

sage

People

# Customer Support Guide

## Configuring the HR Approval Process





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Package	Version	Date
HCM	16.01	11/10/2016
HCM	19.15	05/07/2017



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## Purpose

This guide explains how to configure the HR Approval Process. For detailed information please refer to the HCM Configuration guide which can be found in [Sage Business Cloud People Support](#).

## Rationale

When creating and submitting a HR Request a process needs to be defined to allow for authorization. This mini guide defines the steps.

## Locating HR Request Approval Processes

Setup - App Setup - Create - Workflow & Approvals - Approval Process - Manage Approval Processes For: select *HR Request*

### Approval Process Screen

Approval Processes Help for this Page ?

HR Request: Non Compensation Changes Help for this Page ?

[« Back to Approval Process List](#)

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**Process Definition Detail** Edit | Clone | Delete | Activate | View Diagram

Process Name	Non Compensation Changes	Active	<input type="checkbox"/>
Unique Name	Non_Compensation_Changes	Next Automated Approver Determined By	
Description			
Entry Criteria	(HR Request: Location NOT EQUAL TO null) AND (HR Request: Job Title NOT EQUAL TO null) AND (HR Request: Basis NOT EQUAL TO null) AND (HR Request: Hours Worked NOT EQUAL TO null)		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Employment Record Owner		
Created By	Steve Pendleton, 11/02/2015 10:56	Modified By	Steve Pendleton, 29/06/2015 11:12

Steps 1-6 Process Definition

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**Initial Submission Actions** Add Existing | Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Set submitted date</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Clear Rejected</a>

Set Initial Submission Actions

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**Approval Steps** New Approval Step

Action	Step Number	Name	Description	Criteria	Assign	Behavior
<a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a>	1	Step 1		CreatedById <= fHCM2__One_Down_Manager__r.Id, else Approve	<a href="#">Relate</a>	rejection
<a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a>	2	Step 2			<a href="#">Relate</a>	rejection

Set Approval Steps

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**Final Approval Actions** Add Existing | Add New

Action	Type	Description
<a href="#">Edit</a>	Record Lock	Unlock the record for editing
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Set approved date</a>

Set Final Approval Actions

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**Final Rejection Actions** Add Existing | Add New

Action	Type	Description
<a href="#">Edit</a>	Record Lock	Unlock the record for editing
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Set Rejected</a>

Set Final Rejection Actions

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**Recall Actions** Add Existing | Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

Set Recall Actions

[^ Back To Top](#) Always show me fewer ▲ / ▼ more records per related list

Step Settings	Notes
<p><b>Steps 1-6 Process Definition</b></p> <p><b>Step 1</b> Enter a name and description for the process</p>	<p>You can create more than one approval process for HR Requests.</p> <ul style="list-style-type: none"> <li>• E.g. <i>compensation changes</i> and <i>non-compensation changes</i>.</li> <li>• The entry criteria specified on each then determines the records that enter the process</li> </ul>
<p><b>Step 2</b> Specify entry criteria</p>	<p>Optionally enter criteria to determine what type of change enters the approval process E.g. for compensation changes:</p> <ul style="list-style-type: none"> <li>• HR Request: Salary Increase % greater than 10</li> </ul> <p>For non-compensation changes:</p> <ul style="list-style-type: none"> <li>• HR Request Location NOT EQUAL to null</li> </ul>
<p><b>Step 3</b> Specify Approver Field and Record Editability Properties:</p>	<ul style="list-style-type: none"> <li>• Use the Sage Business Cloud People hierarchy, or a named user, in the approval step to specify approvers and not the Salesforce Manager setting here.</li> <li>• Leave Admins only as those able to edit the record once it's in the process</li> </ul>
<p><b>Step 4</b> Select Notification Templates</p>	<ul style="list-style-type: none"> <li>• Create a custom template or use the standard Salesforce template for notifying approvers</li> </ul>
<p><b>Step 5</b> Select Fields to Display on Approval Page Layout</p>	<ul style="list-style-type: none"> <li>• Choose the fields that the approver sees when logging in and approving the request.</li> <li>• Include the relevant fields that will enable the approver to make a decision bearing in mind the kinds of changes the approval process has been designed for</li> </ul>
<p><b>Step 6</b> Specify Initial Submitters</p>	<ul style="list-style-type: none"> <li>• Leave to defaults, in Sage Business Cloud People it's the line managers that can submit change requests</li> <li>• Submission Settings: unticked only HR Managers can recall</li> </ul>
<p><b>Set Initial Submission Actions</b></p>	<p>Set what happens to a record on submission:</p> <ul style="list-style-type: none"> <li>• Lock Record from Being edited</li> <li>• Set Submitted Date</li> <li>• Clear Rejected Date</li> </ul>
<p><b>Set Approval Steps</b> Determines who the approval step is sent to. Optionally set criteria to determine what records enter the step based on who has submitted the change</p>	<p>E.g. If person submitting the change is not one down manager then enter this step. Otherwise skip step and go to next step:</p> <ul style="list-style-type: none"> <li>• CreatedById &lt;&gt; fHCM2__One_Down_Manager__r.Id, <b>else Next Step</b></li> </ul>

Step Settings	Notes
	<ul style="list-style-type: none"> <li>Select Approver &gt; Automatically Assign to Approvers &gt; Related user &gt; Set to 1 down manager</li> </ul> (note: you can't edit an approval step once the Approval Process is active)
<b>Set Final Approval Actions</b>	Set what happens to a record on approval: <ul style="list-style-type: none"> <li>Unlock Record for Editing</li> <li>Set Approved Date</li> </ul>
<b>Set Final Rejection Actions</b>	Set what happens to a rejected request: <ul style="list-style-type: none"> <li>Unlock Record for Editing</li> <li>Set Rejected Date</li> </ul>
<b>Set Recall Actions</b>	Set what happens to the record if recalled: <ul style="list-style-type: none"> <li>Unlock Record for Editing</li> </ul>

## Troubleshooting

- Remember to activate your Approval Process after setting it up and be sure to test it thoroughly in Sandbox before going live.
- Check that each approver defined in your step criteria is setup correctly in the system otherwise the submitted HR Request will not show the Approval History section. E.g. if you define a Department Approver in your step criteria, make sure a Department Approver has been set on each Policy and that the Approver has a Team Member Record, a User Account and associated email address to receive the approval.



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## Related Documentation

Creating a HR Request in HCM  
HR Requests, Approval Flow and Finalization