



EVANTAGE SOLUTIONS SDN BHD

Computerized Maintenance Management System (CMMS)

USER MANUAL
(Approval Level)

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DOCUMENT CONTROL

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Revision No	Revision Date	By	Description of Changes
1.0	11/06/2024	Najmi	First Version of User Manual – Approval Level

Scenario

A company have a policy of having multiple level or requirements in approving the MR before technician may take the items to complete a certain work order. In this syllabus, we will guide on the different between My Level, My Limit and Any Level in the CMMS Core.

1. My Level Approval MR

What it's for

The system is primarily utilized within hierarchical approval processes for technician-generated MR. For instance, the Team Leader serves as the initial approving authority, while the Manager acts as the final approver. Each authority level has a specific approval threshold; the Team Leader can approve MRs up to RM 1,000, whereas the Manager can approve MRs up to RM 10,000.

Open Loop:

When a technician submits an MR costing approximately RM 500, the approval by the Team Leader is sufficient, as it falls within their approval limit. Therefore, it does not require further approval from the Manager.

Close Loop:

When a technician submits an MR costing approximately RM 500, the approval by the Team Leader is sufficient, as it falls within their approval limit. However, it does require approval from the Manager as well.

Setup My Level Approval MR

- 1.1 On the left panel of the system, click on **People > Employee**

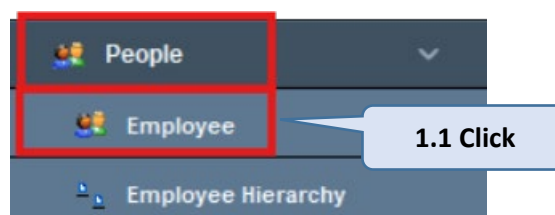


Figure 1.1

- 1.2 Assuming this person is the Team Leader of the maintenance team. Click on **Edit** button to edit the information.

The screenshot shows a table with columns: Employee ID, Login ID, User Group, Privilege Template, Name, Status, and Supervisor ID. The row for 'ADMIN1' is highlighted in blue. A red box highlights the 'Edit' button in the top toolbar. A callout box labeled '1.2 Click' points to the 'Edit' button.

Employee ID	Login ID	User Group	Privilege Template	Name	Status	Supervisor ID
DEMO	DEMO	SYSAD	ADMIN	ESSB	Manager	ACT
ADMIN	ADMIN	SYSAD	STOREKEEPER	ADMIN		ACT
TEST	TEST2	SYSAD	STOREKEEPER	TEST		ACT
ADMIN1	ADMIN1	SYSAD		AZAM BIN AZIM	Team Leader	ACT

Figure 1.2

- 1.3 On the detail subtab, tick on the **MR Approver / Limit** to access the MR Approval subtab.

The screenshot shows the user detail form for 'ADMIN1'. The 'Detail' subtab is selected. A red box highlights the 'MR Approver / Limit' checkbox in the 'MR Approver / Limit' section. A callout box labeled '1.3 Tick' points to the checkbox.

Employee ID: ADMIN1, Name: AZAM BIN AZIM, Title: Team Leader, Status: ACT, Pay Period: , User Group: SYSAD, SYSTEM ADMIN, Date of Birth: 00/00/0000, Date of Hire: 00/00/0000, Pay Rate: .00, Sex: Female, Marital Status: Single, Dashboard Access: Gauge Dashboard.

MR Approver / Limit	Value	Have Master File?
MR Approver / Limit:	.00	YES
WO Budget Approver / Limit:	.00	YES
PR Approver / Global Limit:	.00	NO

Figure 1.3

- 1.4 On the MR Approval subtab, click on **Add** button to add a new line of MR Approval.

- 1.5 Fill in the mandatory field coloured in red:

Field	Value	Have Master File?
Cost Centre	: ESSB	YES
Approval Limit	: 1,000	NO

(Note: Master file are control by System Admin).

- 1.6 Click on **Save** button to save the employee information.

