



# Travel Tracker

by **app-garden**

Quick Reference for Using the Reporting Export

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## Overview of the Reports Tab

The Reports tab provides an easy way to export data from the Travel Tracker to Excel. It contains a wealth of information and is easy to use with some instruction. Feel free to “play” with the data in the export because you will not impact the data in Travel Tracker.

## Accessing the Export

Click on the Reports Tab. Approvers, bookkeepers, vehicle owners, and those in other Travel Tracker roles will download the export for their location only. Transportation Admin have access to all locations.

Transportation admin can select locations, funding approver, vehicle owner and year/month from this menu option.

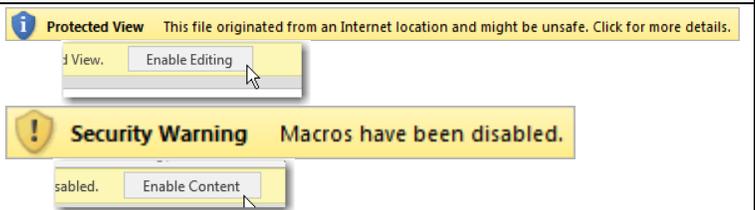
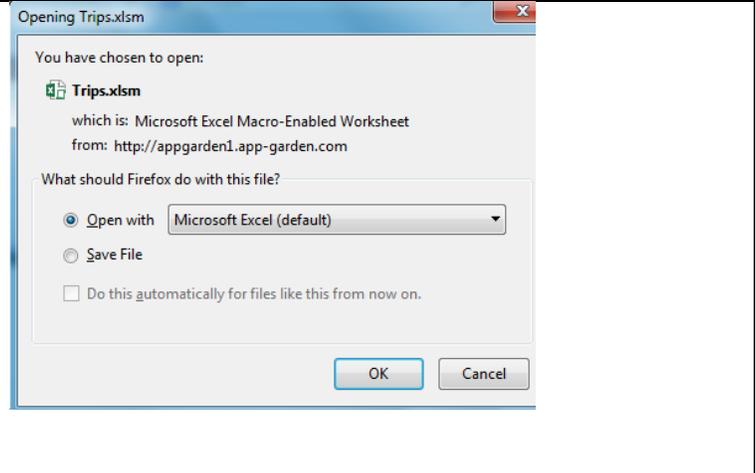
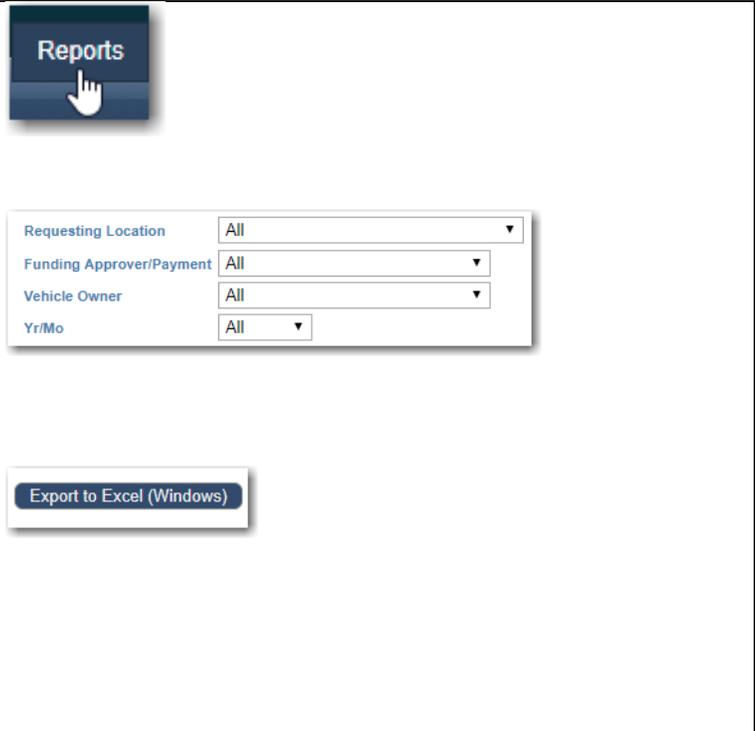
\*\*Tip: filtering for specific information will take less time for the export to open. For example, if you need information for trips in a certain month/year filter first and then export.

