Chapter 3

Setting Up Approval Paths

This chapter shows how to set up each element required for approval paths and describes how to work with several typical approval scenarios. In this chapter, you'll find the following approval path topics which should help you set up and maintain your own district's trip approval needs:

- Determining If Your District Will Use Approval Paths
- Before You Begin – Understanding the Elements that Make up Approval Paths (Roles, Users, Statuses, Customers)
- Creating an Approval Path with One Approver
- Creating an Approval Path with More Than One Approver.
- Assigning an Approval Path to a Customer
- Using Different Approval Paths for Different Types of Field Trips

ⓘ *T.O.M Tip*	**Associating an Approval Path to a Group of Customers** In addition to assigning an approval path to a single customer as described in this chapter, T.O.M. allows you to mass assign an approval path to all customers, with just a few clicks of the button. See the section Setting Customer Approval Paths in *Appendix B: Managing the Approval Paths* for more information. **Maintaining Approval Paths in T.O.M.** Once you set up your approval paths as described in this chapter, you may need to make changes to approvers, customers or paths, add or delete approval items, and so on. T.O.M. includes a variety of useful maintenance features that help you make adjustments safely. T.O.M. walks you through the process in the right order and provides reports geared to catch mistakes. See *Appendix B: Managing the Approval Paths* for details about all approval path maintenance features.

Determining If Your District Will Use Approval Paths

If your schools enter trip requests and the requests are immediately sent to the Transportation Department for review (approval or denial), you do not have to set up approvers and approval paths. You can skip this chapter entirely.

School Enters Trip Request	→ **Transportation Department Accepts Trip**

Without approval paths, school users enter trip requests directly into WebTrips and they are considered "Pending" requests. The transportation department can either accept or deny "Pending" requests, for more information see *Chapter 4: Entering a Field Trip Request*, and *Chapter 7: Trip Requests at the Transportation Department*.

Before You Begin – Understanding the Elements that Make up Approval Paths (Roles, Users, Statuses, Customers)

In general, an approval path is any sequenced list of field trip approvers. The trip request's progression through the approval path is controlled by the status. The approvers in the list are T.O.M. Users that have been assigned an approval role.

Figure 3-1. Creating approval paths with the Approval Path screen

The steps in creating an Approval Path are to:

- Create an approval role for the person who will be the approver.
- Assign the approval role to a new or existing user.
- Create the approval path.
- Associate the approval path to the school(s). Every time a trip request is created for this school (also called customer in T.O.M.) it will need to pass through each approver on the approval path before being considered by transportation.
- Finally, if approval paths vary by the type of trip, you will need to associate an approval path with the customer / trip category.

There are several screens within the T.O.M., Transportation Operations Manager, Field Trip software used to set up field trip request approval paths. Creating roles, creating approval paths and mass assigning approval paths tasks are handled in the File, WebTrips menu (Figure 3-2). Assigning approval roles to users is done in the Security, Users menu. Associating approval paths with individual customers is handled under the File, Customer menu.

	Associating an Approval Path to a Group of Customers
ⓘ *T.O.M Tip*	T.O.M. allows you to assign an approval path to all your customers or one assigned for a selected trip category for all customers. These two utilities allow you to quickly assign the correct approval paths to most if not all of your customers and / or customer trip categories. See *Appendix B: Managing the Approval Paths* for details.

Assign approval paths to individual Customers

Access User screens using the Security menu

The WebTrips menu provides access to approval path setup and maintenance
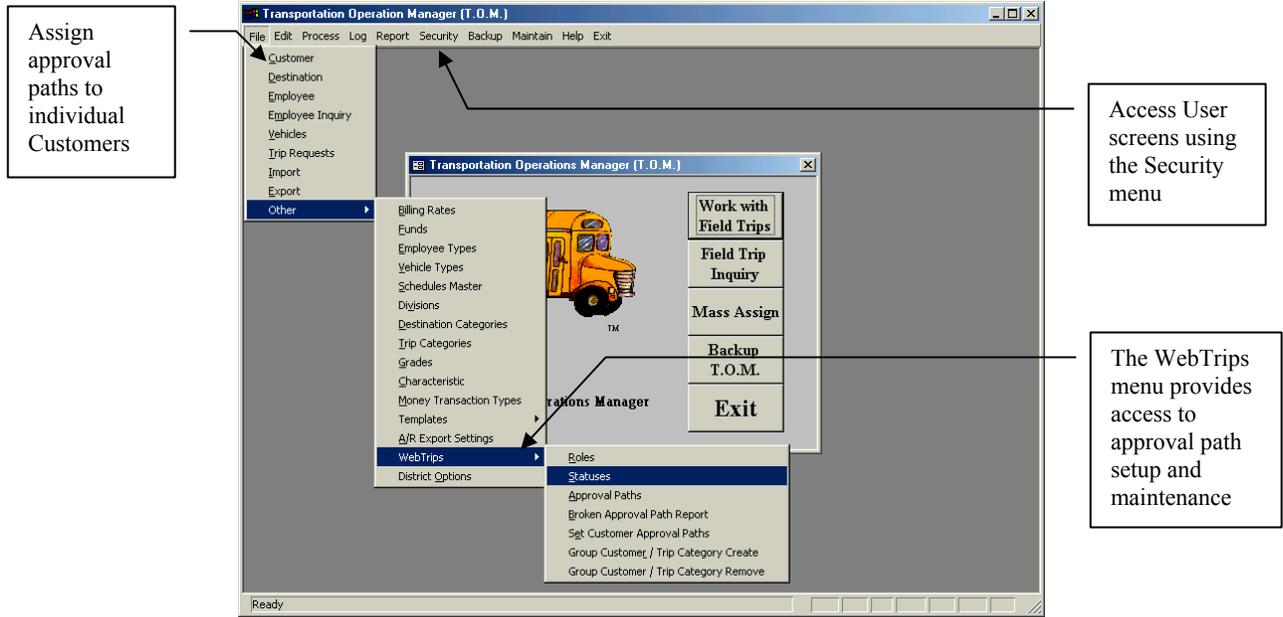
Figure 3-2. Accessing the T.O.M. WebTrips and Users menus

Remember, these tasks are performed in T.O.M. You must be logged on to T.O.M. as an authorized user with the proper permissions before these tasks can be completed. Check with your T.O.M. administrator if you have any questions. Now, let's look at the first step: *Create the Approval Role.*

