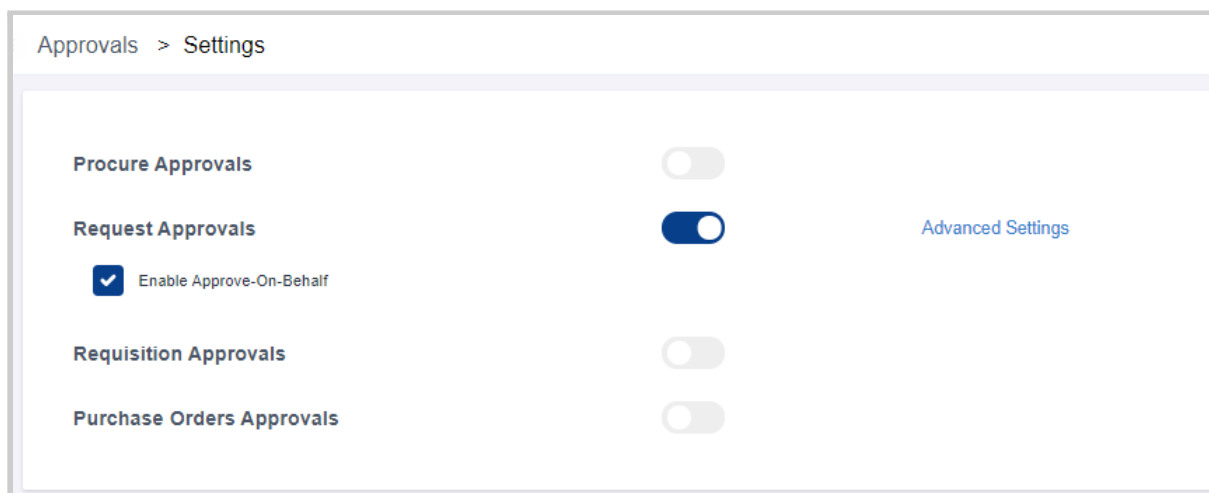# APPROVALS

Activating Approvals

Step 1: Under Approval, click on Settings
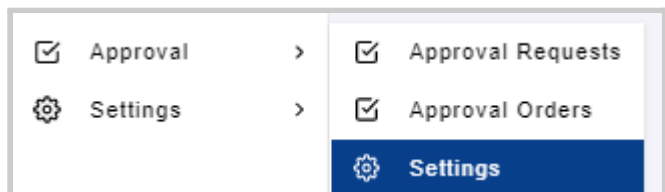
Step 2: Toggle to activate an approval module

The approval Module can be activated for each of the following four modules - depending if your organisation uses them:

1. Request Forms
2. Requisition Forms
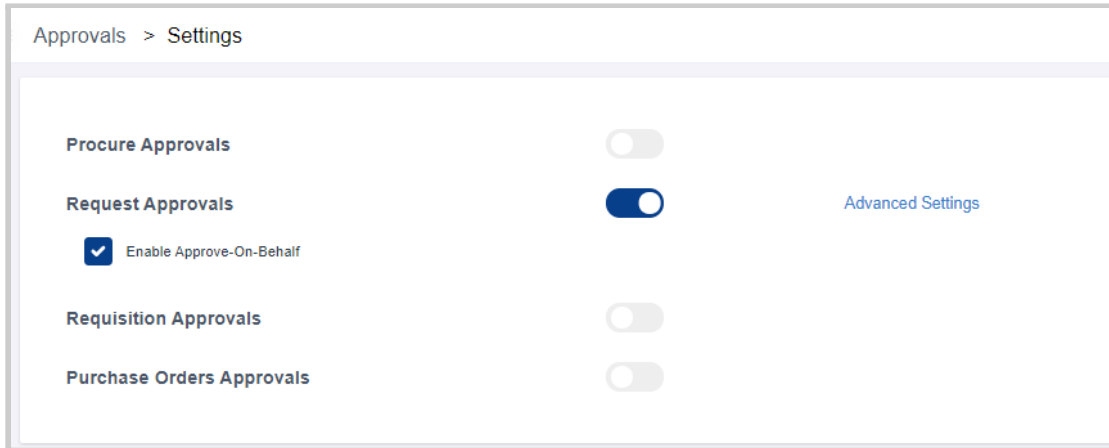3. Purchase Order Forms
4. Procure Orders

FEATURE: For each module, you have the option to allow the Admin to approve on behalf of any approver. (e.g. when an approver is on holiday, the Admin can approve the submission instead)

