Chapter 6

Approving Trip Requests

Generally speaking, an approver decides if a field trip request should be granted. While approvers are not required, T.O.M. WebTrips accommodates the need for one or more approvers and multiple approval paths, depending on the needs of your school(s) and/or district.

This chapter describes how to:

- Display field trip requests requiring approval

- Approve or Deny field trip requests

- View requests that have been approved or denied

School vs. District Level Approvers

Approvers are either school level or district wide approvers.

- A *School Level Approver* is a person positioned at the school—like a principal—who approves trip requests for just one school / customer.
- A *District Level Approver* is a person positioned outside of the school—perhaps an assistant superintendent or business manager—who approves trip requests for more than one school.

School Level Approver   District Level Approver
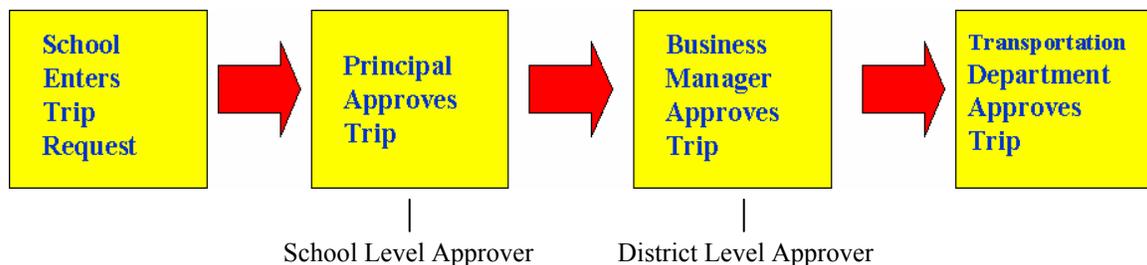
The actual approval process in WebTrips is the same for all approvers.

How Does WebTrips Know What Requests Need Approval?

WebTrips makes it quick and easy for approvers to review *only* the field trip requests they need to see (Figure 6-1). WebTrips designates a user as an "approver" through the role on their *userid*. When the approver logs on to WebTrips and selects "Work With Trip Requests" (from any WebTrips page), WebTrips:

- Sees that this user is designated as an approver;
- Finds out if the approver is district or school level (school approvers will have the school associated to their userid);
- Determines which approval path(s) the user's role is on;
- Searches all active trip requests and automatically displays those assigned to this approver according to the customer (if user is a school level approver) and the approval path;

- Displays only those trip requests that are at a status that needs this user's attention (according to their role and the associated status of that role on the approval path).
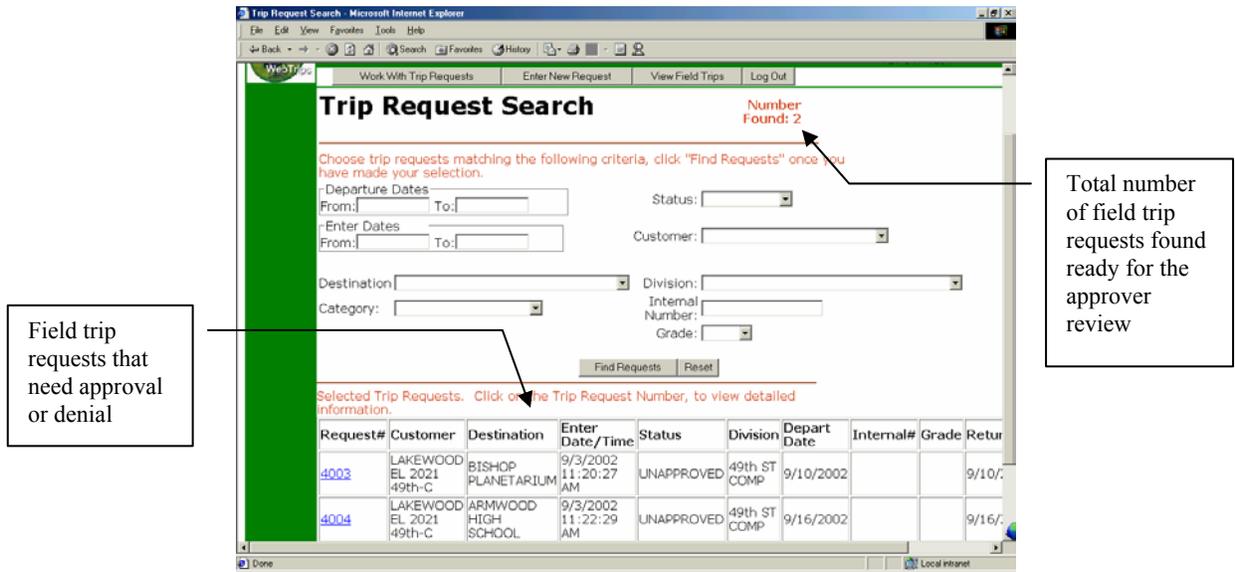

