

Approval Workflows: Ownership & Routing

Cybergrants Webinar

Meet Your Trainer

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Learning Objective

To explore using ownership and routing within your approval workflows to establish a robust and comprehensive approval process.

Agenda

Request Ownership Mapping

Approval Rules

Request Ownership Mapping

Request mapping rules (also called “domains”) are used to assign an internal CyberGrants user as the “owner” of various types of transactional data based on either predetermined criteria or user specific processes.

Rule criteria could be...

Request
Invitation
Code

Request Region

Country

Proposal
Type

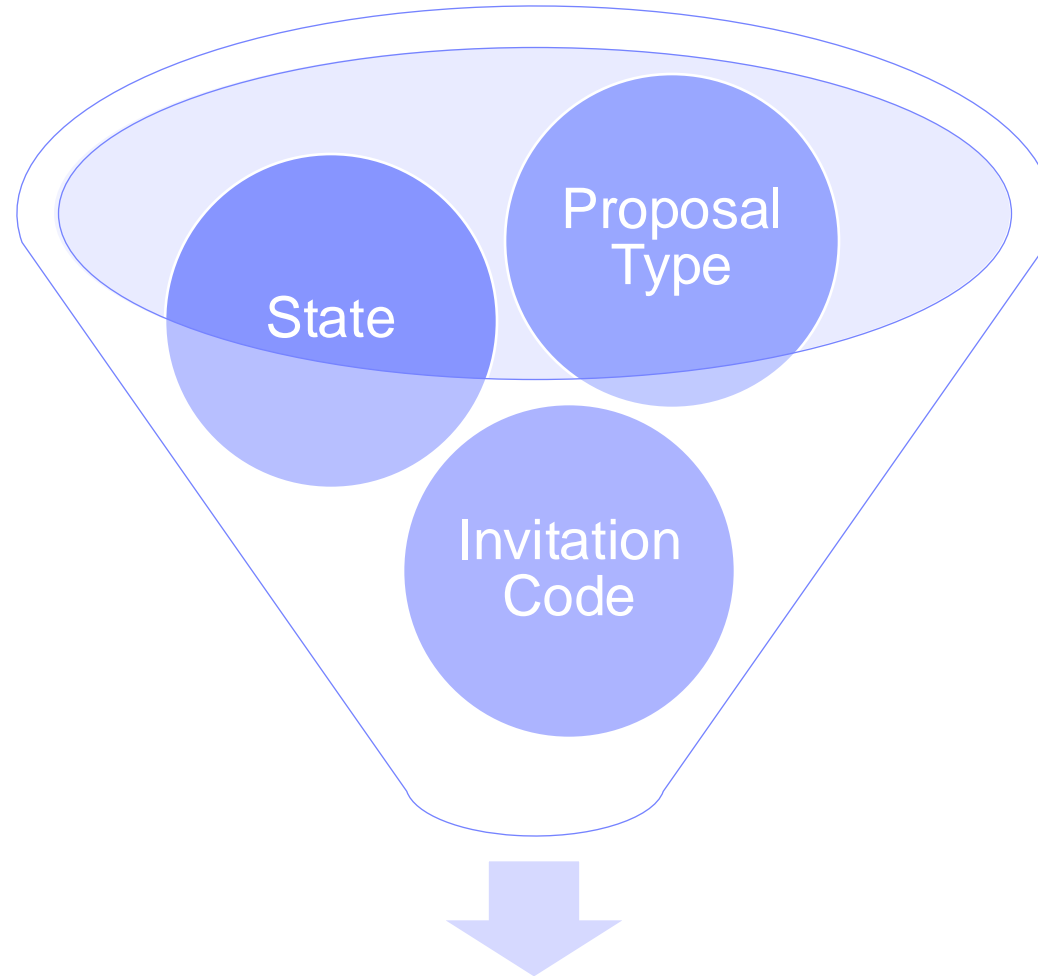
Request
Funding
Principle

State

Request
Type

Request
Strategy

User Specific Mapping Rule



User ID: 1712

Let's walk through this together

1. Admin Tab -> Workflow Management -> Ownership Routing Setup -> select the transaction type you are setting up a rule for
2. Create New Mapping Rule by clicking on the blue button at the bottom of your list
3. Enter the:
 - Name of the rule
 - Whether it is active or not
 - Type of rule – leave as Ownership Routing Rule
 - User – who is the approver for requests that meet the criteria we are setting up
 - Criteria – add in any rule specific criteria
4. Save, Publish (if ready) & Done!

