

Creating & Associating Approval Workflows

37 Steps [View most recent version](#) 

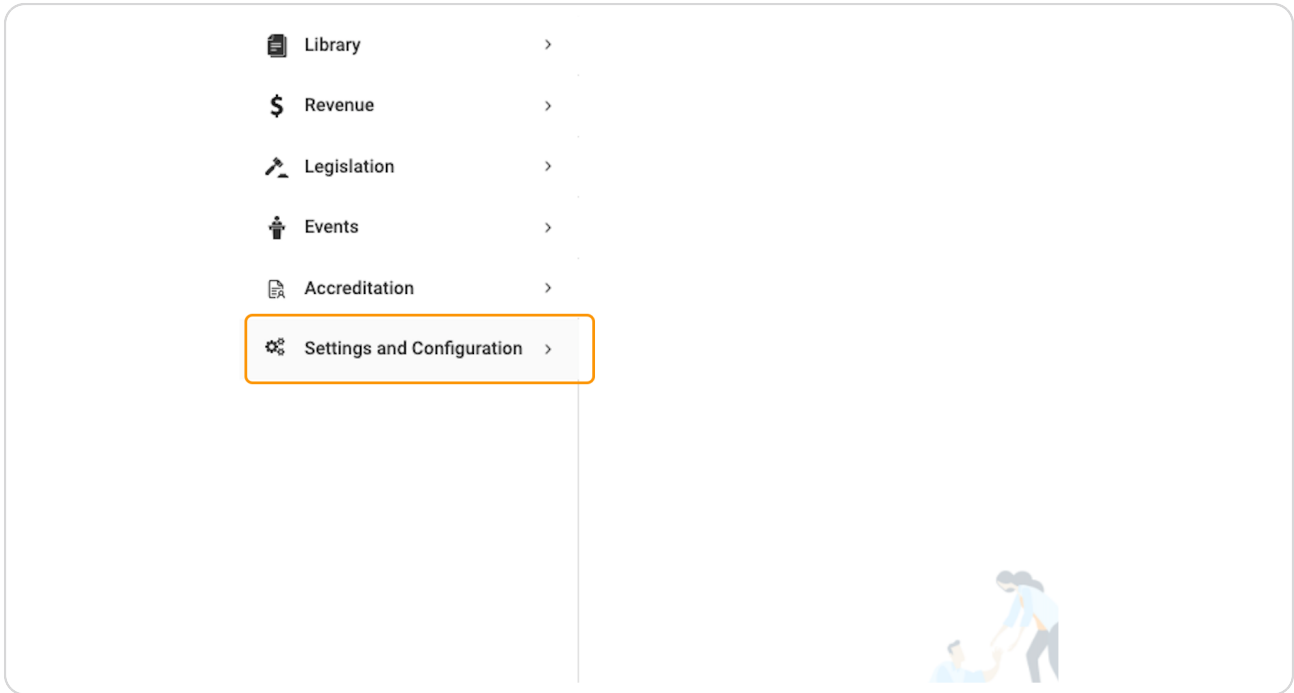
Created by
Engagifii Inc.

