



Idea Elan

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2018

ANU Customer

Approval

Comprehensive Online Solution for
Lab and Core Facility Management

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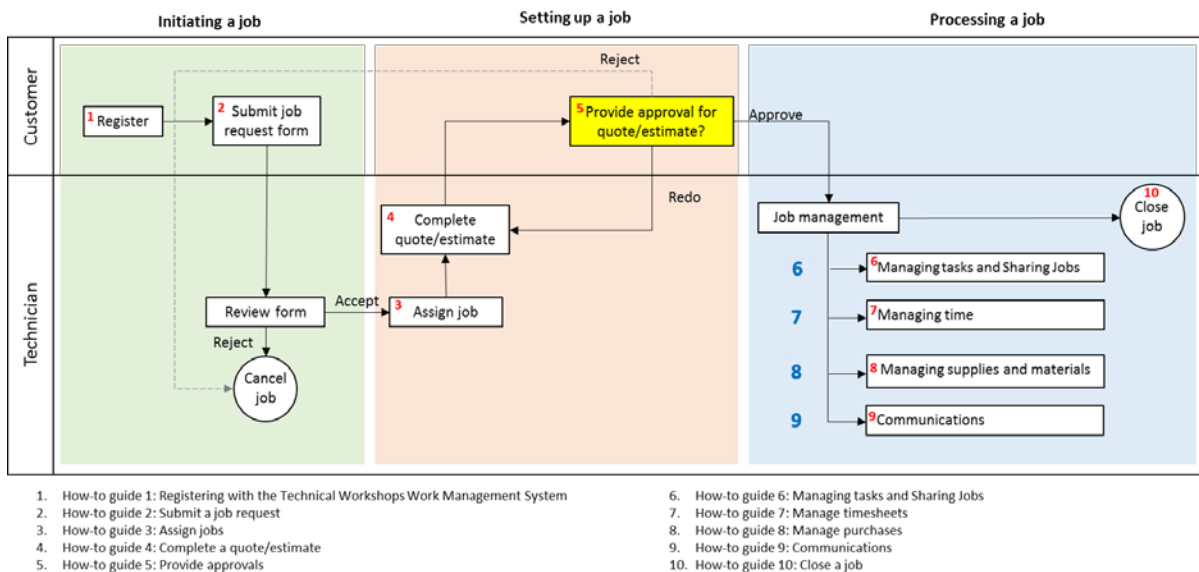
How to Provide Approvals

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how to provide approvals to Technical Workshops Work Management System. We have produced a series of 'how-to guides' that can be accessed from the System webpage, which can be found here:

<https://services.anu.edu.au/information-technology/software-systems/technical-workshop-work-management-system>

Please see the workflow chart below for more information on the system workflow and the associated 'how-to guide' for each step.

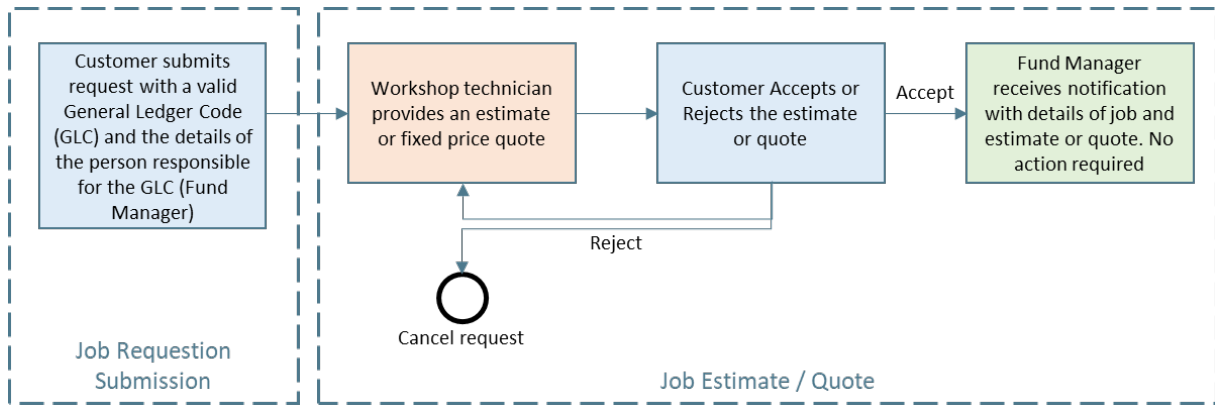


Approval Process:

