

## Appendix A

# Lookup Pages

WebTrips uses flexible lookup pages to allow you to search for customers, funds and destinations if you don't know which one to select.

## Searching for a Customer Using the Customer Lookup Page

As you are completing the information on the field trip Request Detail page (Figure A-1), if you are not a school user you will need to enter a customer for your trip in the Customer field. You can select the customer by clicking the drop-down arrow and choosing the customer number from the list.

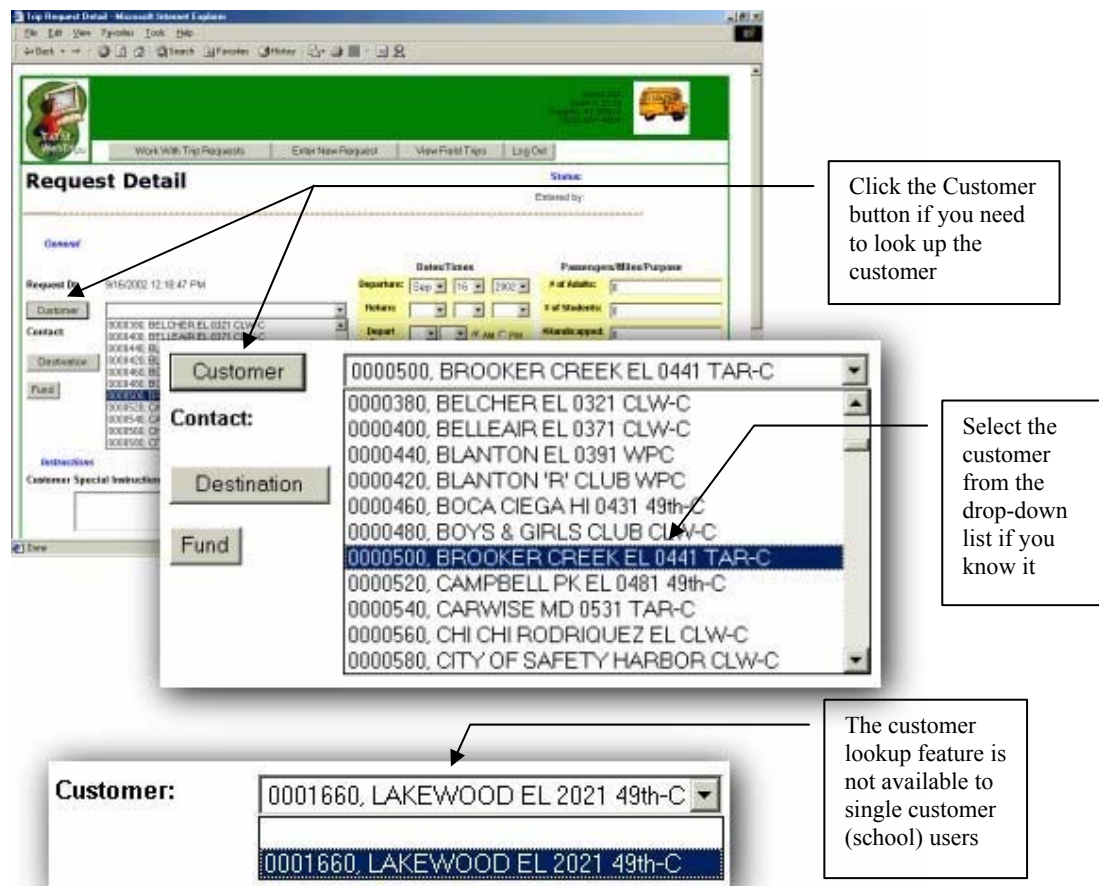


Figure A-1. Click the Customer button if you need to search for a customer by name

However, if you don't know the billing customer number, you can click the Customer button and search for the customer name using the Customer Lookup page (Figure A-2). Searching can also be faster than scrolling if you have a lot of customers.

**Note:** If your logon is connected to only one customer (school), your school will be the only one in the drop-down list, and the Customer button will not appear on your page.



1. From the field trip Request Detail page (Figure A-1), click the Customer button. The Customer Lookup page is displayed (Figure A-2).
2. Enter all or part of the customer name in the Customer Description field. If you enter part of the customer name, it must be the beginning part. For example, enter "ARIZONA" or "ARIZ" (without the quotes) as part of all customer names that begin with "ARIZONA."

