

# RELEASE

# NOTES

## TASKS

|                      |   |
|----------------------|---|
| <b>Functionality</b> | Approval Steps Enhancements             |
| <b>Completed</b>     | Wireless Forms/Templates-<br>Properties |
| <b>Version</b>       | 21.07.23                                |

# Verified and Released On

26th July 2021, 27th July 2021

## Objectives

- **Approval Process creation enhancements**
  - **Assigned roles option for Pending state**
  - **Multiple roles association with a step**
  - **Actions - Add, Edit, Delete at any step**
  - **Change Steps Sequence**

## Steps – Approval Process creation

### enhancements

- Login to the portal with user role who can create the Approval Process
- Click on settings icon on the button of the side menu
- Select and click on Approval Process option
- Click on add plus icon button
- On Steps tab enter the required information

- Name
- Entity
- Description
- Enter Step details in the grid
  - Step Name
  - Roles(*API User, Admin, Company Sub Admin, Customer, Department Admin, Department Sub Admin, Driver, Form Users, Tester Role, Custom Roles*)
  - Allowed Actions(*Add, Edit, Delete*)
  - Email Address(to whom the information needs to be copied)
- Add Steps say Pending default prefilled after that say Approve and Reject steps added
- Select the Roles to whom the information will be notified.
- Select the allowed actions for respective step as required
- Click on Submit button
- On the next screen select the transition to be followed by selecting the steps on the respective state/step.
- Click on submit button to save the process
- User can edit and view the record
- While editing the process the pre saved will come prefilled and the user can update them accordingly as required.
- Here in this process users can change the sequence of the steps while creating or editing the process by dragging the step up and down as required.
- Create a new form template with the approval process.
- The further process after the form submission is same as before:
  - The users will be notified with the status emails.



# Add Approval Process

**Add Approval Flow**

Roles can not be blank

**Step Details**

Name: New Approval Wireless

Entity: Wireless Form

**Transitions Details**

Description: Wireless Approval Description

|  | Step Name | Roles         | Allowed Actions | Email Address | Action |
|--|-----------|---------------|-----------------|---------------|--------|
|  | Pending   | None selected | None selected   | Email         |        |

Buttons: Cancel, Submit

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**Add Approval Flow**

Name: New Approval Wireless

Entity: Wireless Form

Description: Wireless Approval Description

|  | Step Name | Roles  | Allowed Actions | Email Address | Action |
|--|-----------|--------|-----------------|---------------|--------|
|  | Pending   | Driver | None selected   | Email         |        |

Role Selection Menu:

- Select all
- API User
- Admin
- Company Sub Admin
- Customer
- Department Admin
- Department Sub Admin
- Driver
- Form Users
- Tester Role

Buttons: Cancel, Submit

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# Select Roles

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### Add Approval Flow

**Step Details**

**Name**  
New Approval Wireless

**Entity**  
Wireless Form

**Transitions Details**

**Description**  
Wireless Approval Description

|   | Step Name | Roles  | Allowed Actions | Email Address | Action |
|---|-----------|--------|-----------------|---------------|--------|
| ⋮ | Pending   | Driver | None selected   | Email         | 🗑️     |
| + |           |        |                 |               | +      |

Cancel Submit

✖ Minimum two approval steps required

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Type here to search 32°C 13:08 20-07-2021

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### Add Approval Flow

**Step Details**

**Name**  
New Approval Wireless

**Entity**  
Wireless Form

**Transitions Details**

**Description**  
Wireless Approval Description

|   | Step Name | Roles         | Allowed Actions | Email Address | Action |
|---|-----------|---------------|-----------------|---------------|--------|
| ⋮ | Pending   | Driver        | None selected   | Email         | 🗑️     |
| ⋮ | Step Name | None selected | None selected   | Email         | 🗑️     |
| + |           |               |                 |               | +      |

Cancel Submit

✖ Roles can not be blank

✖ Step name can not be blank

✖ Minimum two approval steps required

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**Add Approval Flow**

Please add at least two approval steps.

