

Chapter 6

Working with Reports

Along with the Field Trip Inquiry Routine T.O.M. offers schools several reports to give schools insight into their field trip activity. These powerful reports are some of the most attractive features of the T.O.M. system. Almost all reports feature several selection / sub setting options. This advanced flexibility makes these reports powerful tools that allow you to create a vast number of unique reports for any number of special purposes.

Accessing the Reports

To access the reports click the Report menu option at the top of your screen and then click the option for the report you wish to produce (Figure 6-1), such as Budget Report.



Figure 6-1. Accessing Reports on the Reports Menu

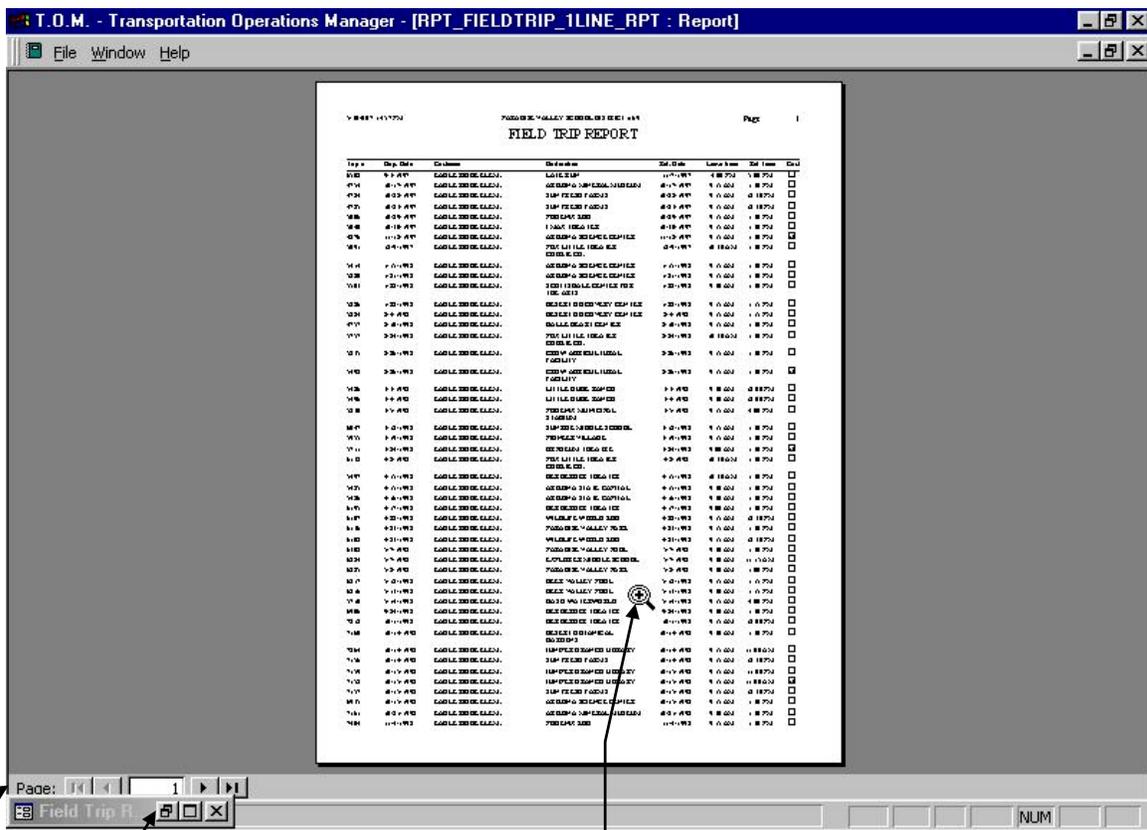
Previewing and Printing Reports

Once you have selected your report, you can either print the report on your printer or preview it on the screen. The Print button and Preview button is always available at the bottom of the screen, such as in the Field Trip Reports screen shown in Figure 6-3.



- Click the Print button to print the report on your printer or to a file. Remember to choose the Print to file option on your Print window if you wish to print the report to a file.
- Click the Preview button to preview the report on the screen, which is useful for previewing the report before printing it. When you click the Preview button, the report is processed and the Preview window is displayed with your report (Figure 6-2). In Print Preview, the mouse cursor changes to a magnifying glass. Click the page to zoom in and out as necessary. If your estimate is more than one page, you can view additional pages using the VCR-type controls in the lower left corner of the screen.

When you are finished, you can click the  in the top right corner of the screen or choose Close from the File menu to close the Preview Screen. If you wish to print the report, click the Restore button on the reports screen title bar in the lower left corner of the screen (such as the Field Trip Reports screen shown in Figure 6-3), then click the Print button.



Click the Restore icon to return to the reports screen.

In Print Preview, the mouse cursor changes to a magnifying glass. Click on the page to zoom in (+) and out (-) as necessary.

If your estimate is more than one page, you can view additional pages using the VCR-type controls in the lower left corner of the screen.

Figure 6-2. The Report Preview Screen



Working with Field Trip Reports

The Field Trip Reports is actual ten different reports that you may select from a powerful report options screen. All of these reports list detail or summary field trip information.

To print Field Trip Reports open the Reports menu, select the Reports menu and then click the Field Trip Reports option (Figure 6-1). (See *Accessing the Reports* at the beginning of this chapter for details.) The Field Trip Reports screen is displayed (Figure 6-3). This screen offers you wide variety of selection and sorting options. This is in many ways very similar in its operation to the Field Trip Inquiry screen. You can enter search parameters and then click the Find All button and the screen will display the results of the search.

One of the ways this screen is different from the Field Trip Inquiry screen is that it uses a ‘Tabbed’ format. The screen uses the Selection / Title tab (Figure 6-3), the Sorting tab (Figure 6-4) and the Records Selected tab (Figure 6-5). Click on a tab to see its options. The following describes the fields in each tab.

Entering Search Criteria on the Selection / Title Tab

Click on the Selection / Title tab in the Field Trip Reports screen (Figure 6-3), if it’s not already selected. This tab allows you to enter the search selection parameters of the report, which report you wish to print and a user title that you wish to include on the report.

Figure 6-3. The Selection / Title Tab on the Field Trip Reports Screen

Departure Date Range: You can use the preprogrammed date ranges found in the Dates field drop-down list or enter your own date ranges. If you use the preprogrammed date ranges, click on the Dates field drop-down arrow and select from one of 12 date ranges, such as ‘Today’, ‘This Week’, ‘Last Year’ etc. The date ranges are automatically filled in for you.



If you enter your own date ranges, use these fields to search your field trips by their departure date. T.O.M. makes it easy for you to key in any date. Rather than having to type in a “/” or a “-” when typing in the date, T.O.M. automatically places a “/” between the Month, Day and Year (this is called ‘masking’). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of “3/2/1994” you would type “03021994” and T.O.M. would automatically place two “/” in the appropriate positions in the date. The year must be entered as the full year (ex. “2000” not “00”). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

Selected Trip #: As with the field trip requests, T.O.M. automatically numbers each field trip with a unique number when it is added to the field trip database. You can then search the field trip database for a specific field trip number.

Selected Schedule: A schedule is a list of drivers that you create when you first set up T.O.M. When a field trip is added to the field trip database you assign a schedule to that field trip. You may then search the field trip database for all field trips with a specific schedule. Click on the down arrow to the right of the Schedule field to see a list of schedules that your Transportation Department has created. Once you find the schedule you desire click on it and it will automatically appear in the Schedule field. **NOTE:** T.O.M. will only search the field trips on their FIRST schedule. It will not search their other four schedules to see if they match the selected schedule entered here.

Fund: You may select a specific fund that the field trip is charged against. This field is a drop down list box. If you don’t know the number of the fund that you want to charge a field trip against click the down arrow next to the Fund field. A list of all the funds you entered when setting up T.O.M. will appear. Locate the desired fund and click on it to place the fund in the Fund field.

If you know the number of the fund then enter it here or select it from the drop-down list. If you don’t know the number of the fund click the Fund button to look up the fund by name. See *Appendix D – Searching for Funds Using the Fund Screen* for details about searching for funds.

Customer: As you can see, this field already has your school’s customer number entered by T.O.M. You cannot change this field, which means you only see *your* field trip requests no matter what other search parameters you enter.

