accruent

BIGCenter 17.10.2

» Release Notes

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Release Information

Release Version: 17.10.2

Date of Release: November 9th, 2017

Introduction

This document describes the features and functionality of the BIGCenter 17.10.2 release. Enhancements have been delivered for Leases, Portfolio Center, and Purchase Orders. Additionally, we are also releasing the new Project Initiations workspace. Learn more about this workspace in the Features & Enhancements section, below.

Ideas for improving BIGCenter

We invite you to submit enhancement requests on the BIGCenter Ideas page, visible to both internal Accruent employees and Support Contacts for other BIGCenter customers. You can now vote for or against these ideas, add or respond to comments, and view the status of all ideas.

This direct feedback allows Accruent to gain visibility into what is meaningful to customers. Product Management actively monitors the Ideas board, adds comments, and updates the status of ideas as needed.

Please contact BIGCenter Support for any questions about Ideas.

Features & Enhancements

Project Initiation Workspace

The **Project Initiation** workspace gives administrators a set of controls to validate project requirements before project creation. This simplifies the project creation workflow by eliminating the need for manual, verbal, or hand-written request systems. Users with access to the **Project Initiation** workspace can create a project initiation request, which they can then submit to an approver. The approver can then review the request and determine if any further data is necessary.

Contact BIGCenter Support to enable the **Project Initiation** workspace for your organization.

Read the following instructions sets to learn more about Project Initiations.

Create a Project Initiation Request

To create a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.

2. Click the **Create** button + in the toolbar at the upper-right corner of the page.
   The **Create New Project Initiation** page opens.

3. Complete the following in the **Summary** table:
   - **Request Number** – Enter the **Request Number**.
   - **Request Number Alias** – Enter a custom alias for the **Request Number**.
   - **Request Substatus** – From the drop-down menu, select the **Request Substatus**. These substatuses are configurable.
   - **Classification** – From the drop-down menu, select the **Classification** of the project. The options in the **Classification** drop-down menu are configurable.
   - (required) **Project Name** – Enter the **Project Name**.
   - (required) **Project Type** – From the drop-down menu, select the **Project Type**.
   - **Confidential** – From the drop-down menu, select either **Yes** or **No** (informational only).
   - (required) **Description** – Enter a description of the project.
   - **Confidential Reason** – Enter the reason the project is confidential (informational only).

4. Complete the following in the **Location** table:
   - (required) **Hierarchy** – Use this type-ahead field to select the level of hierarchy from those used in the application by your organization.
   - **Space Use** – From the drop-down menu, select how the space will be used.
   - **Country** – From the drop-down menu, select the country.
   - **State/Province** – From the drop-down menu, select the state or province.
   - **City** – From the drop-down menu, select the city.

5. Complete the following in the **Dates** table:
   - (required) **Year of Project** – From the drop-down menu, select the year of the project.
   - **Anticipated Start Date** (Custom configuration option; contact Support if you want this field enabled.)
     1. Click in the **Anticipated Start Date** field.
        A date picker opens.
     2. Select the **Anticipated Start Date**.
   - **Anticipated Completion Date** (Custom configuration option; contact Support if you want this field enabled.)
     1. Click in the **Anticipated Completion Date** field.
        A date picker opens.
     2. Select the **Anticipated Completion Date**.

6. Complete the following in the **Impact** table:
   - **Key Initiative** – From the drop-down menu, select either **Yes** or **No**.
     - Select **Yes** if the project is a critical or key project.
     - Select **No** if the project is not a critical or key project.
   - **Rentable Area** – Enter the rentable area.
   - **Measurement Unit** – From the drop-down menu, select the measurement unit (for example, square feet).
   - **Seats Impacted** – Enter the number of seats impacted by the project.
   - **FTE Impacted** – Enter the number of full-time employees impacted by the project.
   - **# of Locations Impacted** – Enter the number of buildings impacted by the project.

7. Complete the following in the **Financial** table:
   - **Estimated Budget** – Enter the **Estimated Budget**.
   - **Currency** – From the drop-down menu, select the **Currency**.
   - **Financial Impact** – From the drop-down menu, select the **Financial Impact**.
     The options in the **Financial Impact** drop-down menu are configurable.
   - **AP System** – From the drop-down menu, select the **Accounts Payable** system.
   - **General Ledger** – Enter the **General Ledger** into this type-ahead field.
   - **Cost Center** – Enter the **Cost Center** into this type-ahead field.
   - **Business Unit** – Enter the **Business Unit** into this type-ahead field.

