

Appendix B

Managing the Approval Paths

T.O.M. has many tools to make it easy for you to quickly setup your approval paths. T.O.M. also helps you spot potential problems with your approval paths so that your trip requests don't get lost.



① T.O.M Tip

Setting Up Approval Paths in T.O.M.

This chapter describes only the more advanced features of maintaining approval paths in T.O.M. If you need help setting up approval paths, the process is described in [Chapter3: Setting Up Approval Paths](#), including examples of typical approval path situations.

Protective Restrictions Concerning Approval Paths

The following protective restrictions are in place in T.O.M. which help you make necessary changes in the right sequence while maintaining your approval paths.

- You cannot delete a Role if it is currently assigned to an Approval Path.
- You cannot delete a Role if it is assigned to at least one User.
- You may not create a Status of 'Pending', 'Accepted' or 'Denied' these statuses are reserved by T.O.M.
- You may not remove a Status of 'Pending', 'Accepted' or 'Denied' these statuses are reserved by T.O.M.
- You may not remove a Status that is being used by at least one Field Trip Request.
- You may not remove a Status that is being used by at least one Approval Path.
- You may not remove an Approval Path that is being used by at least one Field Trip Request.
- You may not remove an Approval Path that is assigned to at least one Customer.
- You may not remove an Approval Path that is assigned to at least one Customer / Trip Category.

If you attempt to complete a change that is prohibited by T.O.M., you will receive an error message similar to the one shown in Figure B-1. Read the error message and then click the OK button to continue. Complete the change suggested in the error message, if there is one.

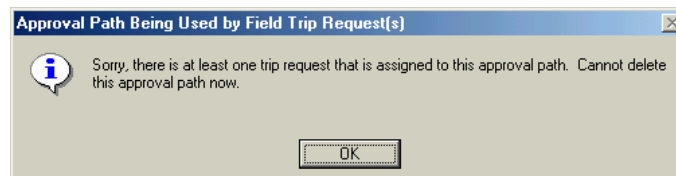


Figure B-1. A typical error message concerning prohibited approval path changes

Creating a New Status for Your Approval Path

A Status is a code word you can create to help T.O.M. monitor where in the approval process the trip request is. As was discussed in [Chapter3: Setting Up Approval Paths](#) an Approval Path is just a collection



of Approvers and the Statuses that are assigned to the trip request after each Approver approves the trip request.

T.O.M. currently comes with five statuses for field trip requests, as shown in Figure B-3, which should work for most customers. However, you may add additional statuses, if necessary. For example, if you have an additional approver in the approver chain, you may need to add an interim approval status, such as “APPROVED2.”

Once the new status is created, you can select it in the Approval Path screen while setting an approval path. See [Chapter3: Setting Up Approval Paths](#) for details.

1. Open the File menu, and choose the WebTrips menu; then choose Statuses (Figure B-2). The Statuses screen is displayed (Figure B-3).

