

Conditional budget approval via Dispatcher

 help.fractal.com/hc/en-us/articles/45140901665933-Conditional-budget-approval-via-Dispatcher

The **conditional budget approval** feature through the dispatcher allows the configuration of dynamic rules for assigning approvers, based on specific conditions such as location, specialty, and the amount of the work order. These rules enable the system to automatically assign one or more responsible approvers, who will receive notifications and must individually validate the approval.

The workflow does not allow tasks of the order to be executed until all approvers have given their approval. This helps improve financial control, facilitates traceability, and offers a flexible way to manage budgets, adapting to the organization's structure.

Process Configuration:

To use this feature, the user must configure the process by following these steps:

1. **Configure a rule in the Dispatcher:**

For the corresponding creation of the dispatcher, select the following options for each field:

- Module - Tasks
- Submodule - Budgets
- Event - New Budget
- Description - Identification of the dispatcher

Dispatcher

2

AI

New Budget Approval

Save

Enabled

Information
You have pending changes to save!

General

Terms

Actions

Module
Work Management

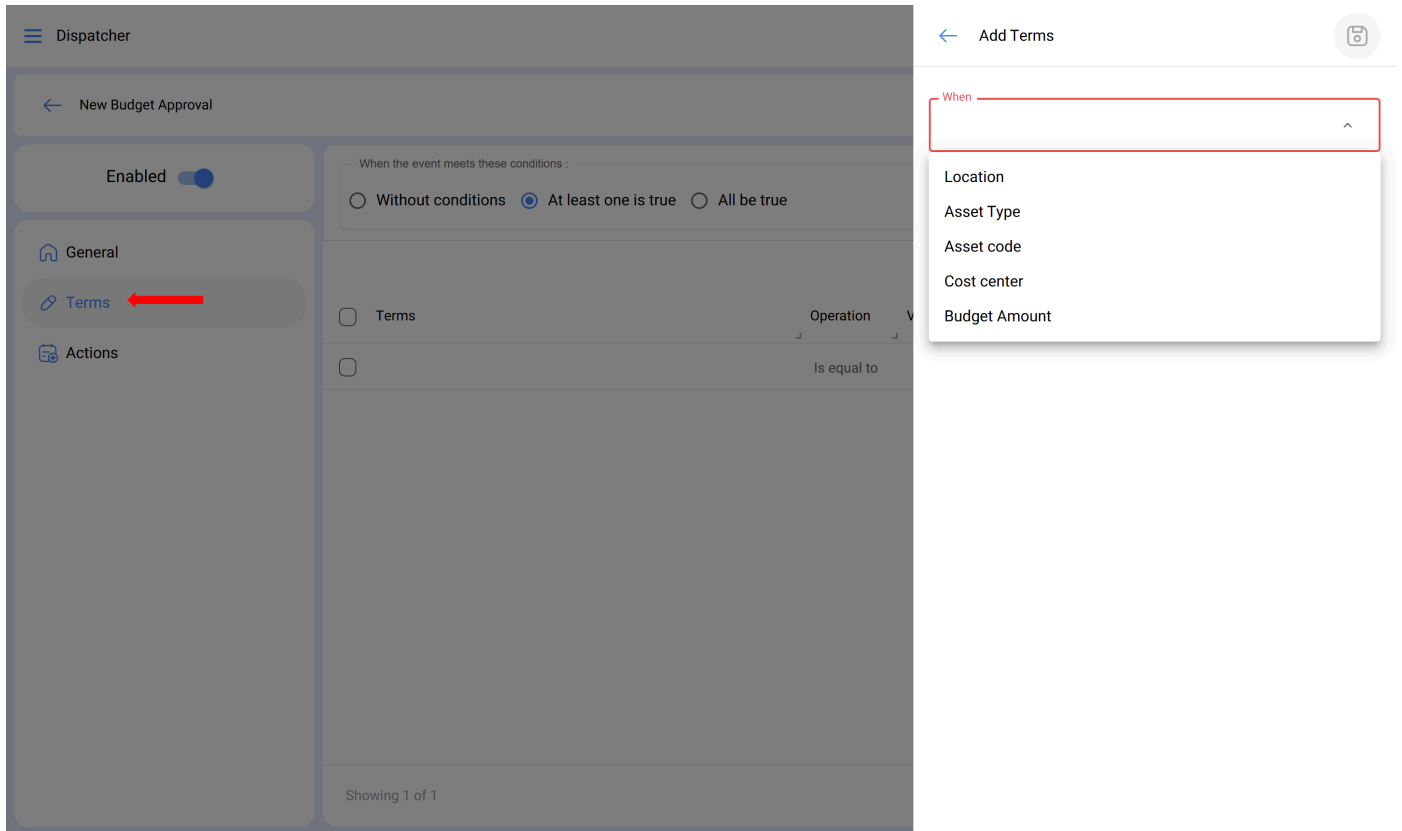
Submodule
Budgets

Event
New Budget

Description
New Budget Approval

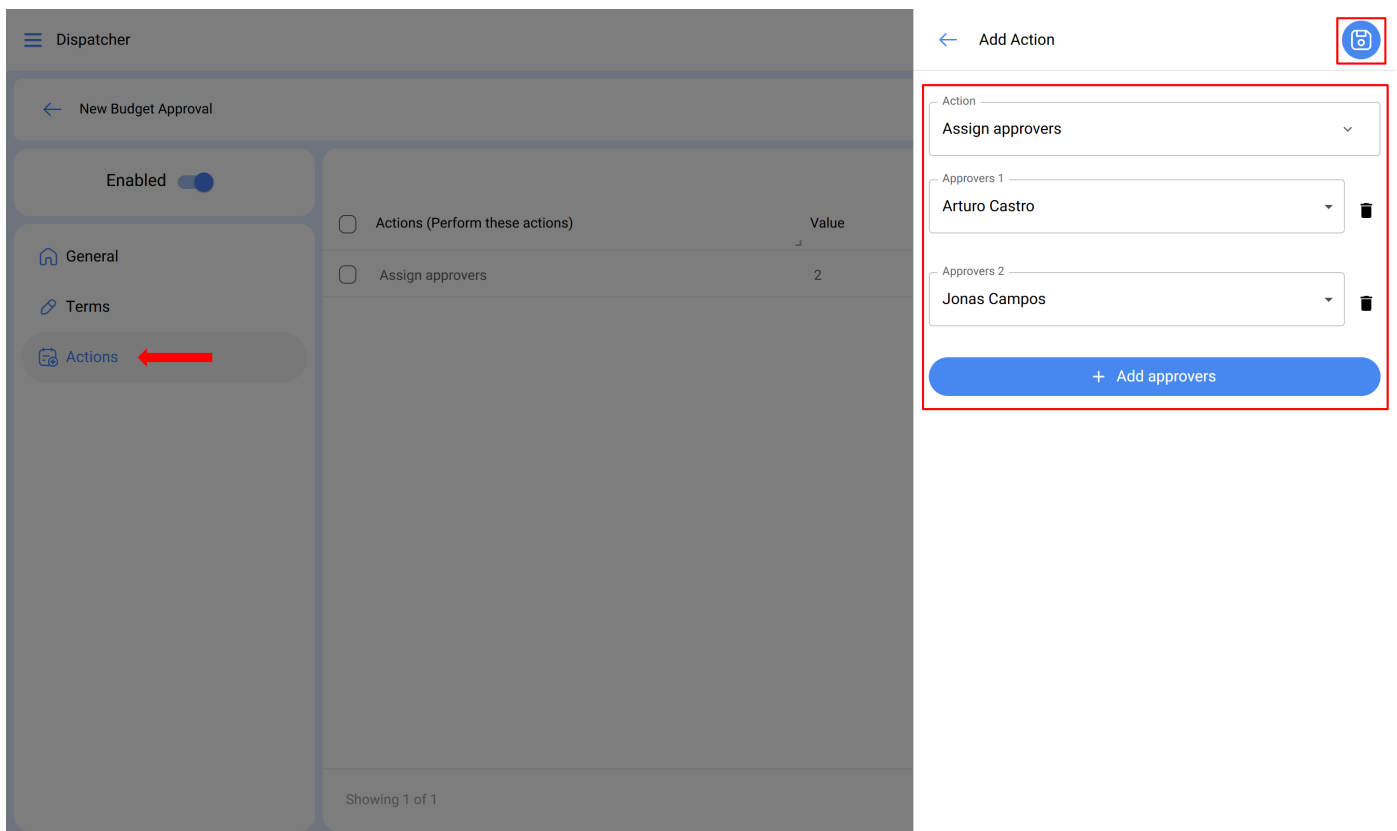
2. Define the operational conditions as needed, for example:

- **Location:** Set the condition related to the work location.
- **Type or specialty of the work:** Define the specialty associated with the work order.
- **Budget amount:** Set the ranges or specific values that will determine the approval limits.



3. Assign approvers:

In the **actions** section, select one or more users to be assigned as approvers.



Make sure to validate and save the information to complete the dispatcher configuration.

The screenshot shows the 'New Budget Approval' configuration page in the Dispatcher interface. The page is titled 'New Budget Approval' and has a 'Save' button in the top right corner. On the left side, there is a sidebar with a toggle switch for 'Enabled' (which is turned on) and three menu items: 'General', 'Terms', and 'Actions'. The main content area contains four configuration fields: 'Module' (set to 'Work Management'), 'Submodule' (set to 'Budgets'), 'Event' (set to 'New Budget'), and 'Description' (set to 'New Budget Approval').

Approval flow

Once the rule is configured, the system will activate the approval flow when a **WO** is created that meets the predefined conditions.

An email notification will be sent to each approver.

New budget in Fractal

Hi!

A new budget has been created in Fractal.

WO: OT-767-MTTO

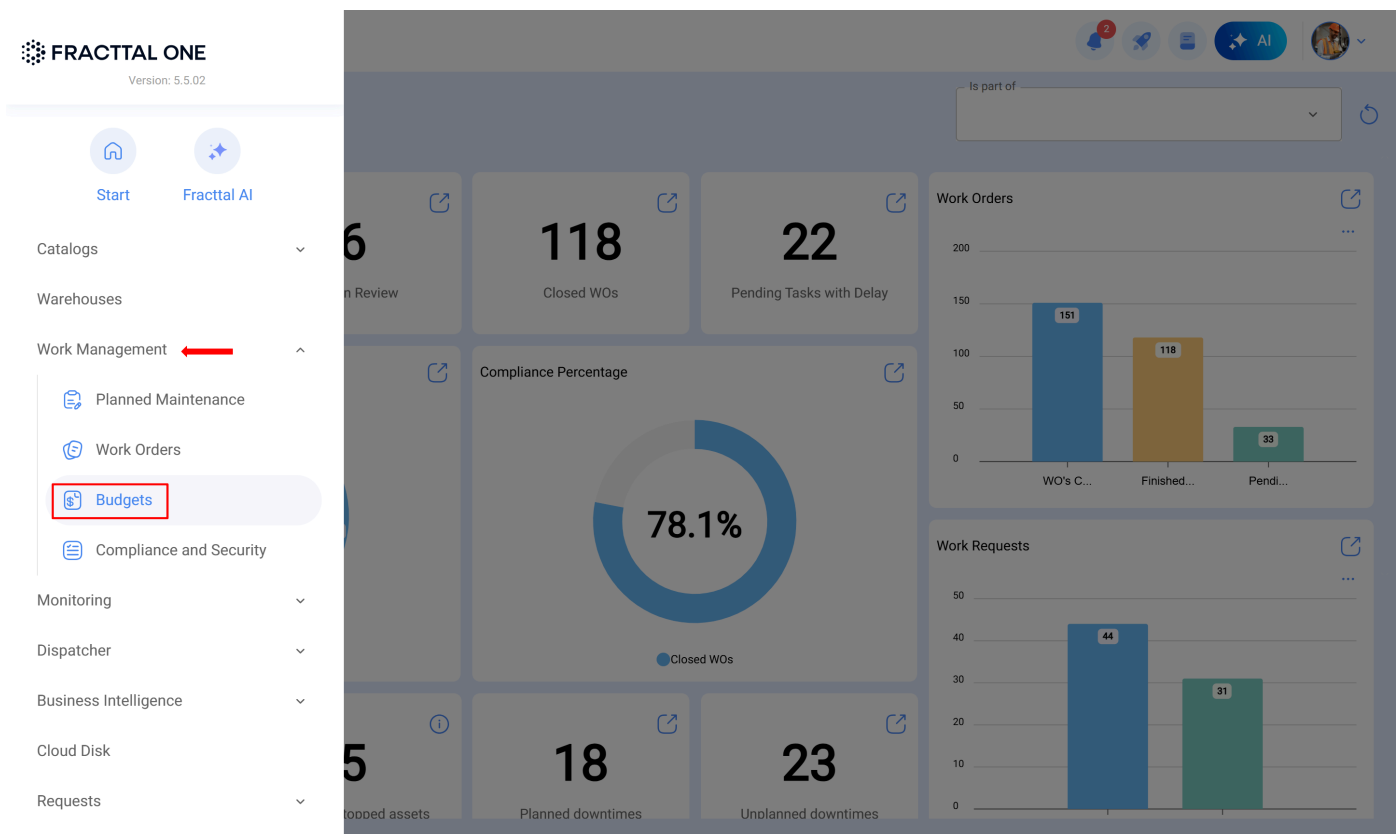
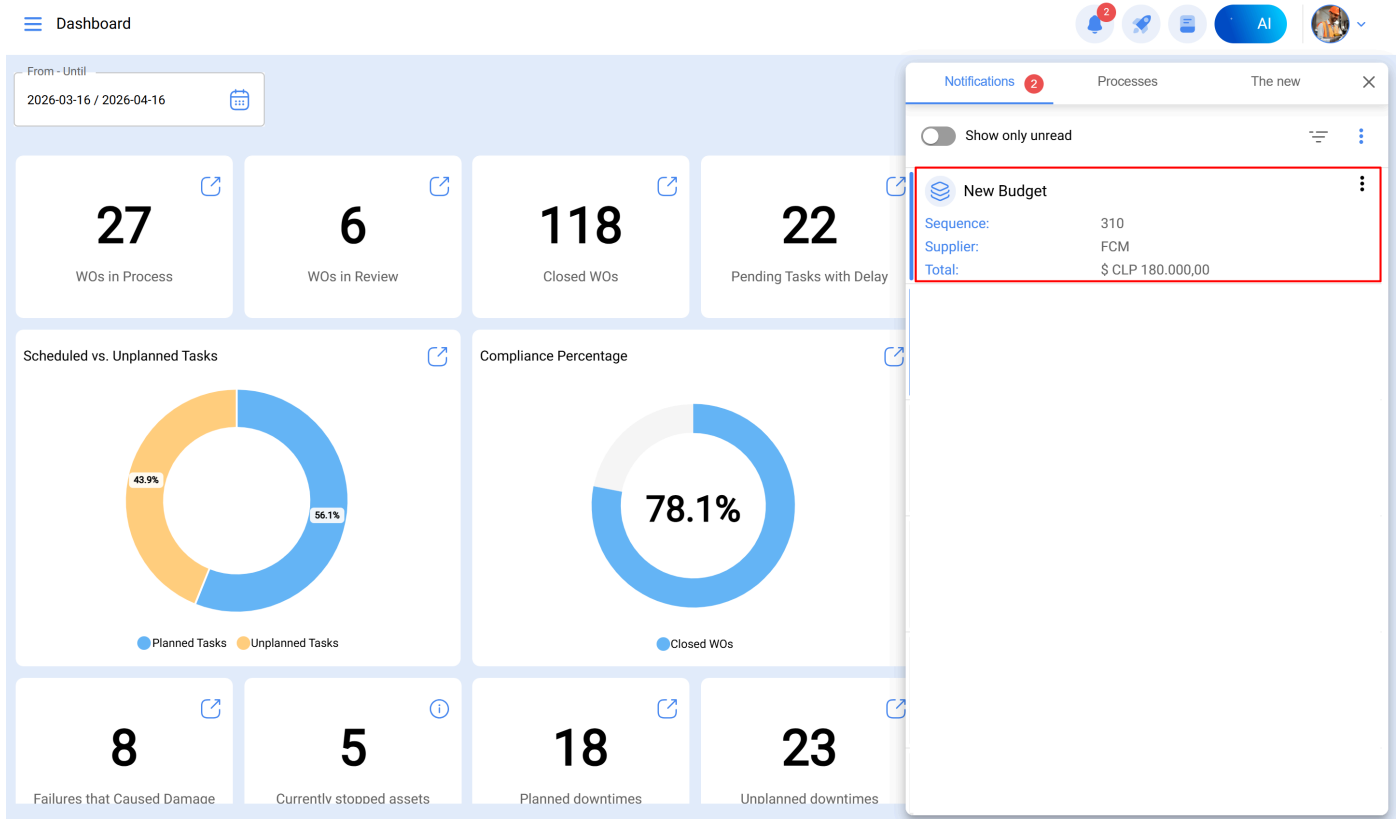
Asset: High-Pressure Air Compressor