Destination: This is the number of the destination of the field trip. Your Transportation Department has a list of all destinations that schools in your district have taken at least one field trip to. If you know the number of the destination of the field trip then enter it here. If you don’t know the destination number, T.O.M. will provide an easy way to lookup your destination by the destination name (or description). To do this you simply click the Destination button. This causes the Destination Search screen to appear. See *Appendix C – Working With the Destination Search Screen* for details about searching for destinations as well as adding, changing and deleting destinations.

Selected Request #: If the field trip was created when a field trip request was accepted by the Transportation Department the field trip is *stamped* with the number of the field trip request that it was created from. You then search the field trips in the field trip database by the your original field trip request number. For example, you can search the field trip database for the field trip that was created from your field trip request #100.

Selected Category: A field trip may be assigned a category code defined by you. These codes can be used to group similar field trips (for example, boys basketball). You may then search the field trip database for



field trips with a specific category. Click on the down arrow to the right of the Category field to see a list of Categories that you created when you first setup T.O.M. Once you find the Category you desire click on it and it will automatically appear in the Category field

Selected Grade: You may search your field trips by the student grade level that you assigned to the trips. Click on the down arrow to the right of the grade field to see a list of grades that you may select. Once you find the grade you desire click on it and it will automatically appear in the grade field.

Selected Division: Customers can be assigned to divisions. You may then search field trips by division. If you know the division that you wish to search by then enter here. If you don't know the division you desire T.O.M. provides you with an easy *drop down list* of all of the divisions that you have created. Just click the down arrow to the right of the Division field and a list of existing divisions will display on your screen. To select a division click on the row containing the desired division and that division will automatically appear in the Select Division field.

Selected Internal Number: Some school districts have preprinted, pre-numbered field trip request forms and they track the field trip by that preprinted number. T.O.M. stores this information in the Internal Field Trip number. You may search your field trips by this number.

Assigned: Check this checkbox to search for all assigned field trips. An assigned field trip is a field trip that has drivers and vehicles assigned to perform the field trip.

Unassigned: Check this checkbox to search for all field trips that have NOT been assigned. An assigned field trip is a field trip that has drivers and vehicles assigned to perform the field trip.

Billed: Check this checkbox to search for all field trips that have been billed.

Unbilled: Check this checkbox to search for all field trips that have NOT been billed.

Canceled: Check this checkbox to search for all field trips that have been canceled.

Open: Check this checkbox to search for all field trips that have NOT been canceled.

What Report: This is a report that you want to print. Choose from a list of ten reports. The following is a brief description of each of these reports:

Report Name	Sample Report	Description
1 Line	Figure 6-6	This is a very simple report listing one line of basic information for each field trip. This includes the trip date, destination, return date and time.
2 Line	Figure 6-7	This contains all information in 1line report and then includes a second line of information. This second line includes contact, purpose, est. time and miles, # of students and adults and grade.
3 Line	Figure 6-8	This contains all information in 2 line report and then a third line of information. This third line includes the category, fund, internal #, vehicle types and capacities.



Report Name	Sample Report	Description
4 Line	Figure 6-9	This contains all information in the 3 line report and then a fourth line of information. This fourth line includes the schedules (driver lists) assigned to the trips and the # of vehicles required.
With Drivers	Figure 6-10	This report contains three lines of basic information about each field trip and then a list of all drivers and vehicles assigned to this list.
With Drivers New Page Per Day	Figure 6-11	This report is very similar in format to the With Drivers report. This report has two key differences from the With Drivers report: 1. You cannot define its sort order. It always sorts by trip departure date, schedule and trip number. 2. This report will start a new page if there is a break in the days of the field trip. So you will see all of field trips for March 6 th on one page and March 7 th on another page.
Category Summary	Figure 6-12	This report will summarize all selected field trips by the field trip categories assigned to the field trips. The report will list the various field trip categories and summary field trip statistics for each category.
Customer Summary	Figure 6-13	This report will summarize all selected field trips by the customer assigned to the field trips. The report will list the various customers and summary field trip statistics for each customer.
Destination Summary	Figure 6-14	This report will summarize all selected field trips by the destination assigned to the field trips. The report will list the various destinations and summary field trip statistics for each destination.
Destination Category Summary	Figure 6-15	This report will summarize all selected field trips by the destination categories assigned to the field trips. The Transportation Department can group the list of destinations in its database into categories that it creates. The report will list the various destination categories and summary field trip statistics for each destination category.
Fund Summary	Figure 6-16	This report will summarize all selected field trips by the funds assigned to the field trips. The report will list the various funds and summary field trip statistics for each fund.
Grade Summary	Figure 6-17	This report will summarize all selected field trips by grade assigned to the field trips. The report will list the various grades and summary field trip statistics for each grade.

Split Trips: This is a drop-down list that lets you select from three choices:

Split Trip Options	Description
None	Do not break down any split trips. T.O.M. takes just the customer and fund on the main screen.
Customer	Break all split trips down to the customer level. For example, if a trip is split between two customers, T.O.M. makes it two reporting trips—one for each customer.
Fund	Break all split trips down to the customer and fund level. For example, if a trip is split between two customers and two funds, T.O.M. makes it four reporting trips—one for each customer and fund combination.

Title: This is a title that you can have printed on the report that you select. Any of the selected reports will print this title. The title will print at the top of each page of your report below your district name and



the main name of this report. You can use this title to further describe the report you've printed, such as "July's Field Trips."

Selected P.O. #: This is the Purchase Order number assigned to the field trip. Many school districts issue purchase orders for all field trips taken.

Entering Sort Criteria on the Sorting Tab

Click on the Sorting tab in the Field Trip Reports screen (Figure 6-4), if it's not already selected. This tab allows you to enter the sort and order fields of the report. You may enter up to three sort fields. You may also define how you want the fields to be sorted.

Figure 6-4. The Sorting Tab on the Field Trip Reports Screen

Sort by #(1,2 or 3): These are the three sort fields that you may define for the report. Some of the reports will not allow you to define the sort fields. This is because these reports are summary reports or by definition require a certain sort pattern. The reports that you CAN define the sort order are: 1 Line Report, 2 Line Report, 3 Line Report, 4 Line Report and the With Drivers Report. You have quite a list of fields to choose from when defining the sort fields. Click on the down arrow to the right of the each sort field to see a list of fields that you may choose from. Once you find the sort field you desire click on it and it will automatically appear in the sort field.

Order by #(1,2, or 3): This is the order that you want the related sort field to be sorted. You may choose either ascending, (a-z, smallest-largest, oldest-newest) or descending (z-a, largest-smallest, newest-oldest).

Use Standard T.O.M. Reports Formats: Check this checkbox to automatically use the regular reports format for printing. If you uncheck this checkbox you can use a custom reports format that you have stored in the MS Access database TRIPRPT.MDB. This report is selected using the ACCESS format drop-down list. Contact your T.O.M. administrator if you need more information about custom reports.



Build Employee Assignment Report Database: This checkbox is enabled only if the Use Standard T.O.M. Trip Ticket Access Formats checkbox is unchecked. Many of T.O.M.'s reports need a special temporary database of trip assignment information to be created. This is because of the complexity of reporting on things such as shuttle trips and trips with multiple destinations. T.O.M. has a procedure that automatically creates this temporary database that the reports then use. If you are running a custom report it may need this temporary database to be built, in which case you should check this box. If you have used the T.O.M. Field Trip Report with Drivers as a base for the custom report, you will need to check this box.

Email Report: T.O.M. allows you to automatically email most of your T.O.M. Reports as attached MS Word, MS Excel, Text or other files. To send your report as an email simply check this checkbox. For more information on this feature see Appendix G – “Emailing Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.

Email Report: T.O.M. allows you to save most of your T.O.M. Reports as MS Word, MS Excel, Text or other files. To save your report as a file simply check this checkbox. For more information on this feature see Appendix F – “Saving Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.

Viewing Selected Field Trips on the Records Selected Tab

Click on the Records Selected tab in the Field Trip Reports screen (Figure 6-5), if it's not already selected. This tab displays all of the field trips that matched your search parameters of the last search. To update this list click the Find All button.

