

HOW DO I APPROVE A CHANGE REQUEST?

OVERVIEW

Any change to an approved budget will be handled through the change management process.

The main processes within change management are:

1. Input a change request
2. Submit the change request for approval
3. **Select the appropriate approval action (approve or reject)**

QUICK REFERENCE TERMINOLOGY

- *Approval Workflow*: This is the distribution path for the approval of opportunity/project information (from Pre-PO to Budget Approval).
- *Approved Budget*: EcoSys status - once an original budget is approved by the Gatekeeper and the L1-L# Approver as appropriate. The approved portion of the original budget.
- *Budget Workflow*: This is performed by the Project Approvers who approve an original budget and a change to the original budget (if applicable). The full Decisions Rights Matrix is loaded into EcoSys for every project in that portfolio. The project total installed cost determines who the approvers are for that specific project. Performed by the Project Approver(s).
- *Current Budget*: A Current Budget is composed of all approved Original Budgets plus all approved Changes funded from Supplemental approval.
- *Change*: the modification of an approved budget.
- *Change Management*: Requests to expand or reduce the project scope, modify policies, processes, plans or procedures, modify costs or budgets, or revise schedules.
- *Decision Rights Matrix*: The Decisions Rights Matrix defines the individuals that have the right to approve a project budget at each dollar level (based on Total Installed Cost). This is maintained in EcoSys and allows one matrix for each level in the Portfolio.
- *Level 0 Funding Approval Workflow*: This is performed by the Gatekeeper who reviews an original budget and a change to the original budget (if applicable) and advances it to the 'Budget Approval Workflow' (i.e. Project Approvers).
- *Time-phase*: It is a time-scaled budget or forecast of spending based on activities, created from a top-down budget or forecast of spending.

ECOSYS STEPS

To approve a change request, the following steps are done in EcoSys:

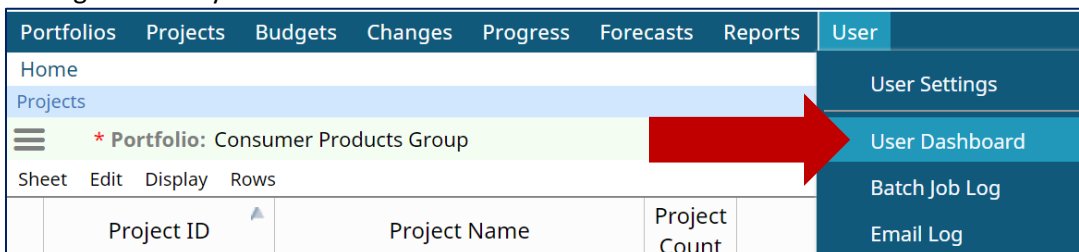
1. **Select** the project.
2. **(Optional) Review** the details.

3. **Approve.**
 - 3.1 **Approve** with the Change Menu.
 - 3.2 **Approve** with the User Dashboard.