Figure 6-1. WebTrips automatically displays field trip requests that need you're the approver attention

Displaying Field Trip Requests for Approval

As an approver, there are three different ways to bring up the Trip Request Search page displaying field trip requests that need your attention:

- Click the Work With Trip Requests button when you log in (Figure 6-2).
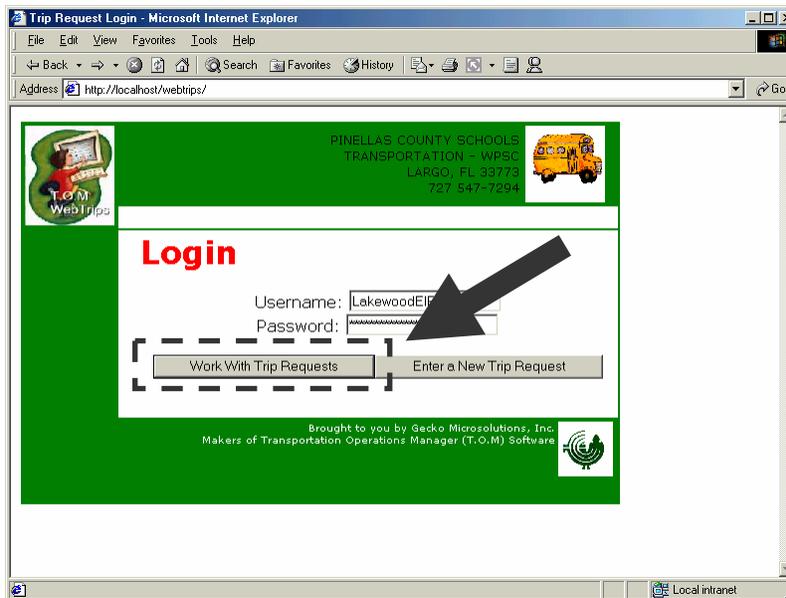
Figure 6-2. Displaying field trip requests for approval when you log in

- Select the "Work With Trip Requests" navigation button from any WebTrips page (Figure 6-3).

Figure 6-3. Displaying field trip requests for approval from any WebTrips page

• Exit the Trip Request Detail page and WebTrips automatically displays the Trip Request Search page (Figure 6-4).

Figure 6-4. Displaying field trip requests for approval after exiting a trip request

As previously stated, when you are an approver WebTrips automatically searches for all of the trip requests awaiting your approval.

- If you are a School Approver, WebTrips only shows trip requests for your school.
- If you are a District Approver, WebTrips shows trip requests for all schools in your district needing your attention.

Approvers can also use the full power of the Trip Request Search page to look up a particular trip request based on any of the search parameters provided. See *Chapter 5: Searching Field Trip Requests and Field Trips* for more information.

Approving or Denying a Trip Request

As an approver, you will need to work through the list of trip requests requiring approval. Follow these steps to approve or deny a trip request:

1. Retrieve the field trip requests to be approved as described in the previous section, "Displaying Field Trip Requests for Approval." The Trip Request Search page is displayed (Figure 6-5).

