Approvals Tool Manual

WorkDo Tool Guide

V.190712

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I Tools (In Do Page)

WorkDo has many tools in the Do page of different levels within the workplace. This means workplace, groups and buddies all have a specific Do button and set of tools to use. Below is Table I-1 that shows which tools are available at which level.

Tools such as HR, Leave, Expenses, Approvals and Conf. Rm are set to activate once you created a workplace while other tools such as Attendance, Leave, Leave Pro, Overtime, Expenses and Approvals (depend on HR) need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ Table I-1. WorkDo Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Attendance	●	x	x	HR
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Overtime	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Shift	●	x	x	
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	
Phonebook	●	●	●	

Tool	Workplace	Group	Buddy	Dependency
We Buy	●	●	x	
IOU	●	●	x	

II Approvals: The Real-Time Decision Maker Is Here

Although WorkDo Do tools offer a set of preset settings that can be fitted into any company organization and welfare program, it is also flexible enough for anyone to change these settings to create their cloud team collaboration workplace. Remember, the HR tool is fundamental to all the settings for you to realize an all-in-one workplace! Once you have set company' s organization, work hours, employee profiles, company calendar, etcetera, your settings will be automatically applied to all other Do tools, it' s that simple!

The Approvals tool eliminates the hassle that is the outdated paper approvals. Gone, is the waiting game that wastes valuable time for action. Now you can send approvals to designated managers and track their progress in real-time. This dramatically cuts down the time for any important decision-making process, allowing you to put more energy and focus into the things that really demand your attention.

To streamline the approval process, this tool is tied to the HR tool for the default approval flow as seen in Table II-1; therefore, please refer to the Human Resource Manual to complete the initial settings.

▼ Table II-1. Approval HR Dependencies

HR Setting	Attendance	Leave	Leave Pro	Overtime	Expenses	Approvals
Departments	●	●	●	●	●	●
Work Hours	●	x	●	●	x	x
Employee Types	x	x	●	●	x	x
Deputy	x	●	●		x	x
Approver	x	x	x		●	●
Employee Profiles	●	●	●	●	●	●
Company Calendar	●	x	●	●	x	x

III Set Up

In this section, we will guide you on how to use the Approvals tool. The web interface is more comprehensive over the app interface, but you can choose your preferred device to set up Approvals. This guide will only be focused on the web interface.

The process includes 3 stages: tool activation, HR settings and start as shown below. The request approval process and deputies depend the HR tool hence please see the Human Resource Manual for the HR tool settings.

Tool Activation

Set workplace admins
Activate HR
Activate Approvals

HR Settings

Please see
Human Resource Manual

Start

Set categories
Apply / Cancel / Withdraw
Approve
Processed
Export

▲ Image III-1. Setup Process

STEP 1． Tool Activation

In order to ensure information is compartmentalized among all members in the workplace, WorkDo was designed to have workplace admins and tool admins (Table Step 1-1).

Workplace admins include an owner and multiple admins that can adjust workplace settings and are usually management and IT employees. Tool Admins [1] manage the data others see per tool. Tool activation is done by workplace admins.

[1] For more information on tool admin authorities, please see STEP 1-b Set Up Tool Roles.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●

a. Confirm/Assign Workplace Admins

As you can see from Table Step 1-1, workplace admins are assigned by the owner or other admins. If you are a workplace admin, you can skip this portion and go to step 1-b Set Up Tool Roles, and if you need to be a workplace admin, please have one of the admins to assign you the role. You can find out whether you are a workplace admin by following the steps below.

Manage Workplace Admins

1. Ask the workplace admins to go to the Workplace page.
2. Click the gear icon to enter Workplace Settings.
3. Click Manage Admin, the red crown marks the owner and the blue crown marks the admin.
4. Click Add Admin.
5. Choose member(s).
6. Click Done and wait for the success message.
7. Now refresh the page to see admin-only menus.

b. Set Up Tool Roles

WorkDo has many tools that require different members within the workplace to take on the roles of Tool Admin or HR Staff to manage information. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

There are three types of roles, including No Role, Member and Tool Admin. Members could submit approvals, while Tool Admins could submit approvals as well as configure related settings. Upon tool activation, the system will automatically assign all everyone as members and workplace admins as Tool Admin(s). If your tool authority is set to No Role, the Approvals tool will not appear in your tool box.

