Approvals Policy document for Microsoft Consulting Business

|  |  |
| --- | --- |
| Owner:  Mark Groves | Type: Dynamics 365 Project transactions-Approval policy |
| Contact: Approval Policy team | Category: Project team member compliance |
| Effective Date: 5/18/2024 | Policy Number: MS-001 |

1. Purpose

Approval policy document to help project managers identify anomalies with project transactions.

1. Summary

This policy document enables organizations to specify which project transactions need to be flagged for review by the project manager.

If no policy is defined in requirements, then none of the project transactions will get flagged.

Managers must carefully review transactions flagged as “needs review” and approve them after ensuring that the issues have been addressed as this directly impacts project invoicing.

Requirements

Transactions that meet the criteria defined below should be flagged as “Needs review” by the approver. Remaining transactions can be marked as “Ready for approval”.  If there are transactions that are marked as “Ready for approval” but however must be flagged for review in the future, then those should be added to this policy document.  To stop flagging transactions pertaining to a specific policy type, remove the related criteria from the requirements section.

Criteria for compliance of material usage transactions

1. Material transactions with total amount as 0.
2. Material usage that exceeds NTE limits set up on the project contract or project contract line or project contract customer or project contract line customer.
3. Material transactions that exceed the budget set up on the project
4. Quantity of material usage submitted against a subcontract line exceeds the available quantity on the Subcontract line.
5. Purpose of material usage is not described.
6. Material entries that were submitted with comments having spelling or grammar mistakes.
7. Material usage submitted by contractors for Project “Robotics Installation”

 Exceptions :

|  |  |  |
| --- | --- | --- |
| For the org unit USPM, Project “Holidays” | Project specific approval | Mark all transactions as “Ready to approve” |
|  |  |  |
|  |  |  |
|  |  |  |