

Configuring a request type control

This feature allows you to configure a request-type control. You must have the superuser role to use this feature.

STEP 1

From the menu, navigate to the list of controls (under **Configuration, Controls**), then click on **New control**.

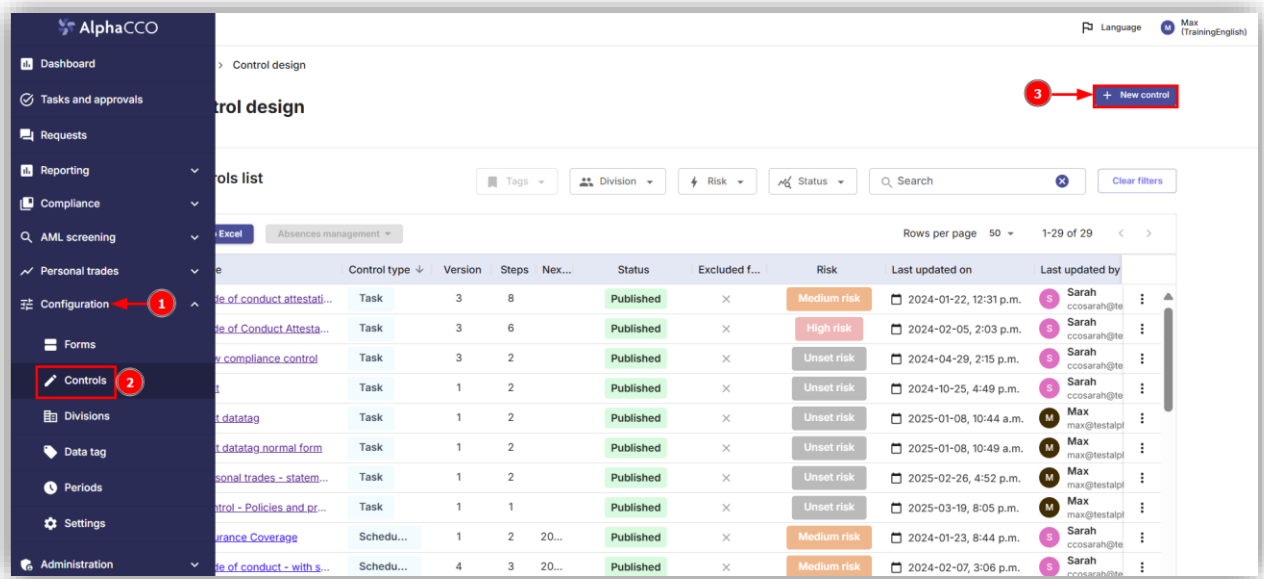


Figure 1: Control list page

STEP 2

Enter the control name and click on **Create**.

