Approvals

The general document sign-off module — requesting approvals, and deciding as an internal or external approver.

- Overview
- Requesting an Approval
- Approving (Internal Staff)
- External Approvers

Overview

Approvals is COMS's general sign-off system. It lets someone send a record — a Sole-Source Justification, a Bidder List, a purchase, a project closure, and so on — to one or more people to formally approve or reject, with the decisions, comments and signatures captured as a permanent record.

> **ℹ Good to know:** This is a **separate module** from Expense approvals. Expense claims have their own approval chain (see the Expense Management guide); this guide is about the general **/approvals** area you reach from **Approvals** in the sidebar.

Who does what

- The **requester** creates a request, attaches supporting files, and chooses who must approve.
- **Internal approvers** (Conexus staff) review and decide inside COMS.
- **External approvers** (customer contacts) review and decide on the customer portal via a secure link.

What can be sent for approval

A request always has a **category** (SSJ, Bidder List, Purchase Order, Travel, Vacation, Hiring… — a long, admin-managed list) and can optionally be **linked to a record** so approvers see exactly what they're signing off. The four linkable record types:

Type	Typical use
Project	Project-level sign-offs (e.g. closure, technical completion).
Work Package	Work-package approvals.
Purchase Order	PO approvals.
Purchase Request	Procurement sign-offs — Sole-Source Justifications and Bidder Lists are the common ones.

ℹ **Good to know:** When the linked record is a Purchase Request with a Sole-Source Justification or Bidder List, the approval page shows the **full details** of that record (scope, QA requirements, reasons, the justified bidder and quote) so approvers have everything in front of them.

The lifecycle

Every request moves through a simple set of statuses:

Status	What it means
Pending	At least one approver still has to decide.
Completed	Everyone approved. A permanent Approval Confirmation PDF is generated. (Final.)
Rejected	Someone rejected it — that ends the request. (Final.)

A single **rejection ends the whole request**; every approver must approve for it to complete.

Finding your approvals

Open **Approvals** from the sidebar. The list is split into tabs:

- **Mine** — requests you created.
- **Awaiting Me** — requests waiting for *your* decision.
- **I've Acted On** — requests you've already approved or rejected.
- **All** — only for administrators (needs the *view-all* permission).

Each row shows the category, the linked record, an **approved / total** progress bar, the overall status, who requested it, and (for completed internal-only requests) a report download.

The Approvals list, showing categories, progress and status.

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💡 **Pro Tip:** Use the **Filters** bar to narrow by category, record type, status, whether an external approver is involved, or a date range — handy once you have a lot of history.

Requesting an Approval

This page covers creating an approval request, tracking it, and managing it through to completion.

Creating a request

From the Approvals list, click **New Approval Request** (the blue **+**). The form is one page, top to bottom:

The New Approval Request form.

The New Approval Request form.

Details

Field	Required?	Notes
Title	Yes	A short, clear name (max 255 characters).
Category	Recommended	What kind of approval this is. Pick the closest match; use *Other* if nothing fits.
Description	Optional	Context for the approvers (max 5000 characters).

Linked Record (optional)

Pick a **Type** (Project / Work Package / Purchase Order / Purchase Request), then search for the specific **Record**. Linking is optional, but it's what shows approvers the full context of what they're signing off.

Attachments (optional)

Drag in up to **10 files at a time** (PDF, Word, Excel, CSV, PowerPoint, text). Each must be **25 MB or smaller**. These become the request's **Files** — the paperwork the approvers are being asked to sign off on.

> **i Good to know:** Files are only one of three places a document can live on an approval request, and they are the most tightly controlled of the three. See Files, Documents and the Final Document before you decide where something belongs.

Approvers

This is where you choose who decides. Add each approver from the search box — it lists both **Internal staff** and **External contacts** (you can narrow external contacts by company type or company). For an external approver you also set how many days their secure **link stays valid** (default 7, up to 30).

The **Hierarchy Feature** toggle controls the order:

Hierarchy Feature	Behaviour
On (default)	Give each approver a **Level**. COMS asks each level in turn, lowest first. **Approvers on the same level are asked at the same time** (concurrent).
Off	Approvers decide **in sequence** — just drag them into the order you want.

> **i Good to know: Approvers vs. notification recipients.** Approvers *decide*. The **Additional Notification** list (under Notifications) is a CC — those people are emailed the final outcome but don't approve anything.

When it's ready, click **Send for Approval**. The first level's approvers are emailed immediately.

> ⚠ **Heads up: Category** shows a red asterisk but the request will actually send without one.

Tracking a request

Open any request to see its status. As the requester you see everything: the details and files, the linked record, and the **Approval Chain** — every approver, their level, and whether they're Pending / Approved / Rejected, with their comments.

A request you created, mid-approval.

A request you created, mid-approval.

- The header shows the overall status and an **X / Y approvers approved** counter.
- Next to each **Pending** approver is a **Resend** button — re-send their notification (a fresh secure link for external approvers) if they've lost it.
- The **Notification List** card lets you add people to CC on the outcome — even after the request has completed.

