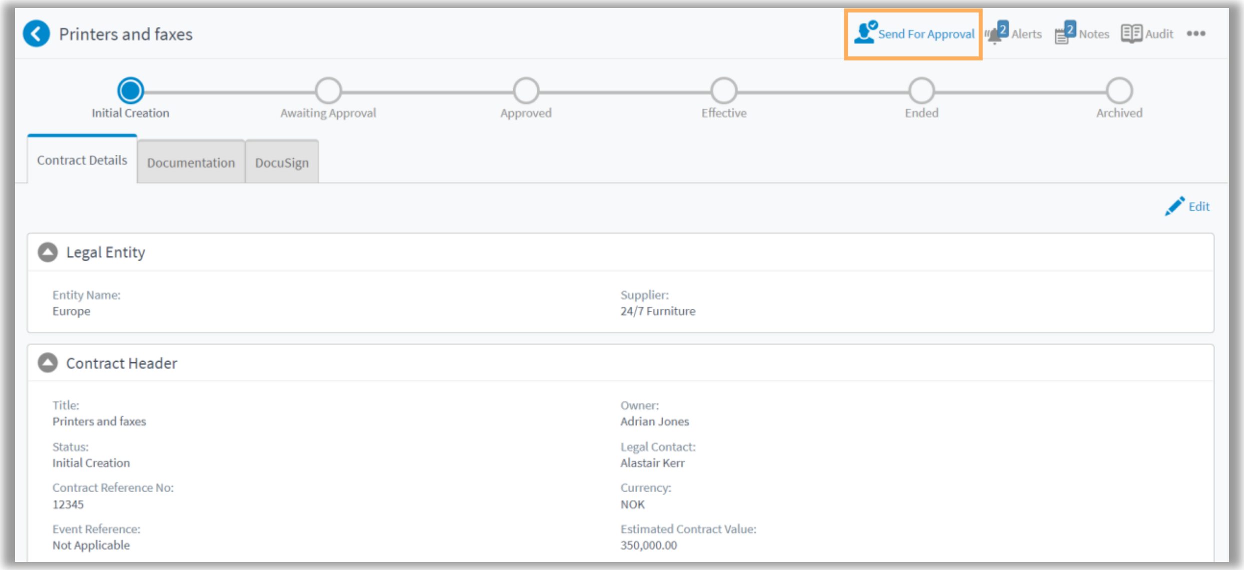
Approvals in Contract Management

Approvals form a key part of Medius Contract Management, with contracts holding being critical to supplier relationships, its essential the necessary actions within your contract management system go through the correct routes of approval. This guide will talk you through how to:

- Navigate around the approvals screen
- Send a contract for approval
- Reject or approve a contract
- Delegate approvals to another user

Send to approval

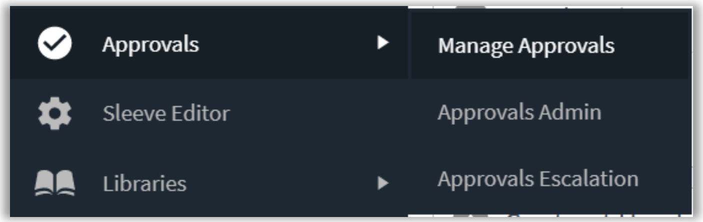
Once a contract has been created, if you have approvals set up, you will be required to send the contract for approval. To do this, click **Send For Approval** at the top right of the screen:



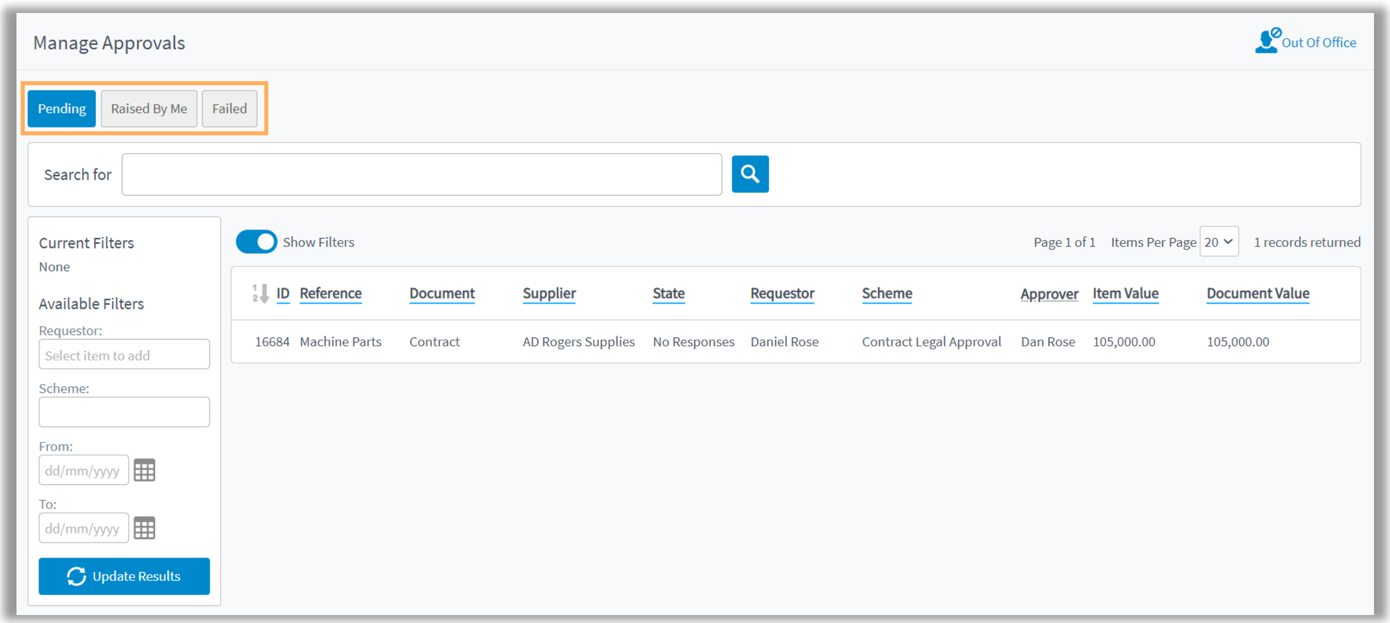
Note: Sending a contract for approval will trigger the predefined approvals route and will notify the relevant person or people that they have a contract to either approve or reject.

Navigating in the Approvals Section

To view and manage the main areas of the approvals process, click the **Manage Approvals** menu option from the **Approvals** menu option and follow the instructions below:



1. To view and manage all contracts that are pending your approval, click the **Pending** tab.

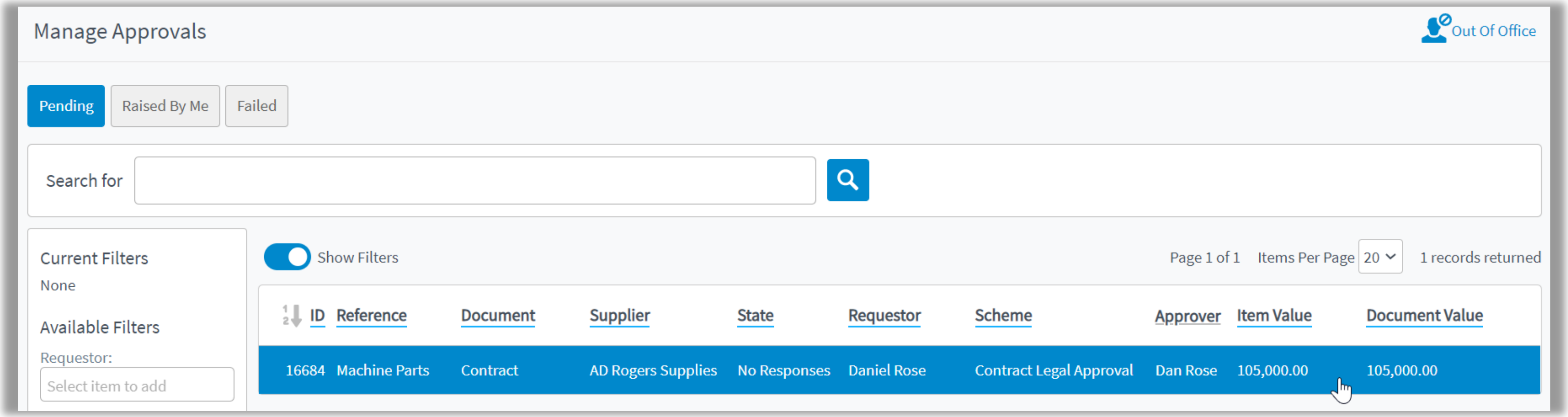


2. Click into the **Raised by Me** tab to check all approvals that you have initiated.
3. Click the **Failed** tab to view all contracts that have failed the approval process.