8. Complete the following in the **Additional Information** table:
   - **Team Lead** – Enter the team lead's name in this type-ahead field.
   - **Other Business Identifier** – Enter any custom business identifier.
   - **Operating Company** – Enter the **Operating Company**.
   - **Rationale** – Enter the rationale for the project.
   - **Justification** – Enter the justification for the project.
   - **Additional Information** – Enter any additional information pertinent to the project.

9. Complete the following in the **Asset Information** table:
    - **New Asset** – From the drop-down menu, select either **Yes** or **No**.

    > **NOTE:** The **Asset Information** section is used when the project is for the creation of a new building.

    If you select **Yes**, the below fields become active:
    - **Building Code** – Enter a custom building code.
    - **Building Name** – Enter the building name.
    - **Building Address** – Enter the building street address.
    - **Country** – From the drop-down menu, select the country.
    - **State/Province** – From the drop-down menu, select the state/province.
    - **City** – From the drop-down menu, select the city.
    - **Postal Code** – Enter the postal code.

10. Click the **Save** button .
    The **Create New Project Initiation** page closes. Your new project initiation request appears in the **Collections** pane.

For more information about Project Initiation, select from the following topics:

- Summary Detail Section
- Approvals Detail Section
- Buildings Detail Section
- Comments Detail Section
- Contacts Detail Section
- Documents Detail Section

> **NOTE:** To perform actions in the following detail sections, you need to be able to see the **Summary** pane. Click the **List View** and **Summary View** buttons to toggle different content views.

Summary Detail Section

Edit a Project Initiation Request

To edit a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** you want to edit.
3. Select the **Summary** detail section in the **Detail Section** menu.
4. Click the **Edit** button in the toolbar on the right side of the **Summary** pane.
   The **Project Initiation Summary** pane expands to full-page and becomes editable.
5. Make your changes.
   See steps 3 – 9 of the Create a Project Initiation Request instructions set for more information.
6. Click the **Save** button (or the **Cancel** button to exit without saving) in the toolbar on the right side of the **Summary** pane.
   Your changes are saved.

Create a Project Based Upon a Project Initiation Request

> **NOTE:** Before a project can be created, the project initiation request must first be approved. See the Approvals Detail Section section to learn more.

> **NOTE:** The **Project ID** will be the same as the **Request ID** of your project initiation request.

To create a project based upon a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** you want to create a project based upon.
3. Select the **Summary** detail section in the **Detail Section** menu.
4. Click the **Create Project** button in the toolbar on the right side of the **Summary** pane.
   The **Create New Project** modal window opens.
5. Choose between two options:
   - Use a project template:
     1. Click the **Template** tab.
        The **Template** tab is selected by default.
     2. Enter the name of a saved template in the **Search Templates** type-ahead field.
     3. Click the **Next** button.

- Create a new project without a template:
    1. Click the **New** tab.
    2. Click the **Next** button.

The **Create Project** window opens in the **Projects** workspace. Some of the information from your project initiation request is already populated in the project.
Your new project appears in your **My Projects** collection.

View a Project Based Upon a Project Initiation Request

To view a project based upon a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose project you want to view.
3. Select the **Summary** detail section in the **Detail Section** menu.
4. Click the **View Project** button in the toolbar on the right side of the **Summary** pane.
   The **Projects** modal window opens.
5. Once you are done viewing the project, click the **Close** button in the upper-right corner of the modal window.

Approvals Detail Section

The **Project Initiation** workspace tracks when requests for approval are sent, and by whom. The workspace also tracks when an approver replies to a request for approval.

Approvers can have different approval thresholds and permissions, depending on how their user class is configured. All approval requests are required to have at least one final approver.

Add Approvers to a Project Initiation Request

To add approvers to a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** you want to add approvers to.
3. Select the **Approvals** detail section in the **Detail Section** menu.
4. Click the **+** button + in the **Approvals** pane header.
   The **Add Approvers** page opens.
5. Enter a full or partial name in the **First Name** and **Last Name** fields.
6. (optional) Select the **Show Final Approvers** check box if you want to see final approvers in your search results.

> **NOTE:** You are required to have at least one final approver in your approvers list. Final approvers are indicated by a * next to their name.