There is a standardised process and workflow that customers submitting requests to the Technical Workshops will need to follow. The new request and approval process will require customers to provide a valid General Ledger Code (GLC) as well as the name of the 'Fund Manager' of that GLC i.e. the person responsible for the GLC.

In line with the University's commitment to enhance user experience and business processes, we have removed the requirement for Fund Managers to provide approval before work commences on the job request. In all cases, the customer who submitted the request will be required to provide their approval to the estimate or quoted costs, but the Fund Manager will receive an email notification of the costs only. The Fund Manager will not be required to provide their approval, but they will be able to intervene if they so wish. This will minimise the turnaround time for job approvals, and reduce the effort required by Fund Managers.

The new process is detailed in the following workflow:



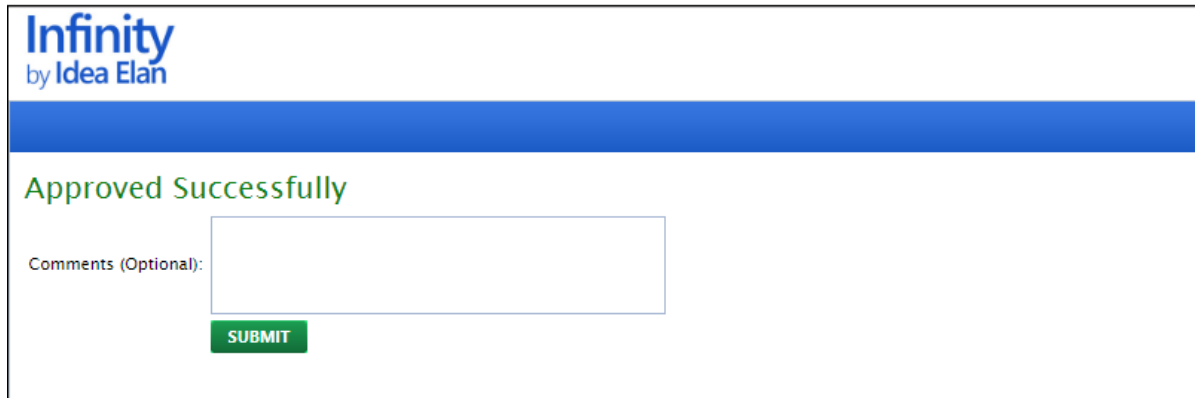
Step 1:

All approval requests will be received via an email notification. You can click on 'Approve' or 'Reject'

- The Technical Workshop will require customer approval for all job quotes and estimates
- You may also be asked to approve other areas related to the job such as scope or design documents, or any large purchase requests.
- You will receive an email from the workshop with quoted/estimated amount, comments and attachments if any.
- To provide your approval click on 'Approve' button or to reject click on 'Reject' button.

Step 2:

Add any comments with approval or rejection



The screenshot shows a pop-up window with the 'Infinity by Idea Elan' logo at the top left. Below the logo is a blue horizontal bar. The main content area features the text 'Approved Successfully' in green. Underneath, there is a label 'Comments (Optional):' followed by a white text input box. A green 'SUBMIT' button is positioned below the input box.



The screenshot shows a pop-up window with the 'Infinity by Idea Elan' logo at the top left. Below the logo is a blue horizontal bar. The main content area features the text 'Rejected Successfully' in red. Underneath, there is a label 'Comments (Optional):' followed by a white text input box. A green 'SUBMIT' button is positioned below the input box.

- A Pop-up window will appear when the approve or reject button is selected in the email notification
- Add any comment with your approval or rejection in the comments box
- Click on Submit to finish.