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October 20, 2023

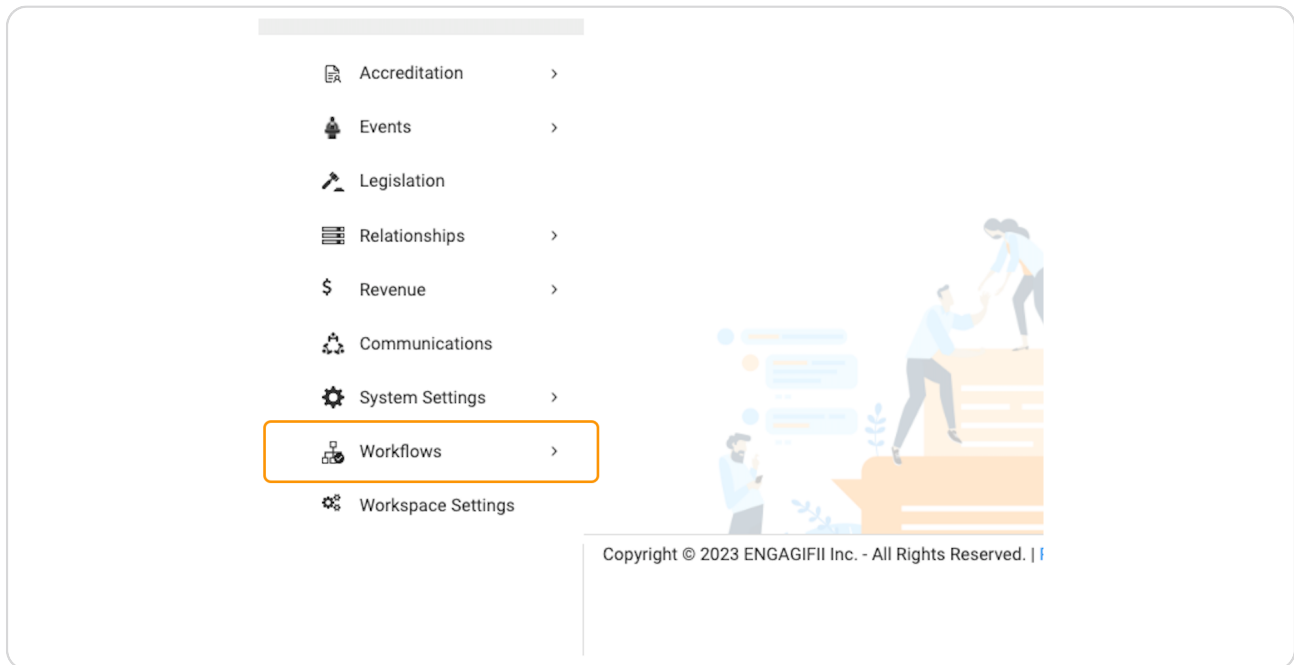
STEP 1

Click on Settings and Configuration



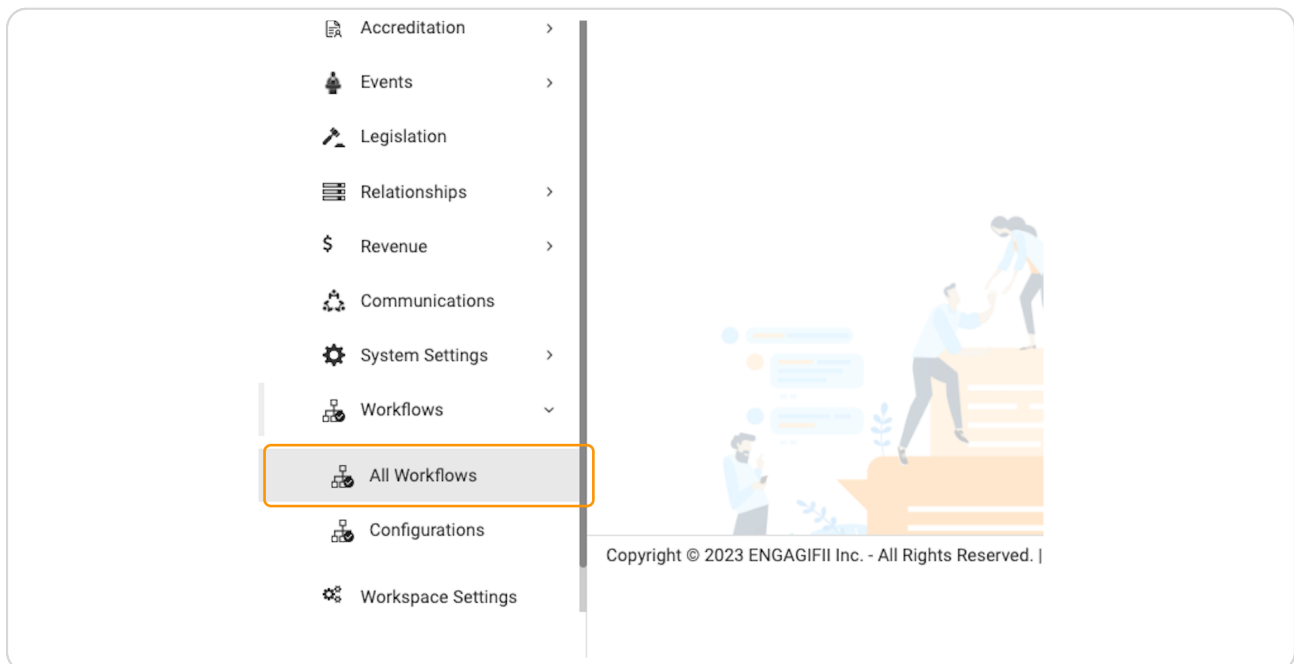
STEP 2

Click on Workflows



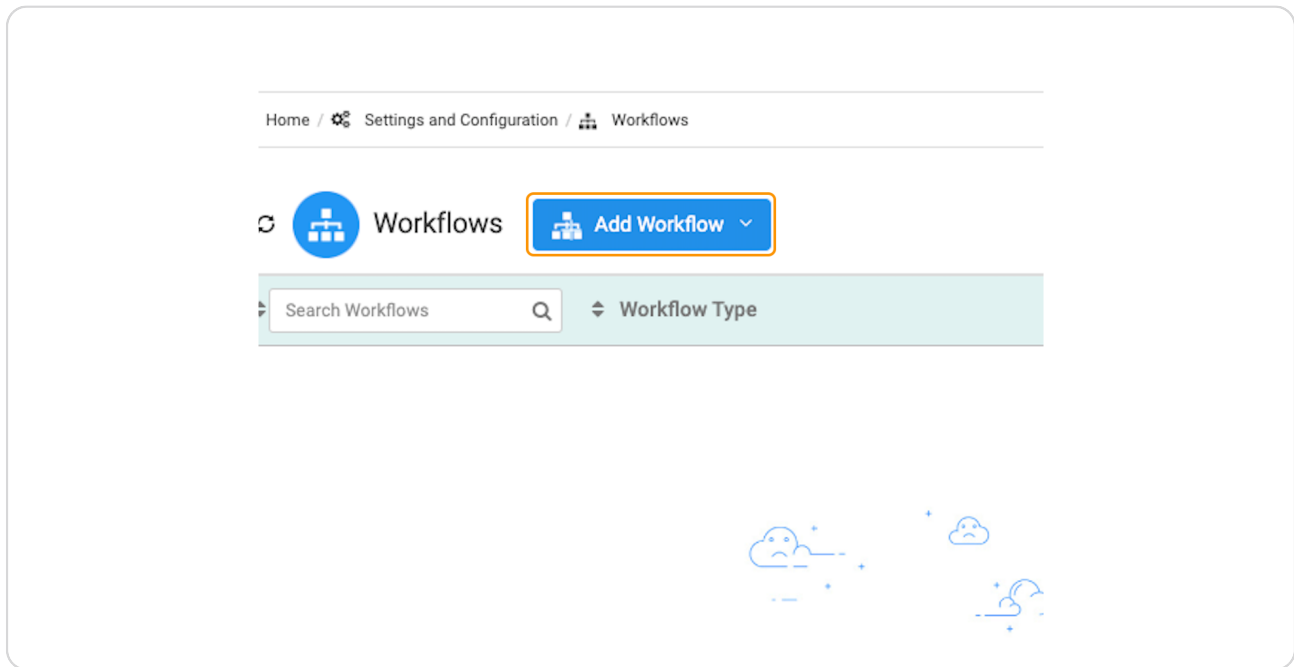
STEP 3

Click on All Workflows



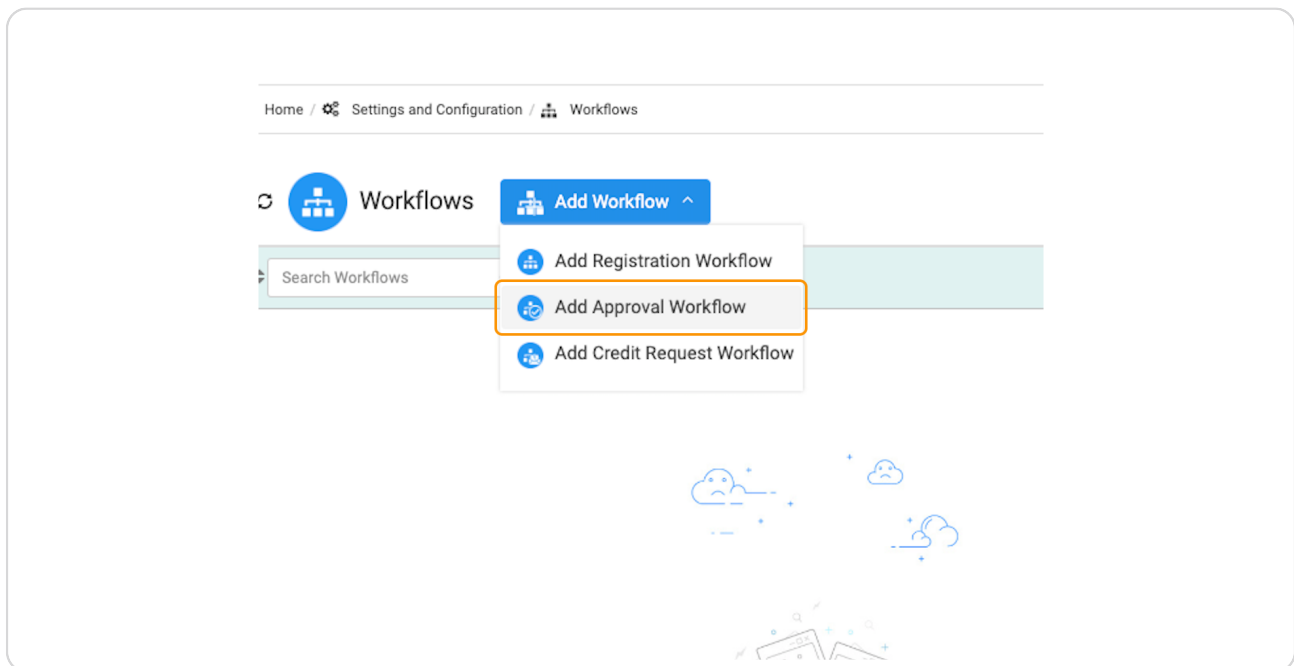
STEP 4

Click on Add Workflow



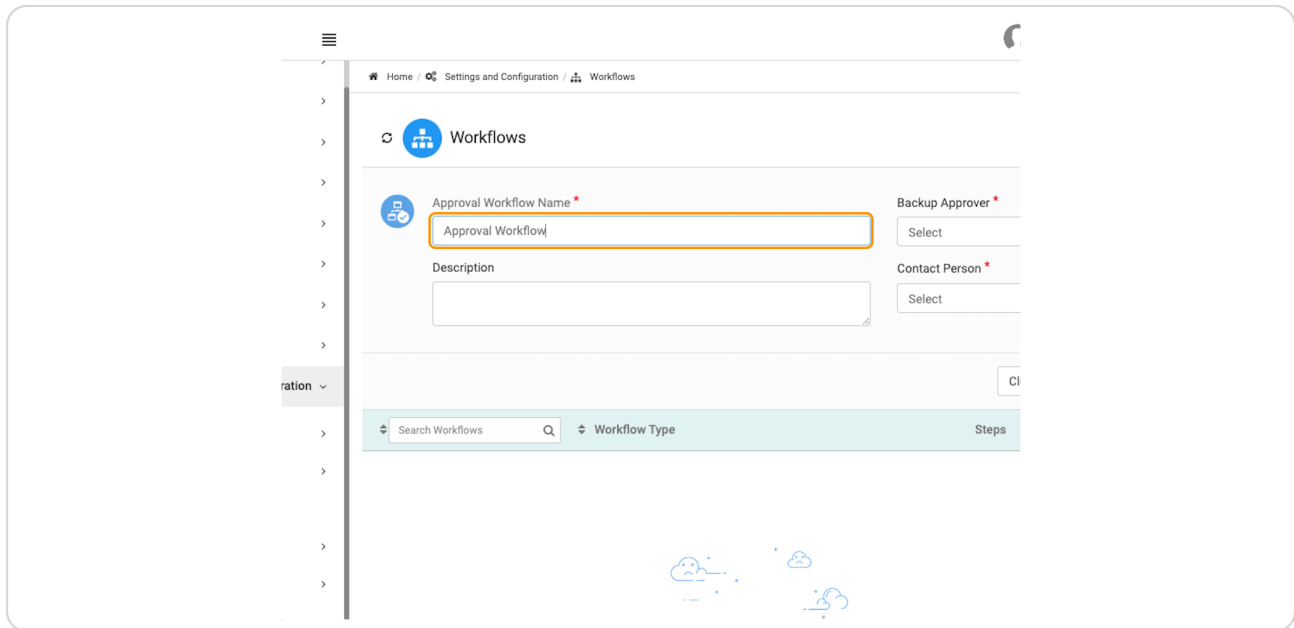
STEP 5

Select Add Approval Workflow



STEP 6

Type the name of your workflow into the Approval Workflow Name field

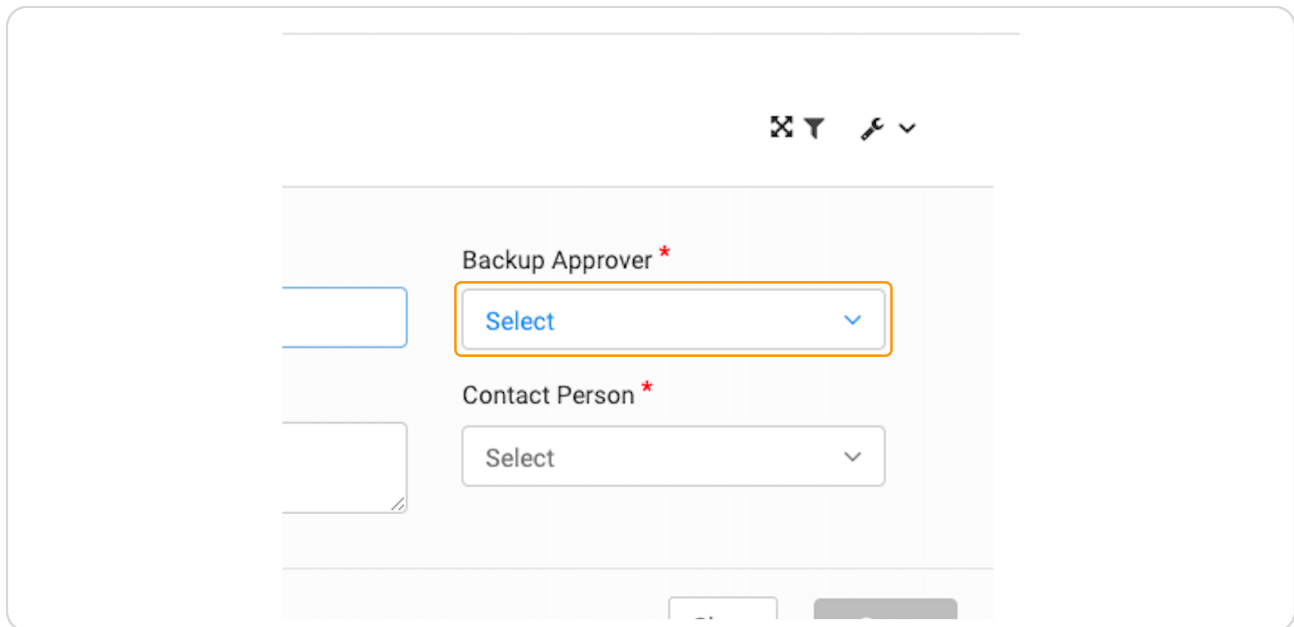


The screenshot shows a web interface for configuring workflows. The breadcrumb trail is 'Home / Settings and Configuration / Workflows'. The main heading is 'Workflows'. There are two input fields: 'Approval Workflow Name' and 'Description'. The 'Approval Workflow Name' field contains the text 'Approval Workflow' and is highlighted with an orange border. To the right of these fields are two dropdown menus: 'Backup Approver' and 'Contact Person', both with 'Select' as the current value. At the bottom, there is a search bar for 'Search Workflows' and a 'Workflow Type' dropdown menu.

STEP 7

Select your Backup Approver

This is used if you have an slotted time for an approval, and the original approver does not process the request



The screenshot shows a close-up of the configuration form. The 'Backup Approver' dropdown menu is highlighted with an orange border and shows the word 'Select' in blue text. Below it is the 'Contact Person' dropdown menu, also showing 'Select'. There are also some icons at the top right of the form area, including a close button, a filter icon, and a settings icon.

STEP 8

Select your Contact Person

Backup Approver *