7. Click the **Search** button to the right of the **Last Name** field.
   The results matching your search criteria appear in a table.
8. Select the check boxes next to the approvers you want to add to the project initiation request.
9. From the **Notify Method** drop-down menu, select how you would like the approvers to be notified.
10. Enter a numerical value in the **Position** field to indicate the order in which you would like approvers to be contacted for approval.

> **NOTE:** The **Position** field allows you to create multiple levels of approval for a request—for example, you could structure your request so that three 1^{st} level approvers must approve the request before it is sent to upper management for final approval. Higher-level approvers will not be notified about requests until the previous level of approvers approves the request.

11. (optional) Select the **Notify Only** check box if you want to send the approver email notifications about the progress of the approval, but you do not want them to be able to take action.
12. (optional) Select the **Notify Now** check box to send an immediate notification to the approver. This action can be repeated as necessary.
13. Click the **Save** button.
    The **Add Approvers** page refreshes. The approver is added to the **Existing Approvers** table.
14. Click the **Cancel** button to navigate back to the **Approvals** page.

Edit Project Initiation Request Approvers

To edit the approvers of a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose approvers you want to edit.
3. Select the **Approvals** detail section in the **Detail Section** menu.
4. Click the **Edit** button in the **Approvals** pane header.
   The **Edit/View Approver Detail** page opens.
5. Make your changes.
   See the Add Approvers to a Project Initiation Request instructions set, steps 9 – 11 for more information.
6. Click the **Save** button.
   The **Approvals** page opens. Your approvers have been updated.

Delete Approvers from a Project Initiation Request

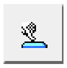
To delete approvers from a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose approvers you want to delete.
3. Select the **Approvals** detail section in the **Detail Section** menu.
4. Click the **Delete** button in the **Approvals** pane header.
   The **Remove Approvers** page opens.
5. Click the **Delete** button next to the approver(s) you want to delete.
   The approver is deleted from the approvers list.
6. Click the **Cancel** button once you are done deleting approvers.

Send Project Initiation Request for Approval

> **NOTE:** To send a project initiation request for approval, you must first add approvers. See the Add Approvers to a Project Initiation Request instructions set for more information.

To send a project initiation request for approval, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** that you want to send for approval.
3. Select the **Approvals** detail section in the **Detail Section** menu.
4. Click the **Submit for Approval** button  in the **Approvals** pane header.
   The project initiation request is submitted for approval.

Take Action on a Project Initiation Request

> **NOTE:** If there are multiple approvers, any reject or revise action by one approver will halt the entire approval process.

To approve, reject, or request a revision on a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** that you want to approve.
3. Select the **Approvals** detail section in the **Detail Section** menu.
4. Click the **Take Action** button in the **Action Taken** column next to your name.
   The **Perform Approval** page opens.
5. (optional) Enter a comment in the **Comment** field.
6. Choose between three options:
   1. Click the **Approve** button to approve the project initiation request.
      The project initiation request is approved.
   2. Click the **Reject** button to reject the project initiation request.
      The project initiation request is rejected.
   3. Click the **Revise** button to request a revision of the project initiation request.
      A comment is required for the **Revise** action.
      The project initiation request is sent back to the submitter with comments. The submitter must meet the requirements of the approver before resubmitting for approval.

Reactivate Approvals on a Revised Project Initiation Request

To allow a user to re-submit a project initiation request for approval, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose approvals you want to reactivate.
3. Select the **Approvals** detail section in the **Detail Section** menu.
4. Click the **Re-Activate Approval** button in the **Approvals** pane header.
   The project initiation request can now be re-submitted for approval.

Override Multiple Approvers on a Project Initiation Request

To override multiple approvers (for example, in the case that one or more approvers are unable to respond to an approval request), follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose approvers you want to override.
3. Select the **Approvals** detail section in the **Detail Section** menu.

4. Click the **Override Multiple** button in the **Approvals** pane header.
   The **Override Multiple** page opens. The approvers assigned to the project initiation request appear in a table.
5. Choose between two options:
   - To override one or more, but not all approvers, follow these steps:
     1. From the **Action To Take** drop-down menu(s), select the action(s) you want to take on behalf of the approver(s).

        NOTE: The **Skip** action allows you to skip an approver in the approvers list. If you are the only final approver or if the other final approvers have all been skipped, the **Skip** action will not be available. At least one final approver must take action (approve/reject/revise) for every approval.

     2. (optional) Enter a comment in the **Comment** field(s).
     3. Click the **Submit** button.
   - To mark all approvers as approving the request, follow these steps:
     1. (optional) Enter a comment in the field to the left of the **Approve** button .
     2. Click the **Approve** button .
        The project initiation request has now been approved on behalf of all assigned approvers.