Setting up Flow

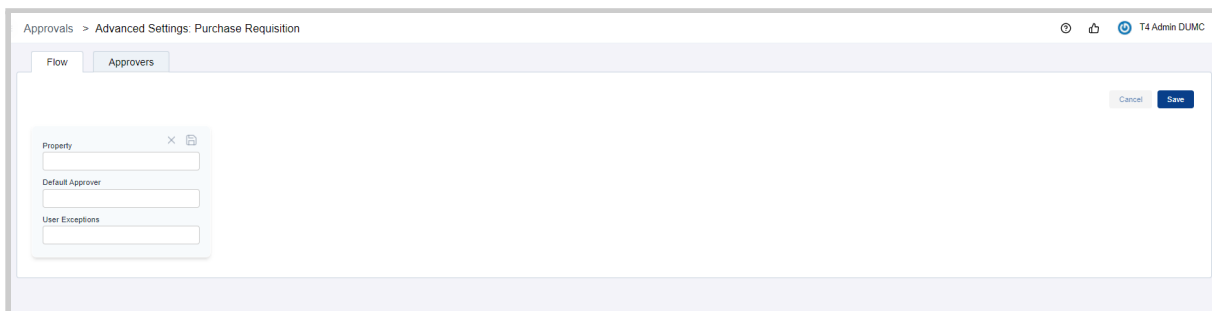This section explains how you can set up the approval flow for all activated modules.

Step 1: At the relevant activated Module, click on Advanced Settings

This will bring you to a page to set up your approvers and approval flow.

Step 2: Setting up the flow by adding Properties
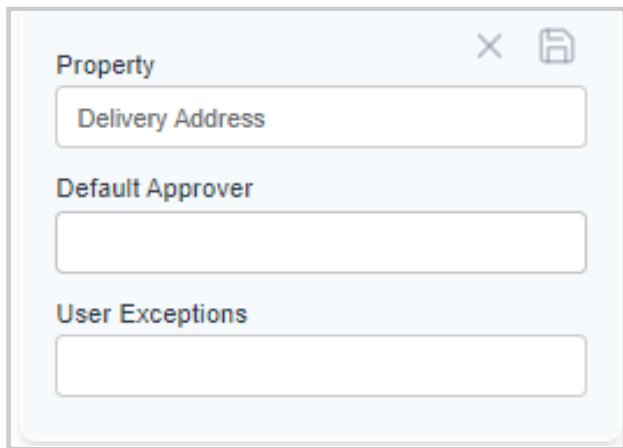
At the Flow Tab, click on the 'Property' field to select your first Property for Approval.

Properties available for selection are:

- Department
- Delivery Address
- Billing Address
- Project Code
- Category
- Form Type (coming soon)

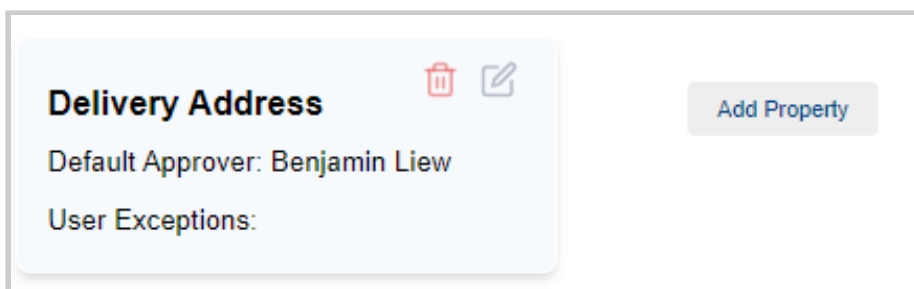When a property is added, you will need to define the following:

- **Default Approver**
  - For all submissions that are not assigned to any approver, the request will be sent to the Default approver.

- **User Exceptions**
  - These are users that will not go through the approval logic of this property during submission.

