

Veritas 2.0 User Guide



UAT Touchpoint Feedback

Chunk into gate 1, 2, 3... vs 4, 5, 6

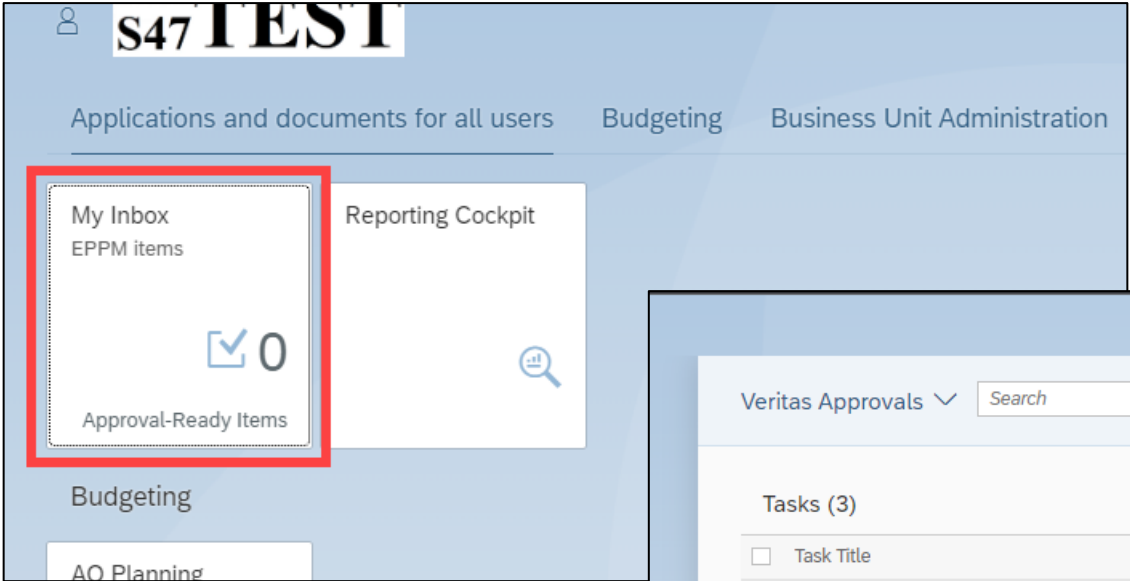
- Emphasize what data is required up front vs later one

PMs not as concerned with details on each page

Topics Covered

- Veritas 2.0 Intro and Overview
- What's New?
 - My Inbox
 - Add Approver (BU Admin)
- What's Different?
- Project Management
- Approvals
- Add New Approver
- Manage Delegates
- Miscellaneous:
 - Logging onto System
 - One Time Setup Activities – Required by every user
- Appendix:
 - Phase/Funding Approval Details
 - What's required, who is notified, etc

What's New? Fiori Launchpad and Approval Inbox



My Inbox ▾

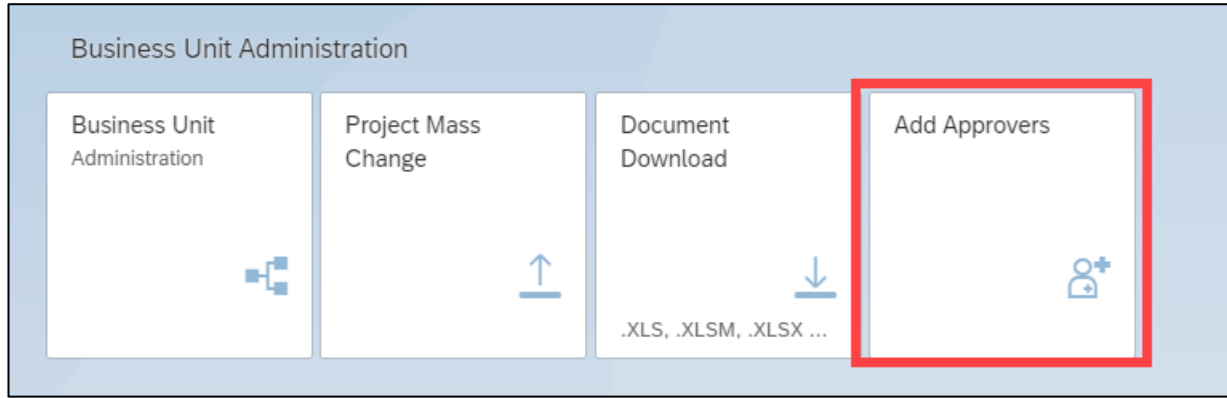
Veritas Approvals ▾ Search

Show Filter Bar Clear Filters (1) Go

Tasks (3)

☐ Task Title	Status	Priority	Created By	On Behalf Of	Created On	Due On
☐ Forecast testing: Pre-CER approval	Ready	Medium	Workflow System		Oct 12, 2023, 7:54 AM	>
☐ SIT Testing 10092023 P2: Add DOA Approver	Ready	Medium	Workflow System		Oct 9, 2023, 2:46 PM	>
☐ SIT Testing 10092023: Add DOA Approver	Ready	Medium	Workflow System		Oct 9, 2023, 12:10 PM	>

What's New? BU Admin - Add New Approver



The screenshot displays the 'Add Additional Approver' form within the 'HUNTSMAN s47TEST' application. The form is titled 'Add Additional Approver' in the top right corner. It contains the following sections and fields:

- Execute**: A section header.
- Workflow Details**: A section header.
- Form Fields**:
 - * Project ID:** A text input field with a small icon to its right.
 - * New Approver:** A text input field.
 - * Tier:** A dropdown menu currently showing '?'. A small downward arrow icon is to its right.
 - * Sequence:** A text input field.
- Processing Mode**: A section header.
- Test Run?**: A checkbox that is checked, located below the 'Processing Mode' header.

What's New? Exchange Rates

- Rates will be stored for each Phase/CER
 - Rates will be pulled from the monthly rate (P rate)
 - Rate will be stored for easier reporting purpose
 - Calculated USD is also stored
 - Exchange Rate will be shown on the Phase/CER Page in the header section
 - Rates will only be updated while phase/CER page is in Draft status
 - Once submitted for approval, rate cannot be changed
- The exchange rate will be saved one last time on Submit of the CER/Gate
- Rate will not be updated while BU Admin makes a minor change during approval
- Supplemental CER Required logic will be governed by LC AND USD



What's Different? Project Dashboard

Additional Fields to add to the Project Dashboard list

- Current Approver(s)
 - Lists all the users that have an approval decision task in their My Inbox for this project.
- Current Phase for each project will be added as an available column for display and filter

Additional Navigation on the Project Dashboard list

- Approval Task
 - When you select a project in which you are one of the current approvers, this button will open the approval task in the My Inbox application for that project

The screenshot shows the Project Dashboard interface. At the top, there's a header with a user profile, navigation icons, and the text 'S47 TEST'. Below the header is a 'Project Dashboard' dropdown and a search icon. A 'Navigator' section follows. Below that is a filter bar with the text 'SIT Round 2 *' and a dropdown. The filter bar contains several input fields: 'Project ID:' with a value 'P300*' and a refresh icon; 'Project Name:' with a refresh icon; 'Active Stage:' with a value '2 Items' and a refresh icon; 'Active Stage Status:' with a refresh icon; and 'Project Mngr. Name:' with a refresh icon. A red arrow points to the 'Project Mngr. Name:' field with the text 'Available for filtering'. To the right of the filter bar are buttons for 'Hide Filter Bar', 'Filters (2)', and 'Go'. Below the filter bar is a section titled 'Items (1) | Project with Status *' with a dropdown. To the right of this section are buttons for '+ New Project', a settings icon, a list icon, a dropdown, and a refresh icon. Below this is a table with the following columns: 'Project ID', 'Project Name', 'My Inbox', 'Active Stage', 'Active Stage Status', and 'Approvers'. The table has one row with the following data: 'P300-23001', 'Project Smoke Test 01', a blue envelope icon, 'Idea', 'Draft', and 'Brian Snyder'. A red arrow points to the blue envelope icon in the 'My Inbox' column.

Project ID	Project Name	My Inbox	Active Stage	Active Stage Status	Approvers
P300-23001	Project Smoke Test 01		Idea	Draft	Brian Snyder

What's Different? Create Project

- Removed Funding Status field
- Project Sponsor is no longer free text; must select a user.
 - Project Sponsor – any user with Veritas account vs Project Manager – must have PM role and Plant assignment
- Added Project Long Name. Max 100 characters.
- Required Project Complexity
- BU Admins to make Project Category 3 required – used in approval routings

The screenshot shows the 'Create Project' form in the PLATINUM DB CONSULTING application. The form is titled 'Create Project' and is located under the 'Project' menu. It contains several input fields and dropdown menus for project details. The fields are organized into two columns. The left column includes: *Project Name (text input), *Business Division (dropdown), *Plant Code (text input with a copy icon), *Project Category (dropdown showing 'Null'), Project Category 2 (dropdown), and Project Category 3 (dropdown). The right column includes: Project Long Name (text input), Site Classification (dropdown), Unit (dropdown), Project Manager (text input with a copy icon), and *Project Sponsor (text input with a copy icon). At the bottom, there is a 'Project Description' section with a large text area. A 'Save' button is located in the bottom right corner.