To review a trip request for approval or denial, click the Request #

Figure 6-5. The Trip Request Search page

2. Click an individual Request # on the Trip Request Search page (Figure 6-5) to display the Request Detail page for that request (Figure 6-6).
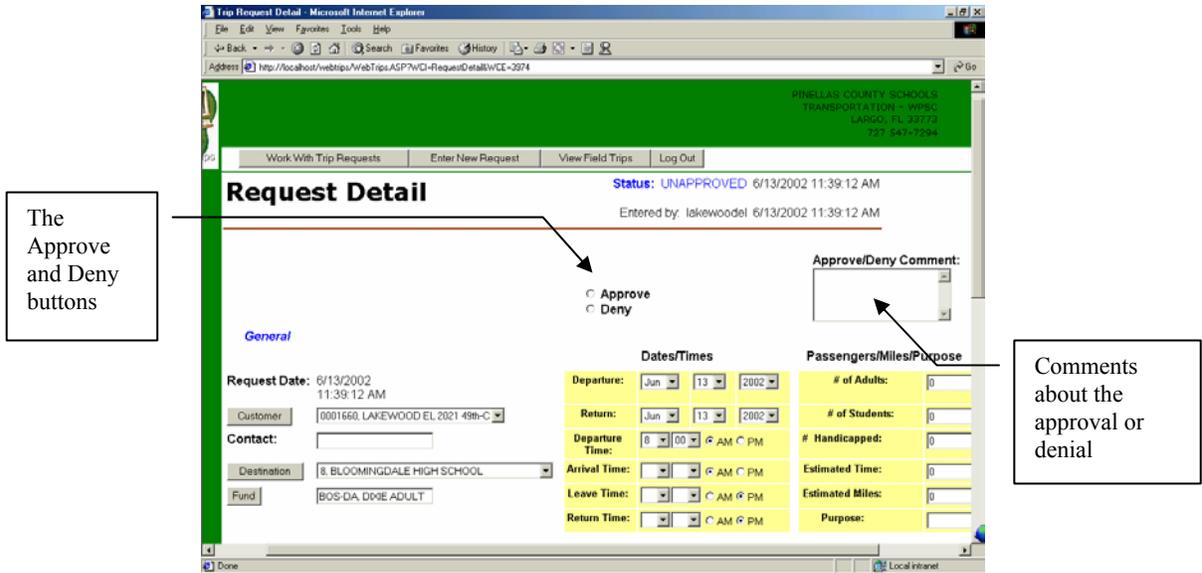
Figure 6-6. An approver sees Approve and Deny buttons and a Comments section

3. WebTrips knows if you are an approver and includes a new section with Approve and Deny buttons and a Comments section for approver comments (Figure 6-6). The approver can also make any changes to the trip request as necessary. Do one of the following to approve or deny the trip request:

To Approve the Trip Request:

Click the Approve button and (if necessary) add optional comments in the Comments section (Figure 6-7). If required, you may change any information on the trip request detail page at this time, then click the Save button at the very bottom of the Request Detail page (Figure 6-8). WebTrips will validate and save the trip request information and refresh the trip request detail page.
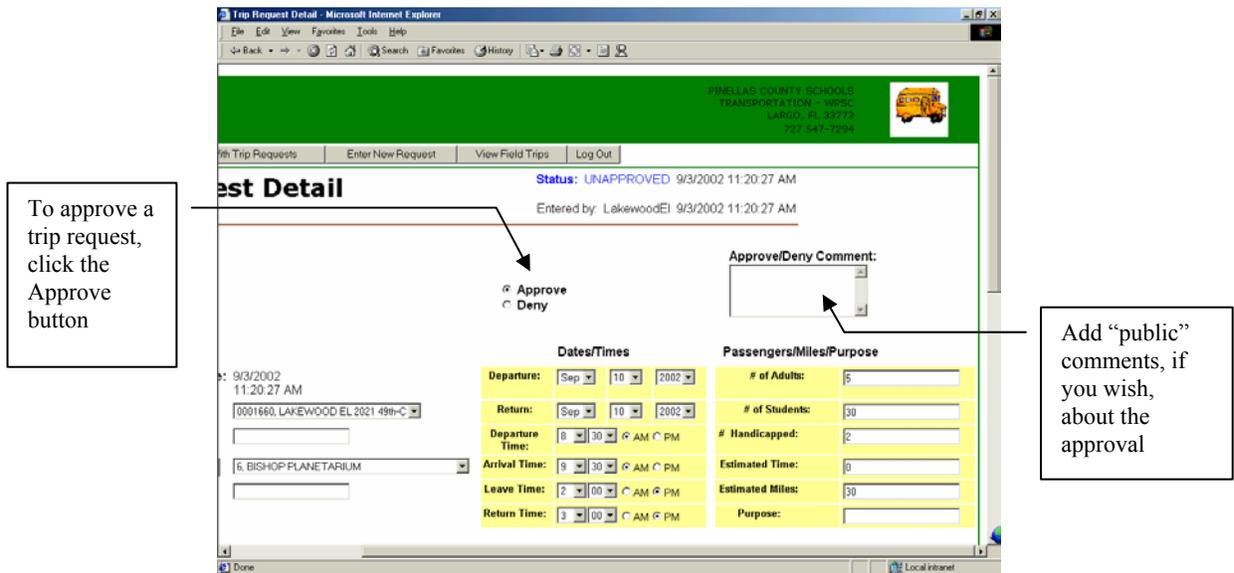