How to Approve or Reject a Contract

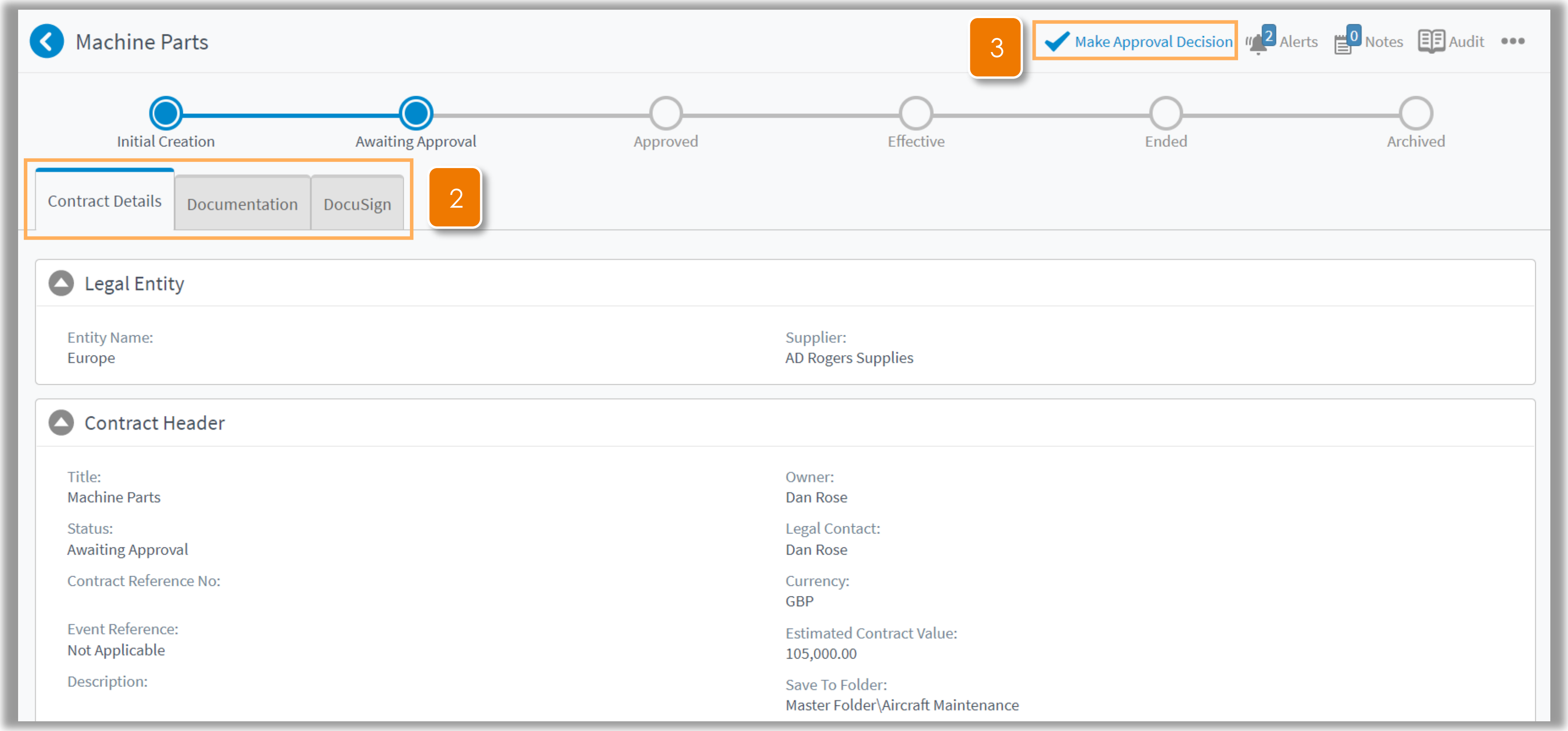
If your role requires you to approve or reject contracts, you will be notified when a contract has been sent for your approval. To approve or reject a contract, follow the instructions below.