1.6 Click

1.5 Insert

1.4 Click

Figure 1.4

- 1.7 To check either the MR Approval is open loop or close loop, on the left panel of the system, click on **Master Files Settings > System Default Setting**.

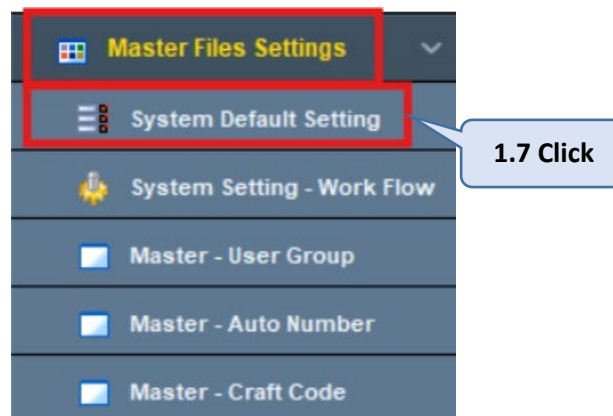


Figure 1.5

- 1.8 Click on **Settings** subtab to open the settings view.
- 1.9 Untick the **MR Approval Closed Loop** to set to the Open Loop function.
Tick the **MR Approval Closed Loop** to set to the Close Loop function
- 1.10 Click on **Save** button to save the settings.

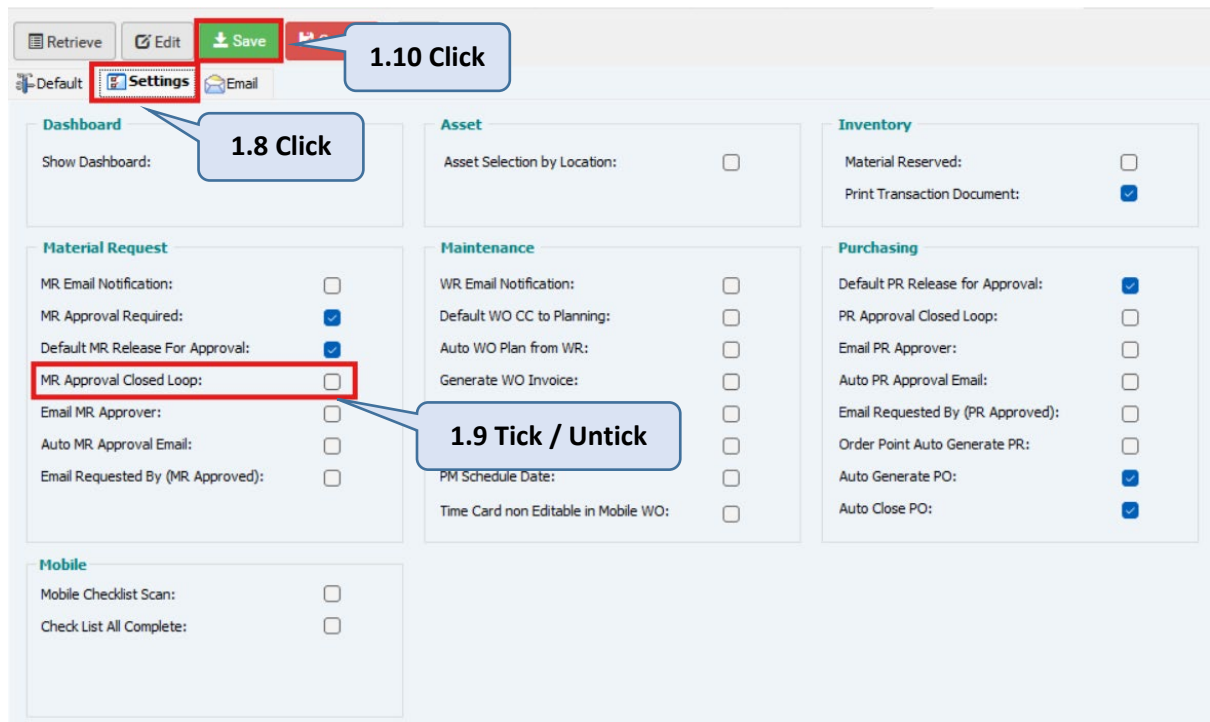


Figure 1.6

- 1.11 To set the MR Approval Level, on the left panel of the system, click on **Master Files Settings > System Setting – Work Flow**.

