# Approvals

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# F2 Approvals

The F2 Approvals module provides a fast and easy way of quality assuring work using an efficient and effective approval flow. This module aims to simplify the process of approving material. Approvals also helps an organisation ensure that its formal approval processes are kept.

You define the flow of the approval process from start till final approval. This includes specifying anyone who must approve your work and any copy recipients who should be notified of the approval. A range of special columns and icons provides you with a graphical overview of the organisation's approvals and their current status.

## The approval flow

Create an approval from either the main window or the record window.

From here you can set up the approval flow by adding approvers and copy recipients on each step of the approval. You can also save a template based on the approval flow.

Approvers have several options for managing the approval, including returning or undoing the approval.

The approval process ends when the last approver grants final approval.

## Get an overview of approvals

You can get an overview of active approvals in F2 from the "Approvals" standard search. The approval columns can provide you with information, such as the approval's current location in the approval flow.

The approval icons provide information regarding the deadline of the approval and its movement through the approval flow, i.e. whether it has been returned or finally approved.

# Create new approvals

An approval is a structured process initiated by a user. The user who creates and starts the approval process is specified as the person responsible for the approval. The foundation of the approval is the approval record, which is automatically created when a new approval is created.

There are three ways of creating an approval:

- Creating an approval record in F2's main or case window.
- Creating a new record and then attaching an approval process.
- Adding an approval to an existing record in the record window.

In all cases, the record becomes an approval record and an approval document is added supplementary to the record document.

## Who can create approval flows?

By default, all F2 users can start an approval and define which user(s) should approve the attached material, which users should be oriented about the approval, and set a deadline for the approval. If needed, an approval template can be configured so that all approvals follow a fixed flow.

A secretariat or similar can act as a gatekeeper and manage approvals on behalf of a gated approver. Read more in F2 Gateway Approvals.

## Roles in approval flows

An approval contains two main roles:

- The responsible user: The person who initiates the approval.
- The approver: One or more persons who are to approve the submitted material.

Each approver is linked to a step in the approval process and can carry out the following approval actions:

- Approve
- Return, including conditional approval.

It is possible to add comments, and the approver can manage the approval process by either returning or conditionally approving. If the approver on a given step decides to return the approval, they can suggest on which step to resume the process. This allows the approver to take control of the approval process.

## Creating an approval via the main window

To create an approval in the main or case window, click on **New approval** in the ribbon.

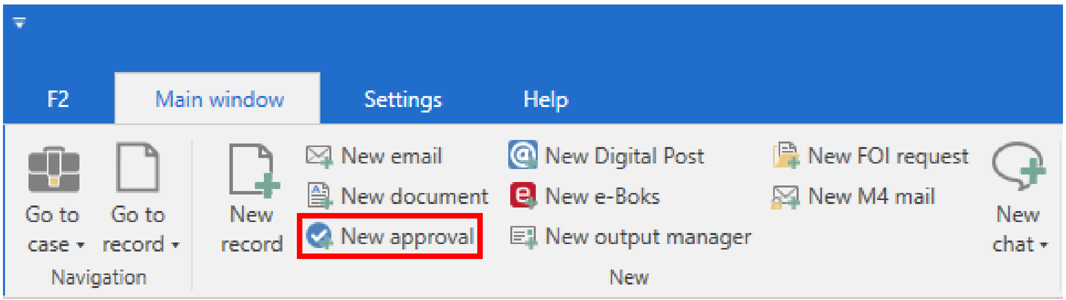



*Figure 1. The “New approval” menu item in the main window*

Click on **New approval** to open the “New approval” dialogue.

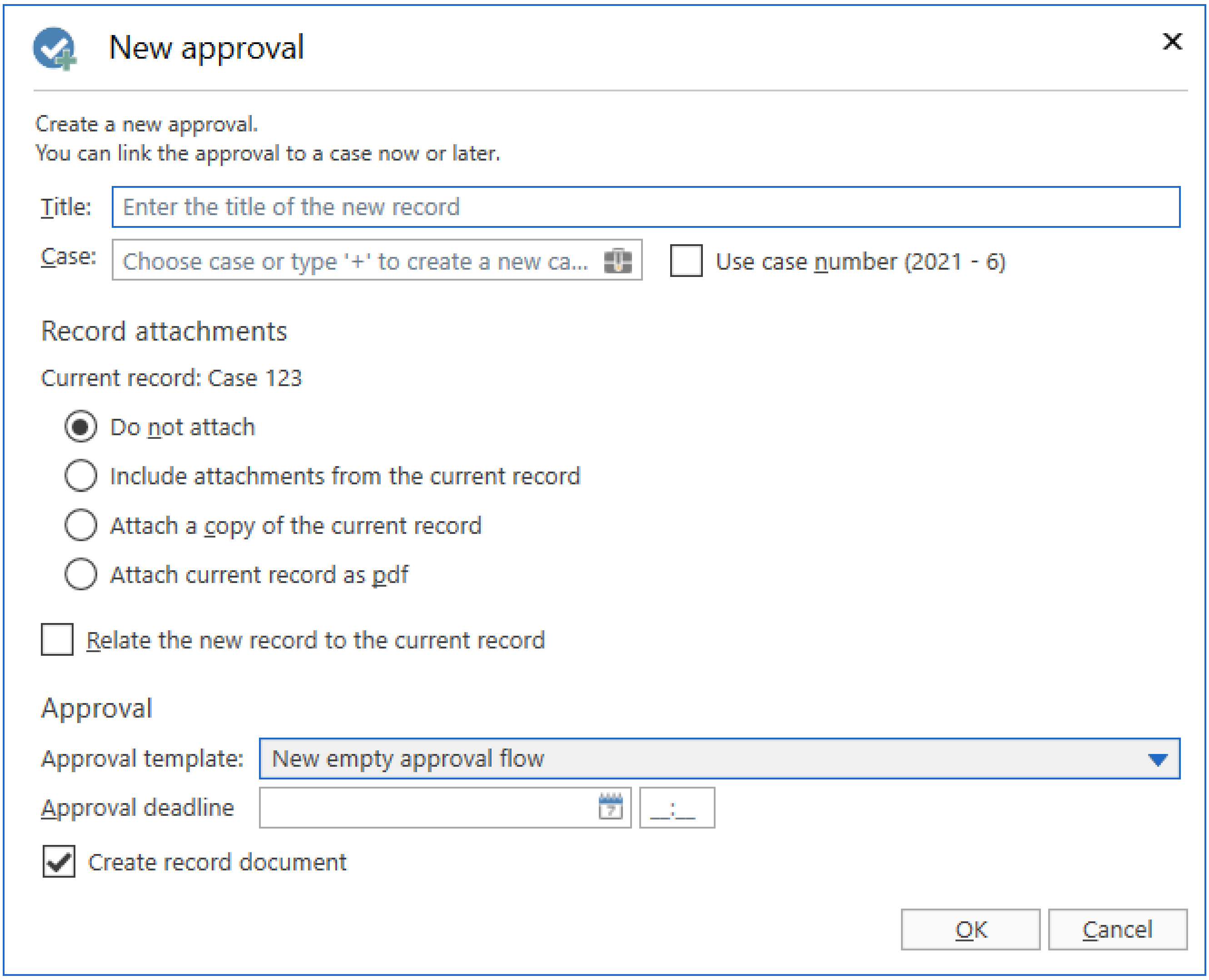



*Figure 2. Create new approval*

Fill in the following metadata in the dialogue:

| Function | Description |
|---|---|
| “Title” | Specify the title of the record on which the approval is created. |
| “Case” | Choose whether the approval record should be attached to a new or an existing case. |
| “Record attachments” | Select how to handle attachments for the record selected in the main window. |
| “Relate the new record to the current record” | Tick this field to create the new approval record as an answer record to the record selected in the main window. |
| “Approval template” | Choose between an approval template (pre-defined) or a “New empty approval flow”.<br><br>Read more about approval templates.<br><br>**NOTE** When configuring F2 it is possible to give users the option to select “New empty approval flow”. |
| “Approval deadline” | If applicable, set a deadline for the approval.<br><br>If an answer record to a request is created as an approval, the request’s internal deadline will be suggested as the approval and record deadline. |
| “Create record document” | If this box is unticked, the approval will be created without a record document.<br><br>**NOTE** An approval without an approval document cannot be sent as an email. An approval document must be created before it is possible to send the approval. Read more about this in the section The record document.<br><br>When configuring F2 the organisation can choose which options are available to the user when creating approvals without approval documents. See the section F2 Approvals configuration options for more information. |

Click **OK** to finish.

If a specific approval template has been selected, the record opens with the selected approval flow. The approval flow can be initiated when the record is ready to be sent and any eventual attachments have been enclosed to the record.

If, on the other hand, “New empty approval flow” has been selected, the dialogue “New approval of [record title]” opens. The approval flow with the number of steps and approvers is set up in the dialogue. The dialogue is described in detail in the Setting up an approval flow.

## Creating a new approval in the “New record” dialogue

A new approval can be created at the same time as a new record in the “New record” dialogue.

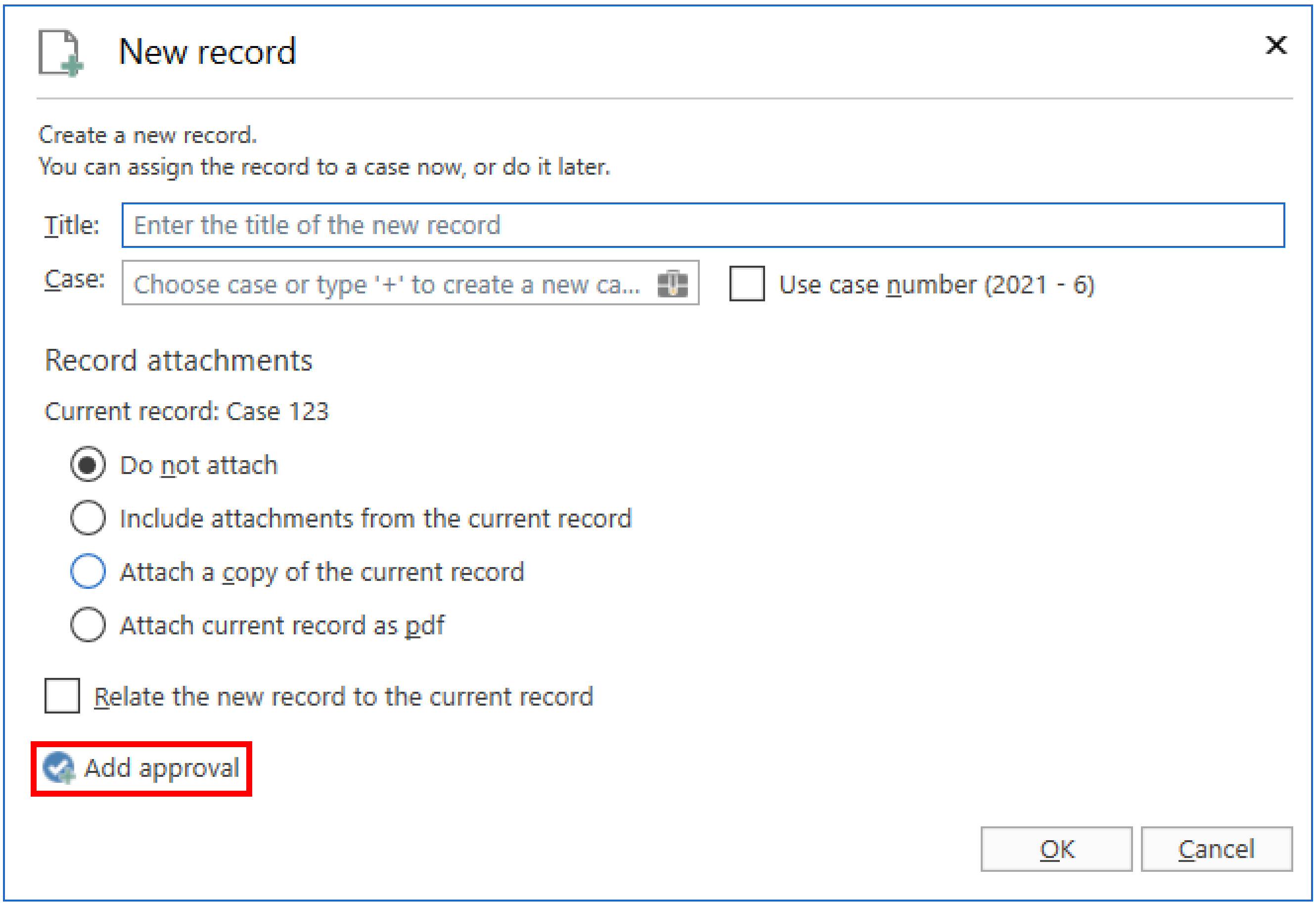



*Figure 3. The "New record" dialogue*

Click on **Add approval** to add an approval and display the “Approval template” and “Approval deadline” fields.

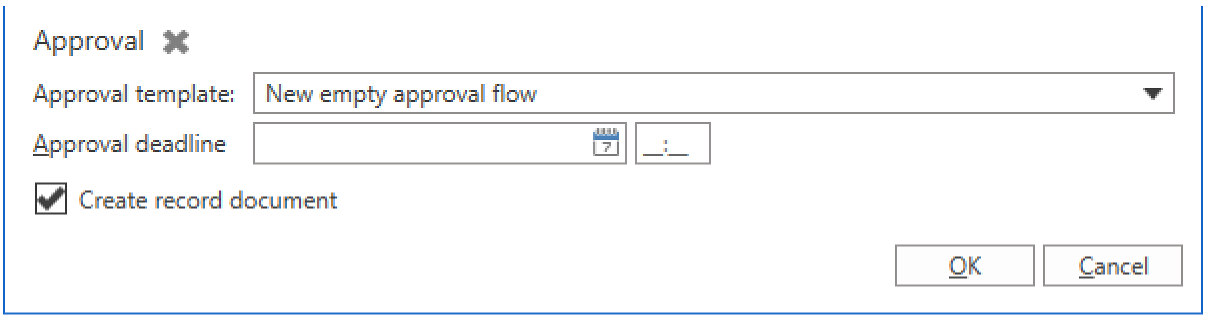



*Figure 4. Create approval while creating a new record*

Fill out the dialogue in the same manner as the “New approval” dialogue (described in Creating an approval via the main window). However, an approval record cannot be created without a record document via the “New record” dialogue.

Click on the ✖ next to “Approval” as shown above to cancel the creation of an approval on the new record.

## Creating a new approval on a record

To create an approval on an existing record, click on **Add Approval** in the record’s ribbon.

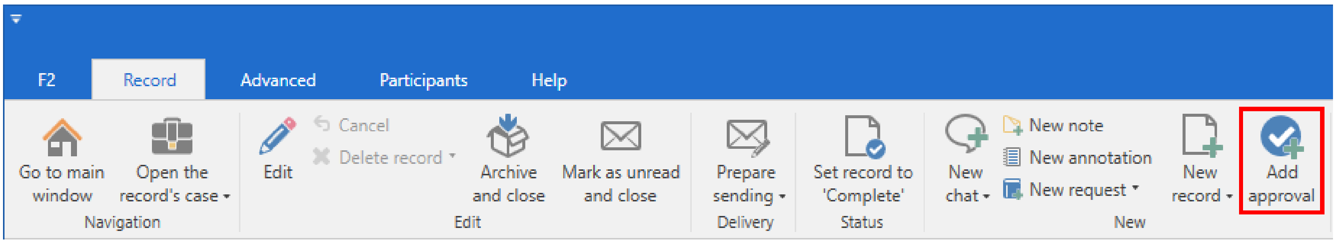



*Figure 5. The “Add Approval” menu item in the record window ribbon*

The dialogue below opens.

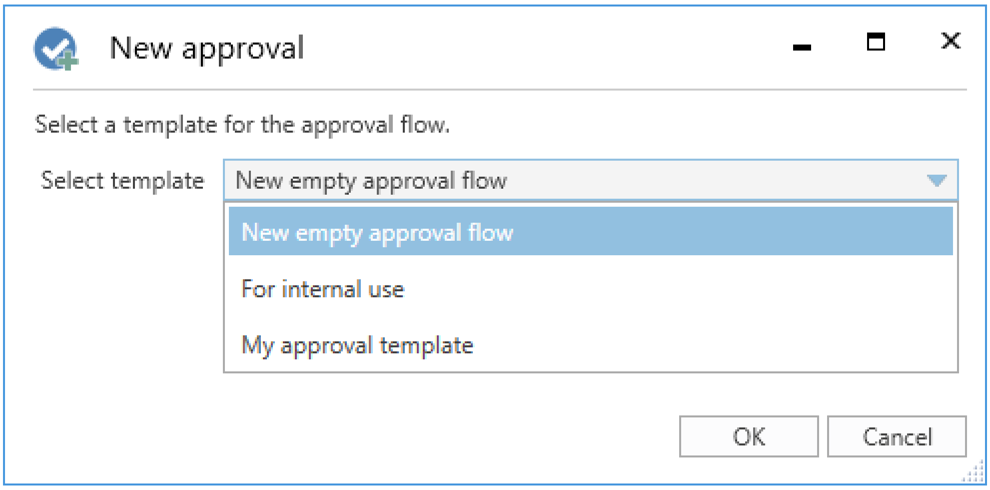



*Figure 6. Select an approval flow template*

Click on the **down arrow** in the “New empty approval flow” field. In the drop-down menu that opens, click on an **approval template** (i.e. an already created approval flow) or **New empty approval flow.** Click **OK** to finish.

When configuring F2 it is possible to enable or disable the “New empty approval flow” option. Another configuration option is whether it is possible to create an approval on an existing record. If this is disabled, approval flows may only be created in either the main window or the case window.

## Setting up an approval flow

Whether an approval is created in F2’s main window or on an existing record, the dialogue for creating a new approval is the one shown below. In this dialogue the approval flow and its number of steps and approvers are chosen.

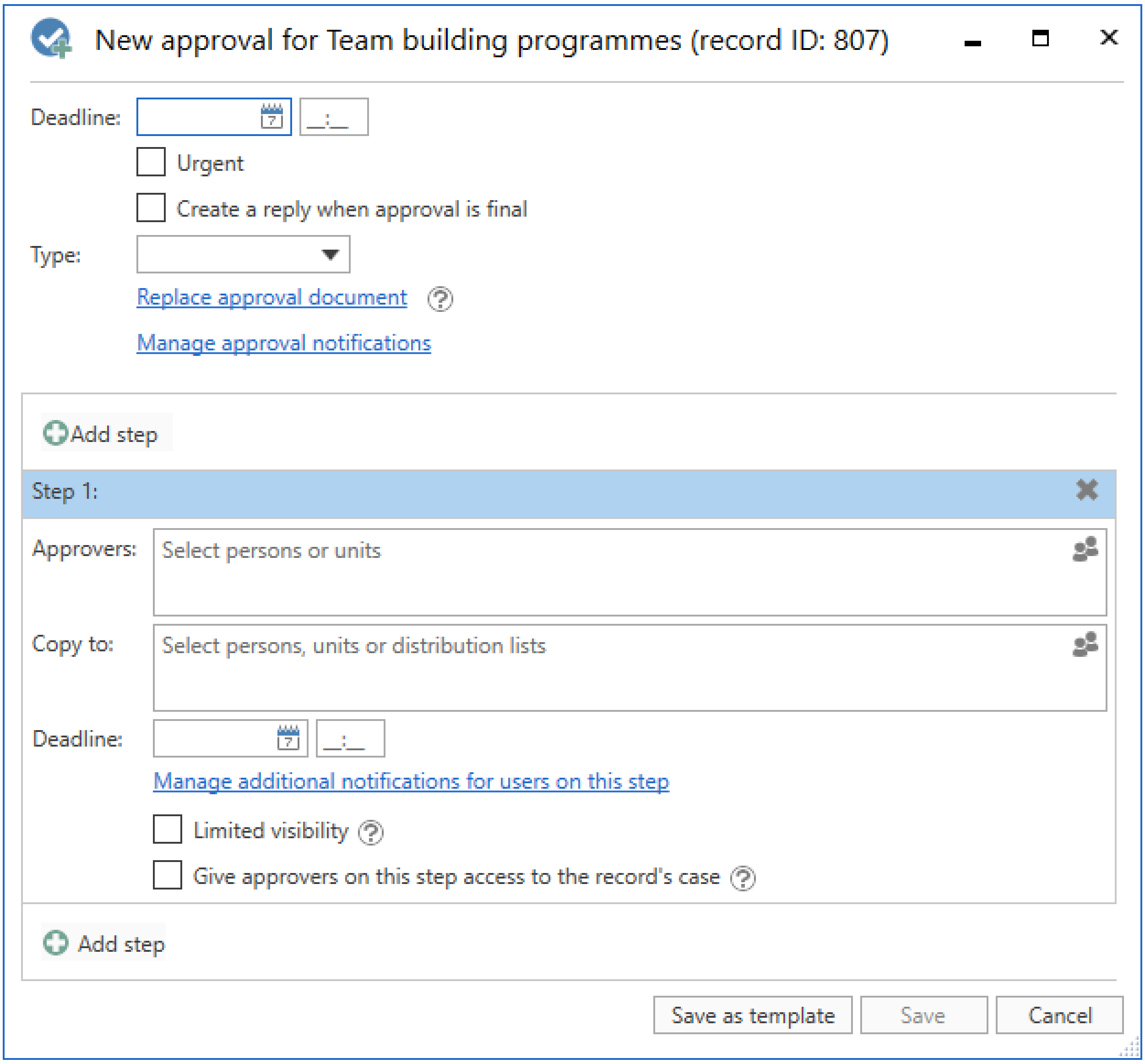



*Figure 7. Create approval flow*

The following information is specified when creating a new approval:

| Function | Description |
|---|---|
| “Deadline” | Specify the deadline for the approval’s final approval.<br><br>An exact time of day can be entered. |
| “Urgent” | Tick this box to indicate that the approval is urgent.<br><br>**NOTE** Your organisation can toggle the visibility of the box through a configuration. |
| “Create a reply when approval is final” | Automatically create a reply record upon final approval. This requires the F2 Signed Approval module. |
| “Type” | Select the approval type.<br><br>Approval types are defined by a user with the “Value list administrator” privilege and vary between organisations. Examples include:<br><br>• For information<br>• For approval. |
| “Replace approval document” | Replace the approval document with another approval document.<br><br>**NOTE** An approval document can contain a description of, or comments about, the approval flow. |
| “Manage approval notifications” | Set up notifications for each approval step. Read more in Manage approval notifications. |
| “Add step” | Add new approval steps to the approval flow. For each approval step it is possible to add metadata described below.<br><br>It is possible to add steps before and after an existing approval step. An unlimited number of steps can be added to an approval flow.<br><br>Delete an approval step by clicking on . |
| “Approvers” | All approval steps require an approver (an internal participant from the participant register).<br><br>Add one or more approvers in the field. |

| Function | Description |
|---|---|
| | **NOTE** F2 can be configured to allow more than one approver per step, i.e. parallel approvers. For more information, see F2 Approvals configuration options.<br><br>**NOTE** If multiple approvers use F2 Manager for approvals, they should be added on individual steps rather than as parallel approvers.<br><br>If a unit is selected as approver, the approval is placed in its shared inbox when it reaches the relevant step. This means all employees of the unit can view the approval and approve on behalf of the unit. |
| “Copy to” | Inform users who are not part of the approval flow about an approval step.<br><br>One or more users, units and distribution lists can be specified in this field.<br><br>**NOTE** The copy recipient is not an approver and can only comment on the approval until the approver on this step has approved. |
| “Deadline” | Set a deadline for each approver of the approval step. |
| “Manage additional notifications for users on this step” | Open the “Edit approver” dialogue where notifications can be set up for approvers on the specific step. |
| “Limited visibility” | Tick this field to hide the approval from this step’s approvers and any copy recipients, until the approval reaches this step.<br><br>**NOTE** Ticking this box will not have any effect if approvers have been granted access through other means, e.g. through chats or the record access level "All". |
| “Give approvers on this step access to the record case” | Tick this field to give the approver write permission to the record’s case. The permission is automatically revoked when the record is finally approved. Read more about this in the section Give approvers write access to the record’s case. |

