



Approval workflow

ADITO Software GmbH

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Screenshots

The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.





Agenda

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Approval workflow

Overview

Use cases for the approval workflow can be, for example

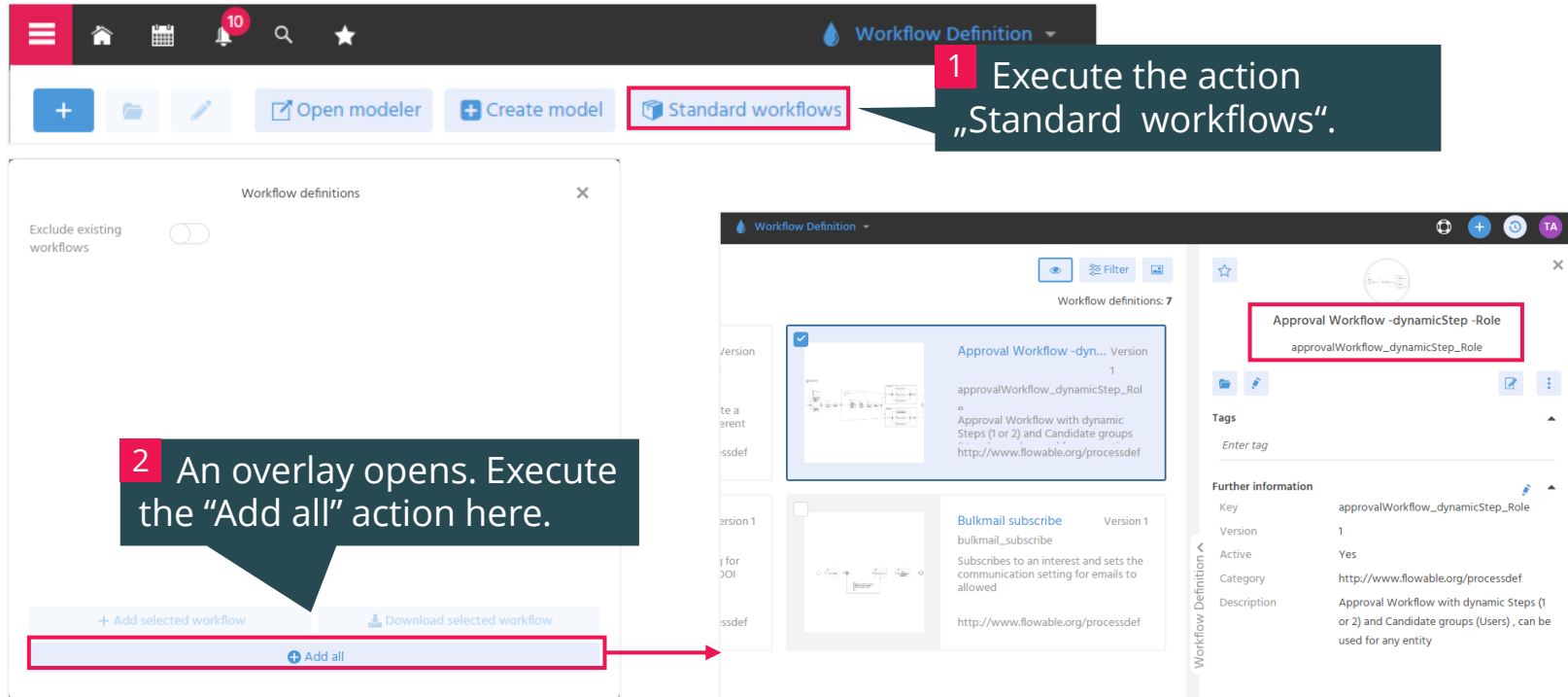
- An offer exceeds a budget limit and must be approved by a higher-level instance.
- The review of offers should be based on the dual control principle.
- When processing a critical service ticket, a higher-level instance must check before a response is sent to the requester.

Prerequisite for being able to use the workflow :

- The “Approval workflow” must be added in the “Workflow definition” context.
- The approvers in the 1st and 2nd instance must be assigned the corresponding role.

Context „Workflowdefinition“

Add workflow



The screenshot shows the ADITO Workflow Definition interface. At the top, a navigation bar includes a menu icon, home, calendar, notifications (10), search, and a star. Below this is a toolbar with buttons for '+', folder, edit, 'Open modeler', 'Create model', and 'Standard workflows'. A callout box labeled '1' points to the 'Standard workflows' button with the text: "Execute the action „Standard workflows“."

Below the toolbar, a 'Workflow definitions' overlay is open. It has a toggle for 'Exclude existing workflows' and a list of workflow definitions. A callout box labeled '2' points to the 'Add all' button at the bottom of the overlay with the text: "An overlay opens. Execute the „Add all“ action here." A red arrow points from the 'Add all' button to the main interface.

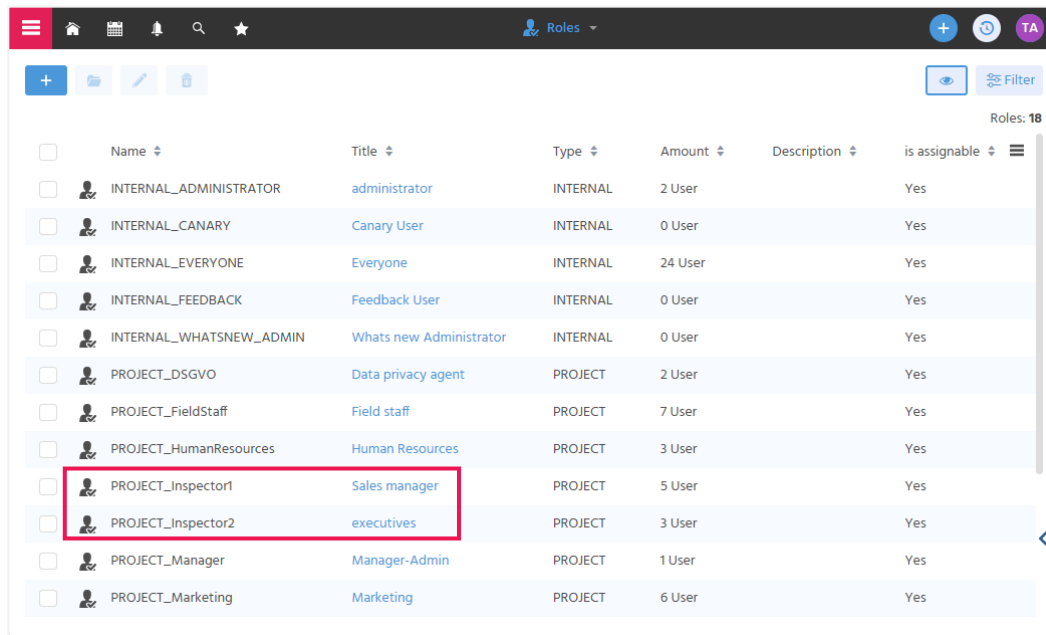
The main interface shows a list of workflow definitions. The first one is 'Approval Workflow -dyn... Version 1' with a checkbox selected. The second is 'Bulkmail subscribe Version 1' with a checkbox unselected. A callout box labeled '3' points to the 'Approval Workflow -dyn... Version 1' entry with the text: "Approval Workflow -dynamicStep-Role approvalWorkflow_dynamicStep_Role".