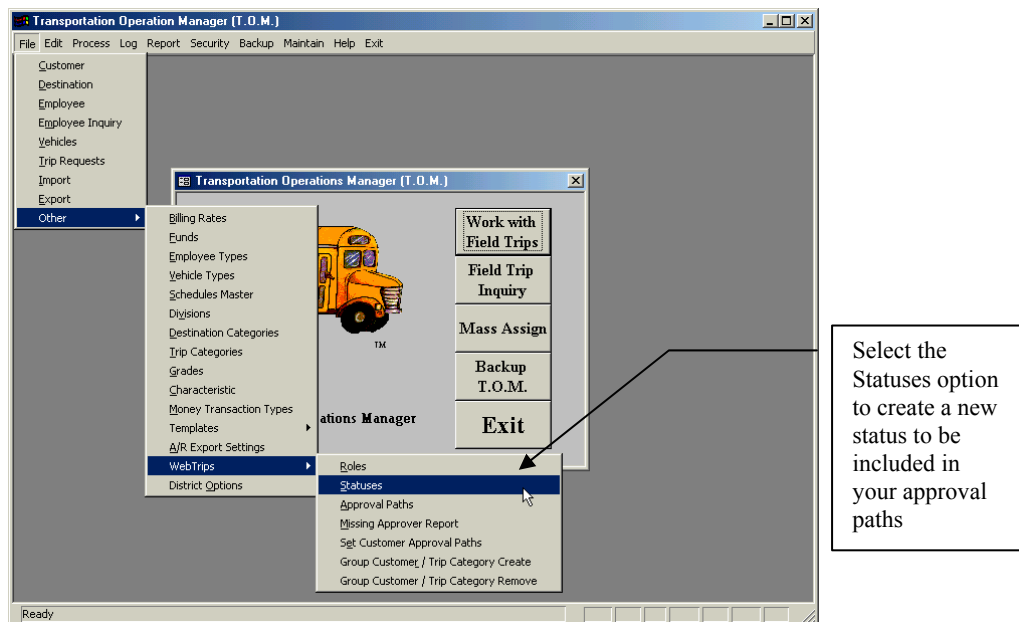


Figure B-2. Opening the Status screen

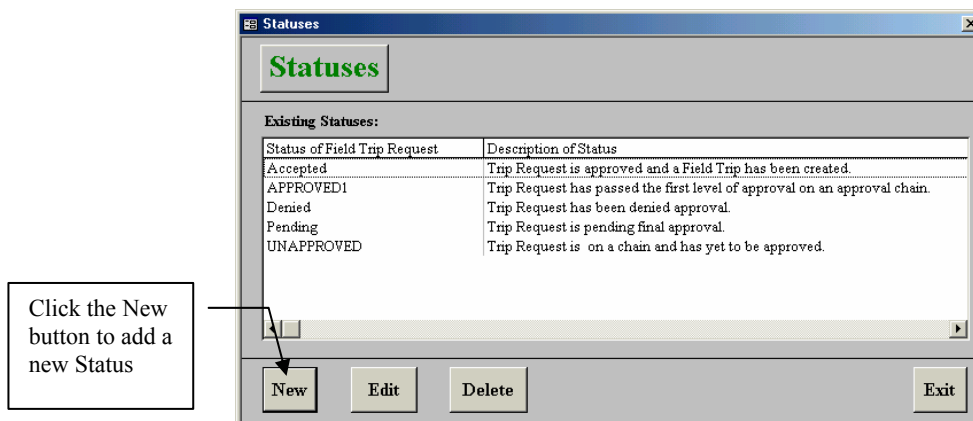


Figure B-3. The Statuses screen shows the current statuses and their descriptions

2. Click the New button. The Status screen is displayed (Figure B-4).



Status

Status: APPROVED2

Description: Trip Request has passed the first and second level of an approval chain.

Status: ☒

OK Exit

Enter the Status name and description here

Figure B-4. Enter the new status name and description

- Enter the name of the new status in the Status field. Enter a description of the status in the Description field. Figure B-4 shows an example of a new status created to accommodate an extra approval necessary in the approval path, which we've named "APPROVED2."
- Click the OK button. The Statuses screen is displayed showing the new Status added (Figure B-5).

Statuses

Existing Statuses:

Status of Field Trip Request	Description of Status
Accepted	Trip Request is approved and a Field Trip has been created.
APPROVED1	Trip Request has passed the first level of approval on an approval chain.
APPROVED2	Trip Request has passed the first and second level of an approval chain.
Denied	Trip Request has been denied approval.
Pending	Trip Request is pending final approval.
UNAPPROVED	Trip Request is on a chain and has yet to be approved.

New Edit Delete Exit

The "APPROVED2" role has been added

Figure B-5. The Statuses screen with the new Status added

- Click the Exit button.
- Use the new status for the appropriate Approval Path using the Approval Path screen, as shown in Figure B-6 and Figure B-7. See [Chapter3: Setting Up Approval Paths](#) for details.



Approval Path

Approval Path ID: Three Approvers

Description: Three Levels of Approval

	Approver Role:	Approver Role Description:	Status of Request AFTER it's Approved at this Level:
Level #1:	Principal		APPROVED1
Level #2:	Athletic		
Level #3:			
Level #4:			
Level #5:			
Level #6:			
Level #7:			
Level #8:			

Accepted
APPROVED1 Trip Request is approved and a Field Trip has been created.
APPROVED2 Trip Request has passed the first level of approval on an ap
Denied Trip Request has passed the first and second level of an ap
Pending Trip Request has been denied approval.
UNAPPROVED Trip Request is pending final approval.
Trip Request is on a chain and has yet to be approved.

Active ☒

OK Exit

Figure B-6. The new Status appears in the Status drop-down list

The new Status is selected in the Approval Path screen

Approval Path

Approval Path ID: Athletic

Description: Principal and Athletic Trip Requests Approval

	Approver Role:	Approver Role Description:	Status of Request AFTER it's Approved at this Level:
Level #1:	Principal	School Level Approver	APPROVED1
Level #2:	Athletic	Approves only athletic trips	APPROVED2
Level #3:	District Approver		Pending
Level #4:			
Level #5:			
Level #6:			
Level #7:			
Level #8:			

Active ☒

OK Exit

Figure B-7. The new status has been added to the approval path



Running the Missing Approver Report



① T.O.M Tip

“What is a ‘Missing Approver’ and why should I worry about it?”

A ‘Missing Approver’ is when an Approval Path has a Role that is NOT assigned to an actual User. If an Approval Path has missing Approvers then all trip requests would be waiting for review from an Approver that didn’t exist.

Think of the Role as an office that you can create. When you assign Users to a Role you are in effect saying “Here are the person(s) that are going to work in this office”. If the Role has no user assigned to it then you have an office that is receiving trip requests but there is no one in the office to review the trip requests and pass them along.

When an Approver is ‘missing’ it will cause trip requests to just sit in that empty Role and be missed. The Missing Approver Report identifies these empty Roles so that you can assign Users to them.

T.O.M. software provides a report you can run to check for “Missing Approvers”, that is any approval paths that are in use and have roles that are not assigned to a user. If your district uses school level approvers, the Missing Approver report will include roles that have not been assigned to a user at the individual school. For example, if your elementary schools require approval by the school Principal and there is no user set up with the role of “principal” assigned to Madison #1 then the report will list “principal” as a missing approver under the customer Madison #1, even if there is a “principal” set up for every other elementary school.