**NOTE** An approval cannot be created if it contains an empty approval step.

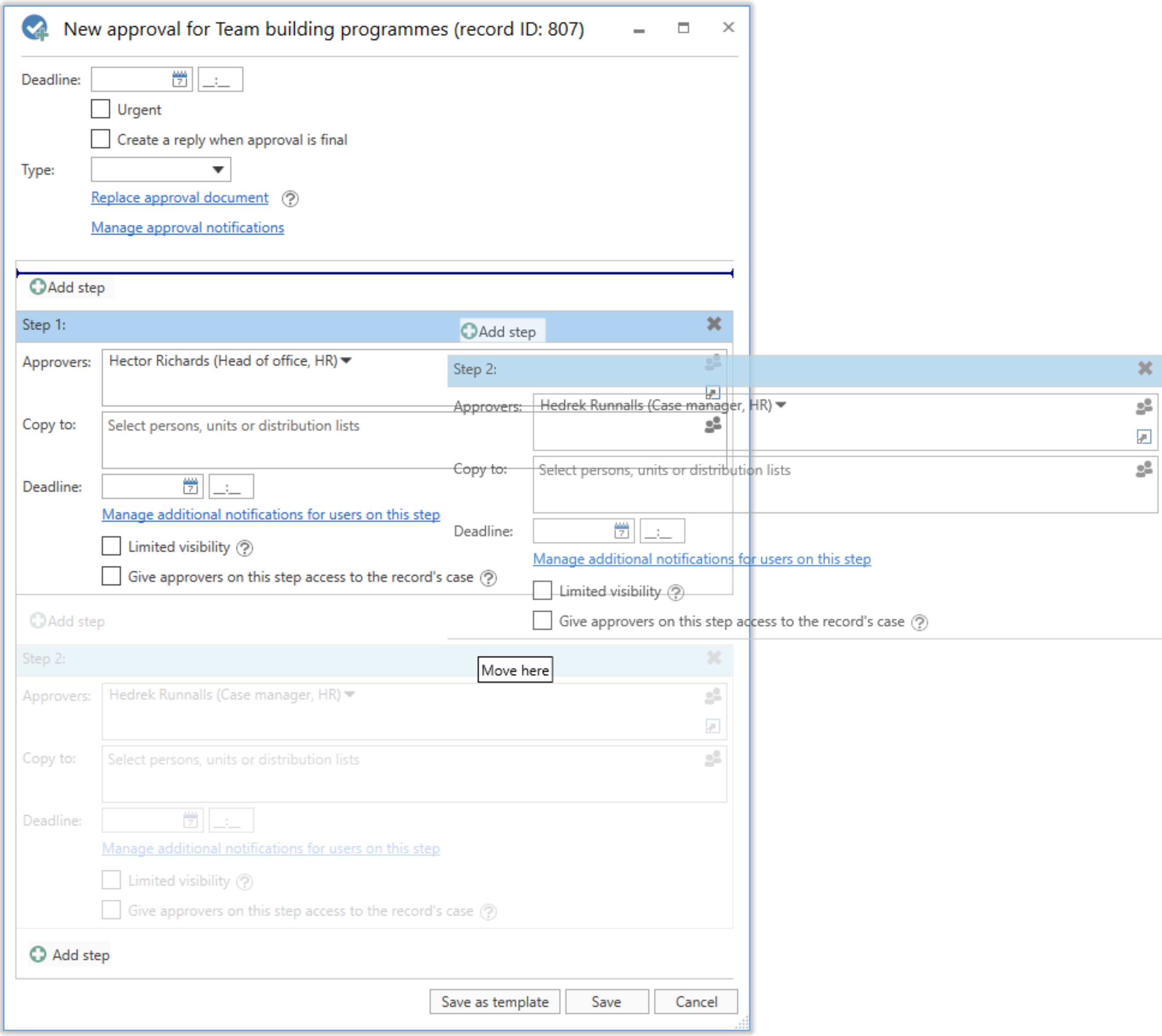
## Adding and moving approval steps

Before starting an approval, it is possible to add approval steps both before and after an existing step. If necessary, the sequence of approval steps can also be rearranged.

The Add step function is found between each approval step. Click on **Add step** between two existing steps to add a new one between them. It is possible to add steps before, after and between existing approval steps.

**NOTE** Once the approval flow has started, it is not possible to add any additional approval steps before or between steps already approved. Other options are available when an approval is restarted.

The sequence of approvers can be changed by moving approval steps up or down. Click and hold the blue bar indicating the step. Drag the approval step to the desired location. A dark blue line shows to where the approval step will be moved, as illustrated below.



Drop the bar to insert the approval step with its approver and metadata. The sequence of approvers is now changed and the step numbers automatically change. This functionality simplifies setting up and editing approval flows.

Click on **Save** to save the changes.

## Adding a copy recipient

If a copy recipient is added to an approval step, they will receive the approval in their inbox once the approval flow reaches their step. As shown in the example below, copy recipients Siún Moynihan and Stanley Matthews receive the approval in their inboxes when approver Sienna Morton receives the approval.

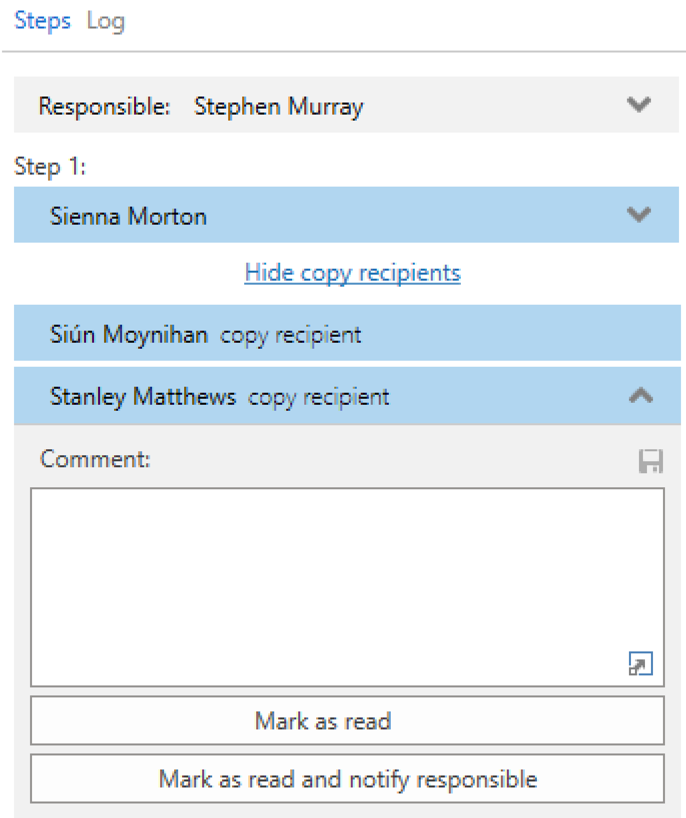



*Figure 9. Copy recipient's approval processing options*

**NOTE** By default, the names of copy recipients are hidden behind the "Show copy recipients" link in approval flows. You can change this in your personal setup so copy recipients are always shown.

A copy recipient can neither approve nor return an approval. A copy recipient can add a comment to the approval and call the responsible user's attention to it as well as indicate that they have seen the approval.

The copy recipient's processing period is not limited to the step in the approval process where they are added. Unlike the approver, the copy recipient can continue to process the approval after it has left their step and even after final approval. In instances where the approval is returned and the process starts over, the copy recipient will still be able to process the approval at any time. Any previous comment will be removed, and the approval will no longer be marked as read, but both actions are logged in the activity log.

There are two ways in which a copy recipient can process an approval:

- **"Mark as read"**: The copy recipient acknowledges having seen the approval.
- **"Mark as read and notify responsible"**: The copy recipient acknowledges having seen the approval, and the responsible user receives the approval in their inbox with a notification that it has been seen and commented on by the copy recipient. This way the copy recipient ensures that the responsible user is aware of the copy recipient's comment.

When an approval is marked as read, an info icon is displayed next to the copy recipient's name. It is registered in the activity log of the approval that the copy recipient has marked the approval as seen.

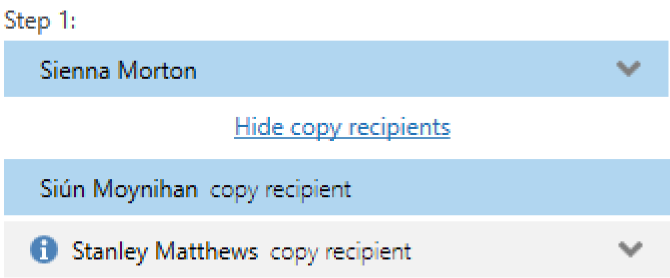



*Figure 10. "Seen" mark for copy recipient*

Both users and units can be defined as copy recipients on an approval step.

## Give approvers write access to the record's case

It is possible to give approvers write access to the case to which the approval record is attached. To give an approver write access to the case, tick the box "Give approvers on this step access to the record's case" on the relevant approval steps. This can be done when an approval is being created or edited. This setting is saved when an approval flow is saved as an approval template.

When the approval has been finally approved, the write access given at the time of creation or editing is automatically revoked.

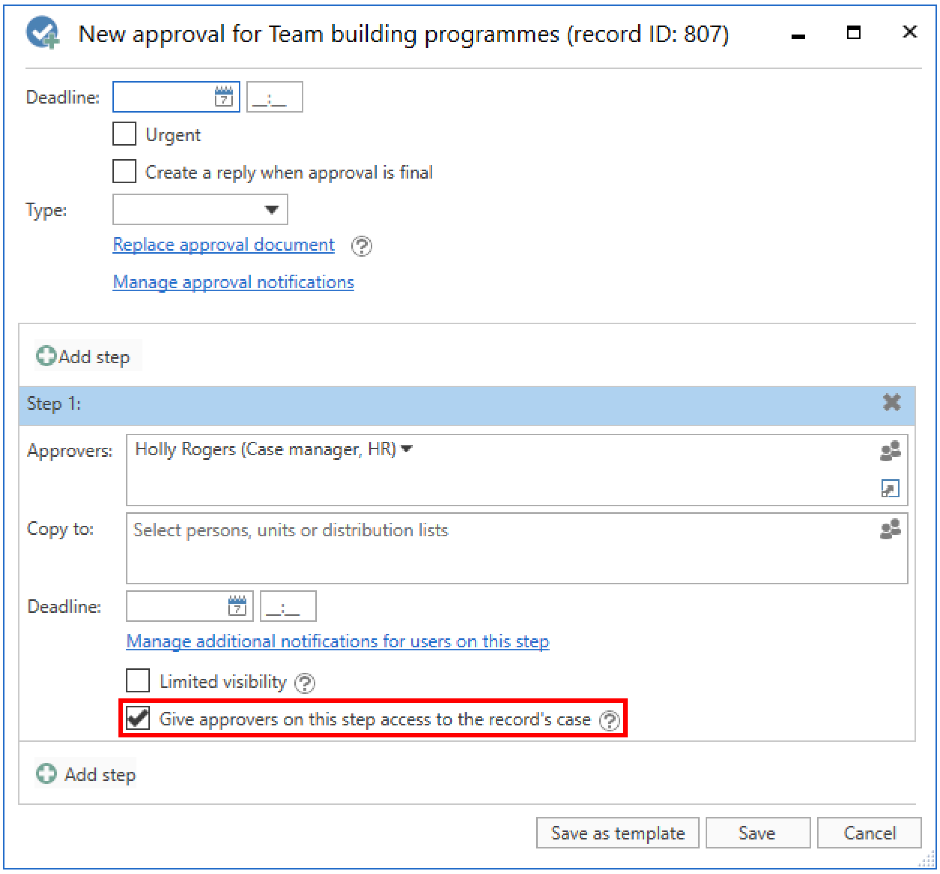



*Figure 11. Give approvers write access to the record's case*

It is not possible to give write access to approvers who have already received the approval.

If a case has been assigned limited access properties, users who have not been granted access to it do not receive access even if the box “Give approvers on this step access to the record’s case” is ticked.

**NOTE** A user who can handle approvals on behalf of another user does not obtain write access to the record’s case. The write access is limited to the specified approver.

# Manage approval notifications

Approval notifications are managed in the “Approval notifications” dialogue. Open the dialogue from the record window’s “Approval” tab by clicking **Approval notifications**.

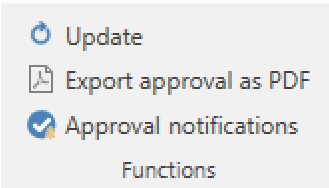



*Figure 12. The approval notifications menu item*

You can also open the dialogue from the “New approval” dialogue by clicking **Manage approval notifications**.

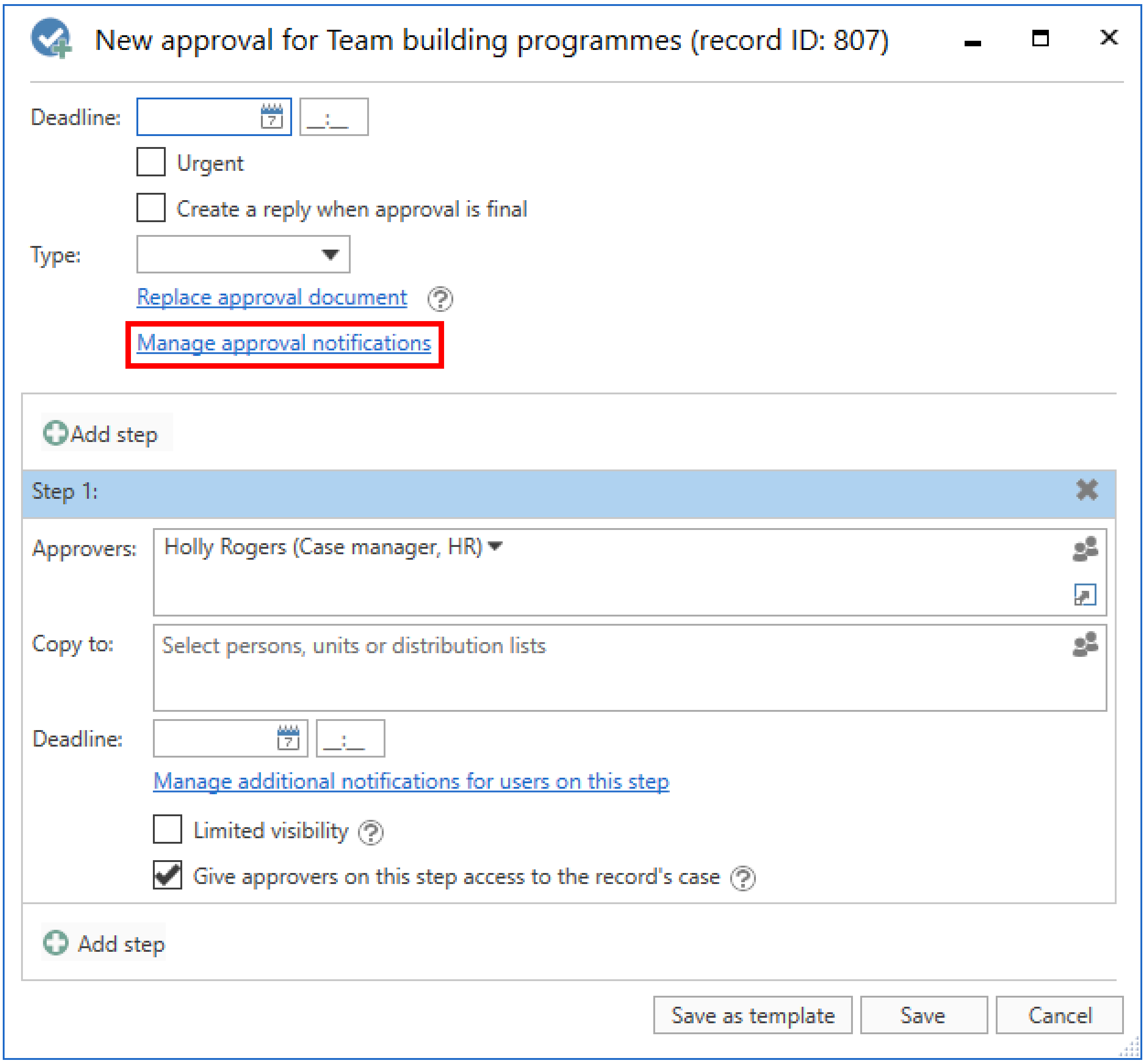



*Figure 13. Manage notifications of the approval*

From here, notifications are managed for each step in the approval process.

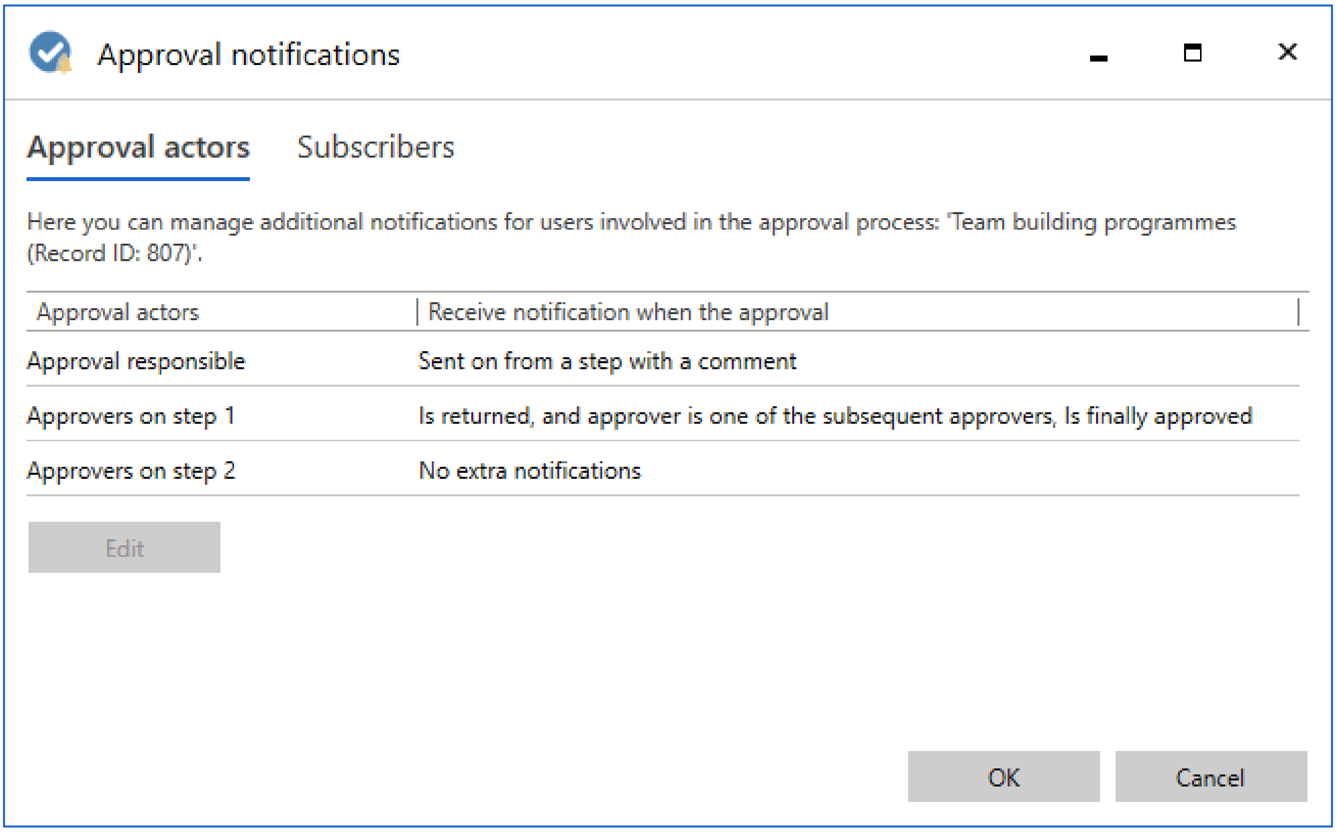



*Figure 14. The "Approval notifications" dialogue*

Select a step and click **Edit**. The “Edit approver” dialogue opens when a step with approvers has been selected. The dialogue is displayed below.