On the right side, a 'Further information' panel is visible for the selected workflow. It contains the following details:

Key	Value
Version	1
Active	Yes
Category	http://www.flowable.org/processdef
Description	Approval Workflow with dynamic Steps (1 or 2) and Candidate groups (Users) , can be used for any entity

Approval roles

Specialist administration: Role assignment for approval roles



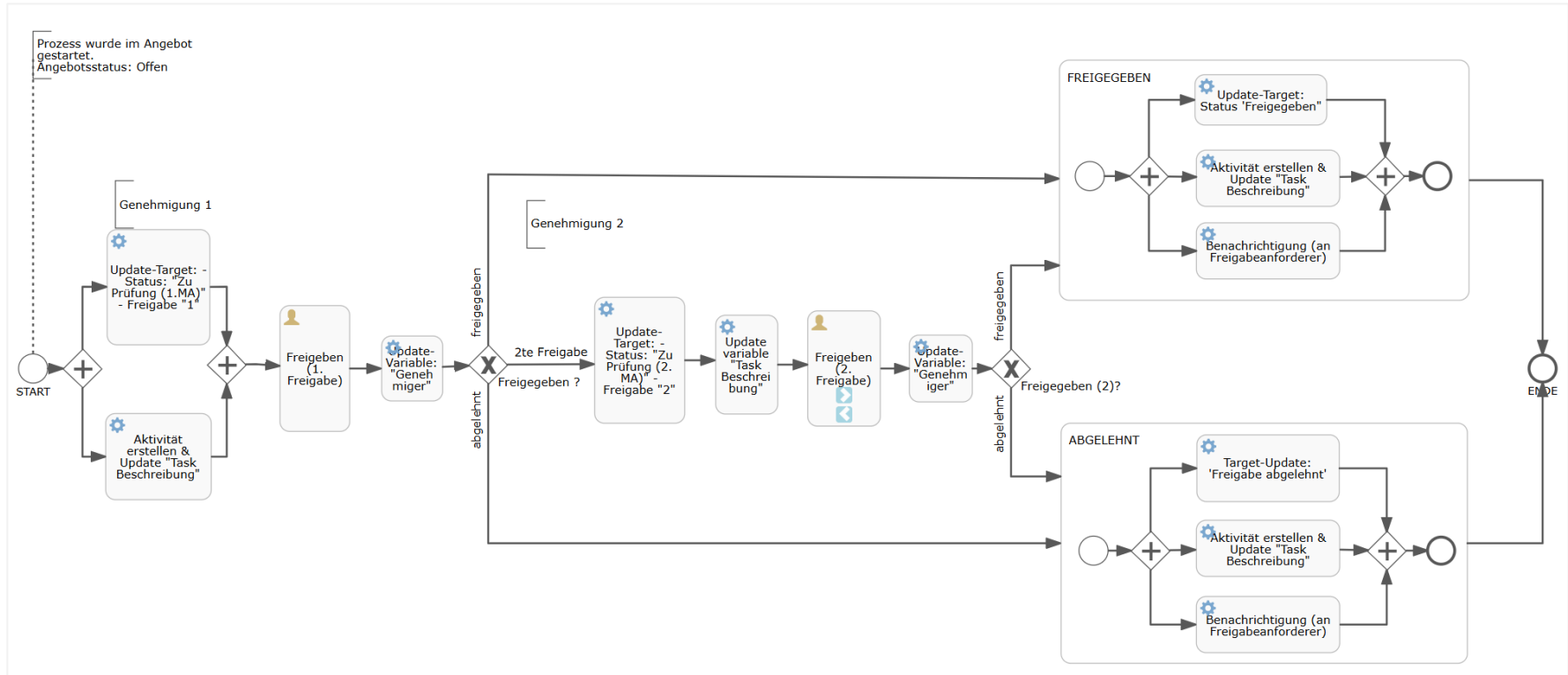
☐	Name	Title	Type	Amount	Description	is assignable
☐	INTERNAL_ADMINISTRATOR	administrator	INTERNAL	2 User		Yes
☐	INTERNAL_CANARY	Canary User	INTERNAL	0 User		Yes
☐	INTERNAL_EVERYONE	Everyone	INTERNAL	24 User		Yes
☐	INTERNAL_FEEDBACK	Feedback User	INTERNAL	0 User		Yes
☐	INTERNAL_WHATSNEW_ADMIN	Whats new Administrator	INTERNAL	0 User		Yes
☐	PROJECT_DSGVO	Data privacy agent	PROJECT	2 User		Yes
☐	PROJECT_FieldStaff	Field staff	PROJECT	7 User		Yes
☐	PROJECT_HumanResources	Human Resources	PROJECT	3 User		Yes
☐	PROJECT_Inspector1	Sales manager	PROJECT	5 User		Yes
☐	PROJECT_Inspector2	executives	PROJECT	3 User		Yes
☐	PROJECT_Manager	Manager-Admin	PROJECT	1 User		Yes
☐	PROJECT_Marketing	Marketing	PROJECT	6 User		Yes