In addition, your responsibilities in Approvals are tied to your department and level of management in the HR tool settings, therefore, upon using the Approvals, please see STEP 2-b in the Human Resource Manual to complete its settings.

Manage Tool Roles

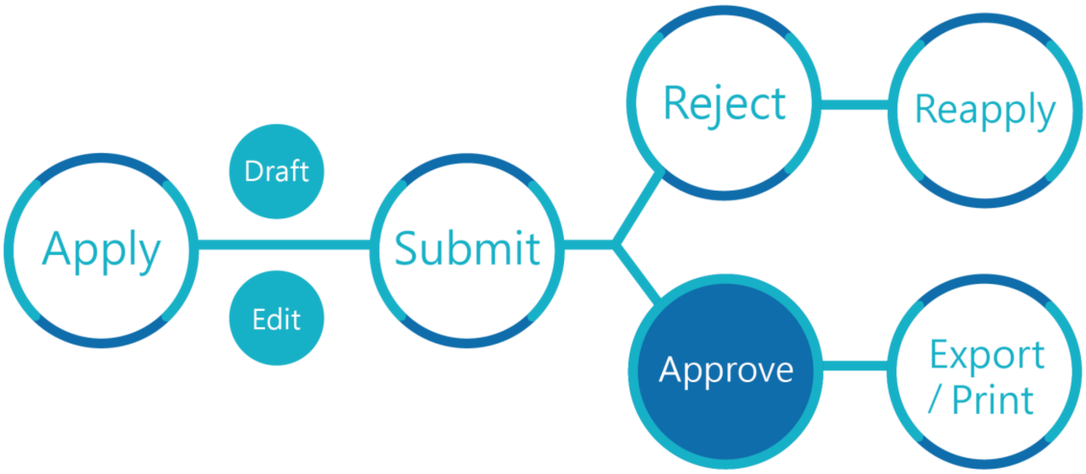
1. Ask the workplace admins to go to the Workplace page.
2. Click the Workplace Settings.
3. Click the Tool Box and the Activated tab is available for you to activate, deactivate and manage tools.
4. Make sure the Approvals is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar quickly locate the members for role changes.
7. Click the drop down menu and edit members' roles, repeat until all roles have been assigned correctly.

STEP 2． Start

The Approvals tool offers paperless real-time approval signing that is both eco-friendly and time efficient. Team members are able to apply, approve and check past approval records. You can download the approvals for print if needed. The Approval flow follows the organizational settings that were set in the HR tool, so if you are done with the HR settings according to the Human Resource Manual, you may begin with Approvals.

The Approvals tool streamlines the traditional process, once approved, the approvals are filed in the archive for storage as seen Image STEP 2-1 [2]. This enables simpler task management and your team can track the approval process every step of the way!

[2] Approvals can be exported for printing, the graph below illustrates the general process flow, please see STEP 2-h Approval Print Out for details.



▲ Image STEP 2-1. Approval Process Flow

a. Set Categories

Setting different approval categories allows your team to pick the appropriate category when submitting new proposals. As per STEP 1-b Set Up Tool Roles, creating and editing approval categories are limited to the tool admins.

Manage Categories

1. Ask the workplace admins to go to the Workplace page.
2. Have the tool admin click Approvals in the Do page.
3. Click the Manage Categories on the left of the menu.
4. Click the + button to fill out the category name and press Enter to create.
    - Edit: Click on desired categoy to edit, press the check mark to complete editing.
    - Delete: Press the trash can icon then hit Confirm to delete the category type.

b. Apply

Anyone with Member level authority is able to apply for approvals.

