

Configure Approval Workflow

1. Click assets.

VIZOR Donald Nathan's Homepage Modify Log Off

Quick Links

- Assets**
View all asset instances in the library
- Asset Check In / Check Out**
Check out and assign assets to people. Check them in when returned. Use barcode readers for faster processing.
- Request Portal**
Request equipment, access or services that I need
- Employees**
View and manage employee, contractor & student profiles and assets
- Locations**
View and manage locations
- My Approvals & Actions**
Manage my Vizor Approvals & Actions
- Contract Agreements & Purchases**
View and manage all agreements, maintenance contracts, purchases and invoices
- Rules & Policies**

Assets out for repair by type

Asset Type	Count
Chair	2
Desk	1
Projector	2

Assets in storage total

19
ASSETS IN STORAGE

Assets out for repair total

5
ASSETS OUT FOR REPAIR

Requests for my approval

0
APPROVALS

2. A list of your assets will show. Click manage Asset Types. Remember: configuring approvals can only be done at the asset type level

The screenshot displays the VIZOR Assets management interface. At the top, there is a navigation bar with the VIZOR logo and several utility icons: Reports, Inbox, Password, Options, Homepage, and Log Off. Below the navigation bar, a dropdown menu is set to 'Computers', and a search bar contains the text 'Search for an Asset...'. The main area features a table with columns for Name, Manufacturer, Model, CPU, OS Name, IP Address, Allocated to Person, and Asset Type. The table lists various assets, including Chromebooks, Desktops, and a Server. On the right side, a vertical sidebar contains several action buttons: Add Assets, Mass Update, Reassign/Relocate, Scrap, Mark Lost, Request Status, Manage Asset Types (highlighted with an orange border), and Employee Assets. At the bottom of the page, there are navigation arrows and the text 'Page 1 of 1 (44 matches)'.

Name	Manufacturer	Model	CPU	OS Name	IP Address	Allocated to Person	Asset Type
01ca052a-b65f-4ca2-ac --	Acer Chror	--	--	Chrome OS	--	<None>	Chromebook
0253cf0d-4f7d-4b13-9f --	Acer Chror	--	--	Chrome OS	--	<None>	Chromebook
02815b0c-b7c5-4959-4c --	Acer Chror	--	--	Chrome OS	--	<None>	Chromebook
ACCT-COMP-002	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.10	Martin West	Desktop
CBCO00002	--	--	--	--	--	Demo User	Chromebook
CBCO00003	--	--	--	--	--	Jane Rose Daren	Chromebook
CUST-DEMO-001	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Windows Vista	15.0.2.11	<None>	Desktop
CUST-DEMO-003	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.12	Rose Arrington	Desktop
DEV-COMP-001	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.13	Sarah Smith	Desktop
DEV-COMP-003	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.14	John Davis	Desktop
HR-COMP-002	LENOVO	3626AT7	Intel(R) Core(TM) i5 CPU M	Microsoft Windows 7 Enterp	15.0.2.15	Jane Rose Daren	Desktop
Laptop10000	Lenovo	G550	--	--	--	Admin User	Laptop
QA-COMP-002	VMware, Inc.	VMware Vi	Intel(R) Xeon(R) CPU X5690	Microsoft Windows 7 Enterp	15.0.2.16	Donald Nathan	Desktop
QA-COMP-004	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.17	Chris Hubbard	Desktop
SALES-COMP-001	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.18	<None>	Desktop
SALES-COMP-003	LENOVO	7638BV3	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.19	Daniel Ambler	Desktop
SAMPLELAPTOP1	LENOVO	HF98	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.22	Donald Nathan	Laptop
SAMPLELAPTOP2	--	--	Intel(R) Core(TM)2 Duo CPl	Microsoft Windows 7 Enterp	15.0.2.66	Employee User	Laptop
Server	HP	HP-S80-25	Intel Xeon 3.2 GHz	Windows Server 2016	12.21.22.11	Martin West	Server

3. Asset Classes will show first. This is the high-level perspective of your assets. Drill down. In this case, we will choose, computers.

The screenshot shows the VIZOR Asset Types management interface. At the top, there is a navigation bar with the VIZOR logo and several utility icons: Reports, Inbox, Password, Options, Homepage, and Log Off. Below the navigation bar is a search bar labeled "Search for an Asset Type...". The main content area displays a list of asset classes under the heading "(Start) >". The "Computer" asset class is highlighted with an orange box. To the right of the list is a sidebar with several action buttons: "Add New Asset Class", "Add New Asset Type", "Mass Update", "Return to Asset Library", and "Hidden Asset Types". At the bottom of the page, there is a pagination control showing "Page 1 of 1 (11 matches)" and a small grid icon.

