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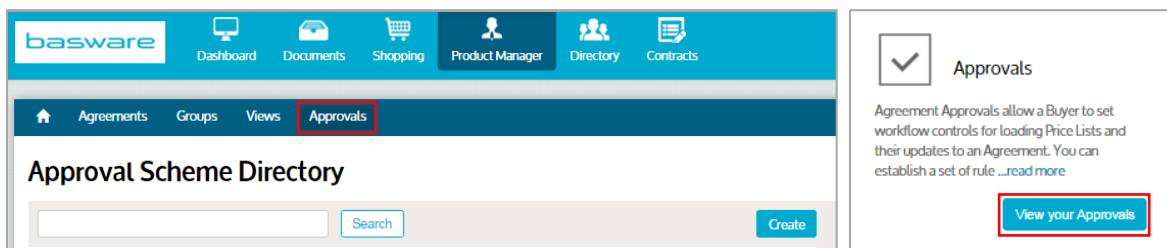
Summary

Approval Schemes enable you to control who should approve price lists, and in what circumstances. You can set up to 5 levels of rules that can be combined to create sophisticated approval schemes based on the addition or removal of items, and price rises or price reductions. Multiple individuals can be informed via email when a rule is breached.

You can only assign one Approval Scheme to an Agreement. Approval Schemes can be used multiple times across multiple Agreements reducing the need to set and manage an Approval scheme for every Agreement your Organisation may have.

Accessing Approval Schemes

You can access Approval Schemes via Product Manager. Select the 'Approvals' menu options on the secondary menu bar or via the Approvals link on the Product Manager home page.



This will display a directory of your Agreement Schemes. You can access and edit Approval Schemes from here or create a new one.

Create a new Approval Scheme

Click 'Create' to access the Create Approval Scheme page as shown below:

1. Define a name and a description of your Approval Scheme so it is easily recognisable to you and your administration team
2. Once complete, click 'Save' to build your scheme.

You will be presented with the below screen which will display a 'Default level' rule. The Default rule is mandatory for any Approval Scheme.

Auto Approve

- A. If the Auto Approve toggle is switched to 'On' any changes made to your Agreements will be automatically approved and updates will feed in to the Marketplace
- B. If the Auto Approve toggle is switched to 'Off', you must select at least one Buyer Administrator from the list to approve the changes to your Agreement Price List. This will flag any item price changes or new or removed items (Approval rules are outlined later in the document)

- C. If the Auto Approve toggle is switched to 'On' and you have also selected one or more Buyer Administrators, the updates will be automatically approved and a notification email will be sent to those selected approvers. No action needs to be taken. The changes will still be auto-approved and published to the Marketplace.

NOTE: You will not be able to save the scheme until one of the above scenarios have been met.

Select a Notifier or Approver

To select a Buyer Administrator to be an Approver or a Notifier (if the Approval Scheme is set to auto-approve) of any changes to the Agreement Price List click the '+' button which will present a window and a list of Buyer Administrators in your organisation.

Default Level	Rules	Notify	Auto <input checked="" type="checkbox"/>	<input type="button" value="+"/>
	Default			
				<input type="button" value="Add level"/>

Select the required names and click 'Save'

Darryl Owen
darryl.owen1@procserve.org ✓

Duncan Nash
duncan.nash@procserve.com ✓

Edwin Otoo
edwin.otoo@procserve.com

NOTE: You can select more than one Approver for each rule you create. The first Approver to approve the changes will complete the approval action. Any other Approvers linked with the Scheme will not need to take any action.

The below illustrates the Default Level with Automatic Approval switched **on** and two Notifier's assigned who will be notified by email of changes but will not require any action.

Default Level	Rules	Notify	Auto <input checked="" type="checkbox"/>	<input type="button" value="+"/>
	Default	<input type="text" value="duncan.nash@procserve.com"/> ✕		
		<input type="text" value="darryl.owen1@procserve.org"/> ✕		
				<input type="button" value="Add level"/>

Buyers Guide to Creating Approvals



The below illustrates the Default Level with Automatic Approval switched **off** and two Approvers assigned and one of whom must approve the changes before they are applied to the Marketplace.

