Approval Hub (HR & Ops Suite)

End-User & Approver Manual

Version 2.0.3

Our Solutions Your Success

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1. Introduction for End-Users & Approvers

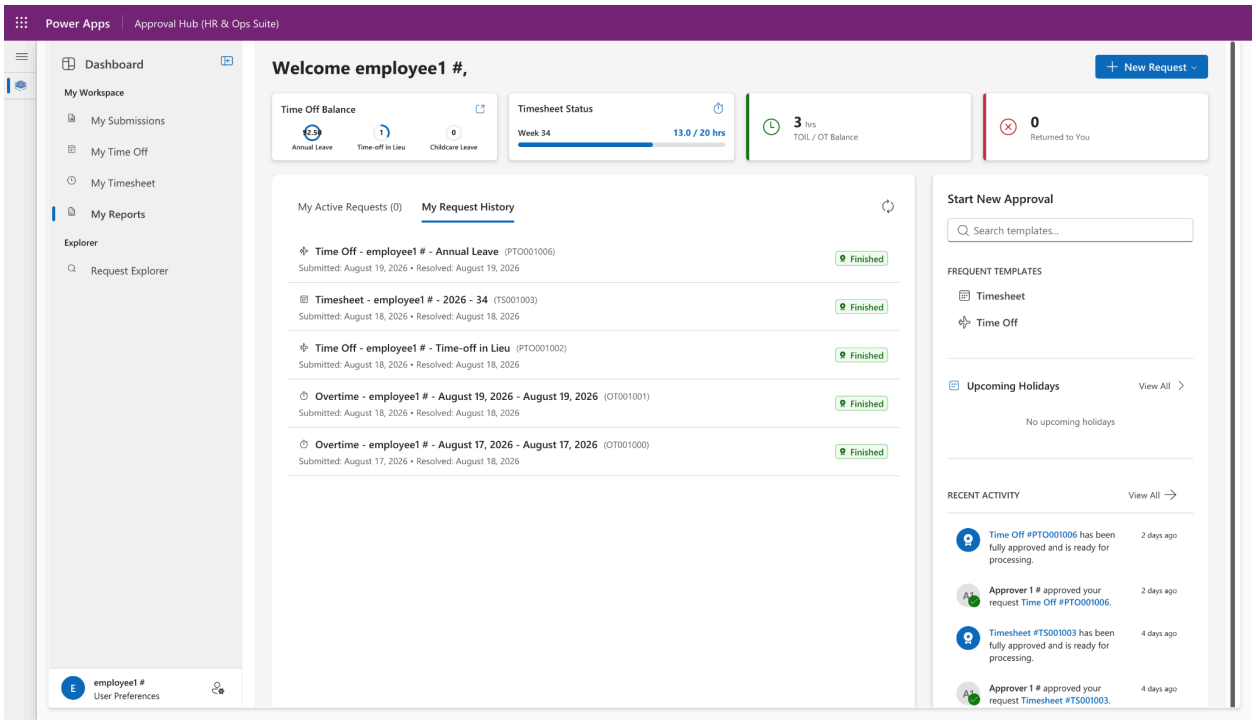
Welcome to the **Approval Hub** operational manual. This guide is tailored specifically for two primary user groups who interact with the platform daily:

- **Standard Employees (End-Users):** Authorized to submit operational requests, track live processing lines, manage personal timesheets, and log time-off records.
- **Managers & Approvers:** Authorized to review pending tasks, evaluate form structures or sub-grids, communicate on timelines, and execute binding approvals or rejections.

The application leverages a unified, responsive interface framework, ensuring consistency across standard computing layouts and mobile web operations.

2. End-User Workspace: Submitting & Tracking Requests

A. Dashboard Overview



When you log into the system, the Dashboard serves as your primary landing page for managing time and tracking work progress. The interface is organized into these key areas:

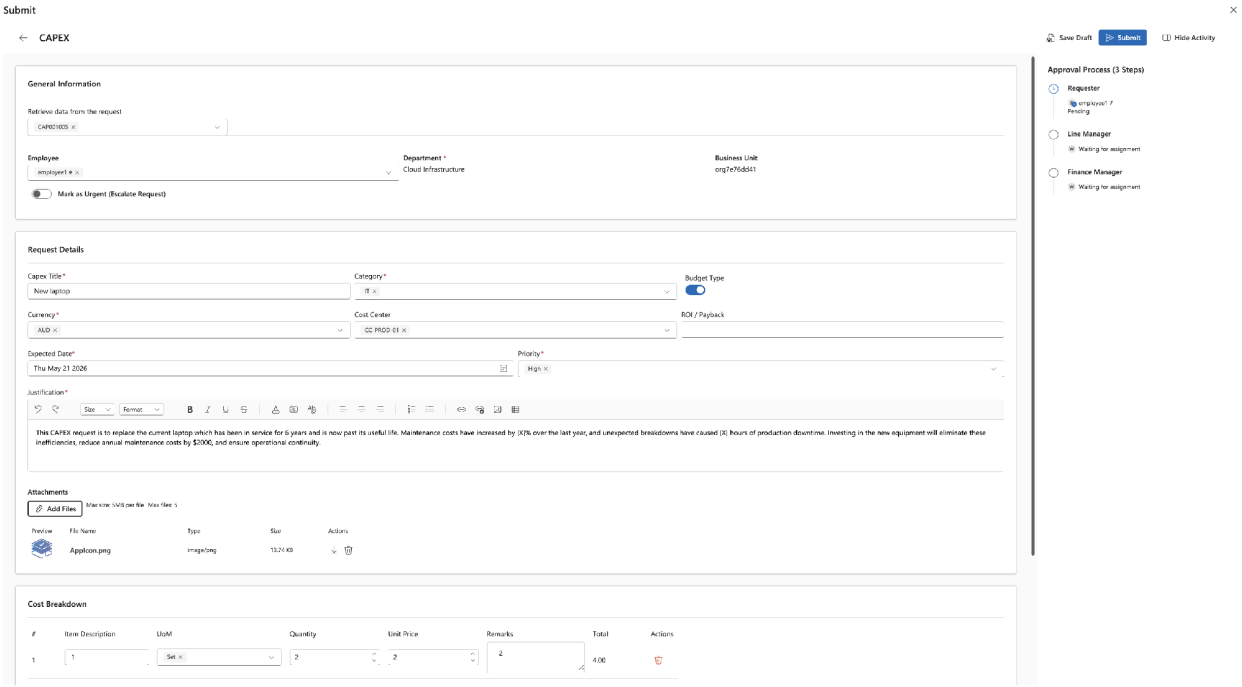
- **Key Metrics Summary:** At the top, you can view your real-time status:

