Product Family

How do I configure approvals?

FA Latest

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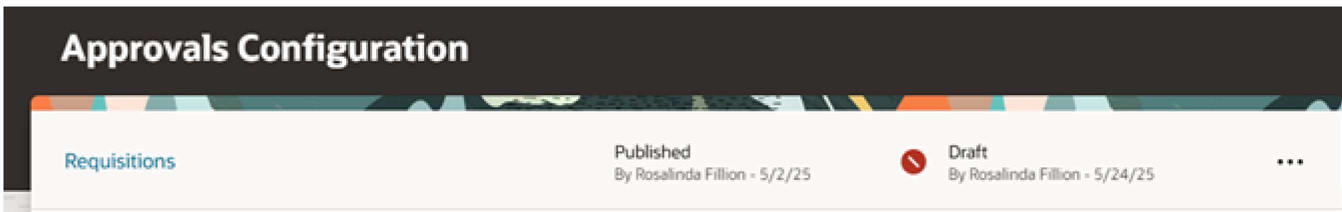
1 How do I configure approvals?

Get Started

Implement your approval policies by defining a step flow and rules to route approval tasks to the right approvers.

Click an approval type to start configuring a draft. After you test and publish, you can make changes in an iterative approach, building and testing versions to accommodate planned policy changes without affecting published approval types.



This table describes a typical process for configuring an approval type.

Navigation: Navigator > Configuration > Approvals Configuration

Configuring an Approval Type

Step	Description
Create routing patterns	Define reusable routing patterns that you can reference when you create rules.
Define approval type step flow	Map out the approval routing with serial or parallel steps. Steps contain rules that determine whom to assign approvals to.
Create rules	For each step in your flow, define the conditions to be met for the specified approval routing to happen.
Test routing	Try out your routing with existing transactions in the current environment and review the results to ensure that the assignment occurs as designed. In the routing test results, review and resolve any errors or warnings.
Publish	Publish the approval type to make it active. If the approval type already has a published version, you overwrite the existing published configuration.
Export and import	Download the draft or published configuration for an approval type. When you later work on a draft for the same approval type, you can import that .json file to use that configuration as the starting point.

How Do I Route Tasks to My Approvers?

Define routing patterns to build parts of an approval process that you can use in your step flow and assignment rules. For example, you can define a rule to get approval from an approval group instead of a specific user. Routing patterns work together, so for example, you can set an approval group as the designated approver in an approval authority.

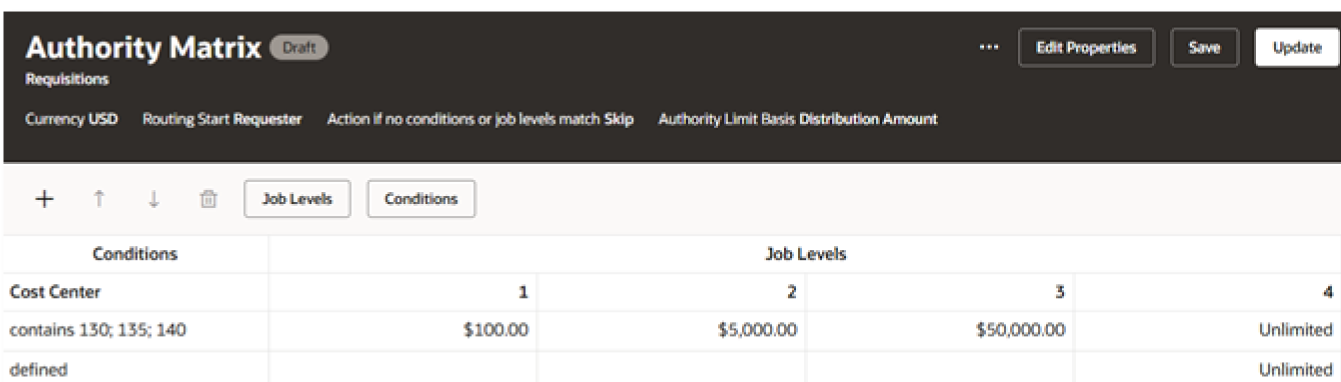
You can think of routing patterns as an alias. Changes made to a pattern are reflected wherever they're used.

Routing Patterns

Routing Pattern	Description
Approval group	Create a group of users you can make assignments to. Require approval from the first responder, all group members, or in sequence.
Authority matrix	Define conditions and use the supervisory hierarchy and job level assignments to determine a supervisor with a sufficient spending limit to assign approvals to.
Approval authority	Map condition attributes, the conditions and limits you want met, and approvers or approval groups to assign approvals to.
Supervisory hierarchy	Use the supervisory hierarchy to determine the assignee, based on a starting point in the hierarchy and the number of levels or a specific job level.
Named condition	Name a set of condition attributes that can then be referenced in steps, approval authorities, or authority matrixes.

