

Panel Settings and Maintenance

A how to guide for maintaining Panels in Approval Donkey including required responses and deadlines etc.

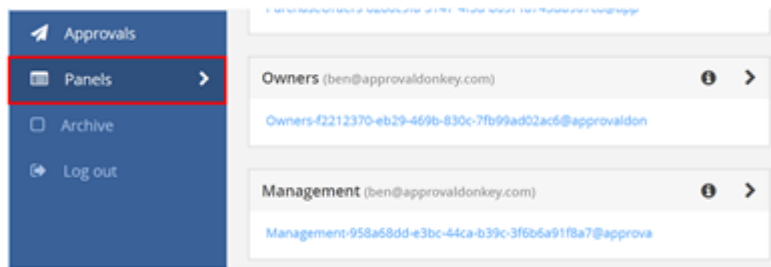
Prerequisites

You are required to have set-up your own customised Panel to maintain, see the '**Adding New Panel**' guide for step by step instructions on how to do this.

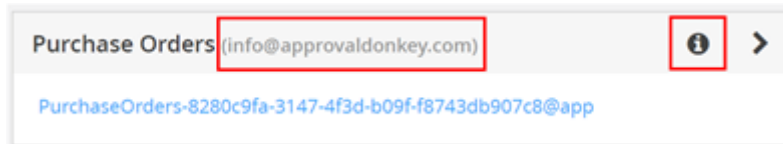
Step by Step – Maintaining a Panels Settings

Note: Only Panel owners can maintain a specific Panel.

Once logged in go to the 'Panels' Dashboard



Select the 'i' icon to access the Panels settings.




Note: The Panel Owners email address is highlighted, if this is yours then you have amend rights for the Panel.


The Panel settings screen allows you to maintain how each of your Panel behaves:

- **Set Required Responses:** Set a designated number of responses required to approve (or decline) a request. For example, you may have a Panel with 5 members and any of these members can approve or decline requests, you can set the number of required responses to 2 meaning only 2 out of the 5 members are required to change the request status

- **Auto Approve Requests from me:** This setting allows any requests sent from the Panel owner to be auto approved, meaning only additional Panel members are required to approve or decline the request (Note: Responses can be changed anytime).
- **Allow Approvals from other systems:** If you want to allow other systems and people to send requests to the Panel then select 'Yes'. If you want to keep it a closed Panel i.e. only Panel members can send requests then select 'No'
- **Email Status Updates to Non-Members:** Use this setting to turn on/off non-member status updates for when they for example email a request to a Panels Email
- **Default Reminder/Deadline after:** You can set automated notifications and deadlines to trigger at certain times after an initial request is sent.
- If the reminder time is triggered the initial request is re-sent to any Panel members who have not responded.
- If the deadline time is triggered the request status will change from Pending to Overdue.
- **Archive the Panel:** By selecting 'Yes' here and saving it removes this Panel and all associated requests from your main Dashboard view.
- **Remove Panel:** Like archiving a Panel however removing a Panel is permanent and cannot be undone, also completely removes all associated requests.

Set Required Responses: 

Auto Approve requests from me? Yes No 

Allow Requests from Non-Members and Systems Yes No 

Email Status Updates to Non-Members Pending Approved Declined Overdue 

Default reminder after: Days Hours Activate 

Default deadline after: Days Hours Activate 

Archive this Panel (Also archive's all associated requests)? Yes No 

 Save and Close

 Remove Panel 

Remember to **'Save and Close'** any changes.