EVANTAGE SOLUTIONS SDN BHD

Computerized Maintenance Management System
(CMMS)

USER MANUAL
(Approval Level)

TABLE OF CONTENT

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.
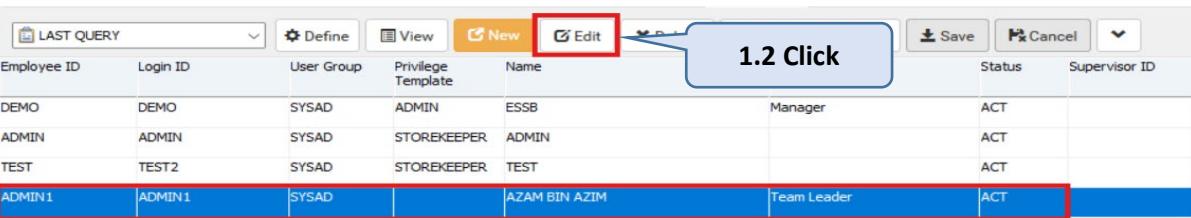
Figure 1.2

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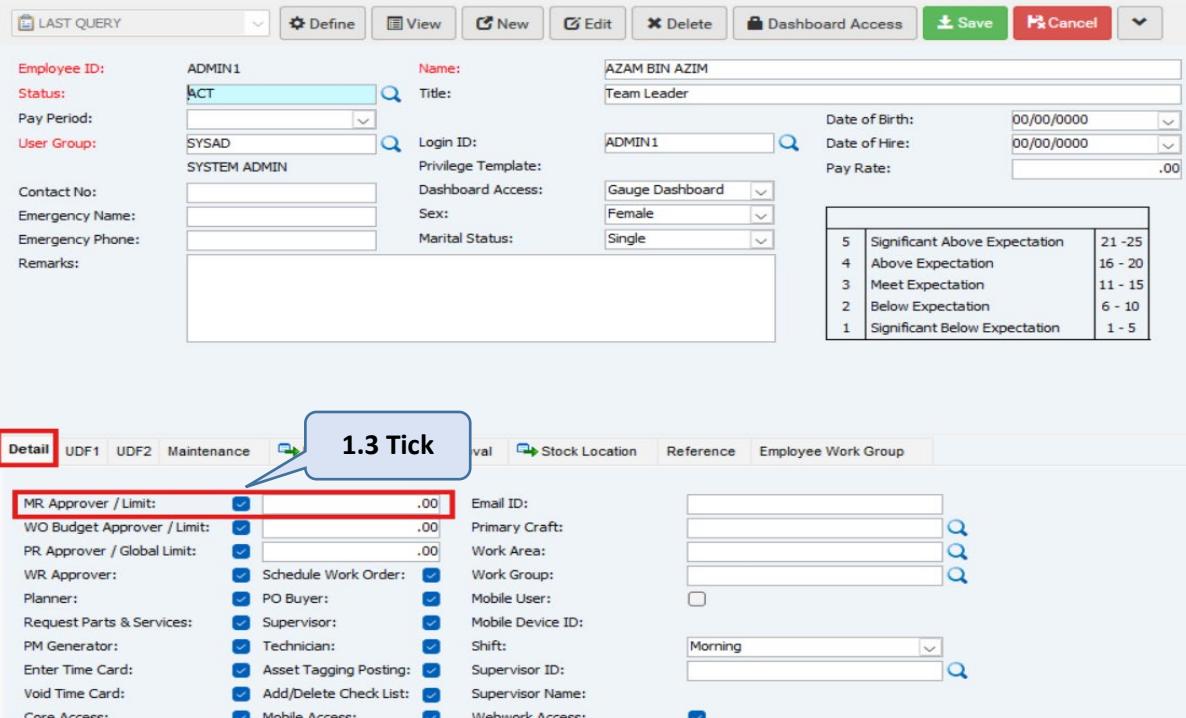
Figure 1.3

