Review and Approval Tasks

Introduction

After a Sourcing Project Owner submits a Review or Approval Task, the designated reviewers or approvers are sent an email notification with a request to complete the task. **Review Tasks** allow reviewers to indicate they have gone over the document(s) included in the task and provided any applicable comments. **Approval Tasks** require approvers to either approve or reject the task and provide comments on their reasoning.

Learning **Objectives**

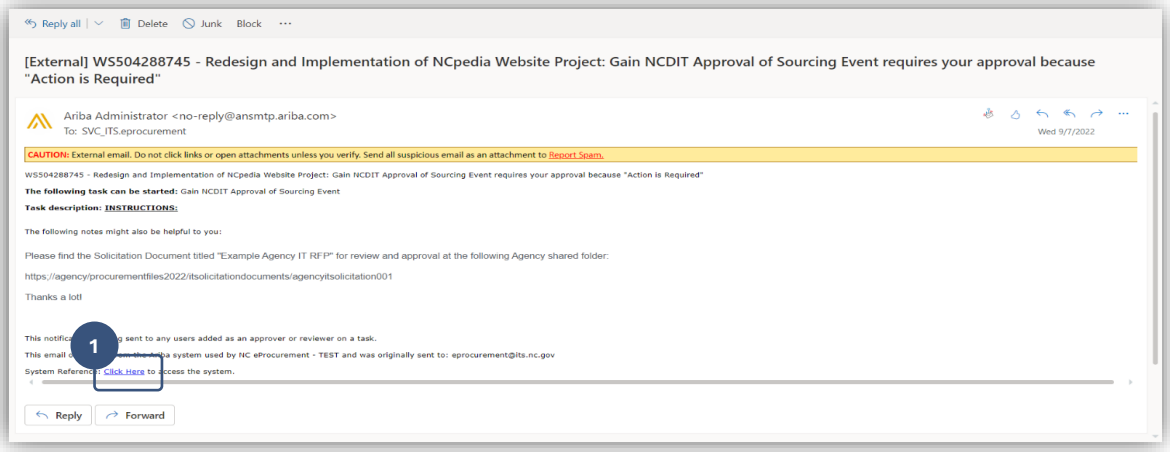
At the end of this job aid, **you will be able to**:

- Locate Approval and Review tasks.
- Approve, Reject, and Complete Review a task.
- Manually add Approvers/Reviewers to the Approval/Review Flow.

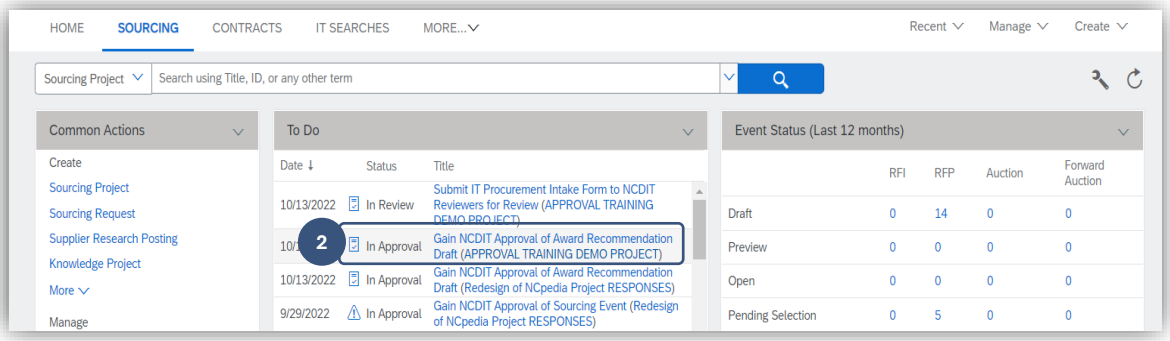
Review and Approval Tasks

Task Notifications

1 When a **Task** is submitted for review or approval, the reviewers or approvers included in the workflow are sent an email notification about the **Task**, and the **Task** will be added to the **To Do** portlet on their **Sourcing** tab. When a group is in the Review or Approval Flow, all members of the group will be sent these email notifications. Email notifications contain a link to take the reviewer or approver directly to the **Task** within the system.



2 If a **Due Date** was provided for the **Task** by the Project Owner, the Reviewer or Approver will also receive a dashboard notification allowing them to access the **Task** from the **To Do** portlet.



In the **To Do** portlet, the Task Name is listed first, followed by the (**Project Name)** in parenthesis. Clicking the Task Name will lead directly to the **Task**, while clicking the (**Project Name)** will lead to the Sourcing Project.