PLATINUM DB CONSULTING

Project

Project

Create Project

*Project Name:

Project Long Name:

*Business Division:

*Plant Code:

Site Classification:

*Project Category:

Unit:

Project Category 2:

Project Manager:

Project Category 3:

*Project Sponsor:

Project Description

Save

What's Different? Project Overview

■ New:

- CII Lifecycle – navigational chevrons
- Workflow Log – all phases and funding requests

■ Read Only:

- Executive Summary (Project Description)
- Gate Actual Dates
- Estimate
- Sanction
- Business Benefits

■ Removed:

- Portfolio Input (moved to Feasibility page)
- Gate Planned and Actual Status

■ Modified:

- Funding Status – read only. Updated by BU Admin via Mass Update.
- Project Sponsor – must select named user
- PIR Required logic – manual by BU Admin
- Attachments – additional columns for Gate and Sanction
 - All phases and funding requests

Project Overview

ADM Testing Idea
US49-23019

Actuals + Forecast: \$0 Total Actuals till closed Period: \$0 Current Year AFC: \$0
Actuals YTD: \$0 Total Forecast Remaining: \$0 Current Year Forecast Remaining: \$0

Idea Feasibility Concept Detailed Scope Detailed Design Construction Commission Closure

IDENTIFIERS KEY ATTRIBUTES ORGANIZATION ORIGINAL BUDGET GATES BUSINESS BENEFITS POST INVESTMENT REVIEW (PIR) MAPPED IO ATTACHMENTS APPROVAL LOGS

Project ID: US49-23019 CER Number: Supplemental CER Required: ☐

Local Reference: Master Project: Included in Next Budget: ☐

KEY ATTRIBUTES

Key Attributes

*Project Name: ADM Testing Idea Forecast Done: ☐ Project Manager: Sarah Kim Substitution Reference(s):

Project Long Name: *Project Category: B (Business Development) *Project Sponsor: ZV_APPROVE03 *Project Complexity: Medium

Project Category 2: Global IT Involved: ☐

*Funding Status: Portfolio Input Project Category 3: Project Category 3 Corporate IT Lead:

Project Benefits

*Improvement Type: Cost Avoidance Asset Risk Value (\$): 0

Refresh Save

No Changes

- Project Budgeting
- Project Forecasting
- Non-SAP Actuals
- Internal Order Integration
- Reports – fields are adjusted but layouts have not changed
- Mass Update Utility – fields adjusted

Create Project

T

Veritas Project ▾

Project

Create Project

*Project Name:

Gate 0 Idea testing

*Business Division:

PU - Polyurethanes ▾

*Plant Code:

Huntsman (Germany) GmbH

*Project Category:

D (Improvements) ▾

*Project Category 2:

Downstream - Differentiate & Outpace Competition ▾

*Project Category 3:

Global Excellence Team ▾

*Project Complexity:

Medium ▾

Project Description:

Additional description here

Project Long Name:

Additional 60 characters for long name

*Site Classification:

European, Middle-East, Indian Subcontinent, Africa sites ▾

*Unit:

Polyester Polyol Plant

Project Manager:

Sarah Kim

*Project Sponsor:

Sarah Kim

*Improvement Type:

Direct Fixed Cost Reduction

Project Long Name and Project Manager are not required fields on create or Project Overview (as denoted by *). They will be required when Idea is submitted so it's best to fill them in as early in the process as possible.

Veritas Approval Process

▪ Trigger the Approval

- Project Manager action (or anyone with Edit authorization for the project)
- System validates all required data needed for Gate/Funding then starts the approval process
 - Exception: Concept w/o Phase 1 CER option does not require any fields.
- The status of the Gate decision point will be set to Routing for Approval

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix in combination with the Local and Central Approvers maintained by BU Admins

▪ Finish the Approval

- **Result: Approved**
 - Gate Actual Date will be set to the current date
 - The status of the Gate will be set to Approved
 - The long texts will be copied to next Gate if the text has not been maintained yet
- **Result: Rejected**
 - The status of the Gate decision point will be set back to Draft
 - Any prior approvers who approved before the rejection occurred will be notified.

▪ Hold the Approval (BU Admin)

- Triggers hold process

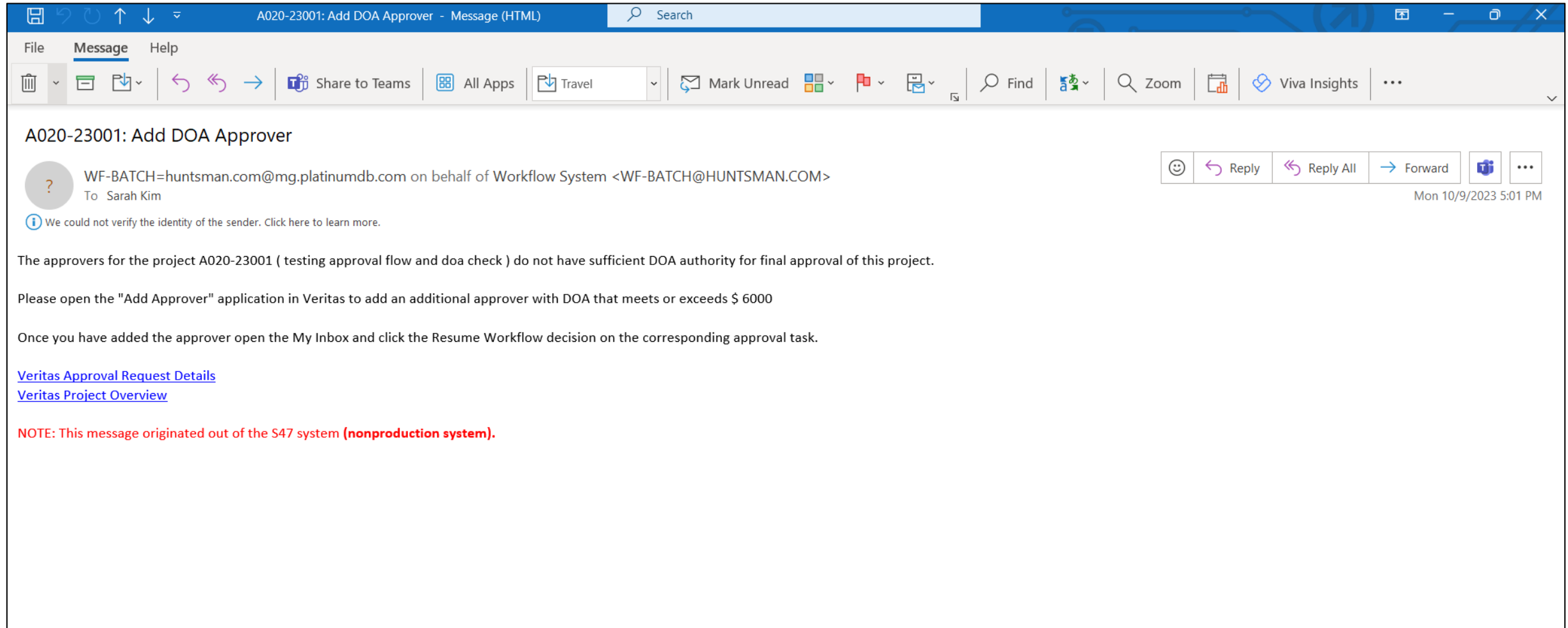
▪ Ask Questions (Any approver)

- Notification to Project Manager

Veritas Approval Process

- CER number is generated after Phase 1 CER or Full CER is approved.
- Funding Status on Project Overview is adjusted as funding requests are submitted and approved.
- Notifications after Phase 1 or Full CER are also sent to KL team, as well as SCC and user who submitted the request.
- If the DOA level is not satisfied the approval will be routed to the GCC. The GCC will be asked to include an additional approver to the workflow process with the appropriate DOA level. Example next slide.
- The one exception to the DOA is that the CEO has authority up to 999,999,999 instead of the 10,000,000 defined in the DOA table.
 - For capital value above \$10 million, it is assumed that the CEO will seek Board approval before approving.
- DOA data is read from Atlas SAP system during active approval workflow.

Notification to GCC



What's different from CER?

- Approvals in CER → Veritas Approvals
- CER was only funding approvals → Veritas is both funding and phase approvals
- Consolidated approver rules and routings

CER Form

CER: SLIC restructure with HPS project - IBM Notes

File Edit View Create Actions Section Tools Window Help

Open [icon] [icon] [icon]

Home x RSS Database - RSSBy RSS Number Outl... x Delegation of Authority x Global CAPEX System x Replication and Sync x CER: SLIC restructure with HPS proje... x

Close Modify routed CER Approve / Reject Show Comments Show Approval Route Tools

Help index

Global CAPEX System - COMPANY SECRET

CER: SLIC restructure with HPS project

Requested by: Dave Yang

Request date: 10-Mar-2022

Last modified on: 03-Jun-2022 09:02

Status: Submitted for Central review

Current approval level: Full

Approvers

Ben de Jong

He Wang

Arend Jan Zeeuw

Max J Van der Meer

Bart van Roozendaal

Tony P Hankins

Louis Kaiser (EHS)

Pending

Max J Van der Meer

Bart van Roozendaal

Tony P Hankins

Current approvers

Arend Jan Zeeuw

Processed by

Ben de Jong

Louis Kaiser

He Wang

Business*: Polyurethane

Location: Caojing-CN

SCC name: Dave Yang

Region: APAC

Local ref. no:

CER no:

Project ref. no:

Veritas project no: MP909-22001

Capital category: B - Business Development

Plant / Function: MDI

Project Sponsor: He Wang

Project Manager: He Wang

Accountable Huntsman: Dave Yang

Project Manager: Dave Yang

SAP Project Admin: Yvonne Tan

Is the project in the Capex budget? Yes No

Global Capex Budget Reference No.: 2938.0 USD (K)

What is the budgeted amount?

