

Chapter 8

Management Reports

As the name indicates many of T.O.M.'s reports assist you in the management of the Transportation Department. These powerful reports are some of the most attractive features of the T.O.M. system. Almost all 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 Management Reports

To access the Management Reports click the Report menu option at the top of your screen and then click the Management Reports submenu option (Figure 8-1).



Figure 8-1. Accessing the Management Reports Menu

Click the report option you wish to produce, such as Driver Report. See the section later in this chapter if you need details about producing the selected report. The Driver Hours Reports option has a submenu with additional report options.

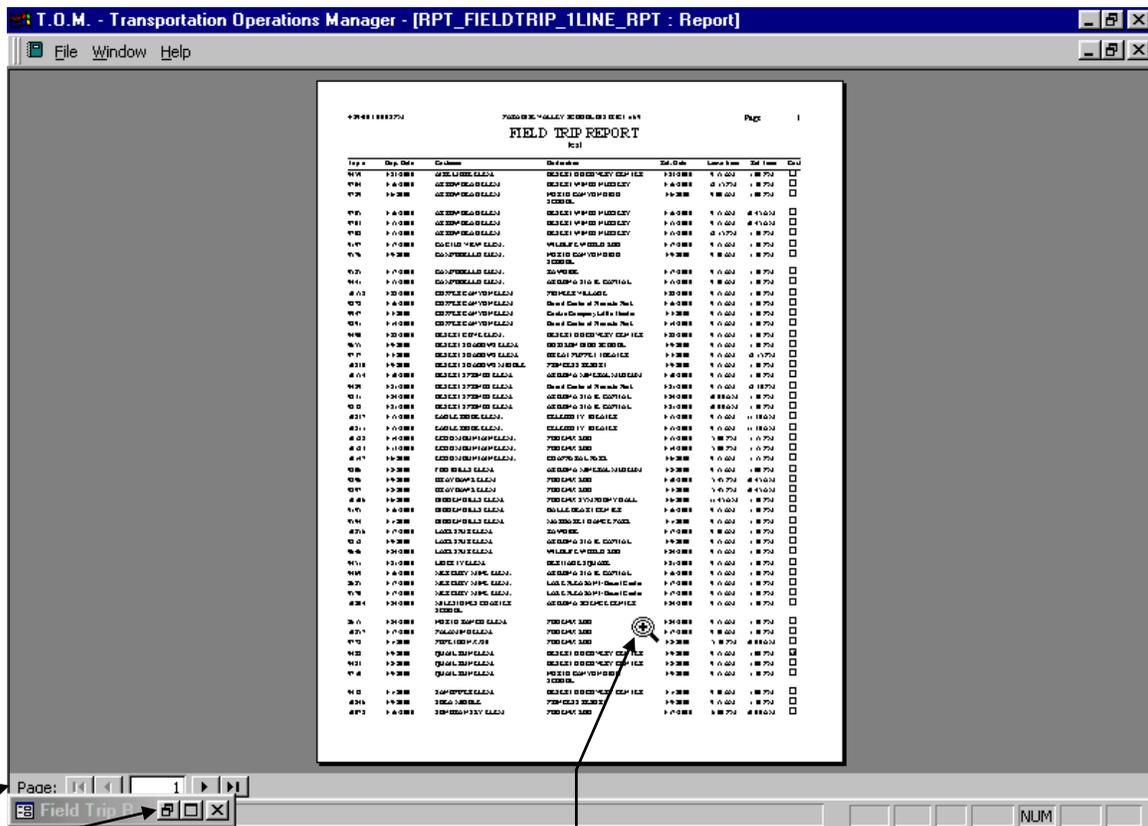


Previewing and Printing Management Reports

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 8-3.

- 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 8-2). 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 "X" 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 8-2), then click the Print button.



Click the Restore icon to return to the reports screen.

Figure 8-2. The Report Preview Screen

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.

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



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 Management Reports menu and then click the Field Trip Reports option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Field Trip Reports screen is displayed (Figure 8-3). 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 8-3), the Sorting tab (Figure 8-4) and the Records Selected tab (Figure 8-5). 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 8-3), 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 8-3. 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 to report on. This field is a drop down list box. If you don't know the number of the fund that you want to report on 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.

Don't worry if you don't know the fund number. T.O.M. gives you an easy way to lookup your fund by the fund name. To do this you click the Fund button. This causes the Fund Search Screen to appear. This screen will allow you to quickly search your existing funds by an alphabetical lookup. See *Chapter 3 – Entering Lookup Lists* in the *T.O.M. Getting Started Guide* for details about searching for funds.

Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer's number will appear in the Customer field. If you leave this field blank all customers will be selected for this report. Click the Customer button if you need to look up the customer using an alphabetical lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

Destination: You may select a specific destination to search your Field Trips by. For example, you may search all field trips requests for the city zoo. 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 look up your destination by the destination name (or description). To do this you click the Destination button. This causes the Destination Search Screen to appear. This screen will allow you to quickly search your existing destination by an alphabetic lookup. See *Chapter 8 – Destinations* in the *T.O.M. Getting Started Guide* for details about searching for 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 8-6 | 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 8-7 | 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 8-8 | This contains all information in 2 line report and then a third line of information. This third line includes the category, fund, internal |



| Report Name | Sample Report | Description |
|-------------|---------------|----------------------------------|
| | | #, vehicle types and capacities. |



| Report Name | Sample Report | Description |
|-------------------------------|---------------|--|
| 4 Line | Figure 8-9 | 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 8-10 | 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 8-11 | 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 8-12 | 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 8-13 | 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 8-14 | 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 8-15 | 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 8-16 | 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 8-17 | 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 8-4), 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.

| Selection / Title | Sorting | Records Selected |
|-------------------|----------------------------|-------------------------|
| | Sort by #1: Departure Date | Order By #1: Ascending |
| | Sort by #2: Customer | Order By #2: Descending |
| | Sort by #3: Division | Order By #3: Descending |

Use standard T.O.M. Report Formats:

ACCESS Format: RPT_FIELDTRIP_RPT

Build Employee Assignment Report Database:

Email Report:

Report to File:

Find All | Print | Preview | Exit

Figure 8-4. 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: T.O.M. allows you to use Microsoft Access 97 to customize many of T.O.M.'s reports. The 1, 2, 3 and 4 Line Field Trip Reports as well as the Field Trip Report with Employees and the Field Trip Report with Employees New Page for Each Day reports are all reports 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.

ACCESS Format: If you uncheck the Use Standard T.O.M. Reports Formats checkbox as described above, you can click the drop-down arrow and select from any of the available formats. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own 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 8-5), 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.

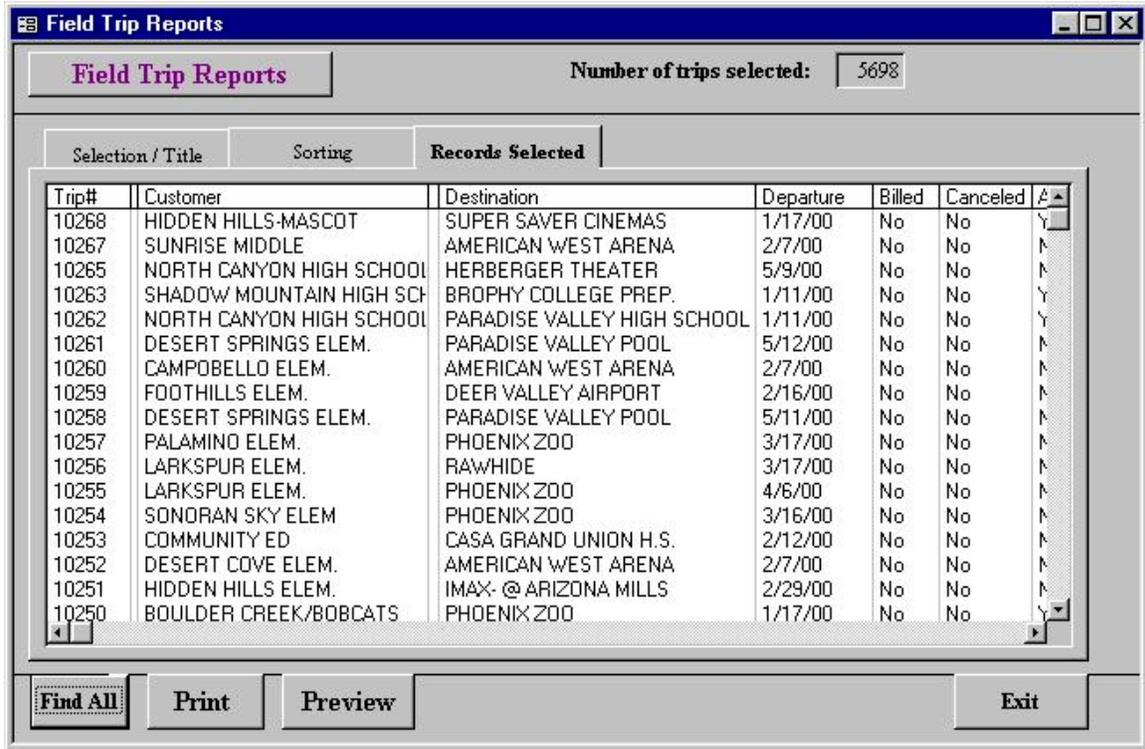


Figure 8-5. The Records Selected Tab on the Field Trip Reports Screen

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 8-5). See *Previewing and Printing Management Reports* previously described in this chapter for details.

Figure 8-6 through Figure 8-17 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 8-6. 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 8-7. 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 | |
| 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 8-8. 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 1:30 PM 20 1 | 1:30 PM 0 | <input type="checkbox"/> #Vh: <input type="checkbox"/> 2 <input type="checkbox"/> |
| MD | | | | | | | 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 | 12:00 PM 0 | <input type="checkbox"/> #Vh: <input type="checkbox"/> <input type="checkbox"/> 1 <input type="checkbox"/> |
| MD | | | | | | | 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 | 1:30 PM 0 | <input type="checkbox"/> #Vh: <input type="checkbox"/> 1 <input type="checkbox"/> |
| MD | | | | | | | 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 | 1:00 PM 0 | <input type="checkbox"/> #Vh: <input type="checkbox"/> 2 <input type="checkbox"/> |
| MD | | | | | | | 1 |

Figure 8-9. 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 / Time | Return Date | Customer | Destination / Purpose | LeaveTime/ Arrive Time | Ret. Time LeaveTime | # Veh D/R | Shtl |
|--------|---------------------------------|-------------|-------------------------------|-----------------------------------|---------------------------|------------------------|--------------|--------------------------|
| 9951 | Wednesday, December 08, 1999 | 4:30 PM | ALL SAINTS LUTHERAN CHURCH | NORTH PARK MOBILE HOME | 4:30 PM | 5:30 PM | | <input type="checkbox"/> |
| | Wednesday, December 08, 1999 | | Schedule: WD | | | | | <input type="checkbox"/> |
| | | | | | | Est. Driver Time: | 1.50 | |
| | | | DRIVER | VEHICLE # | SCHEDULE | DEST. LEG | | |
| | | | * 367 - GRIFFITH, DEAN | 127 | WD | | | |
| 9717 | Tuesday, December 07, 1999 | 9:15 AM | CACTUS VIEW ELEM. | ARIZONA STATE CAPITAL | 9:15 AM | 12:00 PM | | <input type="checkbox"/> |
| | 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 | 9:15 AM | CACTUS VIEW ELEM. | PHX LITTLE THEATER COOKIE CO. | 9:15 AM | 1:00 PM | | <input type="checkbox"/> |
| | Thursday, December 09, 1999 | | Schedule: MD | | | | | <input type="checkbox"/> |
| | | | | | | Est. Driver Time: | 4.25 | |
| | | | * CANCELED * | | | | | |
| | | | 11/16/1999 | | | | | |
| | | | * | | | | | |
| 9394 | Wednesday, December 08, 1999 | 9:30 AM | CACTUS VIEW ELEM. | SCOTTSDALE CENTER FOR THE ARTS | 9:30 AM | 1:30 PM | | <input type="checkbox"/> |
| | 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 | 9:15 AM | CACTUS VIEW ELEM. | PHX LITTLE THEATER COOKIE CO. | 9:15 AM | 1:30 PM | | <input type="checkbox"/> |
| | 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 8-10. The Field Trip Report With Drivers



| 2/22/00 2:46:34 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 |
| 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 8-11. The Field Trip Report With Drivers and Page Break on Each Day



5/16/00 3:19:00 PM Page: 1

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 8-12. 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 |
|----------------------------------|---------|----------|-----------|----------|--------------|-------------|-------------|------------|
| 101 - VILLAGE VISTA ELEM. | 11 | 0 | 908 | 169 | 1,077 | 75.25 | 1,030.00 | \$1,596.25 |
| 102 - VISTA VERDE MIDDLE | 1 | 0 | 51 | 5 | 56 | 4.00 | 60.00 | \$88.00 |
| 103 - WHISPERING WIND ELEM. | 9 | 0 | 602 | 94 | 696 | 57.75 | 888.00 | \$1,283.55 |
| 118 - BOULDER CREEK ELEM. | 1 | 0 | 60 | 6 | 66 | 3.50 | 26.00 | \$61.10 |
| 120 - BOULDER CREEK/BOBCATS | 1 | 0 | 130 | 15 | 145 | 14.00 | 122.00 | \$255.20 |
| 124 - EXPLORER MIDDLE | 2 | 0 | 939 | 25 | 964 | 59.50 | 830.00 | \$1,271.50 |
| 125 - DESERT TRAILS ELEM | 1 | 0 | 112 | 12 | 124 | 7.00 | 20.00 | \$103.00 |
| 140 - ALL SAINTS LUTHERAN CHURCH | 1 | 0 | 56 | 280 | 336 | 30.00 | 330.00 | \$945.00 |
| 154 - SANDPIPER- MASCOT | 2 | 0 | 122 | 22 | 144 | 9.25 | 122.00 | \$193.45 |
| 164 - GRAYHAWK ELEM | 7 | 0 | 516 | 56 | 572 | 34.25 | 594.00 | \$801.65 |
| 165 - TEMPLE BETH ISRAEL | 1 | 0 | 30 | 3 | 33 | 3.75 | 30.00 | \$101.25 |
| 177 - HIDDEN HILLS-MASCOT | 1 | 0 | 85 | 6 | 91 | 7.50 | 92.00 | \$152.70 |
| 187 - MILESTONES CHARTER SCHOOL | 2 | 0 | 127 | 20 | 147 | 8.75 | 110.00 | \$296.25 |

Figure 8-13. 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 8-14. 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 8-15. 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 8-16. 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 8-17. The Field Trip Grade Summary Report



Working With Field Trip Employee Reports

The Field Trip Employee reports is actually three different reports that you may select from a powerful report options screen. All of these reports list detail or summary field trip assignment information. At first glance this set of reports seems very similar to the Field Trip Reports and in fact they are similar in power and flexibility. The Field Trip Employee Reports will report on a deeper level of information than the field trip reports. While the field trip reports will print reports at the *field trip level* the Field Trip Employee Report will print reports at the *field trip assignment level*. This is an important distinction. A single field trip may have many employees and vehicles assigned to it. These reports will print information about each employee / vehicle assigned to those field trips.

To print Field Trip Employee Reports open the Reports menu, select the Management Reports menu and then click the Field Trip Employee Reports option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Field Trip Employee Reports screen is displayed (Figure 8-18). This screen offers you a 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 8-18), the Sorting tab (Figure 8-19) and the Records Selected tab (Figure 8-20). 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 Employee Reports screen (Figure 8-18), 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.

The screenshot shows a software window titled "Field Trip Employee Reports". At the top, there is a tab labeled "Field Trip Employee Reports" and a text field for "Number of trip Employees selected:". Below this, there are three tabs: "Selection / Title" (which is selected), "Sorting", and "Records Selected". The "Selection / Title" tab contains several search criteria fields:

- Departure Date Range: From: [] To: [] Dates: []
- Selected Trip#: [] Selected Schedule: [] Selected Fund: []
- Customer: []
- Destination: [] Selected Request #: []
- Selected Category: [] Selected Grade: []
- Selected Division: [] Selected Internal Number: []
- Checkboxes: Assigned, Unassigned, Billed, Unbilled, Canceled, Open
- What Report: [1 Line] Selected Employee: []
- Title: [] Selected Vehicle: []

At the bottom of the window, there are four buttons: "Find All", "Print", "Preview", and "Exit".

Figure 8-18. The Selection / Title Tab on the Field Trip Employee 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.