1. From within the **Pending** tab, click on the contract record you wish to action.

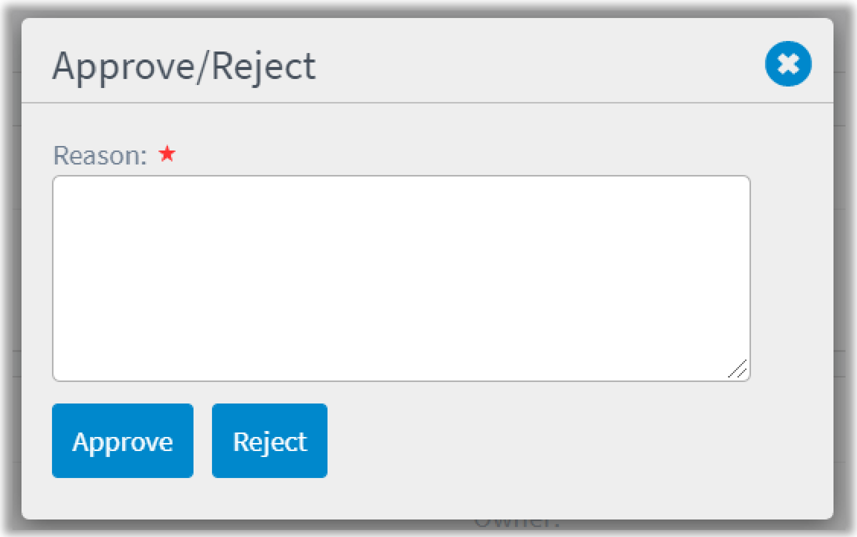


2. Navigate between the contract tabs to check if the contract details are documentation is correct.

3. Click **Make Approval Decision** in the top right when you are ready to make a decision.



4. In the popup that appears, indicate an **Approve** or **Reject** decision using the buttons and add your reason to the text box above this.

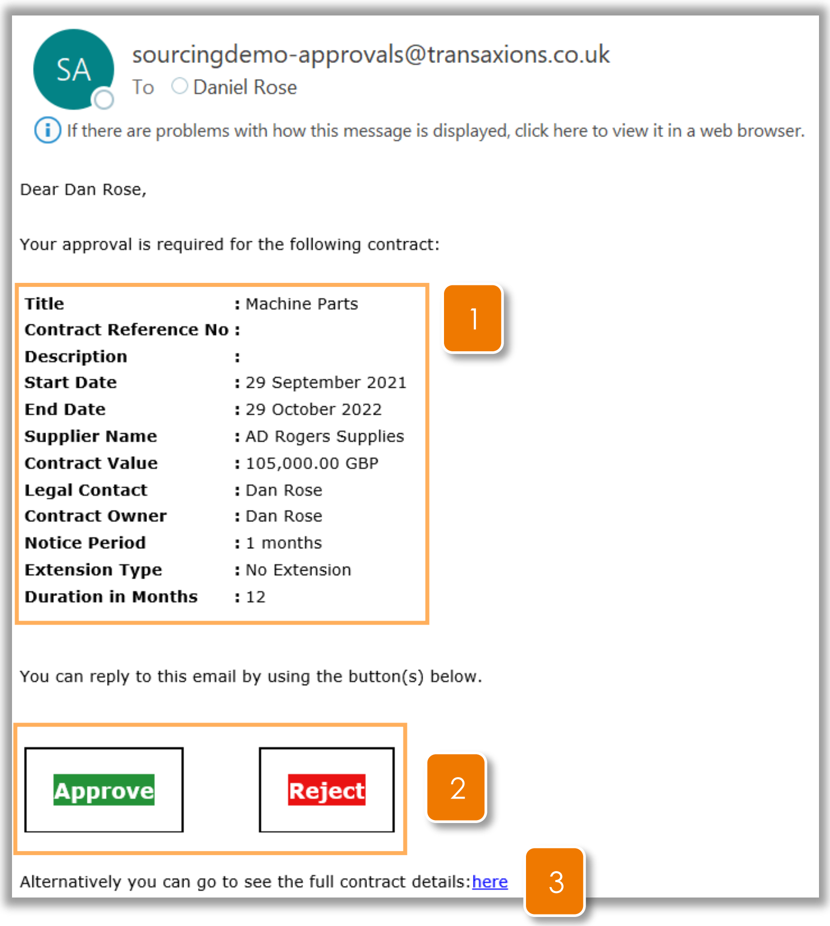


How to Approve or Reject a Contract via Email

Medius Contract Management supports email approvals for ease of use and time efficiency. This means that a contract can be approved or rejected without having to log in to the system. However, accessing the system is required should you need to check the full details of the contract. To approve or reject a contract via email, follow the steps below.

2. Check the top-level details of the contract in the email.

3. If the information provided within the email isn't sufficient to decide on the contract approval, then click the **Here** button to see the full contract details in Medius Contract Management.

