

Quick Reference Card – SRM Workflow – Forward



Process: Perform this procedure when an item received in the "INBOX" needs to be sent to someone else for review or authorization. Once this item has been sent via "FORWARD" it will no longer be available to the person who sent the item. If item is to be returned, the person who received the document must also "FORWARD" back through the same process.

Role: Any user with Workflow access

Frequency: Any time

BEGINNING STEPS

INBOX

Highlight item

Select "FORWARD"

Subject	From	Sent	Priority
Approve Shopping Cart 9000001122 with Value 5,000.00 USD	Hines, Joe P	Aug 22, 2011	Normal
Revise Shopping Cart 9000000127 with Value 20,000.00 USD	Nicholas, Leah	Jun 7, 2011	Normal
Revise Shopping Cart 9000000121 with Value 11,500.00 USD	Nicholas, Leah	Jun 7, 2011	Normal
Approve Shopping Cart 9000000170 with Value 958.32 USD	Iype, Sony	May 31, 2011	Normal
Approve Shopping Cart 9000000128 with Value 1,500.00 USD	Nicholas, Leah	May 27, 2011	Normal
Approve Shopping Cart 9000000123 with Value 500.00 USD	Nicholas, Leah	May 27, 2011	Normal
Approve Shopping Cart 9000000122 with Value 15,500.00 USD	Nicholas, Leah	May 27, 2011	Normal
Approve Shopping Cart 9000000120 with Value 10,000.00 USD	Nicholas, Leah	May 27, 2011	Normal
Approve Shopping Cart 9000000119 with Value 10,000.00 USD	Hines, Joe P	May 26, 2011	Normal
Approve Shopping Cart 9000000118 with Value 15,000.00 USD	Hines, Joe P	May 26, 2011	Normal

Approve Shopping Cart 9000001122 with Value 5,000.00 USD
Sent: Aug 22, 2011 by Hines, Joe P
Priority: Normal
Status: New
You are responsible for the approval of shopping cart "T-SRMSHO 08/22/2011 08:48 " T-SRMSHO.
The total value is 5,000.00 USD.
You can use decision buttons to approve or reject the shopping cart.
Buttons: Approve, Reject, Details, Print Preview, Resubmit, **Forward**, Assign To Me

Universal Worklist will display

Choose "SELECT"

Universal Worklist: Forward Items Approve Shopping Cart 9000001122 with Value 5,000.00 USD
You can forward the item to one or more users. Select the new assignee(s) from the list of possible recipients. Then choose "Submit."
Buttons: Submit, **Select...**

TYPE

Name of Person

Note: single name will bring in any user with that specific first, middle or last name

Search For People
Search For Names: Leah Nicholas **Search**

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Confirm desired selection is the correct person by clicking on the name to display General Data

Search For People

Search For Names:

Current Selection

☒	Nicholas, Laura M
☐	Jumblatt, Nicholas L
☒	Nicholas, Leah
☐	Nihoris, Nicholas
☐	Paz, Nicholas B
☐	Morris, Nicholas H
☐	Horvath, Nicholas D
☐	Wright, Nicholas A
☐	Smith, Nicholas S
☐	Clayton, Nicholas E

Row 1 of 832

General Data

Name
Last Name: Nicholas
First Name: Leah
User ID: ldnich2

Communication
Telephone: 859 323-8689
Mobile Phone Number: 129578923921357376
Fax: 859 323-6165
E-Mail Address: Leah.Nicholas@uky.edu

Next, click the box icon  to left of desired name

Choose "Apply"

Search For People

Search For Names:

Current Selection

☒	Nicholas, Laura M
☐	Jumblatt, Nicholas L
☒	Nicholas, Leah
☐	Nihoris, Nicholas
☐	Paz, Nicholas B
☐	Morris, Nicholas H
☐	Horvath, Nicholas D
☐	Wright, Nicholas A
☐	Smith, Nicholas S
☐	Clayton, Nicholas E

Row 1 of 832

Name populates in field

Choose "SUBMIT"

Universal Worklist: Forward Items Approve Shopping Cart 9000001122 with Value 5,000.00 USD
You can forward the item to one or more users. Select the new assignee(s) from the list of possible recipients. Then choose "Submit."

Item will no longer be in your inbox

 Item was forwarded successfully

Quick Reference Card – SRM Workflow – Forward



INBOX Review

Item is no longer available for review by you and is displaying in the inbox of the user for whom it was submitted.

Tasks (15 / 16) Alerts Notifications Tracking

Show:

New and In Progress Tasks (15 / 16)

Select a Subview...

All

Create Task

☐ High Priority Due Date:

Select One...

 Sent Date:

Select One...

 Text:

Apply

Reset

Tasks 90000001122 is no longer in this inbox

Subject	From	Sent	Priority	
Revise Shopping Cart 9000000127 with Value 20,000.00 USD ₪	Nicholas, Leah	Jun 7, 2011	Normal	
Revise Shopping Cart 9000000121 with Value 11,500.00 USD ₪	Nicholas, Leah	Jun 7, 2011	Normal	
Approve Shopping Cart 9000000170 with Value 958.32 USD ₪	lype, Sony	May 31, 2011	Normal	
Approve Shopping Cart 9000000128 with Value 1,500.00 USD ₪	Nicholas, Leah	May 27, 2011	Normal	
Approve Shopping Cart 9000000123 with Value 500.00 USD ₪	Nicholas, Leah	May 27, 2011	Normal	
Approve Shopping Cart 9000000122 with Value 15,500.00 USD ₪	Nicholas, Leah	May 27, 2011	Normal	
Approve Shopping Cart 9000000120 with Value 10,000.00 USD ₪	Nicholas, Leah	May 27, 2011	Normal	
Approve Shopping Cart 9000000119 with Value 10,000.00 USD ₪	Hines, Joe P	May 26, 2011	Normal	
Approve Shopping Cart 9000000118 with Value 15,000.00 USD ₪	Hines, Joe P	May 26, 2011	Normal	
Approve Shopping Cart 9000000117 with Value 25,050.00 USD ₪	Hines, Joe P	May 26, 2011	Normal	

Row 1 of 16

INBOX OF Recipient

Document displays

Welcome Joseph Hines					
An error occurred while trying to connect to the provider Click for details					
Tasks (1 / 1) Alerts Notifications Tracking					
Show: New and In Progress Tasks (1 / 1) Select a Subview... All					
Subject	From	Sent			
Approve Shopping Cart 90000001122 with Value 5,000.00 USD ₪	Hines, Joe P	Aug 22, 2011			