

## Configure Approvals

As an administrator, you can configure approvals. You define the entity, event, and condition based on which a notification is sent to the approvers.

### Procedure

1. Go to your user menu and select **Settings All Settings Business Flow Approval**.
2. Choose **+ New**. You can see a list of approvals that are available.
3. Enter a name in the **Process Name** field.
4. Select your language and enter subject and description in the **Task subject** and **Task Description** fields.
5. From the **Entities** dropdown, select an entity.

### Note

Approvals are available only for **Case**.

6. Select the **Event Type**.

### Note

You can add multiple approval steps using the **Add** button and configure conditions and approval for each step.

7. Optional: Define conditions to specify criteria that must be fulfilled to trigger approvals.

Conditions can be based on standard fields or extension fields.

You can define more than one conditions using logical operators **AND/OR**. Use the **AND** operator to define conditions within the same group. To add more than one condition, use the **OR** operator. Add a new group to define the **OR** operator amongst the approval conditions such that if conditions in at least one group are met, then the overall condition is considered fulfilled and the approval process is triggered.

- a. Choose **+OR Condition**. By default, the trigger is set to **Conditions are met**. While using operands, the first condition can only be defined using the **AND** operand.
- b. Select the field, comparator and the value or field. When previous value and current value influence the action, choose **Previous value** to consider the value before the event occurred.
- c. Specify an appropriate operator, and a value.

### Note

You can also create conditions using custom fields. Set up custom fields before you create autoflow rules.

- d. If desired, specify conditions with the following options:

- To add an **AND** expression, click the **Add** icon (🔍).

Conditions within a group are logical **AND** expressions. If all the conditions within a group are met, the condition group is considered fulfilled.

- To add an **OR** expression, click **+ OR Condition**.

If all conditions in at least one group are met, then the overall condition for the rule is considered fulfilled.

- To delete a condition group, click the **Delete** icon (🗑).
- To remove a condition, click the **Dismiss** icon (🗑).

#### 8. Set up the approval.

- To enable email notifications for approvals, select **Enable Email Notifications**.

#### Note

Your administrator must define email templates for **Approval Request** and **Approval Response** template types for **Case** object type. For more details on defining templates, see Related information.

- Select the **Approval Request** and **Approval Response** templates.
- In the **Define Work Distribution** section, define the approvers. You can choose from the following options:
    - **Direct Approvers:** You can select specific employees responsible as direct approvers, provided that they possess the corresponding access rights to the task type and business transaction. Such approvers also require read access to the relevant business transaction data and write access to the notes of the business transaction.

#### Note

You can enable approvers to trigger actions directly from the details of the item to be approved. To do so, from the **Approval** tab of any related item, make the **Actions** column visible on the user interface.

- **Responsibles:** You can select any responsible employees associated with the Approval. It can include **Processor of case**, **Manager of processor for case**, **Suggested recipients** and so on.

#### Note

- To include multiple approvers, enable the **All Approvals Required** toggle button. However, sequential approval is not supported.
- To enable automatic approval of your business process (only when there are no approvers determined for a step), turn on the **Automatic Approval** switch.

#### 9. Choose **Save** and **Activate**.

You can select the approvals that you define here in the **Approval** step type of **Case** designer.