TRADOGRAM
APPROVAL WORKFLOW GUIDE

Approval Configuration

Approval workflows consist of one or more assigned users providing approval to documents that are created by other users on the system, prior to being processed further. Approvals can be configured for a variety of different documents, and can optionally be included in other workflows:

- Requisition Workflow
- Purchase to Pay Workflow

In this workflow testing guide, a generic approval rule which can be applied to a variety of documents will be created.

To create a new approval rule:

1. Click the dropdown menu at the top right, and select “Manage Branch”
2. Select “Approvals” from the panel on the left
3. Click the “Add New Approval” option in the top right
4. Under the “Transaction Type”field, select which type of document the approval rule will apply to
5. Under the “Hierarchy Level” field, select which level of users the approval will be issued to. When multiple approval rules are applied that have the same criteria, approval notifications will be sent to all approvers on level 1 first, followed by approvers on level 2, and so forth. Each level of approvals must be granted by all users on the lowest level before an approval notification will be sent to users on the next level (users that higher approval levels will be marked with the “Waiting” status until all lower level approvals are granted).
6. Under the “Approver” field, select the user to whom the approval will be routed when the requirement is activated
7. For testing purposes on a free single user account, check off the “Approvers must approve their own transactions” checkbox. Normally, when a user creates a document for which their own approval is required, that approval rule is bypassed. When this option is selected, the user will instead be required to grant their own approval on the document, despite also being the user who created the document
8. Enter at least one criteria rule for the approval. On a new, single user free account, a price threshold may be the only available option (additional options including categories, departments, and projects can also be selected once configured). Enter a minimum monetary value (left side field), or a maximum monetary value (right side field), or a monetary range (values entered in both fields), to which the approval rule will apply.
9. Click the “Save Approval” button at the bottom right to confirm and activate the new approval rule

The approval will be listed under the “approvals” panel, and the approval requirement will be actively applied to any created documents that fall under the included criteria for that rule. Approval rules can also be tested without the creation of a new document - to do so:

1. Navigate to approval management (click the top right dropdown menu, select “Manage Branch”, and then select the “Approvals” tab from the panel on the left)
2. Click on the “Test Approvals” option at the bottom right of the “Approvals” panel
3. For the “Transaction Type” field, select the same document type that was chosen for the created approval rule
4. For the “Created By” field, select the user that was assigned to the approval rule
5. For the “Amount” field, enter a simulated transaction price that aligns with the price threshold of the approval rule that was created
6. Click the “Find Matching Approvals” button at the bottom right to generate a list of approval requirements for the simulated document

Multiple approval rules can apply to the same document. By creating multiple approval rules with overlapping or identical criteria, flexible approval routing can be accomplished for each transaction type, as well as different categories, projects, and departments.

To further test approval workflows, inquire about a free premium trial of Tradogram after scheduling a live demo with a product expert. This will allow multiple user accounts to be added to the system for additional approval testing and configuration.

Workflow Testing Options

Ready to start testing?

Visit tradogram.com/resources/knowledge-base/user-guide/ for more workflow guides.

Available workflows for testing on a free account:

- Testing purchase order, invoice, and delivery entry (Purchase to Pay Solution)
- Testing request (RFX) creation (Strategic Sourcing and Negotiation Solution)
- Testing contract creation (Contract Management Solution)
- Requisition creation (Multiple Solutions)
- Approval configuration (Spend Control Solution)