Criteria Count

le ID	User Name	Criteria Count
66	Joshua Capehart	1
04	Project Lotus	2
	Wei-Wei Liu	0
	Max Kartsev	1
4	Wei-Wei Liu	1
2		1
62	Gina Scalise	2
0	Ron Campo	1
06	Project Lotus 2	2

Criteria

Organization Country

- (Not Applicable)
- Afghanistan
- Alderney

Select Criteria

- Criteria Weight Increment**
- Criteria Weight Increment 4
- Criteria Weight Increment 5
- Criteria Weight Increment2
- Criteria Weight Increment3
- Organization City
- Organization Country
- Organization County

Search by Request Routing Rule

Search

Enter Keyword(s) All of the Words ▾

Proposal Type: -- All -- FrontDoor Organization: -- All -- Request Disposition: -- All -- Request Year: -- All --

Request ID: -- All -- Submitted/Request Date: -- All -- Request Routing Rule: Megan Agency Grant Proposal ...

Search Results

Showing 1-3 of 3 results

Request Owner	Request Disposition	Proposal Type	Organization Legal Name
Megan Dodds	Pending ⌛	Megan Agency Grant Proposal	THE MEGAN AGENCY
Megan Dodds	Pending ⌛	Megan Agency Grant Proposal	THE MEGAN AGENCY
Megan Dodds	Pending ⌛	Megan Agency Grant Proposal	THE MEGAN AGENCY

Approval Rules

Approval Rule Tool



Allows admins to define customized approval process for grant requests



Directs requests to the correct users for review and approval at each stage of the process

