



Approvals

Introduction

The Workspace Approvals system is a highly flexible module designed to facilitate the approval of a wide range of items entered into the system. As this is usually a requirement for many different forms of data e.g. Documents, Drawing Issues, Variations, Project records etc. it has been developed as a 'black box' solution with a simple and easy to implement interface.

Main features

- Approval routes are defined by linking approval teams to approval stages.
- Each stage can be linked to a single team for serial approval i.e. if any member of the team approves the item it moves to the next stage, or multiple teams for parallel approval i.e. one member of each of the teams must approve the item before it moves onto the next stage.
- Items awaiting approval are displayed in an approvals 'dashpart' (a special notification area on the users personalised dashboard) from where the user can view the full details of the item and the approval route being followed.
- Email is used to warn a user that unapproved items are waiting to be processed in their approval dashpart.
- Items in the dashpart can be moved on in one of three ways; 'Approve' moves the item to the next stage (once the last stage has been approved the action defined for the final approval is executed), 'Delegate' allows the user to select a proxy to act on their behalf, and 'Reject' moves the item out of the approval route.
- Rejecting an item causes a notification to be sent to warn the originator accordingly.

- To allow the approvals system to deal with varied styles of data the following are user definable; Approved Stored Procedure (i.e. the conditions inherited when the item leaves the approval route as approved), Rejected Stored procedure (run when the item leaves the approval route at any stage as rejected), View Item (a web page that allows the approvers to view the detail of the item they are requested to action).
- Email notifications are generated for the items originator keeping them aware of its progress through the approval route.

Who uses it?

The Approvals system is used by organisations wanting to introduce a greater level of control and sign-off over key documents or procedures in their business. Its simple interface makes it easy for any member of the team to become involved in the approval process and the various notification options available ensure that everyone is kept up to date with progress of items awaiting their approval.