

Customer Credit and Trade Service Line documentation management



Who ?

All OtC Collaborators belong to the Confluence Group / Specialist on each OtC domains (ex. Credit manager, Customer Service Representative,)

Users listed on standard accounts do not have the privilege to view user profiles.

How ?

1. Create an Operating Procedure
2. Once the procedure is finalized, the contributor changes the status from **DR AFT** to **FOR REVIEW** by clicking on

the icon

3.The author can assign this step to someone who is in the **sbscct-reviewers**, click on **Assign**

- Enter the name of the reviewer (if you can not find the name, it is not included in the sbsotc-reviewers group)
- Enter a comment
- Click "Assign"



Who ?

Team Leaders or Process Experts / Managers belong to the Confluence Group

Users listed on standard accounts do not have the privilege to view user profiles.

How ?

- 1.Receive notification
2. **Verify, Review the procedure**

3.Validate the procedure and then modify the status from **FOR REVIEW** to **TO BE APPROVED** by clicking on the

icon and "Assign" someone who is in the **sbscct-approvers**

3.bis Do not validate _ inform the contributor to review the procedure



Who ?

Process Experts or Process Managers belong to the Confluence Group

Users listed on standard accounts do not have the privilege to view user profiles.

How ?

- 1.Receive notification
2. **Verify, Review the procedure** to harmonize, simplify, improve or extend perimeter covered (WW)

3.Validate the procedure and then modify the status from **TO BE APPROVED** to **PUBLISHED** by

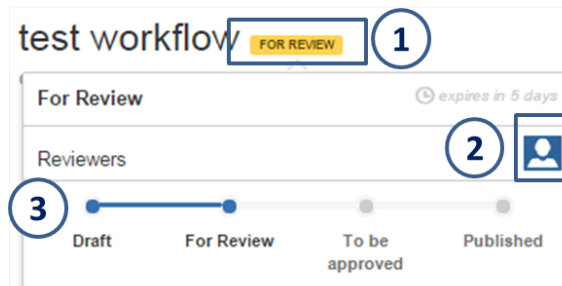
clicking on the icon

3.bis Do not validate _ inform the reviewer to review the procedure


Keep track of the approved version





You can check the status of page:

1. The status beside the title of the page
2. You can see if someone is already in charge of the change of the status
3. You can see where you are in the workflow




You can see the history of th workflow


by clicking 


 Edit  Watch  Share  ...

Activity

Jun 22, 2016

 Charlotte Rollier
changed state to **PUBLISHED** at 7:10 PM v3

 Charlotte Rollier
gave *Approvers* approval at 7:10 PM
changed expiry date to Jun 27, 2016 at 7:08 PM
changed state to **TO BE APPROVED** at 7:08 PM v3

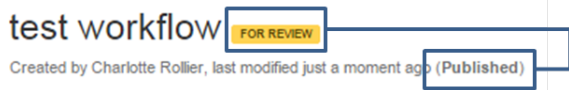
 Charlotte Rollier
gave *Reviewers* approval at 7:08 PM
assigned approval *Reviewers* to Charlotte Rollier at 7:07 PM
unassigned Charlotte Rollier from approval *Reviewers* at 7:07 PM

When a page is modified it comes back to the status **FOR REVIEW**

And it has to be reapproved.

The page that is visible by every body is the one that is **PUBLISHED**

But contributors can see that there is a version "in progress" and can switch from the version "in progress" to **PUBLISHED**



If you have any doubt you can contact The content of this macro can only be viewed by users who have logged in.