



INFOFINDER *le* 12.0

FIELD TRIP REQUEST FORM

EMPOWER DISTRICT PERSONNEL



FIELD TRIP REQUEST FORM

What is Infofinder le?

infofinder le is a web-based solution from transfinder that automates the process of requesting and approving Field Trips. With infofinder le, time-consuming paperwork for teachers, coaches and administrators can be eliminated.

infofinder le:

- Completely automates the process of requesting, budgeting, approving, and scheduling Field Trips
- Enables district personnel to monitor the status of their requests
- Allow coaches and teachers to request vehicles for Field Trips, verify approvals, and see trip schedules on a calendar

The following procedure provides step-by-step instructions for completing the Field Trip Request Form and submitting the request. The various types of form fields on the Field Trip request form are as follows:

Text box - Enter a single line of text into this type of field.

Text area - Enter multiple lines of text into this type of field, text will automatically wrap.

Drop-down list - Use your mouse or the up and down arrows on your computer keyboard to scroll through a drop-down list. Typing the first letter of the value that you are searching for, will populate the field with the first option in the list beginning with that letter. You can then scroll down through the list to locate the appropriate option. Click on an option to select it.

Combo box - Use your mouse or the up and down keys on your computer keyboard to scroll through the items in the drop-down list of a combo-box. Enter the first few letters of a value into the text box and click on the drop-down arrow, and only those options in the list that begin with the letters entered will be listed. You must then scroll through the new list to locate the desired option; when you find it, click on it to select it. If the appropriate option doesn't already exist, enter it into the text box. The value entered will be added to the list for future use.

Date field - Enter the date or use the drop-down calendar to select the date. The format is MM/DD/YYYY. The forward slashes will be entered for you as you type the date.

Time field - Begin entering a time and the time field will auto-fill. Then use the up and down arrows on your computer keyboard or the control to select the exact time, and whether it is in the morning or afternoon.

Number field - Enter a number or use the control to increment or decrement the value by one.

FIELD TRIP REQUEST FORM

Main Notes Documents History

***-Required Fields**
***-All trips must be requested at least 10 full school day(s) in advance. (Next valid date 10/11/2016)**

Template: Saratoga Performing Arts Center (SPAC)

* Field Trip Name: Saratoga Performing Arts Center (SPAC) 101116

* School: Schenectady High School / HS

* Department: MUS

Activity: ORC

Contact

Contact: Mary Brown

Phone: 518-555-2396 Phone Ext: 102

Email: mbrown@transfindercsd.com

Departure

* Depart Date: 10/11/2016 * Time: 10:30 AM

Return Date: 10/11/2016 Time: 01:30 PM

Departure: Schenectady High School / HS

Notes:

Required fields are determined by the Site Administrator and are indicated by an asterisk (*).

- 1 If configured, select a **Template** from the drop-down list. This will populate various fields on the request form, eliminating the need for you to enter or select the information.
- 2 Enter the name of the Field Trip into the **Field Trip Name** text box. Include school & group name
Example: NYS Museum, Boston Aquarium, Ski Trip, Track Meet 06/10/16, etc.
- 3 Select your **School** from the drop-down list.
- 4 Select the **Department** that you are requesting a Field Trip for from the drop-down list, when configured.¹
- 5 Select an **Activity** from the drop-down list, when configured.¹
- 6 Enter the name of the person to contact with questions about the request into the **Field Trip Contact** text box, and their **Phone** number, **Phone Ext**, and **Email** address into their respective text boxes.
- 7 Enter the **Depart Date** into the date field or select it using the drop-down calendar, and enter the departure **Time** into the text box or select it using the control.
- 8 Enter the **Return Date** into the date field or select it using the drop-down calendar, and enter the return **Time** into the text box or select it using the control.
- 9 Select a **Departure** school from the drop-down list.
- 10 Enter **Notes** about the departure into the text area.

¹ If your Site Administrator has configured Account/Billing Codes and enabled Strict Account Code Tracking, the Department and Activity fields will be combined.

FIELD TRIP REQUEST FORM

Destination	
* Destination:	Saratoga Performing Arts Center
Street:	140 Main Street
City:	Saratoga Springs
State:	NY
Zip:	12085
Contact:	Mary Brown
Title:	School Tour Director
Phone:	518-555-0024
Phone Ext:	104
Fax:	518-555-1235
Email:	
Notes:	
Directions	
Directions:	

Required fields are determined by the Site Administrator and are indicated by an asterisk (*).

- 11 You have the option of entering a new **Destination** into the text box, or selecting an existing one from the drop-down list, if your Site Administrator has not enabled Strict Destinations. When enabled, you can only select a destination from the drop-down list.
- 12 Enter the **Street** address of the destination into the text box.²
- 13 Enter the **City** where the destination is located into the text box.²
- 14 Enter the two letter **State** abbreviation for the state where the destination is located into the text box.²
- 15 Enter the **Zip** Code for the destination into the text box.²
- 16 Enter the name of your **Contact** at the destination into the text box.
- 17 Enter the contact's job **Title**.
- 18 Enter the **Phone** number and **Phone Ext** of the contact into their respective text boxes.
- 19 Enter the **Fax** number for the contact at the destination into the text box.
- 20 Enter the **Email** address for the contact at the destination into the text box.
- 21 Enter other pertinent information about the destination into the **Notes** text area.
- 22 Enter the directions from the departure point to the destination into the **Directions** field.

² This field will be disabled when Strict Destinations is enabled and you are required to select a Destination from the drop-down list. If you select a Destination from the drop-down list when you are not required to and this field is auto-filled, you may edit the information.

