

NC eProcurement

Approval Tasks



After a **Project Owner** submits a document for approval, the designated users, or approvers, receive notification of a task to complete. The **Approval Task** allows approvers to either **Approve** or **Deny** contract documents and provide comments on their reasons for doing so.

I. Approval Task Notifications

1. When a user is selected as an approver for a document within NC eProcurement Contracts, they receive notifications about the **Approval Task** via email and/or a dashboard notification.
2. The email notification contains a link that will take the user directly to the **Task** within the system.

CW7734 - Janitorial Services: Approve Final Version of Contract Document (Including Award Recommendation) requires your approval because "please approve"

The following task can be started: Approve Final Version of Contract Document (Including Award Recommendation)

Task description: Submit the completed Contract Document for approval before sending to the vendor. Add the relevant approvers

The following notes might also be helpful to you:

Please Review

This notification is being sent to any users added as an approver or reviewer on a task.

This email originated from the Ariba system used by NC E-Procurement - TEST and was originally sent to: [redacted]

System Reference: [Click Here](#) to access the system.

To access the document for Approval, follow the link in the email notification.

3. If the approvers are members of the workspace team, they will also receive a **Dashboard Notification** allowing them to view just the **Task** or the entire project. To access the **Approval Task** from the **Dashboard**, navigate to the **'Contracts'** tab and select the **Approval Task** from the **'To Do'** portlet.
4. The approvers can also find the **Task** by selecting **'My Tasks'** from the **'Common Actions'** portlet and choosing the **Approval Task** from the subsequent list.

HOME SOURCING **CONTRACTS** SUPPLIERS Recent Manage Create

Suppliers and Customers Search using Name, ID, or any other term

Common Actions

- Create
 - Contract Workspace (Procurement)
 - Contract Request (Procurement)
 - Analytical Report
 - Compound Report
 - More
- Manage
 - Core Administration
 - Approval Processes
 - My Tasks

To Do

Date ↓	Status	Title
2/6/2020	In Approval	Approve Final Version of Contract Document (Including Award Recommendation) (Janitorial Services ABS)

My Documents

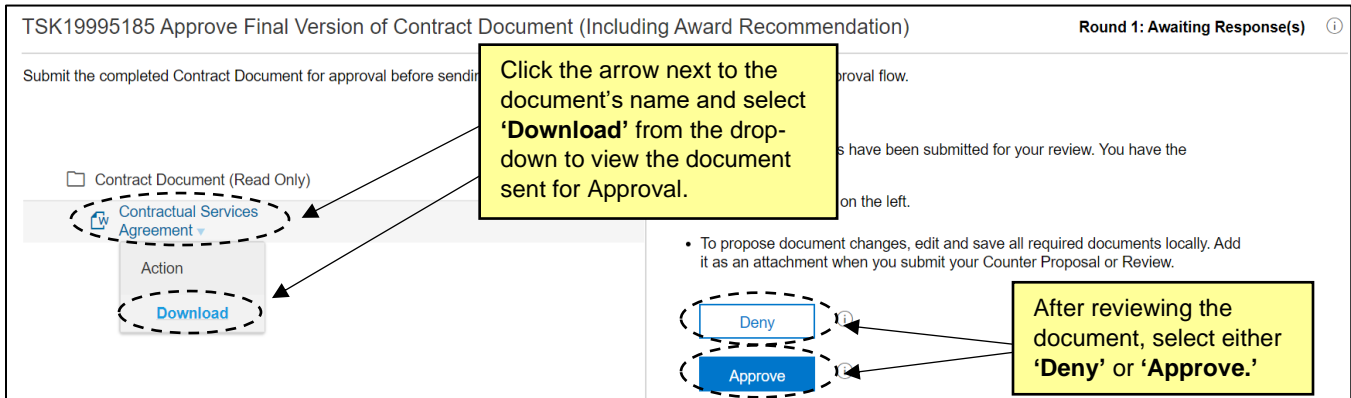
Title	Date	Status
CW7734 - Janitorial Services	2/5/2020	Draft
Sample Stand Alone Agreement Contract 2	1/24/2020	Published
Sample Stand Alone Agreement Contract 1	1/24/2020	Published
Sample Sub Agreement Contract 2	1/24/2020	Published
Sample Sub Agreement Contract 1	1/24/2020	Published
Sample Master Contract 1	1/24/2020	Published
Catalog Contract ABS	1/23/2020	Published

To access all tasks, select 'My Tasks' from the 'Common Actions' portlet.