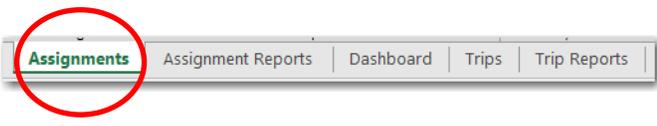
Click the Export to Excel button. Where the Excel spreadsheet opens depends on your browser. Open the spreadsheet document.

The excel file will either be downloaded or will open. This depends on your browser and your browser settings. For instance, Google Chrome usually opens and downloads in the bottom left corner of your browser. Firefox may ask you to open or save the file or will download to the arrow located on the top right of your display.

Once the file is downloaded – click on the file and open. Contact the supportdesk ([supportdesk@cookconsulting.net](mailto:supportdesk@cookconsulting.net)) if you have a problem locating the file.

Be sure to ‘enable editing’ and ‘enable content’ when prompted. These are at the top of your screen. This will take several seconds.



<p>Look in the lower left corner. You will see five tabs: Assignments, Assignment Reports, Dashboard, Trips, Trip Reports. The Assignments tab shows all the details of all the bus and driver assignments in the Travel Tracker. The Trips tab shows all the detail from the Trip Request forms. The Assignment and Trip Reports tabs allow you to access pre-set reports and utilize drag and drop reporting. The Dashboard provides graphical displays of the information in Travel Tracker.</p>	
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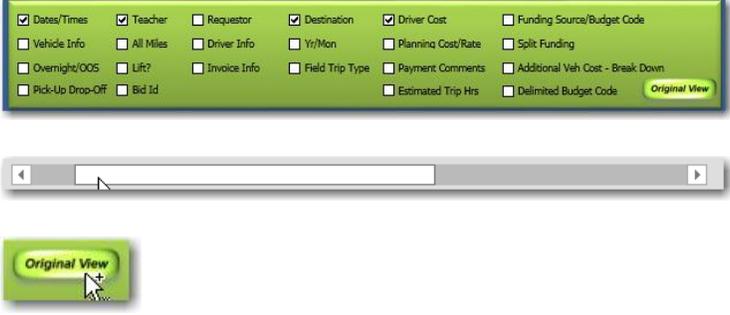
**Use Un-Do Button to correct mistakes!!**

<p>Before we begin, here is a tip: The Un-Do button is your BEST FRIEND while using the spreadsheets. Click this button at the top left corner of your screen to un-do previous selections or clicks. You can often click it multiple times to un-do multiple mistakes. If necessary, exit the spreadsheet and download the export from Travel Tracker again to start over.</p>	
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**Assignments Tab shows all the details of the bus and driver assignments in Travel Tracker**

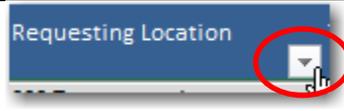
<p>The Assignments tab shows detailed information about the bus and driver assignments, costs, vehicle and driver information. Click on the Assignments tab at the bottom of the screen.</p>	
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**Showing/Hiding Columns**

<p>Find this green box at the top of the spreadsheet. The items that are checked in the green box are showing on the report. The items that are not checked are hidden. Check or un-check boxes to show or hide columns in the spreadsheet. You may need to use this scroll bar at the bottom of the spreadsheet to view the columns with the added information. Click Original View button in the upper right corner of the green box to reset the spreadsheet to the original columns.</p>	
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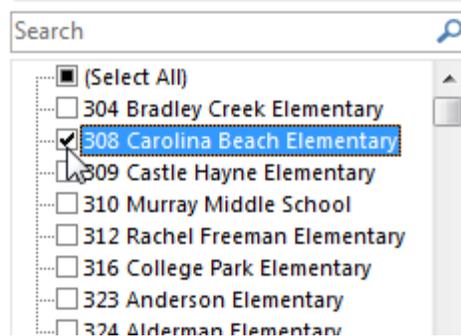
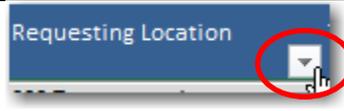
## Using the filter button to select certain information