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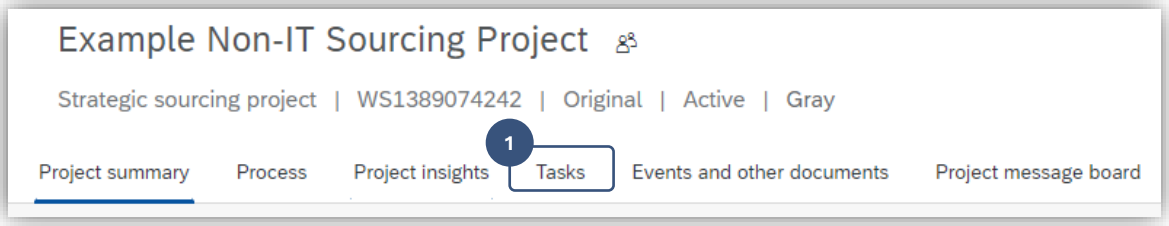
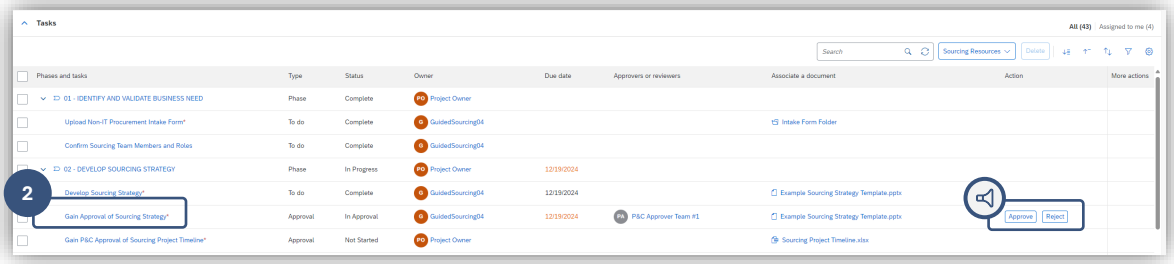
Locating Tasks from the Sourcing Project

1. Approvers and Reviewers listed on the **Team** section of solicitations can also open tasks from the Sourcing Project page. From the sourcing project, click on **Tasks** at the top of the screen or scroll down to the **Tasks** section.



2. After navigating to the **Tasks** section, the reviewer or approver can view a **Task** by clicking the arrow to the left of the associated **Phase** name and clicking the **Task** name.

Reviewers and Approvers can approve/reject or complete the review of **Tasks** from the **Tasks** section of the sourcing project by using the relevant button in the **Action** column.



Ready for approval in an approval node indicates that user or group is the active approver. **Pending** indicates that user or group will be able to after previous approvals have been made.

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Approval Tasks - Locating Associated Documents

1 Approval Tasks allow approvers to either **Approve** or **Reject** Sourcing Project documents and provide comments on their reasons for doing so. Approval Tasks must be completed in full by all approvers in the **Approval Flow** before the agency user can move on to the next **Task**.

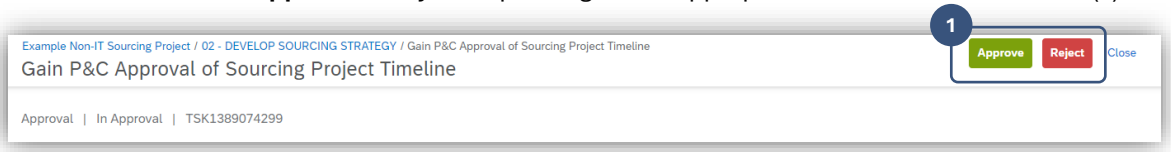
A. After opening the **Task** and scrolling down to the **Associated document** section, click the down arrow to the left of the associated folder to display documents within that folder.

B. Click the download icon to the right of any document to download the attached document(s) for review and approval.

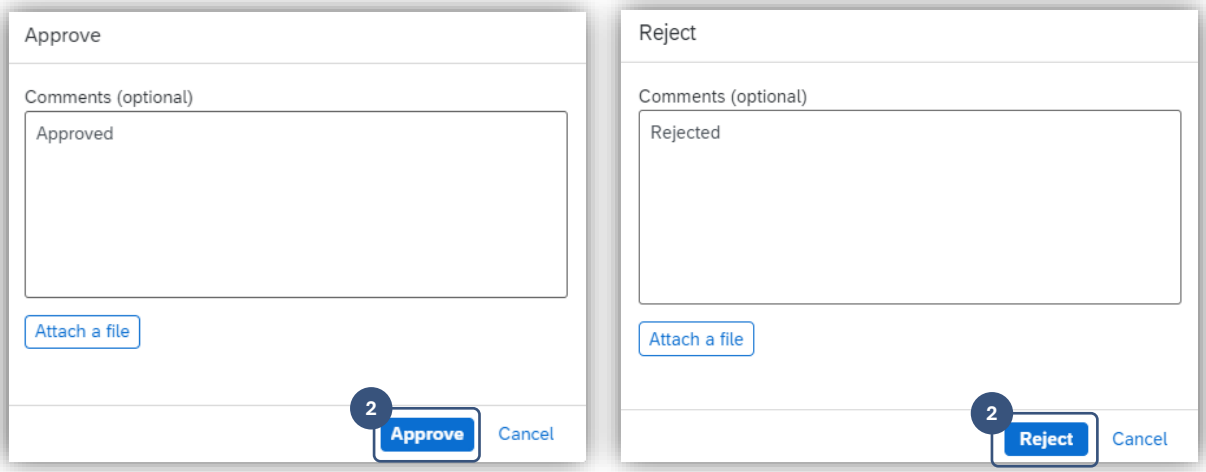
If the Project Owner updates or adds any documents while the task is submitted, those documents will not be visible through the task. Approvers will have to access the relevant folder in the **Events and other documents** section of the Sourcing Project to see the new documents.

Approving or Rejecting an Approval Task

1 After reviewing the document(s) attached to the **Task**, the approver can return to the Approval Task and click either **Approve** or **Reject** depending on the appropriate action for the document(s).



2 After clicking **Approve** or **Reject**, approvers can add comments or attachments and click **Approve** or **Reject** button to finish approving or rejecting the task.



If an Approver rejects a task, include a comment explaining the specific reasons for the rejection.

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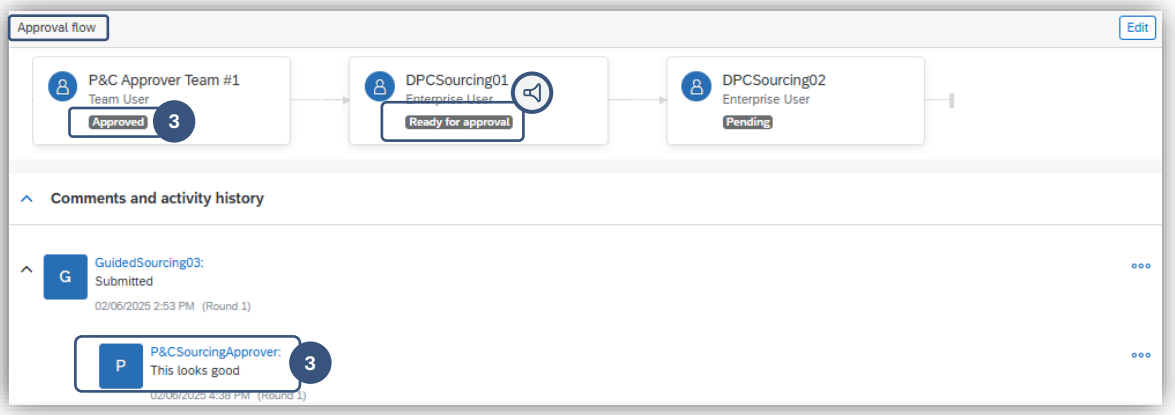
3 If the approver clicks **Approve**, the status of that user or approval group in the approval flow will change to **Approved**. If one member of an approval group approves, the Task will be removed from the other members' **To Do** portlets. The Sourcing Project Owner is notified that the document has been approved by an approver in that approval group. The **Comments and active history** section will show which actual user approved it from that approval group.

Ready for approval in an approval node indicates that the user or group is the active approver. **Pending** indicates that user or group will be able to approve after previous approvals have been made.



4 If the approver clicks **Reject**, a new round of approvals starting from the beginning of the approval workflow will be necessary. Approvers should include a message on the subsequent page explaining the specific reasons for the denial. If necessary, the approver can include an edited document to return to the Sourcing Project Owner by selecting **Attach a file** and uploading the revised document.

A. The Sourcing Project Owner will be notified that the task was rejected, and they will need to conduct a new round of approvals once the feedback has been addressed. All required approvers will see the document(s) again with any changes made by the Sourcing Project Owner in response to the denial, and the approvers will once again have to select **Approve** or **Reject** for the task.

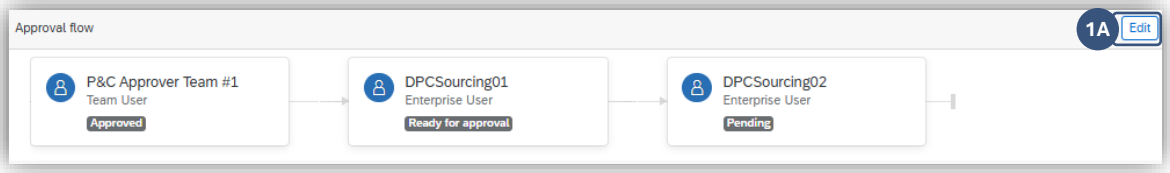
When conducting a new round of approvals, the Sourcing Project Owner should include in the **Comments** field of the Task the specific changes that have been made since the previous approval round. This will help all approvers determine if they need to re-review the document(s) or if they can just approve if the areas they are focused on did not change since the last approval round.

Review and Approval Tasks

Manually Adding Approvers to the Approval Flow

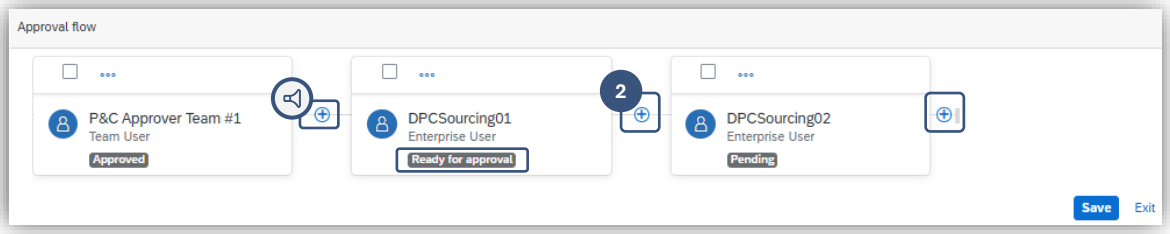
1 Approvers have the ability to manually add other approvers to the approval flow in addition to the automatically-added approvers. Approvers can be added before or after the current approvers, with different impacts to the overall approval flow.

A. After opening the **Task**, scroll down to the **Approval Flow** section. To start manually adding an approver/reviewer click the **Edit** button.



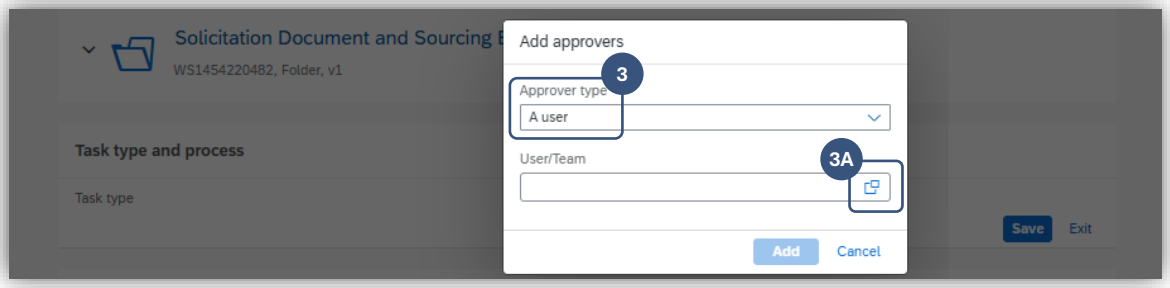
2 Click the blue plus icon at the position in the approval flow where the new approver will approve.

When adding an approver before the Active (**Ready for approval**) approver, the new approver will become the Active approver. The previous Active approver will move into a **Pending** status and will not be able to approve until the new approver completes their approval.



3 On the subsequent **Add approvers** screen, the Approver **type** of **A user** will default. Although there are other options available by clicking the down arrow in that field, always select **A user**.

A. In the **User/Team** field, click the popout icon on the right side to search for the specific user or group to add to the approval flow.



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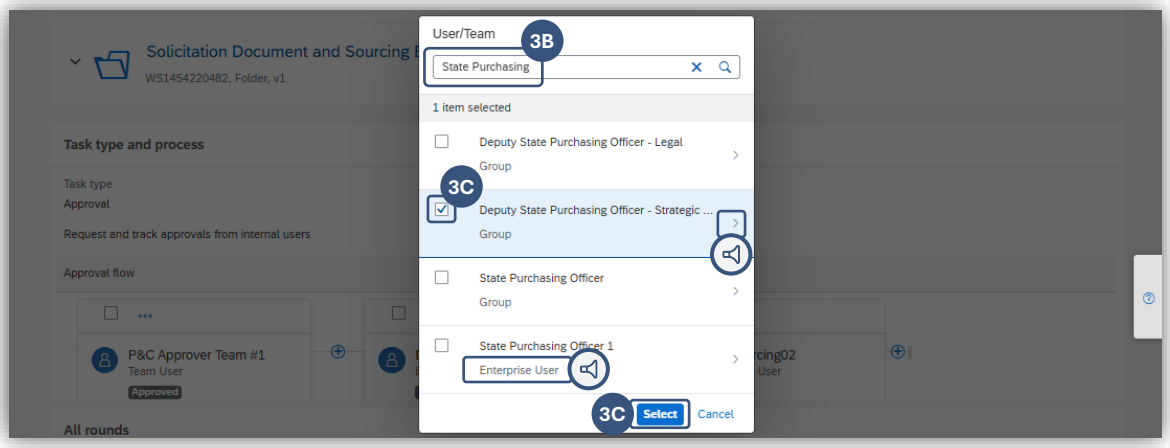
B. Enter the name of the individual or group in the search field at the top of the pop out box.

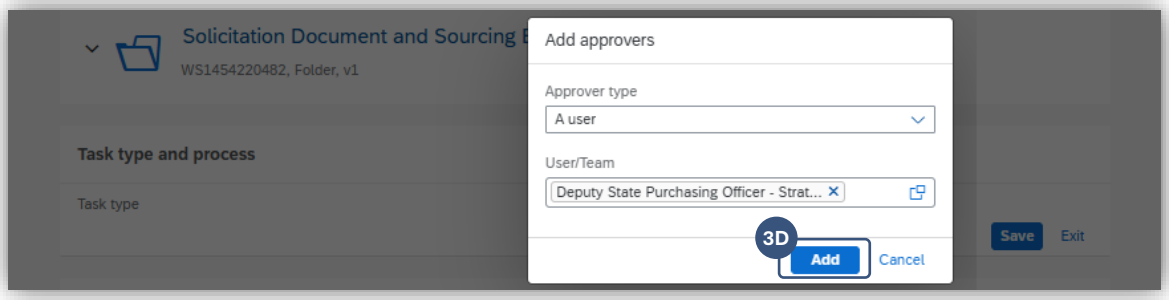
C. Check the box to the left of the user or group to add, then click **Select**.

Enterprise User or **Group** below the name of each selection will indicate whether the approver being added is an individual or group. Do NOT add a **Supplier User** to the approval flow.

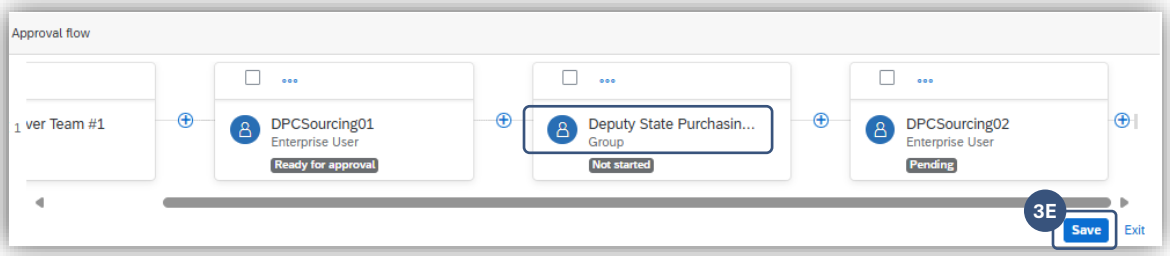
To find out more information about the user or group – like an email address to confirm the correct approver is being added – click the arrow to the right of the approver's name.



D. After populating the **User/Team** field, click the **Add** button.



E. Click **Save** in the bottom right to save the updated approval flow.



It is important that any user added to the approval/review flow also be added to the **Team** section of the Sourcing Project if they were already not included. If the user is not listed in the **Team** section, the user will be able to see the approval request but not all of the important details they might need to consider during their approval decision.

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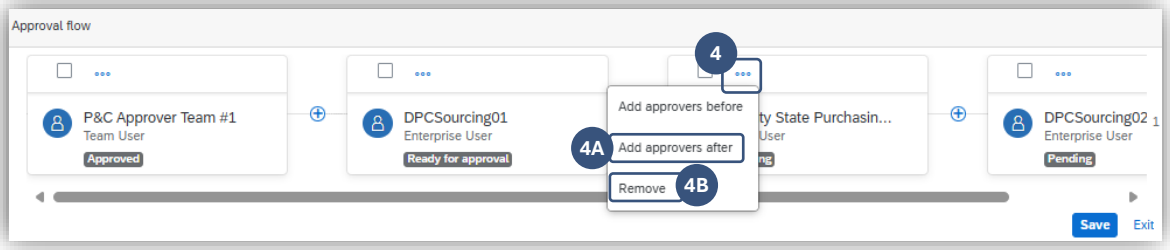
4 The approval flow can also be updated by clicking the three dots at the top of an existing approval node instead of clicking on a blue plus icon.

A. Select **Add approvers before** or **Add approvers after** to insert an approver in that direction of the selected node.

B. Manually-added approvers can be removed by the approver who added them by clicking the three dots in the approval node and selecting **Remove**.



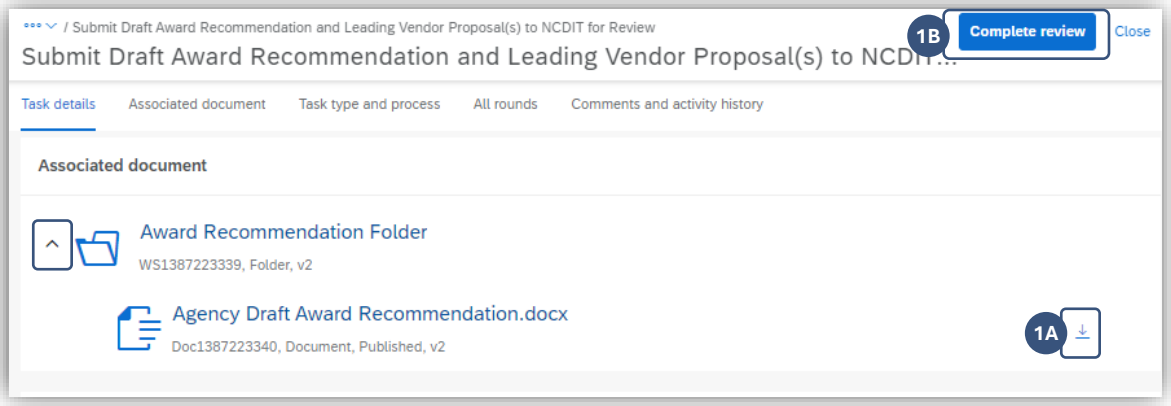
Review and Approval Tasks

Review Tasks

1 Review Tasks allow reviewers to edit and comment on Sourcing Project documents.

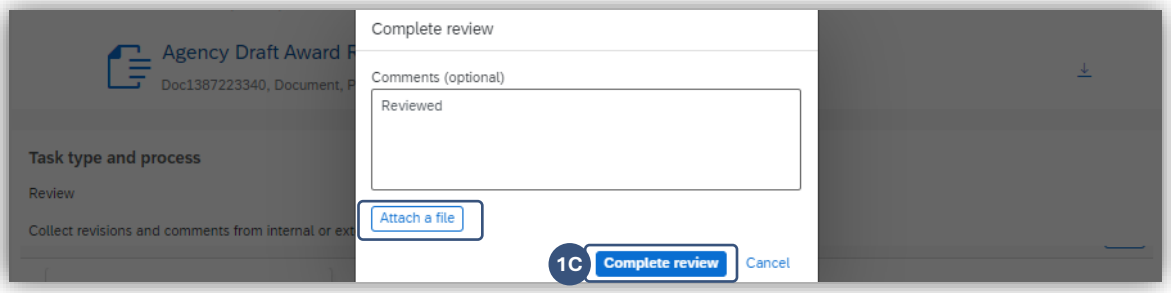
A. After opening the **Task**, the reviewer can download the document(s) sent for review by scrolling down to the **Associated document** section, expanding the folder, and clicking the download icon to the right of the document name.

B. After reviewing the document(s), the reviewer can indicate the review is complete by clicking the **Complete Review** button.



C. After clicking **Complete Review**, reviewers can add comments or attachments and then click the **Complete Review** button again.

If a reviewer has not completed their review by the requested **Due Date**, the user who submitted the task has been instructed to reach out directly to the reviewer to ask them to complete the review so that they may move on to the next task.



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