Selected Fund: You may select a specific fund to report on. This field is a drop down list box. If you don’t know the number of the fund that you want to report on 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.

Don’t worry if you don’t know the fund number. T.O.M. gives you an easy way to lookup your fund by the fund name. To do this you click the Fund button. This causes the Fund Search Screen to appear. This screen will allow you to quickly search your existing funds by an alphabetical lookup. See *Chapter 3 – Entering Lookup Lists* in the *T.O.M. Getting Started Guide* for details about searching for funds.

Customer: This is the customer number of a specific customer that you want to report on. If you don’t know the customer number click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer’s number will appear in the Customer field. If you leave this field blank all customers will be selected for this report. Click the Customer button if you need to look up the customer using an alphabetical lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

Destination: You may select a specific destination to search your Field Trips by. For example, you may search all field trips requests for the city zoo. 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 look up your destination by the destination name (or description). To do this you click the Destination button. This causes the Destination Search Screen to appear. This screen will allow you to quickly search your existing destination by an alphabetic lookup. See *Chapter 8 – Destinations* in the *T.O.M. Getting Started Guide* for details about searching for 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: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. 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: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. 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: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. to search for all field trips that have been billed.

Unbilled: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. to search for all field trips that have NOT been billed.

Canceled: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. to search for all field trips that have been canceled.

Open: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. 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 8-21 | This is a very simple report listing one line of basic information for each field trip. This includes the trip date, customer, destination, return date, leave time, return time, employee, cancel status and vehicle #. |
| 2 Line | Figure 8-22 | This contains all information in 1line report and then includes a second line of information. This second line includes contact, purpose, est. time, est. miles, # of students, # of adults, grade, vehicle description, actual miles and hours. |
| Employee Summary | Figure 8-23 | This report will summarize all selected field trip assignments by the drivers assigned to the field trips. The report will list the various drivers and summary field trip statistics for each driver. |
| Vehicle Summary | Figure 8-24 | This report will summarize all selected field trip assignments by the field trip vehicles assigned to the field trips. The report will list the various vehicles and summary field trip statistics for each vehicle. |
| Vehicle Type Summary | Figure 8-25 | This report will summarize all selected field trip assignments by the type of vehicle assigned to the field trips. The report will list the various vehicle types and summary field trip statistics for each vehicle type. |

Selected Employee: You may select a specific employee on which to report. Click on the down arrow to the right of the employee field to see a list of employees that you may select. Once you find the employee you desire click on it and it will automatically appear in the employee field.

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 Vehicle: You may search your field trips by the vehicles that you assigned to the trips. Click on the down arrow to the right of the vehicle field to see a list of vehicles that you may select. Once you find the vehicle you desire click on it and it will automatically appear in the vehicle field.

Entering Sort Criteria on the Sorting Tab

Click on the Sorting tab in the Field Trip Employee Reports screen (Figure 8-19), 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.

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).



Figure 8-19. The Sorting Tab on the Field Trip Employee Reports Screen

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 1 and 2 Line Field Trip Employee Reports are reports 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.

ACCESS Format: If you uncheck the Use Standard T.O.M. Reports Formats checkbox as described above, you can click the drop-down arrow and select from any of the available formats. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own 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 8-20), 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.

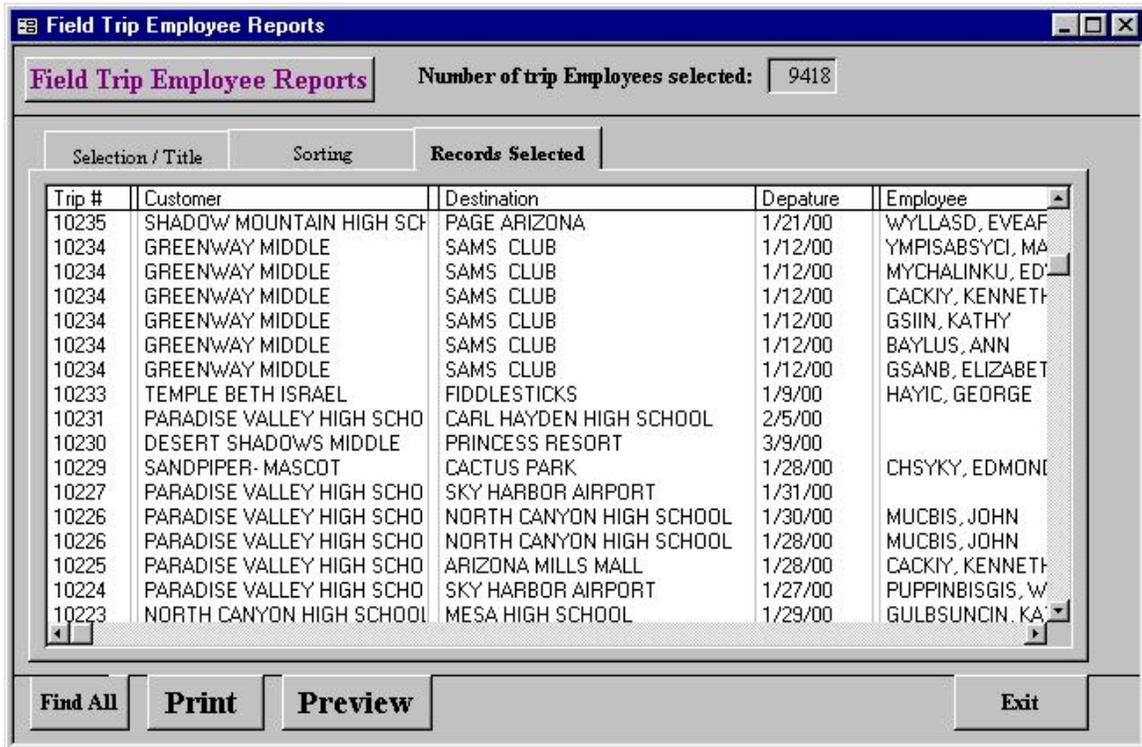


Figure 8-20. The Records Selected Tab on the Field Trip Employee Reports Screen

Previewing and Printing Field Trip Employee 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 8-20). See *Previewing and Printing Management Reports* previously described in this chapter for details.

Figure 8-21 through Figure 8-36 shows a list of samples the Field Trip Employee 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 Employee Reports.



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PARADISE VALLEY SCHOOL DISTRICT # 69
FIELD TRIP REPORT

| Trip # | Dep. Date | Pickup Destination | Drop off Destination | Ret. Date | Leave Time | Ret. Time | Employee | Cncl | Vehicle |
|--------------------|-----------|-----------------------------|-----------------------------|-----------|------------|-----------|----------------------------------|-------------------------------------|---------|
| 2/22/00 4:55:42 PM | | | | | | | | | |
| 9862 | 12/3/1999 | SPECIAL OLYMPICS | TUCSON | 12/5/1999 | 8:00 AM | 11:00 AM | 320 - VOGT, MICHAEL | <input type="checkbox"/> | 194 |
| 9862 | 12/4/1999 | SPECIAL OLYMPICS | TUCSON | 12/5/1999 | 8:00 AM | 11:00 AM | 320 - VOGT, MICHAEL | <input type="checkbox"/> | 194 |
| 9862 | 12/5/1999 | SPECIAL OLYMPICS | TUCSON | 12/5/1999 | 8:00 AM | 11:00 AM | 320 - VOGT, MICHAEL | <input type="checkbox"/> | 194 |
| 9993 | 12/6/1999 | FOOTHILLS ELEM. | BANK ONE BUILDING | 12/6/1999 | 9:15 AM | 1:30 PM | 334 - GREEN, BENDRAMINA | <input type="checkbox"/> | 205 |
| 9436 | 12/6/1999 | GREENWAY MIDDLE | LIFE CARE CENTER | 12/6/1999 | 9:30 AM | 12:45 PM | 272 - WEISENBURGER, KIM | <input type="checkbox"/> | 207 |
| 10065 | 12/6/1999 | LARKSPUR ELEM. | MENDOZA ELEMENTARY | 12/6/1999 | 9:30 AM | 1:00 PM | 409 - ROSENBERG, BARRY | <input type="checkbox"/> | 99 |
| 10065 | 12/6/1999 | LARKSPUR ELEM. | MENDOZA ELEMENTARY | 12/6/1999 | 9:30 AM | 1:00 PM | 367 - GRIFFITH, DEAN | <input type="checkbox"/> | 158 |
| 9711 | 12/6/1999 | GRAYHAWK ELEM | ARIZONA STATE CAPITAL | 12/6/1999 | 9:45 AM | 1:15 PM | 152 - GULBRONSEN, KATHY | <input type="checkbox"/> | 182 |
| 9711 | 12/6/1999 | GRAYHAWK ELEM | ARIZONA STATE CAPITAL | 12/6/1999 | 9:45 AM | 1:15 PM | 328 - LEGG, HENRY | <input type="checkbox"/> | 187 |
| 9700 | 12/6/1999 | EXPLORER MIDDLE | HYATT REGENCY GAINNEY RANCH | 12/6/1999 | 11:00 AM | 1:15 PM | 298 - ROCK, BRIAN | <input type="checkbox"/> | 173 |
| 9700 | 12/6/1999 | EXPLORER MIDDLE | HYATT REGENCY GAINNEY RANCH | 12/6/1999 | 11:00 AM | 1:15 PM | 330 - ARCHER, NEWTON | <input type="checkbox"/> | 150 |
| 9972 | 12/6/1999 | HORIZON HIGH SCHOOL | Tempe Sports Complex | 12/6/1999 | 2:00 PM | 8:00 PM | 347 - THOMPSON-SEVERSON, DEBORAH | <input type="checkbox"/> | 204 |
| 10005 | 12/6/1999 | HORIZON HIGH SCHOOL | BENEDICT FIELD | 12/6/1999 | 2:00 PM | 7:30 PM | 351 - GRANT, ELIZABETH | <input type="checkbox"/> | 102 |
| 9939 | 12/6/1999 | NORTH CANYON HIGH SCHOOL | BENEDICT FIELD | 12/6/1999 | 2:15 PM | 5:30 PM | 238 - LEITNER, JANICE | <input type="checkbox"/> | 101 |
| 10126 | 12/6/1999 | PARADISE VALLEY HIGH SCHOOL | Tempe Sports Complex | 12/6/1999 | 2:15 PM | 6:00 PM | 93 - THOMSON, SANDRA | <input type="checkbox"/> | 190 |
| 10037 | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL | CESAR CHAVEZ HIGH SCHOOL | 12/6/1999 | 2:30 PM | 7:00 PM | 40 - TAYLOR, ANN | <input type="checkbox"/> | 175 |
| 9889 | 12/6/1999 | WHISPERING WIND ELEM. | HORIZON HIGH SCHOOL | 12/6/1999 | 3:20 PM | 4:30 PM | 33 - GIBEAU, MARGARET | <input type="checkbox"/> | 164 |
| 10049 | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL | Tempe Sports Complex | 12/6/1999 | 4:00 PM | 7:30 PM | | <input checked="" type="checkbox"/> | |
| 10076 | 12/6/1999 | NORTH CANYON HIGH SCHOOL | Tempe Sports Complex | 12/6/1999 | 4:00 PM | 9:00 PM | 22 - IMPERATRICE, MARJORIE | <input type="checkbox"/> | 142 |
| 10021 | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL | Tempe Sports Complex | 12/6/1999 | 4:30 PM | 8:00 PM | 334 - GREEN, BENDRAMINA | <input type="checkbox"/> | 205 |
| 10053 | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL | BENEDICT FIELD | 12/6/1999 | 4:30 PM | 6:00 PM | 361 - CASKEY, KENNETH | <input type="checkbox"/> | 147 |
| 9717 | 12/7/1999 | CACTUS VIEW ELEM. | ARIZONA STATE CAPITAL | 12/7/1999 | 9:15 AM | 12:00 PM | 173 - BELICH, ARTHUR | <input type="checkbox"/> | 196 |
| 9717 | 12/7/1999 | CACTUS VIEW ELEM. | ARIZONA STATE CAPITAL | 12/7/1999 | 9:15 AM | 12:00 PM | 347 - THOMPSON-SEVERSON, DEBORAH | <input type="checkbox"/> | 204 |

Figure 8-21. The 1 Line Trip Employee Report



PARADISE VALLEY SCHOOL DISTRICT # 69
FIELD TRIP REPORT

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2/22/00 5:05:52 PM

| Trip # / Contact | Dep. Date | Pickup Destination / Purpose | Drop off Destination / Est. Time | Est. Miles | Ret. Date / # of Stud. | Leave/Time / # of Adults | Ret Time / Grade | Employee / Vehicle | Cnel Shdl | Act. Miles Act. Hrs |
|---------------------|-----------|--|--|------------|------------------------|--------------------------|------------------|--|-------------------------------------|----------------------|
| 10037 John Speer | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL G BKB | CESAR CHAVEZ HIGH SCHOOL 5:00 | 0.00 | 12/6/1999 30 | 2:30 PM 4 | 7:00 PM | 40 - TAYLOR, ANN 175 - TRANSIT | <input type="checkbox"/> | 62.0 4.25 |
| 9889 | 12/6/1999 | WHISPERING WIND ELEM. Dress Rehears w/Hor Choru | HORIZON HIGH SCHOOL 1:50 | 28.00 | 12/6/1999 40 | 3:20 PM 4 | 4:30 PM | 33 - GIBEAU, MARGARET 164 - TRANSIT | <input type="checkbox"/> | 14.0 1.25 |
| 10049 John Speer | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL G Soccer Tournament | Tempe Sports Complex 4:00 | 0.00 | 12/6/1999 30 | 4:00 PM 2 | 7:30 PM | | <input checked="" type="checkbox"/> | 0.0 0.00 |
| 10076 | 12/6/1999 | NORTH CANYON HIGH SCHOOL | Tempe Sports Complex | | 12/6/1999 | 4:00 PM | 9:00 PM | 22 - IMPERATRICE, MARJORIE | <input type="checkbox"/> | 66.0 |
| SCOTT BROWN | 12/6/1999 | FIESTA BOWL SOCCER TOURN | 5:50 | 95.00 | 20 | 3 | 142 - TRANSIT | | <input type="checkbox"/> | 4.50 |
| 10021 | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL | Tempe Sports Complex | | 12/6/1999 | 4:30 PM | 8:00 PM | 334 - GREEN, BENDRAMINA | <input type="checkbox"/> | 172.0 |
| John Speer | | G- Soccer Tournament | 6:00 | 50.00 | 40 | 2 | 205 - AM TRAN | | <input type="checkbox"/> | 18.75 |
| 10053 | 12/6/1999 | SHADOW MOUNTAIN HIGH SCHOOL | BENEDICT FIELD | | 12/6/1999 | 4:30 PM | 6:00 PM | 361 - CASKEY, KENNETH | <input type="checkbox"/> | 133.0 |
| John Speer | | Boys Soccer Tournament | 4:00 | 50.00 | 40 | 2 | 147 - TRANSIT | | <input type="checkbox"/> | 11.00 |
| 9717 | 12/7/1999 | CACTUS VIEW ELEM. | ARIZONA STATE CAPITAL 3:25 | 55.00 | 12/7/1999 120 | 9:15 AM 12 | 12:00 PM | 173 - BELICH, ARTHUR 196 - | <input type="checkbox"/> | 43.0 3.00 |
| Sandra Cox | | CACTUS VIEW ELEM. | ARIZONA STATE CAPITAL 3:25 | 55.00 | 12/7/1999 | 9:15 AM | 12:00 PM | 347 - THOMPSON-SEVERSON, DEBORA | <input type="checkbox"/> | 43.0 |
| 9902 | 12/7/1999 | DESERT SHADOWS MIDDLE Community Service | MARICOPA COUNTY HOSPITAL 3:25 | 0.00 | 12/7/1999 24 | 9:15 AM 4 | 12:00 PM | 204 - AM TRAN 197 - MERKLE, ALAN 177 - | <input type="checkbox"/> | 3.00 48.0 3.00 |
| 9949 | 12/7/1999 | INDIAN BEND ELEM. | IMAX - @ ARIZONA MILLS 4:75 | 70.00 | 12/7/1999 75 | 9:15 AM 15 | 1:30 PM | 202 - LANGLEE, JAMES 157 - TRANSIT | <input type="checkbox"/> | 52.0 4.75 |
| FARRELL | | INDIAN BEND ELEM. | IMAX - @ ARIZONA MILLS 4:75 | 70.00 | 12/7/1999 75 | 9:15 AM 15 | 1:30 PM | 187 - McCURDY, DOROTHY 178 - | <input type="checkbox"/> | 53.0 4.75 |
| 9435 | 12/7/1999 | GREENWAY MIDDLE Choir | PHX MTN. VILL. NURSING HOME 4:00 | 20.00 | 12/7/1999 35 | 9:30 AM 3 | 12:45 PM | 115 - SAUNDERS, SUSAN 111 - TRANSIT | <input type="checkbox"/> | 18.0 3.50 |
| Rick Ross | | ECHO MOUNTAIN ELEM. | SCOTTSDALE CENTER FOR THE ARTS 4:25 | 55.00 | 12/7/1999 104 | 9:45 AM 16 | 1:30 PM | 422 - MUSTER, JOHN 128 - TRANSIT | <input type="checkbox"/> | 56.0 4.00 |
| 9365 | 12/7/1999 | ECHO MOUNTAIN ELEM. | SCOTTSDALE CENTER FOR THE ARTS 4:25 | 55.00 | 12/7/1999 104 | 9:45 AM 16 | 1:30 PM | 422 - MUSTER, JOHN 128 - TRANSIT | <input type="checkbox"/> | 56.0 4.00 |
| Jacque Weiss | | ECHO MOUNTAIN ELEM. | SCOTTSDALE CENTER FOR THE ARTS 4:25 | 55.00 | 12/7/1999 104 | 9:45 AM 16 | 1:30 PM | 422 - MUSTER, JOHN 128 - TRANSIT | <input type="checkbox"/> | 56.0 4.00 |

