

Approving A Contract Request

The Contract Request form consists of completing some preliminary questions (contract information, supplier, etc.) and attaching supporting documents. Once submitted, the Contract Request will be forwarded to the appropriate reviewers to review and approve.

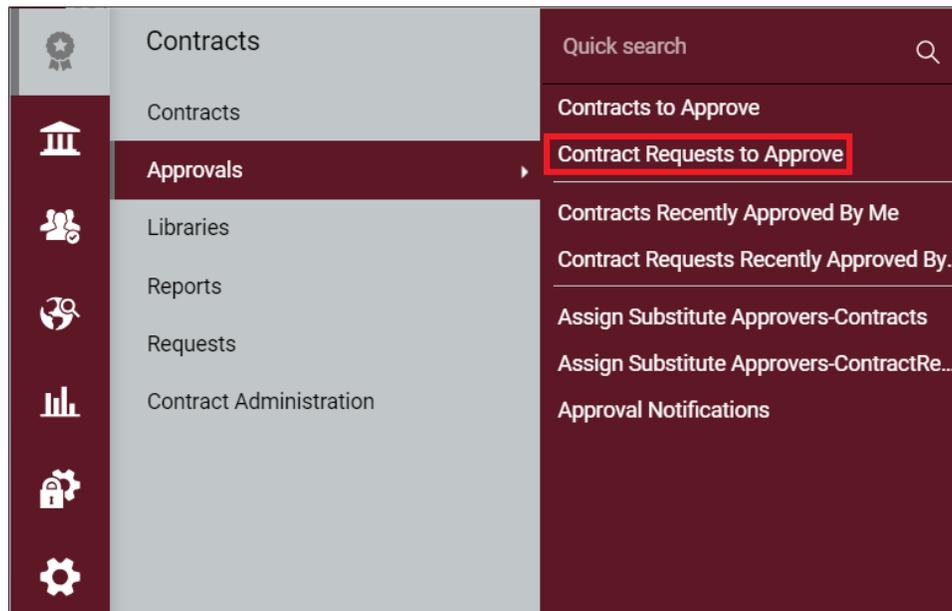
APPROVE A CONTRACT REQUEST FORM

Contract request form can be approved in multiple ways:

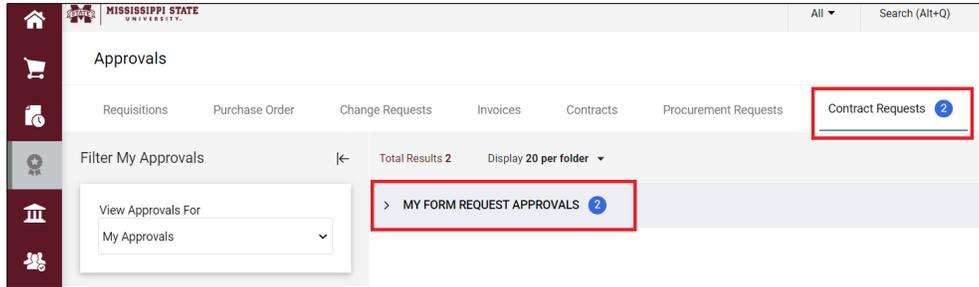
- A. Through Contract Request Approvals
- B. Through Action Items

A. Through Contract Request Approvals:

Step 1: Click Contracts > Approvals > Contract Requests to Approve.