**Step Details**

Name:  Entity:  Description:

|  | Step Name                            | Roles                                      | Allowed Actions                            | Email Address                      | Action                        |
|--|--------------------------------------|--|--|------------------------------------|-------------------------------|
|  | <input type="text" value="Pending"/> | <input type="text" value="None selected"/> | <input type="text" value="None selected"/> | <input type="text" value="Email"/> | <input type="text" value=""/> |

Cancel Submit

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**Settings / Approval Process**

Approval transition steps added successfully

|                          | Name                 | Type          | Description                   | #Steps | Status |
|--------------------------|----------------------|---------------|-------------------------------|--------|--------|
| <input type="checkbox"/> | New Approval Process | WIRELESS FORM | Wireless Approval Description | 6      | Active |
| <input type="checkbox"/> | New Process          | WIRELESS FORM | Test                          | 3      | Active |
| <input type="checkbox"/> | test                 | WIRELESS FORM | test                          | 4      | Active |
| <input type="checkbox"/> | Approval Process     | WIRELESS FORM | TEst                          | 4      | Active |

Show  entries Showing 1 to 4 of 4 entries Previous **1** Next

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### Approval Process Added in List

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### Edit Approval Flow(New Approval Process)

**Step Details**

| Sl# | Step Name                        | Transitions  |
|-----|----------------------------------|--|
| 1   | Pending(Driver)                  | Review(Department Admin), Cancel(Admin,Company Sub Admin) ▾                        |
| 2   | Review(Department Admin)         | Review(Admin,Company Sub Admin), Reject(Admin), Approve(Admin,Company Sub Admin) ▾ |
| 3   | Cancel(Admin,Company Sub Admin)  | None selected ▾  |
| 4   | Review(Admin,Company Sub Admin)  | Reject(Admin), Approve(Admin,Company Sub Admin) ▾                                  |
| 5   | Reject(Admin)                    | Review(Admin,Company Sub Admin) ▾  |
| 6   | Approve(Admin,Company Sub Admin) | Review(Admin,Company Sub Admin) ▾  |

**Transitions Details**

Back Submit

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## Approval Transitions

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### View Approval Flow(New Approval Process)

**Step Details**

| Name                                      | New Approval Process | Entity | WIRELESS FORM |
|---|----------------------|--------|---------------|
| Description Wireless Approval Description |                      |        |               |

