Approval Templates Table

The Approval Templates table holds Approval Template records, which can be thought of as steps of an Approval Workflow. Approval Template records predefine the Approval Team and Approvers, and control whether the approval is Conditional or Required. Each Approval Template can only be used by a single Approval Workflow record, so there is a one-to-many relationship between Approval Workflow records and Approval Templates. Approval Template records can only be related to Contract, Sourcing Event, and Change Request records.

Use Case

Approval Templates can be created by users in the Admin, Admin Import, Business Admin, Contract Manager, Change Manager, Internal Supplier Manager, and Service Manager groups. New Approval Template records are normally added from under the All Approval Templates section of an Approval Workflow record. Creating an Approval Template record from the Approval Workflow record is best practice, because it automatically links the Approval Template record to the Approval Workflow record. However, if an Approval Template is created directly from the Approval Template table, a Workflow Title should be manually added in the record layout's common area. The required fields are Approval Title, Assign Approval Based On, and Step Number. Step Number and Approval Title are used when converting the Approval Template record to an Approval record.

Each Approval Template record contains information about the Approval Workflow that uses it, but Approval Template records can consist of different layouts based on what is selected from the following fields:

- **Approval Usage**: This field allows you to set whether the approval is Required or Conditional.
- **Approval Type**: This field allows you to choose whether it's an approval, review, or notification. It is available as an option only for Contracts.
- **Assign Approval To**: This field allows you to choose whether approvals are filtered to a specific team, a specific person, or both.
- **Step Number**: This field allows allows you to designate the order that the Approval Template record occurs in the Approval Workflow record.
- **Auto-Approve?**: This field allows you to choose whether or not an approval can be approved automatically. It is available as an option only for non-Contract records.

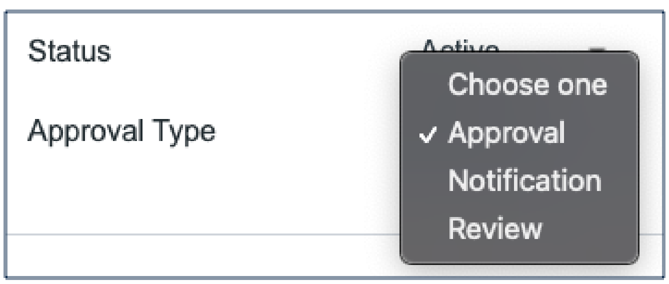
Approval Usage

Each Approval Template record contains information about the Approval Workflow that uses it, as well as whether the approval is Required or Conditional. You can determine these conditions yourself by selecting Conditional from the Approval Usage drop-down list and then filling in the Condition field using the Formula Help button. Both required and conditional Approval records are automatically generated when the Create Approvals button is clicked in the Contract record, a Sourcing Event is progressed, or the Generate Approvals from Workflow button is clicked in the Change Request record.

When Conditional is selected, the Condition field appears. The user can then input a formula that gets evaluated when an approval is generated. This formula can contain any number of conditions that can be linked together by operators such as "or", "and", "contains", etc. Typically, the Condition field contains a search criterion based on other field value(s) in the Contract or Change Request records. Conditional approvals are only generated if the condition is met.

The Approval Template record below is an example of a conditional Approval Template record that has had the approval condition defined in the Condition field. This example shows that this Approval Template is only generated for a particular Change Request record if the Risk if Done value of the Change Request record is Category 2 - Significant or Medium. The Related Records tab displays all other Approval Template records that are used in the same Approval Workflow.