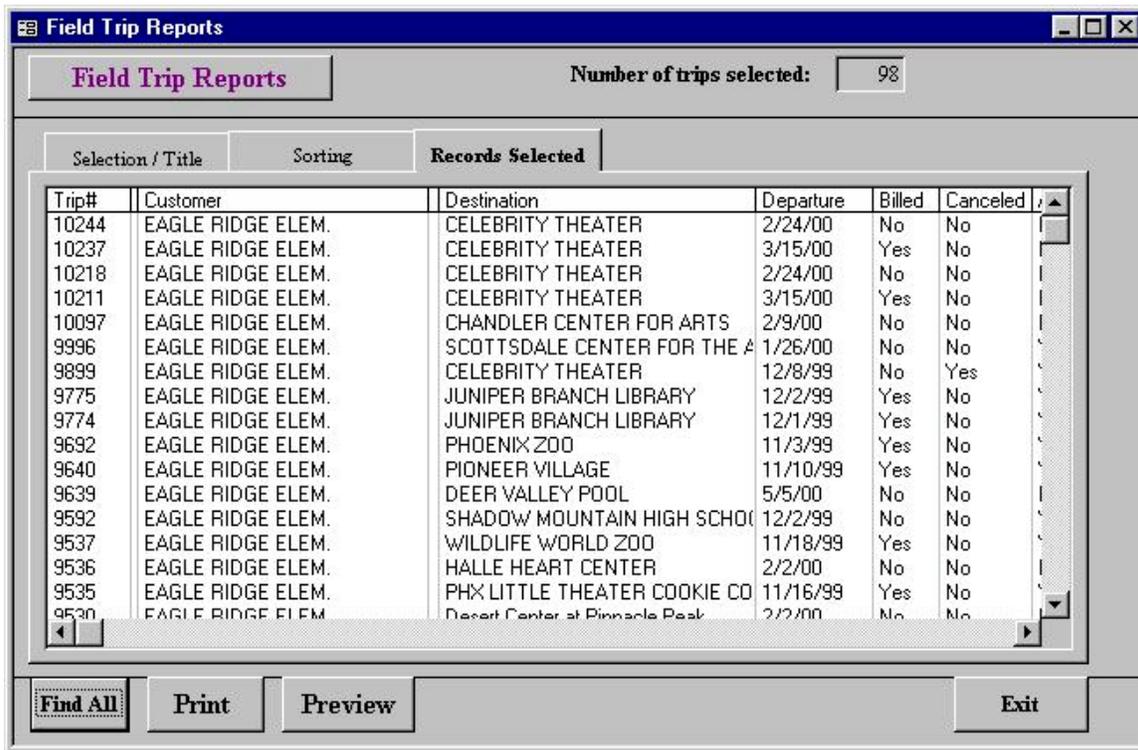


Figure 6-5. The Records Selected Tab on the Field Trip Reports Screen

Previewing and Printing Field Trip Reports



Once you have selected your report, you can either print the report on your printer or preview it on the screen. The Print and Preview buttons are always available at the bottom of the screen (Figure 6-5). See *Previewing and Printing Reports* previously described in this chapter for details.

Figure 6-6 through Figure 6-17 shows a list of samples the Field Trip Reports that you can print from the Field Trip Reports screen. Refer to the table in the description of the What Report field found previously in this section for a complete reference of the Field Trip Reports.

2/22/00 2:37:21 PM		PARADISE VALLEY SCHOOL DISTRICT # 69				Page: 1	
FIELD TRIP REPORT							
Trip #	Dep. Date	Customer	Destination	Ret. Date	LeaveTime	Ret Time	Cncl
9135	2/25/2000	AIRE LIBRE ELEM.	ARIZONA SCIENCE CENTER	2/25/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9543	2/24/2000	BOULDER CREEK ELEM.	VISTA VERDE MIDDLE SCHOOL	2/24/2000	9:15 AM	12:00 PM	<input type="checkbox"/>
9050	2/24/2000	COPPER CANYON ELEM	SUNRISE MIDDLE SCHOOL	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9561	2/22/2000	DESERT SHADOWS ELEM.	HORIZON HIGH SCHOOL	2/22/2000	9:15 AM	1:00 PM	<input type="checkbox"/>
10244	2/24/2000	EAGLE RIDGE ELEM.	CELEBRITY THEATER	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
10218	2/24/2000	EAGLE RIDGE ELEM.	CELEBRITY THEATER	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9362	2/24/2000	EAGLE RIDGE ELEM.	CELEBRITY THEATER	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9458	2/25/2000	ECHO MOUNTAIN ELEM.	PIONEER VILLAGE	2/25/2000	9:15 AM	1:15 PM	<input type="checkbox"/>
9716	2/23/2000	FOOTHILLS ELEM.	HORIZON HIGH SCHOOL	2/23/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9461	2/24/2000	FOOTHILLS ELEM.	DESERT DISCOVERY CENTER	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9083	2/25/2000	GOLD DUST ELEM.	HALLE HEART CENTER	2/25/2000	9:15 AM	1:15 PM	<input type="checkbox"/>
9055	2/25/2000	GOLD DUST ELEM.	CROW AGRICULTURAL FACILITY	2/25/2000	9:15 AM	1:00 PM	<input type="checkbox"/>
10222	2/24/2000	GRAYHAWK ELEM	SUNRISE MIDDLE SCHOOL	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9098	2/25/2000	GRAYHAWK ELEM	HALLE HEART CENTER	2/25/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9052	2/24/2000	GRAYHAWK ELEM	SUNRISE MIDDLE SCHOOL	2/24/2000	9:15 AM	1:30 PM	<input checked="" type="checkbox"/>
10220	2/25/2000	GREENWAY MIDDLE	FIREBIRD RACEWAY	2/25/2000	9:30 AM	4:30 PM	<input type="checkbox"/>
9500	2/24/2000	GREENWAY MIDDLE	VARIOUS	2/24/2000	4:45 PM	5:30 PM	<input type="checkbox"/>
9457	2/25/2000	LIBERTY ELEM.	PHOENIX MUSEUM OF HISTORY	2/25/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
10011	2/23/2000	NORTH RANCH ELEM.	PIONEER VILLAGE	2/23/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9682	2/23/2000	NORTH RANCH ELEM.	PHOENIX ZOO	2/23/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9605	2/25/2000	NORTH RANCH ELEM.	TEMPE PERFORMING ARTS CENTER	2/25/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9709	2/24/2000	QUAIL RUN ELEM.	VISTA VERDE MIDDLE SCHOOL	2/24/2000	9:15 AM	12:00 PM	<input checked="" type="checkbox"/>
9674	2/24/2000	SANDPIPER- MASCOT	PHOENIX ZOO	2/24/2000	9:15 AM	1:15 PM	<input type="checkbox"/>
9553	2/22/2000	SONORAN SKY ELEM	HORIZON HIGH SCHOOL	2/22/2000	9:15 AM	12:00 PM	<input type="checkbox"/>
9863	2/24/2000	VILLAGE VISTA ELEM.	HORIZON HIGH SCHOOL	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
9601	2/24/2000	VILLAGE VISTA ELEM.	PIONEER VILLAGE	2/24/2000	9:15 AM	1:30 PM	<input type="checkbox"/>
* * * Total Count: 26							

Figure 6-6. The ILine Field Trip Report



2/22/00 2:37:47 PM		PARADISE VALLEY SCHOOL DISTRICT # 69						Page: 1		
FIELD TRIP REPORT										
Trip # / Contact	Dep. Date	Customer / Purpose	Destination / Est. Time Shtl Est. Miles			Ret. Date / # of Stud.	LeaveTime / # of Adults	Ret Time/ Grade	Cncl Assgn	
9135 judy hoffner	2/25/2000	AIRE LIBRE ELEM. view planetarium and exh	ARIZONA SCIENCE CENTER	4.75	<input type="checkbox"/>	55.00	2/25/2000 80	9:15 AM 20	1:30 PM <input type="checkbox"/>	<input type="checkbox"/>
9543 MICHAEL ORLIKOF	2/24/2000	BOULDER CREEK ELEM. BAND/PICKUP QUAILRUN	VISTA VERDE MIDDLE SCHOOL	3.50	<input type="checkbox"/>	20.00	2/24/2000 60	9:15 AM 6	12:00 PM <input type="checkbox"/>	<input type="checkbox"/>
9050 David Cross	2/24/2000	COPPER CANYON ELEM Honors Band Rehearsals	SUNRISE MIDDLE SCHOOL	4.75	<input type="checkbox"/>	22.00	2/24/2000 56	9:15 AM 6	1:30 PM <input type="checkbox"/>	<input type="checkbox"/>
9561 C. Heldt - Music	2/22/2000	DESERT SHADOWS ELEM. 1-w/c	HORIZON HIGH SCHOOL	4.25	<input type="checkbox"/>	28.00	2/22/2000 62	9:15 AM 6	1:00 PM <input type="checkbox"/>	<input type="checkbox"/>
10244 Marks	2/24/2000	EAGLE RIDGE ELEM.	CELEBRITY THEATER	4.75	<input type="checkbox"/>	50.00	2/24/2000 262	9:15 AM 47	1:30 PM <input type="checkbox"/>	<input type="checkbox"/>
10218 Marks	2/24/2000	EAGLE RIDGE ELEM.	CELEBRITY THEATER	4.75	<input type="checkbox"/>	50.00	2/24/2000 262	9:15 AM 47	1:30 PM <input type="checkbox"/>	<input type="checkbox"/>
9362 Jamie Marks	2/24/2000	EAGLE RIDGE ELEM.	CELEBRITY THEATER	4.75	<input type="checkbox"/>	50.00	2/24/2000 262	9:15 AM 47	1:30 PM <input type="checkbox"/>	<input type="checkbox"/>
9458 Kathy Olsen	2/25/2000	ECHO MOUNTAIN ELEM.	PIONEER VILLAGE	4.50	<input type="checkbox"/>	70.00	2/25/2000 180	9:15 AM 18	1:15 PM 05	<input type="checkbox"/>