- **Time Off Balance:** Displays your remaining quotas for Annual Leave, Time-off in Lieu, and Childcare Leave.
- **Timesheet Status:** Shows your current weekly progress (e.g., hours logged vs. total required).
- **TOIL / OT Balance:** Highlights your total accrued Time Off In Lieu or Overtime balance.
- **Returned to You:** Shows the count of requests rejected by managers that require your attention and revision.

- **Request Management:** The central section features two tabs:
  - **My Active Requests:** Lists tickets you have submitted that are currently in progress.
  - **My Request History:** Provides a comprehensive log of your completed and past requests.
- **Start New Approval:** Located in the right-hand column, this section allows you to initiate new requests quickly. You can search for specific forms or select from **Frequent Templates** (e.g., Timesheet, Time Off).
- **Upcoming Holidays:** Keeps you informed about any approaching holiday dates.
- **Recent Activity:** A newsfeed in the bottom right corner providing the latest updates on your requests, such as approval confirmations and status changes.

B. Creating and Submitting a New Request

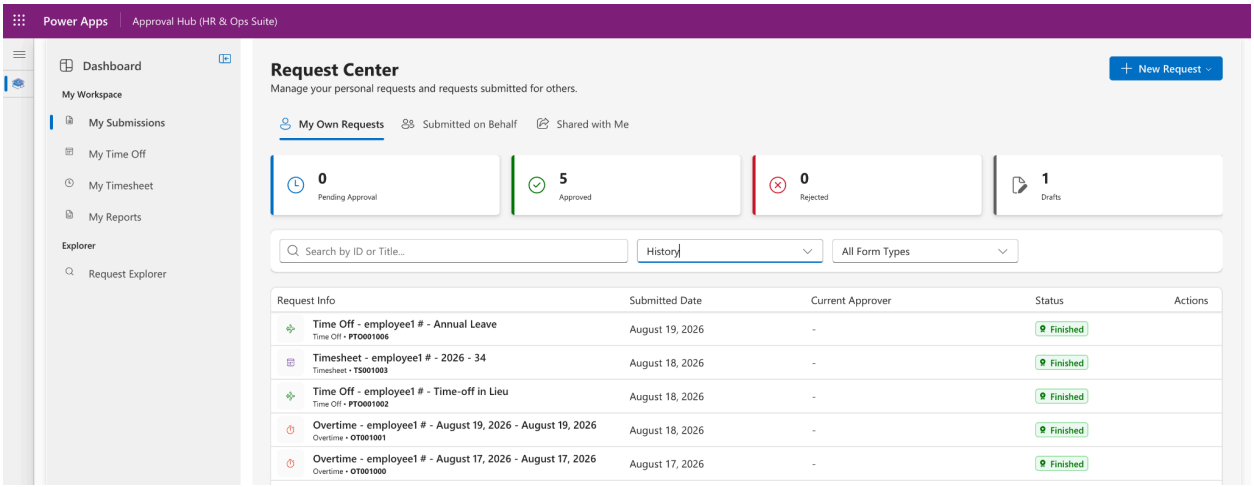
To create a request (e.g., CAPEX Budget, Expense Claim, Leave Request), follow this standard workflow:



1. **Step 1: General Information** The system automatically populates your name and Department in the employee fields. You can use the *Retrieve data from the request* dropdown to clone data from an old ticket to save time. Turn on the **Mark as Urgent (Escalate Request)** toggle if this is a high-priority item; the system will require you to enter a specific reason for the urgency.
2. **Step 2: Request Details** Fill in all required data fields. Pay close attention to fields marked with a red asterisk (*), as these are **mandatory**. You will not be able to submit the form if these are left blank. Provide a detailed explanation in the *Justification* rich-text box.
3. **Step 3: Attachments** Click the **Add Files** button to upload invoices, quotes, or supporting documents. Pay attention to the system limits displayed on the screen regarding maximum file size (e.g., 5MB) and maximum file count.
4. **Step 4: Data Tables (Cost Breakdown)** For forms requiring detailed itemization, click the blue **+ New Row** button to add entries. The system automatically calculates the *Total* column based on your entered *Quantity* and *Unit Price*.
5. **Step 5: Review Process & Submission** Before submitting, check the **Approval Process** panel on the right side of the screen. This outlines exactly how many steps your request will go through and who the current approver is. Click **Submit** to officially route the request, or click **Save Draft** if you need to finish it later.

