**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”

**Universal Worklist** will display  
Choose “SELECT”

**TYPE**  
Name of Person  

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

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**Search For People**

Search For Names: [Leah Nicholas]  
[Search]

---

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myHelp Website:  
[http://myhelp.uky.edu/rwd/HTML/index.html]
**Quick Reference Card – SRM**

**Workflow – Forward**

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

   ![Search For People](image1)

   - **Current Selection**
     - Nicholas, Laura M
     - Jambtali, Nicholas L
     - Nicholas, Leah
     - Nihon, Nicholas
     - Paz, Nicholas B
     - Morris, Nicholas H
     - Horvath, Nicholas D
     - Wright, Nicholas A
     - Smith, Nicholas S
     - Claytan, Nicholas E

   ![General Data](image2)

   - **Name**
     - Last Name: Nicholas
     - First Name: Leah
   - **User ID**: Idrich2
   - **Communication**
     - Telephone: 859 323-8069
     - Mobile Phone Number: 1295769203921357376
     - Fax: 859 323-0165
   - **E-Mail Address**: Leah.Nicholas@sky.uky.edu

2. **Next, click the box icon** to the left of desired name.

   ![Search For People](image3)

3. **Choose “Apply”**

   ![Search For People](image4)

4. **Name populates in field**.

5. **Choose “SUBMIT”**

   ![Universal Worklist](image5)

   - **Universal Worklist: Forward Items Approve Shopping Cart 90000001122 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.”

   ![Submit](image6)

   - Nicholas, Leah

   - **Item was forwarded successfully**

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myHelp Website: http://myhelp.uky.edu/rwd/HTML/index.html
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.

INBOX OF Recipient

Document displays