The Missing Approver report is run from the File, WebTrips menu (not from the Reports menu).

1. Open the File menu, and choose the WebTrips menu; then choose Missing Approver Report (Figure B-8).

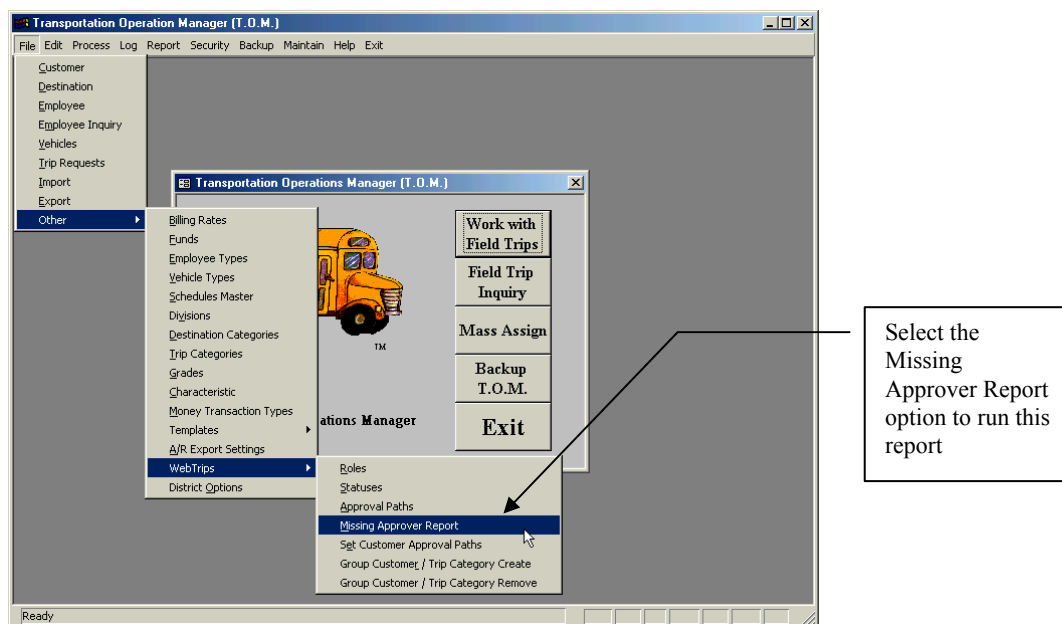


Figure B-8. Running the Missing Approver report



The Missing Approver Report screen is displayed (Figure B-9).

Missing Approver Report

Selected Customer: 0001660 LAKEWOOD EL 2021 49th-C

(Blank for all Customers)

Print Preview Cancel

Use these buttons to print the report or preview it on your screen

Select the Customer Number or leave it blank to run the report for all schools

Figure B-9. The Missing Approver screen lets you print or preview one or all customers

2. Leave the Customer field blank to run a report on all customers or choose a customer from the drop-down list.
3. Do one of the following:
 - To preview the report on screen, click the Preview button. The Preview window is displayed (Figure B-10). Continue to the next step.
 - To print the report on your printer without previewing the report first, click the Print button.
4. You can click on the report with your mouse to zoom in or out and maximize the window, if you wish.

Missing Approver Report

The following is a list of Approval Paths with missing Approvers. This will cause trip requests to be overlooked. To correct this problem every Role on this list needs to be assigned to a User. One way that the problem occurs is that the Users assigned to a R are also assigned to a customer and you have not assigned a user to a role and customer listed on the report.

Customer	Field Trip Category	Role	Approver
0001660 LAKEWOOD EL 2021 49th-C	Athletic	Athletic Trip	Athletic

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Figure B-10. The Missing Approver Report Preview screen

5. If you decide to print the report, close the report Preview window and the Missing Approver Report screen is again displayed (Figure B-9). Click the Print button.
6. Click the Cancel button to exit the Missing Approver Report screen.



Setting Customer Approval Paths

The Set Customer Approval Paths feature allows you to assign one approval path to ALL your customers. This utility sets up the default approvals required for field trip requests from every school. You are still able to specify an approval path that will override this default based on the field trip category (see the section *Assigning an Approval Path to a Customer / Trip Category* later in this Appendix) or to customize the approval requirements at the individual school/customer level (see [Chapter 3: Setting Up Approval Paths](#), the Assigning an Approval Path to a Customer section). This feature can be useful for obvious reasons, with one click of a button trip requests from all of your customers will follow the approval path you select.



ⓘ T.O.M. Tip

WARNING: Before Using This T.O.M. Feature

Make sure you have a current backup of your T.O.M. database BEFORE using this T.O.M. feature. See *Chapter 10: Backing Up and Restoring* in the *T.O.M. User Guide* for details. Also, make sure you are the only person using T.O.M. when you run this feature.

How to Set the Customer Approval Paths

The Set Customer Approval Paths feature assumes the selected approval path exists and that the approvers defined on the path are valid (roles used have been assigned to the appropriate users). For more information on setting up the Approval Path, see [Chapter 3: Setting Up Approval Paths](#).