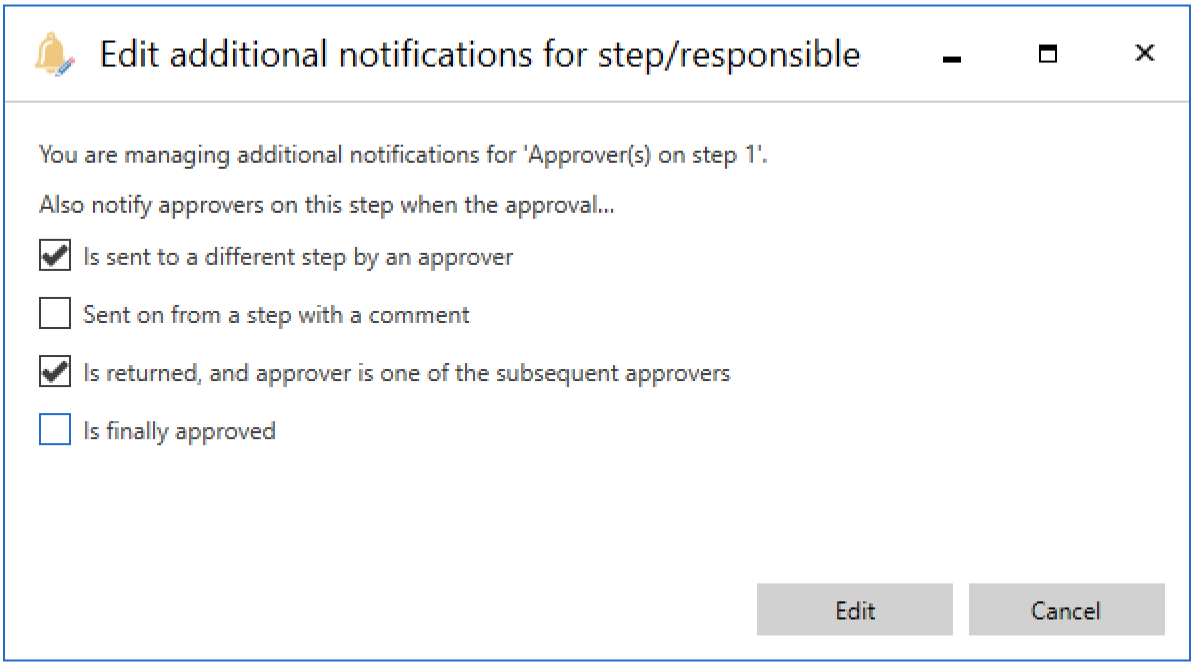



*Figure 15. Notification options in the "Edit approver" dialogue*

Notifications can also be managed for each step directed though the dialogue “Edit approval process for [name of the approval]” by clicking **Manage additional notifications for users on this step**. The dialogue is available when creating a new approval and via the record window’s “Approval” tab by clicking **Edit approval flow**.

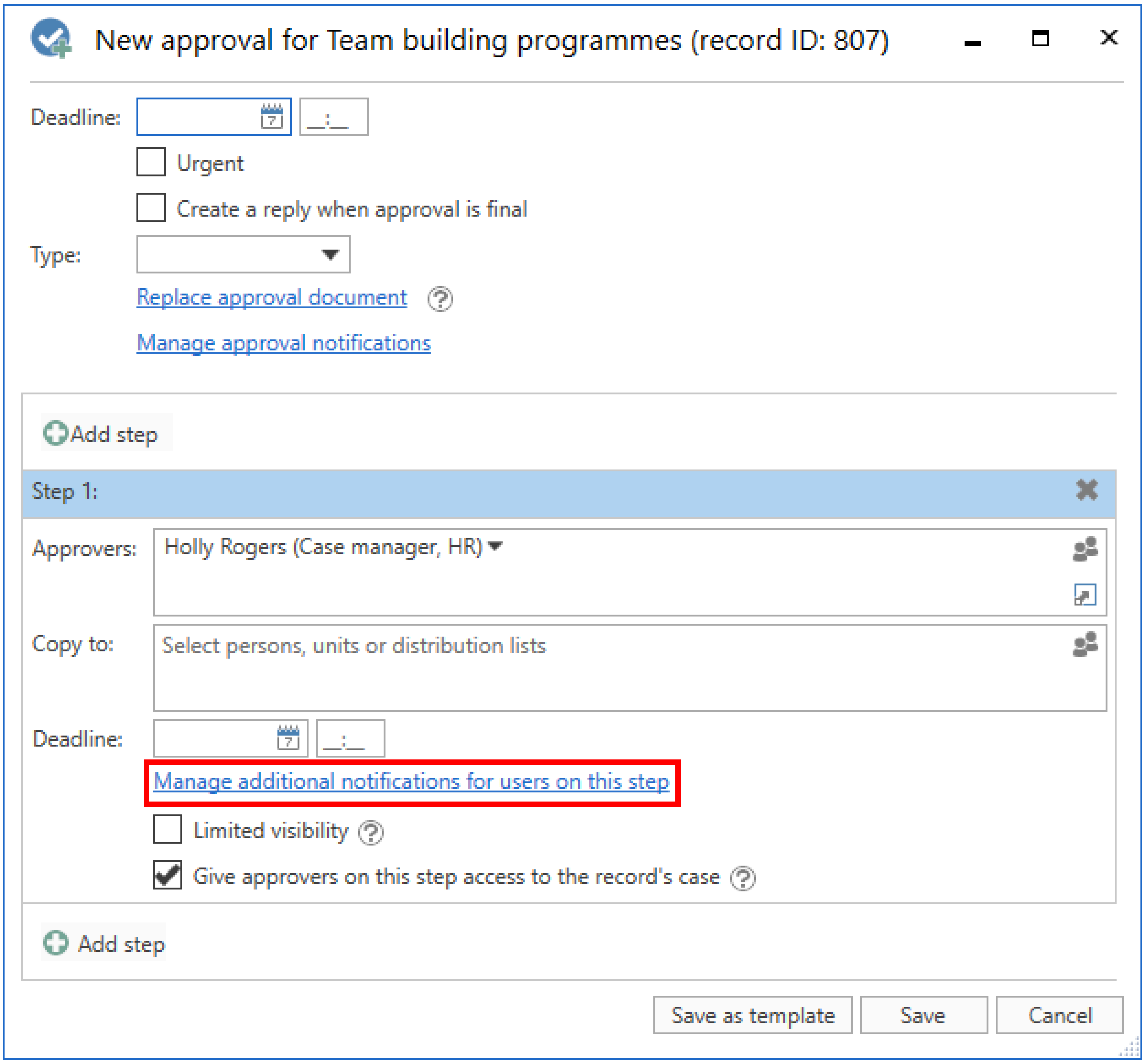



*Figure 16. Manage notifications on an individual step*

The table below lists the different ways users can be involved in an approval flow and which notifications are available for each.

| User | Available types of notifications |
|---|---|
| Responsible user/unit | When the approval moves to a different step.<br><br>When the approval is sent on from a step with a comment. |
| Approver | When the approval is sent to a different step by an approver.<br><br>When the approval is sent on from a step with a comment.<br><br>When the approval is returned, and approver is one of the subsequent approvers.<br><br>When the approval is finally approved. |
| Subscriber | When the approval moves to a different step.<br><br>When the approval is sent on from a step with a comment.<br><br>When the approval is finally approved. |

**NOTE** When assigning "On behalf of" rights to a user, you can toggle whether said user also receives approval notifications.

## Manage subscriber notifications

Users can subscribe to approvals and receive notifications, even if they are not part of the approval flow. Subscribers and their notifications are also managed from the “Approval notifications” dialogue by switching to the “Subscribers” tab.

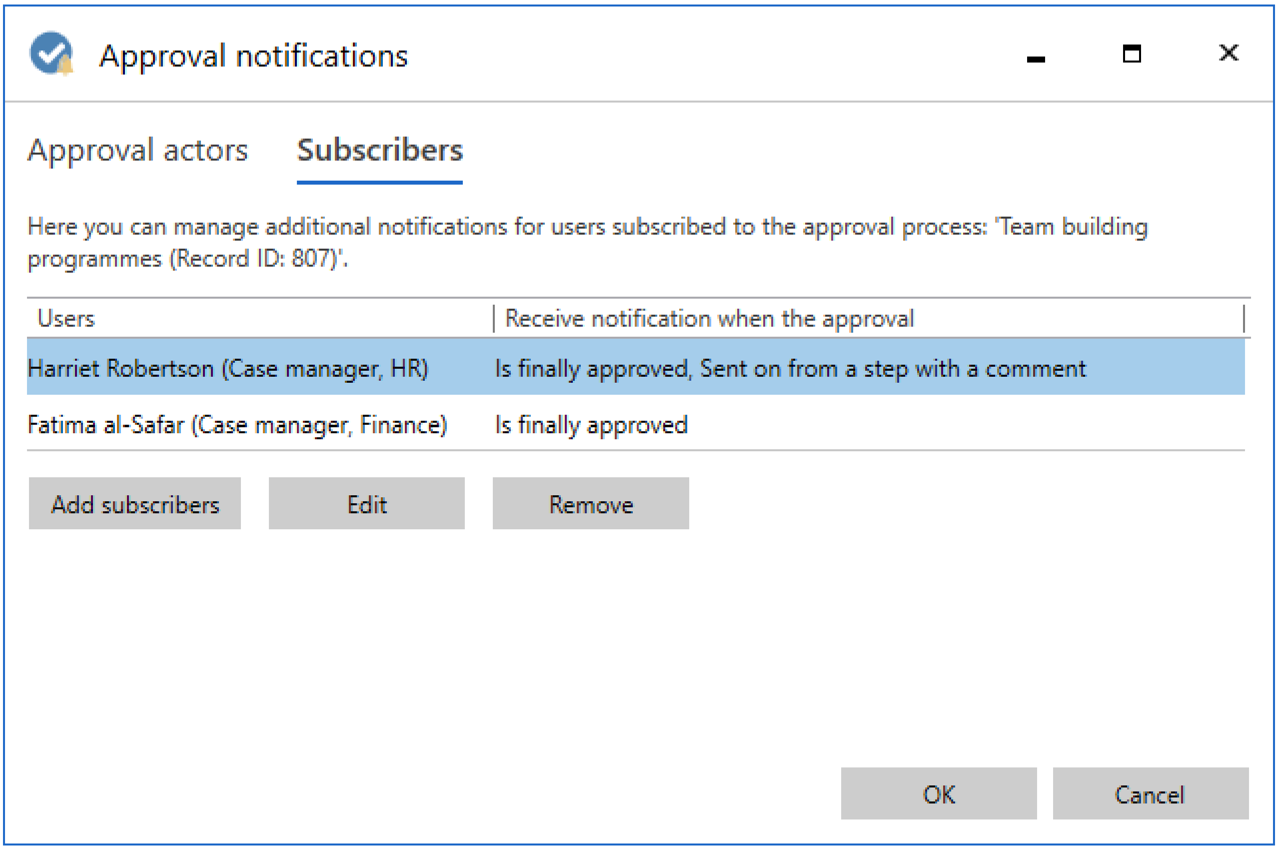



*Figure 17. Manage extra notifications for subscribers*

Add, edit, or remove subscribers via this dialogue. Click **Add subscribers** to open the dialogue displayed below.

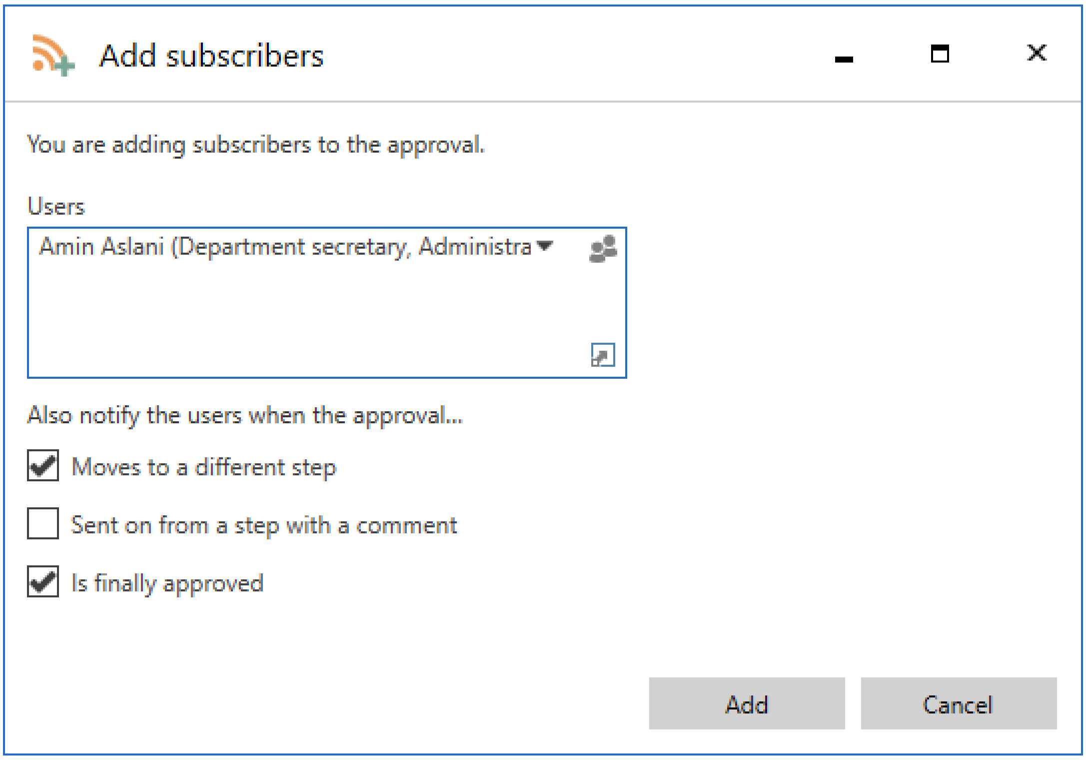



*Figure 18. Add subscribers to the approval*

# Create an approval template

If a given approval flow will be used more than once, it can be saved as an approval template.

There are two template types:

- Personal approval templates: Created by a user and can only be viewed and accessed by this user.
- Shared approval templates: Available to the entire organisation and/or selected units. Shared approval templates are created by a user with the “Template administrator” privilege, who determines to whom the approval template is available.

Both template types are created by clicking on **Save as template** in the dialogue shown below.

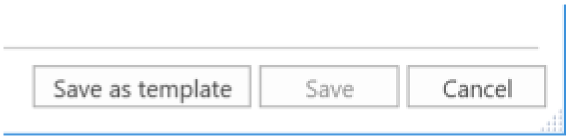



*Figure 19. Save new template*

**Personal approval templates:** Name the approval template, and F2 automatically suggests an external ID that you can edit. Click **OK** to save the template, which is now saved as a personal template that you can access the next time you create a new approval.

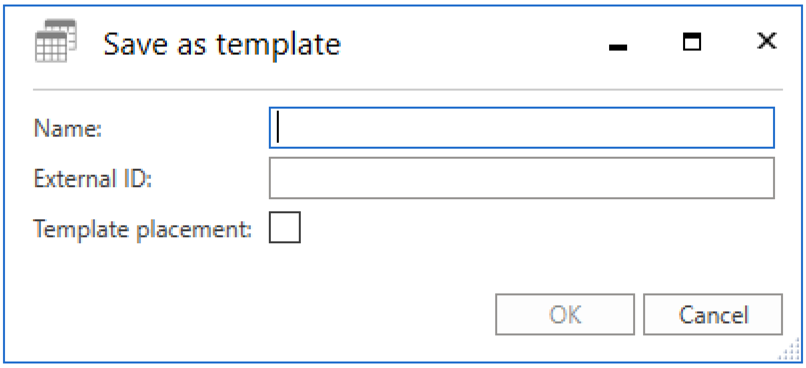



*Figure 20. Save personal approval template*

**Shared approval templates:** The following setup is only available to users with the “Template administrator” privilege. Name the approval template, and F2 automatically suggests an external ID that you can edit. Tick the “Template placement” box, and select whether the template should be available to all users in the organisation or to a certain unit only (the organisation/unit must be selected). Click **OK** to save the template, which can now be accessed by the selected users.

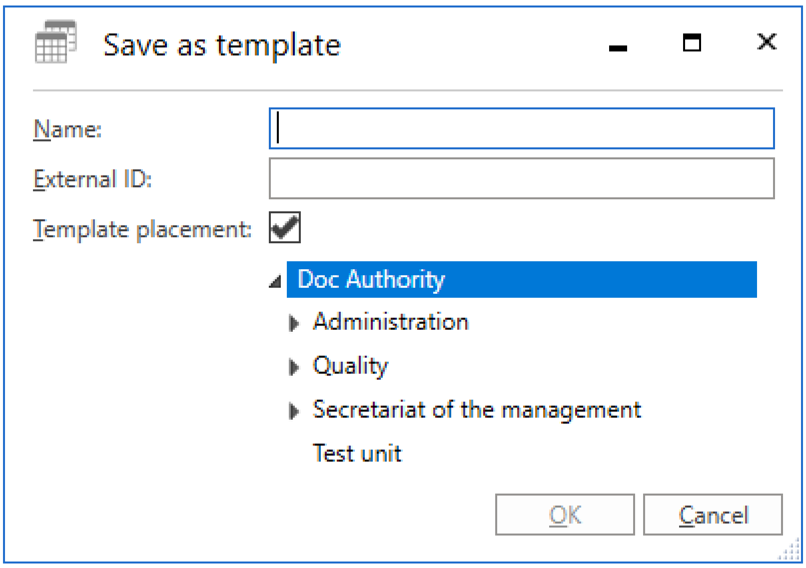


*Figure 21. Save shared approval template*

**NOTE** The option to save personal approval templates can be toggled through a configuration.

Personal and shared approval templates can be accessed in the “New approval” dialogue or the “New record” dialogue.

## Editing and deleting approval templates

Personal and shared approval templates can be edited and/or deleted from the “Settings” tab in the main window. Click on **Approval templates**.

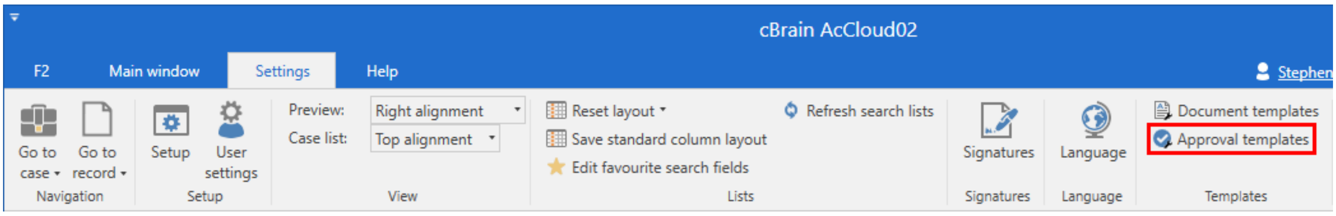



*Figure 22. The “Approval templates” menu item*

The “Approval templates” dialogue opens to show an overview of approval templates that the user is authorised to view and delete.

**NOTE** Only users with the “Template administrator” privilege can edit or delete shared approval templates.

For users with the “Template administrator” privilege both personal and administrator-configured templates are displayed. In the “Location” column, the user can see the location of the approval templates.

To edit or delete an approval template, highlight the relevant template in the dialogue and click on either **Edit template** or **Delete**.

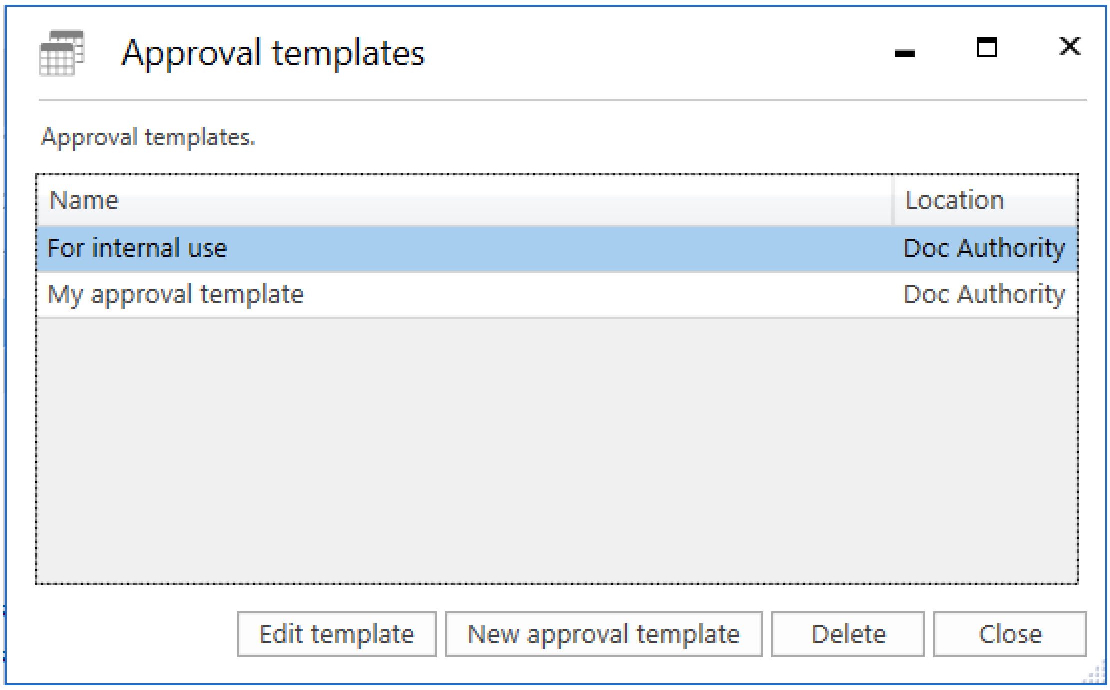


*Figure 23. Edit or delete approval template*

Deleted approval templates cannot be restored, but must be manually recreated.

Users with the “Template administrator” privilege can create approval templates directly from the “Approval templates” dialogue. Click on **New approval template** to open the dialogue. From here an approval flow can be set up and saved as a template. Read more about setting up the approval flow.

# Personal settings for default approval templates

Each user can select a default approval template. This personal setting can be found on the “Settings” tab in the main window. Select the **Setup** menu item and, in the dialogue that opens, select the **User** tab. In the “Default approval template” drop-down menu, select the desired approval template. This function is useful e.g. when creating new templates or editing user settings.

