



DISTRICT SCHOOL BOARD OF PASCO COUNTY SCHOOLS APPROVING/REJECTING PENDING FIELD TRIPS QUICK START GUIDE

Activity: Approving/Rejecting Field Trips

Approving/Rejecting Pending Field Trips from Dashboard

1. Click **Action Items** tab
 - a. Action Items tab is the most efficient tab to approve/reject trips as it only displays pending trips
2. Select trip from list - trip selected will be highlighted
3. Select **Approve/Reject** in ribbon
 - a. If **rejecting** a trip a **reason** will be required -Trip creator will receive email stating rejection reason
4. A confirmation message displays – select **Yes** to continue and complete the transaction or **No** to return to the dashboard to revise transaction approval

Approving/Rejecting Pending Field Trip from Detail

1. Click **Action Items** tab
 - a. Action Items tab is the most efficient tab to approve/reject trips as it only displays pending trips
2. Select trip from list – trip selected will be highlighted
3. Select **Detail** in ribbon
4. Select **Approve/Reject** in Ribbon
 - a. If **rejecting** a trip a **reason** will be required -Trip creator will receive email stating rejection reason
5. A confirmation message displays – select **Yes** to approve or **No** to exit confirmation box

Dashboard Searching and Filtering

1. Tabs
 - a. Upcoming Trips: Any trips coming up within the next **two months**
 - b. Action Items: All pending trips
 - c. This year: Any trips within Fiscal year (7/1-6/30)
 - d. All Trips: All trips for school/department
2. Filtering – leaving filtering criteria blank will default to all trips
 - a. Workflow Status
 - b. Begin/End date
 - c. Destination/Contact
 - d. Workflow Status



It is recommended to look for any field trips under the **Action Items** tab **once per week** for any **Pending** field trips



Using buttons in ribbon without selected item will affect the first item in filter



Select **Refresh Dashboard** to update recent/updated data