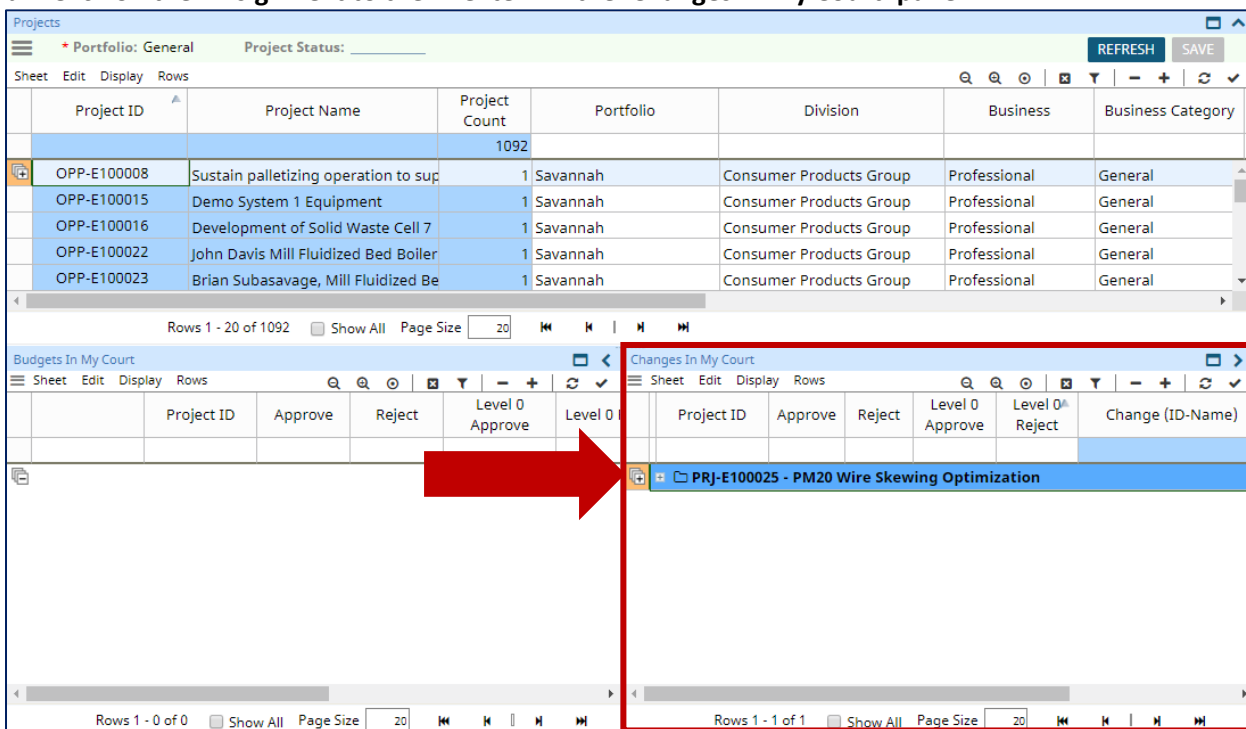
STEP-BY-STEP

1 – SELECT THE PROJECT

- a. Navigate to **User** > **User Dashboard**. This is the home page when you log in to EcoSys.



- b. Click on the '+' sign next to the line item in the 'Changes in My Court' panel.



Tip: You may need to scroll left in the 'Changes in My Court' panel to see the '+' sign.

- c. Click on the 'Change (ID-Name)' column, which is a hyperlink. This will open the 'Change Sections' in a new tab in your browser.

CHANGES

CHANGES

Project ID	Approve	Reject	Level 0 Approve	Level 0 Reject	Change (ID-Name)	Change ID
PRJ-E100025			Approve	Reject	CHG-000001 - Item Adjust	1

2 – (OPTIONAL) REVIEW THE DETAILS

- Click on the 'Change Register' tab.
- Click on the 'Change ID', which is a hyperlink.

Change ID	Change Name	Type	Status	Approval Date	Cost	Transfer Value	Approvals Log
CHG-000001	Item Adjustment	Scope Change	Submitted for Level 0 Approval		4,500	4,500	Approvals Log

The 'Change Details' panel opens below.

Change Register

Change ID	Change Name	Type	Status	Approval Date	Cost	Transfer Value	Approvals Log
CHG-000001	Item Adjustment	Scope Change	Submitted for Level 0 Approval		10,000	10,000	Approvals Log

Rows 1 - 1 of 1 Show All Page Size 20

Change Details

General Economic Summary Details Time-Phasing Documents Log

* Change: CHG-000001 - Item Adjustment

NEW COPY... DELETE REFRESH SAVE

*Change ID: CHG-000001 *Change Name: Item Adjustment Alternate ID: Objective

Type: Scope Change Status: Submitted for Level 0 Approval Funding Type: Supplemental

Estimated Cost: 0

- Review the general attributes of the change in the 'General' tab.