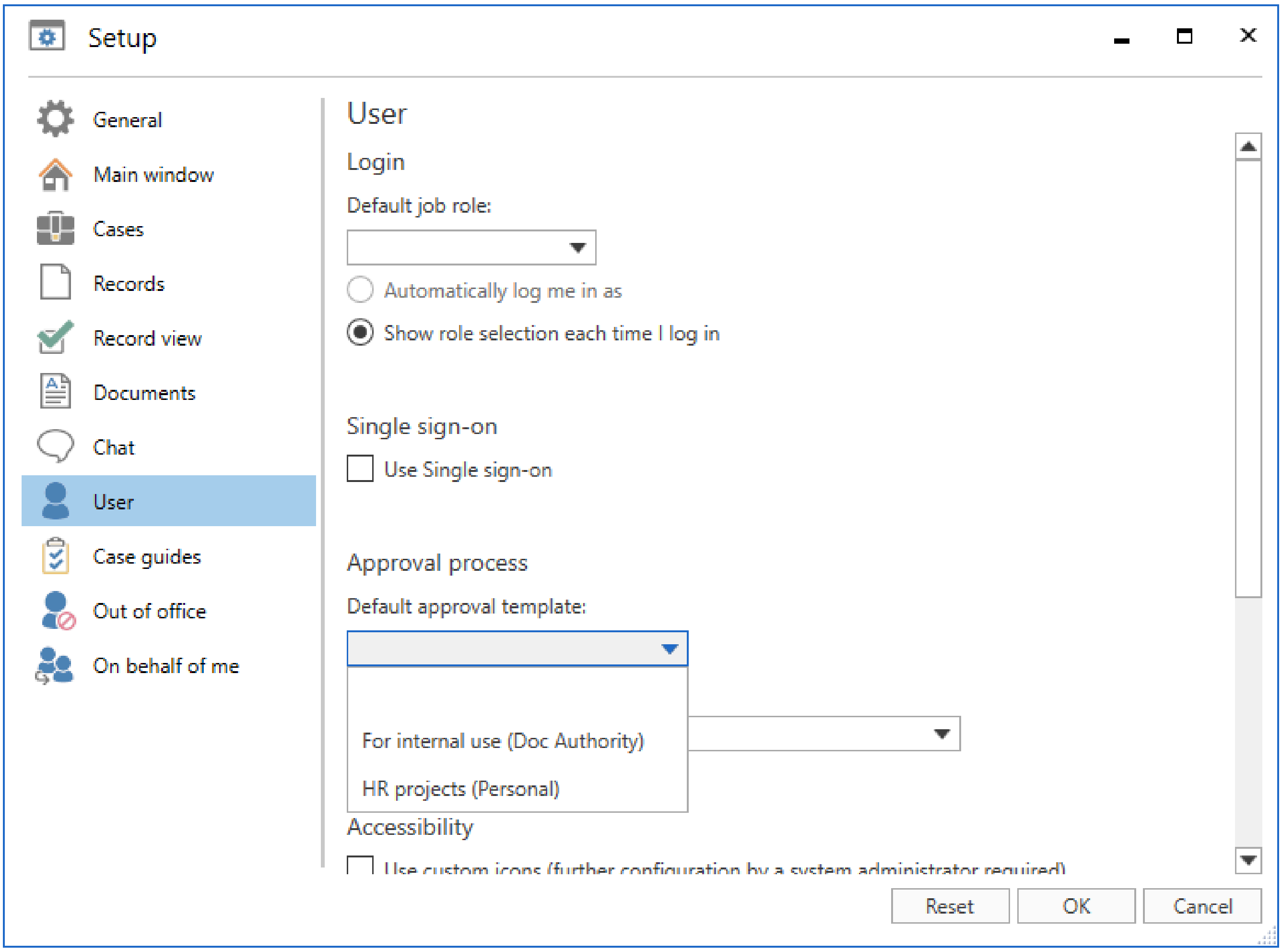



*Figure 24. Choose a standard approval template*

# Approval structure

A record is automatically converted to an approval record when an approval is attached to it.

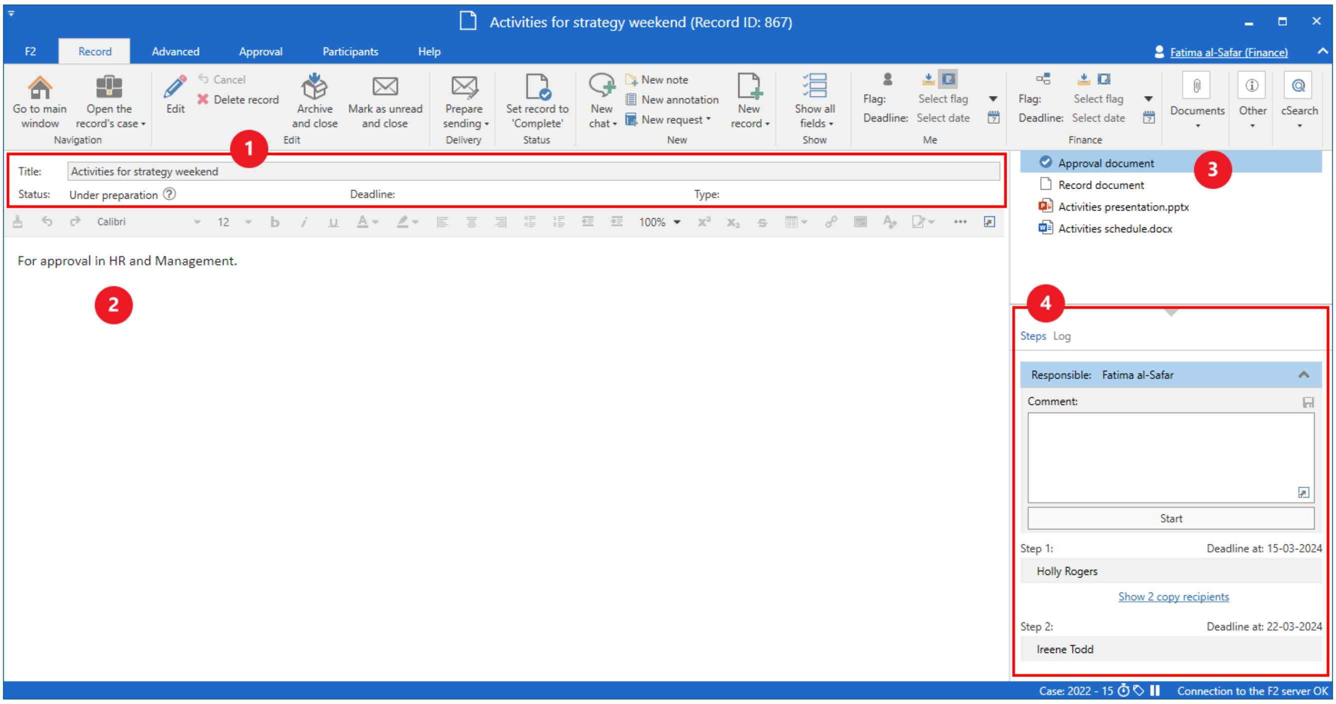



*Figure 25. Newly created approval record*

The approval record consists of:

- Approval fields (1), which contain the metadata specifically related to an approval.
- The approval document (2) located in the document area (3).
- The actual approval flow (4).

In addition, there may be documents, comments, etc. attached to the approval record.

This means all approval-related information is gathered in one place. Hence, it is possible to simultaneously create approval actions and make document changes.

Changes to the approval flow can be made in the “Approval” tab.

# The approval metadata

The approval metadata are displayed at the top of the record and elaborated in the following table.

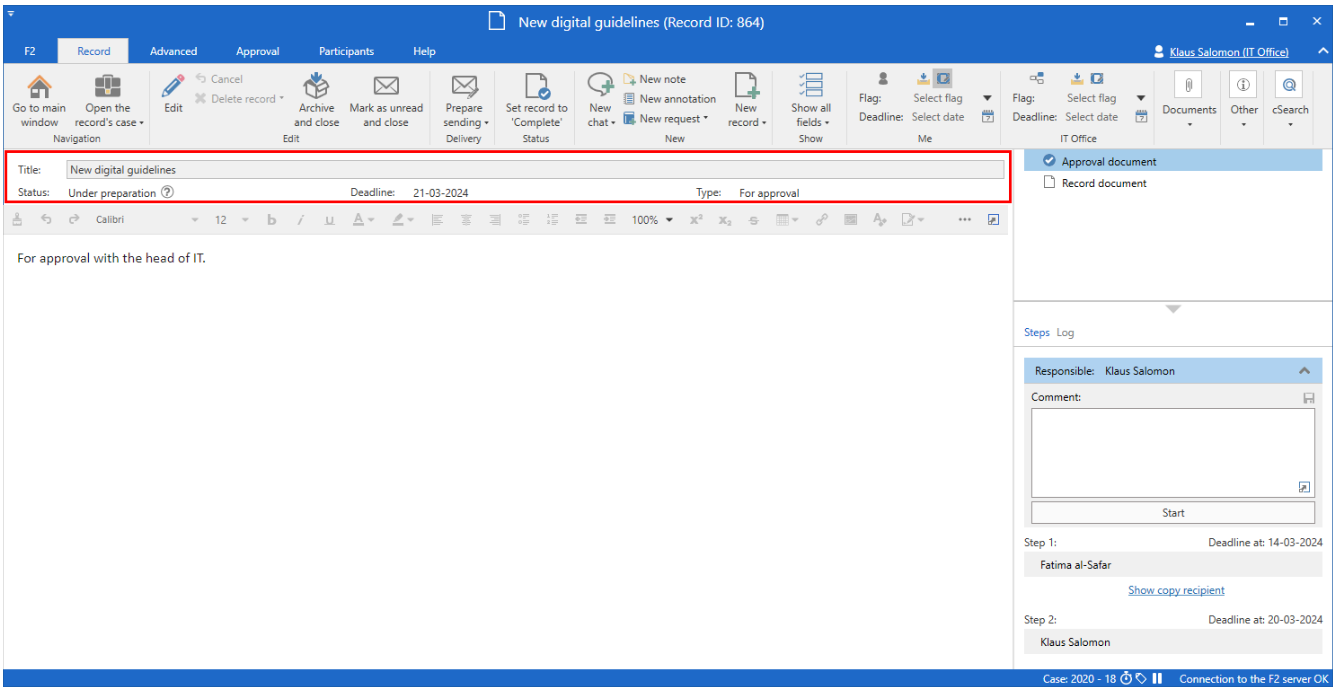



*Figure 26. Approval metadata on the record*

The following metadata fields are displayed:

| Function | Purpose |
|---|---|
| "Title" | Specifies the title of the record and serves as the approval's headline. |
| "Status" | Shows the status of the approval.<br><br>Click on ⓘ to see a detailed status clarification. |
| "Deadline" | Specifies the date and time for the final approval. |
| "Urgent" | "Urgent" is displayed after the deadline if the responsible user ticked the box when creating the approval. |
| "Type" | Indicates the type of approval. Depending on the installation, different approval types can be defined when managing the value lists. |

## Approval document

The approval document is shown below the metadata fields if it has been selected on the right.

The approval document is separate from the record document and is intended to contain a description of the approval. Text formatting in the approval document is similar to that of the record document. The approval document can contain information for the front page of the approval.

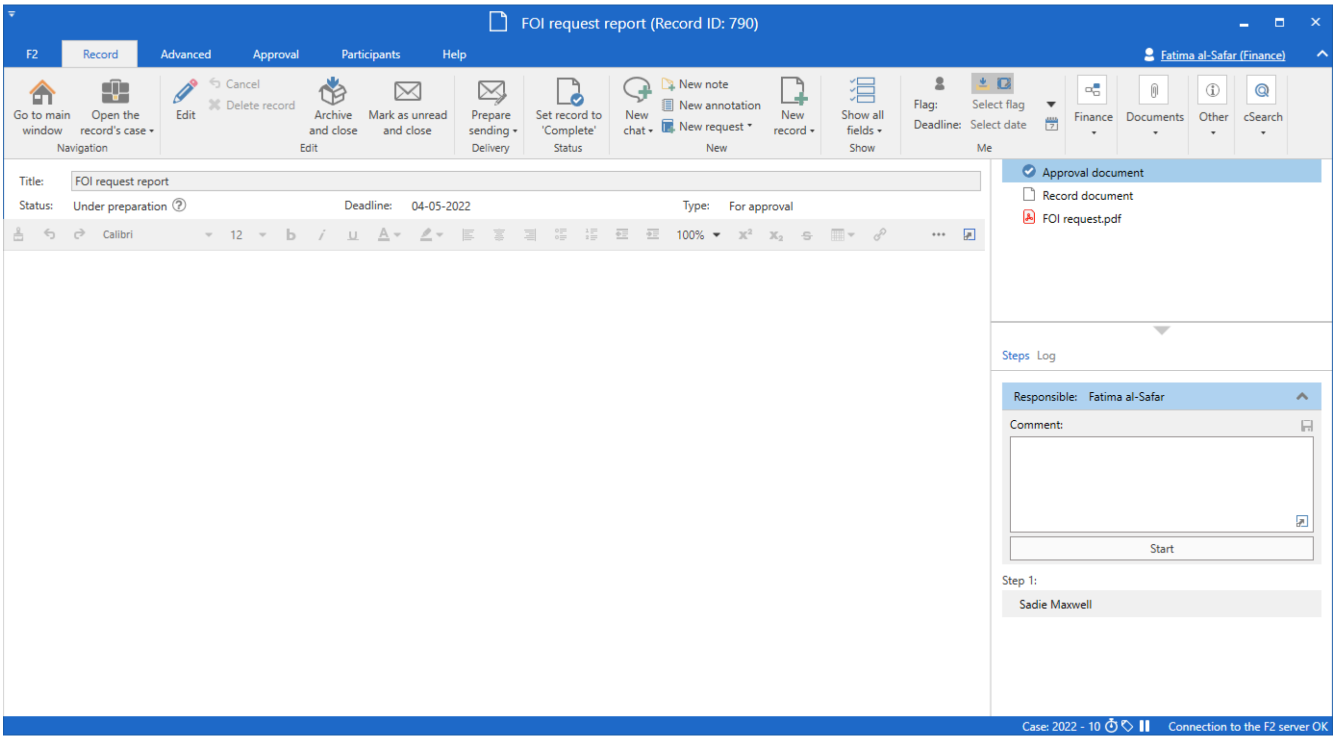


*Figure 27. Approval document*

If the record on which the approval is placed is sent as an email, it is the record document that is displayed as the email body. The approval document is not enclosed when the record is sent as an email. The approval document should be regarded as an internal document.

**NOTE** Users can make changes to the approval document if they have write access to the approval record's documents.

# Replace approval document

An approval document can be replaced with another approval document by clicking on **Replace approval document** in either the "New approval flow" dialogue or "Edit approval flow", depending on whether the user is creating a new approval flow or editing an existing one.

Clicking on **Replace approval document** opens the "Replace approval document" dialogue, as shown below. Click on the drop-down menu in the dialogue to select a new approval template from the drop-down menu.

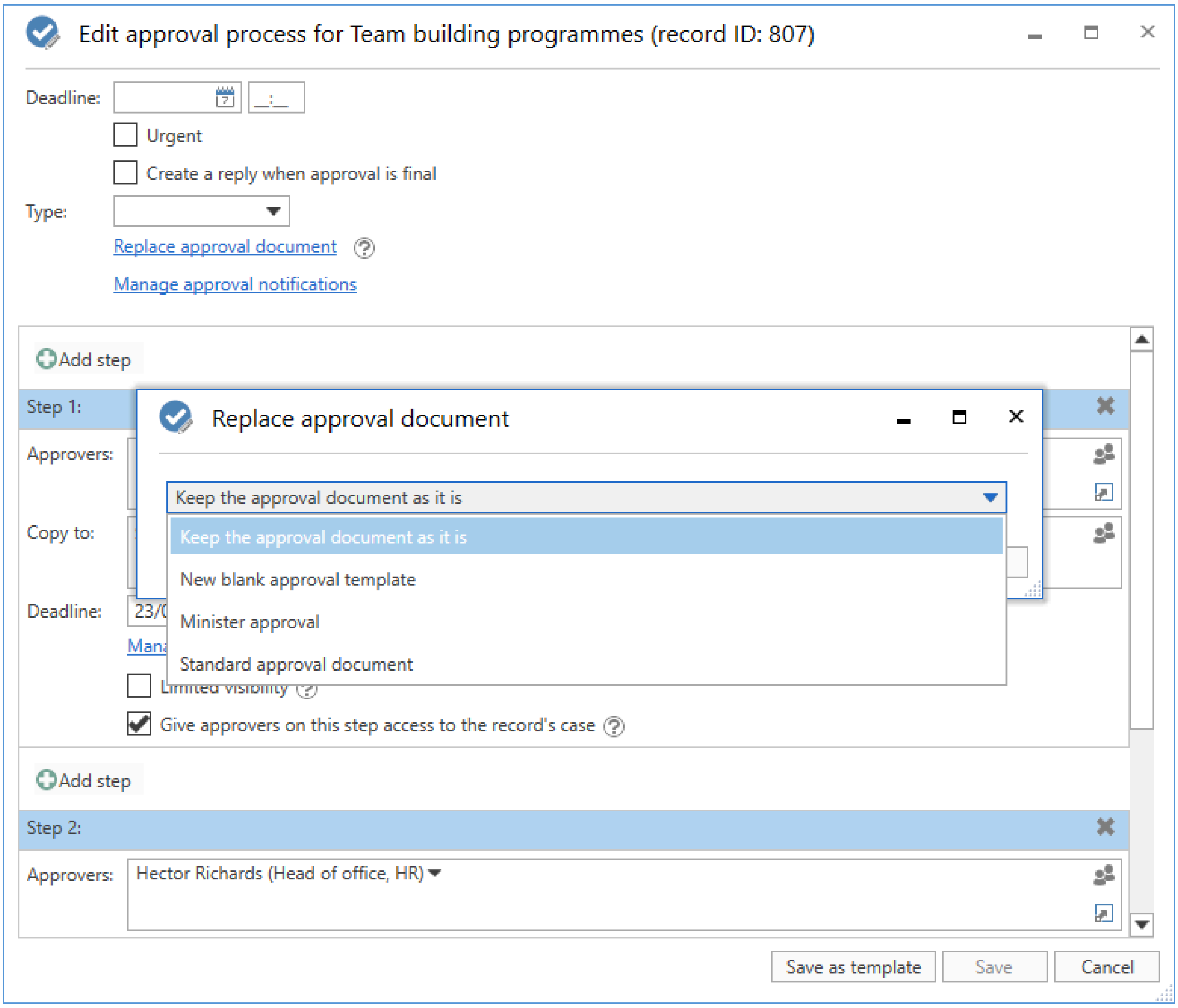



*Figure 28. Replace approval document*

**CONFIGURATION**

The number of available approval documents may vary between organisations. To make approval documents available to the entire organisation, further configuration in cooperation with cBrain is required.

Select a new approval document and click on **OK**. Near the top of the dialogue ("New approval flow" or "Edit approval flow") a bracketed text informs the user that a new approval document has been selected.

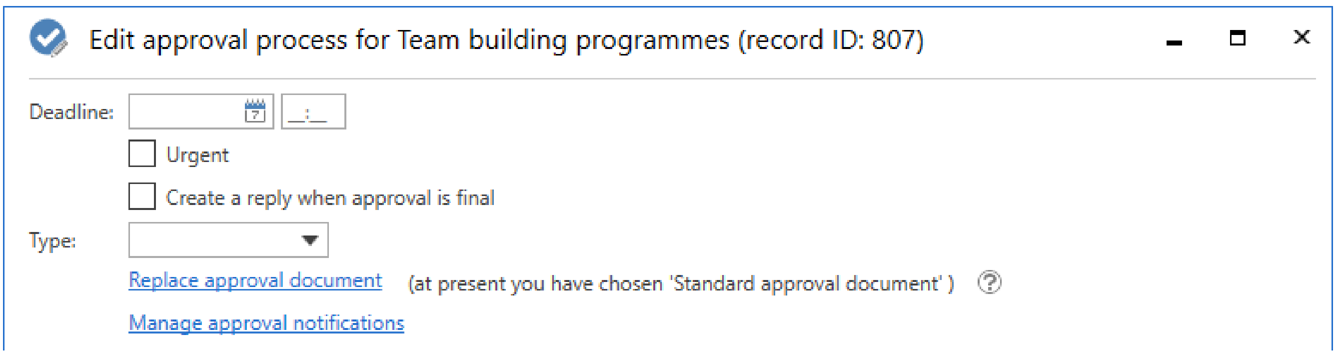



*Figure 29. F2 informs the user which approval document has been selected*

Click on Save at the bottom of the dialogue to replace the approval document.

A warning dialogue opens to inform the user that the current approval document will be overwritten and any changes made to it will be lost.

Click on **Yes** to overwrite the existing approval document. To cancel this action, click on **No**.

# The record document

Open the record document by selecting it in the right side of the record window.

If an approval was created without a record document, it is possible to create the record document later. This is necessary if the approval record must be sent as an email as it is the record document that will be displayed as the email’s content.

During the configuration of F2 the organisation can decide which options are available when creating approvals without approval documents.

## Creating a record document

To create a record document on an approval record, set the record in read mode. Then click on **Create record document** on the “Advanced” tab in the record window. The record document is created and can be found below the approval document. This record document can be edited just like any other record document.

**NOTE** The record document cannot be deleted once it has been created.

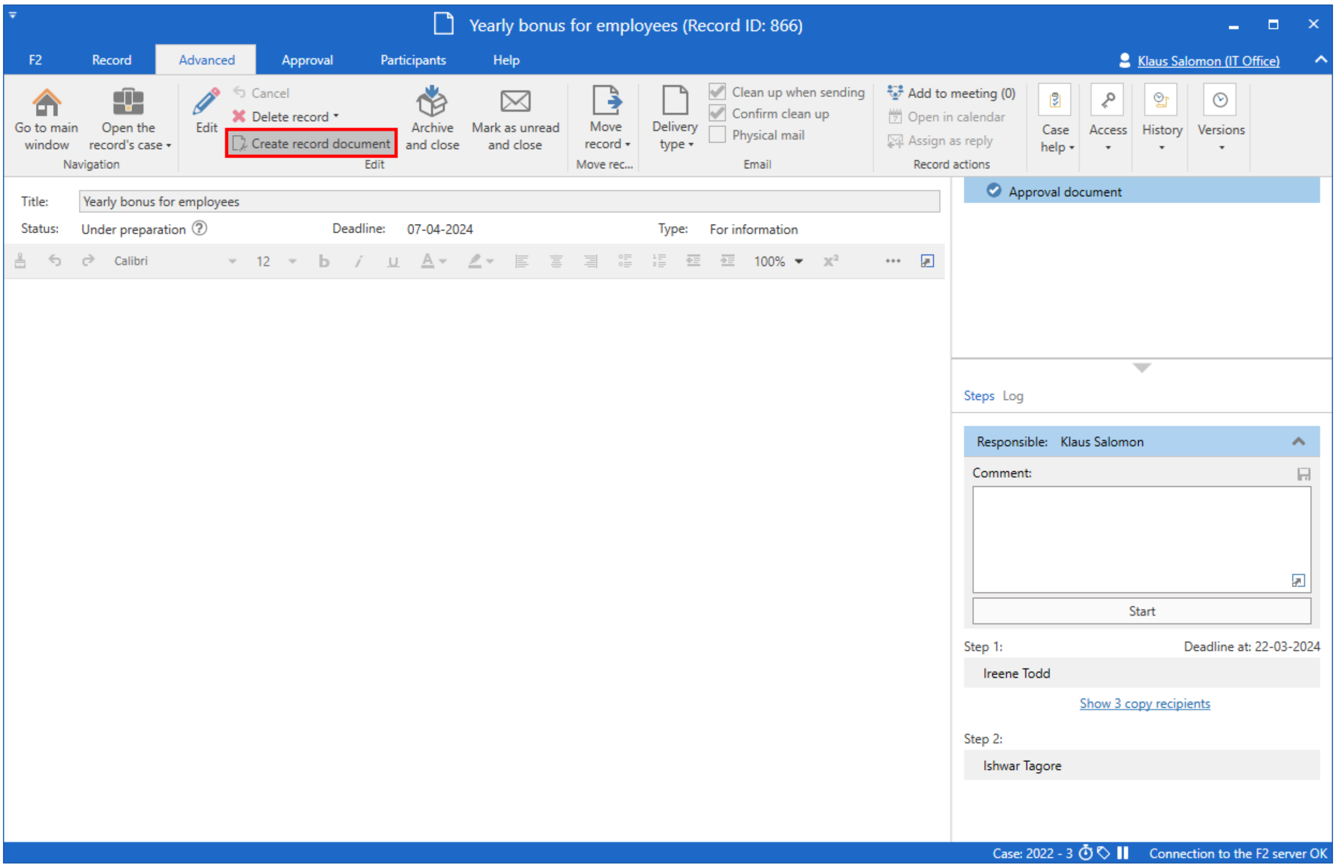


*Figure 30. Create a record document*

# Start approval flow

The approval is processed on the right side of the approval record. All options for handling the approval are listed here.

