QUICK REFERENCE GUIDE

Contract Document Approval Workflow

March 21, 2013

Introduction

All contract documents must be approved before they can be signed. SWIFT uses predefined approval workflow to route the document for approvals. Approval workflow operates in a serial manner, that is, the first approver must approve the document before SWIFT routes it to the second approver, and so on.

This Quick Reference Guide presents the information necessary for those asked to approve contract documents to be able to complete this task.

Approval Workflow Steps

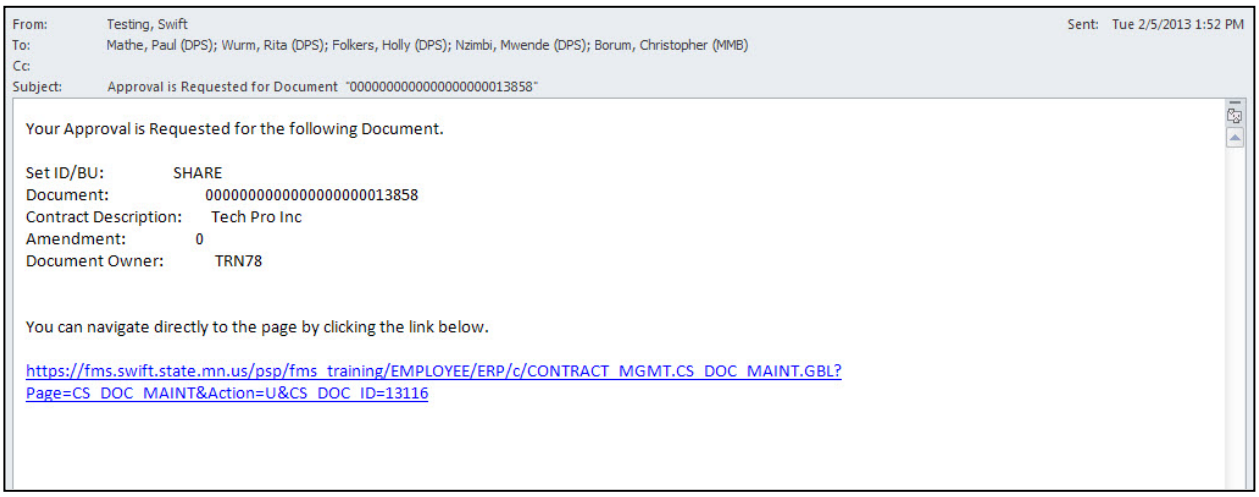
- Contract Administrator submits the contract document for approval
- First approver receives notification via email and worklist
- First approver approves the contract document*
- SWIFT routes to the next approver
- When the document is fully approved, SWIFT notifies the Contract Administrator

*If any approver denies the contract document, SWIFT notifies the Contract Administrator and cancels the remaining approval routing.

Approver Receives Notification via Email or Worklist

Approvers receive an email notification that a contract document is awaiting their approval. The email includes basic information about the contract document as well as a link to the SWIFT Portal.

Click the link in the email to display the login page for SWIFT or log in to SWIFT via a browser. Note that if you use the link in the email notification, you do not have to search for the document; the document management page displays automatically after you log in.


From: Testing, Swift
Sent: Tue 2/5/2013 1:52 PM
To: Mathe, Paul (DPS); Wurm, Rita (DPS); Folkers, Holly (DPS); Nzimbi, Mwende (DPS); Borum, Christopher (MMB)
Cc:
Subject: Approval is Requested for Document "00000000000000000000013858"