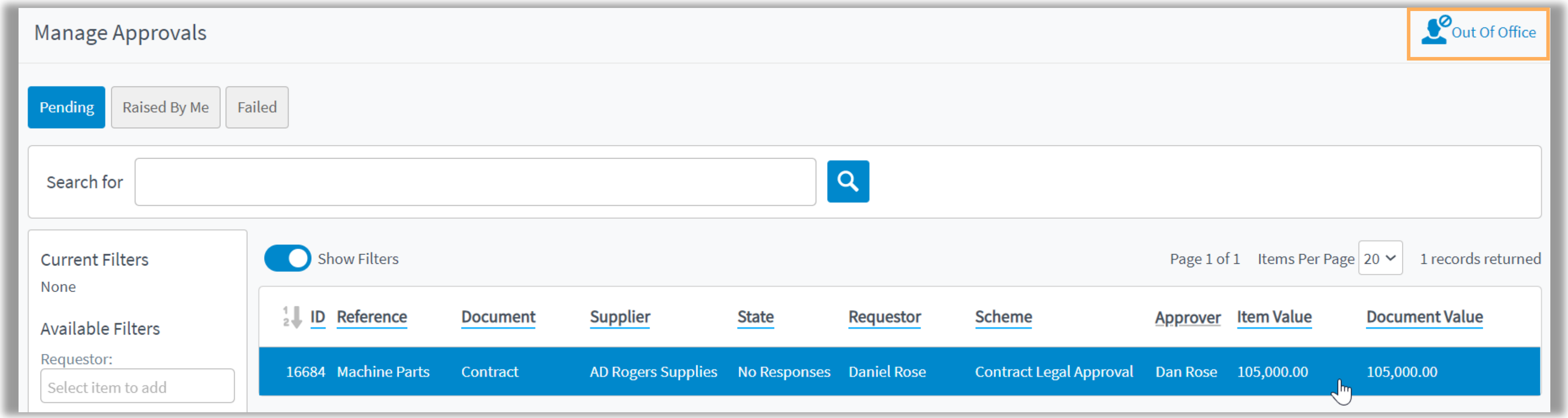


1. If the information provided within the email is sufficient to decide on the contract approval, then click the **Approve** button to approve the contract, giving the contract a status of **Approved**. Or click the **Reject** button to reject the contract back to the creator. Send the subsequent email that pops up, including a reason if rejecting.

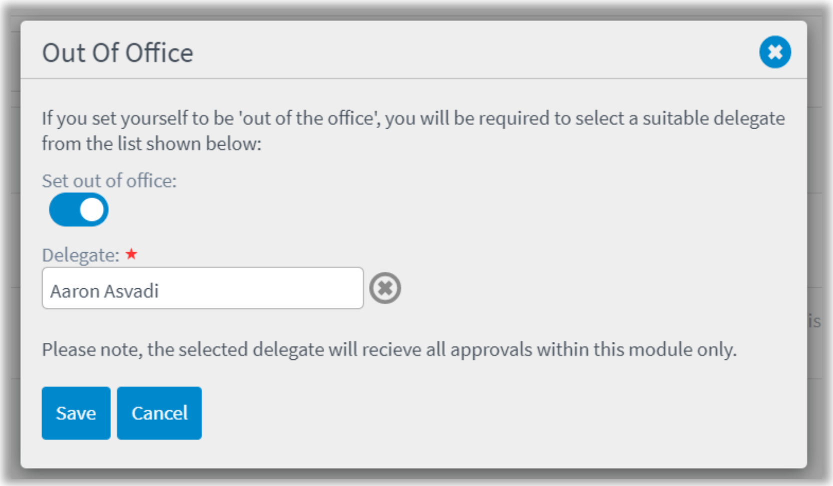
How to Delegate Approvals

If you are out of office for any reason, you may wish to delegate your approvals to another user to ensure there isn't a build of contracts requiring your approval in your absence. To delegate approvals, follow the instructions bellow.

1. Click the **Out of Office** icon in the top right of the screen:



2. In the popup that appears, set the **Set out of office** toggle to on. In the **Delegate** dropdown, select the user you would like your approvals to be sent to while you're Out of Office.

