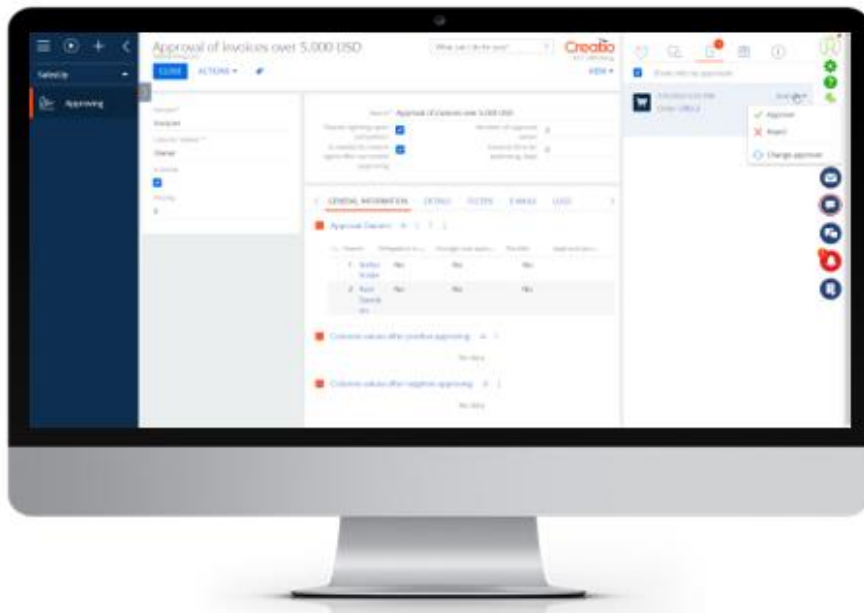




# APPROVAL FOR CREATIO



Guide to setup and utilization

12.12.2022

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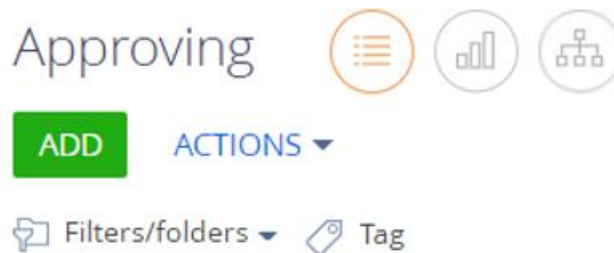
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# 1. Creating a new approving

**Example of a business case.** When creating an invoice over 5.000 USD, the process of approving starts. Approving decisions are made by finance and sales departments. The approving in departments occurs simultaneously during 2 days. After making a decision about the approving, a notification of the decision is made according to the notification templates.

## 1.1 Creation a new approving record

Go to the “Approving” section and press the “Add” button.



## 1.2 Filling on approving page profile

a) The “Section” field serves for choosing an approving section. Available sections for approving:

- Contracts
- Orders
- Invoices
- Contacts
- Accounts

Note. The sections are shown for which approving is enabled.

*Note. The sections are shown for which approving is enabled.*

In page record profile, enter the section of a new approving in the “Section” or choose a necessary section from the lookup window.

New record

SAVE CANCEL ACTIONS

Section\*  
Orders

Column 'Owner'\*  
Owner

Is Active

Priority

- b) In the “Owner” field, select to whom the notification about the approval result will be sent – a record is approved or rejected.

Available types of owners for approving:

- Modified by
- Contact
- Owner
- Created by

In the page record profile, enter the owner for a new approving or choose an option from the lookup window in [Owner].

- c) The “E-mail for sending” field is used to indicate a mail address from which approving notifications will be sent.


By default, the value of the checkbox is ‘Active’.

- d) The “Priority” field is filled in automatically depending from the position of the approval priority.

### 1.3 Toolbar for approving page

The toolbar displays information about the name of the approving, email templates, number of approvers, approving period, approval priority and settings for returning record rights and repeating the approving when completed.