School Approver

Contact Person *

Select

Close Save

Steps Action

STEP 9

Click Save

Contact Person *

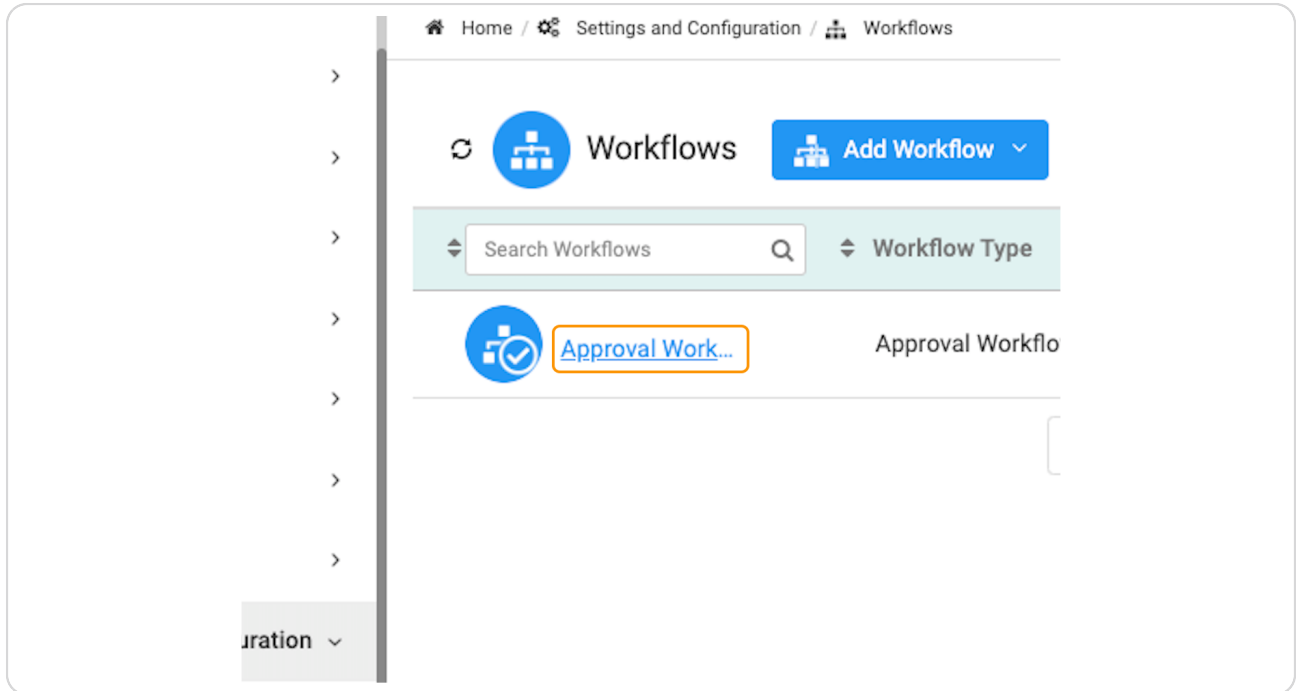
District Approver

Close Save

Steps Action

STEP 10

Click on your new Approval Workflow name



STEP 11

We'll first set up the approve criteria

Crescence Admin

Home / Workflows / Approval Workflows

Approval Workflow

Description:

Backup Approver *: Approver, School

Contact Person *: Approver, District

Edit

Approve Criteria Approval Steps

Reset

AND OR

Add Rule Set Add Rule

Select Select

STEP 12

Click on Edit

Reset

Edit

Reset

STEP 13

Select your Approve Criteria settings

You have the option to choose from various fields/types here - Organization, Role, etc

The screenshot shows a configuration interface for 'Approve Criteria'. On the left is a sidebar with a menu containing 'Configuration', 'on', 'ps', 'ations', and 'tings'. The main content area has two tabs: 'Approve Criteria' (selected) and 'Approval Steps'. Below the tabs, there are 'AND' and 'OR' buttons. A dropdown menu is open, showing 'Organization' selected and highlighted with a blue and orange border. To the right of the dropdown is a 'Select' button with a red border. Below this, there are several empty input fields.

STEP 14

Click on Save

The screenshot shows the bottom portion of the configuration interface. It features three empty input fields on the left. On the right, there is a blue 'Save' button with a document icon and a dropdown arrow, highlighted with a blue and orange border. Below the input fields, there is a 'Reset' button with a circular arrow icon.

STEP 15

Click on Approval Steps

Approval Workflow
Description:
Backup Approver *: Approver, School
Contact Person *: Approver, District