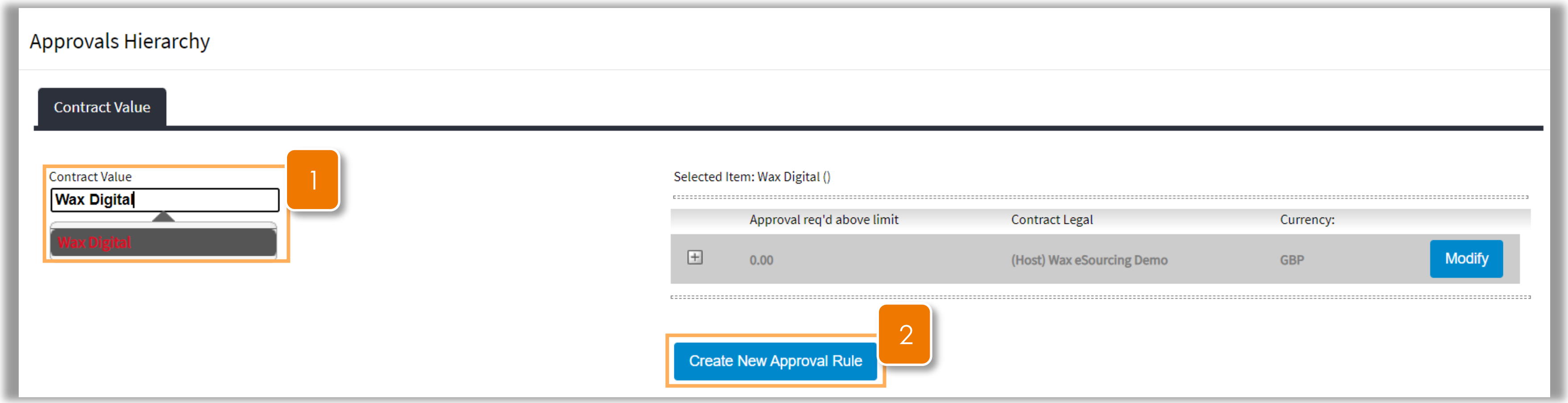


How to Create and Manage Contract Approvals

How to Create and Manage Contract Approvals

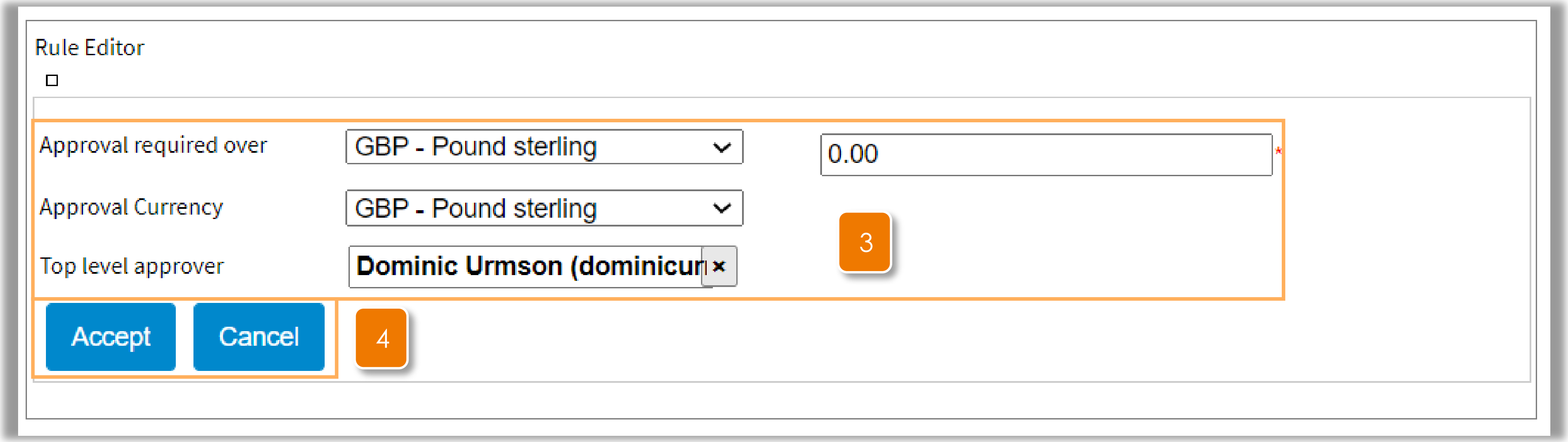
Approval rules can be created against the different entities that you have within your system to ensure approval is given before contracts are published and live. To create and manage contract approvals, follow the steps below:

1. Select an entity by using the search bar and selecting the entity from the box below the search bar. As you type your search, the options shown will be narrowed down based on what you have typed.



