

USER GUIDE

Approval

Provides features to deal with approvals required in various issues. You can not only make a draft of a document but also make report to and conduct approval process. Also, you can check approval history and make an announcement related to an approval in the past.

Managing Approval and Approval History

Following is how to manage approval and approval history with Approval Service.

1. Writing General Document

Approval - Report List

Following is how to write a new document, such as memorandum for expense account or request for day-off, on any issue which requires an approval.

1) Click the [Create Approval] button to write a new document for an approval.

The screenshot shows the 'Approval - Report List' interface. On the left, there is a sidebar with a 'Report List' section containing links for 'Postponed List', 'Pending List', 'Notified List', and 'Approved List'. The main area displays a table with columns: SERVICE, KEY, TITLE, TYPE, STATUS, SUBMIT DATE, APPROVED DATE, and APPROVER. The table is currently empty, showing 'No Data'. A red arrow points to the 'Create Approval' button located in the top bar of the table.

2) On the drop-down menu for 'Type', select 'General'. (General is the default value).

The screenshot shows the 'Create Approval' form. At the top, there is a 'Save to Postpone' button and 'Cancel' and 'Submit' buttons. The form has fields for 'Type *' and 'Title *'. The 'Type *' dropdown menu is open, showing 'General' as the selected option and 'Work' as another option. Below the form, there are radio buttons for 'Approval (0)', 'Consent (0)', 'Post-approval (0)', and 'Notification (0)'. A red arrow points to the 'Type' dropdown menu.

Type	Description
General	Means an approval document for a general issue.
Work	Means an acknowledgement for Release plan.

3) Enter the details required for an approval.

Create Approval

[Save to Postpone](#) [Cancel](#) [Submit](#)

Type * ① General ▾

Title * ②

Approver * ③

Total: 0

<input type="checkbox"/>	TYPE	ORDER	NAME	TITLE	COMPANY	TEAM	USER ID
No Data							

Description ④

Attaching File ⑤ * The maximum file size allowed is 10MB.

Submission Schedule ⑥ ☐ Configuration

[Cancel](#) [Submit](#)

No	Name	Required	Description
①	Type	Required	Select the type of a document. You can select either General or Work.
②	Title	Required	Enter the title of a document.
③	Approver	Required	You can set the Approver Group.
④	Description	.	You can write the text of an document required for an approval.
⑤	Attaching File	.	You can select attachments. If you click the [Attaching File] button, the file explorer is shown as the pop-up. Then you can select a file to be attached.
⑥	Submission Schedule	.	You can set a deadline of document submission. Click the [Configuration] checkbox to set a deadline in year/month/day/hour/minute.

4) Click the [Submit] button to submit a document. As the document has been submitted, members of the Approver Group are to receive a notification for a new approval document via e-mail.

Create Approval

Save to Postpone Cancel Submit

Type * General

Title *

Search

Approval (0) Consent (0) Post-approval (0) Notification (0)

Total: 0

Remove Up Down

TYPE	ORDER	NAME	TITLE	COMPANY	TEAM	USER ID
No Data						

Click

1.1 Setting Approver Group

You can set the Approver Group by designating the Approver, Consenter, Post-Approver and person to be notified.

1) Click the [Search] button of 'Approver'.

Create Approval

Save to Postpone Cancel Submit

Type * General

Title *

Search

Approval (0) Consent (0) Post-approval (0) Notification (0)

Total: 0

Remove Up Down

TYPE	ORDER	NAME	TITLE	COMPANY	TEAM	USER ID
No Data						

Click

2) On 'Member' of the "Search Approver" pop-up, select a member who is to be included in the Approver Group and click the [Selected Add] button. The 'Selected Member List' shows who are added to the Approver Group.

Search Approver

Members (30)

All Service Group

	NAME	TITLE	COMPANY	TEAM	USER ID	MEMBER
<input type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y
<input checked="" type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y
<input type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y
<input type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y
<input type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y

Select

Click

Add All Selected Add

Selected Member List (3)

	NAME	TITLE	COMPANY	TEAM	USER ID	MEMBER
<input checked="" type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y
<input type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y
<input type="checkbox"/>	김민준	팀장	주요사업부	팀장	kimminjun@seanglobal.com	Y

Cancel Save

3) Click the [Save] button.

