

# Approval Workflow Guide

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## Overview

The Genesis Provenance approval workflow enables multi-step approval processes for luxury assets. This allows team members to request reviews, authenticity checks, and verifications from designated approvers before assets are marked as verified.

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## How the Approval Workflow Works

### 1. Approval Request Creation

Any team member can request an approval for an asset by:

1. **Navigate to Asset:** Go to `/vault/[id]` (asset detail page)
2. **Open Approvals Tab:** Click on the “Approvals” tab
3. **Click “Request Approval”**
4. **Fill out the request form:**
  - **Approval Type:** Select from:
    - Asset Verification
    - Authenticity Check
    - Value Assessment
    - Condition Review
    - Ownership Transfer
    - Documentation Review
    - Other
  - **Priority:** Low, Medium, High, or Urgent
  - **Request Notes:** Explain what needs to be reviewed
  - **Required Role:** (Optional) Specify which role can approve (Owner, Admin, Editor, Viewer)
  - **Specific Approver:** (Optional) Assign to a specific team member
  - **Due Date:** (Optional) Set a deadline

### 2. Notification System

When an approval request is created:

- **Notifications are sent to:**
  - The specific approver (if assigned)
  - All team members with the required role (if no specific approver)
  - All admins/owners (if no restrictions)
- **Notifications appear** in the bell icon on the dashboard top bar
- **Approval requests show as “Pending”** in the asset’s Approvals tab

### 3. Approval Response

Eligible approvers can respond to pending requests:

## Who Can Approve?

- The specific user assigned as approver
- Any user with the required role or higher
- Owners and admins can approve anything
- The requester **cannot** approve their own request

## Response Options:

- **Approve:** Accept the request
- **Reject:** Deny the request
- **Cancel:** (Requester only) Cancel the request

## Response Process:

1. Click on the pending approval in the Approvals tab
2. Click “Respond to Approval”
3. Select “Approve” or “Reject”
4. Add response notes (optional but recommended)
5. **Important:** Check “Update item status to verified” if:
  - The approval type is “Asset Verification” or “Authenticity Check”
  - You want the asset to be marked as verified upon approval

## 4. Status Updates - The Key to Verification

### This is the critical part:

### When “Pending Review” Becomes “Verified”

An asset's status changes from “Pending Review” to “Verified” when:

1. **An approval request is created** with type:
  - “Asset Verification” OR
  - “Authenticity Check”
2. **An authorized approver responds** with “Approved”
3. **The approver checks the box:** “Update item status to verified”

### Example Workflow:

```

Asset Status: Pending Review
  ↓
User requests "Asset Verification" approval
  ↓
Admin/Approver reviews the asset
  ↓
Approver clicks "Approve" AND checks "Update item status to verified"
  ↓
Asset Status: Verified ✓
  
```

### Important Notes:

- If the approver **doesn't check** “Update item status to verified”, the asset status remains unchanged
- Only “Asset Verification” and “Authenticity Check” approval types can change status to verified
- Other approval types (Value Assessment, Condition Review, etc.) do NOT automatically change the asset status

## 5. After Approval

Once an approval is processed:

- **✓ Status updates:** The approval shows as “Approved”, “Rejected”, or “Cancelled”
  - **✓ Notifications sent:** The requester receives a notification about the outcome
  - **✓ Provenance event created:** A “reviewed” event is added to the asset’s timeline
  - **✓ Item status updated:** (If “Update item status” was checked and approval type was verification/authenticity)
  - **✓ Approval history:** All approvals are permanently recorded in the asset’s history
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## 🎯 Common Use Cases

### Use Case 1: Initial Asset Verification

**Scenario:** A collector adds a new luxury watch and wants it verified.

1. **Collector uploads** the watch with photos and documentation
2. **Asset is created** with status “Pending Review”
3. **Collector requests** an “Asset Verification” approval
4. **Assigns it** to the organization’s admin/expert
5. **Admin reviews** the asset, photos, and documentation
6. **Admin approves** the request and **checks “Update item status to verified”**
7. **Asset status changes** to “Verified” ✓
8. **Asset is now** trusted and can be included in reports

### Use Case 2: Authenticity Check for High-Value Item

**Scenario:** A dealer wants a second opinion on a \$50k item.

1. **Dealer has** an asset marked as “Verified”
2. **Dealer requests** an “Authenticity Check” approval
3. **Sets priority** to “High” and adds detailed notes
4. **Assigns to** a specific team member with expertise
5. **Expert reviews** and may request additional photos via comments
6. **Expert approves** and **checks “Update item status to verified”** (reconfirms verification)
7. **Approval is recorded** in the provenance timeline

### Use Case 3: Pre-Sale Condition Review

**Scenario:** Before selling an asset, an owner wants a condition review.

1. **Owner requests** a “Condition Review” approval
  2. **Sets due date** for 7 days before the planned sale
  3. **Assigns to** an editor with required role “Editor”
  4. **Editor provides** detailed condition notes in the response
  5. **Editor approves** (does **not** check “Update item status” - not applicable)
  6. **Asset status** remains “Verified”
  7. **Condition review** is documented in approval history
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## Permission Levels

### Requester Permissions

- Can create approval requests for any asset in their organization
- Can cancel their own pending requests
- Cannot approve their own requests

### Approver Permissions

- Can approve/reject if they are the assigned approver
- Can approve/reject if they have the required role
- Owners and admins can approve any request
- Cannot approve requests from themselves

### Role Hierarchy (for required roles)

```

Owner (highest)
  ↓
Admin
  ↓
Editor
  ↓
Viewer (lowest)

```

If a request requires “Editor” role, both Editors, Admins, and Owners can approve it.