Approvee Criteria **Approval Steps**

AND OR

Organization All Organizations

STEP 16

Click on Edit

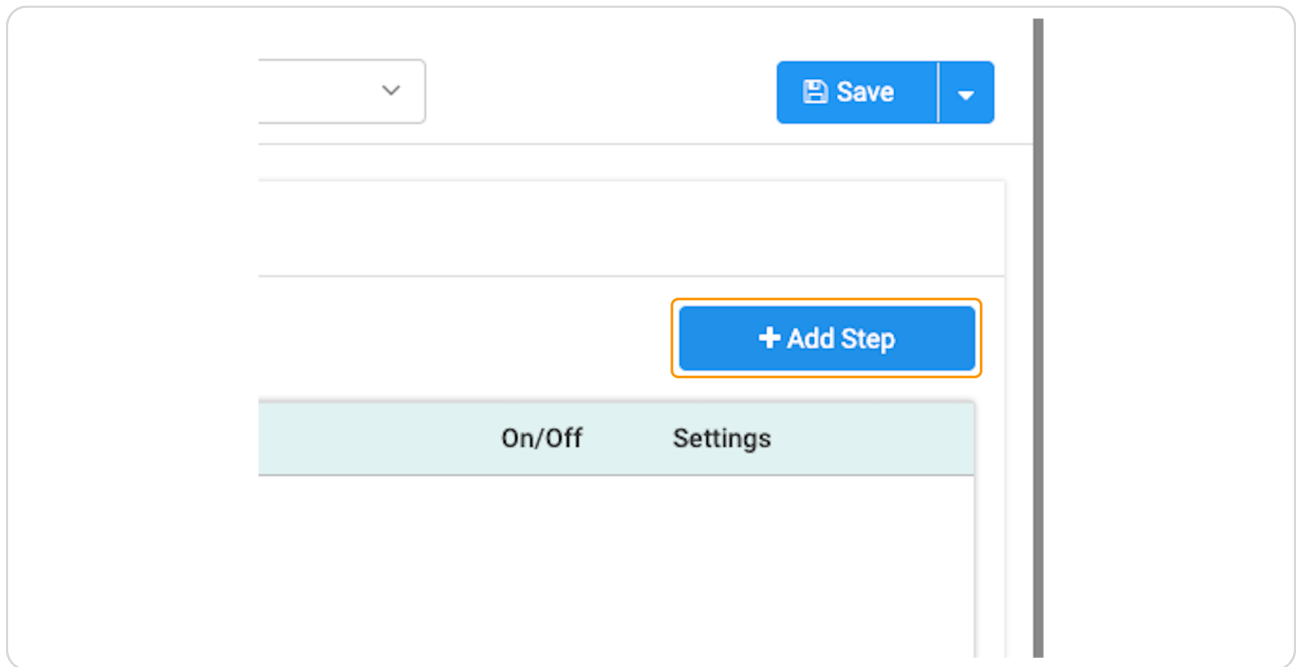
×

Edit

+ Add Step

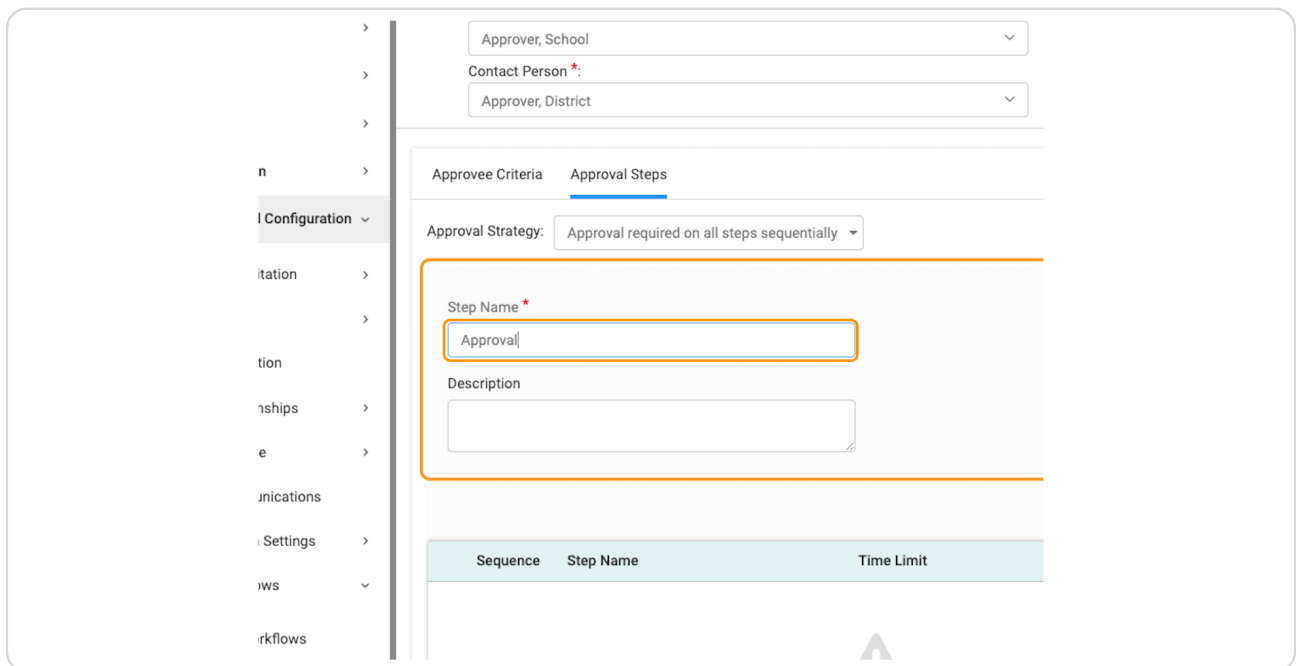
STEP 17

Click on Add Step



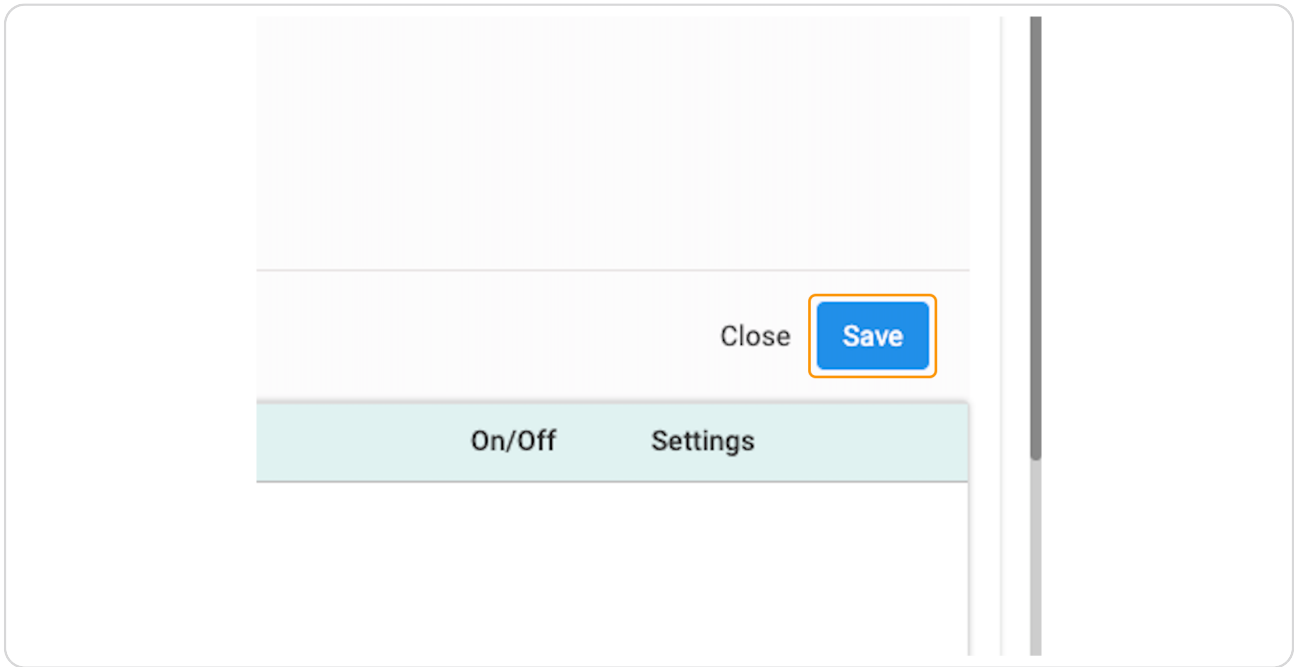
STEP 18

Add your Step Name



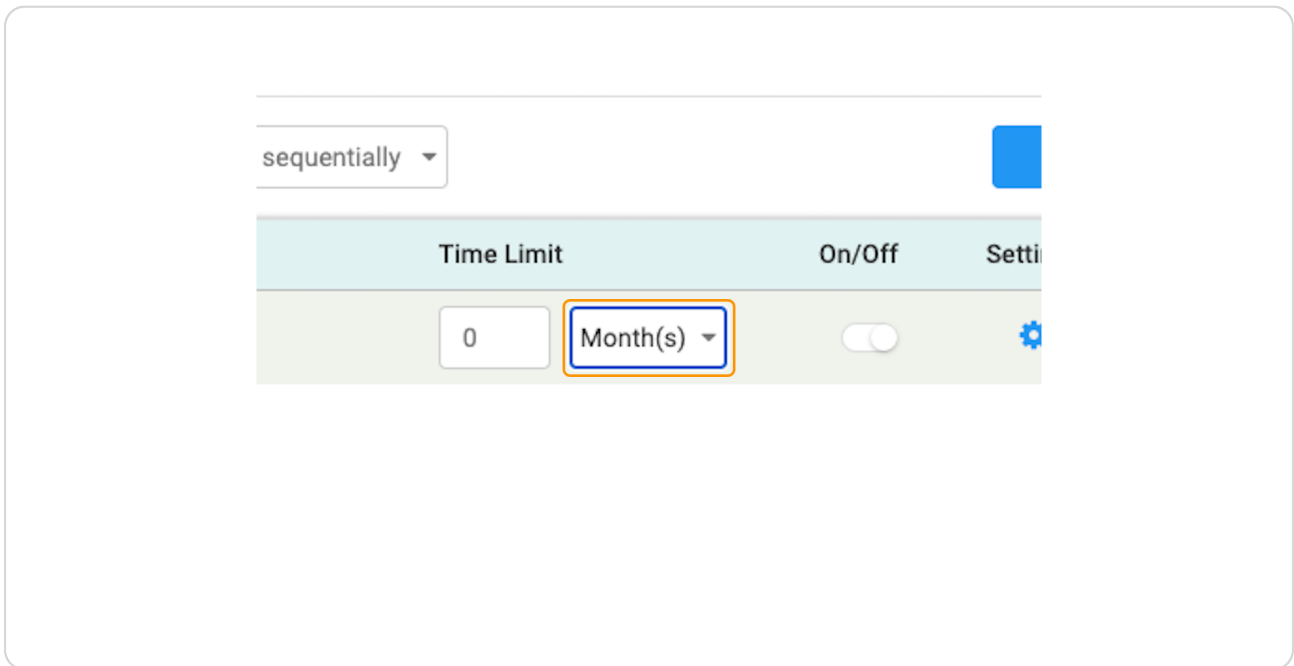
STEP 19

Click on Save



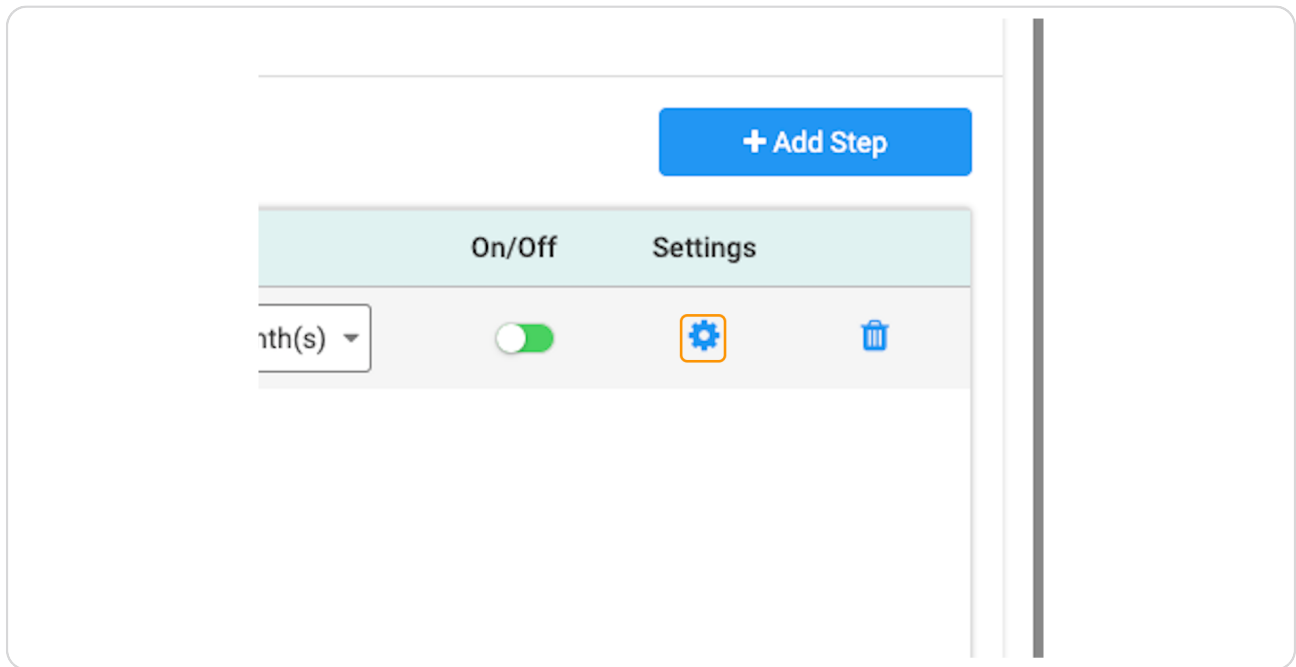
STEP 20

Choose your time limit, if applicable



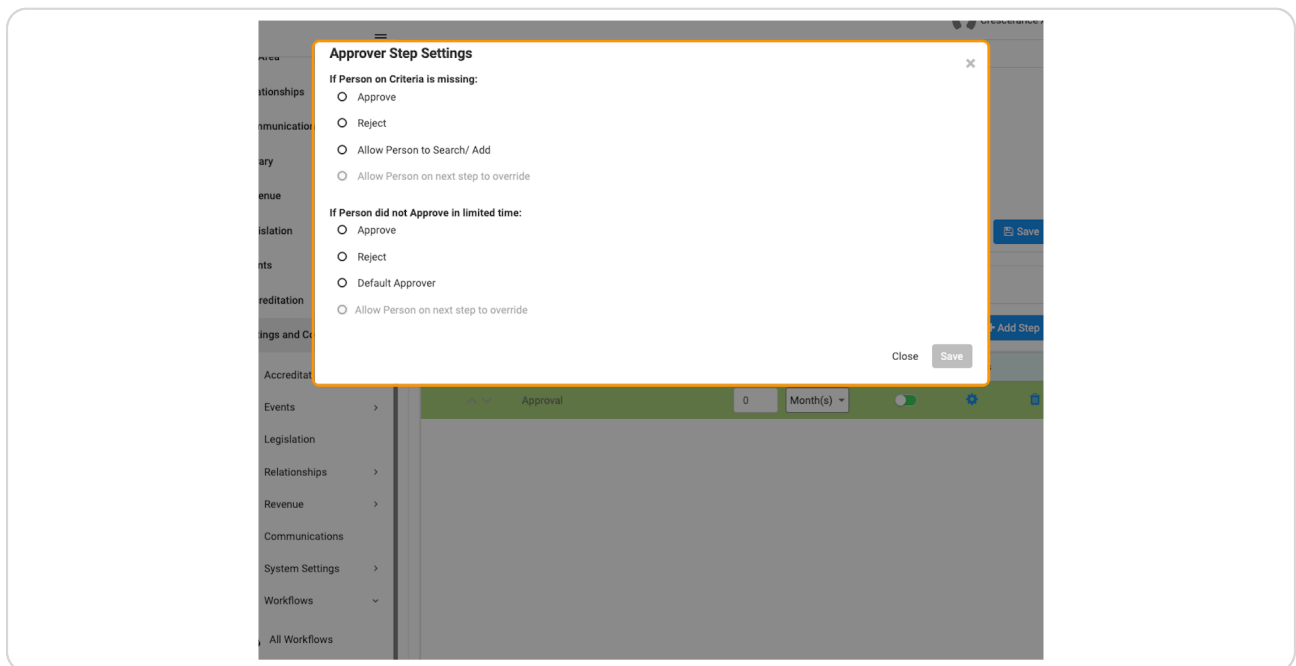
