

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.

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