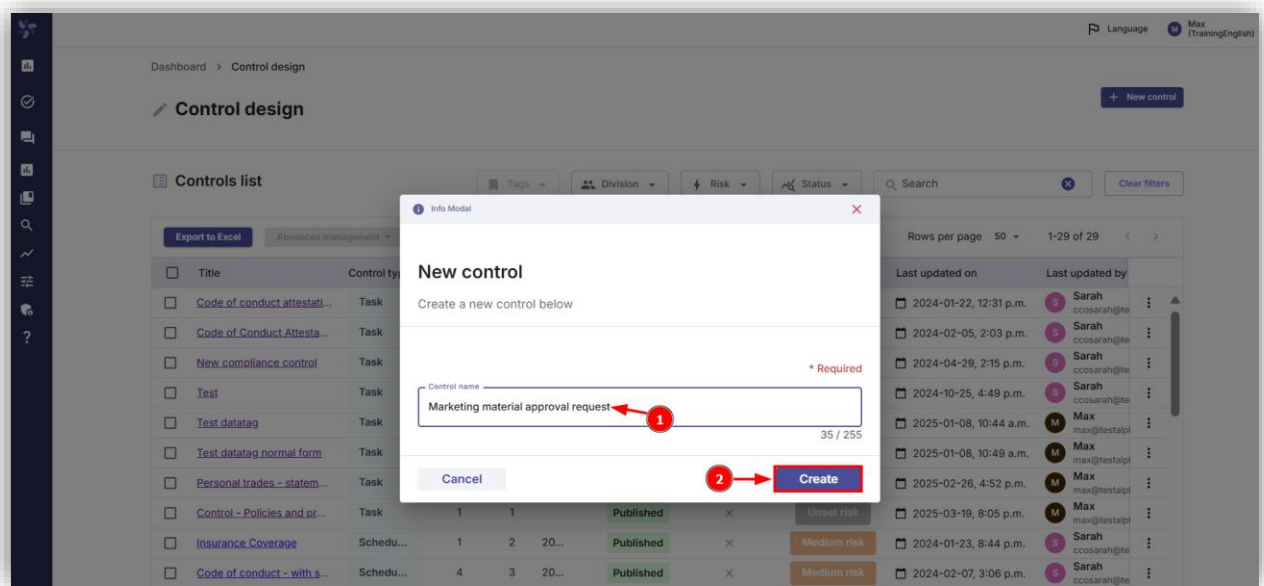


Figure 2: Control creation window.

STEP 3

Click on the icon (+), then select **Request trigger**

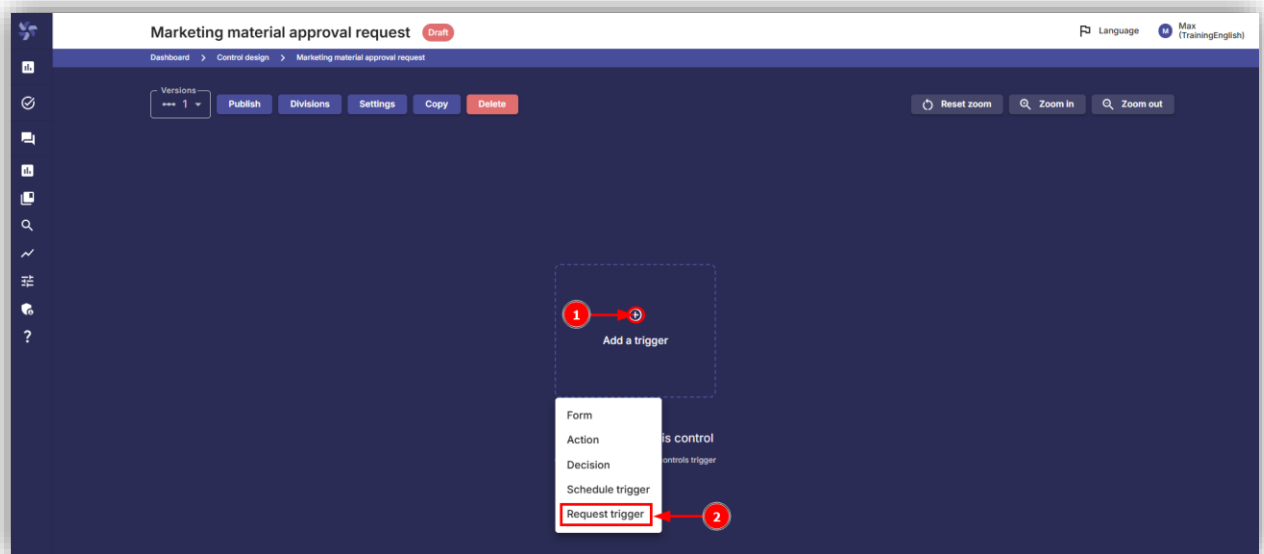


Figure 3: Selecting the Request Trigger.

STEP 4

Selecting the request trigger automatically redirects you to the Assignments window, where you can determine which users, groups and/or roles will be able to make the request. Click on **Save** once all assignments have been made.