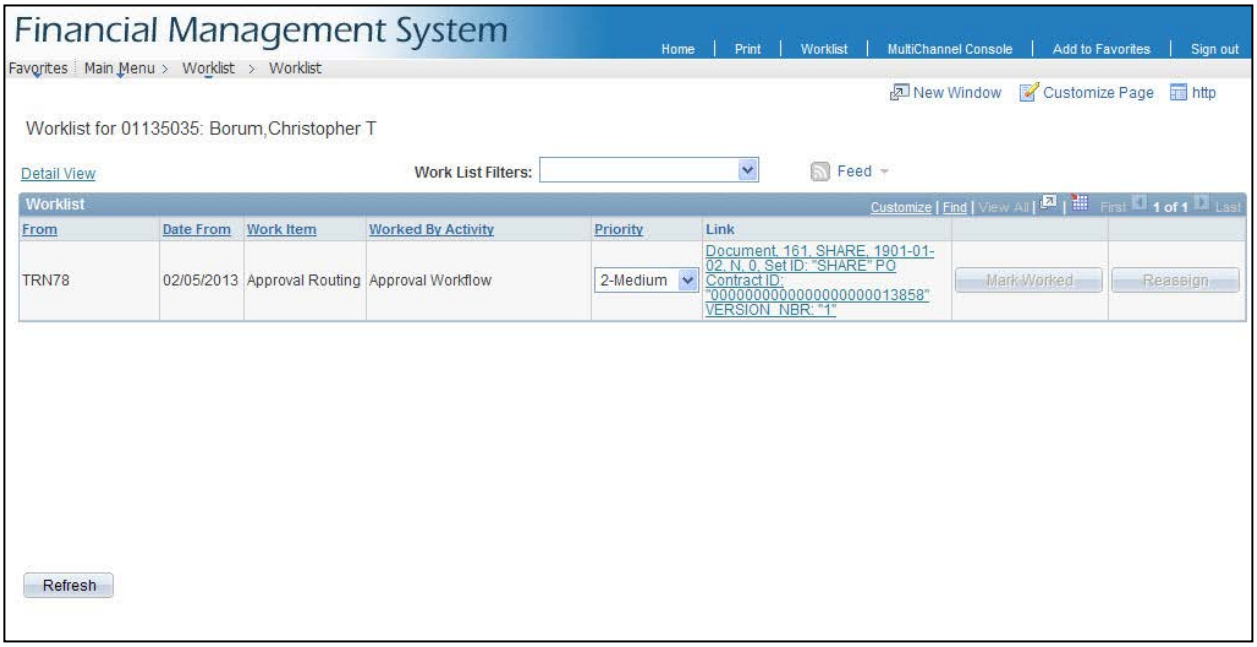
Your Approval is Requested for the following Document.

Set ID/BU: SHARE
Document: 00000000000000000000013858
Contract Description: Tech Pro Inc
Amendment: 0
Document Owner: TRN78

You can navigate directly to the page by clicking the link below.

https://fms.swift.state.mn.us/psp/fms_training/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Page=CS_DOC_MAINT&Action=U&CS_DOC_ID=13116

Approvers can also access the document management page using the link in their worklist.