C. Request Center (My Submissions)

To search and manage all your submitted tickets, click the **My Submissions** menu on the left navigation bar.



Main Management Tabs

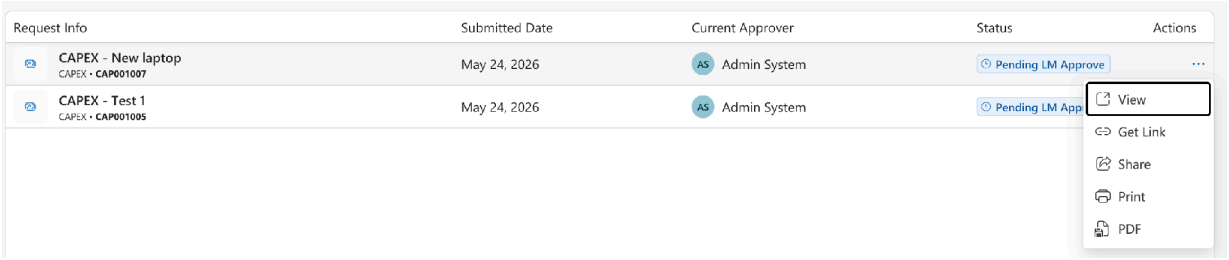
- **My Own Requests:** Contains all requests created directly by you.
- **Submitted on Behalf:** If you are an assistant or coordinator authorized to create tickets for others, those proxy submissions will appear here. The *On Behalf Of* column indicates who you are representing.
- **Shared with Me:** Contains requests where colleagues have granted you view-only access.

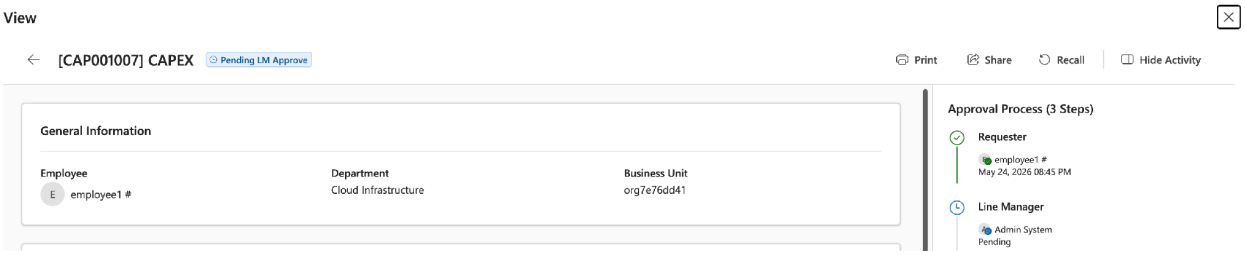
Tracking Status & History

- **Status Cards:** The top cards display quick counts of your tickets categorized by status: *Pending Approval*, *Approved*, *Rejected*, and *Drafts*.
- **Active vs. History Filter:** By default, the list only shows *Active* requests currently in routing. To find older, completed tickets, click the active filter dropdown and switch it to *History*.

D. Advanced Request Actions

When accessing your request list in *My Submissions*, you can perform quick actions by clicking the ellipsis icon (…) at the end of any row:





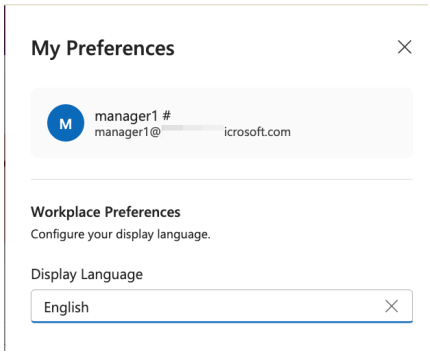
- **View:** Opens the full detailed data sheet of the ticket.
- **Get Link:** Copies the direct URL of the ticket for easy sharing via chat.
- **Share:** Grants view access of this specific ticket to another user or department.
- **Print / PDF:** Exports the form to a PDF file or prints a hard copy.

💡 **Important View-Level Features:** When you click **View** to open a specific request, you gain access to two powerful tools.

1. The **Recall** button (top right) allows you to pull a submitted request back to Draft status to fix mistakes, provided the manager has not yet processed it.
2. The **Activity & History** panel (bottom right) contains a **Type a comment...** box. Use this to chat directly with your approver inside the ticket, keeping all explanations and system notifications centralized.

E. Personalizing Your Settings (User Preferences)

To customize your system experience and adjust the interface to your regional needs, you can access your personal account settings menu at any time from the main dashboard.