The approval view is divided into two different flow overviews.

- **Steps**: The processing of the approval takes place here and the current location of the approval is displayed. Read more about the steps of the approval.
- **Log**: An overview of the action flow and current status is displayed here. Read more about the activity log.

Change between the two views by clicking on either **Steps** or **Log**.

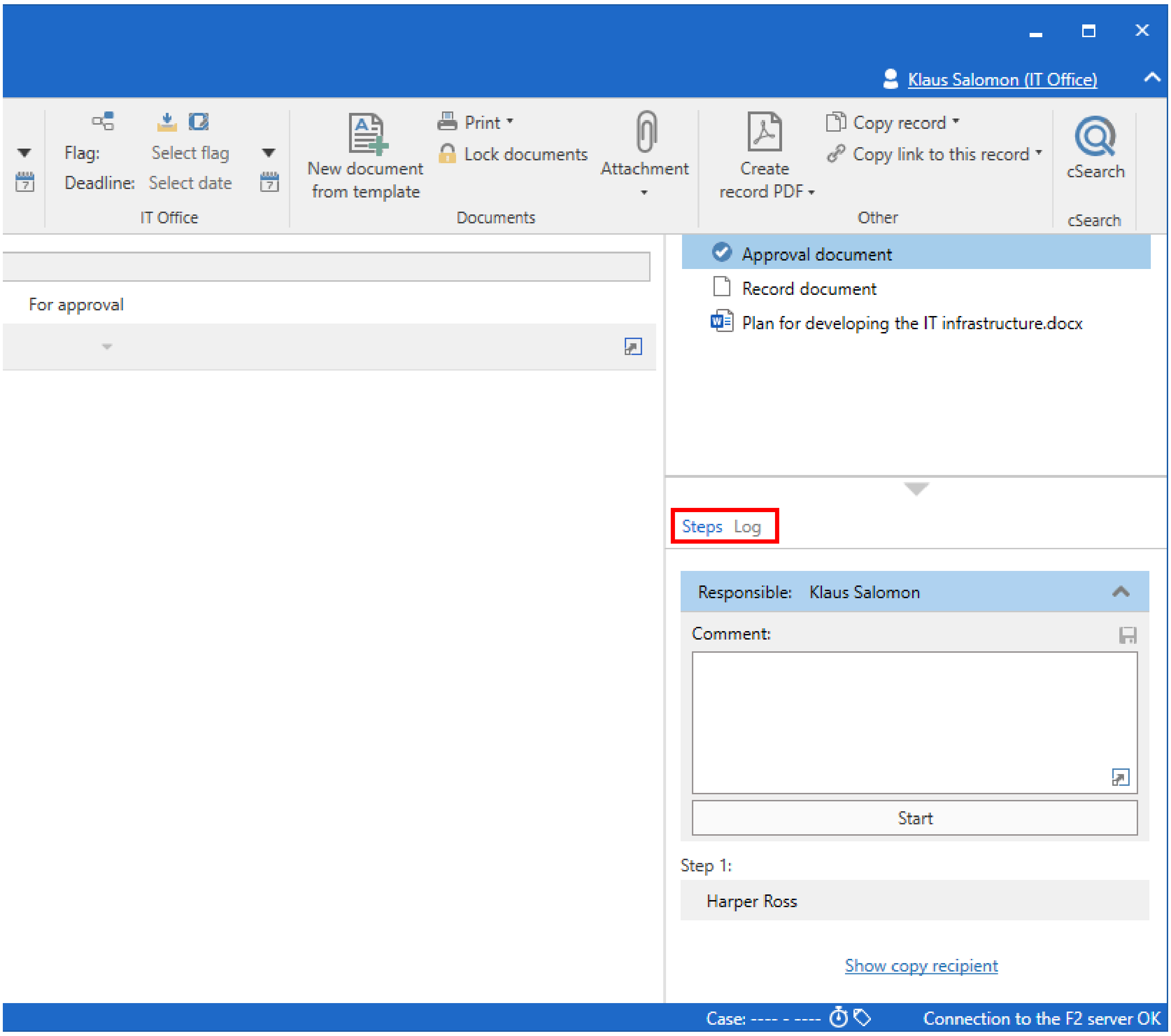



*Figure 31. Overview of the approval flow*

## Steps of the approval flow

Click **Steps** in the right side of the approval record to view the approval steps.

The approval flow is displayed step by step, each with its own box. The responsible user, i.e. the creator of the approval, is at the top of the list. Each remaining step represents a part of the approval with the chosen approver(s).

The colours indicate where in the flow the approval is currently located. In this example, Sienna Morton is blue, which means that the approval currently is in her hands.

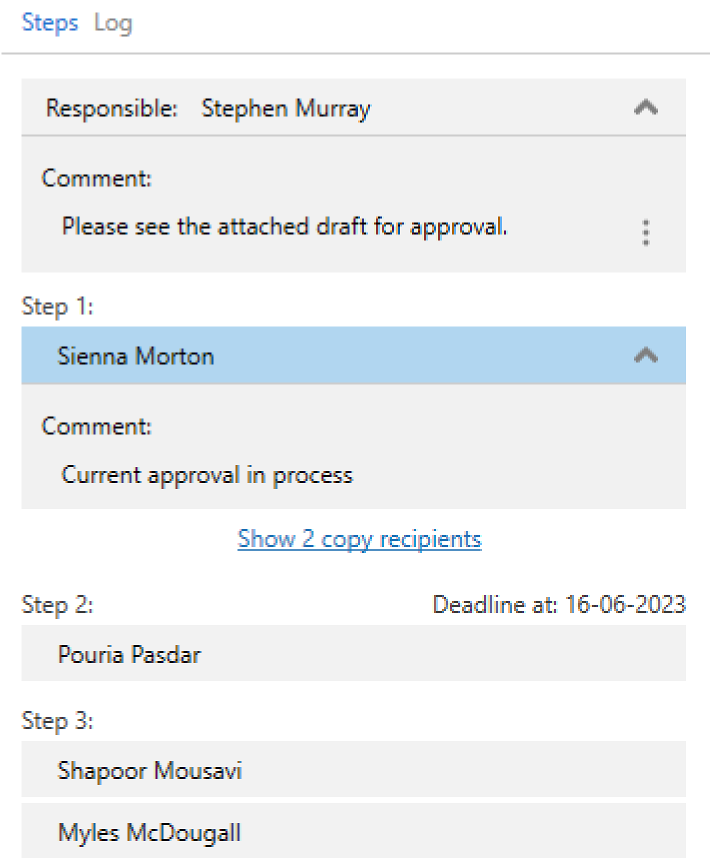


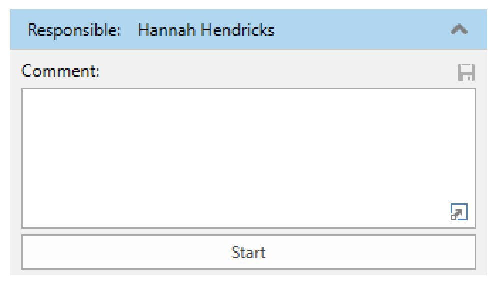

*Figure 32. Display of approval flow*

Click on the icon to expand the options that are available to either the responsible user or the approver. Click on the icon to hide the processing options.

| | |
|---|---|
| **NOTE** | These icons are only visible to the responsible user or approver when the approval is on the current approver's step. |

In the following table, the functionalities for the "Steps" overview are described.

**Responsible**



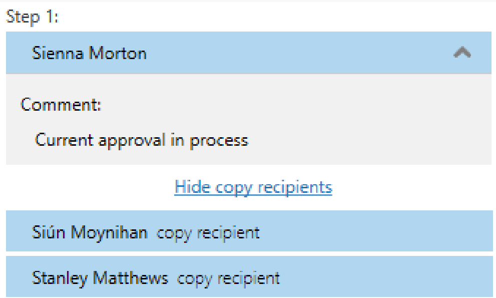

The responsible user, in this case Hannah Hendricks, creates and initiates the approval flow.

In the “Comment” field it is possible to write a comment with relevant information. Click on 💾 to save a comment without submitting it.

| | |
|---|---|
| **NOTE** | All approvers can see the comments when processing the approval. |

Click on **Start** to start the approval flow.

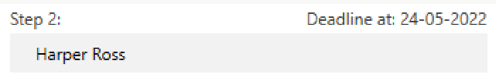
**Step 1**




Step 1 is the first approver. In this example, this is Sienna Morton.

This approval step has copy recipients - in this case, Siún Moynihan and Stanley Matthews.

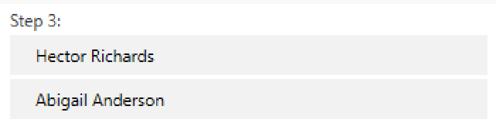
**Step 2**




Step 2 is the next approver in the approval flow - in this case, Harper Ross.

This approval step has a specified deadline for its approver (24/05/2022).

**Step 3**




Step 3 is the final step in the approval flow. There can be several approvers on the same step, in which case they are listed as shown in the example. Here the approvers are Hector Richards and Abigail Anderson.

Before an approver can perform any approval actions, they will be asked to save any unsaved changes to the record.

If the current approver makes changes to an approval record or any attached documents and then perform their approval action, the dialogue “Save changes?” appears. The current approver must then click **OK** to save the changes to the approval record.

As a result, the following approver, when receiving the approval, will not see an unnecessary notification stating that changes have been made.

# The activity log

Click on **Log** in the approval flow to switch from an overview of the approval flow to the activity log.

The activity log describes, line by line, the approval actions taken in the approval flow, as shown below.

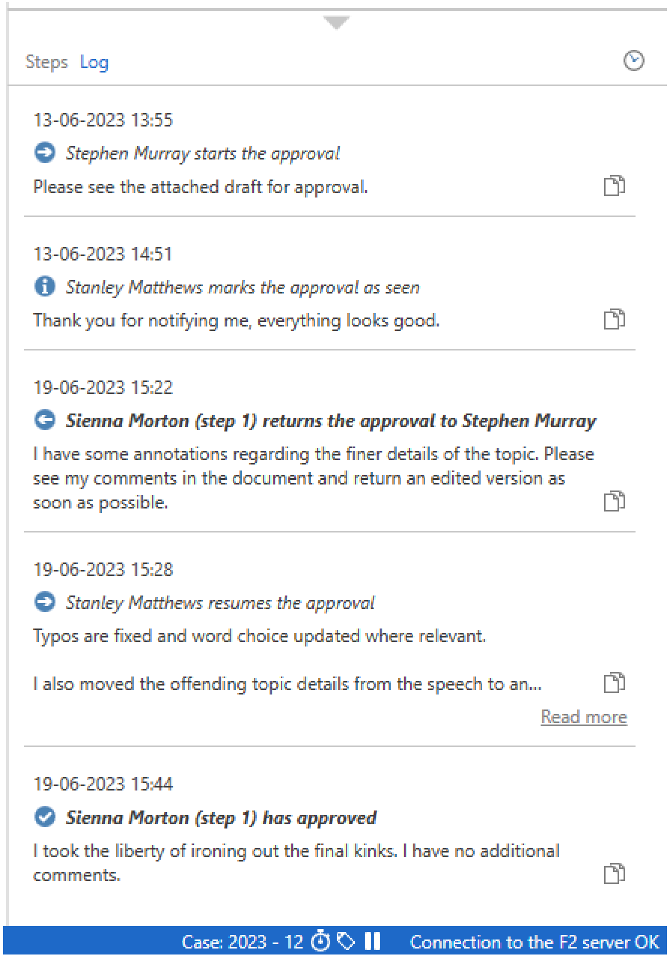


*Figure 33. Approval process activity log*

All changes made by the approver currently viewing the log are bolded.

Any comments to the individual approval steps can be copied from the activity log by clicking on the **Copy comment** icon. The copied text is saved to Windows' clipboard and can be inserted in e.g. a record or a chat by either pressing **Ctrl+V** or by right-clicking and choosing the **Paste** option where available.

Click on **Read more** to read the full comment.

## On behalf of in the activity log

It is possible to approve on behalf of another user if “On behalf of” privileges are granted. It is also possible to approve on behalf of a unit if the user’s unit is selected as approver.

The user who has processed the approval on behalf of another user or unit is displayed in the activity log.

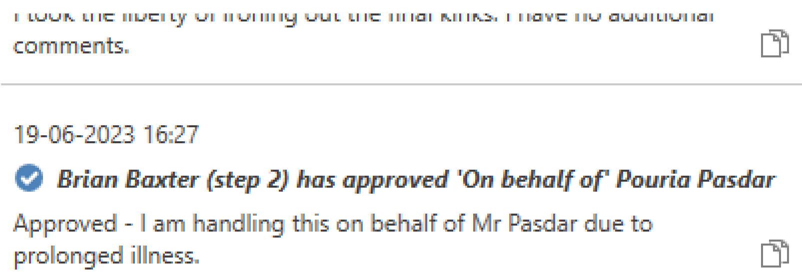



*Figure 34. The activity log with a user approving on behalf of someone else*

Read more about how “On behalf of”-privileges are granted.

## Viewing document versions

In the “Log” it is possible to view older versions of the approval record’s documents. Older versions can also be accessed via the “Approval” tab.

Click on the **Show document versions** icon to display the approval record version above the document selector. A set of numbers in parentheses appear in front of the documents indicating the version of each.

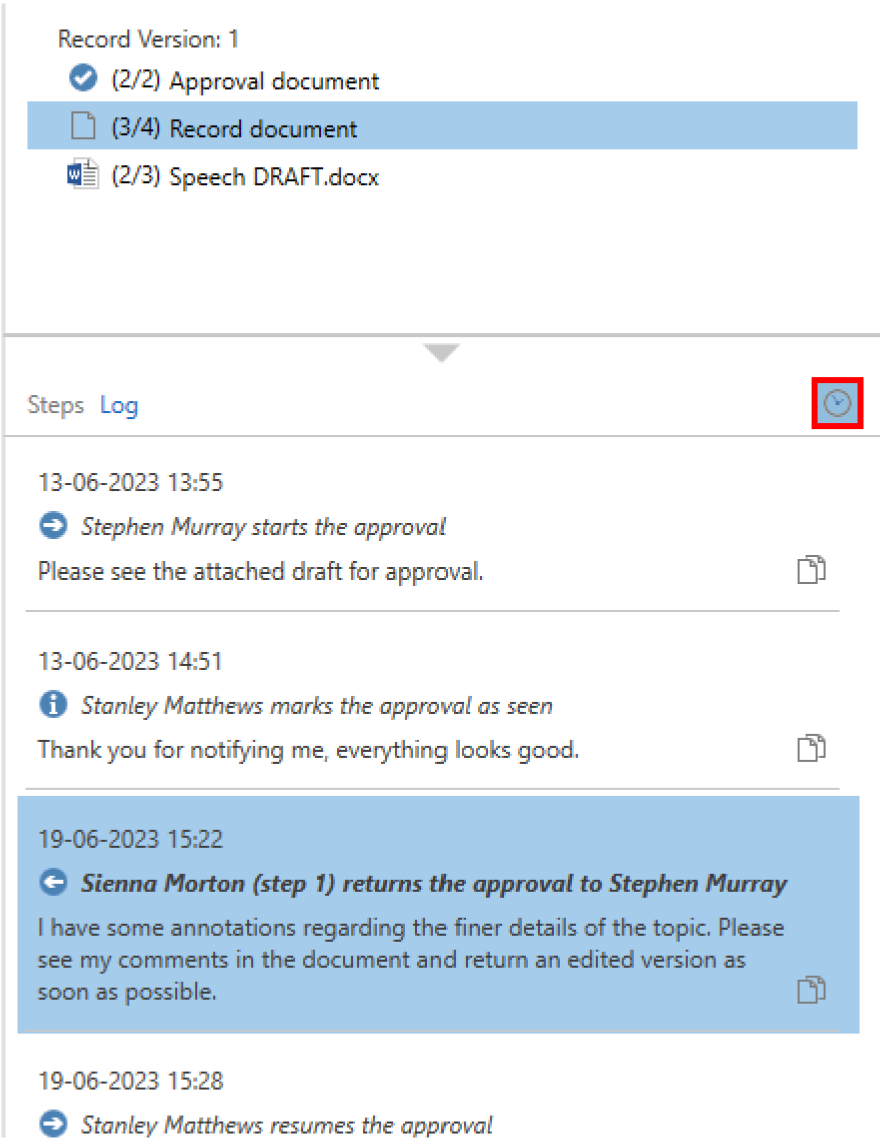



*Figure 35. Show document versions in activity log*

Click on a log entry when the "Show document versions" view has been selected to view the older versions of the record along with any attached documents. This makes it possible to follow the approval's development, the work process and previous document versions. The first number in the sequence shows the document version that will open if clicked. The latter number shows the total amount of versions that exists. For example, if the numbers read "(3/5)", the document will open in version three out of five.

The previous versions are also displayed in the preview so it is not necessary to open the document to view a previous version. This facilitates version comparison along with the ongoing preparation of approval documents.

A new document version is created every time a document is updated. A new record version is created when changes are made to the approval record itself or to the approval flow.

Exit version view by clicking on **Show document versions** again.

| | |
|---|---|
| **NOTE** | When "Show document versions" is turned on, it is not possible to make corrections to the approval record or to the approval flow. |

## Create a new record version when deleting documents

It is possible to create a new version of the record when any attached documents are deleted by another user.

When a document is deleted, a dialogue will appear allowing the user to create a new version of the record.

# Receiving and managing approvals

When an approval is started, the first approver on step 1 receives the approval in their inbox.

Hover the cursor over the approval icon in the result list to see:

- At which user the approval is pending.
- Whether the approval has been returned.

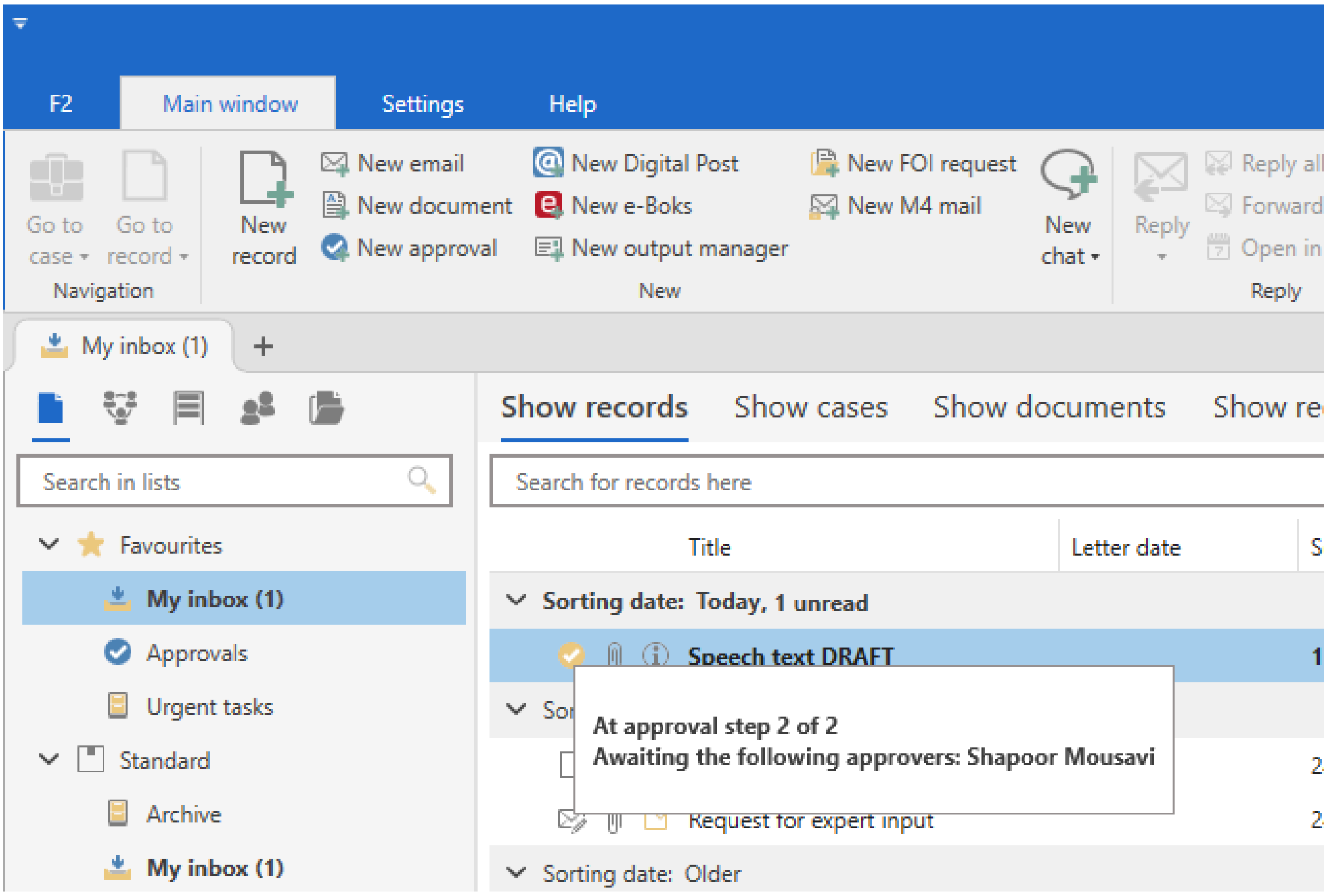


*Figure 36. Approval received in the inbox*

When the approval record is opened, the approver can start processing it. The approver has the following processing options:

- Return
- Approve.