STEP 21

Click on the Settings wheel



STEP 22

Select the relevant settings



STEP 23

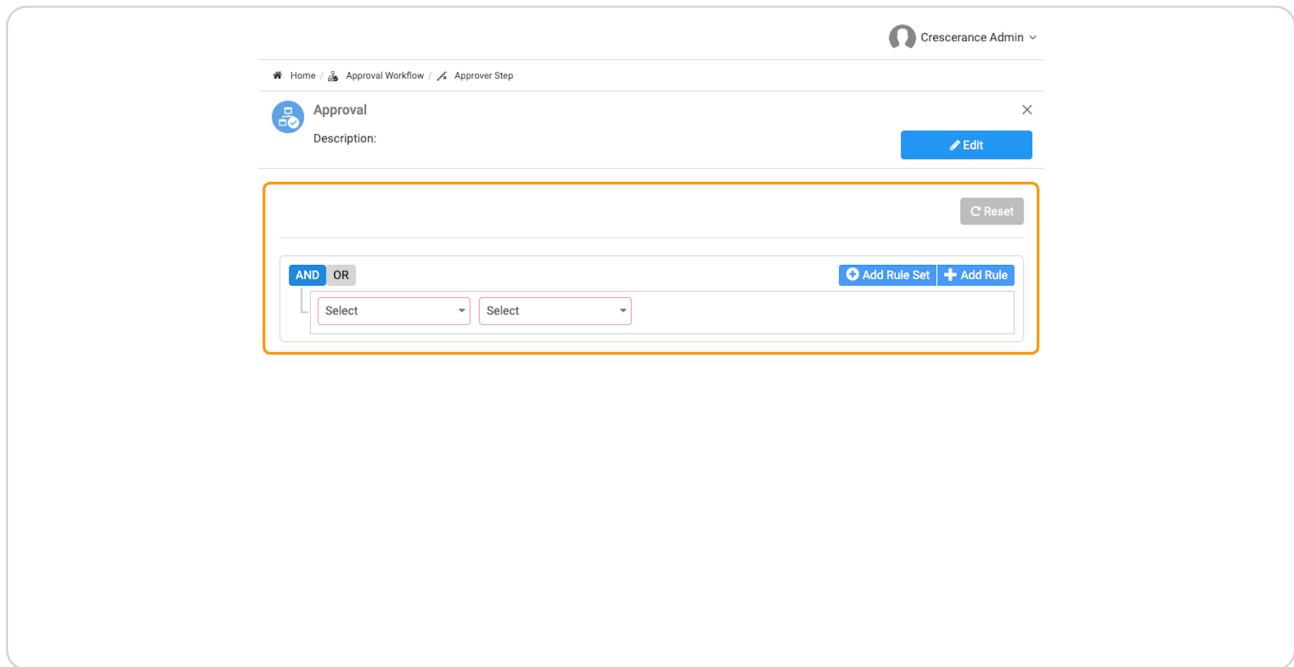
Click on the name of your Approval step

Approve Criteria **Approval Steps**

Approval Strategy: Approval required on all steps sequential

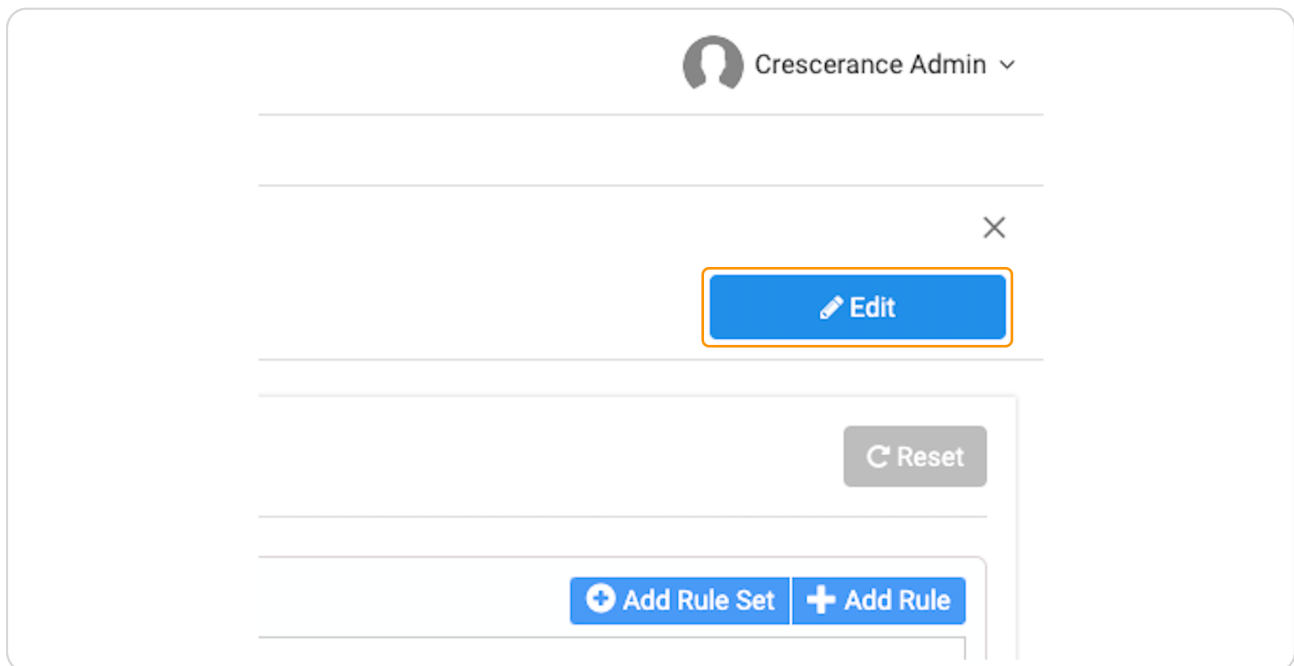
Sequence	Step Name
^ v	Approval

STEP 24



STEP 25

Click on Edit



STEP 26

Set your criteria (in this example we are using a single individual). Choose Person from the first box