Approval Type



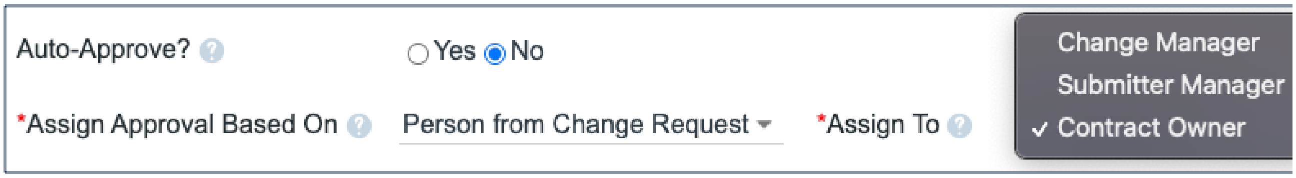
"Approval" is the standard Approval Type. This provides the approver options to approve, request changes, or reject the contract. "Review" allows the reviewer to provide feedback, but they cannot outright reject the contract. "Notification" informs the selected user via email without requiring any action on their part.

Assign Approval Based On

Approval Templates dictate where Approvals can be assigned to. Approvals can be assigned to either a relevant team from the parent record, a relevant person from the parent record, or a specific team and person. You can determine the type of parent record by checking the Related To field of the Approval Template record.

- To assign a relevant team, select "Team from Contract", "Team from Sourcing Event", or "Team from Change Request" and then select the relevant team from the Assign To drop-down list.

- To assign a person in a relevant role, select a user type, and then select the relevant role from the Assign To drop-down list.



- To assign generally, select "Assigned Team / Person." The Approval Team drop-down list contains every team in the system, and Approver contains every person in the team chosen in Approval Team. Although it's required to select an Approver Team, it is not required to select an Approver.

The selections in the Assign To field are based on records in the Replacement Variables table. Refer to the Replacement Variables Table section for more information.

Step Number

The sequence of Approval Template records depend on the values in the Step Number field. Approvals are generated and ordered based on Step Number, and have their Status changed to Pending Approval in ascending order of Step Number. To set up parallel Approvals, give the same Step Number to each Approval Template that should occur simultaneously. All Approvals with the same Step Number must have a Status of Approved in order to trigger the next step.

Notably, the rule that controls the triggering and ordering of approvals is managed from the Approval record, not the Approval Template record. Fields in the Approval record are used to determine if there are concurrent approvals and to define the relevant approval with the lowest Step Number. Not all sequences begin with a Step Number value of one, such as when the first step is a conditional Approval record marked Not Needed.

Auto-Approve?

Approval Template records can be used as a notification, instead of an approval, by setting the Auto Approve? field to Yes. When the template is converted into an Approval record, a rule in the Approval table automatically sets the approval's Status to Approved. If Notify for Auto-Approval is set to Yes, this rule also sends a custom notification message in place of the assignment notification.

Automation

In the Standard System Demo, the Approval Templates table contains three rules. These rules are accessed by expanding the Approval Templates table in the left pane, selecting Setup Approval Templates, and then selecting the Rules tab:

- **Edit: All Change Approval Edit Actions (web, API)**: This rule runs whenever an Approval Template record is edited by a user or another rule in the system. It uses an If-Then-Else action called I: Handle Flags to Generate or Check Change Approvals to ensure that Change Request approval templates still contain all the necessary information after being edited.

- **Create/Edit: Blank out fields based on Assign Approval Based On (web, API)**: This rule runs whenever an Approval Template record is created or edited by a user or another rule in the system. It uses two If-Then-Else actions called I: Set Approval Template Relationship and I: Blank out fields on Assign Approval Based On. I: Set Approval Template Relationship is used to set approval template relationships based on whether a parent record is a Contract or Change Request record. I: Blank out fields on Assign Approval Based On blanks out certain fields in the layout based on the value in the Assign Approval Based On field. For example, if Assign Approval Based On is set to Assigned Team / Person, the rule blanks out the Assign To field, since this field's functionality is replaced with the Approval Team and Approver fields.
- **Edit: All Contract Approval Template Edit Actions (web, API)**: This rule runs whenever an Approval Template record is edited by a user or another rule in the system. It uses an If-Then-Else action called I: Handle Flags to Generate or Check Approvals that does the same thing as Edit: All Change Approval Edit Actions (web, API) does, except this rule impacts Contract approval templates instead of Change Request approval templates.

Ownership

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.