Figure 6-7. Click the Approve button to approve the trip request; add comments, if you wish.
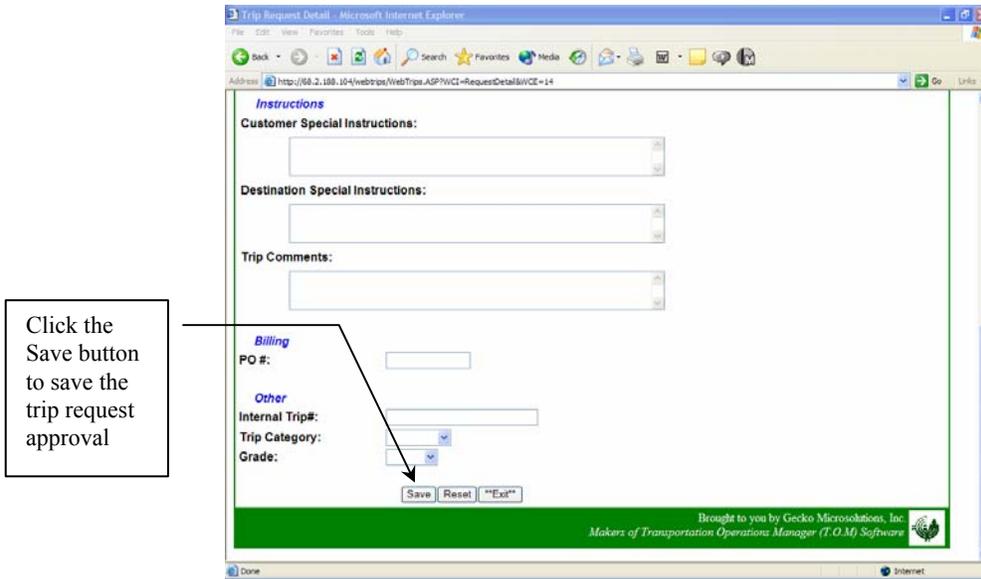
Figure 6-8. Save the trip request approval

Click the Save button to save the trip request approval

When you save the request, WebTrips updates the status of the trip request to the status defined for this approver in the approval path. When the last approver on an approval path approves the trip request the request's status will be changed to "Pending", signifying that the request is turned over to the Transportation Department.

To Deny the Trip Request:

Click the Deny button (Figure 6-9) and (if necessary) add optional comments in the Comments section (Figure 6-7). Then click the Save button at the very bottom of the Request Detail page (Figure 6-10).