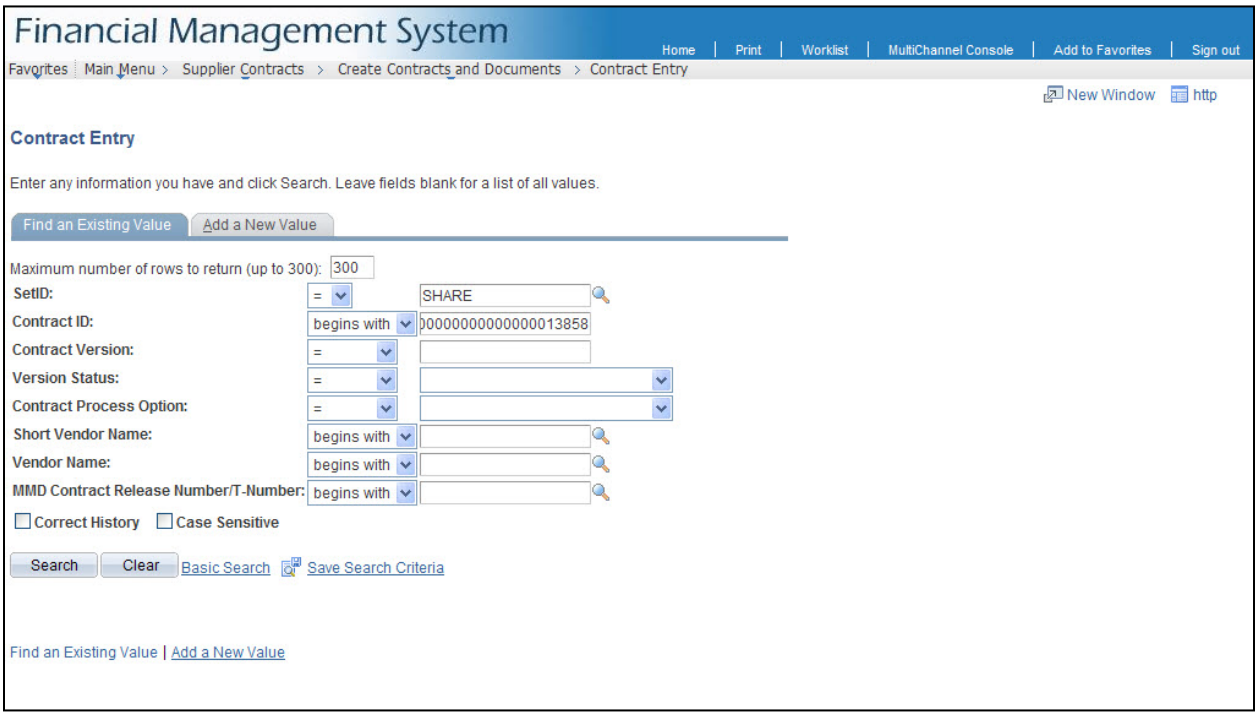
Review Contract Details

Before approving the contract document, you should review other documents associated with the contract, such as the purchase order or sourcing event. These can be accessed from the Contract Entry page. You can search for the contract and then navigate to the page directly from the search results, or link