Buildings Detail Section

> **NOTE:** A project initiation request can be associated with one or multiple buildings, but it is not required.

Associate a Project Initiation Request with a Building

To associate a project initiation request with a building, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** you want to associate with a building.
3. Select the **Buildings** detail section in the **Detail Section** menu.
4. Click the **Add Building** button + in the toolbar on the right side of the **Summary** pane.
   The **Add Building** modal window opens.
5. Enter the name of the building in the **Building** type-ahead field.
6. Click the **Save** button.
   The **Add Building** modal window closes. The building appears in the **Buildings** pane.

Remove a Building from a Project Initiation Request

To remove a building from a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** you want to remove a building from.
3. Select the **Buildings** detail section in the **Detail Section** menu.
4. Select the building you want to remove.
5. Click the **Delete Building** button in the toolbar on the right side of the **Summary** pane.
   A message appears, asking if you are sure you want to delete the building.
6. Click the **OK** button.
   The building is removed from the project initiation request. It no longer appears in the **Buildings** pane.

Comments Detail Section

Add a Comment to a Project Initiation Request

To add a comment to a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** to which you want to add a comment.
3. Select the **Comments** detail section in the **Detail Section** menu.
4. Click the **Add Comment** button + in the toolbar on the right side of the **Summary** pane.
   The **Add Comment** modal window opens.
5. Enter your comment in the **Comment** field.
6. Choose between two options:
   - Click the **Save** button.
     The **Add Comment** modal window closes. Your comment appears in the **Comments** pane.
   - Click the drop-down arrow next to the **Save** button and click **Save & New** from the menu that appears.
     The comment is saved and cleared from view. Repeat steps 5-6 until all comments are entered.

Edit a Comment on a Project Initiation Request

NOTE: You can only edit your own comments, unless you have been granted the appropriate editing permissions by your administrator.

To edit a comment on a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose comment you want to edit.
3. Select the **Comments** detail section in the **Detail Section** menu.
4. Select the comment you want to edit.
5. Click the **Edit Comment** button in the toolbar on the right side of the **Summary** pane.
   The **Edit Comment** modal window appears.
6. Make your changes.
7. Choose between two options:
   - Click the **Save** button.
     The **Edit Comment** modal window closes. Your comment appears in the **Comments** pane.
   - Click the drop-down arrow next to the **Save** button and click **Save & Next** from the menu that appears.
     The comment is saved and cleared from view. The next comment in the **Comments** pane appears. Repeat steps 6-7 until you have finished making your changes.

Delete a Comment from a Project Initiation Request

NOTE: You can only delete your own comments, unless you have been granted the appropriate permissions by your administrator.

To delete a comment from a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose comment you want to delete.
3. Select the **Comments** detail section in the **Detail Section** menu.
4. Select the comment you want to delete.
5. Click the **Delete Comment** button in the toolbar on the right side of the **Summary** pane.
   A message appears, asking if you are sure you want to delete the comment.
6. Click the **OK** button.
   The comment is deleted. It no longer appears in the **Comments** pane.

Email a Comment from a Project Initiation Request

To email a comment from a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose comment you want to email.
3. Select the **Comments** detail section in the **Detail Section** menu.
4. Select the comment you want to email.
5. Click the **Email Comment** button in the toolbar on the right side of the **Summary** pane.
   The **Email Comment** modal window opens.
6. Enter the recipient's email address in the **To** type-ahead field.
7. (optional) Enter the email addresses of any recipients you want to carbon copy in the **CC** type-ahead field.
8. (optional) Enter a personalized subject line for the email in the **Personalized Subject** field.
9. (optional) Enter a message in the **Message** field.
10. Click the **Send** button.
    The **Email Comment** modal window closes. Your email is sent.

Contacts Detail Section

Add Contacts to a Project Initiation Request

To add contacts to a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** to which you want to add contacts.
3. Select the **Contacts** detail section in the **Detail Section** menu.
4. Click the **Add Contact** button ＋ in the toolbar on the right side of the **Summary** pane.
   The **Add Contact** modal window opens.
5. Enter the contact's name in the **Name** type-ahead field.
6. From the **Contact Type** drop-down menu, select the appropriate contact type.
7. Choose between two options:
   - Click the **Save** button.
     The **Add Contact** modal window closes. Your new contact appears in the **Contacts** pane.
   - Click the drop-down arrow next to the **Save** button and click **Save & Next** from the menu that appears.
     The contact is saved and cleared from view. Repeat steps 5-7 until all contacts are entered.

