

Approvals Table

The Approvals table holds all of the approvals that are sent to users and approved or rejected by them. Each record in the table is an individual approval or rejection linked to a parent Change Request, Contract, or Document record.

Approvals are generated automatically based on a workflow and its approval templates, and can also be created ad hoc by users with the appropriate privileges, either in addition to the predefined approvals or instead of them.

Use Case for Contracts

The process begins when the Create Approvals button is clicked in a contract record. Contract approval records can be created in two ways:

1. From Approval Templates using a conversion action
2. Manually on an ad hoc basis.

For information on starting the approval process for a contract, refer to the Handling Approvals section.

Each approval record stores the parent Contract ID, Approval Team, and Approver, the user who submitted the approval. On the History tab, the Date Approved/Rejected field captures and displays the timestamp of the approval.

Approval

Save
Cancel
Details
Related Approvals
Emails
History

 << >>

ID	128	Status	Pending Approval
Approval Title	Legal Review		
	<div style="display: flex; justify-content: space-around; margin-top: 5px;"> Approve Permanently Reject </div> <div style="margin-top: 5px;"> Require Changes </div>		

Approval Details

*Step Number	1	Related To	Contracts
*Approval Team	Legal Team	Approver	Agiloft System

Approval Notes

Approval Notes

Approval Running Notes

Approval Running Notes

Attachments

Approval Packet Files

- Contract ID 145 - 6 - 7.docx
- Contract ID 145 - 6 - 8.docx
- Contract ID 145 - 6 - 8.docx
- Contract ID 145 - al-non-disclosure-agreement.docx - Document Version 1.docx

Approver Updated File(s)

[Attach/Manage](#)
 Drag&Drop files

Contract Details

Contract ID	145
Contract Title	NDA for Acme Micro
Contract Company Name	Acme Micro
Contract Owner	Helen Jensen
Contract Description	NDA for Acme Micro
Contract Start Date	May 28 2017
Contract Amount	
Contract Files	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Attach/Manage Drag&Drop files </div>

Notes about the approval or rejection are entered into the Approval Notes field. When the record is saved, the notes are appended to the All Contract Approval Notes field and are visible from any approval linked to that Contract. Additionally, the notes are appended to the Approval Notes field in the parent contract record, located on the Approvals tab.

Approval Running Notes

Approval Running Notes

[Agiloft System Apr 28 2017 13:36]
This contract needs signification revisions.

Only Approvers and members of the specified Approval Team can Approve, Require Changes for, or Permanently Reject approval records. Users updating the Status to Permanently Rejected or Requires Change must enter Approval Notes.

Use Case for Documents

To begin the approval process for documents, select Yes for Requires Approval on the Progress tab of a Document record. Select one or more Approver(s) who will be assigned to review and approve the document. Click Submit for Approval to generate the approval records.

Document

[Save](#) [Cancel](#) [Details](#) [Progress](#) [Source](#) [Emails](#) [History](#) [«](#) [»](#)   

ID: 18 Status: Pending Approval

*Title: Internal Email Policy for HR

Assigned Team: Document Management Team Assigned Person: _____

Potential Approvers

*Requires Approval: Yes

Approver(s): Karen Sneller, Rick Peterson 

Approvals and Approval Notes

Approvals

Status: 2 record(s) found, 1 pages. Click [here](#) to re-count records.

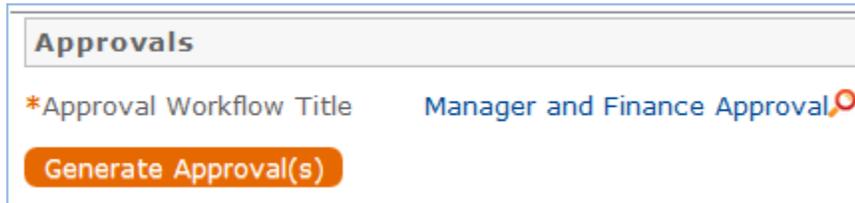
[Delete](#)

<input type="checkbox"/>	Edit	ID ↓	Related To	Approver	Status	Document(s)
<input type="checkbox"/>		143	Documents	Rick Peterson	Pending Approval	
<input type="checkbox"/>		142	Documents	Karen Sneller	Pending Approval	

All Document approvals are created with a Status of Pending Approval. Document approvals are parallel, i.e. all document-related approval records are created with a Step Number of "1" through conversion. Notes added to document approvals are appended to the Approval Notes field in the parent document. For more information on approvals for documents, see the [Document Management Table](#) section.