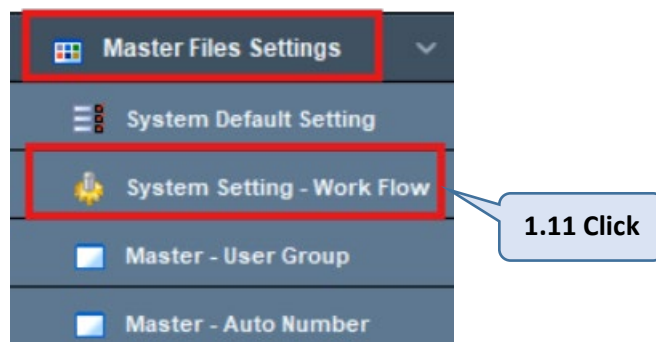


Figure 1.7

- 1.12 Click on **MR Approval List (Cost Center)** to open the view.
- 1.13 Assuming that the ADMIN is the Manager and Azam is the Team Leader. Tick both as the approver and the level will auto assigning on which level the approver going to be based on the limit being set on step 1.5 above.
- 1.14 Click on **Save** button to save the following configuration.

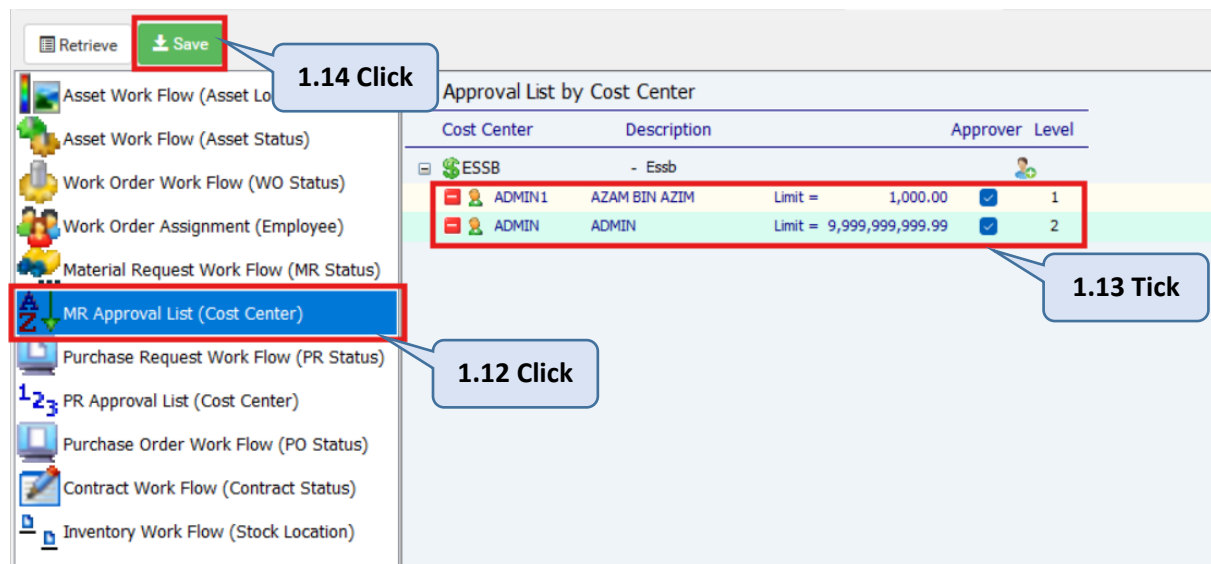


Figure 1.8

- 1.15 To check the setting has been applied, on the left panel of the system, click on **Maintenance > MR Approval**.

