

## QUICK REFERENCE GUIDE

### *Approving SWIFT Documents*

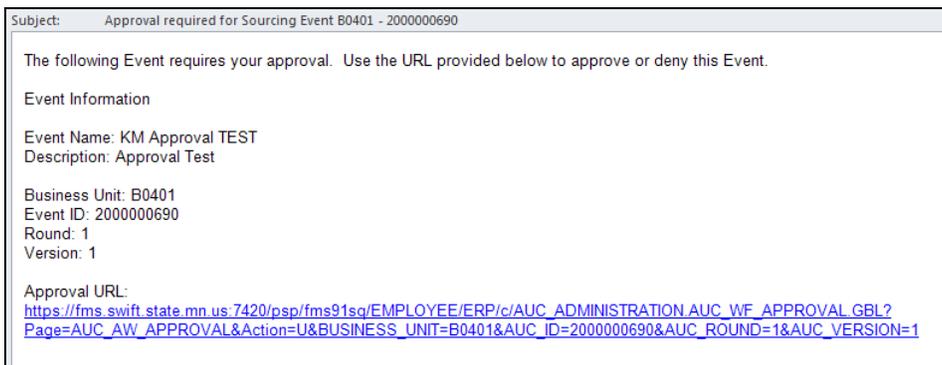
November 7, 2012

#### Approval Process

When a document is created and enters the workflow, it must be approved by one or more approvers. The approval process works the same regardless of the type of approver or the type of document.

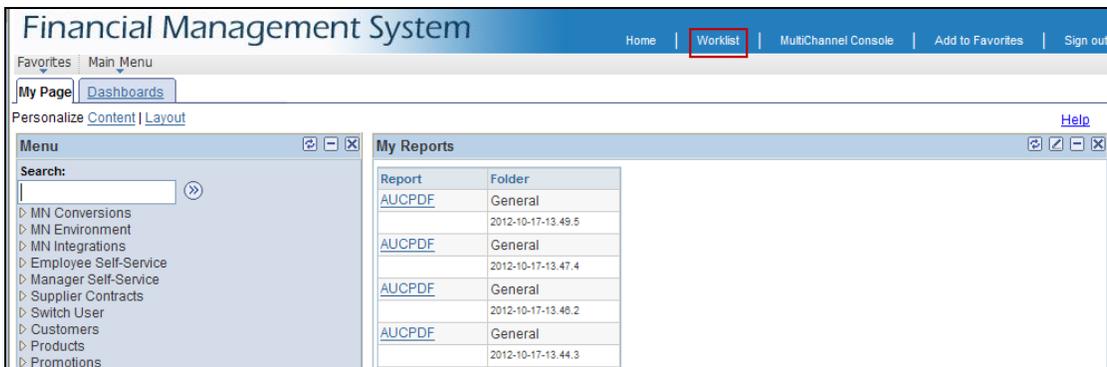
Once a document is ready for approval, a notification will be sent to the approver via the SWIFT Worklist email notification. The notification email will include basic information about the document needing approval as well as a link to approve it at the bottom.

1. Click the **approval** link at to navigate to the SWIFT worklist



If you are not already, you will be asked to log into SWIFT and will be directed to the worklist.

The email notification is not required to access the SWIFT Worklist; you can also navigate directly there when in SWIFT by clicking the **Worklist** link.



2. Locate the specific document you wish to review for approval
  - a. From: Document creator or previous approver
  - b. Date From: Date approval was initiated

- c. Work Item: What needs to be accomplished by the work list user
  - d. Worked by Activity: What action is being taken
  - e. Priority: Importance assigned by the Work list user
  - f. Link: Click to access the approval page for the document
3. Click the **Link** to navigate to the document approval page

Worklist for PT\_COORD\_APPR: Johnny PT Coordinator Approver

Detail View Work List Filters: [dropdown] Feed [dropdown]

From	Date From	Work Item	Worked By Activity	Priority	Link		
Melcher,Kelly T	11/02/2012	Approval Routing	Approval Workflow	2-Medium [dropdown]	<a href="#">Event Approval. 801_Event Approval. 2012-09-25_N_0_Event ID 2000000690 is awaiting approval.</a>	Mark Worked	Reassign

Once on the document approval page, you will see an overview of the document needing approval as well as a link to see additional details about the document.

**Approve a Document**

1. Review the document as appropriate by clicking the document ID number
2. Enter any comments in the **Approval Comments** box
3. Click **Approve**

Financial Management System

Home | Print | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

New Window | Help | Customize Page | http

**Event Approval**

Business Unit: B0401 Event ID: **2000000690** Round: 1 Version: 1 Event Fo

Event Name: KM Approval TEST Event Status: Pending Post Approval

Description: Approval Test

Event Type: RFX Start Date: 11/06/2012 9:23AM CST

Entered By: Melcher,Kelly T End Date: 11/07/2012 9:23AM CST

Review/Edit Approvers

**Event Approval**

Approval Status: Pending

Buy or RFI for Professional

Pending Multiple Approvers Event Approval with role

Not Routed Multiple Approvers Event Approval with role

Not Routed Multiple Approvers Event Approval with role

Not Routed Melcher,Kelly T Auc Roleuser by Buyer ID

Not Routed

Approval Comments

Approve Deny

A confirmation message will appear to verify the approval.

4. Click **OK**

**Event Approval**

Approval Confirmation

✓ Are you sure you want to approve this event?