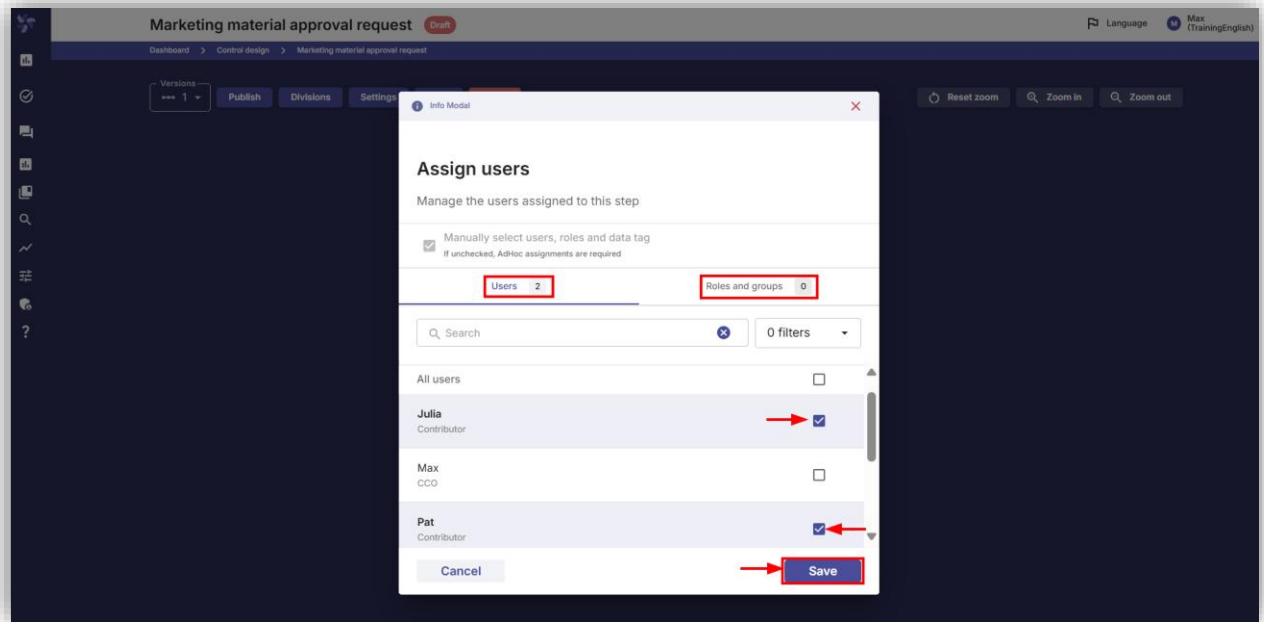
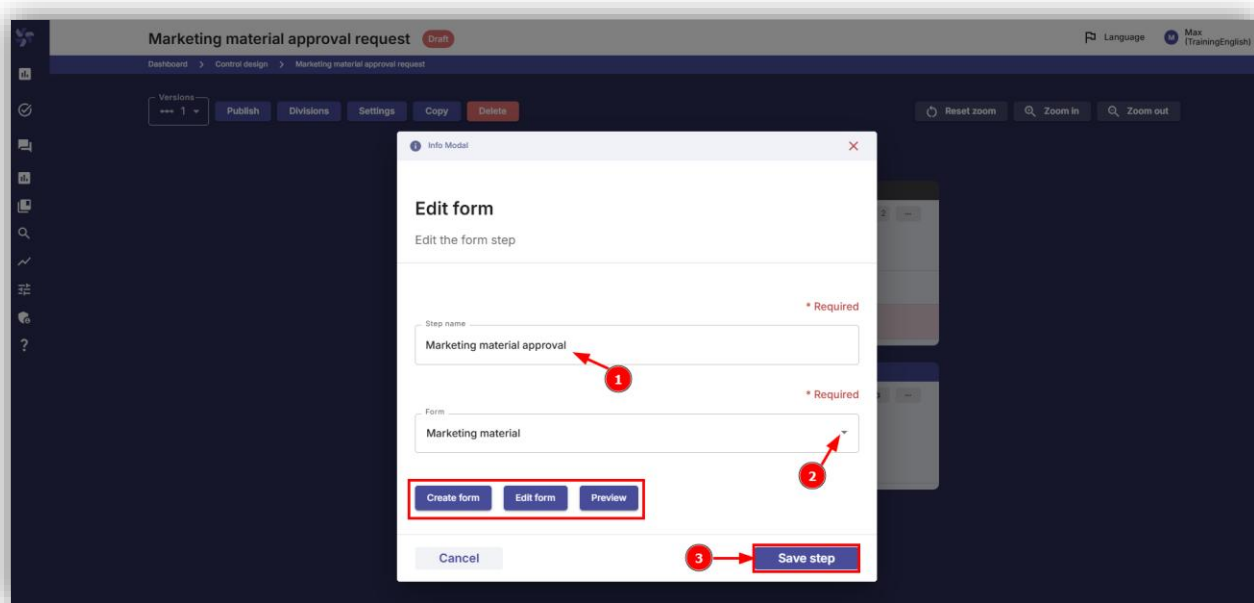
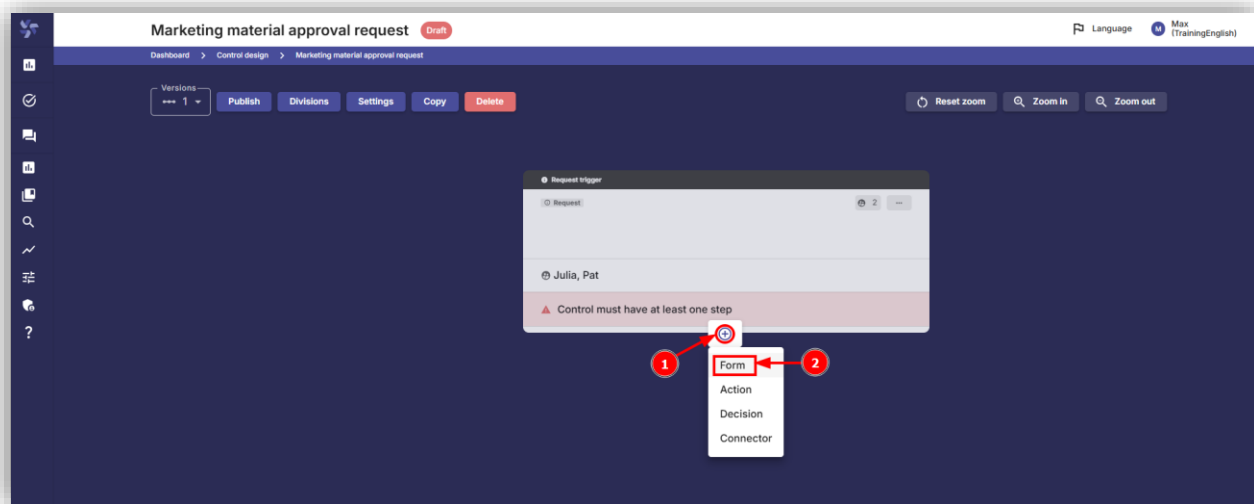


