Bonfire

Approvals

Overview & Highlights

Things to consider when using Approvals in Bonfire:

- If the Approvals feature is enabled on your portal, you will automatically gain access to Approvals for both the Projects and Intake modules
- Buyers are able to set up various approval requests, and send these requests to an approver in order to collect an approval response
- For Approvals on Projects: Any user that can edit the project also has access to create and edit approval requests on the project. Any user who has view access to the full project (ie. observer roles) will be able to view the approval requests on the project
- For Approvals on Intake: Any user that can manage intake requests has access to create and edit approval requests on intake requests. Any user who has view access to the intake request will be able to view the approval requests on the project

Quick Resources

Bonfire Resources/Articles

For help with specific Approvals features and related processes, check out these Bonfire Support articles:

- Approvals
- User Roles in Bonfire

Approvals Checklist

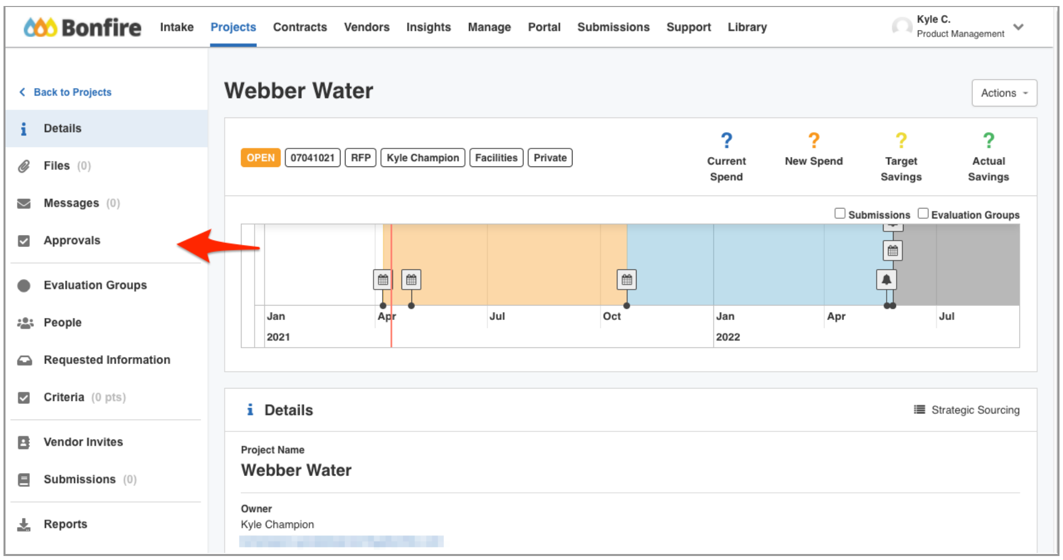
NOTE: The contents of the following sections, unless otherwise stated, apply to Approvals in both Intake and Projects.

Creating and Sending an Approval

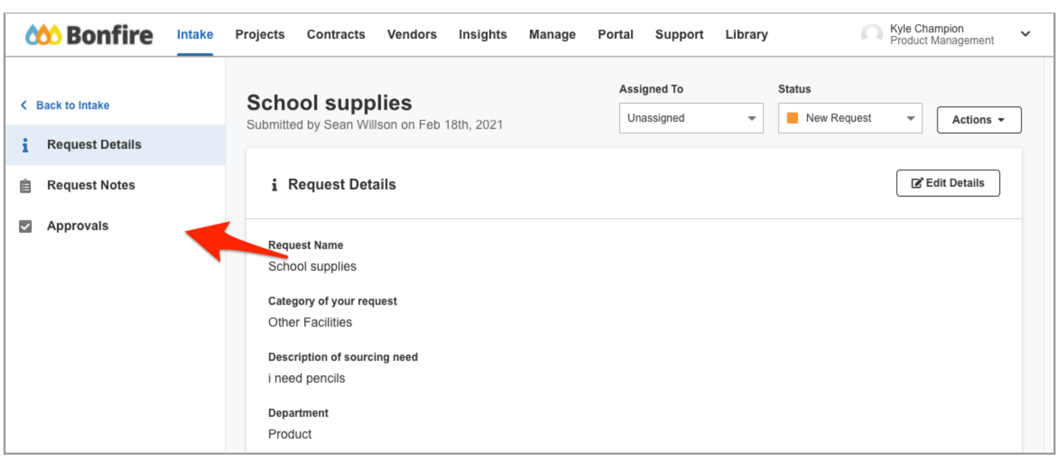
Accessing Approvals

- ❏ On the Project Details page or the Intake Request page, navigate to the Approvals section through the menu on the left.

