

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.
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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.
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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.
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Revision #3

Created 15 October 2025 05:39:02 by Laurent Hautefeuille

Updated 5 February 2026 08:03:36 by Laurent Hautefeuille