Edit a Project Initiation Request Contact

To edit the contact type of a project initiation request contact, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose contact you want to edit.
3. Select the **Contacts** detail section in the **Detail Section** menu.
4. Select the contact you want to edit.
5. Click the **Edit Contact** button in the toolbar on the right side of the **Summary** pane.
   The **Edit Contact** modal window opens.
6. From the **Contact Type** drop-down menu, select a different contact type.
7. Click the **Save** button.
   The **Edit Contact** modal window closes. Your updated contact appears in the **Contacts** pane.

Delete a Project Initiation Request Contact

To delete a project initiation contact, follow these steps:

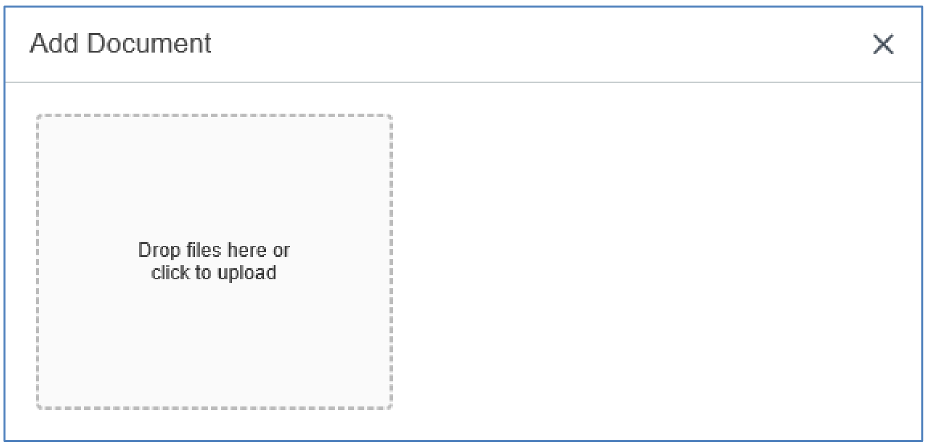
1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose contact you want to delete.
3. Select the **Contacts** detail section in the **Detail Section** menu.
4. Select the contact you want to delete.
5. Click the **Delete Contact** button in the toolbar on the right side of the **Summary** pane.
   A message appears, asking if you are sure you want to delete the contact.
6. Click the **OK** button.
   The contact is deleted. It no longer appears in the **Contacts** pane.

Documents Detail Section

Add a Document

To add a document to a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** to which you want to add a document.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the folder in which you want the document to be stored.
5. Click the **Add Document** button in the toolbar on the right side of the **Summary** pane.
   The **Add Document** modal window opens.



Add Document Modal Window.

6. Choose between two options:
   - Click the **Drop files here or click to upload** box.
     A file upload window opens. Select the document you want to upload. Click the **Open** button. The document will automatically begin to upload.
   - Drag and drop a document from your computer into the **Drop files here or click to upload** box.
     The document will automatically begin to upload.
7. Click the **Close** button in the upper-right corner of the **Add Document** modal window once the upload is complete.
   The new document appears in the **Documents** pane.
8. (optional) To change the name of the document, follow these steps:
   1. Double-click the document name.
      The document name becomes editable.
   2. Enter the new name in the **Name** field.
   3. Click the **Save** button (or the **Cancel** button to exit without saving) in the toolbar on the right side of the **Summary** pane.

Add a Folder

To add a folder to the documents detail section of a project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** to which you want to add a folder.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Click the **Add Folder** button in the toolbar on the right side of the **Summary** pane.
   A new folder appears in the **Documents** pane.
5. (optional) To change the name of the folder, follow these steps:
    1. Double-click the folder name.
       The folder name becomes editable.
    2. Enter the new name in the **Name** field.
    3. Click the **Save** button (or the **Cancel** button to exit without saving) in the toolbar on the right side of the **Summary** pane.

Check Out/Check In a Document

You can check out a document to make changes to it, and check in the document again when the changes are complete. When a document is checked out, no users can make edits to the document until you have checked the document in again.

To check out a document from your project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document you want to check out.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document you want to check out.
5. Click the **Check Out Document** button in the toolbar on the right side of the **Summary** pane.
   The document will download, and your computer will ask if you want to open or save the document.