Create the Approval Role

1. Open the File menu, and choose the WebTrips menu; then choose Roles (Figure 3-3).

Select the Roles option to work with approval roles
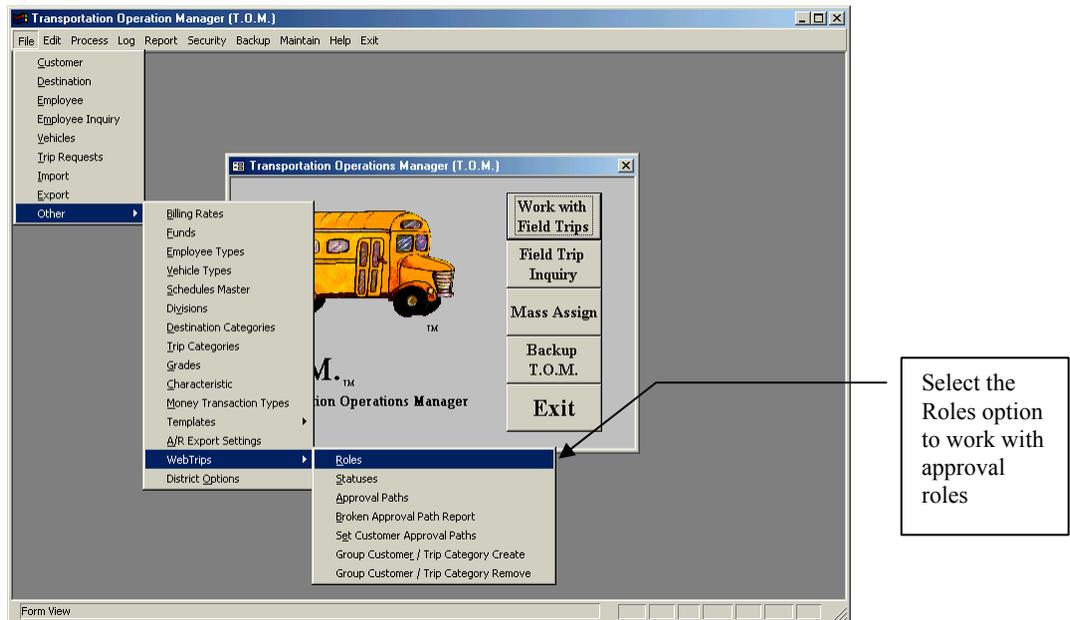
Figure 3-3. Creating a new approver role using the Roles option

The Roles screen is displayed (Figure 3-4).
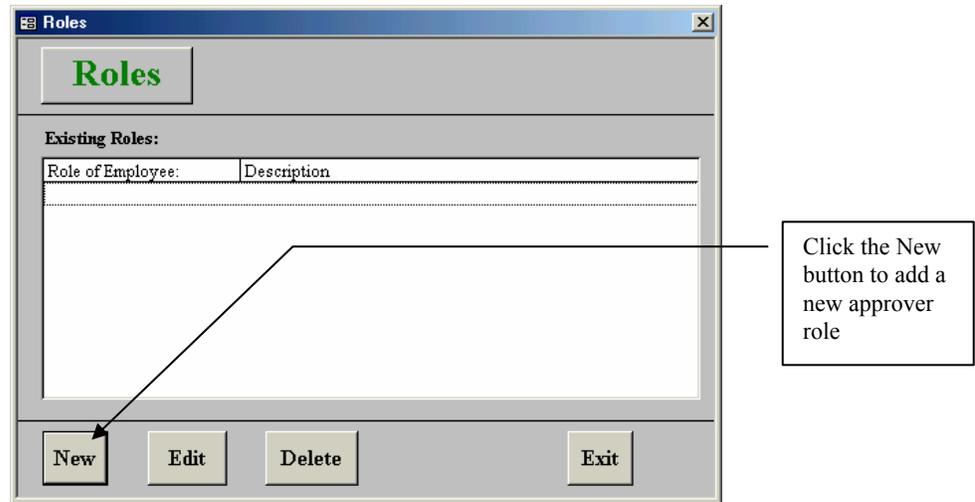
Figure 3-4. The Roles screen displays all existing approval roles

2. Click the New button. The New Role screen is displayed (Figure 3-5).
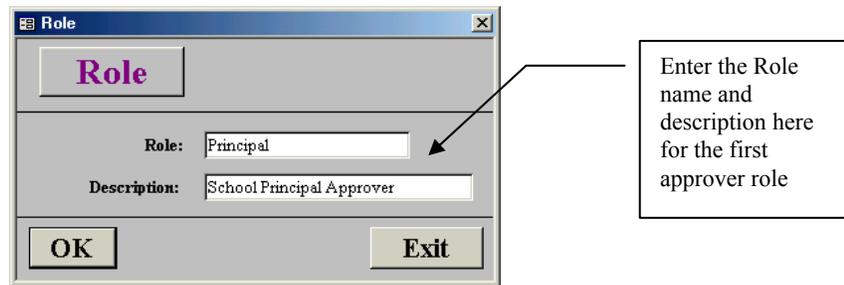

Figure 3-5. The first approver role name

3. Enter the new role. Provide a short name and a description. In this case we are creating a role named Principal. Click the OK button. The Roles screen shows the new role (Figure 3-6).
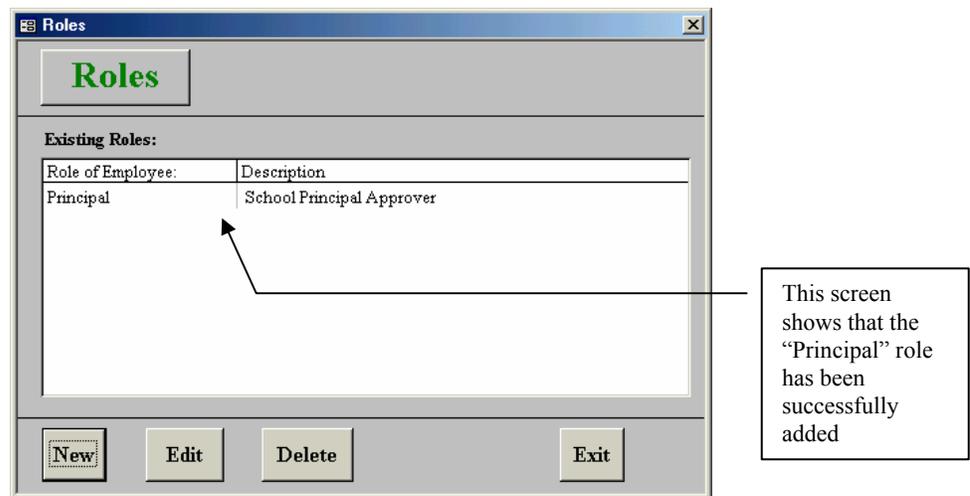

Figure 3-6. The new approval role added

4. If another role is required, repeat steps 2 and 3 until all of the roles for each of your approval chains have been entered.

5. Click the Exit button. Continue to Assign the Role to a New or Existing User.

Assign the Role to a New or Existing User

1. Open the Security menu and choose Users (Figure 3-8).
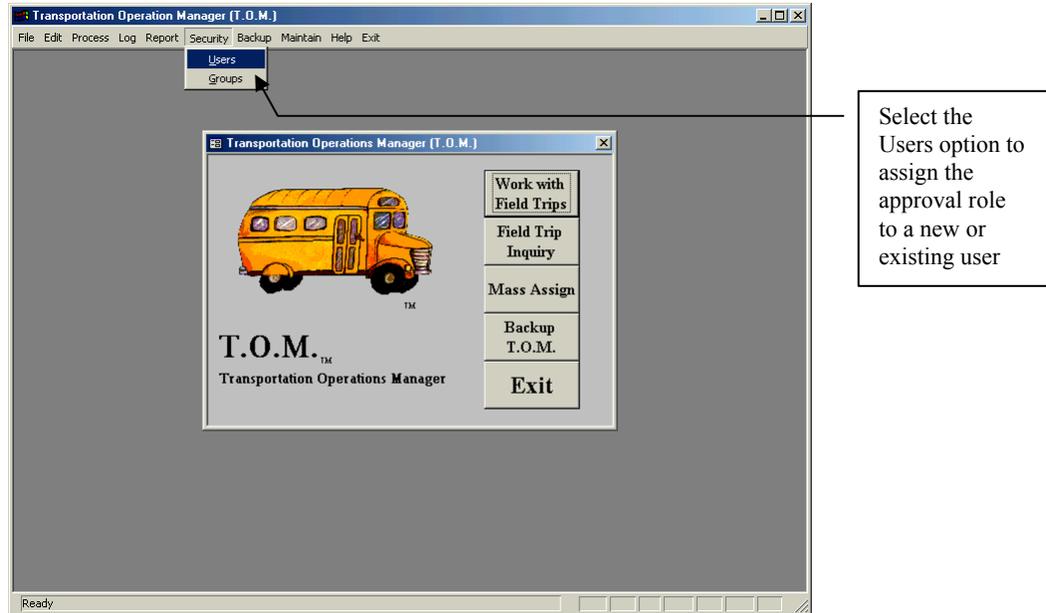
Figure 3-7. Accessing the Users menu to assign the approval role