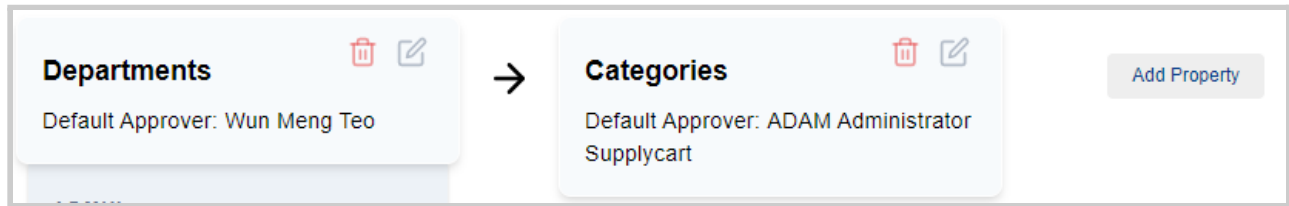Click the 'Save' icon to add this Property into the Approval Flow.

If there are new properties to be added, click on 'Add Property' to add the next new property into the approval flow.
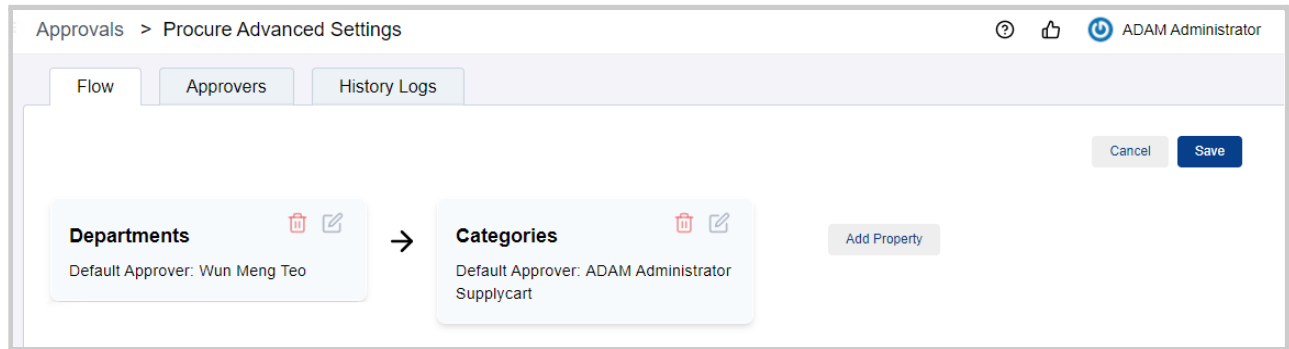
Note: *You can only add a property once in a flow*

If your organisation approval policy requires more logic, repeat the setup steps above for setting up of your next new property.

Final Step: Save Approval Flow logic

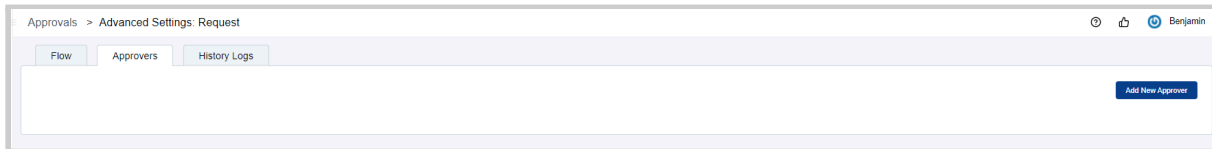Click on 'Save' to complete the setup of the Approval Flow.

Note: Approval flows will move from the first property to the next subsequent property.

Setting up Approvers

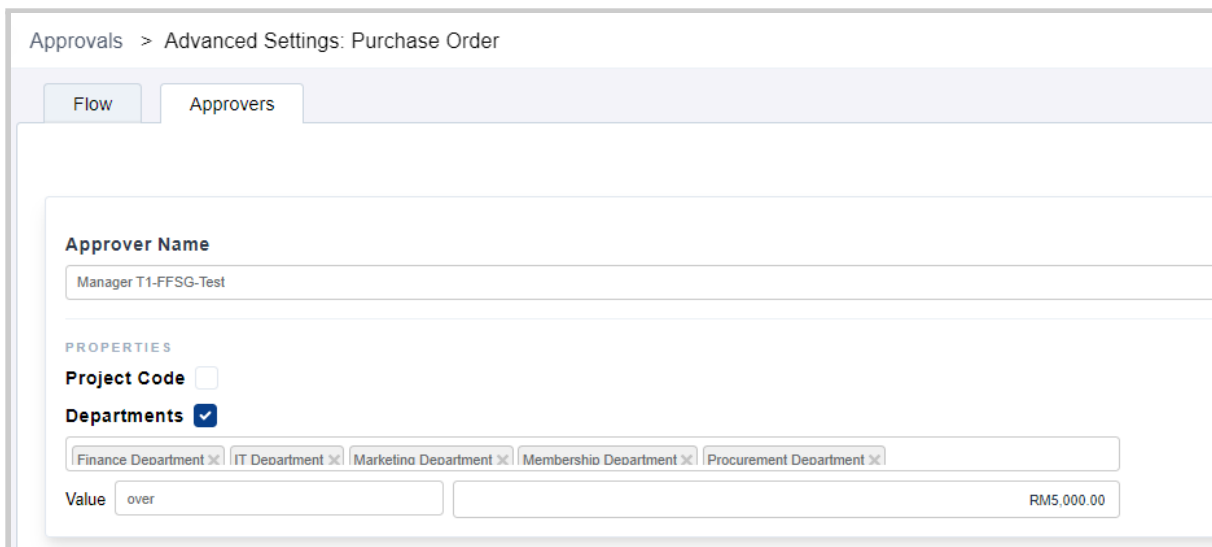This section explains how to set up each individual approver as part of the flow.