Files, Documents and the Final Document

A request can carry documents in **three different places**, and they are not interchangeable. Each one answers a different question: *what was submitted*, *what is being referred to*, and *what was signed off*. Picking the wrong one is the most common reason people find themselves unable to upload something later.

Where it lives	What it's for	Who can add	When you can add	Versions?
Files (called *Attachments* on the form)	The paperwork the request is built on — what the approvers are actually signing off.	The requester only.	While creating, and while editing — but only until the **first approver approves or rejects**.	No
Documents tab ("Supporting Documents")	Reference material that can still change while the request is in flight — a checklist, a clarification.	The requester, the approvers, and their active delegates.	Any time — including after the request has completed.	**Yes**
Final Document	The signed-off record of the outcome. Normally the Approval Confirmation COMS generates itself.	The requester only.	Only once the request is **Completed**.	No

COMS spells the same split out on the request page itself — open the **Documents** tab and click **How Supporting Documents work**:

The Documents tab explains how it differs from Files and the Final Document.

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Files — the original submission

Files are a snapshot of what was put in front of the approvers, so COMS deliberately stops them changing underneath a decision. **As soon as any one approver approves or rejects, the Files are frozen** — you can no longer add to them, and you can no longer remove them either. That applies to everyone, administrators included.

Once a decision exists, the Files list is locked and the uploader is replaced.

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If you need to get another document in front of the approvers after that point, put it in the **Documents** tab. If the new document genuinely changes what is being approved, reset the request instead so everyone decides again on the correct paperwork.

> **i Good to know:** A request's Files all have to live in one system. If a request already has files attached through **BMS**, COMS will refuse the upload and ask you to keep adding them in BMS — a BMS file is stored there, so it can only be downloaded or removed from the BMS approval page. Files added in COMS show as download links; BMS ones are plain text with a **BMS file** tag.

Documents — living reference material

The **Documents** tab at the bottom of the request is the flexible one. It is the only place that is open to the **approvers** as well as the requester (and to an approver's active delegate), and the only place that keeps a **version history** — upload a newer version from a document's menu to supersede the current one, and the earlier ones stay available under **View All Versions**.

Adding a document is allowed at *any* point in the request's life, even after it has completed. What closes on completion is *changing* them: once the request is Completed, existing documents can no longer be edited, deleted or given a new version.

> □□ **Pro Tip:** This is the right home for anything that might be superseded — checklists, extra specifications. Because it survives the Files freeze, it is also your escape hatch when an approver asks for one more piece of evidence mid-chain.

Final Document — the signed-off record

The **Final Document** card only appears once the request is **Completed**. In almost every case it fills itself in: COMS generates the **Approval Confirmation** PDF on completion and stores it here, tagged **Permanent record** — that copy can never be replaced or deleted by anyone. See When it completes.

You only need to upload here if there is a separate officially signed document (a countersigned contract, say) that should stand as the record instead. That upload is capped at **10 MB** — lower than the 25 MB allowed for Files, so a large scan may need compressing first.

Editing, resetting and withdrawing

- **Edit** — while nothing has been decided yet, you can change anything, including the approver list. **Once any approver has approved or rejected, the request locks**: the details and decided approvers are fixed, and you can only swap out approvers who are still pending.
- **Withdraw** — cancels the request (only before it's Completed).

Resetting a locked request

Sometimes the lock is exactly the wrong outcome — the scope changed, the wrong record was linked, or the approvers were reviewing the wrong file. **Reset** is the way out: it clears the approval chain and reopens the whole request for editing, so the round can start again cleanly rather than the request being withdrawn and rebuilt from scratch.

It lives on the **Edit** page only. Open the request, choose **Edit**, and the amber locked-for-editing banner carries the **Reset request** button:

The Reset request button appears in the locked banner on the Edit page.

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Confirming spells out what you are about to lose:

The reset confirmation.

The reset confirmation.

What a reset does:

- **The whole approval chain is cleared** — every approval, every rejection, and every approver who was still waiting. The chain comes back empty, so you re-add the approvers you need.
- The **details, the approver list and the Files all become editable again**, so you can correct whatever the lock was holding.
- The cleared rows are **kept for audit** — they leave the chain, but they are not erased from the record.
- Nothing else is touched: the Documents tab, Notes, the notification list and any existing Approval Confirmation all stay as they are.

When you’re done editing, **Save Changes** sends the request out again from the lowest level of the approver list you rebuilt.

> ⚠ **Heads up: A reset notifies nobody.** Approvers whose decision was cleared are not told, and approvers who were still waiting lose their secure link without warning — nobody is asked again until you save the edited request with its new approver list. If someone had already approved, tell them why they are being asked a second time.