The screenshot shows a configuration interface for a step. On the left is a vertical sidebar with a list of items: 'nfiguration' (with a dropdown arrow), 'on', and 'ps'. The main area contains a text input field labeled 'Enter Step Description'. Below it is a logic builder section with two buttons: 'AND' (highlighted in blue) and 'OR'. A dropdown menu is open under 'AND', showing 'Person' selected and highlighted with a blue and orange border. To the right of this dropdown is another dropdown menu labeled 'Select'.

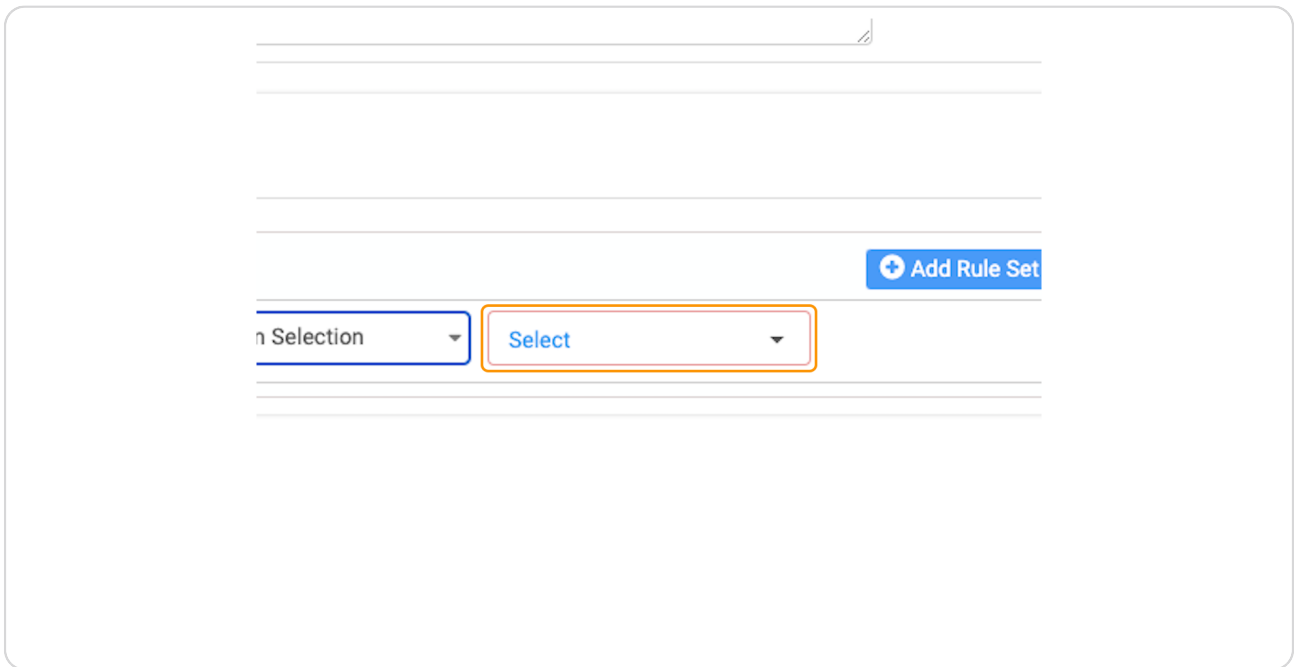
STEP 27

Select Person Selection in the second box

The screenshot shows a configuration interface for a step. At the top is a text input field labeled 'Enter Step Description'. Below it is a logic builder section with a button labeled 'OR'. A dropdown menu is open under 'OR', showing 'Person Selection' selected and highlighted with a blue and orange border. To the left of this dropdown is another dropdown menu labeled 'Person', and to the right is a dropdown menu labeled 'Select'.