OK Cancel

Once approved, the document will be routed to the next approver, or continue in its lifecycle.

**Event Approval**

Business Unit: B0401    Event ID: 2000000690    Round: 1    Version: 1    Event F

Event Name: KM Approval TEST    Event Status: Pending Post Approval

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Event Type: RFX    Start Date: 11/06/2012 9:23AM CST

Entered By: Melcher,Kelly T    End Date: 11/07/2012 9:23AM CST

Review/Edit Approvers

**Event Approval**

Approval Status: Pending

Buy or RFI for Professional

Approved ✓ Johnny PT Coordinator Approver  
Event Approval with role  
11/02/12 - 9:37 AM

Pending Multiple Approvers  
Event Approval with role

Not Routed Multiple Approvers  
Event Approval with role

Not Routed Melcher,Kelly T  
Auc Roleuser by Buyer ID

## Deny a Document

If there is a problem and the document should not move forward, it can be denied. The document creator will automatically be notified by SWIFT via an email. The document creator can fix the problem and resubmit it for approval, or cancel the document.

1. Review the document as appropriate by clicking the document ID number

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Event Name: KM Approval TEST    Event Status: Pending Post Approval

Description: Approval Test

Event Type: RFX    Start Date: 11/06/2012 9:23AM CST

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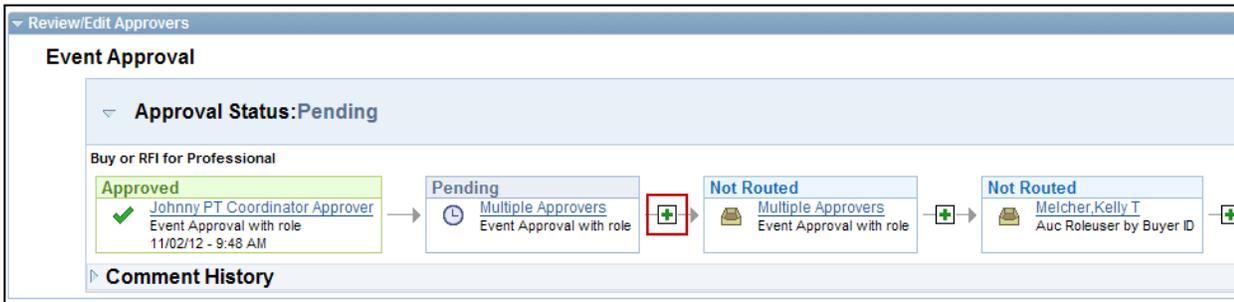
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Approval Comments

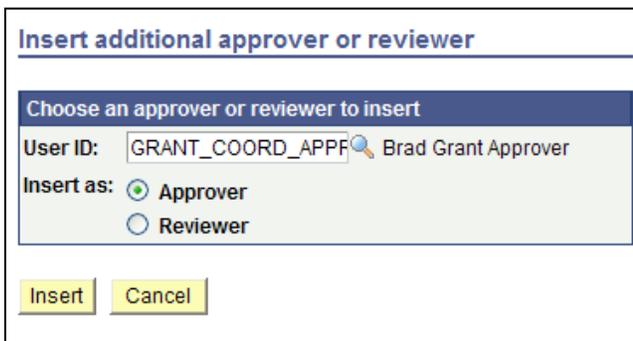
Approve Deny

2. Enter any comments in the **Approval Comments** box
3. Click **Deny**



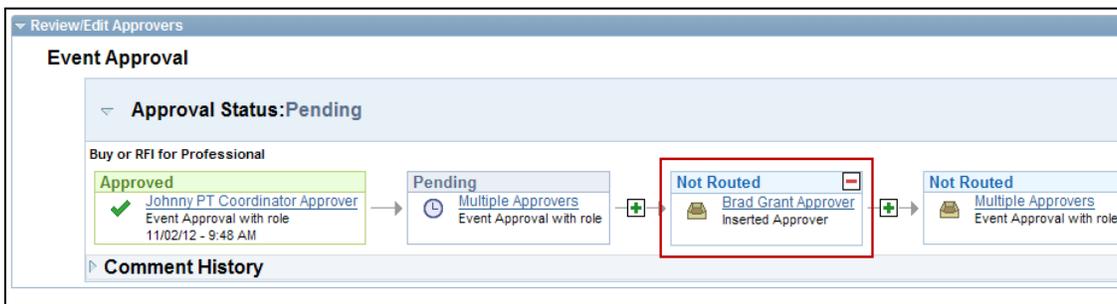


2. Locate the approver to be inserted
3. Select if they should be an approver, or a reviewer
4. Click **Insert**



Once the current approver has approved the document, it will be routed to the next approver in the approval chain.

If the additional approver was added in error, it can be removed by clicking the Remove icon. 



## Start a New Approval Path

Any approvers in the original approval chain will be routed the document to approve in sequence. If an additional approver should review outside the sequence of the current approvers, an additional approval path can be added. Additional paths will process in parallel of the first path so as not to disrupt the original sequence. The document will only continue moving forward after both paths are approved.

If an additional approval path needs to be added, it can be done by an existing approver during their review.

1. Click the **Start New Path** icon

2. Locate the approver to be inserted
3. Select if they should be an approver, or a reviewer
4. Click **Insert**

The name of the approver who added the new path will be shown above the path.

Once the current approver has approved the document, it will be routed to the next approver in the approval chain as well as the first approver in the new path(s).

If the additional approver was added in error, it can be removed by clicking the Remove icon