



ProjectVIEW^{ERP}

Cost Monitoring Solution

Approvals

This section describes how users can approve/reject certain actions throughout ProjectVIEW. It does not include the approval creation and setup, which is described in the “11 02 Administrator - Users and Approvals” manual.

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1 Introduction

Due to the sensitive nature of the data and operations within ProjectVIEW, it is recommended for a chain of approvals to be setup in order for its most important functions to be completed.

A chain of approvals defines the hierarchy followed when an action needs to be approved before it takes place. An example is approving an order in the Orders submodule of the Purchasing module. To finalize an order, the chain of approvals could be as follows:

Purchasing team → Purchasing Manager → Department Head

An approval chain consists of multiple levels as shown in the example above. The approval process starts from the lowest level and moves up to the next when a user approves the action.

The user whose approval is requested can be set up in multiple ways, allowing for the following options:

- ✓ Approval to be given by anyone with a specific title
- ✓ Approval to be given by anyone with a specific role
- ✓ Approval to be given by a specific user

Note

The person with the highest level in the chain of approvals can single-handedly approve or reject the **entire** chain. However, everyone else in the chain can only approve their own step. For more information, please contact your administrators.

2 Pending Approvals Screen

To make it easier for a user to respond to approval requests, the system displays the “*Pending Approvals*” screen after logging in:

Company	Branch Code	Branch Description	Project Code	Project Description	Sub Project Code	Sub Project Des.	Budget Code	Budget Number	Budget Description	Commitment No
01	ALPHA COMPANYY	TD	0001	Demo			01-0	0		
01	ALPHA COMPANYY	01	001	ALPHA COMPANYY	PROJECT-001	BRT-STHA3	BRT-STHA3	42005-0	42005-0	01/10/17
01	ALPHA COMPANYY	01	001	ALPHA COMPANYY	PROJECT-001	CBS-3	CBS-3	81700-0	81700-0	04/10/17
01	ALPHA COMPANYY	01	001	ALPHA COMPANYY	PROJECT-001	CBS-3	CBS-3	81700-1	81700-1	04/10/17
01	ALPHA COMPANYY	01	007	ALPHA COMPANYY	Star Tower		007-0	0	Star BOQ Budget	01/06/18
01	ALPHA COMPANYY	01	008	ALPHA COMPANYY	NESMA DEMO		008-0	0	Nesma Demo BOQ Budget	01/01/18
01	ALPHA COMPANYY	01	009	ALPHA COMPANYY	NESMA DEMO		009-1	1		01/01/18
01	ALPHA COMPANYY	01	100	ALPHA COMPANYY	Project 100		100-0	0	BOQ Budget 100	01/12/18
01	ALPHA COMPANYY	01	115	ALPHA COMPANYY	Project 115		115-0	0	BOQ Budget	01/03/19
01	ALPHA COMPANYY	01	127487	ALPHA COMPANYY	Project 127487		127487-0	0	BOQ Budget 127487	28/10/19
01	ALPHA COMPANYY	01	200	ALPHA COMPANYY	Project 200		200-0	0	BOQ Budget 200	08/12/18
01	ALPHA COMPANYY	01	222	ALPHA COMPANYY	Project 222		222-0	0	BOQ Budget	01/04/20
01	ALPHA COMPANYY	01	225	ALPHA COMPANYY	Project 225		225-0	0	BOQ Budget 225	
01	ALPHA COMPANYY	01	255	ALPHA COMPANYY	Project 255		255-0	0	BOQ Budget	01/02/19
01	ALPHA COMPANYY	01	270	ALPHA COMPANYY	Project 270		270-0	0	BOQ 270	01/06/20
01	ALPHA COMPANYY	01	272	ALPHA COMPANYY	Project 272		272-0	0	BOQ Budget	15/06/20
01	ALPHA COMPANYY	01	272	ALPHA COMPANYY	Project 272		272-IE	1	Indirect Expenses	01/05/20
01	ALPHA COMPANYY	01	299	ALPHA COMPANYY	Project 299		299-0	0	BOQ 299-0	01/04/19
01	ALPHA COMPANYY	01	300	ALPHA COMPANYY	Project 300		300-0	0	Project Tower Budget	01/04/19
01	ALPHA COMPANYY	01	321	ALPHA COMPANYY	Project Hussein Villa		321-0	0		01/08/18
01	ALPHA COMPANYY	01	331	ALPHA COMPANYY	Project 331		331-0	0	Budget 331	
01	ALPHA COMPANYY	01	333	ALPHA COMPANYY	Tornado Tower		333-0	0		01/06/19
01	ALPHA COMPANYY	01	339	ALPHA COMPANYY	Cinema Project -I		339-0	0	BOQ Budget for 339	01/07/19
01	ALPHA COMPANYY	01	339	ALPHA COMPANYY	Cinema Project -I		339-BOQ	0	Budget 339	TEST100
01	ALPHA COMPANYY	01	339	ALPHA COMPANYY	Cinema Project -I		339-0	0	BOQ Budget	01/06/20
01	ALPHA COMPANYY	01	339	ALPHA COMPANYY	Cinema Project -I		339-BOQ-0	0	BOQ Budget	
01	ALPHA COMPANYY	01	345	ALPHA COMPANYY	Project 345		345-0	0	Budget BOQ of 345	01/06/20
01	ALPHA COMPANYY	01	377	ALPHA COMPANYY	Project 377		377-1	1	Cost Budget 377	01/08/19
01	ALPHA COMPANYY	01	388	ALPHA COMPANYY	Project 388		388-0	0	BOQ Budget of Proj. 388	01/06/20
01	ALPHA COMPANYY	01	442	ALPHA COMPANYY	Project 442		442-0	0	BOQ Budget 442	01/07/20
01	ALPHA COMPANYY	01	444	ALPHA COMPANYY	Demo-Link-Est-AKTION		444-0	0		12/06/18