Change Register

Change ID	Change Name	Type	Status	Approval Date	Cost	Transfer Value	Approvals Log
CHG-000001	Item Adjustment	Scope Change	Submitted for Level 0 Approval		10,000	10,000	Approvals Log

Rows 1 - 1 of 1 Show All Page Size 20

Change Details

General Economic Summary Details Time-Phasing Documents Log

* Change: CHG-000001 - Item Adjustment

NEW COPY... DELETE REFRESH SAVE

*Change ID: CHG-000001 *Change Name: Item Adjustment Alternate ID: Objective

Type: Scope Change Status: Submitted for Level 0 Approval Funding Type: Supplemental

Estimated Cost: 0

- Review the economic summary of the change in the 'Economic Summary' tab.

CHANGES

CHANGES

e. Review the details of the change line items in the 'Details' tab.

Object Path ID	Cost Type ID	Cost	Description	Start Date	End Date	Curve
PRJ-E100025	Capital	10,000		04/25/2019	07/10/2019	Bell Curve

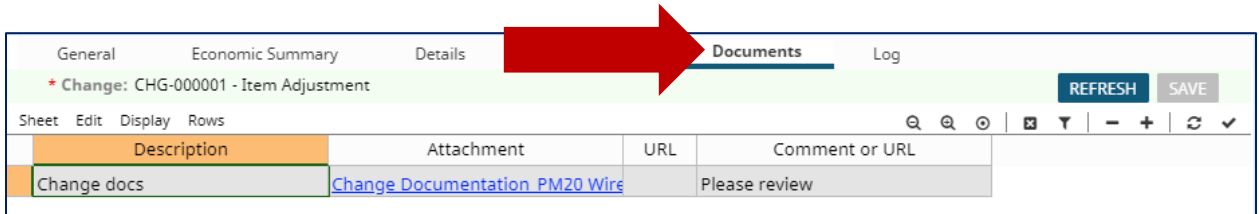
f. Review the time-phasing of the change in the 'Time-Phasing' tab.

Object Path ID	Cost Type	Delta Cost	Mar 2019 Cost	Apr 2019 Cost	May 2019 Cost	Jun 2019 Cost	Jul 2019 Cost
PRJ-E100025	Capital	0.00	0.00	414.42	4,316.62	4,500.21	768.75

g. Review any documentation associated with the change in the 'Documents' tab.

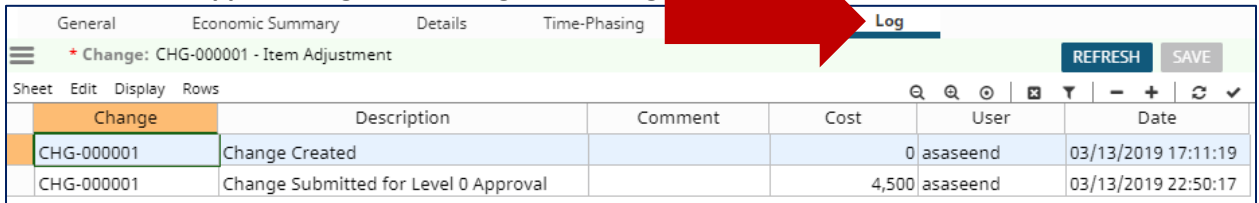
CHANGES

CHANGES



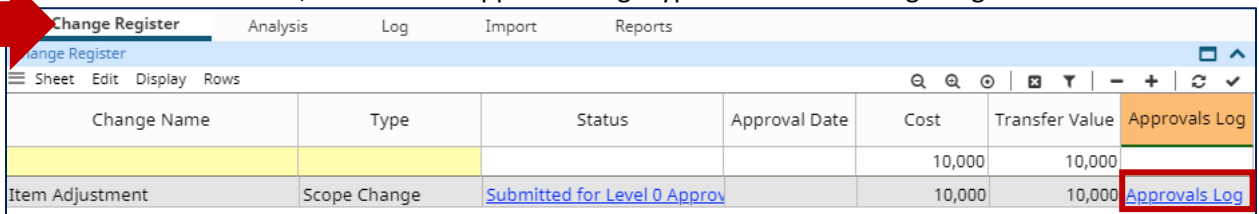
General		Economic Summary		Details		Documents		Log	
* Change: CHG-000001 - Item Adjustment									
Sheet	Edit	Display	Rows						
Description			Attachment		URL		Comment or URL		
Change docs			Change Documentation PM20 Wire				Please review		

h. Review the Approval Log of the change in the 'Log' tab.



