



# iTravel – Creator Step By Step

The iTravel system will replace the current paper forms for Field Trip and Professional Development Proposals. The electronic system will provide more a fluid process that will allow quicker approval time and reports for school administration. Users will be able to create a trip request, submit for approval and track the status of the request.

- 1) To access iTravel use the link on the District website under Staff – Teacher Resources or the link below
  - a. <https://apps.collierschools.com/travel>
- 2) Login using your normal network credentials. Enter your user name and password. Below the login page you will also see any new messages such as updates or announcements. If you cannot log in please contact your Office Manager for access.

**Login:**

User Name:

Password:

[Forgot Username / Password ?](#)

- 3) After successful login you will be presented with your homepage. You will see your menu at the top (1), messages and announcements on the right (2), and your quick access links on the left (3). To create a new Field Trip click on My Trips on the menu.

**iTravel** JOHN DOE July 14, 2014

Home My Trips Log Off Help

Welcome JOHN!

**My Trips** View Current trip proposals.

**My Group/Teams** Access and edit your group/teams. These are used in participant searches and email lists.

**My Messages** Show Previous

08/04/2014 iTravel Launch Date

- 4) On the My Trips page, you will see option to select a school year (1), create or search trips (2), multiple tabs including My Trips and Shared Trips (3), and also any previous created trips listed (4). The My Trips tab will show you trips that you have created and the Shared Trips tab will show trips others have created for you. We will cover the multiple actions that can be completed later in this document. To create a trip click on the New Trip button (2).



- 5) On the New Trip panel, select a new School Year, Location or School, Trip Type and enter a descriptive Trip Title. For this example we will create a Student Field Trip. Student Field trips include students and staff/employees, Personnel Training/Conference trips only include staff/employees. Click on the Create button to continue.

The 'New Trip' form is titled 'Please Select Trip Type and Enter a Title Below:'. It contains the following fields and options:

- School Year: 2014-2015
- Group/Location: Avalon Elementary
- Trip Type: Student Field Trip
- Trip Title: Conservatory Trip Mr. Banks Class

Below the Trip Title field are 'Create' and 'Cancel' buttons. A red question mark icon is visible next to the Group/Location field. A descriptive text block explains the trip types: 'Student Field Trip : This is a trip that involves students such as School or Field Trips. Personnel Training/Conference : This is a trip that involves only employees such as Conference or Training Trips.'

- 6) After clicking create you will be redirected to the Field Trip edit page. You will see an Action panel which will allow you to Save, Submit, or Cancel and a list of tabs including Information, Roster, Funding/Cost, and Attachments. To complete a field trip request, you will need to go through each tab and fill out required information (shown in next steps). At any time you can click the Save button to save your progress and return later to complete. Once the all the required fields in the tabs have been filled out, you can use the Submit button to submit your request for approval. If you missed any fields, you will be presented with a red validation box showing any required fields.

- 7) The first tab Trip Information will have general trip data including type of trip, date of trip, and destination information. The first field (1) is the Title of the trip. This is a descriptive title field to help identify the trip. The second field (2) is the Travel Type. In County covers Collier and Lee and will only usually only require school level approval. The In State and Out of State types will require school and district level approval. These all should be submitted 1 week to 6 months in advance depending on type. The location/school (3) should be your location that the trip is taking place. The occurrences (4) covers if this is a new trip request or if it is an annual/recurring trip. If it is a recurring trip it will request the date the last trip took place (5).

- 8) The next section Educational Info starts with the Category Type (1). You can select Educational for class or academic trips, Extra-Curricular Club for school club trips like Band or Key club, and the third selection is Extra-Curricular Athletic. You can select the type of club from the Options menu (2). Next you can select if it is STEM related and the type of STEM the trip falls under (3,4). Each trip will require a Purpose and Learning objective, which are short 1-3 sentences about the trip (5,6). Athletic trips will have alternative requirements shown by clicking the (?) question mark symbol. If you are creating an Athletic trip, you will need to select if it is a regular seasonal or non-regular seasonal trip.

**Educational Info**

Category:  1 Option:  2

STEM Related:  Yes  No 3

STEM Type:  Science  Technology  Engineering  Math 4

Purpose: Please enter the purpose and/or relevance for this trip.  5

Learning: Please enter how this trip is relevant to Education/Curriculum?  6

- 9) Next is the Trip Info section. Enter a departure and return date (1,2). Then enter the total TPD days required. Example if the trip occurs for 1 and ½ days, there would be a total of 1.5. Next select Yes or No for the Overnight, Water Related, Interrupts Testing, and if Retakes available (4-7). Testing only counts with High stakes testing. If retakes are not available, a reason will be required.

