Approval Workflows Table

The Approval Workflows table contains records that define the steps an Approval record must go through for different approval processes. The steps are predefined by the information included in the Approval Template records that are related to the Approval Workflow record. In other words, each Approval Template can be thought of as a step in the Approval Workflow. Each Approval Template defines an approver and the order that approval should occur in, as well as some other characteristics. An Approval Workflow record usually includes a combination of both parallel and sequential Approval Templates.

Although Approval Templates are only available for Contracts, Change Requests, and Sourcing Events (which can be for both Pre-Approval and Final Approval workflows), Approval Workflow records are built out for Contracts, Change Requests, Service Requests and Documents.

Use Case

Approval Workflow records may be created by members of the Admin, Admin Import, Business Admin, Change Manager, Contract Manager, Internal Supplier Manager, and Service Manager groups. Approval Workflows are created by either:

- Clicking New in the Approval Workflow table
- Clicking Clone Workflow in a previously-created Approval Workflow record. Clicking Clone Workflow also clones any related Approval Templates, so cloning is ideal when you need to re-use data in an already-used Approval Template.

Newly created Approval Workflow records have some required fields, marked by red asterisks, called Workflow Title and Related To. Workflow Title is used to name the workflow, and Related To is used to determine which table the workflow can be used with. Although the layouts stay the same for Change Request, Service Request, and Document records, some additional fields may be shown:

- If Contracts is selected in the Related To field, additional options allow the user to specify which Contract Types can use this workflow.
- If Sourcing Event is selected in the Related To field, additional options allow the user to specify whether the Approval Workflow will be available only as an initial Pre-Approval or as a Final Approval workflow.

Additionally, the value in the Related To field limits the Approval Workflow for use in Approval records of that specific record type only.

To actually define the steps needed in the Approval, Approval Workflow records require Approval Template records. Best practice is to add Approval Templates to the Approval Workflow record directly by clicking New under the All Approval Templates section. More information on how to design Approval Templates can be found at Approval Templates Table, specifically under the Step Number section.

The Approval Workflow record is usually selected for use in an approval process directly from, for example, the Contract record right before a user clicks Create Approvals. If a Contract record is created without selecting an Approval Workflow, though, the default value is Legal Approval (One Step). The system then generates required Approval records based on the Approval Template records within the Approval Workflow record selected next to Workflow Title.

Approval Workflow records are either in a Status of Active or Inactive. An active Approval Workflow record appears in the Workflow Title or Approval Workflow Title drop-down menu of a Contract or Service Request record, respectively. Workflows with a Status of Inactive are no longer available for use in the approval process, so inactive workflows do not appear in the drop-down menu as a possible selections. Admin group members can change a workflow from Active to Inactive.

Automation

In the Standard System Demo, the Approval Workflow table contains a single rule. This rule is accessed by expanding the Approval Workflow table in the left pane, selecting Setup Approval Workflow, and then selecting the Rules tab:

- **Create: All Create Actions (web, API)**: This rule runs whenever a new Approval Workflow record is created by a user or by another rule in the system. It consists of one If-The-Else action called I: All Create Actions, which contains two actions that runs when the Source Workflow ID value is not empty, which means the record has been created via cloning from another record. These two actions are a Linked Field action called L: Map ID into Source Workflow Approval Templates and an Update action called U: Set Cloned Workflow Title. L: Map ID into Source Workflow Approval Templates adds the Approval Workflow ID to the relevant Approval Template records, and U: Set Cloned Workflow Title updates the title to ensure that the new, cloned record has the correct title format for a cloned record.

Ownership

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