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.
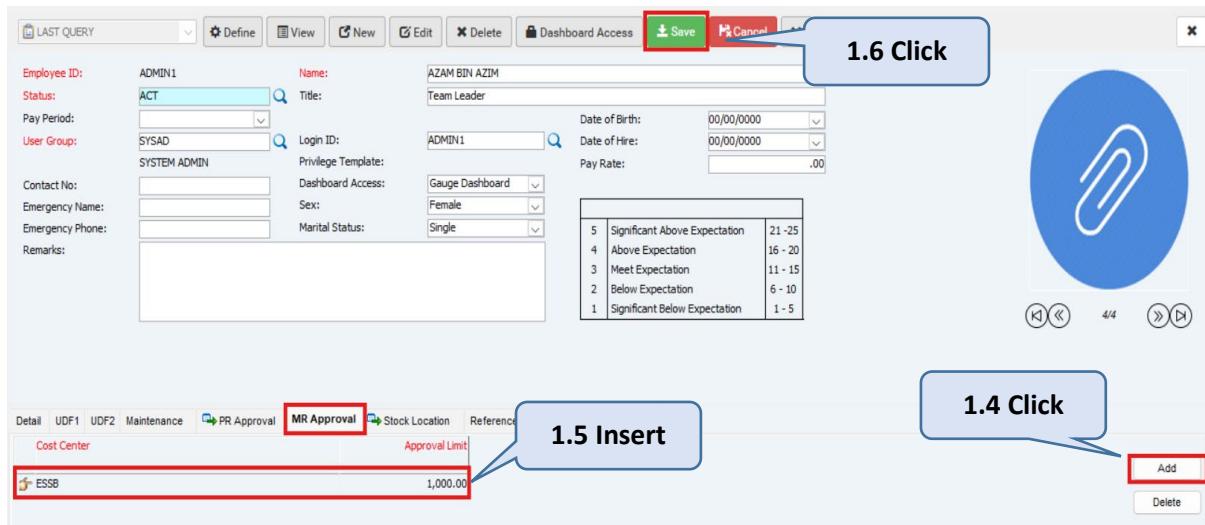
Figure 1.4

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**.
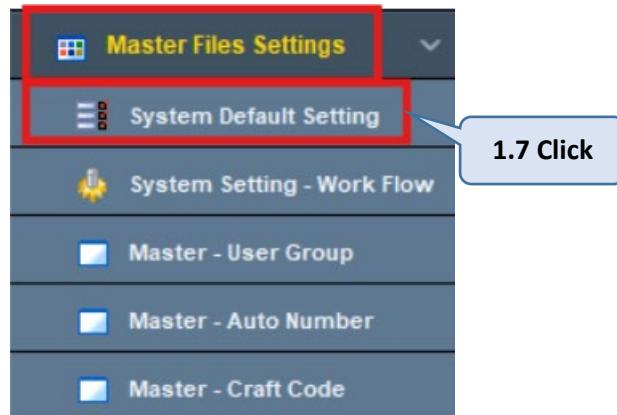