Figure 6-7. The 2 Line Field Trip Report

2/22/00 2:38:03 PM		PARADISE VALLEY SCHOOL DISTRICT # 69						Page: 2		
FIELD TRIP REPORT										
Trip # / Contact / Category	Dep. Date	Customer / Purpose / Fund	Destination / Est. Time Shtl Est. Miles / Internal # Mult Grade			Ret. Date / Capacity / # Stud.	LeaveTime / ArriveTime / # Adults	Ret Time/ # Hndc	Cncl Assgn Billed	
9052 David Cross	2/24/2000	GRAYHAWK ELEM PV oncert rehearsal 6 - FINE ARTS	SUNRISE MIDDLE SCHOOL	4.75	<input type="checkbox"/>	22.00	2/24/2000 High 35	9:15 AM 4	1:30 PM 4	<input checked="" type="checkbox"/> #Vh: <input type="checkbox"/> <input type="checkbox"/>
10220 KRIS HOOVER	2/25/2000	GREENWAY MIDDLE 14 - OTHER	FIREBIRD RACEWAY	4.00	<input type="checkbox"/>	75.00	2/25/2000 Medium 60	9:30 AM 6	4:30 PM 6	<input type="checkbox"/> #Vh: <input type="checkbox"/> <input type="checkbox"/>
9500 BILL WISEVIC	2/24/2000	GREENWAY MIDDLE AFTER SCHOOL DANCE 8 - STUDENT ACTIVITY	VARIOUS	1.00	<input type="checkbox"/>	0.00	2/24/2000 Medium 351	4:45 PM 1	5:30 PM 1	<input type="checkbox"/> #Vh: <input type="checkbox"/> <input type="checkbox"/>
9457 Kay Chatham - Grade 3	2/25/2000	LIBERTY ELEM. 8 - STUDENT ACTIVITY	PHOENIX MUSEUM OF HISTORY	4.50	<input type="checkbox"/>	45.00	2/25/2000 High 50	9:15 AM 10	1:30 PM 10	<input type="checkbox"/> #Vh: <input type="checkbox"/> <input type="checkbox"/>
10011 NANCY DORR	2/23/2000	NORTH RANCH ELEM. 9 - PTO / PTSA	PIONEER VILLAGE	4.50	<input type="checkbox"/>	70.00	2/23/2000 High 85	9:15 AM 20	1:30 PM 20	<input type="checkbox"/> #Vh: <input type="checkbox"/> <input type="checkbox"/>

Figure 6-8. The 3 Line Field Trip Report



A /00 2:38:14 PM Page: 1

PARADISE VALLEY SCHOOL DISTRICT # 69
FIELD TRIP REPORT

Trip # / Contact / Category / Schedules #1	Dep. Date	Customer / Purpose / Fund / Schedules #2	Destination / Est. Time / Est. Miles / Internal # / Schedules #4	Ret. Date / Capacity / # Stud. / Grade / Schedules #5	Start Time / Arrive Time / # Adults / V. Type	Lv Time / End Time / # Hndc / Addl. Type	Cncl Assgn Billed # Alt
9135 judy hoffner	2/25/2000	AIRE LIBRE ELEM. view planetarium and exh 8 - STUDENT ACTIVITY	ARIZONA SCIENCE CENTER 4.75 55.00	2/25/2000 High 80	9:15 AM 12:30 PM 20 1	<input type="checkbox"/> #Vh: <input type="checkbox"/> 2 <input type="checkbox"/>	
MD						<input type="checkbox"/> 0	
9543 MICHAEL ORLIKOFT	2/24/2000	BOULDER CREEK ELEM. BAND/PICKUP QUAILRUN 6 - FINE ARTS	VISTA VERDE MIDDLE SCHOOL 3.50 20.00	2/24/2000 High 60	9:15 AM 12:00 PM 6 1	<input type="checkbox"/> #Vh: <input type="checkbox"/> 1 <input type="checkbox"/>	
MD						<input type="checkbox"/> 0	
9050 David Cross	2/24/2000	COPPER CANYON ELEM Honors Band Rehearsals 6 - FINE ARTS	SUNRISE MIDDLE SCHOOL 4.75 22.00	2/24/2000 High 56	9:15 AM 1:30 PM 6 1	<input type="checkbox"/> #Vh: <input type="checkbox"/> 1 <input type="checkbox"/>	
MD						<input type="checkbox"/> 0	
9561 C. Heldt - Music	2/22/2000	DESERT SHADOWS ELEM. 1-w/c 6 - FINE ARTS	HORIZON HIGH SCHOOL 4.25 28.00	2/22/2000 High 62	9:15 AM 1:00 PM 6 1	<input type="checkbox"/> #Vh: <input type="checkbox"/> 2 <input type="checkbox"/>	
MD						<input type="checkbox"/> 1	

Figure 6-9. The 4 Line Field Trip Report



2/22/00 2:44:18 PM PARADISE VALLEY SCHOOL DISTRICT # 69 Page: 1

FIELD TRIP REPORT

Selected Date Range: 12/5/1999 - 12/11/1999 Selected Schedule:

Trip #	Departure Date / Return Date	Customer	Destination / Purpose	LeaveTime/ Arrive Time	Ret. Time LeaveTime	# Veh	Shtl D/R
9951	Wednesday, December 08, 1999	ALL SAINTS LUTHERAN CHURCH	NORTH PARK MOBILE HOME	4:30 PM	5:30 PM		<input type="checkbox"/>
4:30 PM	Wednesday, December 08, 1999	Schedule: WD					<input type="checkbox"/>
Est. Driver Time:						1.50	

		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 367 - GRIFFITH, DEAN	127	WD			
9917	Tuesday, December 07, 1999	CACTUS VIEW ELEM.	ARIZONA STATE CAPITAL	9:15 AM	12:00 PM		<input type="checkbox"/>
9:15 AM	Tuesday, December 07, 1999	Schedule: MD					<input type="checkbox"/>
Est. Driver Time:						3.25	

		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 173 - BELICH, ARTHUR	196	MD			
		347 - THOMPSON-SEVERSO	204	MD			
9582	Thursday, December 09, 1999	CACTUS VIEW ELEM.	PHX LITTLE THEATER COOKIE CO.	9:15 AM	1:00 PM		<input type="checkbox"/>
9:15 AM	Thursday, December 09, 1999	Schedule: MD					<input type="checkbox"/>
Est. Driver Time:						4.25	

* CANCELED *							
11/16/1999							

9394	Wednesday, December 08, 1999	CACTUS VIEW ELEM.	SCOTTSDALE CENTER FOR THE ARTS	9:30 AM	1:30 PM		<input type="checkbox"/>
9:30 AM	Wednesday, December 08, 1999	Schedule: MD					<input type="checkbox"/>
Est. Driver Time:						4.50	

		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 152 - GULBRONSEN, KATHY	182	MD			
		328 - LEGG, HENRY	187	MD			
9367	Thursday, December 09, 1999	CACTUS VIEW ELEM.	PHX LITTLE THEATER COOKIE CO.	9:15 AM	1:30 PM		<input type="checkbox"/>
9:15 AM	Thursday, December 09, 1999	Schedule: MD	1-W/C BUS				<input type="checkbox"/>
Est. Driver Time:						4.75	