How will project be funded /explanation?

Is the project funded 100% by Huntsman? Yes No

Will the project engage IT support or physical IT assets? Yes No

FM Global Indicator *: Yes No

Is this CER for a Capital Spare project? : Yes No

PSM Indicator *: Yes No

Function Allocation

Allocation type: SBU

Allocation: APAC Global Operations

Sub Allocation:

Additional Local Approvers:

Additional Central Approvers:

Corporate EHS Authoriser: Louis Kaiser

CER Approval Routes

FileEditViewCreateActionsToolsWindowHelp

Open

HomeRSS Database - RSSBy RSS Number Out...Delegation of AuthorityGlobal CAPEX SystemReplication and SyncCER: SLIC restructure with HPS proje...Approval route: SBU IFS - Kings Lynn...Approval route: SBU by Capital Categ...

EditClose

Approval Route

Business NameAdvanced Materials

Route type:

Local Approval

Central Approval

Expenditure up to:500 USD (K)

Allocation type:SBU by Capital Category

Allocation:Supply Chain - R, E1, E2, S1, S2 & IM

Routing Method:

Serial

Parallel

1	Steen Weien Hansen/SG/PU/HUNTSMAN	CER Authorization - \$0
2	Harald Wiedemann/BE/ADVM/HUNTSMAN	CER Authorization - \$500,000
3	James Huntsman/US/ADVM/HUNTSMAN	CER Authorization - \$0
4	Andre Genton/BE/ADVM/HUNTSMAN (Approves only after all others have)	CER Authorization - \$0
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

Final Closure by:

CER Form – Veritas

<

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547

TEST

Veritas Project

🔍

Phase/Gate Information

Stage: Detailed Scope

CN52-23001 UAT Demo 1 10122023

Project

Status: Routing for Approval

Actuals + Forecast: CN¥0

Total Actuals till closed Period: CN¥0

Current Year AFC: CN¥0

Project Category: B (Business Development)

Actuals YTD: CN¥0

Total Forecast Remaining: CN¥0

Current Year Forecast Remaining: CN¥0

Idea

Feasibility

Concept

Detailed Scope

Detailed Design

Construction

Commission

Closure

SANCTION

DATES

ESTIMATE

SPEND FORECAST

LONG TEXT

QUESTIONS

BUSINESS BENEFITS

ATTACHMENTS

APPROVAL LOGS

Capital Local Currency

Capital USD

OPEX Local Currency

OPEX USD

Full CER Request (excl CI)

CN¥900,000

125,259

CN¥5,000

696

Estimated Capitalized Interest:

CN¥75,000

Capitalized Interest Project:

DATES

Gate

Planned Date

Forecast Date

Actual Date

Gate 3 Detailed Scope

11/06/2023

Gate 6 Commission

11/07/2023

11/16/2023

Gate 7 Closure

11/08/2023

02/14/2024

ESTIMATE

Capital Local Currency

Capital USD

OPEX Local Currency

OPEX USD

Accuracy

PDRl

Gate 3 Detailed Scope Estimate

CN¥900,000

125,259

CN¥5,000

696

10%

0

SPEND FORECAST

Spend Forecast

Q1 USD

Q2 USD

Q3 USD

Q4 USD

Y1

125,259

0

0

0

Y2

0

0

0

0

Y3

0

0

0

0

LONG TEXT

Project Description

Refresh

Hold Approval

Veritas Project Overview

Project Overview

Forecast testing

ARS2-23001

Forecast

Actuals + Forecast: ARS 0

Total Actuals till closed Period: ARS 0

Current Year AFC: ARS 0

Actuals YTD: ARS 0

Total Forecast Remaining: ARS 0

Current Year Forecast Remaining: ARS 0

Idea

Feasibility

Concept

Detailed Scope

Detailed Design

Construction

Commission

Closure

IDENTIFIERS

KEY ATTRIBUTES

ORGANIZATION

ORIGINAL BUDGET

GATES

BUSINESS BENEFITS

POST INVESTMENT REVIEW (PIR)

MAPPED IO

ATTACHMENTS

APPROVAL LOGS

Project ID:

ARS2-23001

CER Number:

Supplemental CER Required:

Local Reference:

Master Project:

Included in Next Budget:

KEY ATTRIBUTES

Key Attributes

*Project Name:

Forecast testing

*Funding Status:

Routing for Pre-CER

*Project Category 3:

Ethyleneamines

Corporate IT Lead:

Project Long Name:

project long name

Forecast Done:

Project Manager:

ZV PRJ_MGR

Substitution Reference(s):

*Project Category:

B (Business Development)

*Project Sponsor:

ZV_APPROVE03

*Project Complexity:

Easy

*Project Category 2:

Americas Manufacturing

Global IT Involved:

Project Benefits

*Improvement Type:

Cost Avoidance

Asset Risk Value (\$):

0

Executive Summary

Project Description

Refresh

Veritas Approval Logs

APPROVAL LOGS

Approval Type	Current Status	Created On	Created By	Approver	Approver Tier	Approver Seq. No.	Decision	Action Date	Action By	Comments
Idea Gate	Complete	10/12/2023	Sarah Kim	ZV PRJ_MGR	Local	1	Approved	10/12/2023	ZV PRJ_MGR	forecast testing approval
Feasibility Gate	Complete	10/12/2023	Sarah Kim	ZV PRJ_MGR	Local	1	Approved	10/12/2023	ZV PRJ_MGR	
Pre-CER	Pending	10/12/2023	Sarah Kim	ZV_APPROVE04	Local	3				
Pre-CER	In Queue	10/12/2023	Sarah Kim	ZV_APPROVE05	Local	4				
Pre-CER	In Queue	10/12/2023	Sarah Kim	Brian Snyder	Central	1				
Concept	Not Started			Stéphane Pressé	Central	1				
Concept	Not Started			Soundar Venkat	Central	2				
Concept	Not Started			Steve Hanshaw	Central	3				

 Refresh

Processing Approvals

- Receive approval request
- Review details
- Ask Question
- Approve
- Delegation/Substitute



Email Notification

CO51-23001: Pre-CER awaiting approval - Message (HTML)

File Message Help

Share to Teams All Apps Travel Mark Unread Find Zoom Viva Insights

CO51-23001: Pre-CER awaiting approval

WF-BATCH=huntsman.com@mg.platinumdb.com on behalf of Workflow System <WF-BATCH@HUNTSMAN.COM>
To Sarah Kim

Thu 10/12/2023 8:24 AM

We could not verify the identity of the sender. Click here to learn more.

Dear Approver,

Below are the project details waiting for your approval. Please review and approve as soon as possible.

Division:	PP - Performance Products
Site Name:	Bogota FDC & Warehouse
Project ID:	CO51-23001
Project Name:	long name for my project - this will be required later during Idea
Project Category:	B (Business Development)
Why Pre-CER is required:	some text
Project Description:	some text
Adjusted Budget CY(LC):	0,00
Estimate (Capex/USD):	122,00
Sanction Request (Capex/USD):	122,00
NPV Loss (USD):	0
NPV (USD):	0
IRR %:	
Payback (Months):	
PI:	.00

To Approve or Reject the approval work item, please open the approval task in Veritas here: [My Inbox](#)

Questions about the project or the approval request can be submitted in Veritas here: [Approval Questions](#)

To approve the work item directly from e-mail, select the APPROVE decision here: [APPROVE](#)

NOTE: This message originated out of the S47 system (nonproduction system).

- Email notifications are sent to your @<corporatedomain>.com email address. However, if you do not use this address, then we can configure the system to send to your main email address, e.g., @corporatepartner.com
- However, to view your approval inbox or more project information in Veritas, you will need to log into the corporate VPN network as mentioned earlier.
- Currently, central approvers at Tier 3 or above (corresponding to DOA of \$0.5 million or higher) can approve via email (Offline approval).

My Inbox Link: Approval Task

My Inbox

Veritas Approval

Forecast testing: Pre-CER approval

[Workflow System](#)

Status: Ready
Priority: Medium

Created on Oct 12, 2023, 7:54 AM

i

Select one of the available decision options. This completes the processing of this step.

If you choose **Approve**, the approval workflow will continue to route the approval tasks to the next approver(s).
If you choose **Reject**, the approval workflow process will end, and the Project Manager will be notified.

Project Details:

Division:	PP - Performance Products
Site Name:	
Project ID:	AR52-23001
Project Name:	project long name
Project Category:	B (Business Development)
Adjusted Budget CY(LC):	0.00
Requested CER Amount(USD):	14.00

Questions about the project or the approval request can be submitted in the Veritas application here: [Approval Questions](#)

Additional Project Information:

- [Veritas Approval Request Details](#)
- [Veritas Project Overview](#)

Approve

Reject

Click links to view Request Details and Project Overview before asking questions

Approval Questions – Link from Email or Inbox Task

Approval Questions

Approval Questions Form

Freeport Waste Water recycle (N065-23010) Freeport Waster Water Recycle Facility

APPROVAL QUESTIONS

+ Approval Questions

Question	Submitted By	Submitted Date	Approval Type	Answer	Answered By	Answer Date
what is the timeline for implementation? Do we know the long lead items in the project?	Soundar Venkat	10/18/2023	Idea Gate	18 -24 months based on board approval and TCEQ; Long lead item is Rotary Kin	Soundar Venkat	10/18/2023

Refresh

Save

- The Approval Questions Form can be opened from a link in the Approval Email, Approval Inbox Task
- There will be a button on the CER or Phase page above the approval log section.
- Only enabled if Phase or CER status = Routing for Approval
- Anyone who is **current or future approver** of the current approval process can create a new question, which will be sent to the Project Manager by email.
- The **Project Manager, SCC or GCC** will have the ability to answer the question
 - Answers will be sent back by email to the person who submitted the original question.