Name	Description	Asset Class
Audiovisual Equipment	Projectors, TVs, Whiteboards, Speakers, Audio Mixers	--
Computer	Laptops, Desktops, Servers, Virtual Machines, Chromebooks	--
Consumables	USB Memory Sticks, Keyboards, Mice, Toners, Cabling	--
Document	Signed Agreements, Manuals	--
Email, Internet and Network	Email Accounts, Routers, Switches	--
Furniture	Desks, Chairs, Filing Cabinets	--
Hardware	Printers, Monitors, Photo Copiers	--
Network Share	Networks shares which are required by the business	--
Physical Security	ID Badges, Electronic Key Cards, Keys	--
Services	IT Services	--
Telecom	VoIP Phones, iPhones, Android Phones	--

4. Pick the asset type you want to configure. In this case, we will choose, Desktops.

The screenshot shows the VIZOR Asset Types management interface. At the top, there is a navigation bar with the VIZOR logo and several utility icons: Reports, Inbox, Password, Options, Homepage, and Log Off. Below the navigation bar is a search bar labeled "Search for an Asset Type...". The main content area displays a table of asset types under the breadcrumb "(Start) > Computer >". The table has columns for Name, Description, and Asset Class. The "Desktop" row is highlighted with an orange box. To the right of the table is a sidebar with several action buttons: "Add New Asset Class", "Add New Asset Type", "Mass Update", "Return to Asset Library", and "Hidden Asset Types". At the bottom of the page, there is a pagination control showing "Page 1 of 1 (5 matches)" and a list view icon.

Name	Description	Asset Class		
Chromebook	--	Computer	<input type="checkbox"/>	<input type="checkbox"/>
Chromebook Container	--	Computer	<input type="checkbox"/>	<input type="checkbox"/>
Desktop	--	Computer	<input type="checkbox"/>	<input type="checkbox"/>
Laptop	--	Computer	<input type="checkbox"/>	<input type="checkbox"/>
Server	--	Computer	<input type="checkbox"/>	<input type="checkbox"/>

5. The details of the asset type will pop up. Click the Lifecycle tab

Edit Asset Type: Desktop

Update the information for the asset type. Define here any Actions needed to provision or deprovision the asset Desktop.

History New Email Emails

Overview **Details** **Life Cycle** Actions Purchases Allocation Assets Mapping

Name: Desktop

Manufacturer:

Description:

Responsible:

Asset Will Expire On:

Privacy or Security Sensitive:

Relevant to Data Protection:

Has An Associated Cost?: Yes

Associated Cost: \$ 0.00

Track As: Individual

Visible: Yes

Can Be Requested: Yes

ID: 1

Attachments

Comments:

* This color indicates a required field

Back Next OK Save Close

6. This is where the lifecycle of the asset type pops up. You can click on any part of the lifecycle to configure it. In this case, click approval within the graphic or in the drop-down menu right below it.

The screenshot shows a web application window titled "Edit Asset Type: Desktop". The window has a header with a close button and three icons: History, New Email, and Emails. Below the header is a navigation bar with tabs: Overview, Details, Life Cycle (selected), Actions, Purchases, Allocation, Assets, and Mapping. The main content area contains a lifecycle diagram with stages: Request, Approval, Fulfillment, Provisioning, Use, and De-provisioning. The "Approval" stage is highlighted with an orange border. Below the diagram is a dropdown menu labeled "Showing Life Cycle Stage:" with "Approval" selected. The configuration section below the dropdown is divided into two columns. The left column has "Approval Needed For:" set to "Manual Requests", and three levels of approvers: "Level 1 Approvers:" set to "<Employee Manager>", "Level 2 Approvers:", and "Level 3 Approvers:". The right column has "Minimum Approvers Required:" set to an empty field, and three "No Approval Needed Level" options (1, 2, 3) set to empty fields. At the bottom left, a note says "* This color indicates a required field". At the bottom right, there are buttons for "Back", "Next", "OK", "Save", and "Close".

Edit Asset Type: Desktop
Update the information for the asset type. Define here any Actions needed to provision or deprovision the asset Desktop.

History New Email Emails

Overview Details **Life Cycle** Actions Purchases Allocation Assets Mapping

Click on the diagram to configure the life cycle stages.

Request Approval Fulfillment Provisioning Use De-provisioning

Showing Life Cycle Stage: Approval

Approval Needed For: Manual Requests

Level 1 Approvers: <Employee Manager>

Level 2 Approvers:

Level 3 Approvers:

Minimum Approvers Required:

No Approval Needed Level 1:

No Approval Needed Level 2:

No Approval Needed Level 3:

* This color indicates a required field

Back Next OK Save Close

7. On the same page, fill out the fields to configure the workflow of the approval. By clicking in the field, a list of options will pop up.

The screenshot shows a web application interface for editing an asset type. The title is "Edit Asset Type: Desktop" and the subtitle is "Update the information for the asset type. Define here any Actions needed to provision or deprovision the asset Desktop." The interface has a navigation bar with tabs: Overview, Details, Life Cycle (selected), Actions, Purchases, Allocation, Assets, and Mapping. Below the navigation bar, there is a diagram of the life cycle stages: Request, Approval, Fulfillment, Provisioning, Use, and De-provisioning. The "Approval" stage is highlighted in blue, and a dropdown menu below it shows "Showing Life Cycle Stage: Approval". The configuration fields for the Approval stage are as follows:

Approval Needed For:	<input type="text" value="Manual Requests"/>	Minimum Approvers Required:	<input type="text"/>
Level 1 Approvers:	<input type="text" value="<Employee Manager>"/>	No Approval Needed Level 1:	<input type="text"/>
Level 2 Approvers:	<input type="text"/>	No Approval Needed Level 2:	<input type="text"/>
Level 3 Approvers:	<input type="text"/>	No Approval Needed Level 3:	<input type="text"/>

At the bottom of the page, there is a note: "* This color indicates a required field" and a set of buttons: Back, Next, OK, Save, and Close.

8. For example, you can set as many approvers as you need. You can even put the number of approvers needed for each level. By default, VIZOR comes with 3 approval levels. You will have to contain the technical team to request more.