Apply

1. Click Workplace > Do > Approvals > Requests.
2. Click + Apply and fill out the form (* must be filled).
   - Request Type: Select a category created in STEP 2-a.
   - Subject: Approval subject.
   - Content: Approval details.
   - Photos & Files: Attach related files for references.
   - Save / Submit: Save this draft or submit for approval.
   - Approval Personnel: Default is set by the organizational structure in the HR tool, designated approver can be selcted by request.
   - Designated Approver: A list of preset approvers, if an approver is not in the list, please as the HR tool admins to add that person.
3. Click Save to finish.

c. Edit

An approval draft can be edited as you wish, but once submitted, you cannot edit it.

Edit

1. Click Workplace > Do > Approvals > Requests.
2. Click the edit icon of the draft or select the draft and click the edit button to start editing.
3. Fill out the form (* must be filled), select Save as draft or Submit.
4. Click Save to execute. The approver will receive the approval notification.

When a sent approval contains clerical errors, you could

- cancel / withdraw,
- or ask the approver to reject it.

d. Cancel / Withdraw

To cancel a submitted approval when it contains clerical errors, the said approval will no longer need to be signed off. In the event that it had already been approved, you will then need to withdraw it. This involves the withdrawal process that requires the approver to sign off on it and will leave a record.

Cancel / Withdraw

1. Click Workplace > Do > Approvals > Requests.
2. Select the approval.
3. Cancel: Available only to unapproved approvals (in submitted status). Click the Cancel button and remark the reason of this cancellation, then hit Confirm to complete the process.
4. Withdraw: Available only to approved approvals (in approved status). Click the Withdraw button and remark the reason of this withdrawal, then hit Confirm to complete the process.

e. Approve

When assigned as an approver, you will receive notifications of pending approvals. You have the responsibility to sign off on them.

Approve

1. Select the approval via the method below.
   - Notification Bell icon
   - Dashboard: Workplace > Dashboard > Workflow.
   - Approvals tool: Workplace > Do > Approvals > Approve.
2. Select the approval(s).
   - Single approve: Select desired approval for sign off.
   - Batch approve: Check the box icon to select all.
3. Click Approve / Reject / Escalate then input remark if need to complete (Escalate and Remark are not allowed when using batch approve).

If an approval requires attention, you can Escalate to the higher-ups. This option is not available in batch approve.

Click Escalate and the approver can change the request type, attach relevant photos/files then send the approval based on organizational structure or select a designated approver.

f. Progress Check / Records

Based on STEP 1-b Set Up Tool Roles the available options will be slightly different depending on your role. While the user interface remains the same, Managers will have the option to check past records as seen in the table below.

Approval can be signed off according to the Organizational Structure or a Designated Approver (See STEP 2-b Apply), once sent, the manager will receive a notification, you, on the other hand, can track the approval progress. The Dept. Overview and Processed options are available when you need to quickly reference past approvals. The Dept. Overview option is only available to the managers of corresponding departments, while Processed option offers all the approvals you processed.

▼ Table STEP 2-f. Approvals Authorities

Option	Difference	Member	Manager	Tool Admin	Tool Admin Manager
Requests	Self-applied	●	●	●	●
Processed	Self-handled	●	●	●	●
Dept. Overview	Dept. members'	x	●	x	●
Overview	Workplace members'	x	x	●	●

Progress Check / Records

1. Click Workplace > Do > Approvals.
2. Follow STEP 2-f.
3. Filters and search options are available for use.
4. Click the approval to see its details.

g. Communicate Details

There is a comment section you could use to relay additional information when sending an approval; this is the perfect two-way communication between the applicant and the approver.

Communicate Details

1. Select an approval.
   - Applicant: Refer to STEP 2-b Apply.
   - Approver: Refer to STEP 2-e Cancel / Wiithdraw .
   - Tool Admin: Refer to STEP 2-f Progress Check / Records .
2. Click on the approval to view its details.
3. Use the Comments section to communicate details.

h. Approval Print Out

Approvals can be exported for print by the applicants and the approvers if need be, however, it is recommended that you only keep approval records that have been signed off on (either approved or rejected). An approval draft cannot be exported.

Approval Print Out

1. Follow Table STEP 2-f to view the approval details.
2. It is recommended that you print out an approval when it has been signed, either approved or rejected.
3. Select an approval to view its details.
4. Click on Export Report (Available to the applicant and the approver).
5. A PDF format of the approval can now be saved and printed out.