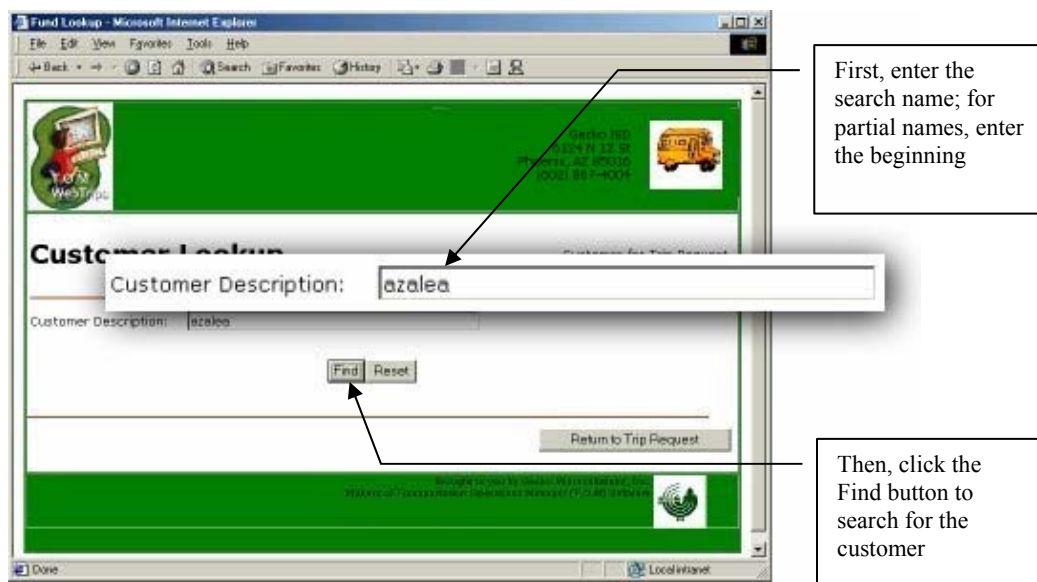


Figure A-2. Enter all or part of the beginning of a customer name

3. Click the Find button. If a match is found, the customer name(s) is displayed in a list at the bottom of the Customer Lookup page (Figure A-3). You may have to scroll down to see the complete list.

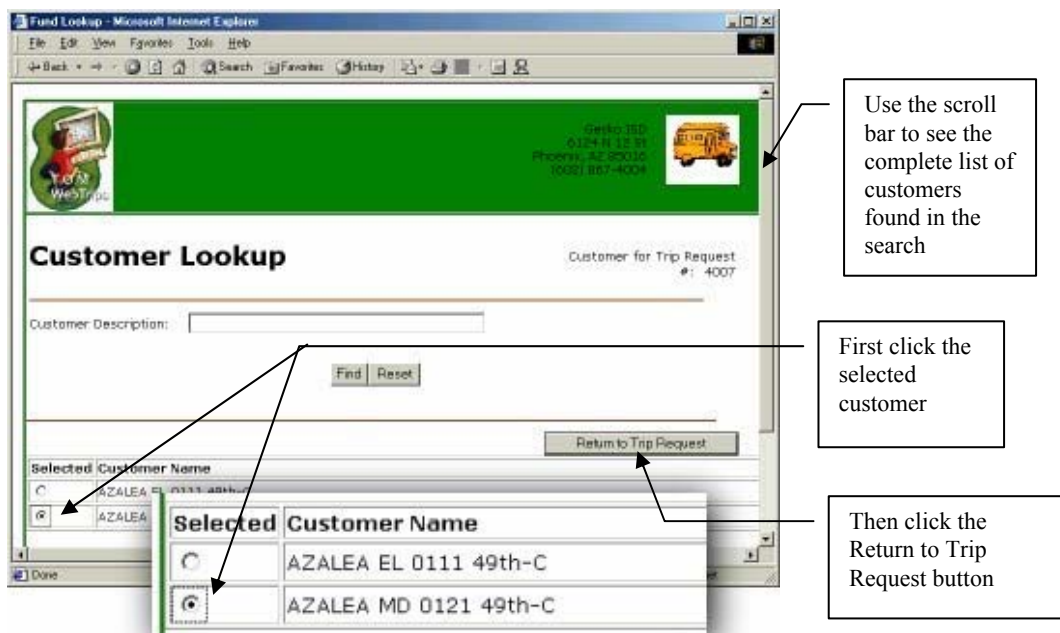


Figure A-3. Customer names that match the search description are displayed in a list



- To select a customer, click on the appropriate button in the Selected column and then click the Return to Trip Request button, as shown in Figure A-3. The customer name appears in the field trip Request Detail page (Figure A-4).