The blue highlight in the approval flow shows that the approval is now on step 1, in this case with Sienna Morton. An approval can be undone, and it is also possible to withdraw and restart an approval process.

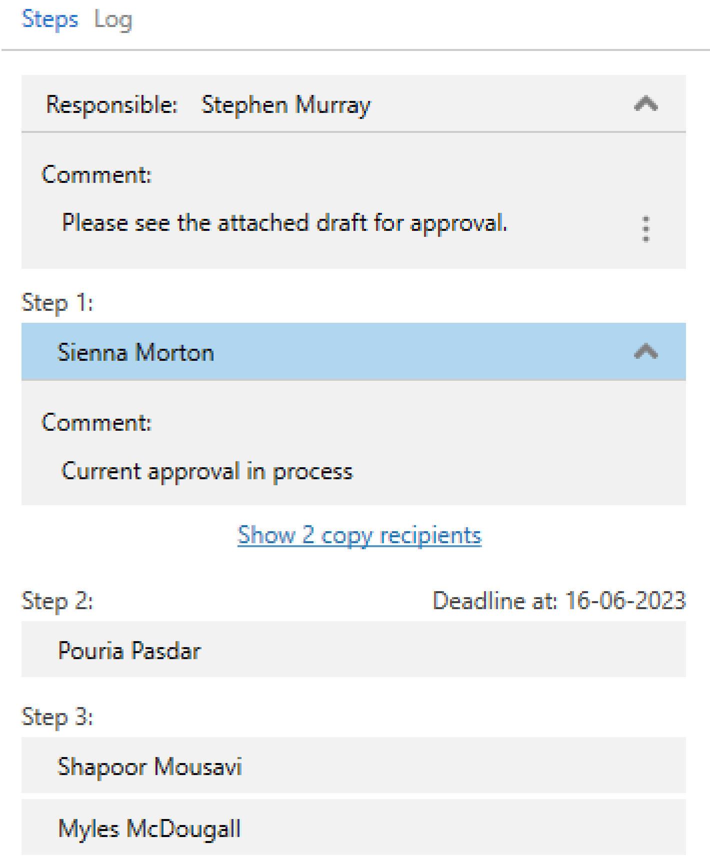
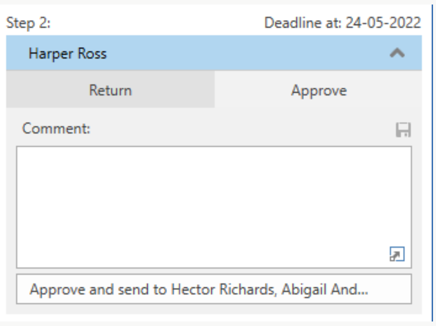



*Figure 37. Display of approval process*

Read more about this in section Return, undo, and withdraw an approval.

The table below describes the approver's processing options.

**Approve**



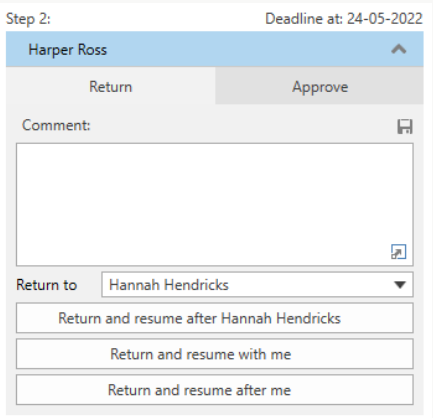

Select the “Approve” tab to approve.

It is possible to add a comment in the “Comment” field.

Click on **Approve and send to [username]** to send the approval to the next step in the flow - in this case, step 3.

When the user on the last step clicks on **Approve**, the approval is final and the approval flow is then complete.

**Return**




Select the “Return” tab to return the approval.

It is possible to add a comment in the “Comment” field.

Select the step to which the approval must be returned in the “Return to” drop-down menu. Any approval step except for the user’s own can be selected.

By default, the name of the responsible user is shown in the “Return to” field.

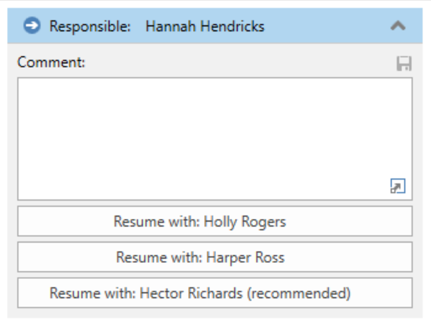
Click on **Return and resume after [selected user name]** to return the approval to the selected user, in this case Hannah Hendricks.

The approval flow starts over from this user, and the record must be approved again on all subsequent steps.

**Return and resume with me** returns the approval to the specified user (here to the responsible user: Hannah Hendricks). After processing, the approval returns to the current user, i.e. Harper Ross on step 2, skipping any in-between steps.

**Return and resume after me** (conditional approval): The approval is returned (here to the responsible user: Hannah Hendricks), and after processing the approval flow is resumed after the current approver’s step, i.e. step 3, as if the approval had just been approved on step 2.

**Resume with**




The “Resume with” option is displayed when an approval has been returned, undone or withdrawn.

Use “Resume with” to restart the approval process.

The responsible user/approver has the following options:

**To restart the approval process and go through all approval steps again:** In other words, the approval is resumed with Holly Rogers (step 1).

**To skip the approval step before the current approver’s own approval step** (“Resume with me”): The approval is resumed with Harper Ross (step 2) and step 1 (Holly Rogers) is skipped.

**To resume the approval flow after the current approver’s step:** Harper Ross has approved conditionally, and the responsible user is advised to resume the approval process with Hector Richards (step 3).

The return options depend on the given approval step and on the recommendations of previous approvers.

**NOTE** The responsible user does not have to follow the recommendation if there are several options for resuming the flow.

If the “Changes have been made to record documents/metadata” notification is displayed, changes have been made after the approval has been sent to the current step.

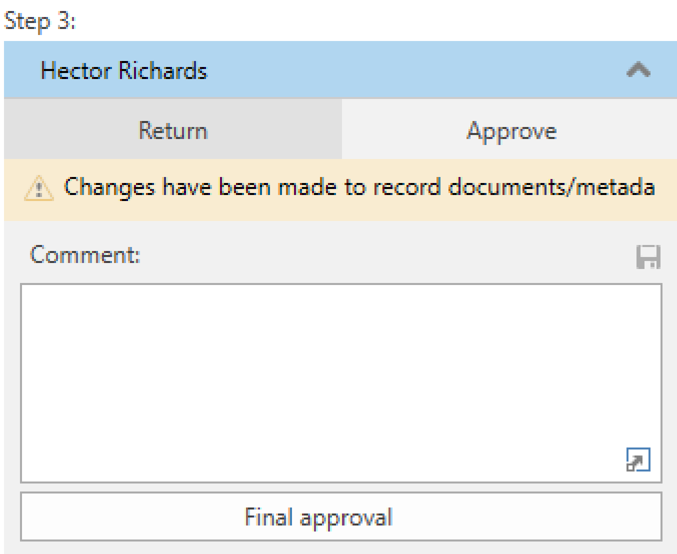



*Figure 38. Warning that changes have been made to documents or metadata*

Click on the triangular warning symbol to view an account of the changes.


*Figure 39. Changes to the record document/metadata*

# Return, undo, and withdraw an approval

When an approval is returned, undone, or withdrawn, the approval flow temporarily stops.

## Returning an approval

By clicking **Return**, the approval returns to a previous step with a notification that the approval cannot be approved. This can be done in three different ways, each of which indicates the degree of changes necessary before the approval can be approved (see the table above).

- **Return and resume after [user name]**: The selected return recipient starts the approval flow from their step and the approval must go through all approval steps again (complete return).
- **Return and resume with me**: The approval is returned to a previous step in the approval flow. The return recipient then sends the approval back to the current approver (return for correction).
- **Return and resume after me**: The approval is returned for minor corrections before the approval flow continues to the next step in the original flow (conditional approval).

When returning, the approver has the option to add a comment on why the approval is returned.

When the approval is returned, the approval process stops temporarily and must be resumed after the reason for the return has been resolved.

## Undoing an approval

“Undo” is used when an approver wants to revert their approval and bring back the approval to their step from a subsequent step. To undo an approval, click the three dots and then **Undo approval**.

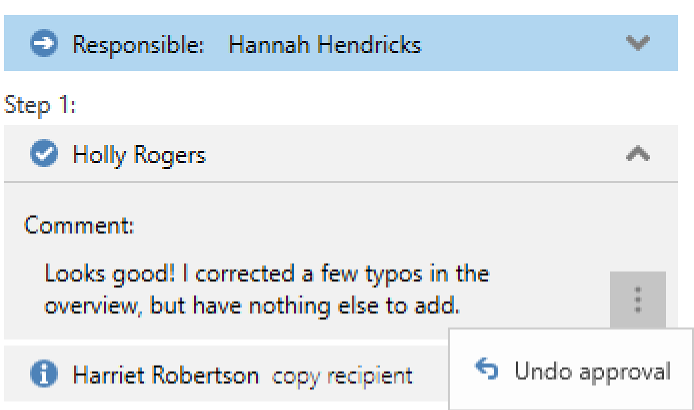



*Figure 40. Undo approval*

The approval flow is thereby temporarily stopped. This can only be done if the approval has not been finally approved. The approver can only undo their own approval.

## Withdrawing an approval

Unlike undoing, withdrawing an approval covers the entire flow and does not just undo a single step. When an approval is withdrawn, it is reverted to the user responsible for creating the approval. To withdraw an approval, click on the three dots on the step of the responsible user and then **Undo start**. The responsible user may withdraw their approval at any time.

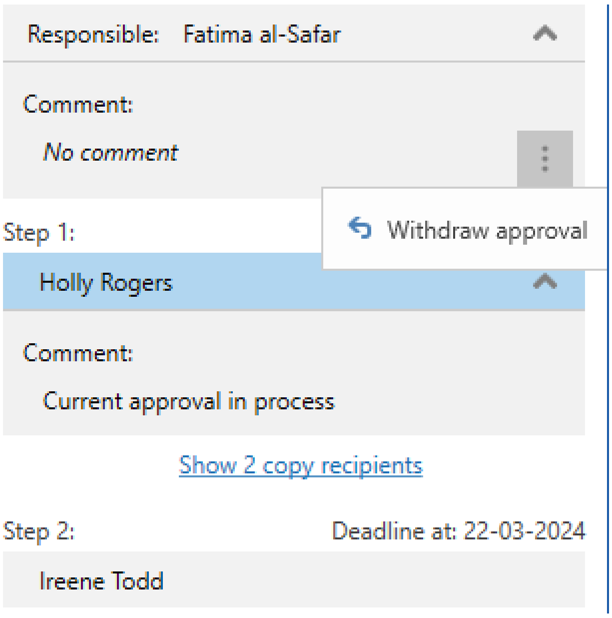



*Figure 41. Withdraw an approval by clicking "Undo start"*

Withdrawing an approval temporarily stops the approval flow, but does not cancel an approval. A withdrawn approval can still be resumed.

## Resuming an approval

An approval that has been returned, undone or withdrawn is still in an active process and can therefore be resumed. To resume the approval, click on **Resume with: [Username]**.

# Make changes to an approval flow

Making changes to an approval flow is done via the “Approval” tab. The menu items are described below.

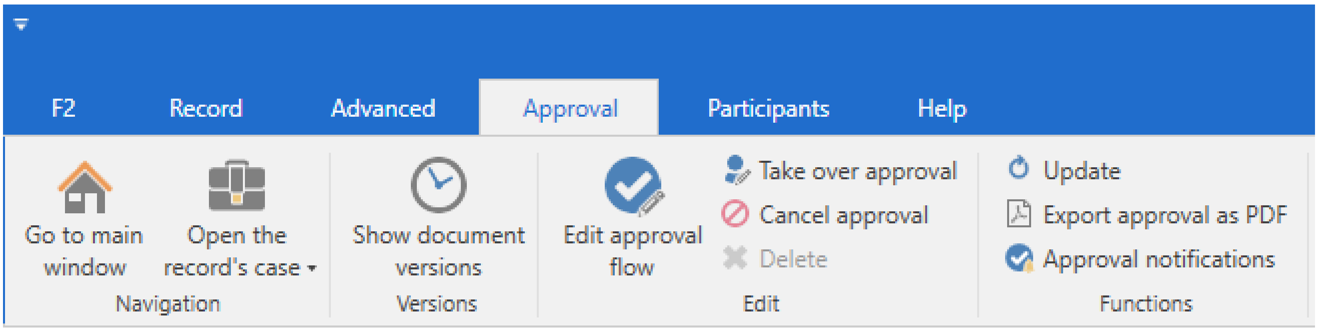
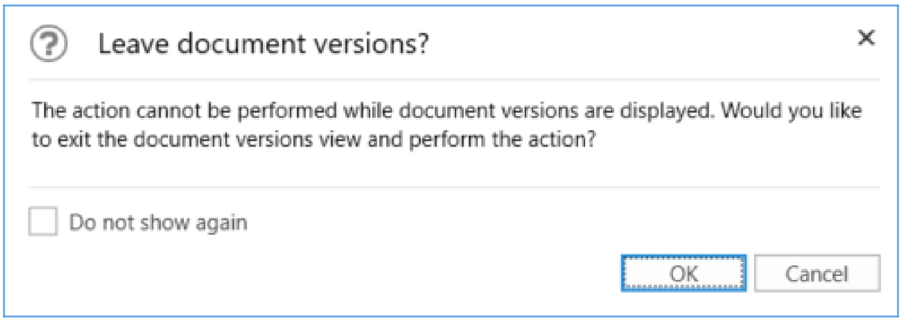
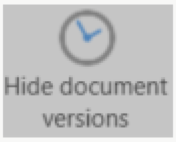



*Figure 42. Approval tab*

| Function | Description |
|---|---|
|  | Shows the current versions of the approval record's approval document, record document and, if applicable, attached documents in the document selector.<br><br>When viewing document versions, the approver cannot process the approval. The approver will receive a warning about this from F2. See the dialogue below.<br><br><br>*Figure 43. The "Leave document versions?" dialogue*<br><br>**NOTE** There is a corresponding function in the activity log. Read more in Viewing document versions. |
|  | Changes the menu item back to "Show document versions" and no longer displays the version numbers. |
|  | Makes it possible to modify an already initiated approval flow.<br><br>The approval flow can be entirely changed as long as it has not yet started.<br><br>If the approval has started, the already approved steps cannot be modified, but the pending steps can be edited, deleted and/or added to.<br><br>A finally approved approval cannot be modified. |

| Function | Description |
| --- | --- |
| | Approvers or approved steps cannot be removed and/or replaced. |
| Cancel approval | Stops an ongoing approval flow, and the approval is removed from the "Approvals" list in the main window.<br><br>When an approval is cancelled, a note is automatically created that states it has been cancelled and by whom.<br><br>Read more in the section Cancel, reopen, and delete an approval. |
| Reopen cancelled approval | Reopens a cancelled approval. The approval will be resumed from the step at which it was cancelled.<br><br>The approval is again displayed in the list of "Approvals" in the main window.<br><br>The menu item "Reopen cancelled approval" changes to "Cancel approval".<br><br>The approval note is updated with the information that the approval has been reopened after cancellation.<br><br>Read more in the section Cancel, reopen, and delete an approval. |
| Delete | Users with write access to the approval record can cancel and delete an approval. An approval can only be deleted after it has been cancelled.<br><br>Read more in the section Cancel, reopen, and delete an approval. |
| Update | Shows the latest changes/additions to the approval. |
| Export approval as PDF | Creates a PDF version of the current approval which contains the approval document and the approval information. Read more about this in the section Send approvals to external participants. |
| Approval notifications | Open the "Approval notifications" dialogue. The notification settings for users involved in the approval process are managed here. |

## Edit the approval flow

Provided that the approval is in process, changes can be made to the flow and to the approval metadata provided. It is not possible to edit steps that have already been processed.

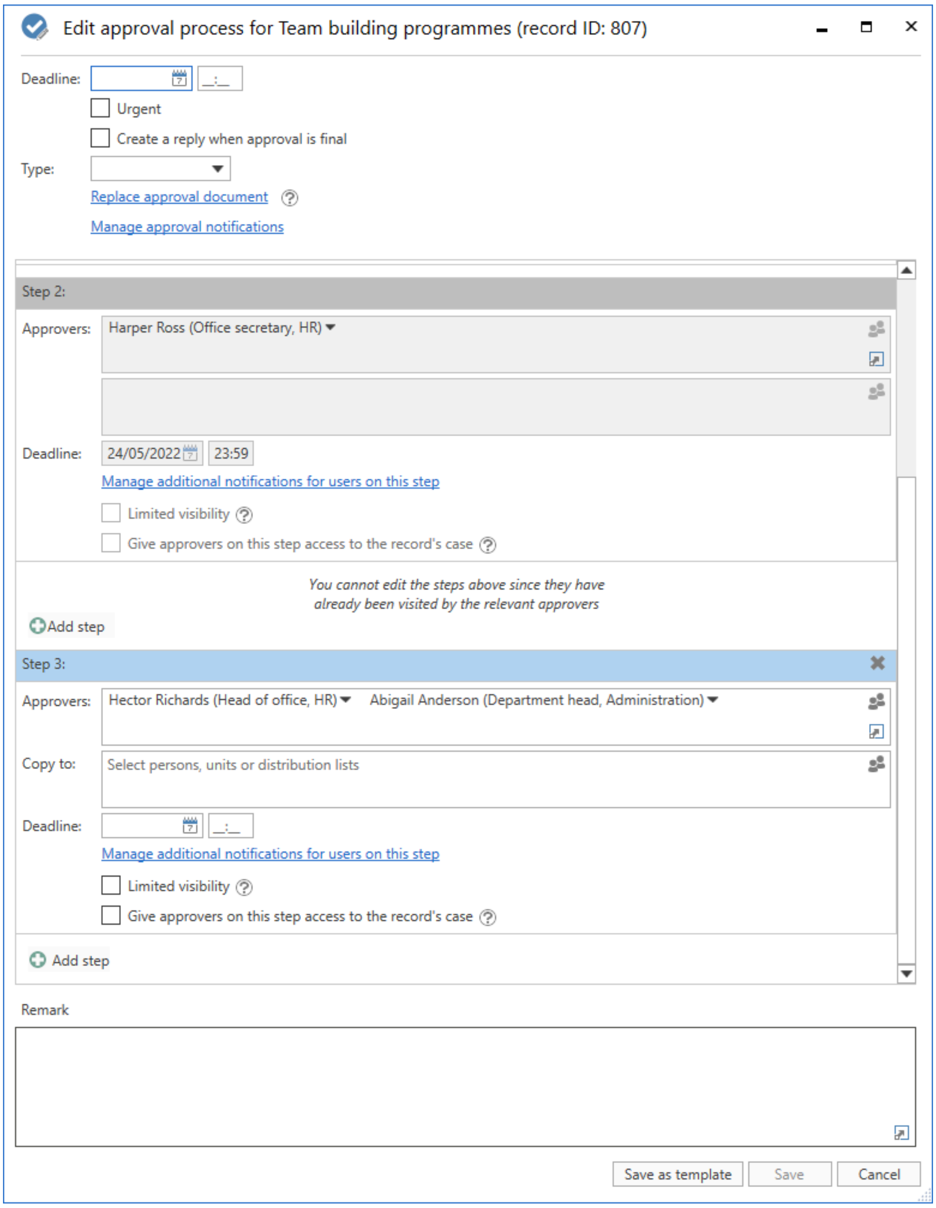



*Figure 44. Edit approval flow*

All corrections to the approval flow are listed in the activity log. Changes are not displayed in the activity log, but a note is created stating "[user name] edits the approval". A user who makes changes to the approval flow can elaborate on these changes in the comment field. The comment is displayed under the line "[user name] edits the approval", as shown below.

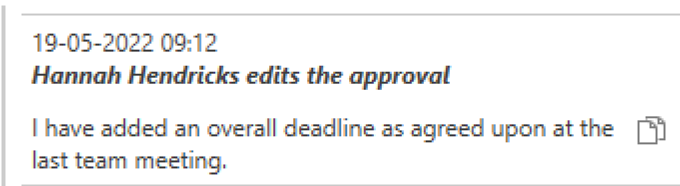



*Figure 45. Example of a comment to a change in the approval flow*

The changes can only be saved if the user has write access to the record.

# Take over an approval

Taking over an approval is useful in case an approver is absent or ill, so that their step can be either completely removed or replaced with another approver. Users with write access to the record can take over the approval and make changes to the flow.

Click on **Take over approval** in the “Approval” tab to open the dialogue below.

This dialogue shows the entire approval flow. The first field is the responsible user who created the approval, and the following fields denote the different steps. The blue field is the active step.

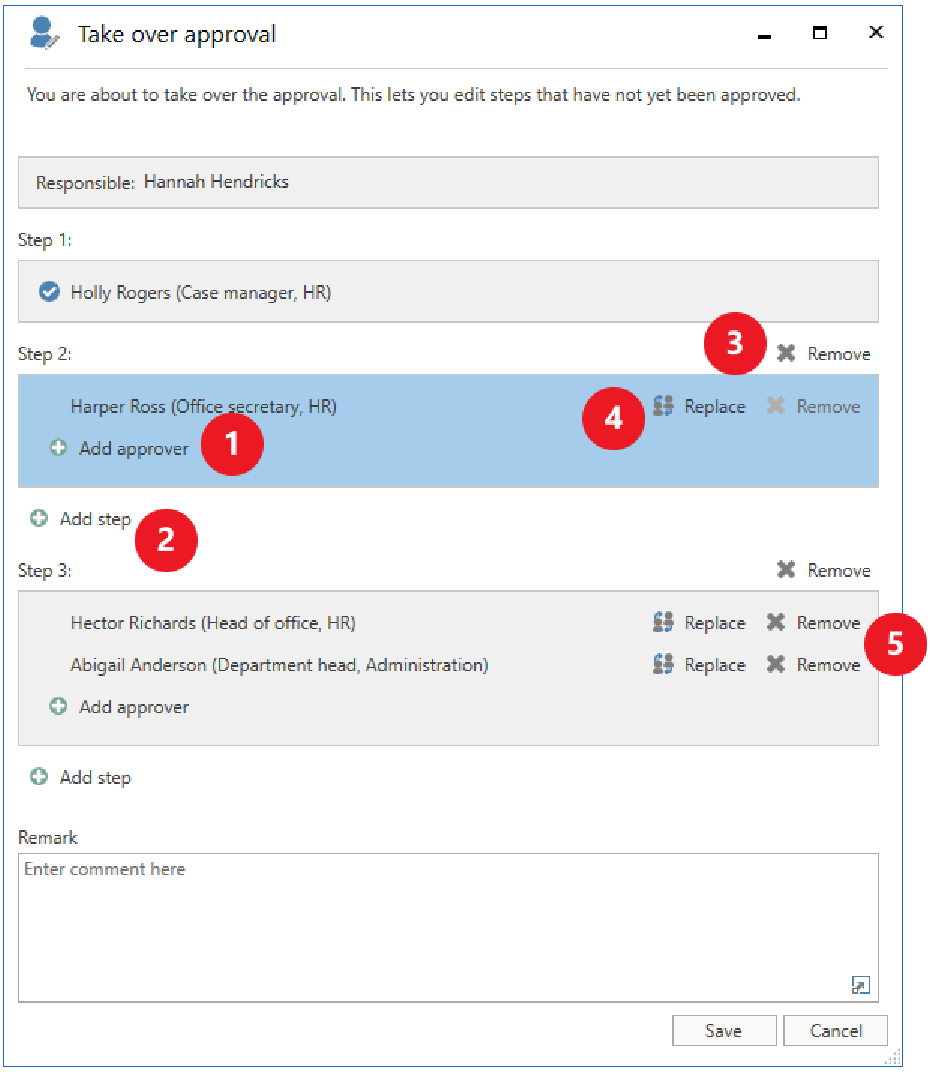


*Figure 46. Take over approval*

The recipient of the approval has the following options:

- Add approvers (1) to active and subsequent steps.
- Add steps (2) after the active step.
- Remove approval steps (3).
- Replace approvers (4).
- Remove approvers (5).