The Users screen is displayed (Figure 3-8).
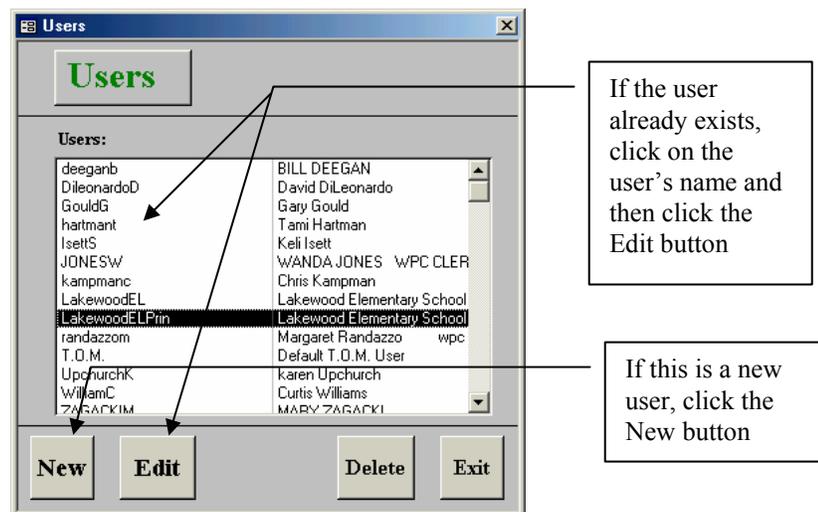
Figure 3-8. The Users screen is used to assign the role to a new or existing user

2. If the user who will have this role already exists, click on the existing user name and then click the Edit button. Otherwise, click the New button to create a new user for the role. See Figure 3-8. The Users detail screen is displayed (Figure 3-9).
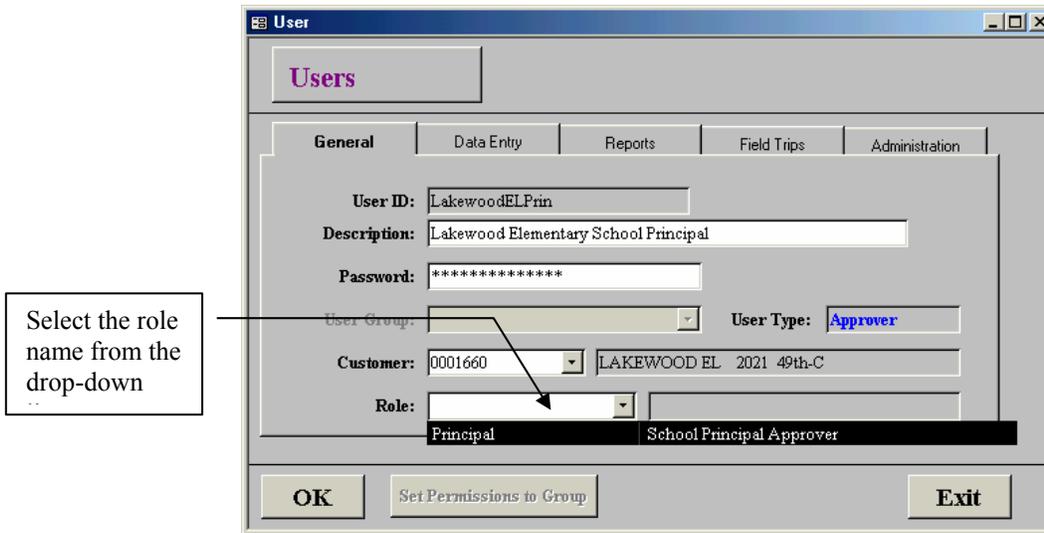
Figure 3-9. The User detail screen (will be blank if it is a new user)

Select the role name from the drop-down

3. If the user already exists, all you need to do is assign the Role field. If this is a new user, you will also need to fill out the user details (Description, Password, and Customer) as described in *Chapter 9: Security* of the *T.O.M. Getting Started Manual*. To select the role for this user, click the Role drop-down and choose Principal (for example).

Note: If the user will only access T.O.M. WebTrips and not use the client version of the T.O.M. Field Trip Software, then it is not necessary to define user permissions (found in the *Data Entry, Reports, Field Trips, Administration* tabs), these are only applicable in the T.O.M. client version.

4.   For both new and existing users, note the Customer field. Customer should be specified if this approver only approves trip requests for a single customer (or school), if the user approves trip requests from multiple customers, (i.e. an athletic director) the customer field should be blank.

5. Click the OK button. The Users search screen is again displayed (Figure 3-8).

6. Click the Exit button. Continue to *Establish the Approval Path* in either the *Creating an Approval Path with One Approver* or the *Creating an Approval Path with More Than One Approver* sections below.

Creating an Approval Path with One Approver

In this typical situation, the school enters the field trip request and only one person, such as the School Principal, reviews it before it goes to the Transportation Department.
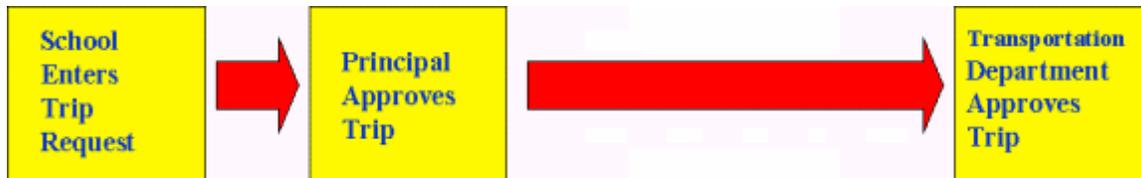
To set up this type of approval path:

- First, create a new approval role for the person who will be the approver. It can be a generic name, such as Principal. See *Create the Approval Role* for details.

- Second, assign the role you created to a new or existing user. See *Assign the Role to a New or Existing User* for details.

- Third, establish the approval path. See *Establish the Approval Path* below.

- Finally, associate the approval path with a T.O.M. customer, so that the approval will be required each time a field trip request is created for that customer. See the *Associating the Approval Path with a Customer* section below.