FIELD TRIP REQUEST FORM

Trip Details			
Equipment:	BOXED LUNCHES AND ICE CHESTS		
Classification:	ART		
Number of Students:	24	Number of Adults:	4
Number of Wheel Chairs:	0	Number of Vehicles:	1
Estimated Miles:	0	Estimated Cost:	0
Estimated Hours:	0	Total Cost:	\$0.00

Required fields are determined by the Site Administrator and are indicated by an asterisk (*).

- 23 If configured, select any **Equipment** that also needs to be transported from the drop-down list.
- 24 If configured, select the Field Trip **Classification** from the drop-down list.
- 25 Enter the **Number of Students** requiring transportation into the text box or select it using the control.
- 26 Enter the **Number of Adults** requiring transportation into the text box or select it using the control.
- 27 Enter the number of Students in wheelchairs requiring transportation into the **Number of Wheel Chairs** text box or select it using the control.
- 28 Enter the **Number of Vehicles** required into the text box or select it using the control.
- 29 Enter the **Estimated Miles** into the text box or select it using the control.
- 30 Enter the **Estimated Cost** of the transportation into the text box.
- 31 Enter the **Estimated Hours** into the text box or select it using the control.

FIELD TRIP REQUEST FORM

Invoicing Information:

Code (Department/Activity)	Template Amount (%)	Amount (\$)	PO	Invoice Date	Payment Date
arts-hs-2016-2017 (MUS/ORC)		150.00			
arts-ms-2016-2017 (MUS/ORC)		150.00			
[Select One]					
Rows: 2		Total: 300.00			

Required fields are determined by the Site Administrator and are indicated by an asterisk (*).

- 32 Select the Account Billing **Code (Department/Activity)** from the drop-down list, for each account that will be billed for the Field Trip.³ Will be added by approver
- 33 If you are creating a Field Trip request from a template, and the Site Administrator entered billing information for the Field Trip, the **Template Amount** will be displayed. Field Trips can be billed to accounts based on a maximum dollar amount or a percentage of the cost.
- 34 The **Amount (\$)** will be entered by the individual responsible for billing, once the Field Trip has been completed.
- 35 The **PO** number will be entered by the individual responsible for billing, once the Field Trip has been completed.
- 36 The **Invoice Date** will be entered by the individual responsible for billing, when the account is invoiced.
- 37 The **Payment Date** will be entered by the individual responsible for billing, once payment is received.
- 38 To remove an account, click on the **Remove Account** button.
- 39 Once the dollar amounts have been entered, the **Total** cost of the Field Trip will appear at the bottom of the form.

³ This field may be auto-filled if you are creating a Field Trip request from a template.



FIELD TRIP REQUEST FORM

Main Notes Documents History

40 Use the text area on the **Notes** tab to record anything you'd like about the Field Trip.

FIELD TRIP REQUEST FORM

***Map It!**

41 When you click on the ***Map It!** button, if you have address information entered for the *Destination* - Google Maps will open and provide you with directions from the *Departure* school to the destination.⁴

Cancel/Return to List

42 Click on the **Cancel/Return to List** button to cancel the Field Trip request. You will be redirected to a list of previously requested Field Trips.

Delete Request

43 Click on the **Delete Request** button to delete the Field Trip request. You will be prompted to confirm the deletion.

Save

44 Click on the **Save** button to save and submit the Field Trip request.

Your field trip has been submitted:

Reference #00011

45 When you submit the request, you will receive a Reference #. Click on the **Close** button, and you will be redirected to a list of previously requested Field Trips.

Close

⁴ *Map It! is a service provided by Google.com. Transfinder is not responsible for the information returned by Google.com or the mapping services.



FIELD TRIP REQUEST FORM

Main Notes Documents History

Filename	Description	Classification	Last Updated Date	Last Updated By	Attached	Size (KB)
Spac.jpg	Entrance Orientation	FIELD TRIPS	05/30/2013 13:28	Admin	2	204

- 46 Once a Field Trip request is saved, if you have permission to view documents, any documents attached to the record will appear on the **Documents** tab. Click on a link to open or save the document.



FIELD TRIP REQUEST FORM

Main Notes Documents **History**

Date	Status	User	Notes
8/16/2016 10:35:23 AM	Transportation Approved	Admin	Transportation Approved

- 47 Once you save a Field Trip request, you can view the status of the request by looking at the **History** tab.

Main
Notes
Documents
History

*-Required Fields
*-All trips must be requested at least 10 full school day(s) in advance. (Next valid date 10/11/2016)

Requested:
Status:

09/27/16 15:26 PM By: Admin
Level 2 - Request Approved
Transportation Approved
Change To: [Select New Status]
Comments: [Select New Status]

*- Field Trip Name:
*- School:
*- Department:
Activity:

Saratoga Pe
Craig Eleme
MUS
ORC

Contact

Contact:

Level 1 - Request Submitted
Level 2 - Request Declined
Level 2 - Request Approved
Level 3 - Request Declined
Level 3 - Request Approved
Level 4 - Request Declined
Level 4 - Request Approved
Declined by Transportation
Transportation Approved
Canceled - Request Canceled
Completed - Request Completed

When a Field Trip request is submitted, an email notification is sent to the next person in the Field Trip request/approval process. When the approver clicks on the link in the email message, they will be redirected to the Infofinder *le* login page. After logging in, the Field Trip request will open to the **Main** tab.

To change the Status of a Field Trip request:

- 1 Select the correct status from the **Change To** drop-down list.
- 2 Enter **Comments** into the free-form text area. See Note*
- 3 Click on the **Save** button at the bottom of the form.

*Before saving the Approval please scroll down and input a valid travel account number.

End of Process