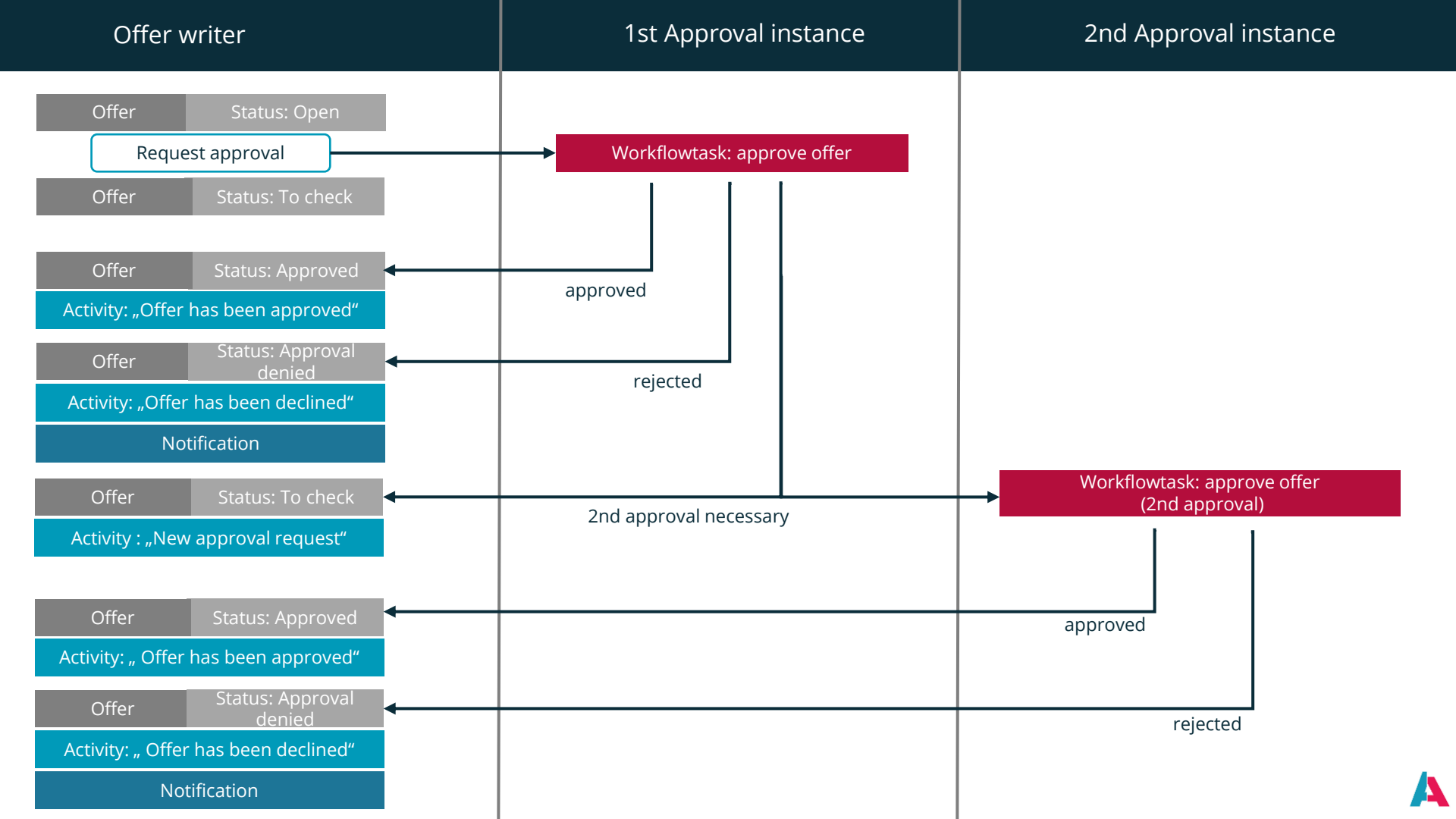
To define someone as an approver in the approval process, the roles “Sales manager” and “executives” are used.

The role “Sales manager” is assigned to employees who are to issue approvals in the 1st instance.

The role “executives” is assigned to employees who are to issue approvals in the 2nd instance.

