

QUICK REFERENCE GUIDE FOR REQUESTERS AND APPROVERS

Logging into TripTracker:

- * Go to website: hpsd.ca
- * **Staff**
- * **TripTracker**
- * Enter Network Username & Password (*your main computer Login & Password*)
- * **Check Box** to "Authenticate Using Network Credentials"
- **Note** *At any time you change your network/computer login password, the new password created will also be your password to log into TripTracker*

REQUESTERS: Requesting a Trip

- * Click on **Request a Trip**
- Fill in Trip Information – (note the Status is currently showing *Unsubmitted*)
- * **Trip Name** (*follow a naming convention that will allow you to easily find a trip if necessary*)
- * **Trip Date** (*use drop down*)
- * **Trip Type** (*use drop down & scroll through list or type first letter*)
- * **Activity Type** (*use drop down & scroll through list or type first letter*)
- * **Reason for Trip** (*optional--for additional information*)
- * **Account** (*use drop down and select appropriate account*). Account Notes will automatically fill in
- * **Requester** (*use drop down and select name*)
- * **Origin** (*use drop down & select starting point of trip*)
- * **Departure Date** *automatically fills in from entered trip date above*
- * **Departure Time** (*enter time and A or P for AM/PM as it will always default to AM*)
- * **Return Date** *will automatically fill in*. (If this is a multi day trip, use drop down & select return date ie: overnight trips)
- * **Return Time** (*enter time and A or P for AM/PM as it will always default to AM*)
- * **Destination** (*use drop down to see list of available destinations. You can type first few letters to jump to that location if on the list*). If your destination is **NOT** on the list:
 - * click on **Add a New Location** (*please ensure destination does not already exist as location may be in list but named differently*)
 - * Type in **Destination Information** and click on **Add Location**
- * **Arrival Date** *will automatically be filled in*
- * **Arrival Time** (*estimate the time of arrival of destination. Time must be later than your departure time from starting point of trip*)
- * **Departure Date** *will automatically be filled in*
- * **Departure Time** (*estimate time of departure. Time must be earlier than your return time above*)
- * Click **ADD** to add the destination.
- Follow the same steps to add multiple destinations to trip request
- * **Passenger Information:** **Fill in number of Adults, Students, Number of Wheelchair Bus and Number of Buses required for trip**
- * **Contact Name and Phone Number** (*name and number should be supervisor going on the trip*)
- * **Notes** (*type any additional details about the trip*)
- * **Submit** (*requests will not be submitted for approval if errors appear*) If request shows errors, fix and Submit again. If trip request was completed correctly, the Status of the trip will show REQUESTED. The trip is now awaiting for Approval (*usually by the Principal or Vice Principal*)

Emails will be automatically generated at each step of the Trip Process. Requesters can make changes to the request once it has been submitted but PRIOR to trip being Approved.

IF TRIP REQUEST STATUS IS APPROVED AND CHANGES NEED TO BE MADE, YOU WILL NEED TO CONTACT THE HPSD TRANSPORTATION OFFICE/BUS SHOP TO MAKE THE CHANGES

CLONING A TRIP

Cloning a trip makes it easy to request trips to the same location of recurring trips. Once you have requested the first trip and it is at the level of Requested or above, you can search your trip to find it, click on it to open and click Clone. This will bring up an Unsubmitted Trip Request that you can edit (date, times etc). Once you are done editing, click on Submit.

APPROVERS - Approving a Trip

Email notifications would have been emailed to you notifying a trip is ready for your approval.

- * **Trip Search** (screen opens with links to trips ready for approval)
- * **Trip Name** (*this opens the trip in the Trip Request screen and shows all trip information*)
You can view the trip estimate if it was completed and saved or you can perform the estimate
- * **Approve** (*You may click Reject only if you do not wish trip to proceed*)
Once you either Approve or Reject the trip, a Comments Box opens up so you may add any comments
- * **Approve Trip** (*or Reject Trip*)

The trip STATUS has now changed to either Approved or Rejected. If the trip was Approved, it is now ready for Scheduling by the Transportation Office/Bus Shop. If trip was Rejected, it is sent back to the Requester so they can review your comments as to why it was rejected, fix the problems and then Re-Submit the trip for approval or cancel the trip altogether.

TRACKING THE STATUS OF TRIP REQUEST

TripTracker allows you to see what stage the Status of a trip request at all times by clicking on **View Calendar**. Stages of trip Status are Requested, Approved, Scheduled and Cancelled.

For more detailed information on these or other topics, consult the online help or you can call Angie Zelman 780 523-9506 or Amy Whalen at 780 523-9507 at the Transportation Office/Bus Shop.