The customer you selected in the Customer Lookup page is now displayed in the field trip Request Detail page

Figure A-4. Customer name placed in the Request Detail page from the Customer lookup selection

## Working with the Destination Lookup Page

As you are completing the information on the field trip Request Detail page (Figure A-5), you will need to enter a destination for your trip in the Destination field. You can enter an existing destination by clicking the drop-down arrow and choosing the destination from the list.

Click the Destination button if you need to look up the destination

Select the destination from the drop-down list if you know it

Figure A-5. Click the Destination button if you need to search for a destination by name



However, if you don't know the destination number or name, you can click the Destination button and search for an existing destination using the Destination Lookup page (Figure A-6). Searching can also be faster than scrolling if you have a lot of destinations.

1. From the field trip Request Detail page (Figure A-1), click the Destination button. The Destination Lookup page is displayed (Figure A-6).
2. Enter all or part of the destination in the Destination Description field. If you enter part of the destination name, it must be the beginning part. For example, enter "ARIZONA" or "ARIZ" (without the quotes) as part of all destinations that begin with "ARIZONA."

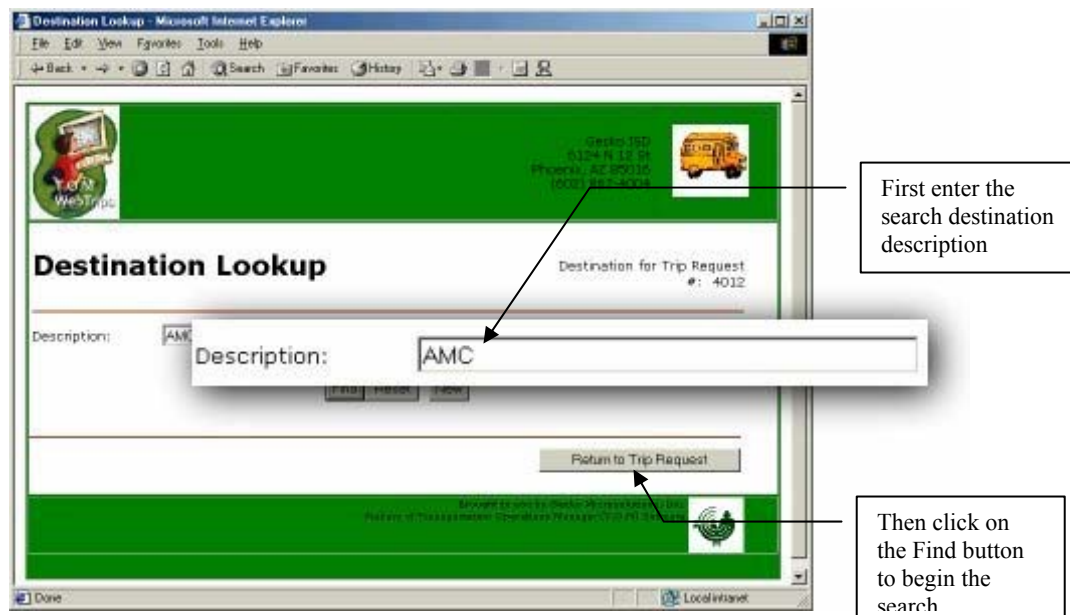


Figure A-6. Enter all or part of the beginning of a destination name

3. Click the Find button. If a match is found, the destination(s) is displayed in the Destination Lookup page (Figure A-7). You may have to scroll down to see the complete list.