To check in a document to your project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document you want to check in.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document you want to check in.
5. Click the **Check In Document** button in the toolbar on the right side of the **Summary** pane.
   The **Check In** modal window will open.
6. Click the **Browse** button.
   A file upload window opens. Select the file you want to upload. Click the **Open** button.
7. Click the **Save** button.
   The file upload window closes. Your document is checked in.

Delete a Document or Folder

To delete a document or folder from your project initiation request, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document or folder you want to delete.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document or folder you want to delete.
5. Click the **Delete** button .
   A message appears, asking if you are sure you want to delete the document or folder.
6. Click the **OK** button.
   The document or folder is deleted. It no longer appears in the **Documents** pane.

Email a Document

To email a document, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document you want to email.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document you want to email.
5. Click the **Send Document** button in the toolbar on the right side of the **Summary** pane.
   The **Send Document** modal window opens.
6. Enter the recipient's email address in the **To** type-ahead field.
7. (optional) Enter the email addresses of any recipients you want to carbon copy in the **CC** type-ahead field.
8. (optional) Enter a personalized subject line for the email in the **Subject** field.
9. (optional) Enter a message in the **Message** field.
10. Click the **Send** button.
    The **Send Document** modal window closes. Your email is sent.

Add Approvers to a Document

To add approvers to a document, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document you want to add approvers to.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document you want to add approvers to.
5. Click the **View Approval Information** button in the toolbar on the right side of the **Summary** pane.
   The **View Approval Information** modal window opens.
6. Click the **+** button + to add an approver.
   The **Add Approvers** page opens.

7. Enter a full or partial name in the **First Name** and **Last Name** fields.
8. (optional) Select the **Show Final Approvers** check box if you want to see final approvers in your search results.
9. Click the **Search** button to the right of the **Last Name** field.
   The results matching your search criteria appear in a table.
10. Select the check boxes next to the approvers you want to add to the document.
11. From the **Notify Method** drop-down menu, select how you would like the approvers to be notified.
12. Enter a numerical value in the **Position** field to indicate the order in which you would like approvers to be assigned.
13. (optional) Select the **Notify Only** check box if you want to send the approver email notifications about the progress of the approval, but you do not want them to be able to take action.
14. (optional) Select the **Notify Now** check box to send an immediate notification to the approver. This action can be repeated as necessary.
15. Click the **Save** button.
   The **Add Approvers** page refreshes. The approver is added to the **Existing Approvers** table.

Edit Document Approvers

To edit document approvers, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document approvers you want to edit.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document whose approvers you want to edit.
5. Follow steps 4 – 6 of the Edit Project Initiation Request Approvers instructions set.

Remove Document Approvers

To remove document approvers, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document approvers you want to remove.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document whose approvers you want to remove.
5. Follow steps 4 – 6 of the Delete Approvers from a Project Initiation Request instructions set.

Take Action on a Document Approval Request

To approve, reject, or request a revision on a document, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document you want to take action on.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document you want to take action on.
5. Follow steps 4 – 6 of the Take Action on a Project Initiation Request instructions set.

Reactivate Approvals on a Document

To allow a user to re-submit a document for approval, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document approvals you want to reactivate.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document whose approvals you want to reactivate.
5. Click the **Re-Activate Approval** button in the **Approvals** pane header.
   The document can now be re-submitted for approval.

Override Multiple Approvers

To override multiple approvers (for example, in the case that one or more approvers are unable to respond to an approval request), follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose document approvers you want to override.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the document whose approvers you want to override.
5. Follow steps 4 – 5 in the Override Multiple Approvers on a Project Initiation Request instructions set.

Open a File

To open a file, follow these steps:

1. Click the **Project Initiation** link in the menu.
   The **Project Initiation** module opens.
2. Select the **Project Initiation Request** whose file you want to open.
3. Select the **Documents** detail section in the **Detail Section** menu.
4. Select the file you want to open.
5. Click the **Open File** button in the toolbar on the right side of the **Summary** pane.
   The file opens in a separate tab.

Issues Resolved with this Release

Component	Summary
Leases	• Previously, when an Accounting Entry was submitted for approval, the status remained as **Locked**. • The Accounting Entry status now changes to **Submitted for Approval**.
Portfolio Center	• The ability to edit the **Reasonably Assured** flag and **Option Costs** can now be granted without granting permission to edit the rest of the lease.
Purchase Orders	• The **Description** and **Prepared By** fields now appear on the **Print** page.

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