1. Back up your T.O.M. database, if you haven't already done so. See the T.O.M. Tip above for details.
2. Open the File menu, and choose the WebTrips menu; then choose Set Customer Approval Paths (Figure B-11).

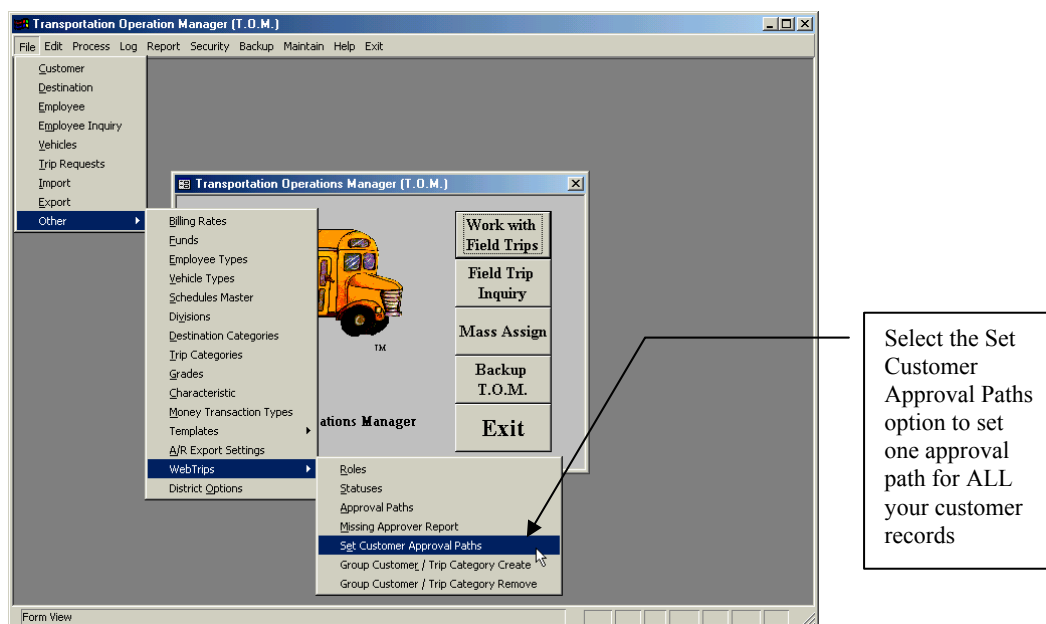


Figure B-11. Running the Set Customer Approval Paths feature

The Set Customer Approval Paths screen is displayed (Figure B-12).

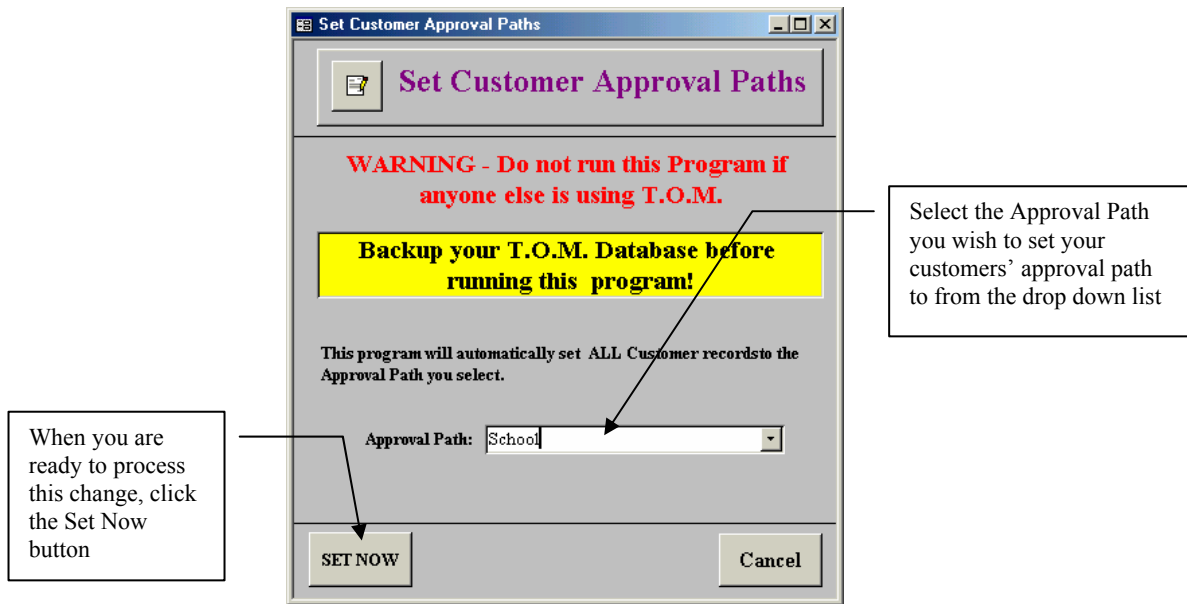


Figure B-12. The Set Customer Approval Paths screen

3. Select the Approval Path you wish to set for ALL your customers.
4. Click the Set Now button. When T.O.M. is finished, it will display a completed message (Figure B-13).