Approvers and approval steps cannot be replaced or removed if approval has already been granted at the step.

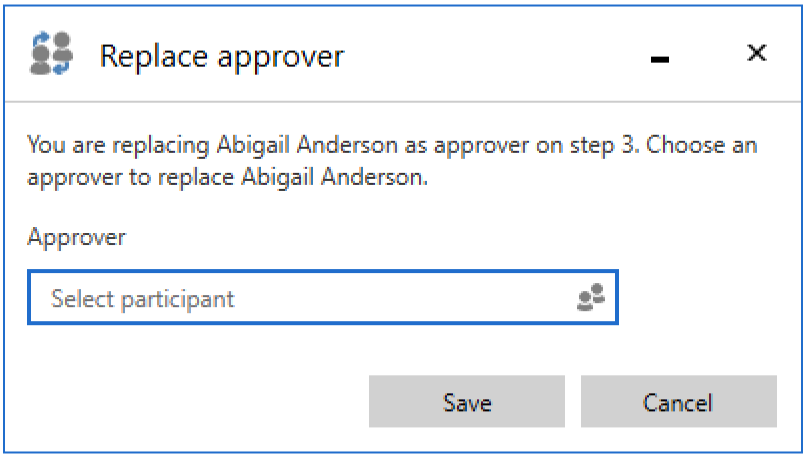



*Figure 47. Replace approver*

The user who makes changes with “Take over approval” can write a comment, which will appear in the activity log of the approval. If no comment is entered in the comment field, the activity log will only show who performed the takeover and on which step it occurred. The comment is therefore used to elaborate on the reason.

After clicking **Save** in the “Take over approval” dialogue, F2 asks the user to confirm.

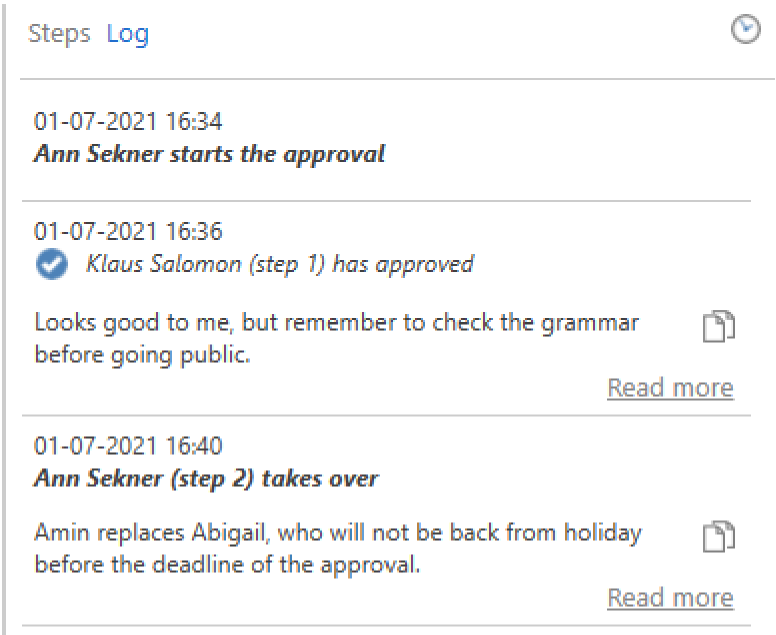



*Figure 48. Comment in the activity log*

F2 creates a note on the approval record when changes are made via “Take over approval”.

The note describes the action performed. Participants on the note include:

- The user who has taken over the approval and made changes.
- The user responsible for the approval.
- Approvers who have been removed from or replaced in the approval.

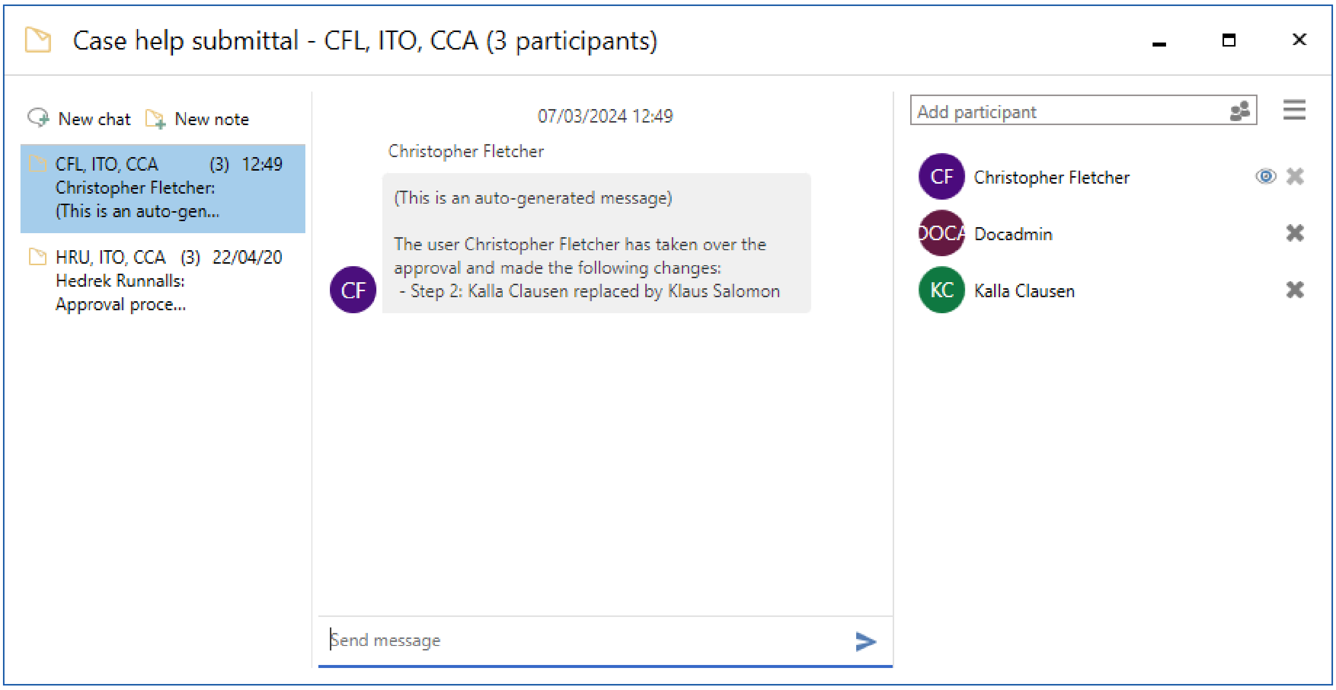



*Figure 49. Note describing approval changes*

# Restart approval

An approval can be restarted from the “Take over approval” dialogue, but only if it has been returned with the recommended actions “Return and resume with me” or “Return and resume after me”. Users can only restart an approval if they have full write access to its record.

Restarting the approval makes it possible to add steps, or add, replace or remove approvers in the entire approval process, not just the step of the returner.

If the returner has selected “Return and resume with me” or “Return and resume after me”, the **Restart from step X** button becomes visible in the dialogue. “X” corresponds to the step after the step to which the approval was returned. The figure below shows the button with the text “Restart from step 1” because the approval was returned to the responsible user, i.e. to the step before step 1.

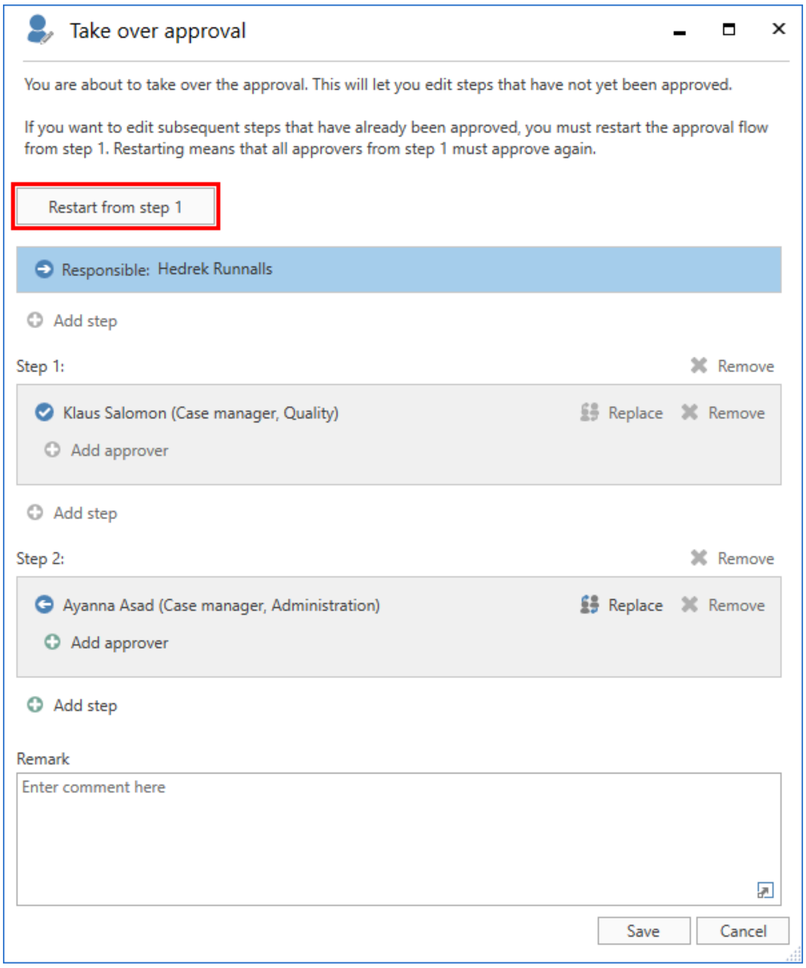



*Figure 50. The "Restart from step 1" button*

After clicking **Restart from step X**, it is possible to edit steps already approved, including the step from which the approval was returned. New steps can be added before and between existing steps.

It is not possible to remove the step from which the approval was returned, but its approvers can be replaced.

The figure below illustrates some of the options available when restarting an approval.

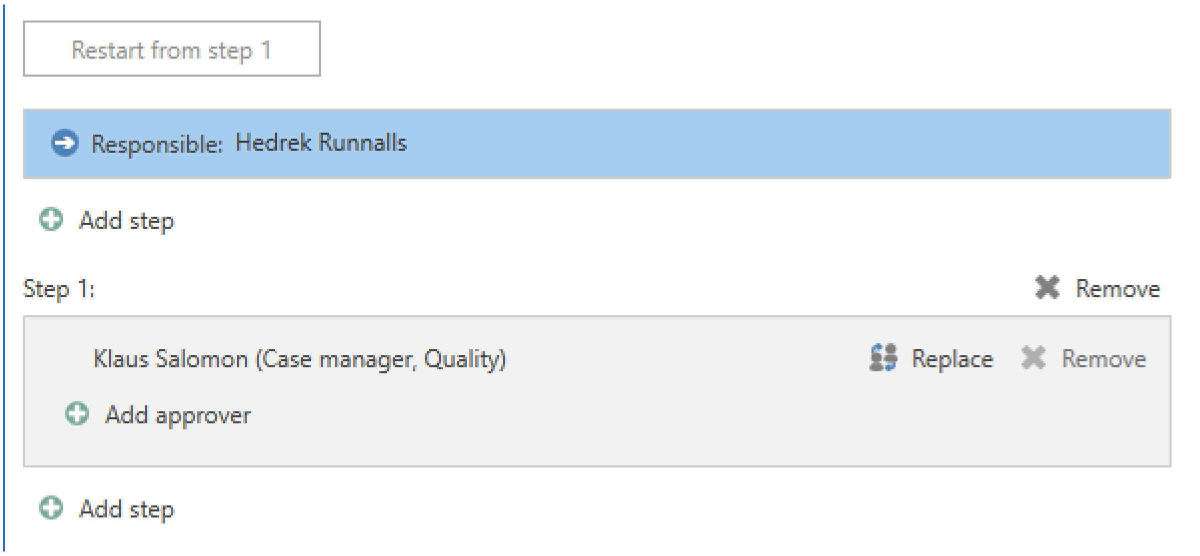



*Figure 51. Options available at approval restart*

**NOTE** The restart completely resets all prior approvals. This means that early approvers may have to reapprove if they are not replaced or removed.

## Cancel, reopen, and delete an approval

When an approval is cancelled, it is removed from the list of active approvals. In addition, a note regarding the cancellation of the approval is automatically generated. The following users are added as participants on the note:

- The user who cancelled the approval.
- The user who is responsible for the approval record.
- Any approvers who have already approved or returned the approval.

Additionally, the responsible user and any approvers receive the record in their inboxes to notify them of the cancellation.

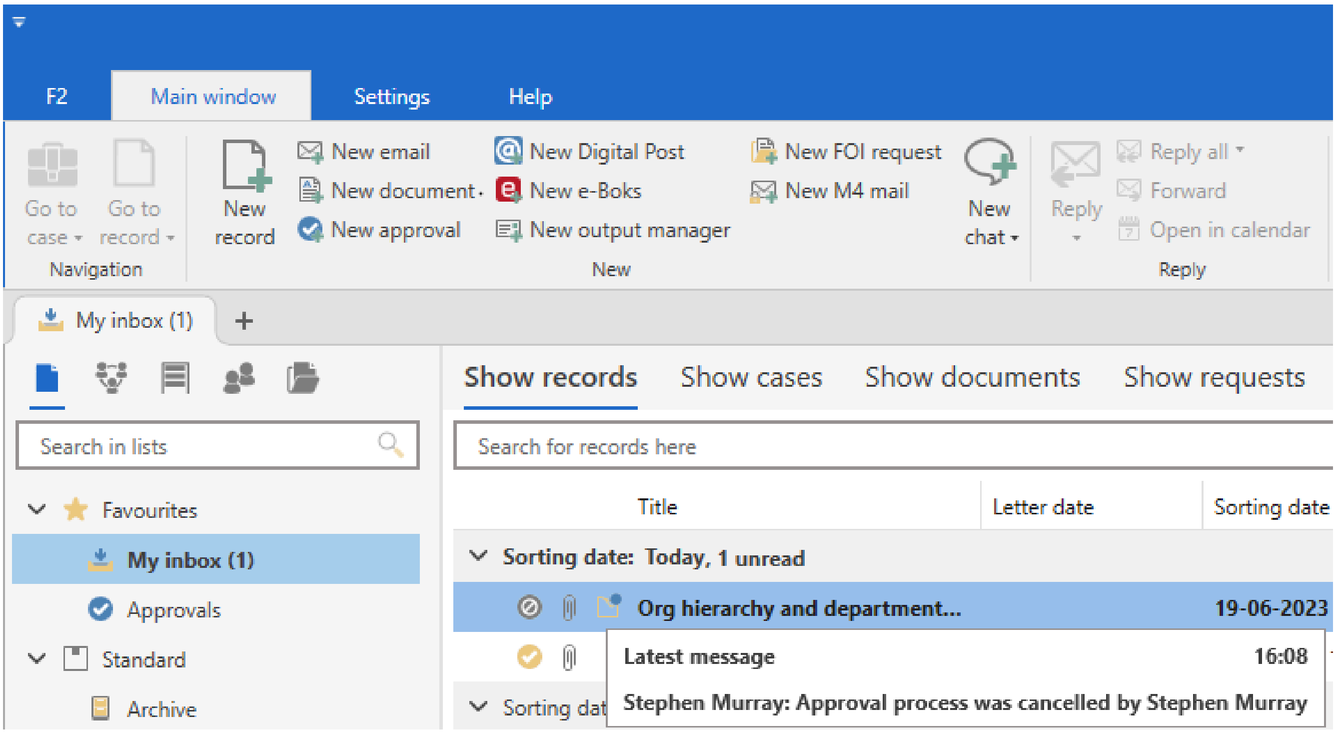



*Figure 52. Cancellation note shown in the responsible user's inbox*

The note is also displayed on the approval record and is visible to any user with access to the record.

Cancelled approvals are inactive, but can always be reopened. The approval record will keep existing and the created approval flow will still appear on the record.

Click on **Reopen** in the "Approval" tab to reactivate the approval and resume the approval flow. The approval document will be readded and a new note is added to notify users that the approval was reopened.

Approvals can only be deleted after they have been cancelled. F2 will ask for confirmation before deleting the approval. The deletion cannot be undone.

When an approval is deleted, the approval record becomes an ordinary record, but any documents, the record document, and other metadata are preserved. If needed, a new approval on the record can be created.

# Final approval

When the last approver receives the approval and clicks on **Final approval**, the approval is finally approved.

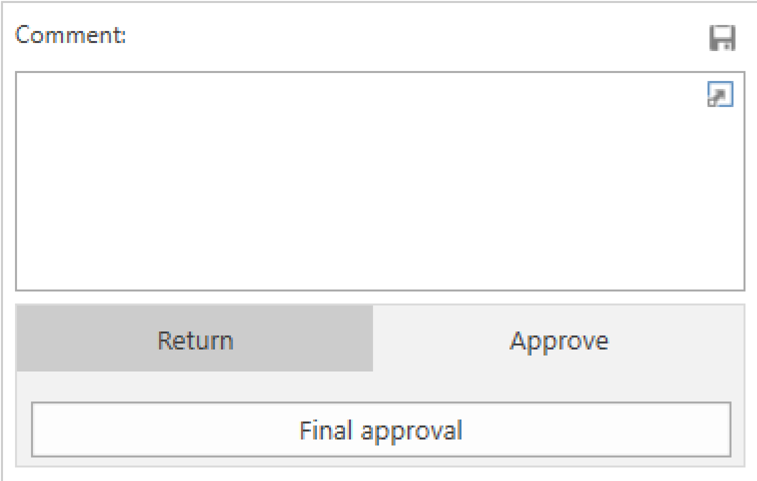



*Figure 53. Final approval*

The status of the approval then changes to completed, which is also evident from the approval icon in the result list. Hover the cursor over the approval icon to see that the approval has been finally approved and thus completed. The approval will disappear from the list of active approvals.

The responsible user receives the approval in their inbox when it has been finally approved.