Name*	Approval of orders more than 5000 USD	1
Repeat sighting upon completion	<input type="checkbox"/>	2
Is needed to restore rights after successful approving	<input type="checkbox"/>	3
Number of approval owner		4
General time for approving, days		5

1. Enter the name of a new approving in [Name] in the page toolbar.
2. On the page action, there is a checkbox “Repeat sighting upon completion”. If the checkbox is unactive, the approval will not be launched until the user launches it manually by pressing the  button on the Approval tab of the record of the selected section. If the checkbox is activated, the approval will automatically start as soon as the record meets the conditions of the approval.
3. On the page toolbar, enable the “Return rights on successful approval” checkbox. By default, the rights to a record that is being approved are taken away from all users (remaining read-only access). Recording rights are returned in case the approving decision is negative. If the approving decision is positive, the recording rights will not be returned.

Activate the checkbox if you want the record access rights to be returned when the approval is positive.

4. The “Number of approval owners” field is filled in automatically when entering data about the approvers.
5. The “General time for approving, days” field is filled in automatically when entering data about the approvers.

#### 1.3.1 Priorities management panel

Approving priority management is set up in a separate view on the main page of the Approving section.



ADD ACTIONS

Filters/folders Tag

Visa setting	Priority	Created on	Modified on
-	-1	9/20/2022 1:49 PM	12/13/2022 1:08 PM
Account Approving	0	9/20/2022 1:49 PM	12/13/2022 1:08 PM
-	-1	7/8/2022 3:53 PM	12/13/2022 1:09 PM
Approval of orders over 1,000 USD	0	7/8/2022 3:53 PM	11/15/2022 4:58 PM
Invoice approving	1	9/14/2022 2:08 PM	12/13/2022 1:09 PM
Invoice approving (unpaid)	2	9/19/2022 10:27 AM	12/13/2022 1:09 PM
-	-1	9/20/2022 1:04 PM	12/13/2022 1:10 PM
New Contact approving	0	9/20/2022 1:04 PM	12/13/2022 1:10 PM
-	-1	7/5/2022 9:32 AM	12/13/2022 1:10 PM
Order < 10000	0	7/5/2022 9:32 AM	9/20/2022 1:48 PM
Order > 10000\$	1	8/16/2022 11:33 AM	11/23/2022 3:46 PM
Orders > 5000	2	11/23/2022 12:57 PM	12/13/2022 1:10 PM
Order confirmation	3	11/23/2022 3:09 PM	12/1/2022 11:34 AM
+	-1	7/5/2022 5:36 PM	8/16/2022 11:28 AM

The view displays a tree structure of objects for which approvals are created, as well as the approvals themselves within this object. One object can contain several different approvals. In this case, a situation may occur when the record meets the conditions of several approvals at the same time.

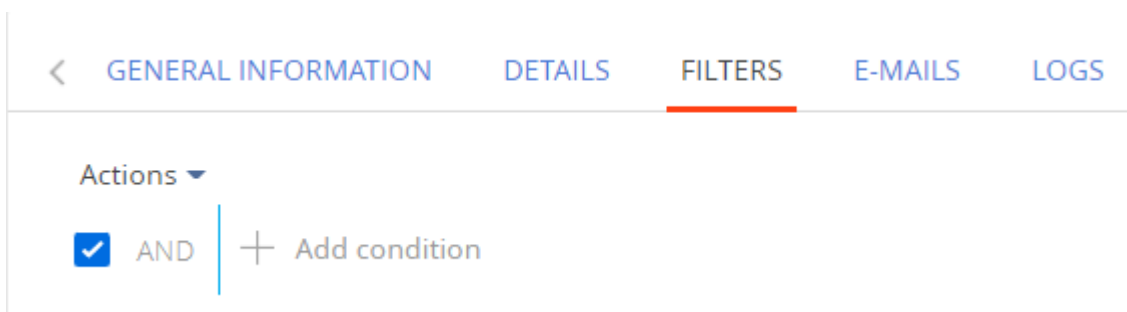


Arrange object approving in the required order using the buttons. The approval that is above will be launched first.

## 1.4 Filters tab

Designed to select the parameters by which the approval process will be launched. A filter can consist of several parameters and search conditions

In the page tab block on the Filters tab in the filter settings area, click the link “Add condition”



In the opened window, in the Column field, select the column that you need, for example, “Payment amount” and press “Select”.