A. Accessing the Preferences Panel

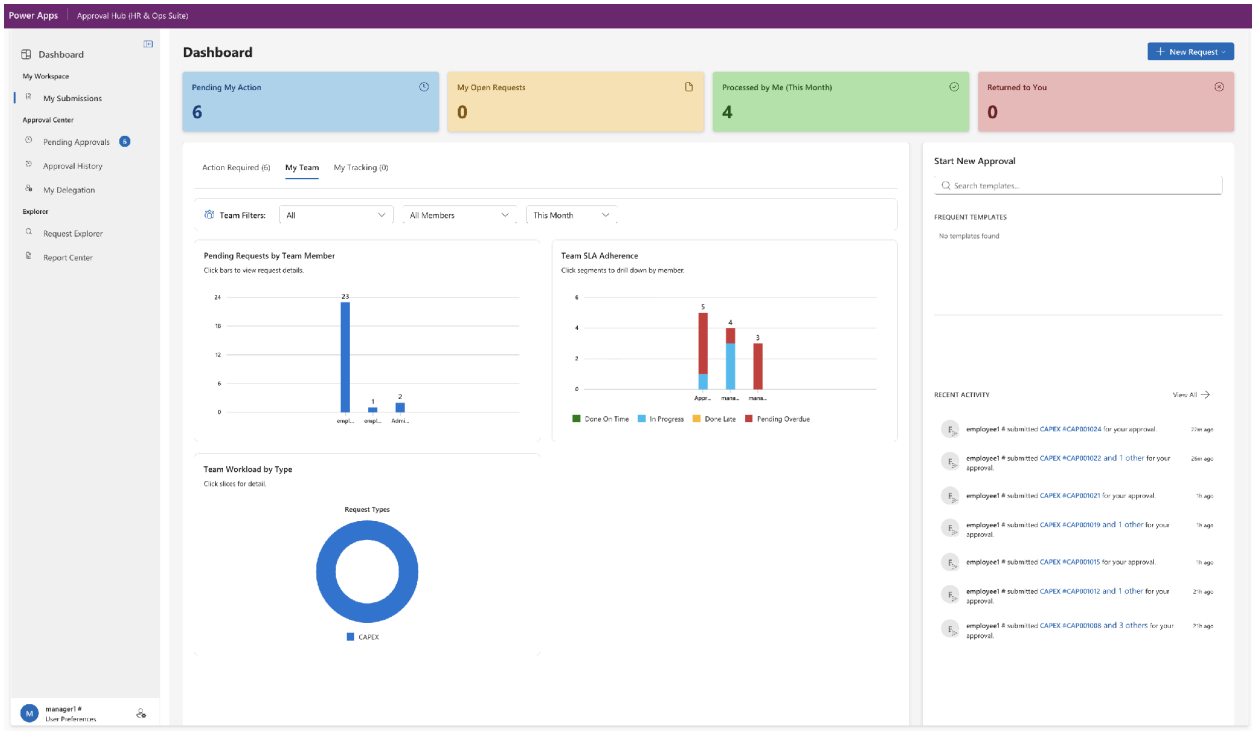
- Look at the very bottom left corner of your screen, located just below the main navigation menu.
- Click on your personal profile card (which displays your avatar, name, and a small gear icon labeled *User Preferences*).
- This action will slide open the **My Preferences** configuration panel on the right side of your screen.

B. Configuring Your Display Language Inside the preferences panel, you can manage your personal workplace settings:

- **Profile Overview:** At the top of the panel, you will see your verified identity details, including your display name and corporate email address.
- **Workplace Preferences (Display Language):** Use the dropdown menu to select your preferred interface language (e.g., *English*). Changing this setting ensures all navigation menus, action buttons, and system notifications are instantly localized to your language of choice.
- **Applying Changes:** Once you have selected your desired language, click the blue **Save Preferences** button at the bottom right corner of the panel to permanently apply the new language format across your entire Approval Hub interface.

3. Manager & Approver Workspace: Processing Tasks

This guide provides a comprehensive overview for Managers and Approvers to track workloads, communicate with team members, and process requests within the Approval Hub system effectively.



A. Monitoring via Color-Coded Cards

Throughout the system, requests are visually categorized using a color-coded card system to help you prioritize your workload at a glance. Clicking any card acts as a filter to display only the relevant requests. These tracking cards are located in two primary sections:

Dashboard Cards:

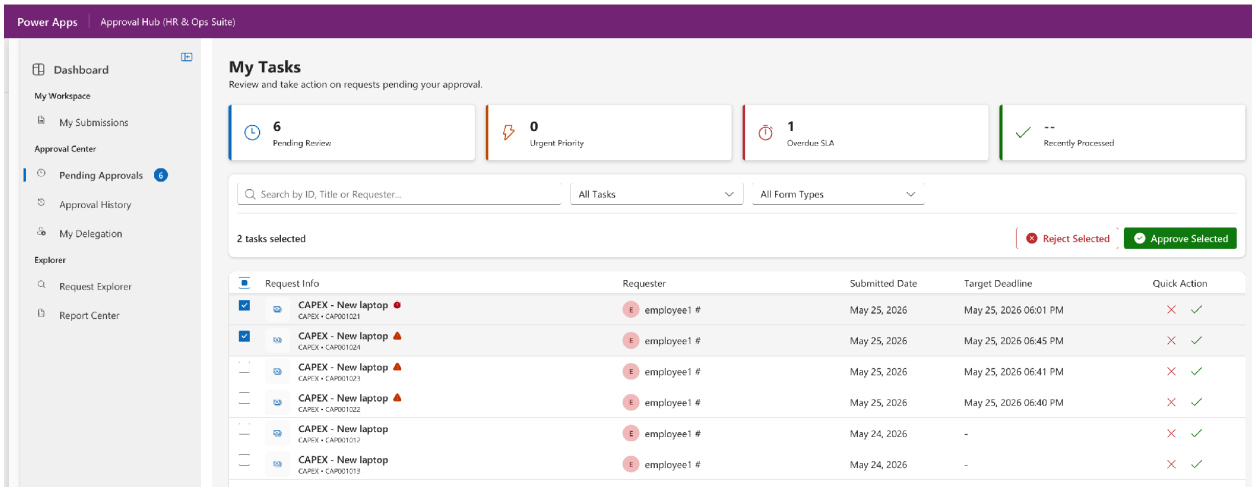
- **Pending My Action (Blue):** The number of requests currently waiting for your signature or review.
- **My Open Requests (Yellow):** The number of requests you created that are currently routed and waiting for approval.
- **Processed by Me (This Month) (Green):** The total number of tasks you have successfully completed within the current month.
- **Returned to You (Red):** Requests that were rejected by a manager and sent back to you for revision.

