Approve a Contract Document Electronically

Before you submit a contract document for signatures, you must route it for approvals. You can route the contract documents you created in SWIFT for electronic approvals. SWIFT uses a predefined workflow to route contract documents for approval. SWIFT routes them sequentially. The first approver must approve it before SWIFT routes it to the next approver. Agencies can enable internal users to sign documents digitally at the same time they approve the document. Agencies can configure SWIFT to capture internal signatures before, during or after approvals.

Approvers can approve or deny the contract document. If an approver denies the contract document, SWIFT notifies the contract coordinator and cancels the approval routing.

**Approvers:**
Agency leadership works with its SWIFT security coordinator to set up the approval paths for approvers. The security coordinator sets up approvers and approval roles for contracts based on agency policy and practice. Typically, agency staff are set up for these approvers.

- **Contract Administrator:** Staff person identified on the Contract Entry page. It may or may not be the person sending the contract document for approval. If it is the same person, workflow is set to self-approve and the Approve or Deny buttons are immediately available on the Document Management page. If it is not the same person, SWIFT will notify the contract administrator via email and/or Worklist.
- **Contract Manager:** Staff person identified on the Create Document page. It is a required field. This could also be the same person as the contract administrator.
- **Additional Approver:** Staff person also identified on the Create Document page. This field is optional. If you did not identify an additional approver, SWIFT skips this approval step.
- **Contract Coordinator:** Staff person responsible for reviewing Professional/Technical contract documents before you send them for signature. There might be more than one contract coordinator at an agency. If so, all users with the role will receive notification and a link in their worklist.

**Roles for Approvers:**
Your agency leadership needs to contact your security coordinator to add this role for contract coordinator and approvers.

- **Document Approver:** M_FS_SC_CONTRACTUAL_APPRVER

This guide assists contract document approvers to be able to complete their tasks.

**Steps to complete**
- Step 1: Use the Approvals tile to find contract documents for review and approval
- Step 2: Review and approve or deny the contract document
Steps to Approve a Contract Document through SWIFT

Step 1: Use the Approvals tile to find contract documents for review and approval

All SWIFT approvers can access documents such as purchase orders to approve on their Approvals tile. It is located on their My Homepage.

1. On the My Homepage, select the Approvals tile. You can see how many items are ready for review and approval. In the example below, there are eight items for review and approval.

   ![Image of My Homepage with Approvals tile highlighted]

2. SWIFT displays the Pending Approvals page. The approver can select the title (e.g., Supplier Contract) to access individual contract documents and other documents for their review and approval. For example, some approvers may be responsible for reviewing and approving events.

   ![Image of Pending Approvals page with Supplier Contract highlighted]

SWIFT will display the approval page for that individual contract document.

Step 2: Review and Approve or Deny the Contract Document.

SWIFT displays the Pending Approvals page for the contract document to review.

![Image of Approval page for Supplier Contract]
1. Review the instructions from the contract administrator. Select the Approval Chain button at the bottom of the page. You can see any instructions in the Comments section.
   - As an option, you can select the View History link (in the Comment History section) to see past comments.
   - Press the Close icon (e.g., red X) at the top of the page to return to the Pending Approvals page.

2. Review the contract document.
   Press the Review Document link at the top of the page. SWIFT will display a message to open up the contract document on your desktop. Select Open.
   a. Approve: When you are ready to approve the contract document, select the Approve button at the top of the page.

   - SWIFT displays the Approve window. Add any comments and then press the Submit button.

   - After you approve the contract document, SWIFT returns you the Pending Approvals page. You can review other documents or leave this page.
• SWIFT will route the contract document to the next approver on the route, if there is one. When the last approver approves it, the contract document status will be “Approved”.

• The contract administrator can process this document to get it fully signed and executed.

You have successfully approved a contract document.

b. Deny: When you are ready to deny the contract document, select the Deny button at the top of the page.

• SWIFT displays the Deny window. As a best practice, add comments explaining why you denied the contract document. Then press the Submit button.

• After you denied the contract document, SWIFT returns you the Pending Approvals page. You can review other documents or leave this page.

• SWIFT will update the Document Management page for that contract document. It will show that one of the approvers denied the contract document. The contract administrator will select the Approval Details link to see your comments.

• The contract administrator will review the contract document and your comments to remedy the issue. They will fix the contract document and reroute it. Or, they will cancel the contract document.

You have successfully denied a contract document.