## Approval Status Reference

Status	Icon	Description	Actions Available
Pending	 Clock	Awaiting approval	Approve, Reject, Cancel (requester)
Approved	 Check	Request was approved	View details, Response notes
Rejected	 X	Request was rejected	View details, Response notes
Cancelled	 Alert	Requester cancelled	View details

## Step-by-Step: Making an Asset “Verified”

### Starting Point: Asset is “Pending Review”

#### Step 1: Request Verification Approval

1. Go to asset detail page (/vault/[asset-id])
2. Click "Approvals" tab
3. Click "Request Approval" button
4. Select approval type: "Asset Verification"
5. Set priority (e.g., "Medium")
6. Add request notes: "Please verify authenticity and documentation"
7. (Optional) Assign to specific team member
8. Click "Submit Request"

### Step 2: Approver Reviews Asset

1. Approver receives **notification**
2. Approver navigates **to** asset
3. Reviews:
  - Photos **and** media
  - Provenance timeline
  - AI authentication results (**if** any)
  - VIN/serial number
  - Documentation

### Step 3: Approver Approves Request

1. In Approvals **tab**, click pending approval
2. Click "**Respond to Approval**"
3. Select "**Approve**"
4. Add response **notes**: "Verified based on documentation and AI analysis"
5.  Check "**Update item status to verified**" ↪ **CRITICAL STEP**
6. Click "**Submit Response**"

### Step 4: Asset is Now Verified

- Asset status: "Verified"
- Green badge shows in vault
- Approval recorded in history
- Provenance event created
- Requester notified

## ⚙️ API Endpoints

### Create Approval Request

POST /api/items/[id]/approvals

**Body:**

```
{
  "approvalType": "verification",
  "priority": "medium",
  "requestNotes": "Please verify this asset",
  "requiredRole": "admin", // optional
  "approverUserId": "user-id", // optional
  "dueDate": "2024-12-31" // optional
}
```

## Respond to Approval

```
PATCH /api/items/[id]/approvals/[approvalId]
```

**Body:**

```
{
  "status": "approved", // or "rejected" or "cancelled"
  "responseNotes": "Asset verified",
  "updateItemStatus": true // Set to true to update item status
}
```

## Get All Approvals for Item

```
GET /api/items/[id]/approvals
```

**Response:**

```
{
  "approvals": [
    {
      "id": "...",
      "approvalType": "verification",
      "status": "pending",
      "priority": "medium",
      "requestedBy": { "fullName": "John Doe" },
      "canApprove": true // Dynamic based on current user
    }
  ]
}
```



## Troubleshooting

### Issue: “I approved the request but the asset is still ‘Pending Review’”

**Solution:**

- Make sure you **checked the box** “Update item status to verified” when approving
- Verify the approval type was “Asset Verification” or “Authenticity Check”
- Other approval types do not automatically change the asset status

### Issue: “I can’t see the approval request”

**Solution:**

- Check if you have the required role or are the assigned approver
- Navigate to the asset’s detail page → Approvals tab
- Check your notifications (bell icon) for approval requests

### Issue: “I can’t approve my own request”

**Solution:**

- This is by design for security and accountability
- Assign the approval to another team member
- Ask an admin/owner to approve it

## Issue: “The ‘Respond to Approval’ button is disabled”

### Possible reasons:

- The approval is already processed (approved/rejected)
  - You are the requester (cannot approve own request)
  - You don't have the required role
  - You are not the assigned approver
- 



## Best Practices

### For Requesters

1. **✓ Be specific** in request notes - explain what needs verification
2. **✓ Set appropriate priority** - urgent for time-sensitive matters
3. **✓ Assign to experts** - use specific approvers for specialized items
4. **✓ Set due dates** - especially for pre-sale verifications
5. **✓ Add comments** if approver requests more information

### For Approvers

1. **✓ Review thoroughly** - check all photos, documents, and AI results
2. **✓ Add detailed response notes** - future reference and audit trail
3. **✓ Check “Update status”** when verifying assets (for verification types)
4. **✓ Request more info** via comments if needed before approving
5. **✓ Act promptly** on urgent and high-priority requests

### For Organizations

1. **✓ Define clear approval types** for your workflow
  2. **✓ Assign roles appropriately** - ensure qualified approvers
  3. **✓ Use required roles** for consistency (e.g., “Admin” for verifications)
  4. **✓ Monitor pending approvals** regularly
  5. **✓ Train team** on when to use each approval type
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## Summary

### The Complete Verification Flow:

```

Asset Created (Pending Review)
↓
Request "Asset Verification" Approval
↓
Assign to Approver (or Role)
↓
Approver Reviews Asset
↓
Approver Approves + Checks "Update Status"
↓
Asset Status → Verified ✓
↓
Asset Shows Green Badge in Vault

```

### Key Takeaways:

1. Approval requests enable structured review processes
2. Multiple approval types support different workflows
3. "Asset Verification" and "Authenticity Check" can update status
4. Must check "Update item status" box when approving
5. All approvals are permanently recorded in provenance
6. Role-based permissions ensure proper authorization
7. Notifications keep team informed of approval status

## Related Documentation

- [Team Management Guide](#) (/TEAM\_MANAGEMENT\_GUIDE.md)
- [Collaboration Features](#) (/COLLABORATION\_FEATURES\_COMPLETE.md)
- [Phase 3B Roadmap](#) (/PHASE\_3B\_ROADMAP.md)
- [Notification System](#) (/NOTIFICATION\_SYSTEM\_GUIDE.md)

### Questions or Issues?

If you encounter any problems with the approval workflow, check the troubleshooting section above or contact your organization administrator.