

Approval Tasks

Introduction

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.



Learning Objectives

At the end of this job aid, **you will be able to:**



Locate an Approval Task.



Approve a document through a task.



Deny a document through a task.

Approval Tasks

Approval Task Notifications

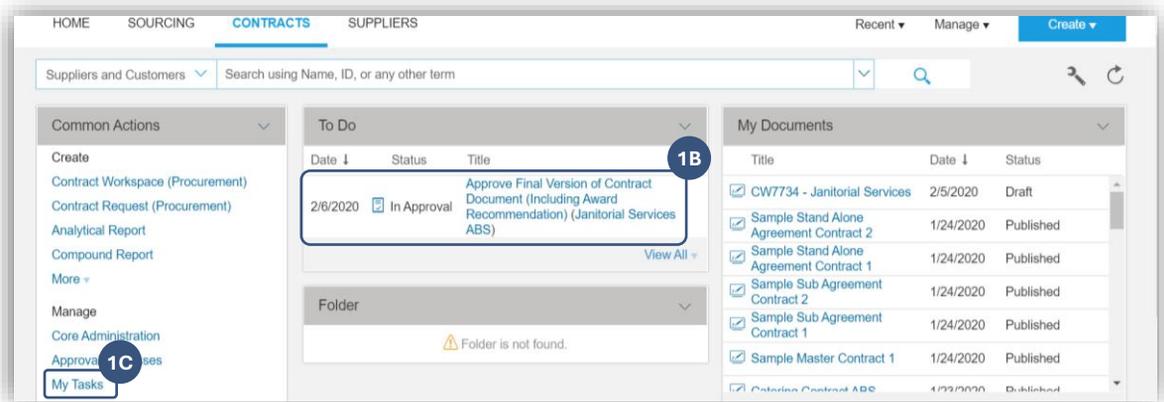
1 When a user is selected as an approver for a document within NC eProcurement Contracts, they receive notifications about the **Approval Task** via email and/or a dashboard notification.

A. The email notification contains a link that will take the user directly to the task within the system.



B. If the approvers are members of the workspace team, they will also receive a **Dashboard Notification** (if the Project Owner included a **Due date** on the task) 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.

C. 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.

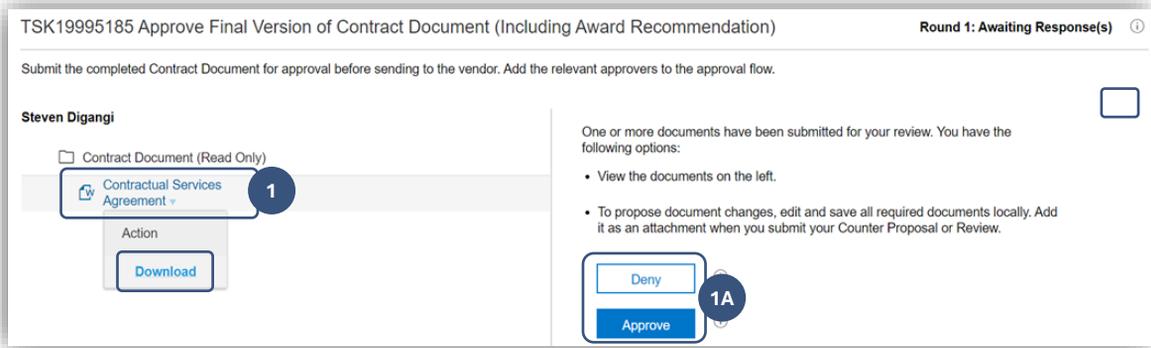


Approval Tasks

Approving or Denying a Document

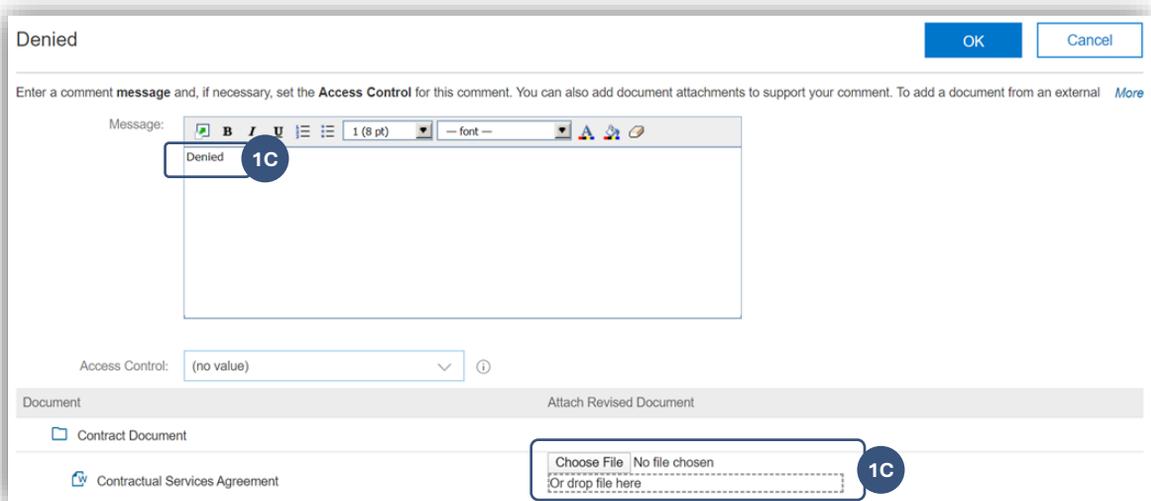
1 After opening the task, the approver can download the document sent for Approval by clicking the arrow to the right of the document name and selecting **Download** from the drop-down menu.

A. Once the approver reviews the downloaded document, they can return to the **Approval Task** and click either **Approve** or **Deny** depending on the appropriate action for the document.



B. 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.

C. 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.



D. 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.