Note: Refer to *Error Messages and Solutions for Approval Path Maintenance* at the end of this chapter if you receive an error message while using this feature.

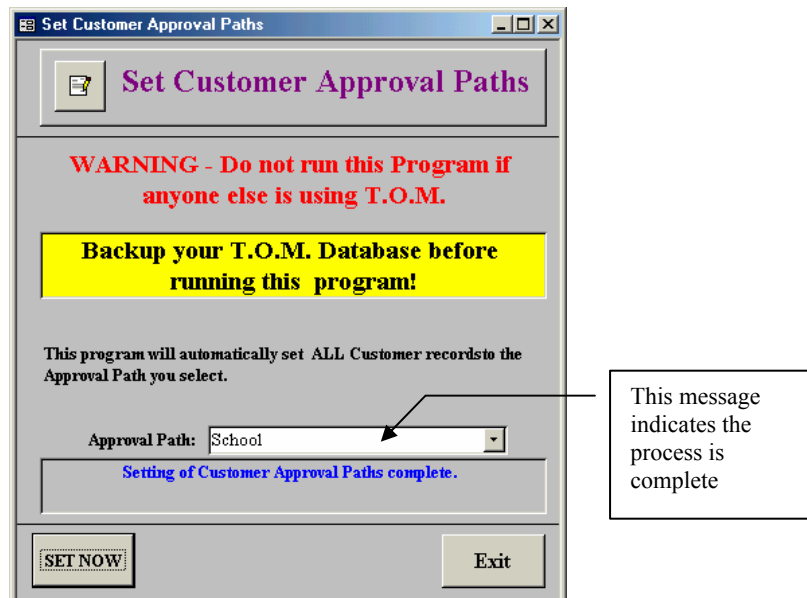


Figure B-13. The T.O.M. message indicates the process is complete

5. Click the Exit button.

**① T.O.M. Tip****“Can I remove all my customers’ approval paths in one step?”**

Yes. The Set Customer Approval Path Routine can remove all of your active customer’s approval paths. To do this simply leave the selected approval path blank when you run the Set Customer Approval Path Routine and click the Set Now button. The Set Customer Approval Path Routine will then remove the approval path in all your active customers.

Assigning an Approval Path to a Customer / Trip Category

The Assign Approval Path feature allows you to automatically create a customer / trip category record for all active customers in your customer file. If your district has different Approval Paths for different types of field trips this handy utility will save you a lot of setup time. For example, if your district has 30 schools and three different Approval Paths for three different types of field trips you would have to create 90 different combinations of customers and Trip Categories. With this utility you would just run three quick processes for each combination of Trip Category and Approval Paths!

**① T.O.M. Tip****WARNING: Before Using This T.O.M. Feature**

Make sure you have a current backup of your T.O.M. database BEFORE using this T.O.M. feature. See *Chapter 10: Backing Up and Restoring* in the *T.O.M. User Guide* for details. Also, make sure you are the only person using T.O.M. when you run this feature.

1. Back up your T.O.M. database, if you haven’t already done so. See the T.O.M. Tip above for details.
2. Open the File menu, and choose the WebTrips menu; then choose Group Customer / Trip Category Create (Figure B-14).

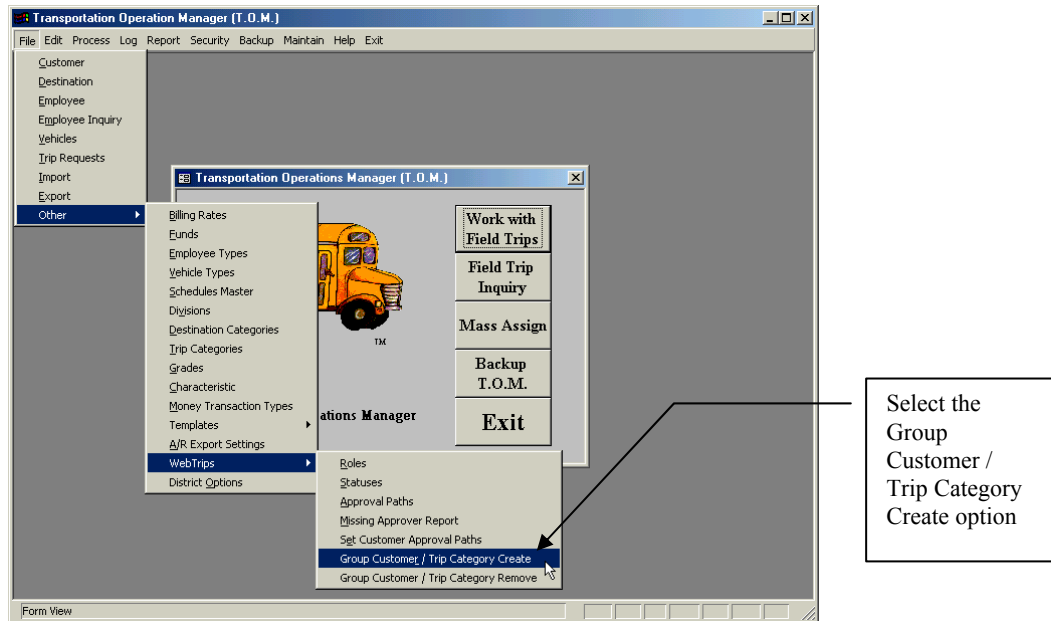


Figure B-14. Selecting the Group Customer / Trip Category Create option

The Group Add Customer / Trip Categories screen is displayed (Figure B-15).

