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Approval Workflow Template

What is Approval Workflow Template?

An Approval Workflow Template is a pre-designed template in SharePoint that defines a workflow process for approving documents, requests, or tasks. It provides a structured and standardized approach to managing approvals within an organization.

Here are some key features of an Approval Workflow Template:

1. **Approval Process**: The template outlines the steps involved in the approval process, including who needs to approve, what they need to review, and when.
2. **Document Types**: The template specifies the types of documents or requests that will be submitted for approval, such as purchase orders, expense reports, or project proposals.
3. **Approval Levels**: The template defines the number of approvals required at each level, ensuring that multiple individuals or groups are involved in the review and approval process.
4. **Notification Settings**: The template specifies how notifications will be sent to approvers, including email reminders and due dates for responses.
5. **Status Updates**: The template tracks the status of each item submitted for approval, allowing administrators to monitor progress and identify any bottlenecks or delays.

By using an Approval Workflow Template in SharePoint, organizations can:

1. Streamline the approval process: Automate repetitive tasks and reduce manual intervention, saving time and improving efficiency.
2. Enhance accountability: Ensure that all approvals are tracked and recorded, providing a clear audit trail for compliance and regulatory purposes.
3. Improve communication: Send notifications to approvers and requesters in a timely manner, reducing confusion and miscommunication.
4. Increase visibility: Allow administrators to monitor the approval process and identify areas for improvement.

Some common use cases for Approval Workflow Templates include:

1. **Purchase Order Approvals**: Automate the purchase order approval process, ensuring that all requests are reviewed and approved by multiple stakeholders before being executed.
2. **Expense Report Approvals**: Streamline the expense report approval process, allowing employees to submit claims for reimbursement in a timely manner while ensuring that all expenses are properly vetted and approved.
3. **Project Proposal Approvals**: Manage project proposals from submission to final approval, ensuring that all stakeholders have an opportunity to review and provide input before the project is greenlit.

By leveraging Approval Workflow Templates in SharePoint, organizations can create a more efficient, transparent, and accountable approval process that benefits both employees and management alike.

workflow, templates, approval, automation, accountability, visibility, communication, purchase, orders, expense, reports, project, proposals

Approval Workflow Template

Introduction

Purpose: Explain the purpose of the approval workflow. **Scope:** Define the scope of the processes covered by this workflow.

Workflow Overview

Provide a high-level description of the approval workflow process.

Roles and Responsibilities

Initiator

- **Responsibilities:**
  - Describe the responsibilities of the person initiating the request.

Approver(s)

- **Responsibilities:**
  - List the responsibilities of the individuals who will approve the request.

Administrator

- **Responsibilities:**
  - Outline the responsibilities of the administrator overseeing the workflow.

Approval Process

Step 1: Submission

- **Action:**
  - Detail the steps for submitting a request for approval.

Step 2: Review

- **Action:**
  - Explain the process for reviewing the submitted request.

Step 3: Approval/Rejection

- **Action:**
  - Describe the criteria and process for approving or rejecting the request.

Step 4: Notification

- **Action:**
  - Specify how the initiator will be notified of the approval/rejection.

Step 5: Implementation

- **Action:**
  - If approved, detail the steps for implementing the decision.

Step 6: Documentation

- **Action:**
  - Describe how the approval and its outcomes will be documented.

Approval Levels

Define the different levels of approval required for various types of requests.

Exceptions and Escalations

Explain the process for handling exceptions and escalations in the approval workflow.

Tools and Resources

List any tools or resources used to manage the approval workflow.

Revision History

Document the history of revisions to the approval workflow.

Appendices

Include any additional information, forms, or documents relevant to the approval workflow.

Export as PDF

Related:

- Project management

External links:

- 100+ Free Approval Templates | Jotform —*jotform.com*
  - Create automated approval flows. Drag and drop to customize. No coding. Respond

in a single click on any device. Send autoresponder emails, notifications, and more.

- Download Free Workflow Templates | Smartsheet —*smartsheet.com*
  - Download free, customizable workflow templates in Microsoft Excel, Word, PowerPoint, and Visio formats.
- How to Automate Approvals: 20+ Free Approval Process Templates —*process.st*
  - A poor approval process results in lower quality and lost time. Learn how to streamline your business processes with approvals by reading this article!

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