Each column has a filter button to narrow down the information. Click on the button to open the filter window.

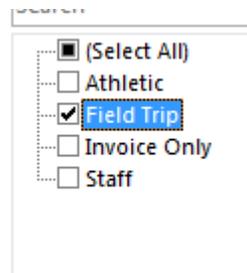


The filter button provides a quick way to narrow down the information that you are requesting. For example, if you would like to see trips from a particular location, click on the filter button in the Requesting Location column.

Take the check mark off of the “Select All” and then select the location or locations that you would like to see in the report.



Note: You can filter on multiple columns. If you would like for example to see only filter trips at Carolina Beach Elementary, click on the filter button for the Type column. Take the checkmark off the “Select All” and select Field Trip in the list.



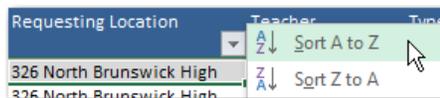
## Sorting the data in the columns

You can also use the filter buttons to sort the information in the columns. Click on the filter button for the column and select either “Sort A to Z” or “Sort Z to A”



You can sort the data alphabetically and in reverse.

To clear this sort, put the Requesting Location back to the original order (Sort A to Z).



## Searching for text within a column

Click on Text Filters to narrow down the information in the column by “contains” word or number.

For example, to see all destinations that include the word “museum”, click on the filter button for the destination column, select Text Filters and use contains museum.

The screenshot shows a software interface with a dropdown menu for 'Text Filters' and a 'Custom AutoFilter' dialog box. The dropdown menu includes options like 'Sort A to Z', 'Sort Z to A', 'Sort by Color', 'Clear Filter From "Destination"', 'Filter by Color', and 'Text Filters'. The 'Text Filters' option is selected, and a sub-menu is visible with options like 'Equals...', 'Does Not Equal...', 'Begins With...', 'Ends With...', and 'Contains...'. The 'Custom AutoFilter' dialog box shows 'Show rows where: Destination' with a dropdown set to 'contains' and a text input field containing 'museum'.

## Totals on the columns

As you filter the information in the columns, the totals at the bottom of the columns will adjust to show the totals of just the information that is showing on the report. For example, if you would like to see a cost of field trips only, filter on the Type column and select just the Field Trips. Scroll to the bottom of the list and you will see that the totals for the mileage, driver costs, total costs etc are the totals for just the field trips. This allows you to easily filter for the particular information that you are looking for and see the associated totals.

The screenshot shows a software interface with a search filter for 'Field Trip' and a table with totals. The search filter is set to 'Field Trip' and the table shows totals for 'Mileage', 'Driver Costs', 'Total Costs', and 'Total'.

Totals	Mileage	Driver Costs	Total Costs	Total
	61577.66	\$36,572.00	\$115,373.46	\$0.00

## Clearing the filters

Notice the filter button contains a filter icon to indicate the column is filtered.

To remove the filter from a particular column, click on the button and select Clear Filter.

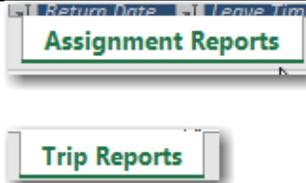
Or click the Filters On/Off button twice to clear all filters from all columns.

The screenshot shows a software interface with a filter icon and a dropdown menu for 'Clear Filter From "Type"'. Below it is a 'Filters On/Off' button.