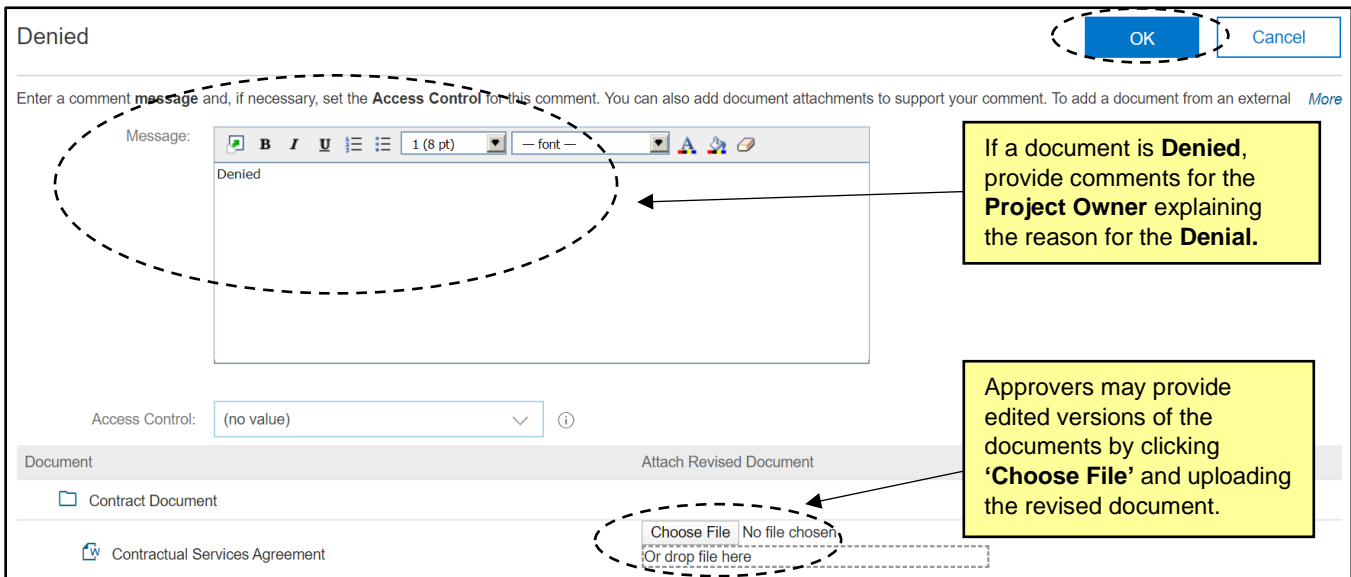
To access the document for Approval, select the 'Approval Task' from the 'To Do' portlet.

II. Approving or Denying a Document

1. After opening the **Task**, the approver can download the document sent for Approval by clicking the arrow to the right of the document name and selecting **'Download'** from the drop-down menu.
2. Once the approver reviews the downloaded **MS Word** document, they can return to the **Approval Task** and click either **'Approve'** or **'Deny'** depending on the appropriate action for the document.



3. If the approver clicks **'Approve,'** the workflow continues to the next approver if there is one, and the **Project Owner** is notified that the document has been approved by that approver.
4. If the approver clicks **'Deny,'** a new round of Approvals will be necessary. Approvers should include a message on the subsequent page explaining the reason for the **Denial**. If necessary, they can include an edited document to return to the **Project Owner** by selecting **'Choose File'** beneath **'Attach Revised File'** and browsing for the appropriate document, or by using the **drag-and-drop** function just below that.



5. The **Project Owner** will be notified that the document was **Denied**, and it will enter a new round of Approvals. All required approvers will see the document again with any changes made by the **Project Owner** in response to the **Denial**, and they will once again have the option to **Approve** or **Deny** it.