Establish the Approval Path

1. Open the File menu, and choose the WebTrips menu; then choose Approval Paths (Figure 3-10).
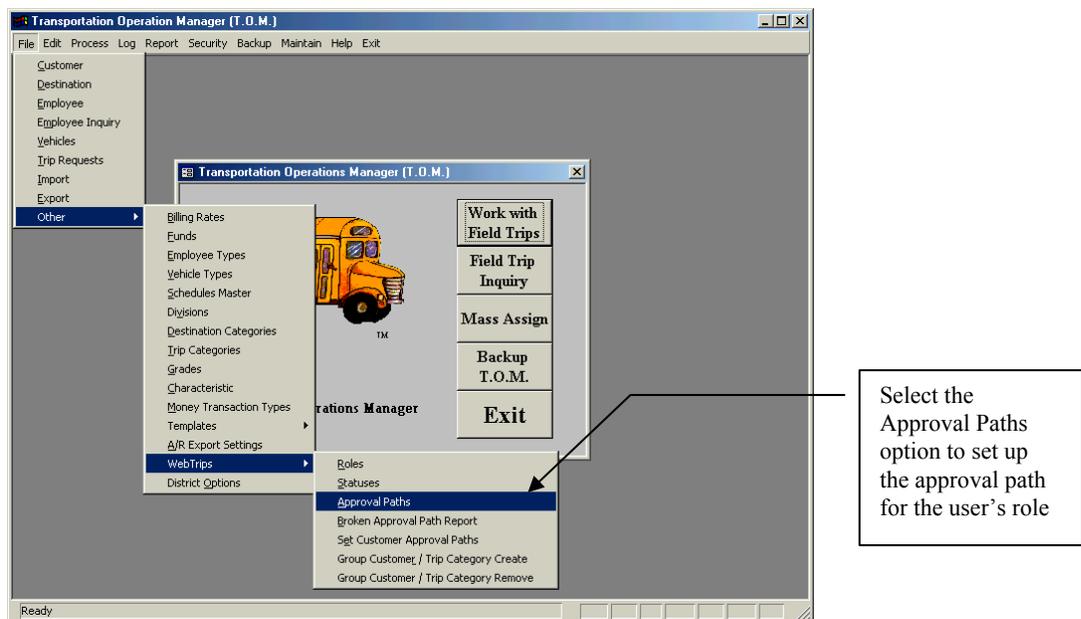

Figure 3-10. Accessing the Approval Paths option

The Approval Paths screen is displayed (Figure 3-11).
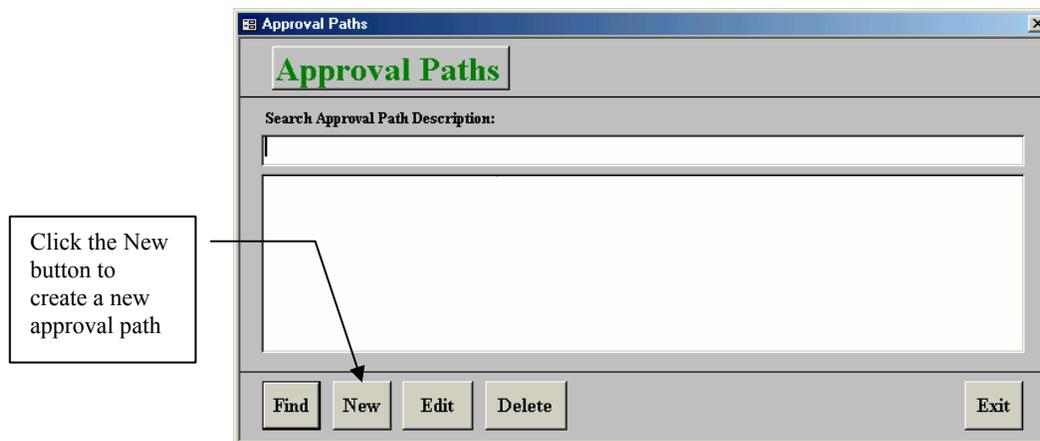
Figure 3-11. The Approval Paths screen displays all existing approval paths

2. Click the New button to create the new approval path. The Approval Paths detail screen is displayed (Figure 3-12).

3. Enter a name and description for the approval path in the Approval Path ID and Description fields, such as the one shown in Figure 3-12.
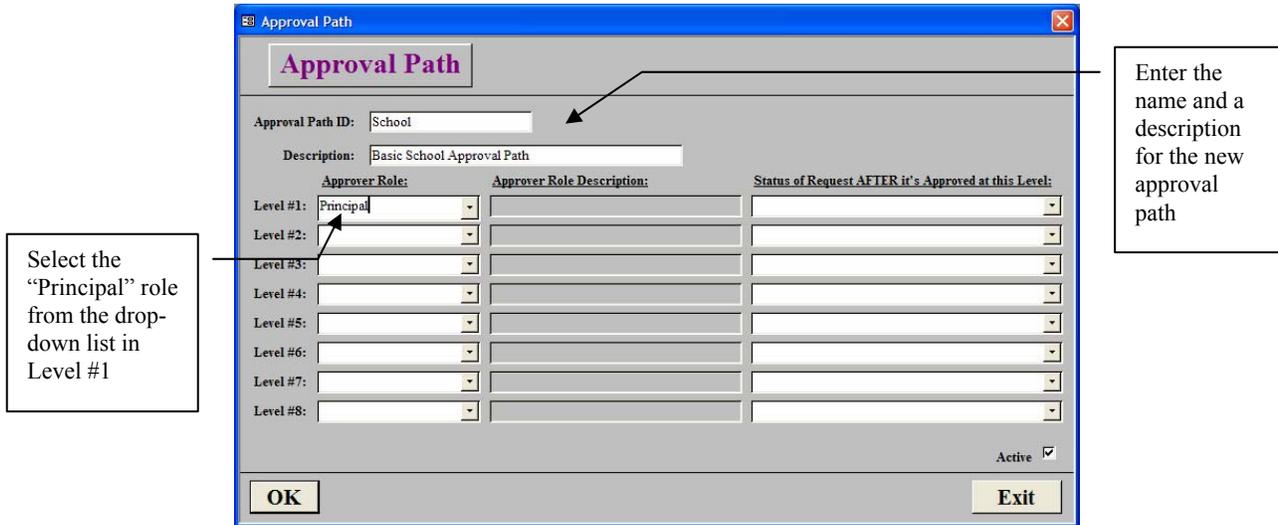
Figure 3-12. With only one approver, only Level #1 is needed to establish the approval path

4. In the Level #1 approval path, click the Approver Role drop-down and choose "Principal."

5. Also in the Level #1 approval path click the "Status of Request AFTER it's Approval at this Level" drop-down and select "Pending" (Figure 3-13). What this means is that when the Principal approves the field trip request, its status is marked as "Pending" and is sent directly to the Transportation Department. (NOTE: You can create and maintain your own unique statuses using T.O.M. For more information on how to create statuses see *Appendix B: Managing the Approval Paths*)
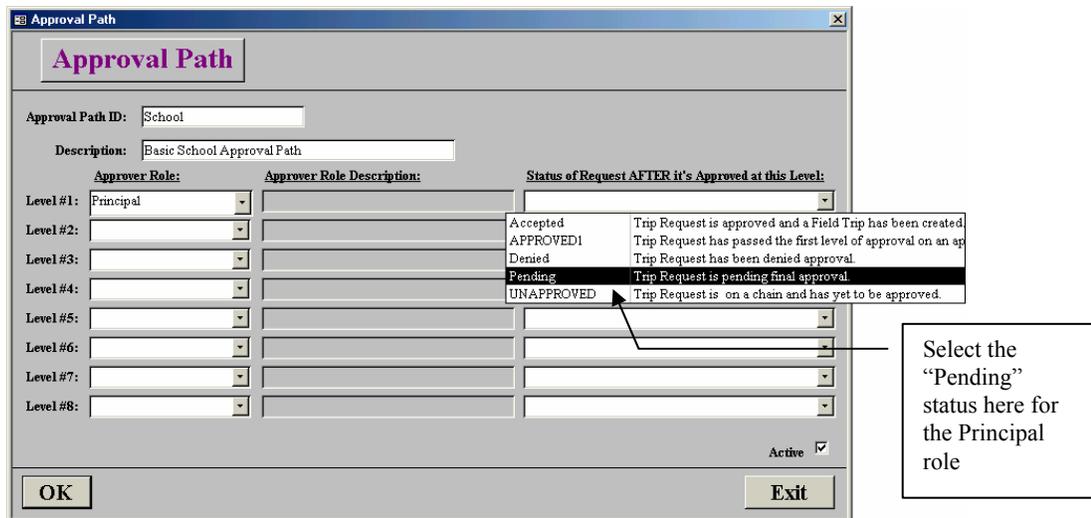
Figure 3-13. Assign the Principle role and the trip request's status after approval

