

## Feature Overview

# Preset Next Approver

Requisition approvals help ensure any necessary stakeholders in your organization review and approve the specifics of job openings before being posted to applicants. Without a clear workflow for the approval process, however, users are forced to pick the next approver from a long list of users- possibly resulting in mis-routed requisitions and approval delays.

**Preset Next Approver** helps address this potential weak link in the approval chain by providing a way to determine which approver is next in line to receive the requisition. Now there's no more guesswork, no more searching exhaustive lists of users, and most importantly, no more misdirected requisitions.

## What is it exactly?

**Preset Next Approver** simplifies the requisition approval process by establishing a pre-selected user as "next in line" to approve new requisitions after they are reviewed. Now that the **Next to Approve** field is already completed for an approver, they don't need to pick and choose from lengthy employee lists to find the next reviewer - or potentially waste precious time by accidentally selecting the wrong user.

Next approvers are determined at the user level to help ensure users route requisitions to the same (proper) users each time. There's even a way to make the pre-filled **Next to Approve** field read-only, preventing users from changing who receives the requisition for approval.

The screenshot shows a 'Requisition Information' form with tabs for 'Req Details', 'Attached Documents', and 'History Detail'. Under the 'Approvals' section, there are radio buttons for 'Approve' (selected) and 'Reject'. Below that is an 'Approval Complete' checkbox, a 'Comment' field with the text 'No more confusion about who approves next!', and a 'Next To Approve' field containing 'Admin, Brad'. 'Save' and 'Cancel' buttons are at the bottom.

## How do I use it?

The default Next to Approve recipient for a specific user is determined by the **Sends Req Approval To** field on the *User Details* page, which can be set by an Administrator. The user chosen in this field automatically populates the **Next to Approve** field during requisition approvals. This field displays as read-only, or remains editable and is pre-populated with the next user depending on whether the **Edit Next Approver** permission is disabled or enabled.

The screenshot shows a 'Functions' form with fields for 'User Role(s)' (Hiring Manager; Requisition Approver), 'Title Category' (Please Select), 'Reports To', 'Sends Req Approval To' (A Approver, Kelli), 'Position in Hierarchy' (Children Center), and 'Areas of Responsibility'. The 'Sends Req Approval To' field is highlighted with a green box.

Depending on the style of workflow you want to initiate in your organization or department's requisition approval process, there are a couple of different approaches that could be taken when using Preset Next Approver.

- In one instance, let's say there is one final approver who must "OK" every requisition before they are posted. This approver has multiple department heads reporting to them, and each of these heads are in charge of drafting requisitions for their respective departments. In this case, each department head would have the final approver set as their Next to Approve.
- Another approach to take with this feature is to set up a "chain" of approvers. This is useful for situations where several stakeholders in a department or organization each need to validate new requisitions before they are posted. After one user approves, it's sent to the next approver, then the next, and so on until the last person in this process is able to mark the requisition approval as complete.

The screenshot displays the 'Add Requisition' interface for 'Submit Requisition LPN [Req # 2496] for Approval'. The 'Next To Approve' field is set to 'Manager, Ryan'. A callout bubble states: 'Ryan is sent this requisition first...'. The 'Requisition Workflow History' table shows the following sequence:

Date	Action	User
2/2/2017	Created	Manager, Lenora
2/2/2017	Sent To	Manager, Ryan
2/2/2017	Approved	Manager, Ryan
2/2/2017	Sent To	Manager, Cindy
2/2/2017	Approved	Manager, Cindy
2/2/2017	Sent To	Manager, Natalie
2/2/2017	Approved	Manager, Natalie
2/2/2017	Sent To	A Approver, Kelli
2/2/2017	Approved	A Approver, Kelli
2/2/2017	Approval Complete	A Approver, Kelli

A callout bubble states: '...and the reviews proceed with various stakeholders until Kelli receives it and gives the final OK.' The 'Comment' field contains: 'Looks great. Posting now!' and the status is 'Last Modified by A Approver, Kelli on 2/2/2017'.

## The Fine Print

To best make use of this feature, there are some additional details you should know.

- Preset Next Approver is available now for all symplr Recruiting users, free of any additional cost.
- Admins may need to disable the **Edit Next Approver** and **Reassign Approver** permissions for some existing user roles to avoid the potential for these users to still change their pre-selected approver.
- The **Complete Approval** permission overrides the **Edit Next Approver** one, so users with both permissions are able to complete an approval even then they have a Next Approver set.
- Preset next Approver needs to be activated by a symplr Support specialist. Give them a call at (866) 323-3030 or email [talentsupport@symplr.com](mailto:talentsupport@symplr.com) and they'll be happy to set it up.