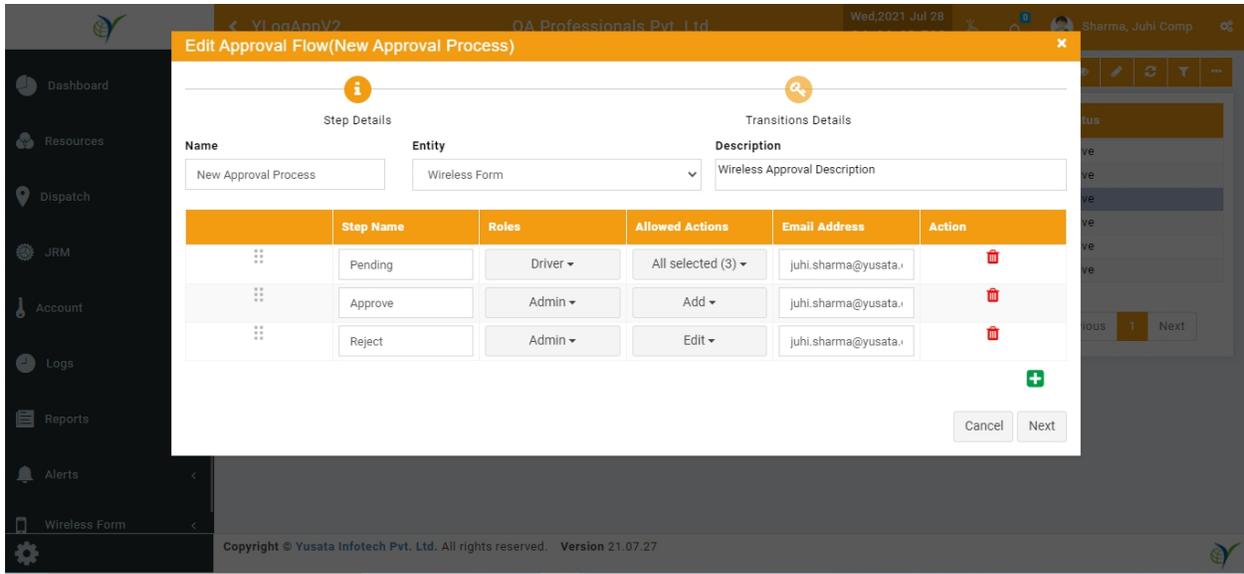
**Transitions Details**

| Sl# | Step Name | Roles                   | Allowed Actions | Email Address        |
|-----|-----------|-------------------------|-----------------|----------------------|
| 1   | Pending   | Driver                  | Add,Delete,Edit | sjuhi.2210@gmail.com |
| 2   | Review    | Department Admin        | Edit            | sjuhi.2210@gmail.com |
| 3   | Cancel    | Company Sub Admin,Admin | Delete          | sjuhi.2210@gmail.com |
| 4   | Review    | Company Sub Admin,Admin | Add,Delete,Edit | sjuhi.2210@gmail.com |
| 5   | Reject    | Admin                   | Edit            | sjuhi.2210@gmail.com |
| 6   | Approve   | Company Sub Admin,Admin | Add             | sjuhi.2210@gmail.com |

Close Next

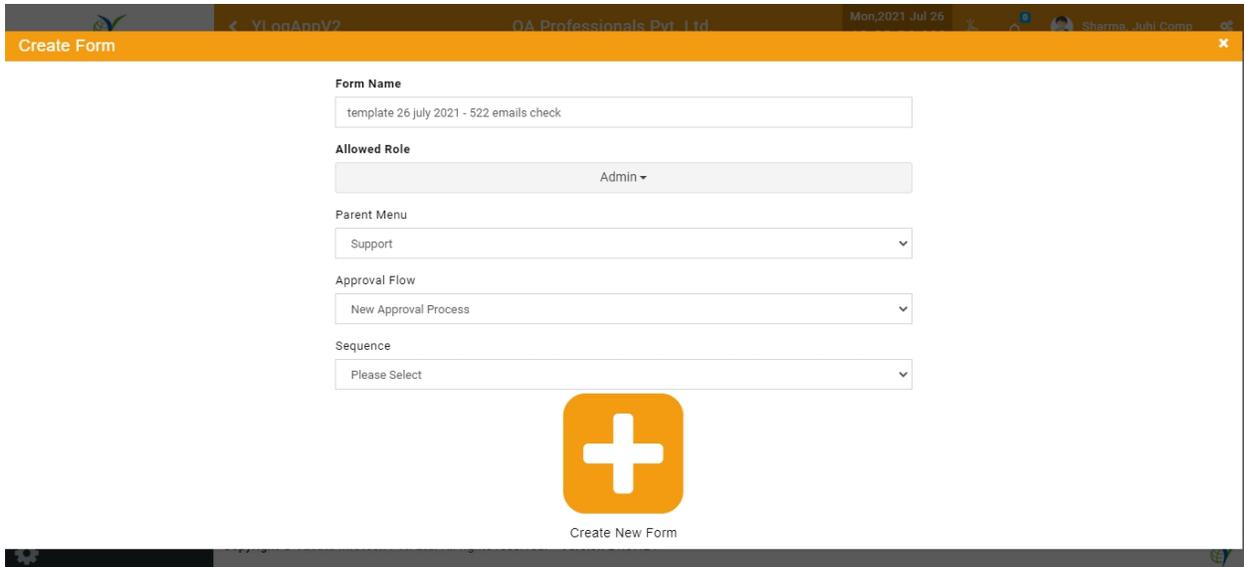
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## View Approval



### Edit Approval

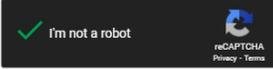
Note : Already created approval process can be updated for the new flow



### Create Form Template

template 26 july 2021 - 522 emails check 1

Single Line Text

**Submit Public Form**