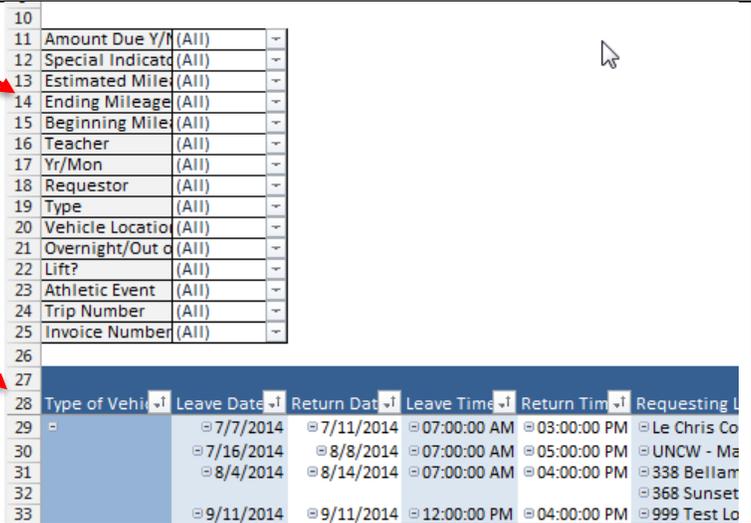
## Assignment/Trip Reports Tabs allows access to pre-set and drag and drop reports

There are two tabs that provide some pre-set reports that you can click on to gain valuable information from the Travel Tracker. The Assignment Reports have information about

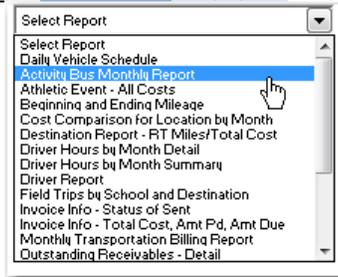
the bus and driver assignments, costs, vehicle and driver information. The Trip Reports have information from the Trip Request forms. These reports can be used as a starting point for information and then you can drag and drop additional information or remove information from the report as needed, providing an unlimited combination of reporting. The reports utilize Excel pivot tables. We have done all of the hard work for you! You will learn to easily drag and drop items onto your reports to provide a great deal of flexibility in your reporting.



The screen is divided into two parts. The top half contains the fields that can be used to create the report and the bottom half contains the report.



There are also drop down options at the top of the screen that allow you to select actions such as running reports. The first drop down menu contains pre-set reports that you can run. Use the scroll bar to view the entire list.



Many of these reports are used by transportation and finance departments on a weekly or monthly basis. Click on a report to run it. View the report at the bottom of the screen. Investigate the various reports to determine the information each contains. Find one that meets or closely meets your needs. You can modify the report using the drag and drop to add or remove information from the report (see below).

Use the Full Screen button to hide the top portion of the screen in order to view the whole report.



To return to initial screen with the drop down options to run another report or to see the



available fields for the report, click on the Return to Pivot Table button. You can move back and forth between the full screen view and the pivot table view using these buttons.

### Drag and drop items to and from the pivot table

The reporting feature uses Excel pivot tables. It is easy to drag and drop fields onto your report or to remove fields from the report. Click and drag the headers onto the report. Click and drag headers off the report and back into the pivot table. You can also use the filter buttons located on the report or in the field list to filter your information.

Amount Due Y/N	(All)
Special Indicators	(All)
Estimated Mileage	(All)
Ending Mileage	(All)
Beginning Mileage	(All)
Trip Number	(All)
Invoice Number	(All)
Athletic Event	(All)
Teacher	(All)
Driver Name	(All)
Vehicle Number	(All)
Requestor	(All)
Vehicle Location	(All)
Return Time	(All)
Return Date	(All)
Leave Time	(All)
Leave Date	(All)
Overnight/Out of State?	(All)
Lift?	(All)
Destination	(All)
Type of Vehicle	(All)

Choosing a pre-set report from the dropdown menu is the easiest way to start.

