Apet®360Pro™ Procurement Portal
User Guide 35

Setting up Work-flow Approval (pre-publishing approval)

Overview

This User Guide describes the steps to create pre-publishing approval in *360Pro* and *360Pro Adcom-enabled* accounts. If a work-flow approval process is required before a Job is published, Users can assign "Approvers" to their Jobs. This will enable an approval process where a Job needs to undergo one (or two) stage approval within 360Pro before it can be published. This functionality is switched <u>off</u> in System by default.

Approvers have read-only access to ALL Job details (they cannot add, edit, or delete any aspects of the Job).

Approvers have to been set up as a Job Manager (that so they can view the Job Management page), But the Approver cannot be the Job Manager for the Job they have been selected to approve.

Please note, by default, Boss users can approve a Job without being selected as the Approver; however, only the Users who have been assigned as Approvers will receive the Job requires publish request email from 360Pro.

For *360Pro* accounts, Bosses can set up a one stage approval process when the check the box for '*Job Publishing requires approval*' in System. This will enable a one-stage approval process to be triggered for all Jobs. To set a default Approver, click on Users within System and select the User.

For *360Pro Adcom* accounts, Bosses can set up a one or two stage approval process when the check the box for '*Some Jobs require second (higher level) approval*' in System. This will enable a one or two stage approval process to be triggered for all Jobs in the account, as shown in the work-flow diagram beside.
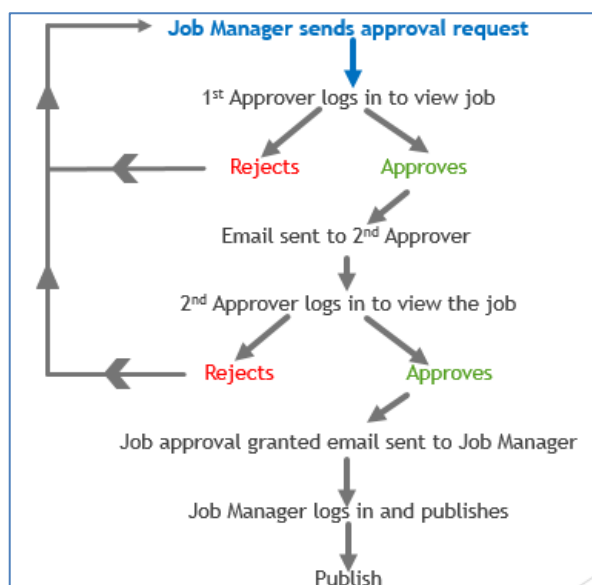

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Figure 1 Two-stage approval process

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Setting up "Approval" functionality

Boss to configure System settings
1. On the Job settings tab, select '*Job Publishing requires approval*' OR '*Some Jobs require second (higher level) approval*' checkbox
2. 'Default' Approvers can be assigned via the User tab in System
3. The text within the following email templates can be customized (and the following tags are included in the address line #APPROVER1#, #APPROVER2#, #MANAGER#):
    *   Job approval request email
    *   Job approval rejected email
    *   Secondary Job approval required email*
    *   Secondary Job approval granted email*
    *   Job approval granted email

*please note #APPROVER2# and *Secondary Job approval required* email and *Secondary Job approval granted* email are only available options when '*Some Jobs require second (higher level) approval*' has been selected.

Obtaining Approval to Publish:

For **360Pro** accounts, where Bosses have switched on 'Job Publishing requires approval' in System:
1. Via the tuxedo icon, the Approver(s) need to be assigned to the Job. The Approver cannot be the same User as the Job Manager for the Job they're assigned to Approve.
2. When the Job is ready to 'review and publish' (i.e. traffic light is amber) the Job Manager clicks on the 'Review and Publish' link, scrolls to the bottom of the page and clicks "Send Approval Request". The date and time this approval request was sent is displayed at the top of the Review and Publish view (and captured in the Audit report).
3. The User assigned as an 'Approver' will receive the Job Approval request email with instructions to log into 360Pro and either reject or approve for second/final round of pre-publishing approval.
4. If the Job passes pre-publishing approval, the Job Manager receives a Job Approval granted email and is able to publish their Job via the Review and Publish link.
5. If the Job Manager changes anything during the Approval process or after the Job has been given approval, the Approval process must start back again (step 2 above).
6. If the Approver reject the pre-publishing approval, the Job Manager is notified by email and after changes have been made, the Approval process starts again (step 2 above).

For **360Pro Adcom** accounts, where Bosses have switched on '*Some Jobs require second (higher level) approval*' in System:
1. Via the tuxedo icon, the Approver(s) need to be assigned to the Job. The 1st and 2nd Approver cannot be the same user and the Approver(s) cannot be the same User as the Job Manager for the Job they're assigned to Approve. Please Note: it is not mandatory to select a 2nd Approver.
2. When the Job is ready to 'review and publish' (i.e. traffic light is amber) the Job Manager clicks on the 'Review and Publish' link, scrolls to the bottom of the page and clicks "Send Approval Request". The date and time this approval request was sent is displayed at the top of the Review and Publish view (and captured in the Audit report).
3. The User assigned as the '1st Approver' will receive the Job Approval request email with instructions to log into 360Pro and either reject or approve for second/final round of pre-publishing approval.

4. If passed the first round of approval, the User assigned as a '2nd Approver' receives the 'Job Approval request email' with instructions to log in and approve or reject for publishing. The Job Manager also receives an email advising them the Job has passed first approval.

5. If the Job passes the second round of pre-publishing approval, the Job Manager receives a Job Approval granted email and is able to publish their Job via the Review and Publish link.

6. If the Job Manager changes anything during the Approval process or after the Job has been given final approval, the Approval process must start back again (step 2 above).

7. If the Approver(s) reject the pre-publishing approval at any stage (first or second stage), the Job Manager is notified by email and after changes have been made, the Approval process starts again (step 2 above).

Reporting

The Job Info page, Job Listing Report, Audit Report, and the Evaluation plus Risk Report will include Approver names and approval/rejection dates.