

How to approve tasks in ERP Gold

As a manager you will be required to approve some tasks within ERP Gold including such requests as annual leave, variable claims and purchase of additional annual leave. You will receive a email alert to advise you that you are required to authorise something in ERP Gold.

Locating your task list

You should log into your ERP Gold account or click on the link you receive in the email alert. Click onto the home page. In the top right hand corner you will see a 'tick' with a number next to it. The number indicates the number of tasks you have to approve.

The screenshot shows the ERP Gold home page. At the top left, there is a 'Home page' callout pointing to the 'Business World On!' header. At the top right, there is a callout 'Click here to open your task list' pointing to a notification icon (a tick with the number 1) in the top right corner. The main content area is divided into several sections: 'Menu' on the left, 'Start pages' in the middle, 'Your employment' on the right, and 'Favourites' and 'Recently used' on the far right.

If you click on the 'tick', you will open your task list. Click on the task you wish to approve.

The screenshot shows the ERP Gold task list interface. A callout 'A list of your tasks will appear' points to a 'Your tasks' pop-up window. The pop-up window shows a task with the text 'Line Manager Approval Resource ID: 235100002 Abs. code: AL' and a 'Go to Task management' button. The main content area is divided into several sections: 'Your employment' on the left, 'Favourites' in the middle, and 'Recently used' on the right.

The task that you are required to approve will appear, for example an annual leave request

Line Manager Approval x

Absences

Map	Action	Workflow state	Resource ID	Absence co...	Position	Absence re...	Date from	Date to	Open	Time from	Time to
		Workflow in progress	Betty Boop	AL			24/02/2018	24/02/2018	<input type="checkbox"/>	00:00	00:00

Absence entry

Resource ID: 235100002
 Absence code: Annual Leave
 Status: Active

Date from: 24/02/2018
 Date to: 24/02/2018
 Time from: 00:00
 Days: 0
 Percent: 100.00

Buttons: Approve, Reject, Advanced mode, Log book, Export

You can approve or reject the request

The details of the request will appear here

If you reject the request, you will be asked to provide a reason as to why you have rejected this.

Absence approval

Personnel information | Workflow log (row 1)

Line Manager Approval - Reject

Enter your comment

Buttons: Reject, Copy

If an employee has modified a request i.e. they wish to cancel their leave, the form will indicate that it is a modification and will say deletion in the workflow status. Click on approve to approve the cancellation.

Absences

Map	Action	Workflow state	Resource ID	Absence co...	Position	Absence re...	Date from	Date to	Open	Time from	Time to	Days	Hours	Percent	Status
		Workflow in progress	Betty Boop	AL			24/02/2018	24/02/2018	<input type="checkbox"/>	00:00	00:00	0	0.00	100.00	Active
		Workflow in progress (Delete)	Betty Boop	AL			22/02/2018	22/02/2018	<input type="checkbox"/>	09:00	17:30	1	8.50	100.00	Active

Old values

Buttons: Modify, Approve, Reject, Advanced mode, Log book, Export

The workflow will say Workflow in progress (delete).

The request will say modify

Click here if you are happy to approve the cancellation

You may receive multiple requests for leave from the same person at the same time, but only want to approve one. If you approve in the usual way, it will automatically approve all the requests at the same time. To approve or reject individual requests, you need to open the open the 'Advanced mode'.

⌵ Balances

Absences								
Map	Action	Workflow state	▲ Resource ID	Absence co...	Position	Absence re...	Date from	Date to
		Workflow in progress	Betty Boop	AL			16/04/2018	16/04/2018
		Workflow in progress	Betty Boop	AL			17/04/2018	17/04/2018

Select 'Advanced mode' to enable approval or rejection of individual requests

Approve
Reject
Advanced mode
Log book
Export

Advanced mode allows you to select the specific request you would like to approve or reject.

⌵ Balances

Absences									
<input type="checkbox"/>	Map	Action	Workflow state	▲ Resource ID	Absence co...	Position	Absence re...	Date from	Date to
<input type="checkbox"/>		Approve	Workflow in progress	Betty Boop	AL			16/04/2018	16/04/2018
<input type="checkbox"/>		Reject	Workflow in progress	Betty Boop	AL			17/04/2018	17/04/2018

First Select the leave request you wish to action

Approve
Reject
Undo

Then select whether you wish to approve or reject that request

When you have approved or rejected the requests you want to, simply scroll to the bottom of the screen and click on the 'Save' button, which will clear the requests from your actions.

Please note that the usual 'Approve' and 'Reject' buttons won't work in 'Advanced mode'.

⌵ Details

Save