Tyler's Versatrans Triptracker®
User's & Administrator's Guide

Tyler's Versatrans Triptracker

For more information, www.tylertech.com

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For more copies of this manual or other materials, please contact us at versatrans.support@tylertech.com.

Technical Support

Technical support is available Monday through Friday, 8:30 a.m. to 7 p.m. Eastern time and is available via telephone and e-mail. Contact information for each is provided below.

Telephone Support

Toll-free Telephone Application Support is available by calling 800.775.5556.

E-mail Support

Application Support is also available via e-mail at: versatrans.support@tylertech.com.

Contents

Chapter 1

Getting Started with Tyler 's Versatrans Triptracker

Topics In This Chapter:

About Triptracker

Welcome to Tyler’s Versatrans Triptracker®. This guide is designed to show you the capabilities of Triptracker and how it can be used to make all aspects of field trip work easier, provide for standardized billing and provide all the people involved with up-to-date information about any trip.

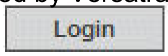
Triptracker is a web based application. That means that Triptracker may be accessed by anyone with proper credentials from anywhere they have access to the internet. This means that drivers, requesters, approvers and Transportation department personnel can all have appropriate access to Triptracker when they need it. Each user’s login can be restricted to only show the data necessary for them to do their work. Requesters see current trips and statuses. Transportation clerks see all activity for the day or week, including trips that need to be assigned, billed, approved, and paid. Triptracker fully automates the field trip request and fulfillment process.

Starting Triptracker & Setting Up Password Retrieval

After installing Triptracker, you will need to open your web browser and navigate to the Triptracker address. The Triptracker address will be “http://<VTTTserver>/<virtual directory>”. For example, if you installed your Triptracker virtual directory (named “triptracker” by default) on a server named “Transportation”, your Triptracker address would be “http://Transportation/triptracker”.

1. Open your web browser and navigate to the Triptracker address. If you have not previously registered Triptracker, the Tyler’s Triptracker Registration dialog displays. If you have already registered, you can go to step 5.
2. Enter your Company/Registration Name in the Registration Name field.

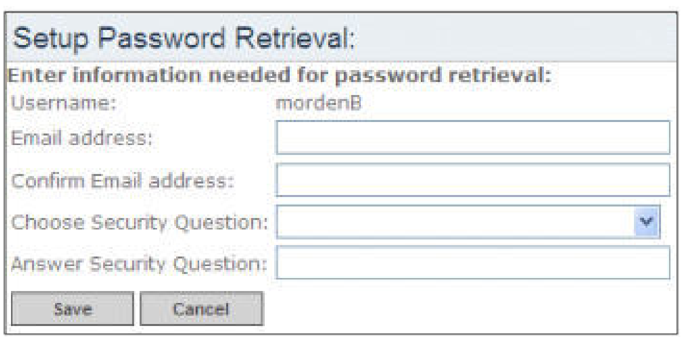
3. Enter your Registration Code. The code can be found with the Triptracker installation files or can be provided by Technical Support.
4. Click to display the Triptracker Login screen.

5. Enter your User Name and Password or enter the Administrator User Name and Password provided by Versatrans.
6. Click 

. The Tyler's Triptracker dialog displays.

Note: If Active Directory Authentication has been enabled (see, the Versatrans Triptracker Configuration Utility Help System, *Configuring Active Directory*), you will see the checkbox **Authenticate using Network Credentials**.

If you have enabled password retrieval (see, *Setting the System Options* on page 6) and an email address is not detected for the user account, the Setup Password Retrieval dialog is displayed.



7. Enter a valid e-mail address where you want your password sent in the event that it is forgotten.
8. Enter the same e-mail address again in the **Confirm Email** address box.
9. Click the drop-down button in the **Choose Security Question** box to display a list of security questions. Choose a security question.
10. Enter an answer for the security question in the **Answer Security Question** box.
11. Click 

. The Triptracker Today screen displays.

Retrieving a Lost Password

In the event that you forget your password, it can be retrieved if you have enabled password retrieval, see *Starting Triptracker & Setting Up Password Retrieval* on page 2.

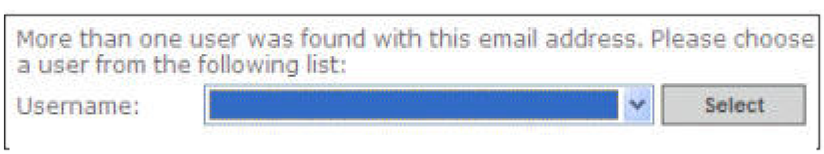
To retrieve a lost password:

1. Launch the software/web browser that you use to access the World Wide Web.
2. Enter the Triptracker URL and go to that address. The Triptracker Login dialog displays.

3. Click forgot password .

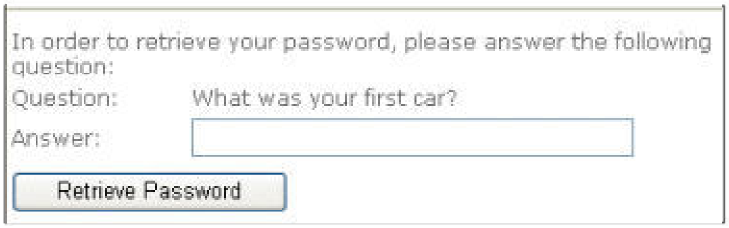
4. Enter and confirm your e-mail address.
5. Click Search

   If more that one user shares an e-mail address, the following dialog is displayed.



6. Click and select a username from the drop-down list.

7. Click Select.



8. Enter the answer for the security question.
9. Click Retrieve Password

You will receive an e-mail message containing you password.

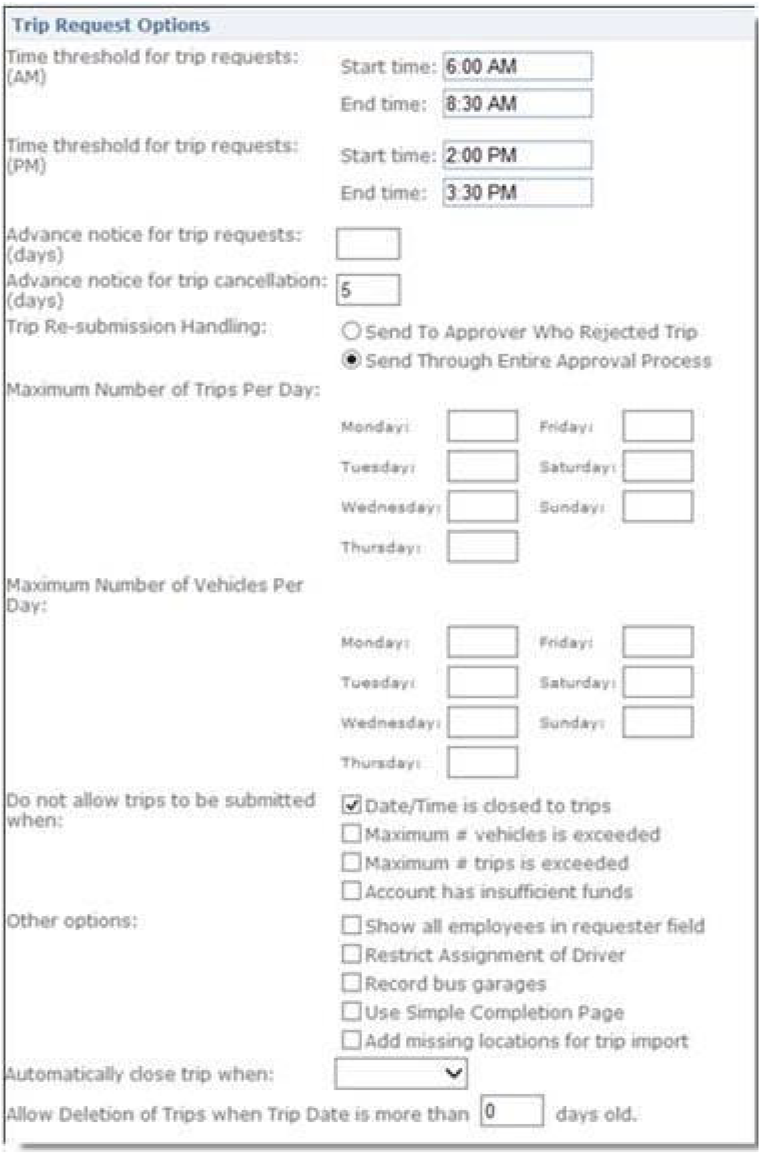
Setting the System Options

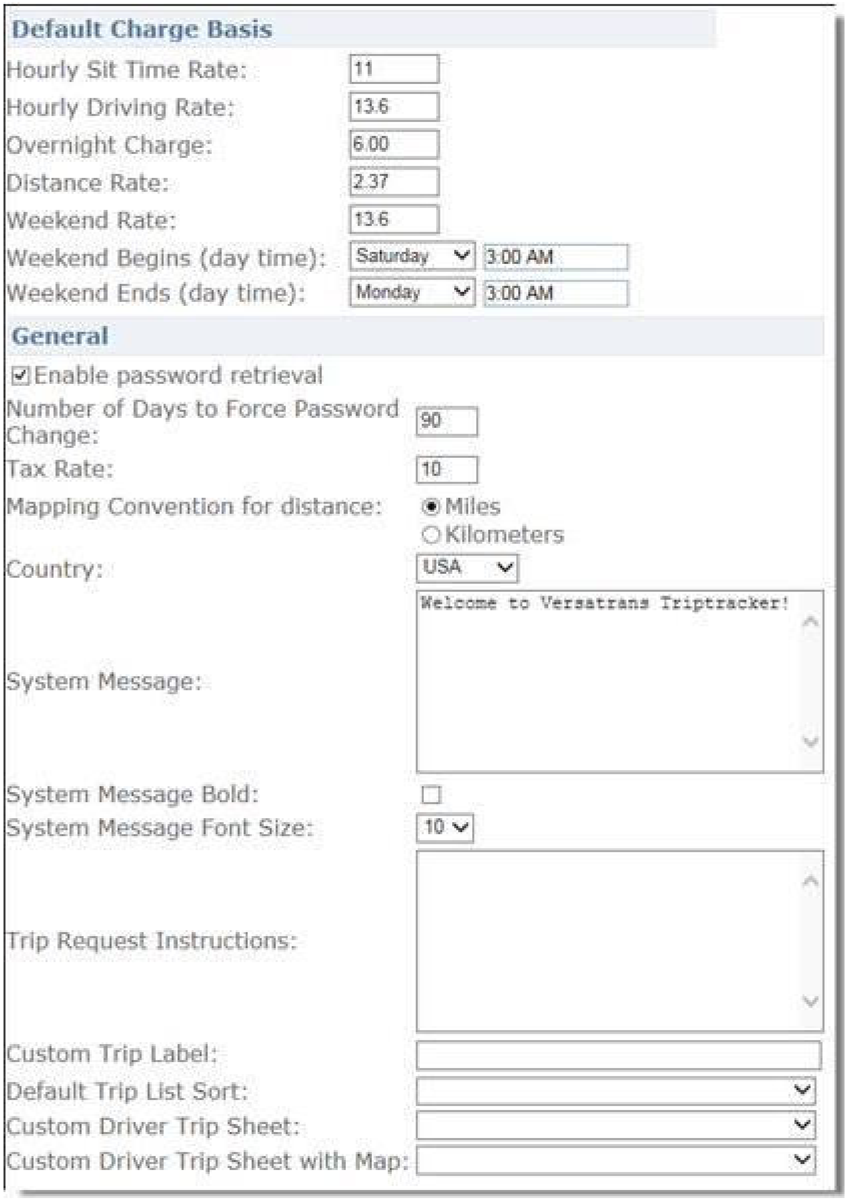
Administrators are able to define certain user-specific settings through the System Options feature. Users must have administrator permissions to access this feature.

To set the system options:

Path:) Admin > System Options

1. Follow the above path to display the System Options screen.





2. Complete the fields, selections, and drop down boxes as appropriate for your installation of Triptracker.

Trip Request Options

Time threshold for trip requests (AM) (PM)

Allows the System Administrator to enter morning (AM) times and afternoon (PM) times during which buses cannot be occupied with field trips. This setting will result in an immediate alert for Requesters if they request a trip during these times.

Note: *Requester will be unable to schedule a trip during these times.*

Advance notice for trip requests (days)

Number of days required between Trip Request date and Trip Departure date. You enter the number of days in this field.

Note: *Requester will be immediately alerted to the issue and will be blocked from submitting request if the number of day's threshold is not met.*

Advance notice for trip cancellation (days)

Number of days required between cancelling trip and Trip Departure date.

Note: *Requester will be immediately alerted to the issue and will be blocked from cancelling request if the number of day's threshold is not met.*

Trip Re-submission handling

Allows you to choose between two choices of how a rejected trip will be handled if it is resubmitted for approval:

- *Send To Approver Who Rejected Trip* - resubmitted request will be sent back to Approver who rejected the trip, bypassing any previous approvers
- *Send Through Entire Approval Process* - Resubmitted request will be sent through entire approval process, starting with the first level of approval.

Maximum Number of Trips Per Day

Allows you to enter the maximum number of trips that can be taken on each day of the week.

Note: *A number of 0 (zero) indicates that there are no trips allowed for that day. If a field is left blank, then there is no maximum number of trips for that day.*

Trips that will be counted when calculating the number of trips for a day include those in the following statuses:

- Requested
- Approved
- Scheduled

Maximum Number of Vehicles Per Day

Allows you to enter the maximum number of vehicles that can be requested on each day of the week.

Note: *A number of 0 (zero) indicates that there are no vehicles allowed for that day. If a field is left blank, then there is no maximum number of vehicles for that day.*

Vehicles that will be counted when calculating the number of trips for a day include those in the following statuses:

- Requested
- Approved
- Scheduled

Do not allow trips to be submitted when:

Date is closed to trips

Allows you to select the action to be taken when someone attempts to schedule a trip on a date that has been specified “Closed - No Trips” **or the trip date’s time range has a “Blocked – Time Range** on the calendar.

- Option not checked - the user is warned but allowed to continue entering trip requests
- Option is checked - the user is not allowed to continue entering trip requests

When a user attempts to “Submit” or “Express Trip” a trip and the Trip date on the request is marked “Closed – No Trips” the following rules will apply:

- If the user is a Super User or the System Option “Date/ Time is closed to trips” is not checked – the user will receive a warning based on either date or time when they click “Submit” or “Express Trip”. The warning message will read as “Warning: This trip date or time has been marked as “Closed - No Trips” or “Blocked – No Trips”. Click **OK** to continue and submit the trip request. Click **Cancel** to return and modify the trip date(s).”
- If the user is not a Super User and the Option “Date/**Time** is closed to trips” is checked - the Trip will not be submitted and an error message will be presented in the top section with other messages. The message will read: “Warning: The date **or time** of this trip had been marked as “Closed – No Trips” **or “Blocked – No Trips”.** on the calendar. This trip has not been saved.”

Maximum # vehicles is Exceeded

Allows you to select the action to be taken when the maximum number of vehicles has been exceeded for a day.

- Option not checked - the user is warned but allowed to continue entering trip requests
- Option is checked - the user is not allowed to continue entering trip requests

When you attempt to “Submit” or “Express Trip” a trip and the “Maximum Number of Vehicles” are exceeded for any of the dates involved in the trip (or if the maximum has already been exceeded) the following rules will apply:

- If the user is a Super User, or the System Option "Maximum Number of Vehicles Exceeded" is not checked – the user will receive a warning when they click "Submit" or "Express Trip". The message will read as "**Warning:** the Maximum Number of Vehicles has been exceeded for this date. Click OK to continue and submit the trip request. Click Cancel to return and modify the vehicles requested."
- If the user is not a Super User and the Option"Maximum Number of Vehicles Exceeded" is checked - the Trip will not be submitted and a warning message is displayed. The message will read: "**Warning:** The maximum number of vehicles has been exceeded for this date. This trip has not been saved**.**"
- Maximum # trips is Exceeded

Allows you to select the action to be taken when the maximum number of trips has been exceeded for a day.

- Option not checked - the user is warned but allowed to continue entering trip requests
- Option is checked - the user is not allowed to continue entering trip requests

When you attempt to "Submit" or "Express Trip" a trip and the "Maximum Number of Trips" are exceeded for any of the dates involved in the trip (or if the maximum has already been exceeded) the following rules will apply:

- If the user is a Super User, or the System Option "Maximum Number of Trips Exceeded" is not checked – the user will receive a warning when they click "Submit" or "Express Trip". The message will read as "**Warning:** the Maximum Number of Trips has been exceeded for this date. Click OK to continue and submit the trip request. Click Cancel to return and modify the trip date(s)."
- If the user is not a Super User and the Option "Maximum Number of Trips Exceeded" is checked - the Trip will not be submitted and a warning message is displayed. The message will read: "**Warning:** The maximum number of trips has been exceeded for this date. This trip has not been saved."

Account has Insufficient Funds

Allows you to select the action to be taken when the account has insufficient funds.

- Option not checked - the user is warned but allowed to continue entering trip requests
- Option is checked - the user is not allowed to continue entering trip requests

When the user attempts to "Submit" or "Express Trip" a trip and the "account has insufficient funds" the following rules will apply:

- If the user is a Super User, or the System Option "Account has insufficient funds" is not checked, the user will receive a warning when they click "Submit" or "Express Trip". The message will read "**Warning:** the account has Insufficient funds. Click **OK** to continue and submit the trip request. Click **Cancel** to return and allocate additional funds.".
- If the user is not a Super User and the Option "Account has insufficient funds" is checked, the trip will not be submitted and a warning message will display. The message will read "**Warning:** the account has Insufficient funds. This trip has not been saved.

Other options:

Show all Employees in Requester field

Determines how employees will be displayed when the. ☐ Expand Requester List is checked in the Trip Details screen.

- When “Show all Employees in Requester field” is **unchecked**, the expanded list of names in the Trip will contain only active non-Transportation employees.
- When “Show all Employees Requester field” is **checked**, the expanded list of names will contain all active Transportation and non-Transportation employees.

Record Bus Garages

The scheduler needs to let the driver know when they are required to leave the bus garage in order to arrive at the trip origin on time, as well as account for the mileage the vehicle travels from the garage to the origin of the trip. You have the option of recording bus garage times for a trip.

- When “Record bus garages” is **unchecked**, garage times for a trip are not recorded.
- When “Record garage times” is **checked**, the garage times for a trip are recorded.

Use Simple Completion Page

The simple Completion screen allows you to manually enter Distance, Driving Time, Sit Time, Overnight Time, Weekend Time, as well as related expenses (i.e. Parking etc.). See, *Completing a Trip Using the Simple Completion Screen* on page 228

Add missing locations for trip import

When using the Trip Import Utility to enter trips (i.e. athletic trips etc.) there are options that will automatically add any missing locations. Selecting this option will activate and display the option, “Add locations” on the Import Utility screen for importing trips. See, *Importing Buildings, Vehicles, Employees, etc.* on page 294.

Automatically close trip when:

The simple Completion screen allows you to manually enter Distance, Driving Time, Sit Time, Overnight Time, Weekend Time, as well as related expens**Automatically close trip when:**

Clicking the drop-down next to this option displays the following list.

Select either Paid in Full, Completed or Invoiced. When the action you selected occurs, the trip will be automatically closed.

Allow Deletion of Trips when Trip Delete is more than ____ days old

The default is 365 days. Enter the number of days old a trip must be more than in order for it to be deleted. The value entered is the age of the trip (number of days old) based upon the Current Date minus the Trip Date. Only trips that have a status of canceled or closed can be deleted when the trips meet the"more than ____ days old" parameters.

Default Charge Basis

The default values entered will automatically populate the trip estimate screen if the account on the trip does not have a charge basis associated with it.

Note: *You can set up specific charge basis records to apply to specific accounts under System Lists > Charge Basis.*

Hourly Sit Time Rate
Enter the hourly dollar amount for sit time.

Hourly Driving Rate
Enter the hourly dollar amount for driving time.

Overnight Charge
Enter the dollar amount per hour for overnight time.

Distance Rate
Enter the dollar amount per mile.

Weekend Rate
Enter the dollar amount per hour for weekends.

Weekend Begins (day time)
Enter the day and time the weekend begins.

Weekend Ends (day time)
Enter the day and time the weekend ends.

General

Enable Password Retrieval
In the event that users forget their passwords, they can be retrieved if the user has checked **Enable password retrieval** and then entered the information for password retrieval, see *Starting Triptracker & Setting Up Password Retrieval* on page 2.After you complete these entries, click

to save these options.

Number of Days to Force Password
Compares the current date to the users "LastPasswordChangedDate" to determine if the user should be forced to change their password

Note: *If there is a value entered for Force "Password Change" for a User Group, then that value will override the value entered in System Options.*

Tax Rate
The Tax Rate applies to all Charge Basis and Invoice Charges specified as taxable.

Mapping Convention for distance
You have option of selecting miles or kilometers.

Country
Select either USA or Canada.

System Message
Type a message in the adjoining box and it will be displayed in the Triptracker Today screen.

System Message Bold
Allows you to display the system message in bold text on the Triptracker Today screen.

System Message Font Size
Allows you to select a font size for the system message that displays on the Triptracker Today screen..

Trip Request Instructions
Enter trip request instructions that will display on the Trip Request/Details screen.

Custom Trip Label
Enter a custom trip label that will display on the Trip Details and Trip Scheduling screens.

Default Trip List Sort
The “Default Trip List Sort” field in System Options allows users to select the default sorting value when performing a trip search. If left blank, the default sort value will continue to be “Trip ID Ascending”.

Custom Driver Trip Sheet/Custom Driver Trip Sheet with Map
“Custom Driver Trip Sheets” and “Custom Driver Trip Sheets with Map” created in Report Writer can now be selected from the System Options screen and printed from the Trip “Scheduling” screen. If no custom driver trip sheets are selected in System Options, the canned “Custom Driver Trip Sheet” and canned “Custom Driver Tip Sheet with Map” will be the default when printing trip sheets.

Triptracker Today

Triptracker Today contains links to trips needing attention (i.e. needing approval, scheduling, etc.) including administrator options. Billing clerks will appreciate Triptracker Today with its special section on trips waiting for payment, invoicing, over budget, etc.

Working In Triptracker Today

When you start Triptracker, the "Triptracker Today" screen displays which acts as the entry/focal point for users. If you need more information on starting Triptracker, see *Starting Triptracker & Setting Up Password Retrieval* on page 2.

Once you have started or are working in Triptracker, you can access Triptracker Today from anywhere within the application by clicking 

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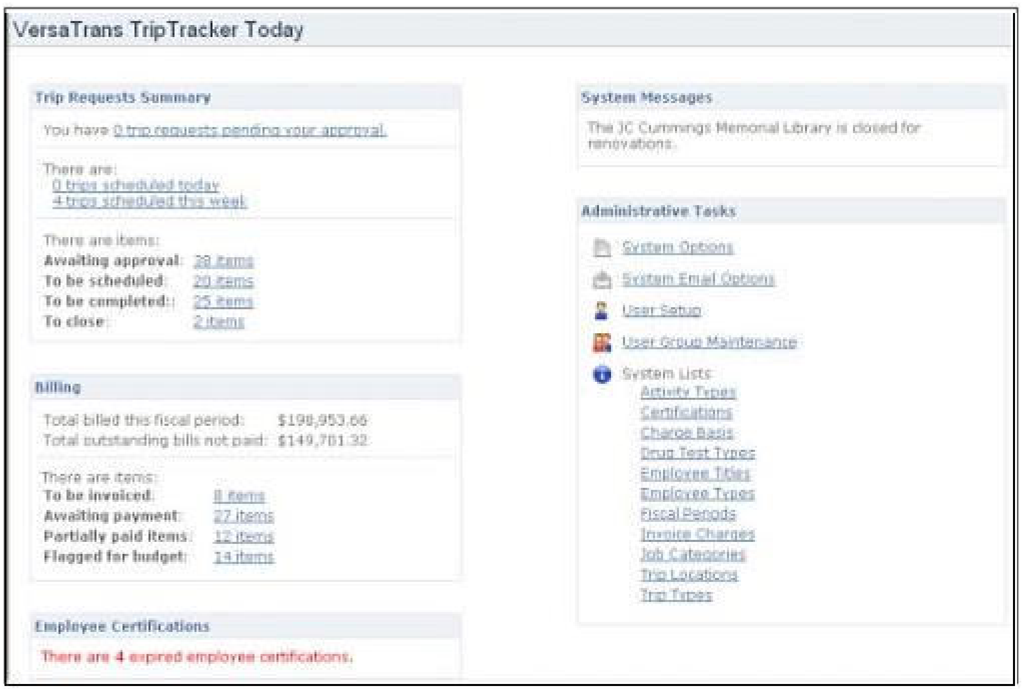


When you logon to Triptracker this is the first screen you will see. It contains information about the five main areas of the application. Each area, except System Messages, has active links to more data within the application. Any text in blue and underlined or in red can be clicked on to move you to more information.

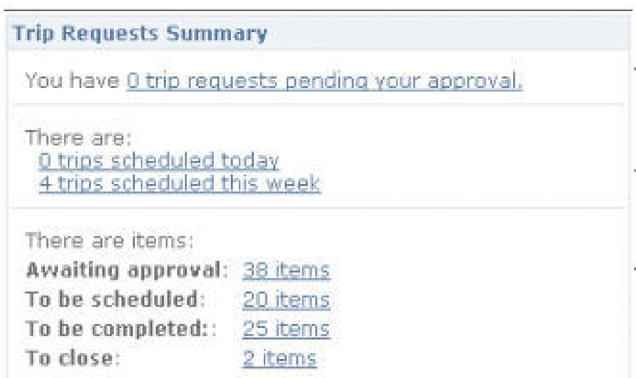
If your user permissions restrict you to particular tasks, only information/links for those tasks will display in the Triptracker Today screen. The above illustration of the Triptracker Today screen comes from a user with Administrator: Super User permissions.

The Triptracker Today screen can consist of six sections:

- Trip Requests Summary
- Billing
- Employee Certifications
- System Messages
- Administrative Tasks

Within these sections are links (i.e. 15 items) that you can click on to access task details and display a screen. (i.e. Calendar, Trip Search, Trip Details Employee, System Options, etc.). These screens allow you to complete the tasks needing your attention. For example, the link description (To be scheduled: 15 items) when clicked on will display the Trip Search screen listing all 15 trips that need to be scheduled.

The following illustrations of the five sections of the Triptracker Today screen describe what screens will display when you click on a link and how each screen works. Each section illustrated below describes what links bring you to what screens.



This link brings you to the Trip Search screen.

These links bring you to the Calendar.

These links bring you to the Trip Search screen.

Trip Search Screen

The Trip Search screen allows you to search for trips. The bottom of the screen displays Trip Request items needing your attention (i.e. needing approval, scheduling, etc.).

Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date	Requester
204	Paid	Steer Roping		Ambrose Society	10/24/2007	McElroy, E

- Clicking on the **Trip Name** will display the Trip Request - Trip Details screen containing tabs for all the stages in the Trip Request process.

- You can select the stage/tab for the task that you need to work with. For information on working with each of these stages, see, *Requesting a Trip* on page 180).

Calendar

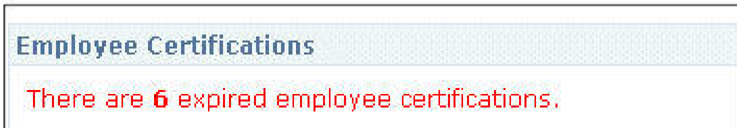
In Triptracker Today, there are links (see the Trip Request Summary illustration) that bring you to the calendar displaying trips that have been scheduled. The scheduled trips can be for the current day or for the current week.

Double-click on a trip to go to the Trip Request screen and work through the different stages for that trip. For more information, see *Triptracker Calendar*.

Automatically updates as payments are posted.

These links bring you to the Trip Search Screen.

This screen allows you to work through the different stages of the Trip Request process. The bottom of the screen displays the billing items needing your attention (i.e. To be invoiced, Awaiting Payment, etc.).



This link brings you to the Employees screen.

Employees with active and expired certifications are displayed at the bottom of the Employee screen.

Employee ID	Employee Name	Status	Home Phone	Employee Type
27	Dench, Marlene	Active	555-518-4311	DRIVER
20	Dodge, Ellen	Active	555-518-2340	DRIVER
19	Doezma, Randy	Active	555-518-5272	DRIVER
30	Dolan, Sherie	Active	555-518-5272	DRIVER
81	DONELSON, WENDY	Active		DRIVER
80	DONLAN, DENISE	Active	555-518-5272	DRIVER
115	Doors, Diana	Active	555-555-5555	DRIVER
114	Dowling, Joseph	Active	555-555-5555	DRIVER
82	DRISKELL, PATTY	Active	555-518-5272	DRIVER
14	Drobnick, Betty	Active	555-518-5272	DRIVER

Previous 1 2 3 4 5 6 7 8 9 10 ... Next

- Clicking on an employee's name displays that employee's record.
- Clicking the Certifications tab displays the Certifications panel.

Calendar | Certifications | Pay Rates | Drug Testing | Refusals | Comment Log

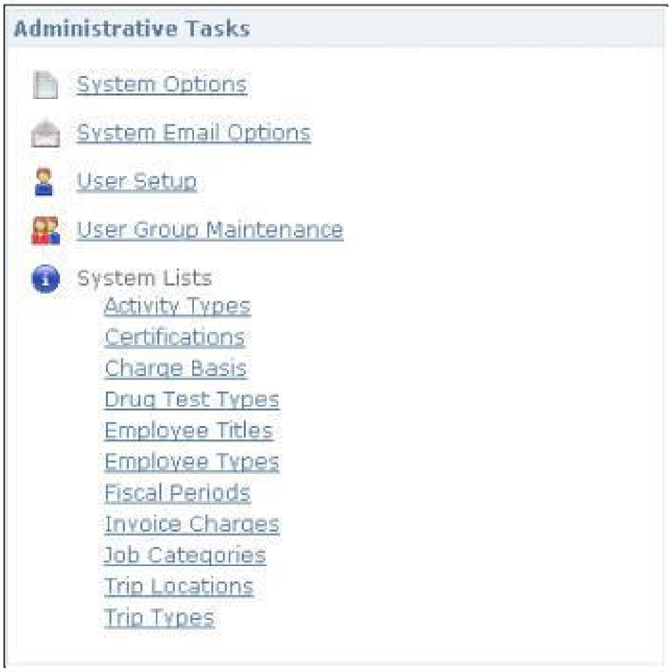
Certifications	Required	Completion Date	Expiration Date	Status	
CDL	Yes	6/01/2007	7/01/2007	Overdue	Edit
CPR	Yes	10/22/2007	10/22/2012	OK	Edit
Mountain Driving	Yes	10/22/2007	10/22/2008	OK	Edit
First Aid	Yes			Missing	Edit
not required	No	10/22/2004	10/22/2005	OK	Edit

When new certification are added (see, *Setting Up Certification Records* on page 49) a number of look ahead days are entered. If the number of look ahead days has passed, the Status column entry reads *Overdue* and the system highlights the entry in red. When you update/edit the certification entries for the employee, the red highlight disappears. For more information, see *Viewing & Updating an Employee's Certification Information* on page 78.

System Messages

The server will be taken down on Monday January 8.

A customized system message can be displayed in the Triptracker System Messages panel. This feature is described in *Setting the System Options* on page 6.



The Administrative Tasks links bring you directly to screens that allow you to work with various tasks. For example, clicking System Options brings you to the Systems Options screen where you can specify system options.

- For information on System Options, User Setup, and User Group Maintenance, see *Backing Up, Restoring & Importing Data* on page 285.
- For information on System Emai Options, see *Setting Up Security & Email* on page 263.
- For information on working with System Lists, see *Working with the Records* on page 31.

Triptracker Calendar

The Triptracker calendar allows users with the appropriate permissions to select a trip from the calendar and go directly to the Trip Request screen where you can work through the trip request process for that trip. You can also initiate a trip request directly from the calendar, filter which trips you'd like to view, change the calendar view to day, week, or month and print a Trip Listing Detail report from the calendar.

The following topics are covered in this section:

Selecting and Working with Trips from the Calendar

The calendar has a three month calendar view and displays the current month and two future months. When you go into the calendar it brings you to the current day on the calendar.

1. You can access the Calendar from anywhere within the application by clicking 

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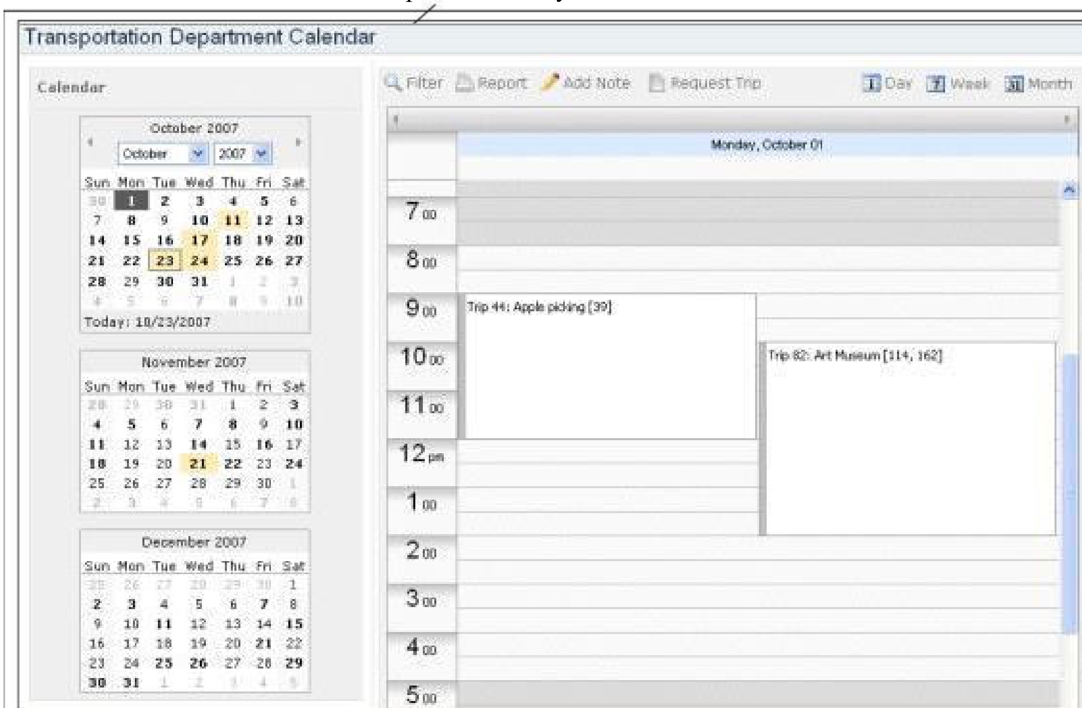
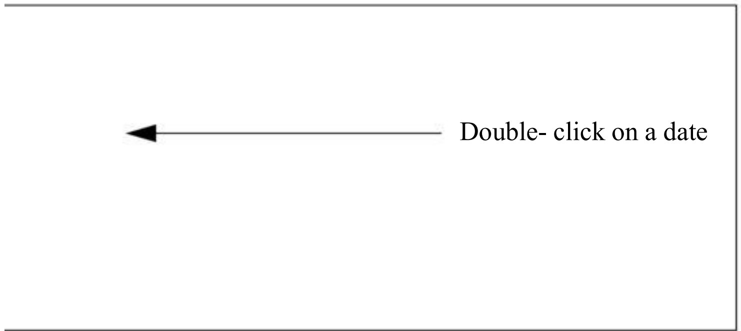
A date with a bold outline indicates
that there are trips on these days.

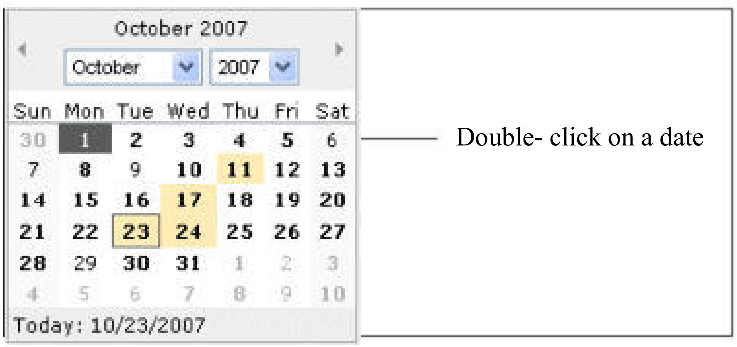


Colored dates indicate that there are Notes for
these days. See, *Adding and Editing Calendar Notes*.

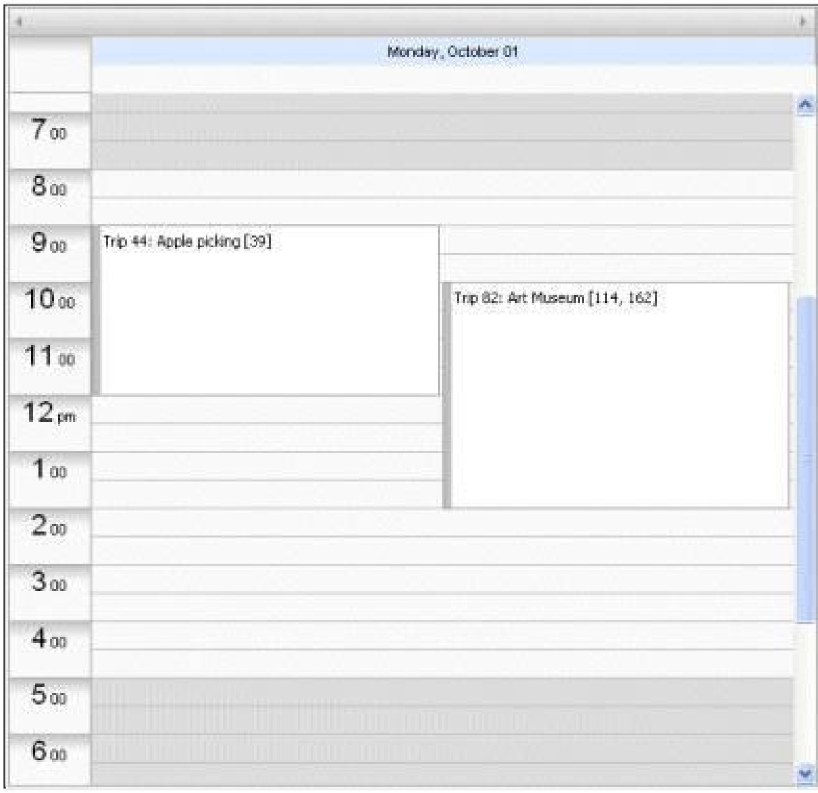
2. You can move forward or backward a month at a time by clicking the arrows in the three month calendar panel.

3. The highlighted dates represent dates that contain trips. Double-click on a highlighted date in the three month calendar to view applicable trips and/or school closings for that date.





In this case, we selected Monday, October 1, 2007 and the trips with that start date are displayed. The beginning and ending times for the trips are also displayed.



Double-click on a trip to go to the Trip Detail screen for that trip.

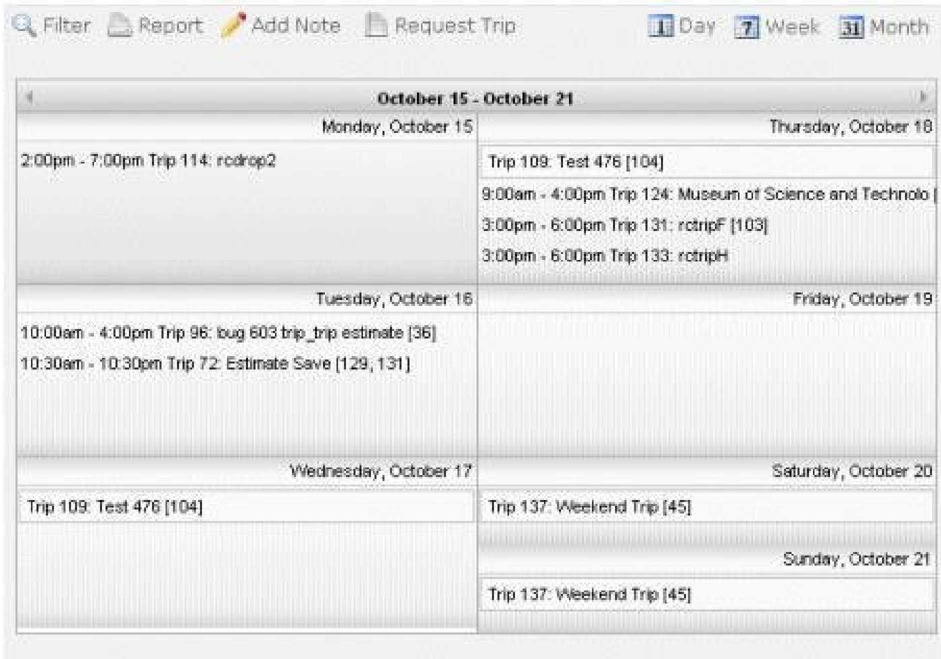
4. Double-click on a trip to go to the Trip Detail screen for that trip.

   You can view the details for that trip and perform different trip request tasks. See, *Working with Trip Requests* on page 175.

Initiating a Trip Request from the Calendar

Users assigned request permissions can request a trip by selecting a day from the weekly or monthly calendar or the time of day from the daily calendar view. Selecting a day or time will auto populate the trip data field and departure time field.

➢ You can access the Calendar from anywhere within the application by clicking .



Double- click on a day in the calendar
to initiate a trip request

For more information on working with trip requests, see *Working with Trip Requests* on page 175.

Filtering Trips and Printing a Trip List Report from the Calendar

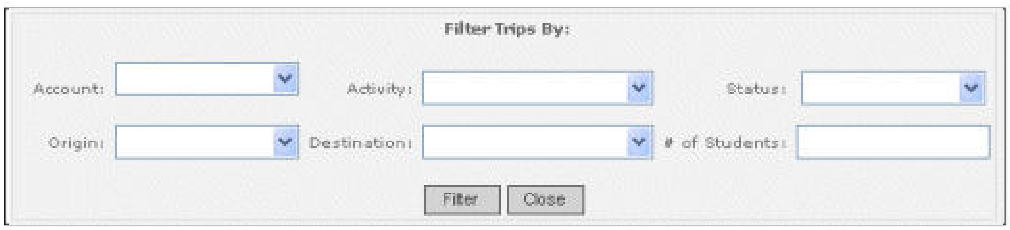
You can filter viewed trips by account, activity, status, origin, destination, and number of students. A filter can be run in any calendar view and will filter on all the trips associated with that view. A Trip List Detail report can be generated from the results of the filter. This is particularly useful for districts who have many trips (50-100) in one day and they want to limit the trips viewed on the calendar. Once a filter is run, a Trip List report can be generated for all currently viewed trips

1. You can access the Calendar from anywhere within the application by clicking 

.

2. Click 

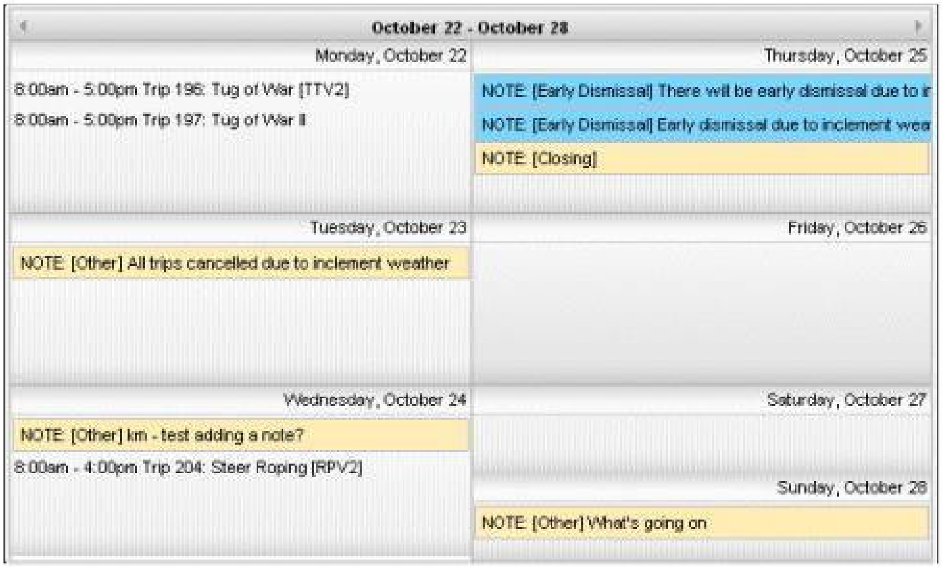
to display the Filter Trips By panel.



3. Click and select the Account that you want to filter on or add to the filter criteria.
4. Click and select the Activity that you want to filter on or add to the filter criteria.
5. Click and select a Status (Requested, Approved, Scheduled, Driver Refused, Completed, Awaiting Payment, Partial Payment, Paid, or Closed) that you want to filter on or add to the filter criteria.
6. Click and select the Origin that you want to filter on or add to the filter criteria.
7. Click and select the Destination that you want to filter on or add to the filter criteria.
8. Enter the # of Students that you want to filter on or add to the filter criteria.

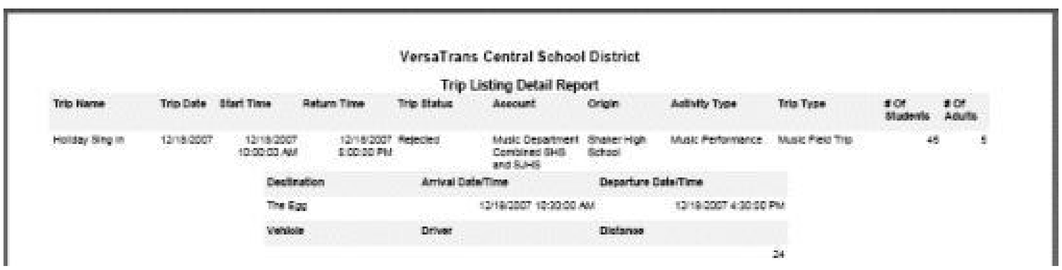
9. Click 

to run the filter on the criteria that you selected. The calendar displays the filter results on the calendar.



10. Click 

to generate a Trip List Report from the results of the filter.



VersaTrans Central School District

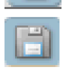
Trip Listing Detail Report

Trip Name	Trip Date	Start Time	Return Time	Trip Status	Account	Origin	Activity Type	Trip Type	# Of Students	# Of Adults
Holiday Sing in	12/18/2007	12/18/2007 10:00:00 AM	12/18/2007 5:00:00 PM	Rejected	Music Department Combined SHS and SJHS	Shaker High School	Music Performance	Music Field Trip	45	5

Destination	Arrival Date/Time	Departure Date/Time
The Egg	12/18/2007 10:30:00 AM	12/18/2007 4:30:00 PM
Vehicle	**Driver**	**Distance**
		24

11. The Trip Listing Detail report shows the details of each trip.

12. Click  to send the report to your printer.

13. Click  and save the report in PDF format.

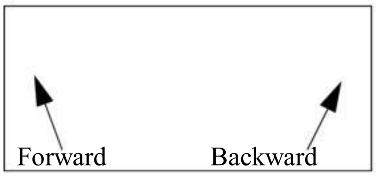
Changing the Calendar View

Yo can change the calendar view to day, week, or month.

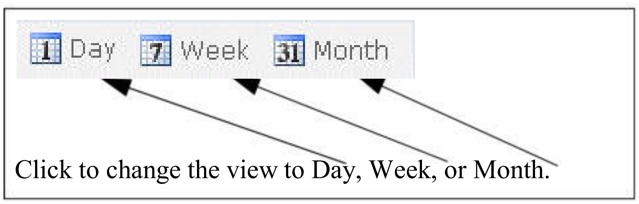
1. You can access the Calendar from anywhere within the application by clicking 

.

2. You can move forward or backward a month at a time by clicking the arrows in the three month calendar panel.



3. Once you have moved to the desired month, click Day, Week, or Month to change the view.



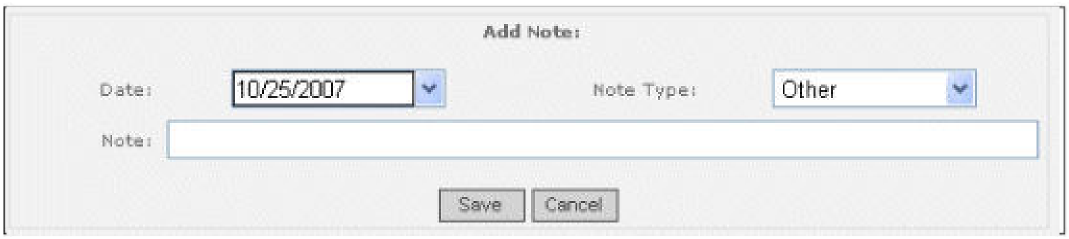
If there are trips or notes for the selected day, week, or month view, they display on the calendar.

Adding, Editing & Deleting Calendar Notes

Users with appropriate permissions can use Notes to add holidays, as well as school/client/department closings (vacations and holidays) and early dismissals to any day on the calendar. Notes can be added in any view (Day, Week or Month) and will display in all views regardless of the view it was created in.

1. You can access the Calendar from anywhere within the application by clicking  .

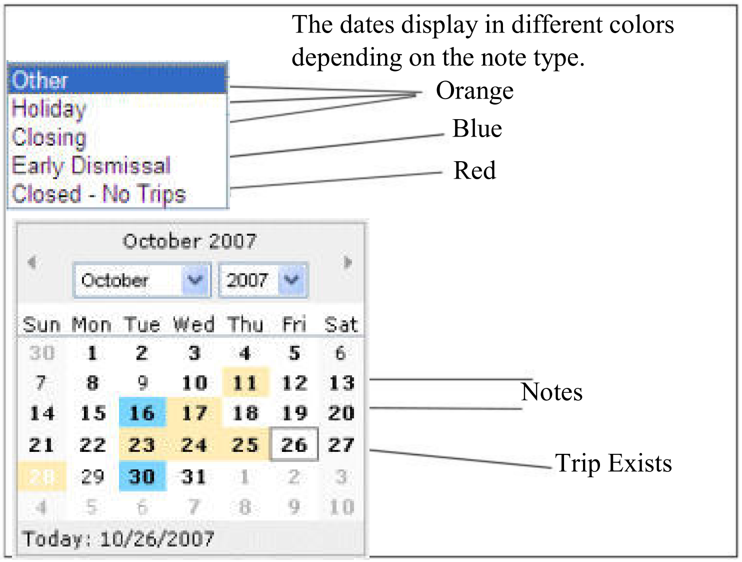
2. Click  to display the Add Note panel.



3. Defaults to the current date. Click  to select a date other than the default. The note will be added to the date selected.

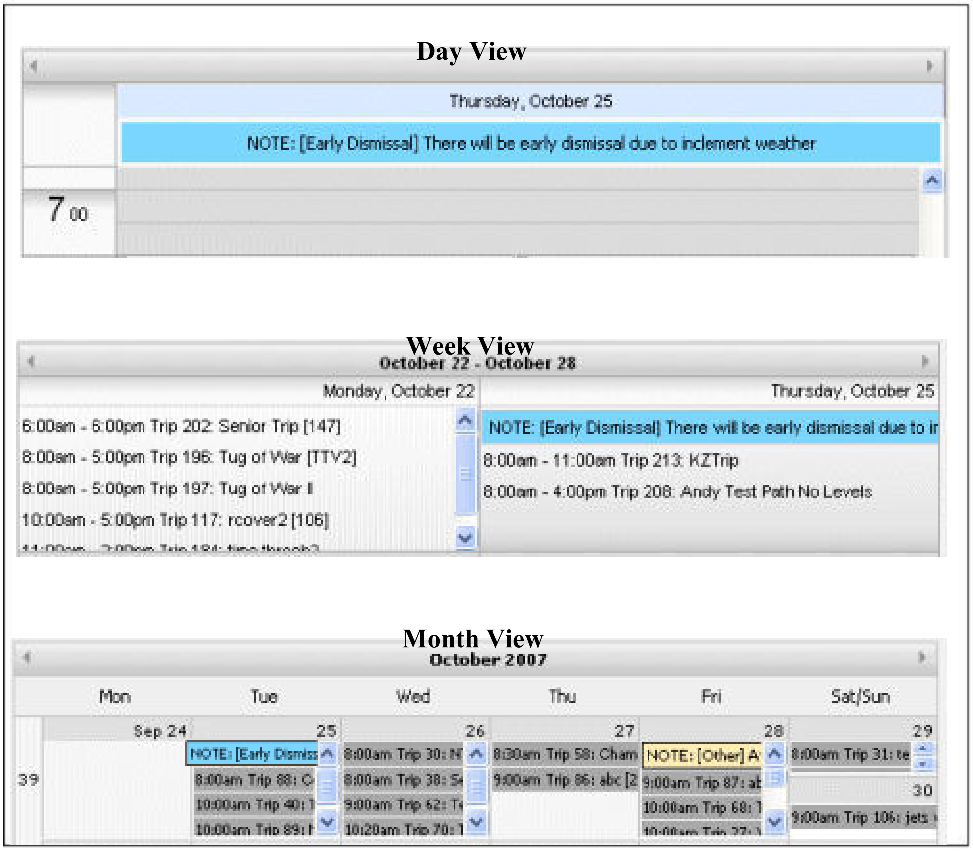
4. There are six categories of notes that you can select from: Other (default), Holiday, Closing, Early Dismissal, Closed - No Trips and Blocked-Time Range. The note type you select is appended to the note (i.e. NOTE: [Early Dismissal]).

5. Click  to select a Note Type other than the default.

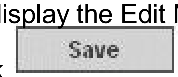


6. Enter the text for the note in the Note field.

7. When you are finished, click . The note is saved and displays in all of the Calendar views.



8. To edit or delete a note, double-click on the note in the Calendar to display the Edit Notes panel.

9. To edit the note, enter changes to the note in the Note field and click 

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10. To delete the note, click 

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C h a p t e r 2

Working with the Records

Topics In This Chapter:

Triptracker System Overview

Congratulations! You are ready to set up the records for the Triptracker system. With Triptracker, you can use as little or as much of the system as you want.

You can use the Trip Request screens to request, estimate, schedule, invoice, and record field trip payments.

Why Do I Have To Fill In These Records?

The Triptracker system processes the daily trip tracking work you do. The more information you fill into the records, the more the system can do for you as you enter field trips later. So it will be easier if you enter the repetitive data once, before you begin.

What Do I Enter First?

We recommend that you enter information in the order listed. The data you need to enter depends upon how you want to use the system.

- *Setting the System Options* on page 6
- *Setting Up the Financial Records* on page 34
- *Setting Up Employee Records* on page 48
- *Setting Up User Groups & Users* on page 264
- *Setting Up Building Records* on page 90
- *Setting Up Vehicle Records* on page 94
- *Setting Up Driver Assignment Rules* on page 103
- *Setting Up Trip Locations* on page 141
- *Setting Up Trip Types* on page 148
- *Setting Up Accounts* on page 156
- *Setting Up Approval Paths* on page 168
- *Setting Up Email* on page 278

Setting Up the Financial Records

If your organization uses financial accounts for field trips, you can enter this account information. For the best results, set up your account records in this order:

- *Charge Basis Records* - The formula the system uses to calculate trip costs
- *Invoice Charge Records* - Additional charges that may apply to an account
- *Fiscal Period Records* - Fiscal year date range settings

Setting Up the Charge Basis Records

By setting the charge basis, you customize the rules that Triptracker uses to determine the cost of the field trip. For example, you might develop a charge basis for team trips (by mileage) and a separate charge basis for local class trips (fixed fee). You can create the charge basis here and assign it to one or more accounts.

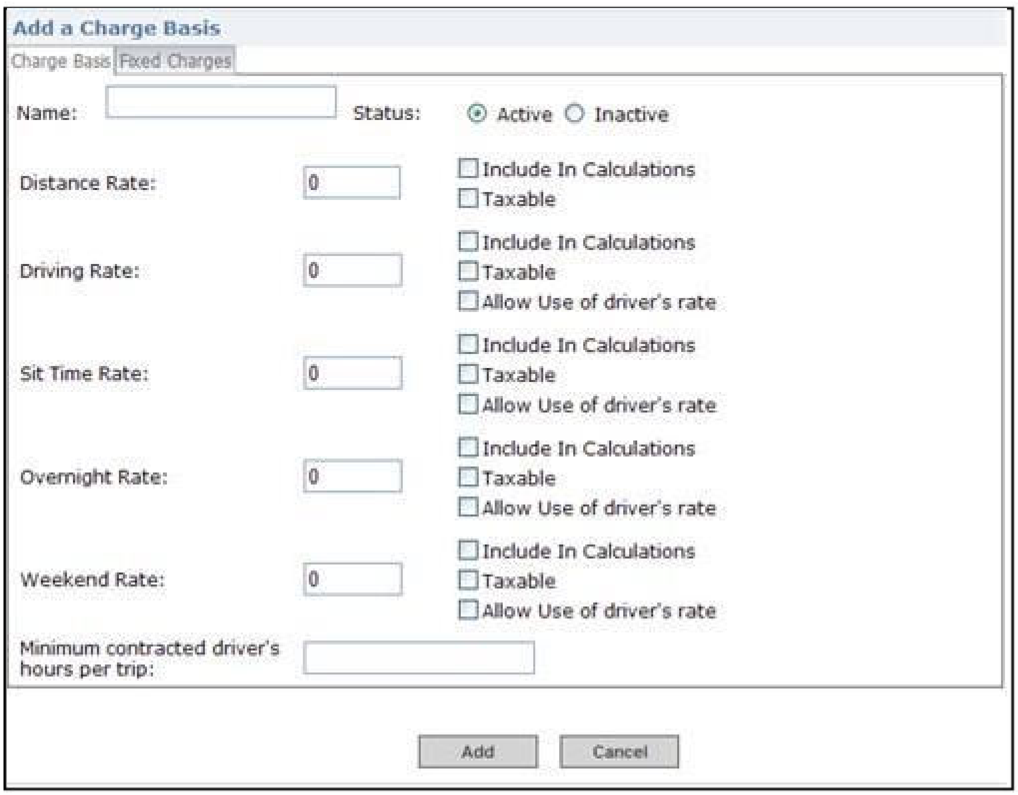
Adding a Charge Basis

You add a charge basis to set the formula(s) Triptracker should use to derive the cost of the field trip.

To add a charge basis:

Path:) Admin > System Lists > Charge Basis

1. Follow the above path to display the System List: Charge Basis screen.
2. Click  to display a blank record



3. Enter the name of the charge basis in the **Name** field.
4. Select **Active** for the status. A charge basis which have been checked as Active will appear for selection in drop-down lists in the account record.
5. Enter the default rates or where applicable check **Use driver's rate.**You can either choose to calculate the driver time using the individual driver's rate as entered in the driver's employee file, or you can enter default driver rates. You can mix the default rates and driver-specific rates if you wish.

   Distance Rate
   Enter the rate per mile/kilometer that will be used in the calculation of the vehicle distance cost for the field trip.

Driving Rate
Allows you to enter a default driving rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver cost for the field trip.

Sit Time Rate
Allows you to enter a default sit rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver sit time cost for the field trip.

Overnight Rate
Enter the dollar amount per hour that will be used in the calculation of the driver overnight cost for the field trip

Weekend Rate
Enter the dollar amount per hour that will be used in the calculation of the driver weekend cost for the field trip.

6. Check **Include In Calculations** to have the default rate included when calculating the charge basis and leave unchecked to have it not included.

7. Check **Taxable** if the invoice charge is taxable and leave unchecked if it is not. The tax rate specified in the administrative system settings is used for calculations.

8. If applicable (only apllies to driving time), enter the **Minimum contracted hours per trip** (the guaranteed minimum number of hours per any given trip).

9. Click 

to add the new charge basis. The new charge basis displays in the Systems List: Charge Basis screen.

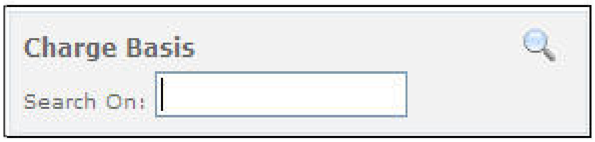
Entering, Editing and Removing Fixed Charges

A charges basis must first exist before you can enter, edit or remove fixed charges assigned to a charge basis. See, *Adding a Charge Basis* on page 35.

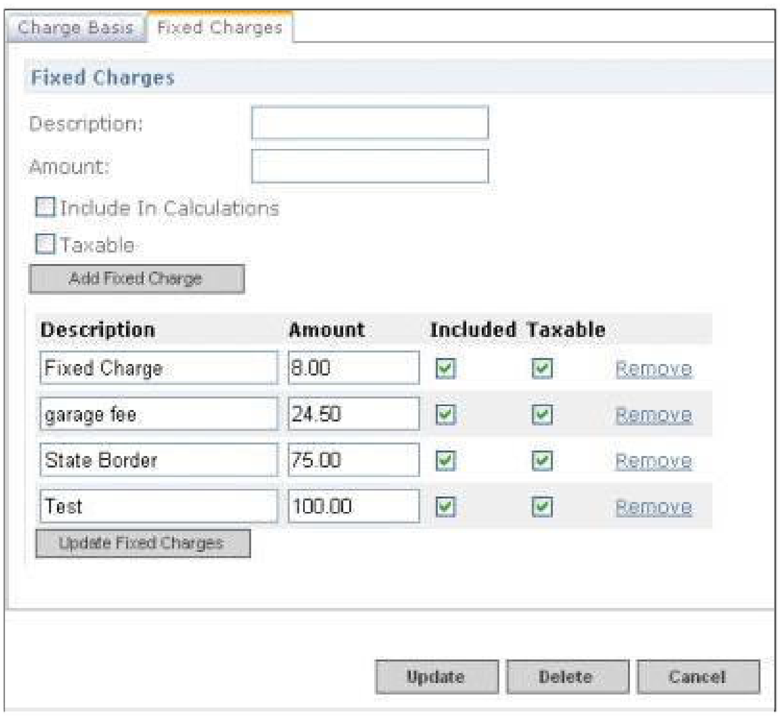
To enter, edit, or remove fixed charges:

Path:) Admin > System Lists > Charge Basis

1. In the System List: Charge Basis screen, click  to display the blank search panel.



2. Start typing the name of the charge basis. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a charge basis to display the Edit Charge Basis screen.
4. Click Fixed Charges to display the Fixed Charges screen.



5. Enter a description of the fixed charge in the **Description** field.
6. Enter the amount of the fixed charge in the **Amount** field.

7. Click [Add Fixed Charge] to add the charge to the list of fixed charges.
8. Check **Include In Calculations** to have the fixed charge included when calculating the charge basis and leave unchecked to have it not included.
9. Check **TaxablE** if the fixed charge is taxable and leave unchecked if it is not. The tax rate specified in the administrative system settings is used for calculations.
10. Clicking **Remove** in the same row as a fixed charge deletes that charge.
11. You can make changes to the fixed charge descriptions and/or amounts by typing over the entries in the applicable fields.
12. Click [Update Fixed Charges] to add the new or changed fixed charges to the charge basis.

Editing a Charge Basis

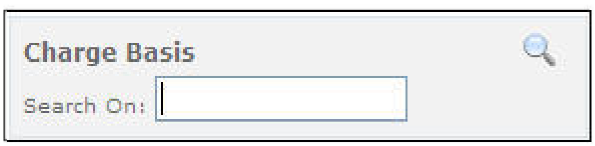
If your organization changes the way it charges for field trips, you can easily make changes to the existing charge basis.

> ***Note:*** *The changes you make to the charge basis calculation are only evident when you generate the invoice.*

To edit a charge basis:

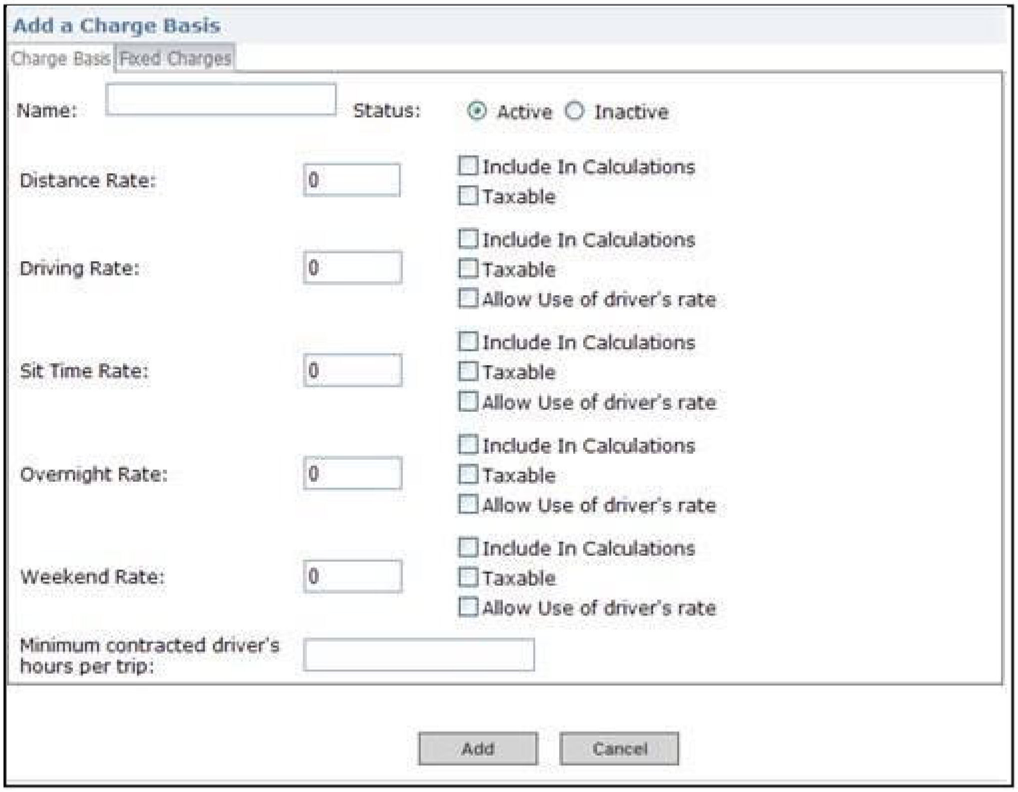
Path:) Admin > System Lists > Charge Basis

1. In the System List: Charge Basis screen, click to display the blank search panel.



2. Start typing the name of the charge basis. As you enter text, the system will display a list of charges that comes closest to matching the text entered.

3. Select a charge basis to display the Edit Charge Basis screen.



4. Type over the fields you want to change and check the associated checkbox if applicable.

   Distance Rate
   Enter the rate per mile/kilometer that will be used in the calculation of the vehicle distance cost for the field trip.

   Driving Rate
   Allows you to enter a default driving rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver cost for the field trip.

   Sit Time Rate
   Allows you to enter a default sit rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver sit time cost for the field trip.

   Overnight Rate
   Enter the dollar amount per hour that will be used in the calculation of the driver overnight cost for the field trip

   Weekend Rate
   Enter the dollar amount per hour that will be used in the calculation of the driver weekend cost for the field trip.

5. After you complete your changes, click to save your changes.

Deactivating a Charge Basis

We do not recommend that you delete a charge basis, but you can do so. We recommend you make it inactive so it doesn't display as an option in the future.

To deactivate a charge basis:

Path:) Admin > System Lists > Charge Basis

1. In the System List: Charge Basis screen, click  to display the blank search panel.
2. Start typing the name of the charge basis. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a charge basis to display the Edit Charge Basis screen.
4. Click Inactive in the Status field.
5. Click Update to save your changes.

Setting the Default Charge Basis

You can set a default charge basis in the Accounts screen if you have permission to edit it. See *Setting Up Accounts* on page 156 for more information.

Setting Up the Invoice Charges

Your organization may use invoice charges to add additional field trip charges. Invoice Charges are a way to capture costs associates with a trip that are not directly related to a drivers pay or the operating costs of a vehicle. They may include things like cleaning of a vehicle or administrative tasks. You can use the taxable field to keep track of taxes. Invoice charges are not required, so you do not have to add them.

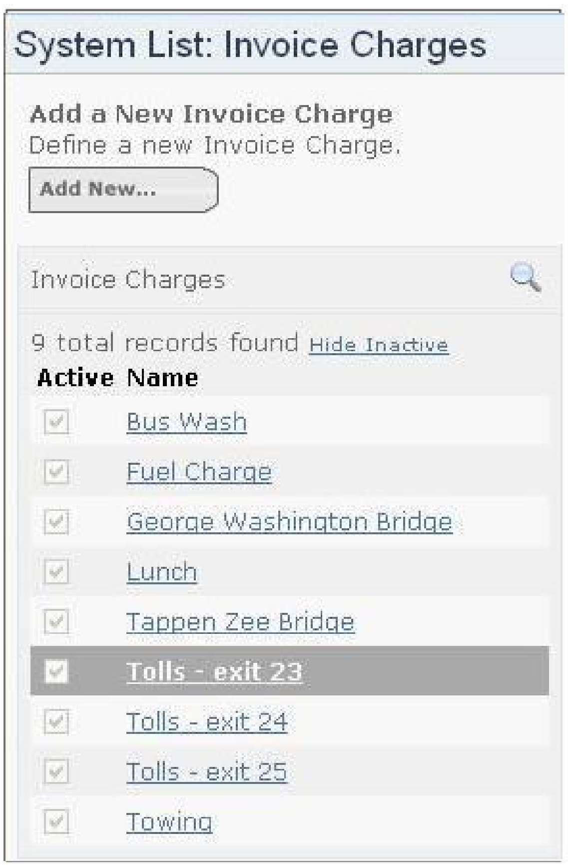
Note: *Unlike fixed costs that are automatically entered on every trip associated with a particular* ***Charge Basis****,* ***Invoice Charges*** *can be added for any trip as needed to recover costs associated with the trip.*

Adding an Invoice Charge

To add an Invoice Charge:

Path:) **Admin > System Lists > Invoice Charges**

1. Follow the above path to display the System List: Invoice Charges screen.



2. Click to display a blank record.
3. Enter the name of the invoice charge in the Name field.
4. Enter the price of the invoice charge in the Price field.

   Select **Active** for the status. Invoice charges which have been checked as Active will appear for selection in drop-down lists throughout the application.

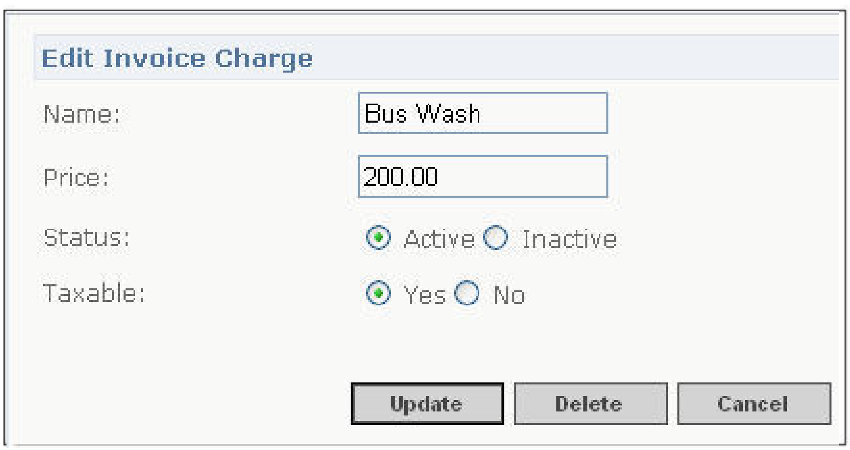
5. Select **Yes** if the invoice charge is taxable and **No** if it is not. The tax rate specified in the administrative system settings is used for calculations.
6. Click to add the new invoice charge. The new invoice charge appears on the Invoice Charges list.