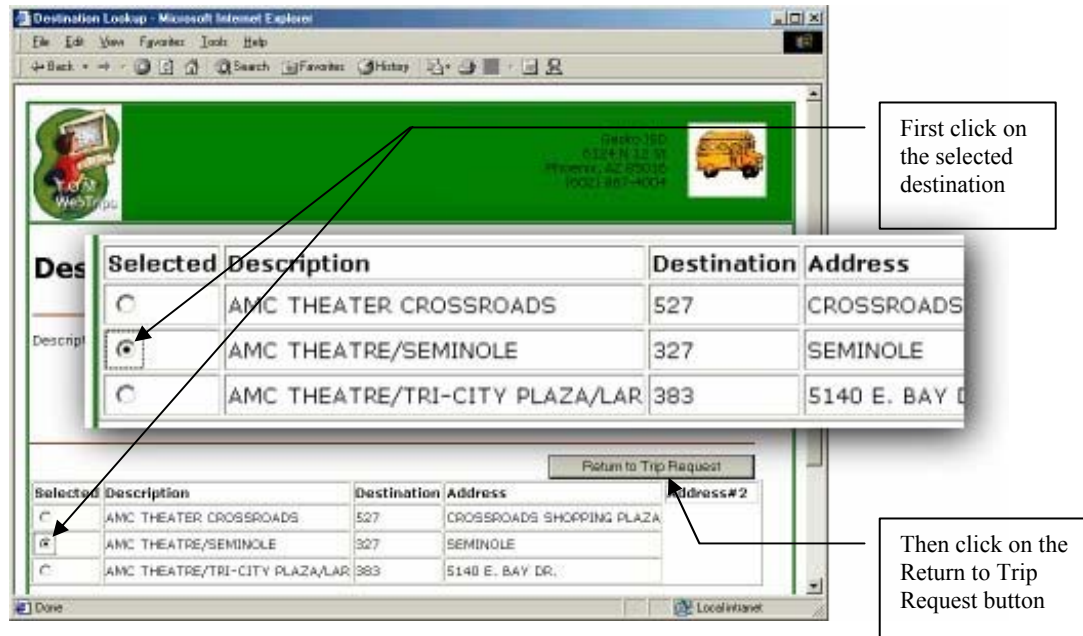


Figure A-7. Destinations that match the search are displayed in a list

- To select a destination, click on the appropriate button in the Selected column and then click the Return to Trip Request button, as shown in Figure A-7. The destination appears in the Request Detail page (Figure A-8).

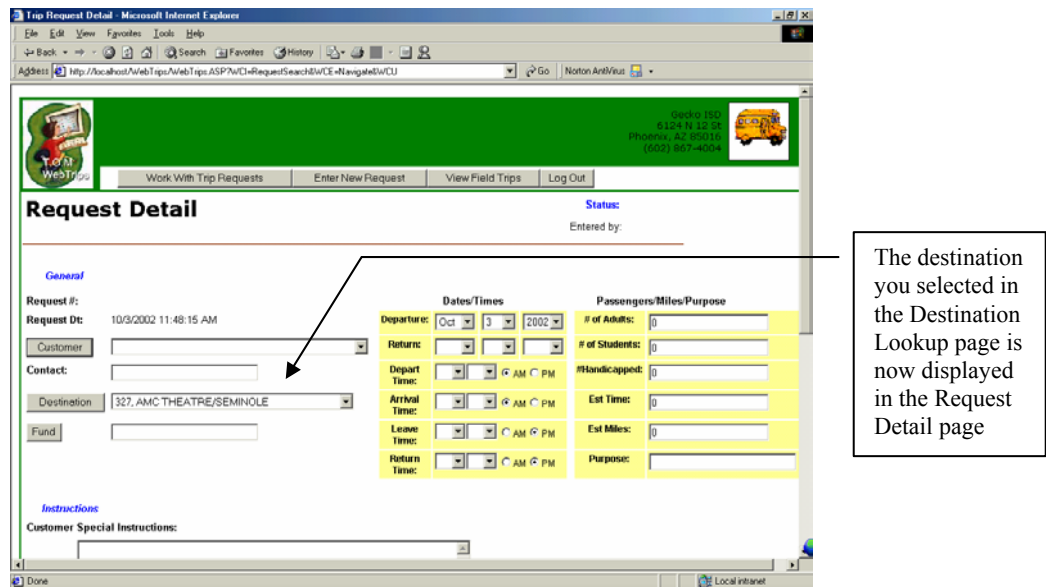


Figure A-8. Destination placed in the Request Detail page from the Destination lookup selection



**T.O.M. Tip**

### A Word About Destinations

When you select an existing destination, WebTrips places the destination's number, name, address, and any special instructions set up for that destination in the Field Trip Request page. This is a great way to reuse information, reduce the opportunity for errors in addresses or locations, and relieves you of tedious repetitive typing!





### What if the place you need to go does not already exist?

As a user, you may need to create a new destination while entering a field trip request. WebTrips allows you to enter a new name and address for the place you need to go, but does not immediately create this new destination in the Transportation Department's list of destinations. When the Transportation Department reviews the trip request, they can do one of two things. They can:

- Department's list and available for others to use again. OR
- prevents the school from accidentally creating multiple destination records to the same physical location.

For more information, see *Creating a New Destination* in *Chapter 4: Entering a Field Trip Request*.