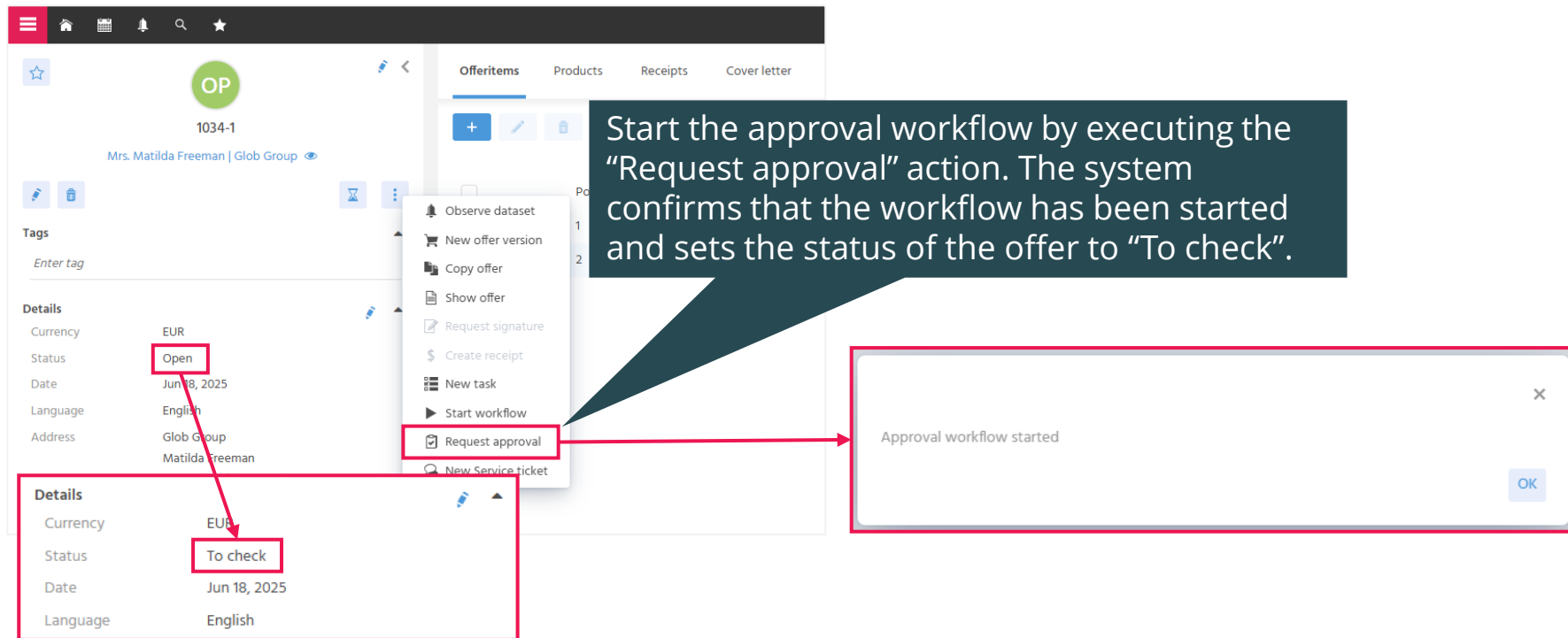
Approval workflow in the modeler





Approval workflow

Request approval



Start the approval workflow by executing the "Request approval" action. The system confirms that the workflow has been started and sets the status of the offer to "To check".

The screenshot shows the ADITO interface with the following details:

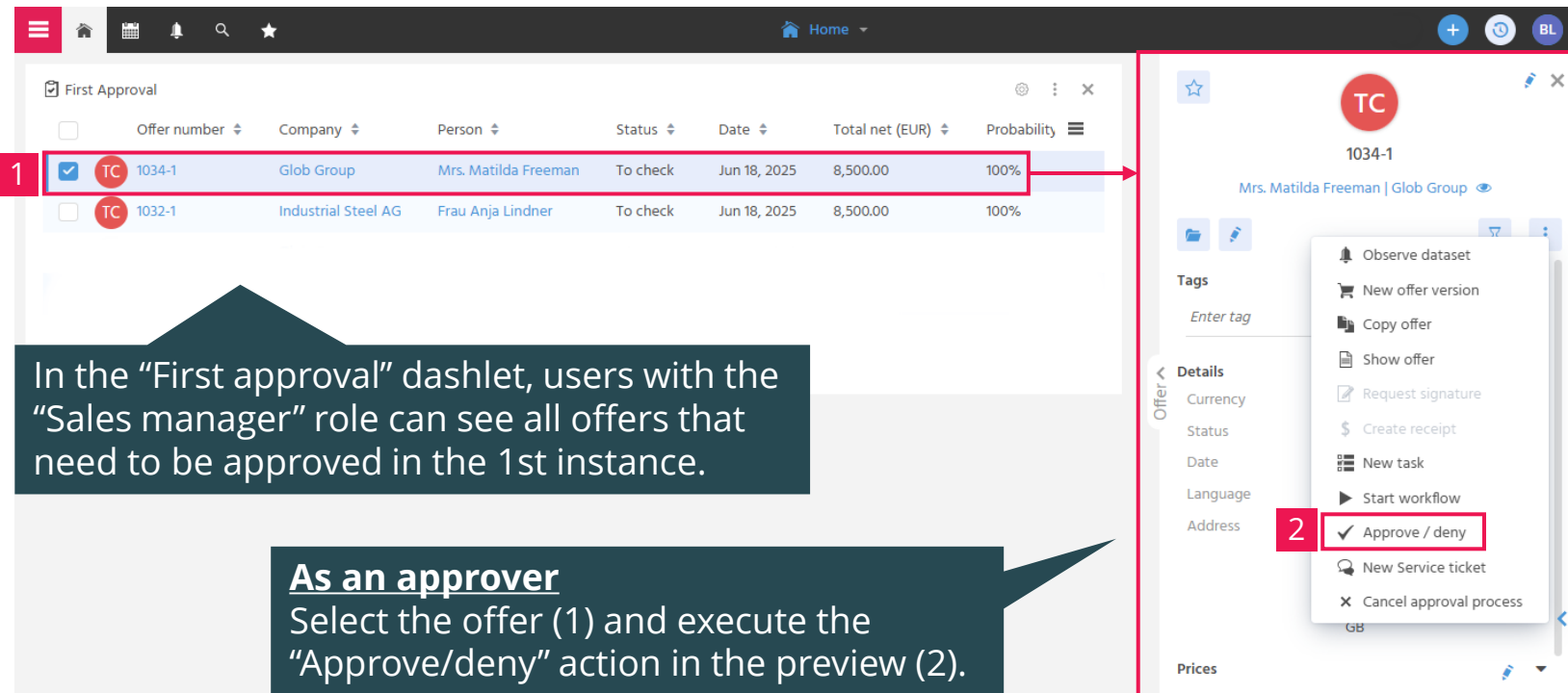
- Offer Details:**
 - Offer ID: 1034-1
 - Customer: Mrs. Matilda Freeman | Glob Group
 - Currency: EUR
 - Status: Open
 - Date: Jun 18, 2025
 - Language: English
 - Address: Glob Group, Matilda Freeman
- Actions Menu:**
 - Observe dataset
 - New offer version
 - Copy offer
 - Show offer
 - Request signature
 - Create receipt
 - New task
 - Start workflow
 - Request approval** (highlighted)
 - New Service ticket
- Confirmation Dialog:**

Approval workflow started

OK
- Updated Offer Details:**
 - Currency: EUR
 - Status: To check
 - Date: Jun 18, 2025
 - Language: English

Approval workflow

Approver of the 1st approving instance receives the request



The screenshot displays the 'First Approval' dashlet in the ADITO interface. It features a table of offers and a detailed view of the selected offer (1034-1).