Default Level	Rules	Approvers	Auto	
	Default	<input type="text" value="duncan.nash@procserve.com"/>	<input type="checkbox"/>	<input type="button" value="+"/>
		<input type="text" value="darryl.owen1@procserve.org"/>		

Approval Rules

If required you can now build up additional approval levels (up to 4 levels) in which you can assign one or more of the following rules to each level:

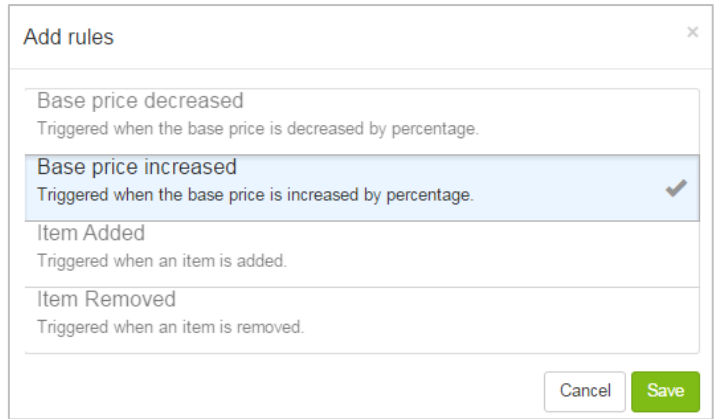
- **Base Price Increased** –specify the % increase you want to trigger the rule
- **Base Price Decreased** –specify the % decrease you want to trigger the rule
- **Item Added** – triggered when a new item has been added to the Price List
- **Item Removed** – triggered when an existing item has been removed from the Price List

To add a new approval level, click and a new row 'Level 1' will be displayed as below:

Default Level	Rules	Approvers	Auto	
	Default	<input type="text" value="duncan.nash@procserve.com"/>	<input type="checkbox"/>	<input type="button" value="+"/>
		<input type="text" value="darryl.owen1@procserve.org"/>		

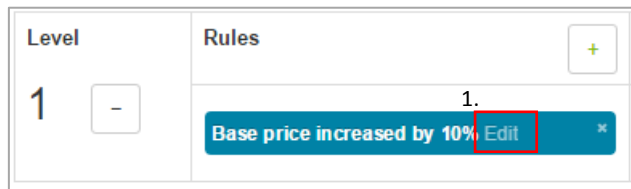
Level	Rules	1.	Approvers	
1	<input type="button" value="-"/>	<input type="button" value="+"/>	<input type="button" value="+"/>	
	At least one rule must be added.		At least one approver must be added.	

1. To add a new rule to the level, Click the '+' button in the rules section.

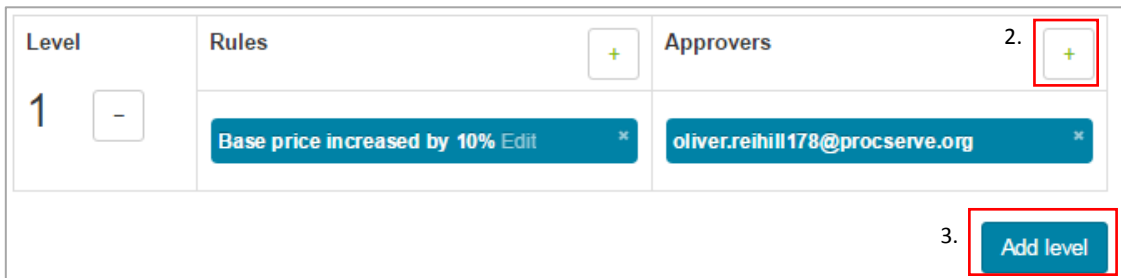


2. A pop-up window will be displayed. You may select one or more rules per level you would like to validate.
3. Click 'Save'

In the example below, 'Base price increased' has been added to the rule level to alert an Approver of any price increases above a nominated %. In this case 10%.



1. To enter the price % value you want to trigger an alert, click 'Edit' and enter the numerical value only (no need to enter %, although it does accept a decimal). If you would like to see all price increases, enter 0% as your trigger level.



2. You must now assign a Buyer Administrator to approve the changes. Select the '+' button in the Approvers section to select one or more approvers.
3. You can continue to add levels, for example a larger price increase may go to a different Approver or any new items added may be another Approval rule which can go to the same or different Approvers.

NOTE: Rules are triggered in reverse order, i.e. the system will consider Level 5 before Level 4, and so on, until it reaches the default level (Level 1). Approvals and notifications are triggered when the first rule is broken.

Manage Approval Scheme

Standard Approval

Description: Standard Approval scheme to apply for Agreement updates

Auto Export: No

Save

Once you have completed creating the rules for your scheme, click 'Save'

NOTE: Only once you have fully completed the rules will you be able to save the scheme.

Adding a Scheme to an Agreement

To assign a custom scheme to an Agreement, navigate to your Agreement Directory via the menu:



1. Search for the required Agreement. Click the 'Manage' icon as shown below:

Agreements Directory

Showing 1-25 of 55 results for Agreements

DEV-8373	Supplier: NAZ LTD (737822218)	Type: Organisation Agreement	1.
	Status: Active	Last Modified: 14-Mar-16	
	Description: IT Agreement	Expires: Not set	

Sort by Last Modified
25 results per page

Show me

- ✓ All
- ✓ Organisation Agreements
- ✓ Punchout Agreements
- ✓ Shared Agreements

The site will load the Manage Agreement page below:

Manage Agreements Archive

DEV-8373

Type: Organisation Agreement Status: Active
Language: English Start Date: 14-03-2016
Currency: GBP - British Pounds Expiry Date:
Description: IT Agreement
Keywords: 8373

Attributes Contract Ref: 41232
Territory: UK

Approval Default Approval Scheme 2. 3.

