Approvals

Learn how to review, approve, or reject the annual maintenance plan that has been submitted for approval to the body corporate.

- Submit current working year for approval
- Approve or reject current working year
- Approved years

Submit current working year for approval

The **Approval Screen** allows users to manage the **approval process for the annual maintenance plan and budget**.
It ensures that changes are reviewed and confirmed before becoming final.

How it works

Throughout the year, the **budget for the current period** remains **open and editable**.
During this time, users can:

- Create new maintenance tasks
- Adjust existing tasks
- Update costs, frequencies, and other settings

Once the maintenance plan and budget are **finalised**, they can be **submitted for approval**.

Submitting for approval

1. Navigate to the **Approvals** link in the main menu.
2. Click **Submit for Approval**.

> Submitting the budget will **lock the maintenance plan**, preventing any further edits.
> This ensures the version submitted for approval remains consistent during review.

Approval status

After submission, the budget can be:

- **Approved** – the plan is confirmed and becomes the official budget for that year.
- **Rejected** – the plan is unlocked, allowing users to make adjustments and resubmit.

Unsubmitting a budget

- Before the budget is approved or rejected, the user can **unsubmit** it at any time.
- Unsubmitting will **unlock the maintenance plan**, allowing further changes.

Key points

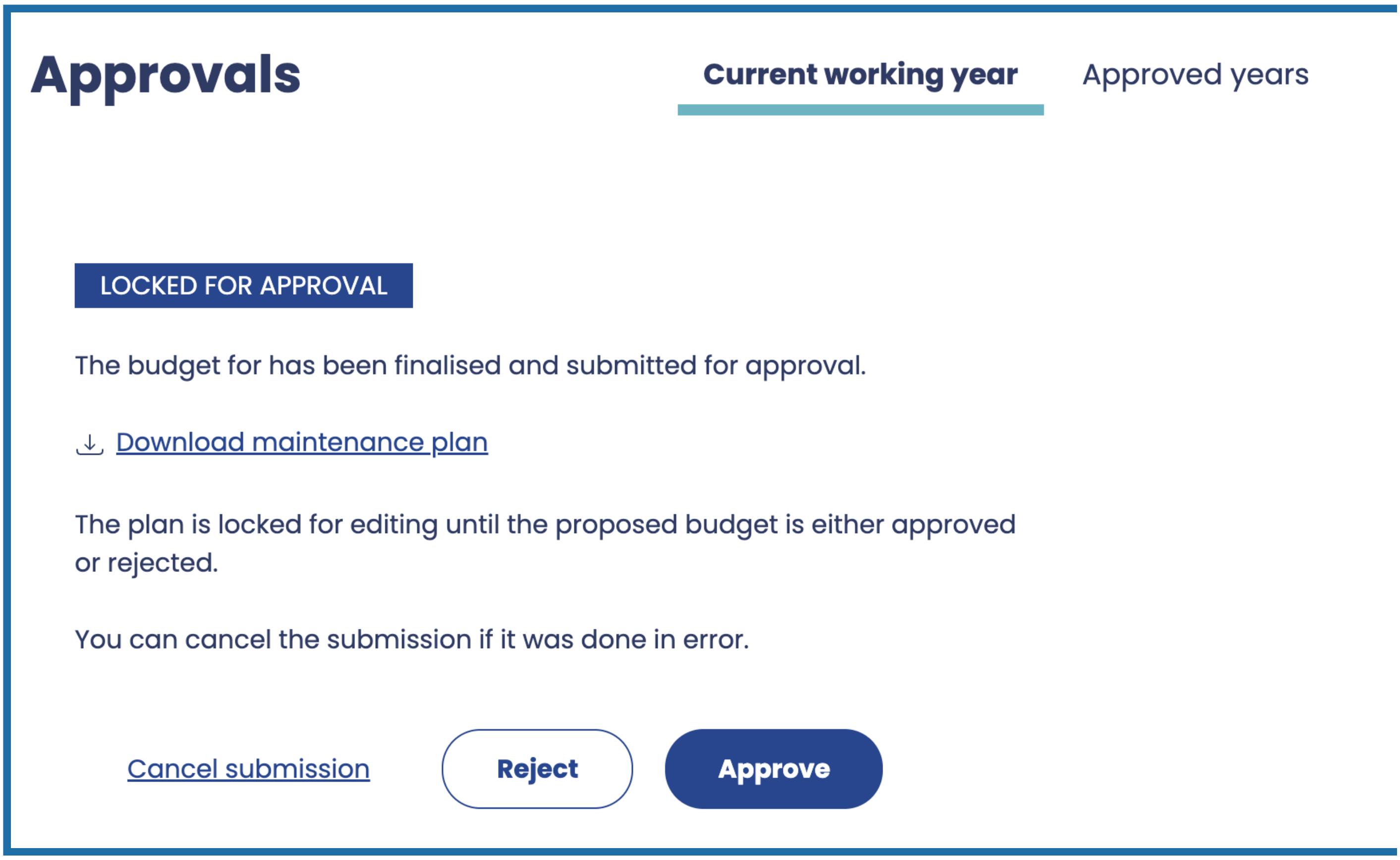
- Only **one budget** can be open for editing at a time.
- Once submitted, **no changes** can be made until the review process is complete.
- The **approval workflow** helps maintain accountability and ensures all updates are properly reviewed before being finalised.