Table 1: Offers

	Offer number	Company	Person	Status	Date	Total net (EUR)	Probability
1	TC 1034-1	Glob Group	Mrs. Matilda Freeman	To check	Jun 18, 2025	8,500.00	100%
	TC 1032-1	Industrial Steel AG	Frau Anja Lindner	To check	Jun 18, 2025	8,500.00	100%

Offer Details (1034-1):

- TC 1034-1
- Mrs. Matilda Freeman | Glob Group
- Tags: Enter tag
- Details: Currency, Status, Date, Language, Address
- Prices: GB

Actions:

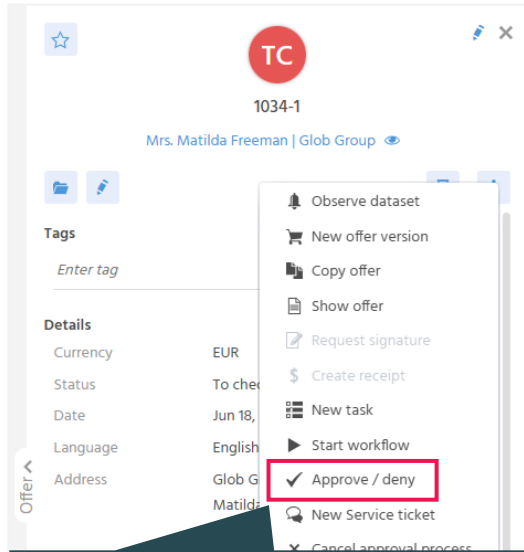
- Observe dataset
- New offer version
- Copy offer
- Show offer
- Request signature
- Create receipt
- New task
- Start workflow
- 2 Approve / deny
- New Service ticket
- Cancel approval process

In the "First approval" dashlet, users with the "Sales manager" role can see all offers that need to be approved in the 1st instance.

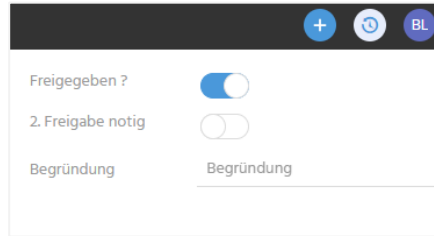
As an approver
Select the offer (1) and execute the "Approve/deny" action in the preview (2).

Approval workflow

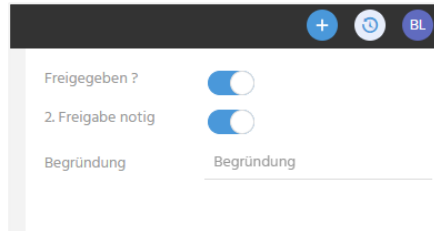
Approver of the 1st approving instance processes the request



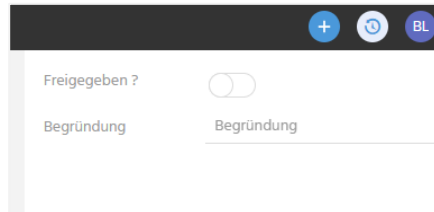
If you execute the "Approve/deny" action, a SmallEdit opens.

A screenshot of the 'SmallEdit' form for approving an offer. It has a dark header with three buttons: a plus sign, a clock, and 'BL'. The form contains three fields: 'Freigegeben ?' with a blue toggle switch turned on, '2. Freigabe nötig' with a grey toggle switch turned off, and 'Begründung' with a text input field.

You can approve the offer.

A screenshot of the 'SmallEdit' form for approving an offer and requesting final approval. It has a dark header with three buttons: a plus sign, a clock, and 'BL'. The form contains three fields: 'Freigegeben ?' with a blue toggle switch turned on, '2. Freigabe nötig' with a blue toggle switch turned on, and 'Begründung' with a text input field.

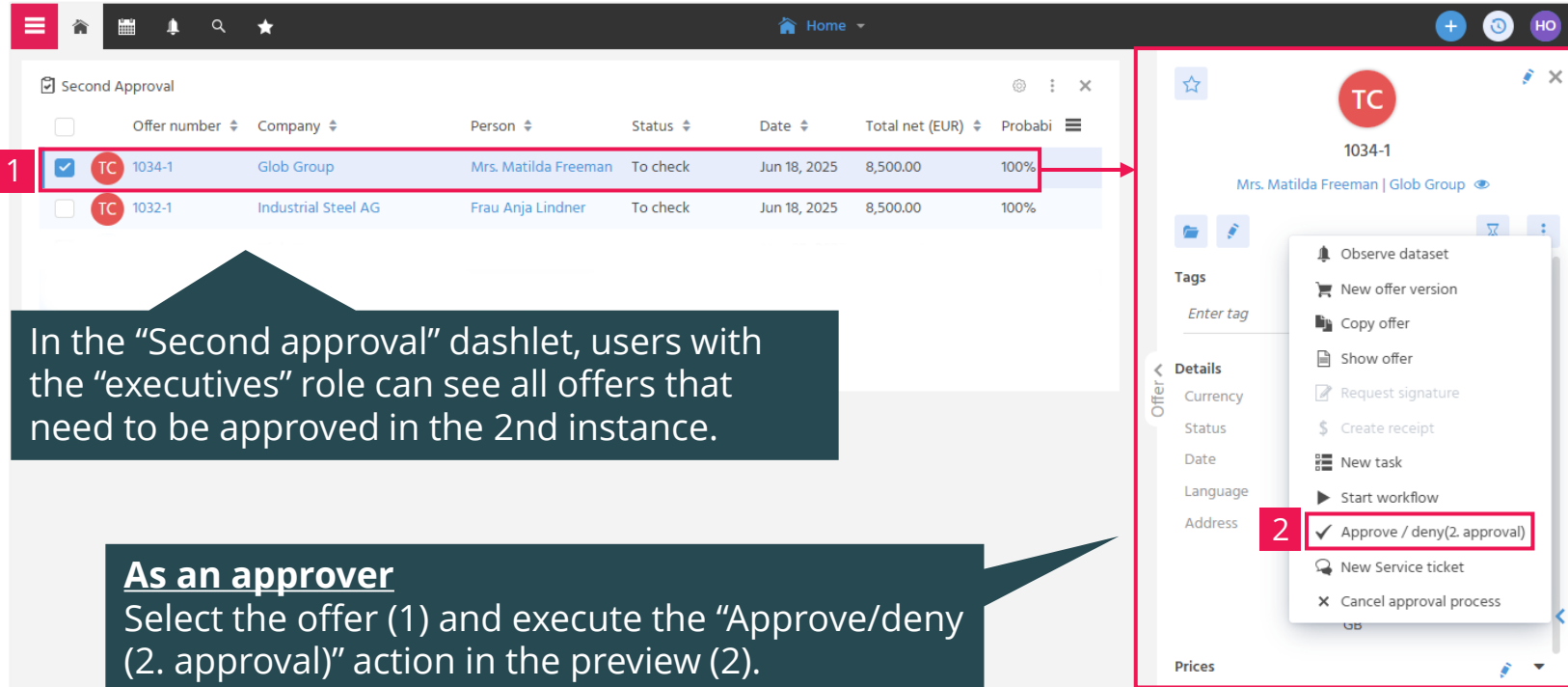
You can approve the offer and request final approval from a colleague with the role "executives".