  From the **Project Details page**



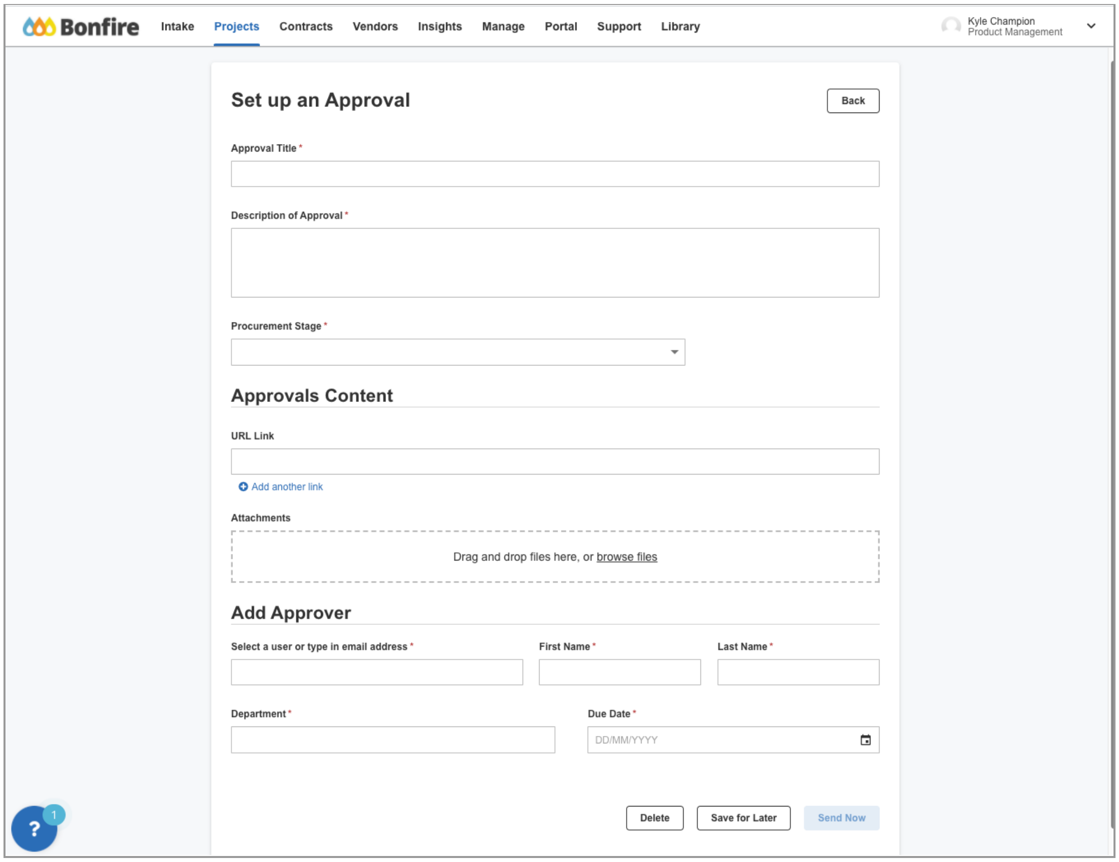
  From the **Intake Request page**



Create and Send an Approval

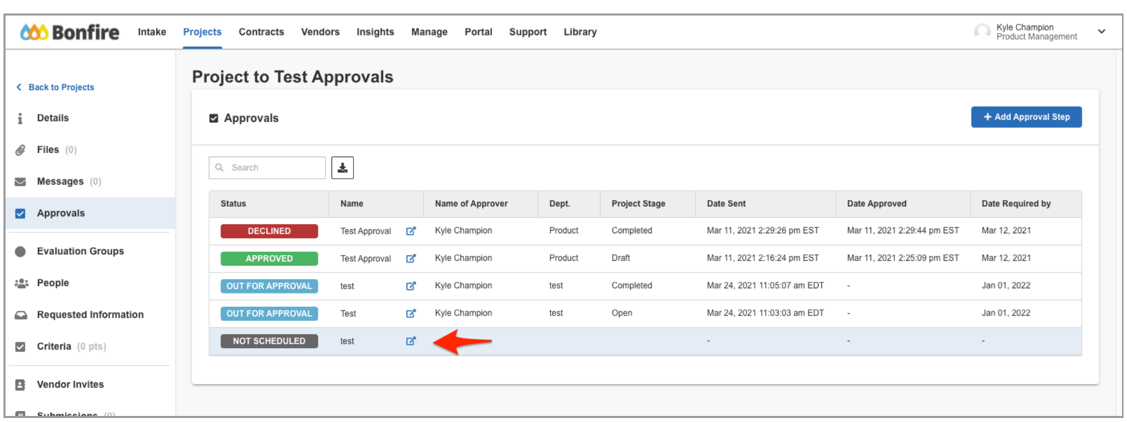
❏ On the Approvals page, click “Add Approval Step” to create and fill out the new Approval Request.

