Approval - Annotations and approvers

Shaun Gray - 2016-06-28 - Collaborate - Online Approval

AT A GLANCE:

01. Login to approval

02. Locate the approval

03. Open the approval

04. Check the approval

05. Make a decision on the approval

ADDITIONAL OPTIONS:

- View a previous approval version

- Download the approval file

- Add additional collaborators

- Check approval status and corrections

You will receive an email notification to alert you that you have been added to an online approval.

01. Login to Approval

To access approval go to the notification email and select the link. Alternatively you can log in to the approval application by entering the URL.

02. Locate the approval

In the approval dashboard, locate the required approval.

03. Open the approval

Select the approval preview to open it in the approval application.

04. Check the approval

To mark up changes on the approval, select the annotate button at the top of the screen.

There are three main annotation tools.

Marker: this allows you place a pin on the page and enter comments into the annotation window.

Draw: this allows you to draw on the page using the pen tool or place a symbol on the page from those in the drop down list. Symbols and drawn areas can be changed in colour by using the colour selector. They can also be moved sing the cross hair before being saved. Once saved they are fixed in location.

Text: this appears when documents contain actual text (not vector or rasterised text). Areas of text can be highlighted and changes marked up.

Attachment/s can be added to each annotation if required

Note: when adding attachments to annotations, these must be referred to in the actual annotation to ensure users know to look for the attachment.

If wish to edit or remove a note that you have placed, select the note in the annotations column on the right hand side of the screen. Hover over the note information displayed on the screen, the delete (cross) and edit (pen) icons can be selected along side the note comments.

Note: You can only edit or delete your annotations

Other users annotations can be viewed by selecting their name in the user list. Each users annotations will appear in the annotations list below and these can be selected to be viewed on the approval.

You can add additional comments to other users annotations by selecting them and entering information against the annotation. This will retain their comment and add yours to it.

05. Make a decision on the approval

To make a decision on an approval select the decision drop down from the top menu bar.

Note: the exclusion of the pending a decision on an approval will lock the approval, removing the ability to make further corrections until the next version is uploaded for approval.

From the drop down list select from one of the following:

Pending: an approval can be flagged to let other users know that you are reviewing the approval. This function should only be used if you are awaiting external approval or you are awaiting offline information.

Changes Required: You have marked up changes on the file.

Approved: No further changes required.

Not Applicable: You may have been added to the approval but there is nothing on the approval that is relevant to you.

Additional options

- View a previous approval version

When opening an approval the most recent version of the approval will be displayed.

To view a previous version select the file name drop down in the top left of the tool bar. The most recent version will appear at the top of the list. Select a previous version and select view or select 2 versions to compare, the most recent version will appear on the left.

To exit version compare, select done in the version compare tool bar at the bottom right of the window. Alternatively you can return to the version selector drop down and select a single version to view.

- Download the approval file

The ability to download an approval file will depend on your individual privileges and the privileges applied to each individual approval, therefore these features may not be visible of may be greyed out in your tool bar options.

To download from within the approval application select the download icon found in the top right of the tool bar.

To download the approval file from your approval dashboard, select the tool icon on the required approval. Select download from the drop down list

- Add additional collaborators

The ability to add additional approvers will depend on your individual privileges and the privileges applied to each individual approval.

Additional internal and external users can be added after initial upload by selecting the tools icon along side the

required approval in the Approval dashboard.

Existing Users
To add existing users, select Access from the drop down list.

Blue highlighted users have already been added to this approval. Select additional collaborator groups and or collaborators to the approval if required. Select save to save changes.

Any users not required from a group can be de-selected by clicking on them

Individual collaborators settings can be changed by selecting the settings option on each user.

These will override the main user privileges. Access levels can be changed to Read Only, Reviewer and Reviewer & Approver

Note: as a general rule existing user access should be set to Reviewer & Approver.

New or external users
To add new or external users, select share from the drop down list. Select either the Share URL or Share download URL option. Enter the users first name, last name and email address. Select the required language from the drop down and select add for each user.

Select share from the base of the screen to send the approval to the approvers added.

- Check approval status & corrections

After an approval has been sent out for collaboration and pages have been marked up and completed by team members, you may wish to look at the overall approval status.

The approval status can be checked at any time by selecting approval tool icon on the required approval and selecting view details from the drop down list. This screen will default to the most recent version of the approval and will provide an overview of the entire approval.

Within the activity status area you can check the status of individual approvers and send reminder emails (access to this feature will depend on your user and approval privileges).

For external users you may also be able to revoke access by selecting the tool bar drop down along side each user, this feature will depend on your individual user privileges.

Team members who have completed the approval and made a decision will have completed in the decision made column.

SEE ATTACHED DOCUMENT

Attachments

- WL010_ApprovalC_Approver_QRG_1.0.pdf (37.57 KB)

Related Content

- Approval - Report generation
- Approval - Creation