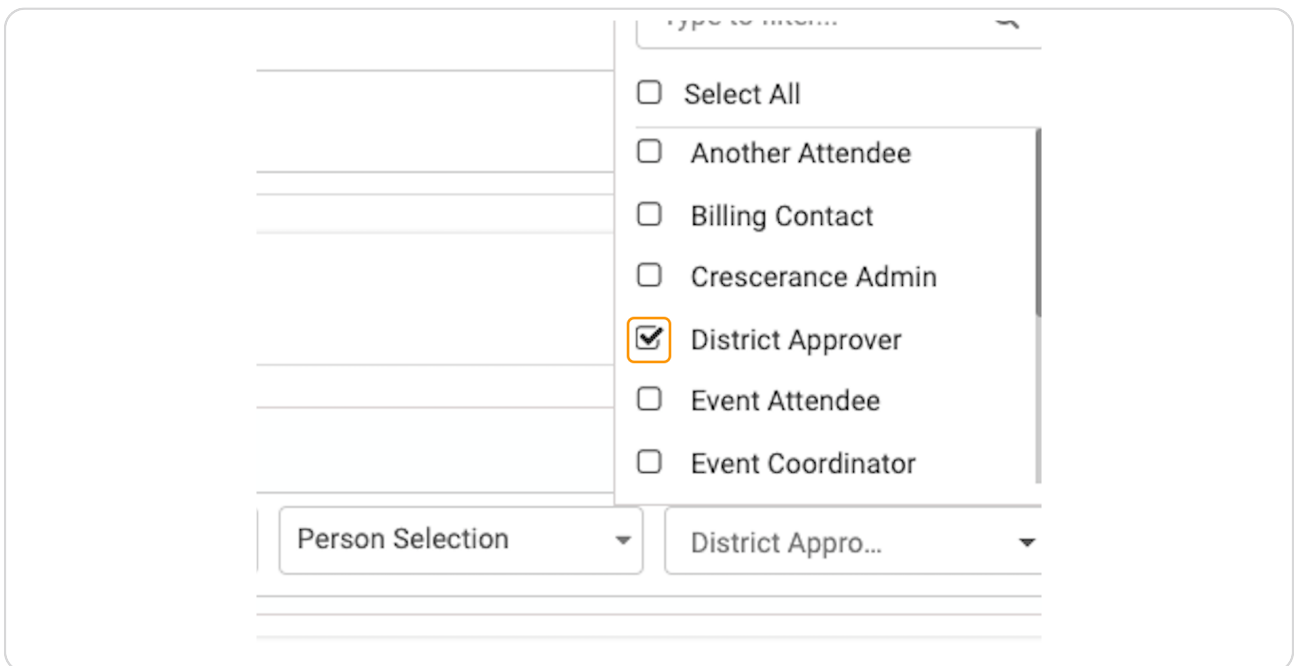
STEP 28

Click on Select to bring up the list of available approvers



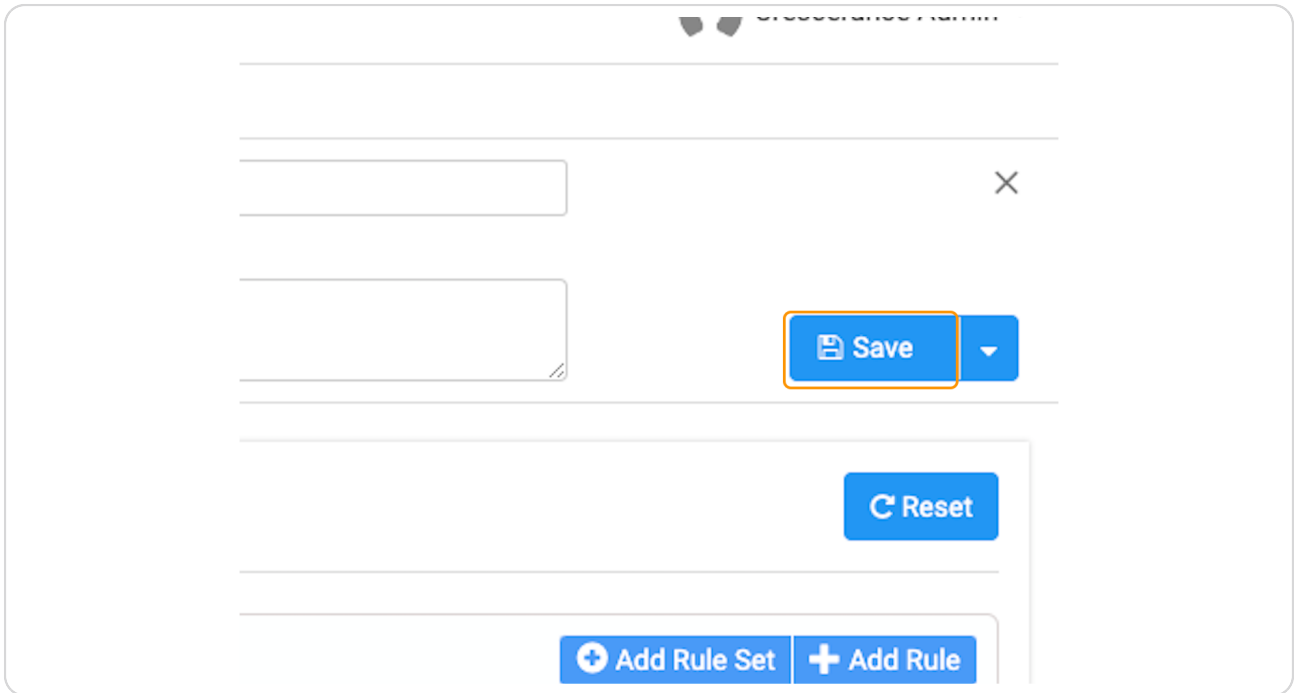
STEP 29

Check the box for the individual(s) you would like to be approvers



STEP 30

Click on Save

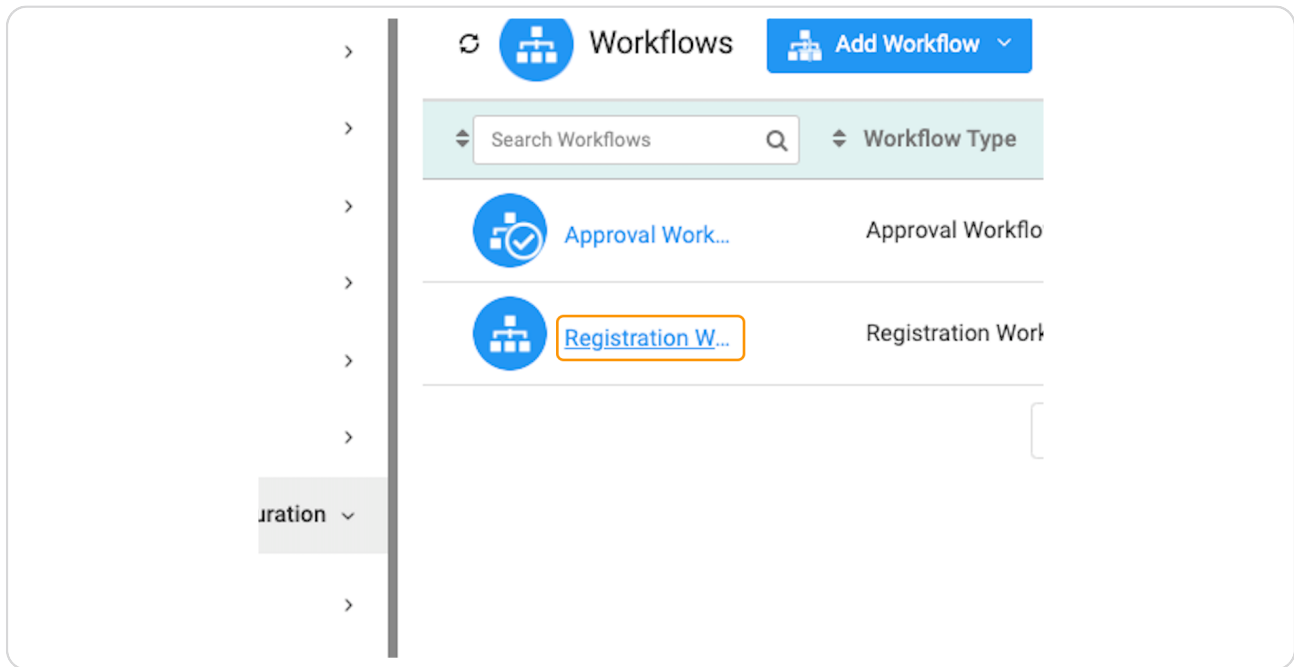


The screenshot shows a web form interface. At the top, there are two empty text input fields. Below them is a larger text area with a close button (X) in the top right corner. To the right of the text area is a blue button labeled 'Save' with a document icon, which is highlighted with an orange border. Below the text area is a blue button labeled 'Reset' with a circular arrow icon. At the bottom of the form are two blue buttons: '+ Add Rule Set' and '+ Add Rule'.

