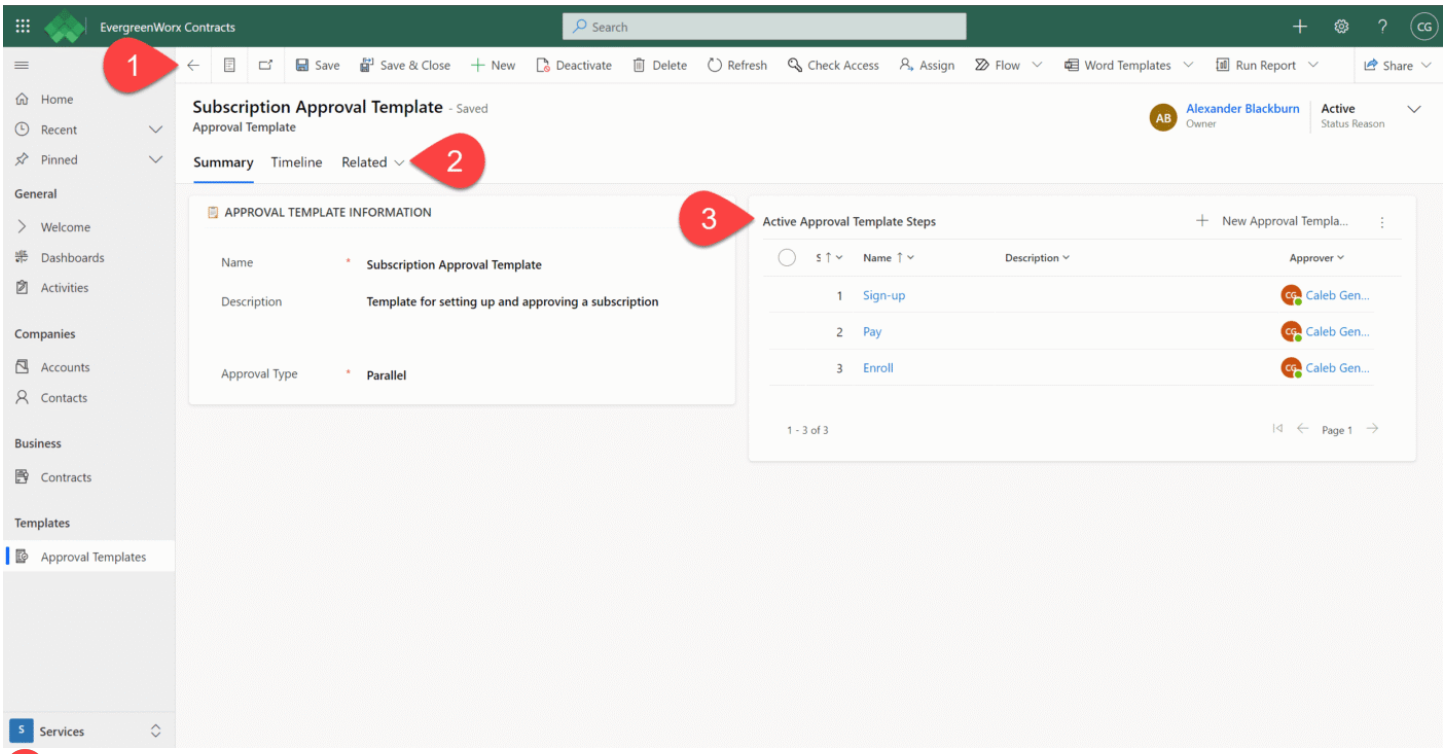
Approval Templates

Contracts Admin Guide · https://evergreenworx.com/docs/contract-approval-templates/

The main Approval Template record form stores key data about the steps that are necessary for approving a Contract and indicates which Contract types the template can be used on. Though some types of Contracts may not need a formal approval process, an Approval Template can standardize the process for moving a Contract from draft to active status.



1 In the ribbon, available actions are displayed for the current Approval Template record, such as deactivating the record, deleting the record, or running a report. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Approval Template record, you'll see the following tabs:

- Summary – Displays characteristic data such as the Name, Approval Type, and the template's Approval Steps. New steps for this Approval Template can be created from this grid using the **+ *New Approval Template Step***

- Timeline – Displays the Approval Template’s history such as the record’s creation, modification, Notes, Activities, and more. For more information, see Timeline | EvergreenWorx.
- Related – Other related items, such as Record Audit History and Activities.

3 Approval Steps are the tasks that are needed to be done to get a Contract approved for activation.