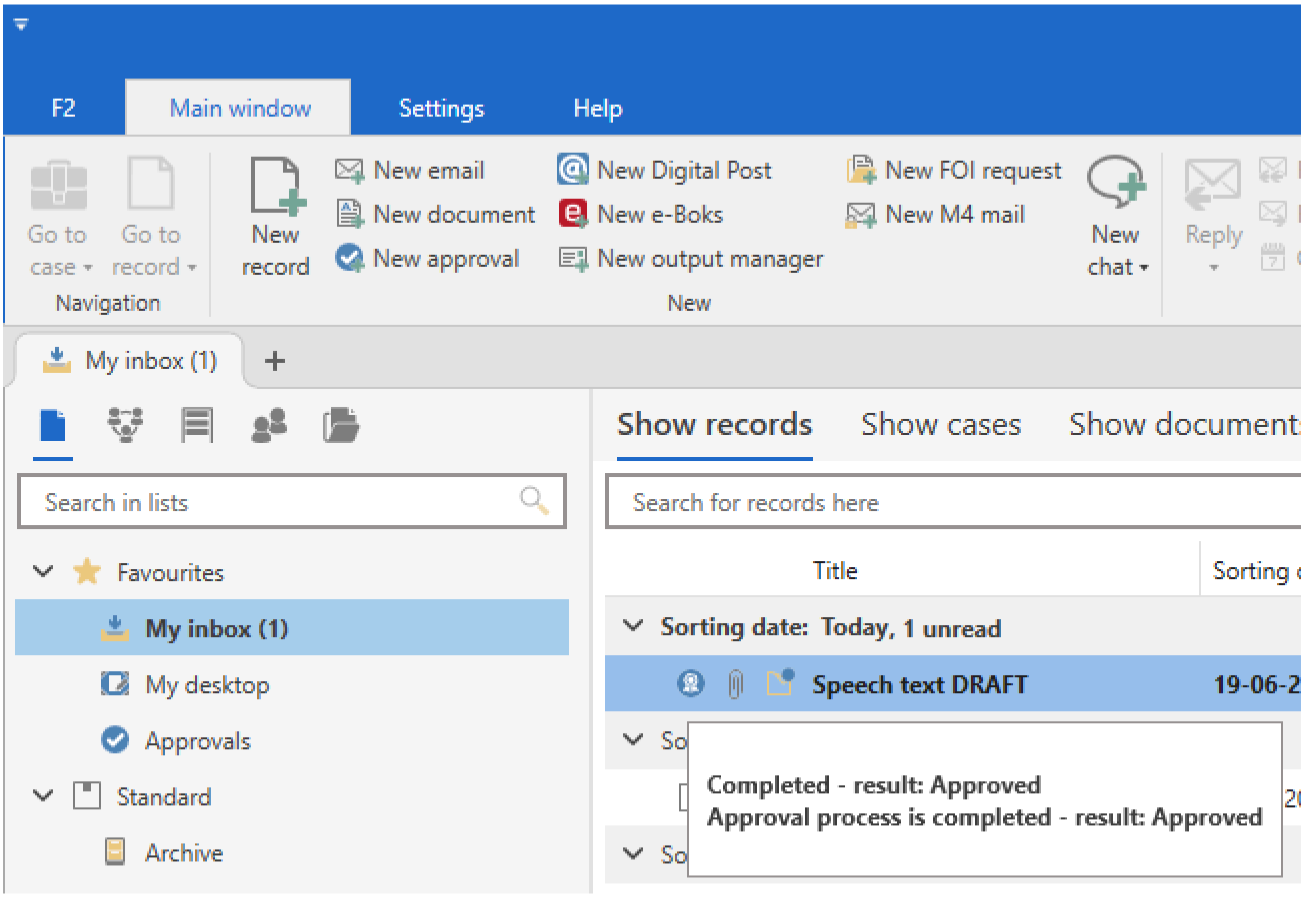


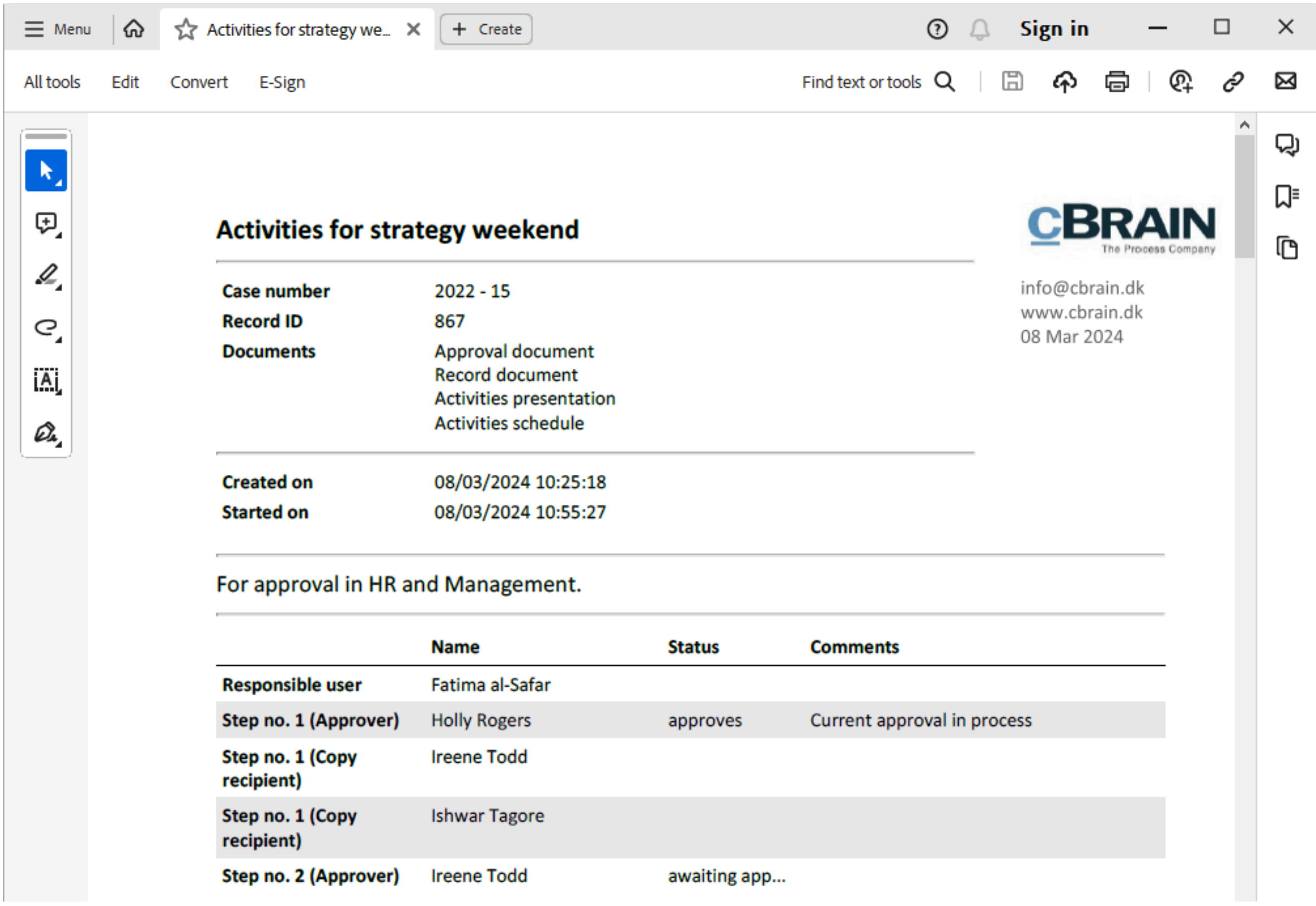

*Figure 54. Approval finally approved*

**NOTE** An approval which has been finally approved cannot be edited.

# Send approvals to external participants

If you want to send the approval record to an external recipient, you should be aware that the approval document and the approval information are not included when the record is sent as an ordinary email.

Click on **Export approval as PDF** in the “Approval” tab or on **Create record PDF** in the “Record” tab to generate a PDF that can be saved on the record. The approval document and information will be included on the first page of the generated PDF, as shown below.




**Activities for strategy weekend**

| | |
|---|---|
| **Case number** | 2022 - 15 |
| **Record ID** | 867 |
| **Documents** | Approval document<br>Record document<br>Activities presentation<br>Activities schedule |
| **Created on** | 08/03/2024 10:25:18 |
| **Started on** | 08/03/2024 10:55:27 |

For approval in HR and Management.

| | Name | Status | Comments |
|---|---|---|---|
| **Responsible user** | Fatima al-Safar | | |
| **Step no. 1 (Approver)** | Holly Rogers | approves | Current approval in process |
| **Step no. 1 (Copy recipient)** | Ireene Todd | | |
| **Step no. 1 (Copy recipient)** | Ishwar Tagore | | |
| **Step no. 2 (Approver)** | Ireene Todd | awaiting app... | |

*Figure 55. The approval document in a PDF file*

# Approval overview in F2

You have multiple options for gaining an overview of approval processes in your daily work with F2.

An overview of e.g. returned or completed approvals can be created by searching by approval record metadata.

Active approvals are always displayed in the “Approvals” list in the main window.

In the main window, an approval record can be identified by its circular approval icon, whose colour and content change depending on status. A detailed description of approval icons and their meaning is available in Approval icons.

## View active approvals

F2 is installed with the “Approvals” standard search in the main window.

Click on **Approvals** to display the current approvals that the user is authorised to view. An example of what it could look like is shown below.

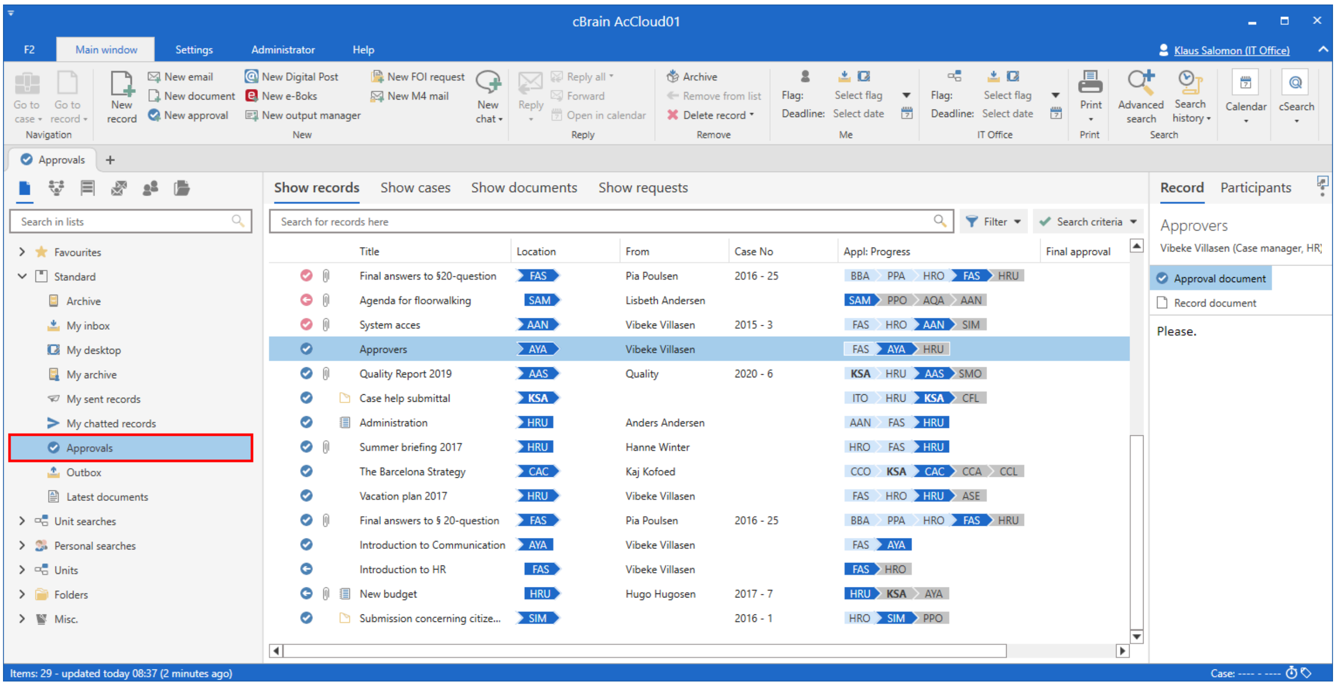



Figure 56. Overview of active approvals in the main window

## Approval columns

There are several columns in F2 which can be used when displaying the approvals in the result list:

| Column | Description |
|---|---|
| “Appl: Days left” | Displays the time in days until the deadline for the approval of a record. |
| “Appl: Progress” | Displays a colour coded overview of the approval progress with the current approver highlighted in blue. Any previous approvers are highlighted in light blue, while future approvers are grey. The users set as approvers can be identified by their initials. Your own initials are displayed in bold.<br><br>The user initials displayed in the "Location" and "Appl: Progress" columns are retrieved from the participant register. Administration of internal participants takes place in the "Units and users" dialogue. By default, the initials field in the participant register is updated/synchronised via AD (Active Directory). If this synchronisation does not occur, or if there are no initials in AD, the field will be filled with three asterisks (***).<br><br>**NOTE** If there are two or more approvers at the same approval step, a number corresponding to the number of approvers at that step is shown instead of initials. |
| “Approval deadline” | Displays the deadline for the approval. |
| "Days until my next deadline" | Displays the number of days until the deadline on your next step expires. |
| "Final approval" | Displays the timestamp of the final approval. |
| “Location” | Displays the current location of an approval. |
| "My approval step deadline" | Displays the deadline (if any) of the next step you are approving. |
| “Urgent” | Shows whether an approval has been marked as urgent. |

# Creating specific searches for approvals

In addition to the pre-defined search for active approvals, it is possible to generate personalised searches based on the metadata of approval processes created in F2. This is done in the following way:

- Click on **Archive** (1).
- Click on **Advanced search** in the main window ribbon (2) and open the “Approval process” search group.
- The search fields related to approvals are displayed (3). Fill in one or more of the fields depending on the wanted search criteria.
- Save the search by clicking on **Save search** (4).
- The search is then added to the “Personal searches” list (5).

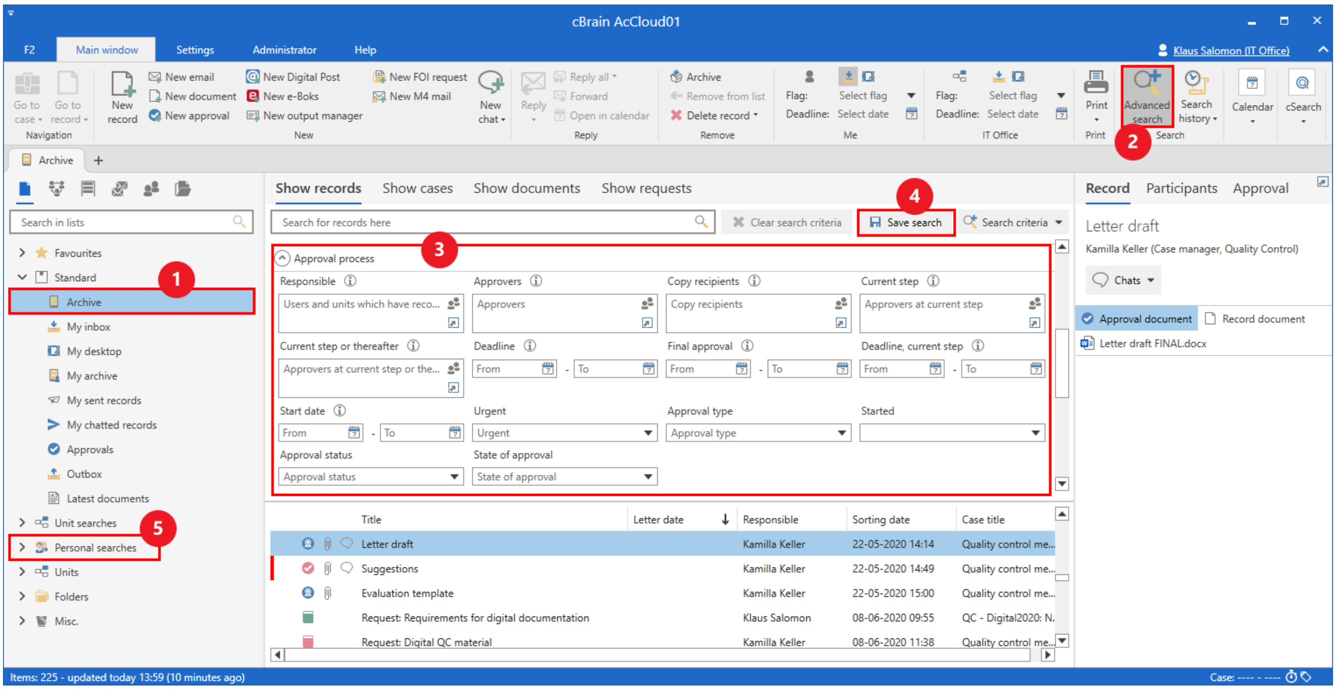



*Figure 57. Create a personal search list for approvals*

Depending on which search fields have been filled in, the user can perform specific approval searches. For example, it is possible to search for:

- My active approvals.
- My completed approvals.
- All approvals for which I am/have been responsible.
- Approval type.
- Approval status (returned, approved or conditionally approved).
- Approval deadline.

For more information on performing and saving searches in F2, see Searches.

## The "Approval process" search group

Below is a detailed description of the search options in the “Approval process” search group.

| Search field | Possible values | Description |
|---|---|---|
| “Responsible” | User<br>Unit<br>Me<br>My unit | Search for approvals for which the specified user or unit is responsible. |
| “Approvers” | User<br>Unit<br>Me<br>My unit | Search for approvals for which the specified user or unit is an approver. |
| "Copy recipients" | User<br>Unit<br>Me<br>My unit | Search for approvals for which the specified user or unit is a copy recipient. |
| “Current step” | User<br>Unit<br>Me<br>My unit | Search for records with the specified approver for the current approval step. |
| “Current step or thereafter” | User<br>Unit<br>Me<br>My unit | Search for records with the specified approver for either the current or a pending approval step. |

| Search field | Possible values | Description |
|---|---|---|
| | - [No. of days] | Fill in one or both date fields. Use **+** and **-** to define a dynamic period starting or ending a number of days from today.<br><br>Search for approvals with deadlines within the specified interval. |
| "Final Approval" | Date<br><br>Yesterday<br><br>Today<br><br>Tomorrow<br><br>Undefined<br><br>+ [No. of days]<br><br>- [No. of days] | Fill in one or both of the date fields. Use **+** and **–** to create a dynamic period that calculates a date a number of days forward or backward.<br><br>Search for approvals that are finally approved within the given interval. |
| “Deadline, current step” | Date<br><br>Yesterday<br><br>Today<br><br>Tomorrow<br><br>Undefined<br><br>+ [No. of days]<br><br>- [No. of days] | Fill in one or both date fields. Use **+** and **-** to define a dynamic period starting or ending a number of days from today.<br><br>Search for approvals with current step deadline within the specified interval. |
| “Start date” | Date<br><br>Yesterday<br><br>Today<br><br>Tomorrow<br><br>Undefined<br><br>+ [No. of days]<br><br>- [No. of days] | Fill in one or both date fields. Use **+** and **-** to define a dynamic period starting or ending a number of days from today.<br><br>Search for approvals that have been initiated during the specified interval. |

| Search field | Possible values | Description |
|---|---|---|
| “Approval type” | Value list created by an administrator. | Search for approvals of the specified type. |
| “Started” | Yes<br><br>No | Search for approvals that either have or have not been initiated. |
| “Approval status” | In process<br><br>Completed<br><br>Cancelled | Search for approvals that are either in process, completed or cancelled. |
| “State of approval” | Returned<br><br>Approved<br><br>Conditionally approved | Search for approvals that have either been returned, approved or conditionally approved. |

# Accessing approvals in the preview

Clicking on an approval record in the result list opens a preview of the record to the right. This requires the preview feature to be activated, which is done from the “Settings” tab.

Click on **Approval** in the preview to see an overview of the approval, along with a log of the approval process.

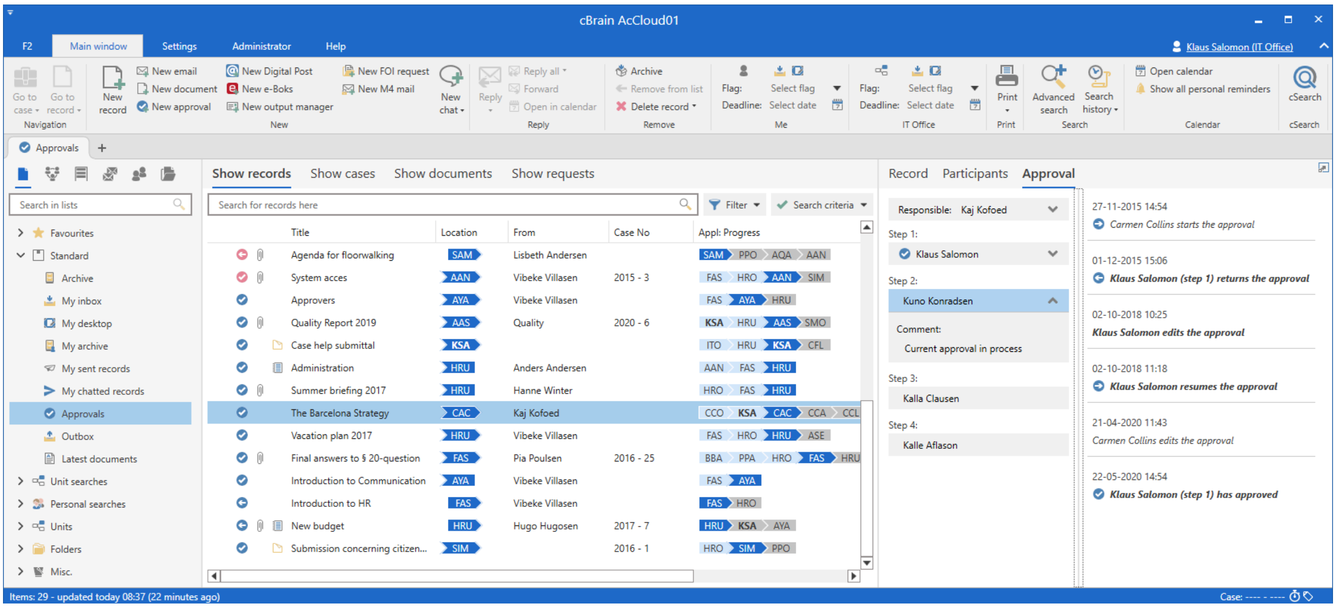



*Figure 58. Preview of an approval in the main window*

If the approval contains unsaved changes, and the user selects a different record in the list, F2 will ask the user if the approval record’s changes should be saved. It is not possible to undo a preview change. Therefore, it is important to either save or discard changes before changing previews.

# Approval icons

An approval on a record is displayed with an icon providing information about its status. The status icon appears in a list, e.g. “My inbox”, in the main window’s result list.

Below is a complete overview of the approval icons in F2 Approvals as well as their meaning.

| Icon | Description |
|---|---|
|  | Approval without deadline. |
|  | Active approval with a deadline of more than seven days. |
|  | Active approval with a deadline of less than seven days. |
|  | Active approval with an exceeded deadline. |
|  | Started or resumed approval. |
|  | Returned approval without deadline. |
|  | Returned approval with a deadline of more than seven days. |
|  | Returned approval with a deadline of less than seven days. |
|  | Returned approval with an exceeded deadline. |
|  | Copy recipient has marked the approval as read. |
|  | Cancelled approval. |
|  | Finally approved approval. |

# F2 Approvals configuration options

F2 Approvals can be configured to fit the needs of the individual organisation. The following can be configured in cooperation with cBrain:

- Decide if users have the option of creating a “New empty approval flow”. The organisation can decide whether users must use an existing approval template when creating a new approval or if they can create personal approval templates.
- The organisation can decide that only users with the “Template administrator” privilege can save approval templates.
- Select a default time stamp, which is automatically filled in when an approval deadline is set.
- Decide whether it is possible to mark an approval as urgent. The “Urgent” checkbox is then visible when creating a new approval.
- Decide whether parallel approvers on an approval step are allowed, i.e. whether multiple approvers can be added to the same step of an approval flow.
- Define one or more templates for the approval document. Users can choose a new approval document by clicking “Replace approval document” when creating or editing an approval process. Additionally, approval documents can be linked to specific approval templates.
- Decide whether it is possible to add an approval on an already existing record. The module can be configured so new approvals cannot be created on records that already exist. Approvals can then only be created via the “Add approval” option from either the main window or the case window.
- Select which options are available when creating approvals with or without a record document. The following can be configured:
  - Whether a standard approval is created with or without a record document.
  - Whether a user is able to create the approval without a record document.
  - Whether a user is able to create a record document after the approval has been created.
- Decide if it is possible to create and edit approvals using F2 Touch using parts of the approval functionality from F2 Desktop. By default, it is not possible to create or edit approvals in F2 Touch.
- Decide whether a record can be deleted if it contains an active approval.
- Decide whether a new version of the record is created following each approval action.
- Decide whether a warning appears to a user who edits a record with an ongoing approval process. The warning will appear if the user is not an approver on the current step.
- Decide whether users are warned when they attempt to send records with an ongoing approval process. This configuration only applies to F2 Desktop and the warning is only displayed here.
- Select the default notification settings for the approval’s responsible user. The configuration has three options:

- The responsible user receives no notifications when approvers return or approve, i.e. at step changes. This is the default setting.
- The responsible user is notified of step changes if the approver on the step added a comment.
- The responsible user is notified of all step changes.

| | |
|---|---|
| **NOTE** | The above list of configurations is not exhaustive. cBrain recommends that all configurations are made in cooperation with cBrain. |