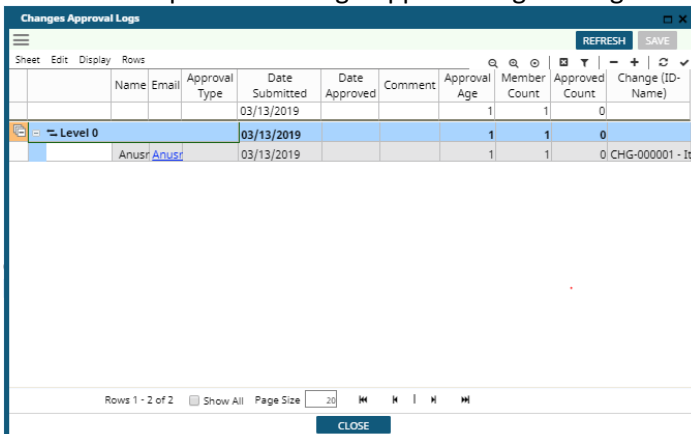
General		Economic Summary		Details		Time-Phasing		Log	
* Change: CHG-000001 - Item Adjustment									
Sheet	Edit	Display	Rows						
Change		Description		Comment		Cost		User	
CHG-000001		Change Created				0		asaseend	
CHG-000001		Change Submitted for Level 0 Approval				4,500		asaseend	
								Date	
								03/13/2019 17:11:19	
								03/13/2019 22:50:17	

Note: To view all of the other approvers in the list, who has approved at what date, along with their comments, click on the 'Approvals Log' hyperlink in the 'Change Register' tab.



Change Register		Analysis		Log		Import		Reports	
Change Register									
Sheet	Edit	Display	Rows						
Change Name		Type		Status		Approval Date		Cost	
								10,000	
Item Adjustment		Scope Change		Submitted for Level 0 Approval				10,000	
								10,000	
								Approvals Log	
								Approvals Log	

This will open the 'Change Approval Logs' dialog box.



Changes Approval Logs									
Sheet	Edit	Display	Rows						
Name	Email	Approval Type	Date Submitted	Date Approved	Comment	Approval Age	Member Count	Approved Count	Change (ID-Name)
			03/13/2019			1	1	0	
Level 0	Anusri Anusri		03/13/2019			1	1	0	CHG-000001 - It

3 – APPROVE

There are two ways to approve the change in EcoSys:

- 3.1 Approve with the Change Menu
- 3.2 Approve with the User Dashboard

3.1 – APPROVE WITH THE CHANGE MENU

- a. In the 'Change Register' tab, click the 'Status' for the submitted change, which is a **hyperlink**. The 'Status' may vary depending on where the change is in the 'Approval Workflow':
 - 'Submitted for L0 Approval' if it needs to be reviewed by the Gatekeeper

CHANGES

CHANGES

– ‘Submitted’ if it needs to be approved by the Project Approver(s)

Change Name	Type	Status	Approval Date	Cost	Transfer Value	Approvals Log
Item Adjustment	Scope Change	Submitted for Level 0 Appro		10,000	10,000	Approvals Log

The ‘Change Approval Status’ dialog box appears.