Figure 4: Form assignment selection window.

STEP 5

Click on **(+)**, then select **Form** from the list to add the form step to the form control. Give this step a name, then choose the form to be used for the request from the drop-down menu. You can also click **Create Form** to create a new form, which will redirect you to the form creation page. Additionally, you can **edit** the selected form if needed.



Figures 5 and 6: Adding the form step and selecting the form.

STEP 6

Decision: once you have finished configuring the application form step, click on the (+) icon and select **Decision** to add a decision or approval step.

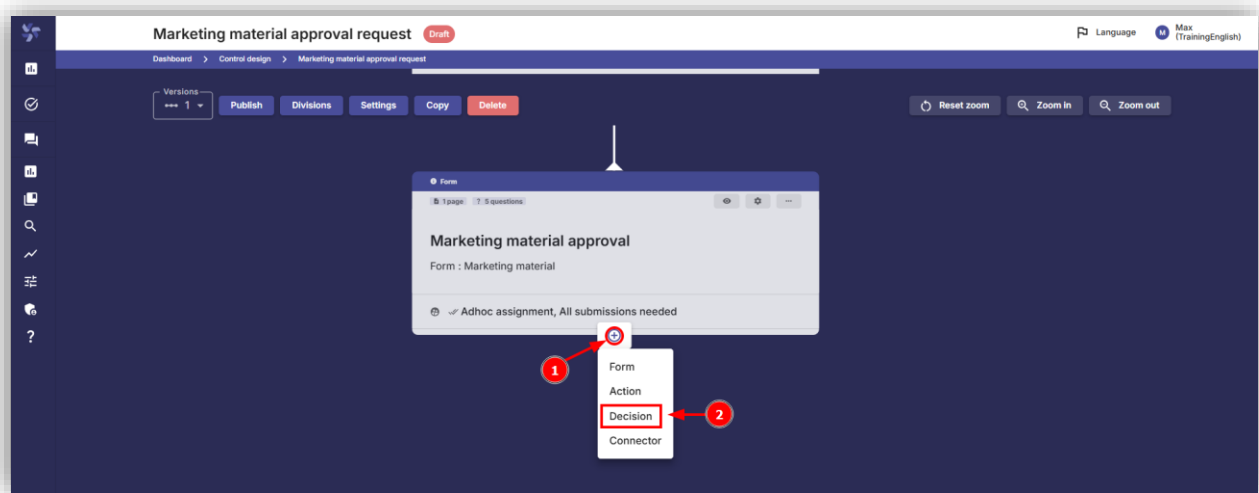


Figure 7: Adding a decision step.

Define the decision step title, then select the **Approve** decision type. You can also add approval instructions.