Figure 1.5

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.
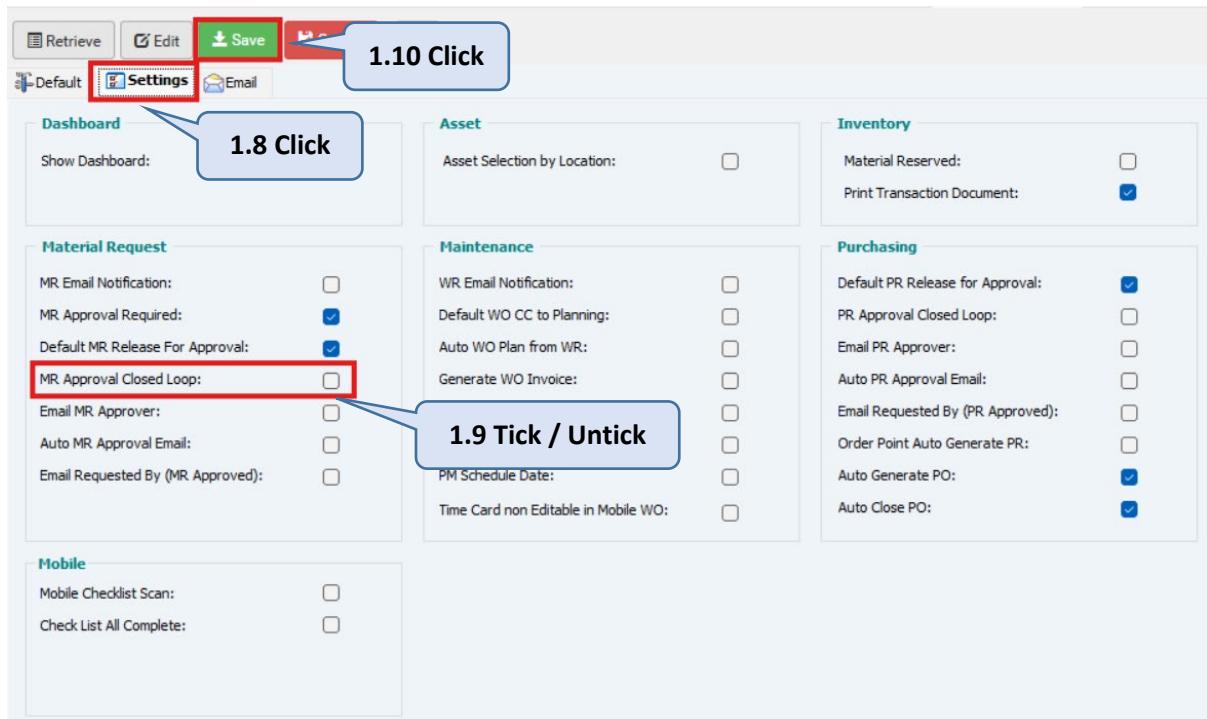
Figure 1.6

1.11   To set the MR Approval Level, on the left panel of the system, click on **Master Files Settings > System Setting – Work Flow**.
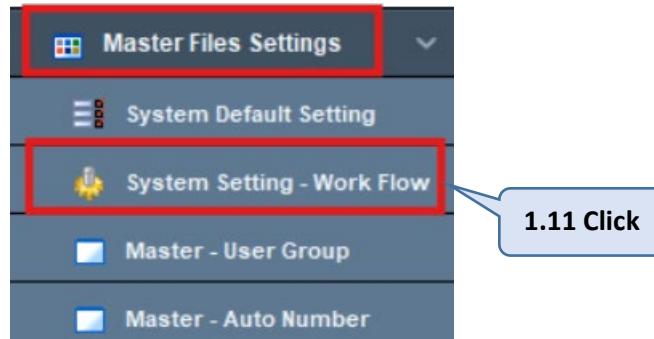
Figure 1.7

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.
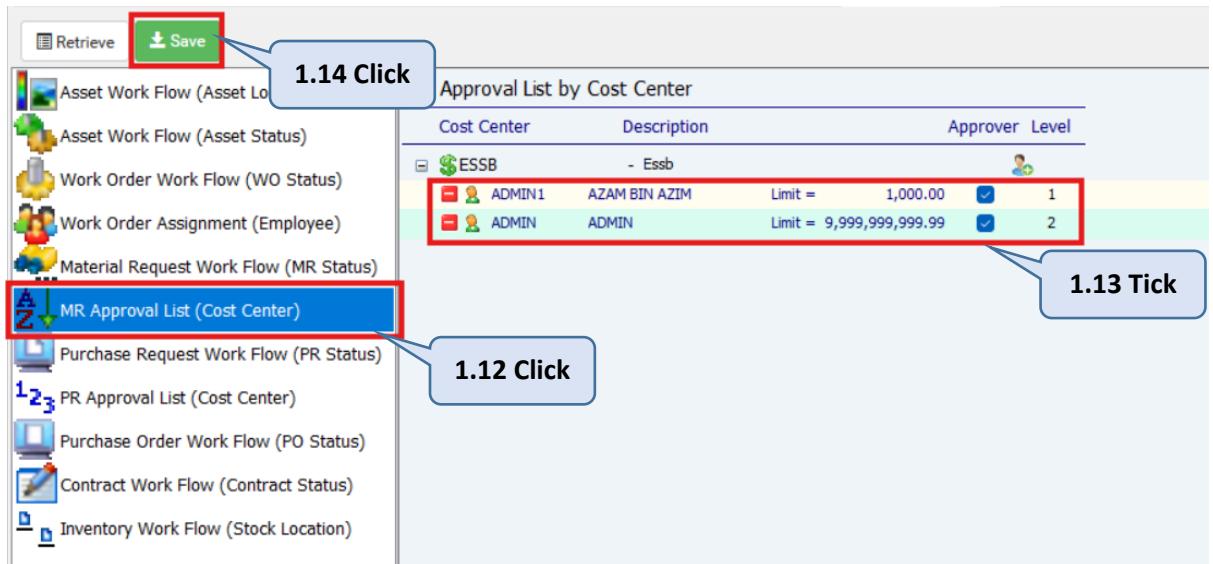
Figure 1.8