Selected Member List (3)

<input type="checkbox"/>	NAME	TITLE	COMPANY	TEAM	USER ID	MEMBER
<input checked="" type="checkbox"/>	홍길동	Manager	ABC Corp	Product Management	honggil@company.com	Y
<input type="checkbox"/>	김철수		ABC Corp		kimcheol@company.com	Y
<input type="checkbox"/>	이영희		ABC Corp	QA	leejung@company.com	Y

Cancel

Save

4) Assign a role for each member added to the group. After selecting the member, select one of the following to assign a role: Approval, Consent, Post-Approval or Notification.

Create Approval

Save to Postpone

Cancel

Submit

Type *

General

Title *

② Select Role

Search

Approval (1)

☒ Consent (1)

Post-approval (0)

Notification (0)

Approver *

Total: 3

Remove

Up

Down

<input type="checkbox"/>	TYPE	ORDER	NAME	TITLE	COMPANY	TEAM	USER ID
<input checked="" type="checkbox"/>	Draft(1)	1	홍길동	Manager	ABC Corp	Product Management	honggil@company.com
<input type="checkbox"/>	Approve(2)	2	김철수		ABC Corp		kimcheol@company.com
<input type="checkbox"/>	Consent(3)		이영희		ABC Corp	QA	leejung@company.com

① Select User

Role	Description
Approval	Means the Approver of an approval document. The next approval may not proceed without an approval of the Approver.
Consent	Means the Consenter of an approval document. The next approval may not proceed without an approval of the Consenter.
Post-Approval	Means the Post-Approver of an approval document. The next approval may proceed without an approval of the Post-Approver. The Post-Approver can approve the document, but cannot reject it.
Notification	Means the person to be notified of an approval document. The person has no right to approve or reject a document, but just may refer to it.

5) Among members added to the list, set an order in which approvals are to be made. Click the [Up] and [Down] button to change the order.

Create Approval

Save to Postpone

Cancel

Submit

Type *

General

Title *

Search

Approval (1)

Consent (1)

Post-approval (0)

Notification (0)

Remove

Up

Down

Total: 3

	TYPE	ORDER	NAME	TITLE	COMPANY	TEAM	USER ID
<input type="checkbox"/>	Draft(1)	1	홍길동	홍길동	홍길동	홍길동	honggil@honggil.com
<input type="checkbox"/>	Approve(2)	2	김철수	김철수	김철수	김철수	kimcheol@kimcheol.com
<input type="checkbox"/>	Consent(3)	3	이민준	이민준	이민준	이민준	leeimin@leeimin.com

2. Approval Process

Following is how to check the submitted approval documents and how to approve/reject them.

2.1 My Document

Approval - Report List

1) Click the "Report List" menu to check the submitted documents. The Report List menu shows documents which you have written and whose approval process is in progress..

Approval

Configuration

Report List

Postponed List

Pending List

Notified List

Approved List

Create Approval

All Type

Search

1 Results

<< 1 of 1 >>

50

SERVICE	KEY	TITLE	TYPE	STATUS	SUBMIT DATE	APPROVED DATE	APPROVER
	General-00115	Travel expense report #6	General	Pending	2017/02/21 18:15:36		审批管理审批管理审批管理
	General-00114	Travel expense report #5	General	Pending	2017/02/21 18:15:36		审批管理审批管理审批管理
	General-00113	Travel expense report #4	General	Pending	2017/02/21 18:15:36		审批管理审批管理审批管理
	General-00112	Travel expense report #3	General	Pending	2017/02/21 18:15:36		审批管理审批管理审批管理
	General-00111	Travel expense report #2	General	Pending	2017/02/21 18:15:36		审批管理审批管理审批管理
	General-00110	Travel expense report #1	General	Pending	2017/02/21 18:15:36		审批管理审批管理审批管理

2) Click the document on the Report List menu to check its details. Also, you can check its approval status.

[General-00122] 5월 품의서에 대한 결재를 요청합니다.

List

APPROVAL DETAILS

Type

General

Title

5월 품의서에 대한 결재를 요청합니다.

Approver

TYPE	ORDER	STATUS	NAME	ID	APPROVAL TIME
Draft(1)	1	Approved	홍길동	honggil@honggil.com	2017/05/22 19:16:53
Approval(2)	2	Approved	김철수	kimcheol@kimcheol.com	2017/05/22 19:18:50
Notification(3)	3		이민준	leeimin@leeimin.com	

Comment

Approved

Description

5월 품의서에 대한 결재를 요청합니다.
구체적인 내용은 아근 식대 및 교통비입니다.