Editing an Invoice Charge

To edit an invoice charge:

Path:) Admin > System Lists > Invoice Charges

1. In the System List: Invoice Charges screen, click to display the blank search panel.
2. Start typing the name of the invoice charge. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select an invoice charge to display the Edit Invoice Charge screen.



4. You can change the name and status of the invoice charge.
5. You can change whether or not the invoice charge is taxable by selecting **Yes** or **No** in the status field.
6. After you complete your changes, click to save your changes.

Deleting an Invoice Charge

To delete an invoice charge:

Path:) **Admin > System Lists > Invoice Charges**

1. In the System List: Invoice Charges screen, click  to display the blank search panel.
2. Start typing the name of the invoice charge. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select an invoice charge to display the Edit Invoice Charge screen.
4. Click Delete .

5. Click **OK** to delete the invoice charge record. The record is deleted and it's name is removed from the Invoice Charge list.

Deactivating an Invoice Charge

To deactivate an invoice charge:

Path:) **Admin > System Lists > Invoice Charges**

1. In the System List: Invoice Charges screen, click  to display the blank search panel.
2. Start typing the name of the invoice charge. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select an invoice charge to display the Edit Invoice Charge screen.
4. Click ⦿ Inactive in the Status field.
5. Click Update to save your changes.

Showing Inactive Invoice Charge Records in the Invoice Charges List

Only the "active" invoice charge records display in the invoice charge list. You have the option of displaying the "Active" and "Inactive" invoice charge records in the invoice charge list.

To show active and inactive invoice charge records in the invoice charges list:

Path:) Admin > System Lists > Invoice Charges

- Click Show Inactive in the Invoice Charges screen to show the active and inactive records.

Setting Up the Fiscal Periods

Fiscal Periods, or budget periods, are blocks of time that a fixed amount of money for trips has been allocated for. It could be by quarter or annually or any other method used in your district.

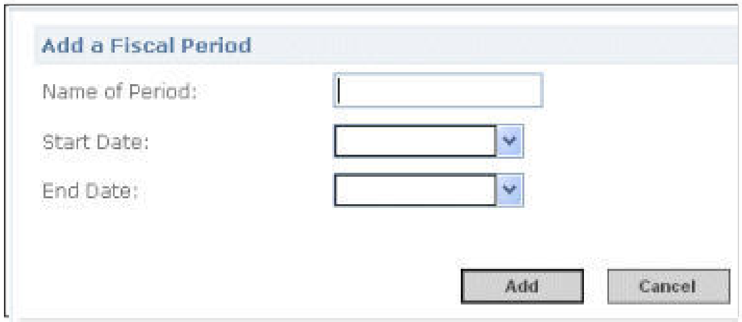
Adding a Fiscal Period

To add a Fiscal Period:

Path:) Admin > System Lists > Fiscal Periods

1. Follow the above path to display the System List: Fiscal Periods screen.

2. Click to display a blank record.



3. Enter a name for the fiscal period.
4. Enter a start and end date or use the drop-down buttons to select dates from a calendar.
5. When you have completed these entries, click to save the new record.
6. You can continue adding new records by clicking 

.

Editing a Fiscal Period

To edit a fiscal period:

Path:) Admin > System Lists > Fiscal Periods

1. In the System List: Fiscal Periods screen, click  to display the blank search panel.
2. Start typing the name of the fiscal period. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a fiscal period to display the Edit Fiscal Period screen.
4. Place your cursor in the field you want to change the entry for and type over the existing entry. You have the option of selecting dates from a calendar in the Start and End Date fields.
5. After you complete your changes, click to save your changes.

Deleting a Fiscal Period

To delete a fiscal period:

Path:) Admin > System Lists > Fiscal Periods

1. In the System List: Fiscal Periods screen, click to display the blank search panel.
2. Start typing the name of the fiscal period. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a fiscal period to display the Edit Fiscal Period screen.
4. Click Delete .
5. Click **OK** to delete the fiscal period record. The record is deleted and its name is removed from the Fiscal Periods list.

Setting Up Employee Records

You can keep track of a wide variety of certifications and employee records in the Triptracker system. Most frequently you keep track of drivers, their certifications, their hiring information, and their drug testing records. If you are currently working with Routing & Planning and Fleetvision, you have probably set up most of the employee records. These records can also be imported into Triptracker.

If you are installing Triptracker from scratch, there is a definite order you need to follow to set up certification and employee records properly.

1. ***Certification Records***: You set these up first so you have base certification records to work with. Here is where you enter all of the certifications required by law and by your organization for all of your employees. Examples could include license classifications, sensitivity certifications and minimum reading competency.
2. ***Employee Type Records***: In these records you match up the certification records you entered with the type of employee to determine which certifications are required for each type of employee. Setting up these records helps you keep on top of each employee's certifications and ensures that each employee is qualified for the position he or she holds.
3. ***Employee Records***: This is where you enter the individual records of your employees. This information includes their address, and other personal data plus the employee type information which carries with it the certification information you entered in the certifications section.

Note: *If you have Routing & Planning or Fleetvision, employee records that are drivers are seen in both products.*

Setting Up Certification Records

Before you can set up employee records, you have to establish the required and non-required certification records.

Adding Certification Records

The Triptracker system keeps track of the required certifications for each employee type. When you add a new employee, the system checks to see if the employee meets those minimum requirements for certification. Then, you update their employee record with their certification information. If the employee does not have all of the certifications required, the system displays the missing or overdue certifications.

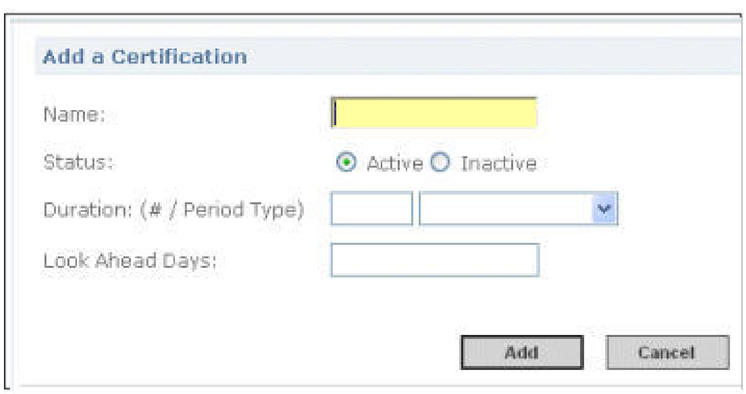
Before you can add and work with employee records, it is important to enter required certification information. These records establish the minimum certification requirements. In addition, you have to enter the employee type records to tie the workers to their appropriate certifications. Then, in the employee records themselves, you keep track of the individual certification records. You can use these records to ensure your employees' certifications are up-to-date and prevent untimely certification expirations.

To add certification records:

Path:) **Admin > System Lists > Certifications**

1. Follow the above path to display the System List: Certifications screen.

2. Click .



3. Complete the fields in the Add a New Certification screen.

   Name
   Type the name of the certification in this field. For example, Driver.

   Status
   Select either **Active** or **Inactive**.

   Certification names which have been checked as **Active** will appear in any employee record which has an employee type associated with the certification. For example, if Jane Jones is a driver, only certifications which have been associated with drivers will appear in Jane's employee record.

   If you change an Active status to **Inactive**, the status change will take effect on future employee records once the status change has been saved. The inactive certification name will not disappear from employee records, but it will no longer be actively tracked.

   Duration (#/Period Type)
   Enter the amount of time the certificaton is valid for. For example, 365 days or 6 months. You can also select "Never Expires".

   Look Ahead Days
   Type the number of days warning you want the system to give you when employees' required certification comes due.

   When the certification due date falls within the number of days you enter in this field, the system displays the *Coming Due* warning message in the Certifications tab, Status column of the employee's screen and highlights the entry in yellow. When the number of look ahead days is passed, the system highlights the entry in red and displays the label *Overdue*.

4. When you have completed these entries, click   to save the new record.
5. You can continue adding new records by clicking 

.

Editing Certification Records

To edit certification records:

Path:)   Admin > System Lists > Certifications

1. Click  to display the blank search panel.
2. Enter a certification name in the **Search On** field. As you enter the certification name, the system will display a list of certifications containing the text entered.
3. Select a certification to display the Edit Certification screen.
4. Place your cursor in the field you want to change the entry for and type over the existing entry.
5. After you complete your changes, click   to save your changes.

Deleting Certification Records

To delete certification records:

Path:) Admin > System Lists > Certifications

1. Click  to display the blank search panel.
2. Enter a certification name in the **Search On** field. As you enter the certification name, the system will display a list of certifications containing the text entered.
3. Select a certification to display the Edit Certification screen.
4. Click 

.

5. Click **OK** to delete the certification record. The record is deleted and its name is removed from the Active Name list.

Showing Inactive Certifications in the Certifications List

Only the "active" certifications display in the certifications list. You have the option of displaying the "Active" and "Inactive" certifications in the certifications list.

To show active and inactive certifications in the certifications list:

Path:) Admin > System Lists > Certifications

- Click Show Inactive in the Certifications screen to show the active and inactive records.

Setting Up Employee Titles

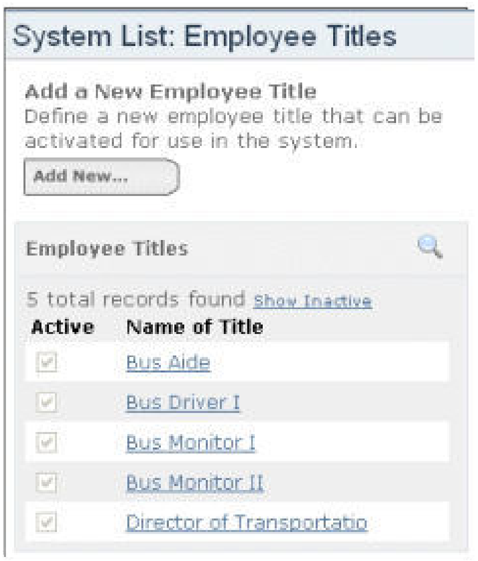
Employee titles are used for categorizing employees and can be used as a separate identifier rather than employee type.

Adding an Employee Title

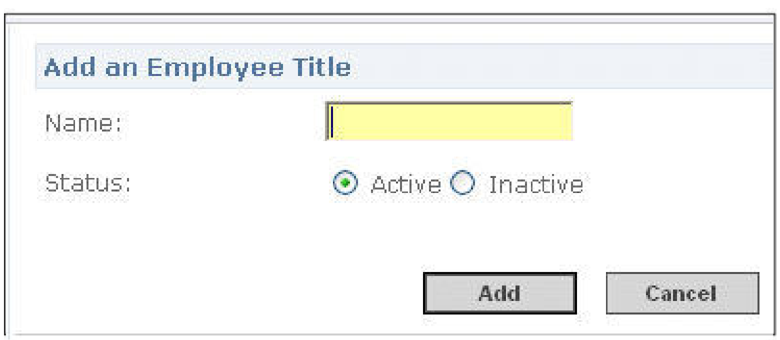
To add an employee title:

Path:) Admin > System Lists > Employee Titles

1. Follow the above path to display the Employee Titles screen.



2. Click to display a blank record.



3. Enter the name of the Employee Title in the Name field.

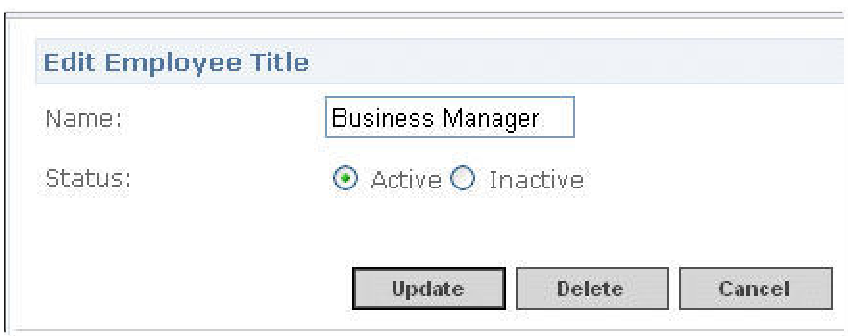
4. Select Active for the status. Employee titles which have been checked as Active will appear for selection in drop-down lists throughout the application.
5. Click Add to add the new employee title.

Editing an Employee Title

To edit an employee title:

Path:) **Admin > System Lists > Employee Titles**

1. Follow the above path to display the System List: Employee Titles screen.
2. Click to display the blank search panel.
3. Enter an employee title in the **Search On** field. As you enter the employee title, the system will display a list of employee titles containing the text entered.
4. Select an employee title to display the Edit Employee Title screen.



5. You can change the employee title name by typing a new name in the Name field.
6. You can change the status to Active or Inactive.

   Employee Titles which have been checked as Active will appear for selection in drop-down lists throughout the application.

   If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive employee title will no longer be actively tracked.

7. After you complete your changes, click to save your changes.

Deleting an Employee Title

To delete an employee title:

Path:) Admin > System Lists > Employee Titles

1. Follow the above path to display the System List: Employee Title screen.
2. Click to display the blank search panel.
3. Enter an employee title in the **Search On** field. As you enter the employee title, the system will display a list of employee titles containing the text entered.
4. Select an employee title to display the Edit Employee Title screen.
5. Click Delete .

6. Click **OK** to delete the employee title record. The record is deleted and its name is removed from the Employee Titles list.

Deactivating an Employee Title

To deactivate an employee title:

Path:) Admin > System Lists > Employee Titles

1. Follow the above path to display the System List: Employee Titles screen.
2. Click to display the blank search panel.
3. Enter an employee title in the **Search On** field. As you enter the employee title, the system will display a list of employee titles containing the text entered.
4. Select an employee title to display the Edit Employee Title screen.
5. Click Inactive in the Status field.
6. Click Update to save your changes.

Showing Inactive Employee Title Records in the Employee Titles List

Only the "active" employee title records display in the employee title list. You have the option of displaying the "Active" and "Inactive" employee title records in the employee title list.

To show active and inactive employee title records in the employee titles list:

Path:) **Admin > System Lists > Employee Titles**

- Click Show Inactive in the Employee Titles screen to show the active and inactive records.

Setting Up Employee Types

Employee types allow you to assign certifications to a type of employee and to determine which types of certifications are required for that type of employee. Employee type records also help you track the status of employee certifications.

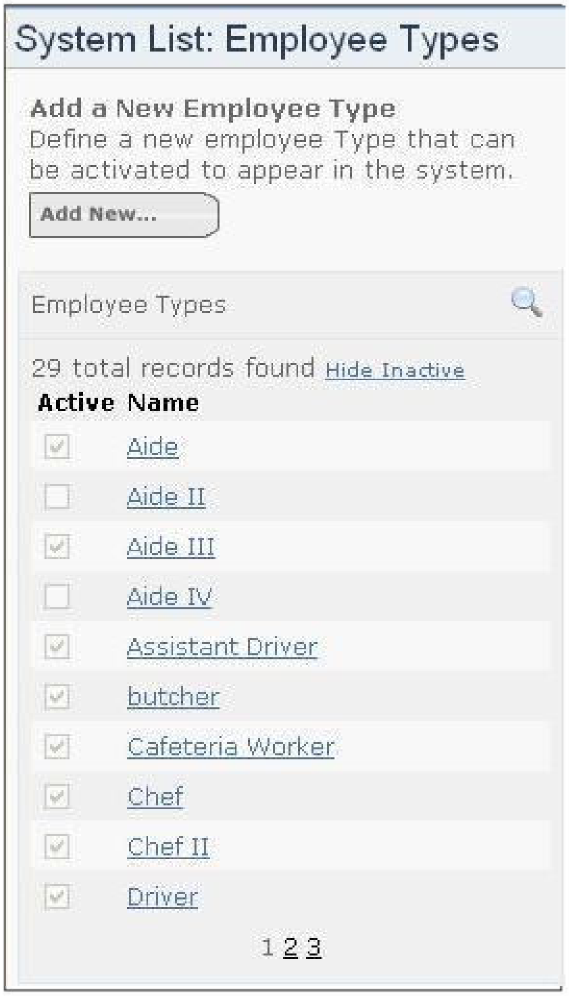
Adding an Employee Type and Associating Certifications

You should set up the certification and employee type information before adding employee records. If you do not set up these records first, they will not be available to associate with an employee type. Once you have completed your employee type records, you can create the individual employee records for your employees or use those available in Routing & Planning and/or Fleetvision.

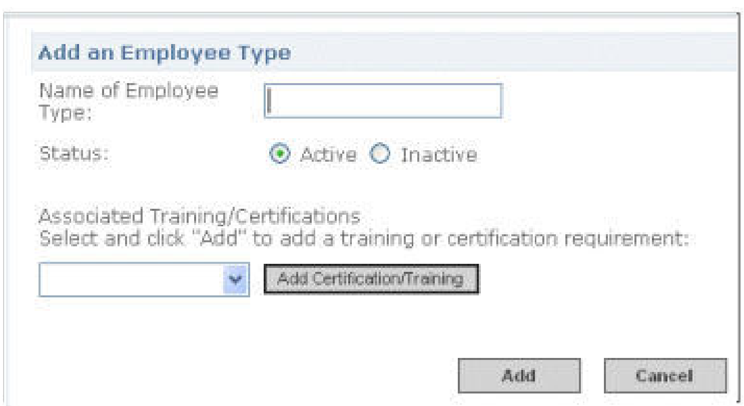
To add an Employee Type:

Path:) Admin > System Lists > Employee Types

1. Follow the above path to display the System List: Employee Types screen.



2. Click   to display a blank record.



3. Enter the name of the employee type in the Name of Title field.

   Select **Active** for the status. Employee Types which have been checked as Active will appear for selection in drop-down lists throughout the application.

4. To add a certification requirement. Select a certification from the drop-down list and click 

.

5. Repeat step 4 for each certification type that you want associated with this employee type.

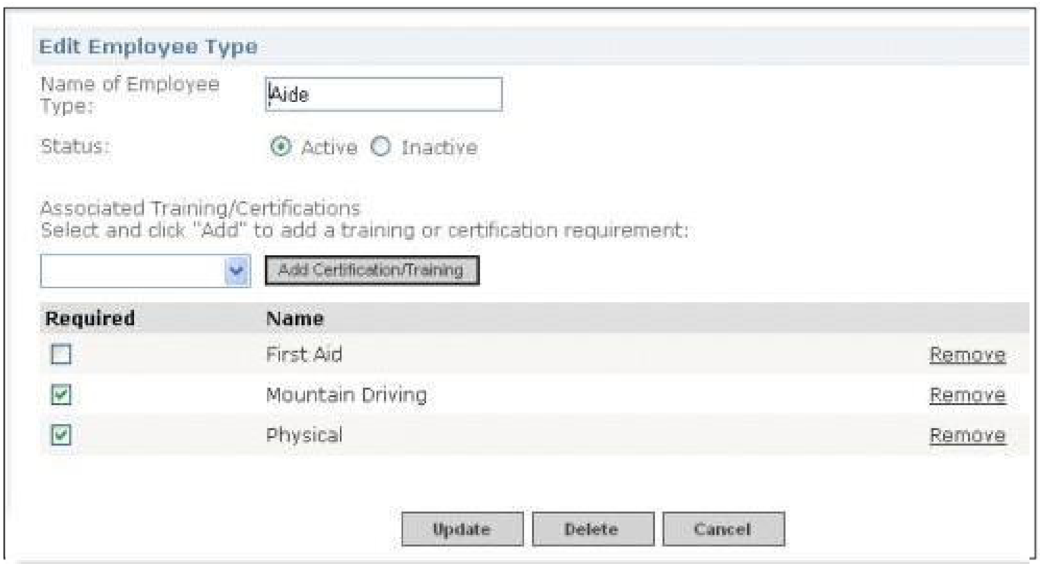
Editing an Employee Type

Remember, if there are new certifications required for an employee, you must add them in the Certifications section first. See *Setting Up Certification Records* on page 49 for these instructions.

To edit an employee type:

Path:) **Admin > System Lists > Employee Types**

1. Click  to display the blank search panel.
2. Enter an employee type in the **Search On** field. As you enter the employee type, the system will display a list of employee types containing the text entered.
3. Select an employee type to display the Edit Employee Type screen.



4. You can change the name and status of the employee type.
5. You can assign additional certification types for the selected employee type. See, *Adding an Employee Type and Associating Certifications* on page 58.
6. Check **Required** next to the certifications that are required.
7. You can remove a certification type by clicking Remove.
8. You can delete the selected employee type by clicking
9. After you complete your changes, click to save your changes.

Deleting an Employee Type

To delete an employee type:

Path:) Admin > System Lists > Employee Types

1. Click to display the blank search panel.
2. Enter an employee type in the **Search On** field. As you enter the employee type, the system will display a list of employee types containing the text entered.
3. Select an employee type to display the Edit Employee Type screen.
4. Click Delete.

5. Click **OK** to delete the employee type record. The record is deleted and its name is removed from the Employee Types list.

Showing Inactive Employee Type Records in the Employee Types List

Only the "active" employee type records display in the employee type list. You have the option of displaying the "Active" and "Inactive" employee type records in the employee type list.

To show active and inactive employee type records in the employee types list:

Path:) Admin > System Lists > Employee Types

➢ Click Show Inactive in the Employee Types screen to show the active and inactive records.

Setting Up Job Categories

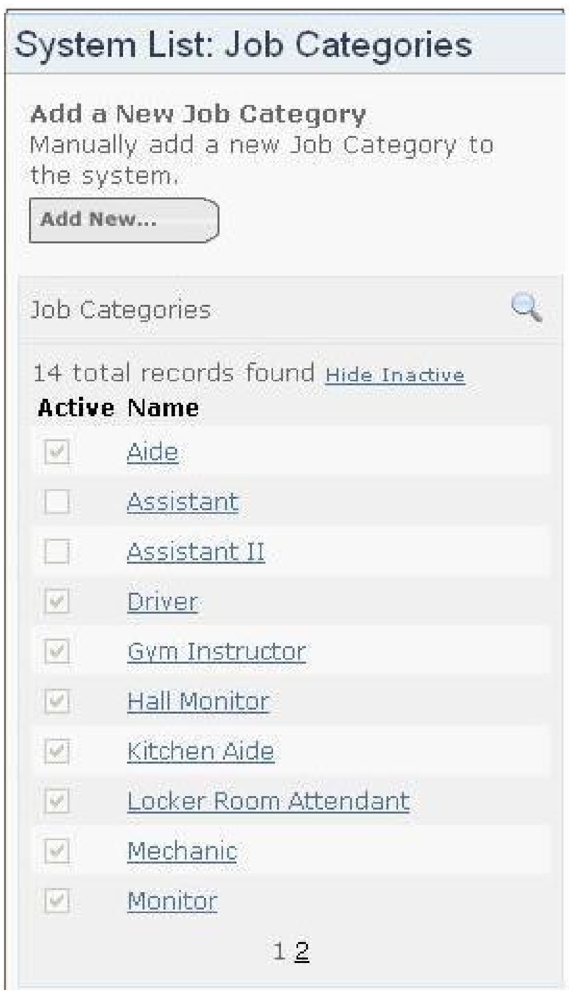
Job categories are used for setting up pay criteria within Employees records. They include the job category description and a pay code. These values will be available to you in the employee's records in the salary detail section.

Adding a Job Category

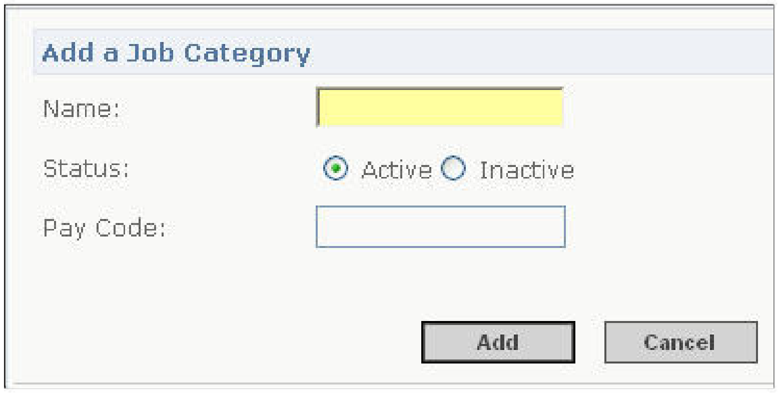
To add a job category:

Path:) **Admin > System Lists > Job Categories**

1. Follow the above path to display the System List: Job Categories screen.



2. Click to display a blank record.



3. Enter the name of the Job Category in the Name field.
4. Select **Active** for the status. Job categories which have been checked as Active will appear for selection in drop-down lists throughout the application.

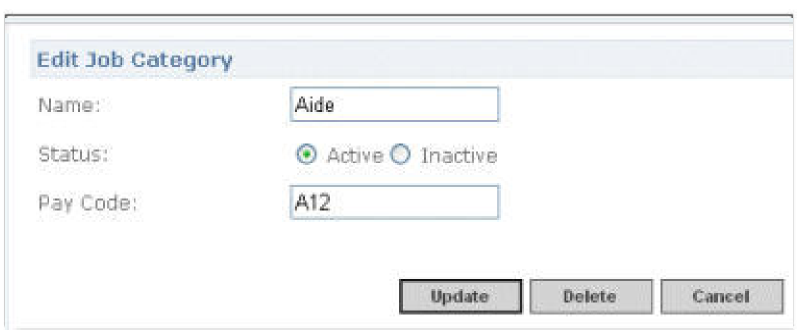
   You can optionally enter a Pay Code in the Code field. "Pay Code" is an optional category for reporting. This is a code associated with the specific job category.
5. Click  to add the new job category.

Editing a Job Category

To edit a job category:

Path:) **Admin > System Lists > Job Categories**

1. Click  to display the blank search panel.
2. Enter a job category in the **Search On** field. As you enter the job category, the system will display a list of job categories containing the text entered.
3. Select a job category to display the Edit Job Category screen.



4. You can change the name, status and pay code.

5. You can change the status to ACTIVE or INACTIVE.

   Job Categories which have been checked as ACTIVE will appear for selection in drop-down lists throughout the application.

   If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive certification name will no longer be actively tracked.

6. After you complete your changes, click Update to save your changes.

Deleting a Job Category

To delete a job category and pay code:

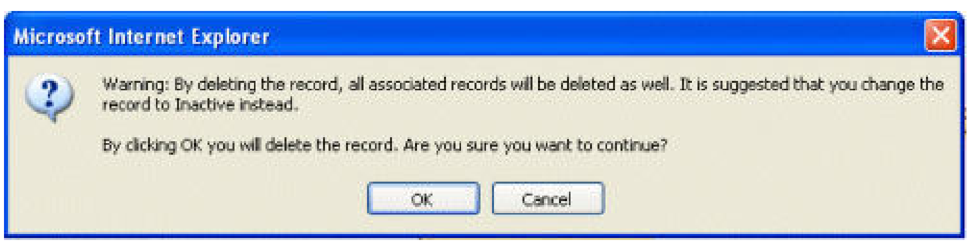
Path:) Admin > System Lists > job Categories

1. Click  to display the blank search panel.

2. Enter a job category in the **Search On** field. As you enter the job category, the system will display a list of job categories containing the text entered.

3. Select an job category to display the Edit Job Category screen.

4. Click Delete .



5. Click **OK** to delete the job category record. The record is deleted and its name is removed from the Job Categories list.

Deactivating a Job Category

To deactivate a job category:

Path:) **Admin > System Lists > Job Categories**

1. Click  to display the blank search panel.
2. Enter a job category in the **Search On** field. As you enter the job category, the system will display a list of job categories containing the text entered.
3. Select an job category to display the Edit Job Category screen.
4. Click ◉ Inactive in the Status field.
5. Click **Update** to save your changes.

Showing Inactive Job Category Records in the Job Categories List

Only the “active” job category records display in the job category list. You have the option of displaying the “Active” and “Inactive” job category records in the job category list.

To show active and inactive job category records in the Job Categories list:

Path:) **Admin > System Lists > Job Categories**

➢ Click Show Inactive in the Job Categories screen to show the active and inactive records.

Setting Up Drug Test Types

Depending on the rules at your district, there may be several different tests that employees are required to take either on a random or fixed schedule. Either illicit or prescribed testing may be done.

This section is optiona.l If you already track drug test results in another place. There is no need to duplicate the effort and Triptracker does not require this data to be entered to function properly.

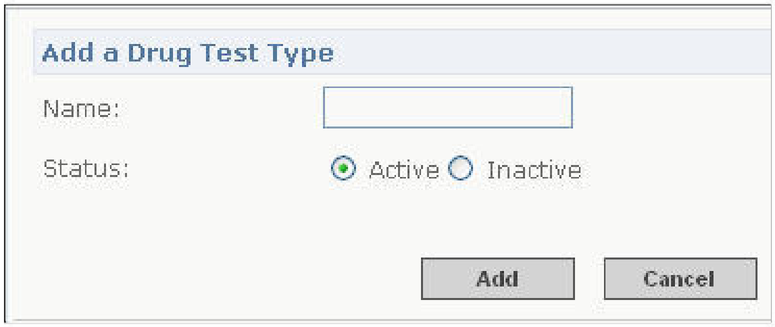
Adding a Drug Test Type

To add a drug test type:

Path:) **Admin > System Lists > Drug Test Types**

1. Follow the above path to display the System List: Drug Test Types screen.

2. Click to display a blank record.



3. Enter the name of the drug test in the Name field.
4. Make sure that the Active check box is checked.
5. Click 

to add the new drug test type. The new drug test type appears on the Drug Test Types list.

Editing a Drug Test Type

To edit a drug test type:

Path:) Admin > System Lists > Drug Test Types

1. Click  to display the blank search panel.
2. Enter a drug test type in the **Search On** field. As you enter the drug test type, the system will display a list of job drug test types containing the text entered.
3. Select a drug test type to display the Edit Drug Test Type screen.

4. Make the desired changes in the associated fields.
5. You can change the status to ACTIVE or INACTIVE.

Drug Test Types which have been checked as ACTIVE will appear for selection in drop-down lists throughout the application.

If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive certification name will no longer be actively tracked.

6. After you complete your changes, click to save your changes.

Deactivating a Drug Test Type

You can deactivate a drug test type so it doesn't display as an option in the future.

To deactivate a drug test type:

Path:) Admin > System Lists > Drug Test Types

1. Click to display the blank search panel.
2. Enter a drug test type in the **Search On** field. As you enter the drug test type, the system will display a list of job drug test types containing the text entered.
3. Select a drug test type to display the Edit Drug Test Type screen.
4. Click Inactive in the Status field.
5. Click Update to save your changes.

Showing Inactive Drug Test Type Records in the Drug Test Types List

Only the "active" drug test type records display in the drug test type list. You have the option of displaying the "Active" and "Inactive" drug test type records in the drug test type list..

To show active and inactive drug test type records in the Drug Test Types list:

Path:) Admin > System Lists > Drug Test Types

- Click Show Inactive in the Drug Test Types screen to show the active and inactive records.

Working with Employee Records

Now that you have your certifications records established and set up the employee types (with the assigned certifications records), you are ready to enter employee records themselves. You must complete the certification and employee type records (see, *Setting Up Certification Records* on page 49 and *Setting Up Employee Types* on page 58) before you can add the employee records themselves.

Adding an Employee Record

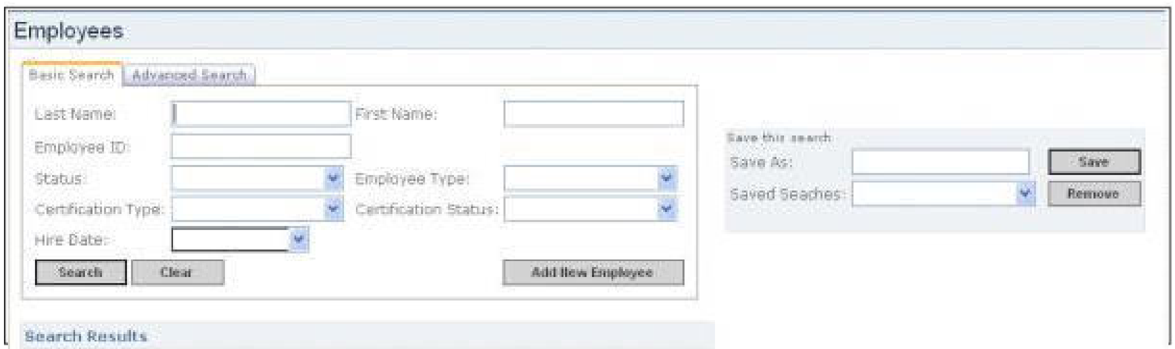
Employees may include all of the Transportation department workers who have responsibilities for trips as well as other district workers as needed.

Note: *You can "import" the employee data if you have files with a fixed or delimited format. See, Importing Buildings, Vehicles, Employees, etc. on page 294.*

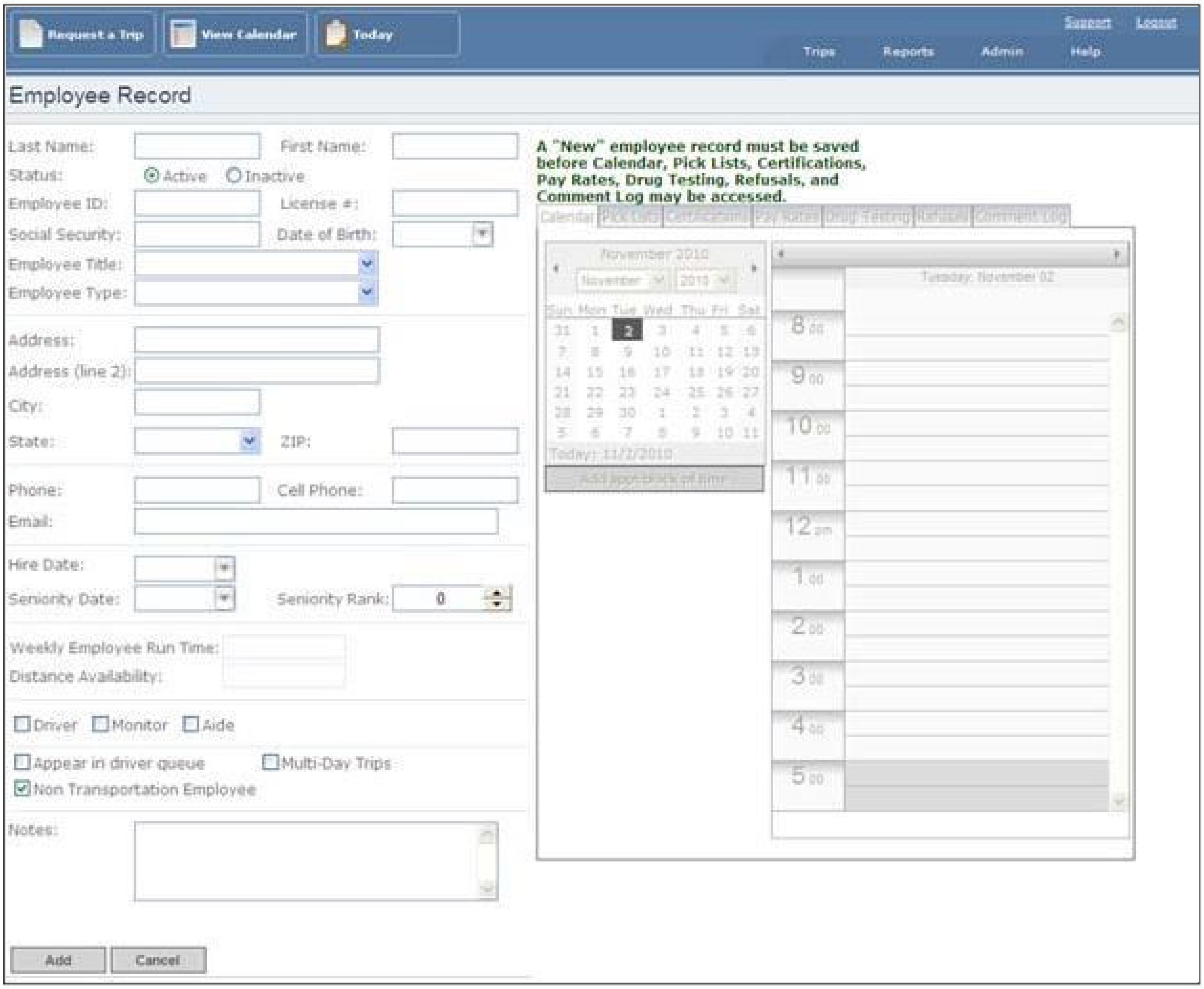
To add an employee record:

Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.



2. Click **Add New Employee** to display a blank Employee Record screen.



Note: *If you have Routing & Planning and Fleetvision, the building, vehicle, and employee data is shared. Any edits, adds, or deletes that are made here will impact your Routing & Planning and Fleetvision data.*

3. Complete the blank fields in this screen including the tabs, until all of the information your organization requires is complete. Most of these fields are self-explanatory. If you have questions about the appropriate entries for this screen, see the field descriptions below.

Note: *A "new" employee record must be saved before the tabs can be accessed and information added.*

First Name/Last Name
Type the employee's name in the appropriate fields.

Employee ID
Type the employee's ID in this field.

Enterprise ERP Integration
When setting up employee records, you need to make sure the employee ID's that you enter in Triptracker are an **"exact match"** to the employee ID's you are using in Enterprise ERP. The person(s) setting up Enterprise ERP should be able to tell whoever is setting up Triptracker what the Enterprise ERP employee ID's are or will be. An integration failure will result if this procedure is not followed.

License #
Type the employee's drivers license number in this field.

Social Security #
Type the employee's social security number in this field.

Employee Title
Use the drop-down list to select the employee title for this employee. The employee title entries you have made display in this list.

Employee Type
Use this drop-down list to select the employee type for this employee. The employee type entries you have made display in this list.

Hire Date
Select the employee's hire date from the drop-down calendar.

Seniority Date
This is the date seniority tracking begins. If you want this employee to use a different date other than the date of hire for seniority purposes, select that date from the drop-down calendar.

Seniority Rank
If you want to list employees in a particular order based on seniority, enter this employee's number in this field.

Weekly Employee Run Time
The number of hours per week that the driver is scheduled for regular runs.

Distance Availability
This is the maximum trip distance that a driver will accept. Distance availability is used in automated driver assignment.

Active/Inactive
Employees with an Active status will appear for selection in drop-down lists throughout the application.

Driver/Monitor/Aide
Check the boxes that apply to the employee.

Appear in Driver Queue
Check to allow drivers to be assigned to automatic Pick Lists and/or to assign drivers to specific accounts.

Non Transportation Employee
Check this box if the employee is not involved in Transportation.

Multi-Day Trips
Checking this box indicates that a driver is available for multi-day trips. This information is used in automated driver assignment.

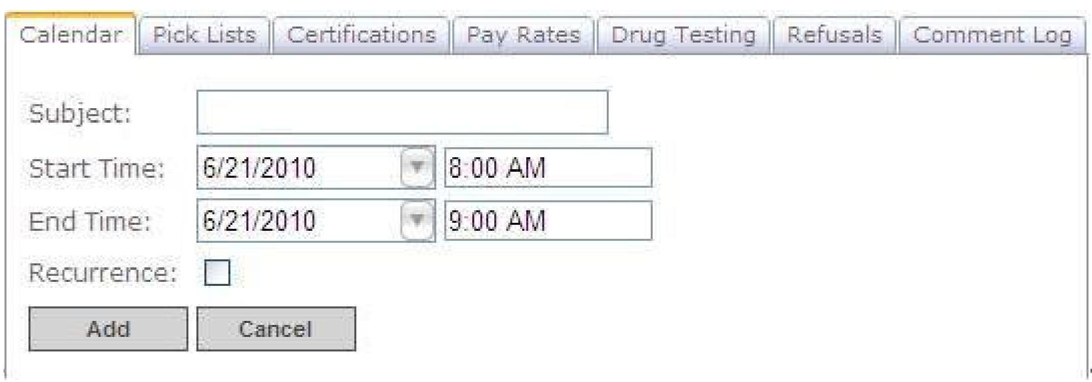
Entering a Range of Time for When an Employee is Unavailable

To enter a range of time for when an employee is unavailable:

Path:) **Admin > Employees**

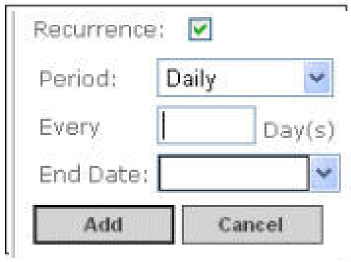
1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 83.
3. Click 

to enter a range of time for when an employee is unavailable.

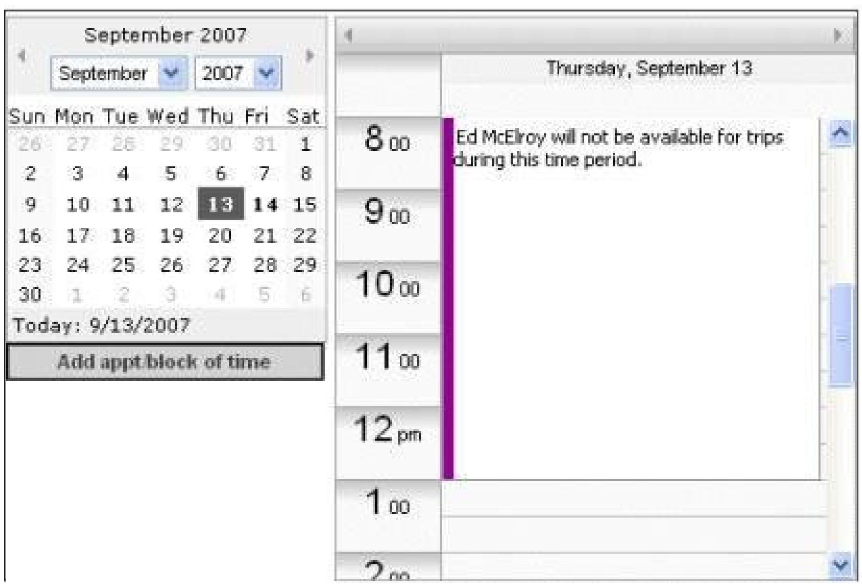


4. Type the reason for an employee not being available in the **Subject** field.
5. Use the drop-down calendar to select the start/end dates and times.

6. Check **Recurrence** when you want to log recurring unavailable time for an employee.



7. Enter the Period (Daily, Every Weekday, Weekly, Monthly, or Yearly).
8. If you selected Daily or Every Weekday, enter the number of days in the Every __ Day(s) field. Weekly, enter the number of weeks. Monthly, enter the number of months. Yearly, enter the number of years.
9. Enter the date or select the date the recurrence will end in the End Date field.
10. Click to add the recurrence to the calendar.
11. Click and the selected dates and times are blocked off on calendar.



Note: *The dates and times that an employee is unavailable is used when assigning a driver to a trip. If the trips falls within a driver's unavailable time, the user will get a message that the driver is unavailable.*

Adding Drivers or Monitors/Aides to a Pick List

Users who are a member of a group that has the permission Employees: Edit Pick List and Super Users can add employees to a Pick List via the Employee Record screen. A Pick List must exist before employees can be added, see *Creating a Pick List for Drivers or Monitors/Aides* on page 116.

To add drivers or monitors/aides to a Pick List via the Employee Record screen:

1. Click on the "Basic Search" tab.
2. Perform a search to locate the employees whose records you want to work with.
3. Click on the employee that you want to add to a Pick List to display the Employee Record screen.
4. Click the **Pick List** tab.

Lists manually created by users Lists automatically created by system

Manual Pick List PanelAutomatic Pick List Panel

There are two types of Pick Lists, manual and automartic. Manual Pick Lists are created by the user and employees can be manually added or removed by the user. Automatic Pick Lists are created by the system and employees are added or removed when certain criteria is checked on the employee's record (see below).

All the manual Pick Lists that were created by the user are listed in the "Manual Pick Lists" panel. The "Automatic Pick Lists" panel will only display Pick Lists if the following driver and/or monitor/aide criteria is checked on the employee's record.

Drivers
"Active", "Driver", "Qualify for activity vehicle", and "Appear in driver queue" checkboxes checked.

Monitors/Aides
"Active" and either the "Monitor" or "Aide" checkbox checked.

The system compares this criteria from the employee record with the Drivers or Monitors/Aides criteria checked on the Pick List Setup screen. The automatic Pick Lists are then displayed accordingly. For infomation on selecting automatic Pick List criteria, see *Creating a Pick List for Drivers or Monitors/Aides* on page 116.

5. In the “Manual Pick Lists” panel, check the boxes next to the Pick Lists that you want the employee added to.
6. If the employee meets the Pick List criteria for automatic Pick Lists, you can either change the “Driver”, “Monitor”. or “Aides” criteria to relocate the employee to a different automaic Pick List or you can uncheck the criteria to remove the empolyee from automatic Pick Lists.

   Note: *You cannot select or unselect Pick Lists in The “Automatic Pick List” panel. This panel only serves as a list of automatic Pick Lists associated with the employee.*

7. Click **Update** to update the employee record. Changes to the automatic Pick Lists will display in the “Automatic Pick Lists” panel.

Note: *Additions and deletions of employees to and from Pick Lists will also be reflected on the Pick List screen.*

Viewing & Updating an Employee’s Certification Information

Certification information is assigned to employee types, see *Adding an Employee Type and Associating Certifications* on page 58. Different employee types may require different certifications. For example, a driver may be required to have CPR, Mountain Driving, and First Aid certifications. The Certifications tab allows you to view employee certification information (i.e. Certifications, Required, Completion Date, Expiration Date, and Status) relating to that employee’s type. You can also edit the completion and expiration dates for that employee’s certification.

To view and update an employee’s certificating information:

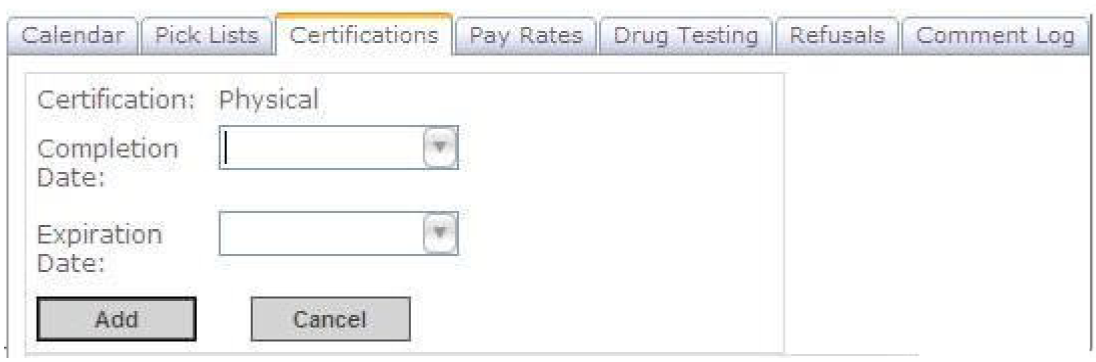
Path:) Admin > Employees

1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee’s Record Using the Basic Search* on page 83.

3. Click Certifications to display the employee's certification information.

When you added a new certification (see, *Adding Certification Records* on page 49) you entered a number of look ahead days. When the employee's certification is within that look ahead number of days, the system highlights the entry in this screen in yellow and displays the *Coming Due* label in the Status column. If the number of look ahead days is passed, the Status column entry reads *Overdue* and the system highlights the entry in red. Certifications that are missing say *Missing* in the Status colum and are also displayed in red. When you update/edit the certification entries for the employee, the red highlight disappears.

4. Click Edit for the certification that you want to update.



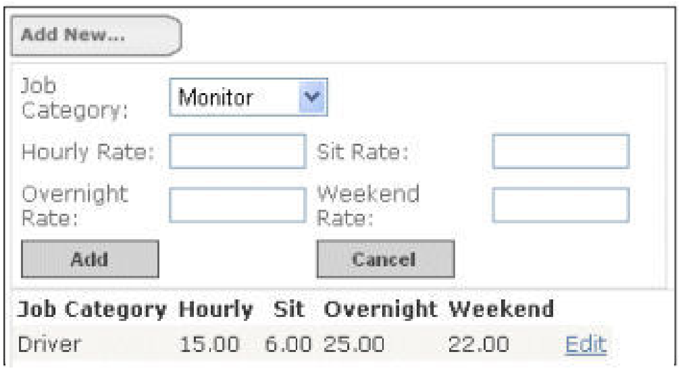
5. Either enter a completion and expiration date or click to select the dates from the calendar.
6. Click Add to update the selected certification's completion and expiration dates.

Entering an Employee's Pay Rate Information

To enter an employee's pay rate information:

Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 83.
3. Click Pay Rates . and then click Add New... , the system displays the Pay Rate Entry box.



4. Select the employee's job category from the drop down list.
5. Enter the appropriate pay rate amounts in each of the rate fields.
6. Click the Add button. The pay rates entered are displayed.

Job Category	Hourly	Sit	Overnight	Weekend	
Driver	15.00	6.00	25.00	22.00	Edit

7. Click Edit to update the employee's pay rate.

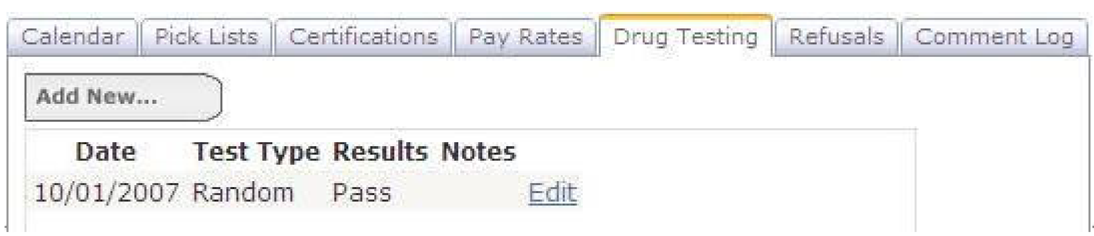
Entering an Employee's Drug Testing Information

To enter an employees drug testing information:

Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 83.
3. Click Drug Testing and then click Add New..., the system displays the Drug Testing Entry box.

4. Select the test name from the drop down list. See, *Setting Up Drug Test Types* on page 66.
5. Either enter a test date or click to select a date from the calendar.
6. Enter the results and notes in the corresponding fields.
7. Click the Add button. The drug test information is displayed.



8. Click Edit to update the drug test information.

Viewing an Employee's Trip Refusal Information

To view an employee's trip refusal information:

Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 83.
3. Click Refusals to review the employee's field trip refusals.

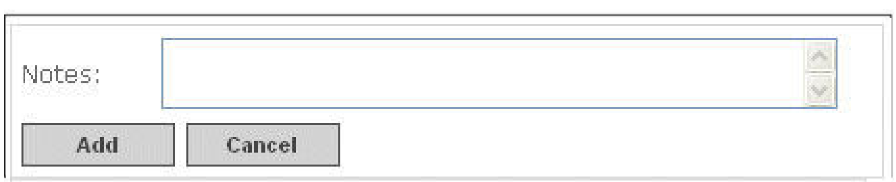
4. This is not applicable when you enter an employee initially, since this tab displays trips this employee has refused. You cannot enter trip refusals here.

Using the Comment Log

To use the comment log:

Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 83.
3. Click Comment Log and then click Add New..., the system displays the Comment Entry box.



4. Enter your comments into the Notes field and click Add. The comments entered are displayed.

Finding & Editing an Employee's Record

You can use the basic or advanced search methods to find an employee's record and edit that employee's record in the Triptracker system. Finding an employee's record largely depends upon what criteria you know when you begin the search.

Finding and Editing an Employee's Record Using the Basic Search

To find and edit an employee's record using the basic search:

Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.

2. Click the Basic Search tab.

3. Clicking the Search button without entering information will display all employee's records.

4. For a specific employee, enter the information or select the employee information from drop-down lists.

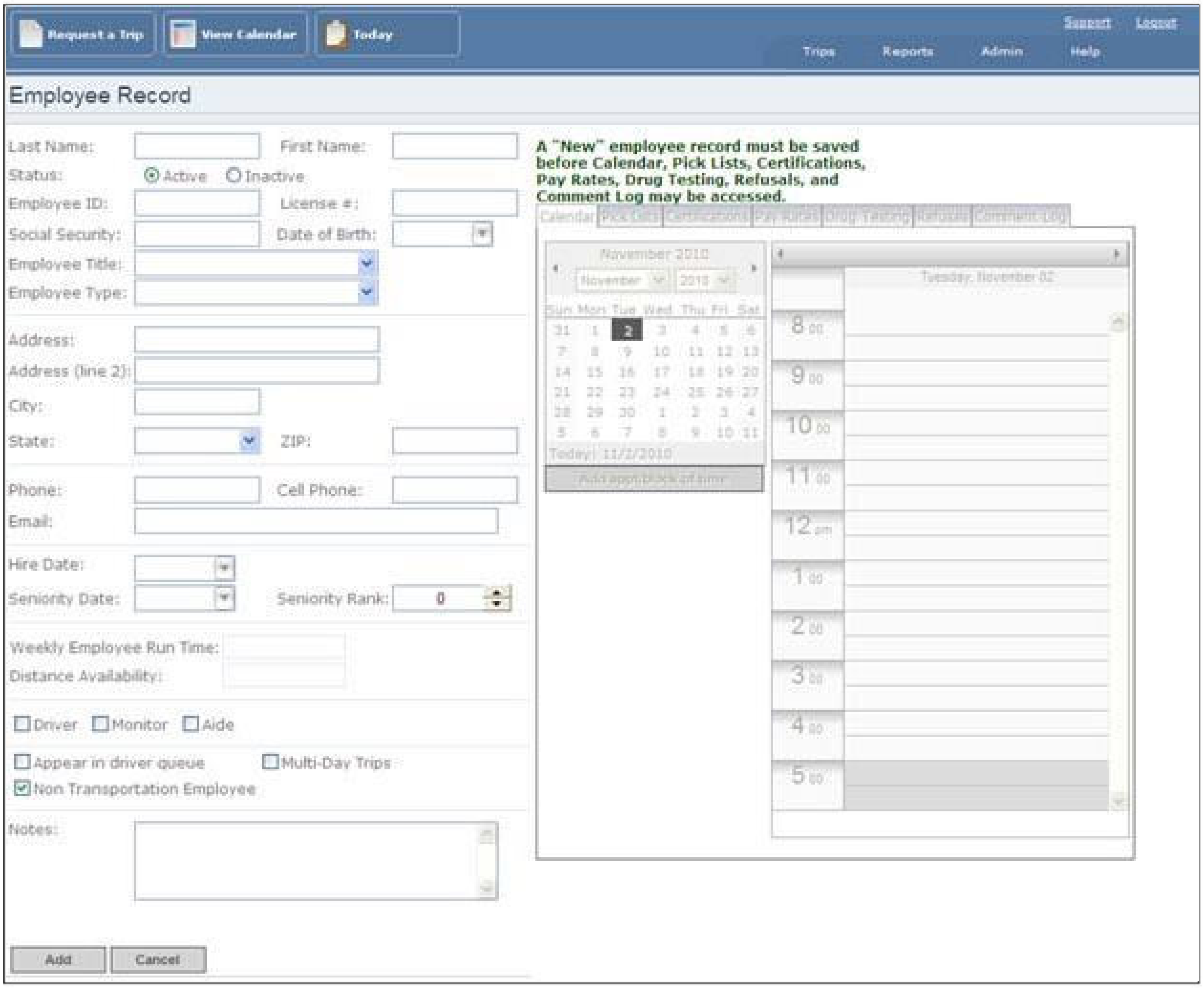
5. Click Search to display the employee's search results.

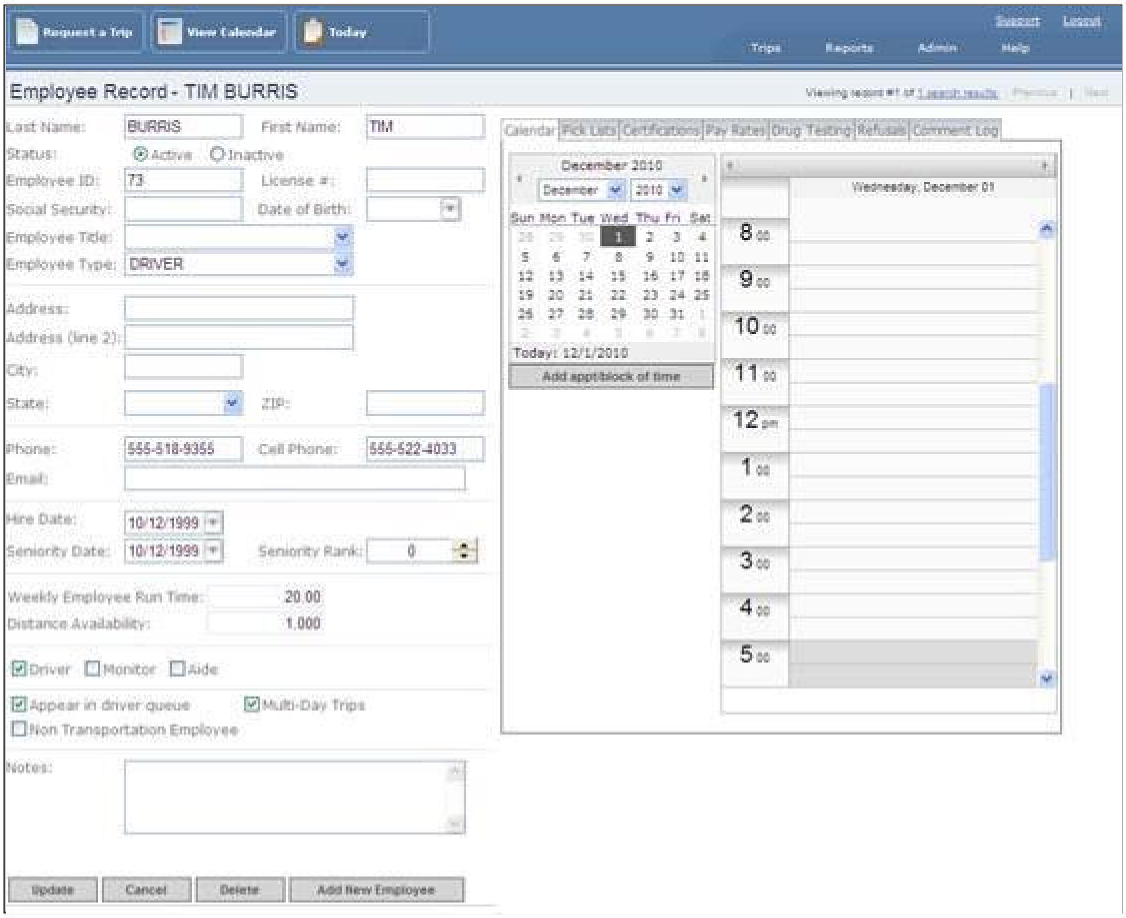
Search Results   Print Search Results

Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date	Requester
1122	Requested	newmessage1		Adams ES	2/2/2015	Crannell, Rory
1116	Requested	rcranneltrip1clone		Adams ES	1/30/2015	Crannell, Rory
1119	Requested	blocked time 3		Adams ES	1/26/2015	Crannell, Rory
1118	Requested	Blocked Time 2		Adams ES	1/15/2015	Crannell, Rory
1117	Requested	Block Time 1		Adams ES	1/15/2015	Crannell, Rory
1113	Requested	RCdemotrip2		Adams ES	1/7/2015	Esquibel, Maria
106	Requested	commentbox1		Adams ES	12/29/2014	Esquibel, Maria
111	Requested	Museum Tour		Adams ES	12/15/2014	Gordon, Bill
110	Requested	ed trip		Adams ES	12/11/2014	Esquibel, Maria
97	Requested	test2new3clone		Craig HS English	10/31/2014	Crannell, Rory

1 2 3 Next

6. Click on the Employee name to display the Employee Record screen.





7. Click Cancel to return to the Employees Screen

   OR,

8. You can edit the employee record by either entering new information or selecting information from drop-down lists.

9. When you are finished editing the employee record click   .

10. Click **Cancel** to return to the Employees Screen.

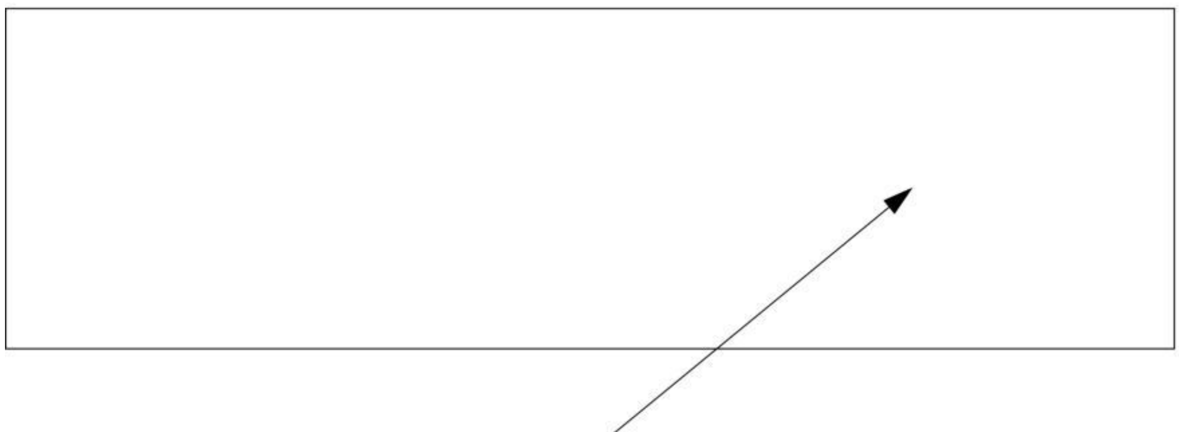
Saving an Employee Search & Using a Saved Employee Search

You can save any number of employee searches and they will be added to a list for later use.

To save an employee search and then use the saved search:

Path: **Employee Search**

1. Follow the above path to display the Employee's Search screen.
2. Click the Basic Search tab.
3. Set up and run an employee search as described in *Finding & Editing an Employee's Record* on page 83*Finding & Editing an Employee's Record*.



Save Search Panel

4. In the Save Search panel, enter a name for the search in the Save as field.
5. Click 

. The search is added to a list accessible from the Saved searches drop-down button.
6. Click the Saved Searches drop-down button to display a list of saved searches.
7. Select the desired search from the list and click **Search**.

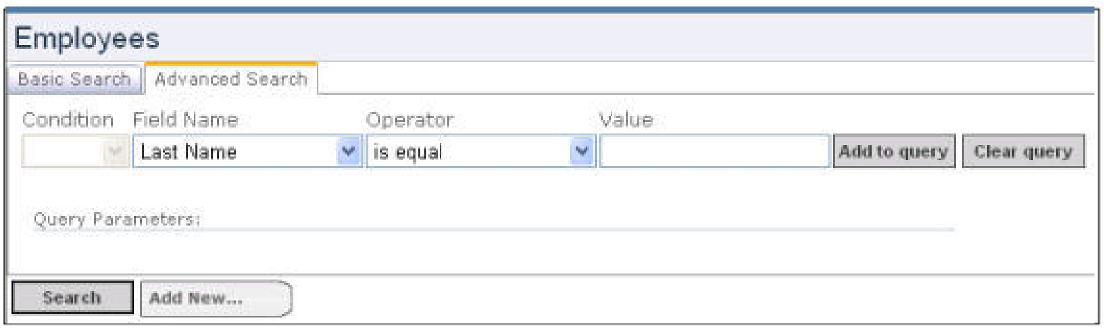
Finding & Editing an Employee's Record Using the Advanced Search

If you want to enter more specific criteria, use the advanced search. The advanced search gives you more options in choosing criteria by introducing an operator, such as is equal, not equal, less than, and is between.

To find and edit an employee's record using the advanced search:

Path:) **Admin > Employees**

1. Follow the above path to display the Employee's Search screen.
2. Click the **Advanced** search tab.



3. Select the field you want to search on from the **Field Name** drop-down list.
4. Select an operator for this criterion from the Operator drop-down list. Operators include: **is equal, not equal, less than, less than or equal, greater than, greater than or equal, is between, is in,** and **is not in**.
5. Click **Add to Query**. The Condition field becomes active allowing you to select a condition (AND or OR) and if desired, continue entering criteria to the query. The following is an example of a query with 2 sets of criteria.

6. When you are finished entering criteria, click Search. The Search Results panel displays the employee(s) that match the query.

7. Click on the Employee name to display the Employee Record screen.

Search Results

Employee ID	Employee Name	Status	Home Phone	Employee Type
090	McElroy, Edward	Active	518-533-1837	EMT XI

8. Click Cancel to return to the Employees Screen

OR,

9. You can edit the employee record by either entering new information or selecting information from drop-down lists.

10. When you are finished editing the employee record click .

11. Click Cancel to return to the Employees Screen.

Setting Up Building Records

If you are currently working with Routing & Planning, you have probably set up most of the building records for Triptracker. Buildings can either be entered manually or imported into Triptracker. See, *Importing Buildings, Vehicles, Employees, etc.* on page 294.

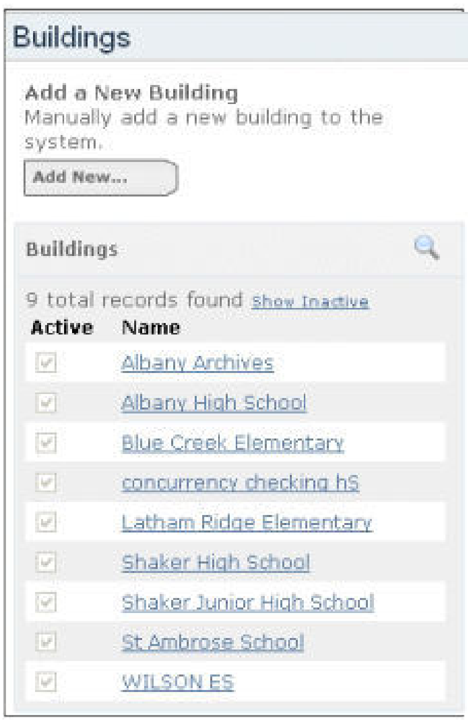
Manually Adding a Building Record

You need to enter a record for each building that is part of your district. The Bus garage and all the schools plus any other facilities that would constitute a point of origin must be entered.

To manually add a building record:

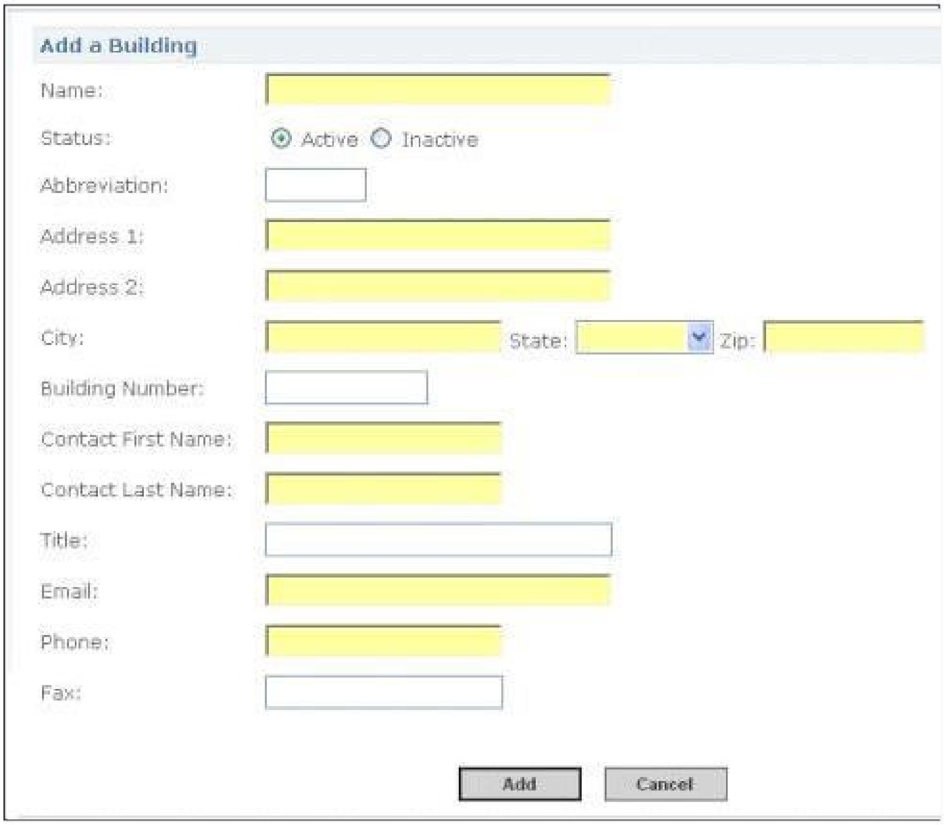
Path:) **Admin > Building**

1. Follow the above path to display the Buildings screen.



2. Click 

.



3. Complete the fields in this screen. Most of the fields are self explanatory.

   Building Number (required)
   Enter a build number to identify a building.

4. When you have completed these entries, click to save the new record.
5. You can continue adding new records by clicking 

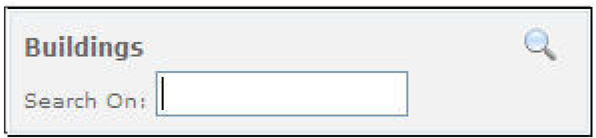
.

Editing a Building Record

To edit a building record:

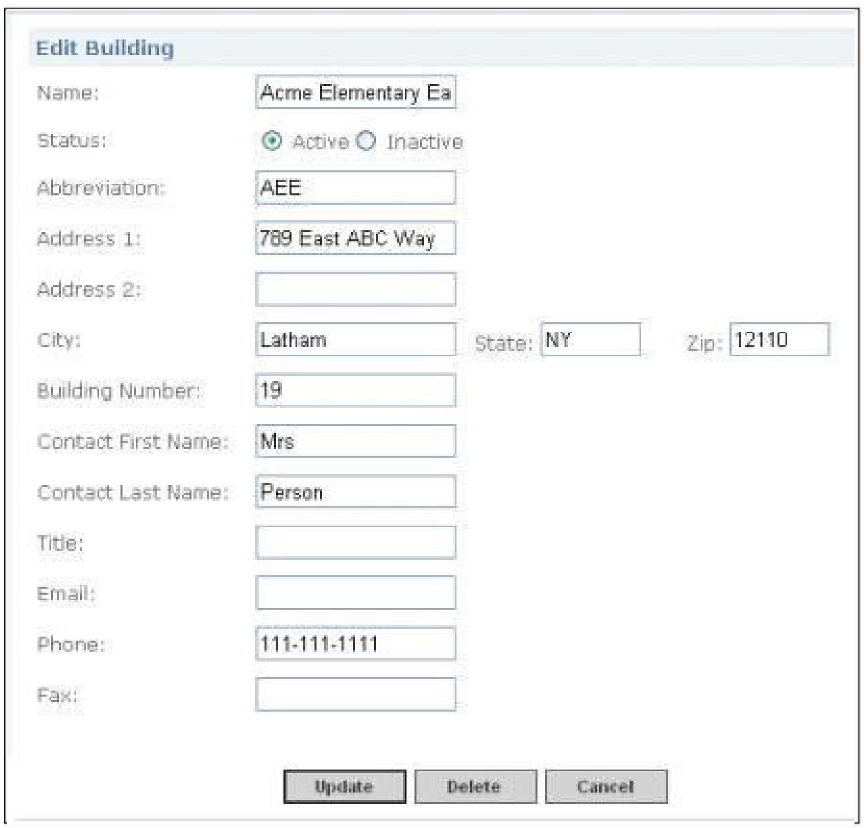
Path:) **Admin > Buildings**

1. In the Buildings screen, click  to display the blank search panel.



2. Start typing the name of the building. As you enter text, the system will display a list of buildings that comes closest to matching the text entered.

