


How To Use Projxs Approvals Process the Approval



Overview.

The Approval Process page gives you the tools you need to register your approval or other action. The links on email alerts and notifications that request your approval come directly to this page for your action. You can see the approver list and view the notes entered by those that have approved before you. You can simply mark the approval as Approved and be done or you can take another action. You can add a Note to any action you take on the approval.

approval action - facilities portal, assignments

Approval: Budget Understandings 

Notes:

Approver	Approved
Facilities Manager 	<input checked="" type="checkbox"/>
John Johnson 	<input type="checkbox"/>

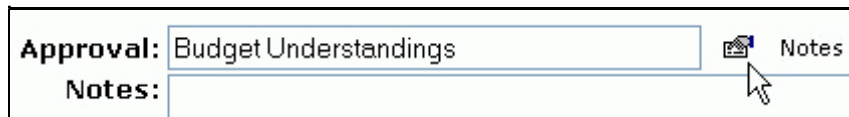
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Using the approval processing icons.

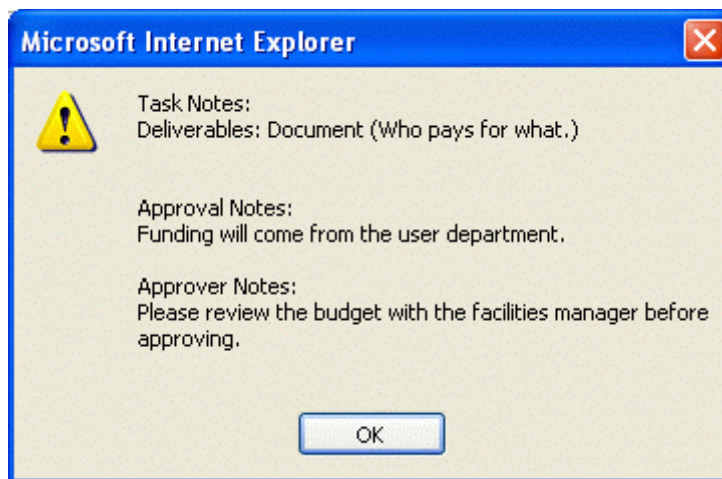
There is an overall Notes icon associated with the approval, plus an update link and a Notes icon associated with each approver. This helps give you information on the approval and the associated task that may help you process the approval easily.

Approval Notes

The link associated with the approval name shows all of the task, approval and approver notes in a pop-up alert. This is the same information you will see as you drill down into to the approval and task, so if you don't need to make changes, it will save you time.

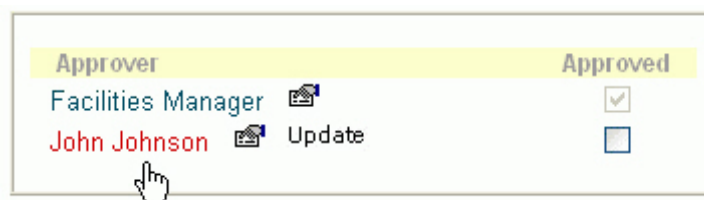


Close the note to view other items or process your approval.



Update Approver

The link on each approver name takes you to an approver update dialog.



With sufficient permissions you can change the approver note, release the approval or send a reminder to the approver.

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Approver Notes

You can show the notes for each approver using the "Notes" icon. This will allow you to easily see what prior approvers noted about their approval.



Approver	Approved
Facilities Manager  View	<input checked="" type="checkbox"/>
John Johnson 	<input type="checkbox"/>

Close the note window to view the notes of another approver.



Viewing approver status.

The check box shown on the approval process page is informational only. It shows the who has approved, who is released to approve and who is awaiting your action before the approval is released to them for approval. In this example, the Facilities Manager has approved, and John Johnson is able to process his approval.

Approver	Approved
Facilities Manager 	<input checked="" type="checkbox"/>
John Johnson  Process	<input type="checkbox"/>

Entering your approver note.

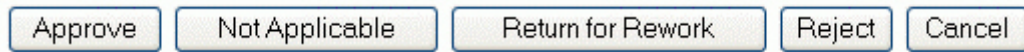
The Notes box is for you to enter your notes relative to your approval. It will be appended to other notes that may have been posted previously.

Notes:

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Completing your approval action.

Once you have reviewed the approval information necessary to take action and entered your approval note, you can register the your action on the approval.



Approve. The Approve button will complete your approval. Succeeding approvers may be released to register their approvals, or the associated task may be released for completion, if all necessary approvals have been obtained.

Not Applicable. Selecting Not Applicable will also complete your approval, but register your approval as not applying to you or your organization. An example of where this applies is where conceptual drawings are sent for approval from all potential groups, such as Environmental, Safety, Security, Validation, Finance, etc. If the design has no Environmental impact, for example, the approver may choose to approve the item as Not Applicable as opposed to Approve.

Return for Rework. The item is not approved at this point. The approver Note is recorded and the approval request remains active pending satisfaction of your issues.

Reject. The item is not approved. Any approver Note is recorded. The approval request can be processed at a later time, if your issues are resolved, however for all intents and purposes, this stops the project. No further approvals or tasks will be automatically released.

Cancel. Returns you to the page from which you came.

More Help.

If you would like additional information, please contact us at:

Email: support@projxs.com

Phone: 888-324-7931 (toll free in the United States)
203-364-8701