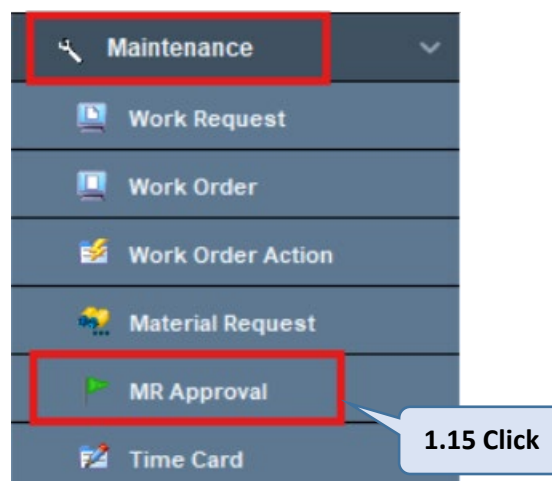


Figure 1.9

- 1.16 In the MR Approval view, click on the dropdown button and choose **1. Awaiting My Approval (My Level)**.

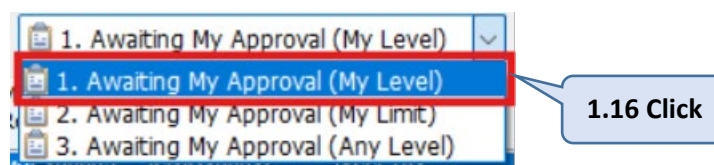
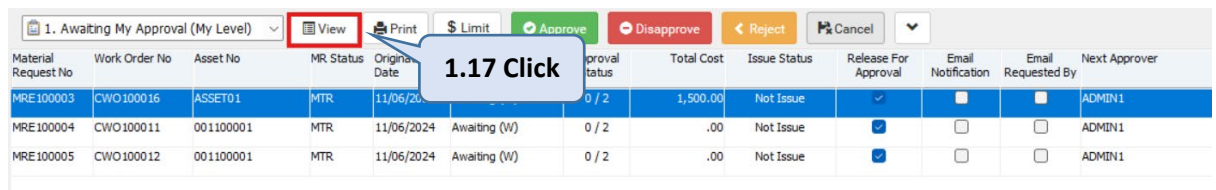


Figure 1.10

- 1.17 The result will show all the MR that need to be approve on your level and click on **View** button to view the MR information.