Figure 8-22. The 2 Line Field Trip Employee Report



| Employee | # Trips | Total Hours | Total Miles |
|-------------------------------------|--------------|------------------|-------------------|
| ROSENBERG, BARRY - 409 | 22 | 108.00 | 1,211.00 |
| RUZICH, JILL - 123 | 6 | 46.50 | 413.00 |
| SAARI, DAVID - 198 | 14 | 90.50 | 904.00 |
| SAUNDERS, SUSAN - 115 | 31 | 157.50 | 1,819.00 |
| SCHWARTZLOW, LaJAUANA - 353 | 6 | 13.25 | 173.00 |
| SCHWEITZER, SHOSHANA - 392 | 10 | 41.75 | 442.00 |
| SEDEERS, RANDY - 331 | 8 | 25.25 | 263.00 |
| SHRIKI, EDMOND - 98 | 70 | 301.50 | 3,234.00 |
| SMITH, TERRI - 387 | 39 | 194.50 | 1,612.00 |
| STOLLSTEIMER, SUSAN - 65 | 5 | 41.40 | 31,394.00 |
| STRATTON, VICKI - 356 | 27 | 97.00 | 1,025.00 |
| SWATZELL, ALISA GAYLE - 403 | 13 | 74.50 | 938.00 |
| TANK Jr., HENRY - 380 | 46 | 199.25 | 2,293.00 |
| TAYLOR, ANN - 40 | 30 | 122.75 | 1,312.00 |
| THOMPSON-SEVERSON, DEBORAH - 347 | 54 | 228.00 | 2,664.00 |
| THOMSON, SANDRA - 93 | 53 | 240.00 | 2,431.00 |
| TOMLINSON, GERALD - 245 | 35 | 135.00 | 1,367.00 |
| TURNER, JOHN - 384 | 41 | 259.50 | 2,292.00 |
| VOGT, DONNA - 56 | 1 | 11.75 | 0.00 |
| VOGT, MICHAEL - 320 | 28 | 120.75 | 1,501.00 |
| WATKINS, NEVILLE - 144 | 3 | 42.25 | 362.00 |
| WATSON, TAMA - 88 | 2 | 8.25 | 168.00 |
| WEISENBURGER, KIM - 272 | 109 | 419.75 | 4,534.00 |
| WILLARD, EVEARD - 192 | 15 | 115.50 | 1,223.00 |
| WIND, JAMES - 215 | 50 | 187.00 | 2,060.00 |
| YORK, PAUL - 127 | 7 | 32.00 | 206.00 |
| ZYADAT, NABIL - 131 | 56 | 238.00 | 2,456.00 |
| Report Totals: | 3,381 | 16,341.12 | 198,050.00 |

Figure 8-23. The Employee Summary Report



2/22/00 5:12:46 PM PARADISE VALLEY SCHOOL DISTRICT # 69 Page: 3

FIELD TRIP VEHICLE SUMMARY REPORT

| Vehicle | # Trips | Total Hours | Total Miles |
|------------------------------|---------|-------------|-------------|
| 191 - SAFE-T-LINER - Transit | 17 | 71.75 | 753.00 |
| 192 - - Transit | 26 | 113.00 | 1,099.00 |
| 193 - - Transit | 38 | 173.50 | 1,420.00 |
| 194 - - Transit | 26 | 107.50 | 1,371.00 |
| 195 - SAF-T-LINER - Transit | 19 | 118.00 | 1,321.00 |
| 196 - - Transit | 62 | 273.50 | 2,603.00 |
| 197 - - Transit | 60 | 261.00 | 2,697.00 |
| 198 - SAF-T-LINER - Transit | 18 | 72.00 | 626.00 |
| 199 - - Transit | 57 | 238.00 | 2,085.00 |
| 200 - AM TRAN - Transit | 5 | 21.00 | 213.00 |
| 201 - AM TRAN - Transit | 2 | 10.75 | 83.00 |
| 203 - AM TRAN - Transit | 19 | 73.25 | 802.00 |
| 204 - AM TRAN - Transit | 38 | 160.75 | 1,970.00 |
| 205 - AM TRAN - Transit | 33 | 143.00 | 1,635.00 |
| 206 - AM TRAN - Transit | 1 | 1.25 | 15.00 |
| 207 - AM TRAN - Transit | 32 | 117.00 | 1,301.00 |
| 30 - - Wheelchair small | 2 | 8.25 | 168.00 |
| 32 - - Wheelchair small | 1 | 0.00 | 0.00 |

Figure 8-24. The Vehicle Summary Report

2/22/00 8:01:12 PM PARADISE VALLEY SCHOOL DISTRICT # 69 Page: 1

FIELD TRIP VEHICLE TYPE SUMMARY REPORT

| Vehicle Type | # Trips | Total Hours | Total Miles |
|-----------------------|------------|-------------|--------------|
| 1 - Transit | 203 | 6.00 | 60.00 |
| 4 - Wheelchair large | 1 | 0.00 | 0.00 |
| 6 - OFFICE | 2 | 0.00 | 0.00 |
| Report Totals: | 206 | 6.00 | 60.00 |

Figure 8-25. The Vehicle Type Summary Report



Working with the Trip Comments Report

The Field Trip Comments Report (Figure 8-27) was designed to give the Transportation Department the ability to recall the various comments that the field trip drivers have logged over a period of time. For example, the Field Trip Comments Report can be used to assist the Transportation Department in diagnosing a problem customer and presenting a more specific list of past problems to that customer. You can select a specific customer for which to print field trip comments as well as a range of dates.

The Field Trip Comments Report contains the following information:

- The selected customer name.
- The user specified date range.
- The field trip number of the field trip where the comment was logged.
- The destination description of the field trip where the comment was logged.
- The date of departure of the field trip where the comment was logged.
- The comment that was logged against the field trip.

To print the Trip Comments Report, select the Management Reports menu and then click the Trip Comments Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Trip Comments Report screen is displayed (Figure 8-26).

The screenshot shows a software window titled "Comments Report". The window has a blue title bar with a close button in the top right corner. Below the title bar, the text "Comments Report" is displayed in a purple font. The main content area is light gray and contains several input fields and buttons. On the left, there is a "Selected Customer:" label followed by a dropdown menu and a text input field. Below this is a "Trip Departure Date Range:" label followed by two date pickers (each with a calendar icon) and a "Dates:" dropdown menu. To the right of these fields are two checkboxes: "Email Report:" and "Report to File:". At the bottom of the window, there are three buttons: "Print", "Preview", and "Cancel".

Figure 8-26. Trip Comments Report Screen

This screen allows you to select a customer and/or a departure date range. 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 Management Reports* previously described in this chapter for details.) Figure 8-27 shows a sample report.

Selected Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number then click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer's



number will appear in the Customer field. If you leave this field blank all customers will be selected for this report.

Trip 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.

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.



2/22/00 8:12:39 PM

PARADISE VALLEY SCHOOL DISTRICT # 69

PAGE:

1

Trip Comments Report

Selected Customer Name:

Selected Date Range: 5/12/2000 — 5/15/2000

| Field Trip # | Destination/ Customer | Date of Departure | Comments |
|--------------|--|----------------------|--|
| 9319 | ARIZONA SPORTS RANCH CACTUS VIEW ELEM. | 5/12/2000 | Parent helpers were upset with driver when driver did not let kids bring snacks on the bus. |
| 10261 | PARADISE VALLEY POOL DESERT SPRINGS ELEM. | 5/12/2000 | Bus was suppose to depart from destination at 12:30PM instead teacher had class go on hay ride at 12:30PM and didn't get kids back until 1:30PM. Driver missed afternoon routes. |
| 9053 | DEER VALLEY POOL FOOTHILLS ELEM. | 5/12/2000 | Driver arrived on time but students took 1/2 hour to get ready to depart. Driver, therefore, missed midday run. |
| 9044 | MELROSE PARADISE REC. CLUB LIBERTY ELEM. | 5/12/2000 | Kids throwing objects in bus while bus was moving - no teacher attempt to control. |
| 9335 | Bowling / Bell Rd VILLAGE VISTA ELEM. | 5/12/2000 | Driver almost left some kids behind because teacher did not take roll before telling driver to leave. |

Figure 8-27. The Trip Comments Report



Working with the Hours Report

The Hours Report (Figure 8-29) was designed to give a list of all employee hours summarized by each day of the week. The hours in this report can either be a driver's route hours or the normal hours worked by an hourly employee.

The Hours Report can be used by the Transportation Department as an hourly payroll report that can be given to the district office. This report even includes a signature line and effective date at the bottom to be filled out by the Transportation Manager.

The Hours Report includes the following information:

- The employee's last name.
- The employee's first name.
- The employee's social security number.
- The employee's hours worked for each day of the week (Mon. - Sun.).
- The total hours worked for the week for each employee.
- A signature line on each page to be used by the Transportation Manager.
- An effective date on each page to be used by the Transportation Manager.

To print the Hours Report, select the Management Reports menu and then click the Hours Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Hours Report screen is displayed (Figure 8-28).



Figure 8-28. Hours Report Screen

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.

This report will list the employee hours that were entered when maintaining the employee information. This report will list these hours for every active employee in the employee file. There are no selection options to choose on this screen. Click the Print button to print the report or the Preview button to view the



report on the screen. (See *Previewing and Printing Management Reports* previously described in this chapter for details.) Figure 8-29 shows a sample report.

| EMPLOYEE | | | TOTAL HOURS | | | | | | | | |
|-----------------|------------|-----------------|-------------|------|------|------|------|------|------|-------|--|
| LAST NAME | FIRST NAME | SOCIAL SECURITY | MON | TUE | WED | THU | FRI | SAT | SUN | TOTAL | |
| ALIXANDIS | LILLIAN | 768-98-6069 | 7.25 | 7.25 | 7.25 | 7.25 | 7.25 | 0.00 | 0.00 | 36.25 | |
| ALLIN | ANITA | 780-88-7789 | 6.75 | 6.75 | 6.75 | 6.75 | 6.75 | 0.00 | 0.00 | 33.75 | |
| ASCHIS | NEWTON | 077-67-8097 | 6.00 | 6.00 | 6.00 | 6.00 | 6.00 | 0.00 | 0.00 | 30.00 | |
| BALLYNGIS | JOYCE | 807-90-0969 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| BANK JS. | HENRY | 076-80-9066 | 7.50 | 7.50 | 7.50 | 7.50 | 7.50 | 0.00 | 0.00 | 37.50 | |
| BASBANU | JON | 068-09-9097 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| BASBANU | SHARON | 066-60-9778 | 7.25 | 7.25 | 6.00 | 7.25 | 7.25 | 0.00 | 0.00 | 35.00 | |
| BASS | ROZALINA | 000-87-6880 | 8.00 | 8.00 | 5.75 | 8.00 | 8.00 | 0.00 | 0.00 | 37.75 | |
| BAYLUS | ANN | 099-88-7607 | 7.75 | 7.75 | 7.75 | 7.75 | 7.75 | 0.00 | 0.00 | 38.75 | |
| BHUMAC | LA DONNA | 008-96-0766 | 7.00 | 7.00 | 7.00 | 7.00 | 7.00 | 0.00 | 0.00 | 35.00 | |
| BHUMAC | RHONDA | 690-09-8987 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| BHUMCUN | SANDRA | 767-86-8686 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| BHUMPCUN-CIVISC | DEBORAH | 909-70-8806 | 7.50 | 8.50 | 7.50 | 8.50 | 5.75 | 0.00 | 0.00 | 37.75 | |
| BICK | DAVID | 869-66-9069 | 6.75 | 6.75 | 5.75 | 6.75 | 6.75 | 0.00 | 0.00 | 32.75 | |
| BICK | PATRICIA | 077-98-9698 | 7.50 | 7.50 | 5.75 | 7.50 | 7.50 | 0.00 | 0.00 | 35.75 | |
| BILL | PAULINE | 888-89-0966 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| BILYCH | ARTHUR | 877-76-0787 | 5.50 | 5.50 | 5.50 | 5.50 | 5.50 | 0.00 | 0.00 | 27.50 | |
| BLAKILY | ANITA | 077-76-7097 | 7.25 | 7.25 | 7.25 | 7.25 | 7.25 | 0.00 | 0.00 | 36.25 | |
| BLUCCIS | DENISE | 606-07-8708 | 4.50 | 4.50 | 4.50 | 4.50 | 4.50 | 0.00 | 0.00 | 22.50 | |
| BSADFUSD | PENNY | 076-78-0769 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| BSANNUCH | SHIRLEE | 076-06-7969 | 7.25 | 7.25 | 7.25 | 7.25 | 7.25 | 0.00 | 0.00 | 36.25 | |
| BSIWIS | DEBRA | 076-60-6990 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| BSUCABU | CHARLOTTE | 077-66-0986 | 5.25 | 5.25 | 5.25 | 5.25 | 5.25 | 0.00 | 0.00 | 26.25 | |
| BSUWN | TERRI | 087-60-8878 | 7.25 | 7.25 | 6.25 | 7.25 | 7.25 | 0.00 | 0.00 | 35.25 | |
| BUMLYNCUN | GERALD | 806-76-9867 | 6.00 | 6.00 | 6.00 | 6.00 | 6.00 | 0.00 | 0.00 | 30.00 | |
| BUSNIS | JOHN | 880-96-0677 | 7.25 | 7.25 | 7.25 | 7.25 | 7.25 | 0.00 | 0.00 | 36.25 | |
| BUSNIS | THERESA | 066-99-8809 | 6.50 | 6.50 | 6.50 | 6.50 | 6.50 | 0.00 | 0.00 | 32.50 | |
| BUSSIGSUCCA | JAMES | 608-78-7896 | 7.00 | 7.00 | 7.00 | 7.00 | 7.00 | 0.00 | 0.00 | 35.00 | |
| BUSZUNI | LINDA | 606-80-9098 | 7.00 | 7.00 | 6.00 | 7.00 | 7.00 | 0.00 | 0.00 | 34.00 | |
| BUYLI | LORI | 008-08-7089 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| CAASY | DAVID | 970-09-9997 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| CACI | KATHLEEN | 898-07-8077 | 6.75 | 6.75 | 6.75 | 6.75 | 6.75 | 0.00 | 0.00 | 33.75 | |
| CAKCIY | KENNETH | 690-06-7780 | 7.50 | 7.50 | 7.50 | 7.50 | 7.50 | 0.00 | 0.00 | 37.50 | |
| CALACIK | ED | 799-87-7899 | 6.50 | 6.50 | 6.50 | 6.50 | 6.50 | 0.00 | 0.00 | 32.50 | |
| CANU | SANDRA | 909-06-6807 | 7.00 | 7.00 | 7.00 | 7.00 | 7.00 | 0.00 | 0.00 | 35.00 | |
| CAUNDISC | SUSAN | 670-80-9680 | 6.75 | 6.75 | 6.75 | 6.75 | 6.75 | 0.00 | 0.00 | 33.75 | |
| CBUHAN | JANET | 880-99-8780 | 8.25 | 8.25 | 6.75 | 8.25 | 8.25 | 0.00 | 0.00 | 39.75 | |
| CBULLCBIYMIS | SUSAN | 076-89-9706 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| CCHUBISB | LEMOINE | 009-98-0990 | 7.75 | 7.75 | 6.25 | 7.75 | 7.75 | 0.00 | 0.00 | 37.25 | |
| CCHWASBZ CS. | GERALD | 889-77-8907 | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 | |
| CCHWASBZLUW | LaJAUANA | 076-67-8997 | 7.75 | 7.75 | 7.75 | 7.75 | 7.75 | 0.00 | 0.00 | 38.75 | |

SIGNATURE

EFFECTIVE DATE



Figure 8-29. The Hours Report



Working with the Driver Activity Report

The Driver Activity Report (Figure 8-31) was designed to give both the Transportation Department and each driver a tool that will show a detailed log of all field trips taken, refused and canceled for a given date range. This management tool allows the Transportation Department to quickly answer any questions or concerns that a driver may have about his / her allotment of assigned field trips over a given period of time.