If there is more detail than you need on the report, you can click and drag a column off the report by clicking ON THE HEADER.



Drag the header of the column and drop it anywhere in the space above the report.

Continue holding down the mouse as you drag it up to the top part. Release the mouse to drop the column anywhere above the report.



If you need more detail in the report, you can drag and drop columns from the field list at the top of the pivot table. Click the information that you want to add from the pivot table. Continue holding down the mouse as you drag it off the pivot table. Notice the bold green vertical guiding line that indicates the location for the new column to be added. Release the mouse to drop the column into the report. Remember – if it doesn't drop where you want it to go, use the Undo button in Excel!

Vehicle Location	(All)
Overnight/Out of State?	(All)

0	Overnight/Out of State?	(All)
1	Lift?	(All)
2	Type	(All)
3	Athletic Event	(All)
4	Trip Number	(All)
5	Invoice Number	(All)
6		

7		
8	Type of Vehicle	Leave Date
9		7/7/2014
0		7/7/2014
1		8/4/2014
2		
3		9/11/2014

Type of Vehicle	Type
	Invoice Only

## Filtering items on the Pivot Table Report

You can filter the report without adding the column to the report using the filter on the pivot table. For example, if you would like to narrow your report down to a particular range of months, click on the filter button for the Yr/Mon column.

Click on the filter button and select the desired information (for example: Show the last quarter of the year.). To select more than one item, check Select Multiple Items. Click ok. Your report will now show the information as you have filtered it.

You can filter on multiple fields within the report. Filters work on columns located at the top of the report as well as columns in the report itself.

Yr/Mon (All) Filter button

Search

(All)

2013/08  
2013/09  
2013/10  
2013/11  
2013/12  
2014/01  
2014/02  
2014/03

Select Multiple Items

OK Cancel

(All)

2014/01  
 2014/06  
 2014/07  
 2014/08  
 2014/09  
 2014/10  
 2014/11  
 2014/12

Select Multiple Items

OK Cancel

Filters On/Off

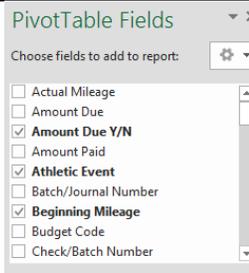
To clear all filtered columns and return to all information available, click on the Filters On/Off button twice (once to remove the filtered items and a second time to turn the filter buttons back on).

## Using the field list to add additional fields that don't show on the report

If the pivot table does not include the field you want to add to your report, you can add the column from the Field List which holds all the available columns in your Travel Tracker. To access the Field List, right click anywhere on the report and choose Show Field List.

Copy  
Format Cells...  
Refresh  
Sort  
Filter  
Subtotal "Requesting Location"  
Expand/Collapse  
Group...  
Ungroup...  
Move  
Remove "Requesting Location"  
Field Settings...  
Show Field List

This list opens on the right side of the screen. Use the scroll bar to find the information needed for your report. Click and drag it to the location on the report or click the check box and it will be inserted automatically.

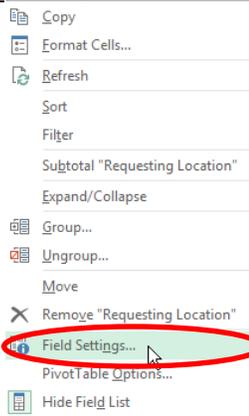


### Adding/removing subtotals to columns

Subtotals in the report show up highlighted in the report. You can remove subtotals from a column or add them to a column as needed. Many of the pre-set reports have subtotals set on certain columns but as you drag and drop columns you may want to adjust where the totals show.