from the Document Management page. The first part of this Guide section shows how to search for the contract. The second part of this section shows how to get to the Contract Entry page from the Document Management page.

Search for the Contract

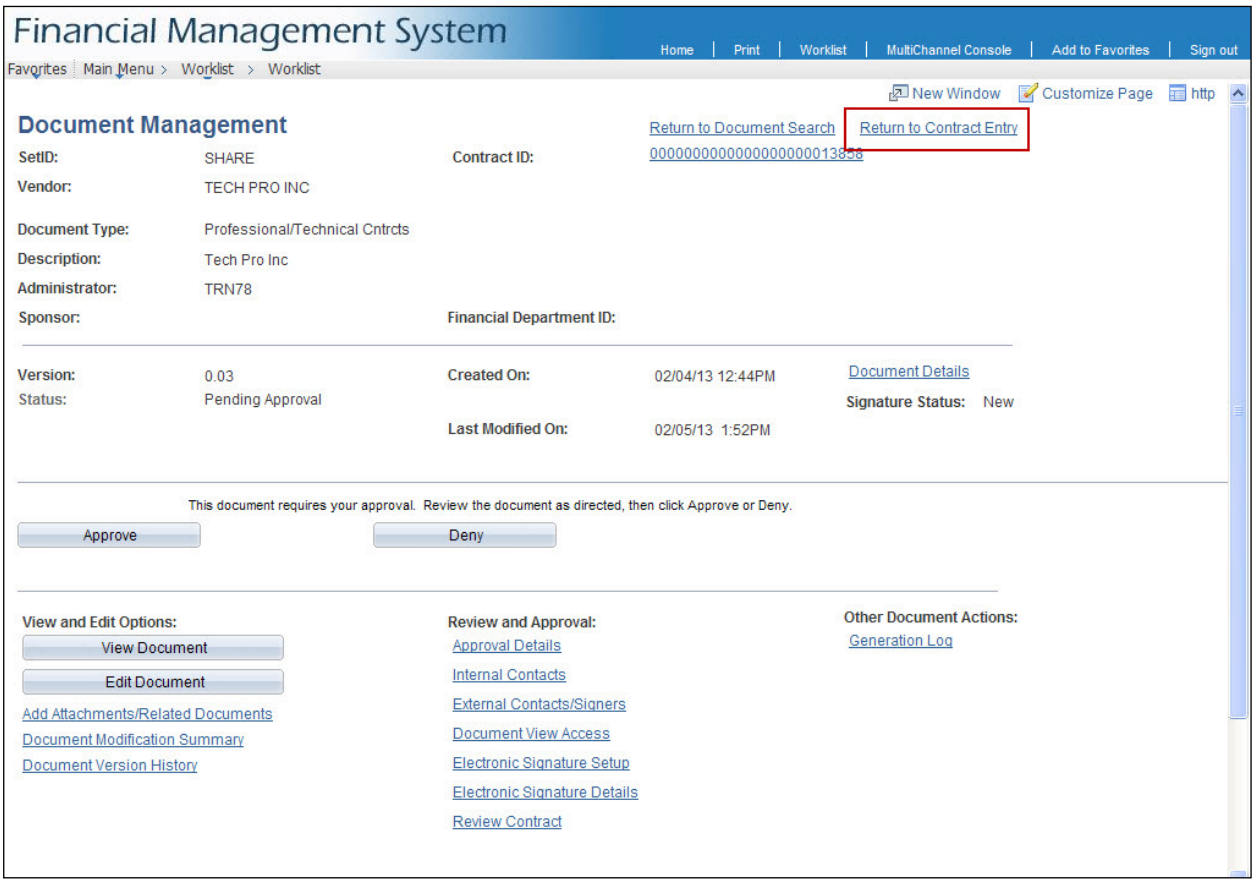
Navigation: Supplier Contracts, Create Contracts and Documents, Contract Entry

