

Approver Review and Project Creation

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Approver Review and Project Creation

After the project request has been accepted by the Receiver, the Receiver will complete filling in the remaining Project Details fields, including the Approvers field; the **Approvers** field does a lookup to the **Senior Managers** list in the Admin Area. For relevant approval stage processes, when all fields have required values, the **Send for Approval** switch will be enabled so it can be switched to **Yes**.

The screenshot shows the 'Acme JW NPI' project request form. At the top, there is a progress bar with stages: Draft, Accept (31 Min), Approve, and Create. The 'Accept (31 Min)' stage is currently active. Below the progress bar, there are tabs for 'Idea Details', 'Project Details', and 'History'. The 'Project Details' tab is selected, showing a grid of fields. The 'Send for Approval' switch is located at the bottom left of the form, currently set to 'No'.

Request Type	Project Name	Project Created
New Product Idea	Acme JW NPI	---
Submit Date	Project Sponsor	Project
8/12/2021	Jonathan Weisglass	---
Idea Number	Project Manager	Create Project
9001	Alex Hankin	<input type="checkbox"/> No
Receiver	Portfolio	
Jonathan Weisglass	Contoso Projects	
Approvers	Program	
Christine Chang Jonathan Weisglass	Business Projects	
	Project Template	
	New Product Intr...	

The Approver(s) will receive an email requesting an approval decision.

The screenshot shows an email notification from Microsoft Flow. The subject is 'New Product Idea for Approval'. The email is dated Thursday, August 12, 2021, at 3:39 AM. It is addressed to Christine Chang. The email content includes the following information:

- Created by Donal McCarthy <donal@bw[redacted].com>
- Requested for Meghan Browne <meghan@bw[redacted].com>
- Date Created: Wednesday, August 11, 2021 9:39 PM
- Link: 9001 Acme JW NPI

The email body text reads: 'Meghan has submitted a New Product Idea: 9001 Acme JW NPI for you to Approve. Please review the item and decide on a course of action. Whatever you decide, please ensure to supply feedback in the comment box below. Also, see the History tab on New Product Idea: 9001 Acme JW NPI for previous comments and history.'

At the bottom of the email, there are three buttons: 'Approved', 'Back to Draft', and 'Rejected', each with a dropdown arrow.

Note If there are multiple Approvers listed in the project request, all must approve the

request before it is settled as Approved.

If the request is fully approved, the request form will be updated accordingly, and an email will be sent to all relevant users. A project will then automatically get created and will be based on the associated requested template.

If a [Content Template](#) is associated with the chosen Project Template, the duration of the project creation process will depend on the number of child rows (Tasks, Issues, Risks, etc.) present in the project that is getting created.

Read-only This record's status: Inactive

Acme JW NPI
Request · New Product Idea

Project Request Level 2
Completed in 3 hours

Acme JW NPI Name | Project Created Request Status | Meghan Browne Requestor

Draft | Accept | Approve | **Create Project**

Idea Details | **Project Details** | History

Request Type	New Product Idea	Project Name	Acme JW NPI	Project Created	8/12/2021
Submit Date	8/12/2021	Project Sponsor	Jonathan Weisglass	Project	Acme JW NPI
Idea Number	9001	Project Manager	Alex Hankin	Create Project	<input checked="" type="checkbox"/> Yes
Receiver	Jonathan Weisglass	Portfolio	Contoso Projects		
Approvers	Christine Chang Jonathan Weisglass	Program	Business Projects		
Send for Approval	<input type="checkbox"/> Yes	Project Template	New Product Intro...		



Project Created

DM Donal McCarthy
Thu 8/12/2021 3:51 AM
To: Meghan Browne
Cc: Jonathan Weisglass; Jonathan Weisglass; Christine Chang; Alex Hankin

Dear Meghan,

The [New Product Idea 9001 Acme JW NPI](#) you submitted has been approved and a Project has been created. Please see the table below for the request history.
Thank you for your request.

Stage	User	Response	Comments	Date
Draft	Meghan Browne	Submitted	Request Submitted	Thursday, August 12, 2021 1:35 AM
Accept	Jonathan Weisglass	Approved	Thank you for submitting this request, it is approved.	Thursday, August 12, 2021 1:54 AM
Approve	Jonathan Weisglass	Approved	This is approved	Thursday, August 12, 2021 2:47 AM
Approve	Christine Chang	Approved	I approve this request	Thursday, August 12, 2021 2:47 AM
Create Project	Jonathan Weisglass	Project Created	Project Created	Thursday, August 12, 2021 2:51 AM



Acme JW NPI
Project - New Product Introduction

Alex Hankin Project Manager | Business Projects Program | Health | 6/10/2021 Current Finish

New Product Introduction Active for less than one mi... < Business Case (< 1 Min) Development Scale-Up Launch Standard Product

Charter Team Stages Gantt My Work Status Documents Issues Risks Project Settings

Name	Acme JW NPI	Portfolio	* Contoso Projects	Project Number	9001
Project Manager	* Alex Hankin	Program	* Business Projects	Source Request	Acme JW NPI
Project Sponsor	* Jonathan Weisglass			Teams Channel	---
Project Type	* New Product Idea	Objectives	---		
Description	Widgets that do amazing things	Out of Scope	---		

Note The Project Request "Approval Date" value uses a time zone independent UTC date; the same date value will be displayed for all users irrespective of time zone.