Step 1: Click on 'Approvers'

This tab will list out all approvers for this approval flow:

Step 2: Setting up Approver Properties

Click on 'Add New Approver'

- Select the approver's name by searching in the 'Approver Name' field

- Assign Properties related to the approver by ticking the checkbox;

- For a selected property, select all Property Values relevant to the approver.

Note: Property Values are maintained as part of your company setup. (e.g. all your different delivery addresses)

Step 3: Setting up Property Value Operators (Up to/Within/Above/Any)

- If the approver is required to approve all requests (irrespective of values), select **ANY**

  Note: Once the first approver is setup for ANY, all subsequent approvers in the same property will only be able to setup for ANY

- If the approver is required to only approve requests that are limited by a value range, set up the relevant Value Operator

  Note: For Value Operators, this must be reflected in the relevant module's setup

  - **Up to:** An Approver is assigned a Maximum value that they are able to approve for. Any value above, will be sent to the next level of approvers

  - **Within:** An Approver is assigned a range that they are able to approve for. Any value smaller than the minimum will not impact the approver, and any value greater than the maximum will be sent to the next level of approvers

  - **Above:** An Approver is assigned a value where all values greater than it will be sent for this Approver's action. (i.e. any submission below the value will not require this approver's action)

- Examples of the usage of the Value Limit Operators are as below:-
  - Approver 1 is to approve all Requisitions Up To RM 1,000
  - Approver 2 is to approve all Requisitions Within RM 1,000.00 to RM 10,000
  - Approver 3 is to approver all Requisitions Above RM 10,000
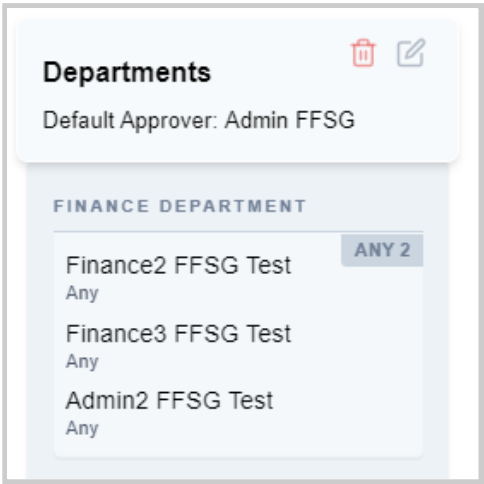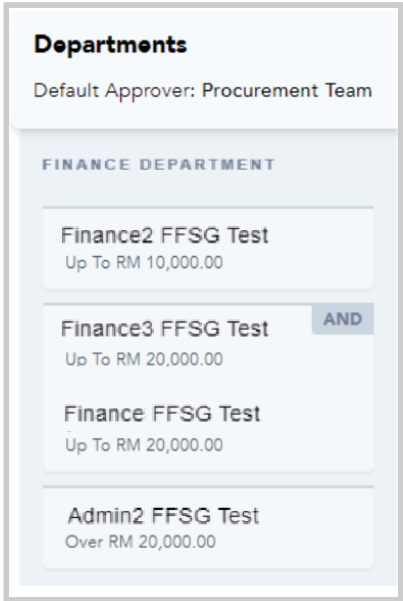
Final Step : Save approver setup

