

Set up approvals

Set up an approval case

Version 7.17



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Set up an approval case

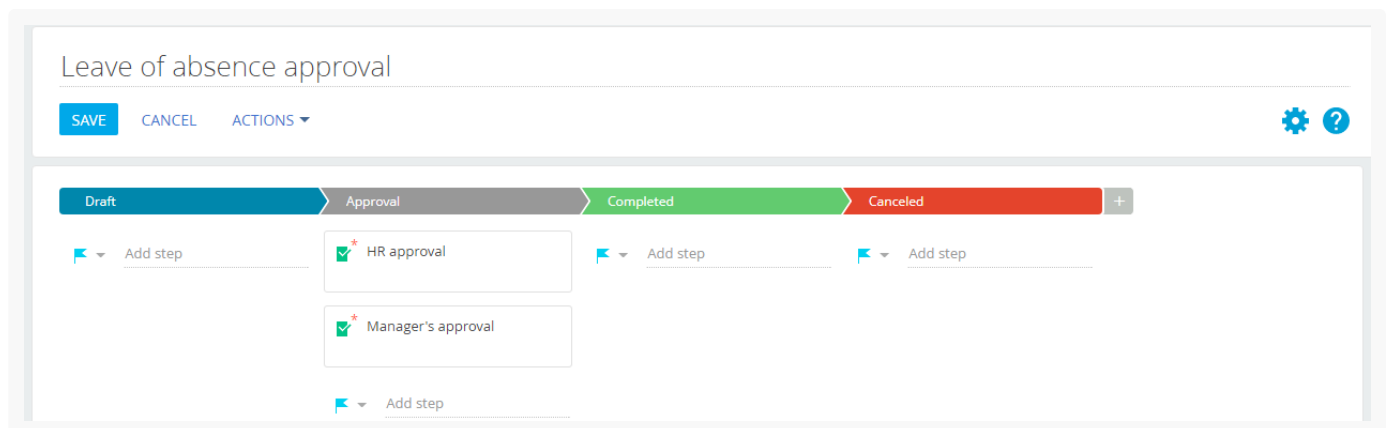
PRODUCTS: ALL CREATIO PRODUCTS

This chapter covers a step-by-step procedure of setting up a typical approval case: a leave request in the [*Documents*] section.

1. Each record with the “Approval” type is submitted for approval automatically, right after a new record is saved.
2. First, an HR employee must approve the request.
3. Once approved by the HR, the request is submitted for approval by the corresponding department manager.
4. Approvers will receive email notifications that a new record awaits their approval. The employees who submit requests for approval will receive email notifications about approval results.
5. If the approval has been denied by HR, the case transitions to the [*Preparation*] stage, at which the employee must revise the request. If the approval has been denied by the department manager, the case transitions to the [*Canceled*] stage.
6. If the request is approved by the department manager, the case transitions to the [*Completed*] stage.
7. The [*Completed*] and [*Canceled*] stages are final.
Set up the approval case as shown in [Fig. 1](#).

Attention. Please note that the example below refers to a custom case. Not all fields and values used are available in the base Creatio configuration. You can set up additional section fields in the [Section wizard](#). Before creating and configuring an approval business process, make sure that the [*Enable approval in section*] checkbox is selected for that section in the section wizard. [Read more>>>](#)

Fig. 1 - Case for leave request approval



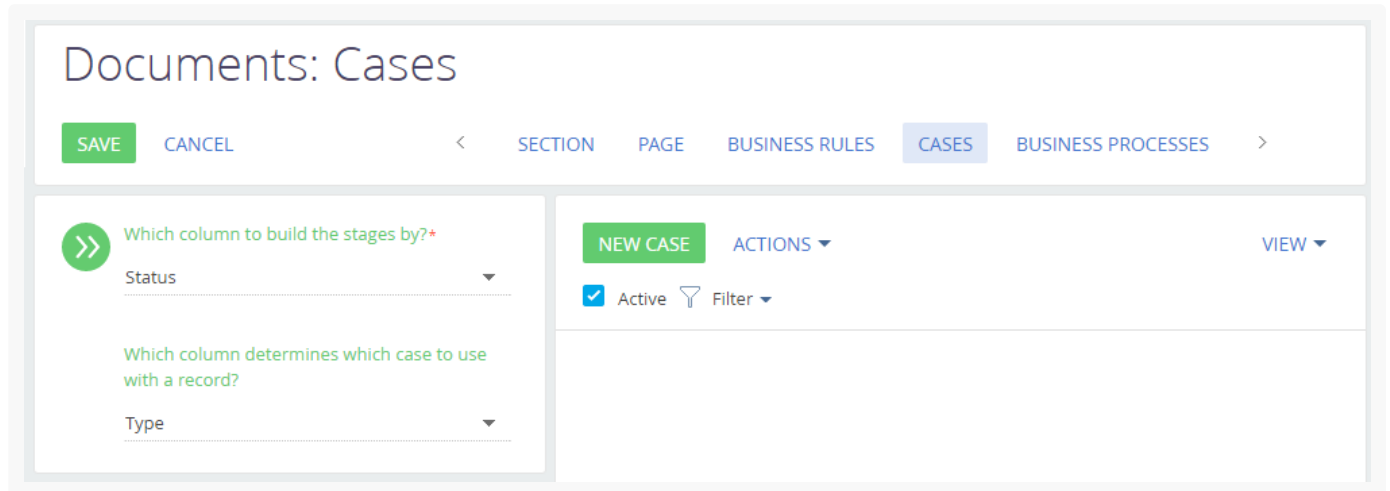
Set up the leave request approval case

1. Click Click [*View*] → [*Set up section cases*] in the [*Documents*] section. The Case Designer will open ([Fig. 2](#)).
2. In the case list, select “Status” in the [*Which column to build the stages by?*] field. As a result, the case

stages will be defined by the document status.

3. Select “Type” in the [*Which column determines which case to use with a record?*] field. As a result, the case will apply only to documents of a specific type (i.e., “Request”).



Fig. 2 Case list of the [*Documents*] section



4. Click the [*New case*] button to open the Case Designer. Here you will need to set up:
 - Case parameters.
 - Case sequence.
 - Activities on each case stage.

Set up case parameters.

The case parameters are set up in the case setup area ([Fig. 3](#)).

1. Click  to open case properties.
2. Specify the case title (i.e., “Request processing”).
3. Optionally, populate the [*Description*] field with additional information for anyone who may edit this case.
4. In the [*Use this case with records where:*] area, click  and select “Request.” As a result, the case will apply to all documents of the “Request” type.

