


How To Use Projxs Approvals Update Approvals

Overview.

An approval is set up as part of the associated task. You can change the values in the approval to meet your requirements to approve a task. If no approvers are assigned, then the approval does not need to be obtained and that task can be completed. Otherwise the task waits for approval by all approvers until it can be completed.

approvals - budget understandings

[Add Approvers](#) 







Due Date: **Approved:**

Approval: **Financial Approval:**

Type:

Amount:

Notes:

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

Using links.

The Add Approvers link will open the Add Approvers dialog in order to add an approval group or individual approver to the current approval.



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Entering approval values.

Due Date & Approval. The due date and approval are view-only fields that are the same as the associated task.

Due Date:	<input type="text" value="7/2/2006"/>
Approval:	<input type="text" value="Budget Understandings"/>

Type. The Type field cannot be changed once an approver has approved. Otherwise, select the Type from the pull down list to associate the approval with a project, drawing, audit, budget, etc.

Type:

Amount. You can enter any amount you like in the Amount field. It is just informational, unless the Financial Approval check box is checked. If the approval is a Financial Approval, then an approver with financial authority greater than or equal to the Amount must approve it. Otherwise, the approval will not be considered approved, even if all approvers have registered approved.

Amount:

Notes. The Notes you enter here will be shown to all approvers. They can be changed at any time during the approval cycle.

Notes:

Approved. The Approved box shows weather the approval process is complete or still in progress. It is only informational and cannot be changed. Approval by all approvers and approval satisfaction of the amount determine when the Approved flag is checked.

Approved:







Financial Approval. The Financial Approval box is extremely important to the approval process. If it is not checked, the approval requirements do not check the approver financial approval limits against the approval amount. However, if it is checked, then the approval must be approved by at least one approver with sufficient financial approval authority. Further, approvers may be deleted once approval for the amount has been obtained, if the Allow Financial Delete flag is checked for the approver.

Financial Approval:

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





Using the approver list.

The approver list shows the current status of approval flow. In the example below, the Facilities Manager has approved, while John Johnson has either unapproved, returned or rejected the approval. It is now waiting his further action. You will most likely use this for reference if you are updating the approval, however the links in the list are active for you to perform other actions.

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

Update Approver




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

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

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

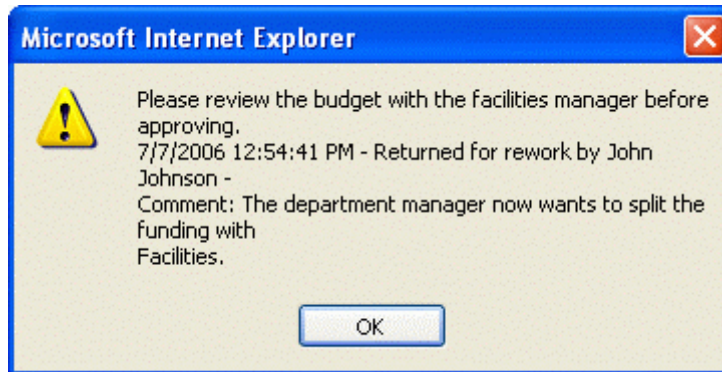
View Approver Notes

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, or in the example below you can see that John Johnson returned the approval for rework.

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

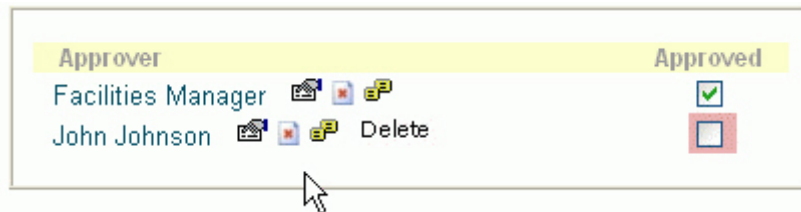
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Close the note window to view the notes of another approver.

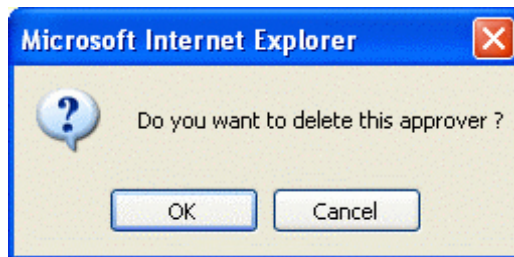


Delete Approver

Normally there will be no delete icon, as the permissions to delete an approval are limited. If you have authority to delete an approver, you can click on the icon to delete an approver.

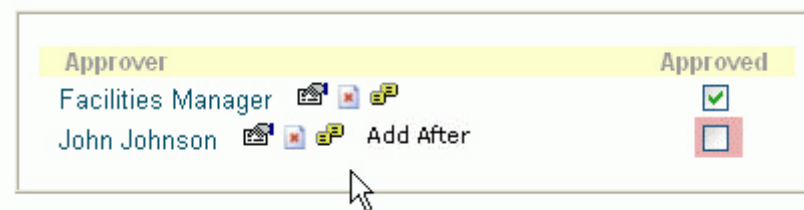


A confirmation is displayed for you to OK or Cancel.



Add After the Approver

If you wish to add an approver, the Add After icon will open the Add Approver dialog with pre-populated fields.



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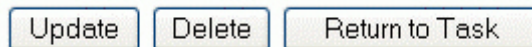
Process the Approval.

The check box allows you to process or reset an approval. Approval is limited to the assigned approver or a Projxs administrator. The ability to unapprove is limited to those responsible for requesting the approval or a Projxs Administrator.



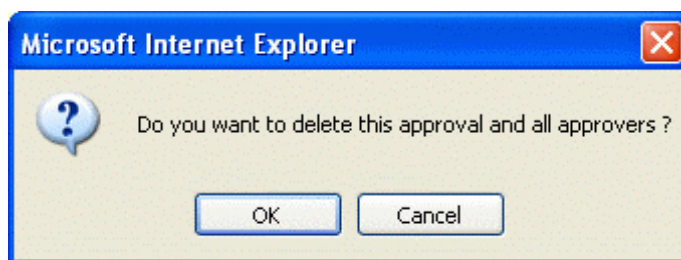
Updating the Approval

Once you have changed the values and settings of the approval, you can complete the update.



Update. The Update button saves the changes you made.

Delete. Normally there will be no delete button, as the permissions to delete an approval should be limited. When you hit the Delete button, a confirmation is displayed for you to OK or Cancel. Upon completion you will be returned to the associated Task page.



Return to Task. Returns you to the associated Task page without update.

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