- NOTE: Anyone can be added as an approver. To add an existing user in Bonfire, choose from the dropdown or use the search function. To add new users, fill in their email addresses.



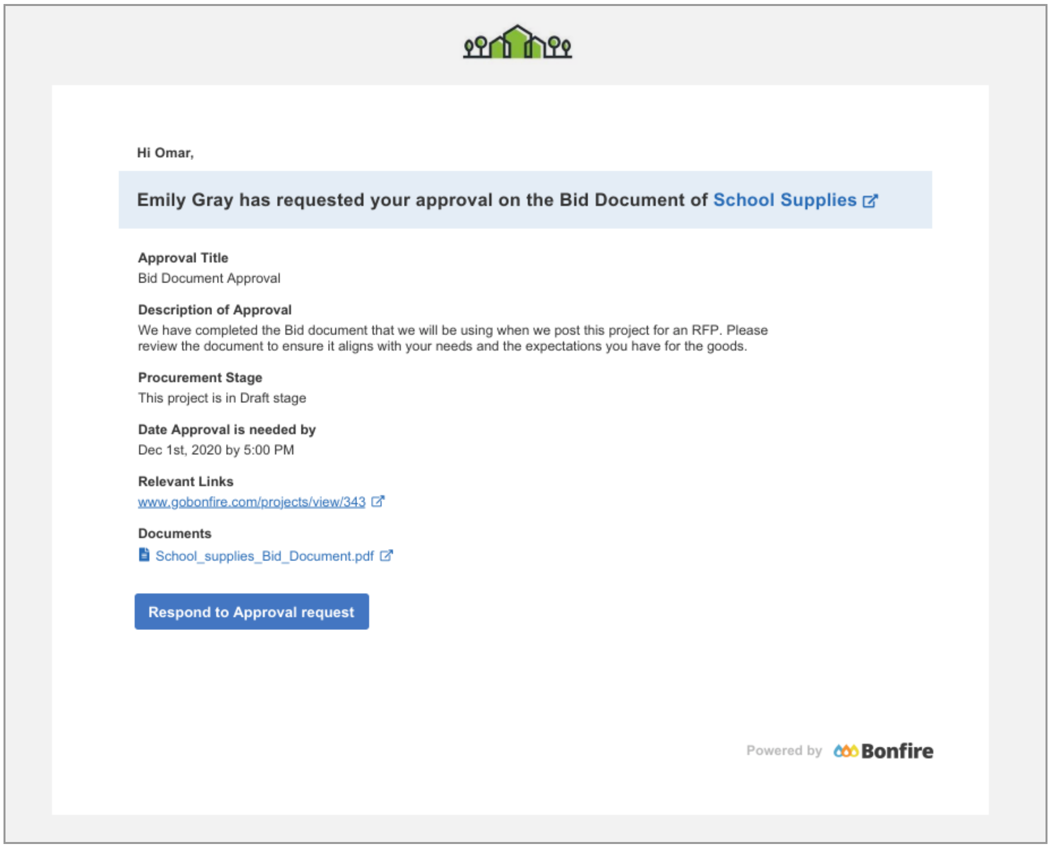
❏ To finalize the request, type in the department the approval is from, and enter a due date for the approval.