Attention. Please note that the example below refers to a custom case. Not all fields and values used are available in the base Creatio configuration. You can add document types to the [*Document types*] lookup. Learn more about working with lookups in the “[Manage lookup values](#)” article.

5. The [*Section*], [*Stage column*], [*Code*], [*Package*], [*Active*], and [*Actual version*] fields will be populated automatically.

Fig. 3 Case setup area

The screenshot shows a configuration window titled 'Case' with a close button (X) and an information icon (i). The main title is 'Leave of absence approval'. Below the title bar, there are several configuration fields:

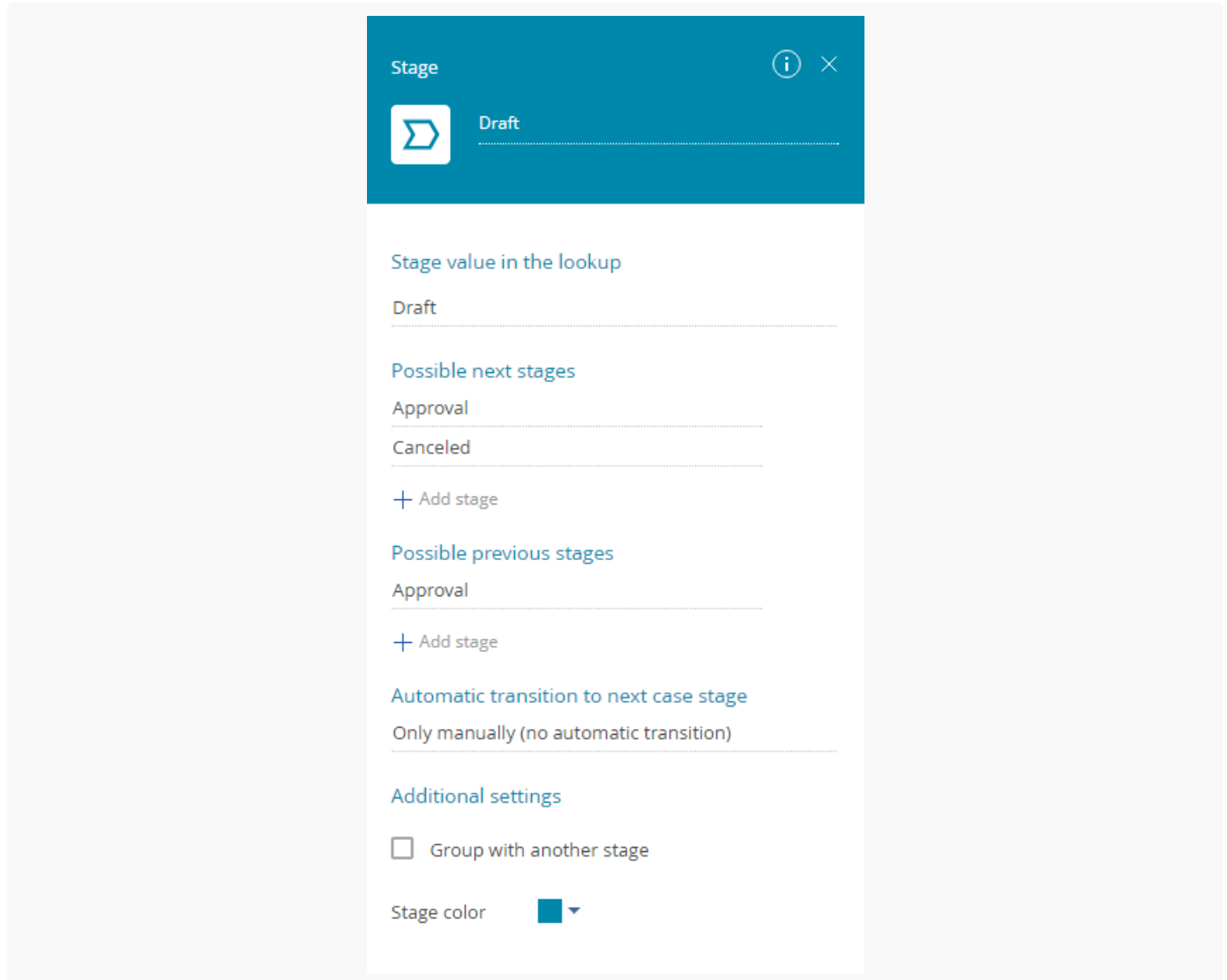
- Section***: Document
- Stage column***: Status
- Description**: This case handles requests for leave of absence
- Code***: UsrCase1
- Use this case with records where:***:
 - Type = Request
- Other properties**:
 - Package***: Custom
 - Active
 - Actual version

Set up case stages

Use the stages panel to set up the case workflow. The leave request approval case will have 5 stages that correspond to the values in the [*Status*] field in the [*Documents*] section. Use the **+** button to add case stages: [*Draft*], [*Approval*], [*Completed*], [*Canceled*], and [*Archive*]. Set up stage properties and steps to complete at each stage. We will use the first stage as an example.