Project Overview – Approval Questions

Project Overview

quick project
BR53-23001

Actuals + Forecast: R\$0
Actuals YTD: R\$0

Total Actuals till closed Period: R\$0
Total Forecast Remaining: R\$0

Current Year AFC: R\$0
Current Year Forecast Remaining: R\$0

Idea

Feasibility

Concept

Detailed Scope

Detailed Design

Construction

Commission

Closure

Forecast

IDENTIFIERS

KEY ATTRIBUTES

ORGANIZATION

ORIGINAL BUDGET

GATES

BUSINESS BE

GS

Approval Type	Current Status	Created On	Created By	Approved By	Comments
Idea Gate	Complete	10/12/2023	ZV PRJ_MGR	Sarah Kim	18/2023 Sarah Kim
Idea Gate	Pending	10/12/2023	ZV PRJ_MGR	Mikhail	
Feasibility	Not Started			Sarah Kim	
Concept	Not Started			Stéphane Pressé	Central 1
Concept	Not Started			Soundar Venkat	Central 2
Concept	Not Started			Steve Hanshaw	Central 3
Detailed Scope	Not Started			Stéphane Pressé	Central 1

Approval Questions

Refresh

- Also on the Project Details page above the approval log section.
- Visible by the BU Admin users and is shown regardless of the CER approval status.

Question Submitted Notification (Rec'd by Project Manager)

quick project: Question Submitted - Message (HTML)

Search

File

Message

Help

Delete

Archive

Move

Reply

Reply All

Forward

Share to Teams

All Apps

Travel

Mark Unread

Find

Zoom

Reply with Scheduling Poll

Viva Insights

quick project: Question Submitted

SK

skim=platinumdb.com@mg.platinumdb.com on behalf of Sarah Kim <skim@platinumdb.com>
To Sarah Kim

Reply

Reply All

Forward

Thu 10/19/2023 6:16 AM

The following question has been submitted by Sarah Kim . The question can be answered by opening the Approval Questions form for the Project or by clicking the link below.

Project ID:	BR53-23001
Project Name:	long name
Question:	When will we integrate the add approver into the UI?

[Veritas Approval Questions Form](#)

NOTE: This message originated out of the S47 system (nonproduction system).

Platinum DB Consulting, Inc.

8/21/2026

26

Question Answered

quick project: Question Answered - Message (HTML)

Search

FileMessageHelp

Share to Teams

All Apps

Travel

Mark Unread

Find

Zoom

Viva Insights

quick project: Question Answered

SKskim=platinumdb.com@mg.platinumdb.com on behalf of Sarah Kim <skim@platinumdb.com>
To Sarah Kim

Reply

Reply All

Forward

Thu 10/19/2023 6:23 AM

The Approval Question you submitted has been answered by Sarah Kim . Please see the answer below or by clicking the questions link below.

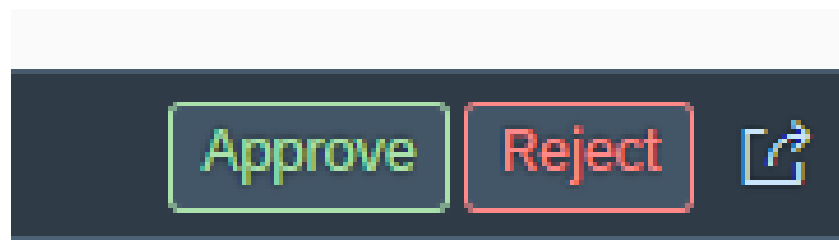
Project ID:	BR53-23001
Project Name:	long name
Question:	When will we integrate the add approver into the UI?
Answer:	This will most likely be done early 2024.

[Veritas Approval Questions Form](#)

NOTE: This message originated out of the S47 system (nonproduction system).

Completing an Approval Task

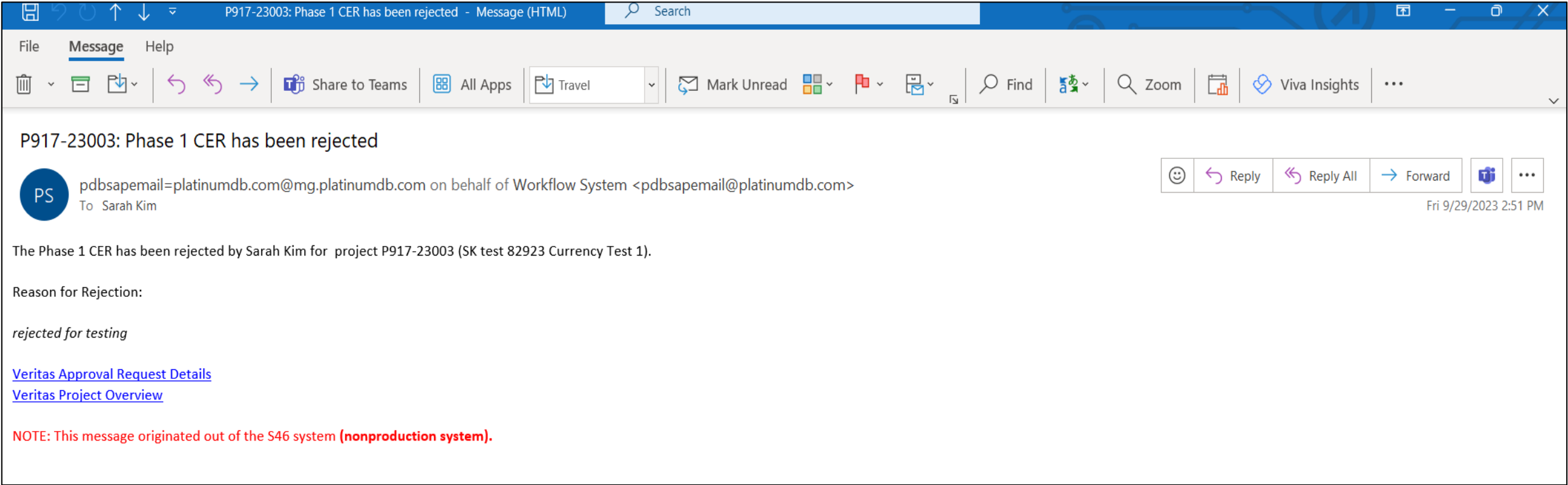
- The approver has 2 options when processing the Approval Decision Task within the My Inbox application
 - **Approve**
 - Sets the current work item to approved and moves on to the next sequence of approver(s) unless other approvers on the same parallel group have not approved yet.
 - Comments are optional
 - **Reject**
 - Sets the current work item to rejected
 - Ends the routing for that Gate or CER
 - Sets the Gate or CER back to Draft status
 - Comments are required
 - Reject email sent to: PM, prior approvers, and current parallel approvers



Approved Notification

[illegible]

Rejected Notification



Approval Task Reminders

■ Automated Reminder

- The system will check for overdue approval tasks each Friday
- The program will send the approver notification email again, with an additional line informing the approver that the task is Overdue
- The task is considered overdue if the day the program runs is $\geq$ the date that approval task was created + 7 calendar days
- The reminder program will support the ability to filter out projects to exclude them from sending reminder notifications.



Placing Approval on Hold – BU Admin

- When the Gate/CER is set to the On Hold status the BU Admin will have the ability to update the object (Gate/CER) being approved. The Gate/CER is still not editable by other users who do not have the BU Admin authorization.
- The Remove Hold button is now visible to the BU Admin on the Gate/CER that is currently set to On Hold. Clicking this button will open the work item inbox where the BU Admin enters their comment for the updates, and resumes the approval process and notifies prior approvers
- **Resume Workflow**
 - Comments are required
 - Sets the Hold work item to approved
 - Resumes the routing of the workflow to the remaining approver(s)
 - Notifies the approvers including the comment added by the BU Admin
- **Cancel Workflow**
 - Comments are required
 - The approval process ends, and the CER is returned to Draft
 - No notification sent even for prior approvers

Project Edited Notification

SK 08102023: has been edited - Message (HTML)

Search

FileMessageHelp

Share to Teams

All Apps

Travel

Mark Unread

Find

Zoom

Viva Insights

SK 08102023: has been edited

PS

pdbsapemail=platinumdb.com@mg.platinumdb.com on behalf of Workflow System <pdbsapemail@platinumdb.com>

To Sarah Kim

Start your reply all with:

Thank you!

Completed.

Received, thank you.

Feedback

The Feasibility Gate request has been edited for project A020-23014 (my project's long name is here).