Who can reset:

Situation	Who can reset it
An internal-only request, part-approved or rejected	The person who **created** the request.
Any request with an **external** approver on it	An administrator only.
A request that has fully **Completed**	**Nobody.** Its Approval Confirmation is a permanent record of approvals a reset would erase, so a finished request can never be reopened — not even by an administrator.

> i **Good to know:** A reset is permanent and leaves a permanent mark. The Approval Chain carries a **Reset on … by …** note from then on, and the reset is recorded in the **Audit Trail** (in the request’s action menu) against the person who did it. There is no undo — cleared decisions cannot be put back from COMS.

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When it completes

Once every approver has approved, the request is **Completed** and COMS generates a permanent **Approval Confirmation** PDF — the official record of who approved, when, with their signatures. You (and any notification recipients) are emailed the outcome.

A completed request, with its permanent Approval Confirmation.

A completed request, with its permanent Approval Confirmation.

- The **Final Document** card holds the Approval Confirmation. You may also upload your own official signed document here if there is one — see Files, Documents and the Final Document.

- For a completed **internal-only** request you can **Download Report** (a fresh PDF). When an external approver was involved, use the permanent Approval Confirmation instead, and **Resend Confirmation** to email it again.

> ℹ **Good to know:** The on-demand **Download Report** stamps each approver's *current* signature, which could differ from the one used at decision time. The **Approval Confirmation** saved on completion is the point-in-time record — prefer it for anything official.

Approving (Internal Staff)

As an **internal approver** (Conexus staff) you review requests inside COMS and approve or reject them. This page covers your queue, the decision, and the one-time setup you need first.

> ⚠ **Heads up: Set your signature first.** Your signature is stamped next to your approval on the record, so COMS won't let you *approve* until you've added one. Go to **Settings → Signature** and draw, type, or upload it once. (You can still *reject* without one.)

Settings → Signature — add yours once, before approving.

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Your queue

When a request needs you, COMS emails you (subject *"COMS Approval Notification"*) with a **Review & Decide** button, and it appears under **Approvals → Awaiting Me** (with a badge on the sidebar). If you sit on it, a reminder email follows.

The 'Awaiting Me' queue.

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Reviewing and deciding

Open the request. You'll see an **Action Required** banner, the requester and description, the attached **files** (click to download), the **linked record** in full, and the **Approval Chain** so far.

At the bottom, the **Your Decision** box:

- Add a comment (**required if you Reject**, optional if you Approve).
- Click **Approve** or **Reject**. There's no extra confirmation step, so make sure your comment is right first.

The decision panel — comment, then Approve or Reject.

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> **ℹ Good to know:** If you haven’t set a signature, you’ll see a **“Signature required”** notice and the Approve button is disabled until you add one in Settings → Signature (Reject still works).

Approve is blocked until your signature is on file.

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How multiple approvers work

- **Everyone must approve** for the request to complete.
- **Any single rejection ends it** — later approvers are no longer asked, and the requester is emailed the reason.
- Approvals are requested **one level at a time** (lowest first); people on the same level are asked together. So you’ll typically only be asked once it’s your turn.

> **Pro Tip:** You’re only ever asked to approve your own level. If you don’t see a request you expected, it may still be waiting on an earlier level.

External Approvers

External approvers are customer contacts who approve on the COMS **customer portal**, reached through a secure one-time link — no COMS account or password needed. This page is what to tell them (or to follow if you are one).

Getting the invitation

When it's the external approver's turn, COMS emails them (subject *"COMS Approval Notification"*) with a **secure link**. Clicking it signs them straight into the customer portal — no username or password.

About the link	
Valid for	The number of days the requester set (7 by default, up to 30).
One-time	Each link works once. Revisiting after signing in just returns them to their approvals.
If it expired	They're shown a "link unavailable" page and should ask the requester to resend it.

The customer portal

The link lands them on **External Portal → Approvals**, filtered to what's waiting on them. It has **Awaiting Me**, **I've Acted On** and **All** tabs and shows their company name.

The customer portal approvals list.

The customer portal approvals list.

Reviewing and deciding

Opening a request shows an **Action Required** banner, the request details and downloadable files, the linked record (customers see the record details but **no links into internal COMS pages**), and the full approval chain including earlier decisions.

The external approval page — details, chain, and the decision panel.

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- Add a comment (**required to Reject**, optional to Approve) and click **Approve** or **Reject**.
- As with internal approvers, a **signature is required to approve** — there's a prompt with an *"Upload your signature"* link to set one; rejecting doesn't need one.

After deciding, the page confirms it inline ("*You approved this on…*") and the requester is emailed. When the external approver is the last to approve, the request completes and the Approval Confirmation PDF is emailed to them as well.

After deciding — the decision is recorded against the customer's account.

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> ℹ **Good to know:** Every decision is tied to the account the secure link signed in, so the record always shows exactly who approved on behalf of the customer — the link can't be used to act as anyone else.

> 💡 **Pro Tip:** If an external approver says their link expired or never arrived, the requester can open the request and click **Resend** next to their name to send a fresh one (see Tracking a request).