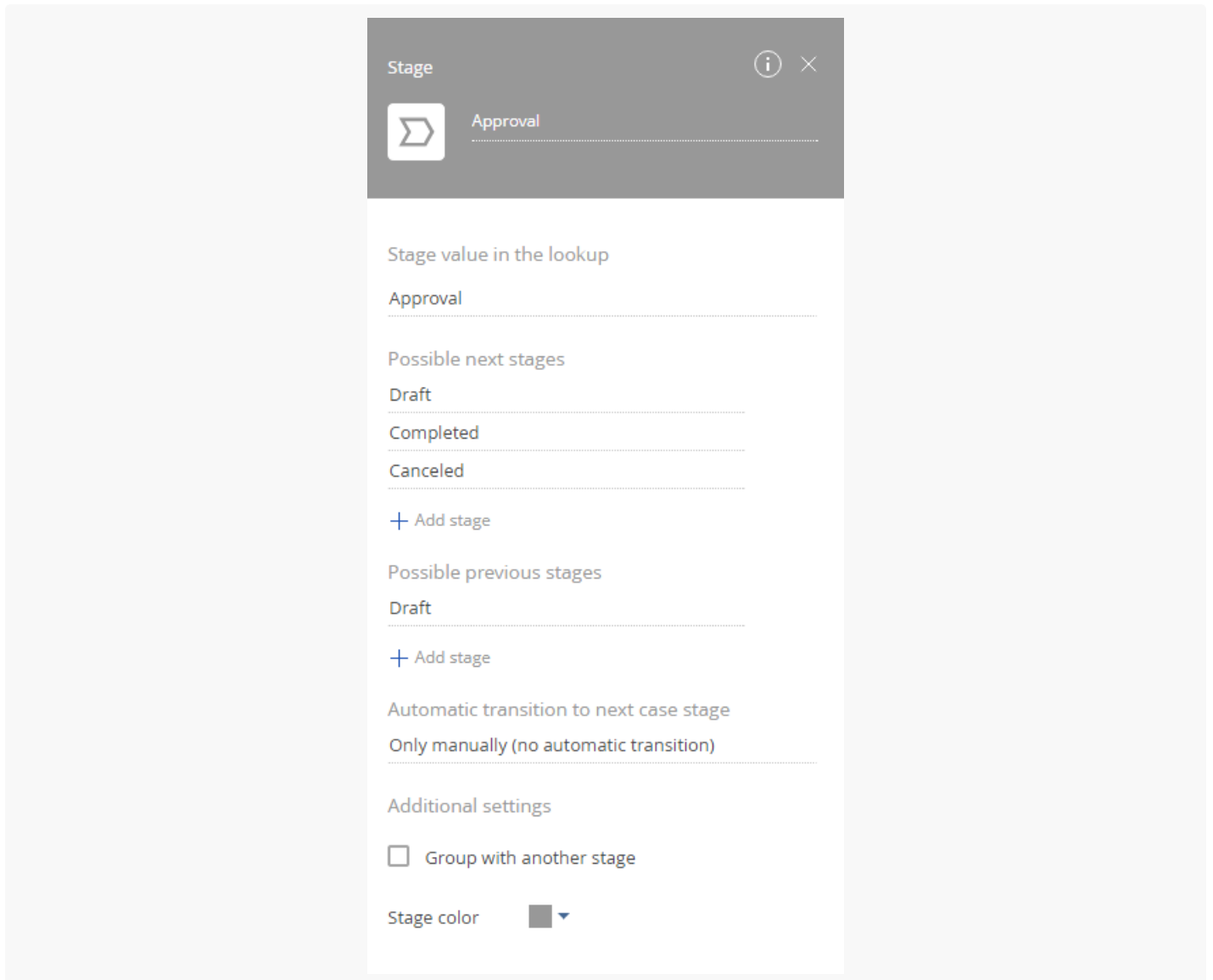
1. Click the first stage to open its setup area ([Fig. 4](#)).
2. Enter the name of the stage.
3. Select the corresponding document stage in the [*Stage value in the lookup*] ▾ field. You can add document stages directly from the Case Designer by typing in the new stage name. Make sure to save the case each time you add a new lookup value this way.
4. All other case stages will be automatically added to the [*Possible next stages*] area. Remove all stages from the list, except for the [*Approval*] and [*Canceled*] stages.
5. All other case stages will be automatically added to the [*Possible previous stages*] area. Remove all stages, except for [*Approval*] from the list. If the approval is denied, the case will transition back to the [*Draft*] stage.
6. In the [*Automatic transition to the next case stage*] field, select “If required steps are completed.”

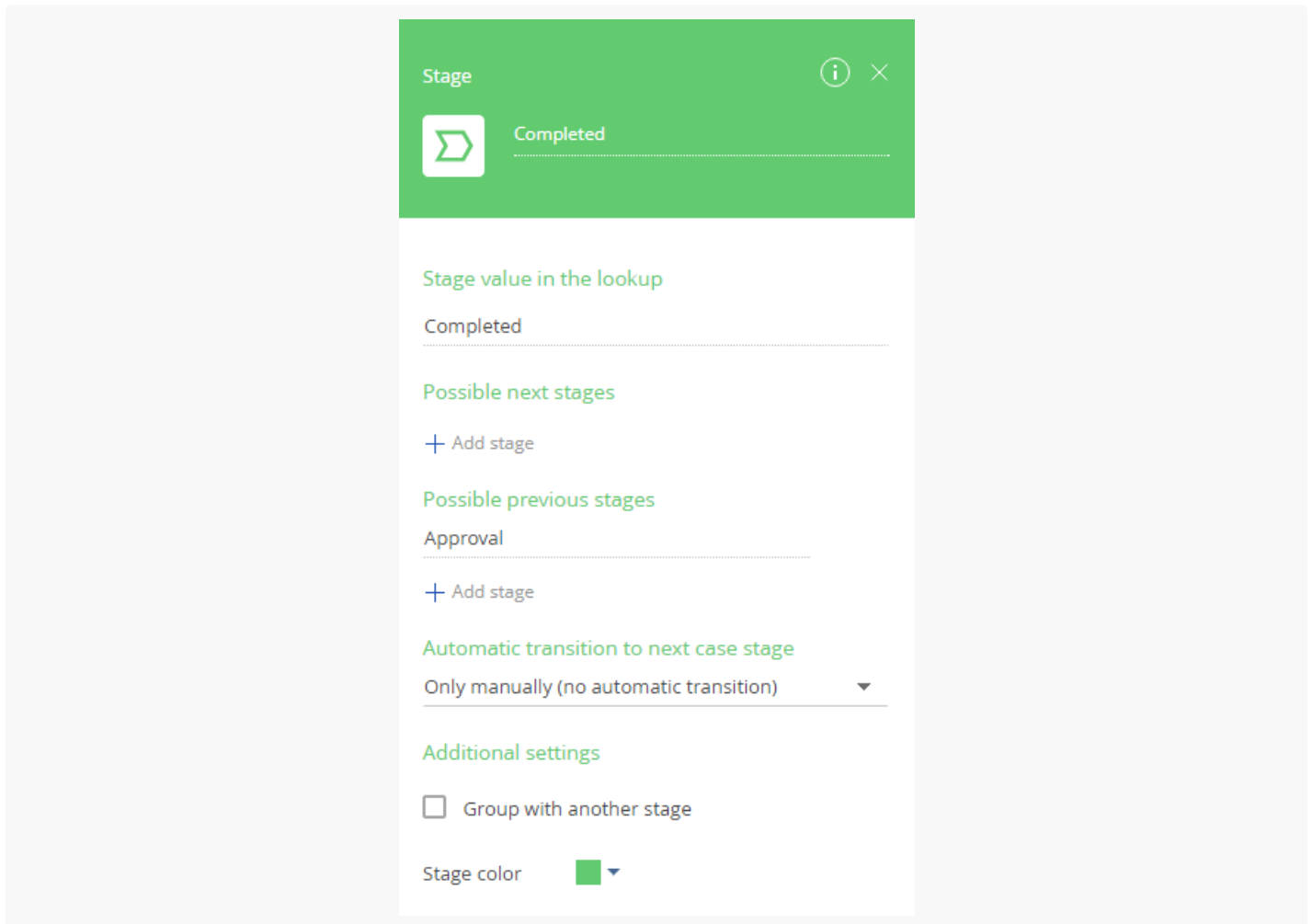
7. In the [*Additional settings*] area, select a color for this stage.
8. Leave the [*Group with another stage*] checkbox cleared. Grouped stages will display as one for the case user. Clicking a grouped stage will open a menu with all stages in the group. Note that this checkbox must be selected for the [*Canceled*] stage, which must be grouped with the [*Completed*] stage.

