

Finance - Approval Workflow

A workflow is used to track and control documents through document inception to finalization.

2 Steps for Documentation Approval (*simplified model*)

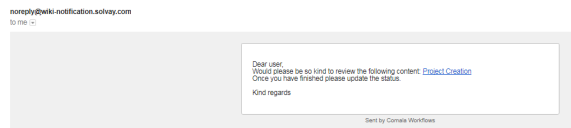
1. **Draft** - The operation / page is being created or updated and thus, not yet submitted for approval. Restricted accesses.
2. **Published** - The operation / page has been approved by the concerned people (based on workflow model) and it is available to all Confluence Finance end-users.



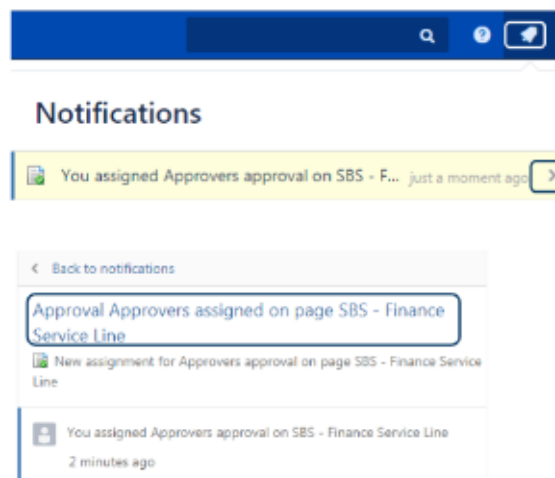
How do we use the approval workflow

Whenever an approver is assigned, he /she:

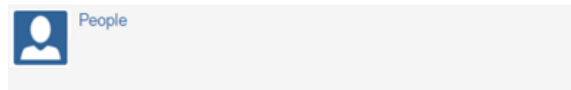
1. receives a notification by email



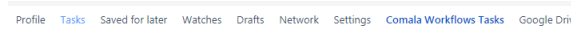
2. has a notification in his/her box in Confluence



3. has a report of all pages he/she has to approve in "My Comala Workflows Tasks" (to be opened by clicking on his picture on right side of the menu)



4. has a report of all pages he/she has to approve in "My Comala Workflows Tasks" on his/her home page (=Confluence dashboard)



5. can use the general [workflow report](#) or the report by Unit available in each Unit Home page

Title	Updated by	Updated	State	Changed	Changed by	Expiration Date
Structural Data Management KPI's	Catarina Amaro	yesterday	DRAFT	on Jan 10, 2018	Cátia Pinto	
RTR Data Management Workflow Training	Catarina Amaro	yesterday	DRAFT	on Nov 10, 2017	Filipa Francisco	
RTR Data Management Roles Assignment	Catarina Amaro	yesterday	DRAFT	on Nov 10, 2017	Filipa Francisco	

FAQ

The status of the page can be changed by someone belonging to the group:

If someone is missing or should be excluded (if you know the person left the company or has a new job), you can contact [SBS support](#)

Are you sure you are looking the "in progress" version ? You can switch from the version "in progress" to the version "published" (that doesn't take into account your last modification) by clicking on "published"