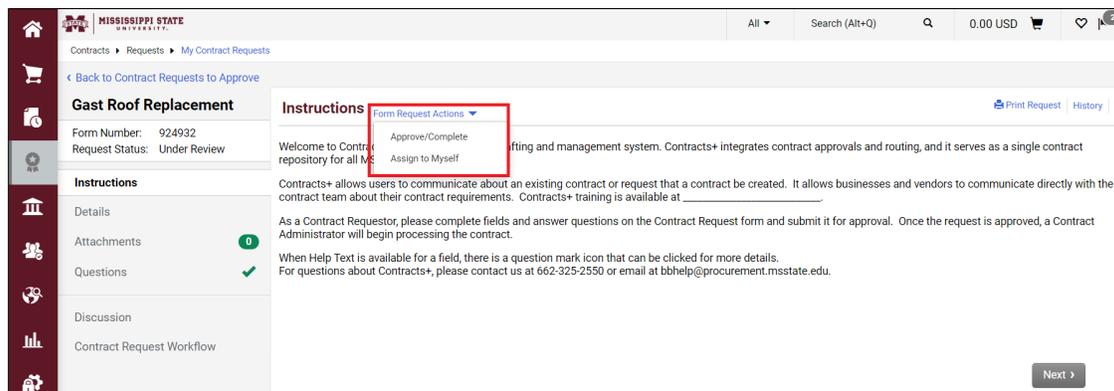
Step 3: Select an Approval Folder to view details of Contract Request form that need your approval.



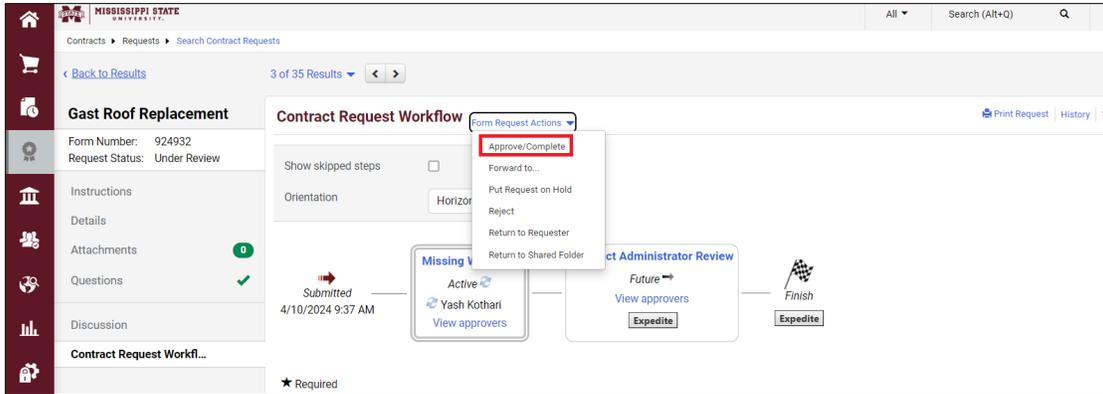
Step 4: To open the Contract Request form, click on the “Form Number”.

MY FORM REQUEST APPROVALS 2							
FORM NUMBER	NAME	TEMPLATE NAME	REQUESTER	ASSIGNED APPROVER	REQUEST DATE/TIME		
<input type="checkbox"/>	924932	Gast Roof Replacement	Contract Request	Hester, Lee	Yash Kothari	4/10/2024 9:37 AM	Approve
Folders 0 Days in folder [My Form Request Approvals]							
<input type="checkbox"/>	919814	Professional services for implementation of JAGGAER	Contract Request	Wohlfarth, Robert	Yash Kothari	3/27/2024 12:52 PM	Approve

Step 5: Click on “Form Request Actions” dropdown & click on “Assign To Myself” before starting to review the Contract Request form.



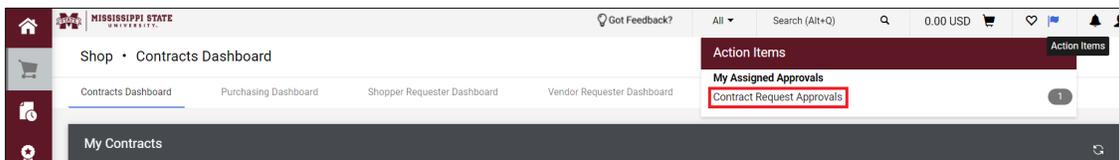
Step 6: Review all the information provided in the different sections of form, once reviewed. Click on “Approve/Complete” (Note: Please refer Appendix for description of different Approval actions).