The Driver Activity Report lists the following information:

- Selected date range.
- Selected driver (can be all drivers).
- Driver name.
- A detailed list of field trips taken for each driver for each user defined schedule. These field trips are listed in chronological order. The following information is listed for each field trip:
 - » Schedule assigned to field trip.
 - » Departure date of field trip.
 - » Field Trip Number.
 - » Customer requesting field trip.
 - » Driver hours for field trip.
- Total field trips taken per driver per user defined schedule.
- Total overall field trips taken by that driver.
- A detail list of field trips refused for each driver for each user defined schedule. These field trips are listed in chronological order. The following information is listed for each field trip refused by the driver:
 - » Schedule assigned to field trip.
 - » Departure date of field trip.
 - » Field Trip Number.
 - » Customer requesting field trip.
- Total field trips refused per driver per user-defined schedule.
- Total overall field trips refused by that driver.
- A detail list of field trips canceled for each driver for each user defined schedule. These field trips are listed in chronological order. The following information is listed for each field trip canceled by the driver:
 - » Schedule assigned to field trip.
 - » Departure date of field trip.
 - » Field Trip Number.
 - » Customer requesting field trip.
 - » Number of the field trip that replaced the canceled field trip (if the canceled field trip has been replaced).

You can run this report for a single driver or for all drivers. You can specify a range of dates for this report to list detailed driver information.

To print the Driver Activity Report, select the Management Reports menu and then click the Driver Activity Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Driver Activity Report screen is displayed (Figure 8-30).



The screenshot shows a software window titled "DRIVER ACTIVITY REPORT". Inside the window, there is a large heading "Driver Activity Report" in purple. Below the heading, there are several input fields and checkboxes. The "Date Range:" field contains two date pickers, both showing "6/30/2003", separated by a minus sign. To the right is a "Dates:" dropdown menu. Below that is an "Employee (blank for all):" dropdown menu. There are two checkboxes: "Show estimate time of refusals:" and "Email Report:". Below the checkboxes are three buttons: "Print", "Preview", and "Cancel".

Figure 8-30. Driver Activity Report Screen

This screen allows you to select an employee and/or date range. 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 Management Reports* previously described in this chapter for details.) Figure 8-31 shows a sample report.

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.

Employee (blank for all): Leave this field blank to include all employees in the report for the selected field trips or select a specific employee. If you know the number of the employee then enter it here or select it from the drop-down list which lists the employees alphabetically by name.

Show estimate time of refusals: If you check this checkbox the estimated hours for those trips where the driver refused the trip is also printed.

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 7:56:48 AM | PARADISE VALLEY SCHOOL DISTRICT # 69 | Page: 12 | |
| DRIVER ACTIVITY REPORT | | | |
| Selected Date Range: 1/1/1999 — 12/31/1999 | | Selected Driver: ALL | |
| DRIVER: <u>BALLYNGIS</u> | <u>JOYCE</u> | | |
| TRIPS TAKEN: | | | |
| <u>SCHEDULE</u> | <u>TRIP DATE</u> | <u>TRIP #</u> <u>CUSTOMER</u> | <u>HOURS</u> |
| MD | 1/14/1999 | 7029 NORTH RANCH/WRANGLERS | 1 |
| <i>TOTAL SCHEDULE: COUNT: 1</i> | | | 1 |
| wd | 1/8/1999 | 7561 HORIZON HIGH SCHOOL | 6.25 |
| wd | 1/26/1999 | 7734 SHADOW MOUNTAIN HIGH SCHOOL | 4.25 |
| wd | 4/8/1999 | 8306 HORIZON HIGH SCHOOL | 3 |
| wd | 5/12/1999 | 8667 DESERT SHADOWS MIDDLE | 3.25 |
| <i>TOTAL SCHEDULE: COUNT: 4</i> | | | 16.75 |
| <i>TOTAL EMPLOYEE: COUNT: 5</i> | | | 17.75 |
| REFUSALS: | | | |
| <u>SCHEDULE</u> | <u>TRIP DATE</u> | <u>TRIP #</u> <u>CUSTOMER</u> | <u>HOURS</u> |
| WD | 9/10/1999 | 9373 SHADOW MOUNTAIN HIGH SCHOOL | 6.5 |
| WD | 9/7/1999 | 9026 NORTH CANYON HIGH SCHOOL | 5.25 |
| WD | 4/15/1999 | 8339 PARADISE VALLEY HIGH SCHOOL | 5 |
| WD | 3/17/1999 | 8070 NORTH CANYON HIGH SCHOOL | 4 |
| WD | 3/3/1999 | 8250 PARADISE VALLEY HIGH SCHOOL | 5.5 |
| <i>TOTAL SCHEDULE: COUNT: 5</i> | | | 26.25 |
| WE | 4/24/1999 | 8328 HORIZON HIGH SCHOOL | 5 |
| WE | 2/27/1999 | 8231 AMERICAN CANCER SOCIETY | 10 |
| <i>TOTAL SCHEDULE: COUNT: 2</i> | | | 15 |
| <i>TOTAL EMPLOYEE: COUNT: 7</i> | | | 41.25 |
| CANCELLATIONS: | | | |
| <u>SCHEDULE</u> | <u>TRIP DATE</u> | <u>TRIP #</u> <u>CUSTOMER</u> | <u>REPLACEMENT TRIP #</u> |
| WD | 4/6/1999 | 8493 HORIZON HIGH SCHOOL | 8306 |
| WD | 9/1/1999 | 9016 NORTH CANYON HIGH SCHOOL | 9026 |

Figure 8-31. The Driver Activity Report



Working with the Driver Report

The Driver Report (Figure 8-33) is an excellent management tool that allows the Transportation Department to view overall field trip allocation for all drivers and to communicate that allocation to the drivers. This report's nickname is the "Gossip Report" because it is meant to end all gossip about which driver received which field trip.

A major benefit to the Driver Report is that it provides the Transportation Department a credible detailed report that can substantiate the Transportation Department's fair and impartial allotment of field trips to all drivers. This report can be posted in the employee area for all drivers to inspect and verify the fairness of field trip assignment.

This report has two major sections:

- The detailed driver section listing information for each driver
- The summary section listing overall report total and average information.

The drivers can compare their detailed field trip statistics in the detail section with the report summary field trip statistics in the summary section (or other driver's field trip statistics in the detailed section).

The Detailed Section of the Driver Report lists the following:

- Selected report date range.
- A summary of all field trip activity for each driver and each schedule. This summary contains the following information:
 - » Employee number.
 - » Employee first name.
 - » Employee last name.
 - » Schedule.
 - » Total field trips taken for that employee for that schedule within the report date range.
 - » Total field trips refused by that employee for that schedule within the report date range.
 - » Total field trips that have been assigned to that employee for that schedule within the report date range that have not yet been driven by the driver.
 - » Total field trips offered to that employee for that schedule within the report date range. Field trips offered = field trips taken + field trips refused + field trips pending.
- Total field trips taken for that employee for ALL schedules within the report date range.
- Total field trips refused by that employee for ALL schedules within the report date range.
- Total field trips that have been assigned to that employee for ALL schedules within the report date range that have not yet been driven by the driver.
- Total field trips offered to that employee for ALL schedules within the report date range. Field trips offered = field trips taken + field trips refused + field trips pending.

The Summary Section of the Driver Report Lists the Following:

- Each schedule code
- Each schedule description
- The average number of field trips taken for each driver for that schedule for the report date range.
- The average number of field trips refused for each driver for that schedule for the report date range.
- The total number of field trips taken for ALL drivers for that schedule for the report date range.
- The total number of field trips refused for ALL drivers for that schedule for the report date range.
- The total number of field trips taken for ALL drivers for ALL schedules for the report date range.
- The total number of field trips refused for ALL drivers for ALL schedules for the report date range.



To print the Driver Report, select the Management Reports menu and then click the Driver Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Driver Report screen is displayed (Figure 8-32).



Figure 8-32. The Driver Report Screen

This screen allows you to enter a departure date range of field trips to include on this report. This screen also allows you to specify if you wish to include the detail report section, the summary report section or both. (You may be interested in just one of the sections.) 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 Management Reports* previously described in this chapter for details.) Figure 8-33 shows a sample report.

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.

Print Detail Pages: Check this checkbox to include the Detailed Section of the Driver Report.

Print Summary Page: Check this checkbox to include the Summary Section of the Driver 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.



| Employees | | | | Individual | | | |
|------------------------|-------------|------------|----------|-------------|---------------|---------------|---------------|
| Number | Last Name | First Name | Schedule | Trips Taken | Trips Refused | Trips Pending | Trips Offered |
| 22 | YMPISABSYCI | MARJORIE | HD | 1 | 2 | 0 | 3 |
| 22 | YMPISABSYCI | MARJORIE | SS | 1 | 0 | 0 | 1 |
| 22 | YMPISABSYCI | MARJORIE | WD | 11 | 5 | 0 | 16 |
| 22 | YMPISABSYCI | MARJORIE | WE | 5 | 1 | 0 | 6 |
| <i>Employee Total:</i> | | | | 18 | 8 | 0 | 26 |
| 33 | GYBIAU | MARGARET | HD | 3 | 2 | 0 | 5 |
| 33 | GYBIAU | MARGARET | MD | 1 | 0 | 0 | 1 |
| 33 | GYBIAU | MARGARET | SS | 12 | 0 | 0 | 12 |
| 33 | GYBIAU | MARGARET | WD | 22 | 0 | 0 | 22 |
| 33 | GYBIAU | MARGARET | WE | 7 | 0 | 0 | 7 |
| <i>Employee Total:</i> | | | | 45 | 2 | 0 | 47 |
| 31 | BUNKI | KATHLEEN | WE | 1 | 0 | 0 | 1 |
| <i>Employee Total:</i> | | | | 1 | 0 | 0 | 1 |
| 36 | KUBI | MARY ANN | WE | 1 | 0 | 0 | 1 |
| <i>Employee Total:</i> | | | | 1 | 0 | 0 | 1 |
| 39 | NAPPI | BETTY | MD | 1 | 0 | 0 | 1 |
| <i>Employee Total:</i> | | | | 1 | 0 | 0 | 1 |
| 41 | BALLYNGIS | JOYCE | MD | 1 | 0 | 0 | 1 |
| 41 | BALLYNGIS | JOYCE | WD | 4 | 5 | 0 | 9 |
| 41 | BALLYNGIS | JOYCE | WE | 0 | 2 | 0 | 2 |
| <i>Employee Total:</i> | | | | 5 | 7 | 0 | 12 |
| 192 | WYLLASD | EVEARD | HD | 1 | 1 | 0 | 2 |
| 192 | WYLLASD | EVEARD | MD | 1 | 0 | 0 | 1 |
| 192 | WYLLASD | EVEARD | WD | 8 | 1 | 0 | 9 |
| 192 | WYLLASD | EVEARD | WE | 5 | 1 | 0 | 6 |
| <i>Employee Total:</i> | | | | 15 | 3 | 0 | 18 |
| 49 | CUNKLYN | ROBERTA | WE | 1 | 1 | 0 | 2 |
| <i>Employee Total:</i> | | | | 1 | 1 | 0 | 2 |
| 55 | GUI | SHARON | HD | 1 | 3 | 0 | 4 |

Figure 8-33. The Driver Report



Working with the Money Owed (Accounts Receivable) Report

The Money Owed Report (Figure 8-36) 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 Management Reports menu and then click the Money Owed Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Money Owed Report screen is displayed (Figure 8-34).

Figure 8-34. The Money Owed Report Screen

This screen allows you to select a specific customer to list all unpaid field trips on this report. This screen also allows you to enter a departure date range of field trips to include on this report. You can start each customer on a new page and include additional details about the trip (as described below). 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 Management Reports* previously described in this chapter for details.) Figure 8-36 shows a sample report.

THE SELECTION TAB

Selected Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number then click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer's number will appear in the Customer field. If you leave this field blank all customers will be selected for this report.

Selected Fund: This the Fund or charge code of a specific fund that you want to report on. If you don't know the fund's number then click on the Fund button and this will cause the Fund Search screen to display and allow you to select a fund from which to report on.

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 C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

New Page for Each Customer: Check this checkbox if you wish to start each new customer in the report on a new page. This is a very useful feature if you wish to print and distribute a Money Owed Report to every one of your customers. With this checkbox checked you only need this report once and all of your reports are printed.

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

Money Owed Report

Selection Other

Use standard T.O.M. Report Format:

ACCESS Format: RPT_AR_RPT

Email Report:

Report to File:

Print Preview Cancel

Figure 8. 35 – 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.



| Trip # | Trip Date | Bill Date | Fund | Destination | Purpose | Balance |
|--|------------|------------|------|--------------------------------|------------------------|-----------------|
| 2/23/00 8:04:32 AM | | | | | | |
| PARADISE VALLEY SCHOOL DISTRICT # 69 | | | | | | |
| Page: 1 | | | | | | |
| Money Owed Report | | | | | | |
| Selected Customer Name: | | | | | | |
| Selected Bill Date Range: 1/1/1999 — 12/31/1999 | | | | | | |
| 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 8-36. The Money Owed 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 8-39) or by Customer and Fund within Customer (Figure 8-40).

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 Management Reports menu and then click the Recap Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Recap Report screen is displayed (Figure 8-37).

This screen uses the 'Tabbed' format. The screen uses the Selection and Sorting tab (Figure 8-37) and an Other tab (Figure 8-38). 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 Management Reports* previously described in this chapter for details.) Figure 8-39 and Figure 8-40 show sample reports.



Entering Search and Sort Criteria on the Selection and Sorting Tab

Click on the Selection and Sorting tab (Figure 8-37), if it's not already selected. This tab allows you to enter selection criteria and sort the resulting report in two different sort orders.

The screenshot shows a software window titled "Recap Report". Inside, there's a sub-tabbed area with "Selection and Sorting" selected. The "Date Range" is set to "3/1/1998" and "3/31/2003". There are fields for "Customer" and "Fund", each with a dropdown arrow. To the right, under "Sorted By", there are two buttons: "Fund / Customer" and "Customer / Fund". At the bottom of the window are three buttons: "OK", "Preview", and "Cancel".

Figure 8-37. The Selection and Sorting Tab in the Recap Report Screen

THE SELECTION AND SORTING TAB

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.

Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number then click the down arrow next to the Customer field and a list of all your



customers will appear in alphabetical order. Click on the customer name to select it; the customer's number will appear in the Customer field. If you leave this field blank all customers will be selected for this report. Click the Customer button if you need to look up the customer using an alphabetical lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

Fund: You may select a specific fund to report on. This field is a drop down list box. If you don't know the number of the fund that you want to report on 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.

Don't worry if you don't know the fund number. T.O.M. gives you an easy way to lookup your fund by the fund name. To do this you click the Fund button. This causes the Fund Search Screen to appear. This screen will allow you to quickly search your existing funds by an alphabetical lookup. See *Chapter 3 – Entering Lookup Lists* in the *T.O.M. Getting Started Guide* 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 8-39). Click the Customer / Fund button to sort and subtotal the report by customer then fund (Figure 8-40).

THE OTHER TAB

Click on the Other tab (Figure 8-38), 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.