6. Click the OK button. The Approval Paths screen shows the new approval path (Figure 3-14).
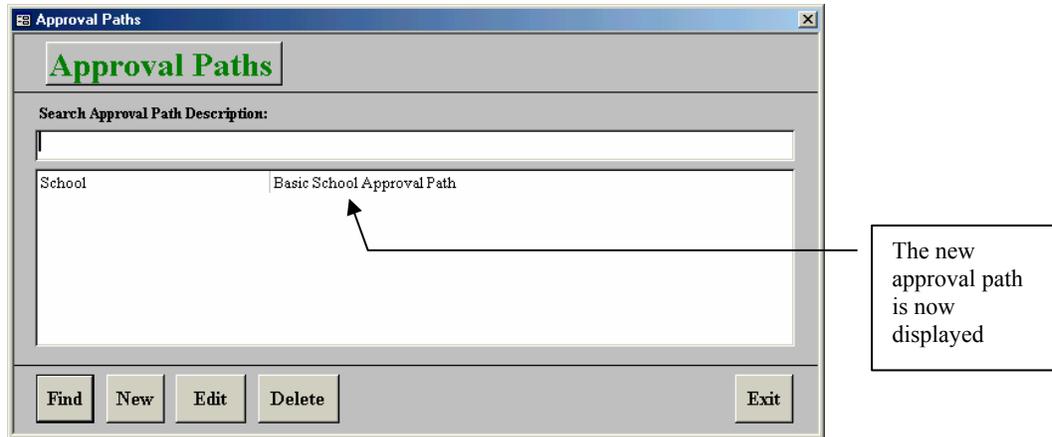
Figure 3-14. The new approval path

7. Click the Exit button. Congratulations! You have set up your approval path.

Creating an Approval Path with More Than One Approver

In this situation, the school enters the field trip request and more than one person, such as a School Principal and a District Administrator reviews it before it goes to the Transportation Department.
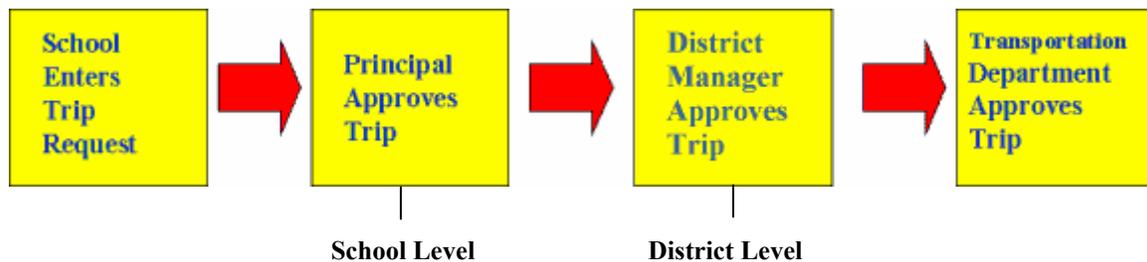
To set up this type of approval path:

- First, create two new approval roles for the people who will be the approvers. They can be generic names, such as Principal and District Administrator. See Create the Approval Role for details.

- Second, assign the roles you created to new or existing users. See Assign the Role to a New or Existing User for details.

- Third, establish the approval path. See *Establish the Approval Path* below for details.

- Finally, associate the approval path with a T.O.M. customer, so that the approval will be required each time a field trip request is created for that customer.   See the Assigning an Approval Path to a Customer section.

Establish the Approval Path

1. Open the File menu, and choose the WebTrips menu; then choose Approval Paths (Figure 3-15).
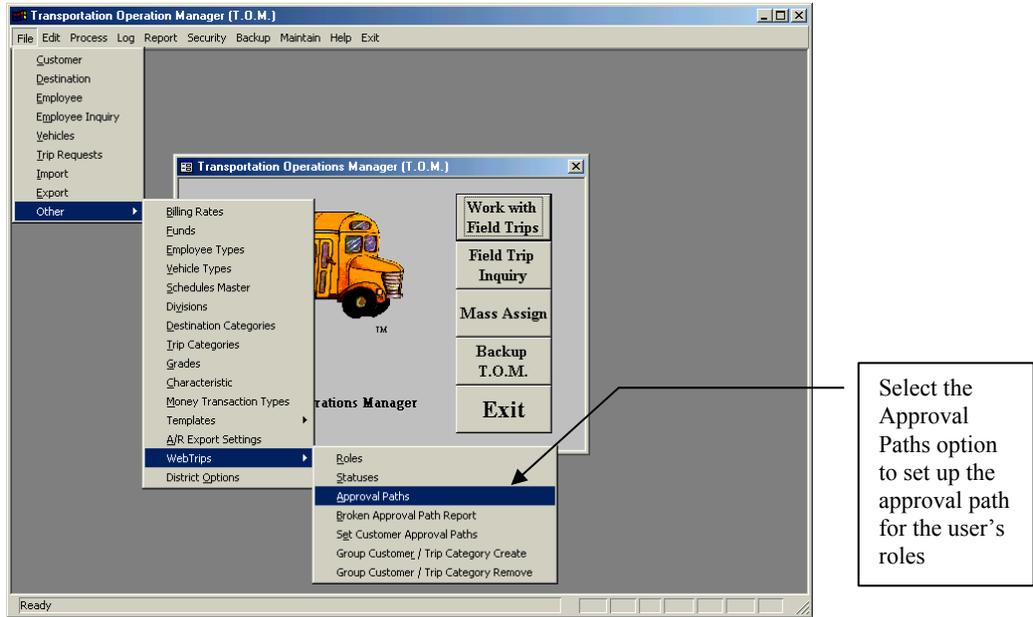
Figure 3-15. Establishing the approval path

The Approval Paths screen is displayed (Figure 3-16).
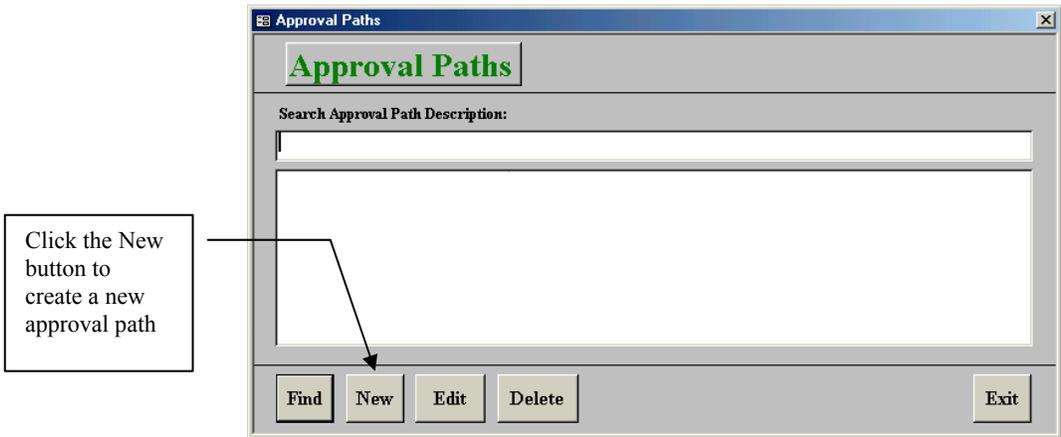
Figure 3-16. The Approval Paths screen allows you to create a new approval path

2. Click the New button to create the new approval path. The Approval Paths detail screen is displayed (Figure 3-17).

3. Enter a name and description for the approval path in the Approval Path ID and Description fields, such as the one shown in Figure 3-17.