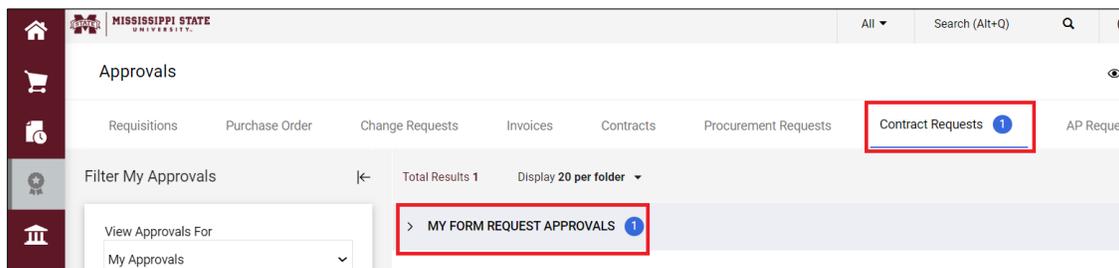
B. Through Action Items:

Step 1: Enter your ID and Password to Login.

Step 2: Click on the “Action Items” icon at the top right of the home screen and select “Contract Request Approvals” to locate Contract Requests that are pending your approval.



Step 3: Select an Approval Folder to view details of Contract Request form that need your approval.



Step 4: To open the Contract Request form, click on the “Form Number”.

Total Results 1 Display 20 per folder ▾

▼ MY FORM REQUEST APPROVALS 1

<input type="checkbox"/>	FORM NUMBER	NAME	TEMPLATE NAME	REQUESTER	ASSIGNED APPROVER	REQUEST DATE/TIME
<input type="checkbox"/>	919814	Professional services for implementation of JAGGAER	Contract Request	Wohlfarth, Robert	Yash Kothari	3/27/2024 12:52 PM

Step 5: Click on “Form Request Actions” dropdown & click on “Assign To Myself” before starting to review the Contract Request form.

The screenshot shows the 'Professional services for implementation of JAGGAER' form. The 'Form Request Actions' dropdown menu is open, and 'Assign to Myself' is highlighted. The form includes instructions, form details (Form Number: 919814, Request Status: Under Review), and a sidebar with navigation options like Details, Attachments, Questions, Discussion, and Contract Request Workflow.

Step 6: Review all the information provided in the different sections of form, once reviewed. Click on “Approve/Complete”.

The screenshot displays the 'Contract Request Workflow' diagram. The workflow starts with 'Submitted 3/27/2024 12:52 PM' and proceeds through several steps: 'New Vendor Setup' (Active, Yash Kothari), 'View approvers', 'Org Approval 2' (Future), 'Org Approval 4' (Future), and 'Contract Administrator Review' (Future). The 'Approve/Complete' button is highlighted in the 'Form Request Actions' dropdown menu. The workflow ends with a 'Finish' step.

Approval Actions:

Note – Below options will appear as per role permissions in user profile.

- **Add Ad-Hoc Step** - This action allows to add the extra Approver in the Workflow.
- **Approve/Complete Step** - This action approves and completes the current workflow step. This action is available if you are viewing a pending approval in your My Approvals folder (one that is already assigned to you).
- **Forward To** – This action forwards the Approval to another User/Approver.
- **Put request on Hold** - This action places the Contract request form on hold so it cannot go forward in workflow. A Hold icon is displayed for the workflow step.
- **Reject** - This action rejects the Contract request in the workflow. Note: Rejecting the Contract request form will completely make it non-editable for the Contract Requestor.
- **Return to Requestor** - This action returns the Contract request form back to the Requestor for updating or editing.
- **Return to Shared Folder** - When a Contract request form is assigned to the user, selecting this option will return it to the appropriate workflow folder for the step.