		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 298 - ROCK, BRIAN	173	MD			
		302 - HANSEN, MELLANNIE	122	MD			
		328 - LEGG, HENRY	187	MD			
		330 - ARCHER, NEWTON	37	MD			

Figure 6-10. The Field Trip Report With Drivers



Trip #	Departure Date / Return Date	Customer	Destination / Purpose	LeaveTime/ Arrive Time	Ret. Time LeaveTime	# Veh	Shtl D/R
9993	Monday, December 06, 1999	FOOTHILLS ELEM.	BANK ONE BUILDING	9:15 AM	1:30 PM	1	<input type="checkbox"/>
9:15 AM	Monday, December 06, 1999	Schedule: MD		10:00 AM	12:30 PM		<input type="checkbox"/>
						Est. Driver Time:	4.75
		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 334 - GREEN, BENDRAMINA	205	MD			
9436	Monday, December 06, 1999	GREENWAY MIDDLE	LIFE CARE CENTER	9:30 AM	12:45 PM	1	<input type="checkbox"/>
9:30 AM	Monday, December 06, 1999	Schedule: MD	Chorus				<input type="checkbox"/>
						Est. Driver Time:	4.00
		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 272 - WEISENBURGER, KIM	207	MD			
10065	Monday, December 06, 1999	LARKSPUR ELEM.	MENDOZA ELEMENTARY	9:30 AM	1:00 PM	2	<input type="checkbox"/>
9:30 AM	Monday, December 06, 1999	Schedule: MD					<input type="checkbox"/>
						Est. Driver Time:	4.00
		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 367 - GRIFFITH, DEAN	158	MD			
		409 - ROSENBERG, BARRY	99	MD			
9711	Monday, December 06, 1999	GRAYHAWK ELEM	ARIZONA STATE CAPITAL	9:45 AM	1:15 PM	2	<input type="checkbox"/>
9:45 AM	Monday, December 06, 1999	Schedule: MD	Sing				<input type="checkbox"/>
						Est. Driver Time:	4.00
		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 152 - GULBRONSEN, KATHY	182	MD			
		328 - LEGG, HENRY	187	MD			
9700	Monday, December 06, 1999	EXPLORER MIDDLE	HYATT REGENCY GAINNEY RANCH	11:00 AM	1:15 PM	2	<input type="checkbox"/>
11:00 AM	Monday, December 06, 1999	Schedule: MD	sing at concert				<input type="checkbox"/>
						Est. Driver Time:	3.00
		DRIVER	VEHICLE #	SCHEDULE	DEST. LEG		
		* 298 - ROCK, BRIAN	173	MD			
		330 - ARCHER, NEWTON	150	MD			

Figure 6-11. The Field Trip Report With Drivers and Page Break on Each Day



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FIELD TRIP CATEGORY SUMMARY REPORT

Field Trip Category	# Trips	# Splits	# Student	# Adults	# Passengers	Total Hours	Total Miles	Amount
	934	0	57,738	3,855	61,593	6,119.05	49,871.30	\$122,228.60
Band	4	0	720	60	780	66.13	801.90	\$1,377.08
Extended Day Program	12	0	540	63	603	72.57	339.00	\$1,171.60
SUMMER CAMP	1	0	350	33	383	45.73	405.00	\$1,081.19
St. Cloud Parks and Recreation	11	0	330	44	374	42.88	137.00	\$766.89
TEEN CAMP	1	0	75	10	85	9.83	60.00	\$205.58
	4	0	220	26	246	18.00	364.00	\$565.50
Report Totals:	967	0	59,973	4,091	64,064	6,374.20	51,978.20	\$127,396.44
Total Trips Less Splits:	967							

Figure 6-12. The Field Trip Category Summary Report

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PARADISE VALLEY SCHOOL DISTRICT # 69

FIELD TRIP CUSTOMER SUMMARY REPORT

Customer	# Trips	# Splits	# Student	# Adults	# Passengers	Total Hours	Total Miles	Amount
55 - EAGLE RIDGE ELEM.	32	0	3,217	489	3,706	233.25	2,586.00	\$4,426.90
Report Totals:	32	0	3,217	489	3,706	233.25	2,586.00	\$4,426.90
Total Trips Less Splits:	32							

Figure 6-13. The Field Trip Customer Summary Report



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FIELD TRIP DESTINATION SUMMARY REPORT

Field Trip Category	# Trips	# Splits	# Student	# Adults	# Passengers	Total Hours	Total Miles	Amount
103 - BOURGADE HIGH SCHOOL	1	0	42	4	46	6.75	56.00	\$185.25
105 - BROPHY COLLEGE PREP.	10	0	355	25	380	56.75	497.00	\$1,035.95
112 - CACTUS PARK	1	0	60	4	64	4.75	51.00	\$92.35
121 - CARL HAYDEN HIGH SCHOOL	1	0	15	1	16	17.75	58.00	\$265.55
122 - CASA GRAND UNION H.S.	1	0	0	50	50	8.00	175.00	\$209.00
123 - CASTLES AND COASTERS	1	0	150	2	152	18.00	168.00	\$522.00
125 - CELEBRITY THEATER	6	0	1,186	186	1,372	77.00	1,034.00	\$1,621.40
137 - CHAPPARAL PARK	4	1	165	60	225	15.00	134.00	\$275.40
143 - COCONINO HIGH SCHOOL	1	0	45	4	49	5.50	306.00	\$255.10
153 - CROW AGRICULTURAL FACILITY	2	0	143	23	166	11.75	321.00	\$345.35
154 - DEER VALLEY POOL	2	0	220	40	260	24.25	182.00	\$424.45

Figure 6-14. The Field Trip Destination Summary Report

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FIELD TRIP DESTINATION CATEGORY SUMMARY REPORT

Destination Category	# Trips	# Splits	# Student	# Adults	# Passengers	Total Hours	Total Miles	Amount
- No Category	324	0	24,675	3,365	28,040	2,293.25	29,109.00	\$48,634.45
Movie - Movie Theaters	3	0	186	22	208	22.75	286.00	\$467.35
Mus - Museams	25	0	1,392	274	1,666	126.75	1,631.00	\$2,743.85
Park - Parks	15	1	1,001	278	1,279	90.75	997.00	\$1,777.95
Report Totals:	367	1	27,254	3,939	31,193	2,533.50	32,023.00	\$53,623.60
Total Trips Less Splits:	366							

Figure 6-15. The Field Trip Destination Category Summary Report



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PARADISE VALLEY SCHOOL DISTRICT # 69
FIELD TRIP FUND SUMMARY REPORT

Fund	# Trips	# Splits	# Student	# Adults	# Passengers	Total Hours	Total Miles	Amount
1 - A.I.A. HIGH SCHOOL ATHLETICS	105	0	3,839	305	4,144	612.25	5,931.00	\$11,517.85
14 - OTHER	14	0	1,362	142	1,504	105.50	1,731.00	\$2,410.10
15 - OUT OF DISTRICT (CHARTERS)	14	0	873	343	1,216	117.50	1,377.00	\$3,828.00
16 - COMMUNITY ED.	4	0	252	87	339	31.25	419.00	\$657.65
18 - GIFTED	1	0	55	5	60	9.50	112.00	\$190.70
19 - GRANT	1	0	622	94	716	42.75	603.00	\$917.55
2 - A.I.A. NON-ATHLETICS	6	0	142	17	159	44.50	467.00	\$858.70
20 - GIFTS AND DONATIONS	1	0	100	10	110	4.00	132.00	\$131.20
6 - FINE ARTS	12	0	645	59	704	67.00	572.00	\$1,214.20
7 - DISTRICT SERVICES	1	0	50	3	53	4.25	31.00	\$73.85
8 - STUDENT ACTIVITY	155	1	14,010	1,979	15,989	1,063.25	14,621.00	\$22,594.85
9 - PTO / PTSA	59	0	5,544	917	6,461	464.50	6,505.00	\$9,941.50
Report Totals:	373	1	27,494	3,961	31,455	2,566.25	32,501.00	\$54,336.15
Total Trips Less Splits:	372							

Figure 6-16. The Field Trip Fund Summary Report

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FIELD TRIP GRADE SUMMARY REPORT