A screenshot of the 'SmallEdit' form for rejecting an offer. It has a dark header with three buttons: a plus sign, a clock, and 'BL'. The form contains two fields: 'Freigegeben ?' with a grey toggle switch turned off, and 'Begründung' with a text input field.

You can reject the offer.

Approval workflow

Approver of the 2nd approving instance receives the request



The screenshot displays the 'Second Approval' dashlet in the ADITO interface. It features a table of offers and a detailed view of a selected offer.

Table of Offers:

	Offer number	Company	Person	Status	Date	Total net (EUR)	Probabi
1	TC 1034-1	Glob Group	Mrs. Matilda Freeman	To check	Jun 18, 2025	8,500.00	100%
	TC 1032-1	Industrial Steel AG	Frau Anja Lindner	To check	Jun 18, 2025	8,500.00	100%

Offer Details (1034-1):

Mrs. Matilda Freeman | Glob Group

Actions:

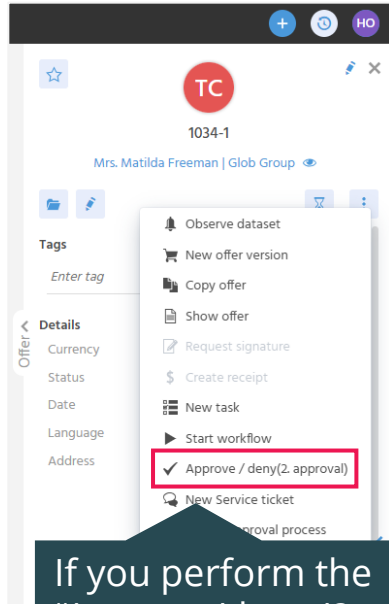
- Observe dataset
- New offer version
- Copy offer
- Show offer
- Request signature
- Create receipt
- New task
- Start workflow
- Approve / deny(2. approval)**
- New Service ticket
- Cancel approval process

Text Box 1: In the "Second approval" dashlet, users with the "executives" role can see all offers that need to be approved in the 2nd instance.

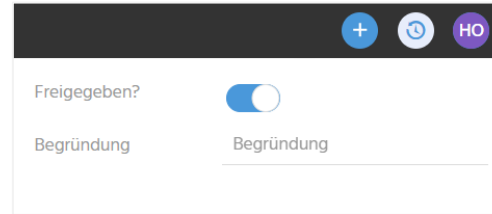
Text Box 2: As an approver
Select the offer (1) and execute the "Approve/deny (2. approval)" action in the preview (2).

Approval workflow

Approver of the 2nd approving instance processes the request

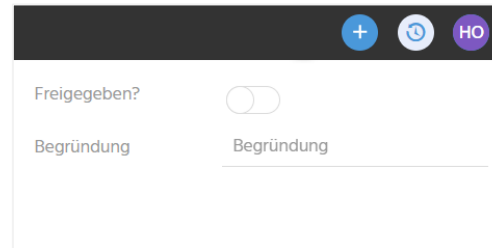


If you perform the "Approve/deny (2. approval)" action, a SmallEdit opens.



This screenshot shows the 'Freigegeben?' (Released?) form. The toggle switch is turned on, indicated by a blue bar. Below it, there is a text input field labeled 'Begründung' (Justification).

You can approve the offer.

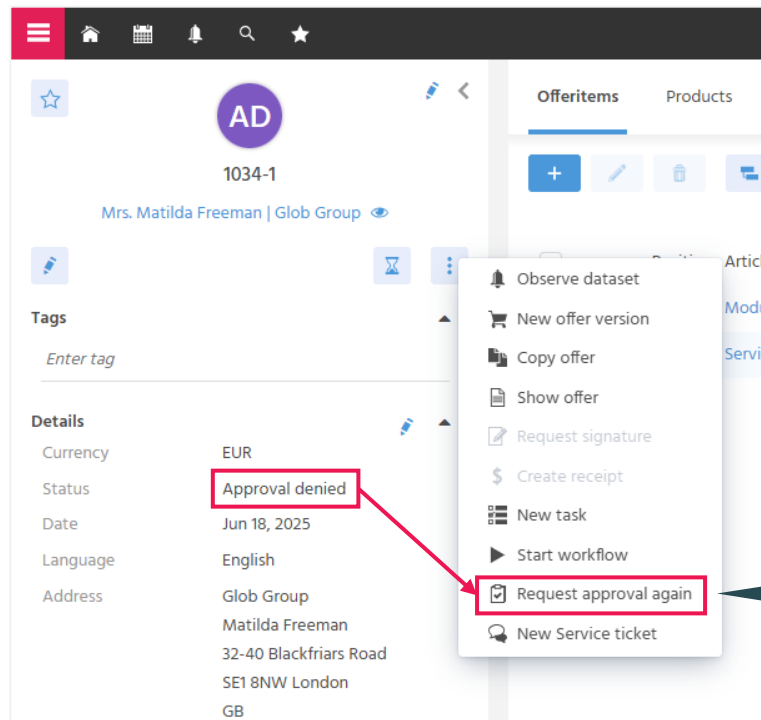


This screenshot shows the 'Freigegeben?' (Released?) form. The toggle switch is turned off, indicated by a grey bar. Below it, there is a text input field labeled 'Begründung' (Justification).

