

















INFOFINDER le 12.0

FIELD TRIP REQUEST FORM

EMPOWER DISTRICT PERSONNEI





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:

for future use.

- 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

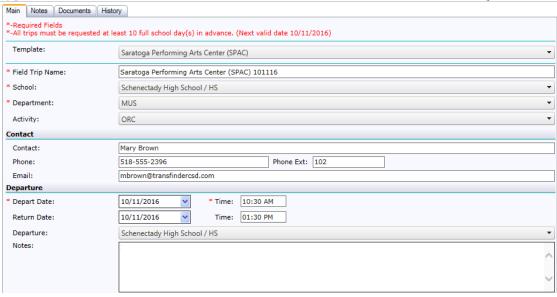
Date field - Enter the date or use the drop-down calendar to select the date. The format is MM/DD/YYYY. The forward slashes will be entered for you as you type the date.

doesn't already exist, enter it into the text box. The value entered will be added to the list

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.

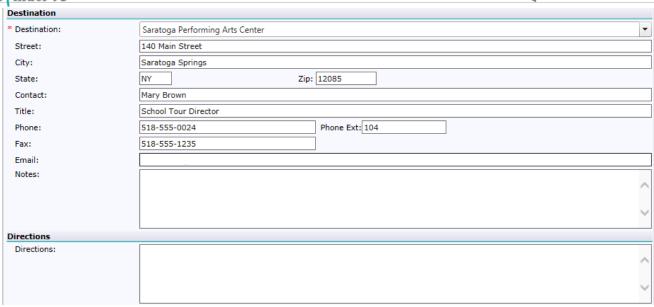




- 1 If configured, select a **Template** from the drop-down list. This will populate various fields on the request form, eliminating the need for you to enter or select the information.
- 2 Enter the name of the Field Trip into the **Field Trip Name** text box. <u>Include school & group name</u> **Example:** 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.



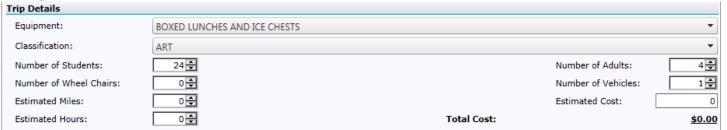


- 11 You have the option of entering a new **Destination** into the text box, or selecting an existing one from the drop-down list, if your Site Administrator has not enabled Strict Destinations. When enabled, you can only select a destination from the drop-down list.
- 12 Enter the **Street** address 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.

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.







- 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.





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

- 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.



 $^{^{\}rm 3}$ This field may be auto-filled if you are creating a Field Trip request from a template.





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





*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:

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.

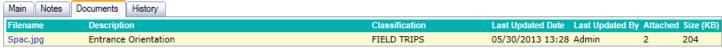
Reference #00011



^{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.







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.



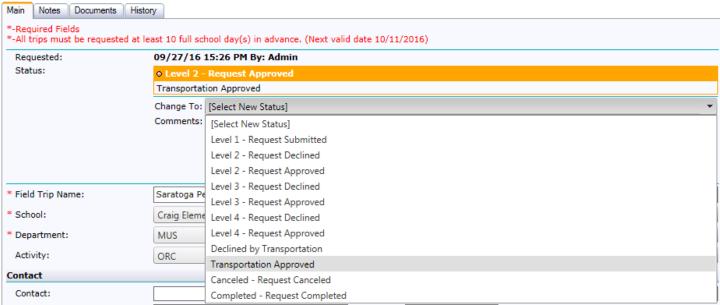


Main Notes Documents History							
Date			Status	User	Notes		
8/16/2	016 10:	35:23 AM			Transportation Approved	Admin	Transportation Approved

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







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

