Approval Tab – Effective 11/5/12

The rules which documents approvers have access to have not changed. Approvers will still only be able to see and approve documents for the folders to which they have rights.

Details on the new approval interface:

List View vs. Folder View

There are two different view options for the new approvals interface:

The **Folder** view is similar to the presentation today. The document number view, or **List** view, is great for users working with a large number of folders. The column headers for each view are exactly the same. The main difference in the two views is the grouping by folder. The default view will be by folder. Approvers can change the default view to list by selecting List view.

- **Aging Information**: Approvers will now see aging information pertaining to each document directly on the approval screen. Aging information is the specific number of days the document has been sitting in the approval folder. For example, if a requisition has been sitting in a department approval step for 10 days the interface will say **10 Days in Folder** followed by the name of the specific folder.

- **Approval Actions**: There is a button available next to each document in the new approval interface. The default action for this button is **Assign**. This allows approvers to click the button and easily assign the document to themselves. Whenever the document is already assigned, the default action will be **Approve**.

- **Filters**: Approvers will now be able to use filters to assist in finding the documents they are looking for. The filter functionality will allow users to narrow down the approval documents displayed. Examples include the following:
  - Current Workflow Step
  - Assigned Approver
  - Custom Fields
  - Form Type
  - Prepared by
  - Prepared For
  - Product Flags
  - Status Flags
  - Supplier
  - Priority

- **Outbox**: The outbox is a tab available to approvers. This tab presents the approvers with a list of everything they have either approved or rejected. Previously, there were separate outboxes available for each document type. The new outbox screen is a searchable single outbox for all document types.

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