❏ Choose between the options “Delete”, “Save for Later”, or “Send Now”. For approval requests that are saved for later, they can be edited by clicking on the link icon next to the title of the approval on the Approvals Index Page. You can also view the status for all approval requests on this page.



Responding to Requests

- Check email for new approval requests or reminders about requests. Click on “Respond to Approval request” to be redirected to the Approval Request Page in Bonfire where you can view information including documents and links.



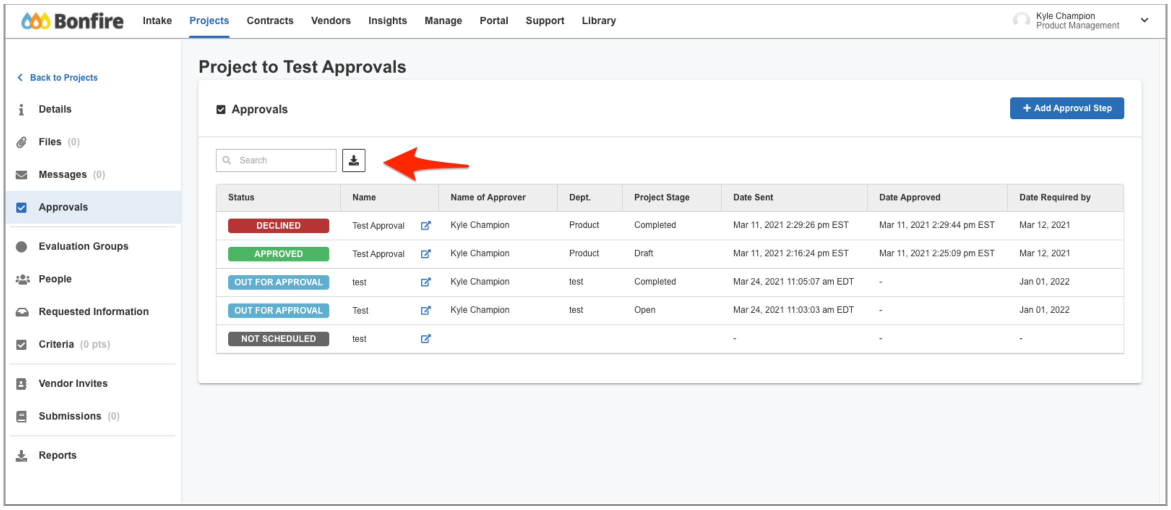
- Respond to the requests by clicking “Approve,” “Decline,” or “Need Clarification.” After responding, the requester will be notified of the new status of the request.