 **Associating your Approval Workflow with a Regis...** 7 Steps

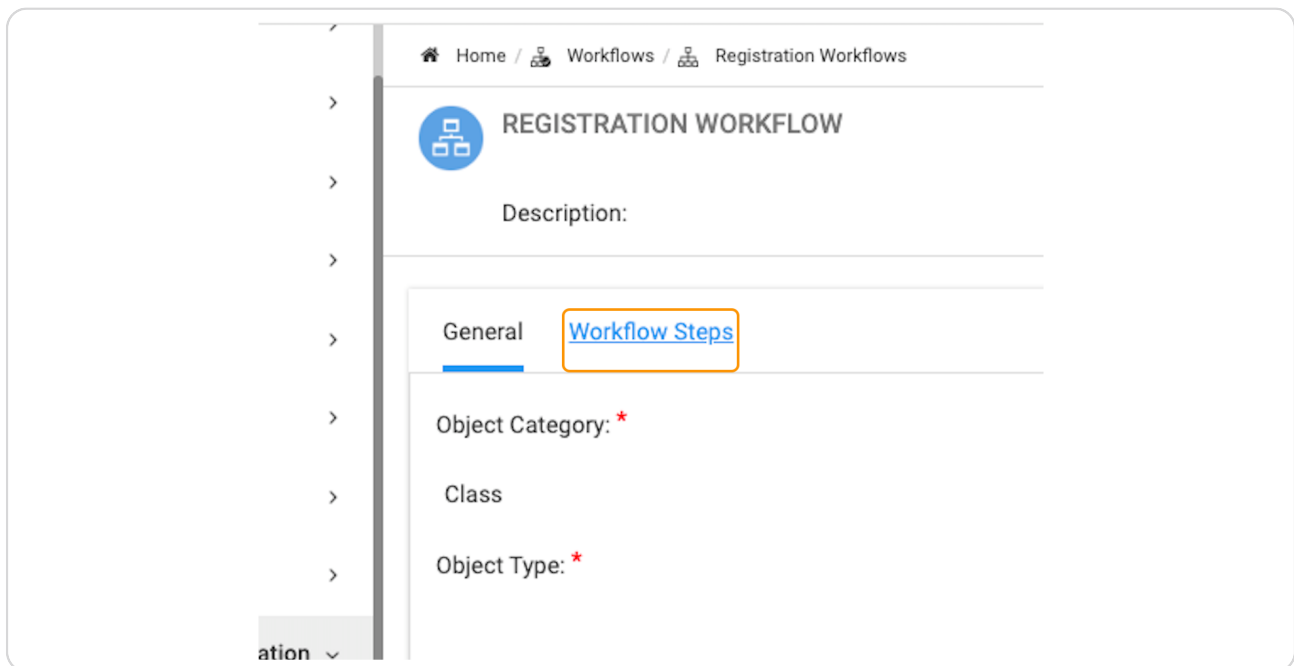
STEP 31

Click on your Registration Workflow



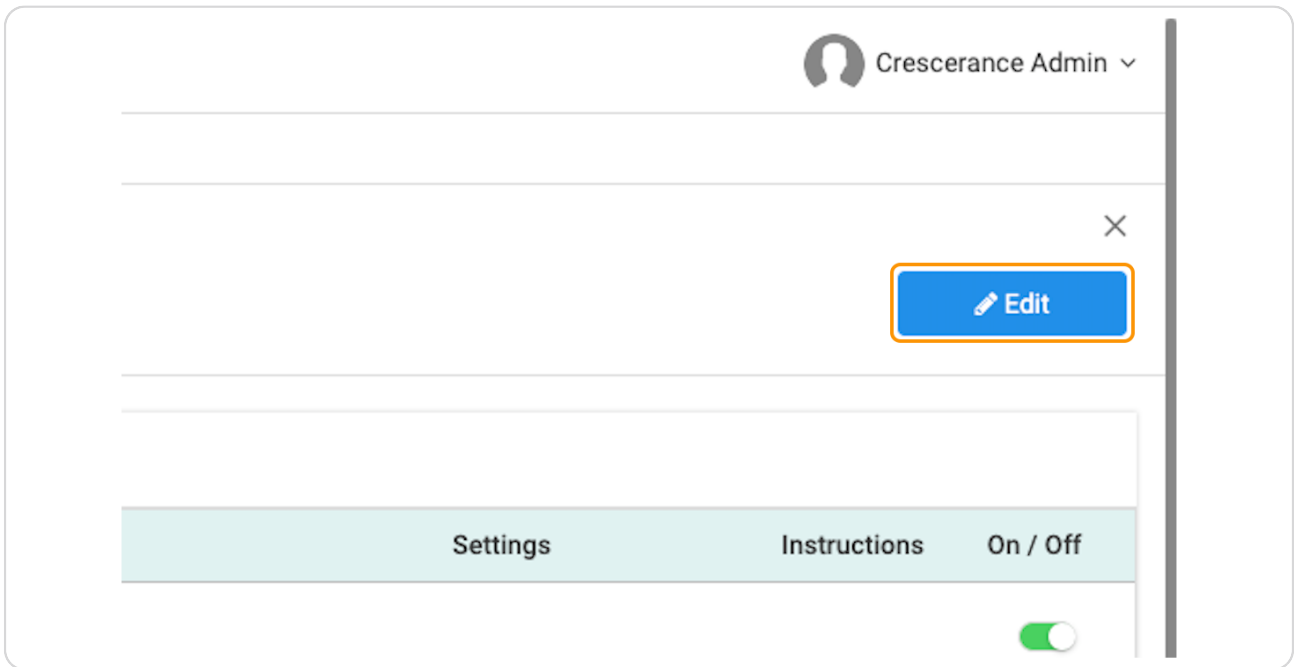
STEP 32

Click on Workflow Steps



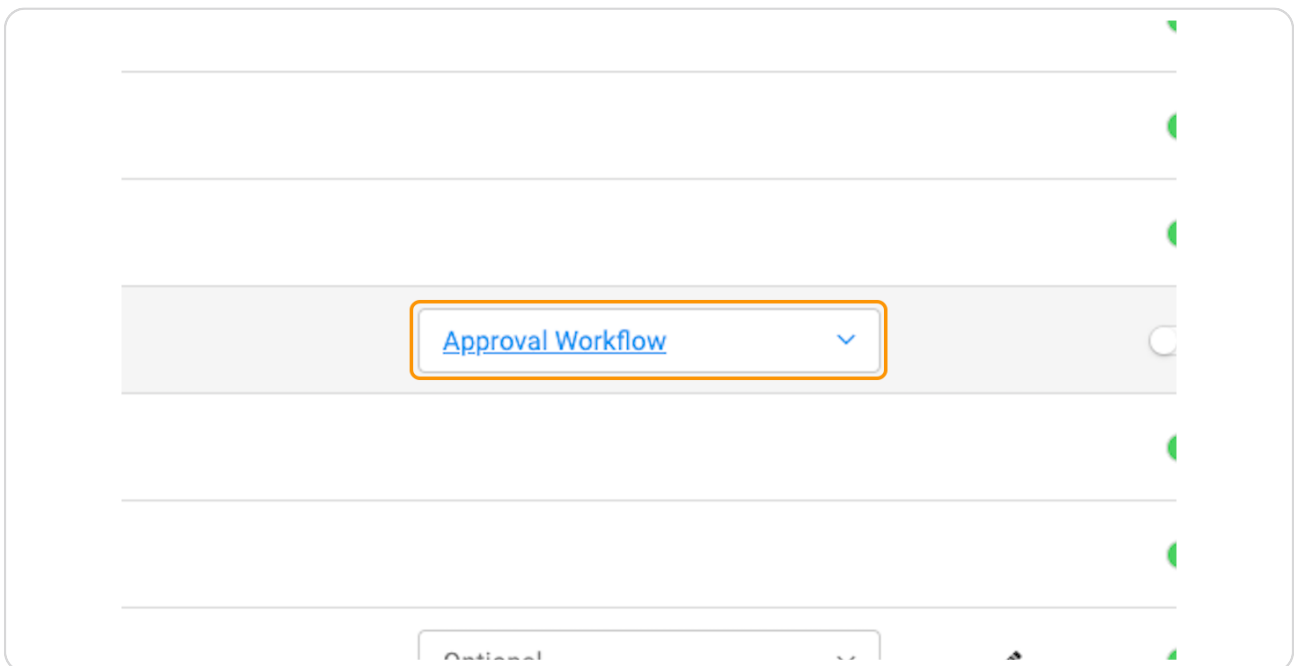
STEP 33

Click on Edit



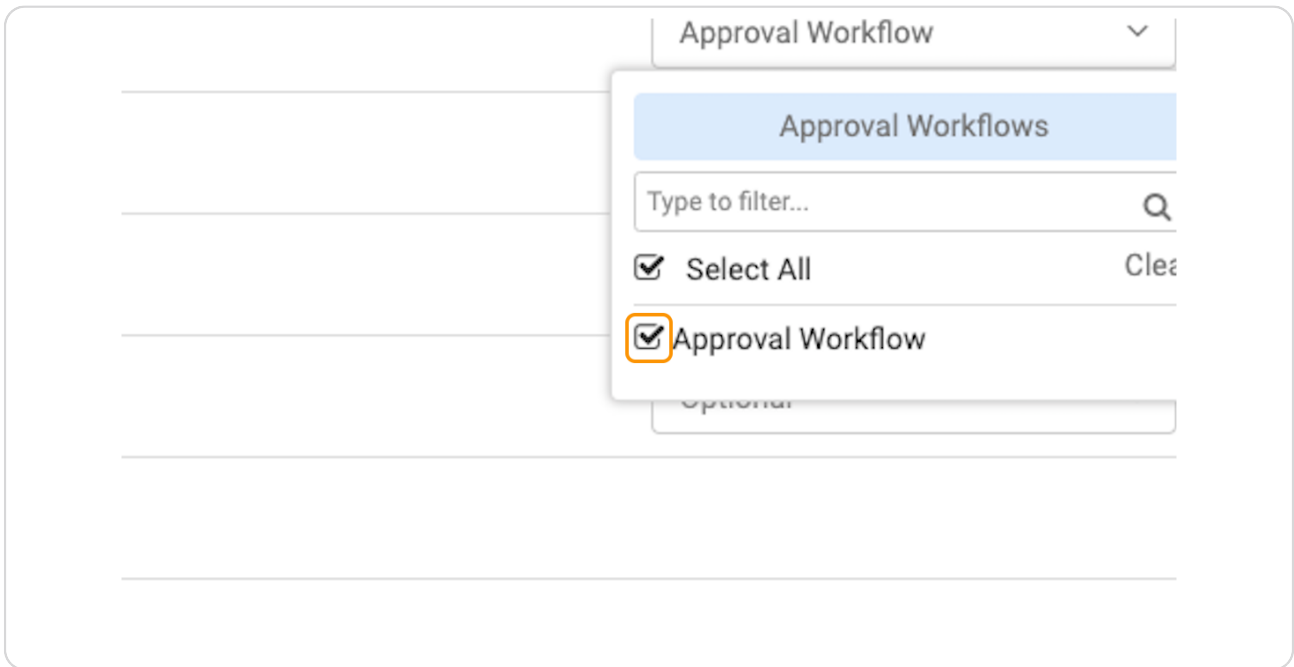
STEP 34

Click on the Approval Workflow dropdown



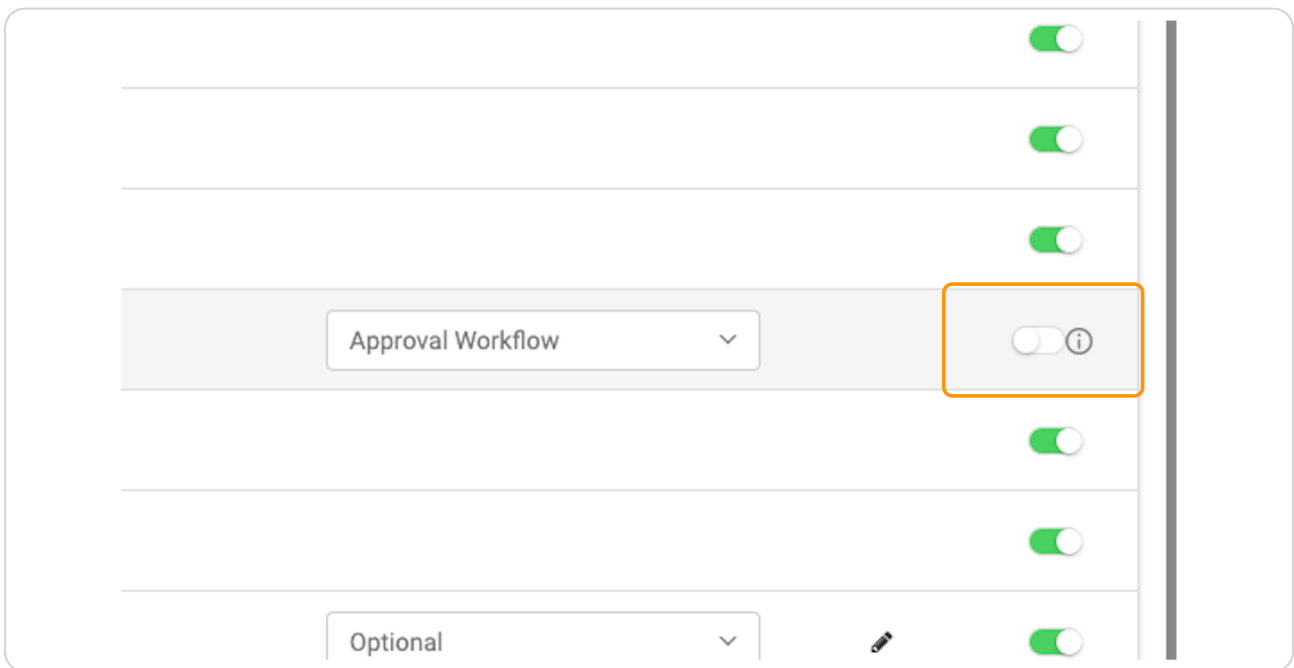
STEP 35

Select your Approval Workflow



STEP 36

Turn the toggle on



STEP 37

Click on Save

