

Approval

[Approval] process element

Version 7.17



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PRODUCTS: ALL CREATIO PRODUCTS

Use the [*Approval*] element to:

- Set up the process of adding a new approval in Creatio and identifying the approver.
- Enable or disable an option to delegate the approval to another user or group of users.
- Set up notifications for approval participants about the approval process and its results.

On the [*Approval*] element's execution:

- A new approval record is created. All approval information, such as the approver, approval result, comments, etc. is displayed on the [*Approvals*] tab of the record that was submitted for approval. More information about the [*Approvals*] tab is available in the [Work with approvals](#) article.
- The first email notification is sent at the moment the approval record is created.
- After the approver approves or denies the approval, another email notification is sent to the employee specified in the [*Recipient*] field under the [*Notify about the approval result*] checkbox.

Specify the approval parameters in the element setup area (Fig. 1).

Fig. 1 The [*Approval*] element properties

Approval

Approval purpose

Approval required

Approval section

Orders

Record Id*

[#Read order.First item of resulting collectio...

Approver

Role

Role

[#Lookup.Roles (view).Accounting Departme...

Approval may be delegated

Send email notification ⓘ

Notify that approval is required

Email template

[#Lookup.Email message template.Orde...

Notify about the approval result

Recipient

[#Read order.First item of resulting collectio...

Email template

[#Lookup.Email message template.Orde...

Ignore errors on sending

Run following elements in the background

1. Specify the case element purpose by typing in a header at the top right-part of the element setup area. This will make the element more recognizable on the case diagram.
2. [*Approval purpose*] - default purpose is "Approval required". The approval purpose will be displayed in the [*Approval objective*] field on the [*Approvals*] tab. You can edit the value in the [*Approval purpose*] field directly or map it using the [parameter value menu](#).
3. [*Approval object*] - a Creatio object whose record is being approved. This is a required field.


Note. The list contains only objects in which approvals have been enabled. More information about the [*Approvals*] setup is available in the [Work with approvals](#) article.

4. [*Record Id*] - the record being approved. You can map this parameter using the [parameter value menu](#). This is a required field.
5. [*Approver*] - specify the approver user. The approver can be a specific employee, manager of a specific employee, or any employee who is a member of a Creatio organizational or functional role.
 - If you select “Employee”, specify the Creatio user who is the approver in the [*Employee*] field.
 - If you select “Employee's manager”, specify Creatio user whose direct superior is the approver. Direct superior is specified in the [*Manager*] profile of the employee's record in the [*Employees*] section.

Note. If the employee's manager cannot be found, the approval will still be created, but the [*Approver*] field in it will be empty. In this case, a system administrator user can use the [*Change approver*] command in the actions menu of the [*Approvals*] detail to assign an approver.

Note. When configuring the [*Employee*] or [*Employee's manager*] fields, you can either specify a dynamic value or set a fixed value using the [parameter value menu](#).

- [*Roles*] - select an approver's role. In this case, any employee who belongs to the selected role will be able to set this approval.
6. [*Approval may be delegated*] - select the checkbox to allow the approver to forward the approval to another employee.
 7. In the [*Send email notification*] area, set up sending of email notifications for the employee who created the approval and the approver.



Attention. Set up the mailbox for email notifications in the [*Mailbox for sending email with information on approval*] system setting. Access the system setting in the Process Designer by clicking the  button in the [*Send email notification*] area.

Note. Create email templates in the content designer, for the corresponding object. For example, to set up notifications for document approvals, create a template using the [*Approvals in section Document*] object. The approval objects are created automatically when you select the [*Enable approval in section*] checkbox in the section wizard. If the lookup of the [*Enable approval in section*] does not contain the template you need, click [+](#) in the right part of the field to add a new email template.

8. Select the [*Notify that approval is required*] checkbox to notify the approver. As a result, the approver user will be notified whenever a record is submitted for approval. If you select “Role” in the [*Approver*] field, all members of the corresponding role will receive a notification.
 - [*Email template*] - select a notification email template from the [*Email templates*] lookup.
9. Select the [*Notify about the approval result*] checkbox to notify the employee about the result of the approval.

- [*Recipient*] - specify who will receive the notification (either an email address, a contact, or an account). You can edit the value in the [*Recipient*] field directly or map it using the [parameter value menu](#). Usually, the recipient, in this case, is mapped to the [*Owner*] field of the record submitted for approval.
- [*Email template*] - select a notification email template from the [*Email templates*] lookup.

10.[*Ignore errors on sending*] - select the checkbox to send an email despite email-related errors. If there was an issue with sending an email, the business process will also end with an error. For outgoing flows:

- Use conditional flows  if the process must branch, depending on the approval result.
- Use sequence flow  if the approval result does not affect the process flow.

Click the corresponding flow to select it. Learn more about flows in the “[Business process flows and connecting objects](#)” article.