3. Click on the building to select it and display the edit building screen.



4. Place your cursor in the field you want to change the entry for and type over the existing entry.

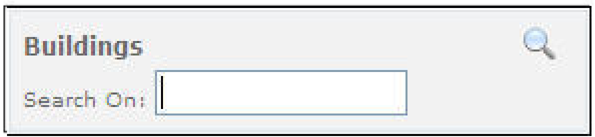
5. After you complete your changes, click to save your changes.

Deleting a Building Record

To delete a building record:

Path:) Admin > Buildings

1. In the Buildings screen, click to display the blank search panel.



2. Start typing the name of the building. As you enter text, the system will display a list of buildings that comes closest to matching the text entered.
3. Click on the Building's name to display the Edit Building screen.
4. Click Delete .
5. Click **OK** to delete the building record. The record is deleted and it's name is removed from the Active Name list.

Showing Inactive Buildings in the Building List

Only the "active" buildings display in the building list. You have the option of displaying the "Active" and "Inactive" buildings in the building list.

To show active and inactive buildings in the building list:

Path:) Admin > Buildings

- Click Show Inactive in the Buildings screen to show the active and inactive buildings.

Setting Up Vehicle Records

The Vehicle screen contains information about the vehicles in the vehicle file and about the routes each vehicle runs. Triptracker uses vehicle records to manage the vehicles your organization uses for field trips. If you are currently working with Routing & Planning and/or Fleetvision, you have probably set up most of the vehicle records. These records can also be imported into Triptracker.

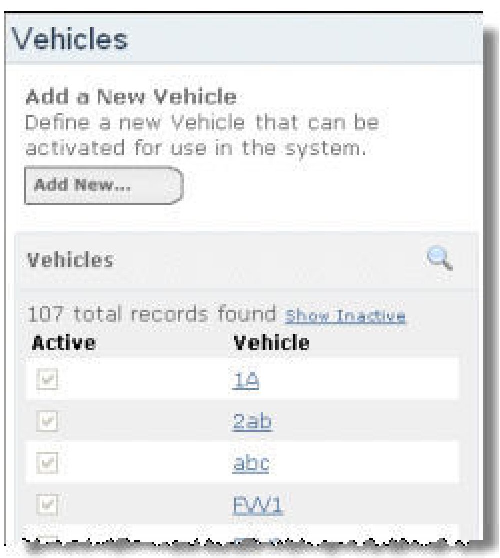
The following topics are covered in this section:

Adding a Vehicle Record

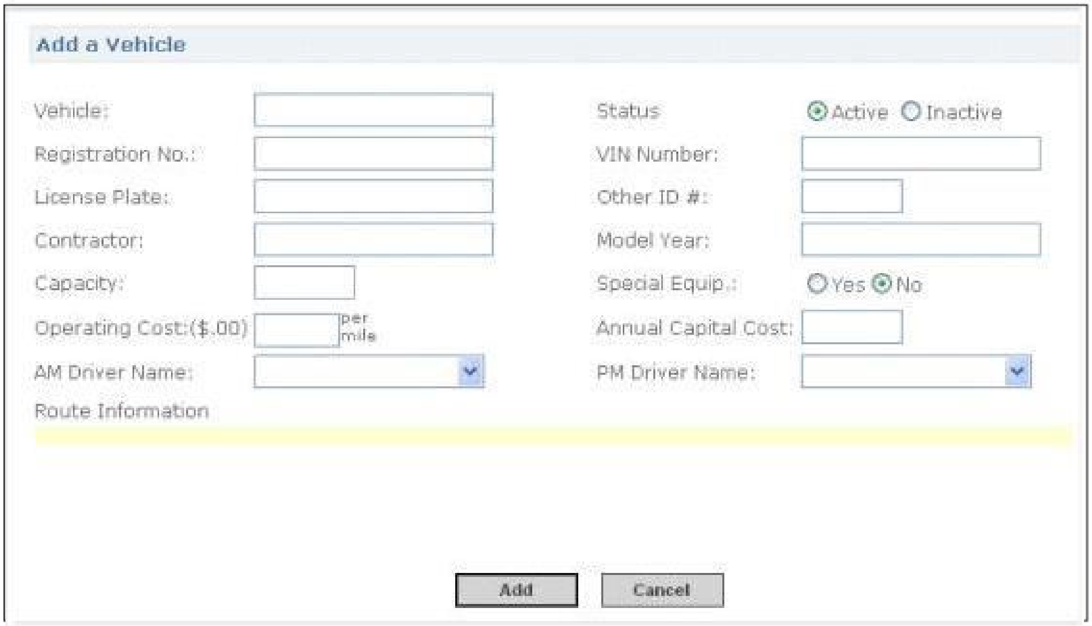
To add a vehicle record:

Path:) Admin > Vehicles

1. Follow the above path to display the Vehicles screen.



2. Click Add New... to display a blank record.



Note: *If you have Routing & Planning and Fleetvision, the building, vehicle, and employee data is shared. Any edits, adds, or deletes that are made here will impact your Routing & Planning and Fleetvision data.*

3. Type the name or number of this vehicle in the **Vehicle** field.
4. Select ACTIVE for the status. Vehicles which have been checked as Active will appear for selection in drop-down lists.
5. Complete the remaining fields selections for the vehicle record.

Registration No.
The registration number of the vehicle assigned by the Department of Motor Vehicles.

VIN Number
Enter the manufacturer's serial number for the vehicle.

License Plate
Enter the license plate number of the vehicle.

Other ID #
This field allows you to enter an additional ID number for the vehicle if applicable.

Contractor
Enter the name of the contractor.

Model Year
Enter the year of manufacture for the vehicle.

Capacity
Enter the legal capacity of the vehicle.

Special Equip.
Select **Yes** if vehicle is equipped with special equipment or **No** if it is not equipped with special equipment. Indicates vehicles with special equipment without specifically noting the special equipment.

Operating Cost
Enter the cost/mile (in cents per mile/kilometer) that represents the operating cost of the vehicle.

Annual Capital Cost
Enter the dollar amount to be assigned as this vehicle's annual capital outlay for a vehicle. When the amount appears significantly high, it may indicate a significant benefit in removing a bus from service.

AM Driver Name
Select the vehicle's driver from the drop-down list (make sure the employee record had been entered).

PM Driver Name
Select the vehicle's driver from the drop-down list (make sure the employee record had been entered).

6. Click to add the new vehicle record. The new vehicle record displays in the Vehicles screen. Assigned routes display in the Route Information panel at the bottom of this screen. See, *Viewing the Routing Information for a Vehicle* on page 97.

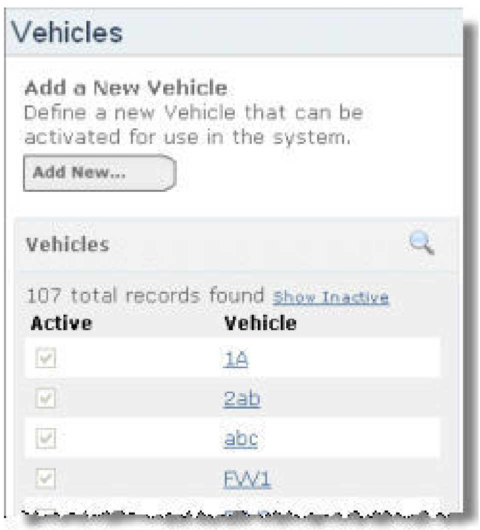
Viewing the Routing Information for a Vehicle

Some vehicle records in the Triptracker vehicle file contain assigned routes which display in the Route Information panel at the bottom of the Add and Edit Vehicle screens. You cannot make any changes in the Route Information panel.

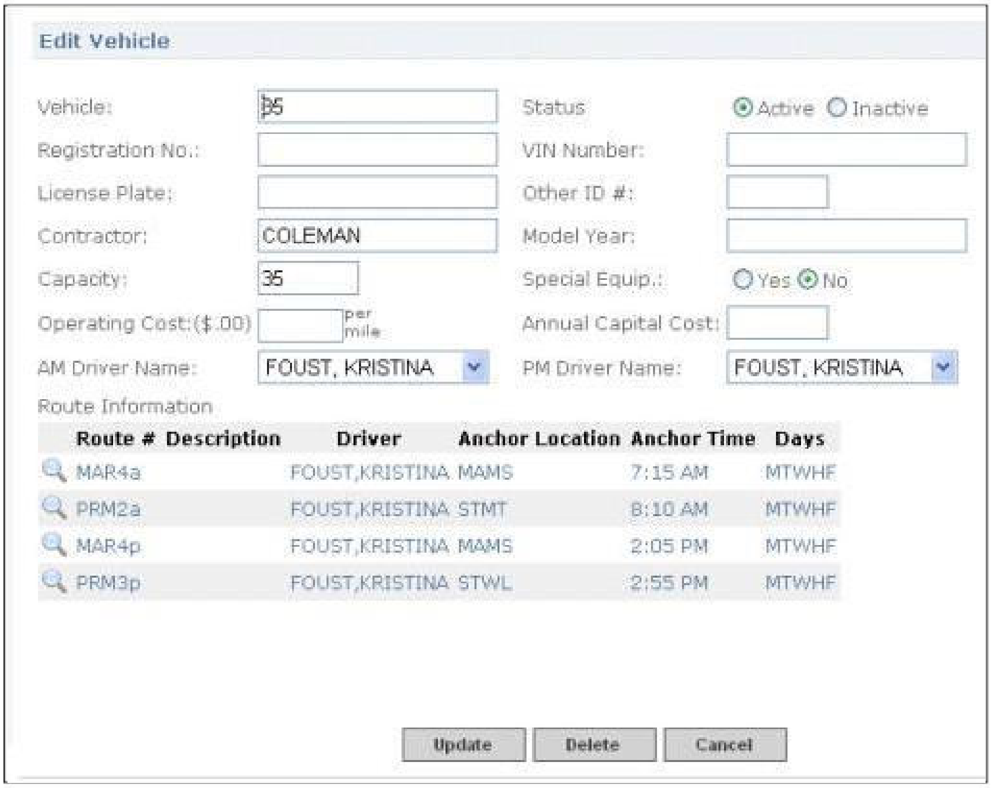
To view the routes assigned to the selected vehicle:

Path:) **Admin > Vehicles**

1. Follow the above path to display the Vehicles screen.



2. Click on a vehicle to display the Edit Vehicle screen. If routes have been assigned to this vehicle, the Route Information panel displays.

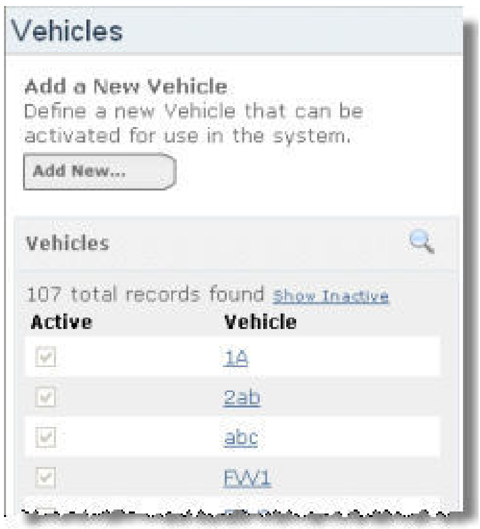


Editing a Vehicle Record

To edit a vehicle record:

Path:) Admin > Vehicles

1. Follow the above path to display the Vehicles screen.



2. Click on a vehicle to display the Edit Vehicle screen.

3. Type over the fields you want to change or make a new selection from the drop-down lists.
4. Click to add the changes to the vehicle record.

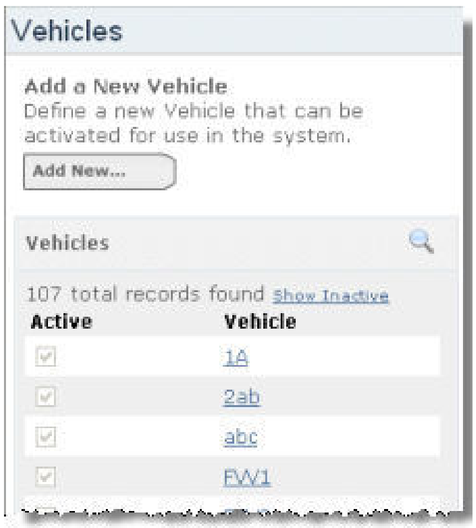
be imported into Triptracker.

Finding a Vehicle Record

To find a vehicle record:

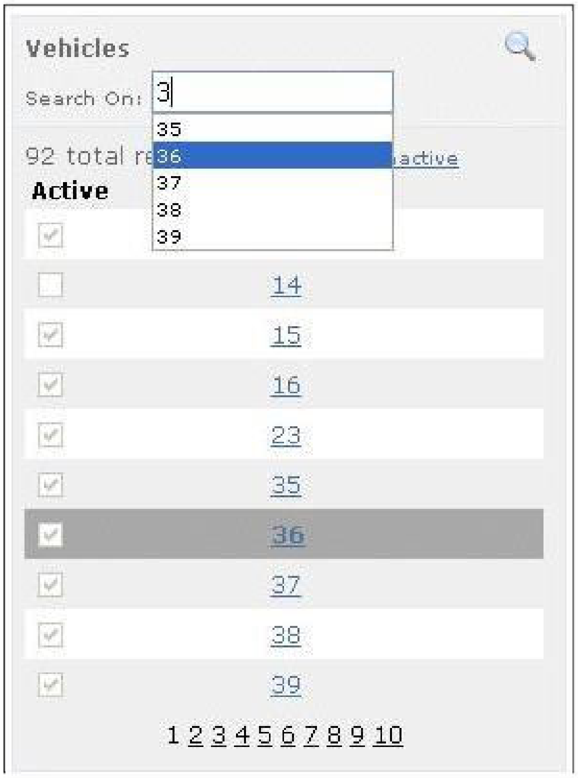
Path:) Admin > Vehicles

1. Follow the above path to display the Vehicles screen.

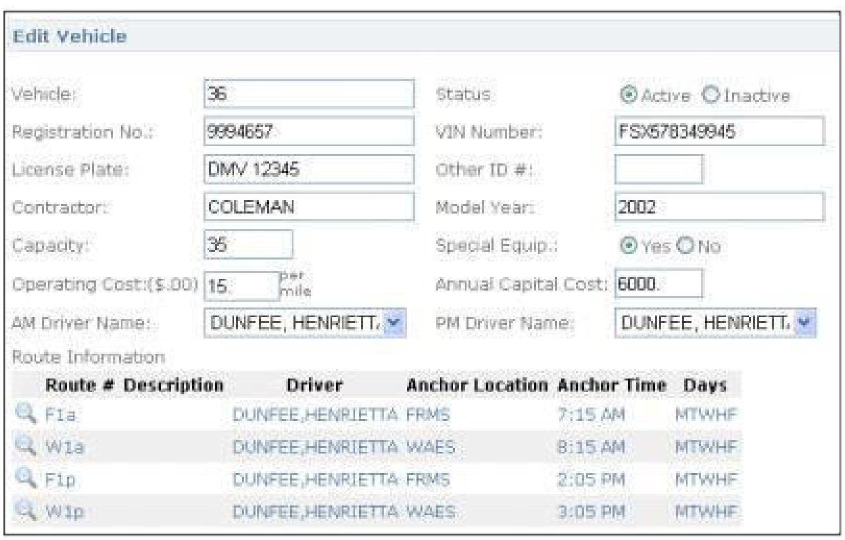


2. Click  to display the blank search panel.

3. Enter a vehicle identification number in the **Search On** field. As you enter the vehicle identification number, the system will display a list of vehicles containing the numbers entered.



4. Move the cursor over a vehicle number and right-click on that vehicle number to select it. The Edit Vehicle screen for the selected vehicle displays.



Deactivating a Vehicle Record

To deactivate a vehicle record:

Path:) **Admin > Vehicles**

1. Click  to display the blank search panel.

2. Enter a vehicle identification number in the **Search On** field. As you enter the vehicle identification number, the system will display a list of vehicles containing the numbers entered.
3. Select a vehicle to display the Edit Vehicle screen.
4. Click ⦿ Inactive in the Status field.
5. Click Update to save your changes.

Setting Up Driver Assignment Rules

The Driver Assignment Rules screen allows you to add new driver assignment rule templates and edit existing templates for ordering driver assignment lists (i.e. Driver Pick List) based on any one or a combination of rules.

For example, a district wants to award trip assignments by hours previously awarded, with rotation, but also factor in refusals. According to their procedures, 4 refusals = 1 trip, and trips average 4 hours, so for every 4 refusals, 4 hours are added to their awarded hours counts (as if they had been awarded a trip).

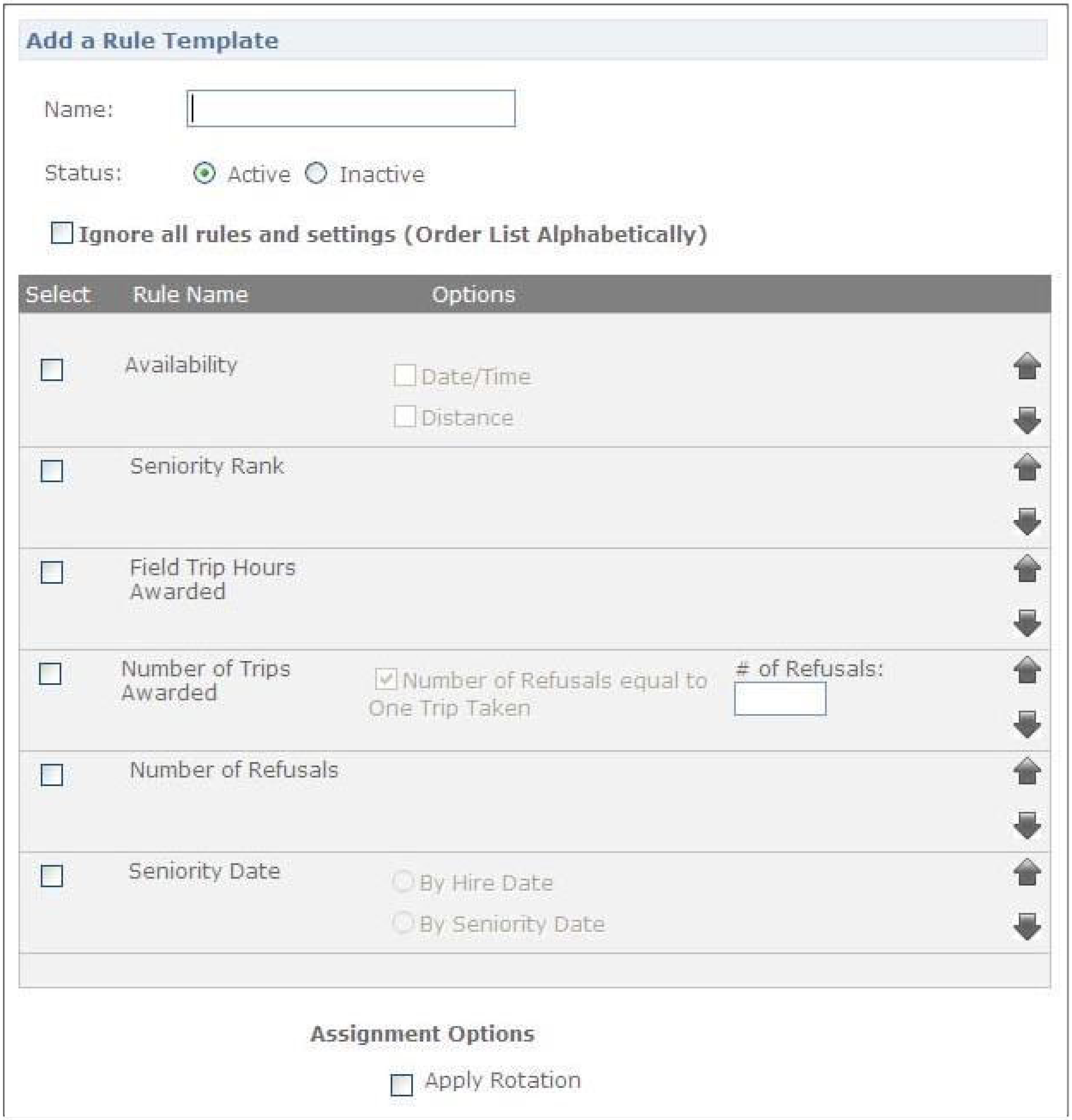
Adding Driver Assignment Rules

To add Assignment Rules:

Path:) **Admin > Driver Assignment Rules**

1. Follow the above path to display the Driver Assignment Rules screen.

2. Click **Add New** to display the Edit Rule Template Screen.



3. Enter a name for the driver assignment rules template.
4. Select **Active** for the status. Rules which have been checked as **Active** will appear for selection in drop-down lists. Rules which have been checked as **inactive** will not appear for selection in drop-down lists.
5. Click the check boxes to select the rules to use for ordering driver assignment lists.

6. Click  to move a rule up or down on the list.

   The higher the rule is on the list, the higher the priority that rule will receive.

   Allows you to choose “No Rules” as the only Driver Assignment Rules.

   Seniority Rank
   Seniority Rank is entered in the employee record, see *Adding an Employee Record* on page 72.

   Availability
   Allows you to select **Date/Time** and/or **Distance** availability to be used when ordering driver assignment lists. Employee schedule and distance availability are entered in the employee record, see *Entering a Range of Time for When an Employee is Unavailable* on page 75.

   Field Trip Hours Awarded
   Sorts the entries based on the amount of field trip hours each driver in the list has already taken. The driver with the most hours displays at the bottom.

   Number of Trips Awarded
   Used in totaling trips that will be used when ordering driver assignment lists.

   Number of Refusals
   When checked, the number of trip refusals will be taken into account when ordering driver assignment lists.

   Seniority Date
   By Hire Date or By **Seniority Date** sorts the entries in the list by the dates you entered in the employees record. Hire Date and Seniority Date are entered in the employee record, see *Adding an Employee Record* on page 72.

Assignment Option (Apply Rotation)
A driver will be moved to the bottom of the list once a trip is taken.

Annual Reset Date
Select a date that the system should use to reset the driver assignment list basically giving the driver a clean slate for the upcoming school year. The following fields are reset:

- Field Trip Hours Awarded
- Number of Trips Awarded
- Number of Refusals

All of the rules are then used again to resort the drivers.

7. Click **Update** when you have finished selecting Driver Assignment Rules.

Editing Driver Assignment Rules

To edit driver assignment rules:

Path:) Admin > Driver Assignment Rules

1. Follow the above path to display the Driver Assignment Rules screen.
2. Click on the driver assignment rule template that you want to edit (i.e. Drivers).
3. Edit the driver assignment rules template by checking or unchecking the rules. If you need help with any of these rules see *Adding Driver Assignment Rules* on page 103.
4. Click **Update** when you have finished making changes to the driver assignment rules template.

Deleting Driver Assignment Rules

To delete driver assignment rules:

Path:) Admin > Driver Assignment Rules

1. Follow the above path to display the Driver Assignment Rules screen.
2. Click on the driver assignment rule template that you want to delete (i.e. Drivers).

   Note: *It is recommended that a driver assignment rule is made Inactive and not deleted because when you delete this record, all associated records will be deleted as well.*

3. Click **Update** and then click **Delete**.

Working with Pick Lists

You have the ability to create and maintain multiple Pick Lists for both Drivers and Monitors/Aides and have those Pick Lists available at the same time during scheduling. Drivers and Monitors/Aides can be on any number of Pick Lists and are not relegated to a single list. Multiple Pick Lists allow you to categorize Pick Lists according to their function and then easily locate a specific list of employees at the time a trip needs to be scheduled.

> **Note:** *Each list is independent of each other. Driver Pick Lists can have a different set of driver assignment rules attached to each list.*

The following are examples of specific Pick Lists for specific functions:

- AM Drivers
- PM Drivers
- Weekend Drivers
- Drivers for Garage A, B, C, etc.

When you upgrade from Versatrans Triptracker 9.15 to 9.16, two Pick Lists are automatically created:

- Drivers
- Monitors/Aides

These lists are created using information from the employee record. If there are employees that meet Pick List criteria as described in the following example, they will be automatically assigned to the corresponding Pick List.

> **Note:** *The Pick Lists will be created regardless of whether there are any employees that meet Pick List criteria.*

For example, for drivers this is defined as employees who have, “Active”, “driver”, “qualify for activity vehicle”, and “appear in driver queue” checkboxes checked on the employee record. For monitors/aides this is defined as employees who have “Active” and either the “monitor” or “aide” checkbox checked on the employee record.

The following procedures are involved in creating & using Pick Lists:

- *Assigning Pick List Permissions to a User Group* on page 110.
- *Adding Driver Assignment Rules for Pick Lists* on page 112.
- *Creating a Pick List for Drivers or Monitors/Aides* on page 116.
- *Adding Drivers or Monitors/Aides to a Pick List via the Pick List Screen* on page 119.
- *Adding Drivers or Monitors/Aides to a Pick List via the Employee Record Screen* on page 123.
- *Using Pick Lists to Add Drivers and Monitors/Aides to a Trip Schedule* on page 124.

- *Generating Pick List Reports* on page 134.
- *Importing Employees Into an Existing Pick List* on page 134.

Assigning Pick List Permissions to a User Group

Before you can work with Pick Lists, you must first belong to a user group that has the necessary permissions. Pick List permissions are assigned to user groups as a way to control their access to the Pick List functions in Triptracker.

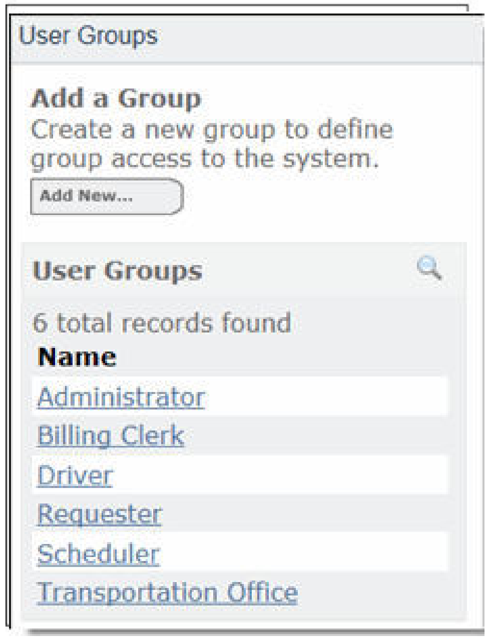
Before assigning Pick List permissions to a user group, you must first create a user group, see *Adding a User Group and Assigning Privileges* on page 265. Once you have created a user group, you can assign employees to the user group, see *Setting up a New User* on page 272.

To assign Pick List permissions to a user group:

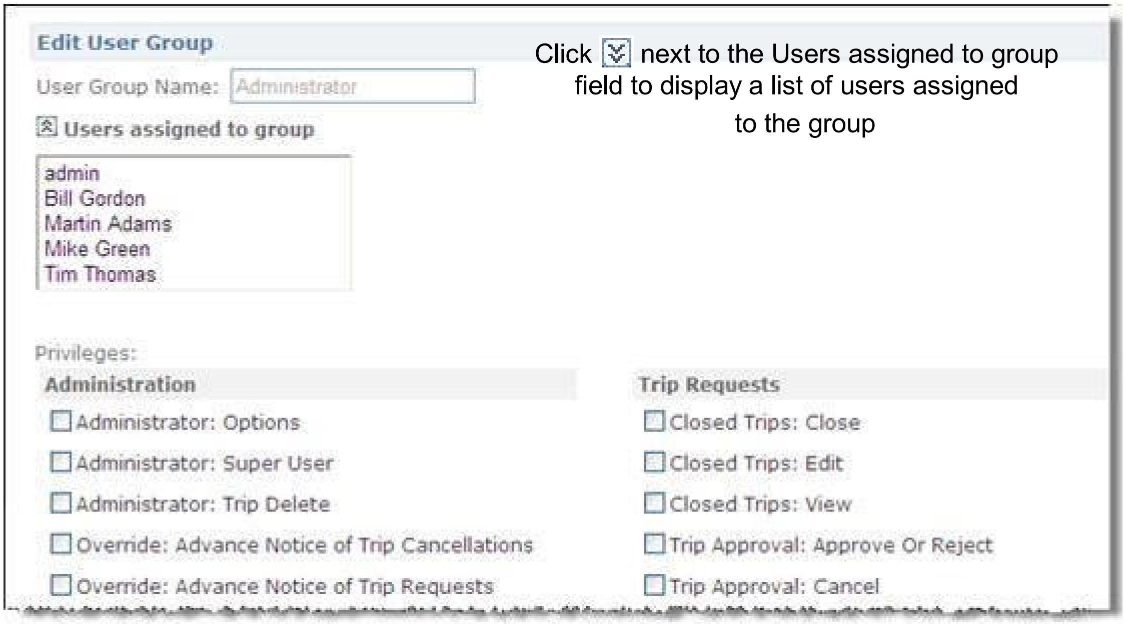
Path:) Admin > User Groups

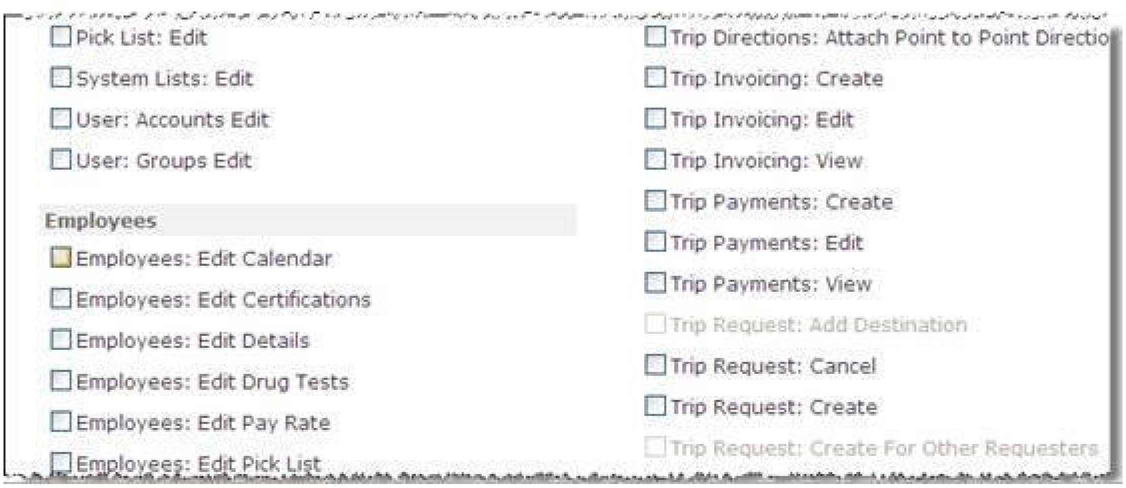
1. Follow the above path to display the User Groups screen.

2. Select the user group that you want to assign Pick List permissions to. The Edit User Group



screen displays.





3. In the permissions list, click the check boxes of the Pick List permissions that you want to assign to this user group and then click to save these permissions.

   Members of a user group who have the Pick Lists: Edit permission or are a Super User, can create drivers or monitors/aides Pick Lists. Members of a user group who have the Employees: Edit Pick List permission or are a Super User can work with Pick Lists from the Employee Record window.

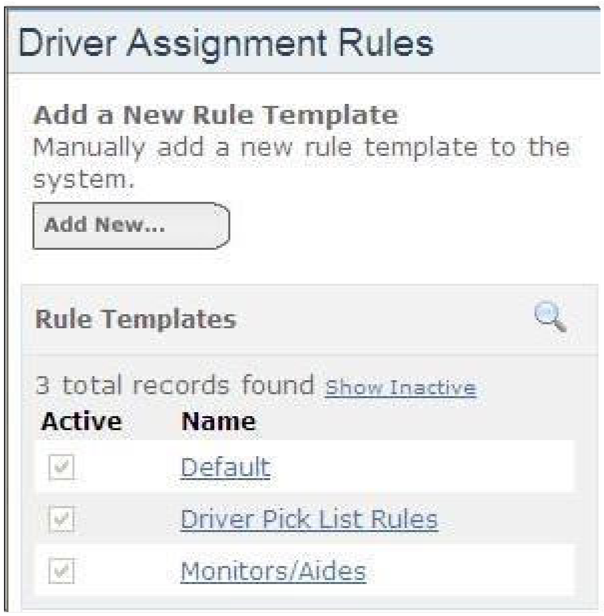
Adding Driver Assignment Rules for Pick Lists

When you create a Pick List with a List Type of “Drivers”, you will have the option of selecting a driver assignment rule that will be applied to the Pick List, see *Creating a Pick List for Drivers or Monitors/Aides* on page 116. Even though you may already have driver assignment rules, you may want to create rules that are for a specific Pick List.

To add driver assignment rules for Pick Lists:

Path: **Admin > Driver Assignment Rules**

1. Follow the above path to display the Driver Assignment Rules screen.



2. Click **Add New** to display the Add a Rule Template Screen.

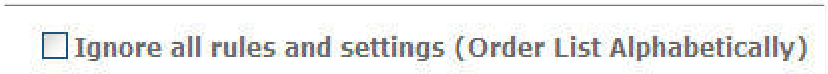
3. Enter a name for the driver assignment rules template.

4. Select **Active** for the status. Rules which have been checked as **Active** will appear for selection in Pick Lists. Rules which have been checked as **inactive** will not appear for selection in Pick Lists.

5. Click the check boxes to select the rules to use for ordering driver assignment lists.

6. Click  to move a rule up or down on the list.

   The higher the rule is on the list, the higher the priority that rule will receive.



Allows you to order list alphabetically and have no rules applied.

Seniority Rank
Seniority Rank is entered in the employee record, see *Adding an Employee Record* on page 72.

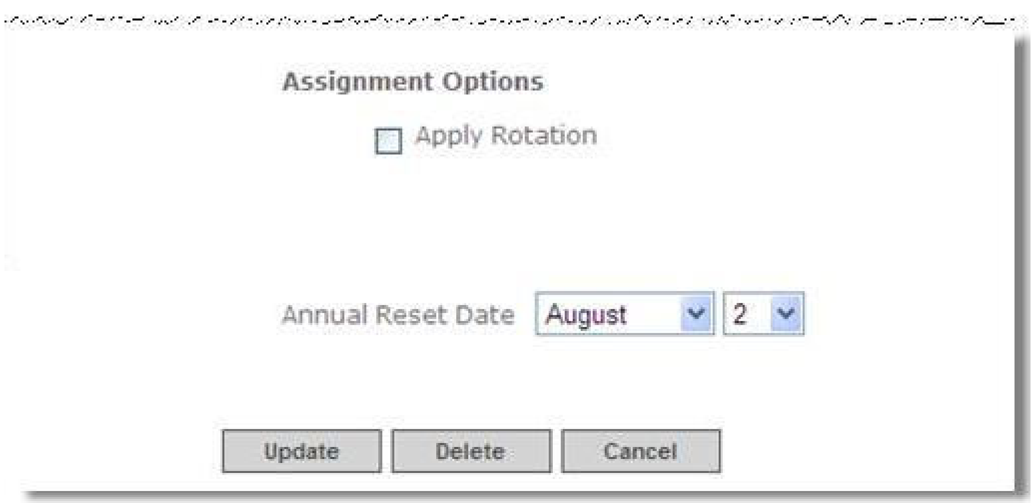
Availability
Allows you to select **Date/Time** and/or **Distance** availability to be used when ordering driver assignment lists. Employee schedule and distance availability are entered in the employee record, see *Entering a Range of Time for When an Employee is Unavailable* on page 75.

Field Trip Hours Awarded
Sorts the entries based on the amount of field trip hours each driver in the list has already taken. The driver with the most hours displays at the bottom.

Number of Trips Awarded
Used in totaling trips that will be used when ordering driver assignment lists.

Number of Refusals
When checked, the number of trip refusals will be taken into account when ordering driver assignment lists.

Seniority Date
By Hire Date or By **Seniority Date** sorts the entries in the list by the dates you entered in the employees record. Hire Date and Seniority Date are entered in the employee record, see *Adding an Employee Record* on page 72.



Assignment Option (Apply Rotation)
A driver will be moved to the bottom of the list once a trip is taken.

Annual Reset Date
Select a date that the system should use to reset the driver assignment list basically giving the driver a clean slate for the upcoming school year. The following fields are reset:

- Field Trip Hours Awarded
- Number of Trips Awarded
- Number of Refusals

All of the rules are then used again to resort the drivers.

7. If you are creating a new Driver Assignment Rules template, click **Add**. If you are editing a template click **Update**.

Creating a Pick List for Drivers or Monitors/Aides

By default, you are provided with two Pick Lists: Drivers and Monitors/Aides.

You can create additional Pick Lists if you are a SuperUser or if you are a member of a group that has the permission Pick Lists: Edit.

To create a new Pick List for drivers or monitors/aides:

Path:) Admin > Pick Lists

1. Follow the above path to display the “Pick Lists” screen.

2. Click **Add New** to display the “Add an Employee Pick List” screen.

3. Select the **Pick List Setup** tab. This is the default selection.
4. Enter a name for the new Pick List.
5. Make sure that the status is **Active** (the status is Active by default). Pick Lists which have been checked as **Active** will appear for selection in drop-down lists on the Trip Scheduling screen. Pick Lists which have been checked as **Inactive** will not appear for selection in drop-down lists on the Trip Scheduling screen.

   Note: *You may wish to set a Pick List as Inactive while you are assigning members. Once your list is complete, you can make it active and available for use in the Trip Scheduling screen.*

6. Select the type of Pick List that you want to create:

   Drivers
   Select drivers when you want to create a Pick List of employees that can be selected as drivers of a vehicle.

   Monitor/Aides
   Select monitors/aides when you want to create a Pick List of employees that can be selected as monitors or aides to ride on a vehicle.

7. Select the employee assignment:

Automatic
Pick Lists are created using information from the employee record. If there are employees that meet Pick List criteria, they will be automatically assigned to the corresponding Pick List.

For example, for drivers this is defined as employees who have, “Active”, “driver”, “qualify for activity vehicle”, and “appear in driver queue” checkboxes checked on the employee record. For monitors/aides this is defined as employees who have “Active” and either the “monitor” or “aide” checkbox checked on the employee record.

Note: *Employees cannot be manually added to or deleted from automatically maintained Pick Lists.*

Manual
Select manual when you want to add employees and maintain the Pick List yourself.

8. Use the Driver Assignment Rules drop-down button to display a list of Driver Assignment Rules (if applicable). Select the Driver Assignment Rules that you want applied to the Pick List. See, *Adding Driver Assignment Rules*.
9. Click **Add.** The Employee Associations tab is enabled. If you have created a manual list, you can now assign drivers or monitors/aides. See, *Adding Drivers or Monitors/Aides to a Pick List via the Pick List Screen* on page 119.

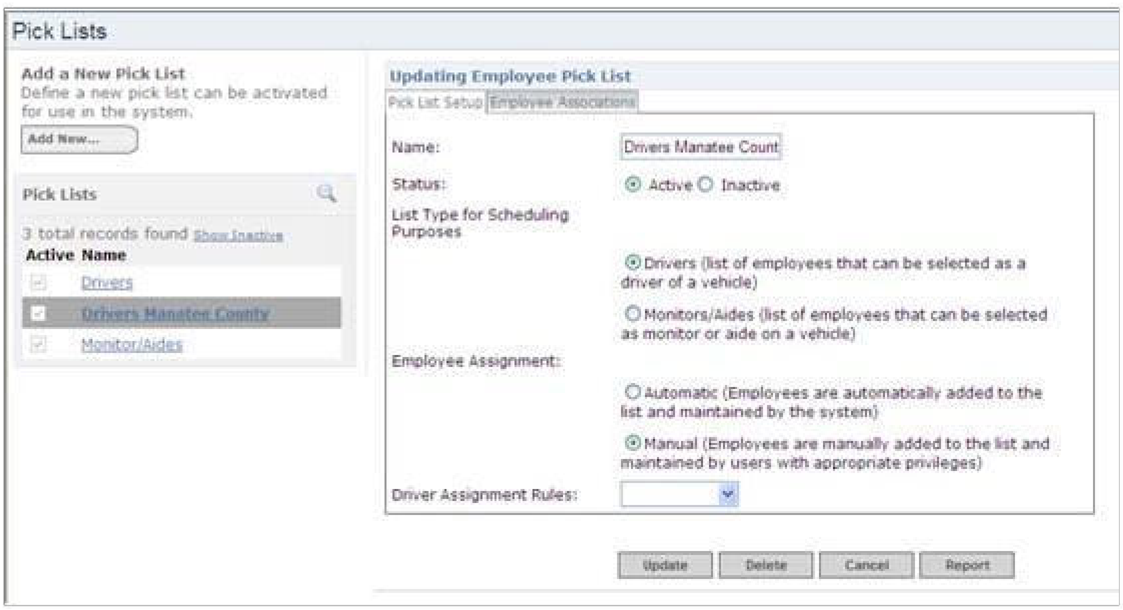
Adding Drivers or Monitors/Aides to a Pick List via the Pick List Screen

Using the “Pick List Assignment” screen or the “Employee Record” screen, users with appropriate permissions can select the Pick List that they want to use and assign drivers or Monitors/Aides to that Pick List**.** For information on using the “Employee Record” screen, see *Adding Drivers or Monitors/Aides to a Pick List via the Employee Record Screen* on page 123.

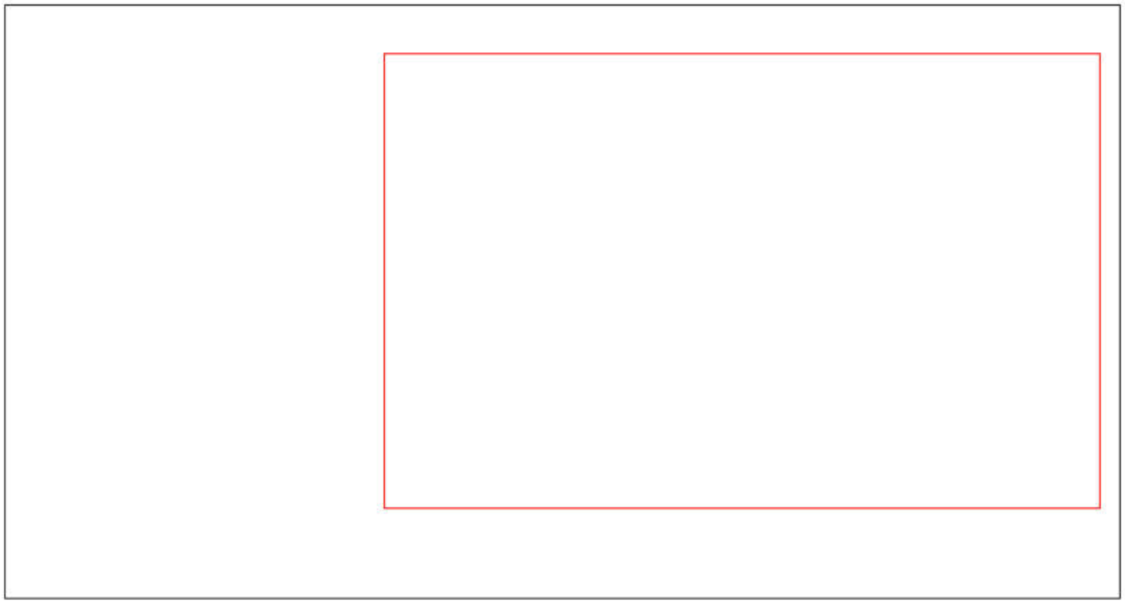
To assign drivers or monitors/aides to a Pick List via the Pick List screen:

Path:) **Admin > Pick Lists**

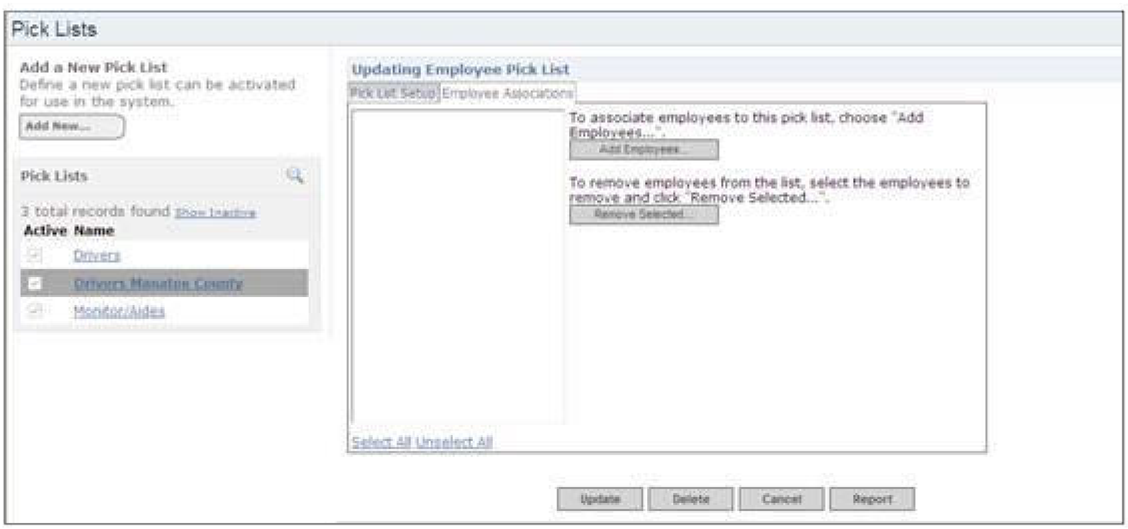
1. Follow the above path to display the Pick Lists screen.



2. Click on the Pick List that you want to use (i.e. Driver Manatee County) to display the “Updating Employee Pick List” panel.



3. Select the **Employee Associations** tab to display the “Employee Associations” screen. If you haven’t previously added employees, the screen will be blank.

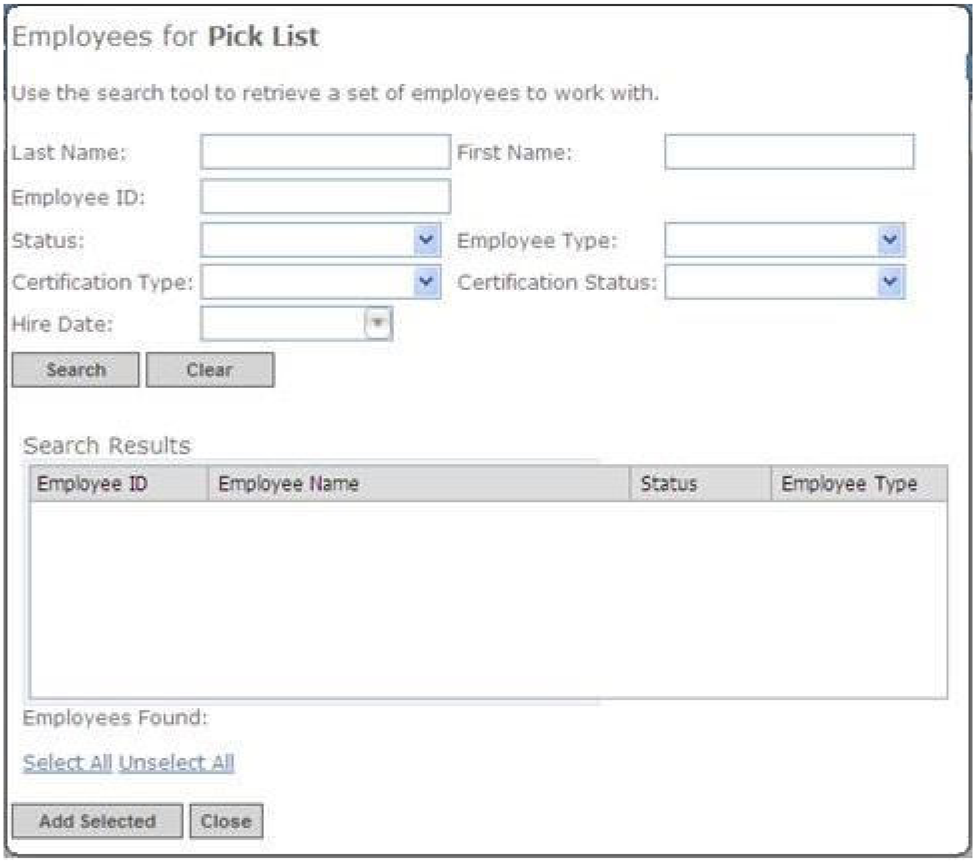


The “Associated Employees” screen displays the employees that are currently assigned to the Pick List you selected.

If you select a Pick List that is automatically maintained, the system automatically displays a list of employees based on the criteria selected in Pick List Setup, see *Creating a Pick List for Drivers or Monitors/Aides* on page 116.

Note: *You cannot add or remove employees from an automatically maintained Pick list.*

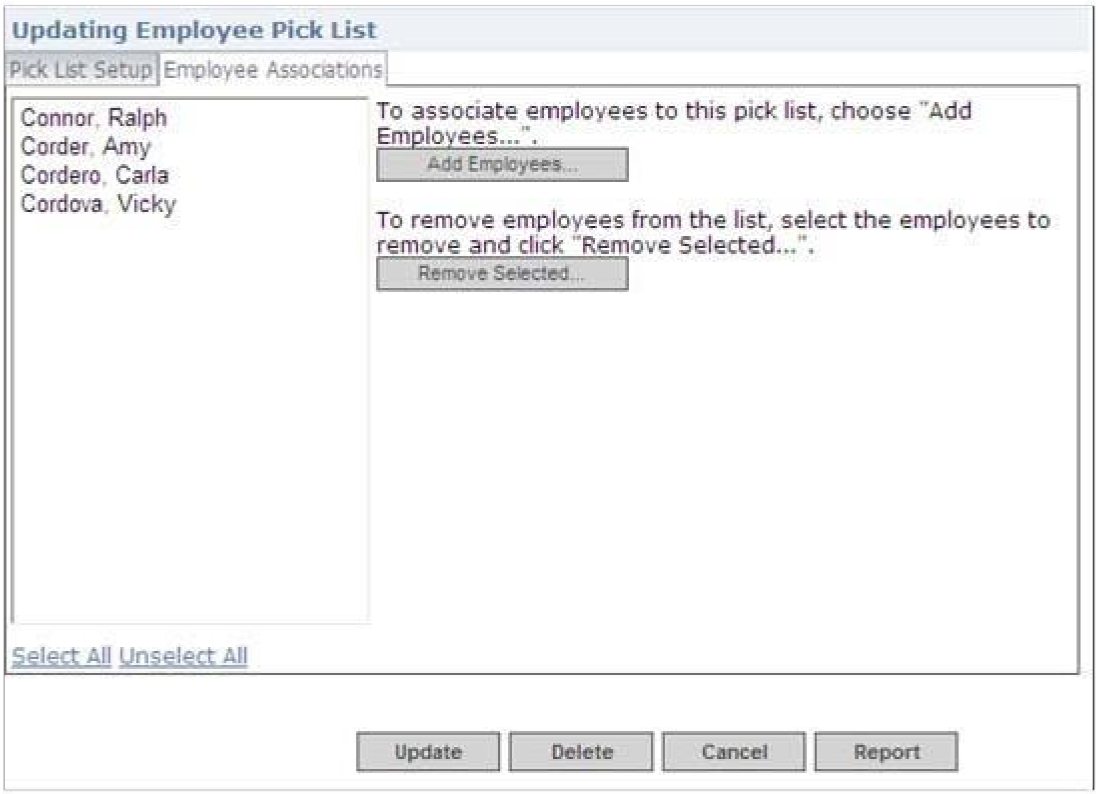
4. Click **Add Employees** to display the “Employees for Pick List” popup screen.



5. Enter or select the desired criteria (i.e. Employee Type = Driver).Click **Search** to create a list of employees that meet your search criteria.

6. Select an employee by clicking on the employee. Select multiple employees by holding down the **Ctrl** button and clicking on employees. You can also use the **Select All** and **Unselect All** buttons.

7. When you are finished selecting employees, click **Add Selected.** The “Employees for Pick List” screen closes and your selections are displayed on the “Employee Associations” screen.



8. You can remove an employee by clicking on the employee and then clicking **Remove Selected**.

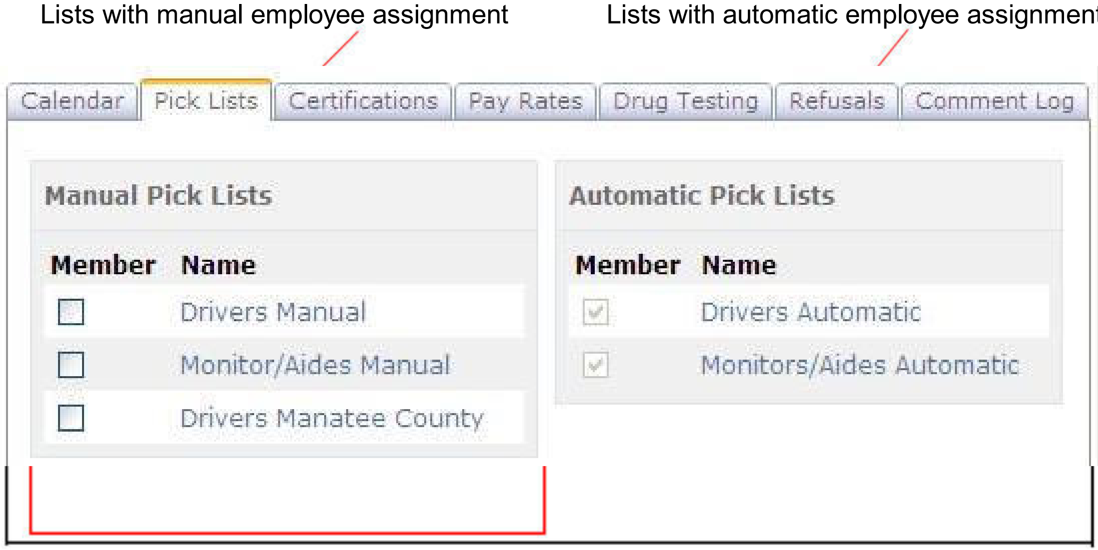
Adding Drivers or Monitors/Aides to a Pick List via the Employee Record Screen

Users who are a member of a group that has the permission Employees: Edit Pick List or Super Users can add employees to a Pick List via the Employee Record screen.

To add drivers or monitors/aides to a Pick List via the Employee Record screen:

1. Perform a search to locate the employees whose records you want to work with.
2. Click on the employee that you want to add to a Pick List to display the Employee Record screen.
3. Click the **Pick List** tab.

Lists with manual employee assignment Lists with automatic employee assignment



There are two types of Pick Lists: lists where employees have been manually assigned and lists where employees have been automatically assigned.

All the manual Pick Lists are listed in the “Manual Pick Lists” panel. The “Automatic Pick Lists” panel will display Pick Lists based on criteria checked on the employee’s record as described below.

Drivers
If “Active”, “Driver”, “Qualify for activity vehicle”, and “Appear in driver queue” checkboxes are checked, the Auto Pick Lists with List Type “Drivers” are displayed.

Monitors/Aides
If “Active” and either the “Monitor” or “Aide” checkbox is checked, the Auto Pick Lists with List Type “Monitors/Aides” are displayed.

4. In the “Manual Pick Lists” panel, check the boxes next to the Pick Lists that you want the employee added to and click Update.

5. If the employee meets the Pick List criteria for automatic Pick Lists, you can either change the “Driver”, “Monitor” or “Aides” criteria to place the employee on a different automatic Pick List or you can uncheck the criteria to remove the employee from automatic Pick Lists.

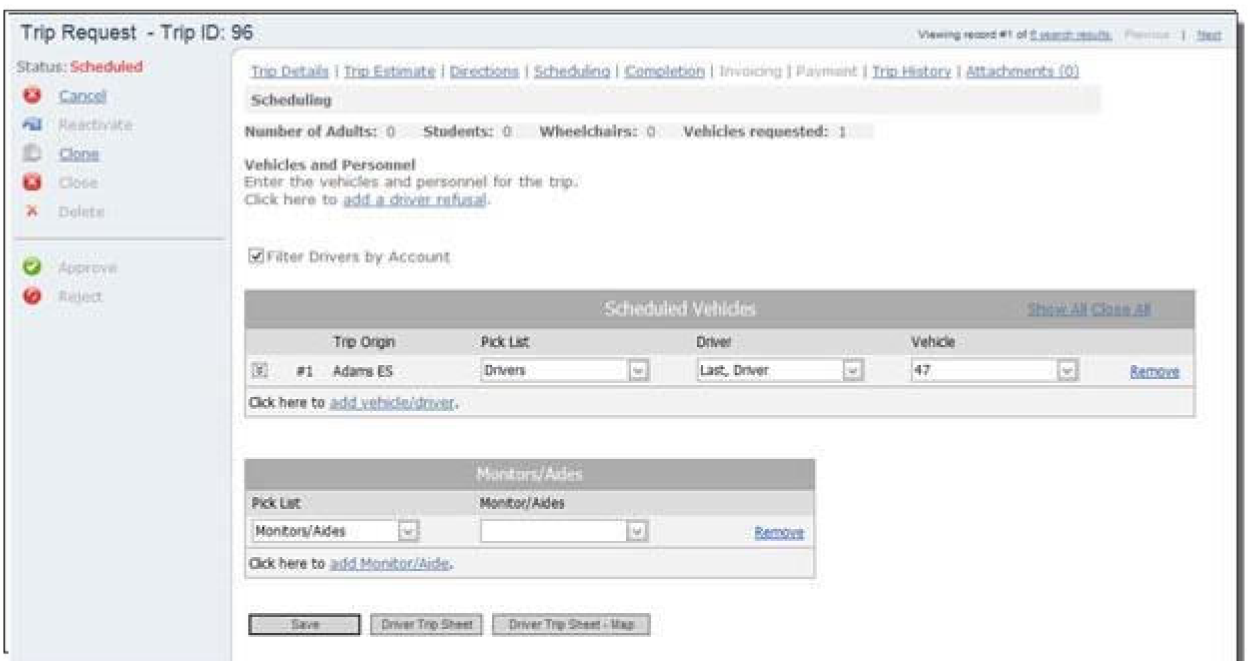
   Note: *You cannot select or unselect Pick Lists in The “Automatic Pick List” panel. This panel only serves as a list of automatic Pick Lists associated with the employee.*

Using Pick Lists to Add Drivers and Monitors/Aides to a Trip Schedule

Once the Trip Request is approved by the final approver in the approval path, the Scheduling tab becomes active and you can schedule a trip. You can schedule as many vehicles, drivers, monitors, and aides as necessary. If a driver turns down a trip, you can record a trip refusal for that driver. If a destination is drop and return, you can have the driver return to the origin after dropping students off at the destination, as well as having the option of assigning different drivers for each ‘leg’ of the trip.

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select the Scheduling tab to display the Trip Request - Scheduling screen.



To add a vehicle and driver to the trip:

Optional. When checked, it will list only drivers associated with the Pick List and associated with the account. Unchecking will list all drivers associated with the selected Pick List.

Note: *If there are drivers associated with the account, the filter will be checked on by default. You will need to uncheck this option to view all the drivers in the Pick List.*

3. Click the # 1 tab.

4. Click the **Pick List** drop-down button and click on a Pick List to select it.

Note: *The Pick Lists will be in alphabetical order until a Pick List is selected and the record is updated. The Pick List used at the time of updating becomes the default Pick List.*

5. Click the **Driver** drop-down button and click on a drives's name to select it. A list of drivers assigned to the Pick List displays.

Note: The selection of drivers for a trip can be restricted so that the next driver in the rotation is automatically selected. See, *Generating Pick List Reports on page 134*.

The following determines the Pick List driver order:

- If the Pick List is associated with a set of Driver Assignment Rules, the rules will be applied to the list of drivers.
- If the Pick List is not associated with a set of Driver Assignment Rules, the drivers will be displayed in alphabetical order by Employee Last Name, First Name.

6. Click the **Vehicle** drop-down button and click on a vehicle's ID to select it.
7. To add another driver and vehicle, click **Add**. A # 2 tab displays where you can select the same Pick List or a different Pick List, and then select a Diver and Vehicle.

To add an aide and/or monitor to the trip:

1. Click the Aides and Monitors tab.

2. Click the **Pick List** drop-down button and click on a Pick List to select it.
3. Click the **Monitor/Aide** drop-down button and click on a monitor or aides name to select it.
4. To add another aide/monitor, click **Add**. The name you selected is added to the Aide/Monitor list.
5. You can continue to add as many aides/monitors as necessary by clicking **Add**. You can then select the same Pick List or a different Pick List, and then select a monitor or aide.

For a “Drop and Return” Trip:

1. If a destination is a “Drop and Return” (trip where the driver drops students at the destination and returns to the origin), check the box next to the destination that is drop and return.

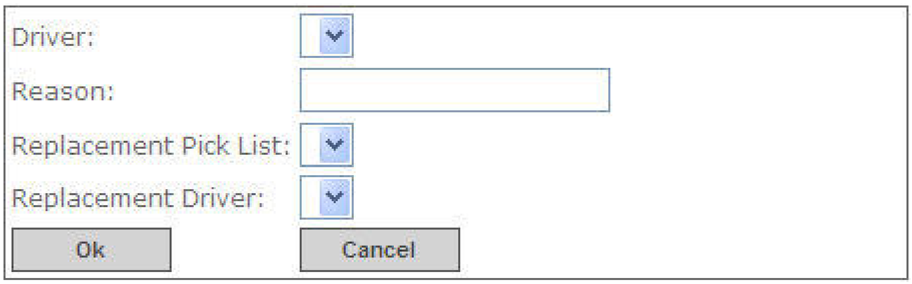
You have the option of assigning different drivers and vehicles for each ‘leg’ of the trip.

2. Click the **Pickup Pick List** drop-down button and click on a Pick List to select it.
3. Click the **Pickup Driver** drop-down button and click on a driver’s name to select it.
4. Click the **Pickup Vehicle** drop-down button and click on a vehicle’s ID to select it.

5. Click **Save** to save your scheduling entries. If a driver or bus is unavailable or for whatever reason you need to make a change, you can return to the applicable section, make the changes and re-save the schedule. The system sends an email confirmation message according to your message option settings.

To add a driver refusal:

1. Click add a driver refusal.



2. Click the **Driver** drop-down button and click on a driver's name to select it.
3. Enter the reason for the refusal in the Reason field.
4. Click the **Replacement Pick List** drop-down button and click on a Pick List name to select it.
5. Click the **Replacement Driver** drop-down button and click on a Driver's name to select it.
6. Click **Ok** to save the refusal.

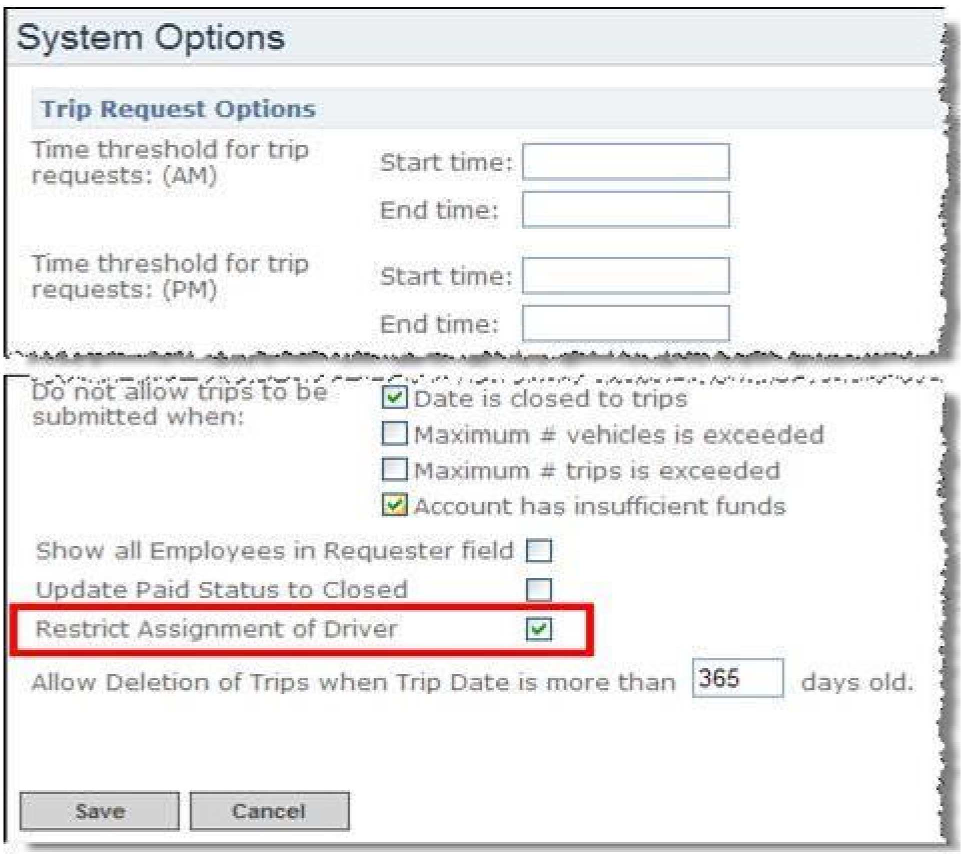
Restricting the Selection of Drivers for a Trip

The selection of drivers for a trip can be restricted so that the next driver in the rotation is automatically selected.

Note: *The assignment/selection of monitors and aides is not affected by this option.*

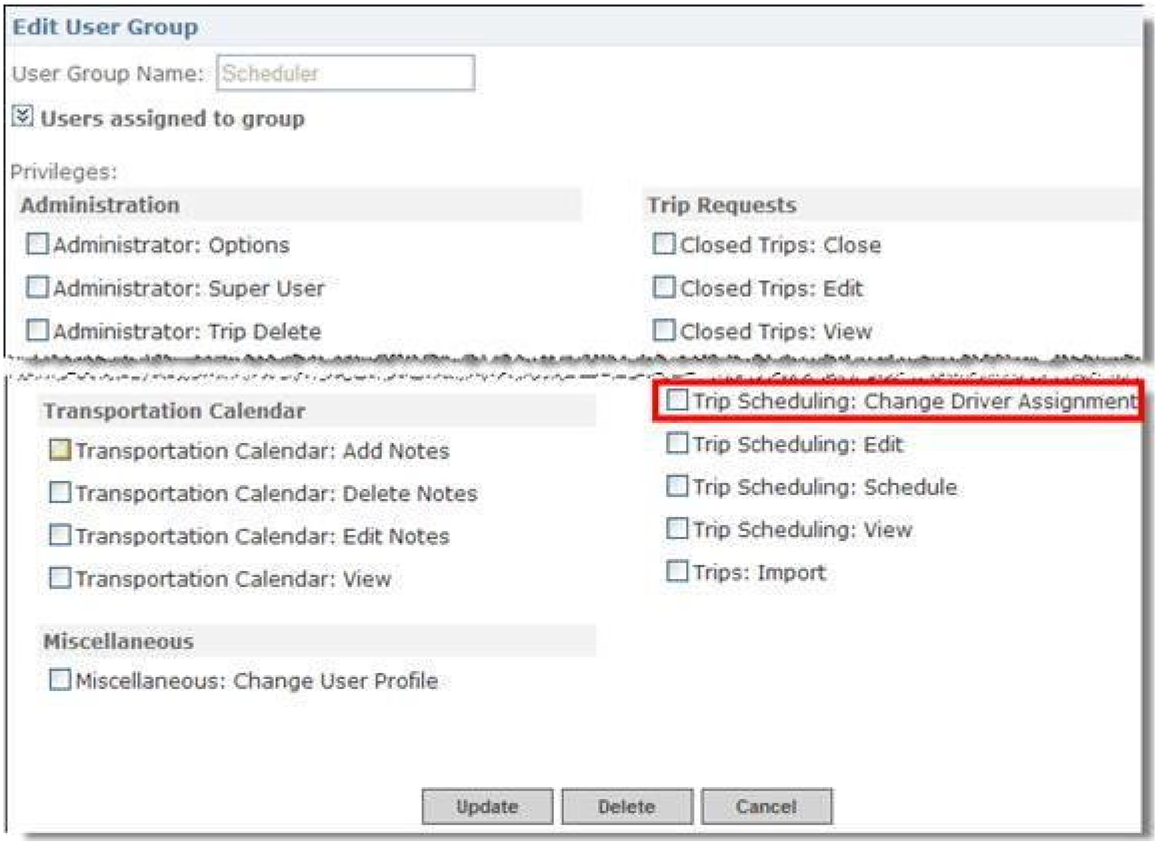
Path:) Admin > System Options

1. Follow the above path to display the System Options screen.
2. Check the option, “Restrict Assignment of Driver”.



3. Click **Save**.

If the “Restrict Assignment of Driver” option is checked and you don’t have the permission “Trip Scheduling:Change Driver Assignment” permission checked, then you won’t be able to manually select a driver and the next driver in the rotation will be automatically selected.

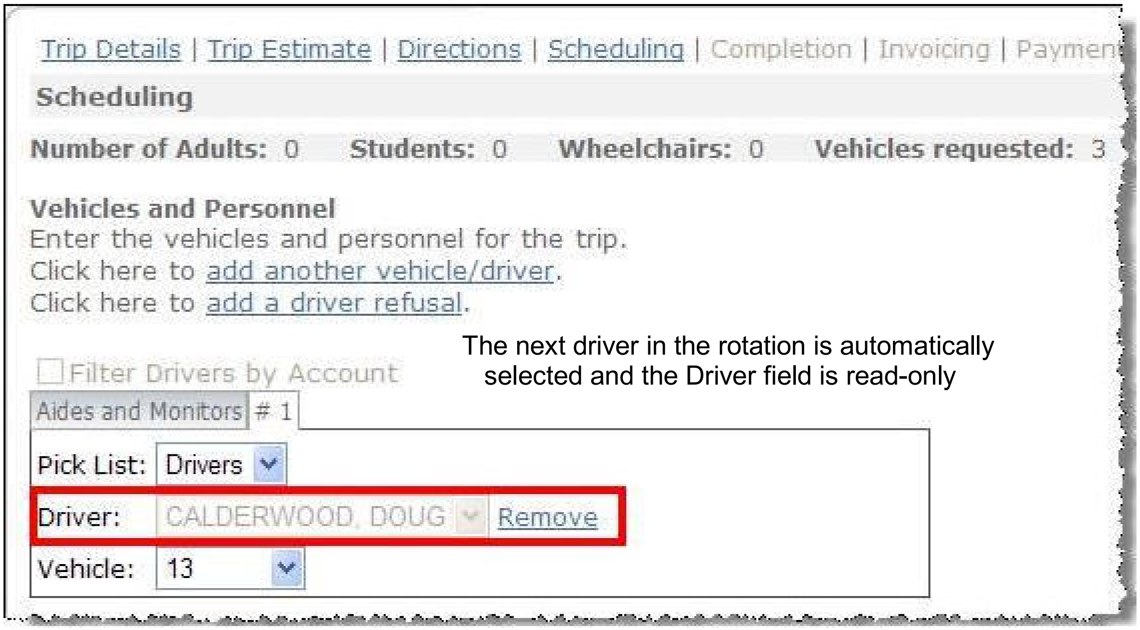


The following scenario applies to users who “Do Not” have the “Trip Scheduling:Change Driver Assignment” permission and are “Not” a Super User.