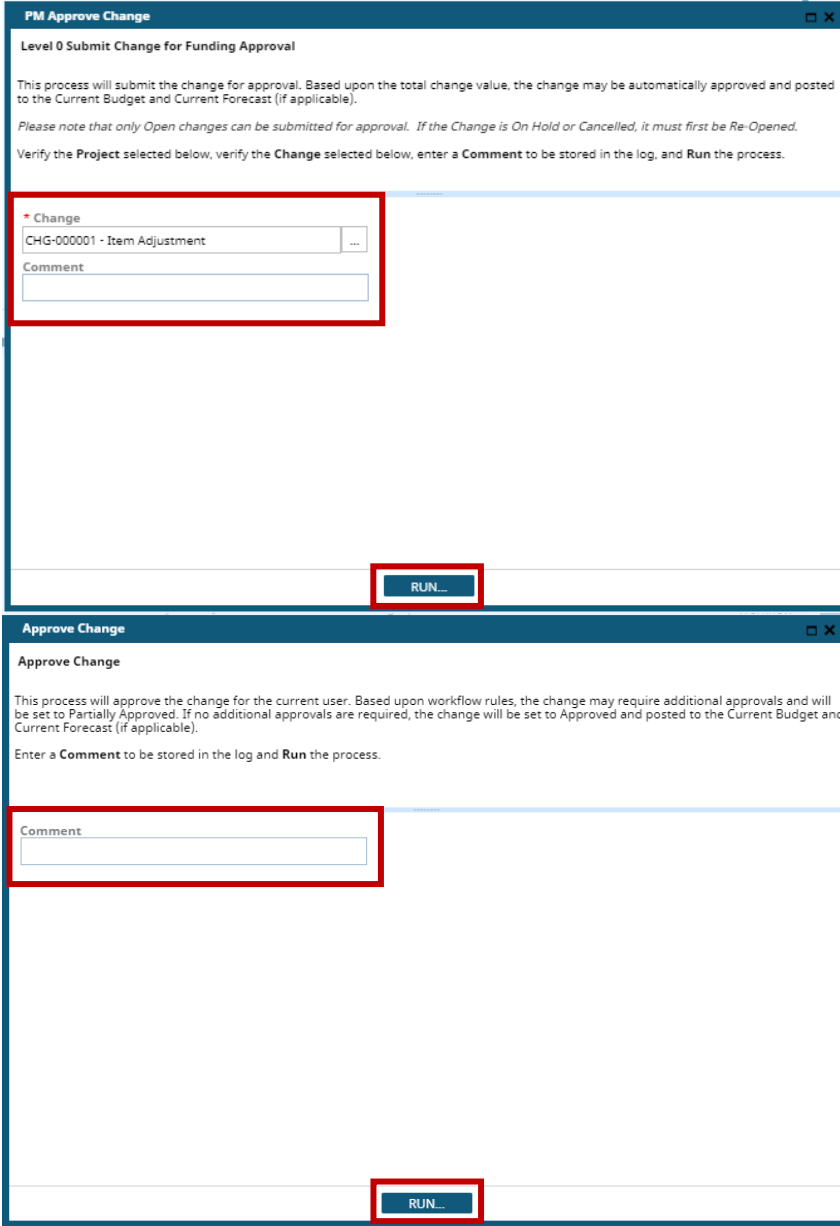
b. Select the appropriate action: ‘Approve’ or ‘Reject’. The ‘PM Approve Change’ (if you are a Gatekeeper) or the ‘Approve Change’ (if you are a Project Approver) dialog box appears.

Level	Approve	Reject	PM Approve	PM Reject	Name	Email	Approval Type	Date Submitted	Date Approved	Approval Age	Member Count	Approved Count
Level 0	Approve	Reject			Anus	Anus		03/13/2019			1	0

c. Update the Change if needed (if you are a Gatekeeper).

d. (Optional) Enter any ‘Comment’.

e. Click [RUN...](#)



Note that the 'Status' column on the 'Log' tab now says 'Submitted' (indicating that the change is awaiting approval by additional approvers), or 'Approved' (indicating that the change has been approved by all approvers).

Change ID	Change Name	Type	Status	Approval Date	Cost	Trans
CHG-000001	Item Adjustment	Scope Change	Submitted		10,000	

3.2 – APPROVE WITH THE USER DASHBOARD

- a. Navigate to User > User Dashboard .

CHANGES

CHANGES

Portfolios	Projects	Budgets	Changes	Progress	Forecasts	Reports	User
Home							User Settings
Projects							User Dashboard
* Portfolio: Consumer Products Group							Batch Job Log
Sheet Edit Display Rows							Email Log
Project ID	Project Name		Project Count				

- b. In the 'Changes in My Court' panel (bottom right-hand side), select the appropriate action: 'Approve' or 'Reject'. The 'PM Approve Change' (if you are a Gatekeeper) or 'Approve Change' (if you are a Project Approver) dialog box appears.

