Approval Request Configuration

Module Guide: Approval Request Configuration Report

Module Location

Settings > Document Settings > Approval Request Configuration Report

Module Purpose

This module serves as a reporting tool to display the complete **approval matrix** for all workflows within the system. The report provides a detailed overview of who must provide approval for each document type, in what sequence, and based on what criteria (e.g., transaction value). This module is highly useful for auditing, verification, and internal documentation purposes.

1. Report Filter Page

Before displaying the report, the user can define filter criteria to narrow down the results.

View Explanation

- **Approval Request Name**: A dropdown menu to filter the report by a specific document or request type (e.g., `AP Credit`, `Sales Order`). Select "All" to display the configuration for all request types.

- **Requester**: A dropdown menu to filter the report based on who submitted the request (the requester).
- **Action Buttons**:
  - **Display Report**: To generate and display the report on the screen based on the selected filters.
  - **Export to MS Excel**: To download the report data in Microsoft Excel format for further analysis or archiving.

2. Report View

After the filters are applied and the "Display Report" button is clicked, the system will generate a structured report detailing each approval workflow.

Report Column Explanations

- **Approval Request Name**: The type of document whose approval workflow is being displayed.
- **Email Reminder**: Indicates whether email notifications are active for this document type.
- **Automatic Approval**: Shows if there are any automatic approval rules.
- **Approval Sequence**: The method used for the approval order (e.g., Sequential Approval).

- **Requester**: The position or user who initiates the approval request.

- **Approval Order**: The step number in the tiered approval workflow.

- **Amount From / To**: The transaction value range that requires this level of approval.

- **Approved By**: A list of positions or usernames that must provide approval at that step and for that value range.

- **Must be filled**: Indicates whether this approval step is mandatory.

Steps to Create the Report

- **Access the Module**: Open the module via the menu Settings > Document Settings > Approval Request Configuration Report.

- **Select Filters**: Specify the report criteria in the **Approval Request Name** and **Requester** dropdowns. Leave as "All" to view the entire configuration.

- **Generate Report**: Click the **Display Report** button to see the results on the screen, or click **Export to MS Excel** to download it.

Integrated Workflow & Business Process

- This module is **read-only** and does not alter any configurations; its purpose is purely for reporting.
- This report is a vital tool for system administrators, internal audit teams, and managers to verify that the approval workflows configured in the **Approval Request Settings** module are in line with company policy.
- Data exported to Excel can be used as audit evidence or for in-depth analysis of the efficiency of the approval workflows.

Tips & Important Notes

- Use this report periodically to ensure there are no configuration errors in the approval workflows that could hinder or jeopardize business processes.
- This report provides full transparency over the entire **chain of approval** that exists within the system.
- The export to Excel function is very useful for documenting the approval matrix at a specific point in time.

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