

# How To Use Projxs Approvals Update an Approver

## Overview.

The approver update page contains the status and controls for the approver. The controls are normally set based upon values in an approval template. In addition, notes specific to the approver can be added for them to see when they process the approval.

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

## Update Permissions.

Generally, you will have permission to update the approver information, if you created or are assigned the associated task, created the approval or are a Projxs administrator.

## 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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### Updating approver values.

If you have permission, certain approver fields are available for you to update.

**Due Date & Approval.** The due date and approval are view-only fields that are retrieved from the associated task. If they are changed in the task, they will change in the approval, as well.

<b>Due Date:</b>	7/2/2006
<b>Approval:</b>	Budget Understandings

**Approver.** To change the approver, select another name from the approval list. If the approver is part of an approval template and automatically selected, you may still change the approver. However, any subsequent change of the associated functional lead in the project team will automatically change the approver to that newly specified lead.

<b>Approver:</b>	John Johnson
<b>Placement:</b>	After Facilities Manager

**Placement.** Select a new placement to move the approver to a different position in the approval order. You may also need to change the value for Auto Release to also change the release flow.

<b>Placement:</b>	After Facilities Manager
<b>Notes:</b>	After Facilities Manager

**Notes.** The Approver Notes give guidance to or share specific information with the approver. Whereas the Approval Notes are intended for all approvers. Make any changes to the Approver Notes here.

<b>Notes:</b>	Please review the budget with the facilities manager before approving.
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Check Boxes. The Check Boxes are both informational and operational.

<b>Approved:</b> <input type="checkbox"/>
<b>Auto Release:</b> <input type="checkbox"/>
<b>Send Reminder:</b> <input type="checkbox"/>
<b>Allow Financial Delete:</b> <input type="checkbox"/>

**Approved:** If the approver has approved the item, this box is checked. If you are the approver or the approval requester, you can check or uncheck the Approved box and the Approved or Unapprove page will be displayed for your action. When an approval has been previously unapproved, returned or rejected, a red box surrounds the check box.

<b>Approved:</b> <input type="checkbox"/>
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**Auto Release:** The Auto Release box is checked if the approver can process their approval simultaneously with the preceding approver. You can also leave the check box unchecked to require that all previous approvers process their approval before this approver is asked to register their approval.

**Send Reminder:** This check box will normally be off. If you want Projxs Alerts to send this approver a reminder email, check this box hit update. The box will remain checked until the email has been sent.

The screenshot shows an email interface with the following details:

- From:** Projxs Approvals
- Date:** Saturday, July 08, 2006 7:35 AM
- To:** John Johnson
- Subject:** Approval awaiting your action.

The main content of the email includes:

- Project:** 1000: Flamingo Building
- Approval:** Budget Understandings
- Approver:** John Johnson
- Due Date:** 7/2/2006
- Approval Notes:** Funding will come from the user department.
- Approver Notes:** Please review the budget with the facilities manager before approving.  
7/7/2006 12:54:41 PM - Returned for rework by John Johnson -  
Comment: The department manager now wants to split the funding with Facilities.


At the bottom of the email content is a button labeled "Process the Approval".

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**Allow Financial Delete:** Normally all approvers are required to approve. However, you may set up a financial approval template where some approvers, that have not yet approved, may be automatically deleted once sufficient financial authority has been obtained. This feature is normally used to limit the items sent to senior management. It may also be used to send a financial approval to two comparable approvers, and once one approves, the other will be deleted. Check this box to allow this approver to be eligible for automatic deletion.







### Using the approver list icons.

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.

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 approval or send a reminder to the approver.

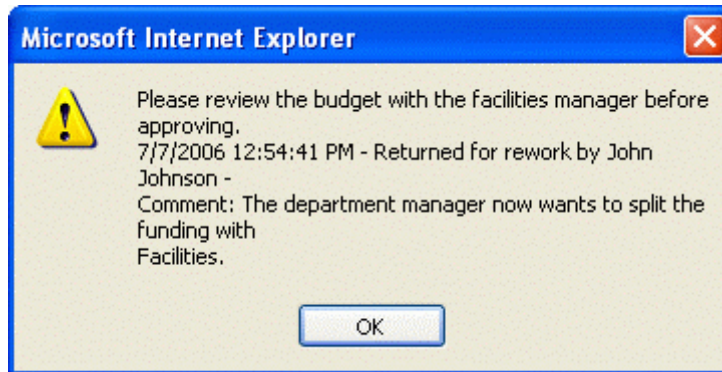
### View Approver Notes

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 this case their Return for Rework.

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

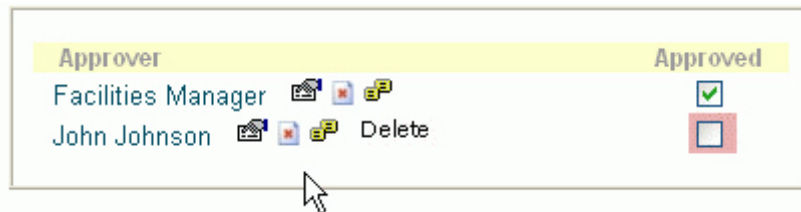
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Close the note window to view the notes of another approver.

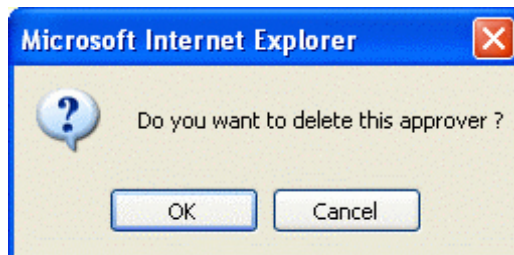


### Delete Approver

Normally there will be no delete icon, as the permissions to delete an approval should be limited. Hit the icon to delete an approver.

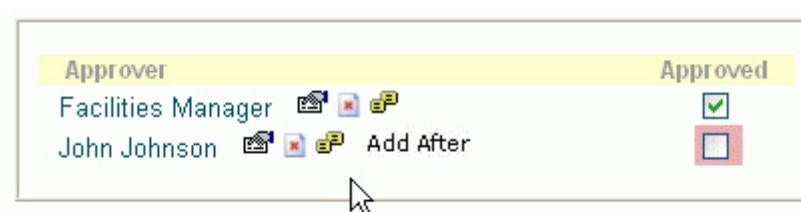


A confirmation is displayed for you to OK or Cancel.



### 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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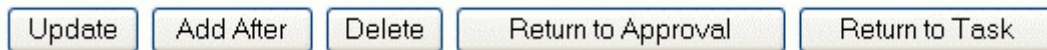
Process the Approval.

The check box allows you to process or reset an approval. When you check a box, a new page will open for you to approve or unapprove, indicate the approval is not applicable, return or reject the approval. You can also enter a note about your action.



### Completing the Update

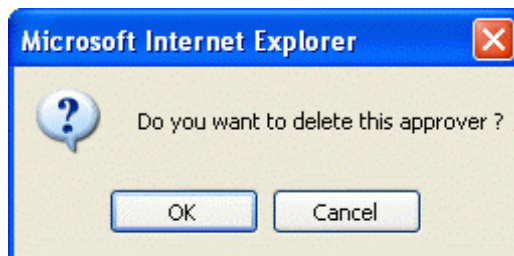
Once you have changed values and settings or obtained the information you need, you can complete the update.



Update. The Update button saves the changes you made.

Add After. 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.

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 Approval page.



Return to Approval. Returns you to the Approval page without update.

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

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### More Help

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

Email: [support@projxs.com](mailto:support@projxs.com)

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