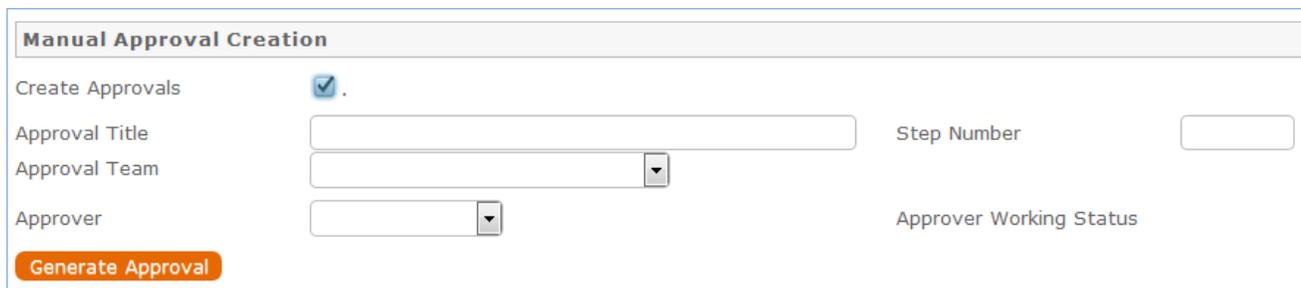
Use Case for Change Requests

The default status for a new approval record is Queued. There are two main ways in which an approval is created for a change request. The first is by the change manager clicking a button on the Approvals tab:



The screenshot shows a tab titled "Approvals". Below the tab, there is a label "*Approval Workflow Title" followed by the text "Manager and Finance Approval" with a small red circle icon to its right. Below this, there is an orange button with the text "Generate Approval(s)".

This will generate all of the approvals for that workflow. If an approval template's Approval Usage field has a value of Conditional, then it is not created unless the condition is met. The other method is for a change manager to create an ad hoc approval using the Create Approvals checkbox in the change request on the Approvals tab:



The screenshot shows a form titled "Manual Approval Creation". It contains a checkbox labeled "Create Approvals" which is checked. Below this are several input fields: "Approval Title" (text input), "Approval Team" (dropdown menu), "Approver" (dropdown menu), "Step Number" (text input), and "Approver Working Status" (text input). At the bottom left of the form is an orange button labeled "Generate Approval".

Note that this checkbox is only visible if the service was defined to permit ad hoc approvals and only until the approvals are launched. The approvers are not notified until the Change Manager launches the approval process, by clicking the Launch Approvals button. At that point, the lowest numbered approval record will be updated to Pending Approval and the Approver or the Approval Team (if the Approver field is blank) will be notified that the approval is due. If there are any concurrent approvals for a particular step, the approval record will be updated with those concurrent approvals.

If an approval step is marked as Auto-Approved, the Approval will be updated to Approved and the Approver or the Approval Team will be notified of the auto-approval, unless the Notify for Auto-Approval field has a No value. This is a method of notifying someone about a change without requiring them to respond.

The approver can approve the change by email through a hotlink or click a Require Change or Reject hotlink to edit the Approval record directly and enter some comments and click the appropriate button. If editing the approval record directly, comments will be required if the approval record is rejected or marked as requiring changes.

A validation rule requires that any individual who clicks one of the three buttons to approve, reject or require changes is a member of the Approval Team.

Whenever the approval notes field is updated, a rule will copy the update into the linked Change Request's All Approval Notes append only field and the field in the approval will be blanked out.

If the approver marks the approval as Requires Change, the linked change request will not be changed, but the Change Management team and Change Manager (if any) will be notified and they will decide whether any changes made require restarting the whole approval process or just carrying on from the rejected approval. If they want to start over, they will click a "Relaunch Approvals" button and that will first set all linked approvals to Queued and then launch the first step again. Otherwise they can set the "requires change" approval back to Pending approval for the process to carry on from there again.

If the approval is marked Approved and there are no concurrent approvals, the next approval record in the sequence will be updated to Pending Approval and the Approver or Approval Team will be notified. If there are concurrent approvals, all concurrent approvals must be completed prior to the next approval step being updated to Pending Approval. The approver and the date approved will be updated to reflect whoever clicked the Approve button.

If the approver marks the approval as Permanently Rejected, the linked change request will be updated to a status of Rejected and the Requester and Change Management Team notified. The user will be required to resubmit the change request if still required, with appropriate changes. All other approvals in the Change Request in a status of Queued or Pending Approval will be updated to Not Needed. If an approval is updated from a status of Pending Approval to Not Needed as a result of the above action, the Approver or Approval Team will be notified that their approval is no longer necessary.

Ownership of Approvals

Approval records and Approval Template records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.