

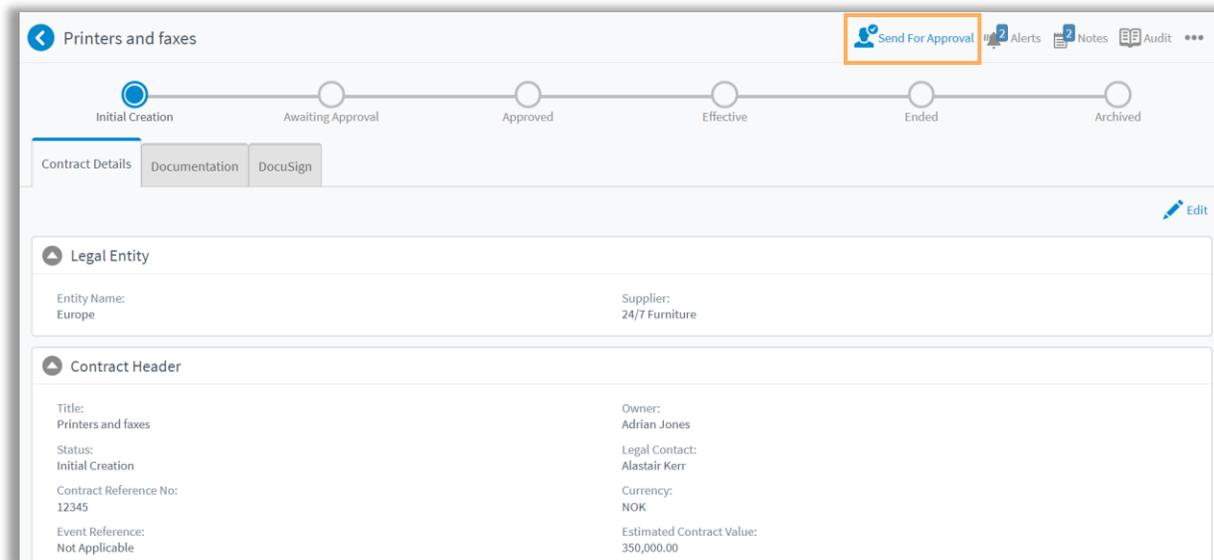
# Approvals in Contract Management

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

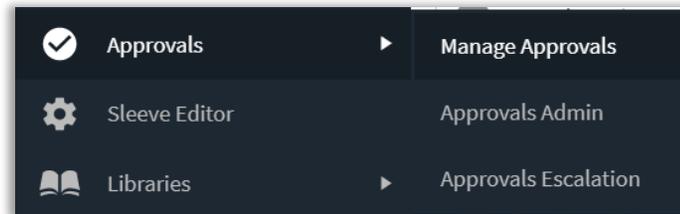
Once a contract has been created, if you have approvals set up, you will be required to send the contract for approval. To do this, click **Send For Approval** at the top right of the screen:



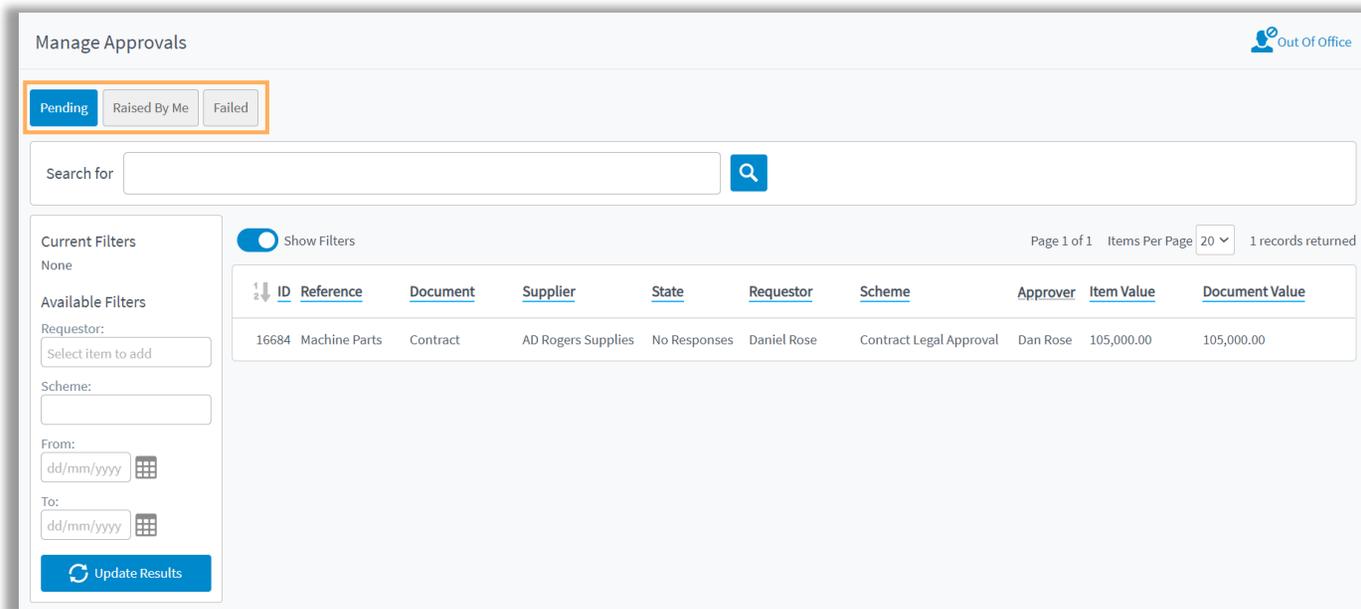
**Note:** Sending a contract for approval will trigger the predefined approvals route and will notify the relevant person or people that they have a contract to either approve or reject.