4. Locate a trip request (see *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
5. Select the Scheduling tab to display the Trip Request - Scheduling screen.
6. The # 1 tab is displayed.
7. Click the Pick List drop-down button and click on a Pick List to select it.

Note: *The Pick Lists will be in alphabetical order until a Pick List is selected and the record is updated. The Pick List used at the time of updating becomes the default Pick List.*

8. The Driver field is read-only. The next driver in the rotation is automatically selected and displayed.



The following rules apply:

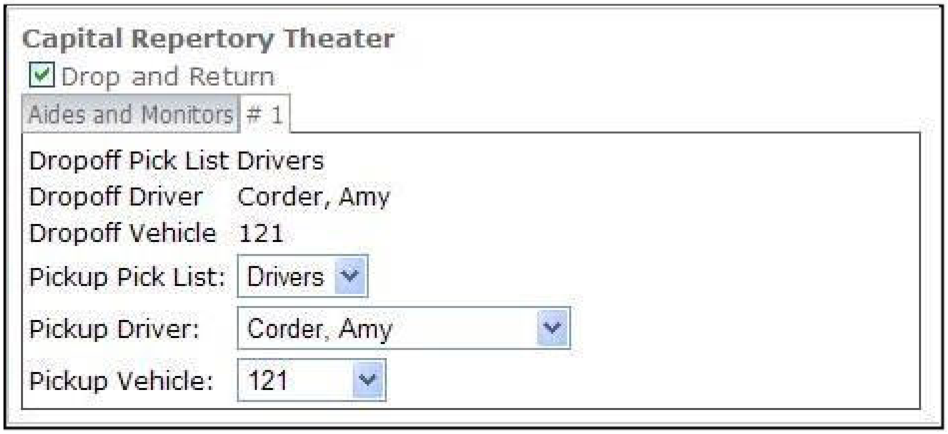
- Once a Pick List is selected, the Driver will be automatically selected. The selected driver will be the first in the list.
- If a second Driver/Vehicle is added, and the same Pick List is used, the Driver will default to the second driver in the list and so on with subsequent drivers. If there are no drivers available in the list to be assigned, the vehicle/driver will not be saved.
- If there is a default vehicle with the driver, the user will be able to change it.
- f the trip is designated as a Drop and Return, the same driver will be assumed for all legs of the trip and will only be able to be changed by a user with the appropriate permissions.
- If the “Filter by Account” is turned on or off due to currently functionality, you will not be able to change it if you do not have the permission to change the assignment.

9. Click the Vehicle drop-down button and click on a Vehicle’s ID to select it.

10. To add another driver and vehicle, click the hyperlink **add another vehicle drive**r. The # 2 tab displays where you can select the same Pick List or a different Pick List.

For a Drop and Return Trip

1. If a destination is a “Drop and Return” (trip where the driver drops students at the destination and returns to the origin), check the box next to the destination that is drop and return.



Pickup Pick List field
“Read-Only”. It defaults from the main Pick List.

Pickup Driver field
“Read-Only”. The same driver will be automatically assigned for each ‘leg’ of the trip.

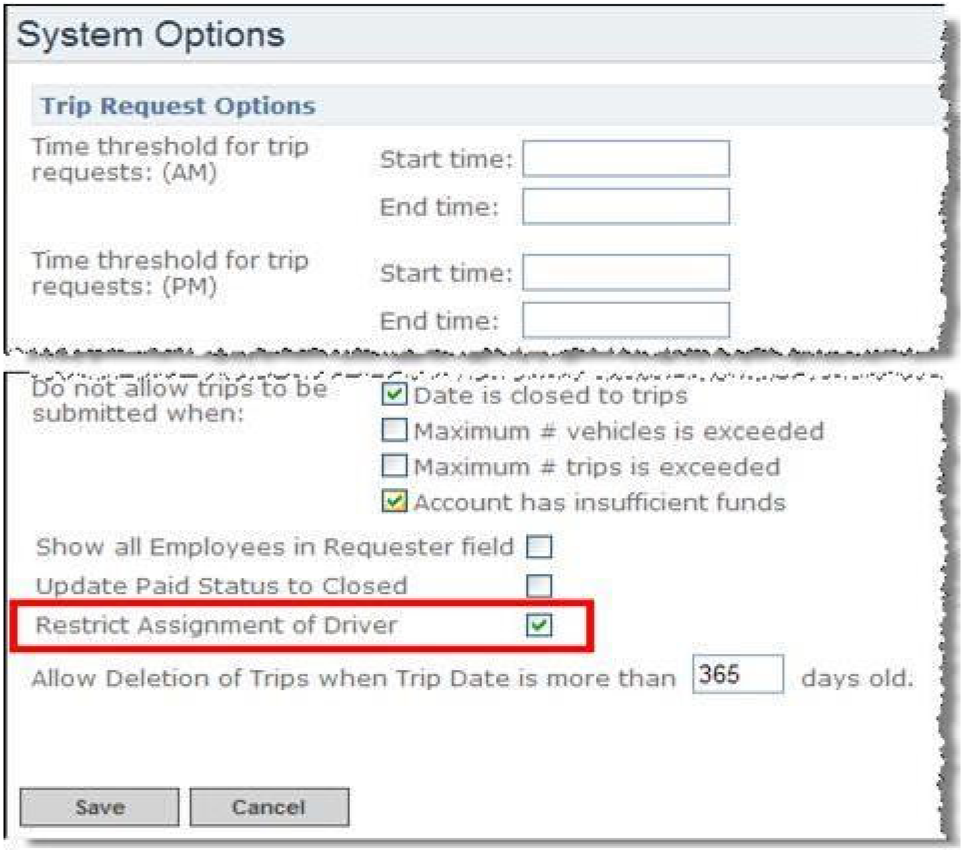
2. Click the Pickup Vehicle drop-down button and click on a vehicle’s ID to select it.
3. Click **Save** to save your scheduling entries. If a driver or bus is unavailable or for whatever reason you need to make a change, you can return to the applicable section, make the changes and re-save the schedule. The system sends an email confirmation message according to your message option settings.

The Handling of Elligibilty for Driver Refusal

Path:) **Admin > System Options**

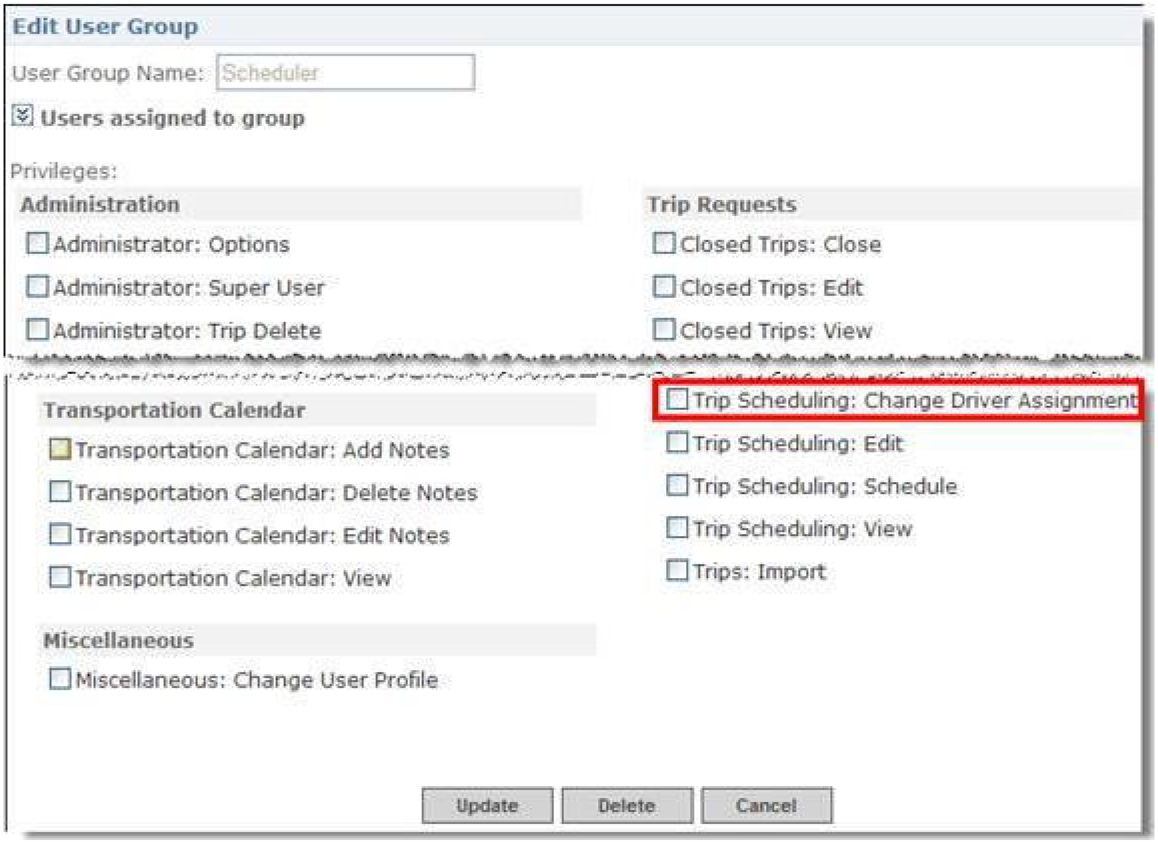
1. Follow the above path to display the System Options screen.

2. Check the option, “Restrict Assignment of Driver”.



3. Click **Save**.

If the "Restrict Assignment of Driver" option is checked and you don't have the permission "Trip Scheduling:Change Driver Assignment" permission checked, then you won't be able to manually select a driver and the next driver in the rotation will be automatically selected.



The following scenario applies to users who "Do Not" have the "Trip Scheduling:Change Driver Assignment" permission and are "Not" a Super User.

Generating Pick List Reports

The Pick List Reports provide a way of managing your Pick Lists. Using the Triptracker report tools, you can generate, preview, print, or export a report in a number of formats including Excel or an Acrobat (PDF) file.

The following types of Pick List reports are available:

- *Pick List Rotation*: This report lists the appropriate current "order" of each Pick List based on its Driver Assignment Rules.
- *Pick List Members*: This report lists all employees (Active and Inactive) in alphabetical order who are members of the Pick List.
- *Associated Pick List*: This report lists the Pick Lists that the employee is a member of.

To learn how to generate these reports, see *Generating Reports in Triptracker* on page 255.

Importing Employees Into an Existing Pick List

The Triptracker import utility allows you to import employees that are currently entered into Triptracker into an existing Pick List. The files can be .txt, .csv, or .tab in either fixed or delimited format. When the import is complete, this information will be available for use in the system.

Note: *In order to associate employees with Pick Lists both employees and Pick Lists must already exist in Triptracker. No new Pick Lists or employees will be created via this import.*

Importing Employees Into an Existing Pick List Using a Fixed Format

To import employees into an existing Pick List using a fixed format:

Path:) **Admin > Import Utility**

1. If you don't have a Pick List, you will need to create one. See, *Creating a Pick List for Drivers or Monitors/Aides* on page 116.
2. Follow the above path to display the Import Utility screen.
3. Click and select Pick List to display the import options for Pick Lists as shown below.

4. Selected **Fixed** for the type of import.
5. Click **Browse** and locate the file that you want to import. You can import Employee Name and Employee ID.

   Note: *A Pick List must exist before you can import employees into a Pick List. The Pick List Name and Employee ID must be an exact match to the Pick List Name and Employee ID that is currently entered in Triptracker.*

   The following table shows the format for a fixed file.

Screen Name
*Pick List Name
*Employee ID

* *indicates a required field for the import*

A sample .txt file might look like this:

Drivers 00271
Drivers 00345

Drivers 00351
Drivers 00352
Drivers 00285
Drivers 00216

6. Enter the row that you want to start at in the **Start at row** field.

   If there isn't a header line, set the number to 1. Otherwise, enter the number that corresponds to the first row of valid data.

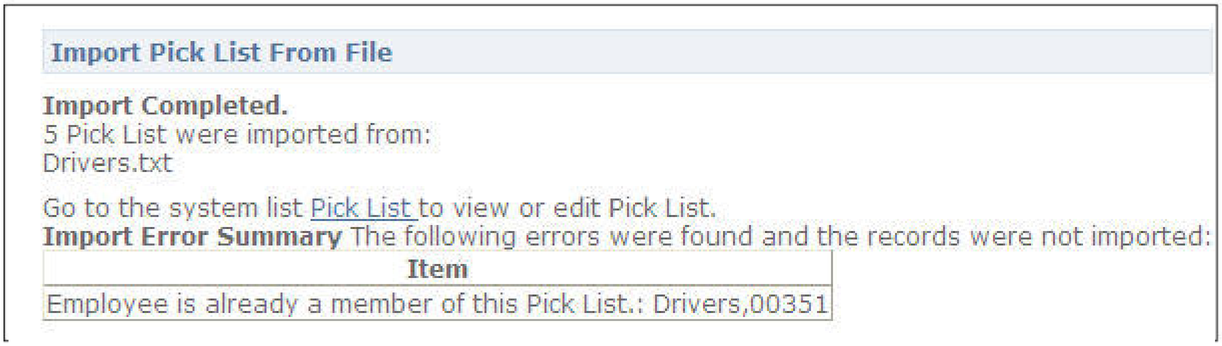
   Pick List Name/Employee ID - Start - End
   In the **Start** and **End** boxes, enter how long the fields should be. For example, if the Pick List Name starts in the first column of the file and it is ten characters in length, enter 1 in the **Start** box and 10 in the **End** box.

7. Click Import to start the importing process. You will be able to preview a sample of your file for accuracy.

8. Click Continue to begin the import process. This will show you the first 10 rows of data in

   your import file.

9. If there are errors, you can correct the errors in the file that you are importing. When the errors have been corrected, select the file and perform the import again. When your import is successful, you will receive a message indicating how many Pick Lists were imported.



10. Click the **Pick List** link to display the Pick Lists screen where you can edit the Pick Lists.

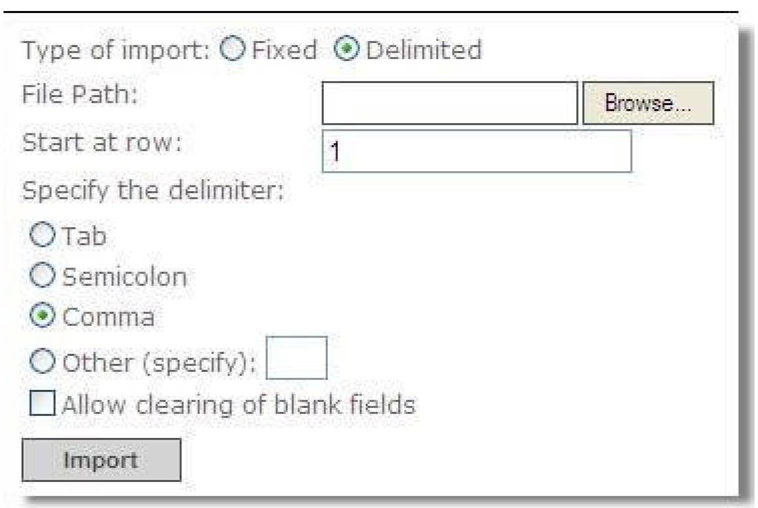
Importing Employees Into an Existing Pick List Using a Delimited Format

To import employees into an existing Pick List using a delimited format:

Path:) **Admin > Import Utility**

1. If you don't have a Pick List, you will need to create one. See, *Creating a Pick List for Drivers or Monitors/Aides* on page 116.
2. Follow the above path to display the Import Utility screen.
3. Click  and select Pick List to display the import options for Pick Lists as shown below.

4. Selected **Delimited** for the type of import.



5. Click 

and locate the delimited file that you want to import.

In order for Triptracker to know what values to populate into which fields in the database, you MUST include a header in your delimited file that defines the fields that you are importing. The system expects the field names to be defined as follows. The field names are not case-sensitive.

** indicates a required field for the import*

Screen Name	Delinited Field Name
*Pick List Name	PickList
*Employee ID	EmployeeNo

A sample delimited file might look like this:

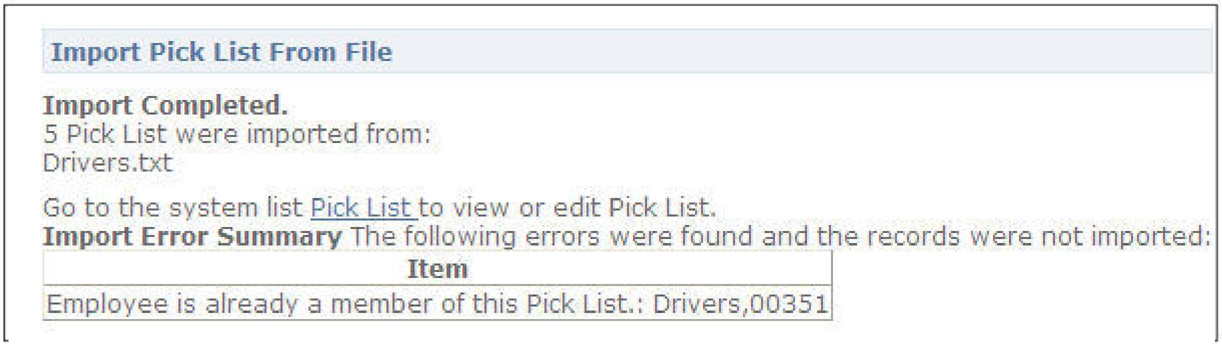
PickList,EmployeeNo
Drivers1,4
Drivers,2
Drivers,3
Drivers1,400000
Drivers1,20

Note: *A Pick List and Employee number must exist before you can import Pick Lists. The Employee Name and Employee ID must be an exact match to the Employee Name and Employee ID that is currently entered in Triptracker.*

6. Specify the row number that the data in the file begins at (do not count the row that defines the fixed definitions). This defaults to one. Typically this value does not change.
7. Select the type of delimiter that was used for creating the file that is being imported, (Tab, Semicolon, Comma, or Other).
8. Click **Import** to start the importing process. You will be able to preview a sample of your file for accuracy.

9. Click to begin the import process. This will show you the first 10 rows of data in your import file.

10. If there are errors, you can correct the errors in the file that you are importing. When the errors have been corrected, select the file and perform the import again. When your import is successful, you will receive a message indicating how many vehicles were imported.



11. Click the **Pick List** link to display the Pick Lists screen where you can edit the Pick Lists.

Setting Up Trip Locations

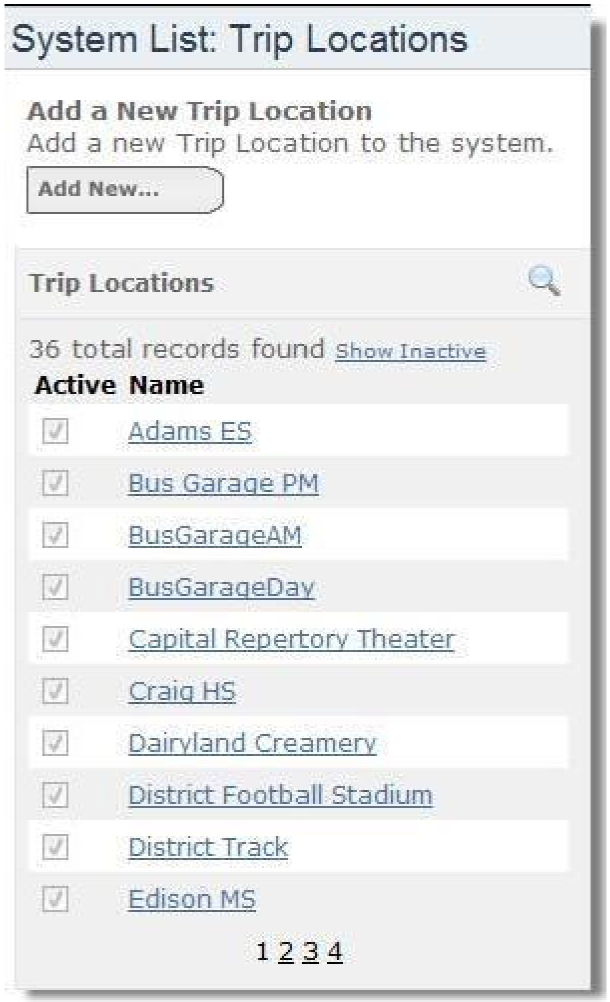
Trip Locations are the destinations and origins of a field trip whether students are going from school to the museum, or from the away game field back to school. Trip locations can either be imported into Triptracker or entered manually. See, *Importing Buildings, Vehicles, Employees, etc.* on page 294.

Adding a Trip Location

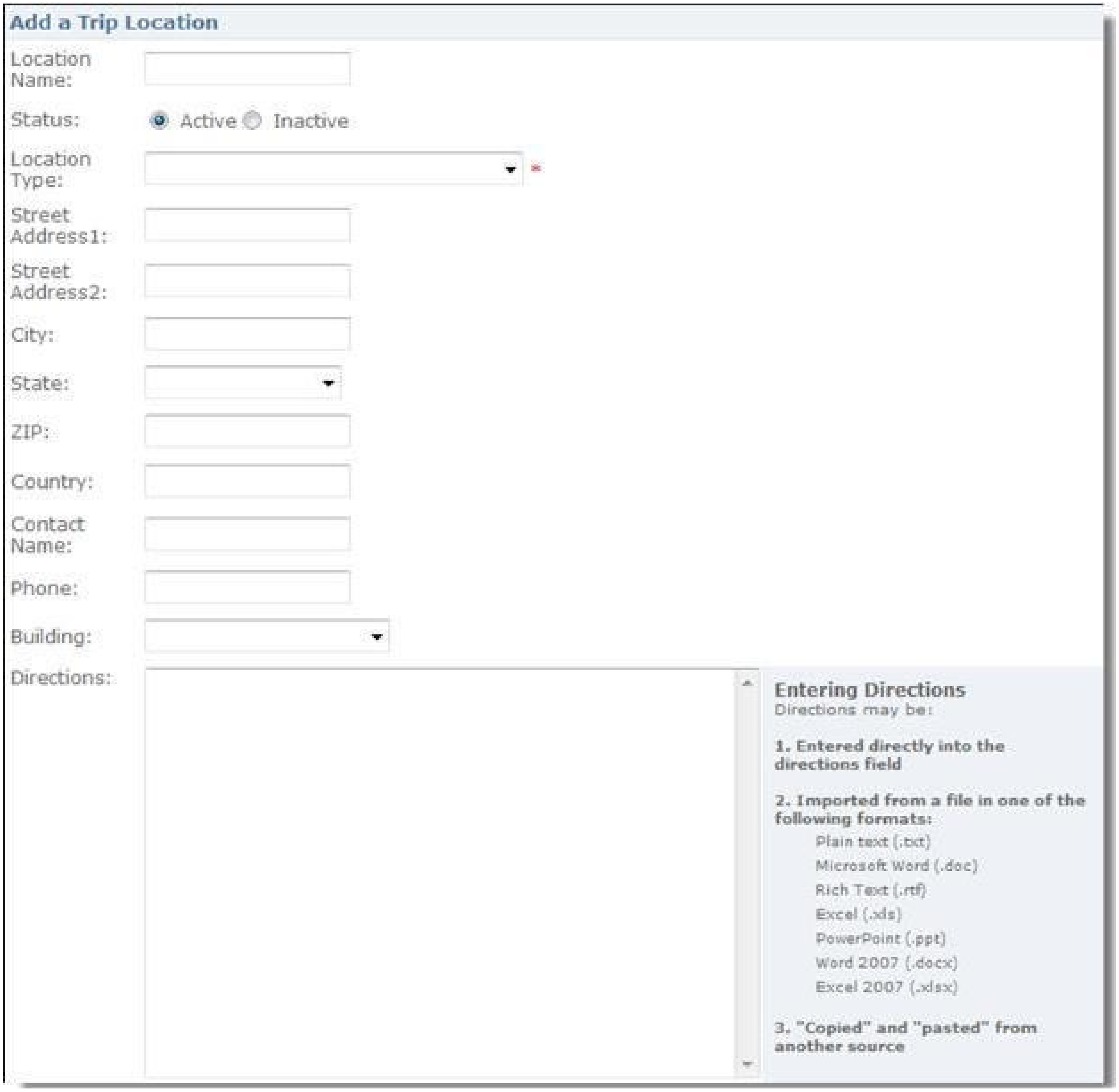
To add a trip location:

Path:) **Admin > System Lists > Trip Locations**

1. Follow the above path to display the System List: Trip Locations screen.

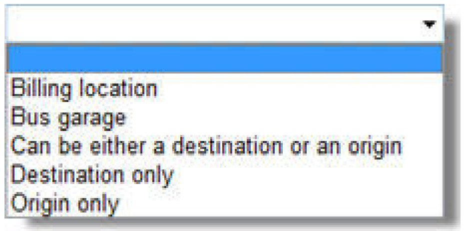


2. Click **Add New** to display a blank record.



3. Enter the name of the trip location in the Location Name field.
4. Make sure that the Active check box is checked.

5. Click the Location Type drop-down button to display a list of location types.



6. Select the location type that is appropriate for the record you are entering. Trip origins are always the starting places for field trips; trip destinations are the places you are going to.

   An example of a trip destination that may also be an origin is a high school. Elementary school students may go to the high school for a program but high school students may go on field trips too.

   Street Address/City//State/Zip
   It is important that valid information is entered since the information entered here will be used for generating textual point-to-point directions and a map.

   Directions
   The directions entered here will be used when you are creating directions for a trip request.

7. Click the Building drop-down button and select a building from the list. When a trip is being requested, the requester is associated with an account. The building associated with the requester's account will be used to identify the origin location and will automatically populate the Trip Origin field on the trip request.
8. Click Add to add the new trip location. The new trip location appears on the Trip Locations list.

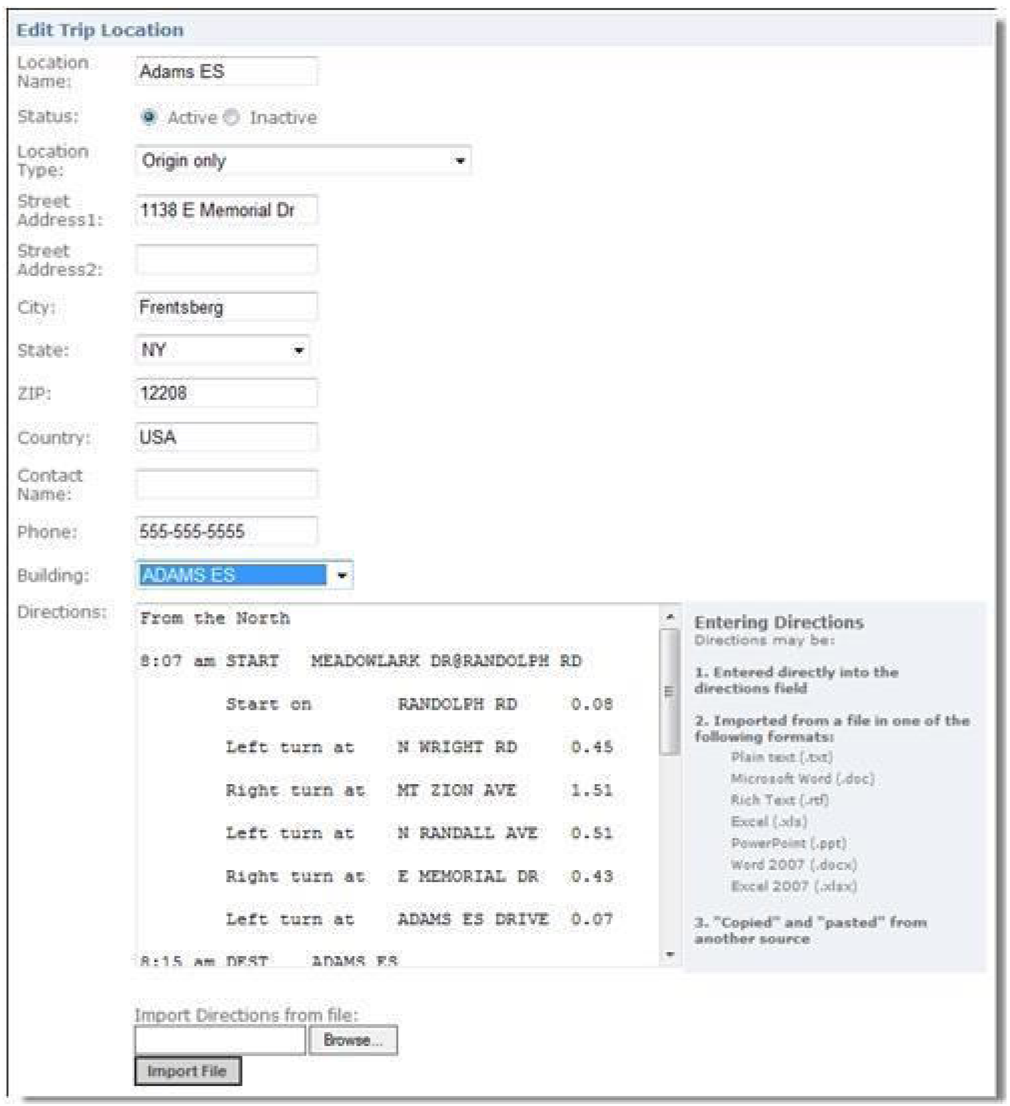
Editing a Trip Location

When a trip is being requested, the Requester is associated with an account. The building associated with the Requester's account will be used to identify the origin location and will populate the Trip Origin field on the Trip Request.

To edit a trip location:

Path:) Admin > System Lists > Trip Locations

1. In the System Lists: Trip Locations screen, click to display the blank search panel. Start typing the name of the trip location. As you enter text, the system will display a list of trip locations that comes closest to matching the text entered.
2. Select a trip location to display the Edit Trip Location screen.



3. Make the desired changes in the associated fields.

You can change the status to **Active** or **Inactive**.

> Trip Locations which have been checked as **Active** will appear for selection in drop-down lists throughout the application.
>
> If you change an **Active** status to **Inactive**, the status change will take effect once the status change has been saved. The inactive trip location name will no longer be actively tracked.

4. After you complete your changes, click to save your changes.

Deactivating a Trip Location

You can deactivate a trip location so it doesn't display as an option in the future.

To deactivate a trip location:

Path:) Admin > System Lists > Trip Locations

1. In the System Lists: Trip Locations screen, click to display the blank search panel.
2. Start typing the name of the trip location. As you enter text, the system will display a list of trip locations that comes closest to matching the text entered.
3. Select a trip location to display the Edit Trip Location screen.
4. Click Inactive in the Status field.
5. Click Update to save your changes.

Showing Inactive Trip Location Records in the Trip Locations List

Only the “active” trip location records display in the trip location list. You have the option of displaying the “Active” and “Inactive” trip location records in the trip locations list.

To show active and inactive trip location records in the Trip Locations list:

Path:) Admin > System Lists > Trip Locations

- Click Show Inactive in the Trip Locations screen to show the active and inactive records.

Setting Up Trip Types

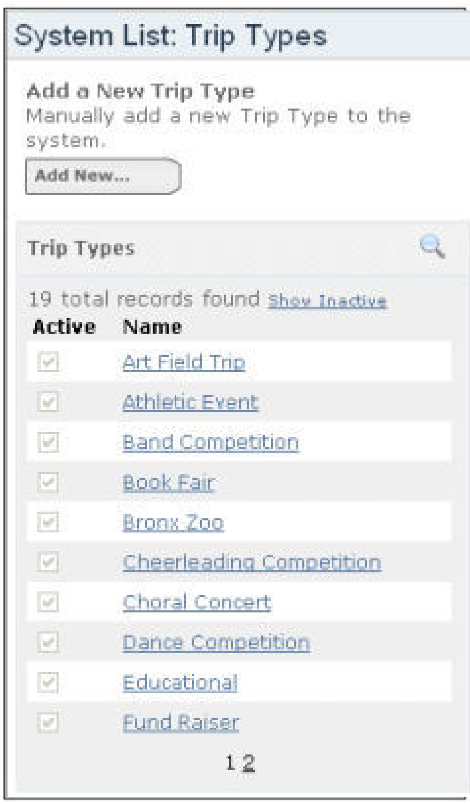
Trip Types are a way of grouping related trips together and may be used in conjunction with Activity Types (see, *Setting Up Trip Activity Types* on page 152) or used alone or not at all depending on your needs.

Adding a Trip Type

To add a trip type:

Path:) **Admin > System Lists > Trip Types**

1. Follow the above path to display the System List: Trip Types screen.



2. Click  to display a blank record.

3. Enter the name of the Trip Type in the Name field.

You have the option of selecting an approval path. If an approval path is assigned to the trip type, then that approval path will be used. If an approval path is not assigned to a trip type then the account's approval path will be used. If both the trip type and the account do not have an approval path, the trip will be automatically approved.

4. To select an approval path, click the Approval Path drop-down arrow to display a list of approval paths and select the approval path.
5. Select **Active** for the status. Trip Types which have been checked as Active will appear for selection in drop-down lists in the Trip Details.
6. Click  to add the new trip type. The new trip type appears on the Trip Type list.

Editing a Trip Type

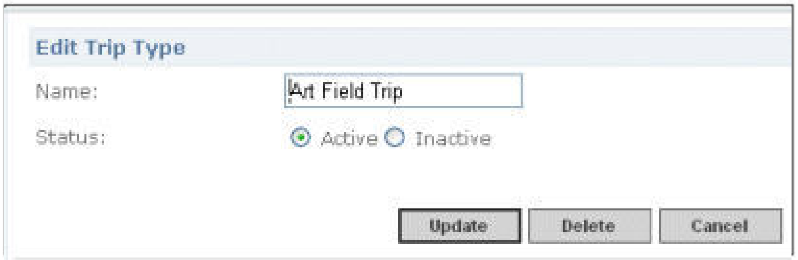
To edit a trip type:

Path:) Admin > System Lists > Trip Types

1. In the System Lists: Trip Type screen, click  to display the blank search panel.

2. Start typing the name of the trip type. As you enter text, the system will display a list of trip types that comes closest to matching the text entered.

3. Select a trip type to display the Edit Trip Type screen.



4. You can change the name and status of the trip type.

5. After you complete your changes, click  to save your changes.

Deleting a Trip Type

To delete a trip type:

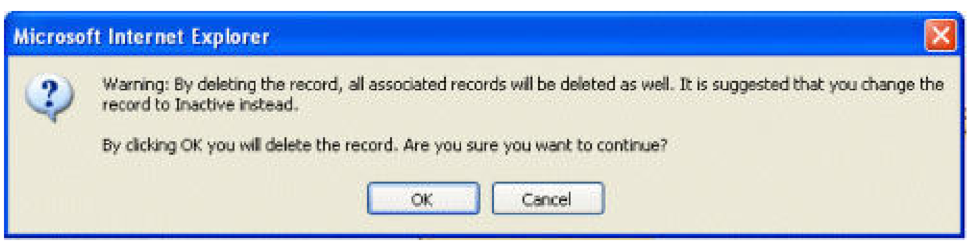
Path:) Admin > System Lists > Trip Types

1. In the System Lists: Trip Type screen, click  to display the blank search panel.

2. Start typing the name of the trip type. As you enter text, the system will display a list of trip types that comes closest to matching the text entered.

3. Select a trip type to display the Edit Trip Type screen.

4. Click .



5. Click **OK** to delete the trip type record. The record is deleted and its name is removed from the Trip Types list.

Deactivating a Trip Type

To deactivate a trip type:

Path:) Admin > System Lists > Trip Types

1. In the System Lists: Trip Type screen, click to display the blank search panel.
2. Start typing the name of the trip type. As you enter text, the system will display a list of trip types that comes closest to matching the text entered.
3. Select a trip type to display the Edit Trip Type screen.
4. Click Inactive in the Status field.
5. Click Update to save your changes.

Showing Inactive Trip Type Records in the Trip Types List

Only the “active” trip type records display in the trip type list. You have the option of displaying the “Active” and “Inactive” trip type records in the trip type list.

To show active and inactive trip type records in the Trip Types list:

Path:) **Admin > System Lists > Trip Types**

➢ Click Show Inactive in the Trip Types screen to show the active and inactive records.

Setting Up Trip Activity Types

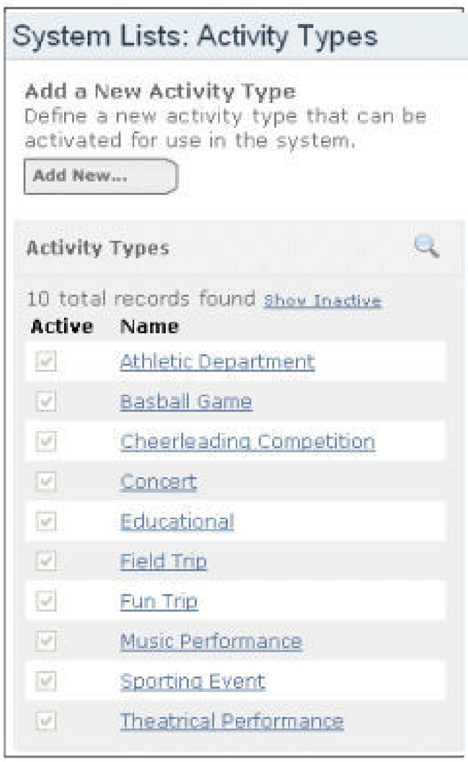
Activity Types may be used as a subset of Trip Types (see, *Setting Up Trip Types* on page 148) if your district requires the differentiation. For example, a Trip Type could be Sports and the Activity Type could be Soccer or Basketball, etc. They are used primarily in reporting. They may also be used instead of Trip Types or not used at all.

Adding an Activity Type

To add an activity type:

Path:) **Admin > System Lists > Activity Types**

1. Follow the above path to display the System List: Activity Types screen.



2. Click **Add New...** to display a blank record.

3. Enter the name of the Activity Type in the Name field.

4. Select **Active** for the status. Activity Types which have been checked as Active will appear for selection in drop-down lists in the Trip Details.

5. Click **Add** to add the new Activity type. The new activity type appears on the Activity Type list.

Editing an Activity Type

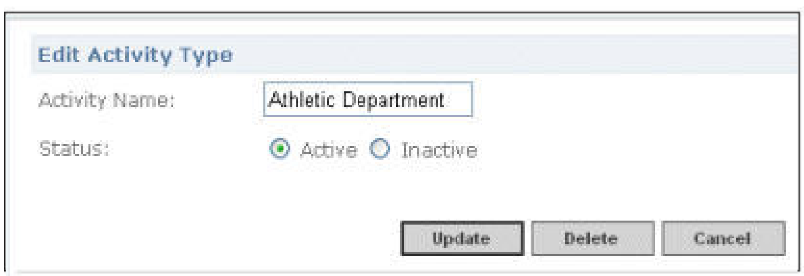
To edit an activity type:

Path:) **Admin > System Lists > Activity Types**

1. In the System Lists: Activity Type screen, click  to display the blank search panel.

2. Start typing the name of the activity type. As you enter text, the system will display a list of activity types that comes closest to matching the text entered.

3. Select an activity type to display the Edit Activity Type screen.



4. You can change the name and status of the activity type.

5. You can change the status to **Active** or **Inactive**.

Activity Types which have been checked as **Active** will appear for selection in Trip Details.

If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive activity type will no longer be actively tracked.

6. After you complete your changes, click Update to save your changes.

Deleting an Activity Type

To delete an activity type:

Path:) Admin > System Lists > Activity Types

1. In the System Lists: Activity Type screen, click  to display the blank search panel.
2. Start typing the name of the activity type. As you enter text, the system will display a list of activity types that comes closest to matching the text entered.
3. Select an activity type to display the Edit Activity Type screen.
4. Click Delete.

5. Click **OK** to delete the trip type record. The record is deleted and its name is removed from the Trip Types list.

Deactivating an Activity Type

To deactivate an activity type:

Path:) **Admin > System Lists > Activity Types**

1. In the System Lists: Activity Type screen, click to display the blank search panel.
2. Start typing the name of the activity type. As you enter text, the system will display a list of activity types that comes closest to matching the text entered.
3. Select an activity type to display the Edit Activity Type screen.
4. Click Inactive in the Status field.
5. Click Update to save your changes.

Showing Inactive Activity Type Records in the Activity Types List

Only the "active" activity type records display in the activity type list. You have the option of displaying the "Active" and "Inactive" acitivity type records in the activity type list.

To show active and inactive activity type records in the Activity Types list:

Path:) **Admin > System Lists > Activity Types**

- Click Show Inactive in the Activity Types screen to show the active and inactive records.

Setting Up Accounts

Once you have completed the building records, the charge basis, the invoice charges (if applicable), and the fiscal period, you are ready to set up the accounts.

Accounts contain certain information required for requesting field trips. They allow the Transportation department to identify a school, district, program or other entity and obtain contact person and contact method information on that entity, identify what types of charge basis apply globally to the entity, set a budget threshold for the entity, and identify who can approve requests for the entity.

An entity could be a school or could be a division within the school (performing arts, language, ROTC, athletic department). Within the division, there may be one or more requesters and approvers authorized to request and approve trips for that division. For example, a school may have many athletic programs, with many coaches.

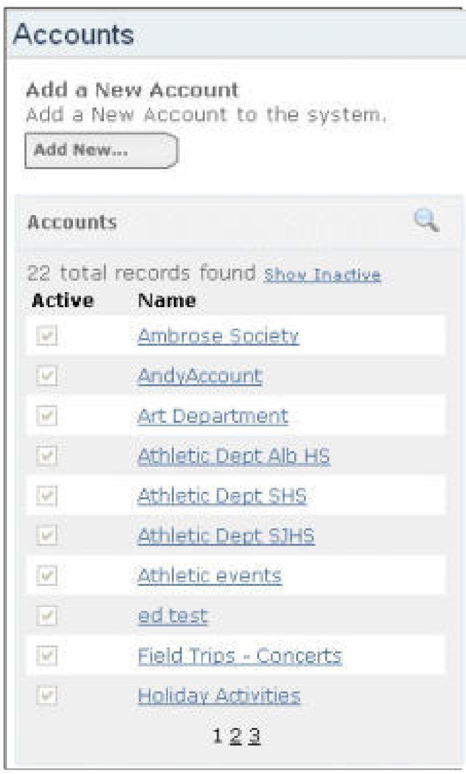
Adding Account Records

An account is the budget item you want to charge field trips against. For example, if your organization breaks the field trip budget down by school and then further by group, you might enter the name of the school and the group name in the Account field, as in St. Ambrose Athletic Dept or St. Ambrose Class Trips.

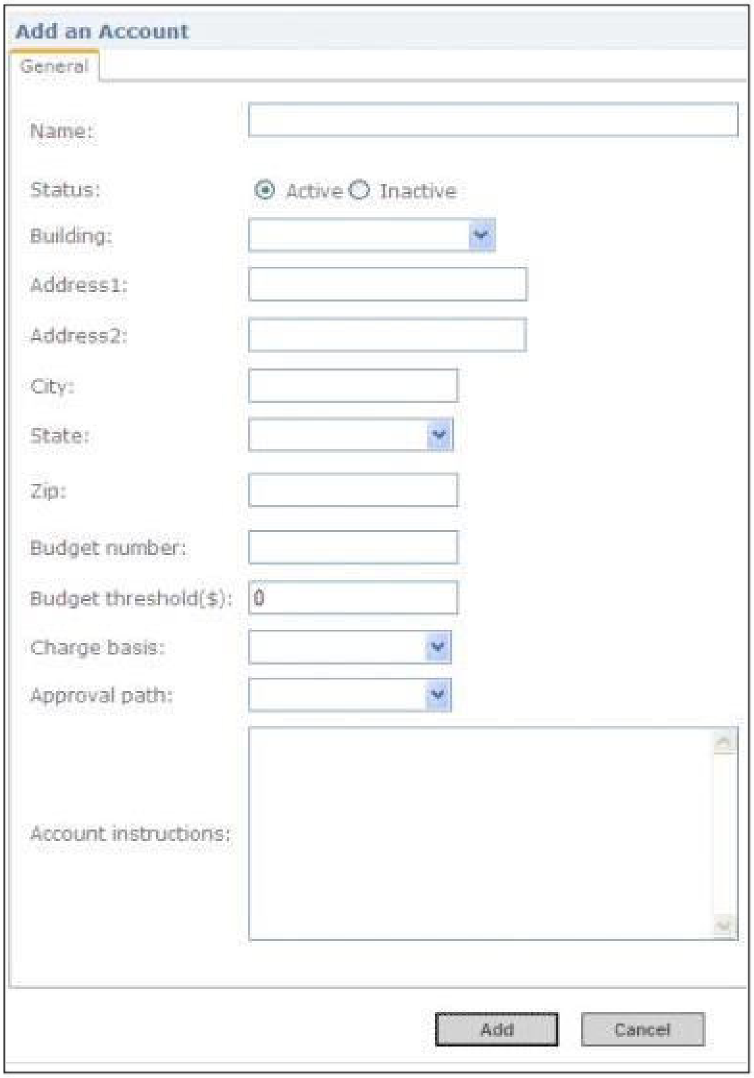
To add account records:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.



2. Click to display a blank record.



3. Enter a name for the account.
4. Select Active for the status. An inactive account cannot have new trips requests assigned to it. Trips already assigned to an account which has been made inactive will be available for financial transactions and reports.
5. Complete the fields by typing the information or selecting from drop-down lists. If you need help with any of these fields, see the field descriptions below.

   Building
   This is the building associated with this account.

   Address, City, State and ZIP
   These fields will be automatically filled in from the information contained in the Building record.

Budget Number
This is your internal code (if any) associated with this account. This number displays on the invoice.

Budget Threshold
The amount limit at which the system emails the Requester. For example, if you enter $150 in this field, the system sends an email to the Requester when there is $150 or less remaining in the budget for this account.

Charge Basis
A charge basis can be selected from a drop-down list of available charge basis records. See, *Adding a Charge Basis* on page 35. This is the charge basis that will be associated with this account. This charge basis will be applied to all trips charged to the account. The charge basis can be overridden during the trip request process.

Approval Path
An approval path can be selected from a drop-down list of available approval path records (see, *Adding a New Approval Path* on page 168). This is the approval path that will be associated with this account. This approval path will be applied to all trips charged to the account.

Account Instruction
Any special instructions associated with the account.

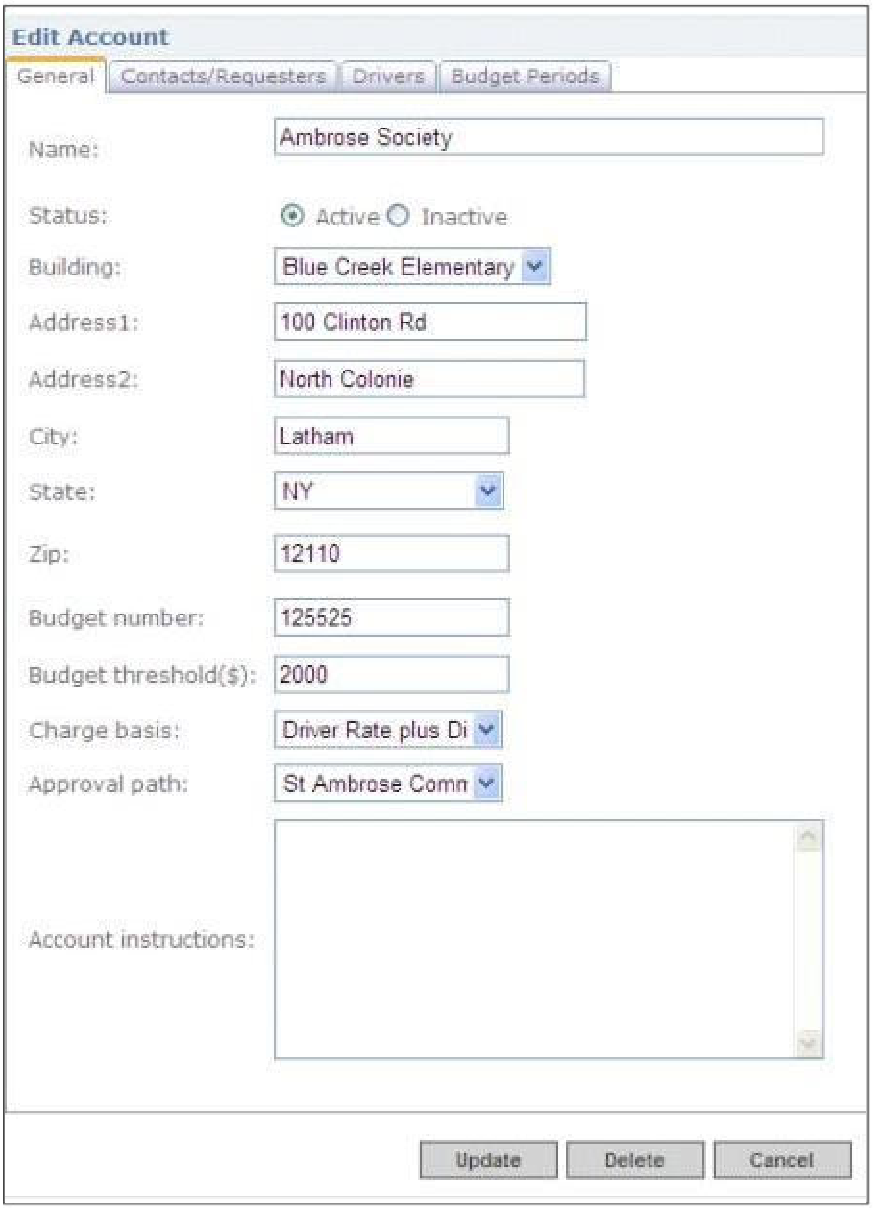
6. When you have completed these entries, click Add to save the new record.

Editing Account Records

To edit Transportation account records:

Path:) Admin > Accounts

1. Follow the above path to display the Accounts screen.
2. Click on the account name that you want to edit.



3. Edit the fields by typing in the new information or selecting from drop-down lists. If you need help with any of these fields, see *Adding Account Records* on page 157.

4. Click when you have finished making changes to the account record.

Deleting an Account Record

To delete an account record:

Path:) Admin > Accounts

1. Follow the above path to display the Accounts screen.
2. Click on the account that you want to delete.

   Note: *It is recommended that an account record is made Inactive and not deleted because when you delete this record, all associated records will be deleted as well.*

3. Click Update and then click Delete .

4. Click **OK** and the Transportation record and all associated records are deleted.

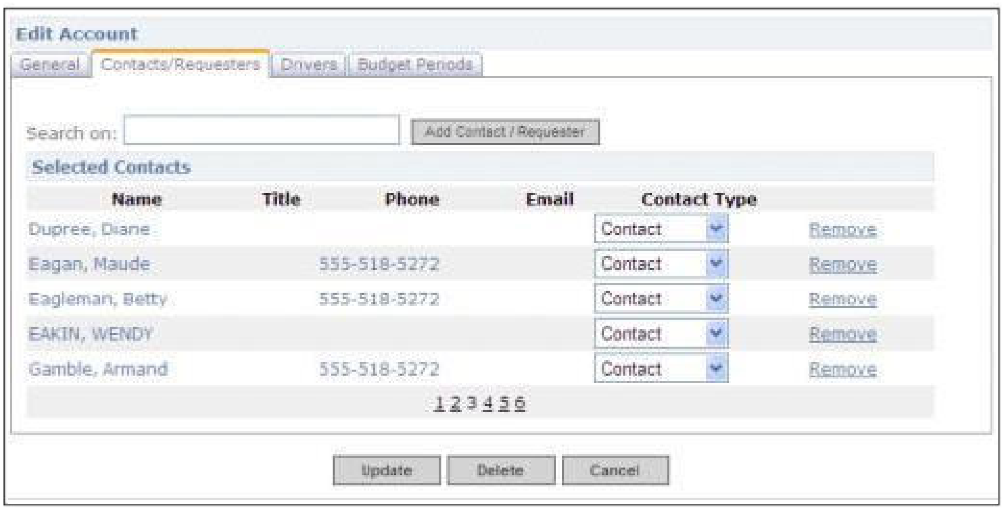
Adding Contacts/Requesters to an Account Record

Once you have set up an account record, you can add contacts and requesters to that record. A contact is a person who has a reason to be notified of the status of a particular field trip. A requester is the person requesting a trip. A person can be both a contact and a requester.

To add contacts/requesters to an account record:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.
2. Click on the account name that the contacts/requesters are to be added to. The Edit Account screen displays.
3. Click the Contacts/Requesters tab.



4. Start typing a name into the **Search on** field. As the system finds a match, it displays those matches. The list of available names is based on the employees in the system.

5. Click on a name to select it.

6. Click the Contact Type drop-down button for the new contact/requester.

7. Select either contact, requester or both.

8. If you want to remove a name from the list, click Remove next to the name that you want removed.

9. Click when you are finished making entries.

Editing Account Record Contacts/Requesters

In the Edit Account screen described below, you can change whether an employee is a contact, requester or both. To change information such as title, phone or email, see *Finding & Editing an Employee's Record* on page 83.

To edit a contact/Requester:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.

2. Click on the account name that contains the contacts/requesters that you want to work with. The Edit Account screen displays.

3. Click on the Add Contact / Requester tab.

4. Click the Contact Type drop-down button for the contact/requester you want to edit.

5. Select either contact, requester or both.

Deleting Account Record Contacts/Requesters

You can delete a contact or requester from the system only if you have not used it in any trip record. If you try to delete a contact or requester that is attached to one or more trip records, the system prevents you.

1. Follow the above path to display the Accounts screen.
2. Click on the account name that contains the contacts/requesters that you want to delete. The Edit Account screen displays.
3. Click on the Add Contact / Requester tab.
4. Highlight the name that you want to delete and click Delete.

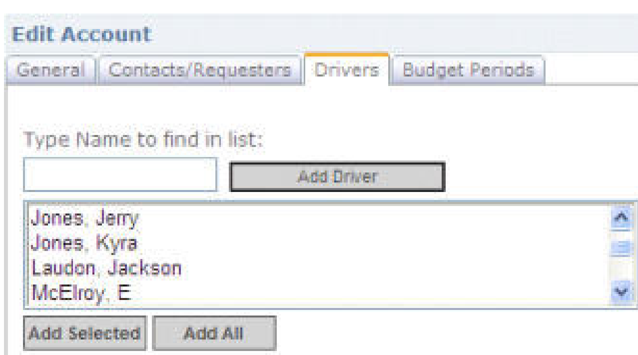
Adding Drivers to An Account

This feature allows you to add specific drivers to specific accounts. You will then be able to filter drivers by account when scheduling a trip (see, *Scheduling a Trip Disallowing for the Driver's Time to/from a Garage* on page 199).

To add drivers to an account:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.
2. Click on the account name that you will be adding drivers to.
3. Click on the Drivers tab.



Only employees that meet designated criteria will appear in this list

The following criteria determines what employee names appear in the list:

- Only employees designated as "Driver" will appear in the list. The "Driver" checkbox in the Employee Record must be checked.
- Only active employees/drivers will appear on the list.
- "Appear in driver queue" must be checked in the Employee Record.

> **Note:** *If any of the pertinent criteria are no longer met, the employee will not show in the list of drivers for the account.*

4. Type a name into the “Type Name to find in list” field and when the system finds a match, it displays those matches.
5. Select a single name by clicking on the name or select multiple names by using the Ctrl key.
6. Click for a single name or Add Selected for multiple names to add those driver’s names to the account and display them as shown below:

Name	
Arienti, Todd	Remove
Jones, Jerry	Remove
Jones, Kyra	Remove
Laudon, Jackson	Remove
McElroy, E	Remove
1 2 3	

7. Click when you are finished adding drivers.

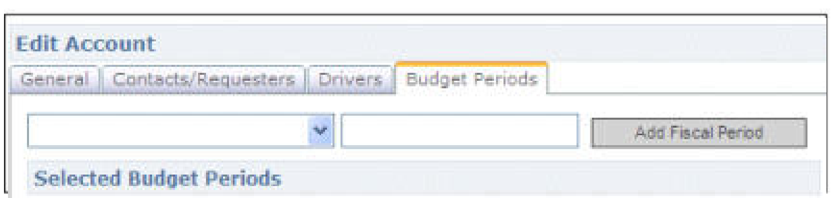
Adding a Budget Period

The budget period refers to the budget amount allotted for a fiscal period. A fiscal period is the term of your budget which is usually the school year for districts. Complete your fiscal period entries before adding a budget period as described in *Setting Up the Fiscal Periods* on page 45.

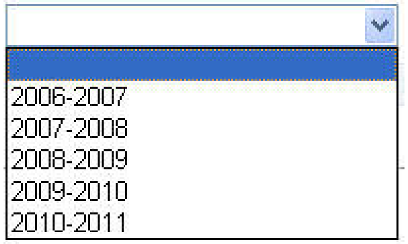
To add a budget period:

Path:) **Admin > Accounts**

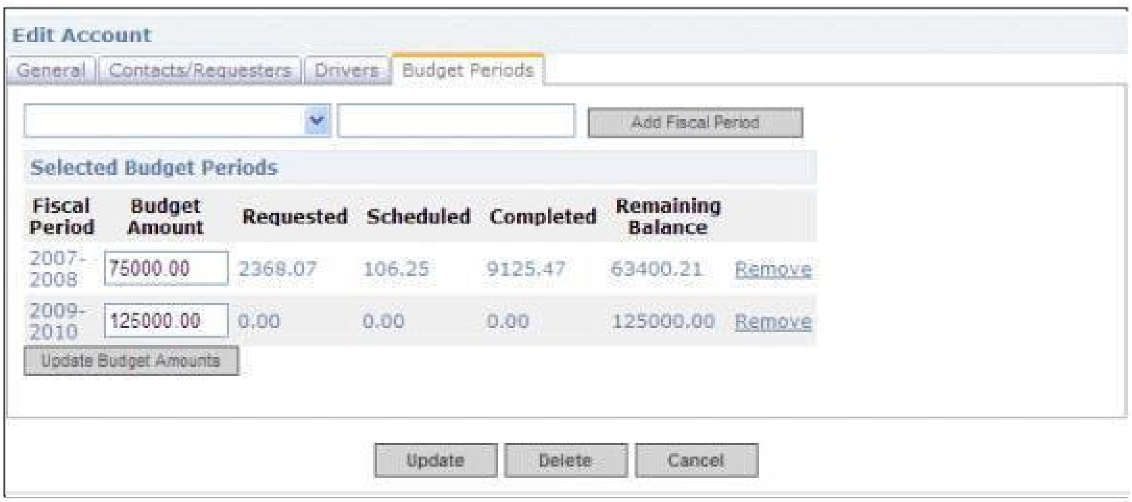
1. Follow the above path to display the Accounts screen.
2. Click on the account name that you will be adding a budget period to.
3. Click on the Budget Periods tab.



4. Click the drop-down box to display the fiscal periods you have already entered. See, *Adding a Fiscal Period* on page 45 for information on how to add a fiscal period.



5. Select a fiscal period from the list.
6. Click .



Budget Amount
Enter the amount allowed for in this budget item for this account.

7. Click to update the remaining balance.

Requested
Dollar total of all trips assigned to this account in the requested stage.

Scheduled
Dollar total of all trips assigned to this account when a trip is scheduled.

Completed
Dollar total of all trips assigned to this account when the trip has been completed.

Remaining Balance
Remaining balance = budget amount - (completed + scheduled + requested).

8. When you are finished making entries, click Update .

Setting Up Approval Paths

When a trip request is submitted, there may be several individuals at various levels responsible for reviewing the request to determine whether it should be approved. Some districts have one level of approval, where once a trip is approved by an individual it will immediately go into the scheduling phase. While other districts require that there are several levels of approval required before a trip is scheduled.

Adding a New Approval Path

An employee needs to be associated with the User account in order for them to appear as an available approver. The following procedures need to be performed:

- A user record is added with an employee, see *Setting up a New User* on page 272.
- An approval path is created with an approver. The approver is the User but the list displays the user's attached employee, see *Adding a New Approval Path* on page 168.
- An account is created that can have an attached Approval Path, see *Adding Account Records* on page 157.

To add a new approval path:

Path:)   Admin > Approval Paths

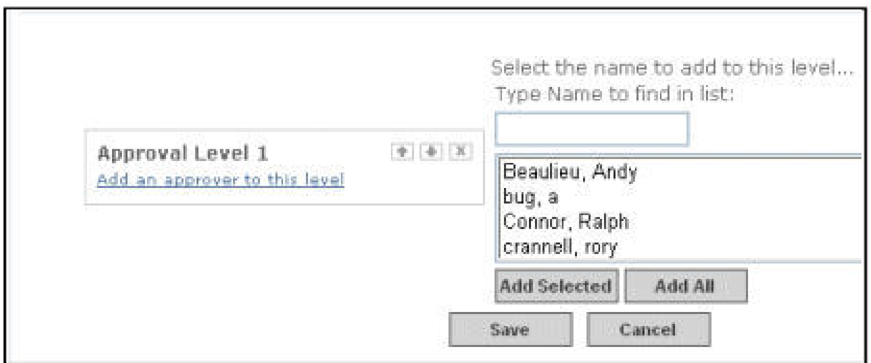
1. Follow the above path to display the Approval Paths screen.

2. Click .

3. Enter the name of the Approval Path (i.e.: Athletic Dept., Music Dept. etc.).

4. Click Add a New Approval Level .

5. Click Add an approver to this level



This is a list of users that belong to user groups who have trip approval privleges.

6. Start typing a name into the blank name field. As the system finds a match, it displays those matches. You can select a single name by clicking on the name or select multiple names by using the **Ctrl** key

   When you are finished selecting names, click to add only the selected name(s) or click Add All to add all the names.

You can repeat steps 5 & 6 to add as many approvers and approval levels as needed for your approval path process.

7. Click Save to save the approval path. The next step is to assign an approval path to an account (see, *Assigning an Approval Path to an Account* on page 172).

Assigning an Approval Path to an Account

The next step in the approval path process is to assign approval paths to one or more accounts. This step is optional. If you do not want to assign accounts by way of the Approval Path process, you can associate an account to a default approval path from within an individual account record. See, *Adding Account Records* on page 157.

Path:) Admin > Approval Paths

To assign an approval path to an account:

1. Follow the above path to display the Approval Paths screen.

2. Click .

3. Use the drop-down button to display a list of Approval Paths and select an approval path from the list.

   On the left side of the **Associate Approval Path to Accoun**t screen are a list of **Unassigned Accounts**. This list contains all active accounts that are not currently associated with an approval path.

4. You can select a single account by clicking on the account or select multiple accounts by using the CTRL key.

   When you are finished selecting accounts, click Add Selected to add only the selected name(s) or click Add All to add all the names.

   The selected accounts are moved from the **Unassigned Accounts** to the **Accounts Assigned to this path**.

5. When you are finished assigning accounts to an approval path, click Save .

Chapter 3

Working with Trip Requests

Topics In This Chapter:

Before You Begin

In order to complete all the stages in the trip request process and receive email messaging, the following information should be entered in the following order before the trip request process begins:

- *Setting the System Options* on page 6
- *Setting Up Email* on page 278
- *Setting Up Building Records* on page 90
- *Setting Up the Financial Records* on page 34
- *Setting Up Trip Locations* on page 141
- *Setting Up Trip Types* on page 148
- *Setting Up Approval Paths* on page 168
- *Setting Up Accounts* on page 156
- *Setting Up Driver Assignment Rules* on page 103
- *Adding a Vehicle Record* on page 94
- *Setting Up User Groups & Users* on page 264

Email Messaging & Trip Request Stages

One of the most important features of Triptracker is email messaging. Triptracker messaging depends upon the following:

- Setting your email options properly. See*Setting Up Email* on page 278*Setting Up Email* for these settings.
- Having your message templates set up. See, *Setting Up Email Message Templates*, on page 281 for a description of this process.

Depending upon the stages selected for each recipient in your email option settings, the system will potentially send the following emails:

Table 1.

Requester
Trip Submitted
Trip Approved/Rejected
Trip Cancelled
Trip Scheduled

Table 1.

Requester
Trip Billed
Trip Closed

Table 2.

Account Contact
Trip Submitted
Trip Approved
Trip Cancelled
Trip Billed
Trip Closed
Budget Alerts
Trip Payments

Table 3.

Approver
Trip To Approve
Trip Cancelled

Table 4.

Scheduler
Trip To Schedule
Trip Cancelled

Table 5.

Billing Clerk
Trip ready for Billing
Trip Cancelled

Table 6.

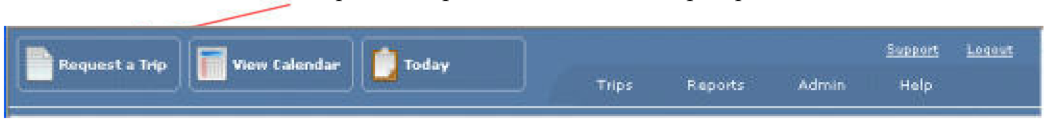
Driver/Monitor/Aide
Trip Scheduled To Them
Trip Cancelled

Ways to Initiate a Trip Request

In order to facilitate the initiation of trip requests when it is most needed, we have provided a way to access the Trip Request screen from the following areas of Triptracker:

Application Header

Click the Request a Trip button to initiate a trip request.

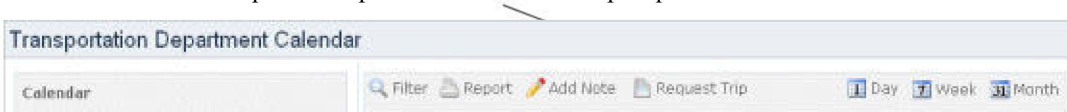


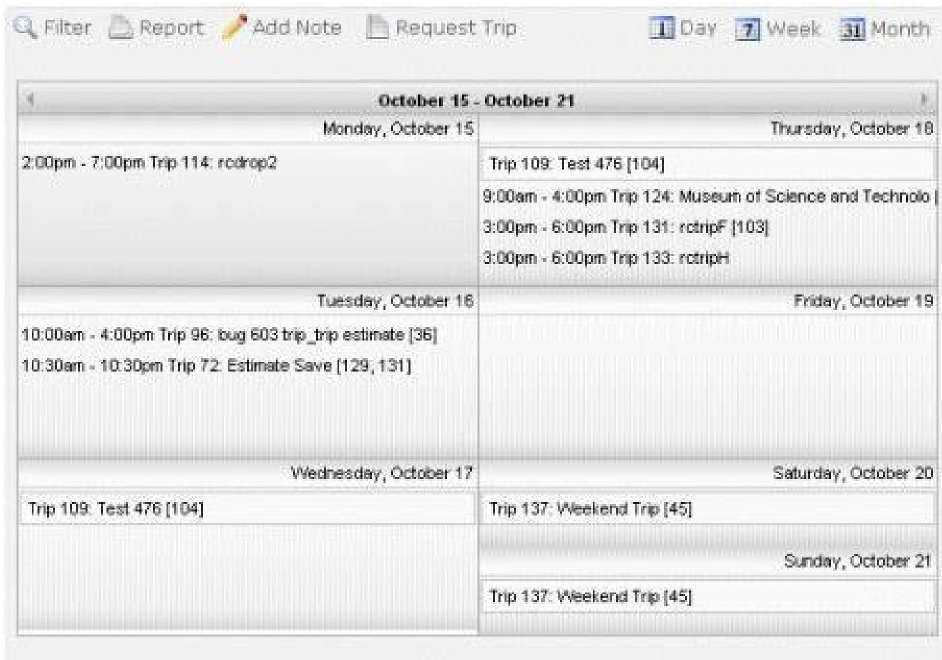
Main Menu

Click the Request Trip link to initiate a trip request.

Transportation Department Calendar

Click the Request a Trip Button to initiate a trip request.



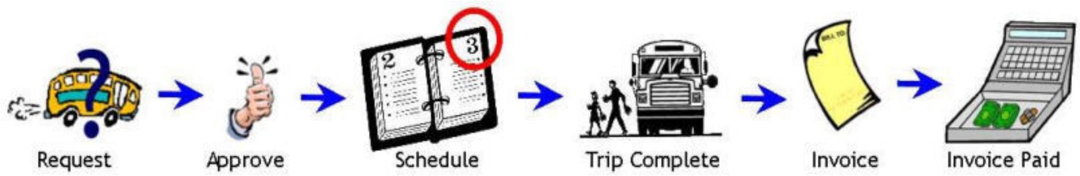


Double- click on a day in the calendar
to initiate a trip request.

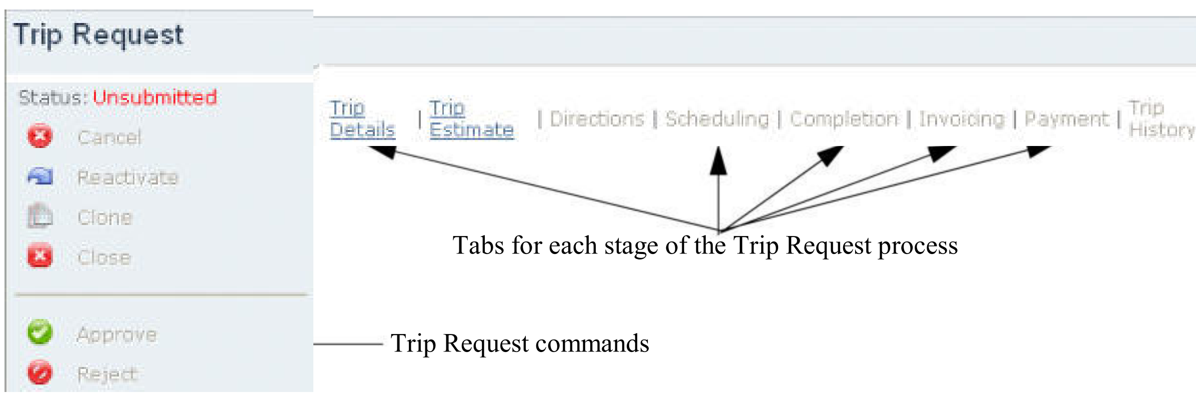
Users assigned request permissions can request a trip by selecting a day from the weekly or monthly calendar or the time of day from the daily calendar view. Selecting a day and time will auto populate the trip data field and departure time field.

Requesting a Trip

The Trip Request process consists of a number of stages: Trip Request Submitted, Trip Approved, Trip Estimates, Directions (optional), Trip Scheduled, Trip Complete, Trip Billed/Invoiced, and Trip Payment.