Select column
✕

SELECT
CANCEL

+
Order

Column

Payment amount
▾

In the filter settings, set the necessary condition parameters:

<
GENERAL INFORMATION
DETAILS
FILTERS
E-MAILS
LOGS

Actions ▾

AND

Payment amount
>
5,000.00

+
Add condition

### 1.4.1 Columns comparison in filtering

The function is intended for cases when for the sighting condition it is necessary to specify not a constant value for an object column, but to compare the value of two object columns.

For example: You need to create an approval if the order amount is > 5000.00 and the payment amount is < Total.

<
GENERAL INFORMATION
DETAILS
FILTERS
E-MAILS
LOGS

Actions ▾

AND

Payment amount
>
5,000.00

AND

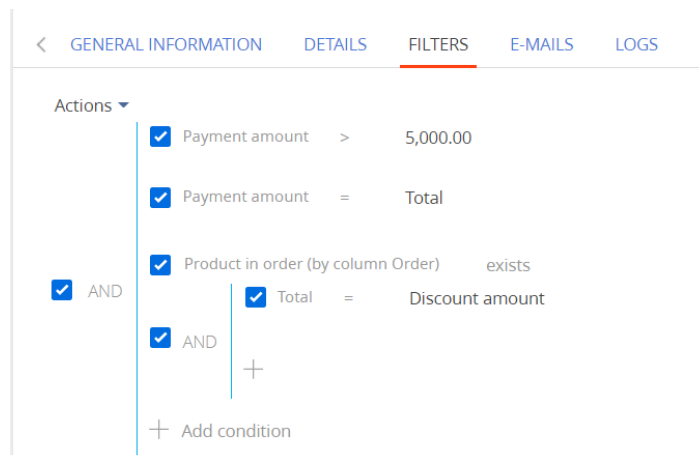
Payment amount
=
Total

+
Add condition

Compare with Value

Column value

Or it is necessary to add to the existing condition that “Total” for products in the order = “Discount amount”.



## 1.5 Approval owners tab

The “Approval owners’ tab is created for assigning approvers (employees, functional and organizational roles) and column values after the approving.

In the page tabs block on the General information tab, enter the following information:

- **Approval owners** after pressing +
- **Columns values after positive approving** after pressing +
- **Columns values after negative approving** after pressing +





### 1.5.1 Approval owners


This page indicates the approval purpose, the employees/roles (functional or organizational) who make the decision on approval, and the deadline for the decision on approval. It is possible to change the approval order, and notifications sending, a delegation of the decision on approval, redirect approval when the approval period expires, and set up connections with the object of approval.

The list of approval owners is displayed on the part in a tree view where approvers can be grouped. By default, the group is configured for parallel sighting. This means that the approval is triggered for all the approval owners in the group at the same time, and all the approval owners of the group must agree to

proceed to the next step. It is possible to add an approval owner, a group of owners, and add an owner to a group as well.

...	Owner	Delegation is allowed	Enough one approval owner	Parallel	Approval purpose
1	Stefan Snider	No	No	No	
2	Sam Davidson	No	No	No	

Note: use the   buttons to control the location of records in the tree view on the part. The position affects the ordinal number of the approver - the approval occurs from the first record to the last. The last entry is the final one

Press  in order to add a record.


< GENERAL INFORMATION DETAILS FILTERS E-MAILS LOGS >

...	Owner	Delegation is allowed	Enough one approval owner	Parallel	Approval purpose
1	Stefan Snider			No	
2	Sam Davidson	No	No	No	

Add group  
 Add approval owner  
 Add approval owner to group

### 1.5.1.1 Add group

In order to add a group press [Add group]

Group 1 What can I do for you? > 

SAVE CANCEL ACTIONS

---

Index Number 1 Enough one approval owner

In the opened fill in the following columns:

**Index number** – index number of a group. It is filled in automatically, depending on the position in the tree view on the Approving.

**Enough one approval owner** - Since by default, the group is set up for parallel approval, the approval is started for all the approval owners in the group at the same time, and all the approval owners of the group must agree to proceed to the next step.

If the checkbox is activated, then for approval it will be enough to receive the approval result from one of the owners in the group. As soon as one of the owners in the group approves the approval, the record will proceed to the next stage, while for the remaining owners of the group the approval will be canceled with the mark 'Agreed by other owners'.



