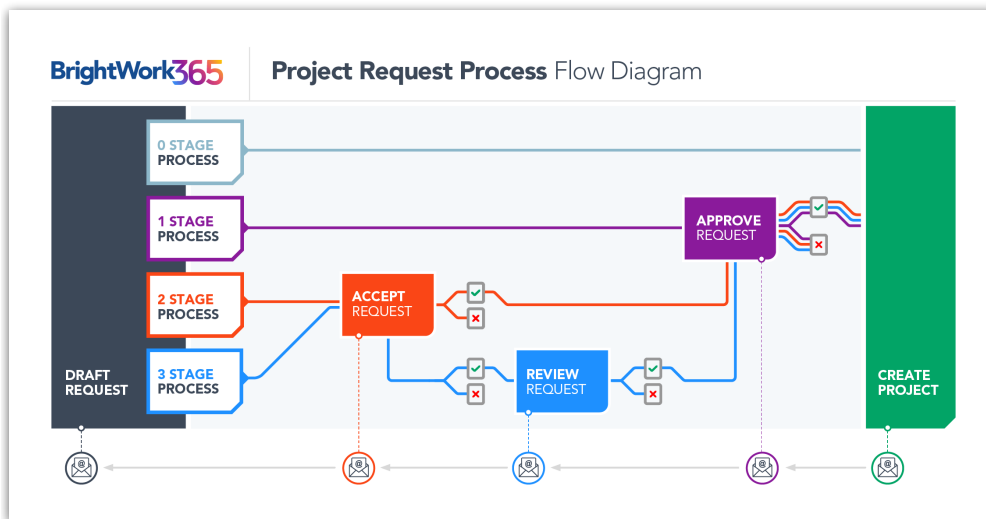


Request Approval Stages

Out of the box, BrightWork 365 supports four request approval stages. The stages relate to the number of approval reviews (0, 1, 2, or 3) a project request will need to pass through before a project gets created.



Project Request - 0 Stage

No approval stages: The project is created without approval. This is to support organizations that do not need an approval process for projects, but still want to retain a record of the project creation.

The associated Business Process Flow has one process element before a project gets created:

- Draft

Project Request - 1 Stage

One stage of approval: The Receiver approves the project for creation.

The associated Business Process Flow has two process elements before a project gets created:

1. Draft
2. Approve

Project Request - 2 Stage

Two stages of approval: The Receiver accepts the request and sends it to the nominated Approvers for approval and subsequent project creation.

The associated Business Process Flow has three process elements before a project gets created:

1. Draft
2. Accept
3. Approve

The following templates use the Project Request - 2 Stage Business Process Flow out of the box:

- Project Standard (can be changed to use a different stage level if desired)
- New Product Introduction
- Product Update

Project Request - 3 Stage

Three stages of approval: The Receiver accepts the request and sends it to the Reviewer for review. If they accept the request, it gets sent to the nominated Approvers for approval and subsequent project creation.

The associated Business Process Flow has four process elements before a project gets created:

1. Draft
2. Accept
3. Review
4. Approve

Request Business Process Flow

The request level is defined by the Business Process Flow (BPF) that is selected in the template settings. BrightWork 365 ships with the four BPFs necessary to support this process.

Customers will be able to add forms of their own to the Request table to support their local request process. However, the forms they choose in the template must include the columns necessary to support the selected request level, e.g., if they opt for Project Request - 3 Stage, the form must have the Receiver, Reviewers and Approvers columns.

Request Notification Workflow

The request notification workflow uses both Power Automate and the Power Automate Approvals solution. There are three flows: Accept Request Approval, Review Request Approval, and Approver Request Approval. The approval solution is used inside of these flows. For example, when a request is submitted, it starts the approval. This sends the

approval email to the approvers. If the request is approved/rejected/sent back to draft, an email is sent using the Outlook Connector inside the flow.

- **1 Stage:**
 - Accept Request Approval
- **2 Stage:**
 - Accept Request Approval
 - Approve Request Approval
- **3 Stage:**
 - Accept Request Approval
 - Review Request Approval
 - Approve Request Approval

Successful completion (i.e. approval) of the last flow in a stage sequence triggers the **Create Project** flow. This flow is also triggered by the creation and submission of a 0 Stage request.