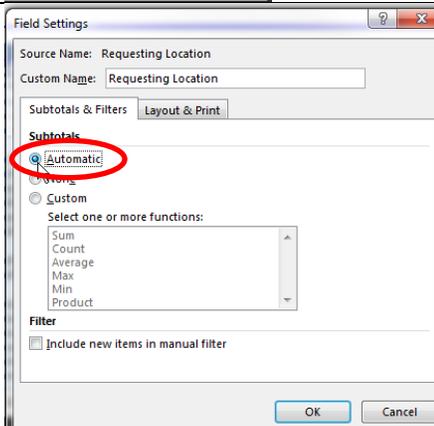
8138	Athletic	1,865.65	\$2,272.61
	Field Trip	1,900.32	\$4,020.32
<b>8138 Total</b>		<b>3,765.97</b>	<b>\$6,292.93</b>
8139	Athletic	1,509.79	\$1,874.09
	Field Trip	676.00	\$1,014.40
	Staff	123.00	\$236.25
<b>8139 Total</b>		<b>2,308.79</b>	<b>\$3,124.74</b>
8140	Athletic	575.00	\$942.75
	Field Trip	2,569.01	\$4,783.26
<b>8140 Total</b>		<b>3,144.01</b>	<b>\$5,726.01</b>
<b>Activity Bus Total</b>		<b>94,998.67</b>	<b>\$143,854.33</b>

To add or remove subtotals on a column in the report, right click on the header for that column. This window will open:

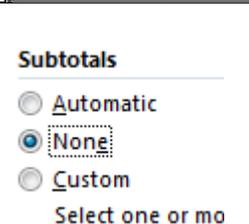


Choose Field Settings...

To add a total, select Automatic by clicking on the circle to the left of Automatic and click OK. This will add a subtotal to each entry (location, etc.) in the column on the report.

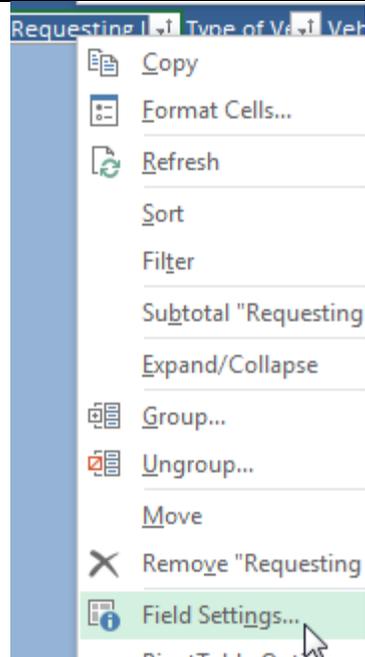


To remove the subtotal from a column, select None and click OK.

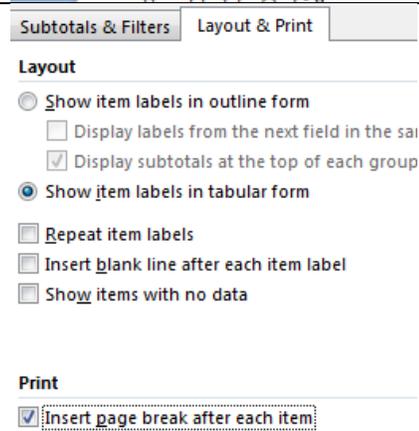


## Inserting page breaks when printing

You can also indicate if page breaks are needed when a column changes values. For example, if you want to print information for each requesting location on a separate page, right click on the column header and select Field Settings.



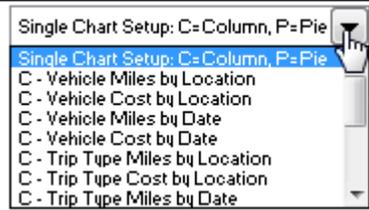
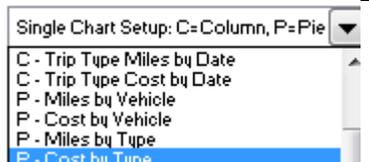
Click on the Layout and Print tab. Click on the “Insert page break after each item”.



