Workflow Approval

Learn how to configure and manage **Approval Workflows** in the TankhaPay Business Portal to streamline employee request approvals and ensure a structured decision-making process.

In this video, we walk you through the complete setup of approval workflows, enabling managers and administrators to review, approve, or reject employee requests directly from the business portal.

You'll learn how to:

- Create customized approval workflow templates
- Configure department-wise or employee-specific approval hierarchies
- Set up workflows for leave requests, on-duty requests, missed punch corrections, travel requests, work-from-home applications, and other employee approvals
- Define single-level or multi-level approval structures
- Assign approvers based on reporting hierarchy
- Choose between strict and flexible approval modes
- Manage employee applications efficiently through a centralized approval system

Once configured, employee requests submitted through the TankhaPay Employee App are automatically routed to the designated approvers, ensuring faster decision-making, improved transparency, and better process control.

TankhaPay’s Approval Workflow feature helps organizations automate approval processes, reduce manual follow-ups, strengthen accountability, and create a seamless employee experience across all workforce operations.

- Overview Video

Overview Video

Step-by-Step Tutorial Guide

Step 1: Open Approval Workflow

1. Log in to the TankhaPay Business Portal.
2. From the left-side navigation menu, go to **Business Settings**.
3. Click on **Approval Workflow**.

The Approval Workflow page displays all existing approval configurations.

Step 2: Create a New Approval Workflow

1. Click on the **Add Approval Workflow** button.
2. The **Add Approval Workflow** pop-up window will open.

This form is used to create a new approval process for employee requests.

Step 3: Enter the Template Name

1. In the **Template Name** field, enter a name for the workflow.

2. Use a descriptive name that identifies the approval process.

Example:

- Leave Approval Workflow
- Attendance Approval Workflow
- Travel Approval Workflow

This makes it easier to manage multiple approval templates.

Step 4: Select the Hierarchy Type

Under **Hierarchy Type**, choose how the workflow will be assigned.

Options available:

- **Department**
- **Employee**

Department-Based Workflow

Select this option if the workflow should apply to an entire department.

Employee-Based Workflow

Select this option if the workflow should apply to specific employees.

Step 5: Select Department or Employee Details

Depending on the hierarchy type selected:

If Department is Selected

1. Select the **Department Name**.
2. Select the **Designation** if required.

If Employee is Selected

1. Select the employee(s) from the employee list.
2. Assign the workflow to the selected employees.

This determines who will follow the approval workflow.

Step 6: Select the Module Name

1. Open the **Module Name** dropdown.
2. Choose the module for which approvals are required.

Examples may include:

- Leave Management
- Attendance
- Missed Punch
- On Duty
- Work From Home
- Travel Request
- Expense Request

The selected module will use the configured approval process.

Step 7: Select the Approval Mode

1. Open the **Mode** dropdown.

2. Select the approval mode.

Available options:

- **Serial**
- **Flexible**

Serial Mode

Approvals follow a fixed sequence.

Example:
Manager → HR → Admin

Flexible Mode

Approvals can be processed without a strict sequence.

Choose the mode that matches your organization's approval process.

Step 8: Select Employees

1. Under the **Employees** field, select the employees who should be covered by this workflow.
2. Multiple employees can be selected if required.

This maps the workflow to the intended users.

Step 9: Configure Approvers

1. Click on **Configure Approver**.
2. The approval hierarchy section will become available.

This section is used to define who approves employee requests.

Step 10: Add Approval Levels

1. Click on **Add Approver Level**.
2. Create the first level of approval.

Example:

- Level 1 – Reporting Manager

Multiple approval levels can be added depending on organizational requirements.

Step 11: Assign Reporting Hierarchy

For each approval level:

1. Select the approver.
2. Define the reporting relationship.
3. Configure approval responsibilities.

Example:

- Level 1 – Reporting Manager
- Level 2 – Department Head
- Level 3 – HR Manager

This ensures requests follow the correct approval chain.

Step 12: Save the Workflow

1. Review all configured information:
   - Template Name
   - Hierarchy Type

    - Module Name
    - Approval Mode
    - Assigned Employees
    - Approval Levels
2. Click **Add** or **Save**.

The workflow is now created successfully.

Step 13: Verify the Workflow

1. Return to the Approval Workflow list page.
2. Locate the newly created workflow.
3. Verify:
    - Template Name
    - Module Name
    - Mode Type
    - Reporting Structure
    - Number of Employees Assigned
    - Status

This confirms the workflow has been configured successfully.

Step 14: Manage Existing Approval Workflows

From the workflow list page, administrators can:

- View workflow details
- Edit workflows
- Activate or deactivate workflows
- Modify approval levels
- Update employee assignments
- Delete unused workflows

This helps keep approval processes updated as organizational requirements change.

Key Benefits of Approval Workflow

- Structured approval hierarchy
- Faster request processing
- Reduced manual follow-ups
- Department-wise approval control
- Employee-specific approval configuration
- Multi-level approval management
- Improved transparency and accountability

End of Tutorial

You have successfully learned how to create and manage **Approval Workflows** in TankhaPay. This feature ensures employee requests are routed through the correct approval hierarchy, improving efficiency and governance across the organization.