My Tasks Cards (Pending Approvals):

- **Pending Review (Blue):** The active queue of requests waiting for your direct approval or rejection.

- **Urgent Priority (Orange):** Escalated requests explicitly marked as highly urgent by the requester.
- **Overdue SLA (Red):** Critical requests that have breached their maximum processing time limit and require immediate attention.
- **Recently Processed (Green):** Requests you have successfully approved or rejected in your recent sessions.

B. Quick Actions & Bulk Processing

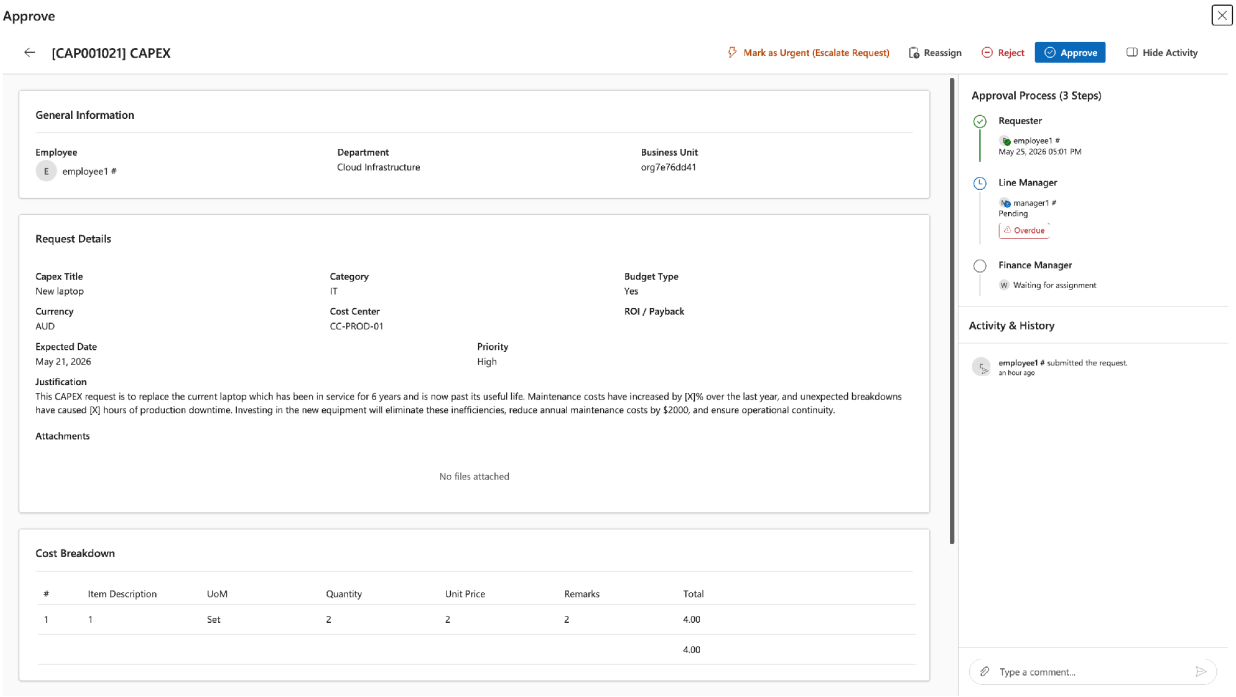


For standard requests that do not require deep-dive inspection, you can process them directly from the Dashboard or the Pending Approvals menu without opening every single form:

- **Inline Action:** On the far right of each request row, click the **Green Checkmark (✓)** to instantly approve or the **Red Cross (X)** to instantly reject a specific item.
- **Bulk Processing:** For routine tasks reviewed offline, check the boxes next to multiple request rows. Then, click the **Approve Selected** or **Reject Selected** button at the top of the grid to process the entire batch with a single click.

C. Detailed Review & Decision Making

For complex requests (e.g., high-value CAPEX budgets) that require thorough inspection, click anywhere on the request row to open the Detailed View.



Decision Tools In the top right action bar, you have four primary controls:

- **Approve:** Authorizes the request and moves it to the next workflow tier or finalizes it.
- **Reject:** Denies the request. *(Note: Before clicking Reject, scroll to the Process > Comment box at the bottom of the form to provide an official reason for the rejection).*
- **Reassign:** If the request is outside your scope, click **Reassign** to transfer the task to another qualified manager or team lead.
- **Mark as Urgent:** Escalates the ticket priority, ensuring the next approver in the chain treats it with high urgency.