Fig. 4 The [*Draft*] stage parameters

Set up other stage properties in a similar way: “Approval” ([Fig. 5](#)), “Completed” ([Fig. 6](#)), “Canceled” ([Fig. 7](#)), and “Archive” ([Fig. 8](#)).

Fig. 5 The [*Approval*] stage parameters

Fig. 6 The [*Completed*] stage parameters



Note. The [*Completed*] and [*Canceled*] stages are mutually exclusive and are therefore grouped. The grouping is configured in the properties of the [*Canceled*] stage. In the setup area of the [*Completed*] stage, a ⓘ icon is displayed next to the [*Group with another stage*] checkbox. If you hover the cursor over the icon, a tooltip will appear, indicating that the stage is already grouped.

Fig. 7 The [*Canceled*] stage parameters

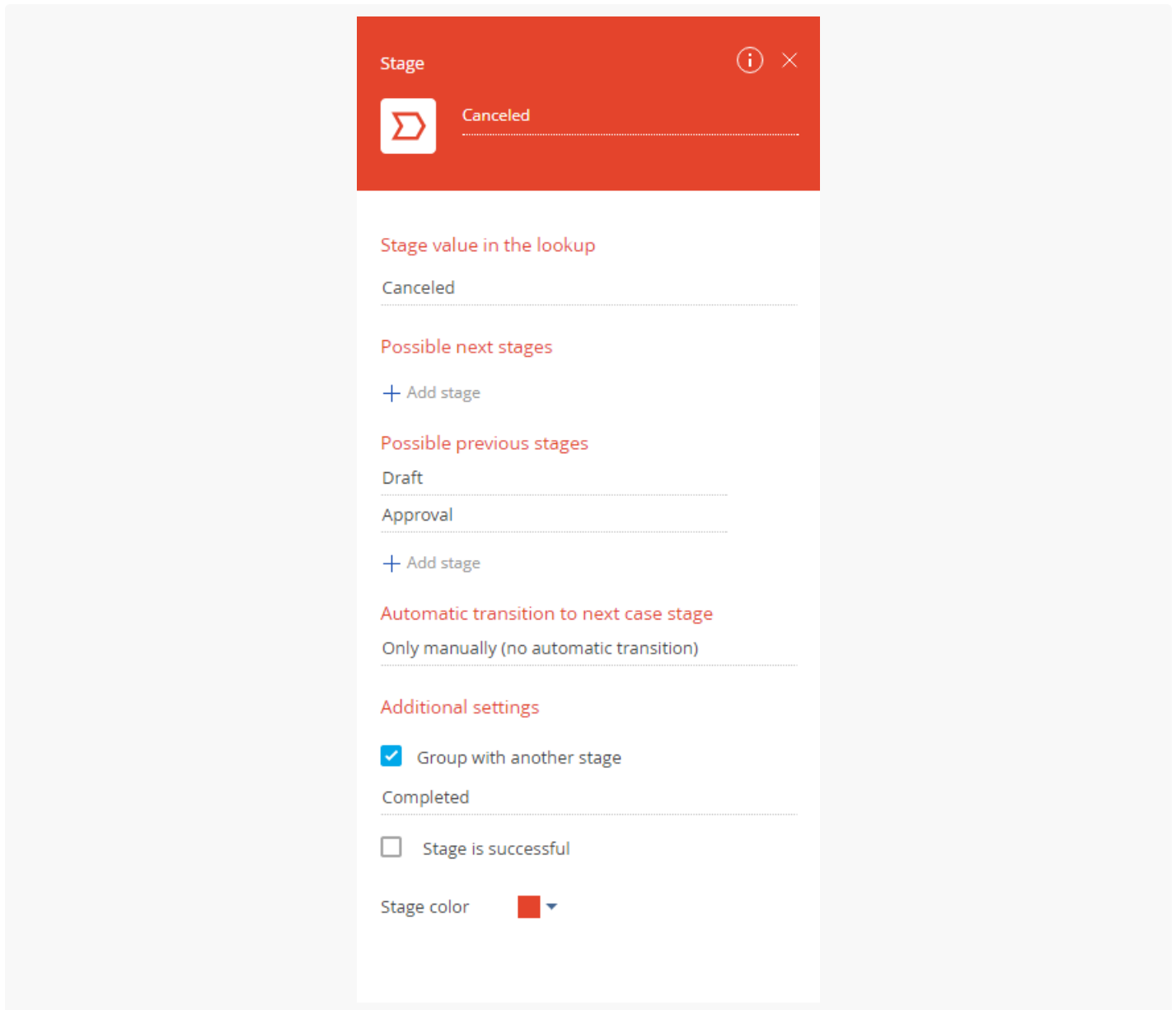
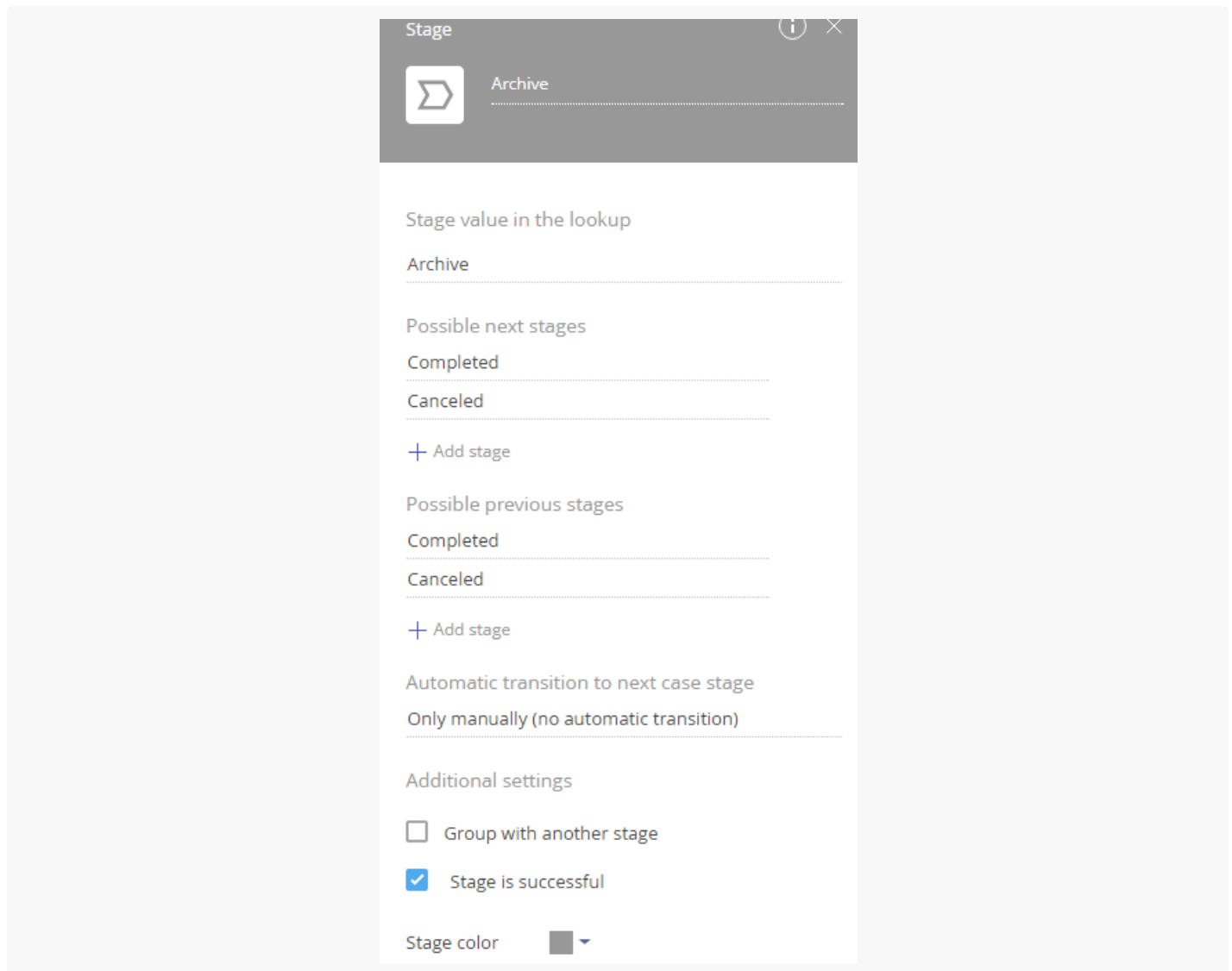





