

Kenta / Administration

Configure project controls and decision authority

Establish explicit project-control capabilities and versioned finance and approval policies without changing identity or Kenta subscription billing.

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► Applicability

Before you begin

- An active organization membership, Kenta entitlement and authorized project membership.
 - Initialization additionally requires the organization-administrator and project-manager combination; later configuration requires control_admin.
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Current capability and authority

Establish explicit project-control capabilities and versioned finance and approval policies without changing identity or Kenta subscription billing.

Clearly labeled synthetic example

Synthetic project NC-P2 assigns cost reading to its cost manager and contract approval to its procurement director. Initializing controls administration alone grants neither capability.

Inputs and terminology

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Term	Meaning
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Control administration	Authority to configure this project; it does not implicitly grant cost reading or approval capabilities.
Reporting currency	The approved currency basis for this project; retained rates explain foreign-currency conversions.

Procedure

1. Open Controls settings

Check the organization and project before opening Controls settings. If offered, review the initialization basis and choose Initialize controls administration. This grants only control_admin.

2. Assign explicit capabilities

Open Access and authority and choose Grant or revoke authority. Select the project member, exact capability and decision, then explain the authority basis. Review before saving.

3. Configure finance

Open Financial policy and configure reporting currency, recognition, tax, timezone and source ownership. Add a dated, versioned rate for each needed currency. Save the reviewed revision.

4. Create periods and workflows

Create the applicable open accounting periods. In Approval workflows, select each required technical, contract, budget or schedule route, named reviewers, amount thresholds, evidence count and separation of duties.

5. Publish the reviewed workflow

Submit the draft configuration, then Publish configuration. Check named reviewers and their current capability before publication; decision and finalization commands revalidate authority. New proposals select an exact published version; existing proposals retain their prior version.

Verify the result

Settings survive reload with retained revisions and accountable owners. Capabilities are visible individually.

What happens next

These settings do not establish an external accounting connection, change an identity role or alter a software subscription.

Customer finance/legal owners must approve actual recognition, tax, contractual thresholds and delegation rules before operational use.

Troubleshooting

Initialization is unavailable

Check the required organization role and project-manager membership. An existing controls administrator prevents reinitialization. Ask the existing designated administrator to review the grant; do not attempt role switching.

Workflow publication is rejected

Check each named reviewer's current project membership and matching approval capability, thresholds and required evidence. Correct the draft, submit and publish a new exact revision.