Press **SAVE**

Note: approving conditions are displayed in a tree view in the columns [parallel] and [enough one approval owner]

Index Number	Owner	Enough one approval owner	Parallel
1	Leo Shelton	No	No
2	Wilfred Dixon	No	No
3	Administrator	No	No
4	Accounting Department	No	No

### 1.5.1.2 Add approval owner

On the **Approval owners** page on the toolbar, fill in the fields:

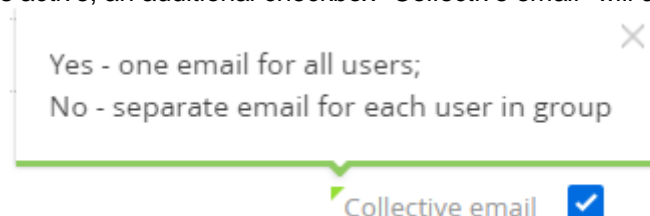
- **Index number** - Filled in automatically, depending on the position in the tree view on the [Approving].
- **General time for approving, days** - specify the number of days for approving.
- **Escalation** - an optional field, specify to whom the approval will be redirected upon the expiration of the approval period.
  - **Send E-mail** - activate the check-box to send a message about the approval. When the checkbox is activated, specify to whom the e-mail will be sent. **Send to all** – email will be sent to all approvers. **Choose recipient** - select the required recipient in the **Recipient** column that appears:

Approval of orders more than 5000 USD / Approval Owners What can I do for you? > **Creatio** 8.0.4.1870

**SAVE** CANCEL ACTIONS ▾

Index Number 3	Selection <input type="checkbox"/>
General time for approving, hours 0	Owner Administrator
Escalation	Delegation is allowed <input type="checkbox"/>
Approval purpose	
Send E-mail <input checked="" type="checkbox"/>	
<input checked="" type="radio"/> Send to all	Collective email <input checked="" type="checkbox"/>
<input type="radio"/> Choose recipient	

When the checkbox is active, an additional checkbox "Collective email" will appear with a hint:



If the check-box is enabled, one email will be sent to all recipients, if it is disabled, a separate e-mail will be sent to each recipient.

- **Approval purpose** – choose an approval purpose
- **Owner** – choose the owner of the approval by functional or organizational role, or choose a specific user
- **Delegation is allowed** – activate the check-box if it is necessary to delegate the approval decision to the approval owners

- **Selection** – allows you to form selections for the approval object. Detailed description in paragraph

And press **SAVE**

Finance department approving

Sales department approving

### 1.5.1.2.1 Selection

The system provides the ability to build selections for the object of approval. For example, an order may be approved not by a specific role, but by the person responsible in the account of this order. If the account has several orders with different approval owners, then all such orders will be approved by the approval owner in the account to which these orders are linked to.

When the **Selection** checkbox is activated, the following options become available on the record page:

Owner 2 What can I do for you? > **Creatio** 6.0.4.1670

**SAVE** CANCEL ACTIONS ▾

---

Index Number  Selection

General time for approving, hours  Owner

Escalation  Delegation is allowed

Approval purpose

Send E-mail

---

**Filters**

Actions ▾

AND | + Add condition

---

**Object setting**

Select role from previous step  Previous approval owner

**Filter setting**

Actions ▾

AND | + Add condition

**Connections with main object** + :

- **Choose role from a previous step** – the active check-box allows you to select an object from the previous sighting step. The disabled checkbox will install the object from the approval.
- **Previous approval owner** – specify the owner from one of the previous steps.
- **Filter setting** – the detail is designed to select the parameters by which the selection will be built. A filter can consist of several parameters and search conditions. In the filter settings area, click the <Add condition> link.

Select column ×

**SELECT** CANCEL

+ System administration object

Column

In the opened window, in the Column field, select the column of interest, and click Select

In the filter settings, set the required condition parameters.

- **Links with the main object** – the detail allows you to set the relations with the main object of approval. For example, in order for the order owner to be the person in charge in the account to which the orders are linked to, you need to set up a relation from the person in charge in the order account to the approval owner.