Grade	# Trips	# Splits	# Student	# Adults	# Passengers	Total Hours	Total Miles	Amount
First Grade	4	0	210	133	343	21.25	346.00	\$483.85
Second Grade	2	0	151	27	178	18.00	162.00	\$331.20
Third Grade	4	0	392	97	489	33.00	490.00	\$723.00
Fourth Grade	14	0	887	135	1,022	75.75	1,144.00	\$1,671.15
Fifth Grade	4	0	447	55	502	41.00	627.00	\$909.20
Sixth Grade	9	1	635	105	740	50.50	638.00	\$1,039.30
Kindergarten	3	0	313	135	448	26.75	407.00	\$591.95
	333	0	24,459	3,274	27,733	2,300.00	28,687.00	\$48,586.50
Report Totals:	373	1	27,494	3,961	31,455	2,566.25	32,501.00	\$54,336.15
Total Trips Less Splits:	372							

Figure 6-17. The Field Trip Grade Summary Report



Working with the Money Owed (Accounts Receivable) Report

The Money Owed Report (Figure 6-20) was designed to give the Transportation Department a complete listing of the outstanding balance each customer has for each field trip. The Money Owed Report allows you to select a specific customer or all customers as well as a date range of invoice dates. This report will then automatically select all field trips that have been billed for the specific customer (or all customers) and have been billed within the date range specified by the user.

The Money Owed Report contains the following information:

- The selected customer.
- The selected date range.
- The field trip number of each field trip with a balance.
- The departure date of each field trip reported.
- The fund assigned to each field trip reported.
- The destination description of each field trip reported.
- The purpose of each field trip reported.
- The balance of money owed by the customer for each field trip reported.
- A total balance for each customer in the report.

To print the Money Owed Report, select the Reports menu and then click the Money Owed Report option (Figure 6-1). (See *Accessing the Reports* at the beginning of this chapter for details.) The Money Owed Report screen is displayed (Figure 6-18).

Figure 6-18. The Money Owed Report Screen

This screen also allows you to enter a departure date range of field trips to include on this report. Enter your report options and then click the Print button to print the report or the Preview button to view the report on the screen. (See *Previewing and Printing Reports* previously described in this chapter for details.) Figure 6-20 shows a sample report.



The Selection Tab

Selected Customer: This is automatically set to your schools customer number. You cannot change it.

Bill Date Range: You can use the preprogrammed date ranges found in the Dates field drop-down list or enter your own date ranges. If you use the preprogrammed date ranges, click on the Dates field drop-down arrow and select from one of 12 date ranges, such as ‘Today’, ‘This Week’, ‘Last Year’ etc. The date ranges are automatically filled in for you.

If you enter your own date ranges, use these fields to search your field trips by their departure date. T.O.M. makes it easy for you to key in any date. Rather than having to type in a “/” or a “-” when typing in the date, T.O.M. automatically places a “/” between the Month, Day and Year (this is called ‘masking’). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of “3/2/1994” you would type “03021994” and T.O.M. would automatically place two “/” in the appropriate positions in the date. The year must be entered as the full year (ex. “2000” not “00”). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix A – Using the Pop Up Calendar and Time Entry Screens* for more details.

New Page for Each Customer: This check box is not used for School Customers. Whether you check or uncheck this box will not affect your report.

Show Additional Detail: Check this checkbox if you wish to include an additional line in the report that contains P.O.#, Grade, Trip Category and Internal Trip Number information.

The Other Tab

The screenshot shows a dialog box titled "Money Owed Report" with a blue title bar and a close button (X) in the top right corner. The main area has a grey background with a purple title "Money Owed Report" in a rounded rectangle. Below this, there are two tabs: "Selection" and "Other", with "Other" being the active tab. The "Other" tab contains the following elements: a checkbox labeled "Use standard T.O.M. Report Format:" which is checked; a dropdown menu labeled "ACCESS Format:" with "RPT_AR_RPT" selected; and two unchecked checkboxes labeled "Email Report:" and "Report to File:". At the bottom of the dialog, there are three buttons: "Print", "Preview", and "Cancel".

Figure 6. 19 – The Other Tab of the Money Owed Report



Use Standard T.O.M. Reports Formats: T.O.M. allows you to use Microsoft Access 97 to customize many of T.O.M.'s reports. The Money Owed Report is a report that you can customize. Check this checkbox to automatically use the regular trip ticket format for printing. If you uncheck this checkbox you can use a custom trip ticket format that you have stored in the MS Access database TRIPRPT.MDB. This report is selected using the ACCESS format drop-down list. See *Appendix B – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own reports.

Email Report: T.O.M. allows you to automatically email most of your T.O.M. Reports as attached MS Word, MS Excel, Text or other files. To send your report as an email simply check this checkbox. For more information on this feature see Appendix G – “Emailing Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.

Email Report: T.O.M. allows you to save most of your T.O.M. Reports as MS Word, MS Excel, Text or other files. To save your report as a file simply check this checkbox. For more information on this feature see Appendix F – “Saving Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.



2/23/00 8:04:32 AM

PARADISE VALLEY SCHOOL DISTRICT # 69

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Money Owed Report**Selected Customer Name:****Selected Bill Date Range:** 1/1/1999 — 12/31/1999

Trip #	Trip Date	Bill Date	Fund	Destination	Purpose	Balance
Customer: 37 AIRE LIBRE ELEM.						
9341	10/1/1999	10/26/1999	8	ARIZONA STATE CAPITAL	see objectives	\$175.80
9345	12/1/1999	12/3/1999	8	Heard Museum		\$82.25
9376	10/1/1999	10/27/1999	8	PHOENIX ZOO		\$178.20
9430	11/12/1999	12/3/1999	8	CROW AGRICULTURAL FACILITY	1-W/C	\$199.90
9431	11/18/1999	12/3/1999	8	PIONEER VILLAGE		\$175.30
9783	11/17/1999	12/15/1999	8	TEMPE PERFORMING ARTS CENTER		\$94.50
Customer Total:						\$905.95
Customer: 140 ALL SAINTS LUTHERAN CHURCH						
9749	10/22/1999	11/24/1999	15	BANK ONE BALLPARK		\$195.00
9750	10/23/1999	11/24/1999	15	BANK ONE BALLPARK	DROP&RETURN	\$210.00
Customer Total:						\$405.00
Customer: 41 ARROWHEAD ELEM						
9212	9/23/1999	10/27/1999	8	DESERT BONTANICAL GARDENS		\$170.15
9309	10/19/1999	10/27/1999	8	PHOENIX ART MUSEUM	Monet Exhibit	\$85.75
9310	10/20/1999	11/30/1999	8	PHOENIX ART MUSEUM	Monet Exhibit	\$75.40
9389	10/14/1999	11/2/1999	8	PARADISE VALLEY COMM COLLEGE	1-w/c bus	\$67.45
9400	12/1/1999	12/3/1999	8	SCOTTSDALE CENTER FOR THE ARTS		\$147.20
9421	10/20/1999	11/23/1999	8	DESERT DISCOVERY CENTER		\$156.35
9575	11/17/1999	12/3/1999		ARIZONA SCIENCE CENTER	View Exhibits-1W/C BUS	\$165.10
9870	11/16/1999	12/21/1999		FRYS FOOD STORES	1-W/C BUS	\$35.00

Figure 6-20. The Money Owed Report



Working with the Detailed Field Trip Budget Report

The Detailed Field Trip Budget Reports were designed to give your school an exact accounting of your field trip budget.

The Detailed Field Trip Budget Report gives you all of the information you need to know concerning your field trip budget. This report will list your beginning field trip budget amount, all billed field trips, all outstanding field trips, and the remaining field trip budget amount.

“What about field trips funded by PTSA or an athletic organization?” No problem, T.O.M. allows you to designate whether a field trip is to be charged against your field trip budget or not. The Detailed Field Trip Budget Report will also list those field trips (both billed and outstanding) that do not affect your field trip budget. These field trips are listed separately and will not be subtracted from your field trip budget.

The Detailed / Summary Field Trip Budget Reports allow you to select a range of departure dates. You can specify whether you wish to print the Detailed Budget Report or the Summary Budget Report.