Fig. 8 The [Archive] stage parameters



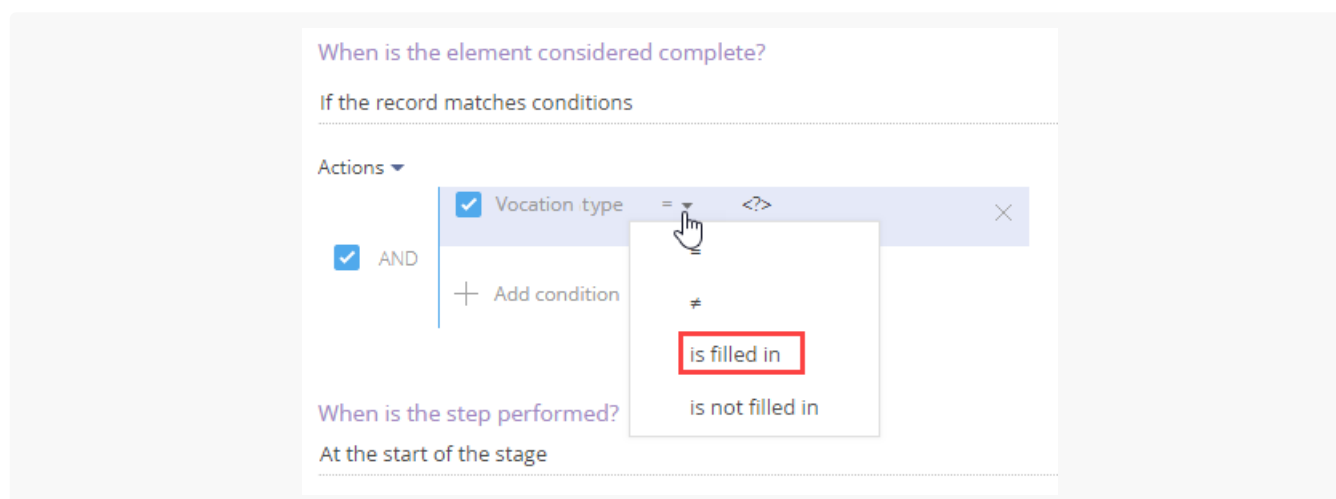
Set up case stage steps

Set up the steps of the [*Draft*] stage. To do this:

1. Click  below the [*Draft*] stage in the Case Designer working area. Select the [*Open edit page*] element. As a result, the document page will open on the [*Draft*] stage.
2. Enter the name of the new case element and press Enter. Click the added element to view its setup area.
3. In the [*Which page to open?*] field, select "Document."
4. In the [*Editing mode*] field, select "Edit existing record." [*Record Id*] field will display below.
5. In the [*Record Id*] field, click  and select "Main record column." Choose the [*Id*] column. As a result, the case will open the document record for which the case instance is run.
6. In the [*Who fills in the page?*] field, the current user contact is specified by default. Click  to change this value, if needed.
7. In the [*Recommendation for filling in the page*] field, list the actions that the user must perform on the opened document page, such as "Specify type of leave and exact dates." This text will be displayed on the new document page.

8. In the [*Hint for user*] field, enter additional information for the user. For example, you can use this field to specify the maximum number of available vacation days or add a reminder to adjust the vacation with the head of the department before filling in the request.
9. [*When is the element considered complete?*] - you can optionally select “If the record matches conditions” to consider the case element complete when the record matches required conditions (certain fields are filled, etc.).
10. Otherwise, leave “Immediately after saving the record” in the [*When is the element considered complete?*] field ([Fig. 9](#)). To do this:
 - a. Click the [*Add condition*] button and select the [*Vocation type*] column as required.
 - b. Select the [*Number of vacation days*] column as required.