- Click on 'Save Approver' to add the approver into the flow

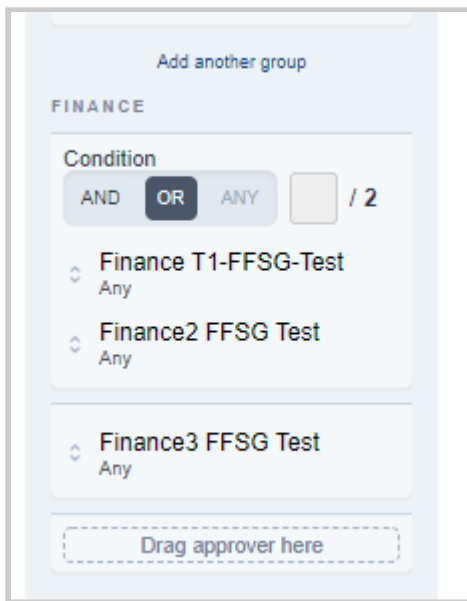- Repeat this process until all required approvers have been setup
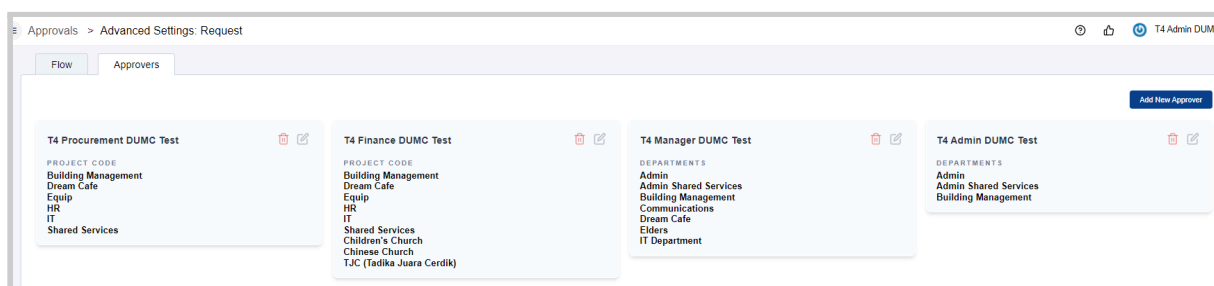
Finalising the Flow setup

This section will explain how to configure the flow, once multiple approvers have been setup within the same Property.

Approvers will be automatically grouped together if they have the same Property Value Operators.

No Value (ANY)	Value (Up To/Within/Over)
SETTING UP FIRST GROUP	
Approvers are automatically grouped when they share the same Property Value	Approvers are automatically grouped when they share the same Property Value
SETUP GROUPS FOR APPROVAL SEQUENCE	
Sequence can be amended by creating a new Group:- 1. Click on 'Create a new group' 2. Drag approvers into the new group 3. Drag groups to rearrange approval sequence	Sequence is automatically determined, by the value logic and does not need to be adjusted. • UP TO > OVER • UP TO > WITHIN > OVER • UP TO > WITHIN > WITHIN > OVER

Use of Operators within a Group (2+ approvers)

For any group, you are required to setup the operators, before the submission can continue in the approval flow:
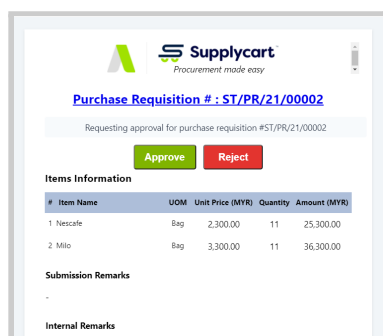
1) **AND**: When ALL approvers are required to approve

2) **OR**: When either one approver is required to approve (this is only available if there are 2 approvers in the group)

3) **ANY** : When any of a [defined number] of approver is required to approve (this is only available if there are 3+ approvers in the group)

Approving Requests:

Once the Approval settings have been activated, all future submissions will be subject to the approval process that has been set. Approvers will have two options to approve, either via email, or via ADAM.

