Approval Request Settings

Module Guide: Approval Request Settings

Module Location

Settings > Document Settings > Approval Request Settings

Module Purpose

The **Approval Request Settings** module is used to manage and configure the approval workflows for various types of documents and transactions within the system. Users can define the approval type, the sequence of approvals, and other options such as email reminders for each type of request.

1. Main View (List of Approval Configurations)

This page displays a list of all document or transaction types that require an approval workflow. Users can modify the approval workflow configuration for each item directly from this view.

View Explanation

- **Search Filter**:
    - Allows users to search for a configuration by **RequestID** or other parameters to quickly find a specific request type.

- A **Search** button applies the filter, and a **Show All** button clears it to display the full list.

- **Approval Configuration Table**:
  - **RequestID**: A unique ID representing each request type (e.g., 11 for a Purchase Order).
  - **Approval Request Name**: The name of the document or process whose approval flow is being configured (e.g., Purchase Order, Sales Order, Delivery Order).
  - **[Form Type]**: A dropdown selection (Simple/Complete) that likely determines the complexity or layout of the form during the approval process.
  - **Email Reminder**: A checkbox to enable or disable the sending of email notifications to approvers.
  - **Automatic Approval**: A checkbox that, if enabled, will likely cause the request to be approved automatically without manual intervention.
  - **Approval Type**: Defines the method of approval, for example, **Based on Position**, which means the approval flow will be based on the user's job title or position.
  - **Approval Sequence**: Sets how the approval order is processed, for example, **Sequential Approval**, meaning approvals must be done in a tiered sequence as defined.

- **Action Button**:

- **Update**: A button to save all changes made in the configuration table.

2. Steps to Change Approval Configuration

Since this interface allows for direct editing, the workflow is as follows:

Step 1: Identify the Request

Find the row with the **Approval Request Name** whose configuration you want to change.

Step 2: Change Configuration Values

Modify the values in the available columns directly in the table:

- Select an option from the dropdown in the **[Form Type]** and **Approval Sequence** columns.
- Check or uncheck the **Email Reminder** and **Automatic Approval** boxes as needed.

Step 3: Save Changes

After making all necessary changes to one or more rows, click the **Update** button at the bottom of the page to save all the new configurations.

Integrated Workflow & Business Process

The configurations set in this module directly determine who, how, and in what order a document (like a **Purchase Order**) must be approved in its respective module.

- For example, if a **Purchase Order** is set with an **Approval Type** of **Based on Position** and an **Approval Sequence** of **Sequential Approval**, then when a staff member creates a Purchase Order, the approval request will be automatically sent to their superior (e.g., a Manager) according to the position hierarchy set in the system.

- Enabling the **Email Reminder** will help speed up the approval process by notifying the relevant approvers.

Tips & Important Notes

- This module is crucial as it controls the approval workflows for the entire company. Changes must be made with a full understanding of the organizational structure and business processes.

- Ensure that the position and user hierarchies are correctly defined in the system before configuring a workflow that is **Based on Position**.

- The **Automatic Approval** setting should be used with extreme caution, as it will remove a layer of manual verification for the associated documents or transactions.

- This module should ideally only be accessible to system administrators or managers responsible for business processes.

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