You can reject the offer.

Approval workflow

Request approval again



The screenshot shows the ADITO user interface. At the top, there's a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this, the user profile 'AD' is visible. The main content area shows details for '1034-1' under 'Mrs. Matilda Freeman | Glob Group'. A 'Tags' section has an input field 'Enter tag'. A 'Details' section lists various attributes: Currency (EUR), Status (Approval denied), Date (Jun 18, 2025), Language (English), and Address (Glob Group, Matilda Freeman, 32-40 Blackfriars Road, SE1 8NW London, GB). A dropdown menu is open over the 'Status' field, showing options: Observe dataset, New offer version, Copy offer, Show offer, Request signature, Create receipt, New task, Start workflow, Request approval again (highlighted with a red box), and New Service ticket. A red arrow points from the 'Approval denied' status to the 'Request approval again' option.

If the approval is rejected, you can make changes to the offer and request approval again.

Approval workflow



Offer status

Offers: 41

☐	Offer number	Company	Person	Status	Date	Total net (EUR)	Pr
☐	AP 1036-1	Industrial Steel AG	Frau Anja Lindner	Approved	Jun 18, 2025	7,500.00	100%
☐	OP 1035-1	Glob Group	Mrs. Matilda Freeman	Open	Jun 18, 2025	7,500.00	100%
☐	AD 1034-1	Glob Group	Mrs. Matilda Freeman	Approval denied	Jun 18, 2025	8,500.00	100%
☐	OP 1033-1	Industrial Steel AG	Frau Anja Lindner	Open	Jun 18, 2025	7,500.00	100%
☐	TC 1032-1	Industrial Steel AG	Frau Anja Lindner	To check	Jun 18, 2025	8,500.00	100%
☐	OP 1031-1	Industrial Steel AG	Frau Anja Lindner	Open	Jun 18, 2025	7,500.00	100%
☐	WO 1030-1	Glob Group	Mrs. Matilda Freeman	Won	Jun 18, 2025	8,500.00	100%
☐	SE 1029-1	Industrial Steel AG	Frau Anja Lindner	Sent	Jun 18, 2025	8,500.00	100%
☐	SE 1028-1	Glob Group		Sent	May 28, 2025	73,100.00	50%

Open: The approval has not yet been requested.

To check: The 1st or 2nd approval has been requested but not yet processed.

Approved: The approval was granted.

Approval denied: The approval was rejected.

Sent: The offer has been sent to the customer.



Approval workflow



You can also see whether the offer has already been approved or not in the “Activities” tab.

Offer - 1034-1 | Approved

Offeritems Products Receipts Cover letter **Activities** Tasks Documents Operations/Tasks Digital Signature Logs

+ [Icons] Cancel ID Observation Observe dataset Set attribute Export [Icons] Filter

Filter content...

Activities: 4

- Jun 20, 2025, 9:17 AM ✓ Offer has been approved (2 approval levels) [Offer: 1034-1] (Herr Herbert Obermeier)
The approval process has been approved by "Herr Herbert Obermeier".Reason: "Major project" A 2nd approval was considered necessary by "Frau Birgit Leicht".Reason: "Major project" The approval process was started by "Frau Melanie Hueber".
- Jun 20, 2025, 8:19 AM ✓ New approval request [Offer: 1034-1] (Frau Melanie Hueber)
The approval process was started by "Frau Melanie Hueber".
- Jun 18, 2025, 2:47 PM ✓ Offer has been declined (2 approval levels) [Offer: 1034-1] (Herr Herbert Obermeier)
The approval process has been declined by "Herr Herbert Obermeier".Reason: "Adjust prices according to agreement" A 2nd approval was considered necessary by "Frau Birgit Leicht".Reason: "Major project" The approval process was started by "Frau Melanie Hueber".
- Jun 18, 2025, 11:29 AM ✓ New approval request [Offer: 1034-1] (Frau Melanie Hueber)
The approval process was started by "Frau Melanie Hueber".



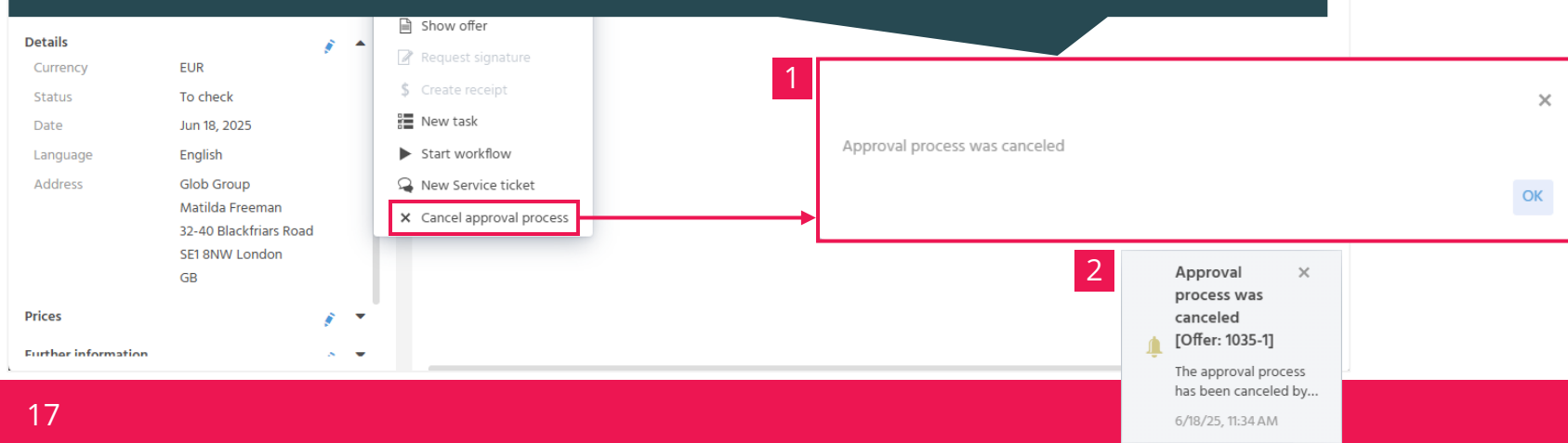
Approval workflow

Cancel approval process

If the approval workflow has been started, you will find the action “Cancel approval process”. If you execute the action,

- the system confirms that the approval process has been canceled (1) and
- the system displays a notification about the termination to the user who started the approval workflow (2).