Fig. 9 Setting up filter conditions



11. The “At the start of the stage” value will be displayed by default in the [*When is the step performed?*] field. After the case transition to the [*Draft*] stage, the task for filling the application will be created. The task will be displayed on the application page which is processed by the case.
12. In the [*Step type*] field, specify the step as required.
As a result, the settings for the case element will look like this ([Fig. 10](#)):

Fig. 10 Properties of the “Fill application” element

Open edit page
⋮ ⓘ ✕

Fill application

Which page to open?

Document

Editing mode*

Edit existing record

Record ID*

[#Main record.Id#]

Who fills in the page?

[#System variable.Current user contact#]

Recommendation for filling in the page*

Fill application (vocation type, number of days)

Hint for user

When is the element considered complete?

If the record matches conditions

Actions ▾

Vocation type is filled in

AND Number of days is filled in

+ Add condition

When is the step performed?

At the start of the stage

Required step

Required step ▾

Set up the sequence of stages

Set up the steps of the [*Approval*] stage.

1. Add a new [*Approval*] case element on the Case Designer working area. Enter the name of the new case element (i.e., “HR approval”) and press Enter. Populate the case element parameters.
2. In the [*When is the step performed?*] field the “At the start of the stage” value will be displayed by default.
3. In the [*Step type*] field, specify the step as required.
4. The “Approval required” value will automatically display In the [*Approval purpose*] field. If needed, modify the value in the [*Approval purpose*] field.
5. The value in the [*Approval section*] field should be “Documents” (the section, for which the case is being set up). This will be set by default if approvals are enabled in the [*Documents*] section.

Note. If you cannot find the [*Document*] object in the list, the approval procedure might be disabled for the [*Documents*] section in the Section wizard. More information about approvals is available in the [“Set up approvals in a section”](#) article.

6. The [*Record Id*] field will be set to the record for which the case is run.
7. In the [*Approver*] field, select “Role.”
8. In the [*Role*] field, select the “Lookup value” option and choose the value that corresponds to the HR department from the “Roles (view)” lookup. All employees in the selected role will be able to process this approval.
9. In the [*Send email notification*] area, configure automatic email notifications for the approvers and the document owner.
 - a. Select the [*Notify that approval is required*] checkbox.
 - b. In the [*Email template*] field, click ⚡ and select an email template from the [*Email message template*] lookup.
 - c. Select the [*Notify about the approval result*] checkbox.
 - d. In the [*Recipient*] field, click the ⚡ button and select the “Main record column” option. In the opened [*Select column*] window, click [+] and select the [*Owner*] column. In the appeared [*Column*] field, select the [*Email*] column of the document owner’s contact record and click [*Select*]. The value in the [*Recipient*] field should now be “[#Main record.Owner.Email#].”
 - e. In the [*Email template*] field, click ⚡ and select an email template from the [*Email message template*] lookup.

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, using the [*Approvals in the Documents section*] object. The approval objects are created automatically when you select the [*Enable approval in section*] checkbox in the section wizard. For example, if you select the [*Enable approval in section*] checkbox in the [*Documents*] section wizard, a new object “Approvals in section Document” will be created. 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 about creating an

email template in the [“Create an email template”](#) article.

10. Select the [*Ignore errors on sending*] checkbox.

11. In the [*Change stage after element is completed*] area, set the following condition: [*If result*] - “Negative”; [*Set stage to*] - “Draft.”

Note. There is no need to set stage transition for a positive approval result in this case, as the case will need to proceed to the next step within the same stage.

As a result, the settings for the case element will look like this ([Fig. 11](#)):

Fig. 11 - “HR approval” case element setup area

Approval
⋮ ⓘ ✕

☑
HR approval

Approval purpose
HR approval required for a leave of absence re...

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 t... 🔗

Notify about the approval result

Recipient
[#Main record.Owner.Email#]

Email template
[#Lookup.Email message template.Email t... 🔗

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	Set stage to
Negative	Draft

12. Add another [*Approval*] element to the [*Approval*] stage. Enter the name of the new case element (i.e., “Manager’s approval”) and press Enter. The properties of this case element will be the same as the ones of

the “HR approval” element, except for the values in the [*When is the step performed?*], [*Approver*] and [*Change stage after element is completed*] properties.

- In the [*When is the step performed?*] field, select “After the previous step is complete.”
- In the [*Perform after step*] field, select “HR approval” (if the “HR approval” is the only preceding element, it will be selected by default).
- In the [*Approver*] field, select “Employee's manager.”
- In the [*Employee*] field, click ⚡ and select “Main record column.” In the opened window, select the needed column of the Creatio object, specified in the [*Macro source*] field. As a result, whoever is specified as the manager of the employee submitting a leave request, will have to approve it.

Attention. Please note that not all mentioned objects, fields, and values may be available by default in your Creatio configuration. You can set up additional section fields in the [Section wizard](#).