2. Click the **Create New Approval Rule** to begin the process to create an approval rule against the selected entity.

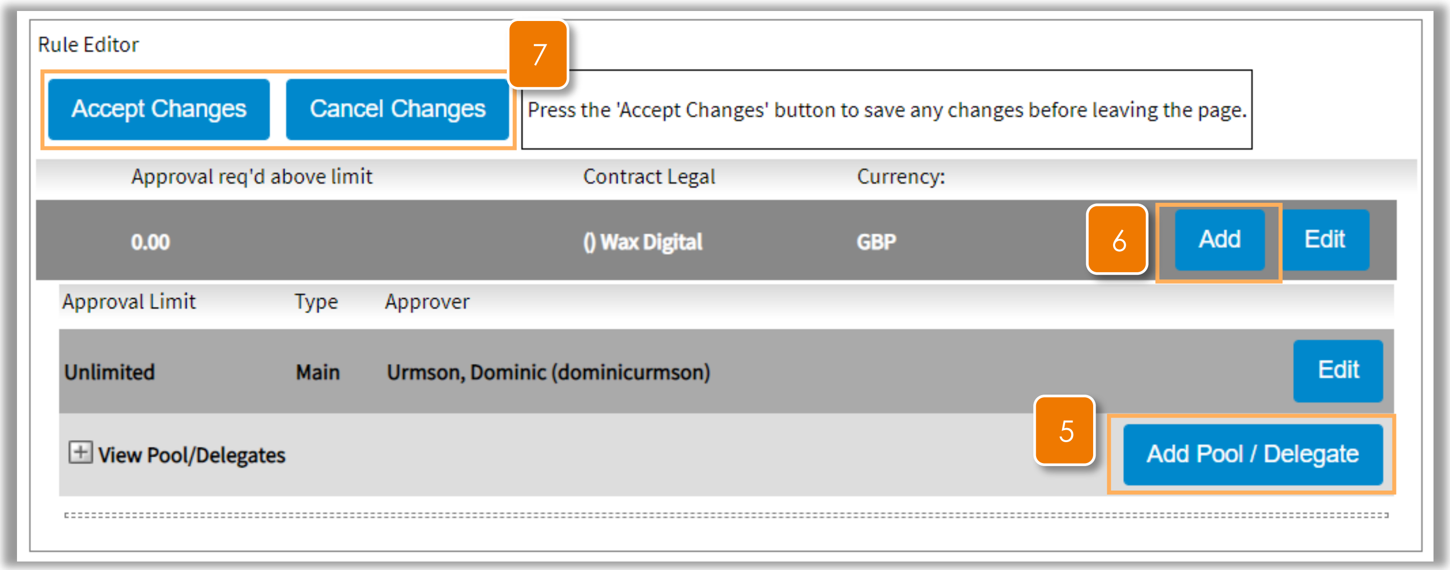
3. Select the **Approval Required Over Currency**, enter the Approval Required Over Amount, select the **Approval Currency** and then select the **Top-Level Approver**.



4. Click **Accept** to continue with creating the approval rule or **Cancel** to stop creating the approval rule.

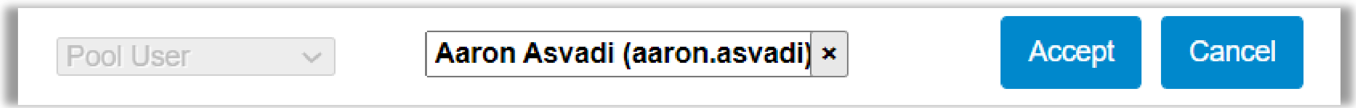
5. Click **Add Pool / Delegate** to add one or more approvers who can approve the spend for the selected entity. Follow step 7 on the next page to continue to do this.