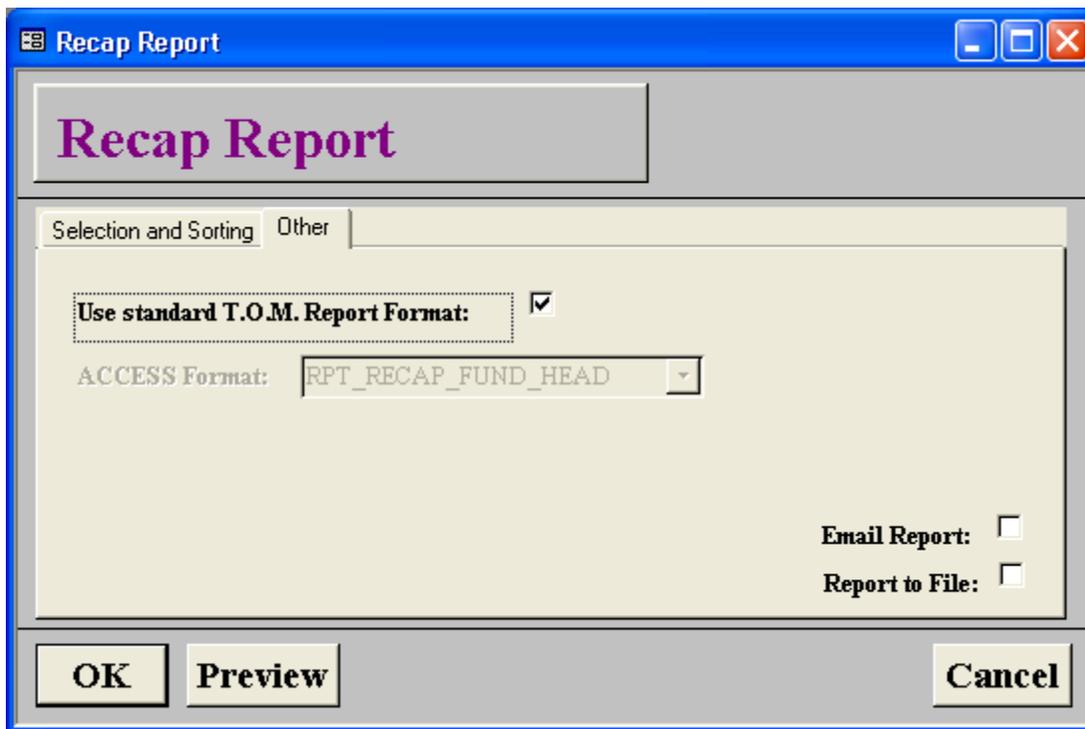


Figure 8-38. The Other Tab in the Recap Report Screen

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 recap reports (by Fund / Customer or Customer / Fund) are reports that you can customize. Check this checkbox to automatically use the regular Recap Report format for printing. If you uncheck this checkbox you can use a custom report 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.

ACCESS Format: If you uncheck the Use Standard T.O.M. Reports Formats checkbox as described above, you can click the drop-down arrow and select from any of the available formats. See *Appendix D – 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.

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| 2/23/00 8:10:49 AM | | PARADISE VALLEY SCHOOL DISTRICT # 69 | | | Page:51 | |
|--------------------------------|-----------------------------|--------------------------------------|----------------------|-----------------|--------------------|--------------------------|
| Recap Report | | | | | | |
| Sorted by: Fund / Customer | | | | | | |
| Date Range: 1/1/1999 2/31/1999 | | | | | | |
| Trip # | Customer | Destination | # of Miles | # of Hours | Total Cost | spl |
| 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 8-39. Recap Report by Fund then Customer



| Trip # | Fund | Destination | # of Miles | # of Hours | Total Cost | splt |
|--|----------------------------------|-----------------------------------|-----------------|--------------|-------------------|--------------------------|
| 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 8-40. Recap Report by Customer Then Fund



Working with the Employee Payroll Hours Report

While payroll is not a function that T.O.M. performs, T.O.M. does keep much information that is useful when preparing a transportation department's payroll. A key piece of information that T.O.M. holds is a driver's field trip hours. To help you prepare for your payroll T.O.M. has the Employee Payroll Hours Report (Figure 8-42). This report basically lists a driver's standard hours and field trip hours.

Reporting a driver's field trip hours for a certain payroll period can be complicated. This is largely due to the fact drivers sometimes don't turn in their trip tickets that contain their field trip hours on time. The result is that you must include these late hours with the next payroll hours. Unfortunately, with most field trip software packages this factor would invalidate any report that the software could produce that could be used to list the number of field trip hours for a specific payroll period. That is because most field trip software reports are based on a field trip departure date range rather than the date that the hours were actually reported by the driver.

For example, the driver Bill Pipist performed a field trip on 1/12/98. Normally, this field trip would be reported for the payroll period of 1/11/98 - 1/17/98. However, Bill didn't turn in his trip ticket until 1/19/98 so it must be processed with the payroll period of 1/19/98 - 1/31/98. If you then were to run a report of the driver's field trip hours for the payroll period of 1/19/98 - 1/31/98 most reports would miss Bill's late field trip.

T.O.M. would not miss Bill's time. That's because T.O.M. records the date that the driver's actual hours were actually entered into T.O.M. in a field called the Post Date. You can see and change the Post Date in the Trip Driver Information Screen. T.O.M. then compliments this Post Date with the Employee Payroll Hours Report that allows you to print the driver's field trip hours within a range of Post Dates. With this feature you can use T.O.M. to accurately report on the number of field trip hours a driver had during a payroll period.

Many times a school district will have a policy of a minimum number of hours that a driver will be paid and a customer will be billed for a field trip. T.O.M. allows you to set up this minimum number of hours policy in its billing instructions. In the Employee Payroll Hours Report T.O.M. will report and total a driver's hours with and without these minimum numbers of hours. Your district's policy towards minimums will dictate which figure on this report you will use.

TO further assist in payroll reporting T.O.M. allows you to differentiate how many hours the employee is being paid versus how many hours the customer is billed for the employee's labor on the field trip. The Employee Payroll Hours Report will use the employee's Hours Paid field in the Field Trip Employee Information Screen.

Finally, in a further attempt to design this report to be a useful payroll reporting tool T.O.M. will also list an employee's standard weekly hours. If you will recall you enter these standard weekly hours in the Employee Screen. T.O.M. will even total these weekly hours with the total field trip hours.

NOTE: This total will only be valid if your reporting period is for a week. If the period is any longer than this than most likely the report will underreport the number of standard weekly hours that were incurred for the period because it will only add ONE week's worth of standard weekly hours.

To print the Employee Payroll Hours Report, select the Management Reports menu and then click the Employee Payroll Hours Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Employee Payroll Hours Report screen is displayed (Figure 8-41).



Employee Payroll Hours Report

Please select the employee types that you wish to include in this report and then click the PRINT button.

Post Date Range: From: To: Dates:

Selected Employee:

Title:

Employee Types:

| | |
|--------|------------------|
| A | DRIVING AIDE |
| A(ND) | NON-DRIVING AIDE |
| A(R) | AIDE RETIRED |
| A(S) | SUB AIDE |
| C | CAR DRIVER |
| D | DRIVER |
| D(P.T) | DRIVER PART TIME |
| D(R) | DRIVER RETIRED |
| D(S) | DRIVER SUB |
| DIR | DIRECTOR |
| DT | DRIVER TRAINFR |

Selected Employee Types:

| | |
|---|--------|
| D | DRIVER |
|---|--------|

Select All
Deselect All
Add>>
<<Remove

Email Report:
Report to File:

Print **Preview** **Refresh List** **Cancel**

Figure 8-41. The Employee Payroll Hours Report Screen

This screen allows you to select the employees you wish to include in the report. Employees can be added and removed from the selected list on at a time or all at once. You can also select a date range for the report for the date the field trip was *posted*. 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 Management Reports* previously described in this chapter for details.) Figure 8-42 shows a sample report.

Post Date Range: Use these fields to search your field trips by the date they were entered or *posted* into T.O.M. When you enter a driver's actual hours T.O.M. automatically sets the Post Date in the Trip Driver Information screen.

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 Employee: You may select a specific employee to print a report for if you like. Enter the number of the employee or leave this field blank for all employees. Click on the down arrow to the right of the employee field to see a list of employees that you may select. Once you find the employee you desire click on it and it will automatically appear in the employee field.

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 Employee Types: These are the employee types that you want to report on. T.O.M. allows you to enter all of your transportation employees into the Employee Database. Since many employee types do NOT have route times T.O.M. allows you to specify which employee types to select for this report.

T.O.M. makes this an easy process by displaying one list of ALL the employee types that you have created and then another list of those employee types that you want to report on. Use the Select All, Deselect All, Add>> and <<Remove buttons to move employee types to and from the selected list. For example, to add an employee type to the list of selected employees, click on the employee type in the Employee Types list and then click the Add>> button. The employee type you selected will be added to the Selected Employee Types list.

NOTE: The Select All button is useful if you wish to report on all but a few employee types. Click the Select All button and then click the Add>> button to add all the employee types to the Selected Employee Types list. Then individually select each employee type you *don't* want in the Selected Employee Types list and click the <<Remove button.

NOTE: If for some reason the employee types in the list of all your employee types do NOT match your employee types then click the Refresh List button to rebuild the list of all employee types in the list to include only the employee types that you have created.

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.

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2/23/00 9:13:49 AM PARADISE VALLEY SCHOOL DISTRICT # 69

EMPLOYEE PAYROLL HOURS REPORT

| EMPLOYEE | | STANDARD HOURS | | | | | | | TOTAL | |
|------------------------|-----------------------------|-----------------------------|---------------------------------------|------|---------------------|------|------------|------|-------|-------|
| EMPLOYEE | SOCIAL SECURITY | EMPLOYEE TYPE | MON | TUE | WED | THU | FRI | SAT | SUN | |
| BICK, DAVID | 869-66-9069 | D - DRIVER | 6.75 | 6.75 | 5.75 | 6.75 | 6.75 | 0.00 | 0.00 | 32.75 |
| Trip# | Customer | Destination | Trip Hours | | Trip Hours with Min | | Post Date | | | |
| 9107 | HORIZON HIGH SCHOOL | RED MOUNTAIN HIGH SCHOOL | 6.25 | | 6.25 | | 12/6/1999 | | | |
| Daily OT Hours: | 0 | Weekly OT Hours: 0 | Wait Hours: 0 | | OT Wait Hours: 0 | | | | | |
| Total Daily OT Hours: | 0 | Total Wait Hours: 0 | Total Field Trip Hours: Actual: 6.25 | | With Min: 6.25 | | | | | |
| Total Weekly OT Hours: | 0 | Total Wait OT Hours: 0 | Total All Hours: Actual: 39.00 | | With Min: 39.00 | | | | | |
| BILL, PAULINE | 888-89-0966 | D - DRIVER | 8.00 | 8.00 | 8.00 | 8.00 | 8.00 | 0.00 | 0.00 | 40.00 |
| Trip# | Customer | Destination | Trip Hours | | Trip Hours with Min | | Post Date | | | |
| 9103 | HORIZON HIGH SCHOOL | PARADISE VALLEY HIGH SCHOOL | 5.75 | | 5.75 | | 12/6/1999 | | | |
| Daily OT Hours: | 0 | Weekly OT Hours: 0 | Wait Hours: 0 | | OT Wait Hours: 0 | | | | | |
| Total Daily OT Hours: | 0 | Total Wait Hours: 0 | Total Field Trip Hours: Actual: 6.25 | | With Min: 6.25 | | | | | |
| Total Weekly OT Hours: | 0 | Total Wait OT Hours: 0 | Total All Hours: Actual: 39.00 | | With Min: 39.00 | | | | | |
| 9819 | PARADISE VALLEY HIGH SCHOOL | GLENDALE COMMUNITY COLLEGE | 10.25 | | 10.25 | | 12/7/1999 | | | |
| Daily OT Hours: | 0 | Weekly OT Hours: 0 | Wait Hours: 0 | | OT Wait Hours: 0 | | | | | |
| Total Daily OT Hours: | 0 | Total Wait Hours: 0 | Total Field Trip Hours: Actual: 20.50 | | With Min: 20.50 | | | | | |
| Total Weekly OT Hours: | 0 | Total Wait OT Hours: 0 | Total All Hours: Actual: 60.50 | | With Min: 60.50 | | | | | |
| 9826 | COPPER CANYON-COYOTE CLUB | SKATELAND | 4.50 | | 4.50 | | 12/10/1999 | | | |
| Daily OT Hours: | 0 | Weekly OT Hours: 0 | Wait Hours: 0 | | OT Wait Hours: 0 | | | | | |
| Total Daily OT Hours: | 0 | Total Wait Hours: 0 | Total Field Trip Hours: Actual: 20.50 | | With Min: 20.50 | | | | | |
| Total Weekly OT Hours: | 0 | Total Wait OT Hours: 0 | Total All Hours: Actual: 60.50 | | With Min: 60.50 | | | | | |

SIGNATURE _____ EFFECTIVE DATE _____

Figure 8-42. The Employee Payroll Hours Report



Working with the Driver Refusal Report

The Driver Refusal Report (Figure 8-44) was designed to give the Transportation Department a tool to analyze the number of times that a driver refused a field trip that he / she has been offered (assigned). With the Driver Refusal Report the Transportation Department can quickly determine if there are any drivers for a schedule that are particularly unreliable.

The Driver Refusal Report includes the following information:

- The selected employee.
- The selected schedule.
- The specified date range.
- The last name of the driver that refused a field trip.
- The first name of the driver that refused a field trip.
- The schedule of the field trip that was refused.
- The name of the customer of the field trip that was refused.
- The number of the field trip that was refused.
- The departure date of the field trip that was refused.
- The subtotal count of field trips refused by a driver for a schedule.
- The total count of field trips refused by a driver.

To print the Driver Refusal Report, select the Management Reports menu and then click the Driver Refusal Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Driver Refusal Report screen is displayed (Figure 8-43).

The screenshot shows a software window titled "DRIVER REFUSAL REPORT". The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The main content area has a grey background with a large purple heading "Driver Refusal Report". Below the heading are several input fields and checkboxes:

- Date Range:** Two date pickers showing "6/30/2003" separated by a minus sign, followed by a "Dates:" label and a dropdown menu.
- Employee:** A dropdown menu.
- Print All Employees:** A checked checkbox.
- Schedule:** A dropdown menu.
- Print All Schedules:** A checked checkbox.
- Email Report:** An unchecked checkbox.
- Report to File:** An unchecked checkbox.

At the bottom of the window are three buttons: "Print", "Preview", and "Cancel".

Figure 8-43. The Driver Refusal Report Screen

This screen allows you to enter a departure date range, select a specific employee or all employees and select a specific schedule or all schedules. 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 Management Reports previously described in this chapter for details.) Figure 8-44 shows a sample report.

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.

Employee: You may select a specific employee on which to report. Click on the down arrow to the right of the employee field to see a list of employees that you may select. Once you find the employee you desire click on it and it will automatically appear in the employee field.

Print All Employees: Check this checkbox to print the report for all drivers, even if one is listed in the Employee field.

Schedule: You may search your field trips by the schedules to which a driver is assigned. Click on the down arrow to the right of the schedule field to see a list of schedules that you may select. Once you find the schedule you desire click on it and it will automatically appear in the schedule field.

Print All Schedules: Check this checkbox to print all the schedules to which a driver is assigned.

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.