Create an Authority Matrix

Set up rules and conditions to return a set of users for assignment who have sufficient job level assignments and spending limits to act on approvals.

1. 

   You can think of routing patterns as an alias. Changes made to a pattern are reflected wherever they're used.

1. Add an authority matrix and set the properties, including:

Property	Description
Routing Start	Beginning user type (for example, Requester) and job level of the approver in the matrix.
Action if no conditions on job levels match	This determines an outcome if no rules are met. You can raise an error, skip the assignment, reject the task, or automatically approve the step.
Authority Limit Basis	For a requisition, there are two amount fields for distribution. Choose the basis you want to use. Distribution Amount accounts for percentage distributions by different charge accounts. Distribution Approval Amount accounts for taxes, shipping, VAT, and other miscellaneous charges that should be reflected in the approval routing.
Authority Limit Calculation	This determines how the distribution amount for the approval is calculated, based on all distribution amounts or only those meeting the conditions in an associated step.

2. Add the first condition.
   a. Click Add Condition to add condition attributes.
   b. Select the Condition Details, either an attribute or a named condition.
3. Set the number of levels you want to support in the matrix. For example, you could have approvals at different job levels, skipping some.
4. Add one or more rows to create the matrix.
5. After you've added rows to your approval matrix, click in their condition attribute cells and define the conditions for the actions you've set.
6. Enter spending limits for the job levels.

Create an Approval Authority

Create rules, conditions, and limits to determine assignment to users who can act on approvals. An approver can be either an individual or an approval group. You can base the authority on limits to determine the assignment. If an approver meets the rules but has an insufficient limit, they're added to the approver list and remaining rules are evaluated.

1. Once an approver with sufficient spending limit is found, the list of approvers is used for assignment. If you choose not to use limits, you can assign to the first matching approver or all matching approvers.

1. Add an approval authority.
2. Enter a name for the approval authority.
3. Optionally, select Assign limits to approvers to specify limits for the authority.
   a. In the Limits based on drop-down, select Distribution Amount or Distribution Approval Amount.
   b. Select the currency.
4. Optionally, select Limits based on sum to base limits on the total of the matching condition attributes. If selected, the sum of all distribution amounts for a matching rule are used to evaluate the limit.

5. In the Action if no rules match drop-down, choose an outcome if no rules are met. You can raise an error, skip the assignment, reject the task, or automatically approve.
6. Add the condition attributes and click Apply.
    a. Click Add Condition to add more condition attributes.
    b. Select the Condition Details, either an attribute or a named condition.
7. Click Add Rule.
8. Click in condition attribute cells and define the conditions. Select an operator, for example equals, and set a condition value, either a specified value or a value from attribute.
9. If you're assigning limits to approvers, enter the limits for each rule.

Create a Supervisory Hierarchy

Assign approvals based on the supervisory hierarchy, designating assignments based on a starting point and the number of levels or minimum and maximum level in the hierarchy.

1. Add a supervisory hierarchy.
2. In the Start of hierarchy drop-down, select or search for the user you want to start from, for example you can start from the Manager of the Preparer or Manager of Requester for approval.
3. Select whether the hierarchy uses Number of levels or Job Level.
4. If you select Number of levels, enter the number of levels the hierarchy should include and select or search for the Highest supervisor allowed in the approval routing.
5. IIf you select Job Level, enter a minimum job level, required approvers, and the highest supervisor in the hierarchy.

Create a Named Condition

Create a reusable condition that you can reference in rules or other routing patterns. Once referenced, any changes to a named condition apply wherever the named condition is used.

1. Add a named condition.
2. Enter a name and description for a new named condition.
3. Add a category to your named condition. Select the condition attributes, drag and drop to order them if there are more than one, and click Apply. The condition attributes appear as columns in the grid
4. Define the condition. Click in the condition attribute's column cell and specify an operator, value type, and values. The value can be either manually entered, or in cases where a condition attribute has a list of values, you can select from or search that list to set a value for evaluation.

Create a Member List

Set up a reusable set of users for approval assignment.

Changes made to a member list are reflected wherever they're used.