6. Click **Add** to add another level of approval for the entity. Follow step 8 on the next page to continue to do this.

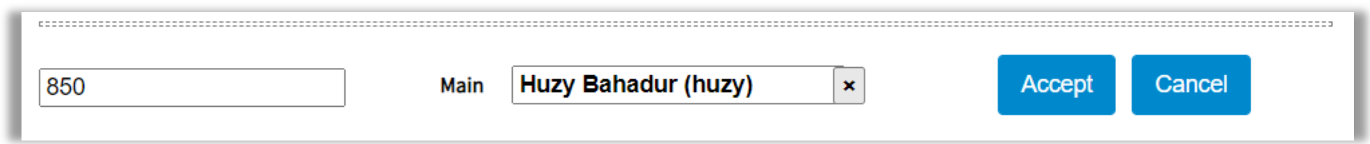


9. Click **Accept** to create the approval rule or **Cancel Changes** to stop creating the approval rule.

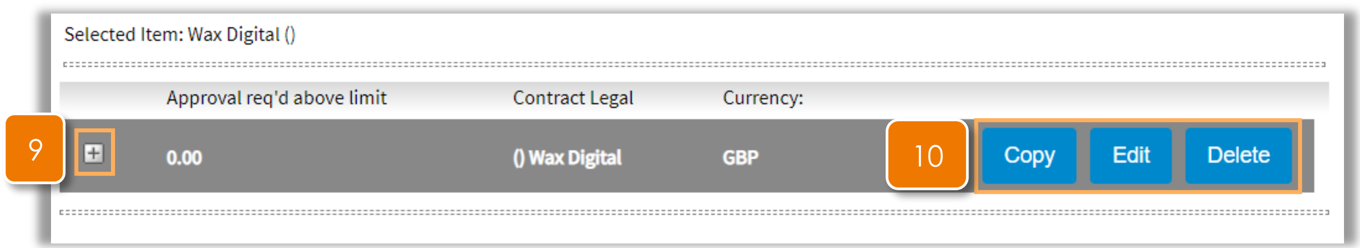
7. Using the available box enter the text for the user you wish to select as an approver and select the user when they appear in the box beneath the search bar. Once you have selected the user, select **Accept**.



8. Enter the amount limit for which approval will be required if over, and then enter the text for the user you wish to select as an approver and select the user when they appear in the box beneath the search bar. Once you have done this, select **Accept**.



9. Once the rule is created, you can use the and icons to either expand or collapse further details about the approval rule.



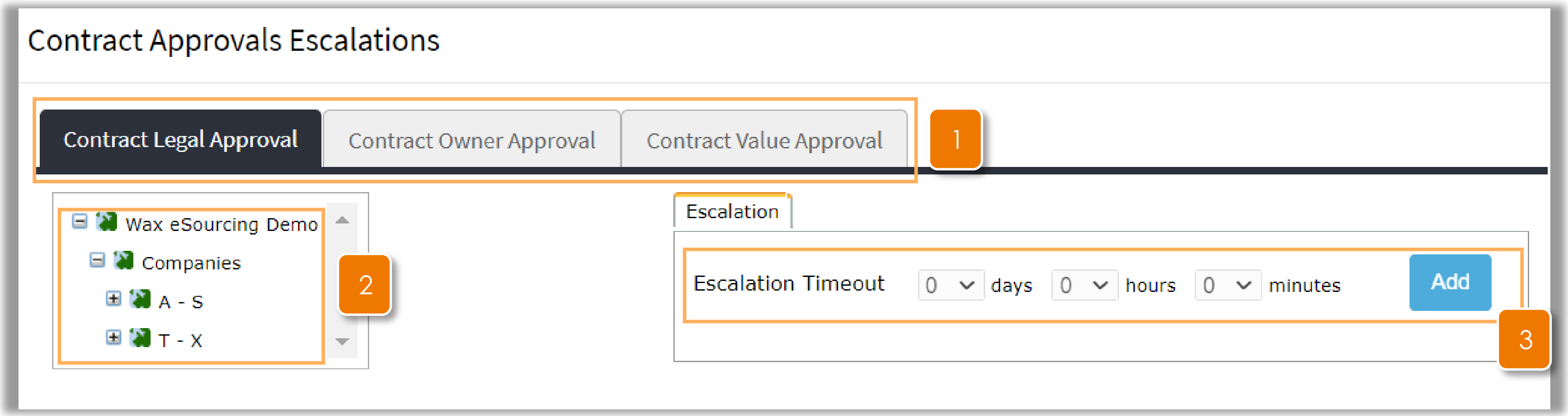
10. You can click **Copy** to create a new approval rule, using the information of this rule as the basis for the new rule, click **Edit** to edit the information of this rule, and click **Delete** to delete the rule.

How to Set Approval Timeouts

So contracts don't remain waiting for approval, timeouts can be set on approvals to reject the contract after a certain period of time, or move it to the next stage of approval. To set approval timeouts, follow the steps below:

1. Select the type of approval you wish to set and escalation timeout for.

2. Select the **Entity** that you wish to set the escalation timeout rule for.



3. Select the number of days, hours and minutes after which you wish the approval to timeout and then click **Update**.