ATTACHMENT

Save

FILE NAME	DESCRIPTION	SIZE	UPLOAD DATE
No Data			

2.2 Document whose Approver or Consenter Is You

Approval - Pending List

1) Click the “Pending List” menu to check the submitted documents. The Pending List menu shows documents you are bound to approve or reject.

Approval

Report List
Postponed List
Pending List
Notified List
Approved List

Pending List

Create Approval

All Type

Search

Q

1 Result(s)

<<

1

>>

50

SERVICE	KEY	TITLE	TYPE	STATUS	SUBMIT DATE	CREATOR
	General-00111	Travel expense report #7	General	Pending	2017/02/22 19:04:40	이재민 (이재민@company.com)
	General-00111	Travel expense report #6	General	Pending	2017/02/22 19:04:40	이재민 (이재민@company.com)
	General-00111	Travel expense report #5	General	Pending	2017/02/22 19:04:40	이재민 (이재민@company.com)
	General-00111	Travel expense report #4	General	Pending	2017/02/22 19:04:40	이재민 (이재민@company.com)
	General-00111	Travel expense report #3	General	Pending	2017/02/22 19:04:40	이재민 (이재민@company.com)
	General-00111	Travel expense report #2	General	Pending	2017/02/22 19:04:40	이재민 (이재민@company.com)
	General-00111	Travel expense report #1	General	Pending	2017/02/22 19:04:40	이재민 (이재민@company.com)

2) Click the document to check its details.

[General-00122] 5월 품의서에 대한 결재를 요청합니다.

Reject

Approve

List

APPROVAL DETAILS

Type

General

Title

5월 품의서에 대한 결재를 요청합니다.

Approver

TYPE	ORDER	STATUS	NAME	ID	APPROVAL TIME
Draft(1)	1	Approved	이재민 (이재민@company.com)	이재민 (이재민@company.com)	2017/05/22 19:16:53
Approval(2)	2		이재민 (이재민@company.com)	이재민 (이재민@company.com)	
Notification(3)	3		이재민 (이재민@company.com)	이재민 (이재민@company.com)	

Description

5월 품의서에 대한 결재를 요청합니다.
구체적인 내용은 마군 식대 및 교통비입니다.

ATTACHMENT

FILE NAME

DESCRIPTION

SIZE

UPLOAD DATE

No Data

3) Click the [Reject] or [Approval] button to reject or approve the document.

[General-00122] 5월 품의서에 대한 결재를 요청합니다.

Reject

Approve

List

APPROVAL DETAILS

Type

General

Title

5월 품의서에 대한 결재를 요청합니다.

Approver

TYPE	ORDER	STATUS	NAME	ID	APPROVAL TIME
Draft(1)	1	Approved	이재민 (이재민@company.com)	이재민 (이재민@company.com)	2017/05/22 19:16:53
Approval(2)	2		이재민 (이재민@company.com)	이재민 (이재민@company.com)	
Notification(3)	3		이재민 (이재민@company.com)	이재민 (이재민@company.com)	

Description

5월 품의서에 대한 결재를 요청합니다.
구체적인 내용은 마군 식대 및 교통비입니다.