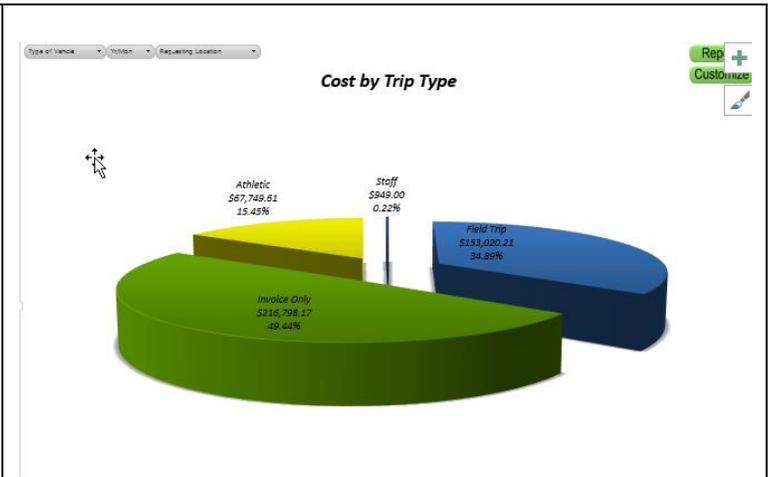
## Saving and printing the report

<p>After you have created the report you need, we make it very easy to save and print the report. Click on the green Full Screen View button to display the report and then click on the blue Copy to Excel Workbook button.</p>	 
<p>The report will automatically copy and move to a new tab that is separate from the export. The tab at the bottom of the report will say Assignment Reports.</p>	
<p>Now you can save and/or print the report by clicking on File on the toolbar in the upper left corner.</p>	
<p>Choose the option you wish to execute.</p>	
<p>To return to the export, exit the workbook or bring up the export from the Excel icons in the tray at the bottom of the screen.</p>	

## Generating individual charts

<p>Individual charts can be generated from the Assignment Reports tab in the spreadsheet.</p> <p>From the Assignment Reports tab, click on the drop down option for Single Chart Setup. Use the scroll bar to see all of the available options. The charts that are preceded with a “C” are column or bar charts. The charts that are preceded with a “P” are pie charts. Simply click on the chart that you would like to generate.</p>	
<p>For example, to generate a pie chart showing the cost of each trip type, select “P – Cost by Type”.</p>	

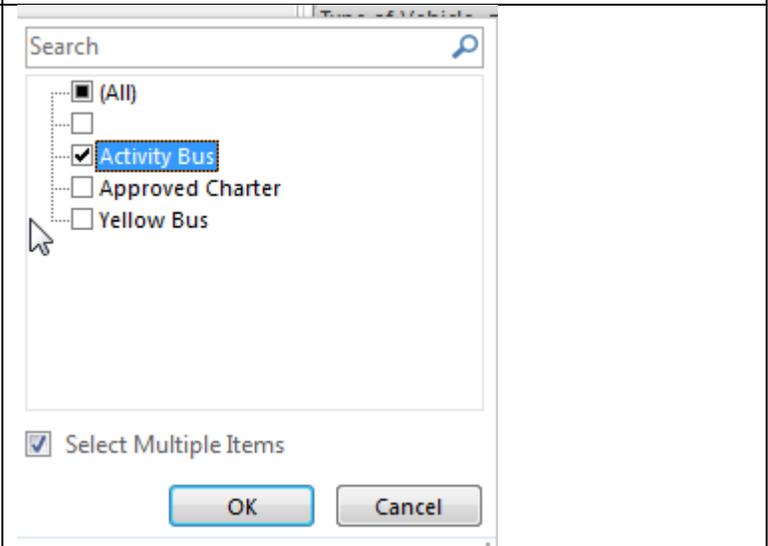
Notice that this will open in a new tab at the bottom.



There are also filter buttons located at the top of the chart. Use these to filter the information for the chart. For example, if I want to see information for only certain types of vehicles, I can use the Type of Vehicle filter.