Figure 3-17. This screen allows you to set up the details of the approval path

4. In the Level #1 approval path, click the Approver Role drop-down and choose "Principal."

5. Also in the Level #1 approval path click the "Status of Request AFTER it's Approval at this Level" drop-down and select "APPROVED1" (Figure 3-17).

6. Now go to Level #2 and select the District Administrator under Approval Role and "Pending" for Status (Figure 3-18). What this means is that when both the Principal and District Administrator have approved the field trip request, its status is marked as "Pending" and is sent directly to the Transportation Department.

Figure 3-18. This screen shows the completed approval paths

7. Click the OK button. The Approval Paths screen shows the new approval path (Figure 3-19).
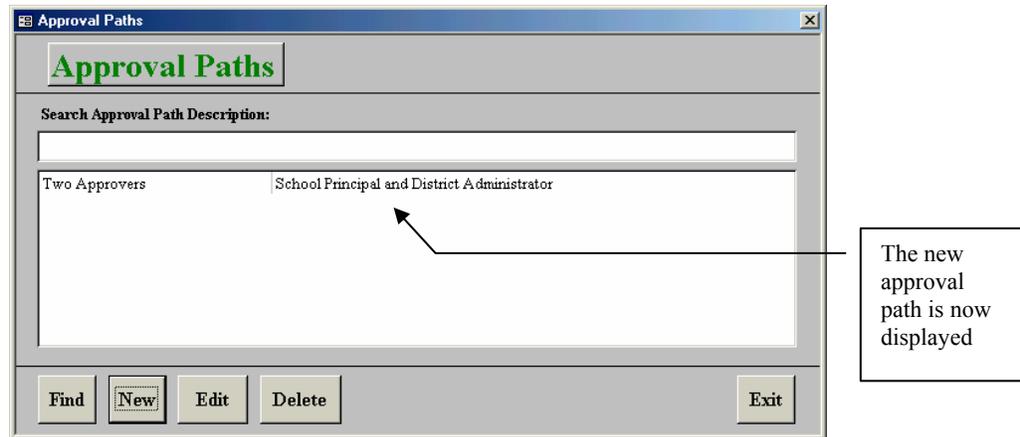
Figure 3-19. The new approval path for the school and district approvers

8. Click the Exit button. Congratulations! You have set up your approval path.

NOTE: T.O.M. requires that the status of the last approval level be set to 'Pending'.   The status of 'Pending' tells T.O.M. to send the trip request to the Transportation Department. Also T.O.M. does not allow more than one approval level to have the same status.

Assigning an Approval Path to a Customer

In WebTrips, field trip requests are entered for a T.O.M. customer (or school) and will require approval if an approval path is specified for that customer (or customer trip-category as described below). T.O.M. WebTrips is flexible enough to allow you to specify that Central High School field trips require approval by the school's principal but that no approval is required for Sun Valley Elementary. Or that the district's athletic trips should be approved by the athletic department and all other trips should be approved by the requesting school's office manager. Let's see how to set this up!

Assigning the Approval Path

1. Open the File menu, and choose the Customer option; the Customer Search screen is displayed (Figure 3-20).

2. Select a customer and click Edit.
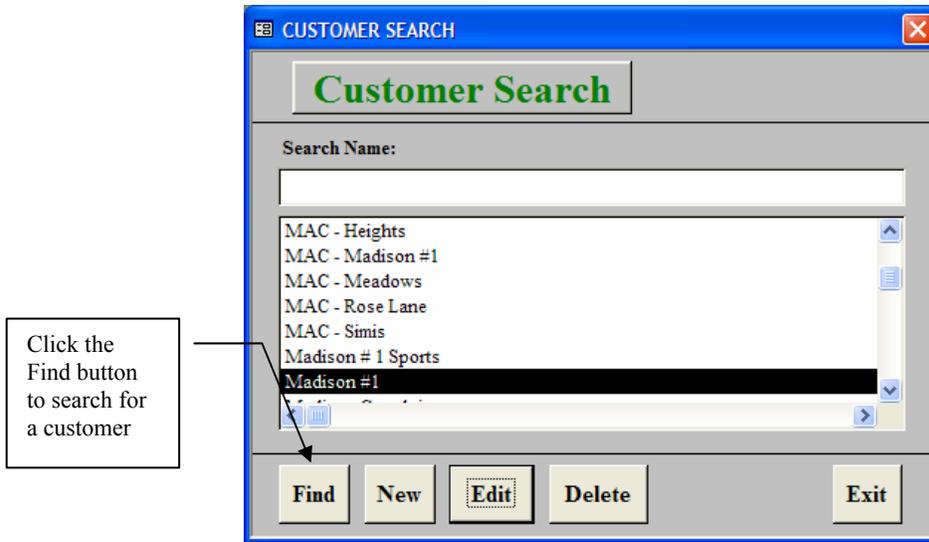
Figure 3-20. Find the customer with the Customer Search screen

Click the Find button to search for a customer

3. The Customer Maintenance screen is displayed (Figure 3-21). Click the Other Tab.

First, select the appropriate Approval Path from the drop-down list

Second, click the OK button
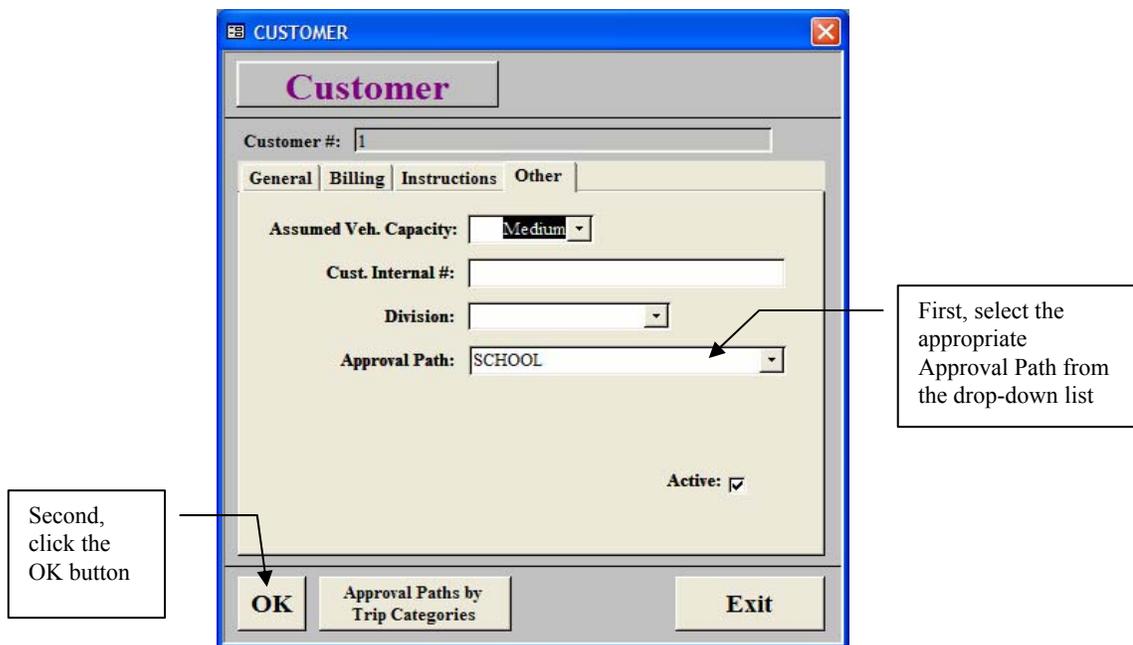
Figure 3-21. The Customer Maintenance screen has four tabs; select the Other tab

4. Click the Approval Path drop-down list and select the appropriate Approval Path. Click OK to save and exit the Customer screen.