Click on **+** to add a relation. On the page that opens, fill in the fields:



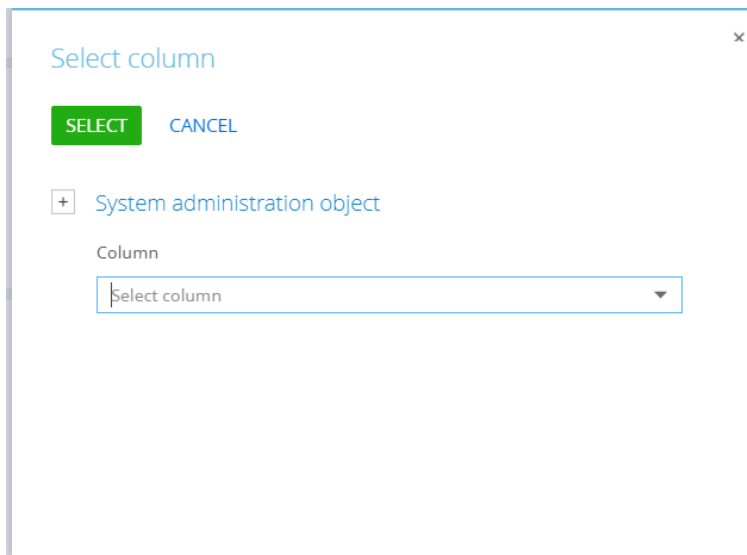
On the opened page, fill in the fields:

[Column heading of the main object] – specify the link path:

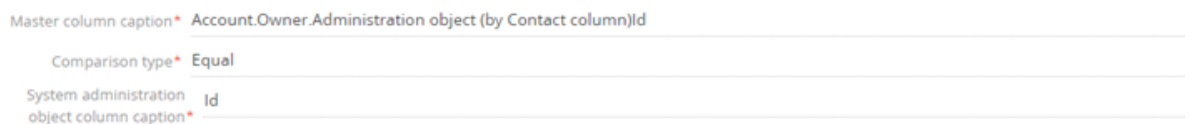


“Comparison type” – specify the type of comparison. Available options: Greater than, Greater than or equal to, Less than, Less than or equal to, Not equal to, Equal to.

“Administration object column caption” – specify the administration object column by which the connection will be configured.



The configured relation will look like this:



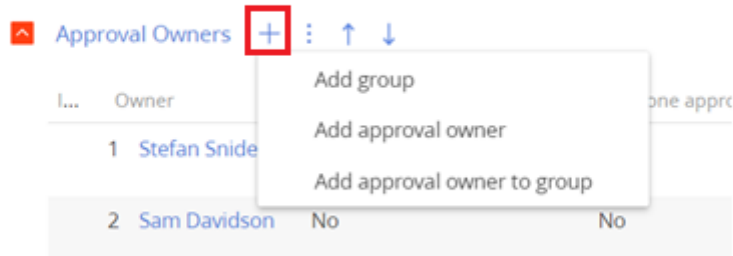
Thus, further orders will be approved by those approval owners in the account of each of the orders.



And press **SAVE**.

### 1.5.1.3 Add an approval owner to a group

Select the group you want to place the approval owner in. After that, the add owner to Group action will become available in the button menu.

Note: In order to add an owner to a group, a group must first be created.




Note: use the   to control the location of records in the tree view on the part. The position affects the ordinal number of the approval owner - the approval occurs from the first record to the last. The last entry is the final one.

...	Owner	Delegation is allowed	Enough one approval owner	Parallel	Approval purpose
1	Stefan Snider	No	No	No	
2	Sam Davidson	No	No	No	

### 1.5.1.4 Filtering by the approval owner

Besides a basic filter for setting an approval, if it is necessary, you can set up a filter for the owner. Thus, an approval for the owner will be created only in case the approval owner meets the conditions of the filter.

Approval of orders more than 5000 USD / Approval Owners What can I do for you? > 

SAVE CANCEL ACTIONS ▾

---

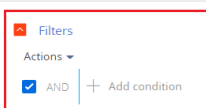
Index Number  Selection

General time for approving, hours  Owner\* Leo Shelton

Escalation Finance Delegation is allowed

Approval purpose Order approval

Send E-mail



Example: You have to send an order on the 'Confirmation' stage for Supervisor to approve, but if the sum of the order on the 'Confirmation' stage is more than 10000, you have to send it to the 'Finance' role for approval.