To Deny a trip request, click the Deny Button

Add "public" comments, if you wish, about the approval or denial
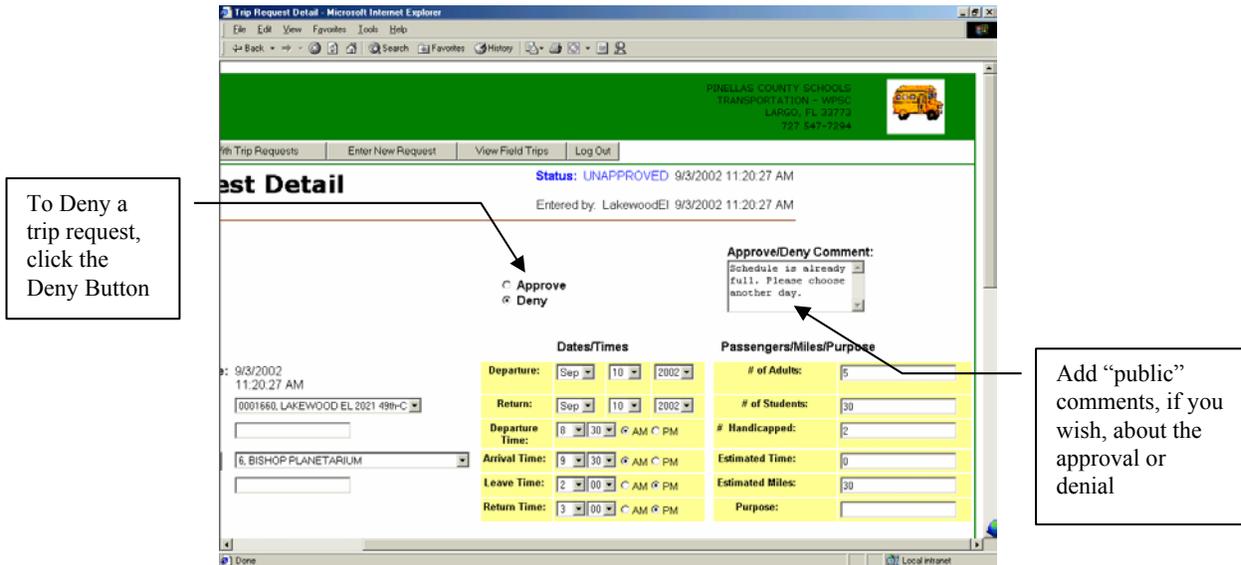
Figure 6-9. Click the Deny button to deny the trip request; add comments, if you wish

Figure 6-10. Save the Denied Trip Request

When you save the request, WebTrips updates the trip request status to "Denied" and prevents any user from changing the trip request detail information. WebTrips will refresh the request detail page, reflecting the new status and date the trip request was denied (Figure 6-11).

Figure 6-11. Saved Trip Request Denial

4. Once you have saved you trip request approval or denial, click Exit at the bottom of the Request Detail page and WebTrips displays the Trip Request Search page with the list of remaining requests requiring approval (Figure 6-12).
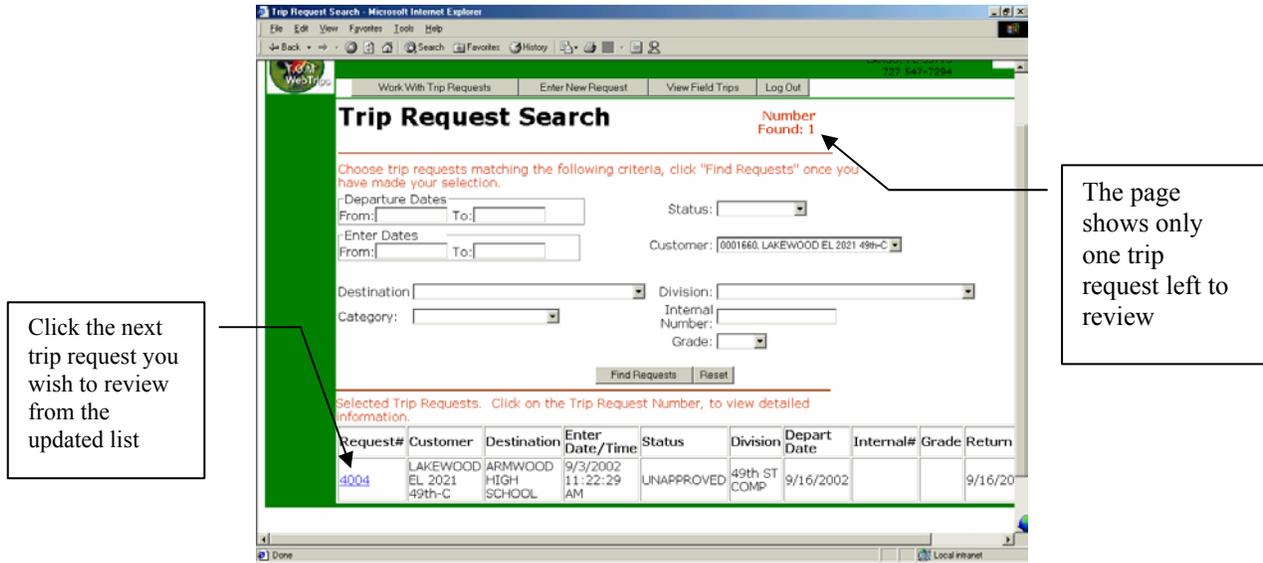
Figure 6-12. The Trip Request Search page updates the list of trip request for review