Project ID	Project Name	Project Count	Portfolio	Division	Business	Business Category	Location
OPP-E100008	Sustain palletizing operation to sup	1	Savannah	Consumer Products Group	Professional	General	Savannah
OPP-E100015	Demo System 1 Equipment	1	Savannah	Consumer Products Group	Professional	General	Savannah
OPP-E100016	Development of Solid Waste Cell 7	1	Savannah	Consumer Products Group	Professional	General	Savannah
OPP-E100022	John Davis Mill Fluidized Bed Boiler	1	Savannah	Consumer Products Group	Professional	General	Savannah
OPP-E100023	Brian Subasavage, Mill Fluidized Be	1	Savannah	Consumer Products Group	Professional	General	Savannah

Project ID	Approve	Reject	Level 0 Approve	Level 0 Reject	Change (ID-Name)
PRJ-E100025	Approve	Reject			CHG-000001 - Item Adjust

Project ID	Approve	Reject	Level 0 Approve	Level 0 Reject	Change (ID-Name)
PRJ-E100025	Approve	Reject			CHG-000001 - Item Adjust

- c. Update the Change if needed (if you are a Gatekeeper).
 d. (Optional) Enter any 'Comment'.
 e. Click **RUN...**

PM Approve Change □ ×

Level 0 Submit Change for Funding Approval

This process will submit the change for approval. Based upon the total change value, the change may be automatically approved and posted to the Current Budget and Current Forecast (if applicable).

Please note that only Open changes can be submitted for approval. If the Change is On Hold or Cancelled, it must first be Re-Opened.

Verify the **Project** selected below, verify the **Change** selected below, enter a **Comment** to be stored in the log, and **Run** the process.

* Change

CHG-000001 - Item Adjustment ...

Comment

RUN...

Approve Change □ ×

Approve Change

This process will approve the change for the current user. Based upon workflow rules, the change may require additional approvals and will be set to Partially Approved. If no additional approvals are required, the change will be set to Approved and posted to the Current Budget and Current Forecast (if applicable).

Enter a **Comment** to be stored in the log and **Run** the process.









Comment

RUN...

Note that the change line item that has been approved no longer appears in the 'Changes in My Court' panel.

CHEAT SHEET

Approving a change request in EcoSys involves the following steps:

Actions	No	Step-By-Step Instructions
1 – Select the project	a	Navigate to  >  . This is the home page when you log in to EcoSys.
	b	Click on the '+' sign next to the line item in the 'Changes in My Court' panel.
	c	Click on the 'Change (ID-Name)' column, which is a hyperlink. This will open the 'Change Sections' in a new tab in your browser.
2 – (Optional) Review the details	a	Navigate to  > 
	b	Click on the  next to 'Project' on the parameter bar to select the project.
	c	Click on the 'Change Register' tab.
	d	Click on the 'Change ID', which is a hyperlink. The 'Change Details' panel opens below.
	e	Review the general attributes of the change in the 'General' tab.
	f	Review the economic summary of the change in the 'Economic Summary' tab.
	g	Review the details of the change line items in the 'Details' tab.
	h	Review the time-phasing in the 'Time-Phasing' tab.
	i	Review any documentation associated with the change in the 'Documents' tab.
3.1 – Approve with the Change Menu	a	In the 'Change Register' tab, click the 'Submitted for Level 0 Approval' hyperlink under the 'Status' column. The 'Change Approval Status' dialog box appears.
	b	Select the appropriate action: 'Approve' or 'Reject'. The 'PM Approve Change' dialog box appears.
	c	Update the Change if needed (if you are a Gatekeeper).
	d	(Optional) Enter any 'Comment'.
	e	Click 
3.2 – Approve with the User Dashboard	a	Navigate to  > 
	b	Click on the '+' sign next to the line item in the 'Changes in My Court' panel (bottom right-hand side) to expand it.
	c	Select the appropriate action: 'Approve' or 'Reject'. The 'PM Approve Change' dialog box appears.
	d	Update the Change if needed.
	e	(Optional) Enter any 'Comment'.
	f	Click 