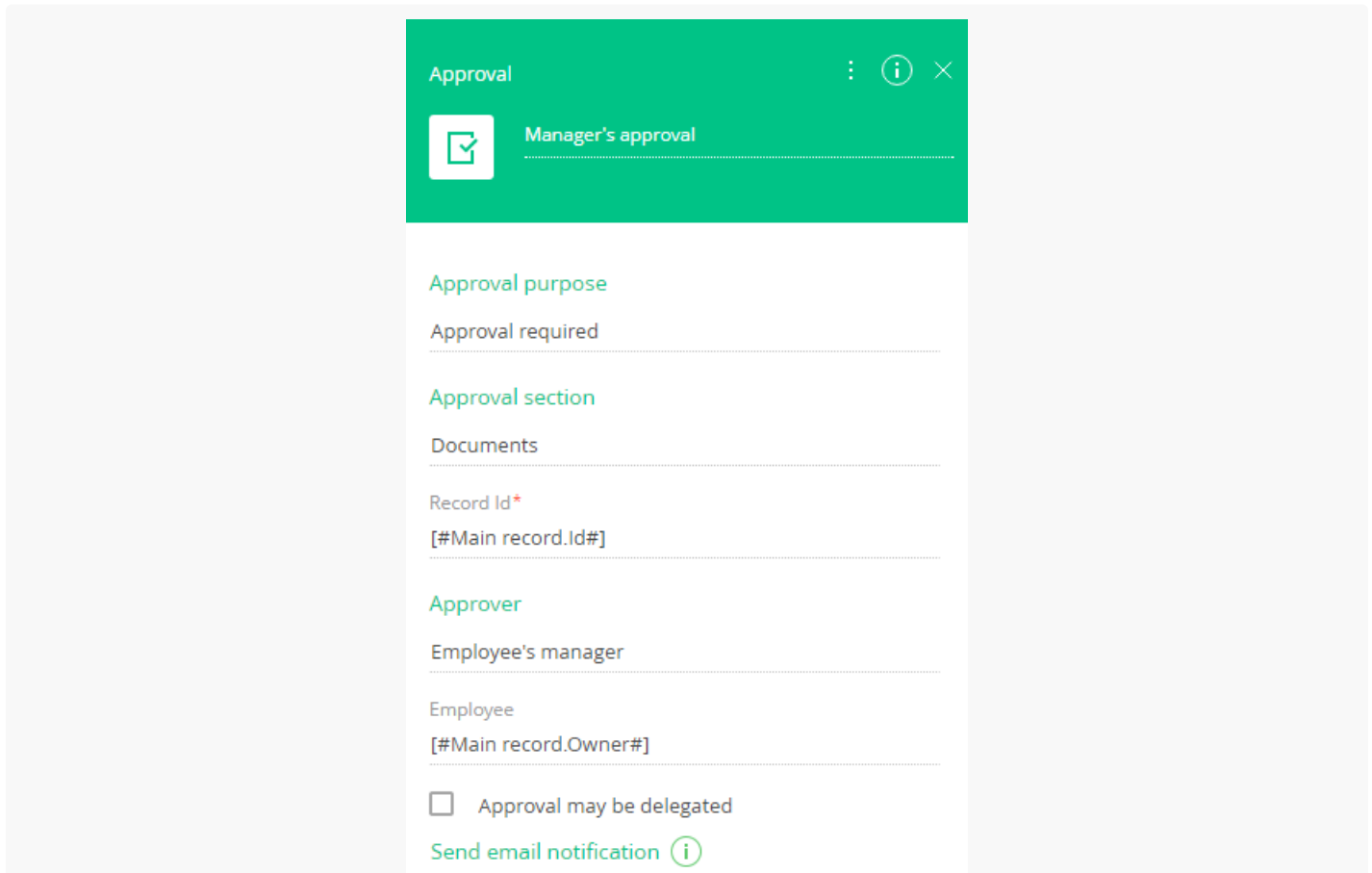
- In the [*Change stage after element is completed*] area, set up the following stage transitions:
 - [*If result*] - “Positive”; [*Set stage to*] - “Completed.” As a result, if the request is denied by the employee’s manager, the case transitions to the [*Canceled*] stage.
 - Click  and add another condition: [*If result*] - “Positive”; [*Set stage to*] - “Completed.” As a result, if the request is approved by the employee’s manager, the case transitions to the [*Completed*] stage. The remaining properties of the “Manager’s approval” case element match those of the “HR approval” element. As a result, the settings for the case element will look like this ([Fig. 12](#)):

Fig. 12 - “Manager’s approval” case element setup area



Approval

Manager's approval

Approval purpose

Approval required

Approval section

Documents

Record Id*

[#Main record.Id#]


Approver

Employee's manager

Employee

[#Main record.Owner#]

Approval may be delegated

Send email notification 

Notify that approval is required

Email template
[#Lookup.Email message template.Email t...

Notify about the approval result

Recipient
[#Main record.Owner.Email#]

Email template
[#Lookup.Email message template.Email t...

Ignore errors on sending

When is the step performed?
After the previous step is complete

Perform after step*
HR approval

Step type
Required step

Change stage after element is completed

If result	Set stage to
Positive	Completed
Negative	Canceled

[+ Add condition](#)

At the [*Completed*] case stage, set up a timer before the document status is changed to “Archive.”

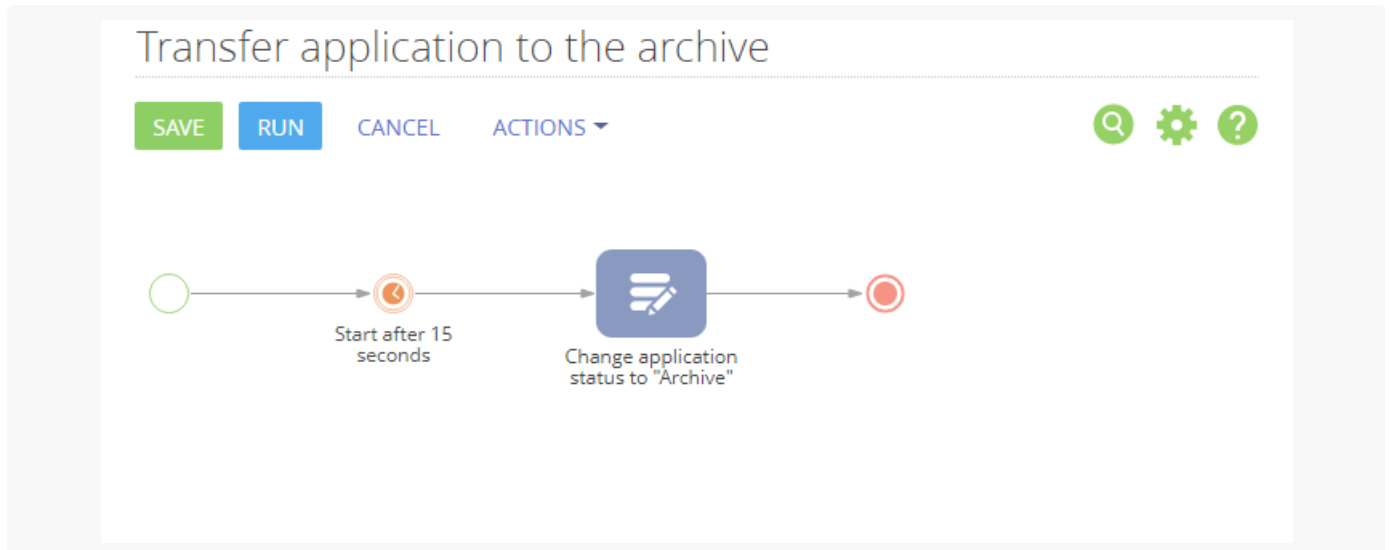
1. Add a new [*Subprocess*] case element on the Case Designer working area on the [*Completed*] stage. Enter the name as “Term of the application relevance” ([Fig. 13](#)).
2. In the [*Which process to run?*] field, click and select the application activation business process. If the business process is disabled in the list, click the button to add it.