1.15   To check the setting has been applied, on the left panel of the system, click on **Maintenance > MR Approval**.
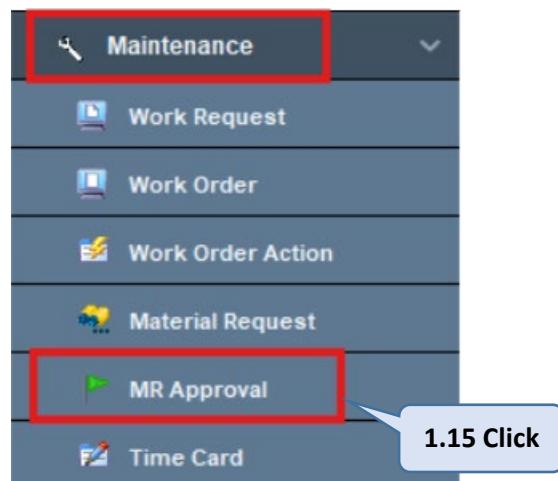
Figure 1.9

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.


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.
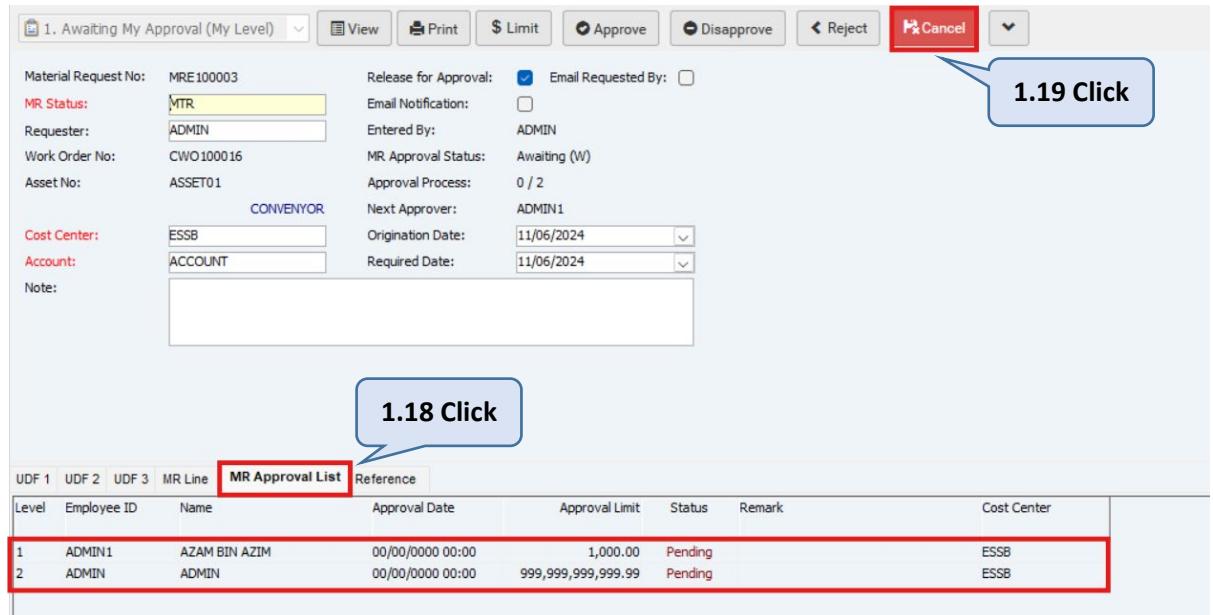
Figure 1.12