By default, the options **Decision can be a rejection** and **Rejection will end the control** are enabled, while **Allow approver to approve own request** is disabled for request type controls. These settings can be modified as required; click **Save** once you've made your adjustments.

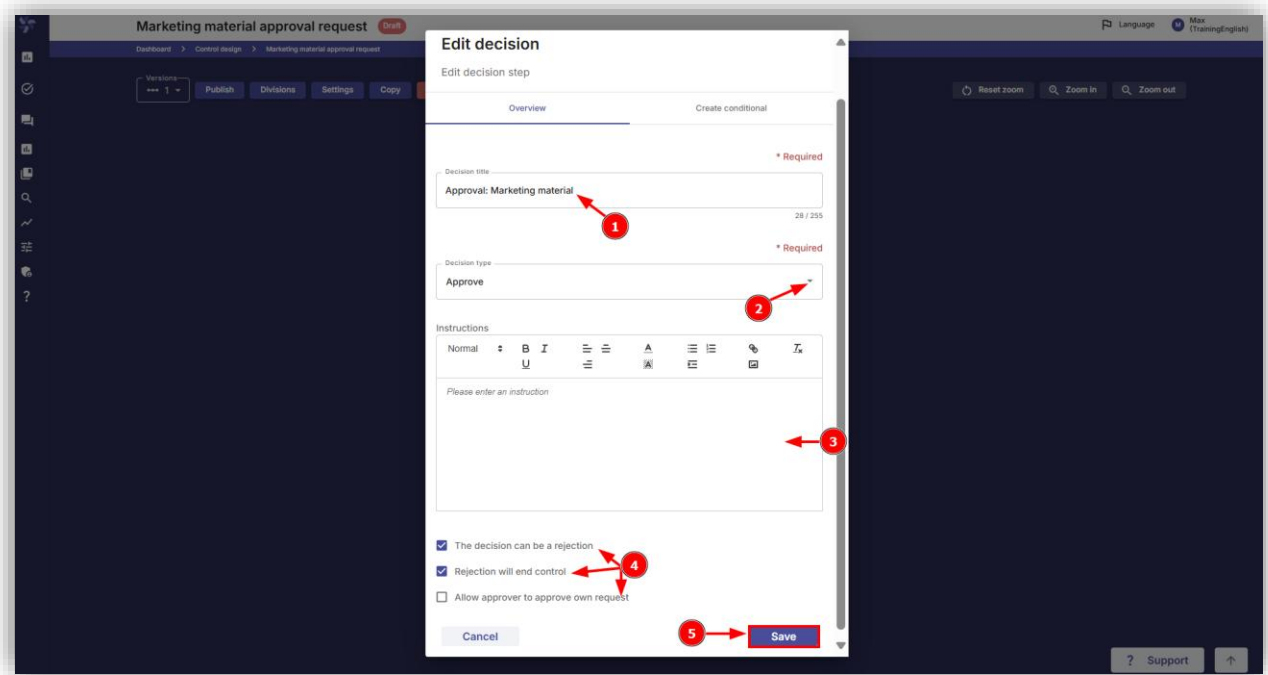


Figure 8: Decision stage parameters window.

STEP 7

Click on the assigned user's icon to define assignments for the decision step. Assignments can be made to individuals, groups, and/or roles. Additionally, you can specify the number of approvals required before proceeding to the next step of the control, if any. Click **Save** once the parameters have been defined.

