Approval - Creation

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

AT A GLANCE:

01. Login to approval

02. Add new approval

03. Upload approval

04. Set approval access

05. Set deadline

06. Set destination folder

07. Select approval settings

08. Select add new approval

ADDITIONAL OPTIONS:

- Add additional collaborators

- Check approval status and corrections

- Check for and download attachment

- Upload new version

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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.

02. Add new approval

Select add new approval for the top right of the screen, the collaborate window will appear.

03. Upload approval

Within the collaborate window, drag and drop your file into the upload area.

Note: You can drag multiple files into this area if they have the same deadline and are going to the same approvers. It will create an individual approval for each with the same information.

You can upload PDFs, Images, SWF’s, Videos or ZIP files.

The uploaded file name will appear, rename if required. Select the Job name should be same as filename option if required.

04. Set approval access

A template is a pre-configured workflow. Select the required Template for your approval if you have one.

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

External users can be added by entering their details and a valid email address. Their access level if required. Include a message if required to go with the upload notification.

05. Set deadline

Under the details heading, select the approval deadline date and time.

06. Set Destination folder

Approvals can be sorted into folders, under the Organise heading, select the destination folder for this approval. This is optional.

07. Select approval settings

All options will default to off with the exclusion of Allow users to download the original file.

Other optional settings include:
- Lock the proof when first decision is made
- Lock the proof when all decisions are made
- Only one decision required

08. Select Add new approval

Select add new approval to save and distribute the approval.

ADDITIONAL OPTIONS

- 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.

ACCESS - 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

SHARE - 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 these 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.

For external users you can also revoke access by selecting the tool bar drop down along side each user.

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

- Check for & download attachments

Attachments will be referred to in the comments of an annotation.

To download attachments, open the approval and locate the required annotation and download the attachments**.**

- Upload new version

From the approval task list, select the tool bar on the required approval (this will appear when hovering on the approval). In the drop down list, select ‘add new version’.

Follow the previous steps 03-08 to upload the approval.

Uncheck the ‘job name should be same as filename’. This allows the approval to retain the existing name.

Note: The approval will continue through the above process until the file has been approved.

SEE ATTACHED DOCUMENT

Attachments

- WL011_ApprovalC_Creator_QRG_1.0.pdf (37.49 KB)

Related Content

- Approval - Annotations and approvers
- Approval - Report generation