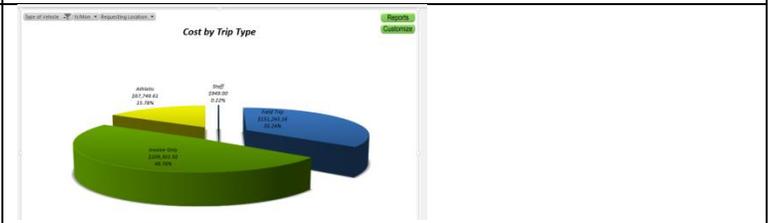
Use the “Select Multiple Items” checkbox to select more than one entry in the list. Click OK.



If the chart has filters on it, the filter symbol will show on the filter button.



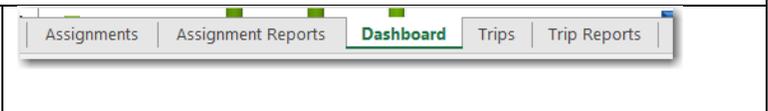
Tip: If you need to use a chart in a word document or PowerPoint presentation, you can click near the edge of the chart to select the entire chart. Then press Ctrl-C to copy the chart. Open Word or PowerPoint and paste the chart into your document (Ctrl-V)



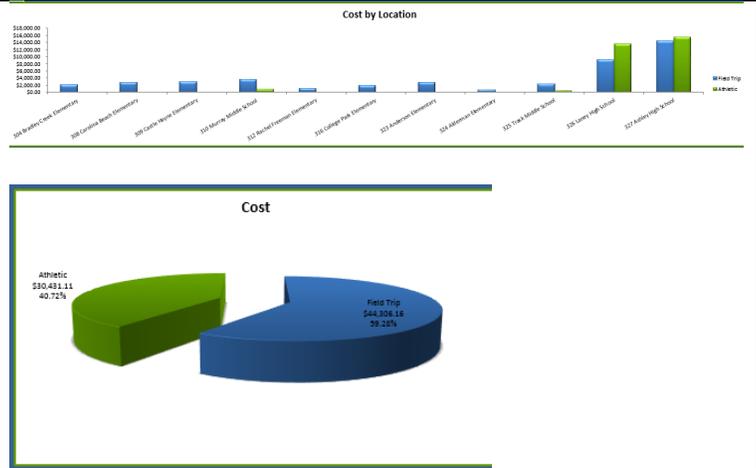
## Dashboard Tab provides graphical displays of the information in Travel Tracker

The Dashboard provides a graphical view of the information in the Travel Tracker. The charts can be filtered to customize the information that displays in the charts.

Click on the Dashboard tab located at the bottom of the spreadsheet. You will see 4 different charts: trip cost by location, trip cost



by date in bar graphs and trip cost by the type of trip and trip cost by month in pie charts.



To filter the data in the charts, use the slicers located to the right of the charts. You need Excel 2010 to use the slicers. Click on an item to filter the chart's data for that item. (For example, under the Type option, click on Field Trip to display only field trip data on all the charts.)

The screenshot shows three slicer panels. The 'Location' slicer lists various school names. The 'Type' slicer has three options: 'Athletic', 'Field Trip', and 'Invoice ...'. The 'Field Trip' option is highlighted with a red circle. The 'Vehicle' slicer has three options: 'Activity...', 'Approv...', and 'Car'.

Notice that Field Trip stays green to indicate that it is selected. The other options are white.

A close-up of the 'Type' slicer. The 'Field Trip' option is highlighted in green, while 'Athletic' and 'Invoice ...' are white. A red circle is drawn below the slicer.

To select multiple items, hold the Control key on your keyboard and click on the items. For example, if you want to see the charts based on a certain range of months, you can use Ctrl-click to select multiple months.

Clear the filters by clicking on the filter button.



You can change the charts to use Mileage rather than Cost on the chart. To make this change, click on the dropdown options for Dashboard Setup and select Miles. All charts will now show the information based on mileage rather than cost.