A Diagram of the business process of transfer application to the archive is provided in [Fig. 14](#).

The [*Simple start event*] and [*Wait for timer*] process elements – the process will start after 15 seconds after transitioning the case to the [*Completed*] stage.

The [*Modify data*] element will change the status of the completed to “Archive.”

[Fig. 13](#) – Business process diagram



To transfer the application by which the case is running, you should set up the transfer of the main record parameter from the case to the process. In our case, the main record is a document and the parameter which getting is to be configured is the document ID. Perform configuration in the Process Designer if the pass of the parameter is not set up. To do this:


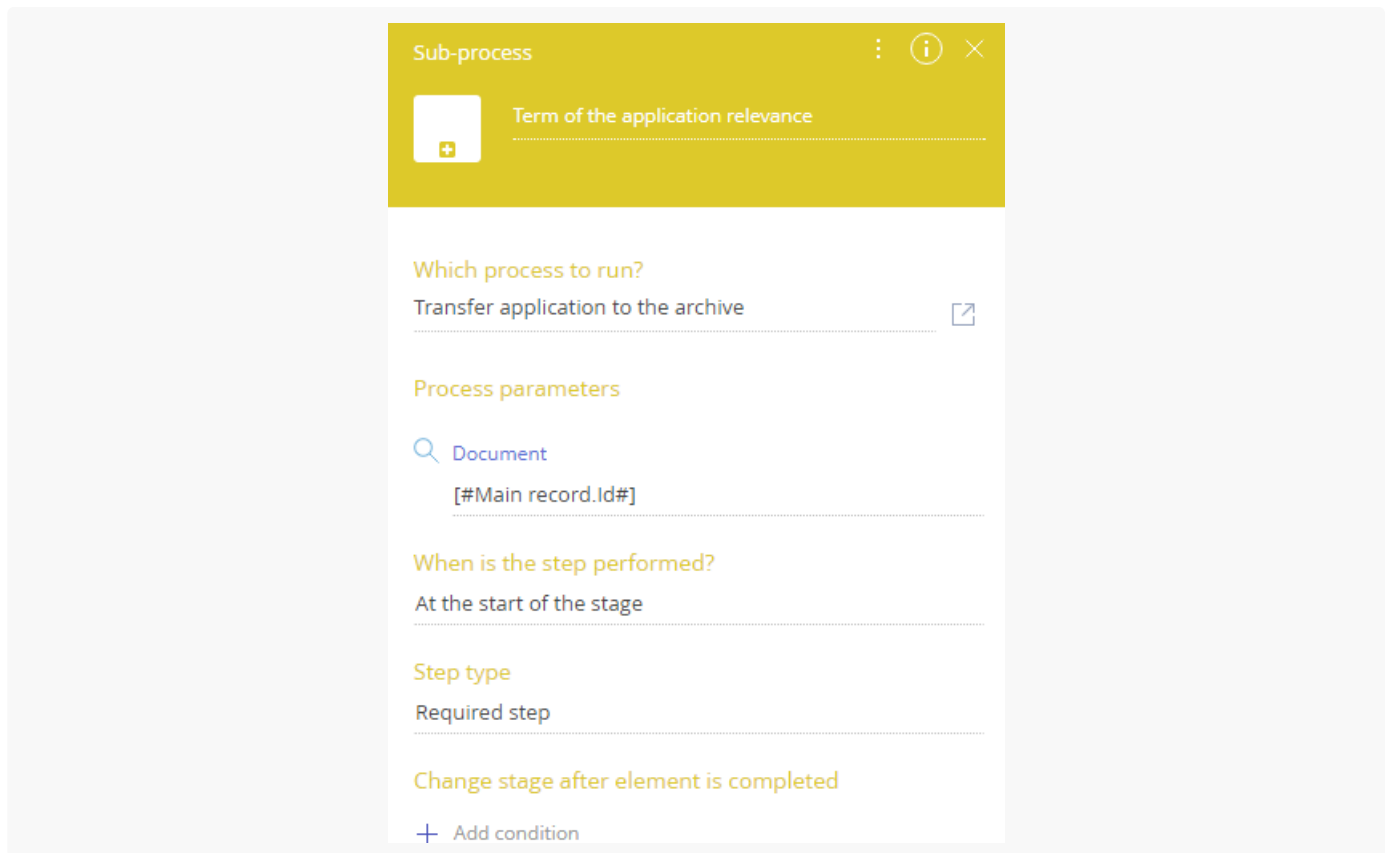
- a. Open the designer of the process of transfer the application to the archive by clicking the  button at the [*Which process to run*] field.
 - b. Double click on the designer workspace to display the edit page of the process parameters.
 - c. Click the [*Add parameter*] button on the [*Parameters*] tab.
 - d. Select the “Lookup” in the list of the parameter types and specify the “Document” value in the [*Lookup*] field.
 - e. Save the changes.
3. Return to the Case Designer to the configuration of the “The term of the application relevance” element properties. After you specify the process in the [*Which process to run*] field the parameter described above will be displayed in the [*Process parameters*] area.
 4. The “At the start of the stage” value will be displayed by default in the [*When is the step performed?*] field.
 5. The “Optional step” will be displayed in the [*Step type*] field. You can make it required, if necessary.

Fig. 14 – “The term of the application relevance” element properties



6. Save all changes made in the Case Designer.



Configuration results


As a result, all documents of the “Request” type will be processed according to the “Leave of absence approval” case (Fig. 15). As soon as an employee who created a request clicks the [*Approval*] stage, the document is submitted for approval to HR. If HR denies the approval, the document status is set back to “Draft.” If HR approves the document, it is submitted for the employee's manager's approval. If the manager denies the approval, the document status is set to “Canceled.” If the manager approves the request, the document status is set to “Completed.”

Fig. 15 – Case for leave request approval






Request-2334-Leave of absence

What can I do for you? >


SAVE CANCEL ACTIONS  VIEW 

 >

Draft > **Approval** > Completed > Canceled



NEXT STEPS (0)     

Number * Request-2334-Leave of absence Date * 12/1/2017

Type * Request Owner *  Ryan Pech

Status * Approval

< GENERAL INFORMATION HISTORY ATTACHMENTS AND NOTES **APPROVALS** FEED >

 Approvals 

Approval purpose	Document	Delegation permitted	Delegated from
HR approval required for a leave of absence request	1345235	No	