## 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.



The screenshot shows the 'Manage Approvals' interface. At the top, there are three tabs: 'Pending' (highlighted with an orange box), 'Raised By Me', and 'Failed'. Below the tabs is a search bar with a magnifying glass icon. On the left, there are filter options: 'Current Filters' (None), 'Available Filters' (Requestor, Scheme, From, To), and an 'Update Results' button. On the right, there is a 'Show Filters' toggle, pagination information ('Page 1 of 1', 'Items Per Page 20', '1 records returned'), and a table of approval records.

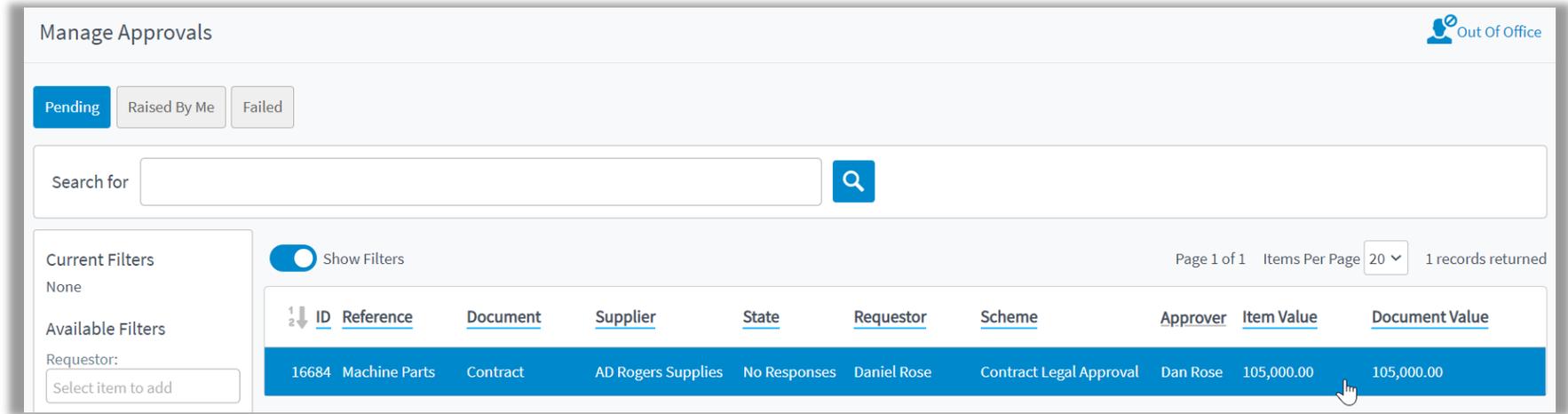
ID	Reference	Document	Supplier	State	Requestor	Scheme	Approver	Item Value	Document Value
16684	Machine Parts	Contract	AD Rogers Supplies	No Responses	Daniel Rose	Contract Legal Approval	Dan Rose	105,000.00	105,000.00

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.



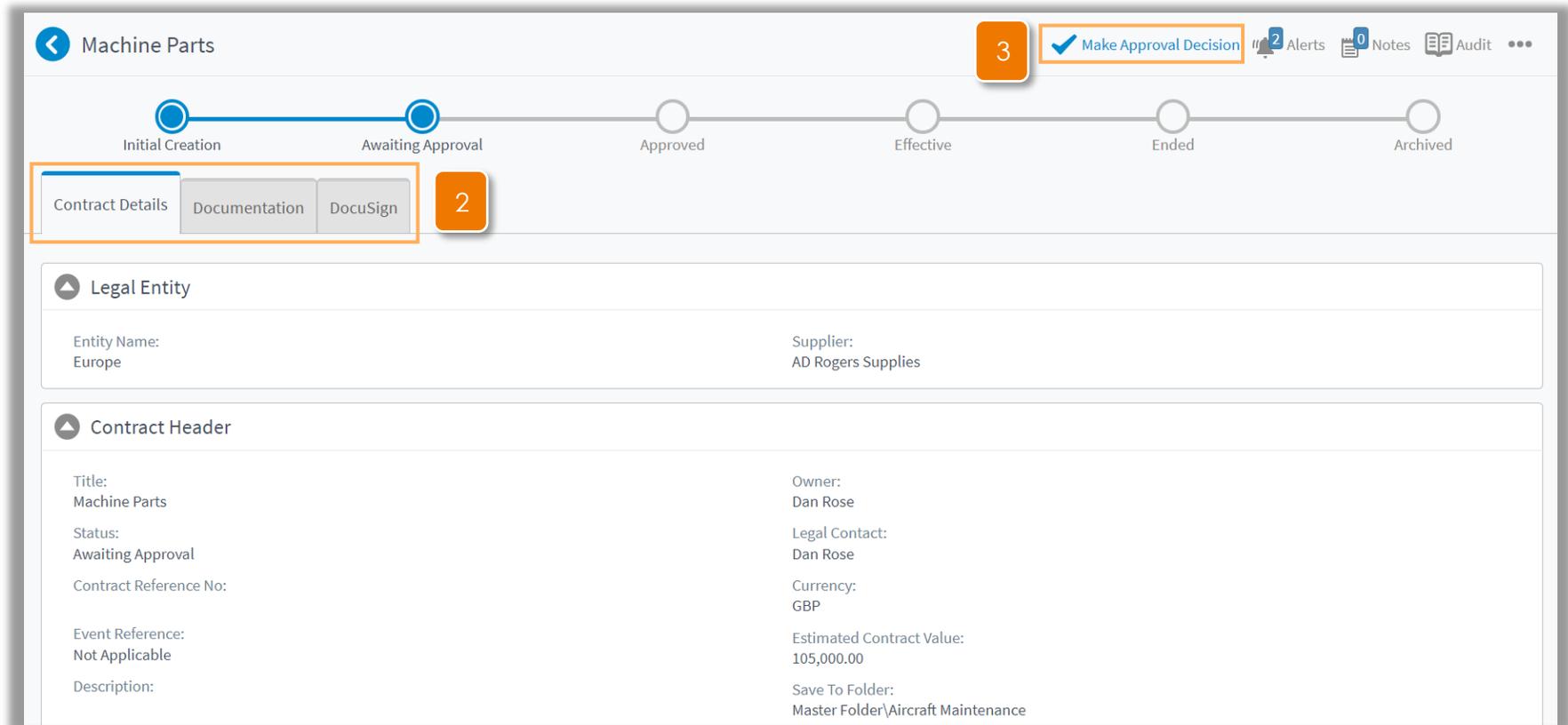
The screenshot shows the 'Manage Approvals' interface. At the top, there are tabs for 'Pending', 'Raised By Me', and 'Failed'. Below the tabs is a search bar with a magnifying glass icon. On the left, there are filter options under 'Current Filters' (None) and 'Available Filters' (Requestor: Select item to add). A 'Show Filters' toggle is visible. The main area displays a table with the following columns: ID, Reference, Document, Supplier, State, Requestor, Scheme, Approver, Item Value, and Document Value. The table contains one record with the following data:

ID	Reference	Document	Supplier	State	Requestor	Scheme	Approver	Item Value	Document Value
16684	Machine Parts	Contract	AD Rogers Supplies	No Responses	Daniel Rose	Contract Legal Approval	Dan Rose	105,000.00	105,000.00

Page 1 of 1 | Items Per Page 20 | 1 records returned

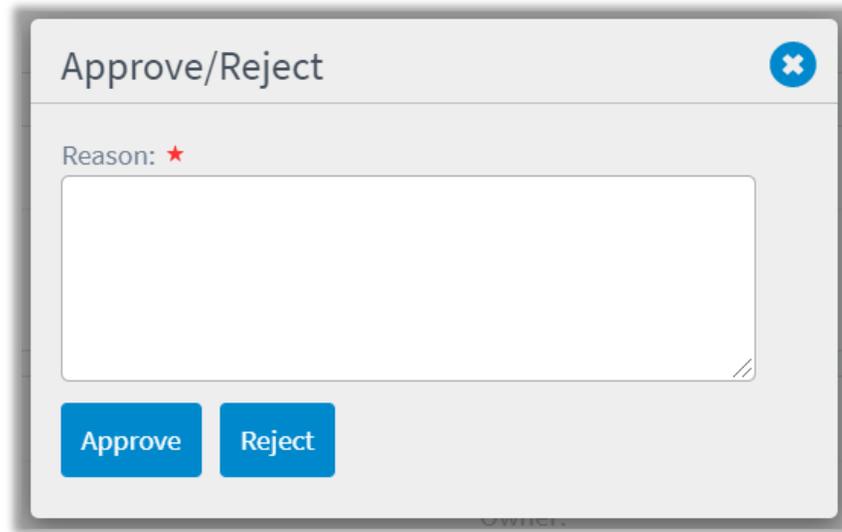
2. Navigate between the contract tabs to check if the contract details are documentation is correct.

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



The screenshot displays the 'Machine Parts' interface. At the top, a navigation bar includes a back arrow, the title 'Machine Parts', and a 'Make Approval Decision' button with a checkmark, which is highlighted with an orange box and a '3' callout. To the right of this button are notification icons for Alerts (2), Notes (0), and Audit. Below the navigation bar is a workflow progress bar with six stages: 'Initial Creation', 'Awaiting Approval', 'Approved', 'Effective', 'Ended', and 'Archived'. The 'Awaiting Approval' stage is currently active, indicated by a blue circle and line. Below the workflow bar is a tabbed interface with three tabs: 'Contract Details', 'Documentation', and 'DocuSign'. The 'Contract Details' tab is selected and highlighted with an orange box, with a '2' callout next to it. The main content area is divided into two sections: 'Legal Entity' and 'Contract Header'. The 'Legal Entity' section shows 'Entity Name: Europe' and 'Supplier: AD Rogers Supplies'. The 'Contract Header' section shows 'Title: Machine Parts', 'Status: Awaiting Approval', 'Contract Reference No:', 'Event Reference: Not Applicable', 'Description:', 'Owner: Dan Rose', 'Legal Contact: Dan Rose', 'Currency: GBP', 'Estimated Contract Value: 105,000.00', and 'Save To Folder: Master Folder\Aircraft Maintenance'.

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.

A screenshot of a web application popup window titled "Approve/Reject". The window has a light gray background and a blue close button in the top right corner. Below the title bar, there is a label "Reason: ★" followed by a large, empty white text input box. At the bottom of the popup, there are two blue buttons: "Approve" on the left and "Reject" on the right.

Approve/Reject

Reason: ★

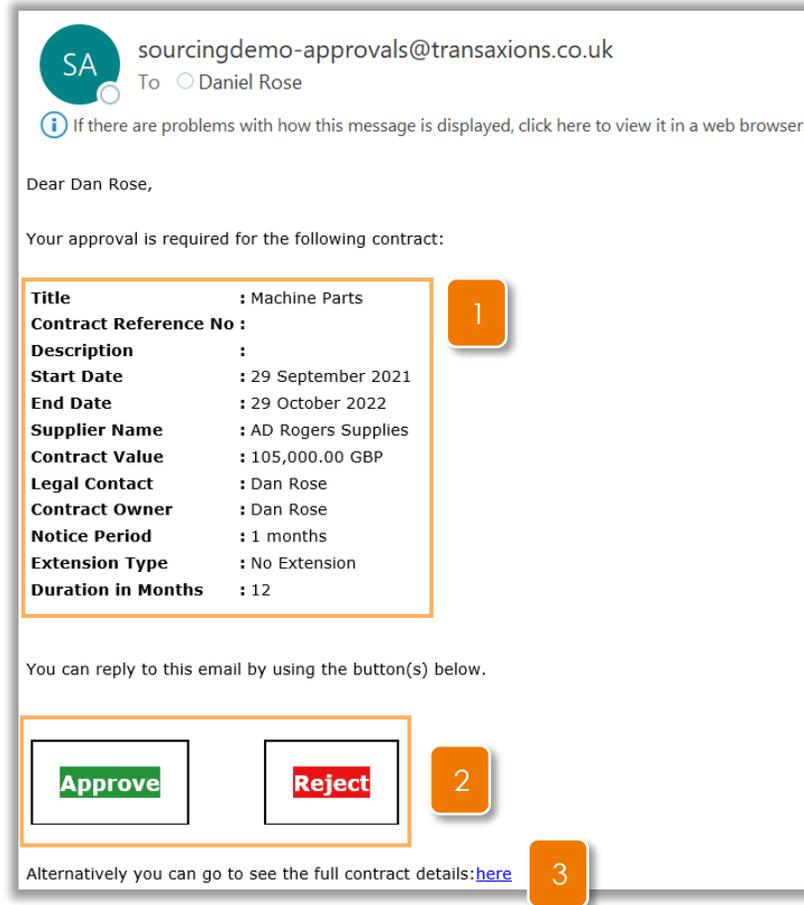
Approve Reject

## 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.



sourcingdemo-approvals@transaxions.co.uk  
To Daniel Rose

If there are problems with how this message is displayed, click here to view it in a web browser.

Dear Dan Rose,

Your approval is required for the following contract:

<b>Title</b>	: Machine Parts
<b>Contract Reference No</b>	:
<b>Description</b>	:
<b>Start Date</b>	: 29 September 2021
<b>End Date</b>	: 29 October 2022
<b>Supplier Name</b>	: AD Rogers Supplies
<b>Contract Value</b>	: 105,000.00 GBP
<b>Legal Contact</b>	: Dan Rose
<b>Contract Owner</b>	: Dan Rose
<b>Notice Period</b>	: 1 months
<b>Extension Type</b>	: No Extension
<b>Duration in Months</b>	: 12

You can reply to this email by using the button(s) below.

**Approve** **Reject**

Alternatively you can go to see the full contract details: [here](#)

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 below.

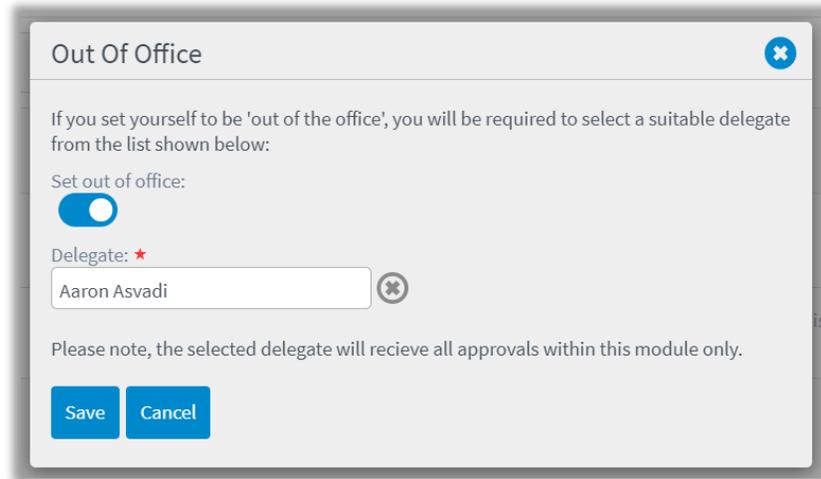
1. Click the **Out of Office** icon in the top right of the screen:

The screenshot shows the 'Manage Approvals' interface. In the top right corner, there is an 'Out of Office' icon, which is highlighted with an orange border. Below the header, there are filter buttons for 'Pending', 'Raised By Me', and 'Failed'. A search bar is present with a magnifying glass icon. On the left, there are sections for 'Current Filters' (None) and 'Available Filters' (Requestor: Select item to add). A 'Show Filters' toggle is visible. The main area displays a table with the following data:

ID	Reference	Document	Supplier	State	Requestor	Scheme	Approver	Item Value	Document Value
16684	Machine Parts	Contract	AD Rogers Supplies	No Responses	Daniel Rose	Contract Legal Approval	Dan Rose	105,000.00	105,000.00

Page 1 of 1 | Items Per Page 20 | 1 records returned

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.

A screenshot of a web application popup titled "Out Of Office". The popup has a light gray background and a blue close button in the top right corner. The text inside reads: "If you set yourself to be 'out of the office', you will be required to select a suitable delegate from the list shown below:". Below this is a section labeled "Set out of office:" with a blue toggle switch that is currently turned on. Underneath is a "Delegate:" label with a red asterisk, followed by a text input field containing the name "Aaron Asvadi" and a blue close button. At the bottom, there is a note: "Please note, the selected delegate will receive all approvals within this module only." and two blue buttons labeled "Save" and "Cancel".

Out Of Office

If you set yourself to be 'out of the office', you will be required to select a suitable delegate from the list shown below:

Set out of office:

Delegate: \*

Aaron Asvadi

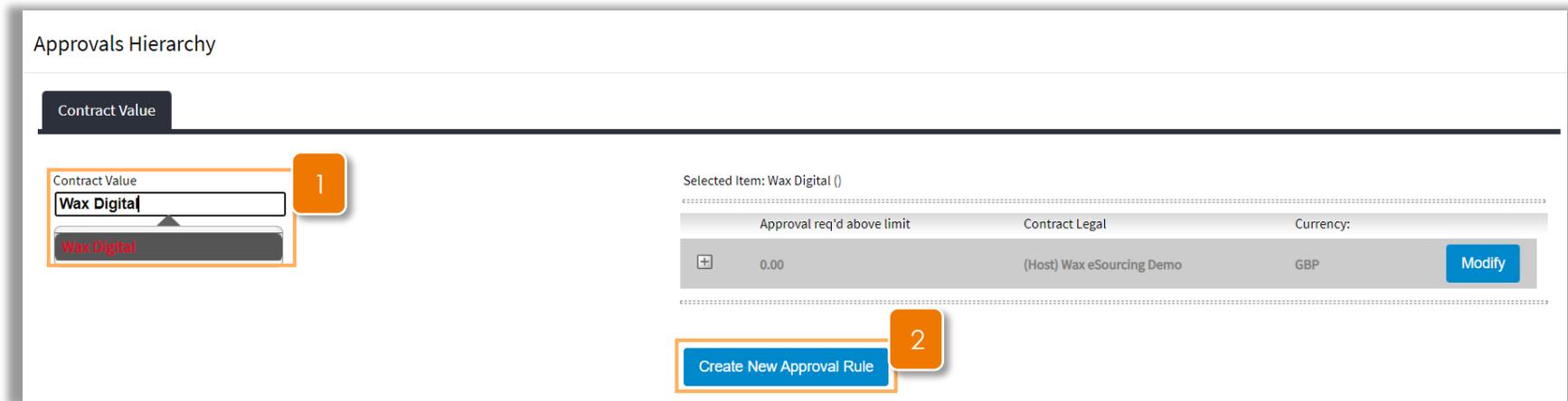
Please note, the selected delegate will receive all approvals within this module only.

Save Cancel

## 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.



Approvals Hierarchy

Contract Value

Contract Value

Wax Digital

Wax Digital

Selected Item: Wax Digital ()

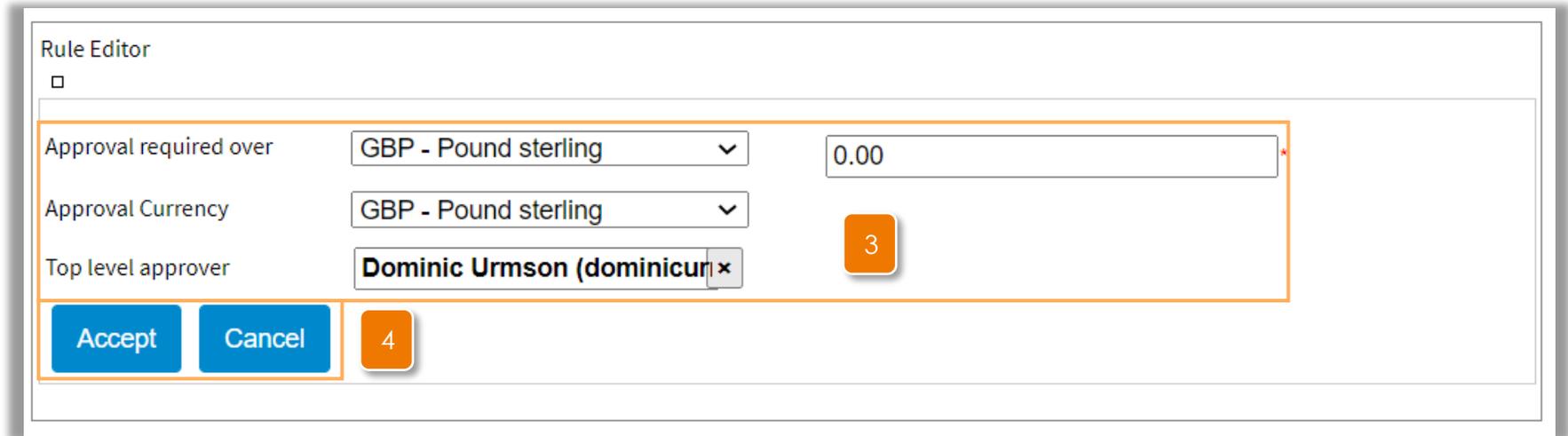
Approval req'd above limit	Contract Legal	Currency:
+ 0.00	(Host) Wax eSourcing Demo	GBP

Modify

Create New Approval Rule

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**.



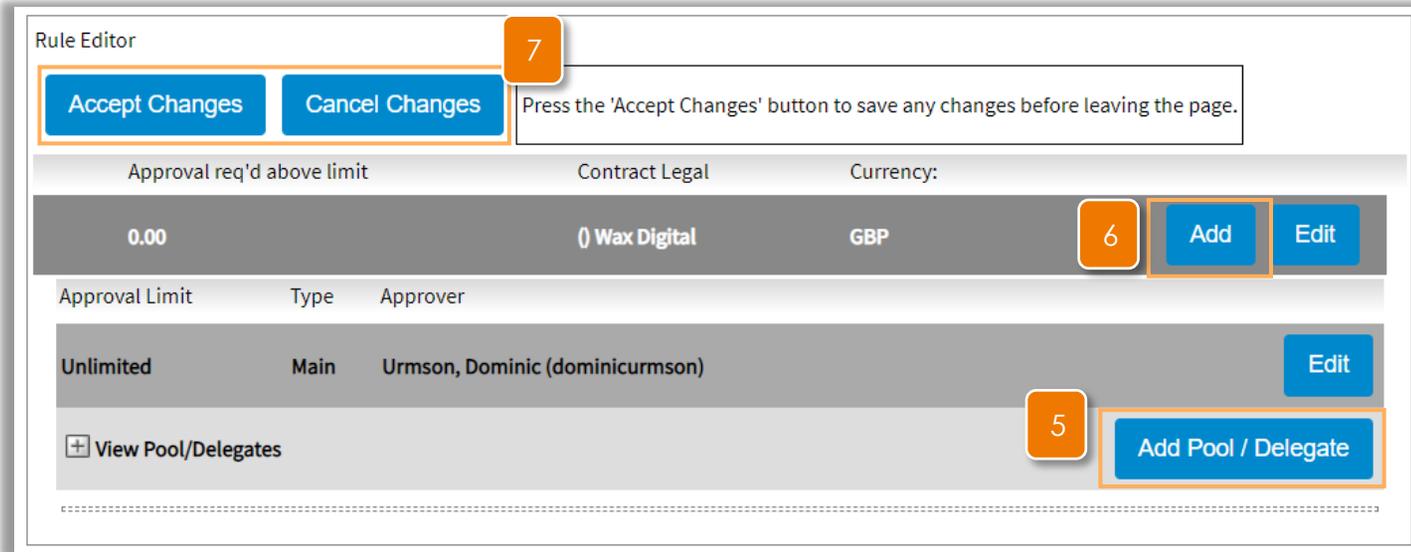
The screenshot shows a 'Rule Editor' window with a collapse icon (square) at the top left. The main content area is enclosed in a white box with a thin border. Inside this box, there are three rows of configuration fields:

- Approval required over:** A dropdown menu set to 'GBP - Pound sterling' and a text input field containing '0.00'.
- Approval Currency:** A dropdown menu set to 'GBP - Pound sterling'.
- Top level approver:** A dropdown menu set to 'Dominic Urmson (dominicur)' with a close icon (x) on the right.

Below these fields are three buttons: a blue 'Accept' button, a blue 'Cancel' button, and an orange button with the number '4'. To the right of the configuration fields, there is an orange button with the number '3'.

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.



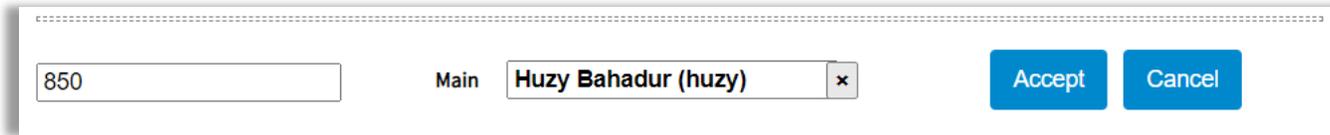
The screenshot shows the 'Rule Editor' interface. At the top, there are two buttons: 'Accept Changes' and 'Cancel Changes', both highlighted with an orange box and labeled with a '7'. A text box next to them contains the instruction: 'Press the 'Accept Changes' button to save any changes before leaving the page.' Below this, there are three columns: 'Approval req'd above limit' with a value of '0.00', 'Contract Legal' with a dropdown menu showing '() Wax Digital', and 'Currency:' with a value of 'GBP'. To the right of these columns are two buttons: 'Add' and 'Edit', both highlighted with an orange box and labeled with a '6'. Below this, there is a table with columns 'Approval Limit', 'Type', and 'Approver'. The table has one row with 'Unlimited', 'Main', and 'Urmson, Dominic (dominicurmson)'. To the right of this row is an 'Edit' button. Below the table is a '+ View Pool/Delegates' link and an 'Add Pool / Delegate' button, both highlighted with an orange box and labeled with a '5'.

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.



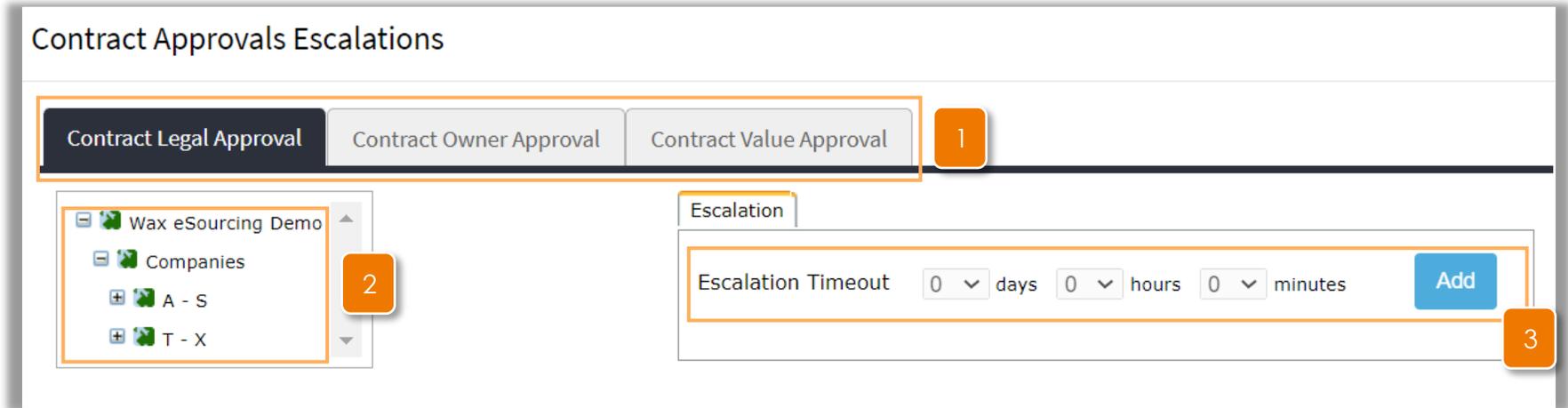
Selected Item: Wax Digital ()				
Approval req'd above limit	Contract Legal	Currency:		
0.00	() Wax Digital	GBP	10	Copy Edit Delete

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.



Contract Approvals Escalations

Contract Legal Approval | Contract Owner Approval | Contract Value Approval 1

Wax eSourcing Demo  
Companies 2  
A - S  
T - X

Escalation  
Escalation Timeout 0 days 0 hours 0 minutes Add 3

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