The Detailed Field Trip Budget Report contains the following information:

- The selected departure date range.
- The name and number of your school.
- The beginning field trip budget
- A section containing all Billed Field Trips. This section contains:
 - » The number of the billed field trip
 - » The departure date of the billed field trip
 - » The fund that the billed field trip was charged against
 - » The destination of the billed field trip
 - » The purpose of the billed field trip
 - » The actual amount billed
 - » A subtotal of all billed field trips at the end of the section
- A section containing all Outstanding (unbilled) Field Trips. This section contains:
 - » The number of the outstanding field trip
 - » The departure date of the outstanding field trip
 - » The fund that the outstanding field trip will be charged against
 - » The destination of the outstanding field trip
 - » The purpose of the outstanding field trip
 - » The estimated amount the field trip will be billed
 - » An estimated subtotal of all outstanding field trips at the end of the section
- A remaining field trip budget balance at the end of the report.

To print the Field Trip Budget Report, select the Reports menu and then click the Field Trip Budget Report option (Figure 6-1). (See *Accessing the Reports* at the beginning of this chapter for details.) The Employee Payroll Hours Report screen is displayed (Figure 6-21).



Field Trip Budget Report

Field Trip Budget Report

Selected Billing
Customer: 55 EAGLE RIDGE ELEM.

Departure Date Range: [] [] Dates: []

Summary Report Only

Show Field Trips That Didn't Affect the Budget Email Report:

Report to File:

Print Preview Cancel

Figure 6-21. The Field Trip Budget Report Screen

Enter your report options and then click the Print button to print the report or the Preview button to view the report on the screen. (See *Previewing and Printing Reports* previously described in this chapter for details.) Figure 6-22 shows a sample report.

Selected Customer: This is automatically set to your schools customer number. You cannot change it.

Departure Date Range: This a range of dates that you enter that specify which field trips will be included in this report. Only field trips with departure dates that fall within this date range will be included in this report. For quick entry of these dates click on the calendar buttons (the blue and white buttons) to the right of each date. This will cause T.O.M.'s popup calendar screen to appear. This screen allows you to quickly point and click to a date on the calendar. For more information see Appendix A - The Popup Calendar Screen.

Show Field Trips That Didn't Affect The Budget: This is a check box field. If it is checked you are telling T.O.M. that you want ALL field trips for your school to print on the report. As you know you can designate that a field trip should not be subtracted from a your budget. To do this you would assign a fund that you defined as one not to be subtracted from your field trip budget to a field trip that should not affect the budget. When this option is checked those field trips that didn't affect the budget will also print in separate sections on the report.

If this option is not checked then just those field trips with funds designated as those as to be subtracted from the budget will print on this report.

Email Report: T.O.M. allows you to automatically email most of your T.O.M. Reports as attached MS Word, MS Excel, Text or other files. To send your report as an email simply check this checkbox. For more information on this feature see Appendix G – “Emailing Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.

Email Report: T.O.M. allows you to save most of your T.O.M. Reports as MS Word, MS Excel, Text or other files. To save your report as a file simply check this checkbox. For more information on this feature



see Appendix F – “Saving Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.



Trip #	Trip Date	Destination/ Fund	Purpose	Amount
Customer: 41 ARROWHEAD ELEM				
Beginning Customer Field Trip Budget:				\$4,000.00
Field Trips That Were Billed That Were Subtracted From Field Trip Budget:				
8766	2/10/2000	PHOENIX MUSEUM OF HISTORY 8	Reinforce study of Phx	\$19.00
8767	2/11/2000	PHOENIX MUSEUM OF HISTORY 8	Reinforce study of Phx	\$101.80
9544	2/2/2000	FLEISCHER MUSEUM 8	View artwork in museum	\$66.50
9545	2/3/2000	FLEISCHER MUSEUM 8	View sculpture in museum	\$47.50
9548	2/16/2000	FLEISCHER MUSEUM 8	View art in a museum	\$78.40
9549	2/8/2000	FLEISCHER MUSEUM 8	View art in a museum	\$95.00
9551	2/4/2000	FLEISCHER MUSEUM 8	View art in a museum	\$79.00
Total Billed Field Trip Expense for Customer:				\$487.20
Field Trips That Were Not Billed That Will Be Subtracted From Field Trip Budget:				
8639	5/4/2000	PHOENIX ZOO 8	Nocturnal Study of Animal	\$115.80
8640	4/27/2000	PHOENIX ZOO 8	Nocturnal study of animal	\$115.80
9669	4/26/2000	PHOENIX SYMPHONY HALL 8		\$67.05
9702	3/15/2000	DESERT WINDS NURSERY 8		\$36.30
9703	3/15/2000	DESERT WINDS NURSERY 8		\$42.80
9704	3/16/2000	DESERT WINDS NURSERY 8		\$39.55
9705	3/16/2000	DESERT WINDS NURSERY 8		\$42.80
9789	3/6/2000	NORTH CANYON HIGH SCHOOL 8	District Field Day	\$44.00
Total Estimated Expense for Field Trips Not Yet Billed:				\$504.10
Remaining Customer Field Trip Budget:				\$3,008.70

Figure 6-22. The Detailed Field Trip Budget Report



Working with the Recap Report

The Recap Report was designed to give the Transportation Department a list of all field trips sorted and subtotaled by Fund and then Customer within Fund (Figure 6-25) or by Customer and Fund within Customer (Figure 6-26).

Since the customer and the fund are the two main accounting classifications for each field trip the Recap Report was designed to provide a detailed report accounting for field trip miles and hours for each of these two classifications. The Recap Report allows the Transportation Department to answer the question what was the cost of field trips taken for each customer and fund. The Recap Report can be sorted and subtotaled by fund and then customer or by customer and then fund.

The Recap Report includes the following information:

- An indication as to whether the user selected to sort and subtotal by Fund and then Customer or Customer and then Fund.
- The date range selected by the user.
- The field trip number.
- The fund number.
- The fund description.
- The customer number.
- The customer name.
- The total number of miles for all drivers for each field trip.
- The total number of hours for all drivers for each field trip.
- The total cost for each field trip.
- A total / subtotal number of miles for all field trips for each customer.
- A total / subtotal number of hours for all field trips for each customer.
- A total / subtotal cost for all field trips for each customer.
- The annual field trip budget for each customer.
- A total / subtotal number of miles for all field trips for each fund.
- A total / subtotal number of hours for all field trips for each fund.
- A total / subtotal cost for all field trips for each fund.

To print the Recap Report, select the Reports menu and then click the Recap Report option (Figure 6-1). (See *Accessing the Reports* at the beginning of this chapter for details.) The Recap Report screen is displayed (Figure 6-23).

This screen uses the 'Tabbed' format. The screen uses the Selection and Sorting tab (Figure 6-23) and an Other tab (Figure 6-24). Click on a tab to see its options. Enter your report options as described below and then click the Print button to print the report or the Preview button to view the report on the screen. (See *Previewing and Printing Reports* previously described in this chapter for details.) Figure 6-25 and Figure 6-26 show sample reports.



Entering Search and Sort Criteria on the Selection and Sorting Tab

Click on the Selection and Sorting tab (Figure 6-23), if it's not already selected. This tab allows you to enter selection criteria and sort the resulting report in two different sort orders.

Figure 6-23. The Selection and Sorting Tab in the Recap Report Screen

Date Range: You can use the preprogrammed date ranges found in the Dates field drop-down list or enter your own date ranges. If you use the preprogrammed date ranges, click on the Dates field drop-down arrow and select from one of 12 date ranges, such as 'Today', 'This Week', 'Last Year' etc. The date ranges are automatically filled in for you.

If you enter your own date ranges, use these fields to search your field trips by their departure date. T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a "-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called 'masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "2000" not "00"). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix A – Using the Pop Up Calendar and Time Entry Screens* for more details.

Customer: This is the customer number assigned to your school. T.O.M. knows what school you belong to and automatically fills this number in for you. You may not change this number.

Fund: This is the fund that the field trip is charged against. If you know the number of the fund then enter it here or select it from the drop-down list. If you don't know the number of the fund click the Fund button



to look up the fund by name. See *Appendix D – Searching for Funds Using the Fund Screen* for details about searching for funds.

Sorted By: Click the Fund / Customer button to sort and subtotal the report by fund and then customer (Figure 6-25). Click the Customer / Fund button to sort and subtotal the report by customer then fund (Figure 6-26).

Selecting the Report Format on the Other Tab

Click on the Other tab (Figure 6-24), if it's not already selected. This tab allows you to choose the standard T.O.M. report format or select a custom report format you have created in Microsoft Access.