## Searching for a Fund Using the Fund Lookup Page

As you are completing the information on the field trip Request Detail page (Figure A-11), you may wish to enter a fund for your trip in the Fund field. WebTrips allows you to enter the fund directly on the Request Detail Screen or lookup the appropriate fund number.

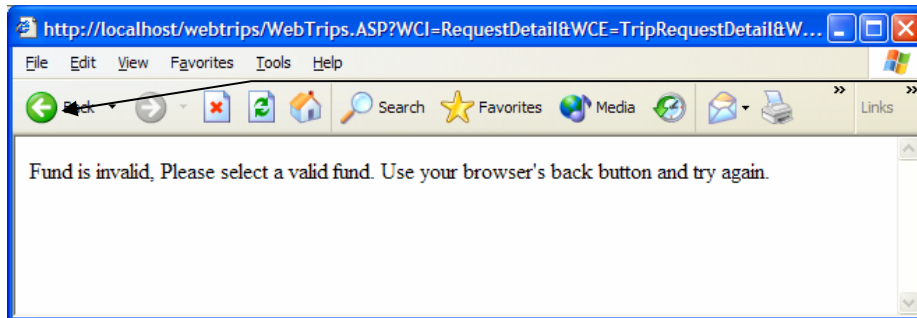
If you enter the fund directly on the Request Detail Screen, WebTrips will validate that the fund number exists and is active before allowing you to successfully save the trip request.

The screenshot shows the 'Trip Request Detail' page in Microsoft Internet Explorer. The page has a green header with the text 'All trip requests must be submitted at least 2 week prior to departure date.' and a navigation bar with buttons: 'Work With Trip Requests', 'Enter New Request', 'View Field Trips', and 'Log Out'. The main content area is titled 'Request Detail' and shows the status 'UNAPPROVED 2/7/2003 3:01:57 PM' and 'Entered by: madison1 5/14/2002 1:19:03 PM'. The form is divided into sections: 'General' and 'Other'. The 'General' section includes fields for 'Request #', 'Request Dt', 'Customer', 'Contact', 'Destination', and 'Fund'. The 'Other' section includes fields for 'Internal Trip #', 'Trip Category', and 'Grade'. The 'Fund' field is highlighted with a callout box that says 'Enter the fund number if you already know it and Save the Trip Request'. The 'Save' button is also highlighted with a callout box.

Figure A-9. Enter the Fund number if known, and save the request



If WebTrips determines the fund number you entered is invalid (does not exist or is inactive), a message will be provided (Figure A-10). Use your browser's back button to reenter a valid Fund.



If you entered an invalid fund, click Back to return to the Request Detail page and try again.

Figure A-10. WebTrips will not allow Invalid Funds

Due to security and performance concerns, the fund number is not accessible via a drop down selection. However, if you don't know the fund number, you can click the Fund button (Figure A-11) and search for the fund using the Fund Lookup page (Figure A-12).