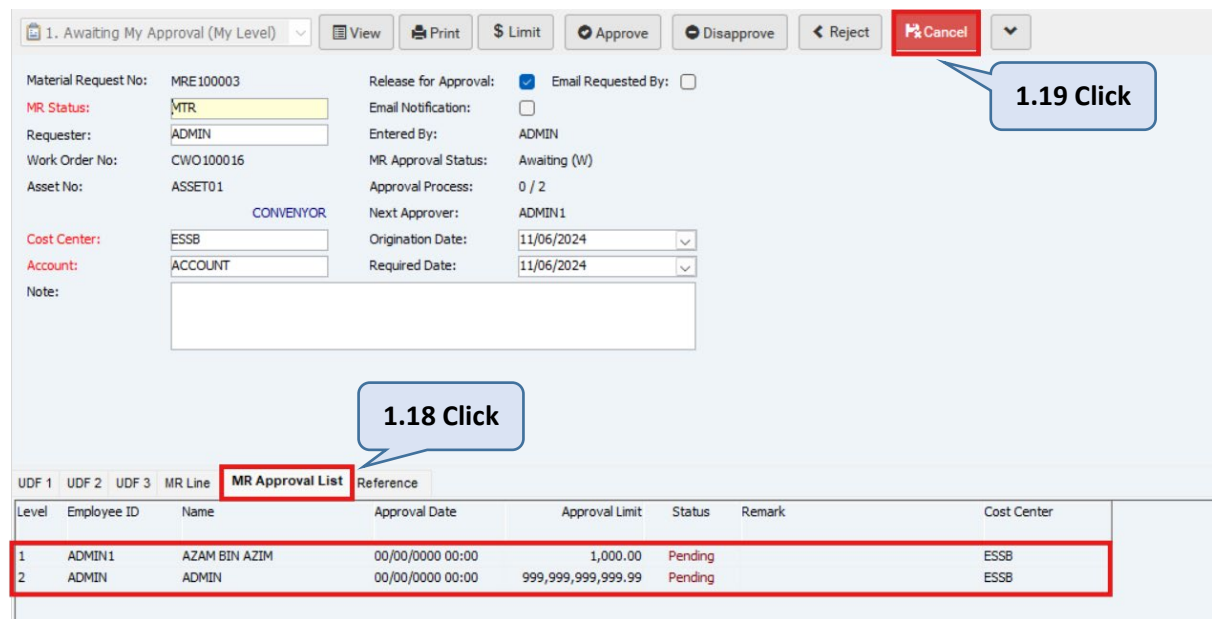
1.17 Click

Material Request No	Work Order No	Asset No	MR Status	Origins Date	Approval status	Total Cost	Issue Status	Release For Approval	Email Notification	Email Requested By	Next Approver
MRE100003	CWO100016	ASSET01	MTR	11/06/2024	0 / 2	1,500.00	Not Issue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ADMIN1
MRE100004	CWO100011	001100001	MTR	11/06/2024	Awaiting (W)	.00	Not Issue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ADMIN1
MRE100005	CWO100012	001100001	MTR	11/06/2024	Awaiting (W)	.00	Not Issue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ADMIN1

Figure 1.11

- 1.18 Click on **MR Approval List** subtab and it will show the Approval list for this MR.

- 1.19 Click on **Cancel** button to back to the MR Approval page.



1.19 Click

1.18 Click

Material Request No: MRE100003
 MR Status: MTR
 Requester: ADMIN
 Work Order No: CWO100016
 Asset No: ASSET01
 Cost Center: ESSB
 Account: ACCOUNT
 Note:

Release for Approval: ☒ Email Requested By: ☐
 Email Notification: ☐
 Entered By: ADMIN
 MR Approval Status: Awaiting (W)
 Approval Process: 0 / 2
 Next Approver: ADMIN1
 Origination Date: 11/06/2024
 Required Date: 11/06/2024

Level	Employee ID	Name	Approval Date	Approval Limit	Status	Remark	Cost Center
1	ADMIN1	AZAM BIN AZIM	00/00/0000 00:00	1,000.00	Pending		ESSB
2	ADMIN	ADMIN	00/00/0000 00:00	999,999,999,999.99	Pending		ESSB

Figure 1.12

2. My Limit Approval MR

What it's for

The organization has assigned one person to be the approval of all the MR created by the technician. For instance, a maintenance clerk has been chosen to handle the job of approving MR and able to approve any MR regarding the prices of the item.

Setup My Limit Approval MR

- 2.1 On the left panel of the system, click on **People > Employee**



Figure 2.1

- 2.2 Assuming this person is the maintenance clerk of the maintenance team. Click on **Edit** button to edit the information.

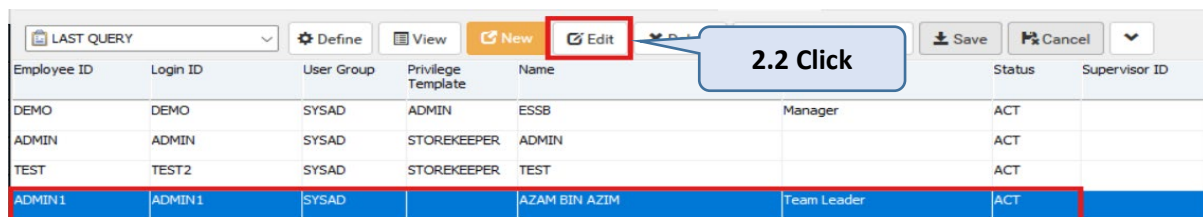


Figure 2.2

- 2.3 On the detail subtab, tick on the **MR Approver / Limit** to access the MR Approval subtab and enter the limit:

Column	Value
MR Approver / Limit	999,999,999.99

The value of the limit should be the highest due to the only person to approve the MR for all material request raised by the technician.