The Trip Request screen (below) contains the tabs and commands that allow you to work your way through each stage of the trip request process. Different tabs and commands become active as you progress through each stage.



The following trip request tasks are covered in this section:

Adding a Trip Estimate to a Trip Request

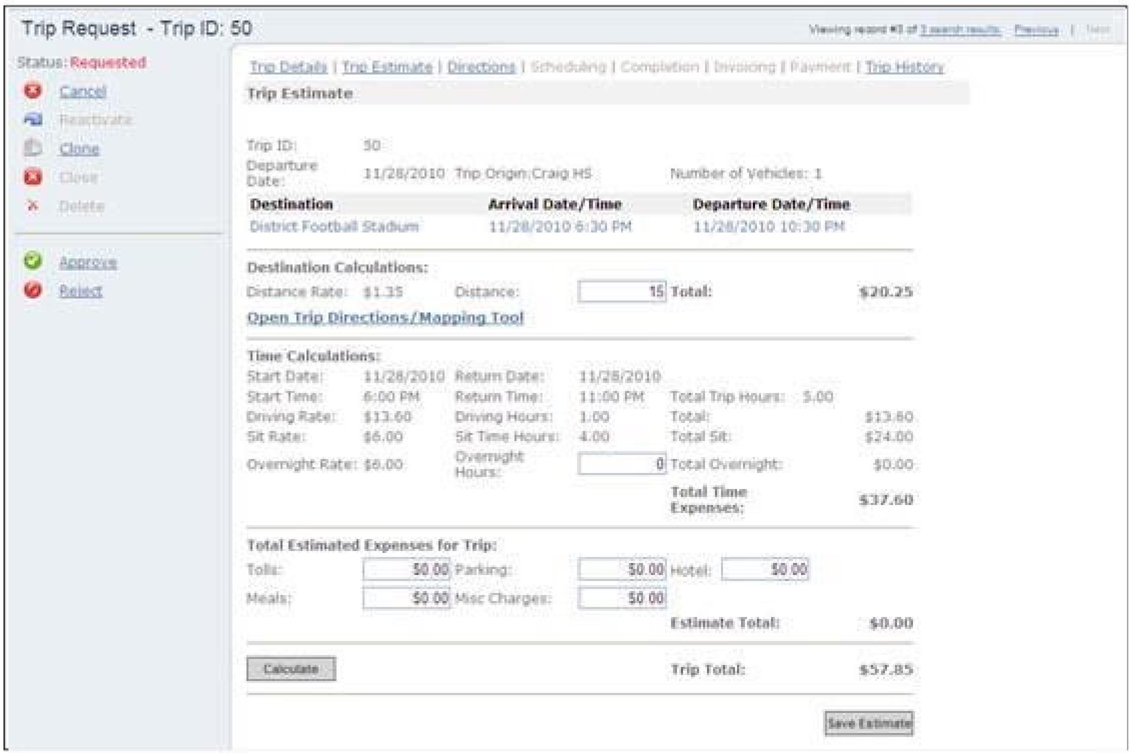
The estimating function uses the account information you have already entered to give you an idea of the trip cost. The more estimated expenses you enter, the more precise the trip estimate will be.

To add a trip estimate to a trip request:

Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.

2. Select Trip Estimate to display the Trip Request - Trip Estimate screen. If this is a one-way trip, it will be indicated by the text **One- Way Trip** next to the **Trip ID** and only **Destination: Arrival: Date/Time** is displayed.



3. Complete the fields on the Trip Estimates tab. If you need assistance completing these fields, please review the field descriptions below.

Departure Date
The date the trip departed from the origin.

Destination Calculations

Distance Rate
The charge rate per mile/kilometer. This field is populated from the Charge Basis, "Default Distance Rate" field if the account has a charge basis linked to it. *Adding a Charge Basis* on page 35.

Distance Rate is only taken from the charge basis if the account has a charge basis linked to it.

Distance
The estimated distance from the origin to the destination and back including any other mileage that might occur during the course of the trip. This could be compared later to the completion stage where a beginning and ending odometer reading is entered.

Open Trip Directions/Mapping Tool

This link provides access to a mapping tool that allows you to display point-to-point directions and a map for a trip. The generated data can be used to get a distance estimate for the trip and to generate directions for the driver. For more information, see

Time Calculations

Start Date
The date the trip/vehicle leaves the origin.

Return Date
The date the trip/vehicle returns to the origin.

Start Time
The time the trip/vehicle leaves the origin.

Return Time
The time the trip/vehicle returns to the origin.

Total Trip Hours
The total number of hours the trip is estimated to take based on the dates along with the start and return times.

Driving Rate
The dollar amount per hour that will be used in the calculation of the driver cost for the trip.

Driving Hours
The driving hours equal the total trip hours - sit time hours.

Total
The total equals the driving rate x driving hours.

Sit Rate
The dollar amount per hour that will be used in the calculation of the driver sit time cost for the trip.

Sit Time Hours
The sit time hours equal the total trip hours - regular driving hours.

Total Sit
The total sit equals the sit rate x sit time hours.

Overnight Rate
The dollar amount per hour that will be used in the calculation of the driver overnight cost for the trip.

Overnight Hours
Enter the dollar amount for eight hours of sleep time.

Total Overnight
Total overnight equals the overnight rate x overnight hours.

Total Time
Total time equals the driving total + sit time total + overnight total.

Estimated Expenses

Tolls/Parking/Hotel/Meals/Misc Charges
Enter the dollar amount for all toll charges etc.

4. Click Calculate and the system displays the estimated total cost of the trip.
5. Click Save Estimate to save the estimate.

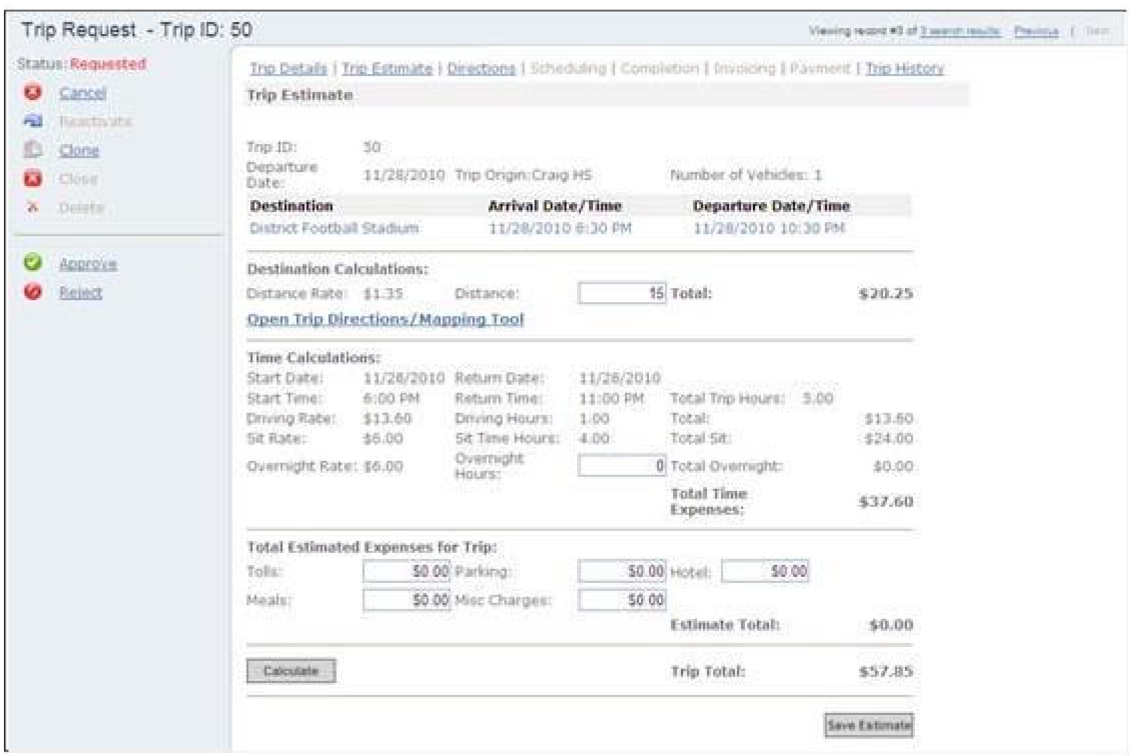
Using the Trip Directions/Mapping Tool

The trip directions/mapping tool allows you to generate point-to-point directions and a map for a trip. The mapping tool takes any valid origin and destination information already entered for a trip (see, *Adding a Trip Location* on page 141) and uses that information to generate point-to-point text directions along with a map that can be manipulated using standard navigation controls. If necessary, the origin and destination information can also be edited within the trip directions/mapping tool screen. Once the trip directions have been generated, you can click a button to have the estimated distance pulled into the Distance field of the Trip Estimate screen and used for distance calculations (see *Using the Estimated Distance for the Trip* on page 188). You can also click a button and have the trip directions attached to the trip request and used for driver direction (see *Attaching Trip Directions to the Trip Request* on page 189).

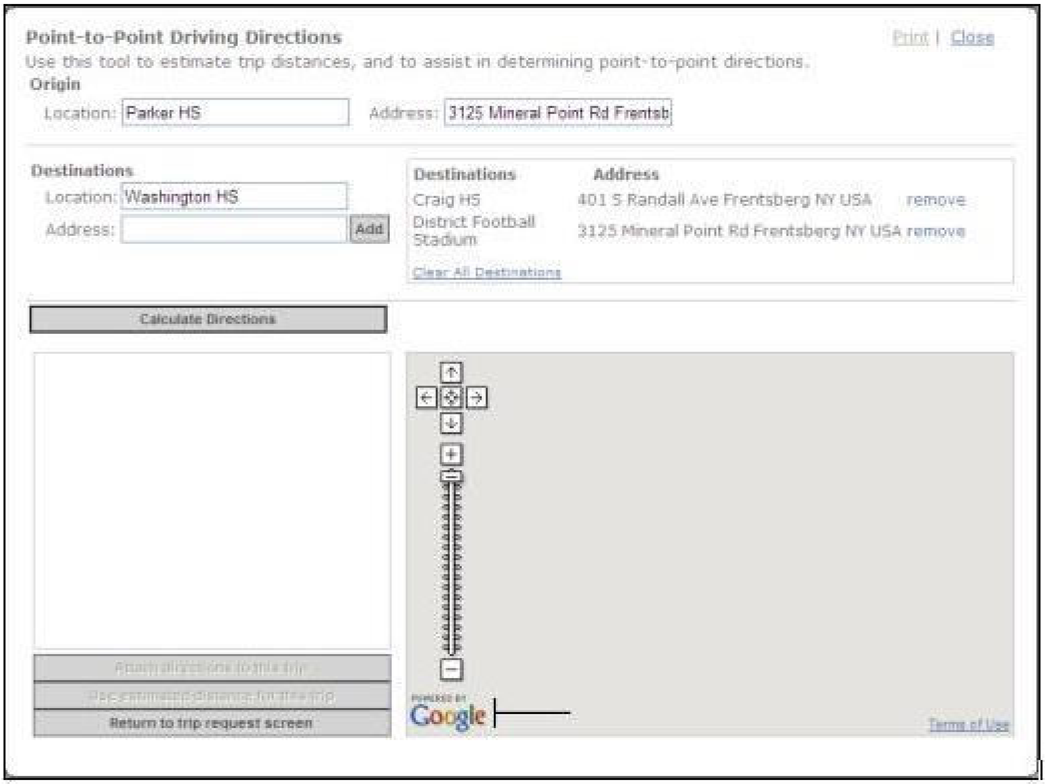
To use the trip directions/mapping tool:

Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select Trip Estimate to display the Trip Request - Trip Estimate screen.



3. Click Open Trip Directions/Mapping Tool to display the Mapping Tool screen.



Origin's Location and Address   Destination/Address Box

The mapping tool populates the Origin's Location and Address fields and the Destination/Address box with the origin and destination information entered in the Trip Details screen.

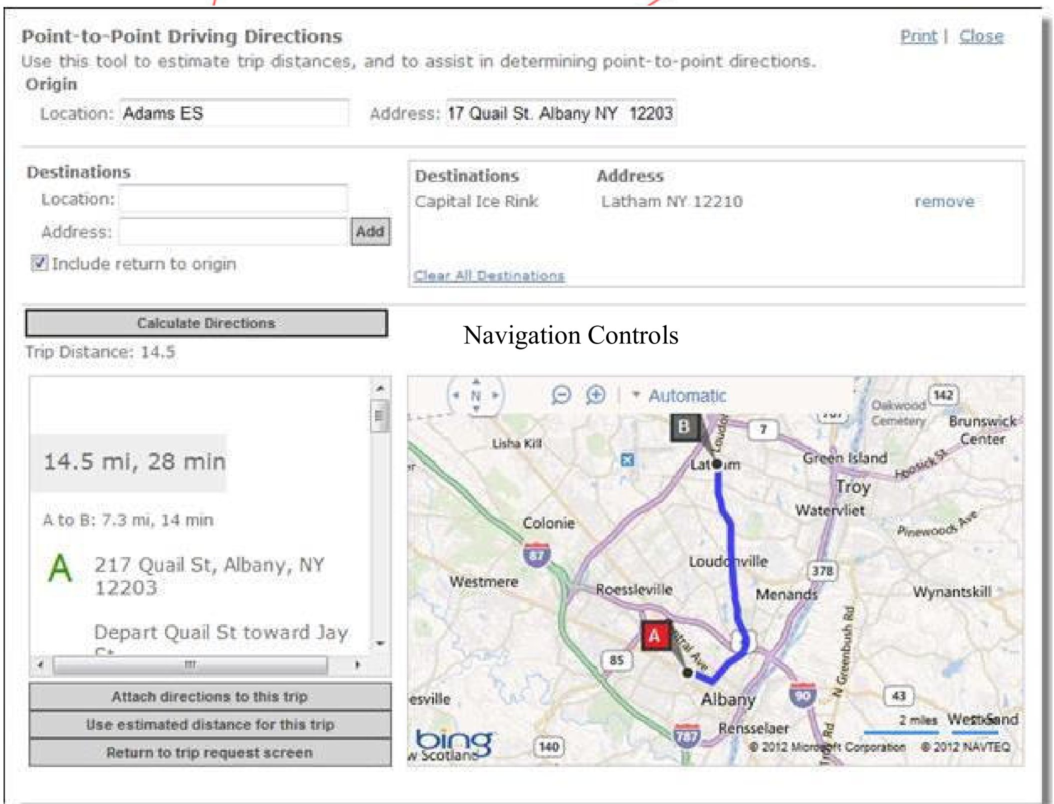
4. To add a destination, enter the location and address. Click Add to add the destination information to the Destination/Address box.

5. To remove a Destination/Address, click remove next to the corresponding information that you want to remove.

6. Click Calculate Directions to display point-to-point trip directions and a map.

Estimated Trip Distance

Unchecked and disabled when the trip is one-way



Origin

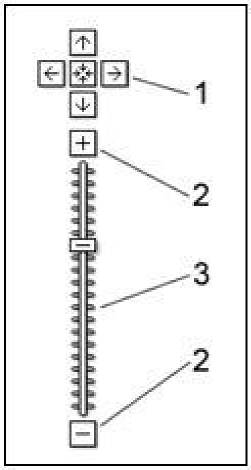
Destinations

See, *Attaching Trip Directions to the Trip Request*

See, *Using the Estimated Distance for the Trip*

You can continue to enter destinations and they will be appended to the text directions and map. The estimated trip distance will also be updated.

Navigation Controls

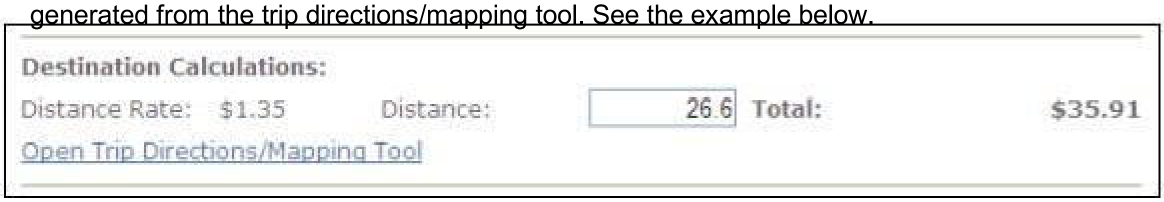


1. **Arrows** - Click the appropriate arrow buttons to move the view north, south, east or west. Click [center button] to return to your original view.
2. **Zoom** - Click + to zoom in on the center of the map. Click - to zoom out.
3. **Zoom slider** - Drag the zoom slider up or down to zoom in or out incrementally.

7. To print the trip directions and map, click Print to display the Print dialog.
8. Choose a printer and click Print.

Using the Estimated Distance for the Trip

1. To have the estimated trip distance pulled into the Distance field of the Trip Estimate screen and used to estimate the distance for the trip. Click Use estimated distance for this trip .
2. A confirmation message displays. click **OK**.
3. Click Return to trip request screen . You will see that the Distance field has been updated.
4. Click Save Estimate . The destination calculations are updated using the estimated distance generated from the trip directions/mapping tool. See the example below.



Attaching Trip Directions to the Trip Request

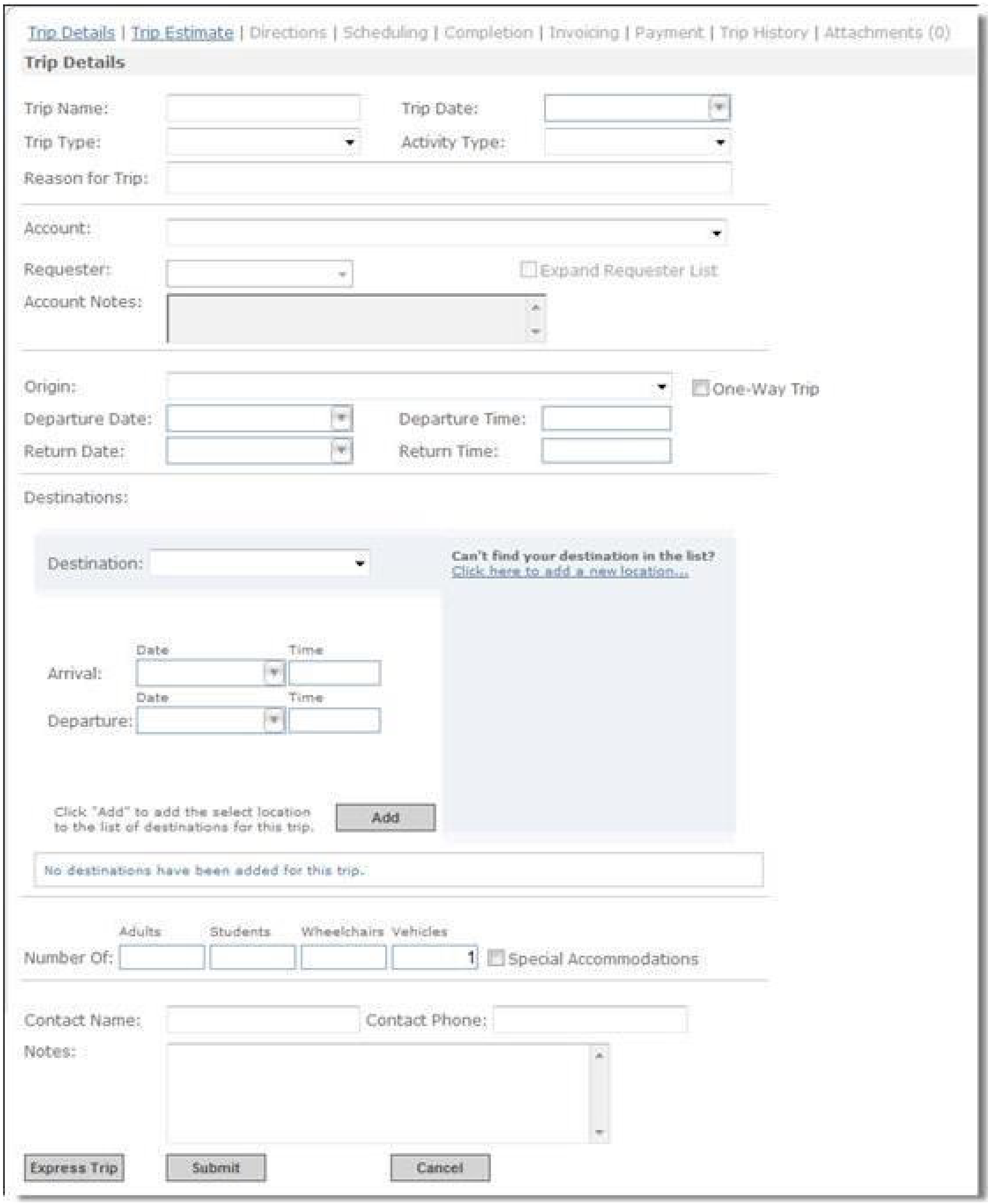
1. To have the trip directions attached to the trip request and used for driver directions, click Attach directions to this trip .
2. A confirmation message displays. click **OK**.
3. Click .
4. Click the Directions tab. The Directions screen will indicate that there are point-to-point directions attached.
5. To view the directions, click View these directions and the Trip Directions/Mapping Tool screen is displayed.
6. Click and the text directions and map are displayed.
7. To print the trip directions and map, click Print to display the Print dialog.
8. Choose a printer and click Print .

Submitting a Trip Request

To submit a trip request:

Path:) Trips > Request a Trip

1. Follow the above path to display the Trip Request - Trip Details screen.



Notice that there are only 2 tabs active, Trip Details and Trip Estimate. The other links (i.e. Directions, Scheduling etc.) will become active as you progress through the trip request process.

The first stage of the trip request process involves entering trip details and submitting the trip details/trip request.

2. Complete the fields on the Trip Details tab. If you need assistance completing these fields, please review the field descriptions below.

Trip Name
Enter a unique name for this trip in this field. This is the name that will display on the Calendar when you complete the trip request.

Trip Date
Enter or select from the calendar the date that the trip is going to take place. All the date fields will auto populate with this date.

Trip Type
Select the type of trip from the Trip Type drop-down list. See, *Setting Up Trip Types* on page 148 to learn how trip types are set up.

Activity Type
Select the type of activity from the Activity Type drop-down list. This field describes the purpose of the trip. These entries display based on the trip activities you entered. See, *Setting Up Trip Activity Types* on page 152 to learn how activity types are set up.

Reason for Trip
Enter the reason that the trip is being taken.

Account
You select the account that will be used for this trip from the Account drop-down list. The balance remaining in the account will be displayed. See, *Setting Up Accounts* on page 156 and *Setting Up Driver Assignment Rules* on page 103.

Requester

Note: *The Requester field will be grayed out until there is an account determined.*

Once an account has been determined, select the name of the person requesting the trip from the Requester drop-down list. Names that appear in the Requester drop-down list are from the employee records. See, *Setting Up Driver Assignment Rules* on page 103.

Users who are Super-Users have the ability to override the requester name that displays in the Requester field. When the “Expand Requester List” option is left unchecked, the names of the requesters associated with the account will display. When this option is checked, the list of names displayed in the Requester list will be governed by the status of the System Option, “Show all Employees Requester field” as follows:

Note: *For more information on “Show all Employees in Requester field”, see “Setting the System Options” in the Triptracker User’s & Administrator’s Guide or consult the Online Help.*

- When “Show all Employees in Requester field” is **unchecked**, the expanded list of names will contain only active non-Transportation employees.
- When “Show all Employees Requester field” is **checked**, the expanded list of names will contain all active Transportation and non-Transportation employees.

Account Notes
Displays any notes entered on the account. This field is read only.

Origin
Select the origin of the trip from the Origin drop-down list. This is the place the trip starts. These entries display based on the trip origin locations you entered. See, *Setting Up Trip Locations* on page 141.

One -Way Trip
Allows trips to be booked and invoiced as one-way trip without a return leg. When the One-Way Trip box is checked, the Origin: Return Date and Return Time fields are no longer displayed. Once a destination is selected, only the Arrival: Date/Time needs to be entered. The Departure: Date/Time is automatically populated by the same values as the Arrival: Date/Time. When you click **Add**, the Destination displays the Arrival Date/Time and Departure Date/Time is left blank.

Departure Date
Enter or select from the calendar the date of the trip’s departure from the origin.

Departure Time
Enter the time of departure from the trip origin.

Return Date (Does not display for One-Way Trip)
Enter or select from the calendar the date of the trip’s return to the origin.

Return Time (Does not display for One-Way Trip)
Enter the time the trip returns to the origin of the trip.

Destinations
You have the option of requesting a trip with one destination or a trip with multiple destinations.

Select a trip destination from the Destination drop-down list. This is the place the trip is going to. These entries display based on the trip destination/locations you entered. See, *Setting Up Trip Locations* on page 141.

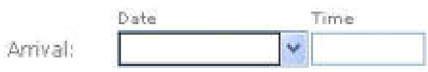
Allows you to add a location to the actual Trip Location file when you cannot find the destination you want in the Destination drop-down list. Click the “Click here to add a new location” link to display a panel that allows you add a new location.

Note: *You or your user group must have the “Trip Request: add Destination” permission to use this option. For information on adding a user group and setting permissions, see Adding a User Group and Assigning Privileges on page 265.*

Enter the new location and click 

and the new location is displayed in the panel and added to the list.

Note: *The new destination becomes an “Active” trip location.*



Enter the date/time the vehicle should arrive at the destination in these fields.

Enter the date/ time the vehicle should depart from the destination for another destination or the origin.

3. Clicking will add the new destination to the list of destinations and designate locations on the list as your trip destination.

Destination	Arrival Date/Time	Departure Date/Time	
Art Museum	10/12/2007 10:00:00 AM	10/12/2007 10:00:00 PM	Remove
Fenway Park	10/13/2007 10:00:00 AM	10/13/2007 2:00:00 PM	Remove

You can select a new destination, dates, and times and repeat as needed for each additional destination of the trip.

Number Of - Adults/Students/Wheelchairs/Vehicles

Enter the number of adults, students, wheelchairs, and vehicles associated with this trip. Trip estimates will be calculated according to the number of vehicles which gives the approver a better idea of what the costs might be for the trip requested.

Note: *The actual number of vehicles will still be determined at the scheduling stage where the initial number from the Trip Request may increase or decrease changing the final cost of the trip.*

Special Accommodations
Check this box if special accommodations will be needed for this trip, (i.e. any considerations for medical or safety needs such as wheelchair).

Contact Name/Phone
Enter the name and phone number of the contact person for the trip.

Notes
Enter any notes that might be applicable to the trip.

4. When you have finished the entries on the Detail Entries tab, click Submit to submit or Cancel to cancel the trip request.

   The system updates the trip record with the new data and displays a status of Requested. The system also sends an email confirmation message according to your message option settings.

5. During the trip request process, you can go back and edit the different stages by clicking on the appropriate tab and clicking Edit Request.

6. Click the Trip History tab if you want to view the history of the trip. See, *Viewing the History of a Trip Request* on page 235.

   Once a trip request has been submitted successfully, you can clone the trip request. You will notice that the link is now active. See, *Cloning a Trip Request* on page 239.

Sending Out a Trip Request for Approval

Once a trip request has been successfully submitted, it is ready to be sent out for approval.

To send out a trip request for approval:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Once you have located the Trip Request Click Approve. A comments box displays.
3. Enter any comments that you may have concerning this trip in the comments box. The approver(s) will be able to view your comments.
4. Click Approve Trip to send the trip request out for approval and begin the approval process.

Once a trip request has been successfully sent out for approval, it will begin to flow through the approval process. The levels of approval that your trip request may encounter depends on the account this trip request is using and the approval path associated with this account. See, *Setting Up Approval Paths* on page 168. The person(s) at the first level in the approval process will receive an email indicating that their approval is needed on a trip. The link in the email, will take the approver directly to the Trip Request - Trip Detail screen for that trip. The approver can then choose to Approve or Reject the trip (see, *Rejecting a Trip Request* on page 196). If they approve the trip, it then moves to the next approver in the approval path and the process is repeated.

Once the final Approver has approved the trip, it moves to a status of “Approved”. The Trip Request screen’s “Scheduling tab” becomes active and you can proceed to the scheduling stage. See, *Scheduling a Trip Disallowing for the Driver’s Time to/from a Garage* on page 199.

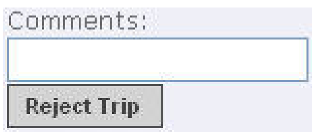
Rejecting a Trip Request

At any stage before a trip is scheduled, a Trip Request can be reviewed by an Approver and assigned a decision of "Rejected". The Trip Request is then sent back to the Requester (and the submitter if the submitter is different than the requester). The Requester can then make the necessary changes and resubmit the Trip Request. If the Requester does not resubmit the Trip Request, it will retain the status of "Rejected".

To reject a trip request:

Path:) **Trips > Request Trip**

1. Locate the trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Click Reject . A comment box and Reject button are displayed.



3. Enter the reason for the rejection in the comment box and then click Reject Trip .

   The system sends an email confirmation message to the Requester and submitter (if submitter is different from Requester).

   Upon receiving the rejection notice, the Requester can make any necessary changes and resubmit the request. See, *Resubmitting a Rejected Trip Request* on page 240.

   Note: *The Trip Request remains in the database and is available for reporting even if it is not resubmitted.*

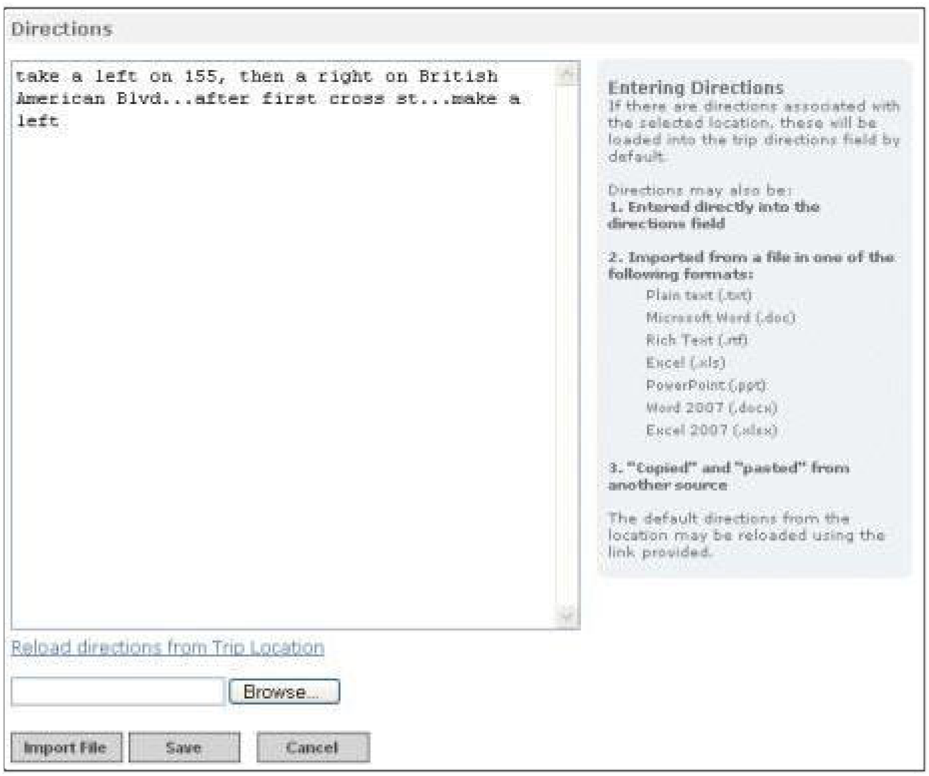
Adding Directions to a Trip Request (Optional)

You have the option of adding directions to a trip request which can be printed at the same time as the trip sheet. The trip directions are pulled from the directions entered in Trip Locations (see, *Adding a Trip Location* on page 141). If there are multi-destinations then the directions from the trip locations are concatenated. If directions aren't entered in Trip Locations, then you will need to enter the directions in the Text box or import directions that exist in one of the file formats shown below. You also have the option of using the Trip Directions Mapping Tool

To add directions to a trip request:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select the Directions tab to display the Directions screen.



If directions were entered in the Admin > System Lists > Trip Locations for the destinations selected in Trip Details, then those directions will display in the Directions text box. You can edit the directions as necessary.

3. If directions weren't entered in Trip Locations, type the trip directions in the text box provided.

4. Click Open Trip Directions/Mapping Tool to use the Trip Directions/Mapping Tool to get a distance estimate for the trip and to generate directions for the driver. This information can then be attached to the Directions. See, *Using the Trip Directions/Mapping Tool* on page 185.

   You can also copy and paste directions from another source or import the directions from a file in the following formats:

   - Plain Text (.txt)
   - Microsoft Word (.doc)
   - Rich Text (.rtf)
   - Excel (.xls)
   - PowerPoint (.ppt)
   - Word 2007 (.docx)
   - Excel 2007 (.xlsx)

5. Click Browse... and navigate to the txt file.
6. Click Import File and the directions in the txt file are imported into the Directions text box.
7. If you make a mistake, and want the original directions from Trip Locations, click Reload directions from Trip Location .

Scheduling Trips

Once the Trip Request is approved by the final approver in the approval path, the Scheduling tab becomes active and you can schedule a trip. You can schedule as many vehicles, drivers, monitors, and aides as necessary. If a driver turns down a trip, you can record a trip refusal for that driver. If a destination is drop and return, you can have the driver return to the origin after dropping students off at the destination, as well as having the option of assigning different drivers for each ‘leg’ of the trip.

The following topics are contained in this section:

Scheduling a Trip Disallowing for the Driver’s Time to/from a Garage

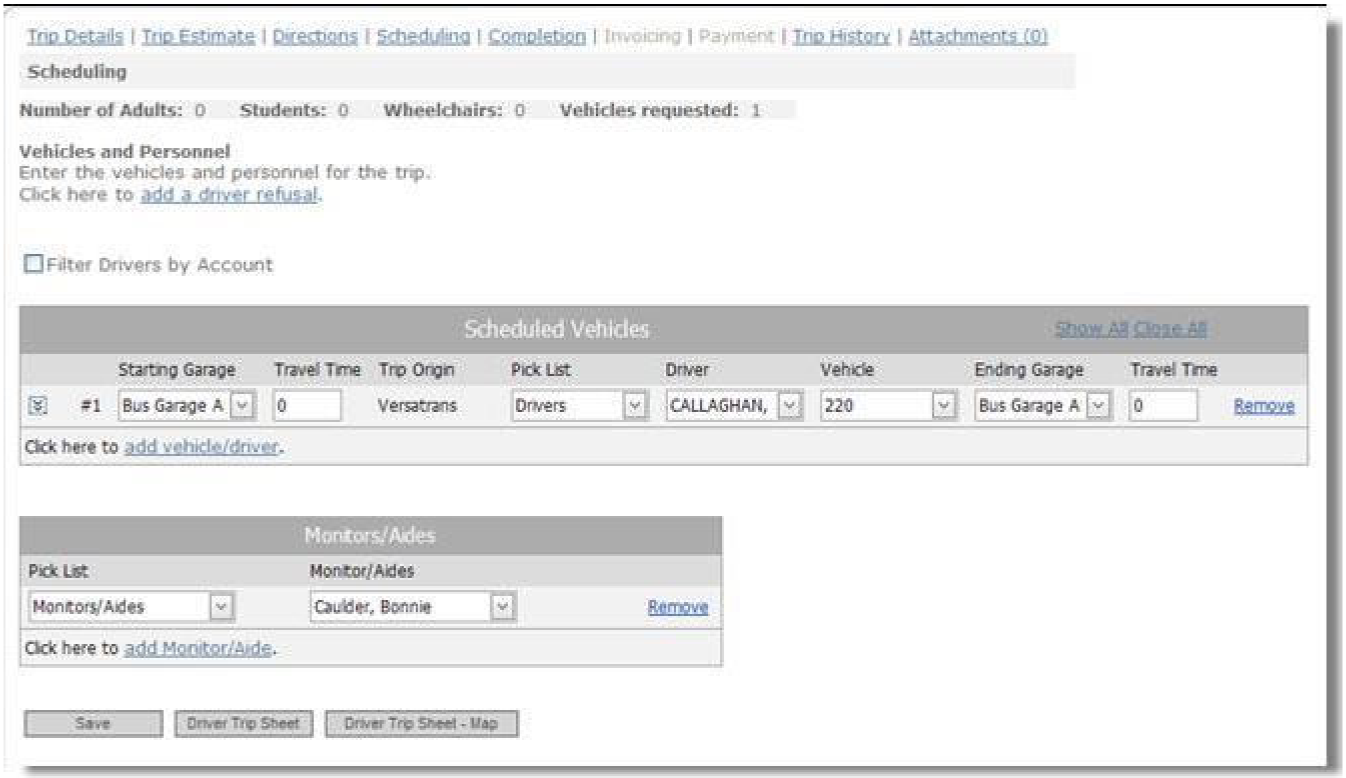
You have the option of scheduling a trip that either includes or does not include the time it takes a driver to go to or from the bus garage. The option that includes a driver’s time to/from the garage allows a scheduler to select a bus garage for a trip so they can add in the approximate time it takes for the bus to get from the garage to the trip origin. The scheduler would then be able to let the driver know when they need to leave the bus garage in order to arrive at the origin on time to pick-up the students for the field trip. See, *Scheduling a Trip Allowing for the Driver’s Time to/from a Garage* on page 201.

To Schedule a trip disallowing for the driver’s time to/from the garage:

Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.

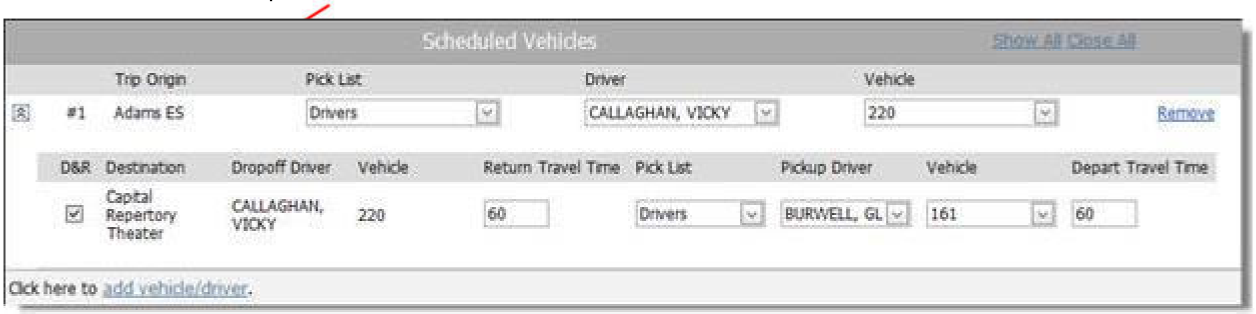
2. Select the Scheduling tab to display the Trip Request - Scheduling screen. If the trip is one-way, it will be indicated by the text **One-Way Trip** next to **Scheduling** and the **Drop and Return** checkbox will be disabled.



3. Add vehicles, drivers, monitors and/or aides as needed. See, *Adding Vehicles, Drivers, Monitors and/or Aides to a Trip* on page 205.

4. If a destination is a “Drop and Return” (trip where the driver drops students at the destination and returns to the origin), click or **Show All** to display both legs of the trip. You have the option of assigning different drivers and vehicles for each ‘leg’ of the trip.

Drop and Return



5. Enter a **Return Travel Time** in minutes. This is the amount of time allocated to the driver to return to the origin. (Adam ES).
6. Click the **Pick List** drop-down button and click on a Pick List to select it.
7. Click the **Pickup Driver** drop-down button and click on a driver's name to select it.
8. Click the **Pickup Vehicle** drop-down button and click on a vehicle's ID to select it.
9. Enter a **Depart Travel Time** in minutes. This is the amount of time allocated to the pickup driver to arrive at the destination.
10. Click Save to save your scheduling entries. If a driver or bus is unavailable or for whatever reason you need to make a change, you can return to the applicable section, make the changes and re-save the schedule. The system sends an email confirmation message according to your message option settings.

Scheduling a Trip Allowing for the Driver's Time to/from a Garage

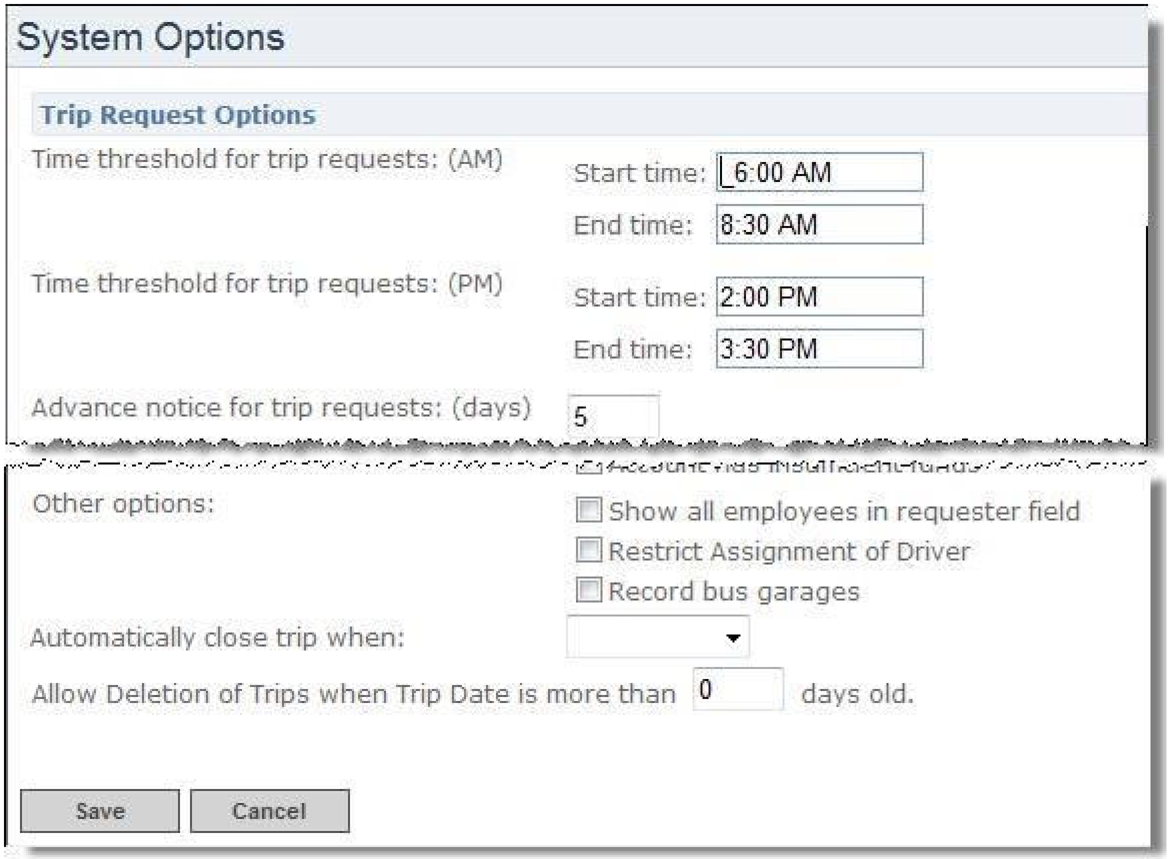
Once the Trip Request is approved by the final approver in the approval path, the Scheduling tab becomes active and you can schedule a trip. You can schedule as many vehicles, drivers, monitors, and aides as necessary. If a driver turns down a trip, you can record a trip refusal for that driver. If a destination is drop and return, you can have the driver return to the origin after dropping students off at the destination, as well as having the option of assigning different drivers for each 'leg' of the trip.

A user/scheduler can select a bus garage for a trip so they can add in the approximate time it takes for the bus to get from the garage to the trip origin. The scheduler would then be able to let the driver know when they need to leave the bus garage in order to arrive at the origin on time to pick-up the students for the field trip. If you do not want to allow for the driver's time to/from the garage, see, *Scheduling a Trip Disallowing for the Driver's Time to/from a Garage* on page 199.

To Schedule a trip allowing for the driver's time to/from the garage:

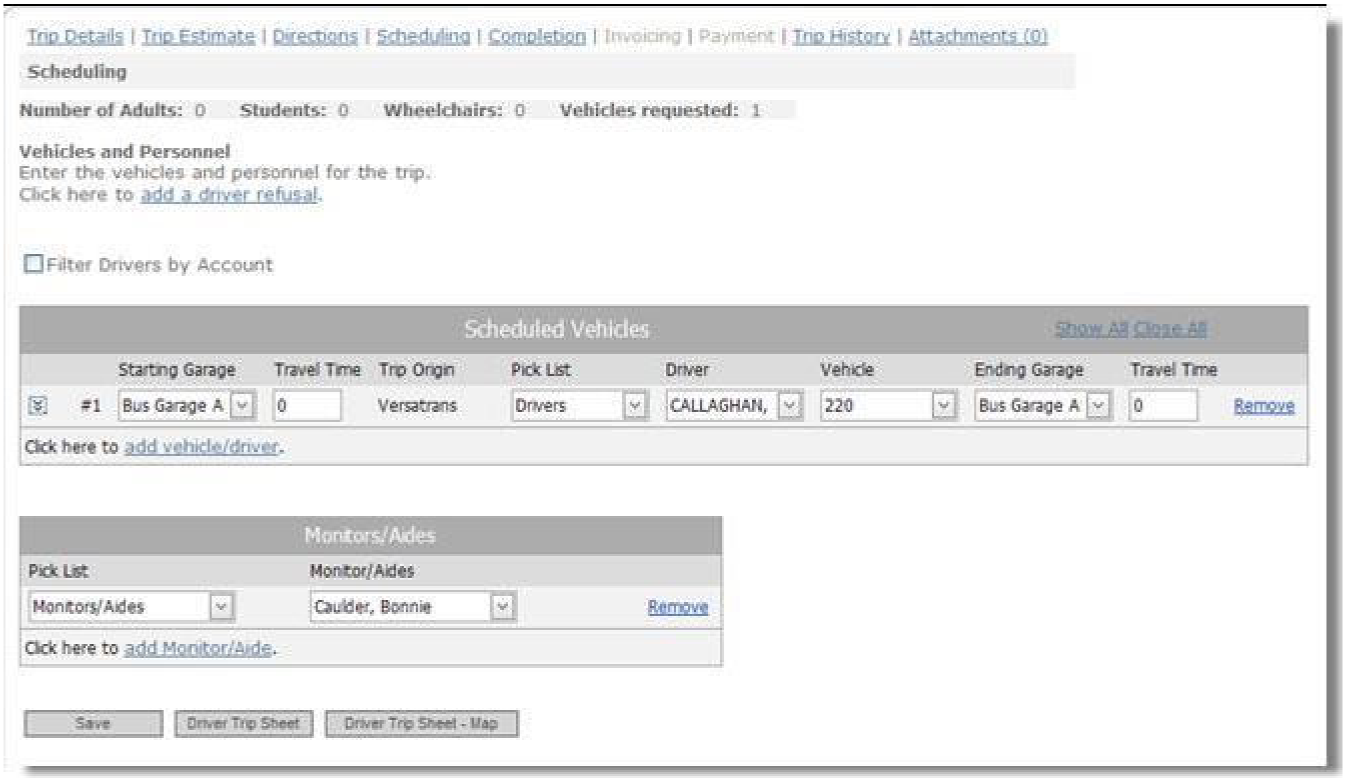
Path:) **Admin > System Options**

1. Follow the above path to display the System Options screen.



2. Check **Record bus garages** to turn on the garage time functionality.
3. Add the garages that you want to use for trip locations. See, *Adding a Trip Location* on page 141.
4. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.

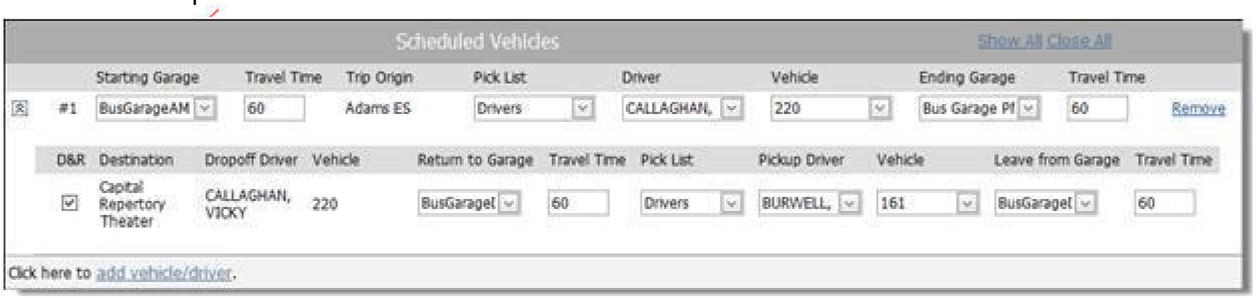
5. Select the Scheduling tab to display the Trip Request - Scheduling screen. If the trip is one-way, it will be indicated by the text **One-Way Trip** next to **Scheduling** and the **Drop and Return** checkbox will be disabled.



6. Add vehicles, drivers, monitors and/or aides as needed. See, *Adding Vehicles, Drivers, Monitors and/or Aides to a Trip* on page 205.

7. If a destination is a "Drop and Return" (trip where the driver drops students at the destination and returns to the origin), click or **Show All** to display both legs of the trip. You have the option of assigning different drivers and vehicles for each 'leg' of the trip.

Drop & Return



8. Select a Starting Garage location from the **Starting Garage** drop-down list. See, *Adding a Trip Location* on page 141.

9. Enter a **Travel Time** in minutes. This is the amount of time allocated to the driver to drive from the starting garage to the origin (Adam ES).

10. Select a Pick List from the **Pick List** drop-down List.

11. Select a driver from the **Driver** drop-down list.

12. Select a vehicle from the **Vehicle** drop-down list.

13. Select an **Ending Garage** from the Ending Garage drop-down list.

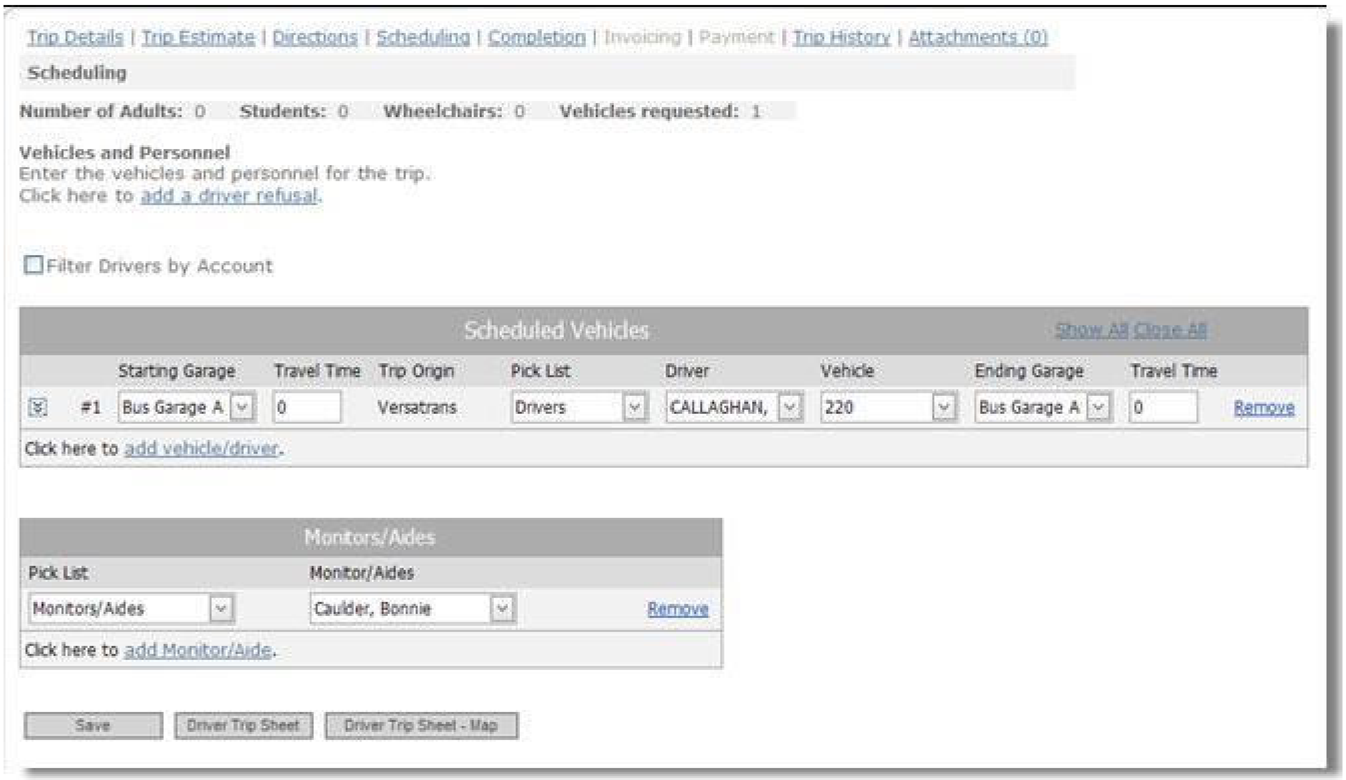
14. Enter a **Travel Time** in minutes. This is the amount of time allocated to the driver to drive from the origin (Adam ES) to the Ending Garage.

15. Click Save to save your scheduling entries. If a driver or bus is unavailable or for whatever reason you need to make a change, you can return to the applicable section, make the changes and re-save the schedule. The system sends an email confirmation message according to your message option settings.

Adding Vehicles, Drivers, Monitors and/or Aides to a Trip

Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select the Scheduling tab to display the Trip Request - Scheduling screen. If the trip is one-way, it will be indicated by the text **One-Way Trip** next to **Scheduling** and the **Drop and Return** checkbox will be disabled.



3. Check “Filter Drivers by Account” to have only those drivers on the Pick List that are associated with the account included in the list.

   Note: *If there are drivers associated with the account, the filter will be checked on by default. You will need to uncheck this option to view all the drivers in the Pick List.*

4. Click the **Pick List** drop-down button in the Scheduled Vehicles panel.

5. Click on a Pick List to select it. See, *Adding Drivers or Monitors/Aides to a Pick List via the Pick List Screen* on page 119.

   Note: *The Pick Lists will be in alphabetical order until a Pick List is selected and the record is updated. The Pick List used at the time of updating becomes the default Pick List.*

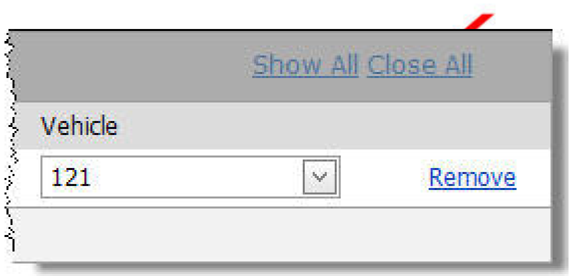
6. Click the **Driver** drop-down button .

7. Click on a drivers's name to select it. A list of drivers assigned to the Pick List displays.

   The following determines the Pick List driver order:

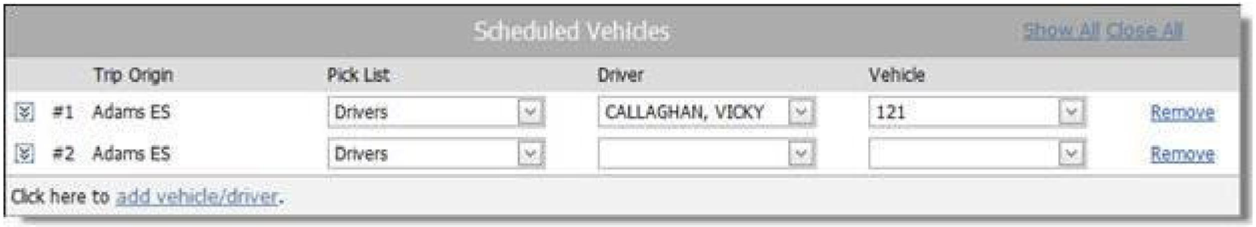
   - If the Pick List is not associated with a set of Driver Assignment Rules, the drivers will be displayed in alphabetical order by Employee Last Name, First Name.
   - If the Pick List is associated with a set of Driver Assignment Rules, the rules will be applied to the list of drivers.

8. Click the **Vehicles** drop-down button .



9. Click on a vehicle's ID to select it.

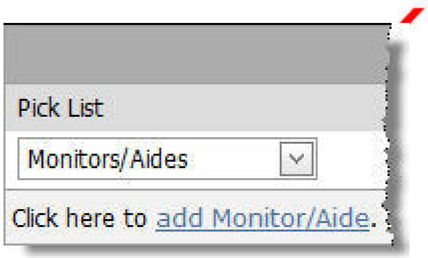
10. To add another driver and vehicle, click **add vehicle/driver**.



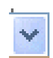
11. A second row displays where you can select the same Pick List or a different Pick List, and then select a Driver and Vehicle.

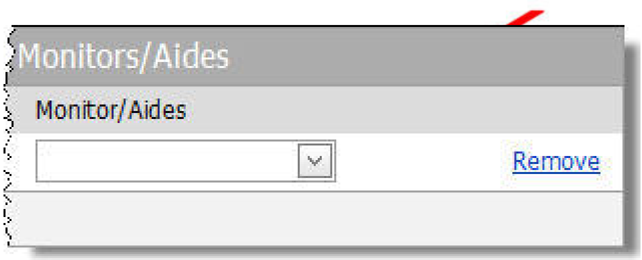
To add an aide and/or monitor to the trip:

12. Click the **Pick List** drop-down button  in the Monitors/Aides panel.



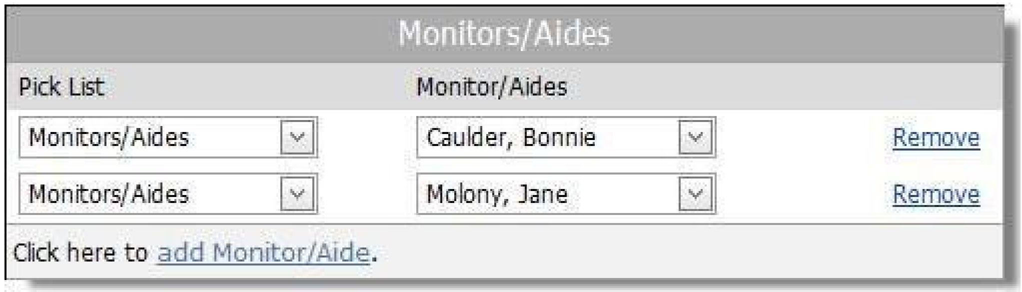
13. Click on a Pick List to select it.

14. Click the **Monitor/Aide** drop-down button .



15. Click on a monitor or aides name to select it.

16. To add another aide/monitor, click add **Monitor/Aide** and the Monitor/Aides panel is expanded allowing for the selection of additional monitors/aides.



17. You can continue to add as many aides/monitors as necessary by clicking **add Monitor/Aide**. You can then select the same Pick List or a different Pick List, and then select a monitor or aide.

18. Click 

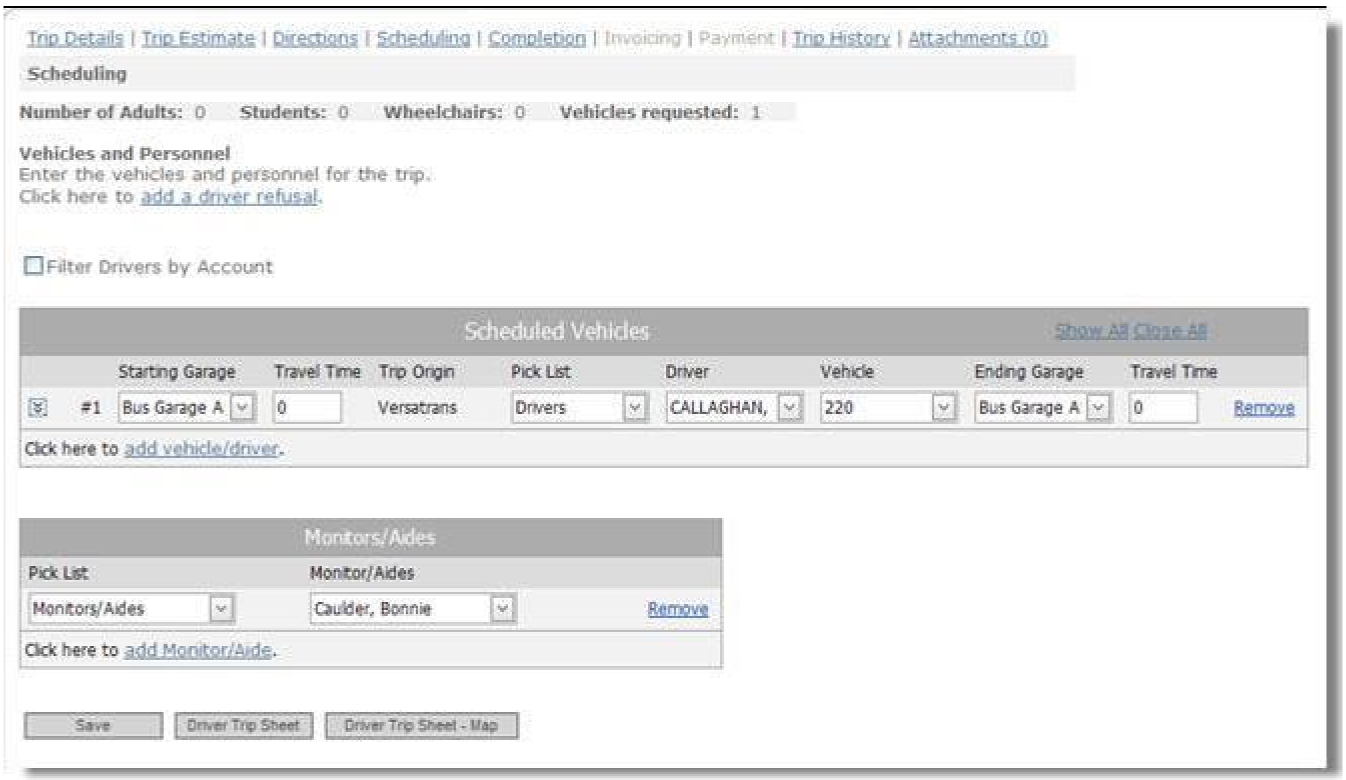
 to save your scheduling entries. If a driver or bus is unavailable or for whatever reason you need to make a change, you can return to the applicable section, make the changes and re-save the schedule. The system sends an email confirmation message according to your message option settings.

Adding a Driver Refusal

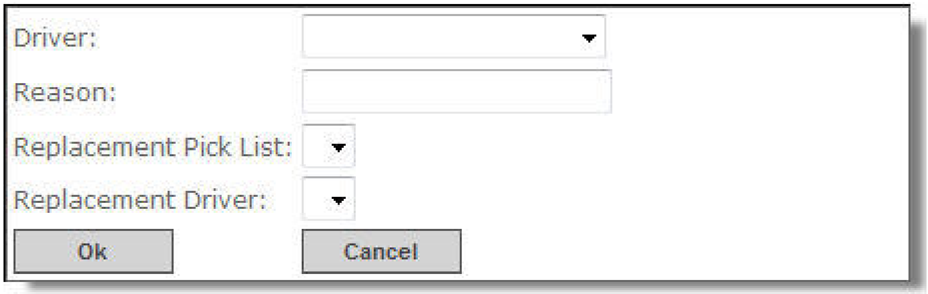
To add a driver refusal:

Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select the Scheduling tab to display the Trip Request - Scheduling screen. If the trip is one-way, it will be indicated by the text **One-Way Trip** next to **Scheduling** and the **Drop and Return** checkbox will be disabled.



3. Click **add a driver refusal**.



4. Click the **Driver** drop-down button and click on a driver's name to select it.
5. Enter the reason for the refusal in the **Reason** field.
6. Click the **Replacement Driver** drop-down button and click on a driver's name to select it.
7. Click Ok to save the refusal.

Modifying the Information of a Scheduled Trip

If you have Trip Edit permissions or are a SuperUser, you can modify a scheduled trip's information.

To modify the information of a scheduled trip:

Path:)   Trips > Search Trips

1. Locate a scheduled trip request (see, *Finding a Trip Request* on page 243).
2. Select the scheduled trip request that you want to modify and the Trip Request - Trip Detail screen is displayed.
3. Click **Edit Request** at the bottom of the screen.
4. You can modify any of the fields on the Trip Request - Trip Details screen. If you need assistance completing these fields, please review the field descriptions below.

   Trip Name
   Enter a unique name for this trip in this field. This is the name that will display on the Calendar when you complete the trip request.

   Trip Date
   Enter or select from the calendar the date that the trip is going to take place. All the date fields will auto populate with this date.

   Trip Type
   Select the type of trip from the Trip Type drop-down list. See, *Setting Up Trip Types* on page 148 to learn how trip types are set up.

Activity Type
Select the type of activity from the Activity Type drop-down list. This field describes the purpose of the trip. These entries display based on the trip activities you entered. See, *Setting Up Trip Activity Types* on page 152 to learn how activity types are set up.

Reason for Trip
Enter the reason that the trip is being taken.

Account
You select the account that will be used for this trip from the Account drop-down list. The balance remaining in the account will be displayed. See, *Setting Up Accounts* on page 156 and *Setting Up Driver Assignment Rules* on page 103.

Requester

Note: *The Requester field will be grayed out until there is an account determined.*

Once an account has been determined, select the name of the person requesting the trip from the Requester drop-down list. Names that appear in the Requester drop-down list are from the employee records. See, *Setting Up Driver Assignment Rules* on page 103.

Users who are Super-Users have the ability to override the requester name that displays in the Requester field. When the “Expand Requester List” option is left unchecked, the names of the requesters associated with the account will display. When this option is checked, the list of names displayed in the Requester list will be governed by the status of the System Option, “Show all Employees Requester field” as follows:

Note: *For more information on “Show all Employees in Requester field”, see “Setting the System Options” in the Triptracker User’s & Administrator’s Guide or consult the Online Help.*

- When “Show all Employees in Requester field” is **unchecked**, the expanded list of names will contain only active non-Transportation employees.
- When “Show all Employees Requester field” is **checked**, the expanded list of names will contain all active Transportation and non-Transportation employees.

Account Notes
Displays any notes entered on the account. This field is read only.

Origin
Select the origin of the trip from the Origin drop-down list. This is the place the trip starts. These entries display based on the trip origin locations you entered. See, *Setting Up Trip Locations* on page 141.

Departure Date
Enter or select from the calendar the date of the trip’s departure from the origin.

Departure Time
Enter the time of departure from the trip origin.

Return Date
Enter or select from the calendar the date of the trip's return to the origin.

Return Time
Enter the time the trip returns to the origin of the trip.

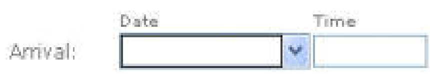
Destinations
You have the option of requesting a trip with one destination or a trip with multiple destinations.

Select a trip destination from the Destination drop-down list. This is the place the trip is going to. These entries display based on the trip destination/locations you entered. See, *Setting Up Trip Locations* on page 141.

Allows you to add a location to the actual Trip Location file when you cannot find the destination you want in the Destination drop-down list. Click the "Click here to add a new location" link to display a panel that allows you add a new location.

Enter the new location and click Add Location and the new location is displayed in the panel and added to the list.

Note: *The new destination becomes an "Active" trip location.*



Enter the date/time the vehicle should arrive at the destination in these fields.

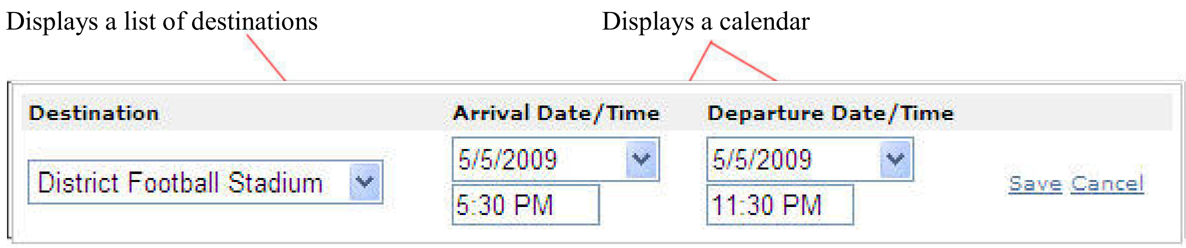
Enter the date/ time the vehicle should depart from the destination for another destination or the origin.

Clicking will add the new destination to the list of destinations and designate locations on the list as your trip destination.

Destination	Arrival Date/Time	Departure Date/Time		
District Football Stadium	5/5/2009 5:30:00 PM	5/5/2009 11:30:00 PM	Remove	Edit

You can select a new destination, dates, and times and repeat as needed for each additional destination of the trip. You can also edit the information at any time.

To edit the information, click **Edit** for the trip whose information you will be changing. Editable entry fields will display where you can enter or select new information.



Note: *If the change to the date(s) or time(s) causes a system violation and you do not have the permission to override the changes to the trip, it will not be saved.*

Clicking **Save** applies your changes.

Number Of - Adults/Students/Wheelchairs/Vehicles
Enter the number of adults, students, wheelchairs, and vehicles associated with this trip. Trip estimates will be calculated according to the number of vehicles which gives the approver a better idea of what the costs might be for the trip requested.

Note: *The actual number of vehicles will still be determined at the scheduling stage where the initial number from the Trip Request may increase or decrease changing the final cost of the trip.*

Special Accommodations
Check this box if special accommodations will be needed for this trip, (i.e. any considerations for medical or safety needs such as wheelchair).

Contact Name/Phone
Enter the name and phone number of the contact person for the trip.

Notes
Enter any notes that might be applicable to the trip.

5. When you are finished entering information, click **Save**. Clicking **Cancel** will return the grid to display mode without any changes.

Removing Drivers and Vehicles from a Scheduled Trip

If you have Trip Scheduling: Schedule permissions or are a SuperUser, you can remove scheduled drivers and vehicles from trips without having to cancel the previously scheduled trip and request a new one. The changes can be made on the Trip Request - Scheduling screen.

Drivers that are removed from a trip can be notified via email and will be placed back into the rotation based upon the Driver Assignment Rules in effect at the time. The vehicle is no longer counted against the maximum number of vehicles per day. If all the Driver/Vehicles are removed from a scheduled trip, the trip status is set to approved.

To remove drivers and vehicles from a scheduled trip:

Path:) Trips > Search Trips

1. Locate the scheduled trip containing the drivers and vehicles that you want to remove (see, *Finding a Trip Request* on page 243).
2. Select the Scheduling tab to display the Trip Request - Scheduling screen.
3. Select a driver.
4. Click **Remove**.

   The driver and associated vehicle are visually removed from the screen.

   Note: *The driver and vehicle are not actually removed from the trip until you click* ***Save****.*

5. You can continue this process until you have removed all of the desired drivers and vehicles.

   Note: *In order for trips to be in a Scheduled status, the trip must have a minimum of one vehicle and driver. If there are no vehicles and drivers or if the number of drivers does not equal the number of vehicles or if there are any drivers assigned to the trip without a vehicle assignment, the trip will be returned to Approved status.*

6. Click **Save** to remove the driver(s) and/or vehicle(s) from the trip.

   Drivers that are removed from a trip can be notified via email and will be placed back into the rotation based upon the Driver Assignment Rules in effect at the time. The vehicle is no longer counted against the maximum number of vehicles per day. If all the Driver/Vehicles are removed from a scheduled trip, the trip status is set to approved.