Approval Owners + : ↑ ↓

I...	Owner	Delegation is allowed	Enough one approval owner	Parallel	Approval purpose
1	Stefan Snider	No	No	No	
2	Sam Davidson	No	No	No	

According to this example, for the Supervisor, the filter will not be filled in, but the general settings filter will look like:

< GENERAL INFORMATION DETAILS **FILTERS** E-MAILS LOGS

Actions ▾

AND

Status = 2. Confirmation

+ Add condition

For the 'Finance' role the additional condition will be added:

Approval of orders more than 5000 USD / Approval Owners What can I do for you? > **Creatio** 8.0.4.1870

**SAVE** CANCEL ACTIONS ▾

Index Number 1 Selection

General time for approving, hours 0 **Owner\* Finance**

Escalation \_\_\_\_\_ Delegation is allowed

Approval purpose \_\_\_\_\_

Send E-mail

**Filters**

Actions ▾

Payment amount > 10,000.00

AND

+ Add condition

If the order sum is < 10000, the process will end after the Supervisor confirms or rejects the order.

## 1.5.2 Column values after positive approving

It serves to determine the state of the sighted object as a result of successful approval.

On the **Value of fields page**, after a successful approval on the toolbar, fill in the fields:

- Object field, for example, [Payment Status]
- Lookup column value, for example, [Paid in full]

And push the button



SAVE CANCEL ACTIONS ▾

Module\* Invoices  
ColumnValue Paid

Column Payment status

### 1.5.3 Column values after negative approving

Serves to determine the state of the sighted object as a result of negative approving

On the **Value of fields after a negative approving** page on the toolbar, fill in the fields:

- Object field, for example, [Payment Status]
- Lookup column value, for example, [Unpaid]

And push the button

SAVE

SAVE CANCEL ACTIONS ▾


Module\* Invoices  
ColumnValue Unpaid

Column Payment status

### 1.6 Details tab

The [DETAILS] tab is intended for specifying details that are prohibited from being changed during the approval process.

In the tab block of the page on the [DETAILS] Tab, enter the **Details for Approval** information after pressing the +. This detail displays only those details that are administered by records.

Note: Move the cursor over  next to the **Details for Approval** to display the tip.

&lt; GENERAL INFORMATION DETAILS FILTERS E-MAILS LOGS

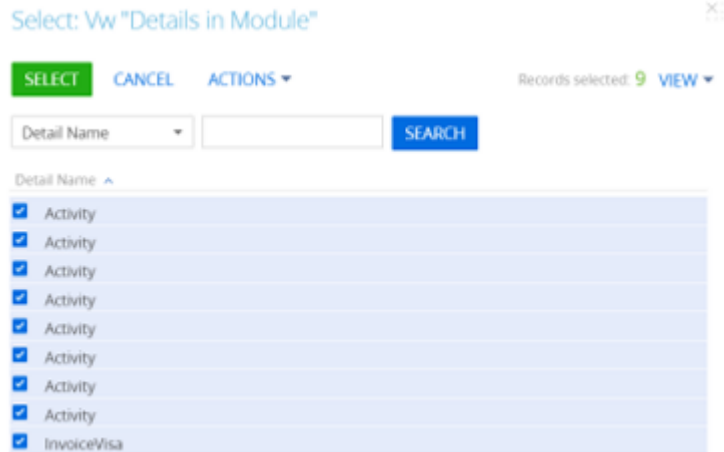
Details for approving +



You can select records which are administrated by records

No data

Select the details that will not change during the approving process and click the [Select] button. The system will block all selected details for editing for all users