Search by the Contract ID, or other variable, to locate the contract. If you enter the complete Contract ID, SWIFT automatically opens the Contract Entry page. Otherwise, click the link in the search results.

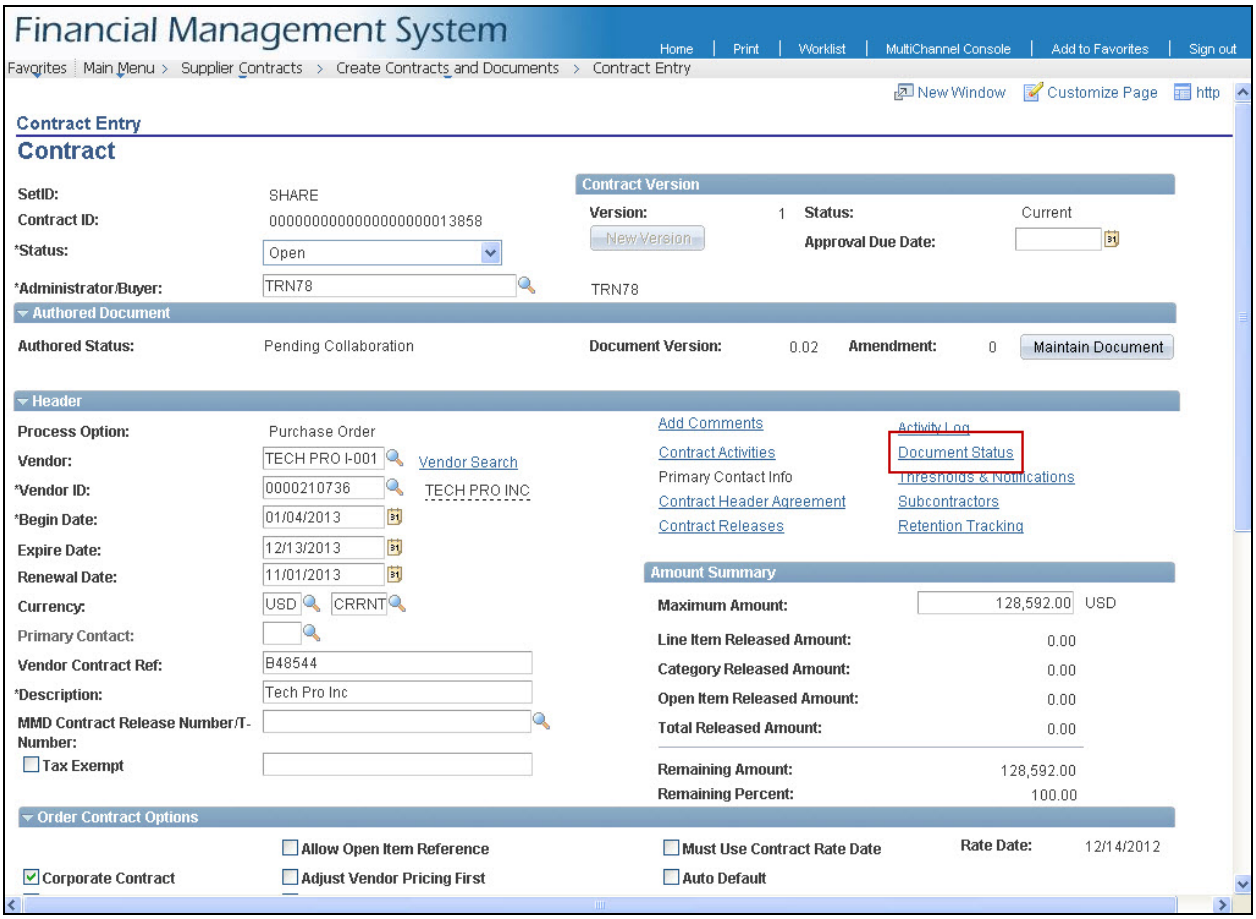


Link from Document Management

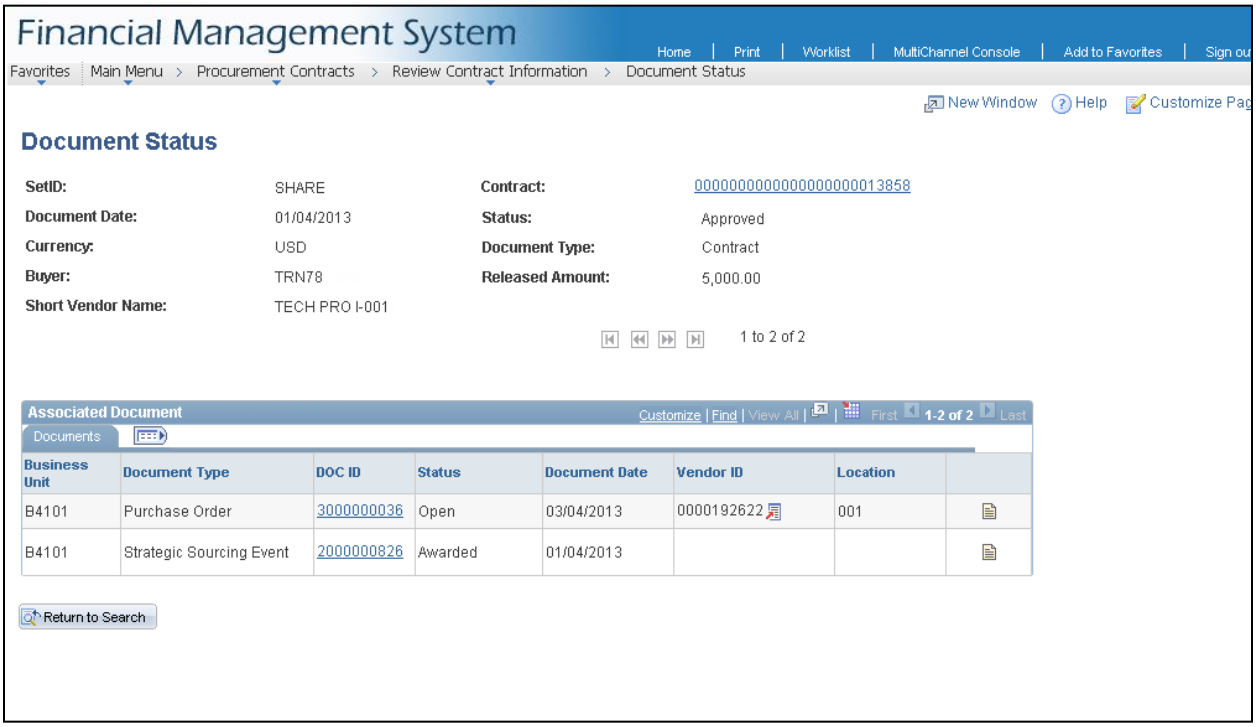
From the *Document Management* page, click the *Return to Contract Entry* page at the upper right.