Comment about the changes made by Sarah Kim:

updated planned date and project description

[Veritas Approval Request Details](#)

[Veritas Project Overview](#)

😊

Reply

Reply All

Forward

Wed 9/27/2023 2:26 PM

Add New Approver

Add New Approver

My Inbox
EPPM items

Must click into Veritas
Inbox application
before the buttons will
be visible

Approval Delegation

PLATINUMDB
CONSULTING

Manage My Substitutes ▾

Planned Unplanned

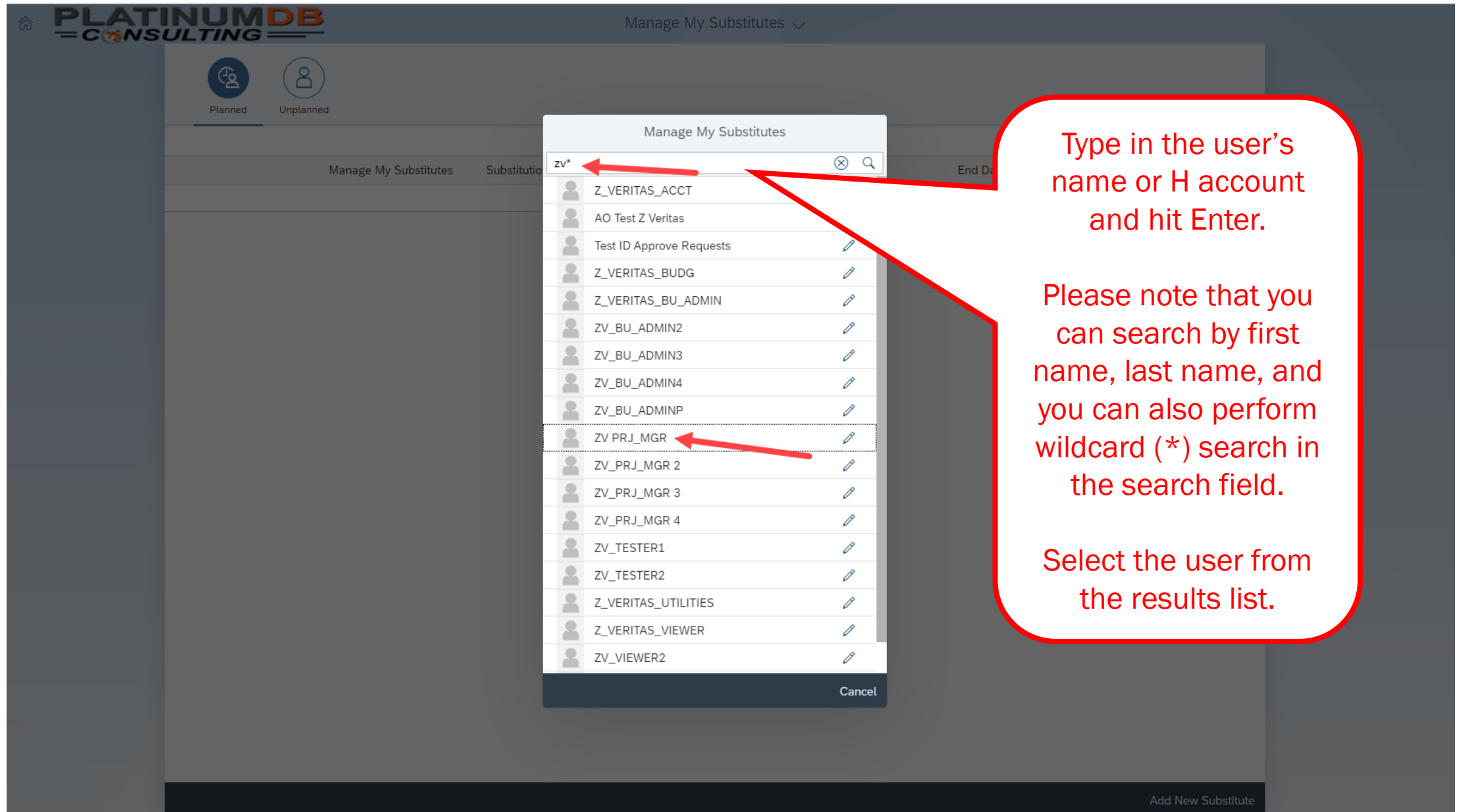
Note how you can add Planned vs Unplanned delegates.

My Substitutes	Substitution Period	Task Group	Start Date	End Date
No data				

After selecting Planned or Unplanned, click to Add New Substitute

Add New Substitute

Approval Delegation



Manage My Substitutes

Planned Unplanned

Manage My Substitutes Substitution

zv*

Z_VERITAS_ACCT	
AO Test Z Veritas	
Test ID Approve Requests	
Z_VERITAS_BUDG	
Z_VERITAS_BU_ADMIN	
ZV_BU_ADMIN2	
ZV_BU_ADMIN3	
ZV_BU_ADMIN4	
ZV_BU_ADMINP	
ZV PRJ_MGR	
ZV_PRJ_MGR 2	
ZV_PRJ_MGR 3	
ZV_PRJ_MGR 4	
ZV_TESTER1	
ZV_TESTER2	
Z_VERITAS_UTILITIES	
Z_VERITAS_VIEWER	
ZV_VIEWER2	

Cancel

Add New Substitute

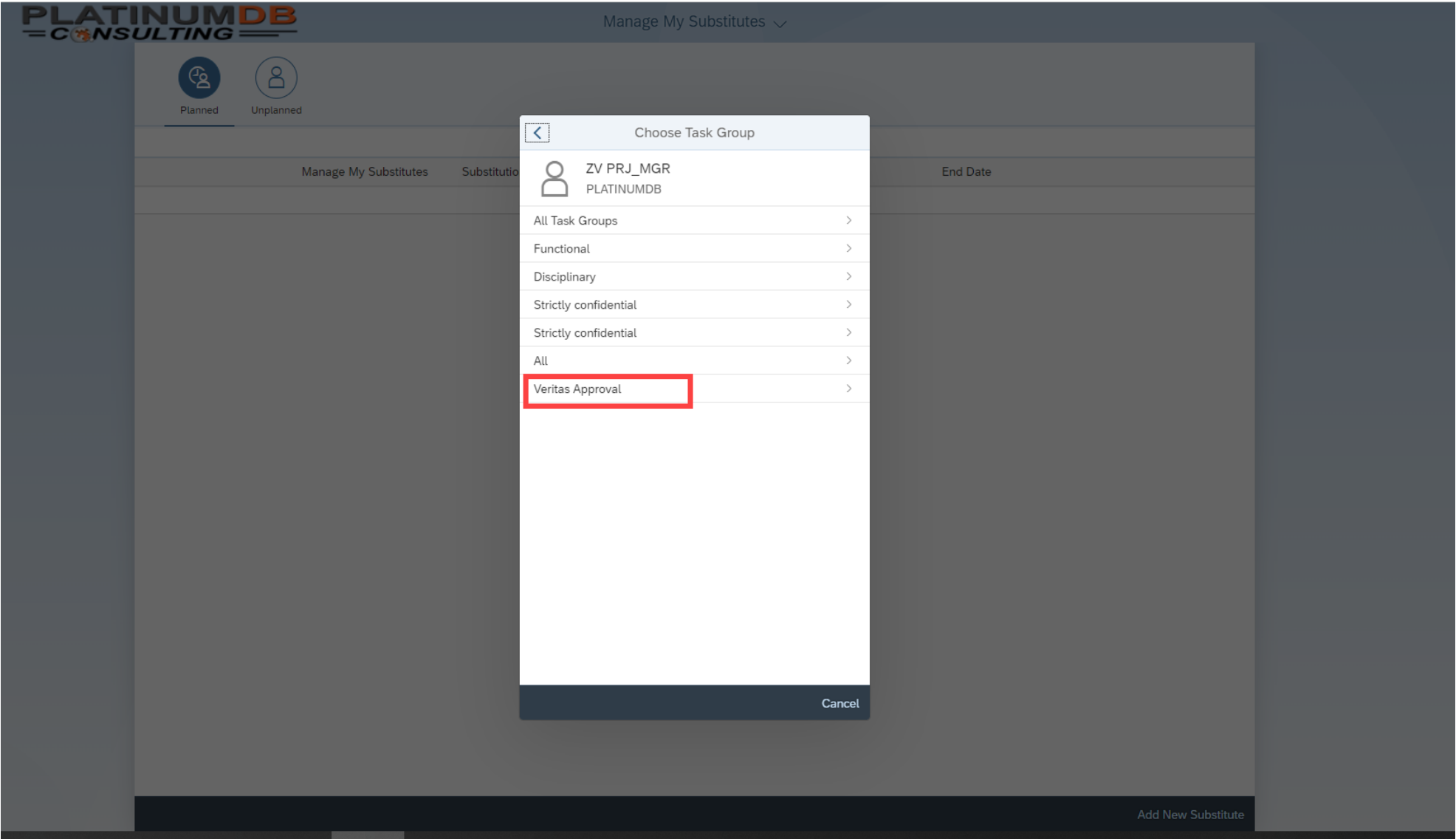
Type in the user's name or H account and hit Enter.

Please note that you can search by first name, last name, and you can also perform wildcard (*) search in the search field.