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.
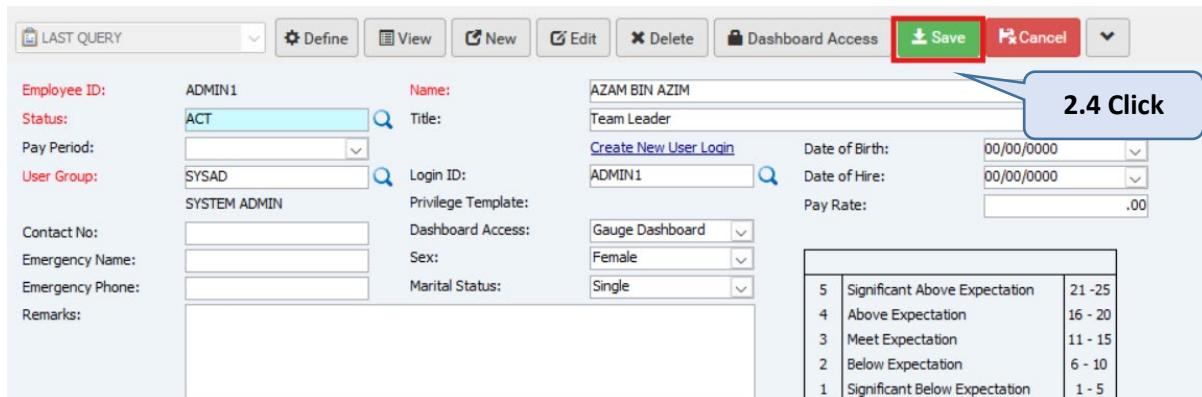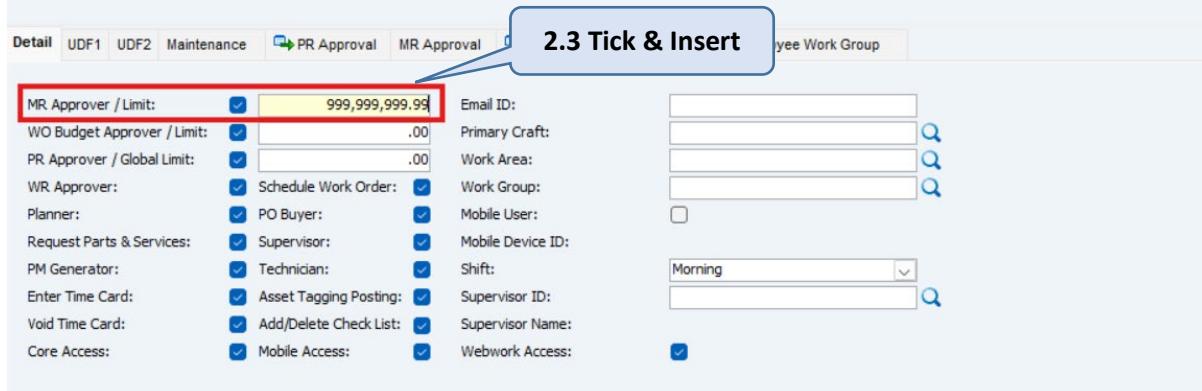
Figure 2.3

2.5   To check the setting has been applied, on the left panel of the system, click on
   **Maintenance > MR Approval**.
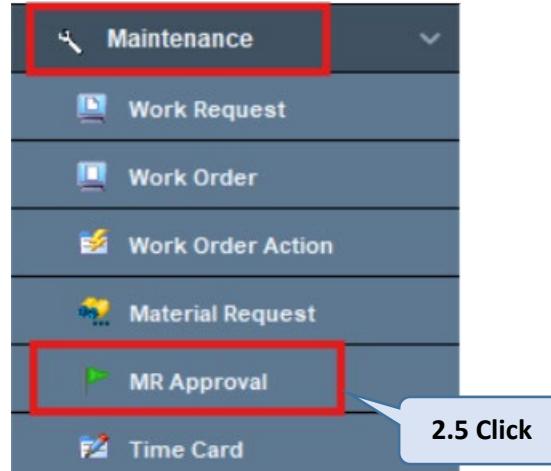
Figure 2.4

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.

Figure 2.6