Creatio Academy

Approval

[Approval] case element

Version 7.17

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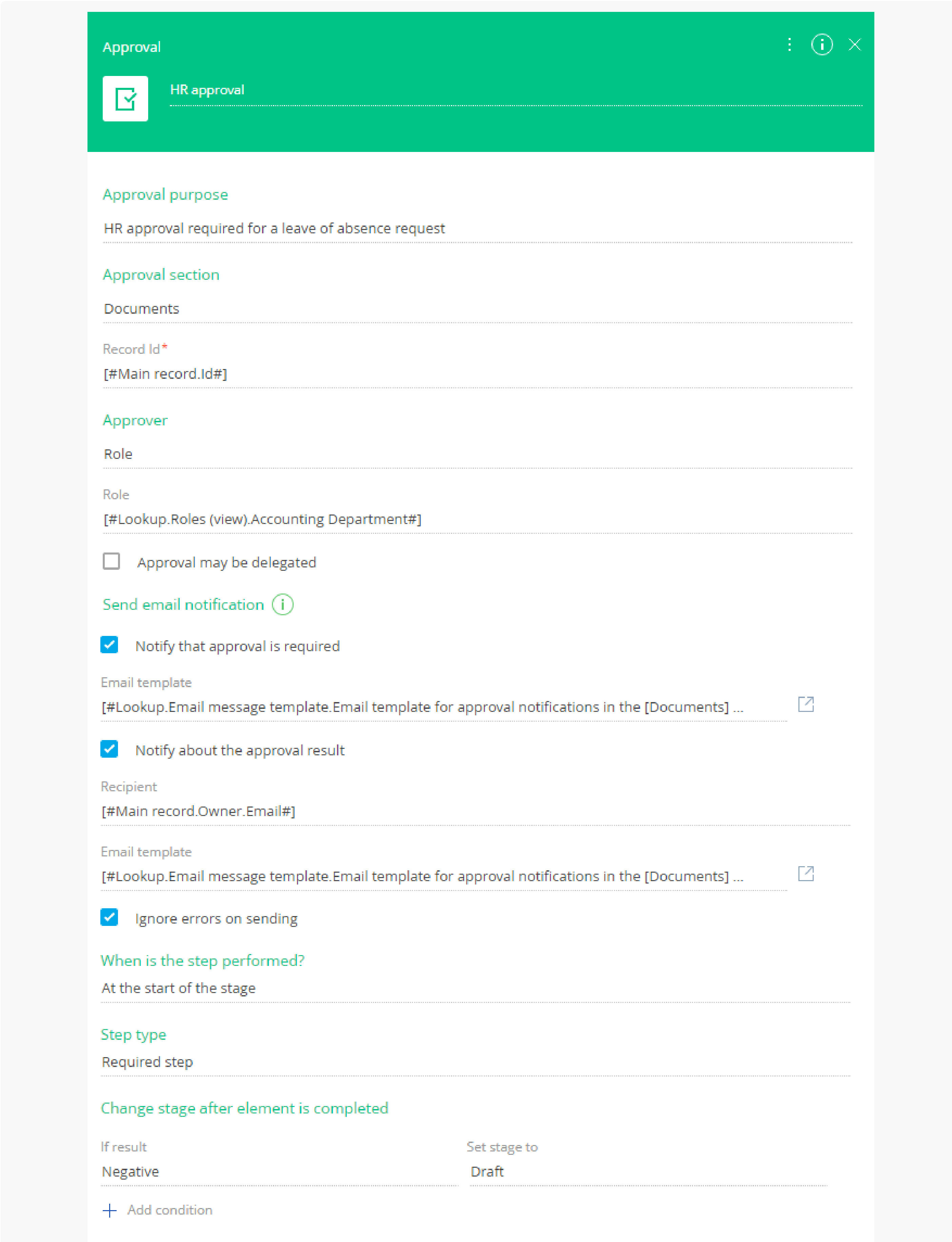
[Approval] case element

PRODUCTS: ALL CREATIO PRODUCTS

The [*Approval*] case element ( ) is used for creating approvals, as well as for setting up approval-related notifications.

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

Fig. 1 The [*Approval*] element properties


Approval
HR approval
Approval purpose
HR approval required for a leave of absence request
Approval section
Documents
Record Id*
[#Main record.Id#]
Approver
Role
Role
[#Lookup.Roles (view).Accounting Department#]
Approval may be delegated
Send email notification
Notify that approval is required
Email template
[#Lookup.Email message template.Email template for approval notifications in the [Documents] ...
Notify about the approval result
Recipient
[#Main record.Owner.Email#]
Email template
[#Lookup.Email message template.Email template for approval notifications in the [Documents] ...
Ignore errors on sending
When is the step performed?
At the start of the stage
Step type
Required step
Change stage after element is completed
If result
Negative
Set stage to
Draft
Add condition

Set up an object to approve

Fill out the following fields:

1. [*Approval purpose*] – default purpose is “Approval required.” The approval purpose is displayed on the [*Approvals*] detail of the record being approved.
2. [*Approval section*] – the records of this section will be submitted for approval.

    > **Note.** The dropdown list contains sections where approval is enabled. Learn more: [Work with approvals](#).

3. [*Record Id*] – the record approved. This is a required field.

Set up the approver

Fill out the following fields:

1. [*Approver*] – select one of the options and fill out a field that opens:
    - “User” – specify the approver in the [*Employee*] field.
    - “Employee’s manager” – specify the employee whose manager will be assigned as the approver in the [*Employee*] field. Creatio will submit the approval to the contact specified in the [*Manager*] profile on the employee page.

        > **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.

    - “Roles” – specify the role the users with which can approve the record in the [*Role*] field.
2. [*Approval may be delegated*] – select the checkbox to allow the approver to forward the approval to another employee.

Set up the approval notifications

Set up sending of email notifications for the employee who created the approval and the approver in the [*Send email notification*] area.

> **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 a 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. Learn more: Create an email template.

1. 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.
2. [*Email template*] – select a notification email template from the [*Email templates*] lookup.
3. Select the [*Notify about the approval result*] checkbox to notify the employee about the result of the approval.
4. [*Recipient*] – specify who will receive the email notification: an email address, a contact, or an account. You can enter the value in the [*Recipient*] field directly or map it using the parameter value menu. For example, map the recipient to the [*Owner*] field of the record submitted for approval.
5. [*Email template*] – select a notification email template from the [*Email templates*] lookup.
6. [*Ignore errors on sending*] – select the checkbox to continue the case regardless of notification sending errors. Otherwise the case will end with an error should a sending error occur.
7. [*When is the step performed?*] – indicates whether to activate element at the start of the stage or after a case step. By default, the step is performed at the start of the stage. Select "After the previous step is complete" if the [*Approval*] element must start after the previous step in the case stage. Specify the step in the [*Perform after step*] field.

    Note. Users can advance to the final "unsuccessful" stage from any stage without completing the required steps.

8. [*Step type*] – specify if the step is required. Select "Required step" if the task must be completed to transition to the next stage. If the approval is not required to perform to transition to the next stage, select "Optional step."
9. [*Change stage after element is completed*] – click [*Add condition*] and set up transitions based on the approval results.
10. Select one of the available approval results in the [*If result*] column and specify the next stage in the [*Set stage to*] the column.

What happens when the [Approval] element is activated

- 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. Learn more about the [*Approvals*] tab: Work with approvals.
- The first email notification is sent to the approver user or role when 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.