

Approval Workflow Setup

Step 1: Workflow

- Find active workflow in the toolbar at the purchase order transaction window.
 - Search that active workflow in the workflow window.
 - Create a new node in the workflow as (Request For Approval)*
 - Set configuration as below mentioned
1. Entity Type: User Maintained
 2. Workflow Responsible: There are two types (1. Invoker, 2. Organization)
 - 1) Invoker: It will take supervisor if from user window.
 - 2) Organization: It will take user name from the organization window
 3. Start Node: Automatic
 4. Joint Element: OR
 5. Action: User Choice
 6. Column: IsApproved
 7. Add Next node as (complete) in Transition TAB.
 8. Select Prepare Node and add below Transition
 - 1) Transition-1: Request For Approval
 - Condition-1: Sequence 10 (And/Or = And, Column = IsApproved, Operation: =, Value: N, Entity Type: Konnect Analytics)
 - Condition-2: Sequence 20 (And/Or = And, Column = IsSOTrx_Sales Transaction, Operation: =, Value: N, Entity Type: Konnect Analytics)
 - 2) Transition-2: Complete
 - Condition-1: Sequence 10 (And/Or = Or, Column = IsApproved, Operation: =, Value: Y, Entity Type: Konnect Analytics)
 - Condition-2: Sequence 20 (And/Or = Or, Column = IsSOTrx_Sales Transaction, Operation: =, Value: Y, Entity Type: Konnect Analytics)

Step: 2 Role & User

- User Role: Set Approval limit for that role and also can set a cumulative Amount for all the transaction. uncheck Approve own documents, Check access all org and set supervisor in user window.
- Approver Role: Set Approval limit (999,999) for that role and also can set a cumulative Amount for all the transaction. Check Approve own documents.
- Note: If Approver is not set in the supervisor field (user or Organization) system will throw an error as no approver.

Step: 3 Approval Flow

- The system will check either supervisor mapped to that user.
- Next, it will check the currency to have any conversion.
- Next, it will check the requested approval amount is within the approval amount configured in Role.
- Next, it will check the requested approval amount is within the Approval Amount Accumulated.
- Requested Approval will show in workflow activities on the home page.

Revision #5

Created Sat, Jun 6, 2020 6:50 PM by [Harishprabu G](#)

Updated Mon, Jun 8, 2020 3:46 PM by [Harishprabu G](#)