Reference:

You can manage the budget by entering the module: [Tasks > Budgets](#).




[Go to Budgets](#)


The defined approvers will receive a notification and must access the **Budget** module to complete the validation.



Upon accessing the module, you will be able to see the following:

Asset: High-Pressure Air Compressor ✕ 🔄 🔍 🔗 ⋮

Asset	Third Party	Sequence	Cost center	Status	Approved by	Note Status
High-Pressure Air Compressor	FCM	310		 TO BE APPROVED		
High-Pressure Air Compressor ...	ABB	293		 APPROVED	Marcelo Campos	Aprobado, favor proceder.

Showing 2 of 2 

- All relevant information about the Work Order, details of the associated asset, and cost center.
- The **list of approvers**.
- The **status** of each (Pending / Approved).
- Notes left by the approvers

By pressing the “**Approve**” button, the following panel will appear:

<input type="checkbox"/>	Work Order	Asset	Third Party
<input type="checkbox"/>	OT-767-MTTO	High-Pressure Air Compressor	FCM
<input type="checkbox"/>	OT-761-MTTO	MONTACARGAS	DANIEL YAÑEZ



Approve budget



Work Management
Budgets

Asset: High-Pressure Air Compressor

	Work Order	Asset	Third Party	Sequence	Cost center
<input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	OT-767-MTTO	High-Pressure Air Compressor	FCM	310
<input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	OT388-MTTO	High-Pressure Air Compressor ...	ABB	293

Showing 2 of 2

← Approvers

You can only approve once
Your approval will be registered definitively and cannot be modified.

Ramon Toro **PENDING**

Notes

Diego Perez **PENDING**

Notes

Jonas Campos **PENDING**

Notes

Each approver must individually confirm their approval. The work order will only be enabled for execution once all approvers have given their approval.

Work Management
Budgets

Asset: High-Pressure Air Compressor

	Work Order	Asset	Third Party	Sequence	Cost center
<input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	OT-767-MTTO	High-Pressure Air Compressor	FCM	310
<input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	OT388-MTTO	High-Pressure Air Compressor ...	ABB	293

Showing 2 of 2

← Approvers

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Ramon Toro **PENDING**

Notes

Diego Perez **PENDING**

Notes

Jonas Campos **PENDING**

Ok - budget approved

To complete the budget action, all approvers must have completed this same process, and only then will the view show the status as **APPROVED**.

Work Management
Budgets

Search...

Work Order: OT-760-MTTO

Third Party	Sequence	Cost center	Status	Approved by	Note Status
FCM	308		APPROVED	2 de 2	Ramon Toro: Aprobado 11 Jonas Campos: Aprobado 22