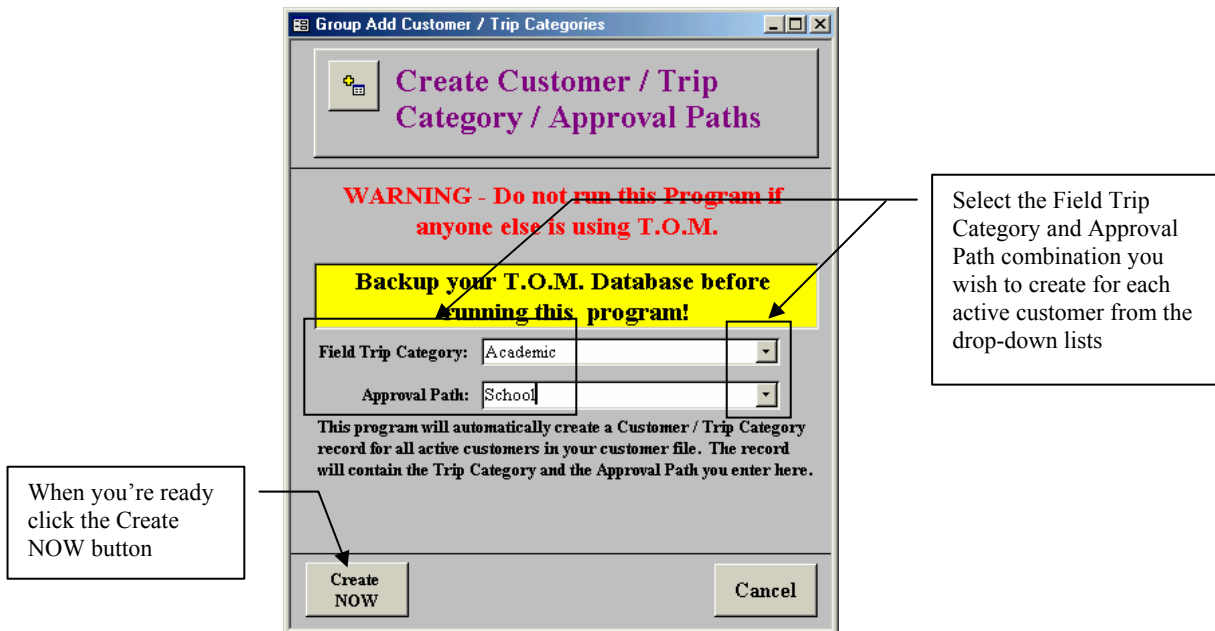


Figure B-15. Note the program and database cautions and warnings on this screen

3. Select the Field Trip Category and Approval Path using the drop-down lists on this screen (Figure B-15).
4. Click the Create Now button. When T.O.M. is finished, it will display a completed message (Figure B-16).

Note: Refer to *Error Messages and Solutions for Approval Path Maintenance* at the end of this chapter if you receive an error message while using this feature.

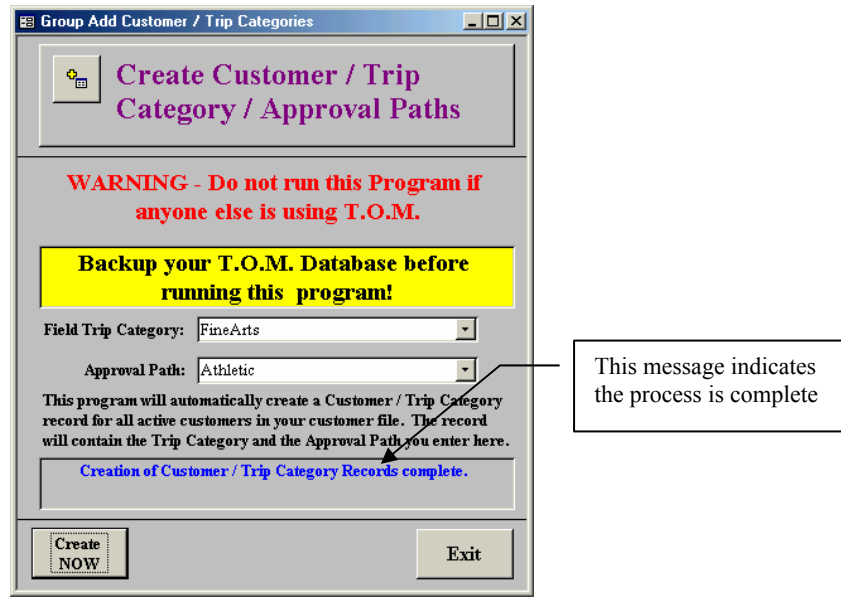



Figure B-16. The T.O.M. message indicates the process is complete

5. Click the Exit button.

Removing an Approval Path from a Customer / Trip Category

The Approval Path Removal feature allows you to automatically remove all customer / trip category records for all active customers in your customer file with the trip category you select in this feature. This is another handy routine for school districts with different Approval Paths for different types of field trips. If you have many schools and you need to remove an old Field Trip Category / Approval Path combination this utility will save you much time!