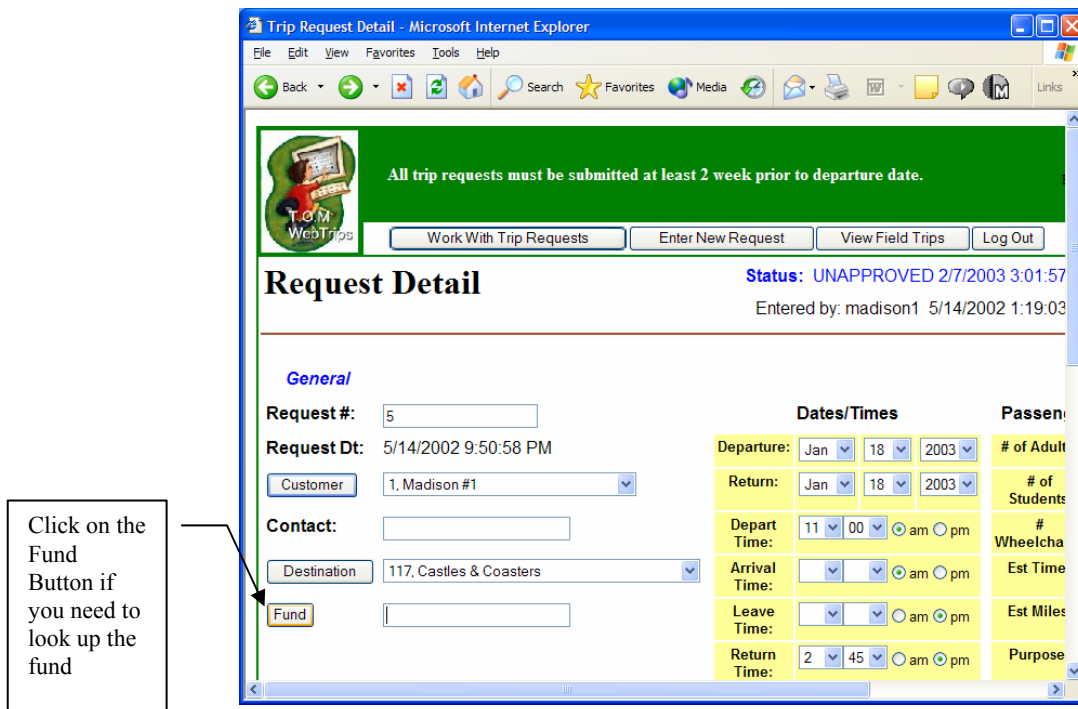


Figure A-11. Click the Fund button if you need to search for a fund

You can search by either fund number or by the fund's description. You can only search for funds that have an Active status.

1. From the field trip Request Detail page (Figure A-11), click the Fund button. The Fund Lookup page is displayed (Figure A-12).



2. Enter your search criteria as follows:

- To search by the fund number, enter all or part of the fund number in the Fund # field (*Figure A-12*). If you enter part of the description, it must be the beginning part. For example, enter “ARIZONA” or “ARIZ” (without the quotes) as part of all funds that begin with “ARIZONA.”
- To search by fund description, enter all or part of the description in the Description field (*Figure A-13*). If you enter part of the description, it must be the beginning part. For example, enter “ARIZONA” or “ARIZ” (without the quotes) as part of all funds that begin with “ARIZONA.”

**Fund Lookup**

Fund #:

Description:

Fund Status: Active: ☐

Selected	Fund	Description	Subtracted from Budget	Active
<input type="radio"/>	1	in district	True	True

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To search by fund number, first enter the search fund number; for partial names, enter the beginning few letters

Then, click the Find button to search for the fund

Figure A-12. Searching for the fund by fund number

**Fund Lookup**

Fund #:

Description:

Fund Status: Active: ☐

Selected	Fund	Description	Subtracted from Budget	Active
<input type="radio"/>	4	tax credit	True	True
<input type="radio"/>	7	Trans Fund	True	True

To search by fund description, first enter the search fund; for partial names, enter the beginning few letters

Then, click the Find button to search for the fund

Figure A-13. Searching for the fund by description





- Click the Find button. If a match is found, the fund(s) is displayed in the Fund Lookup page (Figure A-14). You may have to scroll down to see the complete list.

**Fund Lookup**

Fund #:

Description:

Fund Status: Active: ☐

Selected	Fund	Description	Subtracted from Budget	Active
<input type="radio"/>	4	tax credit	True	True
<input checked="" type="radio"/>	7	Trans Fund	True	True

First click the selected fund

Then click the Return to Trip Request button (either one)

Figure A-14. Funds that match the search are displayed in a list

- To select a Fund, click on the appropriate button in the Selected column and then click the Return to Trip Request button, as shown in Figure A-14. The fund name appears in the Request Detail page (Figure A-15).



Trip Request Detail - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Mail Links

**All trip requests must be submitted at least 2 week prior to departure date.**

Work With Trip Requests Enter New Request View Field Trips Log Out

## Request Detail

Status: UNAPPROVED 2/7/2003 3:01:57  
Entered by: madison1 5/14/2002 1:19:03

**General**

Request #: 5  
Request Dt: 5/14/2002 9:50:58 PM  
Customer: 1, Madison #1  
Contact:   
Destination: 117, Castles & Coasters  
Fund: 7, Trans Fund

**Dates/Times**

Departure: Jan 18 2003  
Return: Jan 18 2003  
Depart Time: 11 00 am  
Arrival Time: am  
Leave Time: am  
Return Time: 2 45 pm

**Passenger**

# of Adults  
# of Students  
# Wheelchair  
Est Time  
Est Miles  
Purpose:

The fund you selected in the Fund Lookup page is now displayed in the Request Detail page

Figure A-15. Fund name in the Request Detail page



**T.O.M. Tip**

### A Word About Setting Up Funds

If your district assigns sets of funds to each school and you want your school to be able to easily search for only THEIR funds here's a good tip. Have all school fund descriptions start with either the school's name or number. Then the school can just enter their name or number in the search page and have only THEIR funds display in the funds search results.