7. An e-mail can be sent to the drivers, monitors and aides associated with the trip that was removed.

RE: (Tripname)

Due to Scheduling needs, we have unscheduled you from the following trip, (Tripname) for (Tripdate).

Sincerely,

The Transportation Office

8. If desired, you can edit this email template (Trip Unscheduled Driver). See, *Displaying and Editing the Contents of an Email Message* on page 282.

Deleting a Single Canceled or Closed Trip

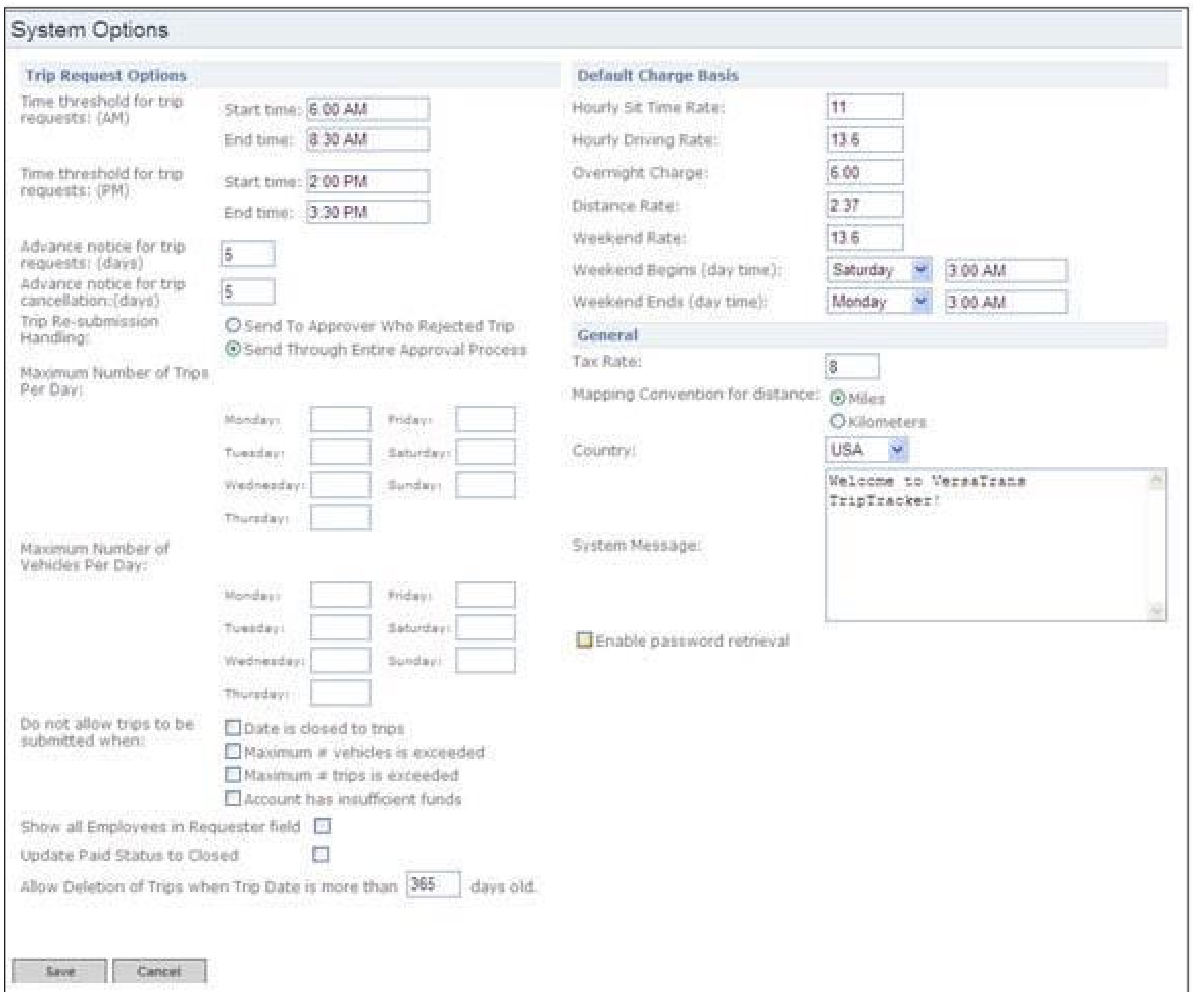
If you have Administrator: Trip Delete permissions or are a SuperUser, you can delete canceled or closed trips. The Trip Request: Trip Detail screen allows you to delete only the associated canceled or closed trip that meets the “Trip date is more than ____ days old” criteria entered in system options.

Before deleting a canceled or closed trip, you need to specify that only canceled or closed trips with a “Trip date is more than ____ days old” should be considered for deletion.

***Warning**): Once a trip is deleted, it cannot be restored and all data associated with that trip will be lost.*

1. Go to Admin > System Options to display the System Options screen.

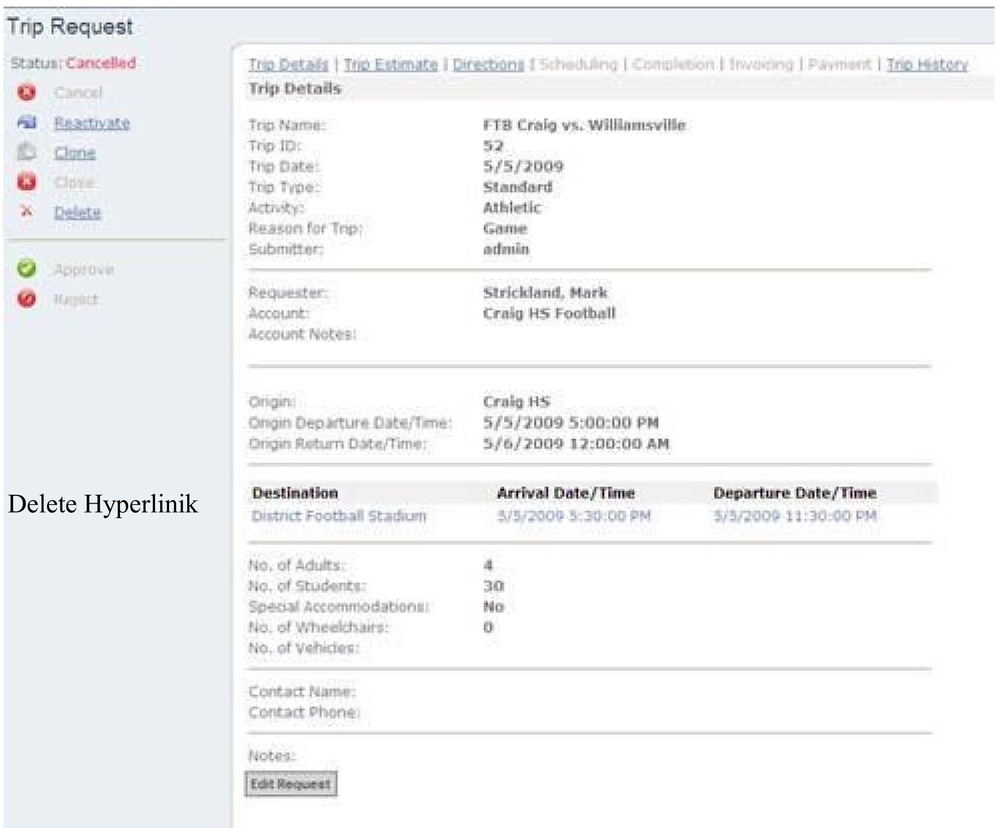
.



2. Enter a number of days. When a canceled or closed trip exceeds the number of days specified, it will be eligible for deletion. The default is 365 days.

> ***Note:*** *If a zero (0) is entered for the number of days then any canceled or closed trip will be eligible for deletion.*

3. Click **Save.**
4. Locate the canceled or closed trip that you want to delete (see, *Finding a Trip Request* on page 243). In the Trip Search screen, click on the trip you want to delete to display the Trip Request - Trip Details screen.



Warning*): It is strongly recommended that a backup of the data is made for historical purposes prior to deleting any trips. Once a trip is deleted, it cannot be restored and all data in regard to that trip will be lost.*

The delete hyperlink is active when the user and trip meets the following conditions:

- User must have Administrator: Trip Delete permissions or be a Super User.
- The trip has a status of canceled or closed.
- The trip meets the "Trip date is more than ____ days old" criteria as specified in System Options.

Click **Delete** and the following warning is displayed:

> **Warning:**
> You are about to delete selected trip(s). Deleting closed trips will affect account balances and driver assignments; canceled trips will not be impacted.

Before deleting a trip, you should consider the following:

- Account balances will not include any financial information from deleted closed trips.
- Drivers on deleted/closed trips will not be counted in the determination of Driver Assignment rotation.
- Canceled trips will not be impacted by the deletion because adjustments to Account Balances and Driver Assignments are addressed at the time the trip is canceled.

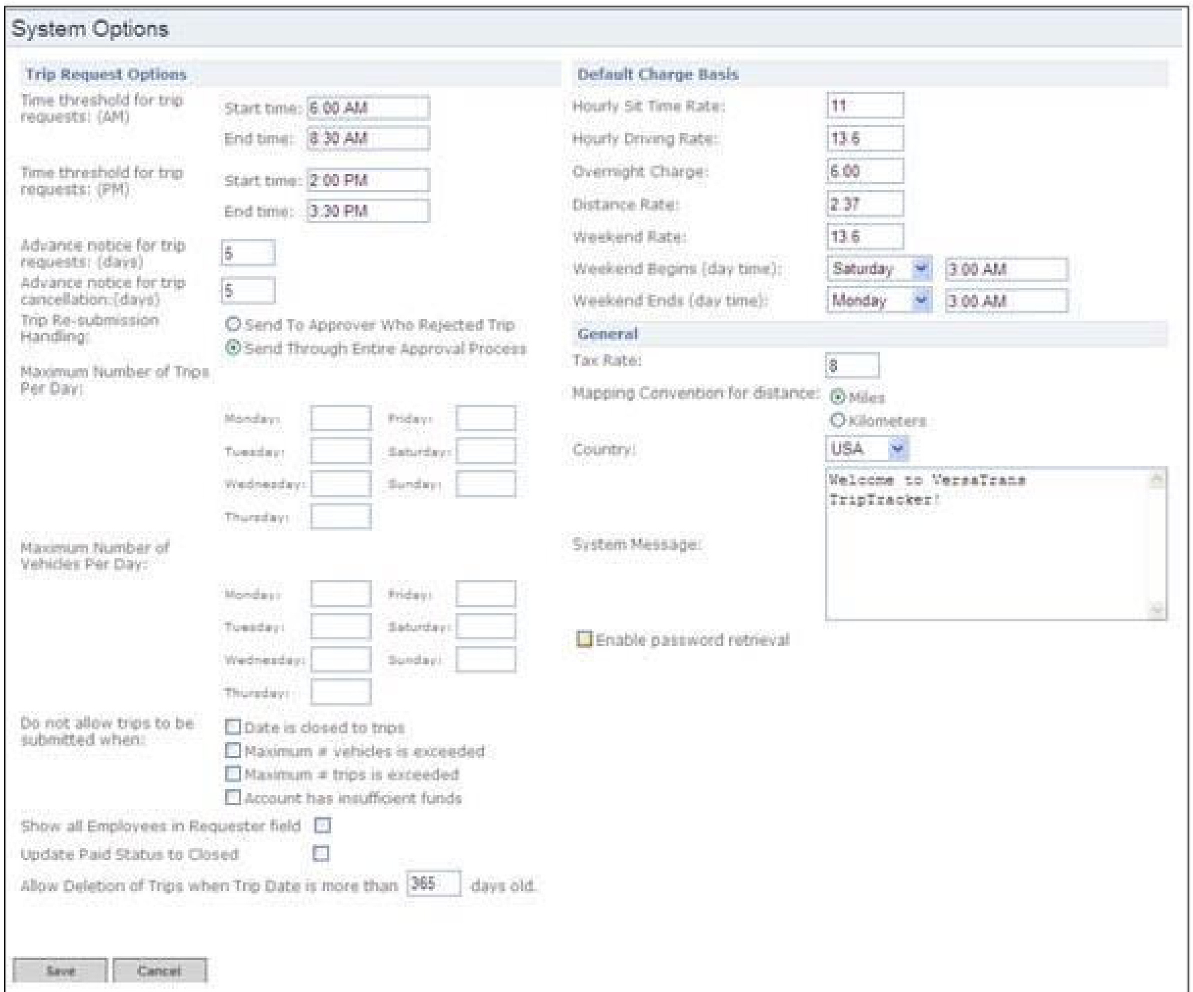
5. Click **OK** to delete the trip.

Deleting a Batch of Canceled or Closed Trips

If you have Administrator: Trip Delete permissions or are a SuperUser you can delete canceled or closed trips using Admin > Trip Delete which displays the Trip Delete screen. This screen lists all the canceled or closed trips that meet the “Trip date is more than ____ days old” criteria specified in System Options and allows you to select one or a batch of trips to delete. You can also perform a search in the Trip Delete screen to narrow your choices to canceled or closed trips that only meet specified criteria. Only trips with a canceled or closed status can be deleted.

***Warning**): Once a trip is deleted, it cannot be restored and all data associated with that trip will be lost.*

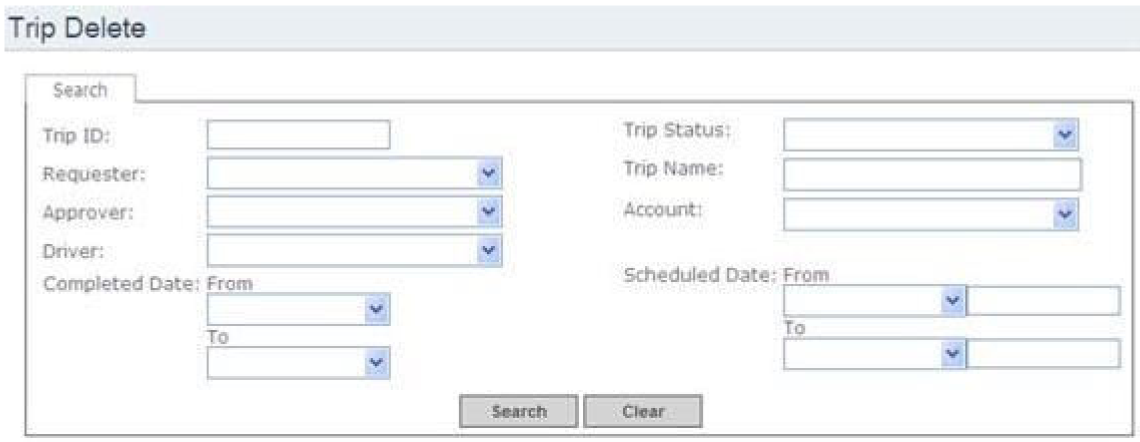
1. Go to Admin > System Options to display the System Options screen.



2. Enter a number of days. When a canceled or closed trip exceeds the number of days specified, it will be eligible for deletion. The default is 365 days.

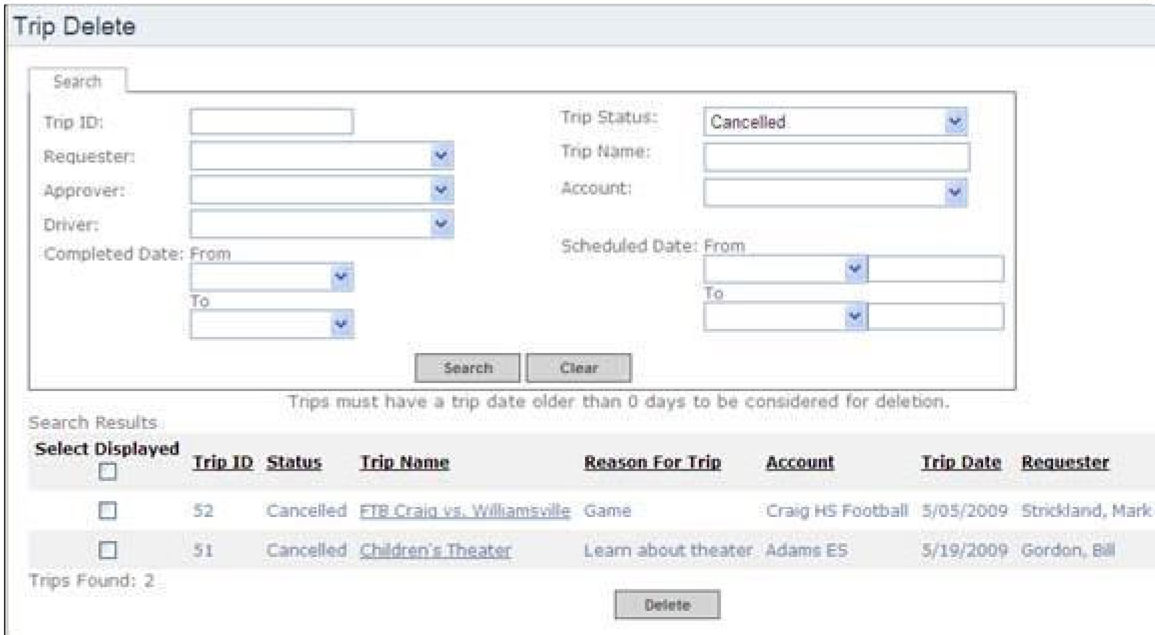
> ***Note:*** *If a zero (0) is entered for the number of days then any canceled or closed trip will be eligible for deletion.*

3. Click **Save.**
4. Go to Admin > Trip Delete to display the Trip Delete screen.



5. To search for trips, enter the information or select the trip information from drop-down lists. The only trip status available is canceled or closed. You can perform a search on a single criteria, such as requester, etc.
6. Clicking the **Search** button without entering information in the search fields will display all the canceled and closed trips that exceed the number of days specified in System Options.

7. Click Search.



Checking this box will select all of the trips displayed on this page

The system automatically fills in the number of days based on today's date minus the amount specified in System Options

8. You can click on the heading of any column in the search results to sort by that column and you can click on the **Trip Name** to display the "Trip Request" screen.

9. Select the trip(s) that you want to delete by checking them one at a time or check "**Select Displayed"** to mark all trips on the current page for deletion. You can only delete one page at a time.

Warning*): It is strongly recommended that a backup of the data is made for historical purposes prior to deleting any trips. Once a trip is deleted, it cannot be restored and all data associated with that trip will be lost.*

Click **Delete** and the following warning is displayed:

Warning:

You are about to delete selected trip(s). Deleting closed trips will affect account balances and driver assignments; canceled trips will not be impacted.

Before deleting a trip, you should consider the following:

- Account balances will not include any financial information from deleted closed trips.
- Drivers on deleted/closed trips will not be counted in the determination of Driver Assignment rotation.

- Canceled trips will not be impacted by the deletion because adjustments to Account Balances and Driver Assignments are addressed at the time the trip is canceled.

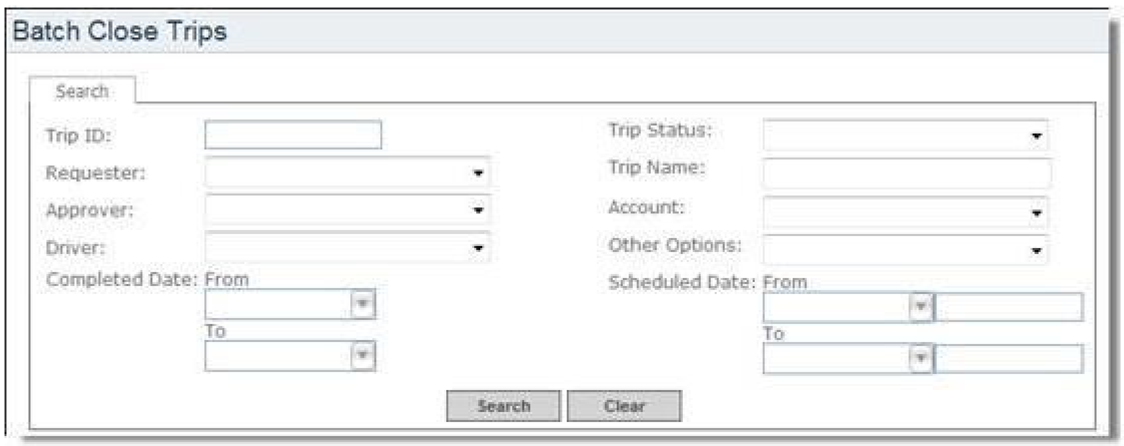
10. Click **OK** to delete the trips that you selected on the current page. If applicable, you can continue to the remaining pages and continue deleting trips.

Batch Closing Trips That are Completed, Awaiting Payment etc.

If you have the "Administrator: Batch Close Trips privilege", you can perform a search and batch close trips that have a status of Completed, Awaiting Payment, Partial Payment or Paid.

Path: Admin > Batch Close Trips

1. Follow the above path to display the Batch Closed Trips screen.



2. Click the Trip Status drop-down arrow to display the following filter options.

3. Select a trip status and enter any other filter criteria that you want to use.

4. Click **Search** and a list of trips matching the search criteria is displayed.

Search Results

Select Displayed ☐	Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date	Requester
☐	101	Awaiting Payment	invoicetest1		Adams ES	6/6/2011	Esquibel, Maria
☐	100	Awaiting Payment	NewCB1		Wilson ES	6/6/2011	Adams, Martin
☐	90	Awaiting Payment	32276C		Adams ES	5/30/2011	Esquibel, Maria
☐	88	Awaiting Payment	32276B		Adams ES	5/30/2011	Esquibel, Maria
☐	87	Awaiting Payment	32276A		Adams ES	5/30/2011	Esquibel, Maria
☐	85	Awaiting Payment	7clone1		Adams ES	4/15/2011	Esquibel, Maria
☐	73	Awaiting Payment	32091		Adams ES	4/15/2011	Esquibel, Maria
☐	64	Awaiting Payment	3vehicles		Adams ES	4/25/2011	Esquibel, Maria
☐	61	Awaiting Payment	DandR4		Adams ES	4/4/2011	Esquibel, Maria
☐	53	Awaiting Payment	Planetarium Trip	Learn about the stars	Adams ES	11/21/2010	Esquibel, Maria

Trips Found: 10

Close Trips

5. Select the trips that you want closed and click **Close Trips** to close the selected trips

Completing a Trip Using the Standard Completion Screen

There are two types of completion screens that you can use, the standard Completion screen and the simple Completion screen. The standard completion screen is the default option. The simple completion screen is made available by selecting the system option, “Use Simple Completion screen”.

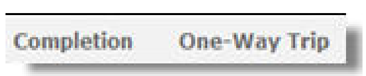
The standard Completion screen displays all interim dates/times, from the Scheduling screen as available for drop and return trips. It also displays Trip Details to and from the bus garage(s) if applicable.

The simple Completion screen allows users to manually enter Distance, Driving Time, Sit Time, Overnight Time, Weekend Time, as well as related expenses (i.e. Parking etc.). The manually entry of these items eliminates having to enter extra information that may or may not be relevant. For example, a user can just enter that the trip was 38 miles and took 2 hours to complete.

To complete a trip using the standard completion screen:

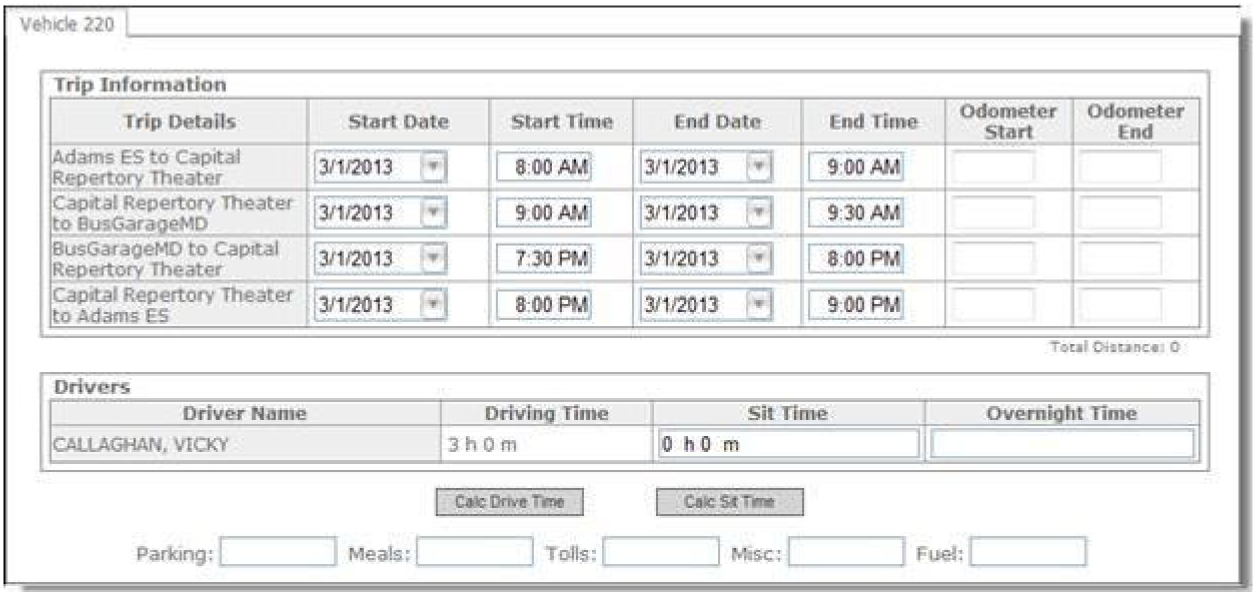
Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select the Completion tab to display the Trip Request - Completion screen. If the trip is one-way, it is indicated by the text One-Way Trip next to Completion.



There are many scenarios that a user can setup. For example, a single destination with one vehicle and one driver, a single destination with multiple vehicles and different drivers, a single destination drop and return with multiple vehicles and the same driver etc. The scenario we use for our example is a single destination with two vehicles and different drivers.

The completion screen displays all interim dates/times, from the Scheduling screen as available for drop and return trips. It also displays Trip Details to and from the bus garage(s) if applicable



There will be tabs for each vehicle and associated driver used for the trip. You must enter completion information for all vehicles and associated drivers.

Date/Time
Times are displayed in the applicable fields from the Trip Details and Trip Estimation information entered. You can enter missing information and make adjustments to reflect the actual date and times of the trip.

Odometer
Enter the actual odometer mileage. You only need to enter the first and last odometer readings.

Driver Name
The associated driver for this trip and vehicle.

Driving Time
This is a non-editable field. The current driving time is based on the trip information. If the trip information changes, you can click the **Calc Driving Time button** to recalcuate the driving time based on the new trip information.

Sit Time
Current sit time based on the trip information. This can be overriden if desired. If the trip information changes, you can click the **Calc Sit Time button** to recalcuate the sit time based on the new trip information.

Overnight Time
You can enter an overnight time.

Parking/Meals/Tolls/Misc/Fuel
Enter the actual allowances for parking, meals, etc.

3. Click **Save Completions Date** when you have finished making the final trip entries. Any changes to the trip information will be saved and the driving time and sit time will be recalculated and saved if applicable. If the trip information is valid, the information will be saved. Once the completion screen has determined that it has enough information to complete the trip, the trip will be completed and a confirmation message will display.

Completing a Trip Using the Simple Completion Screen

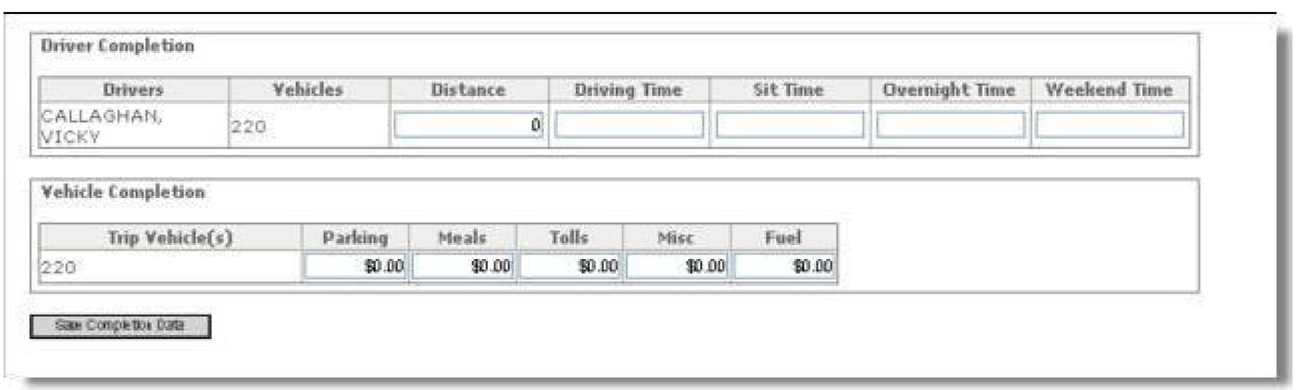
There are two types of completion screens that you can use, the standard Completion screen and the simple Completion screen. The standard completion screen is the default option. The simple completion screen is made available by selecting the system option, “Use Simple Completion screen”.

The standard Completion screen displays all interim dates/times, from the Scheduling screen as available for drop and return trips. It also displays Trip Details to and from the bus garage(s) if applicable.

The simple Completion screen allows you to manually enter Distance, Driving Time, Sit Time, Overnight Time, Weekend Time, as well as related expenses (i.e. Parking etc.). The manually entry of these items eliminates having to enter extra information that may or may not be relevant. For example, a user can just enter that the trip was 38 miles and took 2 hours to complete. For instructions on how to use the simple Completion page, see *Completing a Trip Using the Simple Completion Screen* on page 228.

To complete a trip using the simple completion screen:

1. Go to Admin > System Options to display the System Options screen.
2. Under **Other Options** select “Use Simple Completion screen” and click **Save**.
1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select the Completion tab to display the Trip Request - Completion screen.



3. Enter Distance, Driving Time, Sit Time, Overnight Time and/or Weekend Time.
4. Enter the actual allowances for Parking, Meals, etc.if applicable.
5. Click **Save Completions Date**. Once the completion screen has determined that it has enough information to complete the trip, the trip will be completed and a confirmation message will display.

Invoicing a Trip and Printing/Saving the Invoice

Once the trip is completed and the actual times, odometer readings, and allowances for each vehicle and driver are entered, you can create the invoice.

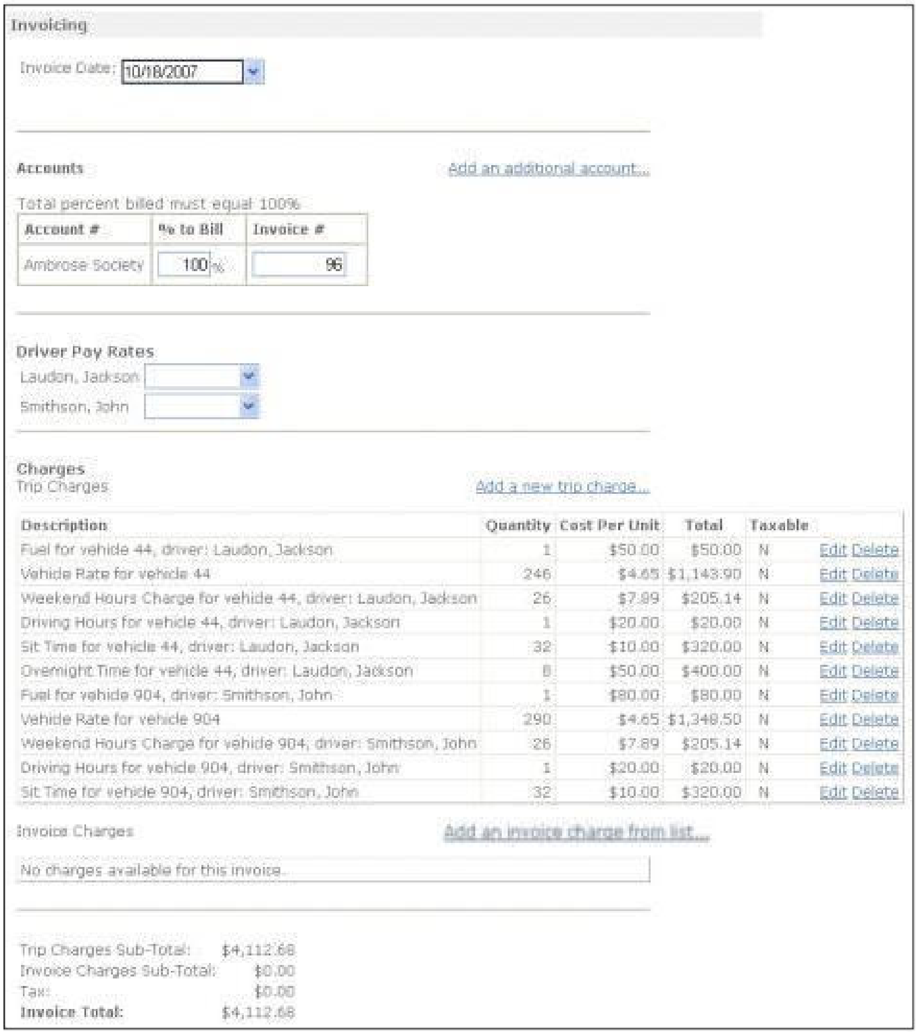
If a Job Category is selected for an employee, the associated rates are used. Otherwise, the Charge Basis associated with the Account that was defined on the Trip Request is used. If this is not the case, the rates from the System Options page are used.

To invoice a trip and print/save the invoice:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.

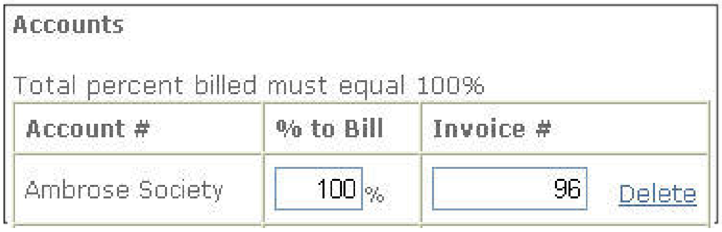
2. Select the Invoicing tab to display the Trip Request - Invoicing screen.



Invoice Date
Enter an invoice date or select a date from the calendar.

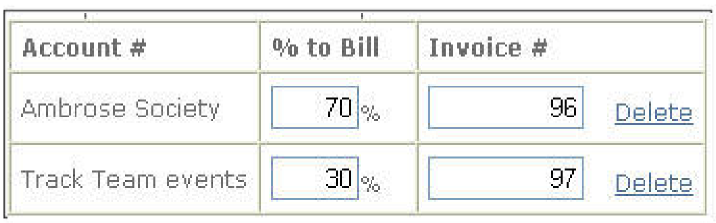
Accounts

The account specified in Trip Details is displayed along with a unique invoice #. The total percent billed must equal 100%.



3. If you want to add an additional account, click Add an additional account....

4. Click in the Account field, select an account and click Add.



In the case of multiple accounts, the total charge must be divided among the accounts by percentage and equal 100%.

Driver Pay Rates

The drivers associated with the trip request are displayed in the Driver Pay Rates panel. Pay rates are only used if the Charge Basis has "use driver's rates" selected.

5. Click in the Drivers Pay Rate Panel and select a pay rate for each driver (i.e. Driver 0r Non-

driving Drive).

Charges
Displays a description of the trip charges, the quantity, the cost per unit, the total and whether or not the trip is taxable. These items can be edited or deleted. Also, new trip and invoice charges can be added.

6. To add a new trip charge, click Add a new trip charge... .

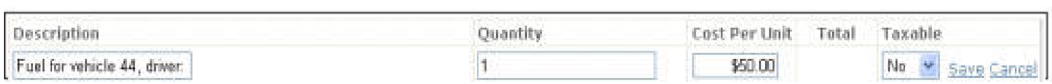
7. Enter/select the description, quantity, cost per unit, and whether or not the trip is taxable and click . The new trip charges are added.

8. To add a new invoice charge, click Add an invoice charge from list... .

9. Enter/select the new invoice charge and click Add . The new invoice charge is added.

Editing Trip Charges
The description of the trip charges, the quantity, the cost per unit, the total and whether or not the trip is taxable can be edited.

10. Click Edit for the trip charge that you want to work with.



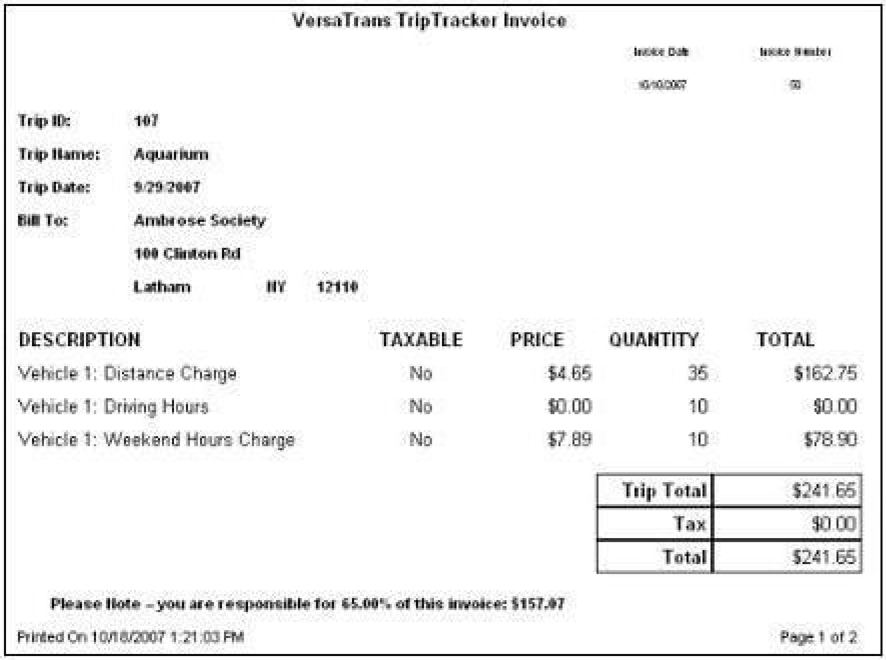
11. Type over the description and/or charges that you want to change. In the Taxable drop-down list, select Yes or No and click Save. The trip charge total will be automatically updated.

12. At any point, you can click Regenerate Invoice and the invoice will be recreated from the completion data.

13. When you are finished working with the invoice, click Save Invoice . The system sends an email confirmation message according to your message option settings.

Printing and the Invoice
The invoice can be previewed and then printed on your printer.

14. Click Printable Copy to display the print preview screen.



VersaTrans TripTracker Invoice

Invoice Date	Invoice Number
[illegible]	[illegible]

Trip ID: 107
Trip Name: Aquarium
Trip Date: 9/29/2007
Bill To: Ambrose Society
100 Clinton Rd
Latham NY 12110

DESCRIPTION	TAXABLE	PRICE	QUANTITY	TOTAL
Vehicle 1: Distance Charge	No	$4.65	35	$162.75
Vehicle 1: Driving Hours	No	$0.00	10	$0.00
Vehicle 1: Weekend Hours Charge	No	$7.89	10	$78.90

Trip Total	$241.65
Tax	$0.00
Total	$241.65

Please Note – you are responsible for 65.00% of this invoice: $157.07

Printed On 10/18/2007 1:21:03 PM Page 1 of 2

15. Click to send the invoice to your printer.

16. Click and save the invoice in PDF format.

Entering Payments for a Trip

After a trip is invoiced, you can enter the payments in Triptracker. We use a simple payment recording system that is not meant to take the place of your organization's accounting process but to track payments for reporting. Triptracker can handle full and partial payments.

To invoice a trip and print/export the invoice:

Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Select the Payment tab to display the Trip Request - Payments screen.

3. Complete the fields with the appropriate information.

4. Click **Record Payment** when you are finished entering payment information. The system displays the payment received and sends an email confirmation message according to your message option settings.

Payments Received

Date	Amount	Check Number	
10/18/2007	$2,736.17	334	Edit

Total Trip Amount:	$4,561.93
Total Payment Received:	$2,736.17
Balance:	$1,825.76

Breakdown by account:

Account	Total Amount	Amount Paid	Amount Due
Ambrose Society	$4,561.93	$2,736.17	$1,825.76

The Amount Due field indicates the balance owed on this account. If there is no amount due, $0.00 displays in this field.

Viewing the History of a Trip Request

The Trip History screen allows you to view the Date/Time, Status, Comment, User Name and Email information relating to a trip as it progressed through the different stages of the trip request process.

To view a history of the Trip Request:

Path: **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.

2. Select the Trip History tab to display the Trip Request - Trip History screen.

Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History

Trip History

Date/Time	Status	Comment	Username	Email Log
10/10/2007 11:31 AM	Requested	Trip Submission.	admin	4 Emails
10/11/2007 2:47 PM	Requested		admin	1 Email
10/11/2007 2:50 PM	Approved		admin	12 Emails
10/17/2007 1:52 PM	Scheduled	Trip Scheduled.	admin	2 Emails
10/17/2007 3:30 PM	Completed	Trip Completion.	admin	5 Emails
10/18/2007 11:02 AM	Completed	Trip Completion.	Lindaw (Woodard, Linda)	5 Emails
10/18/2007 12:33 PM	Awaiting Payment	Awaiting Payment.	admin	3 Emails
10/18/2007 1:50 PM	Partial Payment	Partial payment.	admin	3 Emails

The Email log lists the number of emails sent for each stage of the Trip Request.

3. To view email information for a specific stage, click the email link in that row. For example, click 2 Emails.

2 Emails

Date/Time	Address
10/17/2007 1:52 PM	ed.mcelroy@versatrans.com
10/17/2007 1:52 PM	kathy.ziarko@versatrans.com

A panel displays containing the Date/Time the email was sent and the address that the email was sent to.

4. To view the contents of the email, move the cursor over the envelope icon .

RE: Trimley Soccer Meet

We have scheduled the Trimley Soccer Meet you requested for 10/12/2007.

The trip has the following itinerary:

Location	Arrival Time	Departure Time
Shaker High School	N/A	10/12/2007 8:00 AM
Art Museum	10/12/2007 10:00 AM	10/12/2007 10:00 PM
Fenway Park	10/13/2007 10:00 AM	10/13/2007 2:00 PM
Shaker High School	10/13/2007 4:00 PM	N/A

Please ensure that all students and chaperones have filed the appropriate permission slip paperwork prior to the trip.

Please notify us of any changes in this schedule. To view the status of your trip, please click here.

Sincerely,

The Transportation Office

You can click this link to display the Trip Request - Trip Details screen.

Using Trip Express

Trips Express allows a user with Trip Express permissions to enter a Trip Request and approve it at the same time. Using Trip Express skips the “approval path process” and the trip request immediately becomes ready for scheduling. You must have Trip Request permissions to use this feature.

To use Trip Express:

Path:) **Trips > Request Trip**

1. Follow the above path to display the Trip Request - Trip Details screen.
2. Complete the Trip Details Screen, See *Submitting a Trip Request* on page 190.
3. When Trip Details are complete, click Express Trip. The system sends an email confirmation message according to your message option settings.
4. You have the option of completing a trip estimate, directions or go directly to Scheduling. For information on any of these tasks, see the following:
    - *Adding a Trip Estimate to a Trip Request* on page 181.
    - *Adding Directions to a Trip Request (Optional)* on page 197.
    - *Scheduling a Trip Disallowing for the Driver’s Time to/from a Garage* on page 199.

Cloning a Trip Request

Cloning allows you to select a trip in any stage of the trip request process, including closed, completed, cancelled, rejected or otherwise inactive trips, and submit a copy of the trip request through the trip request process. Any data that was entered in Trip Details, Trip Estimate or Directions will be retained and accessible for editing.

To clone a trip request:

Path:) Trips > Request Trip

1. Locate a trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Click  and the trip request is cloned and given a status of Requested. Any data that was entered in Trip Details, Trip Estimate or Directions is retained and accessible for editing.

   Note: *Triptracker does not save the driver and bus assignment information from trip to trip, so you must assign the bus and driver again.*

3. You can proceed through the remaining stages of the Trip Request process. See, *Requesting a Trip* on page 180.

Resubmitting a Rejected Trip Request

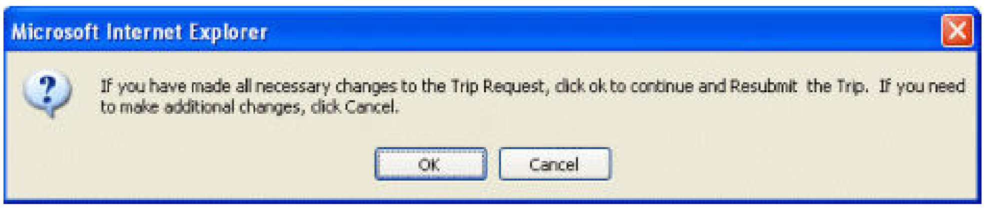
When a Requester wants to reinstate a rejected trip, they must edit the request data and then resubmit the request.

To resubmit a rejected a trip request:

Path:) **Trips > Request Trip**

1. Locate the trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Click 

. A confirmation dialog displays.



3. Click 

if you have made all necessary changes and the trip will be reactivated and returned to "Requested" status.

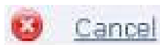
   The System will generate an email notification to the Approver that the trip has been resubmitted. When you have multiple Approvers, your system options settings determine who the resubmitted request will be sent to. The resubmitted request will either be sent to the Approver who rejected the trip or to all designated Approvers.

Canceling a Trip Request

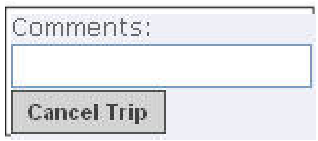
A trip Requester can cancel a trip at any stage before the trip is completed.

To cancel a trip request:

Path:) **Trips > Request Trip**

1. Locate the trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Click 

. A comment box and Reject button are displayed.



3. Enter the reason for the cancellation in the comment box and then click 

.

The system sends an email confirmation message to Requestor. All users in the request process who have dealt with the trip in some capacity will also receive email alerts.

Upon receiving the cancellation notice, the Requester can make any necessary changes and reactivate the request. See, *Reactivating a Cancelled Trip Request* on page 242.

Note: *A cancelled Trip Request remains in the database and is available for reporting even if it is not reactivated.*

Reactivating a Cancelled Trip Request

When a Requester wants to reactivate a cancelled trip, they can make any necessary changes and then reactivate the request.

To reactivate a cancelled trip request:

Path:) Trips > Request Trip

1. Locate the trip request (see, *Finding a Trip Request* on page 243) to display the Trip Request - Trip Details screen.
2. Click Reactivate . A confirmation dialog displays.
3. Click if you have made all necessary changes and the trip will be reactivated and returned to “Requested” status.

Finding a Trip Request

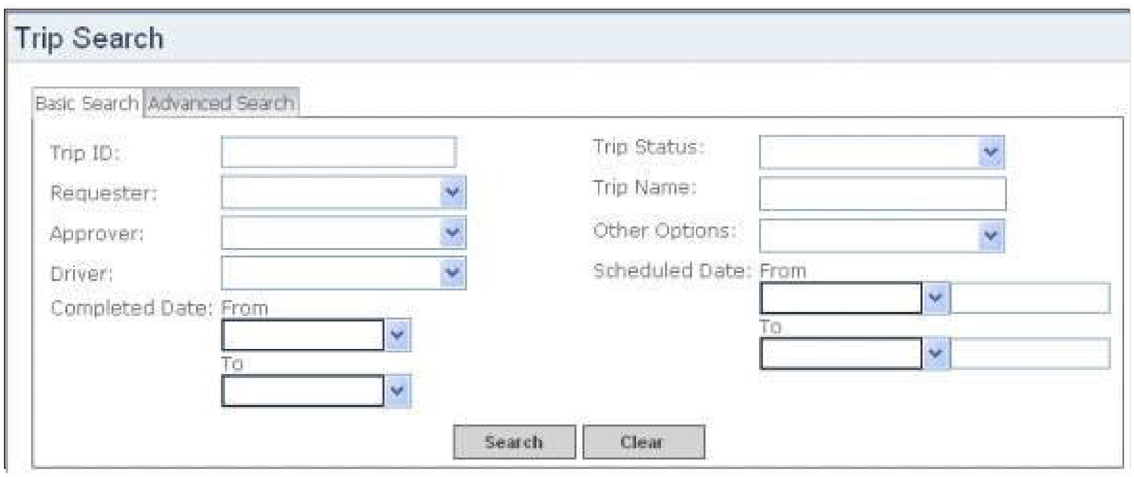
You can use the basic or advanced search methods to find a Trip Request in the Triptracker system. Whether you use the basic or advanced search largely depends upon what criteria you know and how you want the system to perform the search.

Finding a Trip Request Using the Basic Search

To find a Trip Request using the basic search:

Path:) **Trips > Search Trips**

1. Follow the above path to display the Trip Search screen.
2. Click the Basic Search tab.



3. Clicking the 

button without entering information will display all trip requests.
4. For a specific trip request, enter the information or select the trip request information from drop-down lists. You can perform a search on a single criteria, such as requester, etc.

5. Click Search to display the trip request search results.

Search Results — Print Search Results

Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date	Requester
1122	Requested	newmessage1		Adams ES	2/2/2015	Crannell, Rory
1116	Requested	rcrannelltrip1clone		Adams ES	1/30/2015	Crannell, Rory
1119	Requested	blocked time 3		Adams ES	1/26/2015	Crannell, Rory
1118	Requested	Blocked Time 2		Adams ES	1/15/2015	Crannell, Rory
1117	Requested	Block Time 1		Adams ES	1/15/2015	Crannell, Rory
1113	Requested	RCdemotrip2		Adams ES	1/7/2015	Esquibel, Maria
106	Requested	commentbox1		Adams ES	12/29/2014	Esquibel, Maria
111	Requested	Museum Tour		Adams ES	12/15/2014	Gordon, Bill
110	Requested	ed trip		Adams ES	12/11/2014	Esquibel, Maria
97	Requested	test2new3clone		Craig HS English	10/31/2014	Crannell, Rory

1 2 3 Next

You can click on the heading of any column in the search results to sort by that column.

6. Click on the Trip Name to display the Trip Request screen.

Finding a Trip Request Using the Advanced Search

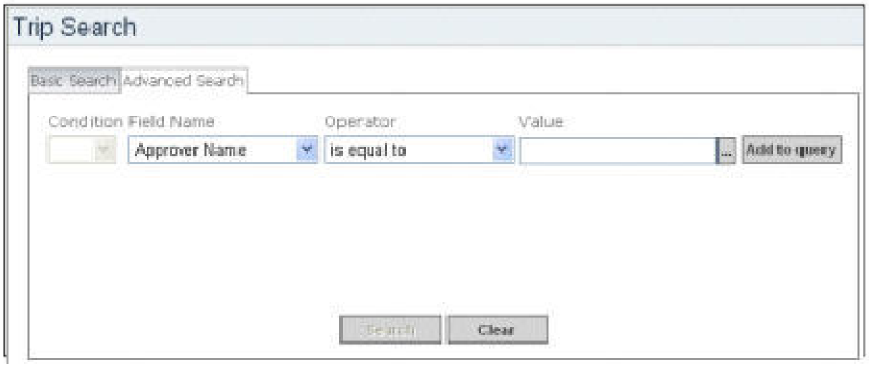
If you want to enter more specific criteria, use the advanced search. The advanced search gives you more options in choosing criteria by introducing an operator, such as is equal, not equal, less than, and is between.

To find a trip request using the advanced search:

Path:) Trips > Search Trips

1. Follow the above path to display the Trip Search screen.

2. Click the **Advanced** search tab.



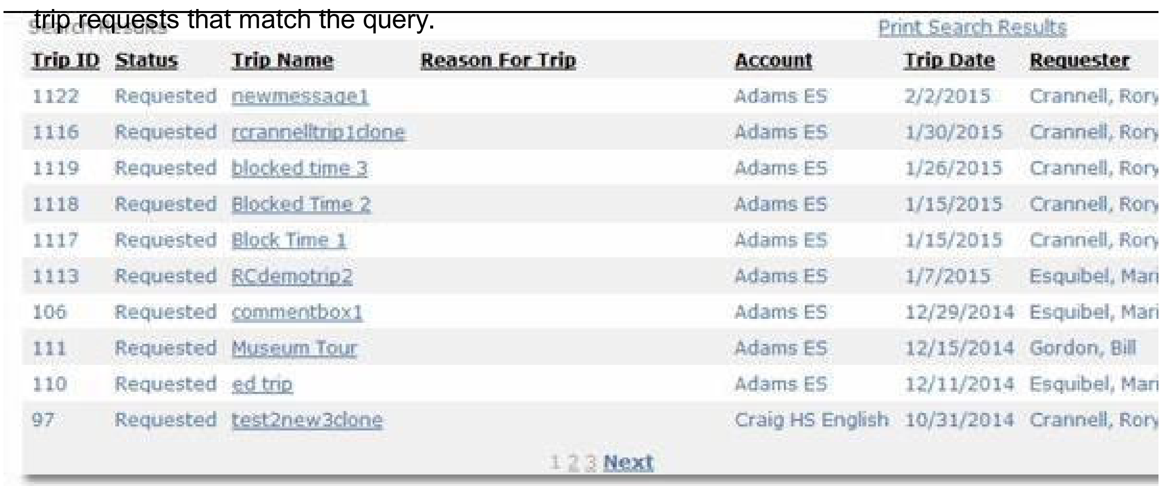
3. Select the field you want to search on from the **Field Name** drop-down list. Field names include: **Approver Name, Driver Name, Requester name, Scheduled Date, Trip Name, Trip Status,** and **trip ID**.

4. Select an operator for this criterion from the Operator drop-down list. Operators include: **is equal, Is not equal, Is less than, Is less than or equal To, Is greater than, Is greater than or equal To, is between, is in, is not in, does not contain data,** and **contains data.**

5. Depending on the Field Name selected, click [...] or [v] to display a list of values or enter a value in the Value field. If you select a value, click **OK**.

6. Click [Add to query]. The Condition field becomes active allowing you to select a condition (AND or OR) and if desired, continue entering criteria to the query.

7. When you are finished entering criteria, click [Search]. The Search Results panel displays the trip requests that match the query.



Search Results

Print Search Results

Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date	Requester
1122	Requested	newmessage1		Adams ES	2/2/2015	Crannell, Rory
1116	Requested	rcrannelltrip1clone		Adams ES	1/30/2015	Crannell, Rory
1119	Requested	blocked time 3		Adams ES	1/26/2015	Crannell, Rory
1118	Requested	Blocked Time 2		Adams ES	1/15/2015	Crannell, Rory
1117	Requested	Block Time 1		Adams ES	1/15/2015	Crannell, Rory
1113	Requested	RCdemotrip2		Adams ES	1/7/2015	Esquibel, Mari
106	Requested	commentbox1		Adams ES	12/29/2014	Esquibel, Mari
111	Requested	Museum Tour		Adams ES	12/15/2014	Gordon, Bill
110	Requested	ed trip		Adams ES	12/11/2014	Esquibel, Mari
97	Requested	test2new3clone		Craig HS English	10/31/2014	Crannell, Rory

1 2 3 Next

Attaching Files to a Trip Request

If you have the appropriate "Trip Attachments" permissions or are a Super User, you can attach files (i.e. student roster, special instructions, etc.) to a Trip Request, view attached files and/or delete attached files.

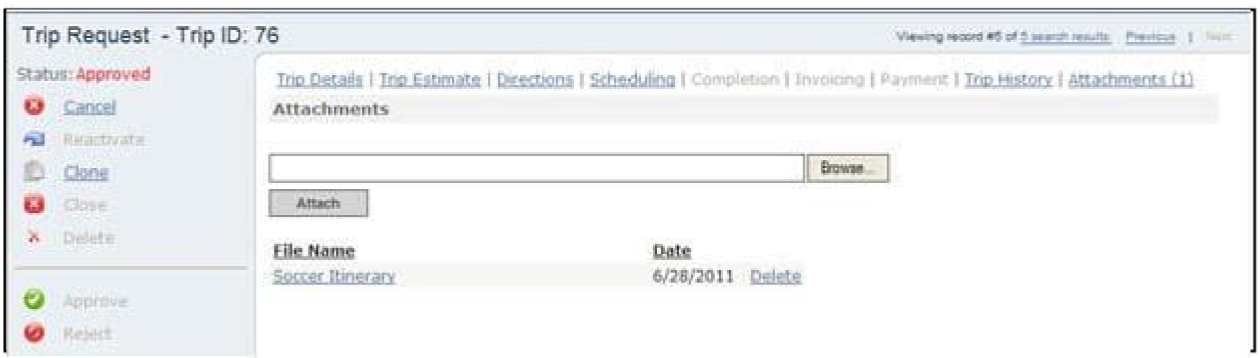
To attach files to a trip request:

Path: Trips > Search Trips

1. Locate the trip request by either using the basic search or advanced search. See, *Finding a Trip Request Using the Basic Search* on page 243*Finding a Trip Request Using the Advanced Search* on page 244.

   Note: *You can use the advanced filter to locate Trip Requests containing attached files by selecting the field name "Attachments" and using the operator "Contains Data".*

2. Click the **Attachments** link to display the Trip Request Attachment screen.



3. Click the **Browse** button and navigate to the location of the file and select the file that you want to attach. Versatrans Triptracker supports, (.bmp, .csv, .doc, .docx, .docm, .dot, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .ppt, .pptx, .rtf, .tif, .tiff, .txt, .xls and .xlsx,).

4. Click **Attach** and the file is attached to the Trip Request. The files name and date it was created is displayed under Attachments.

   Note: *If you clone a trip, the attached files will not be copied over.*

5. Click **File Name** to sort alphabetically. Click **Date** to sort from most recent to oldest.

Viewing Files Attached to a Trip Request

If you have the appropriate "Trip Attachments" permissions or are a Super User, you can view files attached to a trip.

To view files attached to a trip request:

1. Locate the trip request by either using the basic search or advanced search. See, *Finding a Trip Request Using the Basic Search* on page 243*Finding a Trip Request Using the Advanced Search* on page 244.

   Note: *You can use the advanced filter to locate Trip Requests containing attached files by selecting the field name "Attachments" and using the operator "Contains Data".*

2. Click the **Attachments** link to display the Trip Request Attachment screen.

3. Under Attachments, click on the file that you want to view. The file will display in the application that the file was created in.

   Note: *If the application that was used to create the file is not located on your workstation, then you will be prompted to choose which application to use.*

Deleting Files Attached to a Trip Request

If you have the appropriate "Trip Attachments" permissions or are a Super User, you can delete files attached to a trip.

To delete files attached to a trip request:

1. Locate the trip request by either using the basic search or advanced search. See, *Finding a Trip Request Using the Basic Search* on page 243*Finding a Trip Request Using the Advanced Search* on page 244.

   Note: *You can use the advanced filter to locate Trip Requests containing attached files by selecting the field name "Attachments" and using the operator "Contains Data".*

2. Click the **Attachments** link to display the Trip Request Attachment screen.

3. Under Attachments, click **Delete** next to the file that you want to delete and click **OK**.

Chapter 4

Working with Reports in Triptracker

Topics In This Chapter:

Triptracker Reports Overview

The Triptracker Reports provide a way of managing the most important information in the system. Using the Triptracker report tools, you can generate, preview, print, or export a report in a number of formats including Excel or Acrobat (PDF) file.

If you need to edit reports or create new reports, you need to have Report Writer which is a standalone report editor installed on your computer. Report Writer allows you to create new reports, create sub-reports, create custom reports using SQL statements and edit reports. There is also a report wizard that takes you step-by-step through creating new reports and editing existing reports. These reports can be printed and saved in multiple formats.

The Report Writer installation files can be downloaded from the Tyler Versatrans Knowledgebase. For information on how to install Report Writer, see the Tyler's Versatrans Report Writer Installation Guide.

Note: *Report Writer is a standalone report editor and cannot be launched from within Triptracker. However, any reports created or edited in Report Writer can be accessed in Triptracker.*

Types of Reports

The following report types containing default reports are available in Triptracker: Default reports are pre-defined reports that we have created for you.

Listing Reports
Provides simple listings of accounts, buildings, trip locations, and vehicles in the Triptracker system.

Accounting Reports
Provide financial information regarding trips that have been billed. They assist in the monitoring of trips charges and payment.

Trip Reports
Gives you several ways to keep track of the trip activity and trip details.

Employee Reports
Gives you information about employees, employee certifications, driver refusals and driver time.

The following types of reports are also available in VersasTrans Triptracker:

User Defined Reports
User defined reports are reports that have been created by the user through Report Editor. These reports display as a sub-menu of the edited default report or custom report.

Custom Reports
Custom reports are reports created by the user using SQL statements as opposed to one of our pre-defined default reports.

Listing Reports

The Listing Reports give you simple lists of basic information you have entered into Triptracker:

- *Accounts*: This report shows the details of each account you have entered into the system including contact information and budget information.
- *Buildings*: This report provides details on all Buildings defined in the Triptracker system.
- *Trip Locations*: This report details the trip locations (origins and destinations) defined in the Triptracker system.
- *Vehicles*: This report gives you a list of all vehicles in the Vehicle file.
- *User*: This report includes import status, warnings and errors,

Accounting Reports

The Accounting Reports give you information based on the account information you have entered into Triptracker and the trips that have been billed under the accounts.

- *Trip Account Balance:* This report provides account balance information for each account per trip for each fiscal period.
- *Balance Due (Aging)*: This report presents account information aged in categories based on a trip's invoice date. The report includes trips that have been billed, but have not yet been paid in full.
- *Cost Detail*: This report produces a listing of trips and all charges associated with the trip.
- *Invoice*: This report displays invoice information grouped by trip ID.
- *User Accounts:* This report includes import status, warnings and errors,

Trip Reports

The Trip Reports give you information based on the trip information you have entered into Triptracker:

- *Cancelled Trips*: This report will provide details regarding any trip in a Cancelled status.
- *Driver Trip Sheets*: These reports produce a listing of trip sheets for selected trips that can be used for recording pertinent information during the course of a trip.
- *Driver Trip Sheets with Map*: These reports produces a listing of trip sheets for selected trips that can be used for recording pertinent information during the course of a trip. They also include Google point-to-point directions and map if attached to the trip.
- *Trip Import log*: This report allows users to view a report of all trips from the import file, errors encountered and whether the trips were imported.
- *Trip Listing by Account (with page break)*: This report is a listing of trips summarized by account with a page break by account.
- *Trip Listing Detail*: This report shows the details of each trip. The report can be sorted and filtered by different trip details to present the list of trips you are looking for.
- *Trip Status History*: This report provides a history of a trip as it passes through the significant trip processing stages (Requested, Approved, Rejected, Scheduled, Completed, Billed, Paid, Completed).
- *Trips Per Account*: This report is a listing of trips grouped account and trip name.

Employee Reports

The Employee Reports focus on employee record information you have entered into Triptracker:

- *Certification Listin*g: This report lists the details of each employee's certification information and the status of those certifications.
- *Employee Listing*: This report shows the employees you have entered into the system.

- *Refused Trip Details*: This report lists information associated with a driver's trip refusal.
- *Summary of Driver Time*: This report shows the trips taken by a driver, the amount of hours by trip and the total number of hours.
- *Pick List Rotation*: This report lists the appropriate current "order" of each Pick List based on its Driver Assignment Rules. Both active and inactive members of Pick Lists will appear on this report.

Note: *When selecting Driver Assignment Rules, if "Apply Rotation" is used in conjunction with "Ignore all rules and settings", then when the scheduler next pulls that list for scheduling, the list may not be in alphabetical order. For example, John Smith may have taken a trip, so instead of the order being John Smith, Jane Doe, Bill White, it could be ordered Jane Doe, Bill White, John Smith.*

- *Pick List Members*: This report is generated from the search criteria entered in the Employee Associations tab on the Pick Lists screen when assigning employees to a Pick List.
- *Employee - Associated Pick List*: This report lists the Pick Lists that the employee is a member of.
- *Employee*: This report includes import status, warnings and errors,
- *Employee Pay Rate*: This report includes import status, warnings and errors,

Report Security

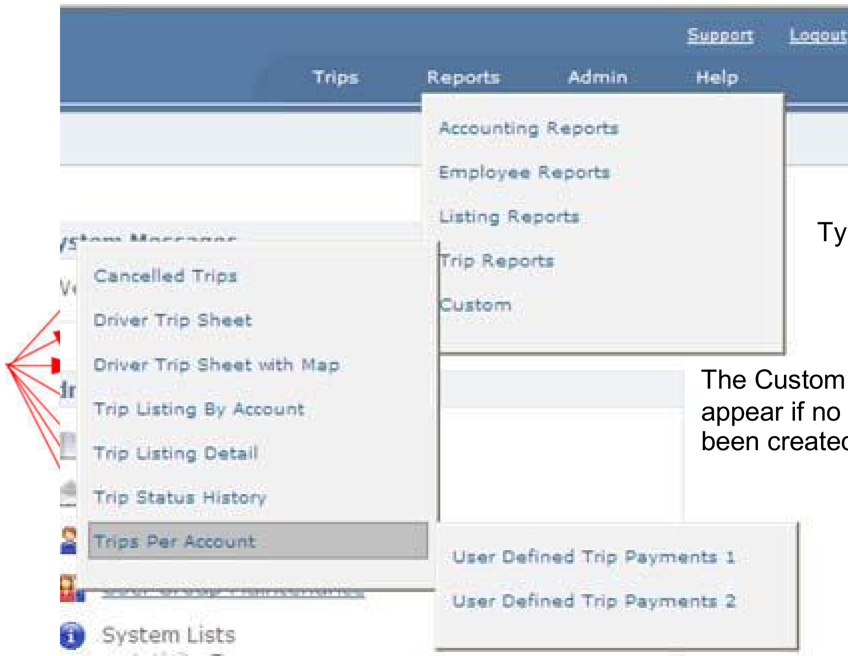
Users with the ability to run reports in Triptracker are limited to viewing results that pertain only to the accounts they have access to. For example, a super user will see information for all accounts in a report but User 1 will only see information for accounts A and B if they only have access to accounts A and B.

Understanding the Report Menus

The "Reports" menu lists the following reports:

- Default Reports
  - Consists of Accounting, Employee, Listing and Trip Reports.
- User Defined Reports
  - Created as edited copies of the default reports or created via the pre-defined views supplied with Report Writer usage.

- Custom Reports
  - If created, these are custom SQL reports designed through the Report Writer. If no SQL reports have been created, this menu option will not appear.



Default reports

Types of reports

The Custom menu option will not appear if no SQL reports have been created

User defined reports

For information on how to create reports and searches using the Report Writer, see the Tyler's Versatrans Report Writer User's Guide or online help.

Generating Reports in Triptracker

Since the report generating process is the same for all reports, we use the Invoice Report as an example.

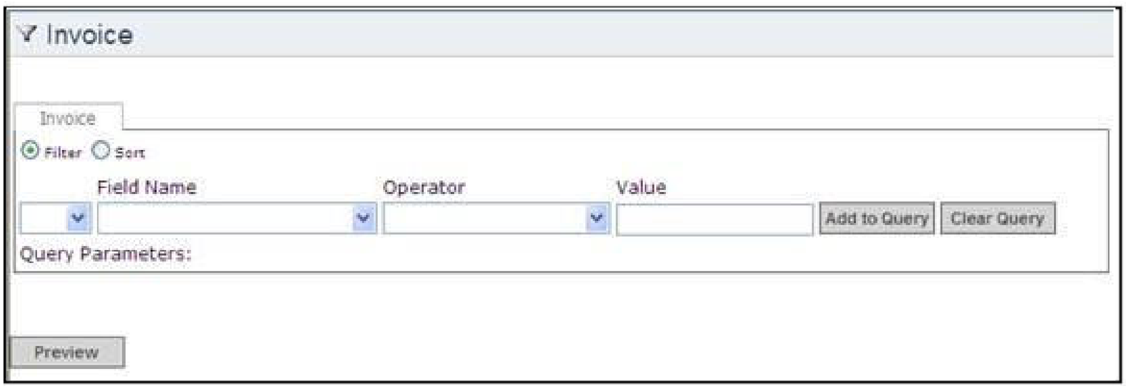
To generate a report and select its output options:

Path:) Reports > Accounting Reports > Invoice

or,

Path:) Legacy Reports > Accounting Reports > Invoice

1. Follow the above path to display the Invoice screen. By default, the Filter is displayed.



2. Clicking the **Preview Only** button at this point will result in output for all the records (invoices) in the system.

   The filter allows you to select invoices according to specified filter criteria and then generate a report showing the results of that filter.

3. Enter or select information for the following.

Field Name 

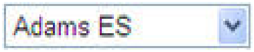
Click  to display a list of invoice field names and select a name from the list (i.e Account Name, Approver, Requester, etc.). The field names in the list will be determined by the type of report that was selected and the parameters selected in Report Writer. See, *Creating a New Report with the Advanced Report Editor* in the Tyler's Versatrans Report Writer User's Guide.

Operator 

Click  to display a list of operators and select an operator from the list (i.e. is equal to, contains data, etc.).

Depending on the type of operator selected, the Value field may or may not display.

Note: *When filtering reports, in order to multi-select values for a field, You must use the operator "is in". For example, to select multiple accounts to run an Account Listing report against, you must specify Account Name "is in" and then select all accounts you wish to run the report against.*

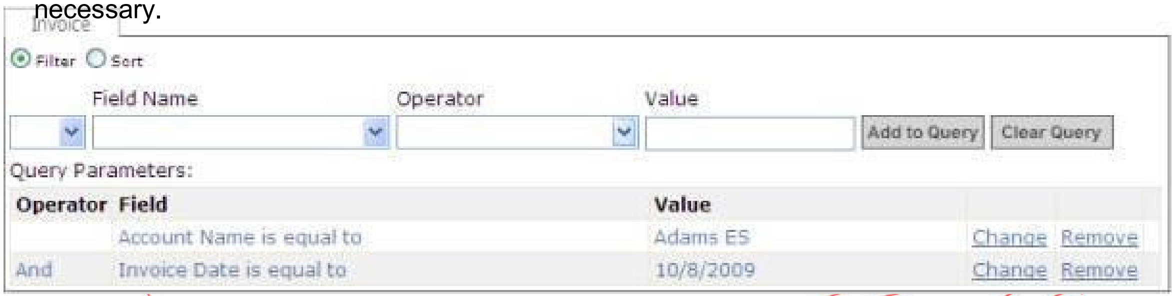
Value 

4. Click to display a list of values and select a value from the list. The values in the list will be determined by the type of report that was selected. The query will look as follows.

5. Click **Add to query** to add the query to the filter.

Query added to filter

6. To continue adding to the query, click the **And** or **Or** drop-down button and choose either **And** or **Or** and enter /select Field Name, Operator, etc. This process can be repeated as often as necessary.