On the *Contract Entry* page, click the *Document Status* link to access links to all related SWIFT transaction processes including Requisitions, Strategic Sourcing Events, Purchase Orders, and other transactions.

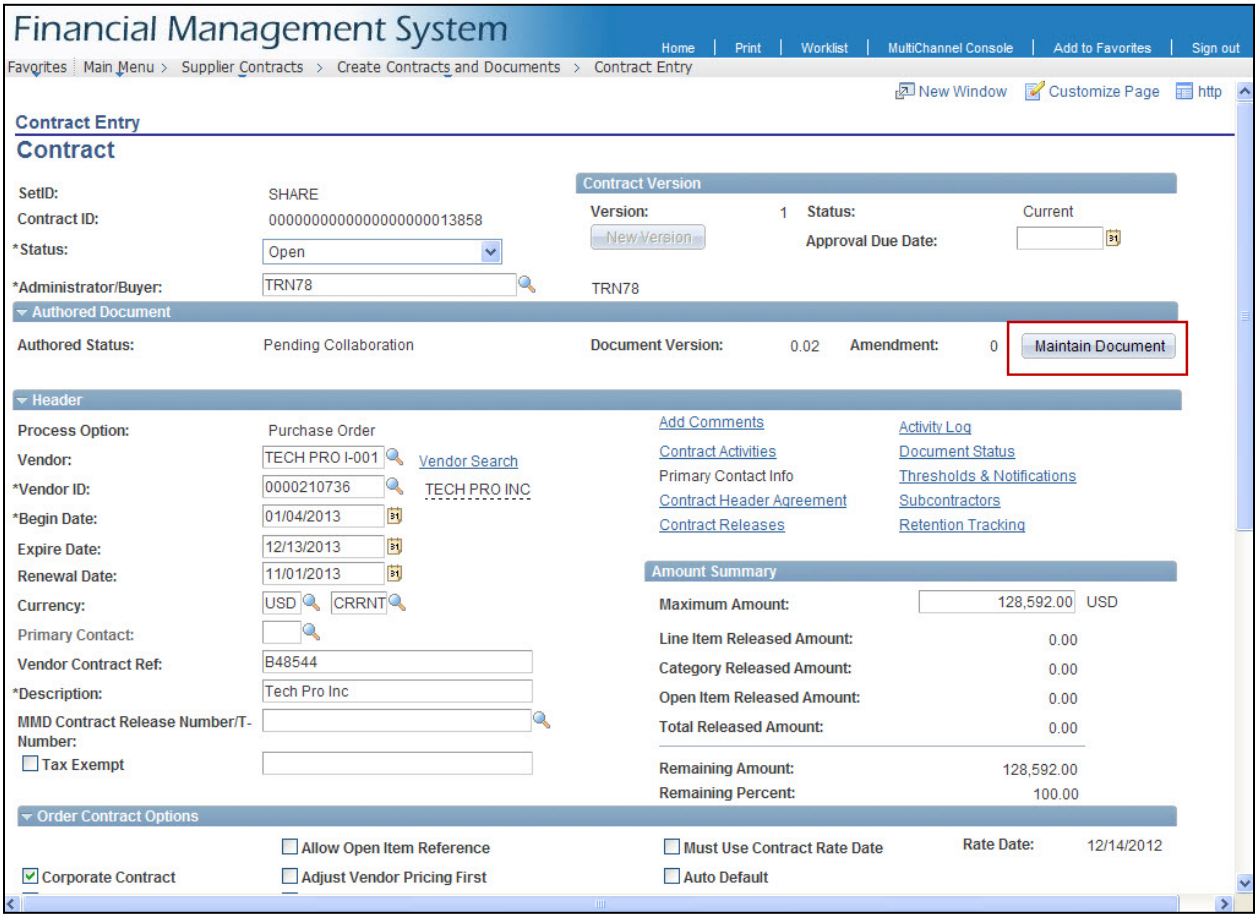


The Document Status page shows any related transactions for the contract. Click the hyperlinked DOC ID to open that document for review. When you are finished with your review, click the hyperlinked Contract Number to return to the Contract Entry page.