The workflow cannot be restarted for this offer.



The screenshot displays the ADITO user interface. On the left, a sidebar shows details for an offer, including currency (EUR), status (To check), date (Jun 18, 2025), language (English), address (Glob Group, Matilda Freeman, 32-40 Blackfriars Road, SE1 8NW London, GB), and prices. A dropdown menu is open, showing various actions. The 'Cancel approval process' option is highlighted with a red box and labeled with a red '1'. An arrow points from this option to a confirmation dialog box, also labeled with a red '1'. The dialog box contains the text 'Approval process was canceled' and an 'OK' button. Below the dialog box, a notification is displayed, labeled with a red '2'. The notification title is 'Approval process was canceled' and it includes the offer ID '[Offer: 1035-1]'. The message states 'The approval process has been canceled by...' and shows the timestamp '6/18/25, 11:34 AM'.

Details

Currency EUR

Status To check

Date Jun 18, 2025

Language English

Address Glob Group
Matilda Freeman
32-40 Blackfriars Road
SE1 8NW London
GB

Prices

Further information

Show offer

Request signature

Create receipt

New task

Start workflow

New Service ticket

Cancel approval process

1

Approval process was canceled

OK

2

Approval process was canceled

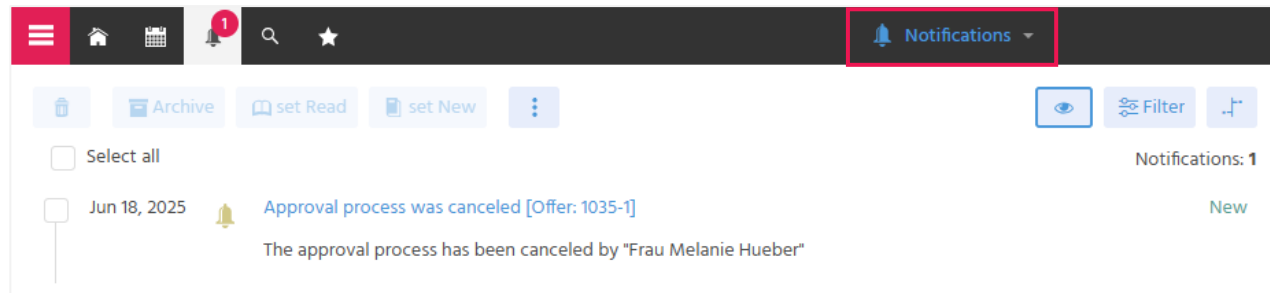
[Offer: 1035-1]

The approval process has been canceled by...

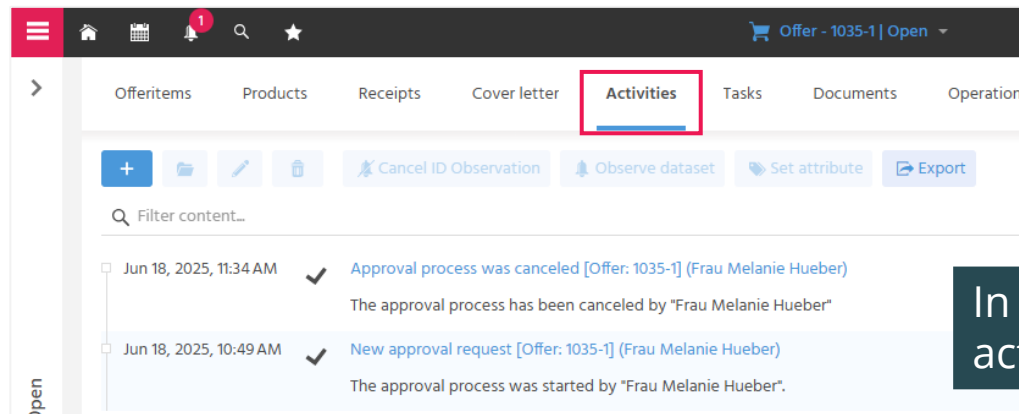
6/18/25, 11:34 AM

Approval workflow

Cancel approval process



The screenshot shows the ADITO notification center. The top navigation bar includes a menu icon, home, calendar, a notification bell with a red '1', search, and star icons. The 'Notifications' dropdown is highlighted with a red box. Below the navigation bar, there are buttons for 'Archive', 'set Read', 'set New', and a three-dot menu. A 'Select all' checkbox is present. The notification list shows a notification from 'Jun 18, 2025' with a bell icon. The notification text is: 'Approval process was canceled [Offer: 1035-1]' followed by 'The approval process has been canceled by "Frau Melanie Hueber"'. The notification is marked as 'New'.



The screenshot shows the 'Activities' tab for offer 1035-1. The top navigation bar includes a menu icon, home, calendar, a notification bell with a red '1', search, and star icons. The 'Offer - 1035-1 | Open' dropdown is visible. Below the navigation bar, there are tabs for 'Offeritems', 'Products', 'Receipts', 'Cover letter', 'Activities' (highlighted with a red box), 'Tasks', 'Documents', and 'Operation'. Below the tabs, there are buttons for '+', 'Cancel ID Observation', 'Observe dataset', 'Set attribute', and 'Export'. A search bar 'Filter content...' is present. The activity list shows two activities: 'Approval process was canceled [Offer: 1035-1] (Frau Melanie Hueber)' and 'New approval request [Offer: 1035-1] (Frau Melanie Hueber)'. Both activities are marked with a checkmark and have a timestamp of 'Jun 18, 2025'. The first activity has a timestamp of '11:34 AM' and the second has '10:49 AM'. The first activity text is 'The approval process has been canceled by "Frau Melanie Hueber"'. The second activity text is 'The approval process was started by "Frau Melanie Hueber"'. The 'open' button is visible on the left side.

In addition to the notification, an activity is created in the offer.

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