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Driver Refusal Report

Selected Employee: ALL

Selected Schedule: ALL

Selected Date Range: 1/1/1999 - 2/31/1999

| Last Name | First Name | Schedule | Customer Name | Field Trip # | Departure Date |
|------------------------|------------|----------|-----------------------------|--------------|----------------|
| ASCHIS | NEWTON | MD | DESERT SHADOWS MIDDLE | 9901 | 12/14/1999 |
| ASCHIS | NEWTON | MD | SONORAN SKY ELEM | 9338 | 12/17/1999 |
| Total Schedule: | 2 | | | | |
| Total Driver: | 2 | | | | |
| BALLYNGIS | JOYCE | WD | PARADISE VALLEY HIGH SCHOOL | 8250 | 3/3/1999 |
| BALLYNGIS | JOYCE | WD | NORTH CANYON HIGH SCHOOL | 8070 | 3/17/1999 |
| BALLYNGIS | JOYCE | WD | PARADISE VALLEY HIGH SCHOOL | 8339 | 4/15/1999 |
| BALLYNGIS | JOYCE | WD | NORTH CANYON HIGH SCHOOL | 9026 | 9/7/1999 |
| BALLYNGIS | JOYCE | WD | SHADOW MOUNTAIN HIGH SCHOOL | 9373 | 9/10/1999 |
| Total Schedule: | 5 | | | | |
| BALLYNGIS | JOYCE | WE | AMERICAN CANCER SOCIETY | 8231 | 2/27/1999 |
| BALLYNGIS | JOYCE | WE | HORIZON HIGH SCHOOL | 8328 | 4/24/1999 |
| Total Schedule: | 2 | | | | |
| Total Driver: | 7 | | | | |
| BANK JS. | HENRY | MD | BOULDER CREEK/BOBCATS | 8109 | 2/12/1999 |
| BANK JS. | HENRY | MD | DESERT TRAILS ELEM | 7340 | 4/7/1999 |
| BANK JS. | HENRY | MD | GRAYHAWK ELEM | 8046 | 4/8/1999 |
| BANK JS. | HENRY | MD | SUNRISE MIDDLE | 8451 | 4/21/1999 |
| BANK JS. | HENRY | MD | EXPLORER MIDDLE | 8272 | 4/26/1999 |
| BANK JS. | HENRY | MD | WHISPERING WIND ELEM. | 8591 | 5/7/1999 |
| Total Schedule: | 6 | | | | |
| BANK JS. | HENRY | WD | HORIZON HIGH SCHOOL | 8312 | 4/23/1999 |
| BANK JS. | HENRY | WD | HORIZON HIGH SCHOOL | 9102 | 10/8/1999 |
| BANK JS. | HENRY | WD | HORIZON HIGH SCHOOL | 9810 | 10/27/1999 |
| BANK JS. | HENRY | WD | NORTH CANYON HIGH SCHOOL | 9660 | 11/5/1999 |
| Total Schedule: | 4 | | | | |
| BANK JS. | HENRY | WE | PARADISE VALLEY HIGH SCHOOL | 9811 | 11/6/1999 |
| Total Schedule: | 1 | | | | |
| Total Driver: | 11 | | | | |
| BAYLUS | ANN | WD | SHADOW MOUNTAIN HIGH SCHOOL | 9990 | 11/24/1999 |
| Total Schedule: | 1 | | | | |
| Total Driver: | 1 | | | | |
| BHUMCUN | SANDRA | HD | COPPER CANYON-COYOTE CLUB | 8511 | 3/31/1999 |
| Total Schedule: | 1 | | | | |
| BHUMCUN | SANDRA | MD | ARROWHEAD ELEM | 6944 | 2/2/1999 |

Figure 8-44. The Driver Refusal Report



Working with the Canceled Trip Report

The Canceled Trip Report (Figure 8-46) was designed to give the Transportation Department a complete log of all field trips that have either been partially or completely canceled by the customer. The Transportation Department can use the Canceled Trip Report to quickly determine those drivers that have had a field trip canceled and are waiting for a new field trip to replace the canceled field trip. Or the Transportation Department can use this report to identify customers that have a high rate of field trip cancellations.

When running the Canceled Trip Report the user can specify a date range of cancellations to print. The user can also select a specific employee (or all employees) that has had cancellations. *Finally, the user can specify if he / she wishes to see all cancellations or just those that have not been replaced by another field trip.*

The Canceled Trip Report contains the following information:

- The Selected Employee.
- Whether the user selected all cancellations or just those not yet replaced by another field trip.
- The selected date range.
- The last name of the employee that was canceled from a field trip.
- The first name of the employee that was canceled from a field trip.
- The schedule of the canceled field trip.
- The number of the canceled field trip.
- The departure date of the canceled field trip.
- The destination description of the canceled field trip.
- The number of the field trip that replaced the canceled field trip.
- The departure date of the field trip that replaced the canceled field trip.
- The destination description of the field trip that replaced the canceled field trip.

To print the Canceled Trip Report, select the Management Reports menu and then click the Canceled Trip Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Canceled Trip Report screen is displayed (Figure 8-45).

The screenshot shows a software window titled "CANCELED TRIP REPORT". Inside the window, the title "Canceled Trip Report" is displayed in a large, purple, serif font. Below the title, there are several input fields and checkboxes. The "Date Range" field shows "6/30/2003" followed by a minus sign and another "6/30/2003", with small calendar icons next to each date. To the right of the date range is a "Dates:" label and a dropdown menu. Below the date range is an "Employee:" label and a dropdown menu. There are three checkboxes: "Print All Employees:" which is checked, "Print JUST Unreplaced Cancellations:" which is unchecked, and "Email Report:" which is unchecked. Below the "Email Report:" checkbox is another unchecked checkbox labeled "Report to File:". At the bottom of the window, there are three buttons: "Print", "Preview", and "Cancel".

Figure 8-45. The Canceled Trip Report Screen



This screen allows you to enter a departure date range, select a specific employee or all employees and select canceled field trips of a specific employee or all employees that have *not* been replaced by other field trips. 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 Management Reports* previously described in this chapter for details.) Figure 8-46 shows a sample report.

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.

Employee: You may select a specific employee on which to report. Click on the down arrow to the right of the employee field to see a list of employees that you may select. Once you find the employee you desire click on it and it will automatically appear in the employee field.

Print All Employees: Check this checkbox to print the report for all drivers, even if one is listed in the Employee field.

Print JUST Unreplaced Cancellations: Check this checkbox to select all canceled field trips that have NOT been replaced by other field trips.

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.



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Canceled Trip Report

Selected Employee: ALL
 Unreplaced Only: No
 Selected Date Range: 1/1/1999 - 2/31/1999

| Employee | | Cancelled Trip | | Replacement Trip | | |
|-----------|------------|---------------------|------------------------------|---------------------|------------------------------|----------------|
| Last Name | First Name | Schedule | Field Trip # | Departure Date | Field Trip # | Departure Date |
| ASCHIS | NEWTON | MD | 9043 | 11/10/1999 | 9375 | 11/8/1999 |
| | | Destination: | PHOENIX ART MUSEUM | Destination: | PHOENIX CIVIC CENTER | |
| ASCHIS | NEWTON | MD | 9375 | 11/15/1999 | 9449 | 11/16/1999 |
| | | Destination: | PHOENIX CIVIC CENTER | Destination: | PHOENIX SYMPHONY HALL | |
| ASCHIS | NEWTON | MD | 9853 | 11/16/1999 | 9912 | 11/12/1999 |
| | | Destination: | FLEISCHER MUSEUM | Destination: | NORTH CANYON HIGH SCHOOL | |
| BALLYNGIS | JOYCE | WD | 8493 | 4/6/1999 | 8306 | 4/5/1999 |
| | | Destination: | DESERT MOUNTAIN HIGH SCHOOL | Destination: | DEER VALLEY HIGH SCHOOL | |
| BALLYNGIS | JOYCE | WD | 9016 | 9/1/1999 | 9026 | 9/2/1999 |
| | | Destination: | HIGHLAND HIGH SCHOOL | Destination: | MESQUITE HIGH SCHOOL | |
| BANK JS. | HENRY | md | 7850 | 2/18/1999 | 8156 | 2/17/1999 |
| | | Destination: | EARTH GRAINS BAKERY | Destination: | DESERT BONTANICAL GARDENS | |
| BANK JS. | HENRY | MD | 8156 | 2/22/1999 | 6839 | 2/22/1999 |
| | | Destination: | DESERT BONTANICAL GARDENS | Destination: | TEMPE PERFORMING ARTS CENTER | |
| BANK JS. | HENRY | md | 7880 | 2/24/1999 | 7088 | 3/2/1999 |
| | | Destination: | PHOENIX ZOO | Destination: | PHOENIX ART MUSEUM | |
| BANK JS. | HENRY | md | 7546 | 3/9/1999 | 8458 | 3/9/1999 |
| | | Destination: | SMITHS GROCERY | Destination: | Stapley Junior High School | |
| BANK JS. | HENRY | MD | 8517 | 5/3/1999 | 8591 | 5/3/1999 |
| | | Destination: | SUPERIOR COURT | Destination: | SUNRISE MIDDLE SCHOOL | |
| BANK JS. | HENRY | WD | 9123 | 10/27/1999 | 9798 | 10/25/1999 |
| | | Destination: | THUNDERBIRD PARK DEER VALLEY | Destination: | HORIZON HIGH SCHOOL | |
| BAYLUS | ANN | WD | 9115 | 11/26/1999 | 9990 | 11/22/1999 |
| | | Destination: | A.I.A. TBA | Destination: | MESA HIGH SCHOOL | |
| BHUMCUN | SANDRA | md | 7821 | 1/12/1999 | 7859 | 1/12/1999 |
| | | Destination: | MESA SOUTHWEST MUSEUM | Destination: | LIFE CARE CENTER | |

Figure 8-46. The Canceled Trip Report



Working with the Makeup Trip Report

The Makeup Trip Report (Figure 8-48) was designed to give the Transportation Department a complete log of all incidents where drivers had assignments to a field trip skipped during automatic assignment due to overtime preclusion or conflicting field trips. This report also lists incidents where drivers who were assigned to a field trip but then had their assignment status manually changed to Passed-Makeup. The Transportation Department can use the Makeup Trip Report to quickly determine those drivers that are waiting for a new field trip to replace the makeup field trip.

When running the Makeup Trip Report you can specify a date range of skips / passed-makeups. You can select a specific employee (or all employees) that has makeup field trips. You can also choose to see all makeups or just those that have not been replaced by another field trip.

The Makeup Trip Report contains the following information:

- The Selected Employee.
- Whether the user selected all makeups or just those not yet replaced by another field trip.
- The selected date range.
- The last name of the employee that has a makeup field trip.
- The first name of the employee that has a makeup field trip.
- The schedule of the field trip that was skipped / passed-makeup.
- The number of the field trip that was skipped / passed-makeup.
- The departure date of the field trip that was skipped / passed-makeup.
- The destination description of the field trip that was skipped / passed-makeup.
- The number of the field trip that replaced the makeup field trip.
- The departure date of the field trip that replaced the makeup field trip.
- The destination description of the field trip that replaced the makeup field trip.

To print the Makeup Trip Report, select the Management Reports menu and then click the Makeup Trip Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Makeup Trip Report screen is displayed (Figure 8-47).

This screen allows you to enter a departure date range, select a specific employee or all employees and select makeup field trips of a specific employee or all employees that have *not* been replaced by other field trips. 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 Management Reports* previously described in this chapter for details.) Figure 8-48 shows a sample report.



Figure 8-47. The Makeup Trip 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 C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

Employee: You may select a specific employee on which to report. Click on the down arrow to the right of the employee field to see a list of employees that you may select. Once you find the employee you desire click on it and it will automatically appear in the employee field.

Print All Employees: Check this checkbox to print the report for all drivers, even if one is listed in the Employee field.

Print JUST Unreplaced Makeups: Check this checkbox to select all makeup field trips that have NOT been replaced by other field trips.

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.

| Employee | | Trip To Be Replaced | | | Replacement Trip | |
|-----------|------------|---------------------|--------------------------------|---------------------|--------------------------------|----------------|
| Last Name | First Name | Schedule | Field Trip # | Departure Date | Field Trip # | Departure Date |
| ASCHIS | NEWTON | MD | 9656 | 10/22/1999 | 9641 | 10/26/1999 |
| | | Destination: | CASTLES AND COASTERS | Destination: | PHOENIX MUNICIPAL STADIUM | |
| ASCHIS | NEWTON | MD | 9626 | 10/22/1999 | 9043 | 11/1/1999 |
| | | Destination: | CASTLES AND COASTERS | Destination: | PHOENIX ART MUSEUM | |
| ASCHIS | NEWTON | MD | 9871 | 11/16/1999 | 9317 | 11/16/1999 |
| | | Destination: | FRYS FOOD STORES | Destination: | OUT OF AFRICA WILDLIFE PARK | |
| ASCHIS | NEWTON | MD | 9870 | 11/16/1999 | 9805 | 11/8/1999 |
| | | Destination: | FRYS FOOD STORES | Destination: | MEMORIAL COLISEUM | |
| ASCHIS | NEWTON | MD | 9803 | 11/17/1999 | 9901 | 11/22/1999 |
| | | Destination: | PHOENIX ZOO | Destination: | MARICOPA COUNTY HOSPITAL | |
| ASCHIS | NEWTON | MD | 9803 | 11/17/1999 | 9943 | 11/19/1999 |
| | | Destination: | PHOENIX ZOO | Destination: | TEMPE DIABLO STADIUM | |
| ASCHIS | NEWTON | MD | 9687 | 12/3/1999 | 9394 | 11/30/1999 |
| | | Destination: | PHOENIX SYMPHONY HALL | Destination: | SCOTTSDALE CENTER FOR THE ARTS | |
| ASCHIS | NEWTON | MD | 9762 | 12/3/1999 | 9329 | 11/24/1999 |
| | | Destination: | PARADISE VALLEY MALL | Destination: | Bowling/-SHEA | |
| ASCHIS | NEWTON | MD | 7228 | 12/3/1999 | 9338 | 12/7/1999 |
| | | Destination: | ARIZONA STATE CAPITAL | Destination: | MCCORMICK RAILROAD PARK | |
| ASCHIS | NEWTON | MD | 9899 | 12/8/1999 | 9367 | 11/30/1999 |
| | | Destination: | CELEBRITY THEATER | Destination: | PHX LITTLE THEATER COOKIE CO. | |
| ASCHIS | NEWTON | MD | 9743 | 12/8/1999 | 9893 | 1/10/2000 |
| | | Destination: | ARIZONA STATE CAPITAL | Destination: | ARIZONA SCIENCE CENTER | |
| ASCHIS | NEWTON | MD | 9699 | 12/8/1999 | 9730 | 12/7/1999 |
| | | Destination: | SCOTTSDALE CENTER FOR THE ARTS | Destination: | ARIZONA STATE CAPITAL | |
| ASCHIS | NEWTON | MD | 9324 | 12/10/1999 | 9158 | 1/3/2000 |
| | | Destination: | Bowling/-SHEA | Destination: | PIONEER VILLAGE | |



Figure 8-48. The Makeup Trip Report



Working with the Field Trip Budget Report

The Detailed / Summary Field Trip Budget Reports (Figure 8-50 and Figure 8-51) were designed to give your school district an exact accounting of each school's field trip budget. The Detailed Field Trip Budget Report (Figure 8-50) gives you all of the information you need to know concerning a school's field trip budget. This report will list a school's 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 the school's 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 the school's field trip budget. These field trips are listed separately and will not be subtracted from a school's field trip budget.

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

The Summary Field Trip Budget Report (Figure 8-51) gives exact field trip budget information in one line for each of your customers (schools) in a straightforward simple to read report. The Summary Field Trip Budget Report gives you the school's beginning field trip budget, the total of all billed field trips, the estimated total for all outstanding field trips and a remaining field trip budget.

The Detailed Field Trip Budget Report contains the following information:

- The selected customer.
- The selected departure date range.
- The name and number of each customer.
- 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 (Detailed or Summary), select the Management Reports menu and then click the Field Trip Budget Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Field Trip Budget Report screen is displayed (Figure 8-49).



Figure 8-49. The Field Trip Budget Report Screen

This screen allows you to enter a customer and/or departure date range of field trips to include on this report. This screen allows you to specify if you wish to include the detail report section, the summary report section or both. (You may be interested in just one of the sections.) You can also include in the report field trips that didn't affect the budget. 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 Management Reports* previously described in this chapter for details.) Figure 8-50 shows a sample of a Detailed Field Trip Budget Report. Figure 8-51 shows a sample of a Summary Field Trip Report.

Selected Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number then click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer's number will appear in the Customer field. If you leave this field blank all customers will be selected for this report.

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 Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number then click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer's number will appear in the Customer field. If you leave this field blank all customers will be selected for this report.

Summary Report Only: Check this checkbox to print *only* the Summary Field Trip Budget Report (Figure 8-51); otherwise both reports are printed.

Show Field Trips That Didn't Affect The Budget: Check this checkbox to print all field trips for a customer, regardless of whether or not the field trip affected the budget. If it is not checked just those field trips with funds designated, as those as to be subtracted from the budget are included in the report.

NOTE: As you know you can designate that a field trip should not be subtracted from a customer's budget. To do this you would assign a fund that you defined as one not to be subtracted from the customer's 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. For more information about defining a fund as one that will be subtracted from a customer's budget see *Funds* in *Chapter 3 - Entering Lookup Lists* of the *T.O.M. Getting Started Manual*.

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.