	<p>WARNING: Before Using This T.O.M. Feature</p> <p>Make sure you have a current backup of your T.O.M. database BEFORE using this T.O.M. feature. See <i>Chapter 10: Backing Up and Restoring</i> in the <i>T.O.M. User Guide</i> for details. Also, make sure you are the only person using T.O.M. when you run this feature.</p>
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1. Back up your T.O.M. database, if you haven't already done so. See the T.O.M. Tip above for details.
2. Open the File menu, and choose the WebTrips menu; then choose Group Customer / Trip Category Remove (Figure B-17).

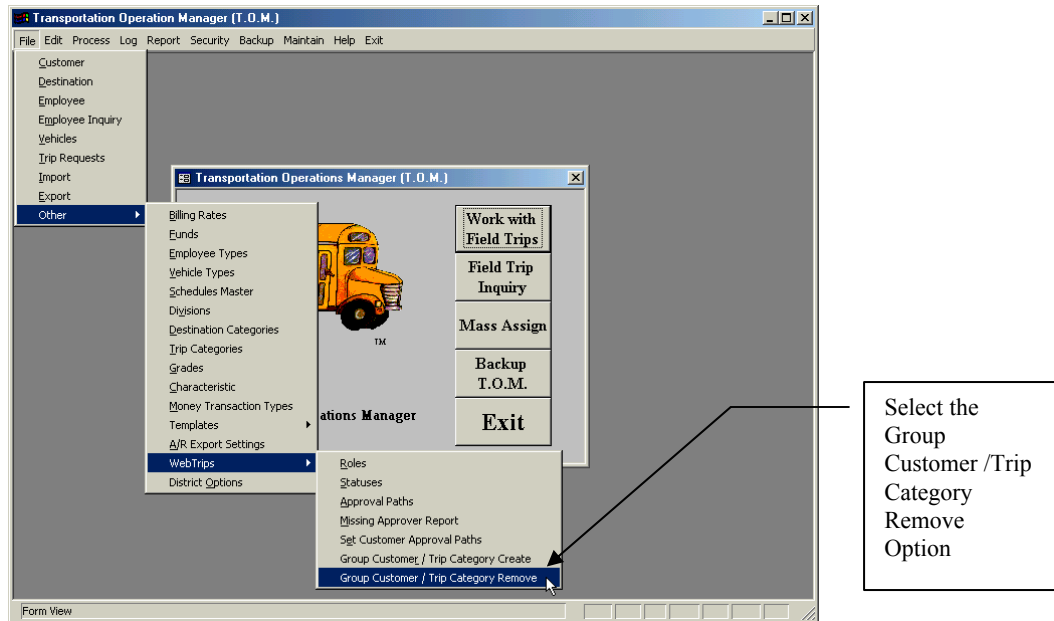


Figure B-17. Running the Group Customer / Trip Category Remove Option.

The Group Remove Customer / Trip Categories screen is displayed (Figure B-18).

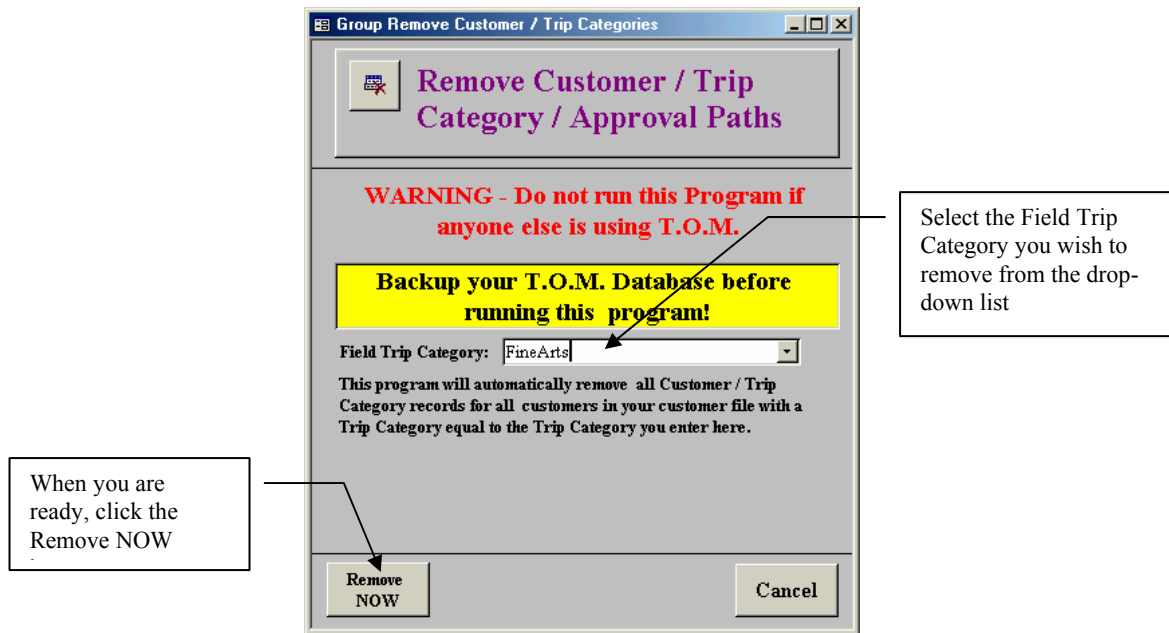


Figure B-18. The Remove Customer / Trip Category Approval Paths Screen. (Note the program and database cautions and warnings on this screen).