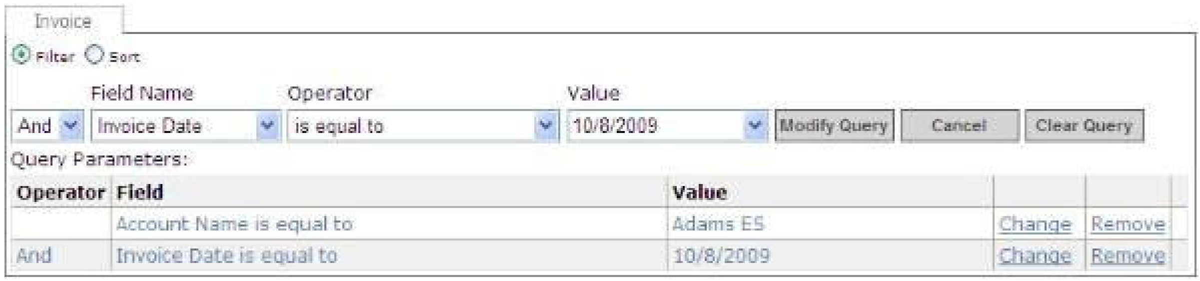


And or **Or** drop-down button

Click to make changes to a query

Click to remove a query

7. Click Change to modify a query. For example, we have clicked the change link for “Account Name is equal to Adams ES”.



8. The query fields are populated with the Field Name, Operator, and Value of the query that you selected to make changes to. Make the desired modifications and click . For example, we have changed the Value “Adams ES” to “Harrison ES”.

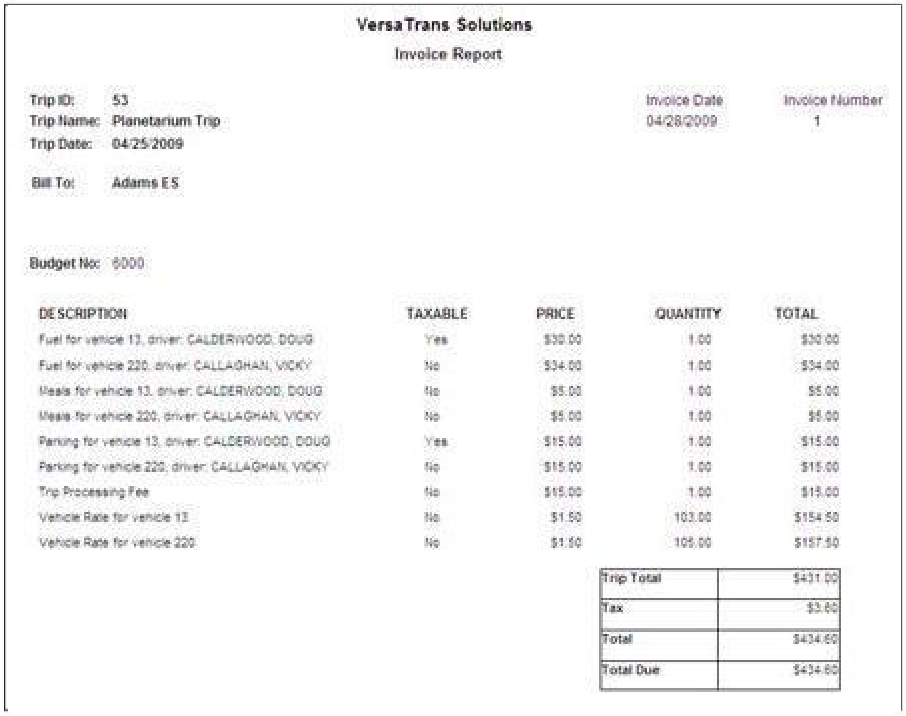
Changed Value from “Adams ES” to “Harrison ES”

9. Click Remove to remove a query.

10. When you are finished building your query, you can click to see a preview of your report or click to sort your report using fields.

Note: *Sorting and filtering can be used by themselves or in conjunction with each other.*

The following is an example of a report in preview mode.



VersaTrans Solutions

Invoice Report

Trip ID: 53
Trip Name: Planetarium Trip
Trip Date: 04/25/2009

Invoice Date: 04/28/2009
Invoice Number: 1

Bill To: Adams ES

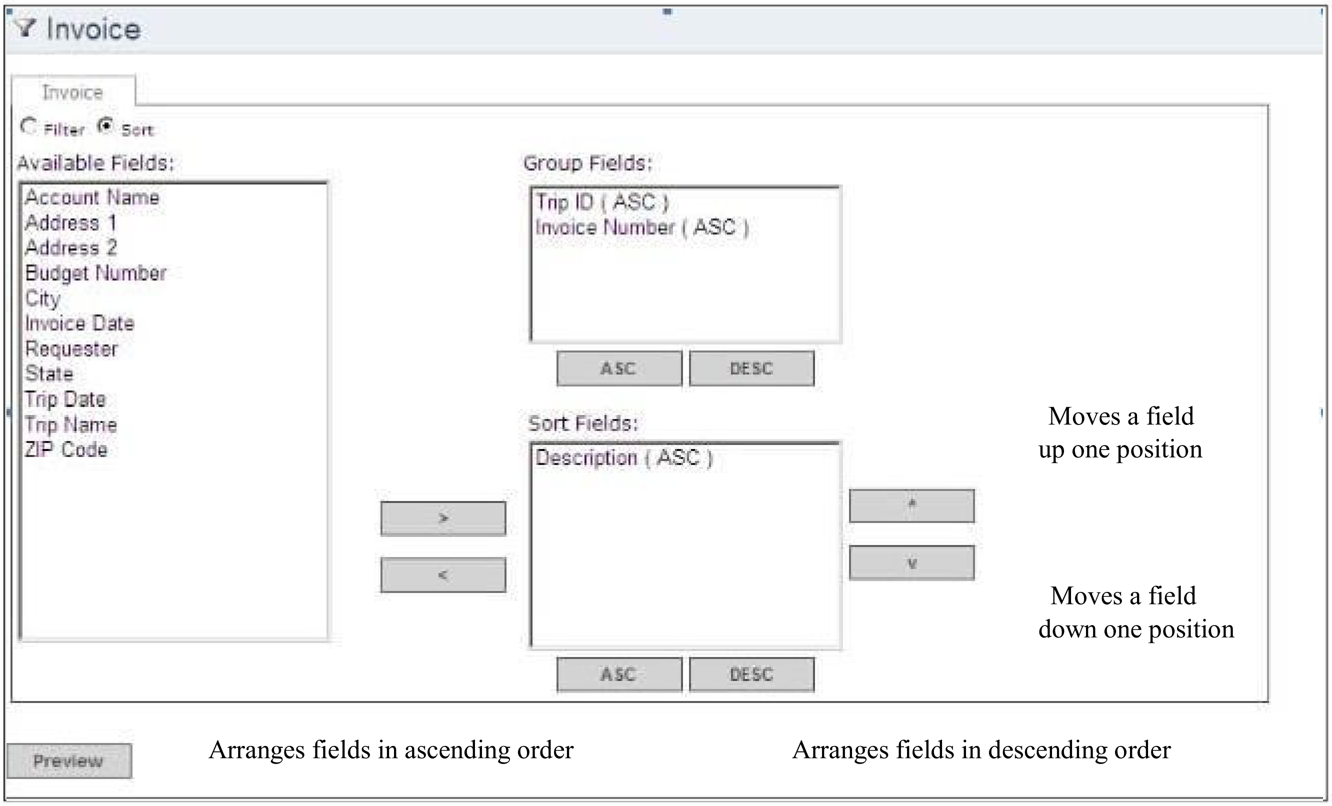
Budget No: 6000

DESCRIPTION	TAXABLE	PRICE	QUANTITY	TOTAL
Fuel for vehicle 13, driver: CALDERWOOD, DOUG	Yes	$30.00	1.00	$30.00
Fuel for vehicle 220, driver: CALLAGHAN, VICKY	No	$34.00	1.00	$34.00
Meals for vehicle 13, driver: CALDERWOOD, DOUG	No	$5.00	1.00	$5.00
Meals for vehicle 220, driver: CALLAGHAN, VICKY	No	$5.00	1.00	$5.00
Parking for vehicle 13, driver: CALDERWOOD, DOUG	Yes	$15.00	1.00	$15.00
Parking for vehicle 220, driver: CALLAGHAN, VICKY	No	$15.00	1.00	$15.00
Trip Processing Fee	No	$15.00	1.00	$15.00
Vehicle Rate for vehicle 13	No	$1.50	103.00	$154.50
Vehicle Rate for vehicle 220	No	$1.50	105.00	$157.50

Trip Total	$431.00
Tax	$3.60
Total	$434.60
Total Due	$434.60

11. For information on how to print or export a report, see *Printing and Exporting a Report* on page 259.

12. You have the option of sorting on report fields. Click Sort to display a panel that allows you to select the available fields. Sorting can be used by itself or in conjunction with a filter.



13. Look through the list of report fields and select the field(s) that you want to sort on.

14. Click > and the selected field(s) are moved to the Sort Fields panel. Click < to move field(s) out of the Sort Fields panel.

15. When you are done setting up the sort fields, you will want to select an output for the report. For information on how to print or export a report, see *Printing and Exporting a Report* on page 259.

Printing and Exporting a Report

To print or export a report:

Path:) **Reports > Accounting Reports > Invoice**

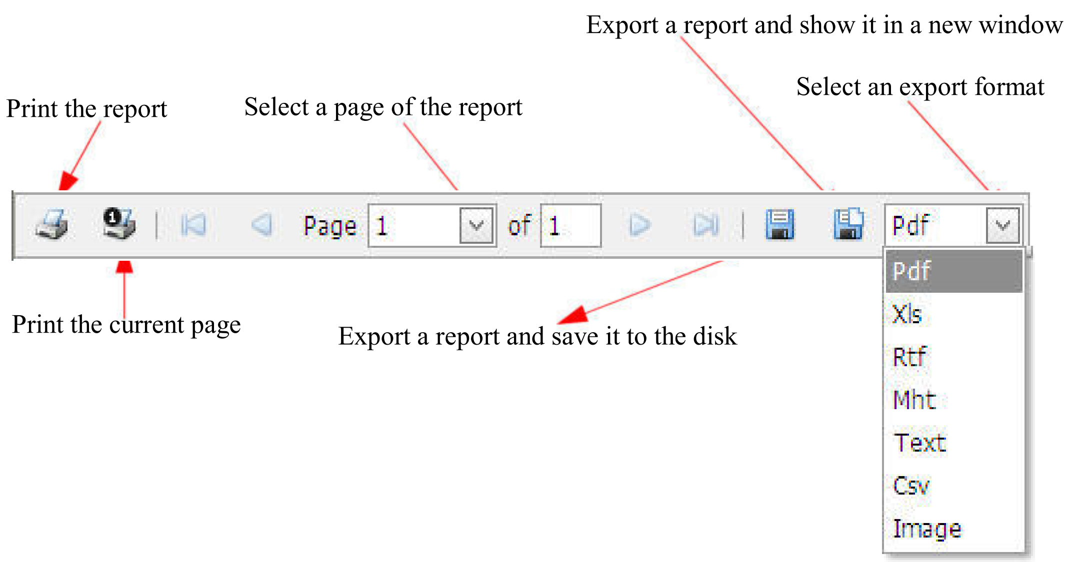
or,

Path:) **Legacy Reports > Accounting Reports > Invoice**

1. Follow the above path to display the Invoice screen. By default, the Filter is displayed.
2. Follow the instructions in *Generating Reports in Triptracker* on page 255 to create a report.

3. Click Preview.

4. In the preview screen, you can print the report and/or export the report.



Saving and Using a Report Search

You can save any number of report searches and they will be added to a list for later use.

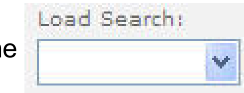
To save a report search and then use the saved search:

Path:) **Reports > Accounting Reports > Invoice**

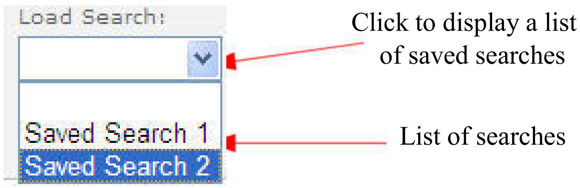
1. Follow the above path to display the Invoice screen. By default, the Filter is selected.

2. Set up and run a report search as described in *Generating Reports in Triptracker* on page 255.

3. In the **Save As** field, enter a name for the search.
4. Click 

. The search is added to a list accessible from the 

drop-down button.
5. To use a report search that was previously saved, click the **Load Search** drop-down button to display a list of saved searches.



6. Select the desired search from the Load Search list and click 

. The selected search is loaded into the filter.
7. To delete a saved search, select the search from the Load Search list and click 

.

Appendix A

Setting Up Security & Email

Topics In This Appendix:

Security Overview

User security is a significant issue in the Triptracker system. There are three areas of particular concern:

1. Accounts - Access to budget information and the ability to change these records
2. Employees - Access to sensitive information and the ability to change employee records
3. System Administration - Ability to add and remove privileges and views of the Triptracker system

Setting Up User Groups & Users

We set up a limited administrative user for the Triptracker system to allow you to enter the system. Once you get in, you need to set up the administrative privileges and other user groups for the other types of users who require access to the system. Remember to change the password for the admin account immediately to preserve the security of the Triptracker system. See *Changing Your User Profile* on page 274 for these instructions. However your organization functions, setting up the admin user is your first task.

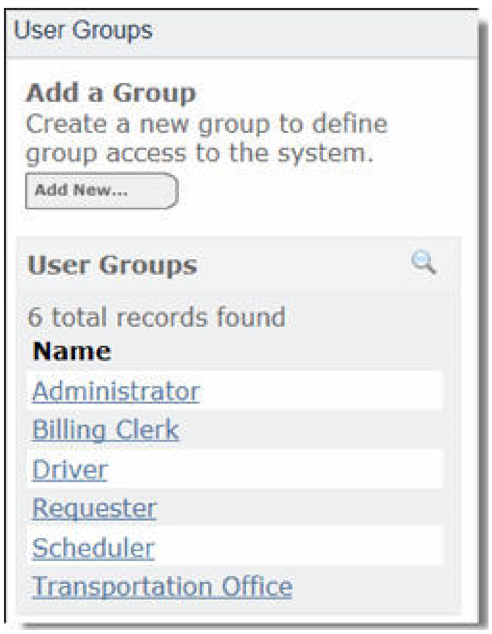
Adding a User Group and Assigning Privileges

User Groups are a way to categorize users and control their access to the functions in Triptracker by granting by privileges. Even if only one person is using the Triptracker system, you must create a system administrator's user group. You can establish privileges for other groups as different users with different needs. For example, you might not give an accounting person the same kind of access to Triptracker that you would to a data entry person. Human Resources may need access to the employee records in Triptracker but not to trip scheduling. Since their purpose in using Triptracker is different, their access privileges should be different. User groups help you manage those diverse groups of users.

To add a user group and assign privileges:

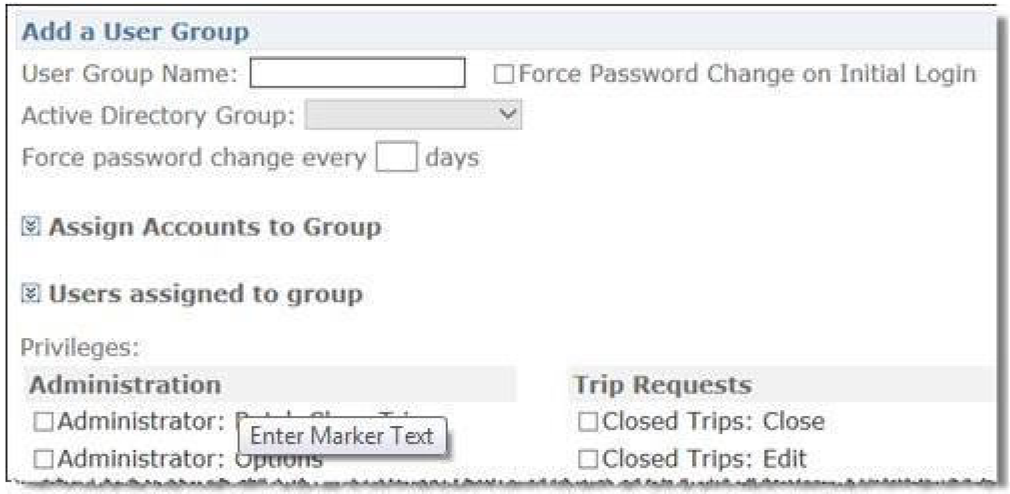
Path:) **Admin > User Groups**

1. Follow the above path to display the User Groups screen.



The User Group screen lists all the User Groups currently available in the system.

2. Click  to display the Add a User Group screen.



3. Type “Administrators” or the appropriate name of the group in the **User Group Name** field.

   Force Password Change on Initial Login
   Allows accounts to be associated with User Groups. Accounts associated with a specific Triptracker user will over-ride the group level assignment.

   Active Directory Group
   Click the Active Directory Group drop-down arrow to display a list of Active Directory groups. You can select the AD group that you want to map to Triptracker. For information on how to enable Active Directory, see the Versatrans Triptracker Configuration Utility Help System, *Configuring Active Directory.*

   Force password change every __ days.
   Compares the current date to the users “LastPasswordChangedDate" to determine if the user should be forced to change their password.

   Note: *If there is a value entered for Force “Password Change” for a User Group, then that value will override the value entered in System Options.*

4. Click the scroll bar to scroll up and down the list of permissions.

5. In the permissions list, click the check boxes of the permissions that you want to assign to this user group and then click to save these permissions.

Caution: ***Familiarize yourself with the Triptracker system thoroughly before you choose user group permissions. You could jeopardize the security of the Triptracker system if you do not understand these permissions.***

For any non-administrator-type user, carefully review the options in the list and weigh which kinds of users need to have access to each right. Click each check box that applies to the whole group.

If a particular person needs permissions slightly different from others in his or her group, select another user group to differentiate that user. We recommend that you do not grant permissions to a whole group based on what one or two people in the group require.

You can refer to the following security definitions when setting up your user groups.

Administration

Administrator: Batch Close Trips
Allows for batch closing of trips that have a status of Completed, Awaiting Payment, Partial Payment, or Paid.

Administrator: Options
Enables access to: System Options and System Email Options.

Administrator: Super User
Enables access to all functionality within Triptracker.

If you are a super user, you can override any thresholds defined in the System Options.

Administrator: Trip Delete
Enables access to: Trip Delete for deleting individual or a batch of canceled and closed trips.

Override: Advance Notice of Trip Cancellations
Allows overriding of the Advance Notice of Trip Cancellations setting.

Override: Closed Dates/Times for Trips
Allows overriding Closed Dates and TImes for Trips.

Override: Insufficient Funds
Allows overriding the Insufficient Funds setting.

Override: Maximum Number of Trips per Day
Allow overriding the Maximum Number of Trips per Day setting.

Override: Maximum Number of Vehicles per Day
Allows overriding the Maximum Number of Vehicles per Day setting

Override: Time Thresholds
Allow overriding of the Time Thresholds for Trip Requests setting.

Pick Lists: Edit
Enables access to: create client defined drivers or monitor aides assignment lists (Pick Lists).

System Lists: Edit
Enables access to: Activity Types, Certifications, Charge Basis, Drug Test Types, Employee Titles, Employee Types, Fiscal Periods, Invoice Charges, Job Categories, Trip Locations, Trip Types.

User: Accounts Edit
Enables access to: User Setup for creating and editing users within the system.

User: Groups Edit
Enables access to: User Groups for creating and editing user groups within the system.

Employees

These permissions enable access to specific pieces of functionality within the employee records.

Employees: Edit Calendar
Enables access to viewing/editing data on the employee's calendar.

Employees: Edit Certifications
Enables access to viewing/editing certifications for employees.

Employees: Edit Details
Enables access to editing general information provided in the employee record.

Employees: Edit Drug Tests
Enables access to viewing/editing drug test information for employees.

Employees: Edit Pay Rate
Enables access to viewing/editing salary information for employees.

Employees: Edit Pick Lists
Enables access to adding or removing an employee to/from a Pick List from the employee's page.

Employees: Edit Seniority
Enables access to editing seniority rankings among employees.

Reports

Reports: Accounting
Enables access to: Account Balance Report, Balance Due (Aging Report), Cost Detail Report, Invoice Report, Trip Payment Report.

Reports: Custom
Enables access to: all reports that come under custom reports.

Reports: Edit
Enables access to: the Report Writer for creating and editing new reports.

Reports: Employees
Enables access to: Certification Listing Report, Employee Listing Report, Refused Trip Detail Report, Summary of Driver Time Report.

Reports: Listing View
Enables access to: Accounts Report, Buildings Report, Trip Locations Report, Vehicles Report.

Reports: Trip
Enables access to: Cancelled Trips Report, Driver Trip Sheet Report, Trip Listing by Account Report, Trip Listing Detail Report, Trip Status History Report.

Transportation

Within the Calendar, these permissions enable a user to access notes or view the calendar.

- Transportation Calendar: Add Notes
- Transportation Calendar: Delete Notes
- Transportation Calendar: Edit Notes
- Transportation Calendar: View

Miscellaneous

Miscellaneous: Change Password
Enables access to: allow individual users to change their login password.

Trip Requests

Within the Trip Request process, these permissions enable a user to access data on the closed trips page.

- Closed Trips: Close
- Closed Trips: Edit
- Closed Trips: View

Within the Trip Request process, these permissions enable a user to access data on the approve trips page.

- Trip Approval: Approve or Reject
- Trip Approval: Cancel
- Trip Approval: Edit
- Trip Approval: View

Within the Trip Request process, these permissions enable a user to access data on the trip completion page.

- Trip Completion: Add Trip Completion Info
- Trip Completion: Edit
- Trip Completion: View

Within the Trip Request process, these permissions enable a user to access data on the trip invoicing page.

- Trip Invoicing: Create
- Trip Invoicing: Edit
- Trip Invoicing: View

Within the Trip Request process, these permissions enable a user to access data on the trip payments page.

- Trip Payments: Create
- Trip Payments: Edit
- Trip Payments: View

Within the Trip Request process, these permissions enable a user to access data on the trip request page.

- Trip Request: Cancel
- Trip Request: Create

Trip Request: Create For Other Requestors
If you have the correct security permissions, you can request trips and edit requested trips on behalf of other individuals that are considered Requesters.

When this permission is checked, you can request either for yourself or for other employees. You will still only have access to the accounts listed on the User Record but can then choose the name of any of the requesters associated with the account.

Trip Request: Edit
If the System Option "Restrict Assignment of Driver is checked, then Trip Schedule: Edit is all that is needed to change the driver assignment on the refusal link.

If Trip Scheduling: Change Driver Assignment is checked, then you can enter a refusal but have to accept the driver selected based on the Pick List.

For more information, see *Restricting the Selection of Drivers for a Trip* on page 128.

Trip Request: Express Trips
Enables the user to automatically approve the trip and go straight to the scheduling stage. This would typically be used by someone in the Transportation office only.

Trip Request: View All Trips
Enables the user to search for and view trips associated with any account that the user has access to.

Within the Trip Request process, these permissions enable a user to access data on the trip scheduling page.

- Trip Scheduling: Cancel
- Trip Scheduling: Change Driver Assignment

If the “Restrict Assignment of Driver” system option is checked and you don’t have the permission “Trip Scheduling:Change Driver Assignment” permission checked, then you won’t be able to manually select a driver and the next driver in the rotation will be automatically selected. For more information, see *Restricting the Selection of Drivers for a Trip* on page 128.

Trip Scheduling: Change Driver Assignment on Driver Refusal
if you have this eligibility checked, you can over-ride the driver selected.

- Trip Scheduling: Schedule
- Trip Scheduling: View

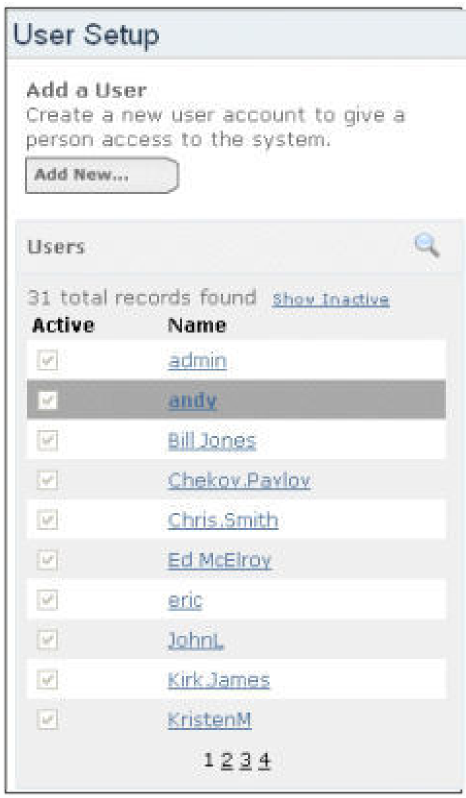
Setting up a New User

The User Setup feature described below allows clerks or administrators to create new users and passwords, as well as assign new users to accounts and user groups. The user group the user is assigned to determines what options and data the user is able to access. Access to certain functionality and data are restricted to those items included in the user group's respective security permissions. See, *Adding a User Group and Assigning Privileges* on page 265.

To setup a new user:

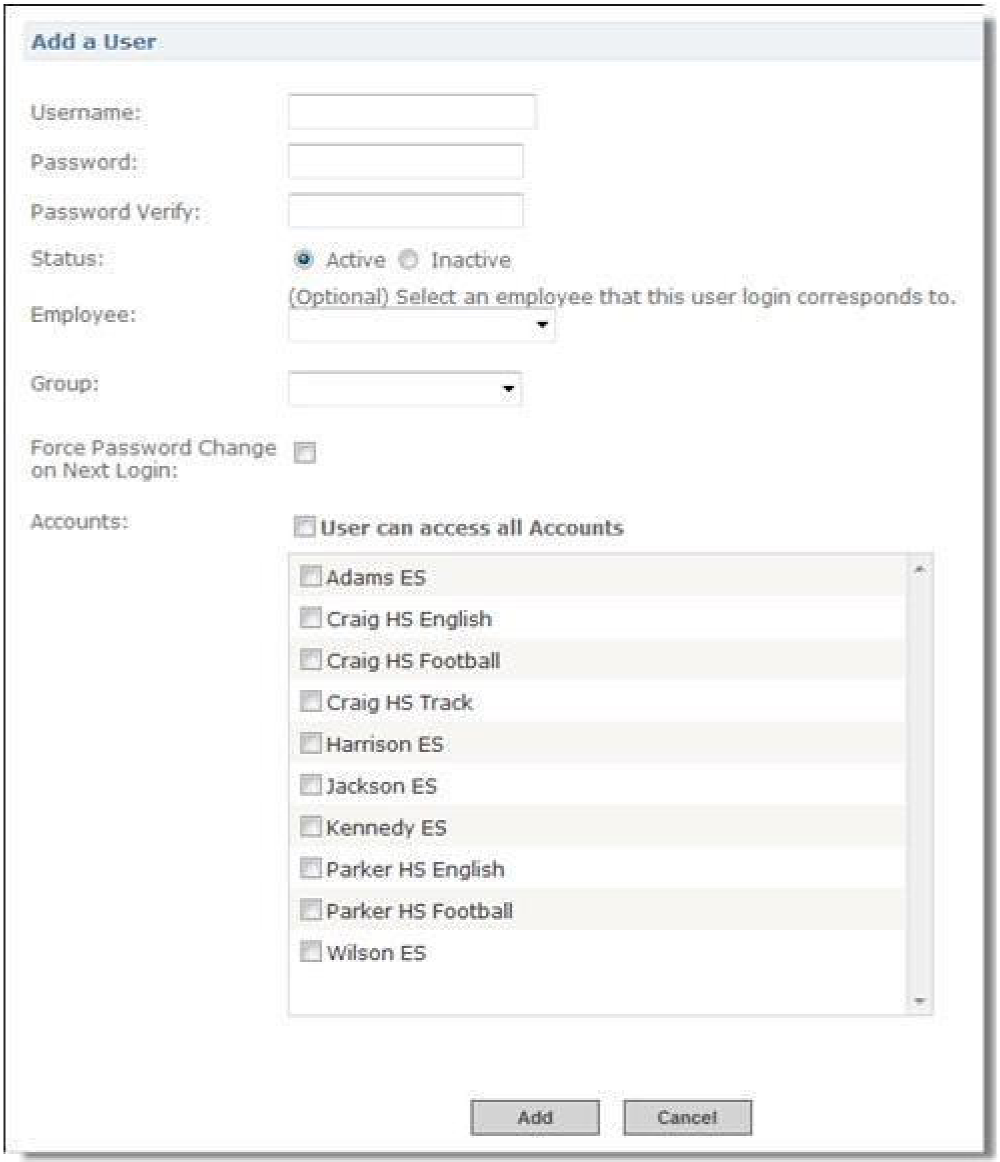
Path:) Admin > User Setup

1. Follow the above path to display the User Setup screen.



The User Setup screen lists all the Users currently available in the system.

2. Click to display the Add a User screen.



3. Enter the username

Enterprise ERP Integration
When setting up users, you need to make sure the usernames and passwords that you setup in Triptracker are an **"exact match"** (including upper and lower case) to the usernames and passwords you are using in Enterprise ERP. The person(s) setting up Enterprise ERP should be able to tell whoever is setting up Triptracker what the Enterprise ERP usernames and passwords are or will be. An integration failure will result if this procedure is not followed.

4. Enter a password. By default the password must be at least 5 characters long and adhere to the “***Min special characters in password”*** and “***Min characters in password”*** settings as specified in the Triptracker Configuration Utility.
5. Click Active or Inactive.
6. *Optional.* Click in the Employee field and select an employee that this user login corresponds to. The security question and answer fields will be displayed at the bottom of the screen.
7. Click in the Group field and select the group that you want the user assigned to. The Group that the user is assigned will determine that users security permissions.
8. Click **Force Password Change on Next Login to** allow the user with Administrator permissions to force a password change for any new user the next time they log in.
9. *Optional.* Enter a valid e-mail address where you want your password sent in the event that it is forgotten.

   Note: *This e-mail address is also used for sending trip messages to Users/Employees who are added to the Contacts/Requestors tab of an account.*

10. Enter the same e-mail address again in the **Confirm Email** address box.
11. *Optional.* Click the drop-down button in the **Choose Security Question** box to display a list of security questions. Choose a security question.
12. Enter an answer for the security question in the **Answer Security Question** box.
13. Click Add to save the data.

Changing Your User Profile

To change your user profile:

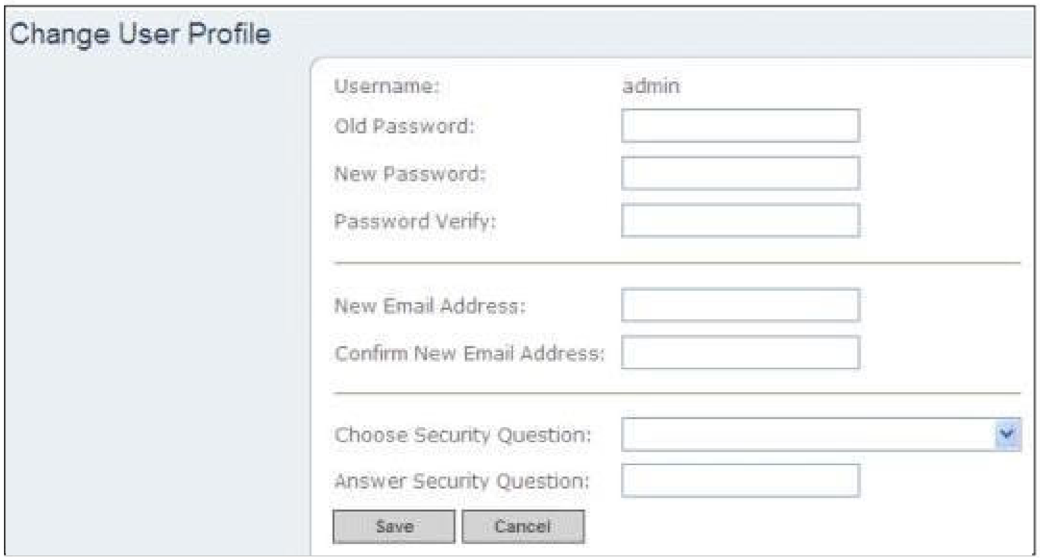
Path: **Admin > Change User profile**

1. Follow the above path to display the Change User profile screen.

2. Type your Old Password, New Password and new password again in the corresponding fields.

3. Click and you will receive a message that your password was updated successfully.

   If you have enabled password retrieval, (see, *Setting the System Options* on page 6) the following screen displays.



4. You have the additional option of entering a new email address and/or security question and answer.
5. Click 

 and you will receive a message that your email address and/or security question and answer was updated successfully.

Email Messaging System Overview

You can manage who gets what email messages and when they get them. Here are some questions you might ask yourself when you set up your Triptracker messaging strategy:

Who gets email?

In the Email Options screen, we have set up the user roles (Requesters, Approvers, etc.) that determine who can receive email notifications pertaining to the stages of a requested field trip. The following user roles could potentially get email.

Account Contacts

Account Contacts are employees who are identified as contacts on the Accounts page (for the Account on the Trip Request) with Contact Type of “Billing” or “Both”. Here you can establish at what stage in the trip precess the person financially responsible for an account is notified of important budget events.

Requesters and Approvers

The requester is the requester selected on the Trip Request page. The approver is an employee/approver on the Current Approval Level of the trip. You determine at what stages the system can email the trip requesters and approvers. When you select an option in this list, the system can send email messages for that stage. If you do not select an option in this list, emails cannot be sent for that stage. You can select different options for Requesters than you do for Approvers.

Scheduler

A scheduler is anyone who has permission to schedule trips (Trip Schedule: Schedule) as defined in their User Group and that have access to the Account or All Accounts on the System List/User page. You can determine whether a Scheduler receives an email when there is a trip to schedule and when a trip is canceled.

Billing Clerk

A billing clerk is anyone who has permission to Invoice (Trip Invoice: Create) as defined in their User Group and has access to the Account or All Accounts on the System List/User page. You can determine whether a Billing Clerk receives an email when there is a trip ready for billing and when a trip is canceled.

Driver/Monitor/Aide

A driver/monitor aide is an employee actually scheduled on the trip. You can determine whether a driver/monitor/aide receives an email when a trip is scheduled to them and when a trip is canceled.

When does email get sent?

As trip moves through the trip request process (submission, approval, scheduling etc.) the options that you selected on the email options screen will determine the employees who receive email and the content of that email. The content of the email can be the default message template content or a message template that you have customized (see, *Setting Up Email Message Templates* on page 281).

An email address is entered when you add an employee record. See, *Adding an Employee Record* on page 72.

Setting Up Email

We have created an email system which notifies parties involved with the field trip about the status of the trip automatically (according to your email option settings).

To use the messaging capabilities of Triptracker, you must first perform the following tasks in the order presented below:

1. *Adding a User Group and Assigning Privileges* on page 265
2. *Setting up a New User* on page 272
3. *Adding Account Records* on page 157
4. *Adding Contacts/Requesters to an Account Record* on page 162
5. *Setting Up Approval Paths* on page 168
6. *Specifying Who Gets Email and At What Stages* on page 278.
7. *Searching for and Entering Email Addresses* on page 279
8. *Setting Up Email Message Templates* on page 281

Make sure to complete steps 1 through 5 before you begin steps 6 through 8 described in the section below.

Specifying Who Gets Email and At What Stages

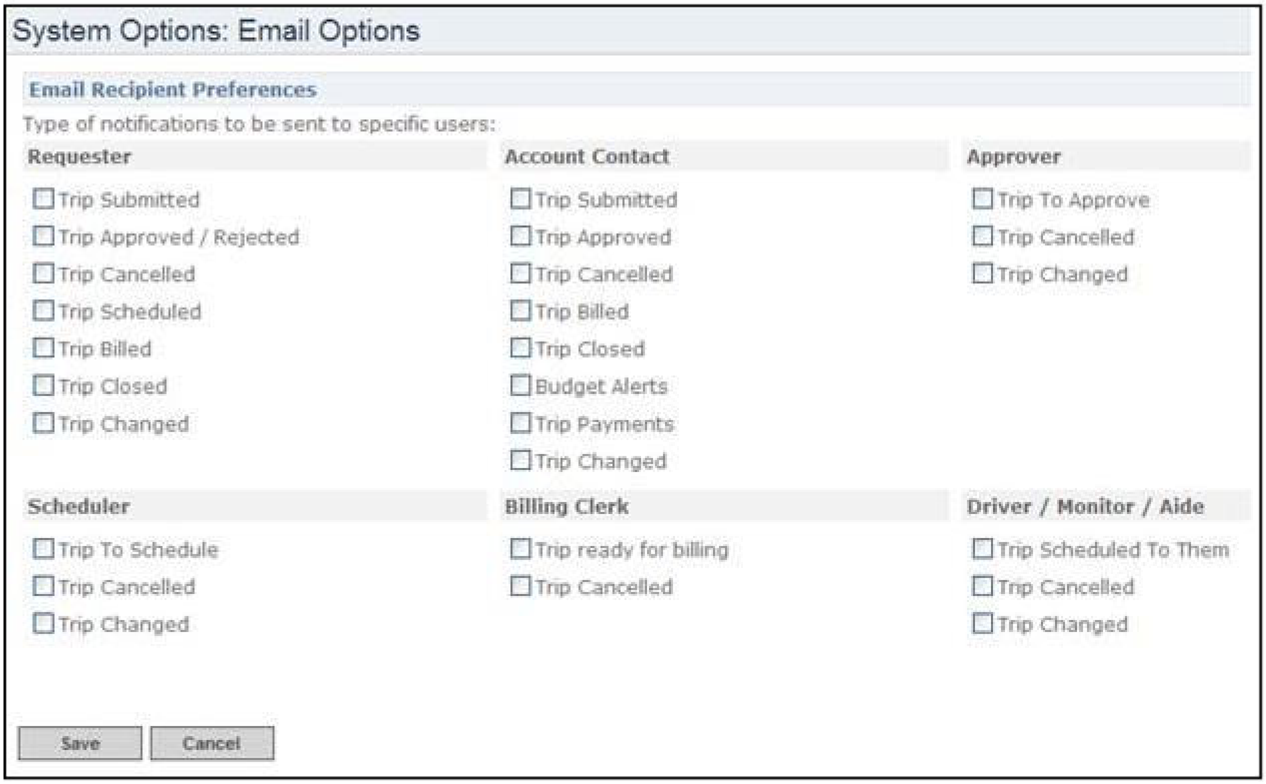
The Email Options screen allows you to identify who gets messages and at what stages. Recipients in this case are Requesters, Account Contacts, Approvers, Schedulers, Billing Clerks and Drivers/Monitors/Aides.

> ***Note:*** *This should be the first place you check if an employee is having issues with receiving e-mails. These options are global and will apply to the entire system.*

To specify who gets email and at what stages:

Path:) Admin > System Email Options

1. Follow the above path to display the System Options: Email Options screen.



2. For each type of recipient you want to send email to (Requester, Approver, etc.), place a check in each check box to represent the emails you want to send.

   For example, if you want Requesters to be sent emails when the field trip is scheduled but not when it is approved/rejected, click the Trip Scheduled box but not the Trip Approved/Rejected box.

3. Click 

to save your selections.

Searching for and Entering Email Addresses

Before an employee can receive an email notification, they must have an email address entered in their employee record. The quickest way to identify employees without email addresses is to perform a search which is described below. Once you have a list of employees, you can open their records and enter email addresses.

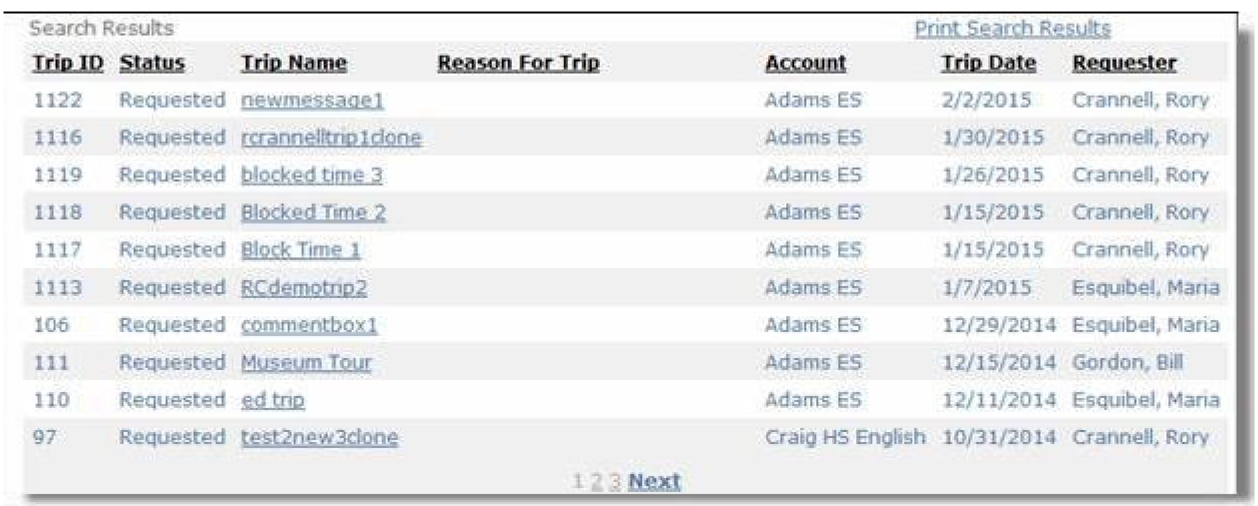
To search for and enter email addresses:

Path:) **Reports > Employee Reports > Employee Listing**

1. Follow the above path to display the Employee Listing screen.

2. Click the **Field** drop-down button and select **Email**.
3. Click the **Operator** drop-down button and select **does not contain data**.
4. Click View PDF to get a report of employees without email addresses.
5. Go to Admin > Employees to display the Employees screen.

6. Enter an employee's information from the report list generated in step 4.
7. Click Search to display the employee search results.



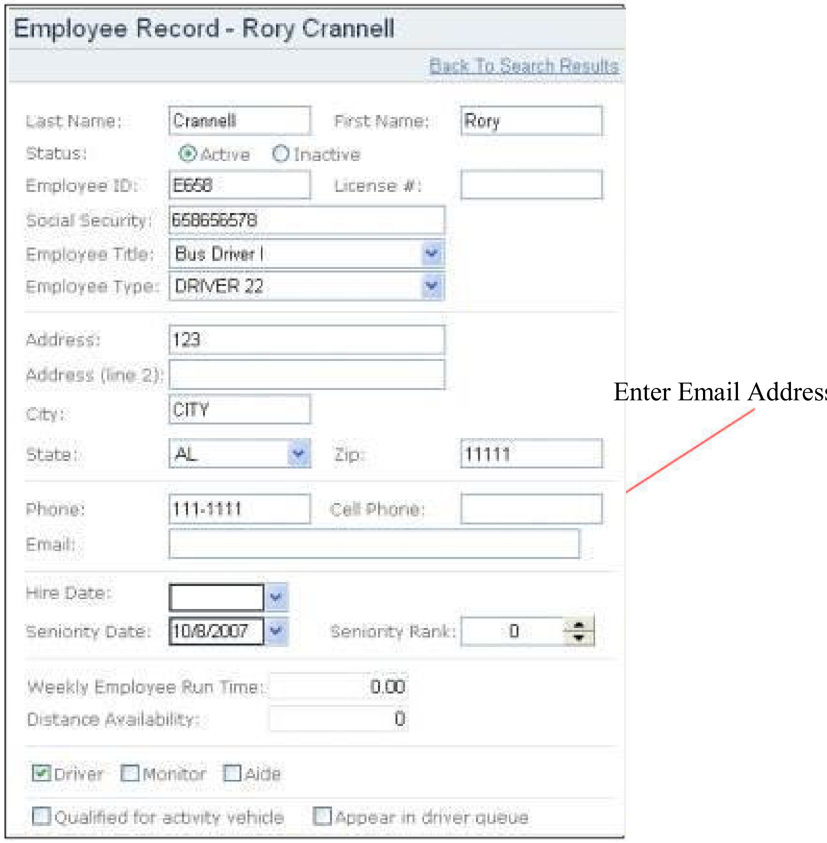
Search Results | Print Search Results

Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date	Requester
1122	Requested	newmessage1		Adams ES	2/2/2015	Crannell, Rory
1116	Requested	rcrannelltrip1clone		Adams ES	1/30/2015	Crannell, Rory
1119	Requested	blocked time 3		Adams ES	1/26/2015	Crannell, Rory
1118	Requested	Blocked Time 2		Adams ES	1/15/2015	Crannell, Rory
1117	Requested	Block Time 1		Adams ES	1/15/2015	Crannell, Rory
1113	Requested	RCdemotrip2		Adams ES	1/7/2015	Esquibel, Maria
106	Requested	commentbox1		Adams ES	12/29/2014	Esquibel, Maria
111	Requested	Museum Tour		Adams ES	12/15/2014	Gordon, Bill
110	Requested	ed trip		Adams ES	12/11/2014	Esquibel, Maria
97	Requested	test2new3clone		Craig HS English	10/31/2014	Crannell, Rory

1 2 3 Next

8. Click on the employees name to display that employee's record.

.



9. Enter an email address and make sure that all the other fields have the required entries.

10. When you are finished making entries, click **Update**.

Setting Up Email Message Templates

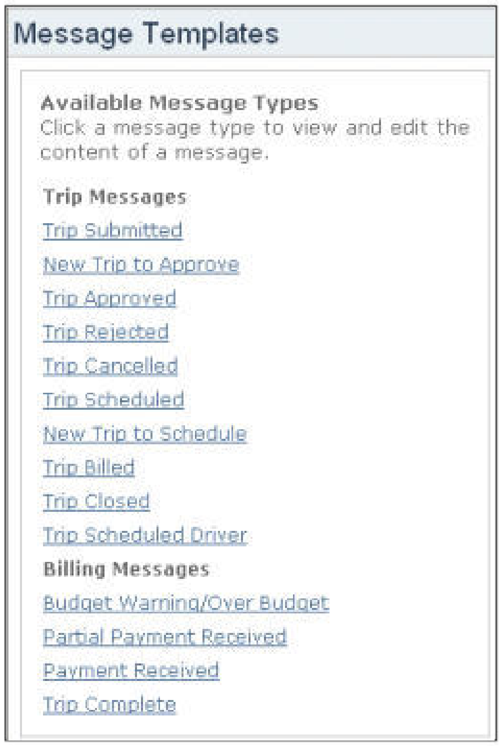
The email system is one of the unique features of Triptracker that make it so helpful. We have created an email system which notifies parties involved with the field trip about the status of the trip automatically (according to your email option settings). Message templates allow you to set up email structures to keep involved parties informed of the trip request status and allow you to complete and bill the account.

Displaying and Editing the Contents of an Email Message

To display and edit the contents of an email message:

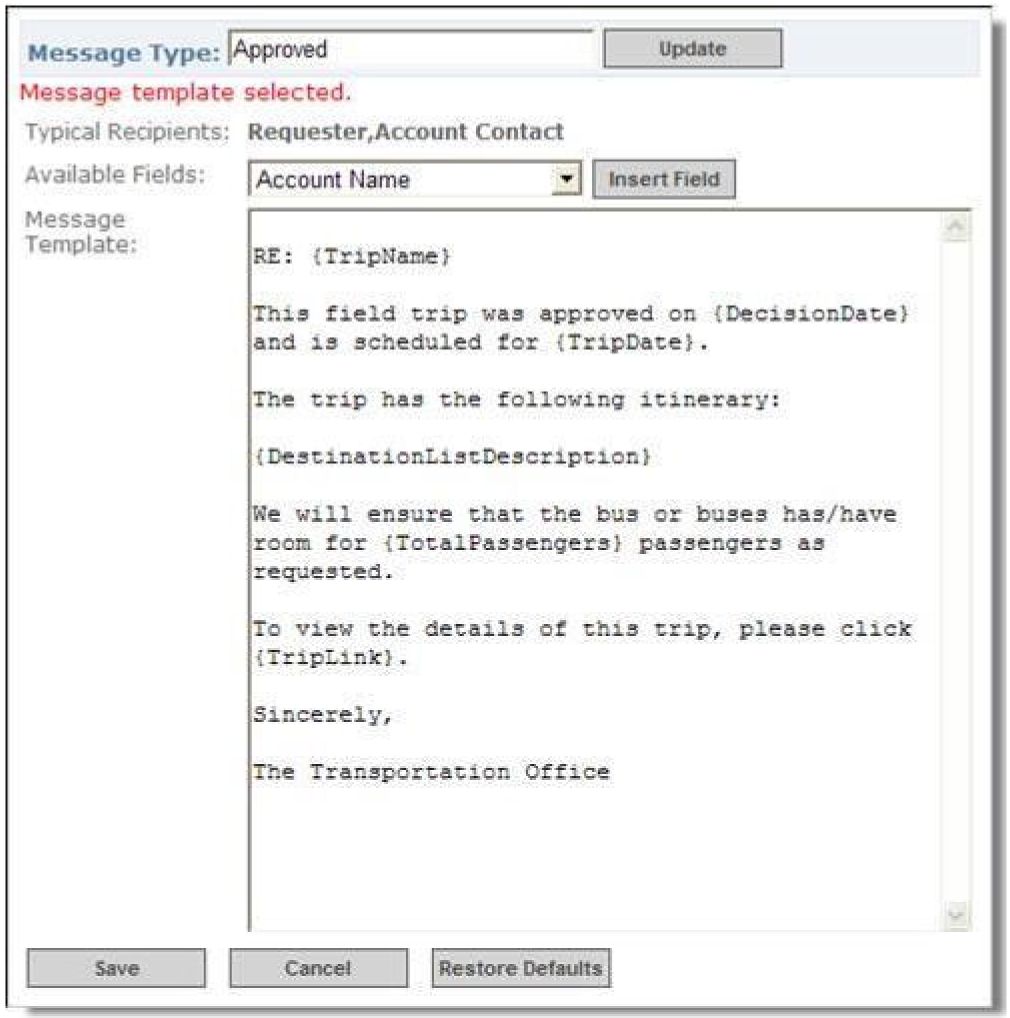
Path:) Admin > Message Templates

1. Follow the above path to display the Message Templates screen.



The Message Template screen lists the available message types. You can use the default template as is or customize the template. Only one message template of each type can be saved and made available. At any time you change the contents of the message or restore it back to its default format.

2. Click a message type to display and edit the contents of a message. For example, click Budget Warning/Over Budget to display a *trip was over budget* template.



You may want to customize the message and take out or add information to the template.

3. You can insert fields in the template by first selecting a field from the Available Fields drop-down list and then placing the cursor where you want to insert the field and clicking Insert Field.
   You can edit the body of the template as you would with any text editor.

Note: *The information in brackets {...}, for example* {AccountName}*, will be converted to data defined on the trip (assuming it is a field in the selection list).*

4. Enter the {AccountName} ({AccountID}) codes so the system can pull that data directly from the account record.
5. At anytime, you can click Restore Defaults to restore the template to it's default format.

6. Click **Save** to save the template. The resulting email might look like this:

From: VersaTransTripTracker@versatrans.com
Sent: Thursday, October 04, 2007 6:19 AM
To: Linda Woodard
Subject: A Trip was Over Budget

Parent-Teacher Association (22)
144 Main Street Latham, NY 12801

RE: Parent-Teacher Association (1452)

You are receiving this message because Parent-Teacher Association (1452) is nearing or has reached its limit of $3,500.00. You cannot schedule another trip without the proper authorization. Your current invoices total $7,000.35 and your currently scheduled trip invoices are estimated at $111.25.

Please contact the Transportation Office immediately regarding this matter.

Sincerely,

The Transportation Office

Appendix B

Backing Up, Restoring & Importing Data

Topics In This Appendix:

Backing Up & Restoring Data

We provide the Database Console for SQL Server as part of Triptracker. This utility is intended to be a tool for the system administrator and does not have to be installed on each workstation. You use this utility to run database backups and restores and make any database update changes that are required. Currently, the database cannot be backed up from within Triptracker.

Caution: ***Routing & Planning and Triptracker data are stored in the same database. If you have both products, <u>careful consideration should be given to restoring the database to prevent data loss.</u> If you restore the database, you are actually restoring the data for both products.***

If you have Fleetvision integrated with Routing & Planning and Triptracker, you need to carefully consider database backups as well. Fleetvision resides in a separate database from Routing & Planning and Triptracker data. Therefore, any changes made to shared data (Employees, Vehicles, Certifications) could become out of synch if you restore an older database for just one of these products.

Backing up Using Database Console for SQL Server

To back up and restore your data using the ToolMS utility, open the Triptracker Database Console for SQL Server. Create a separate backup directory for the database zip file before you begin the process.

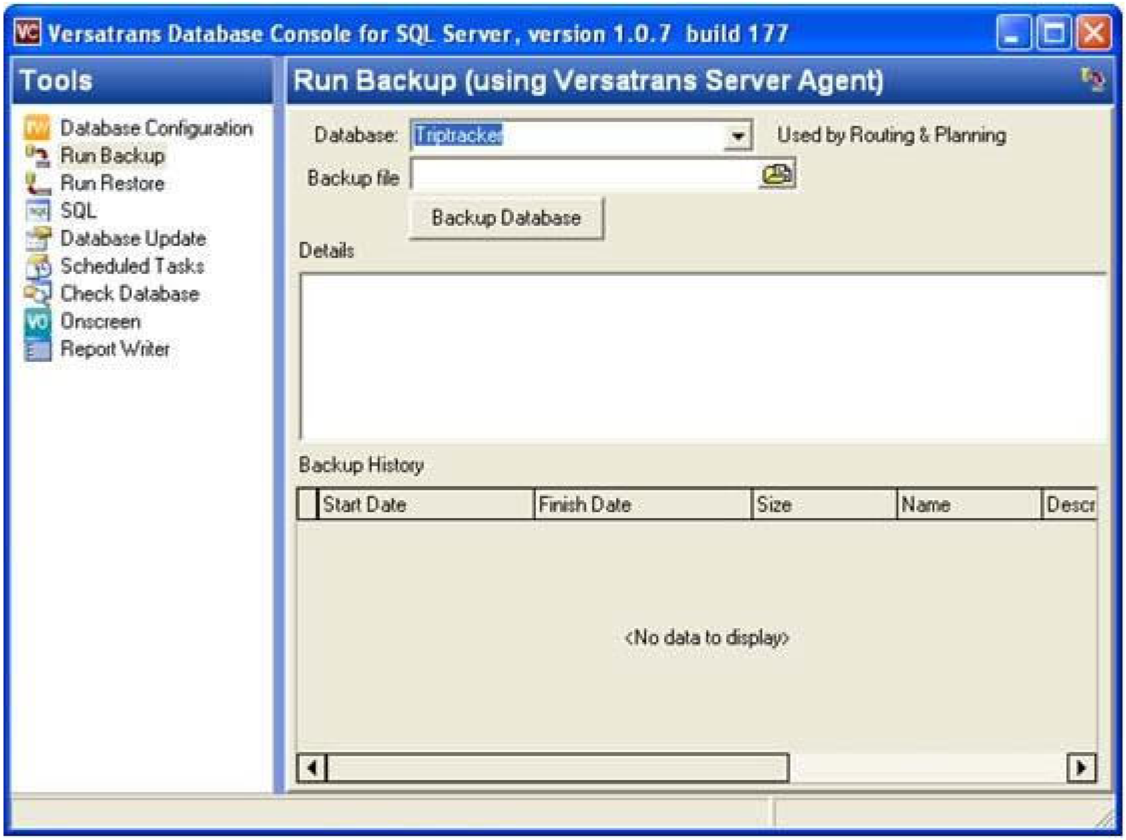
To back up Triptracker data:

Path:) **Start > Programs > Versatrans Suite > Common > Database Console for SQL Server**

If you selected a different Program Manager Group during the installation, this path may be different.

1. In the Versatrans Database Console, check the server name and verify there is a saved value for username and password.
2. Click the **Connect** button and the connection is established.

3. Click the **Run Backup** button in the left side of the console to display the Run Backup screen.



4. Select the appropriate database from the Database drop-down list.
5. In the Backup File field, create or navigate to the backup directory.
6. Click the **Backup Database** button. The system backs up the database into a zip file and shows the results in the Backup History box.

Restoring Your Data from a Backup Using Database Console for SQL Server

Once you back up your data, you can restore it from the database server computer or from one of the client systems. Choose these options carefully to ensure you do not overwrite the wrong database.

> ***Note:*** *Due to permissions and user rights access, it is highly recommended that the database be restored on the server where it is installed.*

Caution: ***When restoring the Routing & Planning and Triptracker datasets that are used for Versatrans e-Link, you must also stop and re-start the e-Link Web Service (eWS).***

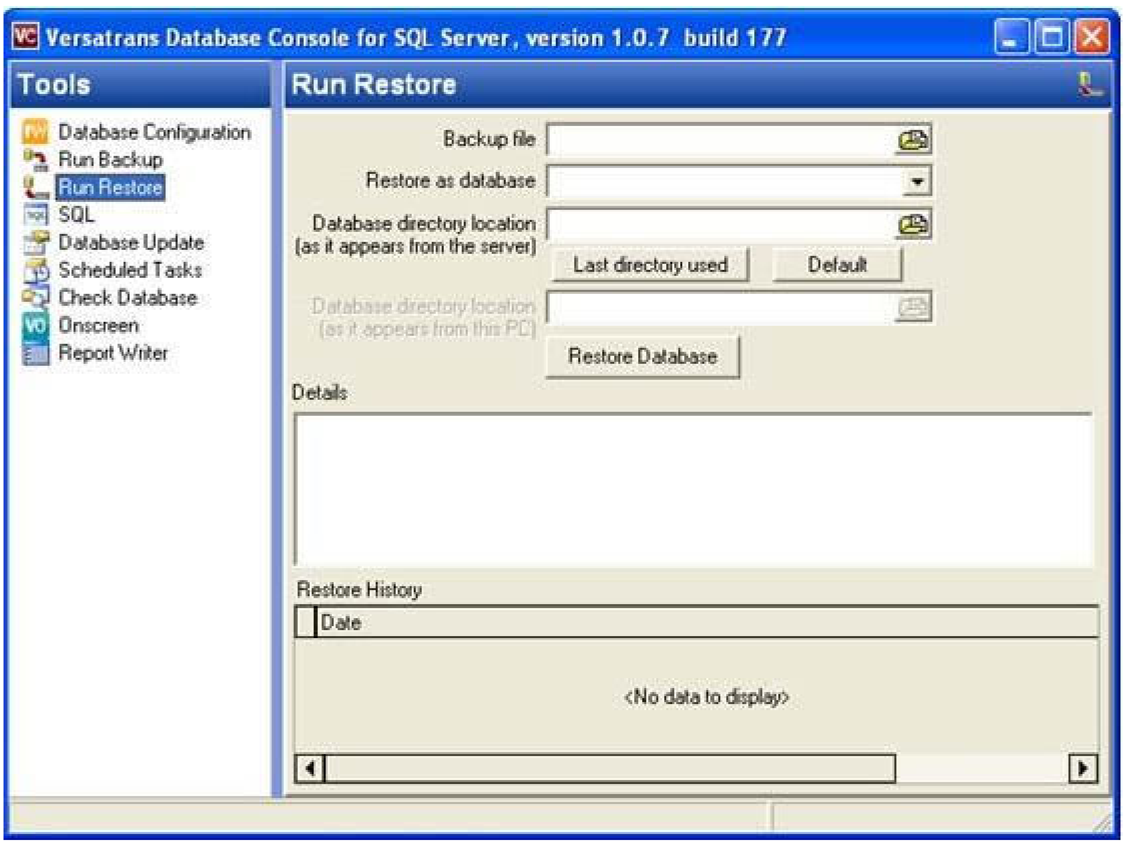
To restore Triptracker data:

Path:) Start > Programs > Versatrans Suite > Common > Database Console for SQL Server

> ***Note:*** *If you selected a different Program Manager Group during the installation, this path may be different.*

1. In the Versatrans Database Console for SQL Server, check the server name and verify there is a saved value for User Name and Password.
2. Enter your Username and Password.

   If you have installed SQL Server prior to the Triptracker installation, you will need to obtain your password and user information from your system administrator.
3. Click the **Connect** button to connect to the server.
4. Click **Run Restore**.



5. Complete the selections in this screen.

   Backup File

   Locate the backup file (either BAK or.ZIP file) you want to restore using the Backup File .

Restore as Database
Select the database you want to restore in this backup into. You may not have more than one. If you are restoring to the same database that displays in this drop-down list, the Database Path from Database Server field does not enable.

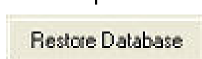
Database Path from Database Server
If this field is enabled, use the  button to select the (drive mapped) path of the database server.

Database Location
If you are restoring the database from the database host system, this path will be the same as the one you selected in the previous field. If you are restoring the database from a client computer, use the  button to select the (drive mapped) path from the client computer to the database server.

6. Click 

to begin the restore process. If you select a different database than the system expects, the system prompts you to confirm that you want to overwrite one database with the other. Click **Yes** to confirm or **No** to select another database.

Note: *When restoring a database in Vista, you may receive a message saying, "Could not create database path … and then the name of the path" (for example, C:\Program Files\Microsoft SQL Server\MSSQL). You will need to grant yourself full control of the MSSQL folder in order to perform the restore.*

7. When the system has completed the restoration, the message *Restore Complete* displays in the text box below the 

button.

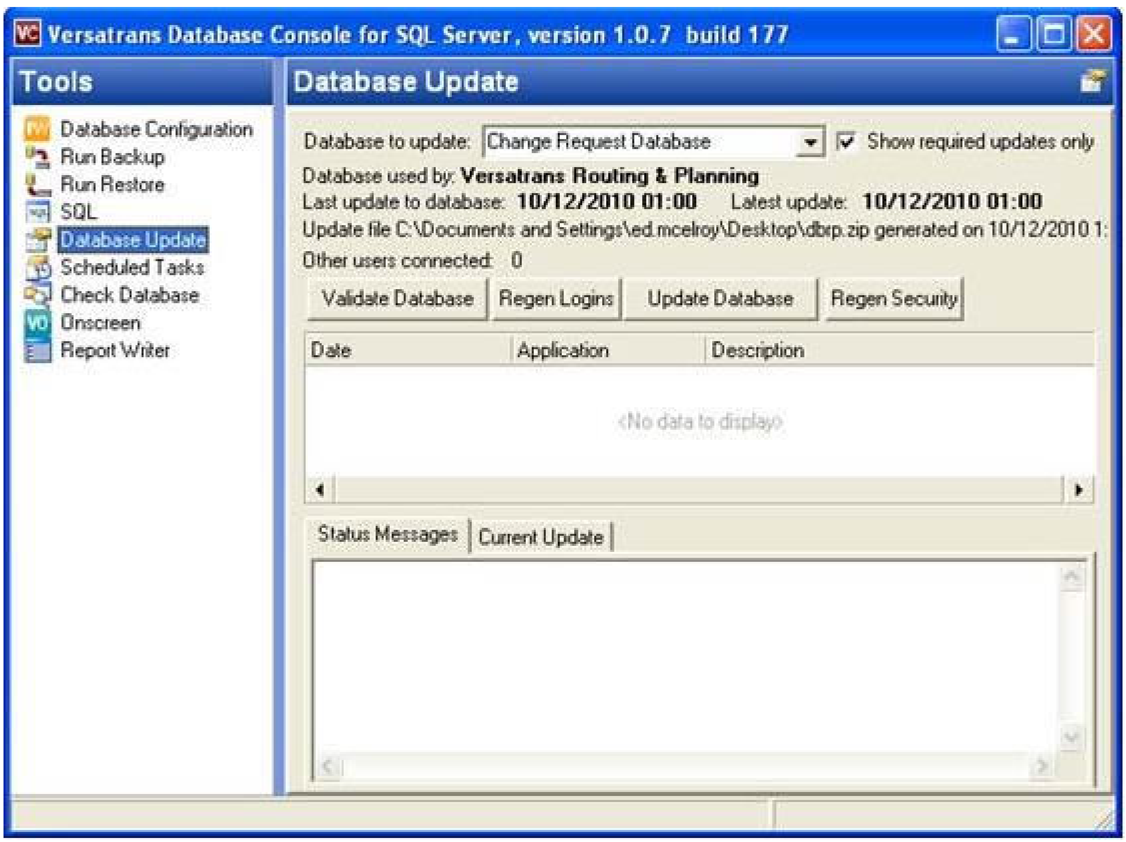
Updating Your Database Using the Database Console for SQL Server

Note: *Prior to updating your databases, you must make sure that all connections to Triptracker and Routing & Planning are closed.*

To update the current database using the Database Update component:

Path:) Start > Programs > Versatrans Suite > Common > Database Console for SQL Server

1. Place the dbrp.zip file in the program directory where the Database Console (ToolMS) program resides.
2. In the Configuration window, click the **Connect** button in the Database Connection Settings box. The button label changes from **Connect** to **Connected**.
3. Click **Database Update** in the left section of the console. The system displays the Database Update dialog.



4. Make sure the correct database displays in the Database to update field and click the **Update Database** button.

   The Status Messages tab displays the update progress.

5. Click the **Validate Database** button to regenerate views that may have reported errors. If error messages continue, contact Versatrans Technical Support.

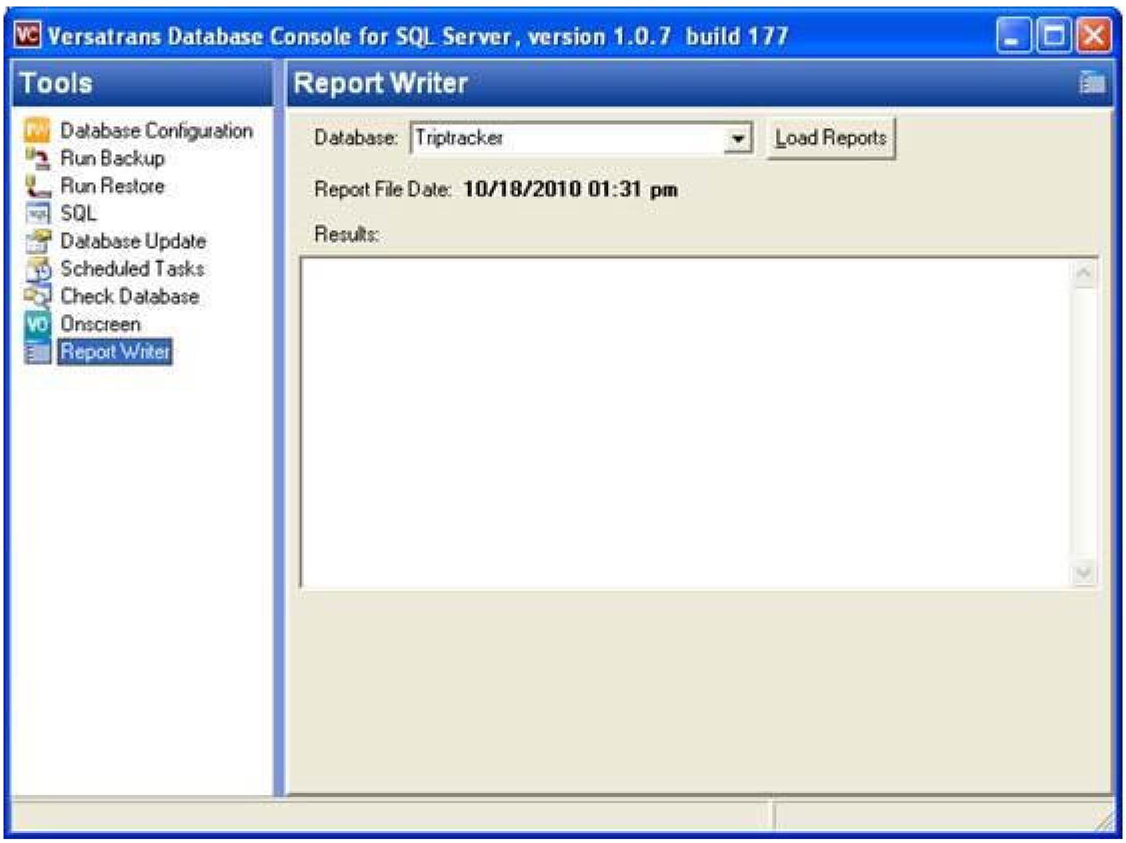
Adding New & Updating Existing Reports Using the Database Console for SQL Server

You can use the Database Console to bring updated reports into your Triptracker database.

To add new & update existing reports:

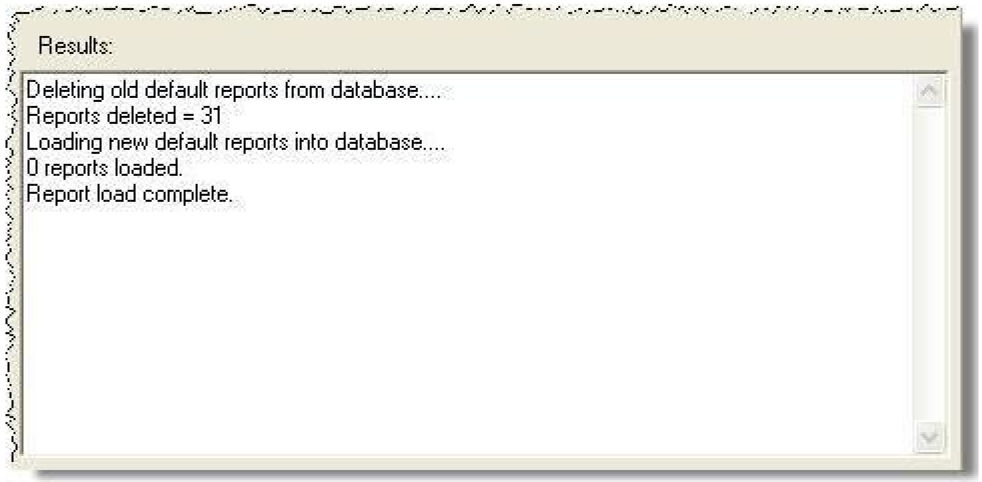
Path:) **Start > Programs > Versatrans Suite > Common > Database Console for SQL Server**

1. Follow the above path to display the Database Console for SQL Server.
2. Apply the latest database updates. See, *Updating Your Database Using the Database Console for SQL Server* on page 290.
3. Click **Report Writer** in the left section of the console. The system displays the Report Writer dialog.



4. Click the Database drop-down button and select the database to be updated.

5. Click the **Load Reports** button and the results are displayed in the “Results” window.



Importing Buildings, Vehicles, Employees, etc.

The Triptracker import utility allows you to import buildings, vehicles, employees, locations, accounts and accounts/contacts/requesters/drivers. The files can be .txt, .csv, .asc, or .tab in either fixed or delimited format. When the import is complete, this information will be available for use in the system.

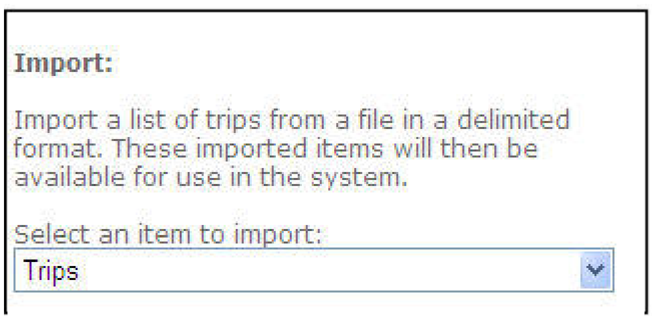
Importing Items Using a Fixed Format

In order to import items using a fixed format, you must first create a fixed width file See, *Creating Fixed Width Files Used for Importing Buildings, Vehicles, Employees etc.* on page 297.