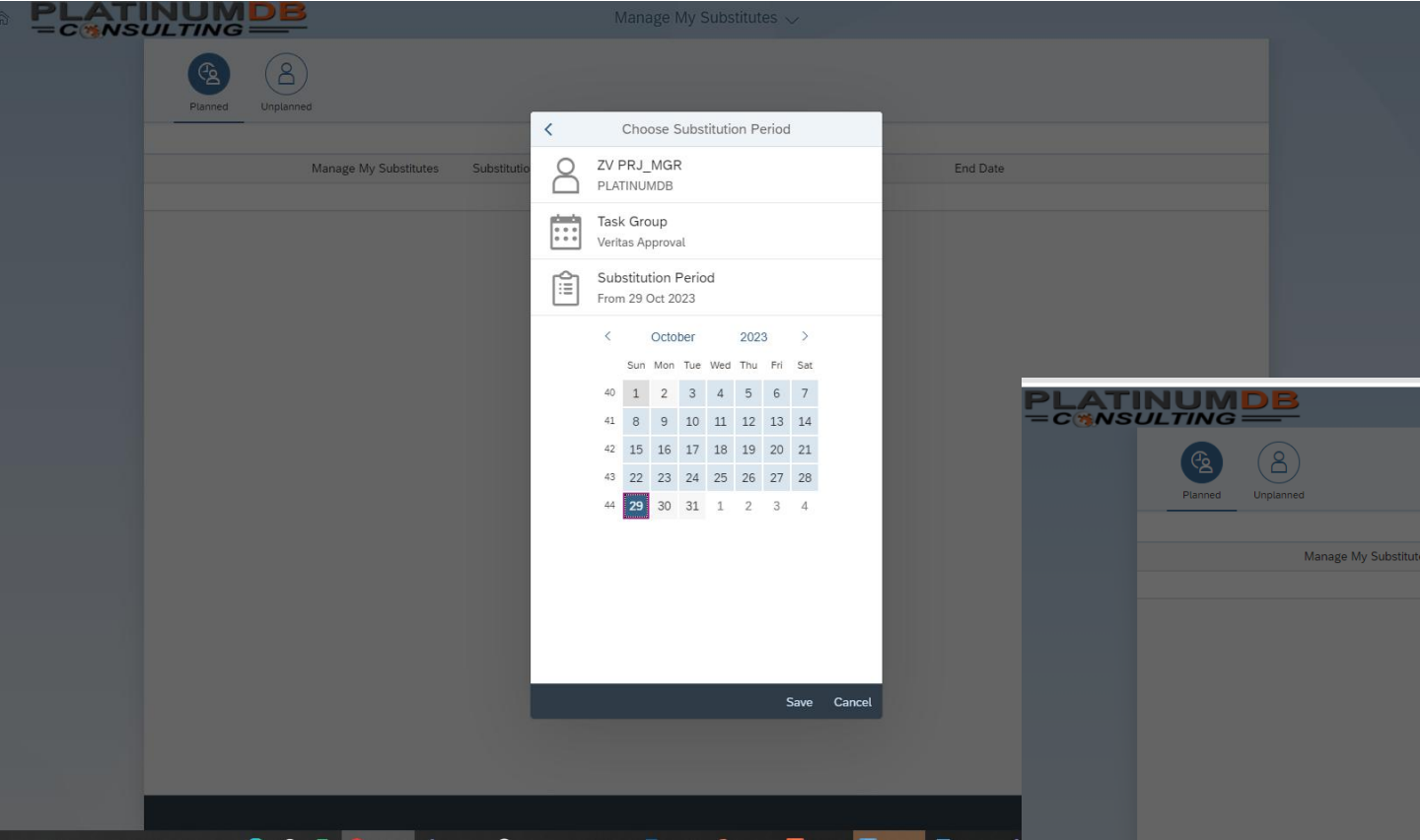
Select the user from the results list.

Approval Delegation

Select the Veritas Approval task group.

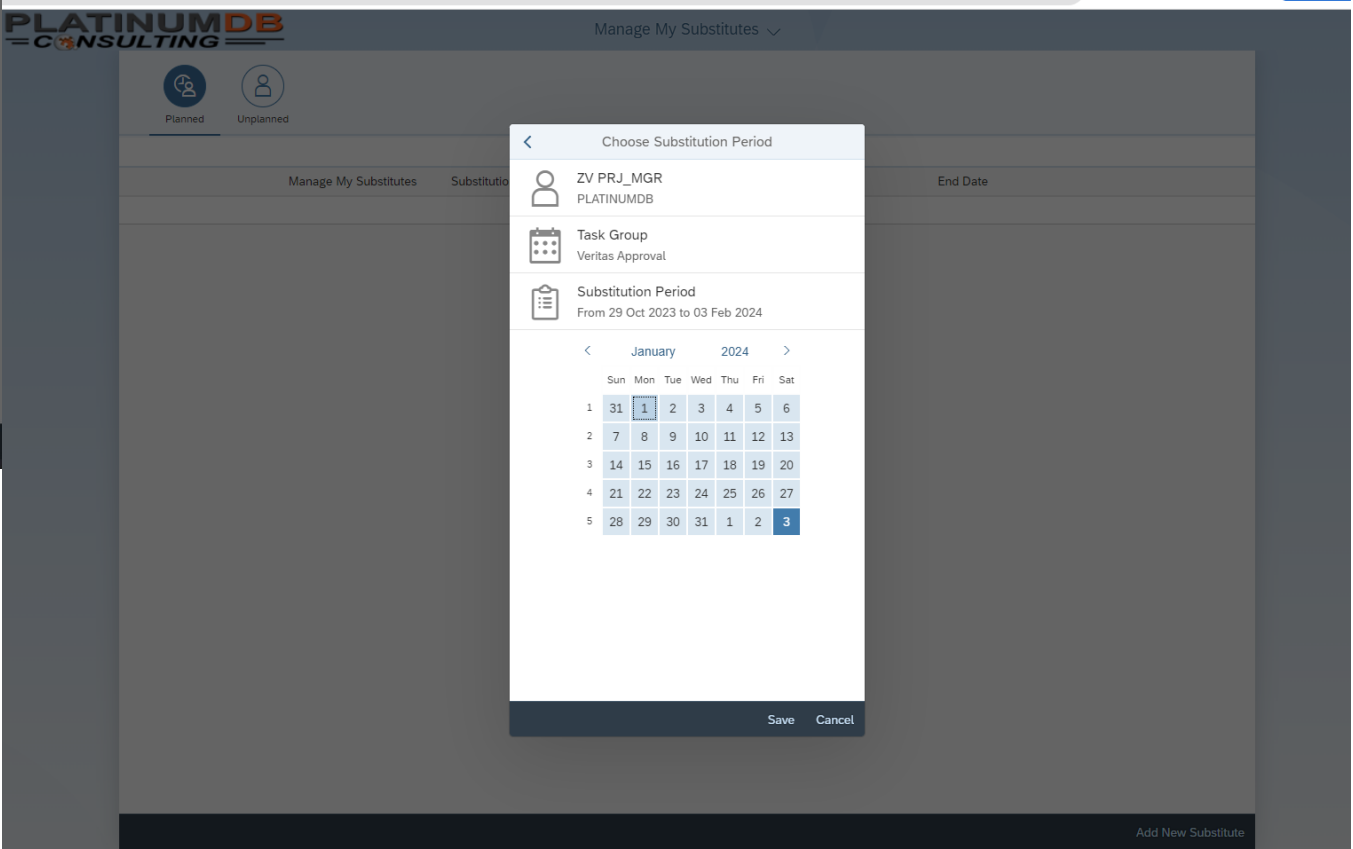


Approval Delegation



Select the From and To for Substitution Period, if Planned Substitute.

For Unplanned Substitute, only a From is needed.



Approval Delegation

PLATINUMDB
CONSULTING

Manage My Substitutes

Planned

Unplanned

	Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date
ZV PRJ_MGR Active		Ends in 3 Months	Veritas Approval	10/28/2023	02/02/2024

Successfully added Planned Substitute.

Add New Substitute

Approval Delegation – Planned Substitute

Approval task is displayed in both approver's Inbox.

When either user approves the task it is removed from all approver's inbox.

The screenshot displays two overlapping views of the Platinum DB Consulting application. The top view shows the user interface for Sarah Kim, with a 'Veritas Approvals' dropdown menu open, displaying a table of tasks. The bottom view shows the user interface for ZV PRJ_MGR, also with the 'Veritas Approvals' dropdown menu open, displaying the same table of tasks. A red box highlights the text: 'Approval task is displayed in both approver's Inbox. When either user approves the task it is removed from all approver's inbox.' Red arrows point from this text to the task listed in both dropdown menus.