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① *T.O.M Tip*

Associating an Approval Path to a Group of Customers

In addition to assigning an approval path to a single customer, T.O.M. allows you to easily mass assign an approval path to all customers, with just a few clicks of the button. See the section Setting Customer Approval Paths in *Appendix B: Managing the Approval Paths* for more information.

Using Different Approval Paths for Different Types of Field Trips

Armed with your knowledge from the previous sections, you will be able to set up even more sophisticated approval paths. The one example shown below requires multiple approval paths with different personnel as approvers depending on the type of field trip (or trip category).
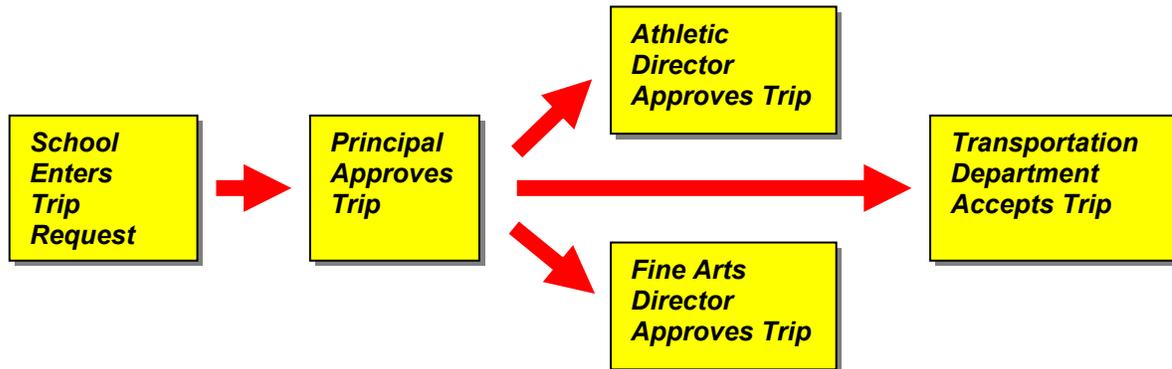
The school enters the request and it is sent through one of many approval paths, depending on factors such as the school and the type or category of the field trip. A school user enters the original trip request and the Principal is the first to review and approve all trips. At this point, if the field trip is not categorized as either an athletic or fine arts trip it is sent directly to the Transportation Department to accept or deny, otherwise the field trip is reviewed according to its type. For example, the Fine Arts Director approves art-related trips (such as a request by the school's theater department) and the Athletic Director approves athletic trips (such as an out of town game). Once the appropriate approval is completed, the trip request is sent to the Transportation Department.

ⓘ **T.O.M Tip**	By reviewing the examples in this chapter, you should be able to set up your own approval roles for a variety of situations. We suggest that you take a few minutes and chart out your approval paths before you start. Be organized and take it one step at a time. You'll find it worth a little extra time and effort.

To model this example you will need three approval paths. An Athletic approval path for athletic trips, a Fine Arts approval path for art trips, and a third (School) path for all other kinds of field trips. The key to requiring different approval paths for different types of trips is T.O.M.'s trip category (to learn how to create a new Trip Category refer to Field Trip Categories in, *Chapter 3 Entering Lookup Lists* of the *T.O.M. Getting Started Manual*). Each approval path will be associated with a trip category for every customer.   Let's create the three approval paths!

To set up the approval paths:

- First, create an approval role for the three approvers; the Principal, the Athletic Director, and the Fine Arts Director. See the section, *Create the Approval Role*, previously discussed in this Chapter for details.
- Second, assign the roles you created to new or existing T.O.M. users as applicable. See the section, *Assign the Role to a New or Existing User*, previously discussed in this Chapter for details.

- Third, establish three approval paths:

  o Athletic – Create an approval path using the Principal role as the first approver and the Athletic Director as the second (and final approver). For details on creating this type of approval path see *Establish the Approval Path*, previously discussed in this Chapter under the section *Creating an Approval Path with More Than One Approver*.

  o Fine Arts – Create an approval path using the Principal role as the first approver and the Fine Arts Director as the second (and final approver). For details on creating this type of approval path see *Establish the Approval Path*, previously discussed in this Chapter under the section *Creating an Approval Path with More Than One Approver*

  o School – Create an approval path using the Principal role as the first and only approver. See the discussion titled *Establish the Approval Path* under this Chapter's *Creating an Approval Path with One Approver* for details.

- Fourth, associate the School approval path with all T.O.M. customers. The T.O.M. Field Trip software provides the capability to assign an approval path to all active customers in mass. See the section *Setting Customer Approval Paths* in *Appendix B: Managing the Approval Paths* for detailed instructions on this T.O.M. utility.

- Finally, define different approval paths for specific types of field trips. Associate the Athletic trip category to the Athletic Approval Path for all T.O.M. customers, and the Fine Arts trip category to the Fine Arts Approval Path for all T.O.M. customers. The T.O.M. Field Trip software provides the capability to associate a field trip category to an approval path for all active T.O.M. customers. See the section *Assigning an Approval Path to a Customer / Trip Category* in *Appendix B: Managing the Approval Paths* for the details on this T.O.M. utility.

That's it! You have just set up and put into effect multiple approval paths with different personnel as approvers depending on the type of field trip for all of your schools (or customers).

In the above example every school (or customer) in the district followed the same approval policy. We assigned the School approval path to all customers, the Athletic Approval Path for Athletic type trips to all customers, and the Fine Arts Approval Path for Fine Arts type trips to all customers. With T.O.M. WebTrips you have the flexibility to customize the approval policy by school. T.O.M. and WebTrips can accommodate a wide variety of approval scenarios!

For example, field trips from your district's elementary schools only require the Principal's approval while high school trips require approval by the principal plus the activity director if the trip is for an Athletic or Fine Arts activity. In this example, you would assign the School approval path to all schools the same way as in the fourth step of the previous example. Then, instead of defining approval paths for the different trip categories for all customers, you would make this association at the high schools ONLY. WebTrips always looks at the setup for the specific customer requesting the trip to determine what approval paths should be followed for the request. To set up a unique approval policy for a particular school or customer you would use the Customer Maintenance screen in T.O.M.. Let's see how!

Assigning an Approval Path to a Customer / Trip Category

1. In the T.O.M. Field Trip Software - Open the File menu, and choose the Customer option; the Customer Search screen is displayed (Figure 3-22).