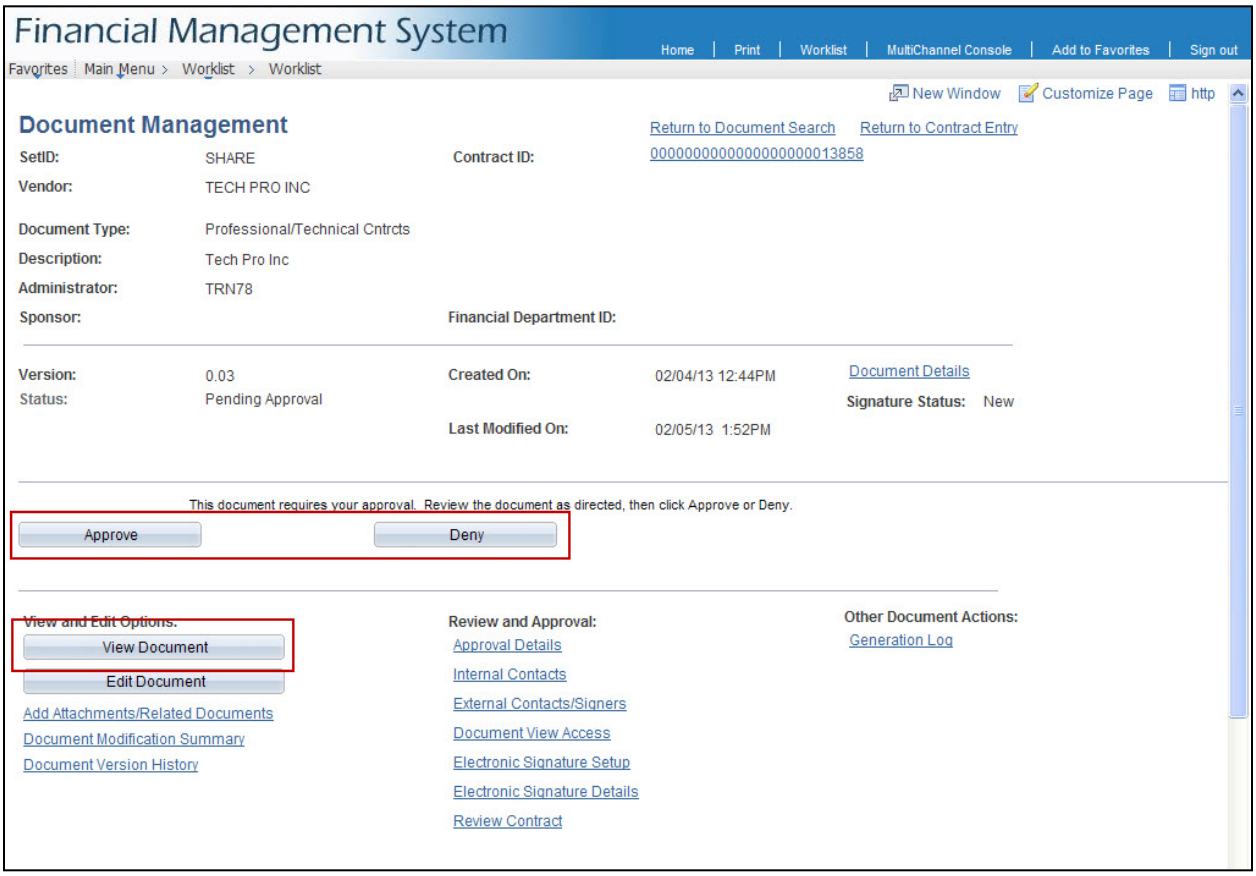
Approve or Deny the Document

After reviewing the related documents, return to the *Document Management* page to approve or deny the document. From the *Contract Entry* page, click **Maintain Document**.