To import Items using a fixed format:

Path:) Admin > Import Utility

1. Follow the above path to display the Import Utility screen.



2. Click  to display a list of items.

The procedure for importing is the same for all items. We will be importing **Employees** for our example.

The employee import allows an existing employee record to be updated. For example, you might import new drivers. At a later date, it has been determined that the seniority date for one or more of the imported drivers has changed. A new file containing the changes is imported resulting in updates to the existing driver records while the unchanged fields remain the same.

3. Select **Employees** to display the import options for employees as shown below.

The checkbox **Allow clearing of blank fields** allows you to clear ‘blank’ fields for an updated employee record. For example, you might import new drivers. At a later date, it has been determined that there are one or more fields where the information is no longer relevant and you want to leave them blank. You select “Allow clearing of blank fields” in the Import Utility. A new file containing the blank fields is imported resulting in updates to the existing driver records while the unchanged fields remain the same.

4. Selected **Fixed** for the type of import. For more information see, *Creating Fixed Width Files Used for Importing Buildings, Vehicles, Employees etc.* on page 297.

5. Click and locate the file that you want to import.
6. Enter the row that you want to start at in the **Start at row** field.

   If there isn't a header line, set the number to 1. Otherwise, enter the number that corresponds to the first row of valid data.

   Specify the field positions
   In the **Start** and **End** boxes, enter how long the fields should be. For example, if the vehicle starts in the first column of the file and it is ten characters in length, enter 1 in the **Start** box and 10 in the **End** box.

7. You do not need to enter Start and End values for every field. Only enter values for the required fields and the fields you are importing.
8. Click to start the importing process. You will be able to preview a sample of your file for accuracy.
9. Click to begin the import process. This will show you the first 10 rows of data in your import file.
10. If there are errors, you can correct the errors in the file that you are importing. When the errors have been corrected, select the file and perform the import again. When your import is successful, you will receive a message indicating how many employees were imported.

Creating Fixed Width Files Used for Importing Buildings, Vehicles, Employees etc.

The system expects the field names to be defined as follows. The field names are not case-sensitive.

Buildings

Table 1.

Screen Name
*Name
*Building Number
Address 1
Address 2
City
State
Zip
Status *(Values = Y/N)*

Table 1.

Screen Name
Abbreviation
Contact First Name
Contact Last Name
Title
Email
Phone
Fax

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

Vehicles

Table 2.

Screen Name
*Vehicle
Status
Registration No
VIN Number
Contractor
Capacity
Special Equipment
Model Year
Operating Cost
License Plate
Other ID
AM Driver Employee No
PM Driver Employee No

* indicates a required field for the import

> ***Note:*** *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

Employees

Table 3.

Screen Name
*First Name
*Last Name
*Employee ID
License #
Social Security
Employee Title
Employee Type
Address 1
Address 2
City
State
Zip
Phone
Cell Phone
Email
Hire date
Seniority Date
Weekly Employee Run Time
Distance Availability
Status *(Values = Y/N)*
Driver *(Values = Y/N)*
Monitor *(Values = Y/N)*
Aide *(Values = Y/N)*
Multi-Day Trips *(Values = Y/N)*
Notes

Table 3.

Screen Name
Non-Transportation Employee *(Values = Y/N defaults to Y if not specified)*
Birth Date
Appear in Driver Queue

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

Trip Locations

Table 4.

Screen Name
*Location Name
Status *(Values = Y/N)*
**Location Type
Address 1:
Address 2:
City
State
Zip
Country
Contact Name
Phone
Directions

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

Accounts

Screen Name
*Name
Building Name
Budget Number
Address1
Addres 2
City
State
Zip
Budget Threshold
Charge Basis
Approval Path
Account Instructions
Status

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

Account Contacts/Requesters/Drivers

Screen Name
*Account Name
Employee Number
**Is Contact
**Is Requester
**Is Driver

** Indicates a required field for the import*

*** At least one of these fields needs to be "Y" for an import to take place*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

Pick Lists

Table 5.

Screen Name
*Pick List Name
*Employee ID

** Indicates a required field for the import*

Importing Items Using a Delimited Format

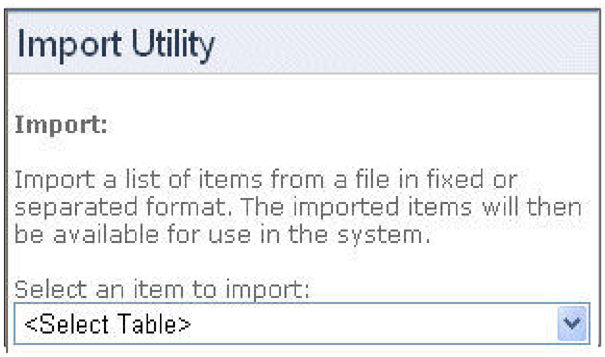
The procedure is the same for importing **Buildings**, **Vehicles**, **Employees**, **Locations**, **Accounts** or **Account Contacts/Requesters/Drivers** from the drop-down list. We will be importing vehicles for our example.

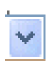
In order to import items using a delimited format, you must first create a delimited file See, *Creating the Delimited Files Used for Importing Buildings, Vehicles, Employees etc.* on page 309.

To import items using a delimited format:

Path:) **Admin > Import Utility**

1. Follow the above path to display the Import Utility screen.



2. Click  to display a list of items.

The procedure for importing is the same for all items. We will be importing **Employees** for our example.

The employee import allows an existing employee record to be updated. For example, you might import new drivers. At a later date, it has been determined that the seniority date for one or more of the imported drivers has changed. A new file containing the changes is imported resulting in updates to the existing driver records while the unchanged fields remain the same.

3. Select **Employees** to display the import options for employees as shown below.

Select **Delimited** for the type of import. For more information see, *Creating the Delimited Files Used for Importing Buildings, Vehicles, Employees etc.* on page 309

The checkbox **Allow clearing of blank fields** allows you to clear 'blank' fields for an updated employee record. For example, you might import new drivers. At a later date, it has been determined that there are one or more fields where the information is no longer relevant and you want to leave them blank. You select "Allow clearing of blank fields" in the Import Utility. A new file containing the blank fields is imported resulting in updates to the existing driver records while the unchanged fields remain the same.

4. Click and locate the delimited file that you want to import.
5. Specify the row number that the data in the file begins at (do not count the row that defines the fixed definitions). This defaults to one. Typically this value does not change.
6. Select the type of delimiter that was used for creating the file that is being imported Tab, Semicolon, Comma, or Other).
7. Click to start the importing process. You will be able to preview a sample of your file for accuracy.
8. Click to begin the import process. This will show you the first 10 rows of data in your import file.
9. If there are errors, you can correct the errors in the file that you are importing. When the errors have been corrected, select the file and perform the import again. When your import is successful, you will receive a message indicating how many employees were imported.

Creating the Delimited Files Used for Importing Buildings, Vehicles, Employees etc.

In order for Triptracker to know what values to populate into which fields in the database, you MUST include a header in your delimited file that defines the fields that you are importing. The system expects the field names to be defined as follows. The field names are not case-sensitive.

* *indicates a required field for the import*

Buildings

Table 6.

Screen Name	Delimited Field Name
*Name	Name
*Building Number	BuildingCode
Address 1	Address1
Address 2	Address2
City	City
State	State
Zip	PostalCode
Status	Active*(Values = Y/N)*
Abbreviation	Abbrev
Contact First Name	FirstName
Contact Last Name	LastName
Title	Title
Email	Email
Phone	PhoneNumber
Fax	Fax

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

Name,BuildingCode,Address1,Active,Abbrev
Elm Street Elementary,4590,12 Elm Street,Y,ESE

Vehicles

Table 7.

Screen Name	Delimited Field Name
*Vehicle	Vehicle
Status	Active *(Values = Y/N)*
Registration No	RegistrationNo
VIN Number	VIN
Contractor	Contractor
Capacity	Capacity
Special Equipment	SpecialEquipment
Model Year	ModelYear
Operating Cost	CostPerMile
License Plate	Plate1
Other ID	SerialNo
AM Driver Employee No	AMDriverID
PM Driver Employee No	PMDriverID

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

Vehicle,Active,Contractor,Capacity,ModelYear
3402,Y,My Yellow Bus,65,2004

Employees

Table 8.

Screen Name	Delimited Field Name
*First Name	FirstName
*Last Name	LastName
*Employee ID	EmployeeNo
License #	DrivLicense
Social Security	SSN
Employee Title	EmployeeTitleID
Employee Type	EmployeeTypeID
Address 1	Address 1
Address 2	Address 2
City	City
State	State
Zip	PostalCode
Phone	HomePhone
Cell Phone	CellPhone
Email	Email
Hire date	HireDate
Seniority Date	SeniorityDate
Weekly Employee Run Time	WeeklyEmployeeRunTime
Distance Availability	DistanceAvailability
Status	Active *(Values = Y/N)*
Driver	IsDriver *(Values = Y/N)*
Monitor	IsMonitor *(Values = Y/N)*
Aide	IsAide *(Values = Y/N)*
Multi-Day Trips	MultiDayTrips *(Values = Y/N)*
Notes	Notes

Table 8.

Screen Name	Delimited Field Name
Non-Transportation Employee	NonTransportationEmployee *(Values = Y/N defaults to Y if not specified)*
Birth Date	BirthDate
Appear in Driver Queue	AppearInDriverQueue
Active Directory Username	ActiveDirUsername

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

FirstName,LastName,EmployeeNo,HireDate,Active
Michael,Walton,8974,10/10/02,Y

Trip Locations

Table 9.

Screen Name	Delimited Field Name
*Location Name	LocationName
Status	Active *(Values = Y/N)*
Location Type	**LocationTypeID
Address1	Address1
Address2	Address2
City	City
State	StateProvince
Zip	PostalCode
Country	Country
Contact Name	ContactName
Phone	Phone
Directions	Directions

** indicates a required field for the import*

** 1=billing location; 2=origin only; 3=destination only; 4=origin or destination. If unspecified 3 is the default.

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

LocationName,Active,Address1,ContactName,Phone,Directions
Art Museum,Y,123 Main Street,Anne Arthur,555-1234,Take I-90 East to Exit 54 right turn off of ramp onto Main Street

Accounts

Table 10.

Screen Name	Delimited Field Name
*Name	Name
Building Name	Building
Budget Number	BudgetNumber
Address1	Address1
Addres 2	Address2
City	City
State	State
Zip	PostalCode
Budget Threshold	BuidgetThreshold
Charge Basis	DefaultChargeBasis
Approval Path	ApprovalPath
Account Instructions	AccountInstructions
Status	Active *(Values = Y/N)*

** Indicates a required field for the import*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

Name,Active,Building,BudgetNumber,Address1,Address2
City,State,PostalCode,BudgetThreshold,DefaultChargeBasis,ApprovalPath,AccountInstructions
Account1,Y,BuildingName,123,111 Main St,PO
Box111,Anytown,NY,12111,999.50,ChargeBasis,ApprovalPath,Instructions

Account Contacts/Requesters/Drivers

Table 11.

Screen Name	Delimited Field Name
*Account Name	TransportationAccount
Employee Number	EmployeeNumber
**Is Contact	IsContact*(Values = Y/N)*
**Is Requester	IsRequester *(Values = Y/N)*
**Is Driver	IsDriver *(Values = Y/N)*

** Indicates a required field for the import*

*** At least one of these fields needs to be "Y" for an import to take place*

Note: *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

TransportationAccount,EmployeeNumber,IsContact,IsRequester,IsDriver

Account1,1,N,N,Y
Account1,2,N,Y,N
Account1,3,Y,Y,N

Note: *The Employee number and Account must exist (previous import etc.) before you can import Account Contacts/Requesters/Drivers.*

Pick Lists

Table 12.

Screen Name	Delimited Field Name
*Pick List Name	PickList
*Employee ID	EmployeeNo

** Indicates a required field for the import*

A sample delimited file might look like this:

PickList,EmployeeNo

Drivers1,4

Drivers,2

Drivers,3

Drivers1,400000

Drivers1,20

Note: *A Pick List and Employee number must exist before you can import Pick Lists.*

Employee Pay Rate

Table 13.

Screen Name	Delimited Field Name
*Employee ID	EmployeeNo
*Job Category	JobCategory
Hourly Rate	HourlyRate
Overnight Rate	OvernightRate
Sit Rate	SitRate
Weekend Rate	WeekendRate
Is Delete	IsDelete (Values = Y/N)

** Indicates a required field for the import*

Employee and Job Category mus exist

Is Delete
If a user enters a 'N' then the job category is updated or added if it doesn't exists within the employee record.

If a user enters a 'Y' then the job category is deleted from the employee record.

A sample delimited file might look like this:

EmployeeNo,JobCategory,HourlyRate,OvernightRate,SitRate,WeekendRate,IsDelete

User

Table 14.

Screen Name	Delimited Field Name
*User Name	UserName
Employee ID	EmployeeNo
*User Password	UserPassword
*User Group	UserGroup
Status	Status
Weekend Rate	WeekendRate
Access to All Accounts	AccesstoAllAccounts

** Indicates a required field for the import*

User Group is required

Employee ID must be valid but is not required

User Password must be valid based on the VersaTrans Triptracker Configuration settings.

A sample delimited file might look like this:

UserName,EmployeeNo,UserPassword,Usergroup,Status,AccesstoAllAccounts

User Accounts

Table 15.

Screen Name	Delimited Field Name
*User Name	UserName
*Account	Account
Is Delete	IsDelete (Values = Y/N)

** Indicates a required field for the import*

User Group is required

Employee ID must be valid but is not required

User Password must be valid based on the VersaTrans Triptracker Configuration settings.

A sample delimited file might look like this:

UserName,EmployeeNo,UserPassword,Usergroup,Status,AccesstoAllAccounts

Importing Trips

Users having Trip: Import or Administrator: Super User permissions can import trips into Triptracker and enter multiple trips at the same time. When Importing trips, you can specify whether the trips are pre-approved or requested awaiting approval. For our Enterprise ERP Integrated clients, trips will only be imported to a “requested” status due to the need to verify funds. The files can be tab, semicolon, comma, .txt, .csv, .asc, in delimited format.

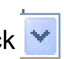
Importing Trips Using a Delimited Format

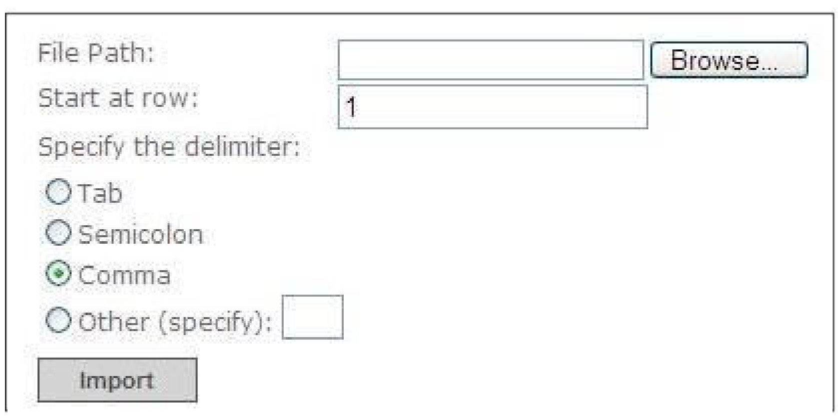
In order to import items using a delimited format, you must first create a delimited file. See, *Creating the Delimited Files Used for Importing Trips* on page 323.

To import Items using a delimited format:

Path:) **Admin > Import Utility**

1. Follow the above path to display the Import Utility screen.

2. Click  to display, **Accounts**, **Account Contacts/Requesters/Drivers, Buildings**, **Employees, Locations, Pick List, Trips and Vehicles** in the drop-down list.
3. Select **Trips** to display the following panel.



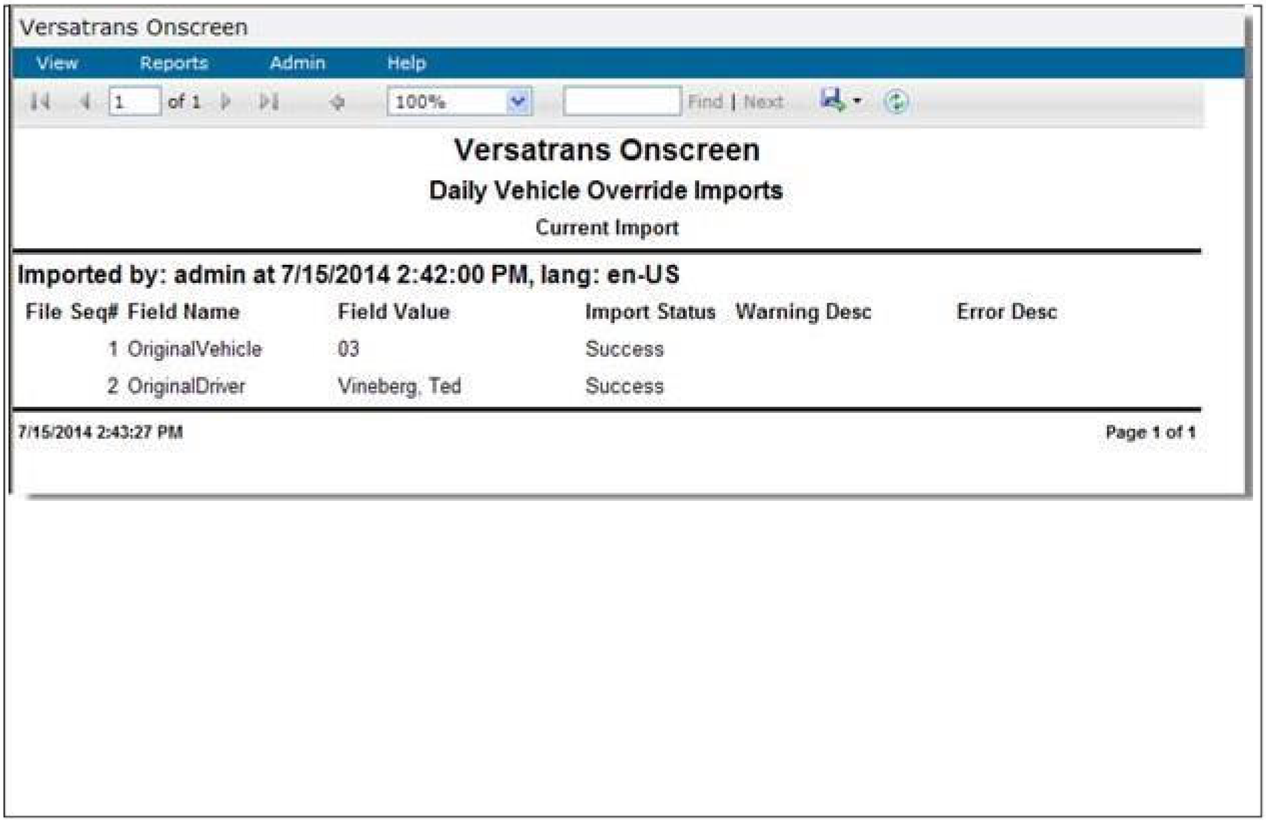
4. Click and locate the delimited file that you want to import.

5. Specify the row number that the data in the file begins with. This defaults to one. Typically this value does not change.

6. Select the type of delimiter that was used for creating the file that is being imported Tab, Semicolon, Comma, or Other (txt, .csv, .asc, or .tab).

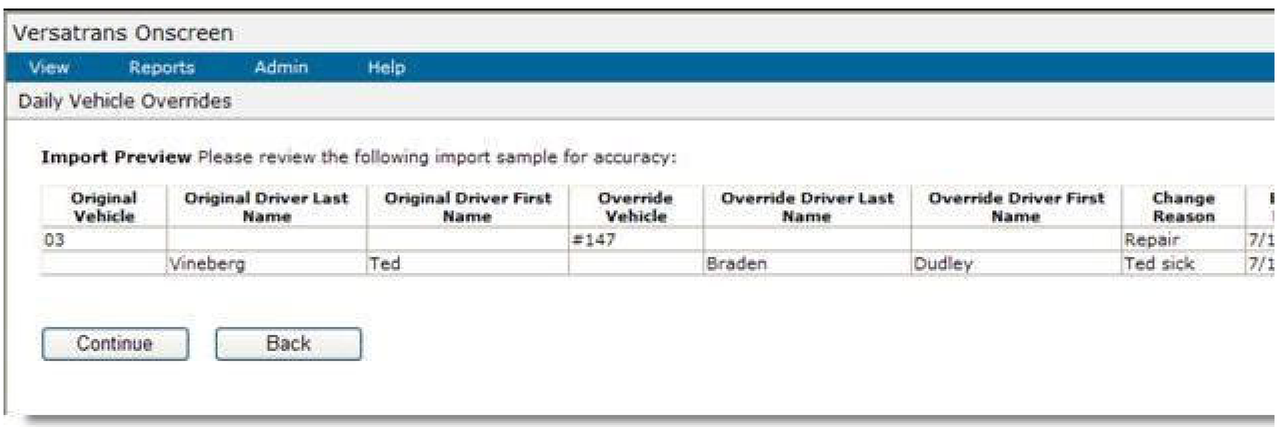
7. Click 

to start the importing process. You will be able to preview a sample of your file for accuracy.



8. Click to begin the import process.

9. Click **View Import Log**.



10. The Trip Import Log report allows you to view a report of all trips from the import file, errors encountered and whether the trips were imported. If there are errors, you can correct the errors in the file that you are importing. When the errors have been corrected, select the file and perform the import again.

Creating the Delimited Files Used for Importing Trips

In order for Triptracker to know what values to populate into which fields in the database, you MUST include a header in your delimited file that defines the fields that you are importing. The system expects the field names to be defined as follows. The field names are not case-sensitive.

* *indicates a required field for the import*

Trips

Table 16.

Screen Name	Delimited Field Name	Processing
*Trip Name	TripName	If the trip name is longer than 30 characters, the trip name will be truncated to 30 characters and a warning message will be written to the Trip Import Log. If the trip name is not found in the import file, the trip will not be imported and an error will be written to the Trip Import Log.
*Trip Date	TripDate	If the trip date is not valid, the trip will not be imported an error will be written to the Trip Import Log.
Status	TripApproved	The import values used 'Y' or 'N'. When 'N' is used the trip's status will be set to 'Requested'. When 'Y' is used the trip's status will be set to 'Approved'. In the following special cases: If Enterprise ERP is integrated, the status will be 'Requested' regardless of what value is used in the import. If the trip's account does not have an approved path, the status will be 'Approved' regardless of what value is being used in the import.

Table 16.

Screen Name	Delimited Field Name	Processing
Trip Type	TripType	If this is not a valid active Trip Type, the Trip Type will not be saved and a warning will be logged in the Import Log.
Activity Type	ActivityType	If this is not a valid active Activity Type, the Activity Type will not be saved and a warning will be logged in the Import Log.
Reason For Trip	ReasonForTrip	If the reason for the trip is longer than 80 characters a warning message will be written to the Trip Import Log and the description will be truncated to 80 characters.
*Account	AccountName	If the account name is not valid, the trip will not be imported and an error will be written to the Trip Import Log.
*Requester	RequesterID	If RequesterID does not exist: The system will validate the requester Last Name and First Name (see below).

Table 16.

Screen Name	Delimited Field Name	Processing
Requester Last Name	Requester LastName	If the Requester is not included, the system will check the Employee's table for an active match on the Last Name and the First Name. If one (1) match is found, the Requester is inserted into the trip's requester field. If more than one (1) match is found: The system will verify if one of the employee's is a requester on the trip's account and if so, then this employee will be used to populate the trip's requester field. If more than one (1) match is found and none of them are a requester on the trip's account, an error is written to the Trip Import Log.
Requester First Name	Requester FirstName	
*Origin	Origin	The system verifies that the Origin is the active location:
*Origin Departure Date	Origin DepartureDate	If the Origin's Departure Date is not valid, the trip will not be imported and an error will be written to the Import Log.
*Origin Departure Time	Origin DepartureTime	If the Origin's Departure Time is not valid, the trip will not be imported and an error will be written to the Import Log.
*Origin Return Date	Origin ReturnDate	If the Origin's Return Date is not valid, the trip will not be imported and an error will be written to the Import Log.

Table 16.

Screen Name	Delimited Field Name	Processing
*Origin Return Time	Origin ReturnTime	If the Origin’s Return Time is not valid, the trip will not be imported and an error will be written to the Import Log.
*Destination	Destination1	The system will verify that the Destination is an active location:
*Destination Arrival Date	Destination1DepartureDate	If the Destination Arrival Date is not valid, the trip will not be imported and an error will be written to the Import Log.
*Destination Arrival Time	Destination1DepartureTime	If the Destination Arrival Time is not valid, the trip will not be imported and an error will be written to the Import Log.
*Destination Departure Date	Destination1ReturnDate	If the Destination Departure Date is not valid, the trip will not be imported and an error will be written to the Import Log.
*Destination Departure Time	Destination1ReturnTime	If the Destination Return Time is not valid, the trip will not be imported and an error will be written to the Import Log.
Destination	Destination2	The system will verify that the Destination is an active location:
Destination Arrival Date	Destination2DepartureDate	If the Destination Arrival Date is not valid, the trip will not be imported and an error will be written to the Import Log.
Destination Arrival Time	Destination2DepartureTime	If the Destination Arrival Time is not valid, the trip will not be imported and an error will be written to the Import Log.
Destination Departure Date	Destination2ReturnDate	If the Destination Departure Date is not valid, the trip will not be imported and an error will be written to the Import Log.

Table 16.

Screen Name	Delimited Field Name	Processing
Destination Departure Time	Destination2ReturnTime	If the Destination Departure Time is not valid, the trip will not be imported and an error will be written to the Import Log.
Adults	NoOfAdults	The number of adults will default to 0
Students	NoOfStudents	Number of Students
Wheelchairs	NoOfWheelchairs	Number of Wheelchairs
Vehicles	NoOfVehiclesRequested	Number of Vehicles Requested
Special Accommodations	SpecialAccommodations	The import values used should be 'Y' or 'N'. When 'Y' is used the trip's Special Accommodations will display 'Yes' and the edit screen checkbox will be marked with a check. If 'N' is used the trip's Special Accommodations will display 'No' and the edit screen checkbox will not be marked with a check. If the import does not include a value for Special Accommo-dation then it will default to 'No' and be unchecked.
Contact Name	ContactName	If the Contact Name is longer than 50 characters, a warning will be written to the Trip Import Log and the Contact Name will be truncated to 50 characters.
Contact Phone	Contact Phone	If the Contact Phone is longer than 25 characters a warning message will be written to the Import Log and the Contact Phone will be truncated to 25 characters.

Notes Notes

Distance Distance

Table 16.

Screen Name	Delimited Field Name	Processing
Overnight Hours	OvernightHours	
Tolls	Tolls	
Parking	Parking	
Hotel	Hotel	
Meals	Meals	
Misc Charges	MiscCharges	

> ***Note:*** *You do not need to import values for each of these fields. Triptracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

TripName, TripDate, TripApproved, TripType, ActivityType, ReasonForTrip, AccountName, RequesterID, RequesterLastName, RequesterFirstName, Origin, OriginDepartureDate, OriginDepartureTime, OriginReturnDate, OriginReturnTime, Destination1, Destination1DepartureDate, Destination1DepartureTime, Destination1ReturnDate, Destination1ReturnTime, Destination2, Destination2DepartureDate, Destination2DepartureTime, Destination2ReturnDate, Destination2ReturnTime, NoOfAdults, NoOfStudents, NoOfWheelchairs, NoOfVehiclesRequested, SpecialAccomodations, ContactName, ContactPhone, Notes, Distance, OvernightHours, Tolls, Parking, Hotel, Meals, MiscCharges

Batch Creation of Users

Batch User Creation allows you to quickly generate user accounts for a large number of employees. The Batch User Creation process enables you to filter on a specified set of employees and then select the appropriate account(s) to which those employees should be assigned.

Because you may not always be able to use the Employee filter criteria to get the exact list of employees that you want to be part of the same User Group, there is a recommended work flow to help facilitate the creation of Users and their assignment to specific User Groups.

This section will walk you through importing a list of employees with similar characteristics by assigning them all the same Employee Type. From there, on the Batch User Creation page you can filter for this specific Employee Type and then assign all of those employees to the same User Group and Accounts.

The steps that need to be taken for the Batch Creation of Users include:

1. Add Accounts, See, *Adding Account Records* on page 157.
2. Setup the “specific” Employee Type that you want to associate the designated employees with. This will allow you to import employees using the specified employee type (step 4) and filter on the employee type that the imported employees belong to (step 5). See, *Adding an Employee Type and Associating Certifications* on page 58.
3. Add User Groups. See, *Adding a User Group and Assigning Privileges* on page 265.
4. Import Employees using the specified Employee Type. Setup your employee import so that employees that will be Users have the specific employee type that matches the employee type that you created in step 2. See, *Importing Buildings, Vehicles, Employees, etc.* on page 294.
5. Filter on the Employee Type that the imported Employees (step 4) belong to. Once you have your list of employees, select the username and password format along with the User Group and Account(s) which these users should have access to. See, *Batch Assigning Employees to a User Group & Accounts* on page 330.

Batch Assigning Employees to a User Group & Accounts

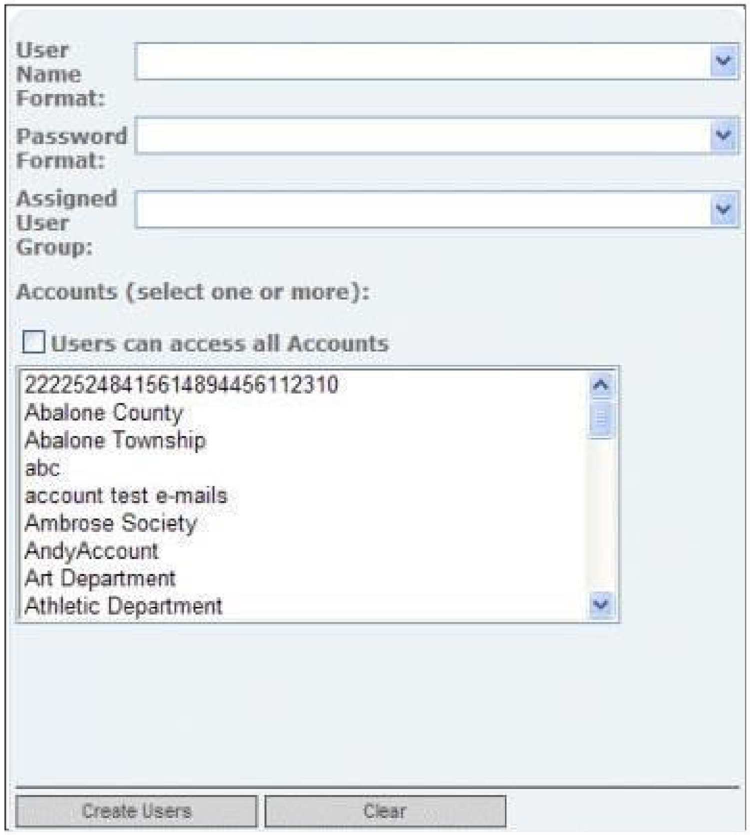
To batch assign employees to a user group & accounts:

Path:) Admin > Batch User Creation

1. Follow the above path to display the Batch User Creation page. This page consist of two panels. The panel on the left allows you to perform an employee search. The panel on the right allows you to select import options.
2. You start by performing either a basic or advanced search to find the employee records that you want to batch assign.

For information on how to use the basic and advanced search, see *Finding & Editing an Employee's Record* on page 83. Once the search is performed, the results must be used in their entirety and individual employees cannot be selected.

Once you have finished selecting employees for batch user creation, you will select import options in the “Select Import Options” panel on the right side of the page.



3. Select a User Name Format and Password Format.

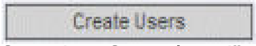
   If you use select the “Generate Random Password” option for the password format, the passwords generated will adhere to the “Min special characters in password” and “Min characters in password” settings as specified in the Triptracker Configuration Utility via the Login tab.

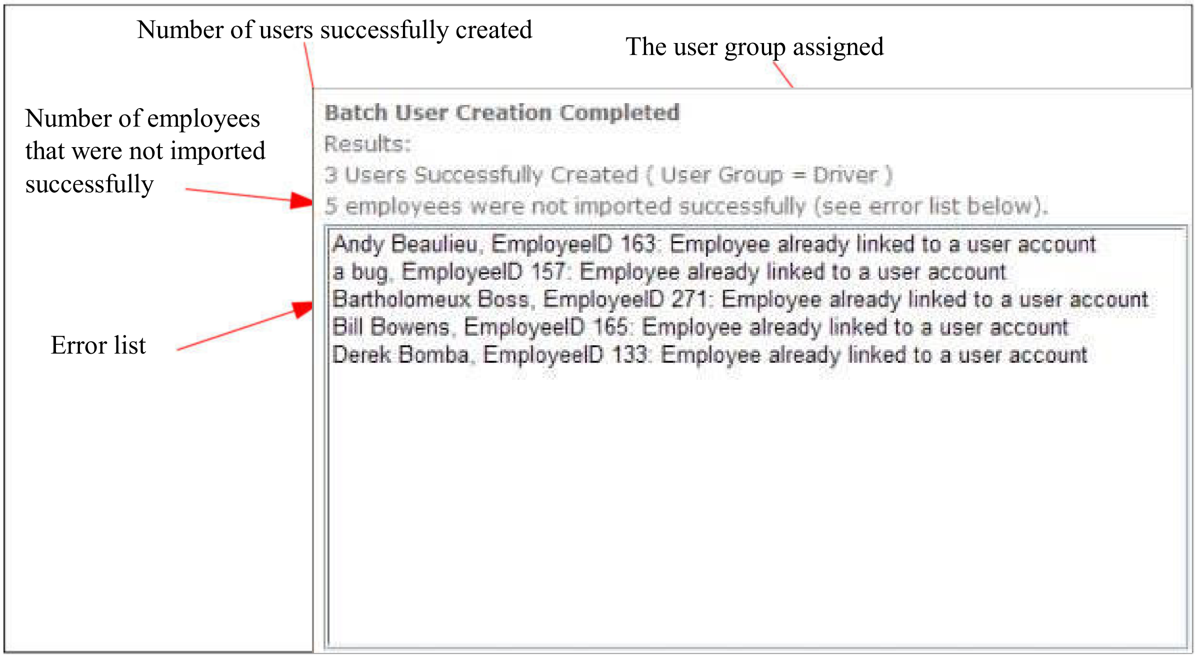
   If you use the “User ID” option only employees with User ID’s that adhere to the “Min special characters in password” and “Min characters in password” will be assigned to User Groups and Accounts.

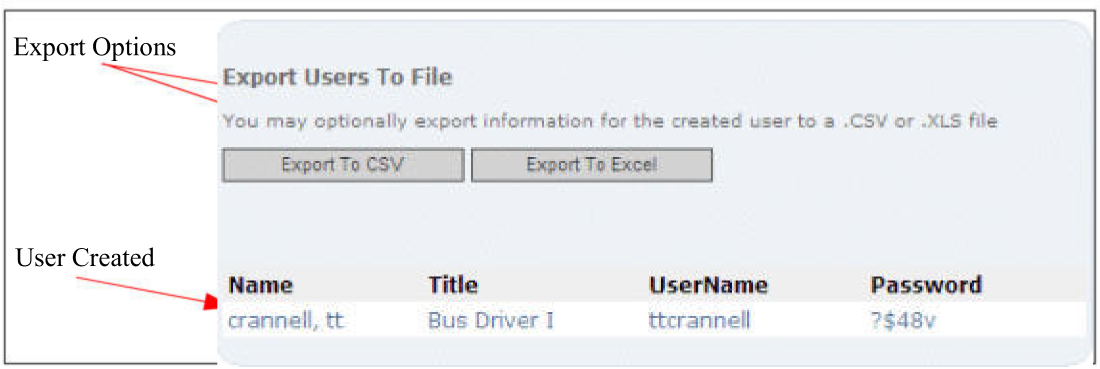
4. Select the User Group that you want the employee(s) assigned to.

5. To select a specific account, click on that account. Use the Ctrl and Shift keys to select multiple accounts.

6. Check the “Users can access all accounts” box to select all the accounts.

7. Click  to assign the employees to a user group & accounts. The “Batch User Creation Completed” screen displays containing the batch creation results and export options as shown below.





8. You can export the information for the user(s) that were created as a CSV or Excel file. If you want to export this information, click  or  and then click

Note: *You also have the option of opening the CSV file in an Excel spreadsheet.*

9. Select the location where you want to export the file and enter a name for the file.

10. Click .

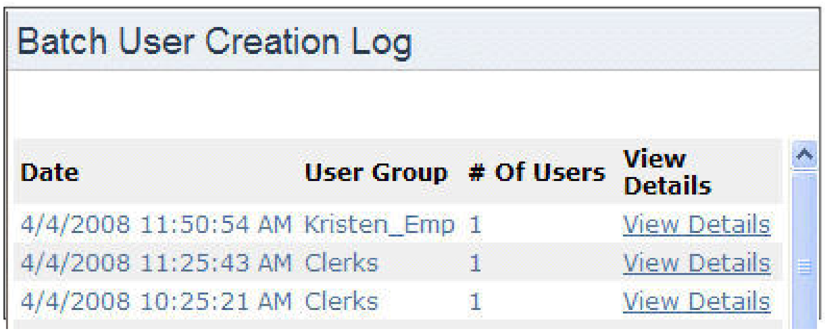
Using the Batch User Creation Log

The "Batch User Creation Log" allows you to display a chronological list of users that were successfully created. You can then make a selection from the list and view the details (Name, Title, UserName and Password) of those users.

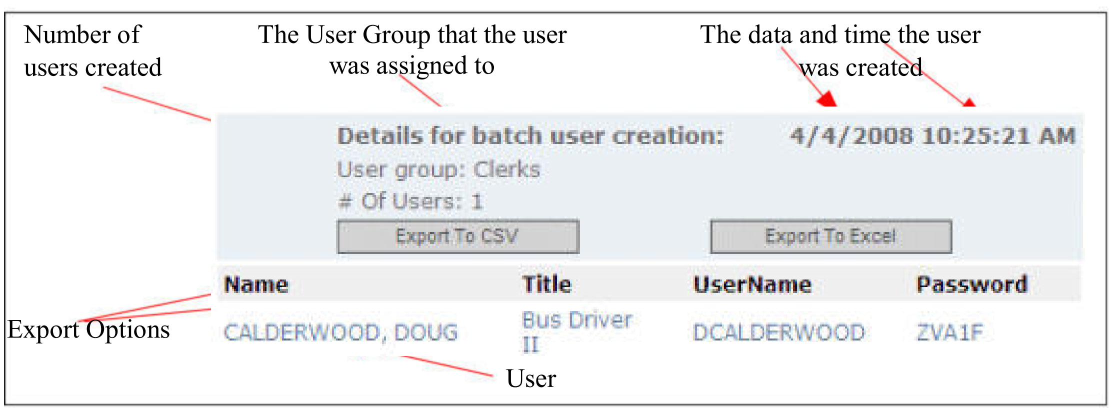
To use the batch user creation log:

Path:) Admin > Batch User Creation

1. Follow the above path to display the Batch User Creation page.
2. Click Batch User Log to display the Batch User Creation Log. This log provides a chronological list of successfully created users.
3. Make a selection from the list and click . to view associated User information.



View Details



4. You can export the information for the user(s) that were created as a CSV or Excel file. If you want to export this information, click Export To CSV or Export To Excel and then click Save

   Note: *You also have the option of opening the CSV file in an Excel spreadsheet.*

5. Select the location where you want to export the file and enter a name for the file.

6. Click 

.

A p p e n d i x C

Conversion & Integration

Topics In This Chapter:

Converting Triptracker 1.2 Data

After you install the Triptracker upgrade and attach the blank database (see the guides for *Installing Tyler's Triptracker* and *Loading Tyler's Triptracker Databases*), you are ready to think about your data. If you are a current Triptracker 1.2 user, you can convert your existing data to the Triptracker format, which saves a lot of work.

Note: *ONLY Version 1.2 users and later can convert their data using this utility. Users with older versions must upgrade before importing and users who have non-Versatrans field trip tracking data cannot use this conversion utility at all.*

Overview of the Conversion Process

The conversion program takes your current data, converts it into a different format and imports it into the new database you have attached to Triptracker. How long the conversion takes depends upon the amount of information you have to convert. Original Version 1.2 data will remain available and unchanged because we use a copy of the data in creating the conversion. However, we highly recommend that you back up your data prior to the conversion.

Note: *It is required that you run the Triptracker conversion utility from a workstation that currently has Version 1.2 installed.*

What Is Involved In Converting My Data

You will need to perform the following procedures to convert your data:

1. Install Triptracker as described in *Tyler's Versatrans Triptracker Installation Guide* included on your Triptracker CD.
2. Connect to the empty database using the ToolMS, (See, *Loading the Versatrans Triptracker Sample & Blank Databases* included on your Triptracker CD).
3. Review your Triptracker 1.2 data to make it as complete as possible.
4. As a precaution, backup your Triptracker 1.2 data and place it in a separate directory.
5. If you have archived data that you want to convert, we recommend that you restore it after you backup your current data.
6. Open the Triptracker Conversion Utility and select the database you want to convert.
7. Specify the conversion options and convert your data.
8. Connect to the new database.

Preparing Your Version 1.2 Data

Before you convert your data, it makes sense to clean it up and remove any old information that you do not need in the new system.

- Delete any unneeded Accounts, Employees, Trips etc. keeping only those necessary to move ahead.

  Remember, the fewer the records, the faster and better the conversion. The more complete the records, the better report options you have.
- Review the Fiscal Period date ranges in version 1.2 and make sure there are no overlapping date ranges. This is important because those date ranges are what determines how trip charges are reported by Fiscal Period in version 9.9.
- Review your current trips. Note that any trips that are in a “scheduled” status, but do not have a driver associated with them will be converted to a trip with an “approved” status in the new version since it is required to have a driver associated with a scheduled trip.

Once you have pared down your data, “***back it up”***. While the conversion shouldn’t affect your current Triptracker 1.2 data files, it is a good idea to have a current back up before you begin.

What Information Cannot Be Converted

The following information cannot be converted:

- Custom Holidays
- Driver Pick Lists
- Message Templates
- Tip of the Day
- Option Settings
- Reports
- User Groups
- Users

Converting Your Data

Before we begin, we assume that you have already completed the Triptracker installation and have attached to the empty database, see, *Tyler’s Versatrans Triptracker Installation Guide* included on your Triptracker CD. You must complete this entire process, including connecting to the blank database, to be ready to perform the conversion.

Further, we expect that you have cleaned up your data and backed it up one last time before beginning the conversion process.

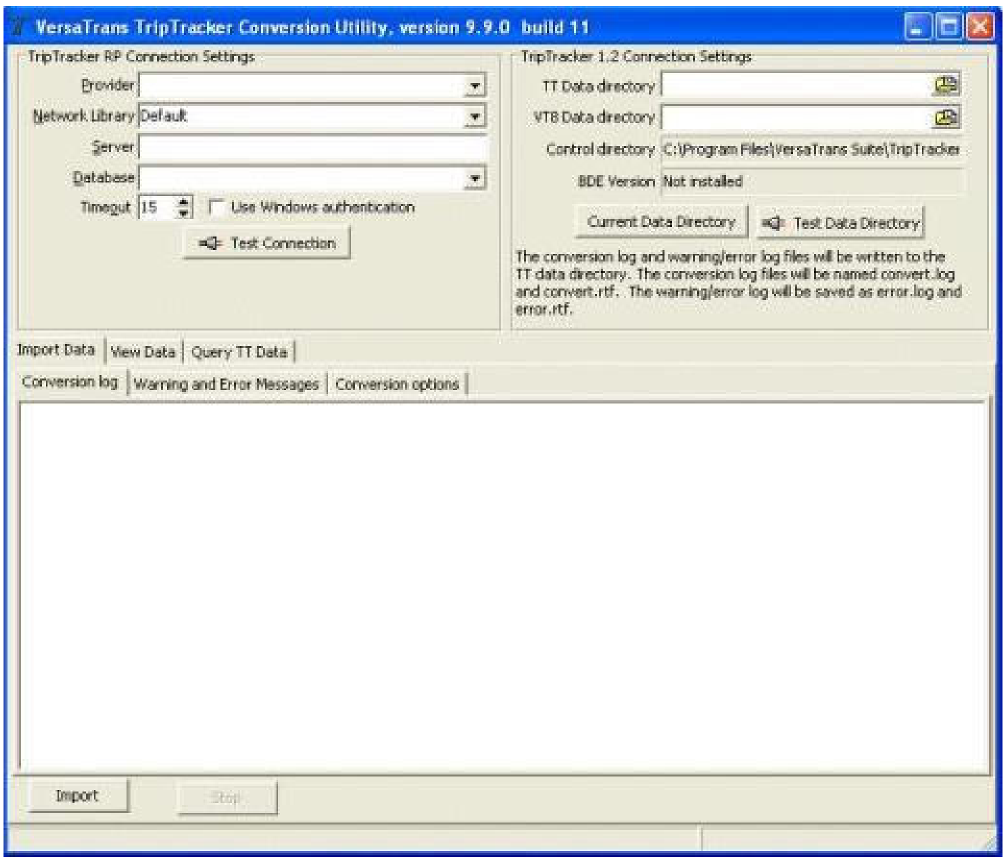
Additional considerations:

- Installation does not check for drive space please make sure you have adequate drive space.
- Make sure all users are out of Triptracker 1.2 and no one else is running Triptracker.

Converting Your 1.2 Data to Triptracker

To convert your 1.2 data to Triptracker:

Path:) Start > Programs > Versatrans Suite > Triptracker > Triptracker Conversion Utility



1. In the TT Data Directory field, click the button to display the list of directories on your local computer. Select the TT 1.2 data file path. If you do not know the data path, you can check by looking in your TT 1.2 options screen.

2. In the VT8 Data Directory field, click the button to display the list of directories on your local computer. Select the TT 1.2 data file path. If you do not know the data path, you can check by looking in your TT 1.2 options screen.

3. Click the Current Data Directory button to select the same data directory indicated in your TT 1.2 options.

4. Select the new database's settings in the Triptracker Connection Settings box.

   Provider
   Select the *Microsoft OLE DB Provider for SQL Server* from the Provider field.

   Network Library
   Select the network protocol you use to communicate to your database. Most users use *TCP/IP*.

   Server
   If you are connecting to the database over a network, type the name of the server you are using in this field. If your database is on your computer's hard drive, type (local) in this field. Make sure you enter the parentheses **( )** as well.

   Database
   Select the database from the drop-down list.

   Time Out
   This is the number of seconds you will allow the system to execute the import commands. If the import commands take longer than this, the system will end the command. We recommend that you leave the default entry as it is.

   Use windows authentication
   This option allows you to make your server more secure by only allowing specific windows logins to the server. When this checkbox is checked, Versatrans attempts logging into the database server using the user's Windows NT authentication credentials.

5. Click the Import Data tab, and then click the Conversion options tab to display available conversion options:

   - Display Triptracker 1.2 record ID values during import
   - Delete Triptracker tables before importing
   - Display information about skipped records
   - Run the Pdxbld check and repair utility before importing - before you convert your 1.2 data to Triptracker, you should run the Pdxbld utility to check and repair the Triptracker 1.2 tables.

You are now ready to run Triptracker and connect to the new database.

Post Conversion Checklist

- Review the Warnings or Error Messages tab..
- Remember that your security settings could not be converted and you must recreate those settings.
- For a Triptracker standalone installation, you need to run the Triptracker Configuration Utility. See, *Tyler's Versatrans Triptracker Configuration Utility* in the Online Help.

Routing & Planning/Triptracker and Fleetvision Integration

Note: *You must have Routing & Planning in order for Triptracker data to be integrated with Fleetvision. If you only have Triptracker and Versatrans Fleetvison, integrating between these two products is not supported.*

In order to initiate the integration between Routing & Planning/Triptracker, and Fleetvision, a one time integration matching process must be run. This process must be run when upgrading to Version 9.9 for existing users or when Routing & Planning/Triptracker, or Fleetvision has been purchased after having been populated with data.

Routing & Planning/Triptracker allows for integration with Fleetvision eliminating duplicate data entry in the following areas:

- Certifications
- Employees
- Vehicles

Anytime an add/change/delete action occurs on a record in Routing & Planning/Triptracker, the record in Fleetvision reflects the change immediately and vice versa.

Note: *If a record is open in both applications, the record will be editable to the user that opens the record first, any user that opens the record after the first user will receive a warning message and see the record as "read only."*

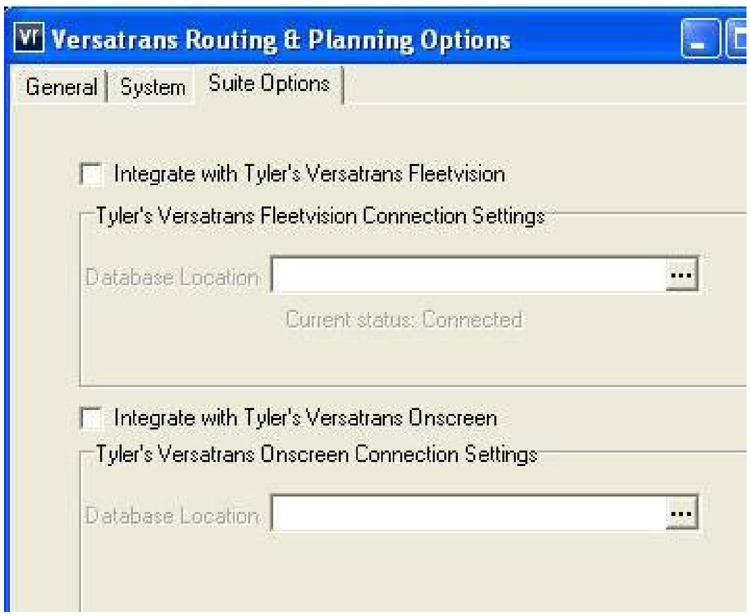
The following topics are covered in this section:

Setting Up the Database Connections

To integrate Routing & Planning/Triptracker with Fleetvision within the Routing & Planning application, go to:

Path: Tools > Options > Versatrans Options

1. Follow the above path to display the Versatrans Options dialog.
2. Click the Suite Options tab to display the Versatrans Options Integration dialog.



3. Click the **Integrate with Fleetvision** checkbox. When this checkbox is checked, the Fleetvision Connections Setting window is enabled.
4. Click **...** to display the Database Connection Wizard.

Note: *Since this is a system wide option, any other users logging into the Routing & PlanningTriptracker databases will be connected to the same Fleetvision database. Therefore, this setting can only be changed in single-user mode. If there is more than 1 user connected to the Versatrans database, a warning dialog displays and you should not change the settings.*

This dialog allows you to specify the Fleetvision database connection information. Complete the selections and entries that are appropriate to your system.

Provider
Select Microsoft OLE DB Provider for SQL Server unless instructed by Versatrans Solutions support staff otherwise.

Network Library
Select TCP/IP from this drop down unless instructed by Versatrans Solutions support staff otherwise.

Server
Type (local) in this field.

Database
Select the database you attached to from this list.

Timeout
Leave this entry as it is. The amount of time the system will spend trying to connect to the database. If you type 30 in this field, Versatrans will try for 30 seconds before timing out of the database.

5. When these entries and selections are complete, click **Save**. Saving these change applies the connection settings to the Fleetvision database.

   Once the database is connected, a green label (Current Status: Connected) indicates that the connection to Fleetvision has been successful.

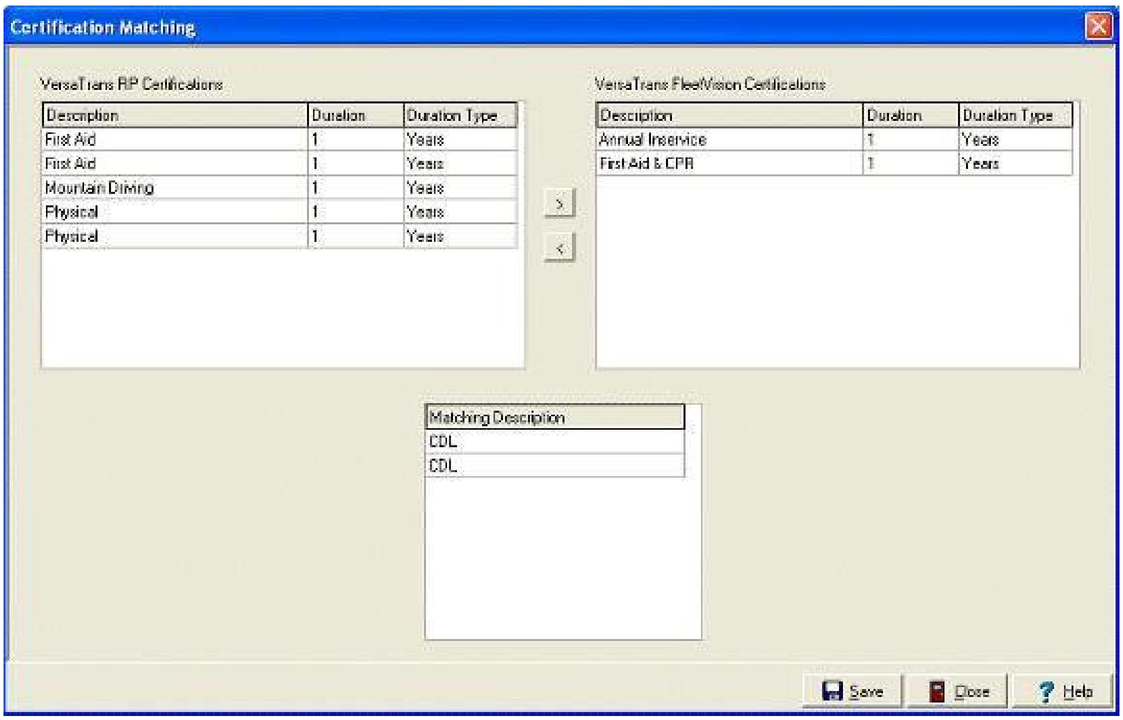
Matching Certification Records

Allows you to associate similar certifications in Routing & Planning/Triptracker with similar certifications in Fleetvision based on the certification description from the DESCRIPTION field.

To match certification records within the Routing & Planning application, go to:

Path: Tools > Integration > Match Certifications

1. Follow the above path to display the Certification Matching dialog.



Certifications between Routing & Planning/Triptracker, and Fleetvision are matched using the certification description in the DESCRIPTION field.

The upper section of the Certification Matching dialog contains two lists displaying the available certifications for Matching Routing & Planning/Triptracker Certifications and Fleetvision Certifications. The lower section of the dialog contains a Matched Certification list that automatically displays the certifications that currently match. When you manually match and save certifications, this list will also display those certifications.

The certification description in the DESCRIPTION field is the unique identifier between Routing & Planning/Triptracker and Routing & Planning certifications and Fleetvision certifications. The certifications are matched when the descriptions match.

1. You can click on a field name to sort by that name. For example, you can click on the DESCRIPTION field to alphabetically sort the certification descriptions.

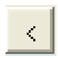
2. Click on a description in the left or right list and edit the description so that it matches the corresponding description in the opposite list. For example, click on certification description “First Aid & CPR” in the Fleetvision Certifications list and edit it to read “First Aid” to match the certification description in the Routing & Planning/Triptracker and Routing & Planning list.

3. Click 

and the matching certification is moved to the Matched Certification list.

   The certification description in the Certifications list in Fleetvision will automatically be changed from “First Aid & CPR” to “First Aid”. If the change had been made on the Routing & Planning/Triptracker certification description, the change would have automatically been made in the Triptracker/Routing & Planning Certifications list.

   Note: *You must click Refresh in the Certifications list to see the change.*

4. If a certification description exists in the Routing & Planning/Triptracker list but not in the Fleetvision list, you can click on the Routing & Planning/Triptracker description and then click 

to move it to the Fleetvision list or vice versa.

5. Click **SAVE** and the matching certification # is moved to the Matched Certification list.

6. Click the 

button when you are finished matching certifications.

Adding, Editing, and Deleting Certification Records

The table below describes the interaction between Routing & Planning/Triptracker and Fleetvision certification records.

Routing & Planning	**Fleetvision**
Add Certification record	The certification record appears when you refresh the Certification list.
Delete Certification record	There is no change in Fleetvision
Edit Certification duration	The certification duration change is reflected once you re-open the Certification record

Maintenance and Transmittal of Certification Records

Certifications are handled differently in Routing & Planning/Triptracker than they are in Fleetvision requiring that the maintenance of these records be limited to employees of record type “Driver”.

The following behavior takes place when transmitting certification updates in Routing & Planning/Triptracker to Fleetvision.

- The changes will be propagated only on Routing & Planning/Triptracker employee records with the Driver checkbox ON.
- When a certification is edited or added to an employee in Routing & Planning/Triptracker, the program checks for the existence of the same certification (based on description) in the Fleetvision employee record. If one exists, updates are made. If the certifications is not already applied to the employee, the program further checks to see if the certification record exists in Fleetvision (based on description). If such a certification is found, it is then applied to the employee.

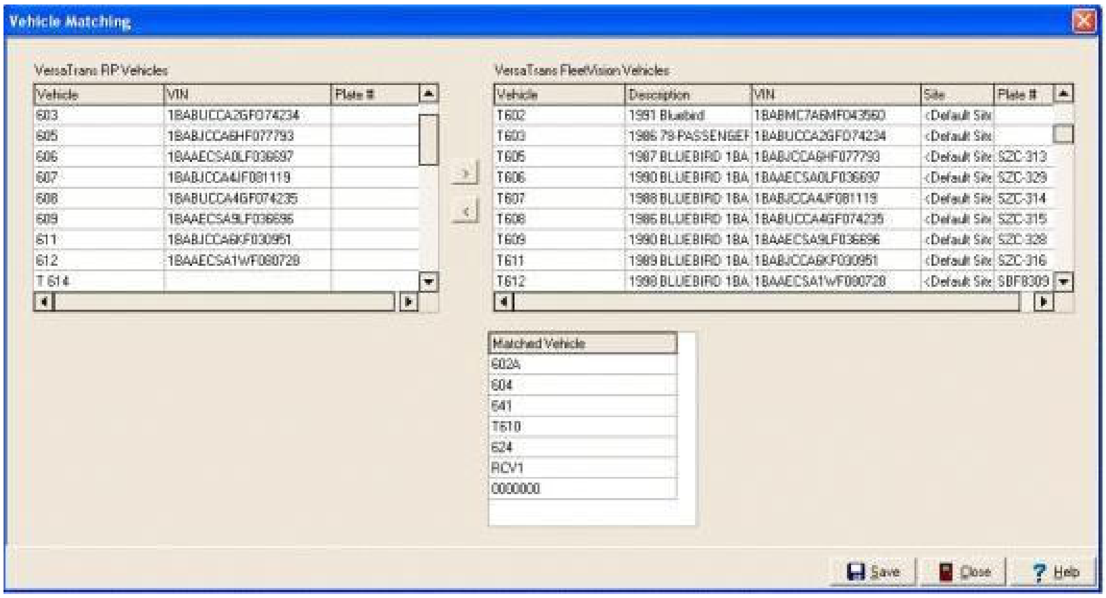
Matching Vehicle Records

Allows you to associate similar vehicles in Routing & Planning/Triptracker with similar vehicles in Fleetvision by Vehicle #.

To match vehicle records within the Routing & Planning application, go to:

Path: Tools > Integration > Match Vehicles

1. Follow the above path to display the Vehicle Matching dialog.



The upper section of the Vehicle Matching dialog contains two lists displaying the available vehicles for Matching Routing & Planning/Triptracker Vehicles and Fleetvision Vehicles. The lower section of the dialog contains a Matched Vehicle list that automatically displays the vehicles that currently match. When you manually match and save vehicles, this list will also display those vehicles.

The vehicle # (ie.603) in the **Vehicle** field is the unique identifier between Routing & Planning/Triptracker vehicles and Fleetvision vehicles. The vehicles are matched when the vehicle #'s match.

1. You can click on a field name to sort by that name. For example, you can click on the Vehicle field label to sort by vehicle order.

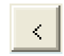
1. Click on a vehicle # in the left or right list and edit the vehicle # so that it matches the corresponding vehicle # in the opposite list. For example, click on vehicle # T603 in the Fleetvision Vehicles list and edit it to read 603 to match the vehicle # in the Routing & Planning list.

2. Click 

 and the matching vehicle # is moved to the Routing & Planning/Triptracker Matched Vehicle list.

The vehicle # in the Vehicles list in Fleetvision will automatically be changed from T603 to 603. If the change had been made on the Routing & Planning/Triptracker vehicle #, the change would have automatically been made in the Routing & Planning/Triptracker Vehicles list.

Note: *You must click Refresh in the Vehicles list to see the change.*

3. If a vehicle # exists in the Routing & Planning/Triptracker list but not in the Fleetvision list, you can click on the Fleetvision vehicle # and then click  to move it to the Routing & Planning/Triptracker list or vice versa.
4. Click and the matching vehicle # is moved to the Matched Vehicle list.
5. Click the button when you are finished matching vehicles.

Adding, Editing, and Deleting Vehicle Records

The table below describes the interaction between Routing & Planning/Triptracker and Fleetvision vehicle records.

Routing & Planning	**Fleetvision**
Add vehicle record	The vehicle record appears when you refresh the vehicle list
Delete vehicle record	The vehicle record is changed to “Inactive”
Edit vehicle record	The vehicle record changes are visible once the Routing & Planning/Triptracker user saves changes and the Fleetvision user refreshes the list

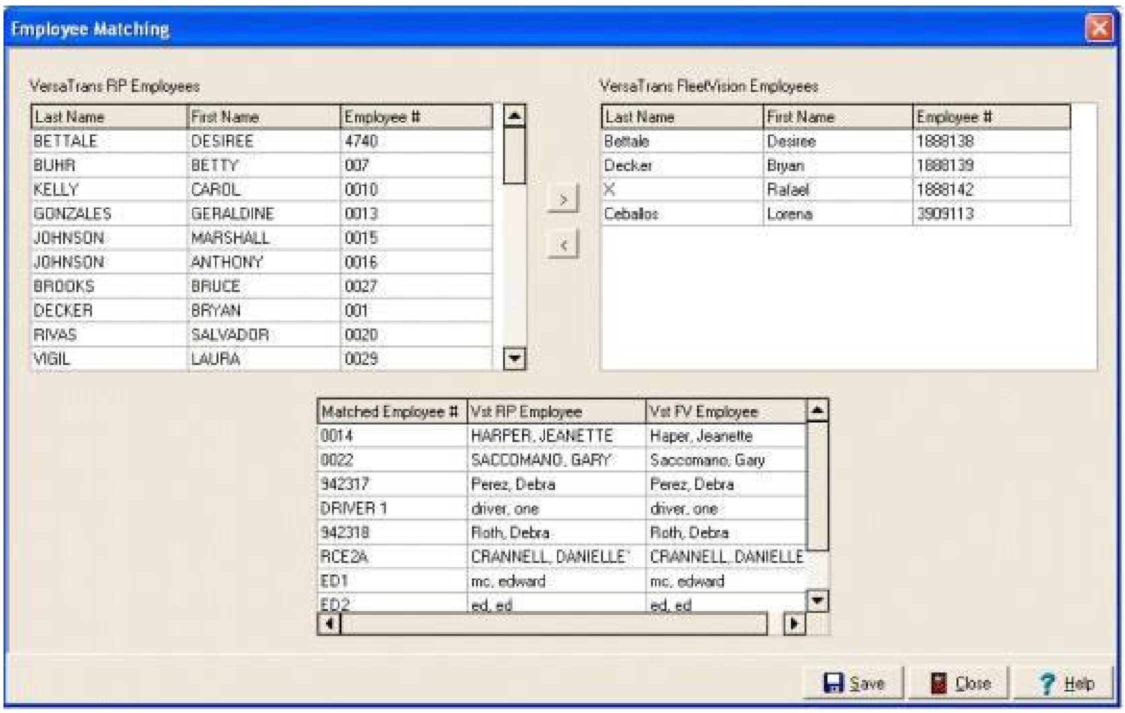
Matching Employee Records

Allows you to associate similar Routing & Planning/Triptracker employees and similar Fleetvision employees of type/classification “driver”.

To match employee records within the Routing & Planning application go to:

Path: Tools > Integration > Match Employees

1. Follow the above path to display the Employee Matching dialog.



The upper section of the Employee Matching dialog contains two lists displaying the available employees for Matching Routing & Planning/Triptracker Employees and Fleetvision Employees. The lower section of the dialog contains a Matched Employee list that automatically displays the employees that currently match. When you manually match and save employees, this list will also display those employees.

The employee **#** in the **Employee #** field is the unique identifier between Fleetvision employees and Routing & Planning/Triptracker employees. The employees are matched when the Employee #’s match.

1. You can click on a field name to sort by that name. For example, you can click on the Last Name field label to sort by alphabetical order.

2. Click on an employee # in the left or right list and edit the employee # so that it matches the corresponding employee # in the opposite list. For example, click on employee # 1888138 in the Fleetvision list and edit it to read 4740 to match the employee # in the Routing & Planning/Triptracker list.
3. Click 

and the matching employee # is moved to the Matched Employee list.

   The employee # in the Employee list in Fleetvision will automatically be changed from 1888138 to 4740. If the change had been made on the Routing & Planning/Triptracker employee #, the change would have automatically been made in the Routing & Planning/Triptracker Employees list.

   Note: *You must click Refresh in the Employee list to see the change.*

4. If an employee # exists in the Fleetvision list but not in the Routing & Planning/Triptracker list, you can click on the Fleetvision employee # and then click to move it to the Routing & Planning list or vice versa.
5. Click **Save** and the matching employee # is moved to the Matched Employee list.
6. Click the 

button when you are finished matching employees.

Adding, Editing, and Deleting Employee Records

The table below describes the interaction between Fleetvision and Routing & Planning/Triptracker employee records.

Routing & Planning	Fleetvision
Add employee record	Employee record appears when you refreshes employee list
Delete employee record	Employee record is marked "Inactive"
Edit employee record	The employee record changes are visible once the Routing & Planning/Triptracker user saves changes and the Fleetvision user refreshes the employee list

Glossary of Triptracker Terms

A

Account

The budget item you want to charge field trips against. For example, if your organization breaks the field trip budget down by school and then further by group, you might enter the name of the school and the group name in the Account field.

Active Check Box

When a check displays in an Active box, Triptracker considers the record active.

Advance notice for trip cancellation

Number of days in advance a trip must be cancelled. This can be over-ridden by a system administrator.

Advance notice for trip requests

Number of days in advance a trip must be scheduled. This can be over-ridden by a system administrator.

Approval Path

Defines the approvers and levels that a trip must go through to be approved for scheduling. An approval path can have multiple levels, and multiple approvers within a level.

Approver

The person(s) who can authorize a field trip.

Arrival Time

The time the bus should arrive at the destination.

B

Budget

Entire amount allocated for an account for a given fiscal period (usually a school year).

Budget Number

This is an internal code that your organization can use to track this transaction. This field is optional, so you do not have to complete it.

Budget Period

The fiscal period with its budgeted amount within the account record.

Budget Threshold
The account's monetary amount when a trip causes the budget period's remaining balance to be less than the defined amount. An email can be sent to the account's contact based on email options.

C

Capacity
The maximum number of people the vehicle can TransPort.

Charge Basis
The formula the system uses to calculate the trip cost. There can be many charge bases and one default basis.

Clone
Create a new trip by copying the trip request details from an existing trip.

Closed Date
The date the trip is closed.

Completed Date
Date on which the trip completion details are entered.

D

Date Approved
The date the current trip is (was) approved.

Default Charge Basis
You set the appropriate charge basis to act as the default for all trips entered into the system.

Destination
Describes the place the field trip is going to. The opposite of the origin.

Driver Assignment Rules
Flexible rules for defining how the next driver to be assigned a trip is selected.

E

Employee Type
Identifies the type of work an employee does. For example, you might have a driver type, an aide type, etc. You use these records to specify the organization required certification and training for a particular type of work.

Express Trip
Allows a user with the appropriate permissions the ability to request and approve a trip in a single function. Trip is immediately ready to schedule.

F

Fiscal Period
The term of your budget, usually for districts, the school year.

Fixed charges
Static set of charges defined on the Charge Basis that can be included on an invoice.

H

Hire Date
The date your organization hired this employee. The system may use this date for calculation purposes.

I

Inactive Check Box
When a check does not display in an Active box, Triptracker considers the record inactive.

Invoice
An itemized list of charges incurred for the trip, including Invoice Date, Invoice number, quantities, and prices.

J

Job category
Specific job function assigned to an employee defining pay rates to be used in creating the invoice.

L

Leave Time
The time the bus should leave the destination.

Location Type

Indicates which type of location you are entering.

Destination Only: If your field trips only go to this location as an end result (not as a starting point for the trip).

Origin Only: If your field trips only start from this location (as in a school or the bus garage location or terminal).

Look Ahead Days

How far ahead you want the program to notify you of approaching expiration dates. For example, if you want to know that a driver's certification is going to expire two weeks ahead of time, type **14** in this field.

O

Origin

This is the place the field trip starts. Most of the time, the trip origin is a school but it does not have to be.

P

Pick Lists

Lists that contain both drivers and monitors/aides. Versatrans Triptracker allows you to create and maintain multiple Pick Lists for both drivers and monitors/aides and have those Pick Lists available at the same time during scheduling.

R

Reactivate

Move a cancelled trip into the Approval process as an active trip request.

Refusal Date

The date a driver refused a trip. The system defaults to the current date but you can either type over this entry or you can click the down arrow and select the date from the calendar.

Resubmit

Move a rejected trip back into the approval process. See also "Trip Re-submission handling".

Requester

Person requesting a trip.

S

Seniority

If you want to list employees in a particular order based on seniority, enter the employee's number. See, *Adding an Employee Record* on page 72.

Seniority Date

If you want this employee to use a different date other than the date of hire for seniority purposes, selectan alternate date. See, *Adding an Employee Record* on page 72.

Sit Time

Time during the course of a trip where a driver is not driving a vehicle

Super user

A user account that can access and update any information in the Triptracker application.

System Message

Message entered in the System Options page that will display for all users on the Today screen.

T

Taxable

Setting which indicates whether the current entry should be taxable.

Time threshold for trip requests

Time of the day during with trips cannot be scheduled. This pertains to Monday through Friday.

Trip Re-submission Handling

Option which determines whether a re-submitted trip will begin at the first step of the approval process or step at which it was rejected.

Trip Statuses

Requested

A trip has been submitted and is waiting for approval.

Rejected

A requested trip has been rejected by an approver

Approved

An approver at each level of the approval path has approved the trip

Cancelled

Trip has been cancelled.

Scheduled

The driver(s) and vehicle(s) have been assigned to the trip

Completed
The trip has taken place and all pertinent information needed by the invoice has been entered.

Awaiting Payment
The invoice has been generated for the trip

Partial Payment
A payment has been posted to the trip, but an outstanding balance remains

Paid
The trip has been paid in full

Closed
All action has been taken on the trip; there will be no further updates

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