Task Title	Status	Priority	Created By	O...	Created On	Due On	R...	A...	Pr...	Pr...
☐ delegate testing: Idea Gate approval	Ready	Medium	Workflow System		Oct 30, 2023, 5:26 PM		0	Idea Gate	JP0 5-230 01	delegate testing

Approval Delegation – Unplanned Substitute

PLATINUMDB
CONSULTING

Manage My Substitutes

Planned

Unplanned

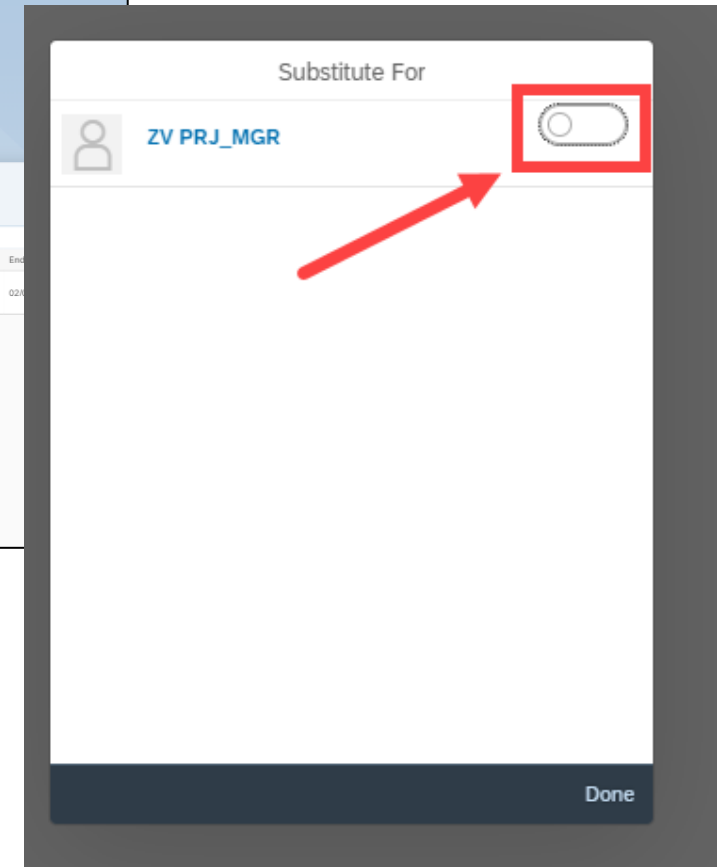
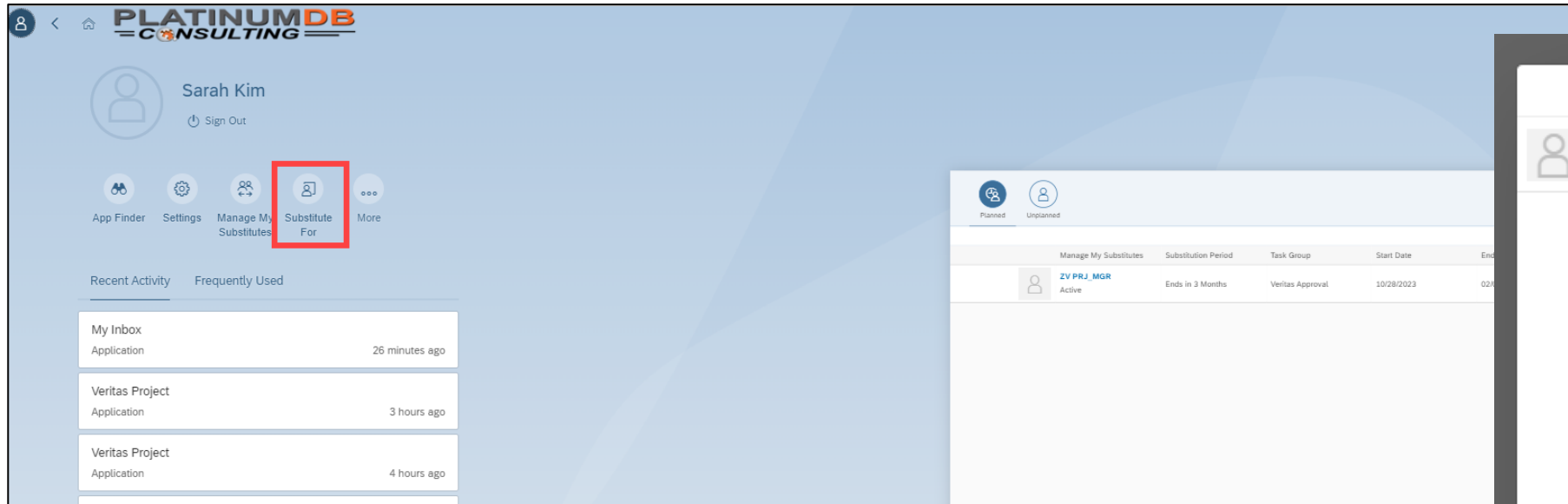
Manage My Substitutes	Task Group	Start Date
 Brian Snyder	Veritas Approval	10/28/2023

Substitution rule created

Add New Substitute

In this case, your substitute will need to accept the substitution in order to see your tasks in his/her inbox.

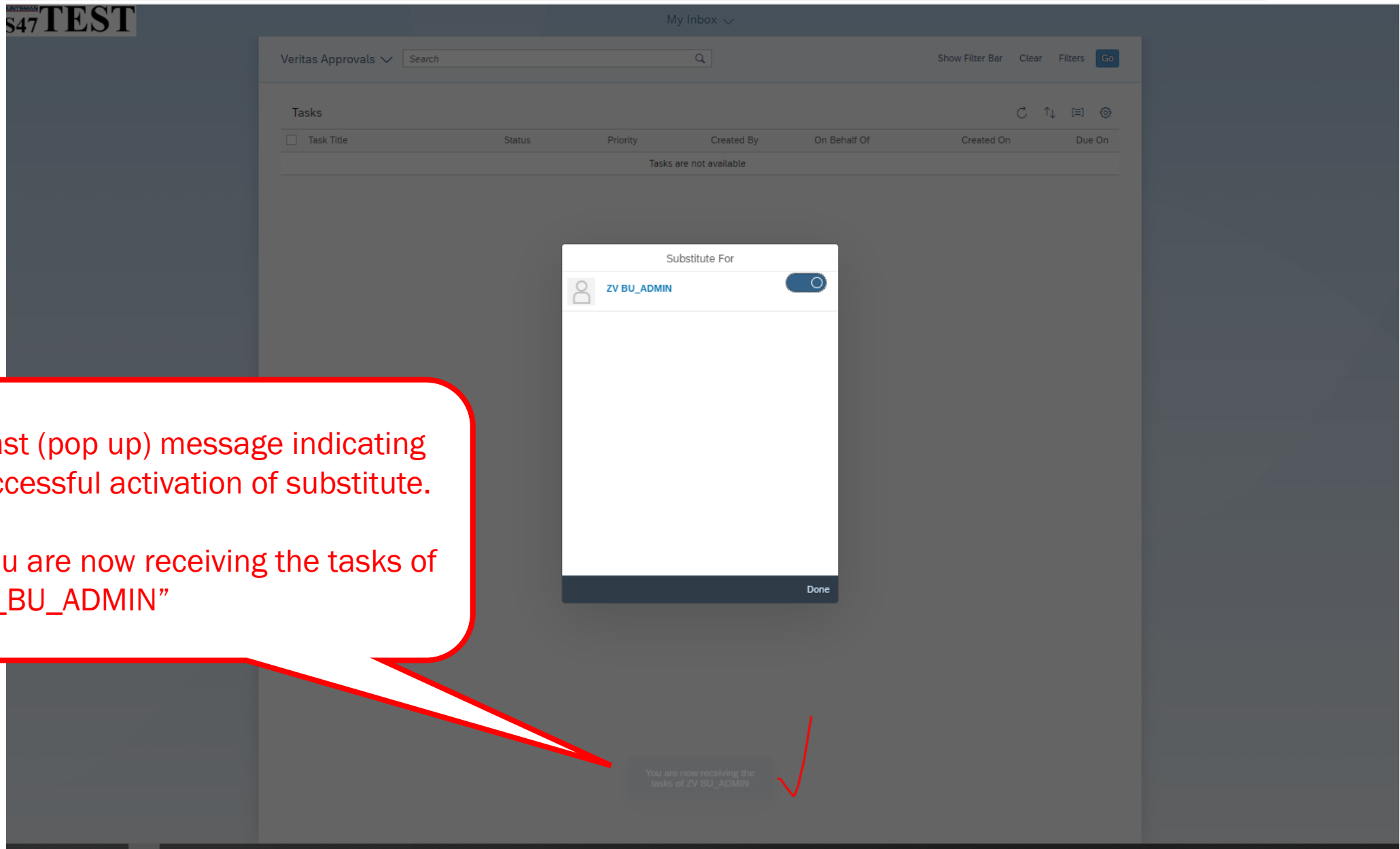
Approval Delegation – Unplanned Substitute



Take Over Tasks as an Unplanned Substitute

- You can take over or stop receiving tasks from users, who have nominated you as their unplanned substitute.
- To do so, proceed as follows:
 1. Navigate to Me/User Profile area.
 2. Select Substitute For tab.
 3. You will see the list of users who have nominated you as their unplanned substitute. By default, you will not be receiving their tasks. If you want to take over, you will need to activate the substitution for that particular user.
 4. Click on the switch button to activate the substitution rule for the selected user. Once activated, the switch button turns green.
 5. After you activate/deactivate the user, choose Done.
 6. If you deactivate the substitution rule, you will stop receiving tasks from the selected user.

Approval Delegation – Unplanned Substitute



Toast (pop up) message indicating successful activation of substitute.

“You are now receiving the tasks of ZV_BU_ADMIN”

Logging into the System

- Veritas resides in SAP but uses a newer web-based user interface. The system will use Single Sign On so entering your ID and a password will not be necessary.
- Important Note: Veritas can be accessed on any desktop or mobile device, but you must be logged onto the corporate network (VPN) before accessing Veritas.
- Automated email sent when account is created.