## 1.7 Saving of the approving

To save the approval on the toolbar, click the

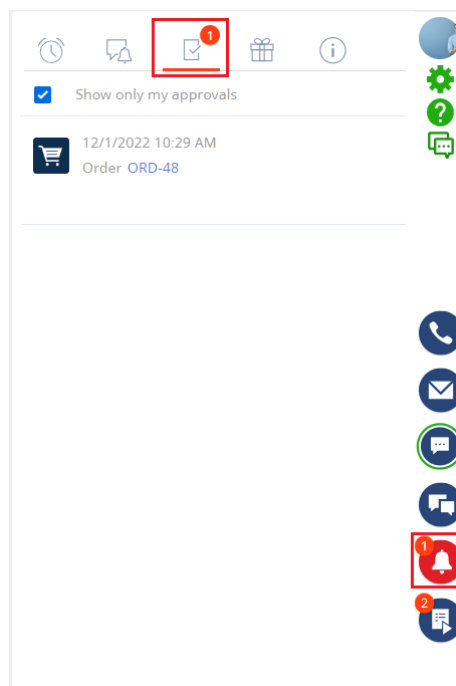
**SAVE**

*Note. Saving can be done after filling in the required fields.*



## 1.8 Work with approving

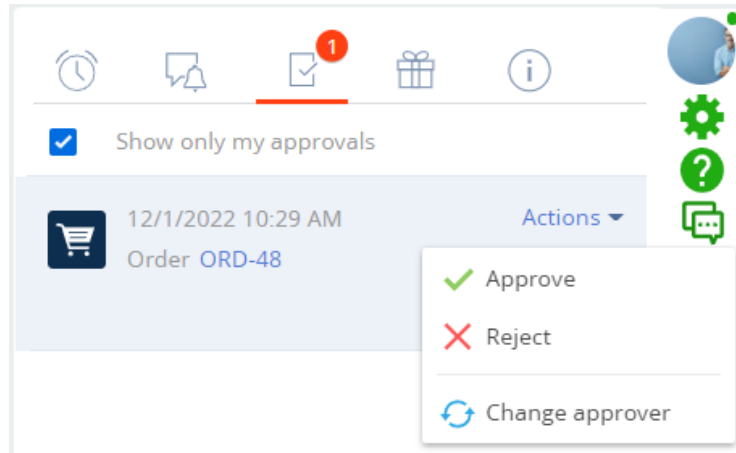
After starting the approval process according to the conditions specified in the approval setting, the participants in the process (specified on the “Approvers” detail) will receive a notification on the communication panel.





The user has two ways to select their decision:

1. On the communication panel on the block with notification by the "Action" button



The user can:

- Approve;
- Reject;
- Change the approver.

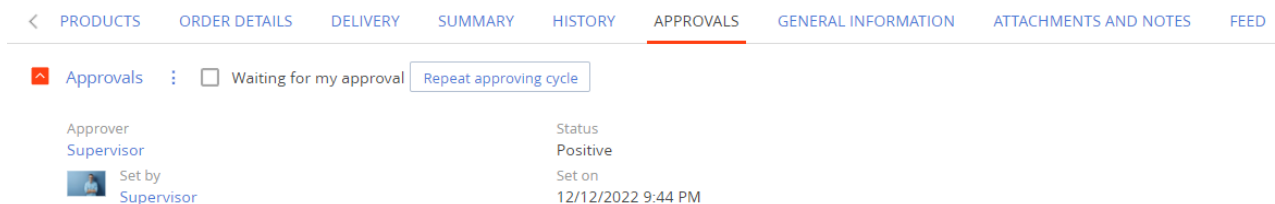
*Note: In case of a negative decision, the system will prompt you to enter a comment to accompany the negative decision. The comment will be displayed on the Approvals tab of the object being approved.*