2. Select a customer and click Edit.
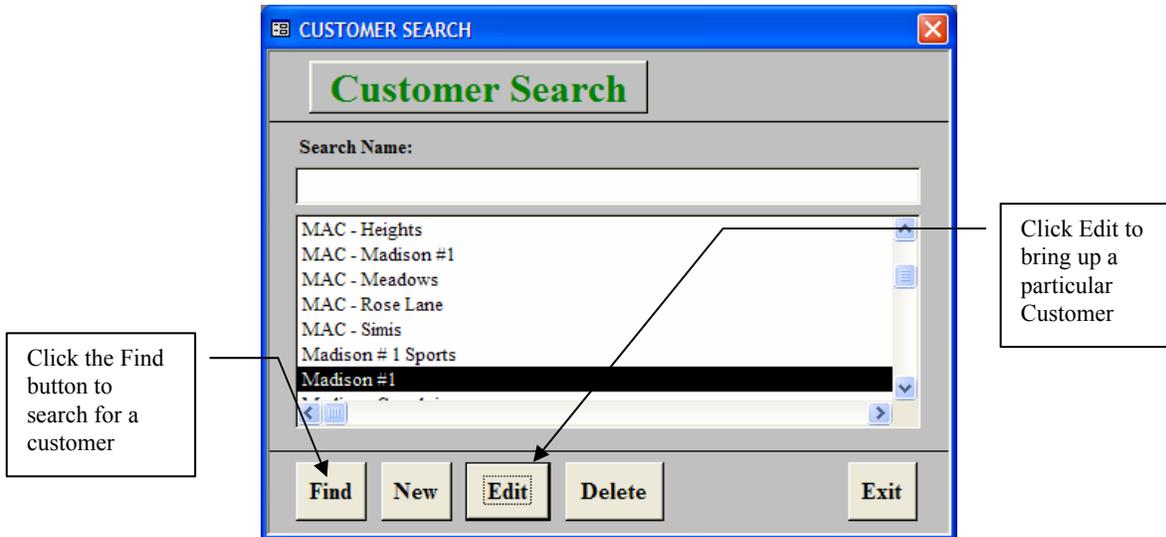
Figure 3-22. Find the customer with the Customer Search screen

Click the Find button to search for a customer

Click Edit to bring up a particular Customer

3. The Customer Maintenance screen is displayed (Figure 3-23).

To add or change the approval path for this customer, click the drop down and select from the list.

Click Approval Paths by Trip Categories button

This approval path will always be used for this school, unless the trip request is assigned to a Trip Category that has been associated to a different approval path in here.
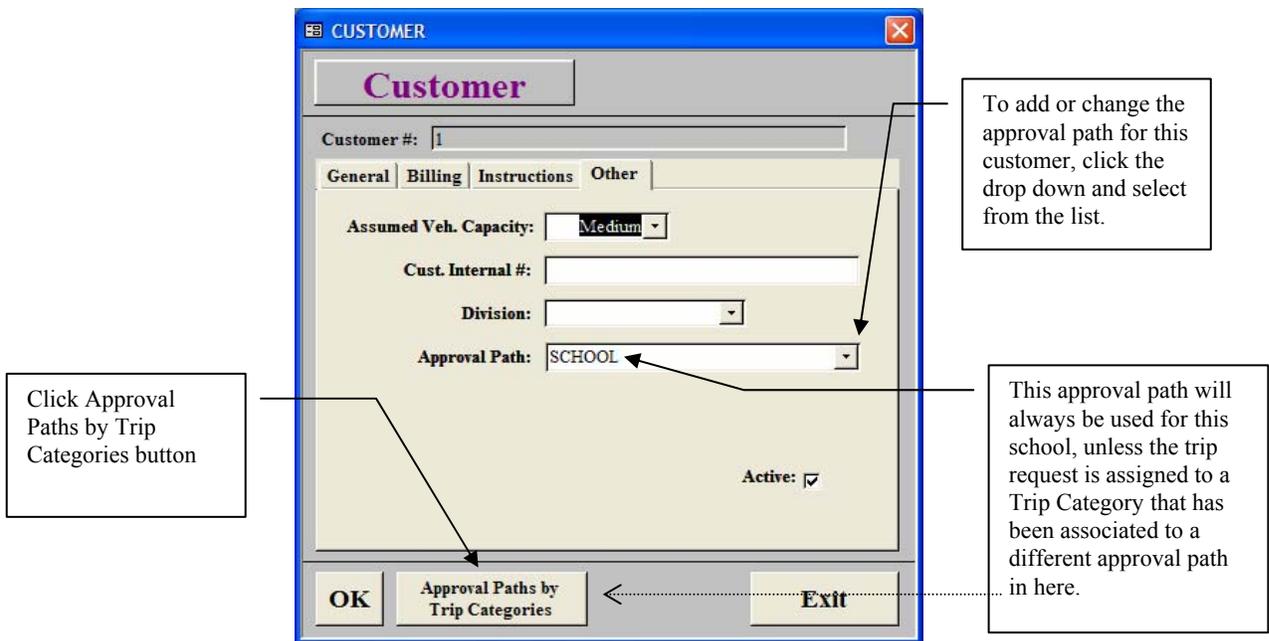
Figure 3-23. The Customer Maintenance screen has four tabs; select the Other tab

4. Click the Approval Paths by Trip Categories button. The Customer / Trip Categories screen is displayed (Figure 3-24).

Figure 3-24. The Customer / Trip Categories screen

Click the
New button

5. Click New. The Customer / Trip Category screen is displayed (Figure 3-25).

First, select the
appropriate Field
Trip Category (e.g.
Athletic)

Second, select the
appropriate Approval
Path (e.g.
AthleticApproval)

Third, click
the OK
button
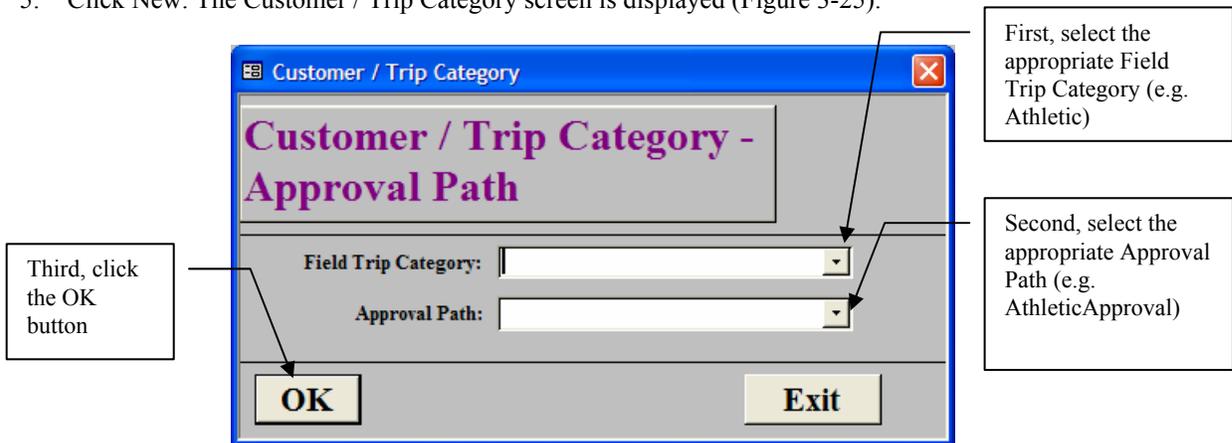
Figure 3-25. Select the appropriate Field Trip Category and Approval Path

6. Select the appropriate Field Trip Category and Approval Path from the drop-down lists. Click OK to save and exit.

That concludes *Chapter 3: Setting Up Approval Paths*; please refer to *Appendix B: Managing the Approval Paths* for a more detailed discussion on Assigning Approval Paths to Customers and to Customers' Trip Categories, Removing Approval Paths, and the Missing Approver Report.

ⓘ *T.O.M Tip*