3. Select the Approval Path you wish to set for ALL customer records in your database. In the example above we are going to remove all Customer/ Trip Category records that have a Trip Category of 'FineArts'.
4. Click the Remove Now button. When T.O.M. is finished, it will display a completed message (Figure B-19).



Note: Refer to *Error Messages and Solutions for Approval Path Maintenance* at the end of this chapter if you receive an error message while using this feature.

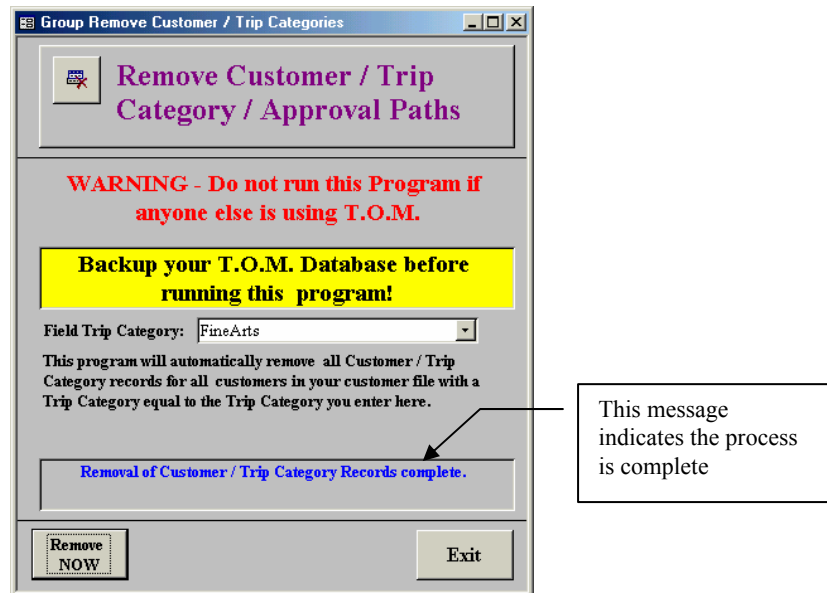


Figure B-19. The T.O.M. message indicates the process is complete

5. Click the Exit button.



Error Messages and Solutions for Approval Path Maintenance

Error Message	Description / Solution
"Oops, you entered a Trip Category Code that does not exist. Try again."	You entered a Trip Category that does not exist. Check the spelling of the Trip Category you are trying to enter and retype it in or select a Trip Category from the drop down list. T.O.M. did not create any Approval Path assignments.
"Oops, you entered an Approval Path that does not exist. Try again."	You entered an Approval Path that does not exist. Check the spelling of the Approval Path you are trying to enter and retype it in or select an Approval Path from the drop down list. T.O.M. did not change or create any Approval Path assignments.
"Oops, there are already Customer / Trip Category records in your T.O.M. database with this Trip Category. Cannot create new records. Please try another Trip Category."	<p>You selected a Trip Category that is already used to define an approval path for to at least one active Customer. T.O.M. cannot create a duplicate record for any Customer / trip category. T.O.M. did not change or create any Approval Path assignments for any Customer / Trip Category combination.</p> <p>To resolve this problem either rerun this routine for a different Trip Category or search through your Customers to find those that already have an approval path assigned to this Trip Category and remove it. Once you think you have removed all references to this specific Trip Category, rerun this process.</p>
"Oops, T.O.M. has detected at least one customer that is assigned to an Approval Path that has a role with no User that can review Trip Requests for this customer. Please Run the Broken Approval Path Report to see which customer(s) have the problem."	<p>After creating your Customers (/ Trip Categories) to the specified Approval Path, T.O.M. then checked these various combinations to make sure that each Customer was assigned to an approval path that had legitimate approvers for that customer. T.O.M. completed the Approval Path assignment, but the setup now needs additional attention by you.</p> <p>When you receive this error it most likely means that at least one of the Roles in the Approval Path is for a school based approver and there is no specific school based approver for at least one of the customers that were assigned to this Approval Path.</p> <p>To resolve this problem see the section earlier in this chapter titled "Running the Missing Approver Report". The Missing Approver Report will list out all Customer / Approval Path combinations that have this and other problem situations that exist.</p> <p>NOTE: If this type of problem is not resolved it will lead to trip requests that are sent to an approver that does not exist and the trip request will remain in a limbo state forever waiting for an approval that will never come and in a sense become 'missing'!</p>