This grid displays all the pending approvals for the user.

The pending approvals are listed in multiple tabs, depending on the module and section from which they were issued.

To view and approve/reject a request, the user has to select the appropriate category and double-click the request.

If this screen is not visible, the user can find it by navigating to:

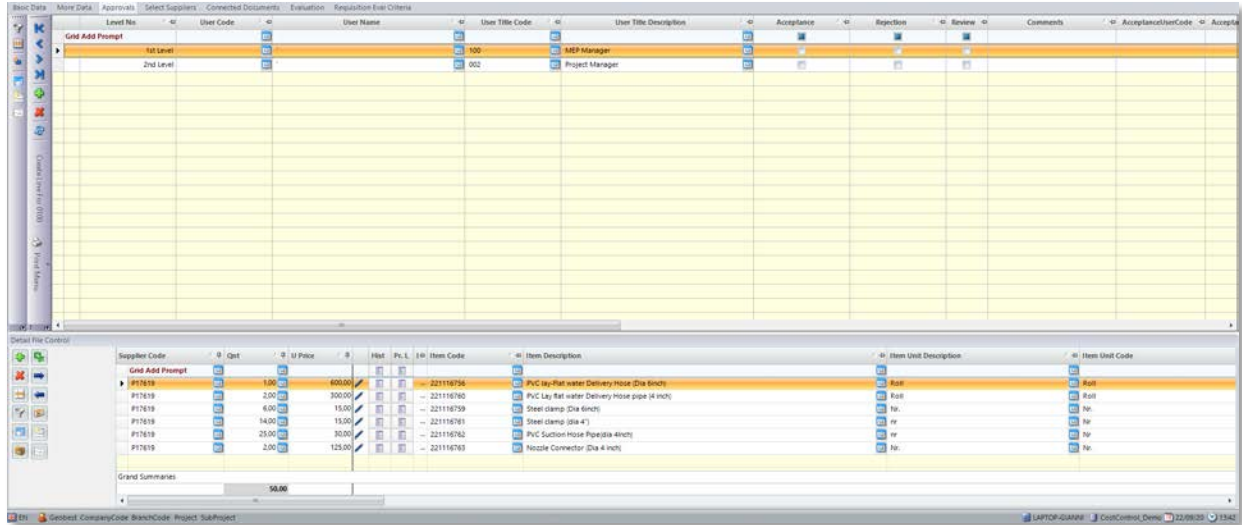
“Others” > “General Works” > “User Multi Acceptance Grid”

Note

More information on approvals can be found in “00 03 Approvals” manual.

3 Approval Screen

An example of an approval screen is the following:



The grid lists all the levels of approvals set up for this action. It is sorted by the level number by default, i.e. the hierarchy of the approvals from lowest to highest.

A user can approve or reject an action in one of these cases:

- ✓ A level has the user's title
- ✓ A level has the user's role
- ✓ A level has the user's code

The user has now three options:

Approve action:

By approving, the user accepts the action and requests an approval from the next user in the chain. To approve the action, the user must tick the "Acceptance" check box in their line. An email will be sent to the next user down the approval chain who will continue the approval process as necessary.

Reject action

By rejecting, the user does not accept the action. To reject the action, the user must tick the "Rejection" check box in their line. An email will be sent to all the previous users up the approval chain notifying them of the rejection. It is also advisable for a comment to be entered explaining the rejection cause.

Request a review

The final option is for the user to add comments and tick the “Review” check box in their line. An email will be sent to the previous user up the approval chain notifying them that some changes/additions are needed in order for the approval to proceed to the next level. The latter will have to amend their action and approve it once again so that the reviewer can be notified once again.

Note

If a user has multiple roles or titles assigned to them and two consecutive approval levels require the user’s different roles, approving one level will simultaneously approve the next one. For example:

User A has roles “Document Controller” and “Purchasing Team” assigned to them.

User B has roles “Document Controller” and “Purchasing Manager” assigned to them.

The following approval chain has been set up:

Level	Role
1	Site Engineer
2	Document Controller
3	Purchasing Team
4	Purchasing Manager

When the approval process reaches level 2, both user A and user B will be able to approve. If user A approves, the approval chain will directly move to level 4 because user A can also approve level 3. However, if user B approves, the approval chain will only move to level 3, because user B cannot approve level 3.



In case of any queries or support issues, please
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