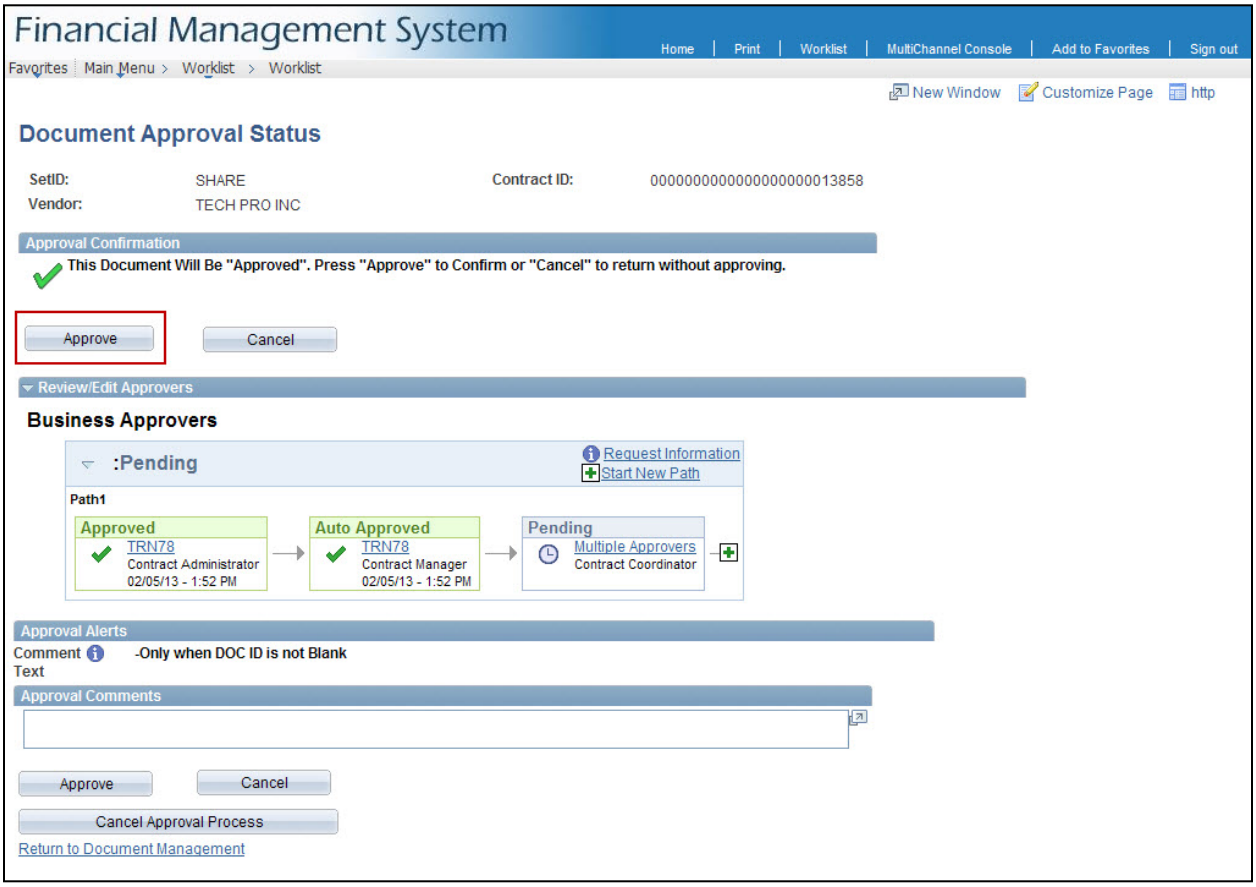
First review the document to determine whether you wish to approve it or deny it. Click the View Document button to open the document in Microsoft Word. If you encounter any problems opening the document, refer to the Quick Reference Guide Setting Default to Word on XML Files.

Click **Approve** or **Deny** as necessary.



If you click **Deny**, SWIFT cancels any remaining approval routing and notifies the Contract Administrator that you have denied the document.

If you click **Approve**, SWIFT opens the *Document Approval Status* page. You must click **Approve** once more to complete the approval process. In this example, you are approving the document in the capacity of the Contract Coordinator. The Contract Administrator and the Contract Manager have already approved the document. You can add optional comments in the *Approval Comments* text area at the bottom of the page.

You do have the option to cancel your approval and return to the *Document Management* page.

When you approve the document, SWIFT checks to determine if any additional approvals are required and routes the document as needed. If yours is the last approval needed, SWIFT notifies the Contract Administrator and completes the approval workflow.