Approve or reject current working year

Once a budget has been **finalised and submitted for approval**, it moves to the **Budget Approval** screen.
From this page, users responsible for reviewing the plan can take one of several actions.

Available actions

1. **Approve**
   - Confirms the proposed maintenance plan and budget as the **official budget for the year**.
   - Once approved, the year can't be edited anymore and becomes the **authoritative version** used for reporting and forecasting.
2. **Reject**
   - Sends the budget back for revision.
   - The plan is **unlocked**, allowing users to make adjustments and **resubmit** for approval.
3. **Cancel Submission**
   - If the budget was submitted in error, the user can cancel the submission.
   - This **reopens the plan** for editing without triggering an approval or rejection.



Reviewing the plan

Before approving or rejecting, the user can:

- **Download the [Maintenance Plan PDF report]** for offline review or sharing.
- **Open the Maintenance Plan** within the application to review details such as tasks, costs, and forecasts.

Locked during review

While a plan is awaiting approval:

- **No edits can be made** to the maintenance plan and its tasks.
- The budget remains in a **read-only state** until an action (approve, reject, or cancel) is taken.

Key points

- Approval **finalises** the budget and prevents further edits.
- Rejection **unlocks** the budget for revision.
- Cancelling a submission **reverses** the submission process, allowing further edits before resubmitting.
- PDF exports and in-app review tools make it easy to verify details before final approval.

Approved years

The **Approved Years** page provides an overview of all previously approved maintenance plan budgets.
It serves as a **record of past approvals**, allowing users to review historical decisions and access approved documentation.

Viewing approved years

For each approved year, the following details are displayed:

- **Submitted by** – the name of the user who submitted the budget for approval.
- **Submission date** – when the budget was formally submitted.
- **Approved by** – the name of the user who approved the budget.
- **Approval date** – the date the approval was granted.
- **Approved contributions** – the total contribution amount approved for that year.
- **Approved plan PDF** – a downloadable copy of the maintenance plan as it was approved, preserving a historical snapshot.

Reviewing past approvals

This page allows users to:

- Download or review approved budgets for reference.
- Verify who approved and when each decision was made.
- Maintain a transparent audit trail of the approval history.

Reset approval

In some cases, it may be necessary to **reset an approval** — for example, if the plan needs to be reopened for adjustment.

- The **Reset Approval** feature becomes available **only if no changes have been made** to subsequent years of the plan since the approval was granted.
- Resetting the approval will **unlock that year's budget**, returning it to an editable state.

Key points

- Provides a **clear historical record** of all approved budgets.
- Allows users to **review, download, and verify** previous approvals.
- The **Reset Approval** option gives admins flexibility while preserving data integrity.