

Document Workflow Template

Map who drafts, checks, signs off and stores a file, and in which order: one stage per row.

DOCUMENT WORKFLOW

e.g. Contract approval

TRIGGER (WHAT STARTS THE ROUTE)

e.g. a request form, or a file landing in a shared folder

Your Workflow

STAGE	OWNER	ACTION	DEADLINE	NEXT STEP

Reference: Contract Approval

A small team approving a supplier contract. Deadlines and the threshold are example values.

STAGE	OWNER	ACTION	DEADLINE	NEXT STEP
Draft	Requester	Drafts the contract or logs the one received from the supplier	Same business day as the request	Legal review
Legal review	Legal	Checks the terms and returns the contract to Draft with comments when it needs changes	3 business days after Draft	Finance approval, or back to Draft
Finance approval	Finance	Approves cost and payment terms. Contracts above \$25,000 go to an extra approval stage with the finance director	2 business days after Legal review	Signing
Signing	Authorised signer	Signs the approved contract electronically	1 business day after Finance approval	Distribute
Distribute	Requester	Sends a copy of the signed contract to the supplier and to Finance	Same business day as signing	Store
Store	Requester	Moves the signed contract to the controlled contract repository with its comments, decisions and timestamps attached	Same business day as distribution	Route complete, contract filed

Before You Use It

- ☐ Follow one real file through the current route and note who receives it, what each person decides, and where it waits
- ☐ Name a person or role as owner of every stage
- ☐ Write a pass criterion for each review and a due date for each stage
- ☐ State the conditions that change the path, such as an extra approval above a set value
- ☐ Cut any review that adds a sign-off without adding a check
- ☐ Test the route with a representative document, then walk each owner through their stage before go-live
- ☐ Track completion times, overdue tasks, rejections and bottlenecks, and revise the route when people or documents change