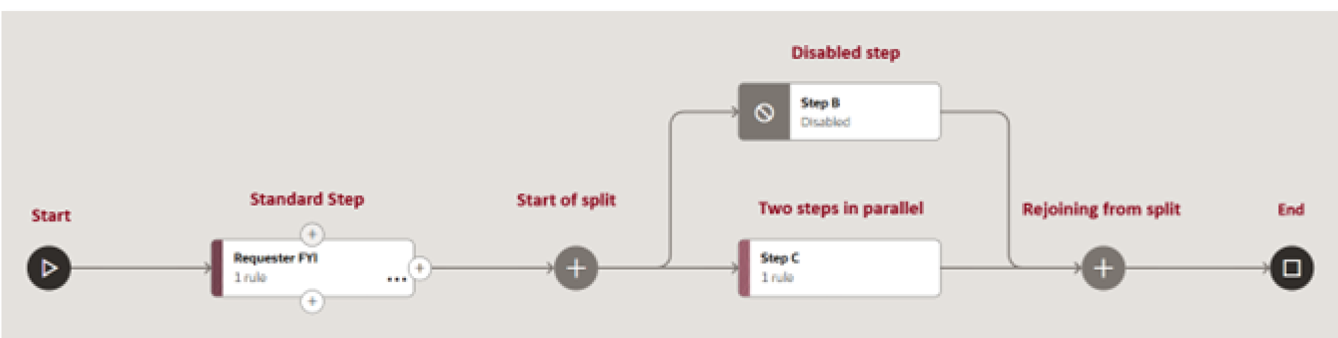
1. Create a new member list or duplicate an existing one. Enter a name for the list and a description.
2. In the Members drop-down, select or search for users to add to the list.
3. You can move the users up or down in the list.
4. Optionally, export and import your member lists. When you export a member list, it's downloaded as a json file that can then be imported.

Define the Step Flow of an Approval Type

You can edit a step or add a new one to specify which approvers or groups are assigned the task for approval, and how tasks are resolved if they don't meet any of the rules you define to represent your organization's policies. For example, you might use separate steps to implement the requirements of different parts of your organization, say Human Resources or Finance.

Steps contain rules with conditions that must be met for the task to be assigned to approvers, and the actions that result from applying those rules. You can define rules based on your business processes and decisions, such as whether to route to approvers in serial or parallel, whether approvals should be based on job levels or approval groups, or other routing patterns.

Each step flow must have one step and can have as many serial or parallel steps as needed, based on your requirements. You can also delete, disable, or cut and paste steps in your step flow.



Create or Edit a Step

When you create a new step or edit the initial default step in a new draft approval type, enter the following in the step details:

- Currency: If your rules are based on a price, values assigned to amount attributes are converted to this currency when necessary.
- Routing to Assignees: Determines whether rules are evaluated for each rule in sequence or all at once.
- Catch-All Action: Default outcome if no rules are met.

Catch-all action	Description
Raise error	Raise an error.

Catch-all action	Description
Approve automatically	Approve the task.
Reject automatically	Reject the task.
Skip This Step	Skip to the next step in the step flow.
Obtain Approval	Obtain approval from a user, role, or an approval pattern. Select a user or object to obtain approval from, for example, a chosen user, approval group, or a supervisory hierarchy, among others.
Send FYI	Send an FYI notification or email to a user, role, or an approval pattern, for example members of an approval group or a supervisory hierarchy.

Add or Edit Rules

Edit a step to add rules, each with a name, condition, and action. You can disable rules so that they're not used, or alternatively require them to always be applied before a step is completed.

Click **Conditions** and select transactional attributes or named conditions used to evaluate the outcome of an approval. Each condition attribute is represented in the grid as a column. To define the rule's condition, click in the condition attributes' column cells and specify an operator, value type, and value.

Click **Add Rule**, give the rule a name, and set the Always apply this rule option, if applicable. To define the rule's condition, click in the condition attributes' column cells and specify an operator, value type, and value. The value can be either manually entered, or in cases where a condition attribute has a list of values, selected. To disable a rule, select it and click Disable Rule.

In the grid, click the Action cell for a rule to specify to specify what happens when the rule is met.

Action	Description
Obtain Approval	Obtain approval from a user, user from attribute, role, or an approval pattern.
Approve automatically	Approve the task.
Reject automatically	Reject the task.
Skip Remaining Rules	Skip to the next step in the step flow.
Send FYI	Send an FYI notification or email to a user, role, or an approval pattern.

Migrating from Test to Production

Prepare and download migration sets to import from a test environment to a production environment.

1. Prepare and migrate an approval type.

1. Select an approval type and click **Prepare Migration Set**.

2. Select the transaction types you want to prepare and click **Prepare**.
3. Click **Download** and extract the migration set.
4. Navigate to the Approvals Configuration page in the production environmen and click **Import Migration Set**.
5. Select or drag the migration set json file you downloaded.
6. Click **Import**. The migration set is imported as a draft approval type.

Tips and Considerations

This table has some tips and considerations.

Tips and Considerations

Tip	Description
Keep an eye out for fields that can be blank	A blank field in a rule may invalidate the rule. For example, if the Overriding Approver field is defined as an attribute for an action, you may need to validate it's not blank before using it.
Use either Firefox or Chrome browsers	Some of the lists of values are blank when you use Edge or Safari browsers. Also, not everything in the step flow is placed correctly in Safari.

When to Move to Redwood Approvals

You should move to Redwood Approvals if your approval workflow tasks meet the following criteria: