

Processing Your Approvals

When a contract requester submits a contract, it first routes through Contract Type and Compliance Approvals, after which it will go to the specified Contract Manager. (The choices of contract managers for each department are configured by the administrators of the system.)

Once the Contract Manager is ready, they will send it on the Department Approver(s).

Finding Your To-Do List

There are three main ways to see your Pending Approvals:

1. Email. You will receive an email when your approval is required. Click the "Review" link to open the Approval record for review:

Subject: Contract #697 requires approval

Content: The contract shown below is ready for your approval. Click **Approve** to approve the contract and route to the next approval. Click **Review** to view the approval record and change the status directly.

Status:	Pending Approval
Approval Team:	OGC Team
Contract ID:	697
Contract Company Name:	zGoogle
Contract Start Date:	Oct 01 2018
Contract Amount:	\$20,000

2. Contract Approver Home Page. The Contract Approver Home Page lists your Assigned Pending Approvals. Click the Edit icon or the Approval Title to open the Approval record for review:

Contract Approver Home Page

All My Approvals

Approvals: My Assigned Pending Approvals

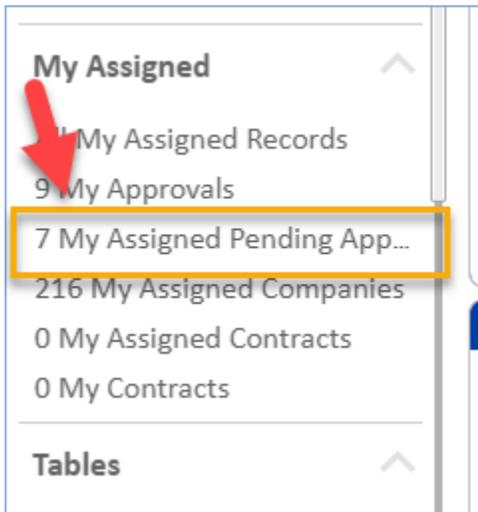
Status: 7 record(s) found, 1 page(s) [Click for details...](#)

Search: -TEXT- contains Go

Show All Refine String Context Active Only More Options My Assigned Pending Approvals

Edit	ID	Approval Title	Status	Approval Team	Approver	Contract Company Name	Contract Title	Contract Start Date
	1163	TEST- Relate Care Service Agreement - HDW (InfoSec Team)	Pending Approval	InfoSec Team		RelateCare LLC	TEST- Relate Care Service Agreement	Dec 01 2018

3. My Assigned. The My Assigned section in the left pane lists your Assigned Pending Approvals, along with the total number of records requiring your approval.



Click that search to display the results, and open the record for review as described in option 2 above.

Review Pending Approval

To review the contract request:

1. Get an overview of the Approval by looking at the Approval form and looking at all the tabs.
2. Review any attachments, turn Track Changes on, and add comments or make changes as necessary.
3. Review specific contract request details as necessary.
4. Look at who else will be approving it.
5. Determine whether anyone else is needed, and add them as necessary.
6. Add any notes to Approval Notes. Notes are required if you will not approve.
7. Click Approve to Approve, or click Require Changes to send it back to the Contract Manager.

Details Tab

The first two sections of the Details tab show you the Status, the Approval Title, which indicates why you're seeing it, buttons to Approve and Require Changes, and where this approval falls in the order of all approvals for the contract (Step Number):

Approval

Save Cancel
Details Related Approvals Emails History

Collapse All

ID: 1163 Status: Pending Approval

Approval Title: TEST- Relate Care Service Agreement - HDW (InfoSec Team)

Approve Require Changes

Contract Managers List

Status: 3 record(s) found, 1 page(s). Click [here](#) to recount records.

<input type="checkbox"/>	Edit	ID ↓	Division Name	Department Name	Intake Person	Contract Manager	Department Code
<input type="checkbox"/>		835	SLUCare Clinical Affairs	SLUCare Administration	contractmanager1...	contractmanager1...	D445
<input type="checkbox"/>		366	SLUCare Clinical Affairs	SLUCare Administration	Katy Wittwer	Katy Wittwer	D445
<input type="checkbox"/>		345	SLUCare Clinical Affairs	SLUCare Administration	Mary Lynn Thompson	Mary Lynn Thompson	D445

Approval Details

*Step Number: 1

Approval Team: InfoSec Team Approver: _____

Department Approvers

Status: No records.

Other sections include:

Approval Notes

Approval Notes

Approval Running Notes

Approval Running Notes

Attachments

Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.

ID ↓	Attachment Type	Attached File	Include in Approval Packet	Include in DocuSign Envelope	Status
477	Document Provided by Outside Party	Relate Care Agreement.docx	Yes	No	Active

Contract Details

Contract ID: 739

Contract Title: TEST- Relate Care Service Agreement

Contract Company Name: RelateCare LLC Contract Owner: Alicia Kosydor Contract Manager: Katy Wittwer

Approval Notes

The system requires that you enter Approval Notes if you are requiring changes. You can also use Approval Notes to explain anything you feel is useful or necessary or want to have on record.

Attachments

Any contract attachment records marked as being included in the Approval packet are listed here. You can click the Attached File name (in blue) to view the attachment, or if allowed, edit the attached document.

Reviewing Attachments

Click the Attached File name to review the attachment:

The screenshot shows a user interface for managing attachments. At the top, there is a section titled 'Attachments' with a status message: 'Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.' Below this is a table with columns: 'ID', 'Attachment Type', 'Attached File', 'Include in Approval Packet', and 'Include in Document Environment'. The first row has ID '477', Attachment Type 'Document Provided by Outside Party', and Attached File 'Relate Care Agreement.docx'. The 'Attached File' cell is highlighted with a yellow box, and a red arrow points to it. To the right of the table, there are three buttons: 'Download/Save', 'View File', and 'Edit and Checkout'. A red arrow points to the 'Edit and Checkout' button. A preview window is open over the 'Edit and Checkout' button, showing the document title 'Relate Care Agreement.docx' and a close button.

If you will not need to make any changes or add any comments to the attachment, you can click "View File."

Otherwise, click "**Edit and Checkout.**" This will allow you to make changes directly within the document, and prevent other approvers from making changes at the same time. Changes you make will be saved directly to the system on the cloud. If Edit and Checkout is not available to you, it may mean that it's already been checked out by someone else.

Please ensure that Track Changes is turned on if you use Edit and Checkout by going to Review > Track Changes.

Note: Edit and Checkout is available for Microsoft Word, Excel and Powerpoint. Track Changes is only available for Microsoft Word.

Reviewing Contract Details

If you need to see more contract details, you can click on the hyperlinks in the Contract Details section to open the Contract request record.

Related Approvals Tab

The Related Approvals tab gives you access to related Approvals:

[Add Ad Hoc Approval](#)

Use this to filter the list of approvers or to assign to a team

Ad Hoc Approver Team Ad Hoc Approver

[Add Ad Hoc Approval](#)

[Concurrent Approvals](#)

Any approval records with the same step number as this approval are shown here.

Status: 5 record(s) found, 1 page(s). Click [here](#) to recount records.

[New](#) [Mass Edit](#) [Delete](#) [Search](#) [Unlink](#) [Actions](#)

[Views](#) [Search](#) [Print](#)

<input type="checkbox"/>	Edit	ID ↓	Step Number	Status	Approval Title	Approver	Approval Team	Approved/Rejected By
<input type="checkbox"/>	Edit	1164	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Export Controls Team)		Export Controls Team	
<input type="checkbox"/>	Edit	1162	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Compliance Team)		Compliance Team	
<input type="checkbox"/>	Edit	1161	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Risk Management Team)		Risk Management Team	
<input type="checkbox"/>	Edit	1160	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (OGC Team)		OGC Team	
<input type="checkbox"/>	Edit	1159	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Treasury Team)		Treasury Team	

Number of Open Concurrent Approvals 5 [Calculate](#)

[Next Approvals](#)

The approval(s) next in the workflow queue for this contract are shown here.

Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.

[New](#) [Mass Edit](#) [Delete](#) [Search](#) [Unlink](#) [Actions](#)

[Views](#) [Search](#) [Print](#)

Add Ad Hoc Approver

If there is someone else who should approve the contract request and they are not listed in Concurrent Approvals or Next Approvals, you can add them in the Add Ad Hoc Approval section.

You can choose the Approval Team and/or the Approver. Select the Ad Hoc Approver Team; this will refresh the list of approvers on that team. Then optionally choose the Ad Hoc Approver. Click Add Ad Hoc Approval to create a new approval record in Pending Approval status at the same step as your approval.

Note: The approver you choose must have the appropriate permissions to be able to approve the record.

Concurrent Approvals

This related table shows all approvals for this contract request at the same step number as the current approval.

Next Approvals

This related table shows the approvals that are scheduled next in the workflow queue after the current approval.

Approve Pending Approval

To approve the request, click the Approve button at the top of the form:

ID	1163	Status	Pending Approval ▼
Approval Title	TEST- Relate Care Service Agreement - HDW (InfoSec Team)		
	 <input type="button" value="Approve"/>	<input type="button" value="Require Changes"/>	

Require Changes for a Pending Approval

If changes are required, add Approval Notes about what kind of change is required and then click Require Changes. This will change the Approval's status to "Requires Change," and notify the Contract Manager that a change is required.

ID	1163	Status	Pending Approval ▼
Approval Title	TEST- Relate Care Service Agreement - HDW (InfoSec Team)		
	<input type="button" value="Approve"/>		<input type="button" value="Require Changes"/>