- 2.4 Click on **Save** button to save the limit.

The screenshot shows a user profile form with various fields and a table. A red box highlights the 'Save' button in the top right, with a callout '2.4 Click'. Another red box highlights the 'MR Approver / Limit' field, which contains a blue checkmark and the value '999,999,999.99', with a callout '2.3 Tick & Insert'. The form includes fields for Employee ID, Status, Pay Period, User Group, Name, Title, Login ID, Privilege Template, Dashboard Access, Sex, Marital Status, Date of Birth, Date of Hire, Pay Rate, Contact No, Emergency Name, Emergency Phone, and Remarks. A table on the right shows performance levels and their corresponding ranges.

5	Significant Above Expectation	21 - 25
4	Above Expectation	16 - 20
3	Meet Expectation	11 - 15
2	Below Expectation	6 - 10
1	Significant Below Expectation	1 - 5

Figure 2.3

2.5 To check the setting has been applied, on the left panel of the system, click on **Maintenance > MR Approval**.

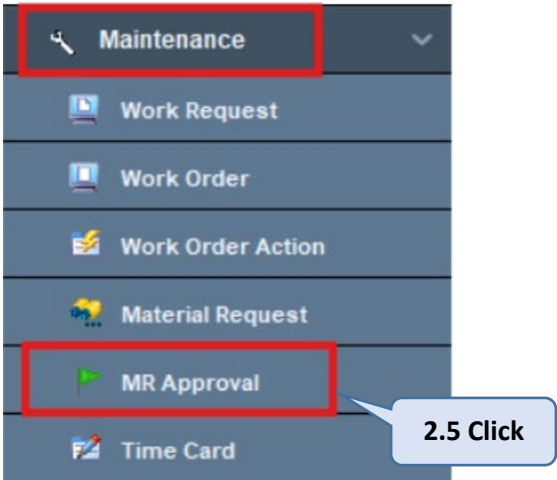


Figure 2.4

2.6 In the MR Approval view, click on the dropdown button and choose **2. Awaiting My Approval (My Limit)**.

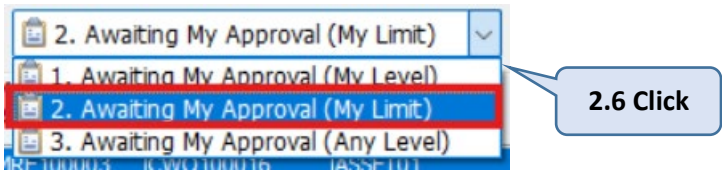


Figure 2.5

2.7 The result will show all the MR that need to be approve on your limit.

2. Awaiting My Approval (My Limit)													
<div>ViewPrint\$ LimitApproveDisapproveRejectCancel</div>													
Material Request No	Work Order No	Asset No	MR Status	Origination Date	MR Approval Status	Approval Status	Total Cost	Issue Status	Release For Approval	Email Notification	Email Requested By	Next Approver	
MRE100003	CWO100016	ASSET01	MTR	11/06/2024	Awaiting (W)	0 / 0	1,500.00	Not Issue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
MRE100004	CWO100011	001100001	MTR	11/06/2024	Awaiting (W)	0 / 0	.00	Not Issue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
MRE100005	CWO100012	001100001	MTR	11/06/2024	Awaiting (W)	0 / 0	.00	Not Issue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Figure 2.6