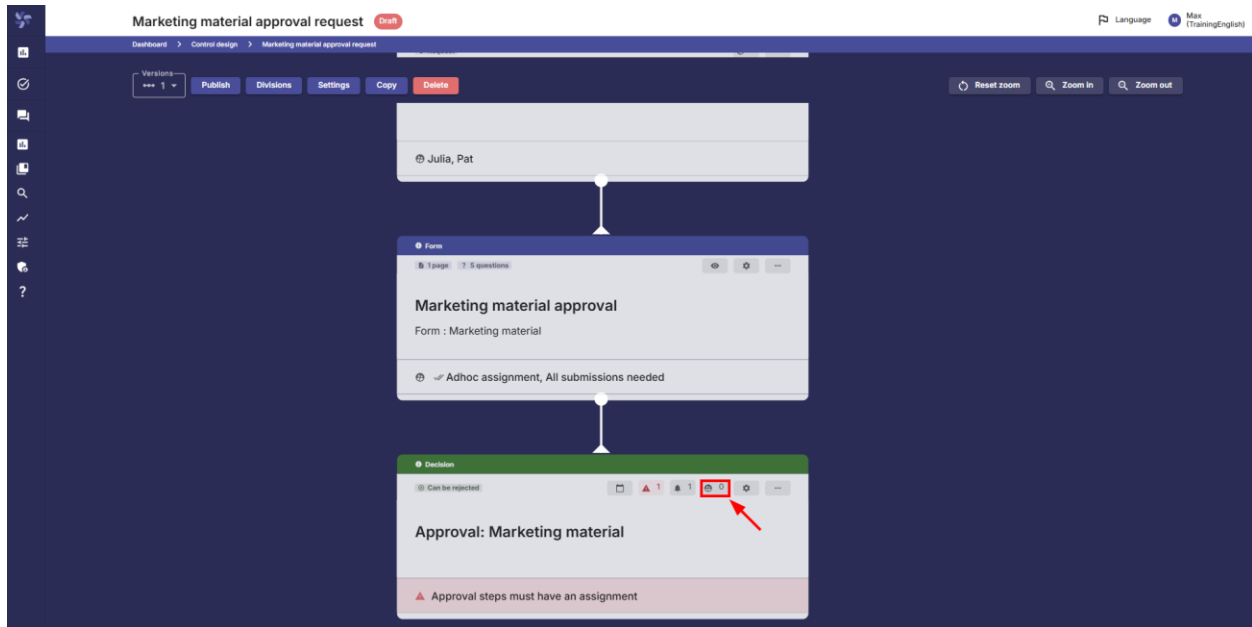


Figure 9: Decision step assignment selection button.

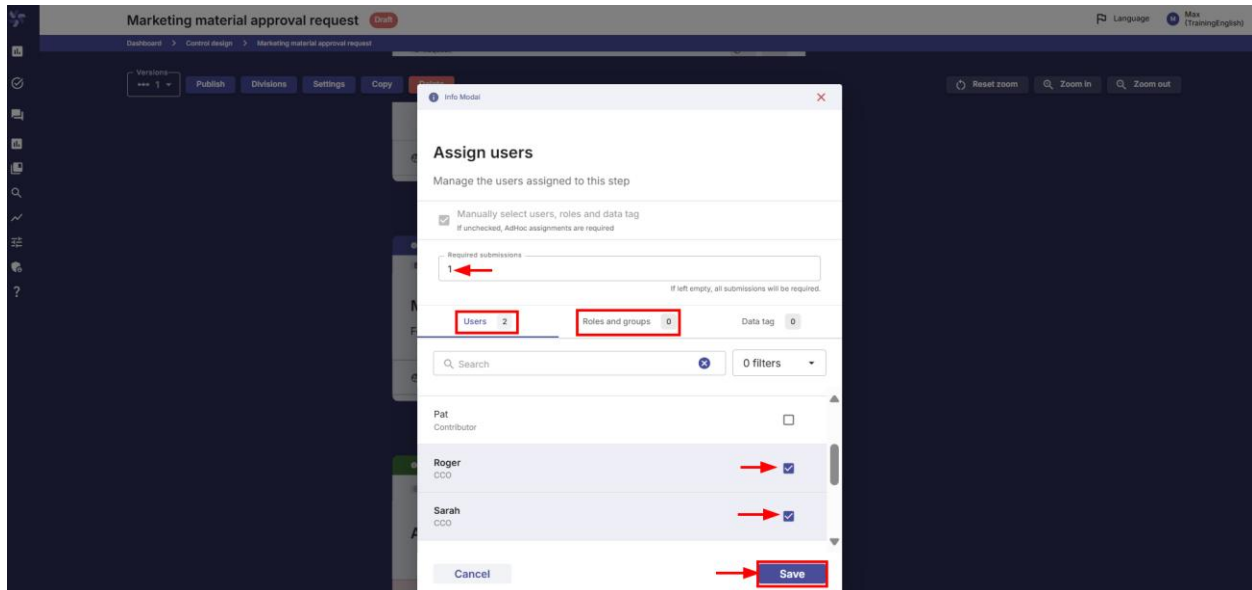


Figure 10: Decision step assignment selection window.

STEP 8

Click on the **Publish** button once the configuration is complete, then click on **Publish control** to make the control active.