**Trip Info**

Departure Date:  Time:    1

Return Date:  Time:    2

Days TPD Total:  (TPD Days, Example 1.5) 3

Overnight:  Yes  No 4

Water Related:  Yes  No 5

Interrupts Testing:  Yes  No [Calendar](#) 6

Retakes Available:  Yes  No 7

- 10) The Transportation, Destination and Hotel sections are the last on this tab. Each trip will require one Transportation method and one Destination. Use the Add buttons to add your transportation, destination, and optional hotel items. You can add in multiple transportation types, including school bus/van, personal vehicle, airplane, and commercial bus/van (1). When selecting commercial bus or airplane, you still will need to list the Vendor name and phone (2). When selecting school bus, you will need to still make a separate request through Fleetranner, and you can list the Fleetranner Field Trip ID on field (3).

**Trip Transportation**

Transportation Type:  1

Vendor Name:  2 • Required for Airplane, Commercial Bus/Van/Car

Phone:  (Example: 2391234567)

FleetRunner Field TripId:  3

- FleetRunner requests for transportation are separate and must be requested as normal.
- FleetRunner requests can be accessed by [Clicking Here](#)

11) Next click on the Roster tab on the top. For each trip you will need to roster your Staff/Employees, Volunteers, and Students that are going on the trip. The left section is the quick picker and can be used to filter by location and grade to select employees or students (1). On the right, you will see who has been added to the roster for the trip (2). All trips will require a specific ratio of male and female chaperones to students. Athletic trips will have alternative requirements.

Trip Information | **Roster** | Funding / Cost | Attachments (0) | Private Notes (0)

Male Chaperones: 0 Female Chaperones: 0 Male Students: 0 Female Students: 0

**Find Member(s)**

Role Type:  1

Location:

**Members (0)**

No Roster Added. Use the Quick Select on the left to add members.

2

3

12) You can use the quick picker on the left to find multiple users. You can use the search section (3) to search for individuals using various methods. The search button will allow you to search using ID or first/last name. The Teams button will bring up any reusable teams you have created. The upload list button will allow you to paste in student or employee IDs to add to the roster. The class's button will become active after student schedules are available and allow you to roster a teacher's homeroom. Volunteers should be registered like usually, either level 1 or level 2. If they cannot be found or are TBA, you can use the TBA (Male) or TBA (Female). This may be required to meet chaperone requirements. Once you are finished, click on the Funding/Cost tab to continue.

13) The Funding/Cost tab will have basic information for budget location and cost per person. The only required fields are Cost Center (1) and Budget Source (2). If you are using a grant or specific budget source you can enter a Note, Project #, and Project Name (3-5). If there are costs such as Hotel, TD, or Registration you can click on the Edit Cost button to enter these (6). There is a multiplier next to each of these costs to reflect roster count.

14) After you have entered Funding/Cost information, click on the Attachment tab on the top. All trips will require attachments. Generally every trip will require (1) leave form for TPD and (1) agenda document. Leave forms must be already approved by local administrator, they can be all scanned in as 1 document (pdf). Athletic regular seasonal requests will require (1) athletic schedule. To attach a document, click on the Add Attach button.

Type	Uploaded By	Date	Title	Action
Leave Form	BRETT REYNOLDS	7/14/2014 1:36:08 PM	Document.pdf	Download Delete

15) Select the Type of attachment from the drop down list. Then click on Choose File and browse to the document to upload. You may enter an optional Title for the document and click Upload. After you have uploaded each required document you can click on the Submit button in the action panel shown in step 6.

16) When you submit, a panel will appear to select the appropriate review group. Select your location/department to submit to. Click the checkbox to agree to the board policy, [available here](#), and click on Submit. This will send the trip request out for review and approval. Once your trip is approved you will receive an email. If it is declined you will receive an email with a link to review the Notes tab and re-submit.

Submit Trip for Review

Select an approval group below and click the submit button. The trip will be submitted to be approved.

Review Group: Avalon Elementary

I agree that I have reviewed School Board Policy 2340 and Procedure 2340C.

Submit Cancel