S47 Link – Testing/Training System

- <https://s47.platinumdb.com/veritas>

S48 Link – Production System

- <https://s48.platinumdb.com/veritas>

One Time Setup Activities – To Be Done by Every User

- Add Job Aid for saving views

Gate Approval – Gate 0, 1, 4, and 5

▪ Trigger the Approval

- The **Complete Phase** button on the Gate page will trigger the approval process, clicked by anyone with Edit authorization for the Project
- The system will validate all required data needed for the Gate then start the approval process
- The status of the Gate decision point will be set to Routing for Approval

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix, merged with the Site, Division and Corporate users who hold those roles

▪ Finish the Approval

- **Result: Approved**
 - Gate Actual Date will be set to the current date
 - The status of the Gate decision point will be set to Approved
 - The long texts will be copied to next Gate if the text has not been maintained yet
- **Result: Rejected**
 - The status of the Gate decision point will be set back to Draft

▪ Hold the Approval

- Triggers hold process

Gate 0 Idea – Requirements & Notifications

1. Project Long Name
2. Project Description (Exec Summary)
3. Project Sponsor for projects over certain \$ amount
 - As defined in the Approver Decision Table

Notified:

1. User who submitted gate approval
2. SCC

Gate 1 Feasibility– Requirements & Notifications

1. Project “Long Name” (100 chars) (also add to the create screen)
2. Portfolio Input: Earliest/Latest Start Quarter,
3. Business Benefits: NPV, IRR, Payback, PI (Profitability Index)
4. Required Texts
5. Project Description (exec summary)
6. Benefits
7. Project Risk (Technical/Commercial)
8. Alternative options considered
9. Estimate

Notified:

1. User who submitted gate approval

Pre-CER or Pre-CER Extension - Approval

▪ Trigger the Approval

- The **Submit Pre-CER** button on the Pre-CER (Extension) page will trigger the approval process, clicked by anyone with Edit authorization for the Project
- The system will validate all required data needed for Pre-CER funding request then start the approval process.
- The Pre-CER may only be submitted if the active phase is Concept or Detailed Scope and no Phase 1 CER was approved yet
- The status of the Pre-CER or Pre-CER Extension will be set to Routing for Approval
- The status of the Project will be set to Routing Pre-CER Approval

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix, merged with the Site, Division and Corporate users who hold those roles
 - SCC, Site Controller, Site Manager, Division Approvers (DOA)

▪ Finish the Approval

- **Result: Approved**
 - Pre-CER Actual Approval Date will be set to the current date
 - The status of the Pre-CER will be set to Approved
 - The status of the project will be set to Pre-CER Approved
- **Result: Rejected**
 - The status of the Pre-CER will be set back to Draft

▪ Hold the Approval

- Triggers hold process

Pre-CER – Requirements & Notifications

1. Project Description
2. Project Long Name
3. Dates: Work Start, Work Complete
4. Required Texts
 1. Why Pre-CER is Required
 2. Project Description (exec summary)
 3. Benefits
 4. Project Risk (Technical/Commercial)
 5. Alternative options considered
5. Sanction amounts
6. Estimate amounts
7. Check for Gate 2 or Gate 3 Planned Dates
8. Active Phase must be = CONCEPT, or DETAILED SCOPE (if no PHASE 1 CER was created)

Notified:

1. User who submitted gate approval

Gate 2 Concept/Phase 1 CER - Approval

▪ Trigger the Approval

- The Complete Phase w/o Phase 1 CER button on the Gate 2 Phase page will complete the phase without triggering the Phase 1 CER approval process.
- The Submit Phase 1 CER button on the Gate 2 Phase page will trigger the approval process, clicked by anyone with Edit authorization for the Project
 - The system will validate all required data needed for Gate 2 then start the approval process.
 - The status of the Gate 2 decision point will be set to Routing for Approval
 - The status of the Project will be set to Routing for Phase 1 CER Approval

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix, merged with the Site, Division and Corporate users who hold those roles
- If Phase 1 CER has been submitted for approval, a button will be visible for users that will open the Approval Questions page filtered to only display questions related to this approval type (i.e. Phase 1 CER vs Full CER).

Gate 2/Phase 1 CER – Approval (cont'd)

▪ Finish the Approval

▪ Result: Approved

- Gate 2 Actual Date will be set to the current date
- The status of the Gate 2 decision point will be set to Approved
- The texts from Gate 2 will be copied to Gate 3 if the text has not been maintained yet
- For Phase 1 CER:
 - The status of the project will be set to Phase 1 CER Approved
 - Generate the CER number and update the project details field
 - Notifications sent: user who submitted the request, SCC, and KL (SAP Admin)

▪ Result: Rejected

- The status of the Gate 2 decision point will be set back to Draft
- Notify the user who submitted gate approval
- Notify all approvers that approved before the reject happened
- Reset the Project Funding Status to the value prior to the approval submission

▪ Hold the Approval

- Triggers hold process

Gate 2/Phase 1 CER – Requirements & Notifications

1. Project Long Name
2. Estimate
3. Required Texts
 1. Project Description (exec summary)
 2. Benefits
 3. Project Scope
 4. EHS impact
 5. Project Risk (Technical/Commercial)
 6. Alternative options considered
4. Asset Questionnaire

Notified:

1. User who submitted gate approval
2. SCC
3. SAP Admin (KL)

Gate 3 Detailed Scope/Full CER - Approval

▪ Trigger the Approval

- The Submit CER button on the Gate 3 Phase page will trigger the approval process, clicked by anyone with Edit authorization for the Project
- The system will validate all required data needed for Gate 3 then start the approval process.
- The status of the Gate 3 decision point will be set to Routing for Approval
 - Gate 6 and Gate 7 Planned Dates are no longer editable (while Routing for Approval)
- The status of the Project will be set to Routing for Full CER Approval

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix, merged with the Site, Division and Corporate users who hold those roles

▪ Finish the Approval

- **Result: Approved**
 - Gate 3 Actual Date will be set to the current date
 - Gate 6 and 7 Planned Dates are read only
 - The status of the Gate 3 decision point will be set to Approved
 - The texts from Gate 3 will be copied to Gate 4 if the text has not been maintained yet
 - The status of the project will be set to Full CER Approved
 - Generate the CER number and update the project details field if a CER number has not yet been set on the project
 - Notifications sent: user who submitted the request, SCC, and KL (SAP Admin)

Gate 3 Detailed Scope/Full CER - Approval

- **Result: Rejected**
 - The status of the Gate 3 decision point will be set back to Draft
 - Notify the user who submitted gate approval
 - Notify all approvers that approved before the reject happened
 - Reset the Project Funding Status to the value prior to the approval submission
- **Hold the Approval**
 - Triggers hold process

Gate 3 Detailed Scope/Full CER – Requirements & Notifications

1. Project Long Name
2. Estimate, PDRI, Accuracy
3. Dates: Planned Dates for Commission and Closure
4. Required Texts
 1. Project Description (exec summary)
 2. Benefits
 3. Project Scope
 4. EHS impact
 5. Project Risk (Technical/Commercial)
 6. Alternative options considered
 7. Purchasing & Contract Strategy
6. Asset Questionnaire

Notified:

1. User who submitted gate approval
2. SCC
3. SAP Admin (KL)

Gate 6 Commission - Approval

▪ Trigger the Approval

- The **Complete Phase** button on the Gate 6 Phase page will trigger the approval process, clicked by anyone with Edit authorization for the Project
- The system will validate all required data needed for Gate 6 then start the approval process.
- The status of the Gate 6 decision point will be set to Routing for Approval

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix, merged with the Site, Division and Corporate users who hold those roles

▪ Finish the Approval

- **Result: Approved**
 - The status of the Gate 6 decision point will be set to Approved
 - The texts from Gate 6 will be copied to Gate 7 if the text has not been maintained yet
 - Notification to Site SAP Admin take necessary action
 - IOs should be set to TECO (Technically Complete)
- **Result: Rejected**
 - The status of the Gate 6 decision point will be set back to Draft
 - Notify the user who submitted gate approval
 - Notify all approvers that approved before the reject happened

Supplemental/Supplemental 2 - Approval

▪ Trigger the Approval

- The **Submit Supplemental CER** button on the Supplemental funding request page will trigger the approval process, clicked by anyone with Edit authorization for the Project
- The system will validate all required data needed for a Supplemental request then start the approval process.
- The status of the Supplemental request will be set to Routing for Approval
- The Project Funding Status will be set to Routing for Supplemental CER Approval

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix, merged with the Site, Division and Corporate users who hold those roles

▪ Finish the Approval

- **Result: Approved**
 - Supplemental Approved Date will be set to the current date
 - The status of the Supplemental CER will be set to Approved
 - The Project Funding Status will be set to Supplemental Approved
 - Notifications sent: user who submitted the request, SCC, and KL (SAP Admin)
- **Result: Rejected**
 - Notify the user who submitted gate approval
 - Notify all approvers that approved before the reject happened
 - Reset the Project Funding Status to the value prior to the approval submission
 - Reset the status of the Supplemental CER back to Draft

Gate 7 Closure - Approval

▪ Trigger the Approval

- The **Submit for Approval** button on the Gate 7 Phase page will trigger the approval process, clicked by anyone with Edit authorization for the Project
- The system will validate all required data needed for Gate 7 then start the approval process: Reference [Data Fields XLS](#)
- The status of the Gate 7 decision point will be set to Routing for Approval
- Warning message if no assets listed

▪ Approval Flow

- The approvers will be determined from the Approver Role Matrix, merged with the Site, Division and Corporate users who hold those roles

▪ Finish the Approval

- **Result: Approved**
 - Gate 7 Actual Date will be set to the current date
 - The status of the Gate 7 decision point will be set to Approved
 - The Project Funding Status is set to Completed
 - **Notify Site SAP Admin to take necessary action.**
 - **IOs should be set to BECO (Business Complete)**
- **Result: Rejected**
 - The status of the Gate 7 decision point will be set back to Draft
 - Notify the user who submitted gate approval
 - Notify all approvers that approved before the reject happened