2. Every Agreement will automatically be assigned the 'Default Approval Scheme' until you allocate a custom scheme to the Agreement.
3. Select the 'Manage' icon in the Approval section to navigate to your Approval Scheme Directory as shown below:

Agreement Approval Scheme

Search Create Done

Showing 1-2 of 2 results for Approval Scheme

4.12.28 4.
Agreements: 1 Last Modified: 18-01-2016
Status: Published
Description: Testing

Default Approval Scheme [Default] 4.1.
Agreements: 105 Last Modified:
Status: Published
Description: Default Approval Scheme

4. To add the scheme to your Agreement click the '+' icon against the required Scheme. The Scheme selected will then display a 'tick' ✓ to indicate it has been selected and the number of Agreements it is associated to will increase by one.
 - 4.1 If you have not assigned a custom scheme to the Agreement you will see the Default Approval Scheme [Default] is selected automatically

NOTE: You are unable to view or change the Approval Scheme if the Agreement is 'Awaiting Approval'. You will clearly see the status of the Agreement as shown below:

Manage Agreements Review Update Archive

AN007

Type: Shared Agreement Status: Awaiting Approval

Currency: Start Date: 03-06-2015

Expiry Date: 17-06-2015

Description:

Message:

Keywords:

Attributes Contract Ref:

Territory: UK

Approval Default Approval Scheme

⚙️ Awaiting Approval (Default Level) ⚙️

In this case, selecting the 'Manage' icon will take you to the Agreement Item Details page to approve or reject the changes.

Once the Agreement has been approved or rejected, you will be able to access the Scheme and make changes to it or change the scheme assigned to the Agreement.

Manage and Edit Approval Schemes

The Agreement Approval Scheme page displays a list of your Organisation Approval Schemes. You can edit your schemes here.

Agreement Approval Scheme

Search Create Done

Showing 1-4 of 4 results for Approval Scheme


Default Approval Scheme ⚙️ +

Agreements: 2 Last Modified: 09-12-2015

Status: Published

Description: Default Approval Scheme

The Approval Scheme summary list will display the number of Agreements a Scheme is assigned to, the status of the Scheme (Draft or Published), the description and when it was last modified. The status of the Scheme will either be 'Draft' which is an incomplete Scheme or 'Published' which will be a saved Scheme.

You can edit the Scheme by clicking the 'Manage' icon  and editing the scheme as previously described.

Any changes made to the Approval Scheme will be automatically applied to all Agreements linked with that scheme.

Auto-Creation of Default Approval Scheme

Every Agreement needs an Approval Workflow in order to handle Price Lists, thus a Default scheme is created to enable this.

If an Agreement is created and an Approval Scheme does not yet exist, a 'Default Approval Scheme [Default]' will be created. .

A Default Approval Scheme will also be created when a Buyer Administrator accesses the Approval Schemes page even if no Agreements have been created yet.

This Default scheme will be automatically assigned to Agreements if a custom scheme is not.

The Default Approval Scheme will be set to 'Auto-Approve'. Any Agreements created which do not have a Scheme applied will be assigned the auto-approve Default Scheme unless the default has been changed by the Buyer Administrator.

A Buyer Administrator will be able to edit the Default Approval Scheme or create custom schemes to assign to Agreements.

Example Approval Scheme

An example of a multi-level approval scheme is outlined below:

Default Level	Rules	Notify Auto <input checked="" type="checkbox"/> +
1	Default	akin.akingboye@procserve.com ×
Level	Rules +	Approvers +
2	Base price increased by 10% Edit ×	oliver.reihill148@procserve.org × akin.akingboye@procserve.com ×
Level	Rules +	Approvers +
3 -	Item Added × Base price increased by 20.5% Edit ×	akin.akingboye@procserve.com ×

The screenshot displays a 3 level Approval Scheme.

The level 3 rule will be validated against the Price List changes first, before the Level 1 rule is checked against all items and finally the Default Level.

Level 3 will trigger if an item price increases by 20.5% or more and/or an item has been added to the Agreement Price List. The Approver assigned to this rule will be notified by email and must take action to review and approve or reject those changes.

If a set of items increased in price by 10% or more but less than 20.5%, an approval request will be triggered to the nominated Approver listed in the level 2 rule.

If neither of these rules have been triggered then the default settings will apply.