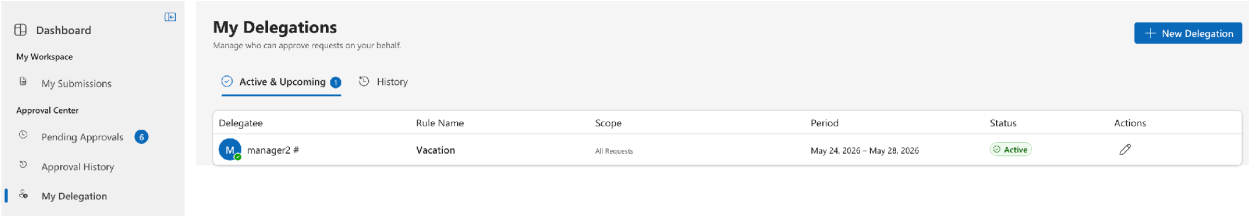
Internal Collaboration (Activity & History) Avoid fragmented email or chat threads by using the Activity & History panel on the right side of the form:

- Type your clarification questions or notes in the **Type a comment...** box and click send.
- The system automatically logs these comments and notifies the requester, keeping all project communication centralized within the request ticket itself.

D. Managing Your Out-of-Office Proxies (My Delegations)

The My Delegations module is a vital business continuity tool tailored for managers and approvers. It allows you to legally assign your signing authority to a designated proxy when you are away from the office due to annual leave, business travel, or emergency absences. Setting

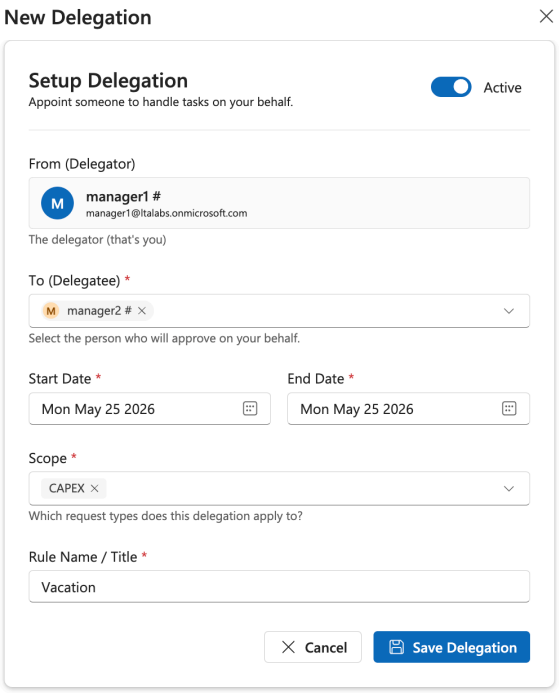
up a timely delegation ensures that your team's requests are not blocked or delayed in your queue while you are out, protecting overall operational velocity.



The My Delegations Dashboard To review or establish your proxy signing instructions, navigate to **Approval Center > My Delegation** on the left navigation menu. The primary hub provides several filtering and setup options:

- **Segmented Execution Tabs:** Toggle your workspace between *Active & Upcoming* to oversee currently active rules or scheduled future assignments, and *History* to review past, expired delegation configurations.
- **New Delegation Action:** Click the blue **+ New Delegation** button in the top right corner to open a blank property panel and configure a new proxy routing assignment.
- **The Delegation Ledger Grid:** The central tracking matrix indexes your instructions across five specific data columns:
    - **Delegatee:** The profile card and name of the proxy user you have appointed to act on your behalf (e.g., *manager2 #*).
    - **Rule Name:** The formal title given to the delegation context (e.g., *Vacation*).
    - **Scope:** The functional authority boundary granted to the proxy (e.g., *All Requests*).
    - **Period:** The explicit timeframe during which the delegation is active (e.g., *May 24, 2026 – May 28, 2026*).
    - **Status:** Renders a green *Active* badge or status indicator to show if the rule is currently handling active live-process redirection layers.
    - **Actions:** Displays an inline edit pencil icon allowing you to update parameters on the fly or adjust dates.

Configuring a New Delegation Profile Clicking the new delegation instrument launches the focused *New Delegation* modal pane. To guarantee seamless workflow automation, you must configure the following metrics properly:



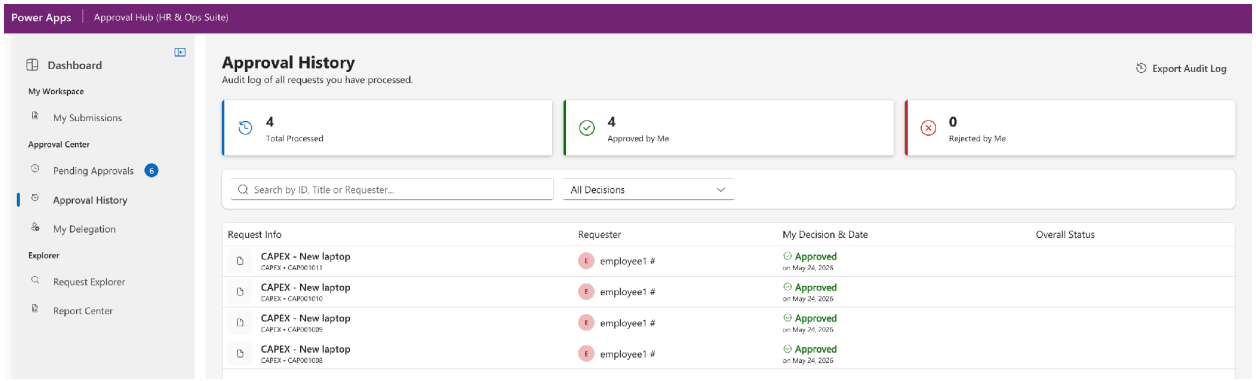
- **Active Toggle Switch:** Located at the top of the panel under *Setup Delegation*. Keep this switch flipped to Active to let the engine recognize the rule. If you wish to stage a future rule without initializing it immediately, you can temporarily toggle it off.
- **From (Delegator):** A read-only, hardcoded profile container confirming your identity as the primary task owner handing off signing privileges (e.g., *manager1 #*).
- **To (Delegatee):** A mandatory dropdown selection lookup field. Search for and select the precise employee or proxy manager who will officially approve tasks on your behalf (e.g., *employee2 #*).
- **Start Date & End Date:** Mandatory date pickers establishing the exact calendar duration of your absence.
    - *System Automation Logic:* The system's routing engine automatically redirects any task landing in your queue to the delegatee starting at 12:00 AM on your designated Start Date and seamlessly revokes their proxy access at 11:59 PM on your designated End Date.
- **Scope:** A mandatory multi-select dropdown bounding the functional reach of your proxy.
    - *All Requests Selection:* Grants blanket proxy authority, permitting your delegatee to approve or reject any form category that routes through you.

- *Targeted Selection:* Allows you to check specific forms only, ensuring that highly confidential or sensitive process lines remain locked from proxy access.

- **Rule Name / Title:** Enter a mandatory, descriptive text string indicating the reason or business context for the delegation rule (e.g., *Vacation*).

💡 **Submission Rule:** Once all proxy parameters, targeted scopes, and date boundaries are finalized, click the blue **Save Delegation** button at the bottom right corner of the pane to permanently publish your delegation instruction to the workflow engine. If you need to discard your inputs, click **Cancel**.

E. Tracking Approval History



To audit your past decisions or generate performance reports, navigate to **Approval Center > Approval History** on the left navigation menu.

- **Audit Log:** This page maintains a permanent, read-only record of every request you have processed.

- **Decision Tracking:** Use the filter tabs (*Total Processed*, *Approved by Me*, *Rejected by Me*) to quickly find specific records. The grid clearly shows your decision, the date of action, and the overall status of the ticket.

F. The Auditing Vault & Team Analytics

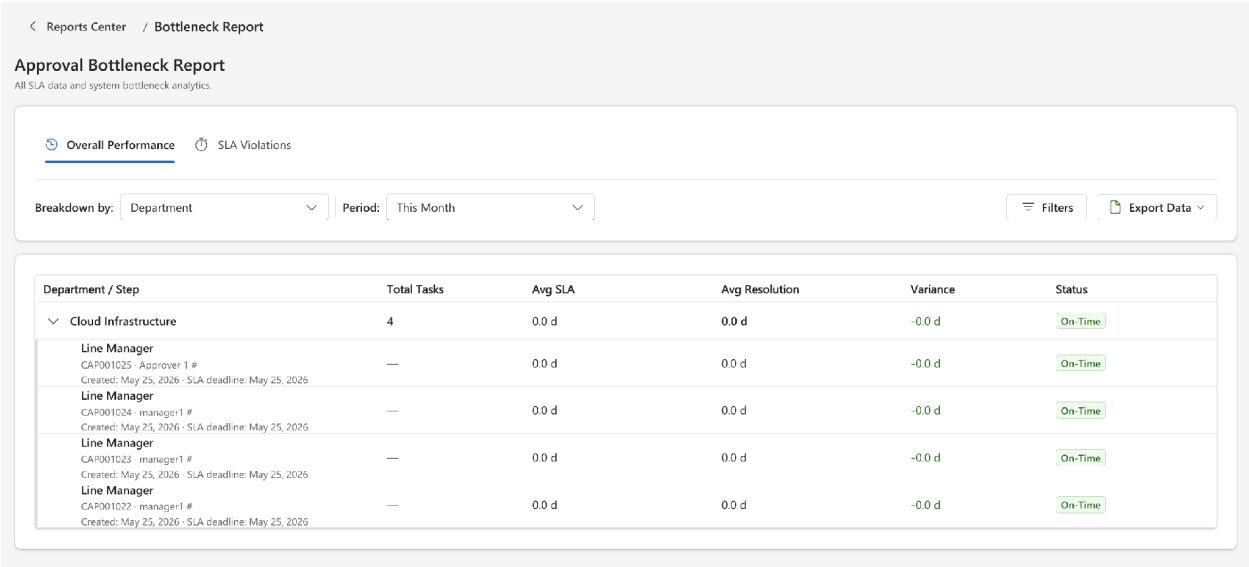
The **Reports Center** (Auditing Vault) provides managers with powerful analytical tools to oversee team productivity, identify processing bottlenecks, and audit historical workflow data.

🔒 **Important Security & Visibility Note:** To maintain strict data privacy and structural security, standard Managers are restricted by Role-Based Access Control (RBAC). You can only view analytics, reports, and request data belonging exclusively to your assigned Department(s). You cannot view or audit transactions from other operational business units unless explicitly shared with you.