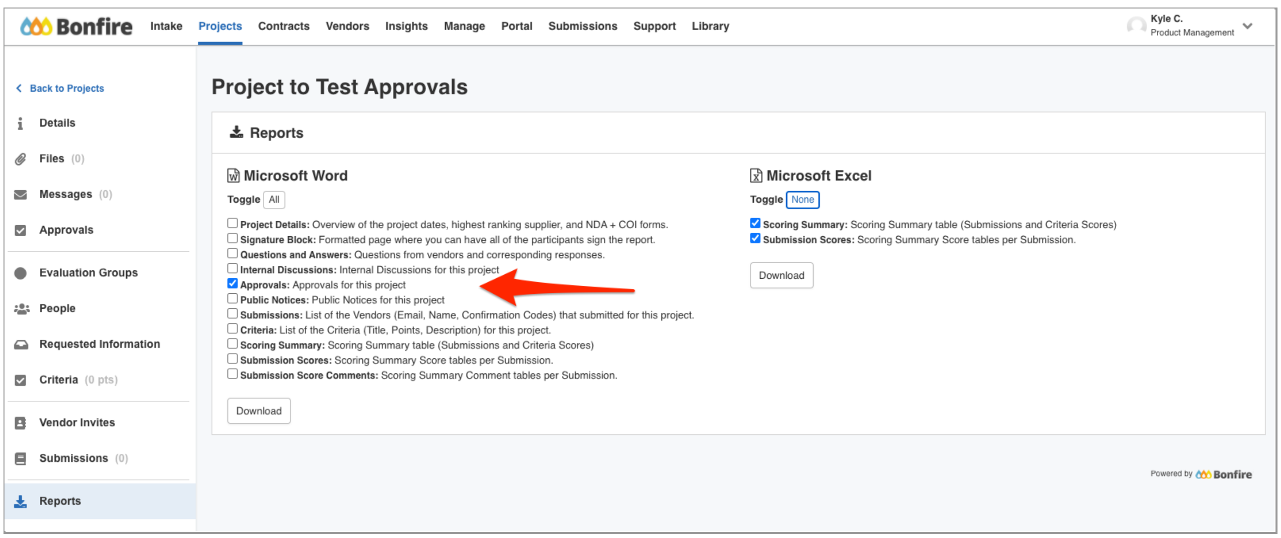
- Approvers can add additional links, documents, and comments to be reviewed by the requester if necessary.

Generating Reports

Downloading Approvals Report for Projects

- Go to the Projects Page for the project that you want to download the report for. Navigate to the Reports tab on the left menu.
- Check off the Approvals checkbox. This will automatically allow Bonfire to include the information on Approvals into the report. You can also include other pieces of information about the project as well. The report downloaded will be in a **Word document** format.

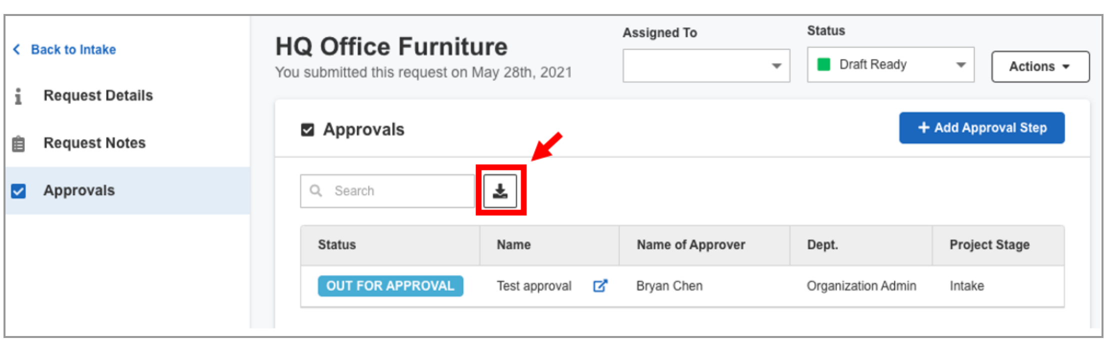




- Alternatively, navigate to the Approvals tab. Use the download button to download the report. This report will include approvals information **exclusively**. It will also be in an **Excel document** format.

Downloading Approvals Report for Intake Requests

- Go to the page for the intake request that you want to download the report for. Navigate to the Reports tab on the left menu.



Frequently Asked Questions

What impact does a declined action have on a project or intake request?

The requester will be informed about the declined request via email notification. The requester can revise the request, edit information and documents, and resubmit the request for approval. There is no limit to the number of times that a request can be declined or resubmitted for approval. The status for all approval requests are tracked on the Approvals Index page, therefore all approval status including the declined status will be recorded.

Can you make edits to the approval requests?

For approval requests in the following stages, the requests are “read only” and cannot be further edited:

- Out For Approval
- Approved
- Declined
- Late

Approval requests with the “Not Scheduled” status **can** be edited as they have not been sent out. You can access the requests from the Approvals Index page and revise any changes needed.

Can an approval request marked as “late” still be approved/declined?

Yes. An email notification is sent to the approver to inform about the “late” status. However, this does not affect the approver’s ability to respond to the request. An approval request does not expire.