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Detailed Field Trip Budget Report

Selected Customer Name: ARROWHEAD ELEM

Selected Date Range: 1/1/2000 - 12/31/2000

| 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 8-50. The Detailed Field Trip Budget Report



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Summary Budget Report

Selected Customer Name: _____ **Selected Date Range:** 1/1/1999 - 2/31/1999

| Customer # | Name | Beginning Field Trip Budget | Total BILLED Field Trips | Total UNBILLED Field Trips | Remaining Field Trip Budget |
|------------|---------------------------|-----------------------------|--------------------------|----------------------------|-----------------------------|
| 54 | DESERT SPRINGS ELEM. | 5,000.00 | 3,230.95 | 863.50 | 905.55 |
| 55 | EAGLE RIDGE ELEM. | 5,000.00 | 4,314.95 | 146.00 | 539.05 |
| 56 | ECHO MOUNTAIN ELEM. | 5,000.00 | 4,326.85 | 748.65 | -75.50 |
| 57 | FOOTHILLS ELEM. | 5,000.00 | 2,166.25 | 271.35 | 2,562.40 |
| 58 | GOLD DUST ELEM. | 5,000.00 | 2,827.55 | 182.90 | 1,989.55 |
| 59 | GREENWAY MIDDLE | 5,000.00 | 5,301.05 | 337.75 | -638.80 |
| 60 | HAR ZION UNITED SYNAGOGUE | 5,000.00 | 0.00 | 0.00 | 5,000.00 |
| 61 | S.W. HEADSTART/PALOMINO | 5,000.00 | 446.85 | 0.00 | 4,553.15 |
| 62 | HIDDEN HILLS ELEM. | 5,000.00 | 1,620.90 | 202.70 | 3,176.40 |
| 63 | HORIZON HIGH SCHOOL | 5,000.00 | 20,974.95 | 1,761.40 | -17,736.35 |
| 64 | INDIAN BEND ELEM. | 5,000.00 | 3,988.90 | 1,286.25 | -275.15 |
| 65 | LA CASA DE CRISTO CHURCH | 5,000.00 | 7,948.50 | 0.00 | -2,948.50 |
| 66 | LARKSPUR ELEM. | 5,000.00 | 3,011.05 | 1,091.65 | 897.30 |
| 67 | LIBERTY ELEM. | 5,000.00 | 3,953.45 | 373.30 | 673.25 |
| 68 | LIFELINE COMMUNITY CHURCH | 5,000.00 | 0.00 | 0.00 | 5,000.00 |
| 69 | LINCOLN HEIGHTS CHRISTIAN | 5,000.00 | 0.00 | 0.00 | 5,000.00 |
| 70 | LIVING DYN. COUN. CENTER | 5,000.00 | 0.00 | 0.00 | 5,000.00 |
| 71 | MERCURY MINE ELEM. | 5,000.00 | 1,536.00 | 52.40 | 3,411.60 |
| 72 | MOST HOLY TRINITY CHURCH | 5,000.00 | 0.00 | 0.00 | 5,000.00 |

Figure 8-51. The Summary Field Trip Budget Report



Working with the Driver Hours Reports

If your district assigns field trips by field trip hours equalization or *hours averaging*, then tracking and reporting these hours is vital. Whether or not you are assigning your drivers to field trips using an hours' averaging method having up to date statistics on you driver field trip hours is important. T.O.M. has the two following management reports to address this need:

- Driver Field Trip Hours Report
- Driver / Schedule Field Trip Hours Report

The Driver Field Trip Hours Report (Figure 8-53) lists each driver's total field trip hours for all field trips taken from the beginning of the school year to the latest field trip assignment. The Driver / Schedule Field Trip Hours Report (Figure 8-55) will list all drivers in a particular schedule and the total field trip hours each driver has for ALL field trips OR just field trips within THAT schedule from the beginning of the school year to the latest field trip assignment.

NOTE: How does T.O.M. know when the beginning of your school year is? You tell T.O.M. in the District Options screen. BUT you can only tell T.O.M. this date if you have set your automatic assignment method to Hours. If the automatic assignment method is set to Rotation then this date is disabled. So how can you run this report if you are assigning drivers using the Rotation method? Just go into your District Options screen and temporarily change your automatic assignment method to Hour, which will cause the field Recalculate Driver's Field Trip Hours As Of This Date to enable. This is the date that the reports use. It is usually the beginning of the district's school year, however, you can choose whatever date you please. After you have set the date then change the automatic assignment method back to Rotation and you may then run these reports.

To print the Drivers Hours Report, select the Management Reports menu and then click the Drivers Hours Report option (Figure 8-1). Then click on one of the following options:

- Driver Field Trip Hours Report option. The Driver Field Trip Hours Report screen is displayed (Figure 8-52).
- Driver / Schedule Field Trip Hours Report option. The Driver / Schedule Field Trip Hours Report is displayed (Figure 8-54).

(See *Accessing the Management Reports* at the beginning of this chapter if you need help selecting reports from the Management Reports menu.)

About the Driver Field Trip Hours Report

The Driver Field Trip Hours Report (Figure 8-53) will list each employee's total field trip hours and the five components that make up a driver's field trip hours. T.O.M. will sort the Employee Field Trip Hours Report in ascending order (smallest to largest) by the employee's total field trip hours.

Base Hours: These are the hours that you have entered in the Employee screen or the Employee Schedule screen. These hours are used to give a number of hours to a new driver that comes into the district in the middle of the year and therefore, has no field trip hours. To prevent T.O.M. from giving this new driver almost all field trip assignments until he / she *caught up* in field trip hours with the other drivers you can enter the average number of field trip hours the other drivers had at the time the driver started.

Assigned Hours - Actual: This is the total hours of the field trips that the driver was assigned to that has actual hours recorded for the driver.



Assigned Hours - Estimated: For those field trips that the driver is assigned to but has not logged actual hours in for T.O.M. will use the field trip's estimated hours. The total of all field trips that the driver is assigned to without actual hours is represented in this figure.

Refused Hours - Actual: When a driver is assigned to a field trip and then later refuses the field trip he / she is still charged for the field trip assignment as if they actually performed the field trip. If the other drivers that actually performed the field trip have their actual hours logged for a field trip that another driver refused the refusing driver is charged that *average of all the employees assigned to the trip's actual hours*. The total of these hours is represented in this figure.

Refused Hours - Estimated: For those field trips that the driver has refused that do not have any actual hours logged in by the drivers that actually performed the field trip T.O.M. will use the field trip's estimated hours. The total of all field trips that the driver has refused without actual hours is represented in this figure.

Using the Driver's Field Trip Hours Report Screen

The Driver's Field Trip Hours Report screen (Figure 8-52) allows you to select the employees you wish to include in the report. Employees can be added and removed from the selected list on at a time or all at once. 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 Management Reports* previously described in this chapter for details.) Figure 8-53 shows a sample report.

Driver Field Trip Hours Report

Please select the employee types that you wish to include in this report and then click the PRINT button.

Recalculate employee field trip hours before running report:

Selected Employee:

Employee Types:

| | |
|-------|------------------|
| A | DRIVING AIDE |
| A(ND) | NON-DRIVING AIDE |
| A(R) | AIDE RETIRED |
| A(S) | SUB AIDE |
| C | CAR DRIVER |
| D | DRIVER |
| D(PT) | DRIVER PART TIME |
| D(R) | DRIVER RETIRED |
| D(S) | DRIVER SUB |
| DIR | DIRECTOR |
| DT | DRIVER TRAINER |

Selected Employee Types:

| | |
|---|--------|
| D | DRIVER |
|---|--------|

Select All

Deselect All

Add>>

<<Remove

Email Report:

Report to File:

Print Preview Refresh List Cancel



Figure 8-52. The Driver's Field Trip Hours Report Screen

Recalculate Employee Field Trip Hours Before Running Report: Because there are so many factors and situations that affect a driver's total field trip hours T.O.M. does not keep track of this total as it's performing various field trip operations. Rather, T.O.M. will periodically recalculate every driver's field trip hours from the beginning. Depending on your district's size and the speed of your computer and network this can be somewhat time consuming. This checkbox allows you to control whether T.O.M. will perform this recalculation before printing the report.

In general, it is a good idea to let T.O.M. recalculate the driver's field trip hours before printing this report. That way you can be sure you have the most up to date information on your report. However, if you know for example, that T.O.M. had just performed this recalculation for a previous function and the recalculation process can be rather long, then you may choose to UNCHECK this field and have T.O.M. bypass this step.

Selected Employee: You may select a specific employee to print a report for if you like. Enter the number of the employee that you wish to report on here or leave this field blank for all employees. If you don't know the number of the employee that you desire then click on the down arrow to the right of the selected employee field. A drop down list of all of your employees will appear and allow you to select one of these employees for the report.

Selected Employee Types: These are the employee types that you want to report on. T.O.M. allows you to enter all of your transportation employees into the Employee Database. Since many employee types do NOT have route times T.O.M. allows you to specify which employee types to select for this report.

T.O.M. makes this an easy process by displaying one list of ALL the employee types that you have created and then another list of those employee types that you want to report on. Use the Select All, Deselect All, Add>> and <<Remove buttons to move employee types to and from the selected list. For example, to add an employee type to the list of selected employees, click on the employee type in the Employee Types list and then click the Add>> button. The employee type you selected will be added to the Selected Employee Types list.

NOTE: The Select All button is useful if you wish to report on all but a few employee types. Click the Select All button and then click the Add>> button to add all the employee types to the Selected Employee Types list. Then individually select each employee type you *don't* want in the Selected Employee Types list and click the <<Remove button.

NOTE: If for some reason the employee types in the list of all your employee types do NOT match your employee types then click the Refresh List button to rebuild the list of all employee types in the list to include only the employee types that you have created.

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.



PARADISE VALLEY SCHOOL DISTRICT # 69
Driver Field Trip Hours Report

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| Employee | Total Hours | Base Hours/ Non Trip Hours | Assigned Hours | | Refused Hours | | Hire Date/ Seniority |
|---------------------|-------------|----------------------------|-------------------|-------------------|----------------------------|----|----------------------|
| | | | Actual/ Estimated | Actual/ Estimated | Actual Average / Estimated | | |
| 171 HYLKYKIS THOMAS | 304.00 | 0.00 | 200.50 | 63.50 | 8/23/1994 | 9 | |
| 55 GUI SHARON | 315.84 | 0.00 | 152.50 | 131.84 | 9/24/1984 | 2 | |
| 123 SUZYCH JILL | 318.61 | 0.00 | 81.75 | 179.61 | 9/19/1991 | 2 | |
| 351 GSANB ELIZABETH | 320.70 | 0.00 | 280.50 | 19.20 | 8/1/1998 | 1 | |
| 246 MIYZINYC PAULA | 320.97 | 0.00 | 198.25 | 100.72 | 8/15/1996 | 9 | |
| 367 GSYFFYBH DEAN | 321.90 | 0.00 | 280.15 | 3.00 | 11/10/1998 | 1 | |
| 192 WYLLASD EVEARD | 335.87 | 0.00 | 238.75 | 63.62 | 9/20/1982 | 1 | |
| 189 JACKCUN KAREN | 346.11 | 0.00 | 227.75 | 118.36 | 8/24/1995 | 9 | |
| 198 CAASY DAVID | 350.12 | 0.00 | 193.75 | 132.12 | 8/24/1995 | 12 | |
| 382 PUWLAC FRANCES | 359.13 | 0.00 | 289.75 | 13.38 | 10/12/1998 | 1 | |
| 242 HALLAY ROBERT | 360.38 | 0.00 | 326.50 | 33.88 | 8/15/1996 | 4 | |

Figure 8-53. The Driver Field Trip Hours Report



About the Driver / Schedule Field Trip Hours Report

While similar to The Driver Field Trip Hours Report, The Driver / Schedule Field Trip Hours Report (Figure 8-55) differs in one key way; it focuses on the schedule. The Driver / Schedule Field Trip Hours Report will list all the drivers in the selected schedule(s) as well as their total field trip hours. These total field trip hours can either be for all field trips or just field trips for that particular schedule. The Driver Field Trip Hours Report will list each employee's total field trip hours or total field trip hours for a particular schedule and the five components that make up a driver's field trip hours:

Base Hours: These are the hours that you have entered in the Employee screen or the Employee Schedule screen. These hours are used to give a number of hours to a new driver that comes into the district in the middle of the year and therefore, has no field trip hours. To prevent T.O.M. from giving this new driver almost all field trip assignments until he / she *caught up* in field trip hours with the other drivers you can enter the average number of field trip hours the other drivers had at the time the driver started.

Assigned Hours - Actual: This is the total hours of the field trips that the driver was assigned to that has actual hours recorded for the driver.

Assigned Hours- Estimated: For those field trips that the driver is assigned to but has not logged actual hours in, T.O.M. will use the field trip's estimated hours. The total of all field trips that the driver is assigned to without actual hours is represented in this figure.

Refused Hours - Actual: When a driver is assigned to a field trip and then later refuses the field trip he / she is still charged for the field trip assignment as if they actually performed the field trip. If the other drivers that actually performed the field trip have their actual hours logged for a field trip that another driver refused, the refusing driver is charged that *average of all the employees assigned to the trip's actual hours*. The total of these hours is represented in this figure.

Refused Hours - Estimated: For those field trips that the driver has refused that do not have any actual hours logged in by the drivers that actually performed the field trip, T.O.M. will use the field trip's estimated hours. The total of all field trips that the driver has refused without actual hours is represented in this figure.

Using the Driver / Schedule Field Trip Hours Report Screen

The Driver / Schedule Field Trip Hours Report screen (Figure 8-54) allows you to select the schedules you wish to include in the report. Schedules can be added and removed from the selected list on at a time or all at once. 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 Management Reports* previously described in this chapter for details.) Figure 8-55 shows a sample report.

Recalculate Employee Field Trip Hours Before Running Report: Because there are so many factors and situations that affect a driver's total field trip hours T.O.M. does not keep track of this total as it's performing various field trip operations. Rather, T.O.M. will periodically recalculate every driver's field trip hours from the beginning. Depending on your district's size and the speed of your computer and network this can be somewhat time consuming. This checkbox allows you to control whether T.O.M. will perform this recalculation before printing the report.

In general, it is a good idea to let T.O.M. recalculate the driver's field trip hours before printing this report. That way you can be sure you have the most up to date information on your report. However, if you know for example, that T.O.M. had just perform this recalculation for a previous function and the recalculation process can be rather long then you may choose to UNCHECK this field and have T.O.M. bypass this step.



Driver / Schedule Field Trip Hours Report

Select the schedules that you wish to include in this report.

| Schedules | | Selected schedules: | |
|-----------|------------------------|---------------------|------------------------|
| MD | MID-DAY 8:30 - 2:30 | MD | MID-DAY 8:30 - 2:30 |
| SP | SPECIAL ED DRIVER | SP | SPECIAL ED DRIVER |
| WD | WEEK-DAY AFTER 2:00 pm | WD | WEEK-DAY AFTER 2:00 pm |
| WE | WEEKEND OR HOLIDAY | WE | WEEKEND OR HOLIDAY |
| HD | HOLIDAY | | |
| SS | SUMMER | | |
| Test | Brett's test schedule | | |

Recalculate employee field trip hours before running report:

Report Hours On:

Email Report:
 Report to File:

Figure 8-54. The Driver / Schedule Field Trip Hours Report Screen

Selected Schedules: These are the schedules that you want to report on. T.O.M. allows you to group your drivers into lists called schedules. You then can select which schedule or schedules T.O.M. is to use when automatically assigning drivers to a field trip. You may choose to print this report for one, some or all schedules.

T.O.M. makes this an easy process by displaying one list of ALL the schedules that you have created and then another list of those schedules that you want to report on. Use the Select All, Deselect All, Add>> and <<Remove buttons to move schedules to and from the selected list. For example, to add a schedule to the list of selected schedules, click on the schedule in the Schedules list and then click the Add>> button. The schedule you selected will be added to the Selected Schedules list.

NOTE: The Select All button is useful if you wish to report on all but a few schedules. Click the Select All button and then click the Add>> button to add all the schedules to the Selected Schedules list. Then individually select each schedule you *don't* want in the Selected Schedules list and click the <<Remove button.

NOTE: If for some reason the schedules in the list of all your schedules do NOT match your schedules then click the Refresh List button to rebuild the list of all schedules in the list to include only the schedules that you have created.

Report Hours On: This is a toggle button field. That means you click the button of the option that you wish to choose. If you click the Employee button you are telling T.O.M. to calculate total field trip hours



and the five components of the total field trip hours for all field trips regardless of schedule for each employee in the schedule. T.O.M. will then sort the Employee / Schedule Field Trip Hours Report in ascending order (smallest to largest) by the employee's total field trip hours.

However, if you click the Employee / Schedule button you are telling T.O.M. to calculate the total field trip hours and five components of the total field trip hours for ONLY field trips using that specific schedule. T.O.M. will also print the employee's total field trip hours for all field trips regardless of schedule but will not calculate the breakdown of those hours by the five components. T.O.M. will then sort the Employee / Schedule Field Trip Hours Report in ascending order (smallest to largest) by the employee / schedule total field trip hours.