ATTACHMENT

FILE NAME

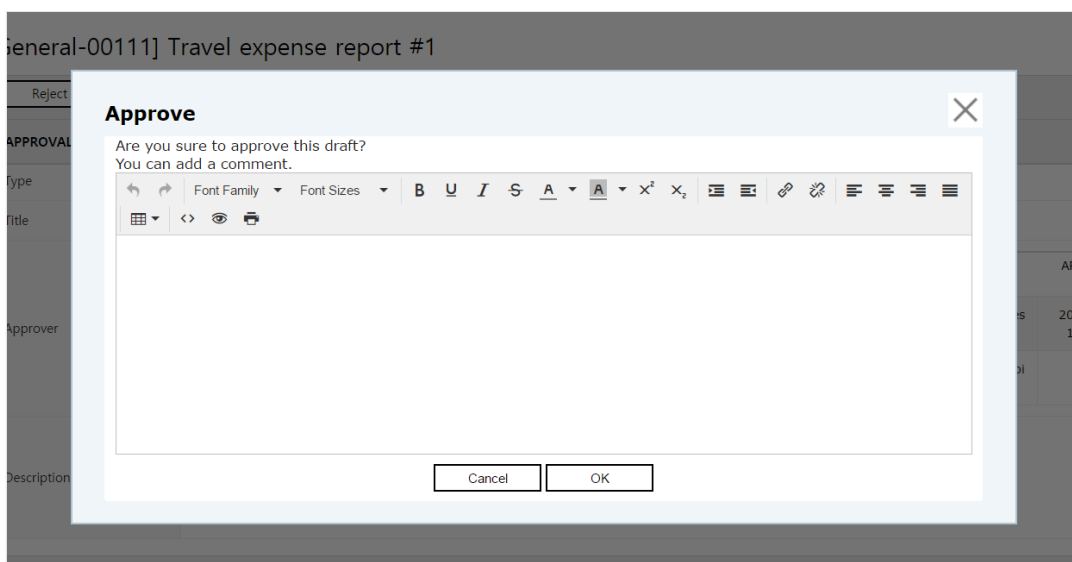
DESCRIPTION

SIZE

UPLOAD DATE

No Data

4) As you click the [Reject] or [Approval] button, the “Approval” or “Reject” pop-up appears respectively. You can write the reason for your approval/rejection. After writing the reason, click the [OK] button to complete it.



5) A document whose Approver Group has finished the process for either approval or rejection is shown on the “Approved List”. Click a document on the Approved List to check its approval history.

[General-00122] 5월 품의서에 대한 결재를 요청합니다.

List

APPROVAL DETAILS						
Type	General					
Title	5월 품의서에 대한 결재를 요청합니다.					
Approver	TYPE	ORDER	STATUS	NAME	ID	APPROVAL TIME
	Draft(1)	1	Approved	김민준 (김민준@general.com)	id@general.com	2017/05/22 19:16:53
	Approval(2)	2	Approved	김민준 (김민준@general.com)	id@general.com	2017/05/22 19:18:50
	Comment Approved					
	Notification(3)	3		김민준 (김민준@general.com)	id@general.com	
Description	5월 품의서에 대한 결재를 요청합니다. 구체적인 내용은 아군 식대 및 교통비입니다.					
ATTACHMENT						
FILE NAME	DESCRIPTION	SIZE	UPLOAD DATE			
No Data						

Save

2.3 Document for which You Are to Be Notified

Approval - Notified List

If you are the person to be notified of a document, the document is to be indicated on the “Notified List” as it is fully approved. Click the “Notified List” to check the approved document for which you are one of persons to be notified.

3. Searching Approval History

Approval

You can search documents on each menu in accordance with their approval status.

- Report List: These are documents you have written.
- Postponed List: These are documents you are currently writing.
- Pending List: These are documents for which you are the Approver or Consenter. Their approval process is in progress.
- Notified List: These are documents for which you are the person to be notified. Their approval process is completed.
- Approved List: These are documents you have approved or consented to.

How to search documents is identical on all menus.

1) Select "Type" of the document you want to search for.

Approval

Configuration

Report List

Postponed List

Pending List

Notified List

Approved List

Create Approval

Report List

All Type

Select all

General

Ok

Search

2 Result(s)

1

of 1

50

SERVICE	KEY	TITLE	TYPE	STATUS	SUBMIT DATE	APPROVED DATE	APPROVER
General-00110	General-00110	Travel expense report	General	Pending	2017/02/21 18:15:36		
General-00115	General-00115	Template example	General	Pending	2017/02/23 09:58:07		

2) Enter a keyword for search.

Approval

Configuration

Report List

Postponed List

Pending List

Notified List

Approved List

Create Approval

Report List

All Type

travel

Search

2 Result(s)

1

of 1

50

SERVICE	KEY	TITLE	TYPE	STATUS	SUBMIT DATE	APPROVED DATE	APPROVER
General-00110	General-00110	Travel expense report	General	Pending	2017/02/21 18:15:36		
General-00115	General-00115	Template example	General	Pending	2017/02/23 09:58:07		

3) Documents which are identical to the selected Type and keyword will be shown on the list. Texts identical to the keyword will be highlighted.

Approval

Configuration

Report List

Postponed List

Pending List

Notified List

Approved List

Create Approval

Report List

All Type

travel

Search

2 Result(s)

1

of 1

50

SERVICE	KEY	TITLE	TYPE	STATUS	SUBMIT DATE	APPROVED DATE	APPROVER
General-00110	General-00110	Travel expense report	General	Pending	2017/02/21 18:15:36		
General-00115	General-00115	Template example	General	Pending	2017/02/23 09:58:07		