The page shows only one trip request left to review

Click the next trip request you wish to review from the updated list

How School Users View the Approved or Denied Requests

School users who create the original field trip requests can log in to WebTrips and check the status of requests. They can view all their trip requests no matter what the status by leaving the Status field blank or they can isolate their trip requests by the request's current status. To do this, they select the status in the Status drop-down list and click the Find Requests button. Here are some examples:

- Figure 6-13 shows trip requests that are "Pending" acceptance by the Transportation Department. If a single layer of approval is required for all requests from this school, then the requests' status would be set to "Unapproved" when it is originally entered by the school user. When a request is approved (by the school principal for example), the request's status would migrate to "Pending". "Pending" requests are those approved by the principal but not yet reviewed by Transportation.


The Status field is used to isolate trip requests at different stages of approval
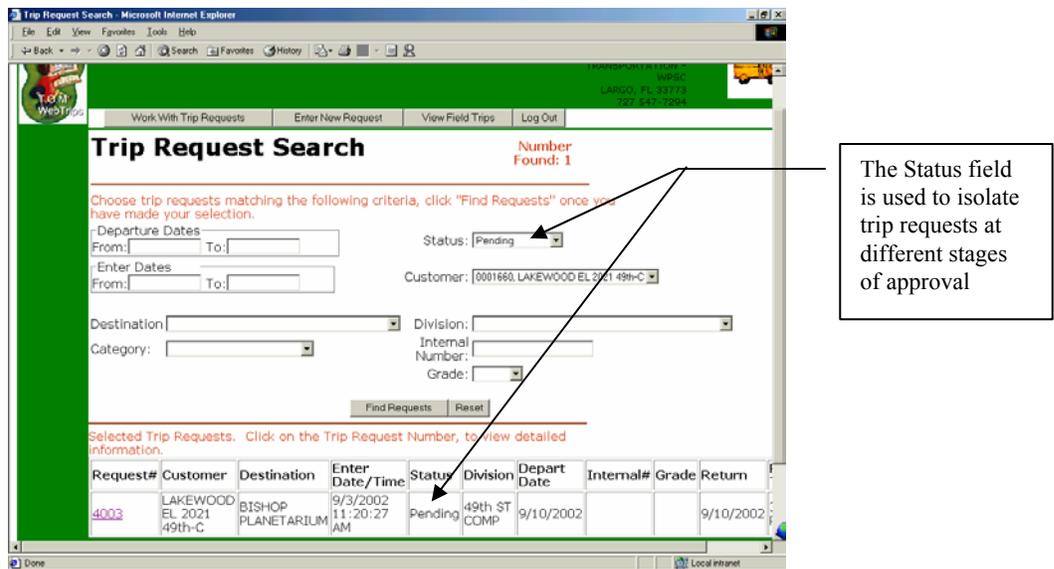
Figure 6-13. Finding "Pending" field trip requests

- Figure 6-14 shows "Accepted" trip requests. These requests have been approved and field trips are being scheduled by the Transportation Department. Note the Trip# in the search results that corresponds to the field trip that has been created for this request.

Figure 6-14. Finding "Accepted" field trip requests (approved requests)

- Figure 6-15 shows "Denied" field trip requests. Trip requests can be denied by anyone in the school and/or district approval path as well as in the Transportation Department.

Figure 6-15. Searching for "Denied" field trip requests

If users have a lot of trip requests to find or if they have more than one school to view, they can further narrow down the list using the other options on the Trip Request Search page. See *Chapter 5: Searching Field Trip Requests and Field Trips* for complete details about how the school user views field trip requests.

To find out more about a specific trip request, the user can click the Request # from the Trip Request Search page (Figure 6-15) and WebTrips will display the Request Detail page (Figure 6-16). If the Transportation Department (or any approver) has entered comments in the Comments field, such as why the trip request was denied, the user can view them on the Request Detail page.

Figure 6-16. Request Detail page for the denied trip request