---

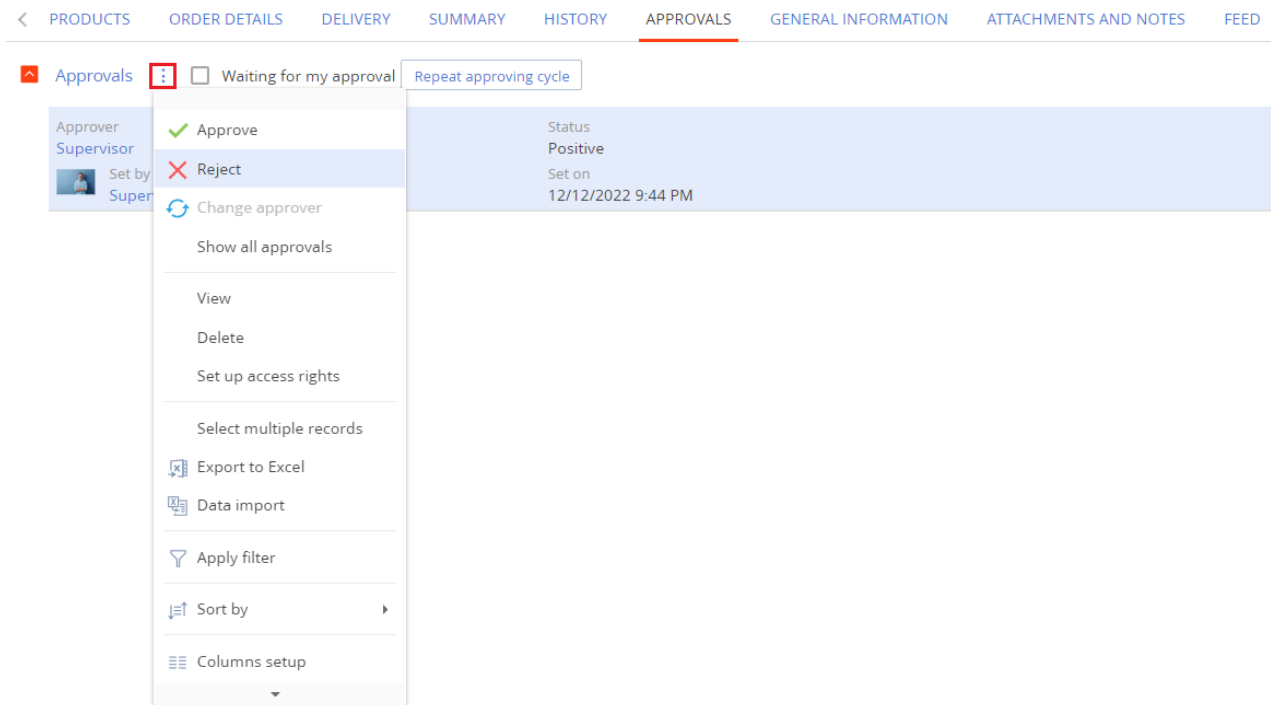
Are you sure you want to reject the approval?

Approval comment

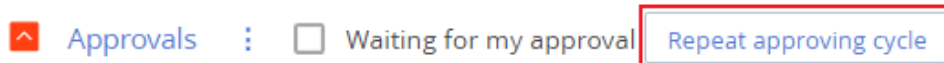
**REJECT** CANCEL



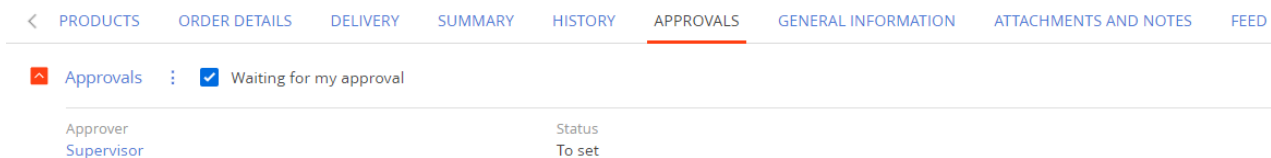
2. On the "Approvals" tab of the target object, by clicking on the details of the three-dot menu:



After the completion of the approval cycle, if necessary, restart the approval process, the user can use the button "Repeat approval" on the "Approvals" detail.



Moreover, on the "Approvals" detail, the checkbox "Waiting for my approval" is available to the user, when activated, only approvals available to the user in the "Waiting for approval" state will be filtered.



## 2. Opening, coping and deleting in the registry

In the Approving section in the registry of section records, when you select an activity, you can open, create a copy, or delete a record.

Approving

ADD ACTIONS

Filters/folders Tag

Name	Is Active
Order confirmation	Yes
Orders > 5000	No
New Contact approving	No
Invoice approving	No
Invoice approving (unpaid)	No
Order < 10000	No
Approval of orders over 1.000 USD	No
Contracts - Draft status	No

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