Job Approvals Setup

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Flags, fields and setup tables in SedonaSetup allow the use of the Job Approval functionality. All setups must be completed prior to using this feature.

Job Management Setup Processing

A flag setting located on the Setup Processing form for Job Management enables the use of Job Approvals. This flag labeled Approval Processing, must be selected and saved to activate the Job Approval process.

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Job Approval Groups

A setup table is available in SedonaSetup within the JM (Job Management) group of tables labeled Job Approval Groups. Once you have defined your job approval process, create one record for each need job approval group.

Note: You may setup some of your job types to use just one or multiple job approval groups. The list of job type approval groups do not have to be the same for each job type. For example one job type may only require the approval of the operations manager while another job type may require the approval of a Sales Manager, Accounting Manager and the Operations Manager.
For each Job Approval Group, you will enter a Description and a default approval Level. This approval level may be overridden when setting up your list of job approval groups on the job type.

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Employee

The field labeled Job Approval Group located on the Employee setup form is used to link an Employee to a Job Approval Group. An employee may be assigned to only one Job Approval Group. Only the Users linked to Employee records that have a Job Approval Group link will be able to sign-off on the Job Approval Group assigned to them.

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Job Type

A tab labeled Approvals, is available on the Job Type setup once Job Approvals have been activated in Job Management Setup Processing.

On this form you will create a list of all the required job approval groups that must sign-off on the job. After selecting a Job Approval Group from the drop-down list, the approval level will default to the value entered in the Job Approval Group setup table. You may override the approval level. There are two selections boxes on this form; Allow Job Processing and Allow Commissions. Select the boxes that apply for this Job Approval Group. If the options Allow Job Processing and Allow Commissions are not selected, the user will just be signing-off on the job but not allowing the job to be processed.

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User Group Security

Two options have been added to the Application Access list for User Groups.

The first option is Job Approvals; this option must be selected if you want the user to be able to see the Job Approvals menu option within the Job Management module on the main application tree. If a user is not granted this new permission and the Employee record is associated with a Job Approval Group, they will be able to sign-off on the job approval within the job record but will not have access to the Job Approval Listing.

The second option is Job Remove Approval. If the user group is granted this permission, they will be allowed to remove a job approval sign-off that is not flagged to Allow Job Processing or Allow Commissions as long as the job has not yet been signed off for processing by another user.

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