

Approval Management

The Approval Management process consists of three tables, listed below: Approvals, Approval Workflows, and Approval Templates. Approval Workflows are used by default in the Standard System Demo within the Change Request, Service Request, Contract, and Document tables, but can be added to other tables as needed. In the Standard System Demo, the Approvals table can be found under the Contract Management section of the left pane. The Approval Workflow and Approval Template tables can be found under the Contract Setup section of the left pane.

To begin using automated approvals, you generally begin by creating an Approval Workflow record. Within an Approval Workflow record, you can create a step-by-step process for how Approvals should occur, as well as define where the Approval Workflow should be available. The steps of an Approval Workflow are called Approval Templates. The Approval Templates within the Workflow should be numbered in the order of approval using the Step Number value in each Template, and can be set to trigger either sequentially or concurrently. Each Approval Template record can only be used by a single Approval Workflow record. When an Approval Workflow is selected and triggered in a process record such as Contracts, the Contract ID is added to the Approval Templates within the selected workflow, which triggers a conversion of the Approval Templates to create new records on the Approvals table using the template as a guide.

- Approvals Table
- Approval Templates Table
- Approval Workflows Table