Option 1: Approve or Reject via Email

Step 1: Review the details on the email
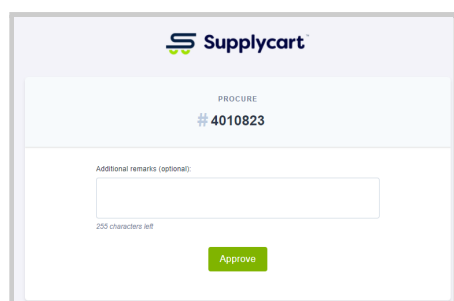
Step 2a: To approve a Submission, click 'Approve'

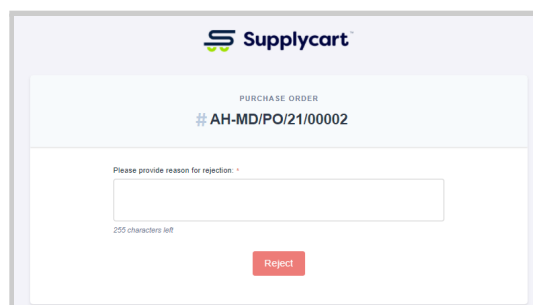This will redirect you to a page to approve the submission. Click on 'Approve' to confirm approval of the Submission
Note: You may also input any comments at this page.

Step 2b: To reject this Request , click 'Reject'
This will redirect you to a page to input the reason for rejecting the requisition. Once this has been done, you may click 'Reject' to complete the rejection.
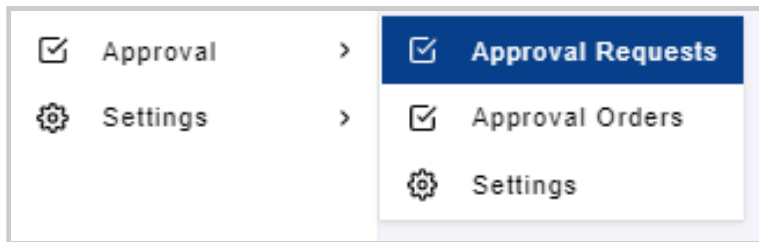
Option 2: Approve or Reject via ADAM
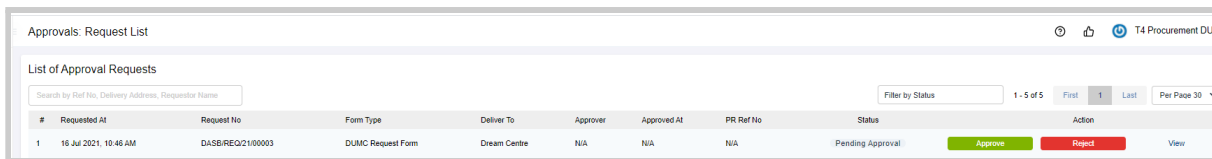
Step 1: Select the type of Approval from ADAM

Under Approvals, click on the relevant submission type to approve
Note: The display on this page will be based on the Approval Modules that have been activated

Step 2: Approve or Reject directly from the Approval List page

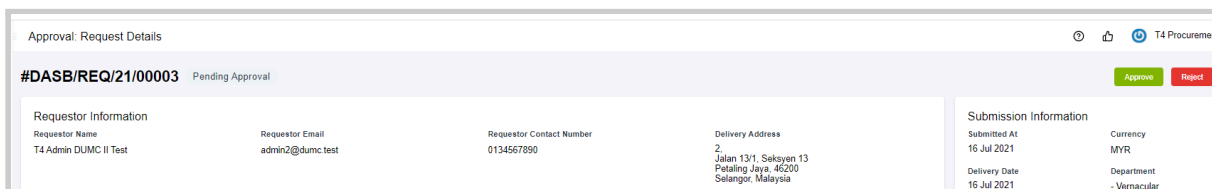Or click 'View' to review the details of the individual request.

Final Step: Review from within the Submission Details page

See all details that have been input by the user

Click 'Approve' or 'Reject'
Note: For Rejections, you must input a reason for rejecting the requisition. Once this has been done, you may proceed to complete the rejection.

Reminding Approvers

For requests that have yet to be approved, you may remind the Approver by clicking on the 'Remind Approver' button on the top right corner of the Submission.

This will resend the approval email to the approver for their action
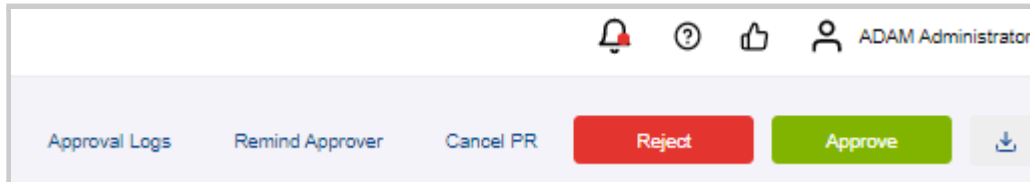
Note: A User is only allowed to remind the approvers once a day.