The "My Team" Dashboard Located directly on your main Dashboard under the **My Team** tab, this workspace offers a real-time visual overview of your department's current workload:

- **Team Filters:** Use the dropdown menus to filter data by specific team members, all members, or specific time periods (e.g., *This Month*).
- **Interactive Charts:** The dashboard renders several key performance indicators:
    - **Pending Requests by Team Member:** A bar chart showing exactly how many tickets each employee currently has open.
    - **Team SLA Adherence:** A stacked bar chart visualizing processing performance (e.g., *Done On Time, In Progress, Done Late, Pending Overdue*).
    - **Team Workload by Type:** A visual donut chart breaking down the volume of specific request types (e.g., *CAPEX*).
- **Data Drill-Down:** These charts are interactive. Clicking on a specific bar (e.g., a red "Pending Overdue" segment) instantly opens a detailed popup grid (like *SLA Details* or *Requests by Employee*), allowing you to see the exact ticket IDs, due dates, and statuses making up that metric.

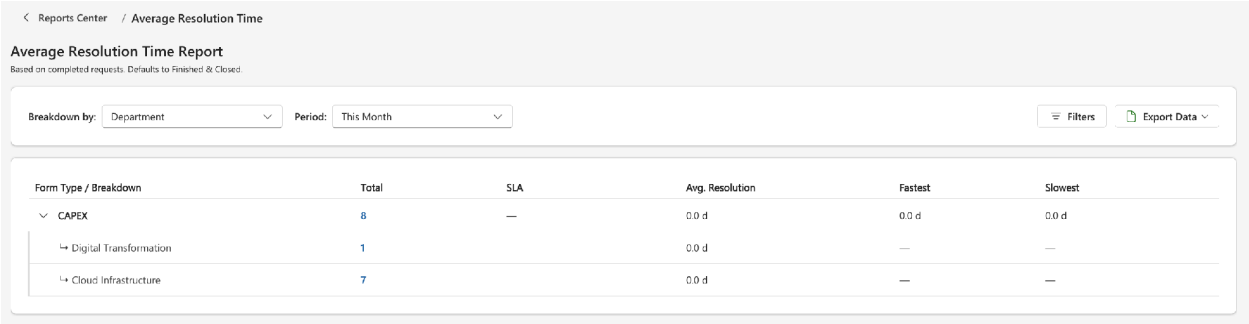
The Bottleneck Report To proactively clear workflow traffic jams, navigate to **Explorer > Report Center** and select the **Bottleneck Report**. This tool is divided into two critical execution tabs:



- **Overall Performance:** Analyzes every step of the workflow for your department. It compares the *Avg SLA* against the actual *Avg Resolution* time, displaying the Variance (e.g., +0.0 d) and flagging the overall Status (e.g., *Warning, On-Time, No SLA*).
- **SLA Violations:** This tab strictly isolates overdue tasks that have breached their deadlines.

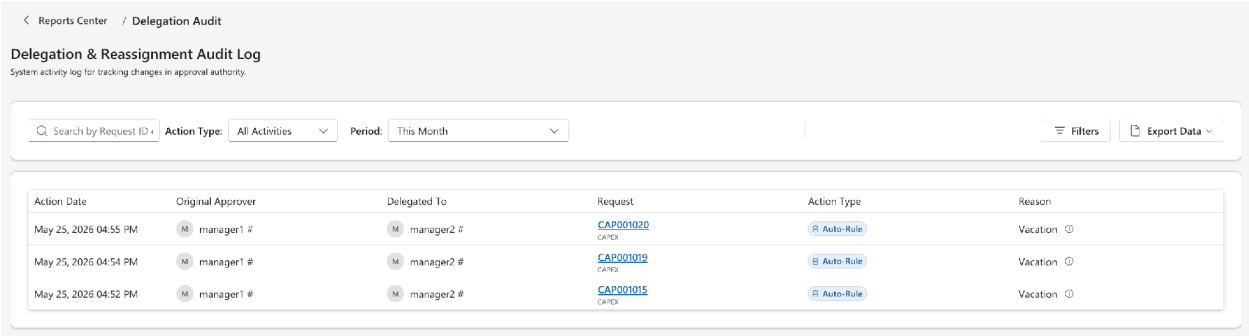
- **Actionable Reminders:** In the far-right column of this grid, managers can click the ✉ **Reminder** button to instantly send an automated system nudge to the specific approver who is holding up the request.

Average Resolution Time Report This report evaluates the historical speed and efficiency of your completed departmental requests.



- **High-Level Breakdown:** View the total volume of requests against the *Avg. Resolution* time, highlighting the Fastest and Slowest processing times across different form categories.
- **Step-by-Step Drill Down:** Clicking into a specific request type expands a *Detailed Requests* view. From here, you can audit the exact lifecycle of a form, seeing the exact timestamps of when a task was assigned to a specific tier (e.g., *Line Manager*) and exactly how many days it took them to resolve it.

Delegation & Reassignment Audit Log To maintain strict compliance and transparency regarding who signed what, the **Delegation Audit** provides a permanent ledger of proxy actions.



- Track every instance where approval authority was transferred within your department.
- The grid displays the Original Approver, the Delegated To proxy user, the specific Action Type (e.g., *Auto-Rule* triggered by a scheduled absence), and the Reason provided (e.g., *Vacation*).

💡 **Quick Tip - Exporting Data:** Every analytical report and drill-down grid within the Auditing Vault features an **Export Data** button in the top right corner. You can use this tool to quickly download the filtered matrices for offline departmental reporting or compliance reviews.