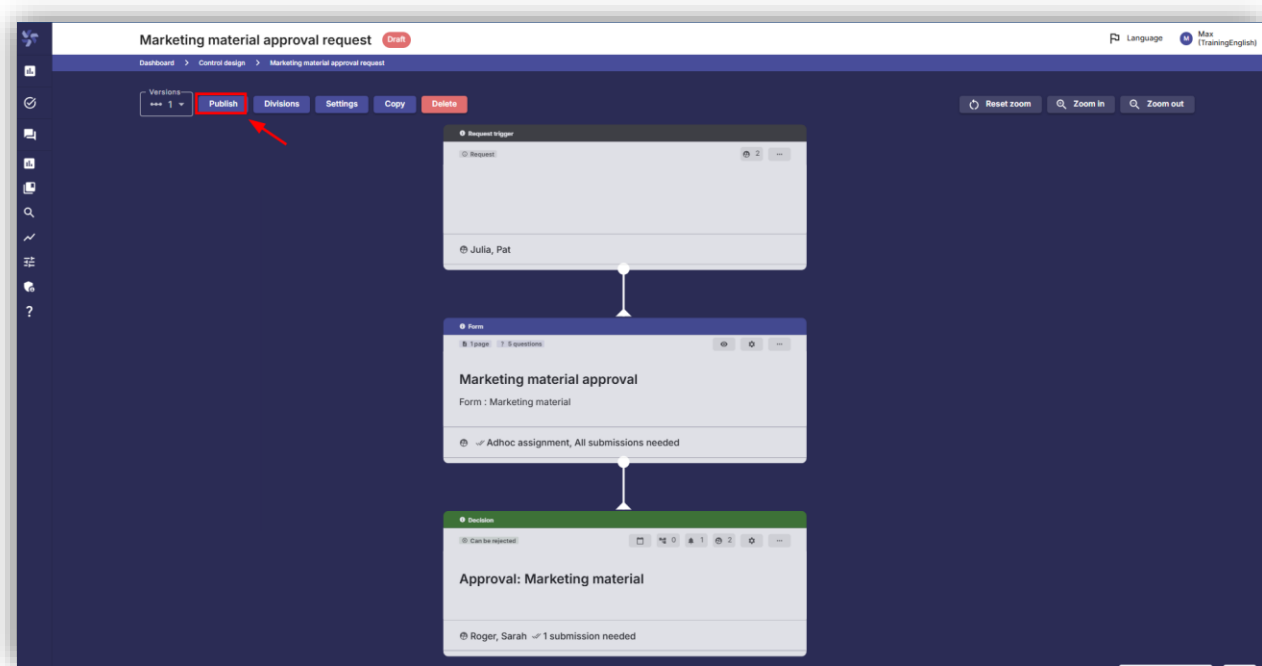


Figure 11: Publish button in configuration.