When you use T.O.M. to automatically assign field trips using the *Hours Averaging* methodology you still tell T.O.M. which list(s) of drivers to use. So you are restricting which drivers can average the field trip hours among. More than likely you will have more than one schedule and not all drivers will be on all schedules. In this environment T.O.M. will NEVER be able to give even close to equal field trip hours to all drivers that drive field trips. The best that T.O.M. can do is give around the same number of hours to all drivers in each schedule. It is only natural then that you would want to organize your driver field trip hours by schedule.

T.O.M. let's you choose two different ways to automatically assign drivers to field trips using the *Hours Averaging* method:

- Average Hours For All Field Trips
- Average Hours For Field Trips Within Each Schedule

Let's look at an example to understand how these two methods will impact how field trips are assigned. The Gecko school district has three schedules Mid Day, Week Day and Week End. Bill Ring is a driver for Gecko who only drives Week End field trips. Cathy Pen is another driver who will drive any field trip that the district offers her. Bill is only on the Week End schedule. Cathy is on all three schedules.

Let's assume that Gecko instructs T.O.M. to average hours for ALL field trips. In this case most field trip would be assigned to Bill rather than Cathy. This is because Cathy is taking field trips through out the week while Bill is only taking field trips on weekend. Naturally, Cathy's total field trip hours will most likely be greater than Bill's and T.O.M. will continually try and increase Bill's hours by awarding him most of the weekend field trips. This may or may not be fair to Cathy and Bill.

Now let's assume that Gecko instructs T.O.M. to average hours for field trips WITHIN each schedule. Now both Bill and Cathy will have roughly the same number of hours in weekend field trips. Cathy's total field trip hours for all schedules, however, will greatly exceed Bill because she is taking field trips during the mid days and weekdays and Bill is not. Again, this may or may not be fair to Cathy and Bill. It is really a matter of your district deciding on its philosophy and running T.O.M. to reflect that philosophy.

How you tell T.O.M. to average you field trip hours is how you will tell T.O.M. to run this report. If you average hours for ALL field trips then you will most likely choose the Employee button. If, however, you average hours within each schedule then you will most likely choose the Employee / Schedule button.

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PARADISE VALLEY SCHOOL DISTRICT # 69
Driver / Schedule Field Trip Hours Report

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| Employee | Schedule | Total Hours | | Base Hours/ Trip Hours | Assigned Hours | | Refused Hours | | Hire Date/ Seniority |
|----------|----------|-----------------------|----------|---------------------------|----------------------|----------------------|-------------------------------|------------|-------------------------|
| | | Schedule/ Employee | Employee | | Actual/ Estimated | Actual/ Estimated | Actual Average / Estimated | | |
| 344 | MD | PUPPINBISGIS WILLIAM | 266.71 | 0.00 | 242.75 | 19.21 | 0.00 | 4/27/1998 | 1 |
| 334 | MD | GSIIN BENDRAMINA | 312.88 | 0.00 | 284.00 | 7.63 | 0.00 | 8/10/1998 | 1 |
| 152 | MD | GULBSUNCIN KATHY | 320.50 | 0.00 | 297.75 | 13.25 | 0.00 | 10/13/1993 | 2 |
| 173 | MD | BILYCH ARTHUR | 326.94 | 0.00 | 290.25 | 17.19 | 2.00 | 8/26/1994 | 1 |
| 202 | MD | LANGLIJ JAMES | 359.13 | 0.00 | 249.50 | 73.62 | 13.00 | 10/17/1995 | 2 |
| 245 | MD | BUMLYNCUN GERALD | 381.32 | 0.00 | 370.59 | 10.73 | 0.00 | 8/15/1996 | 8 |
| 298 | MD | SUCK BRIAN | 400.17 | 0.00 | 313.00 | 54.92 | 6.75 | 8/29/1997 | 1 |
| 197 | MD | MISKLI ALAN | 437.00 | 0.00 | 413.00 | 9.00 | 0.00 | 5/8/1995 | 2 |
| 302 | MD | HANCIN MELLANNIE | 459.63 | 0.00 | 440.75 | 2.63 | 0.00 | 9/15/1997 | 1 |
| 272 | MD | WIYCINBUSGIS KIM | 461.63 | 0.00 | 433.25 | 8.63 | 0.00 | 8/9/1997 | 1 |

Figure 8-55. The Driver / Schedules Field Trip Hours Report



Working with the Driver Allowance Report

The Driver Allowance Report (Figure 8-57) is for those districts that assign drivers to trips using the Bid Allowance method. The Driver Allowance Report is meant to help those districts keep track of drivers bid points. If your district does not use the Bid Allowance method of assigning drivers, you won't need to use this report.

To print the Driver Allowance Report, select the Management Reports menu and then click the Driver Allowance Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Driver Allowance Report screen is displayed (Figure 8-56).

Figure 8-56. The Driver Allowance Report Screen

This screen allows you to enter a date range of field trips to include on this report. This screen also allows you to specify a specific employee or all employees. 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 Management Reports* previously described in this chapter for details.) Figure 8-57 shows a sample report.

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.

Employee: You may select a specific employee to print a report for if you like. Enter the number of the employee that you wish to report on here or leave this field blank for all employees. If you don't know the number of the employee that you desire then click on the down arrow to the right of the selected employee field. A drop down list of all of your employees will appear and allow you to select one of these employees for the report.

Print All Employees: Check this checkbox if you wish to print the report for all employees. The report prints all employees even if an employee is selected in the Employee field.

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.

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| Employee | Trip | | | | Bid |
|---|-----------|-----------------------|----------|--|-----------------------------------|
| 2/25/00 | | | | | |
| PARADISE VALLEY SCHOOL DISTRICT # 69 | | | | | |
| Page: 1 | | | | | |
| Allowance Report | | | | | |
| Selected Employee: ALL | | | | | |
| Selected Date Range: 1/1/2000 - 2/31/2000 | | | | | |
| ALEXANDER, LILLIAN | | | | | |
| 10237 | 3/15/2000 | CELEBRITY THEATER | Assigned | | 100 |
| | | | | | Current Bid Allowance: 400 |
| ALLEN, ANITA | | | | | |
| 9994 | 4/26/2000 | PHOENIX ZOO | Assigned | | 100 |
| 10245 | 4/27/2000 | SYMPHONY HALL | Assigned | | 100 |
| | | | | | Current Bid Allowance: 300 |
| BARBANO, SHARON | | | | | |
| 9188 | 4/28/2000 | ARIZONA STATE CAPITAL | Assigned | | 100 |
| 9879 | 4/26/2000 | PHOENIX SYMPHONY HALL | Assigned | | 100 |
| | | | | | Current Bid Allowance: 300 |
| BARR, ROZALINA | | | | | |
| 10211 | 3/15/2000 | CELEBRITY THEATER | Assigned | | 100 |
| | | | | | Current Bid Allowance: 400 |
| CASE, KATHLEEN | | | | | |
| 10211 | 3/15/2000 | CELEBRITY THEATER | Assigned | | 100 |
| | | | | | Current Bid Allowance: 400 |
| CASKEY, KENNETH | | | | | |
| 9864 | 4/27/2000 | SYMPHONY HALL | Assigned | | 15 |
| | | | | | Current Bid Allowance: 485 |
| COMAN, NANCY | | | | | |
| 9703 | 3/15/2000 | DESERT WINDS NURSERY | Assigned | | 50 |
| | | | | | Current Bid Allowance: 450 |
| HIBBLE, MARILYN | | | | | |
| 9790 | 3/15/2000 | Bowling/-SHEA | Assigned | | 200 |
| | | | | | Current Bid Allowance: 300 |

Figure 8-57. The Driver Allowance Report



Working with the Money Transaction Report

The Money Transaction Report (Figure 8-59) allows you to print a detailed accounts receivable activity log of all money transactions that affected a field trip or that a customer made during a certain time period. You can select a specific date range to run the report. You can also specify a selected customer and a specific money transaction type. For example, you can run a report that answers the question: “How many payments (transaction type) did Echo Mountain Elementary (customer) make this year (date range)?”

To print the Money Transaction Report, select the Management Reports menu and then click the Money Transaction Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Money Transaction Report screen is displayed (Figure 8-58).

Figure 8-58. The Money Transaction Report Screen

This screen allows you to enter a date range of when the transaction was *posted* to include on this report. This screen also allows you to specify a specific customer and transaction code, if you wish. 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 Management Reports* previously described in this chapter for details.) Figure 8-59 shows a sample report.

Transaction Date Range: This field specifies the date range for when the money transaction was *posted*. 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.



Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer's number will appear in the Customer field. If you leave this field blank all customers will be selected for this report. Click the Customer button if you need to look up the customer using an alphabetical lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

Transaction Code: This is the number that you assigned to the Money Transaction Type. If you don't know the transaction code, click the down arrow next to the Transaction Code field and a list of all your transaction codes will appear in alphabetical order. Click on the transaction code to select it; the transaction code will appear in the Transaction Code field. If you leave this field blank all transaction codes will be selected for this report. See *Chapter 3 – Entering Lookup Lists* in the *T.O.M. Getting Started Guide* for details about creating money transaction codes.

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Money Transaction Report

| Trip # | Transaction Type | Date | Fund | Amount | Check # |
|--|----------------------------------|----------|------|-------------------|---------|
| 112 | SONORAN SKY- T-BIRDS | | | | |
| 7788 | BIL BILL | 2/4/99 | 16 | \$425.00 | |
| 9736 | BIL BILL | 12/21/99 | 16 | \$344.10 | |
| 7030 | BIL BILL | 2/4/99 | 16 | \$107.20 | |
| 8260 | TRF TRANSFER | 7/29/99 | 16 | (\$44.95) | |
| 7179 | TRF TRANSFER | 2/2/99 | 16 | (\$47.60) | CS1090 |
| 7788 | TRF TRANSFER | 3/4/99 | 16 | (\$425.00) | CS1090 |
| 8260 | BIL BILL | 4/12/99 | 16 | \$44.95 | |
| 7030 | TRF TRANSFER | 3/4/99 | 16 | (\$107.20) | CS1090 |
| Summary for SONORAN SKY- T-BIRDS (8 Transactions) | | | | \$296.50 | |
| 115 | CAMPO BELLO /EAGLE CLUB | | | | |
| 7905 | TRF TRANSFER | 3/4/99 | 16 | (\$33.45) | CS1090 |
| 7530 | TRF TRANSFER | 2/2/99 | 16 | (\$377.40) | CS1090 |
| 7905 | BIL BILL | 3/4/99 | 16 | \$33.45 | KB |
| 7530 | BIL BILL | 1/18/99 | 16 | \$377.40 | |
| 8262 | BIL BILL | 4/12/99 | 16 | \$45.20 | |
| 9524 | BIL BILL | 10/28/99 | 16 | \$4.80 | |
| 8262 | TRF TRANSFER | 7/29/99 | 16 | (\$45.20) | dk |
| Summary for CAMPO BELLO /EAGLE CLUB (7 Transactions) | | | | \$4.80 | |
| 117 | LIBERTY ELEM/PATRIOT CLUB | | | | |
| 7197 | TRF TRANSFER | 7/29/99 | 16 | (\$38.00) | |
| 7028 | BIL BILL | 2/4/99 | 16 | \$96.75 | |
| 7183 | TRF TRANSFER | 2/2/99 | 16 | (\$26.20) | CS1090 |
| 6976 | TRF TRANSFER | 7/29/99 | 16 | (\$28.25) | |
| 6976 | BIL BILL | 2/4/99 | 16 | \$28.25 | |
| 7028 | TRF TRANSFER | 3/4/99 | 16 | (\$96.75) | CS1090 |
| 7198 | TRF TRANSFER | 2/2/99 | 16 | (\$445.05) | CS1090 |
| Summary for LIBERTY ELEM/PATRIOT CLUB (7 Transactions) | | | | (\$509.25) | |
| 118 | BOULDER CREEK ELEM. | | | | |
| 7293 | BIL BILL | 1/18/99 | 8 | \$104.75 | |
| 7290 | PAY Payment | 3/16/99 | 8 | (\$93.80) | 53294 |
| 7293 | PAY Payment | 3/16/99 | 8 | (\$104.75) | 53294 |
| 7165 | PAY Payment | 3/16/99 | 8 | (\$94.25) | 53294 |

Figure 8-59. The Money Transaction Report



Working with the Driver Notes Report

The Driver Notes Report (Figure 8-61) allows you to retrieve notes made about a driver's performance or refusal for various field trips. There are many uses of this combination of notes and report. The primary use is to allow a district an opportunity to enter notes about a driver's performance for a specific field trip. However, they can also allow the district a chance to make comments about why a driver refused a trip or was manually passed or canceled from a trip.

The driver notes are secured; only authorized personnel are permitted to view and work with them.

To print the Driver Notes Report, select the Management Reports menu and then click the Driver Notes Report option (Figure 8-1). (See *Accessing the Management Reports* at the beginning of this chapter for details.) The Driver Notes Report screen is displayed (Figure 8-60).

Figure 8-60. The Driver Notes Report Screen

This screen allows you to enter a date range of when the field trip took place to include on this report. This screen also allows you to specify a specific employee and customer, if you wish. 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 Management Reports* previously described in this chapter for details.) Figure 8-61 shows a sample report.

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.

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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.

Employee: You may select a specific employee to print a report for if you like. Enter the number of the employee that you wish to report on here or leave this field blank for all employees. If you don't know the number of the employee that you desire then click on the down arrow to the right of the selected employee field. A drop down list of all of your employees will appear and allow you to select one of these employees for the report.

Customer: This is the customer number of a specific customer that you want to report on. If you don't know the customer number click the down arrow next to the Customer field and a list of all your customers will appear in alphabetical order. Click on the customer name to select it; the customer's number will appear in the Customer field. If you leave this field blank all customers will be selected for this report. Click the Customer button if you need to look up the customer using an alphabetical lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

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Driver Notes Report

| Trip # | Date | Employee | Customer | Destination | Driver Performance Notes |
|--------|----------|----------------------------|-----------------------------|-----------------------------|---|
| 10143 | 12/28/99 | BAYLUS, ANN | SHADOW MOUNTAIN HIGH SCHOOL | GILBERT HIGH SCHOOL | Teacher called to say that driver dropped them off at destination but was 45 minutes late picking them up. Driver did not have an acceptable excuse when asked about this. |
| 10139 | 12/13/99 | BHUMCUN, SANDRA | SHADOW MOUNTAIN HIGH SCHOOL | CORONA DEL SOL HIGH SCHOOL | Teacher called to complement on driver's performance. |
| 10140 | 12/8/99 | HUWASBH, ESTELLE | SHADOW MOUNTAIN HIGH SCHOOL | DESERT MOUNTAIN HIGH SCHOOL | Teacher called to complain about an incident where driver had a argument with one of the parent volunteers that got rather heated in front of the children. Teacher said that it was very upsetting to kids and feels that driver was unprofessional. |
| 10138 | 1/7/00 | CAUNDISC, SUSAN | SHADOW MOUNTAIN HIGH SCHOOL | PARADISE VALLEY HIGH SCHOOL | Refused trip a day before departure because of personal reasons. |
| 10142 | 12/8/99 | BHUMPCUN-CIVISCUN, DEBORAH | PARADISE VALLEY HIGH SCHOOL | VALLE LUNA RESTURANT | Parents called to complement driver on performance. |
| 10144 | 12/16/99 | CAKCIY, KENNETH | SHADOW MOUNTAIN HIGH SCHOOL | FLAGSTAFF HIGH SCHOOL | Zoo called to complain about driver parking in unauthorized zone and driver being rude when informed that the driver needed to move the bus. |
| 10141 | 12/8/99 | CMYBH, TERRI | SHADOW MOUNTAIN HIGH SCHOOL | ALHAMBRA HIGH SCHOOL | Driver was late for field trip. |
| 10145 | 12/11/99 | CCHWIYBZIS, SHOSHANA | SHADOW MOUNTAIN HIGH SCHOOL | ASU Recreation Center | Teacher called to complain about driver being rude to teacher and children during trip. |
| 10138 | 1/7/00 | CCHWIYBZIS, SHOSHANA | SHADOW MOUNTAIN HIGH SCHOOL | PARADISE VALLEY HIGH SCHOOL | Was late arriving for work and, therefore, late for trip - teacher complained. |
| 10148 | 12/11/99 | GACPASSU, FRANCES | PARADISE VALLEY HIGH SCHOOL | ARIZONA STATE UNIVERSITY | Coach called to say driver was great. Said the game went long and the team had a special practice afterwards and that the driver was very flexible and did not complain. |
| 10149 | 12/11/99 | SUCINBISG, BARRY | PARADISE VALLEY HIGH SCHOOL | MINGUS HIGH SCHOOL | Driver refused trip assignment on day of trip. |

Figure 8-61. The Driver Notes Report