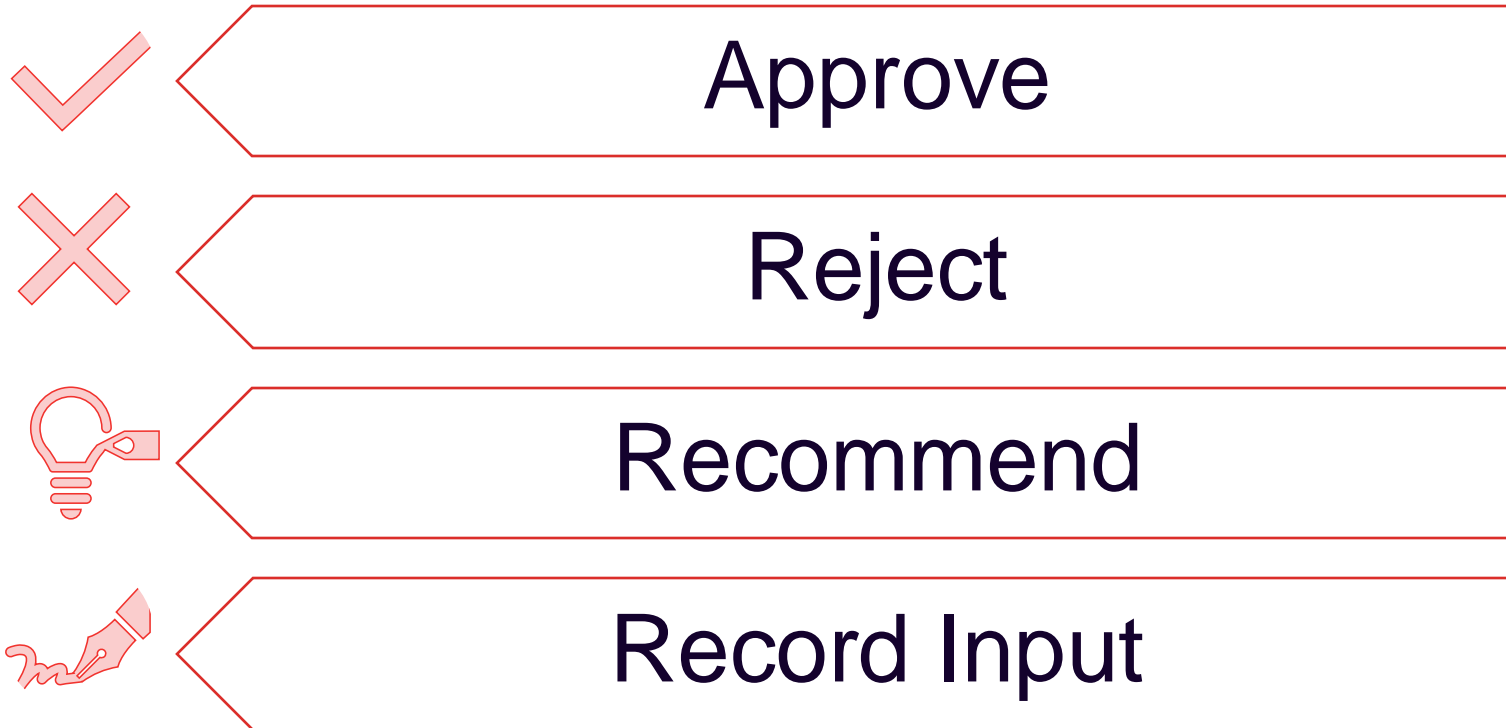


Can be a singular or multi step process that changes based on applicants' responses



Flexibility of this tool caters to your organizations needs for rule complexity

Each approval step allows for a set of actions that a user can take:

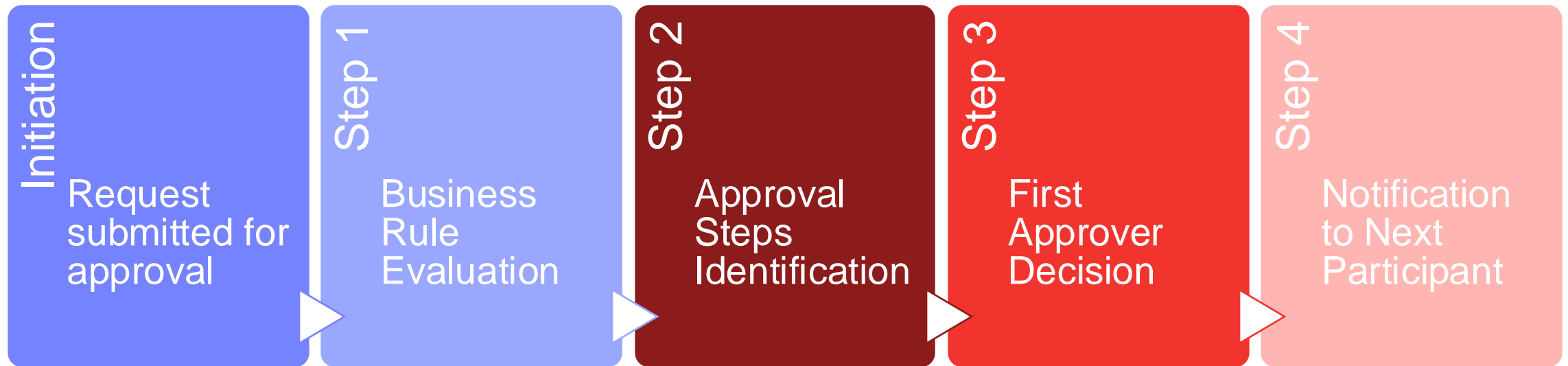


Approval Rule Criteria

You can use a variety of criteria to determine approval pathways:

- Request Invitation Code
- Request Region
- Country

Approval Workflows



Creating Approval Rules

1. Admin Tab -> Workflow Management -> Approval Setup -> select the transaction you are setting up a rule for
2. Scroll down to “New Approval Rule”
3. Enter the:
 - Rule Name
 - Description
 - Active Checkbox
 - Auto Disposition
 - Recommended amounts
 - Settings
 - Criteria
 - Workflow Steps
 - Save, Publish (if ready) and Done!

Additional Resources

- Help Center accessible from the top right hand user badge in CyberGrants

Additional Training Opportunities

- On-demand Videos available in our [Bonterra Academy](#)
- Additional webinars and training content to come!

Thank you for attending!

We hope to see you
in future trainings.