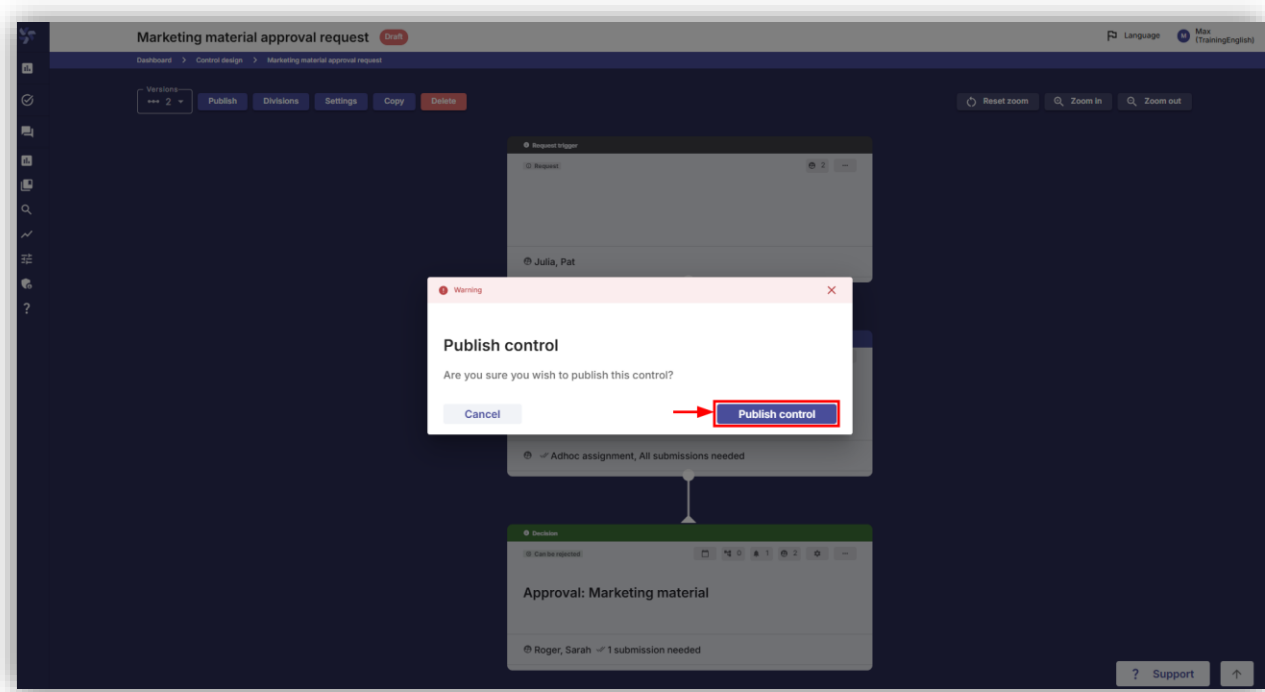


Figure 12: Control activation confirmation window.

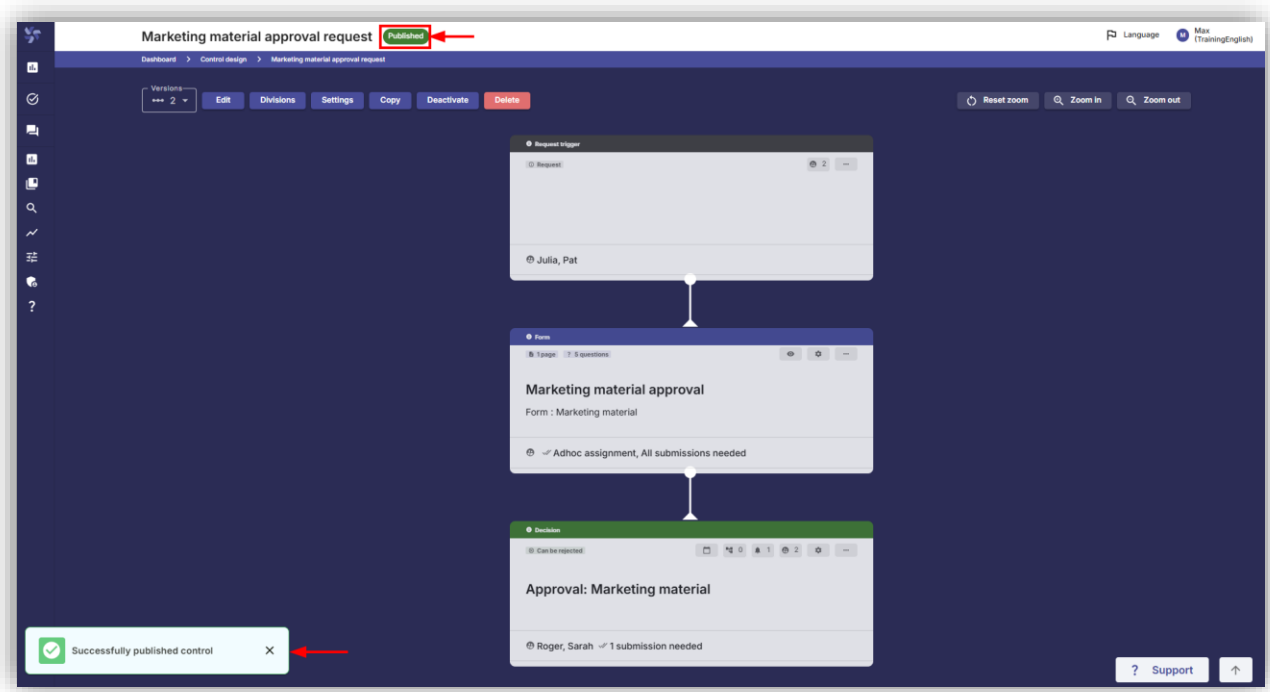


Figure 13: Control page with published status.

NOTES

note that this document is a brief guide; depending on your package, it may be possible to configure several other steps to a control. The AlphaCCO Application Support team will be happy to help you if you require further assistance. Please do not hesitate to contact us at support@alphacco.com