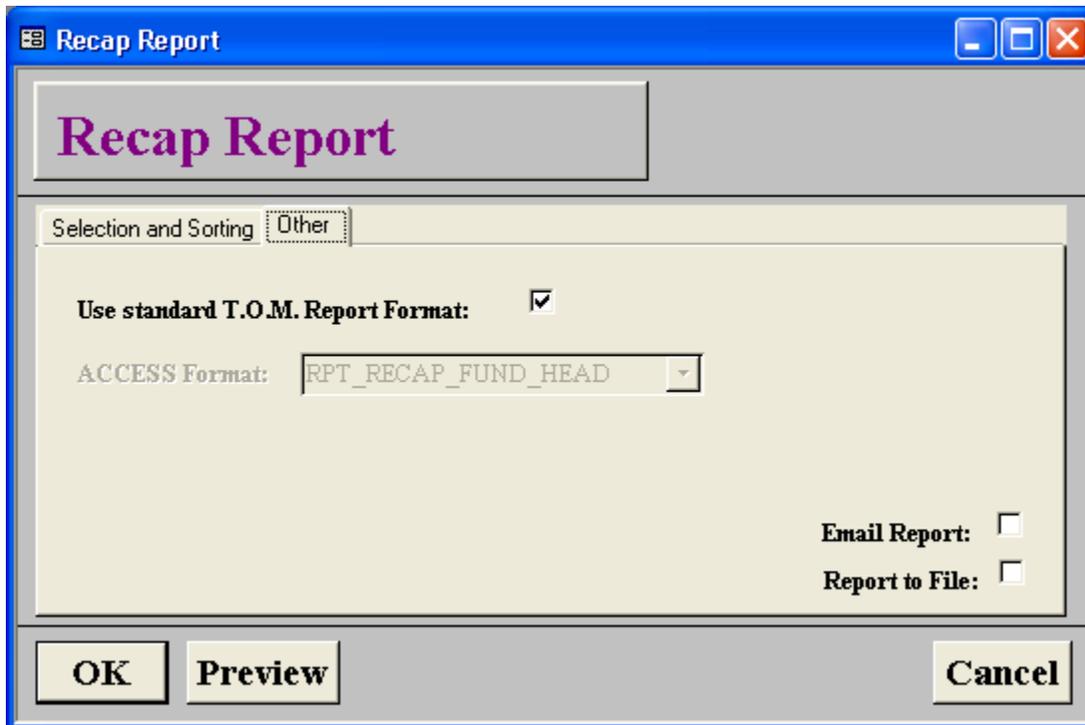


Figure 6-24. The Other Tab in the Recap Report Screen

Use Standard T.O.M. Reports Formats: Check this checkbox to automatically use the regular reports format for printing. If you uncheck this checkbox you can use a custom reports format that you have stored in the MS Access database TRIPRPT.MDB. This report is selected using the ACCESS format drop-down list. Contact your T.O.M. administrator if you need more information about custom reports.

Email Report: T.O.M. allows you to automatically email most of your T.O.M. Reports as attached MS Word, MS Excel, Text or other files. To send your report as an email simply check this checkbox. For more information on this feature see Appendix G – “Emailing Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.

Email Report: T.O.M. allows you to save most of your T.O.M. Reports as MS Word, MS Excel, Text or other files. To save your report as a file simply check this checkbox. For more information on this feature see Appendix F – “Saving Your T.O.M. Reports as Word, Excel, Text or other Files” found later in this book.



Trip #	Customer	Destination	# of Miles	# of Hours	Total Cost	splt
10144	SHADOW MOUNTAIN HIGH SCHOOL	FLAGSTAFF HIGH SCHOOL	313	7	\$278.80	<input type="checkbox"/>
Departure Date:	12/16/99	Purpose:	B BKB Tournament			
10145	SHADOW MOUNTAIN HIGH SCHOOL	ASU Recreation Center	13	6.75	\$95.55	<input type="checkbox"/>
Departure Date:	12/11/99	Purpose:	Cheer Competition			
10179	SHADOW MOUNTAIN HIGH SCHOOL	BENEDICT FIELD	63	8.5	\$148.30	<input type="checkbox"/>
Departure Date:	12/11/99	Purpose:	BOYS SOCCER			
10181	SHADOW MOUNTAIN HIGH SCHOOL	MOON VALLEY HIGH SCHOOL	56	2.5	\$66.10	<input type="checkbox"/>
Departure Date:	12/17/99	Purpose:	Wrestling Tournament			
10198	SHADOW MOUNTAIN HIGH SCHOOL	FLOWING WELLS HIGH SCHOOL	213	16	\$335.80	<input type="checkbox"/>
Departure Date:	12/27/99	Purpose:	G-BASKETBALL TOURN			
Total Customer:			13,216.00	1,122.75	\$8,982.80	
Total Fund:			49,305.30	4,346.42	\$36,880.58	
Fund: 10 - PREVENTION						
9641	CACTUS VIEW ELEM.	PHOENIX MUNICIPAL STADIUM	228	18	\$370.80	<input type="checkbox"/>
Departure Date:	11/3/99	Purpose:				
Total Customer:			228.00	18.00	\$370.80	
7559	DESERT SPRINGS ELEM.	GLENDALE COMMUNITY COLLEGE	159	13	\$264.40	<input type="checkbox"/>
Departure Date:	4/9/99	Purpose:				
Total Customer:			159.00	13.00	\$264.40	
Total Fund:			387.00	31.00	\$635.20	

Figure 6-25. Recap Report by Fund then Customer



Trip #	Fund	Destination	# of Miles	# of Hours	Total Cost	splt
2/23/00 8:52:59 AM PARADISE VALLEY SCHOOL DISTRICT # 69 Page:36						
Recap Report						
Sorted by: Customer / Fund Date Range: 1/1/1999 - 2/31/1999						
Customer: Title One Preschool						
7858	23-TITLE I	INDIAN BEND ELEM.	32	8.5	\$129.70	<input type="checkbox"/>
Departure Date:		1/22/99	Purpose:			
Total Fund:			32.00	8.50	\$129.70	
Total Customer:			32.00	8.50	\$129.70	
Annual Budget:					\$0.00	
Customer: S.W. HEADSTART/ ECHO MT						
7860	14-OTHER	LIFE CARE CENTER	8	2.25	\$34.05	<input type="checkbox"/>
Departure Date:		2/2/99	Purpose:		MINI BUS	
7861	14-OTHER	LIFE CARE CENTER	18	2.5	\$43.30	<input type="checkbox"/>
Departure Date:		2/16/99	Purpose:		MINI BUS	
7862	14-OTHER	LIFE CARE CENTER	8	2	\$30.80	<input type="checkbox"/>
Departure Date:		3/9/99	Purpose:		MINI BUS	
7863	14-OTHER	LIFE CARE CENTER	8	2	\$30.80	<input type="checkbox"/>
Departure Date:		3/23/99	Purpose:		MINI BUS	
7864	14-OTHER	LIFE CARE CENTER	8	2	\$30.80	<input type="checkbox"/>
Departure Date:		4/6/99	Purpose:		MINI BUS	
7865	14-OTHER	LIFE CARE CENTER	12	2.5	\$39.70	<input type="checkbox"/>
Departure Date:		4/20/99	Purpose:		MINI BUS	
7866	14-OTHER	LIFE CARE CENTER	14	2	\$34.40	<input type="checkbox"/>
Departure Date:		5/4/99	Purpose:		MINI BUS	
Total Fund:			76.00	15.25	\$243.85	
7859	15-OUT OF DISTRICT (CHARTERS)	LIFE CARE CENTER	8	2.25	\$34.05	<input type="checkbox"/>
Departure Date:		1/19/99	Purpose:		MINI BUS	
7872	15-OUT OF DISTRICT (CHARTERS)	ARIZONA PUPPET THEATER	27	3	\$55.20	<input type="checkbox"/>
Departure Date:		3/10/99	Purpose:		mini bus	
8436	15-OUT OF DISTRICT (CHARTERS)	SCOTTSDALE CENTER FOR THE ARTS	46	4	\$79.60	<input type="checkbox"/>
Departure Date:		4/5/99	Purpose:		MINI BUS	
Total Fund:			81.00	9.25	\$168.85	
Total Customer:			157.00	24.50	\$412.70	
Annual Budget:					\$4,000.00	

Figure 6-26. Recap Report by Customer Then Fund