

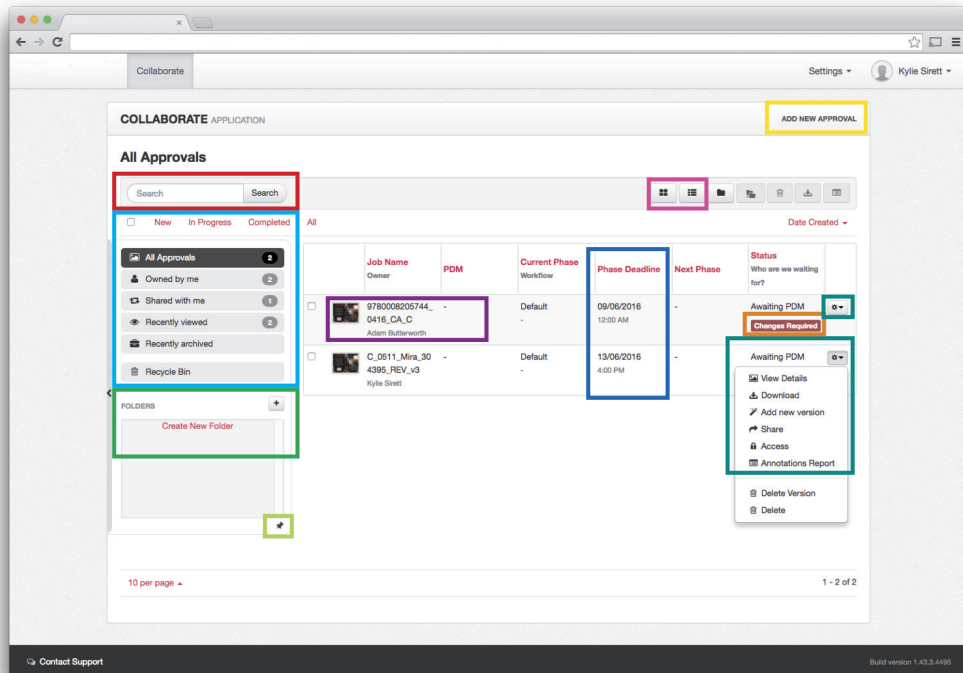
## Approval - Tools guide

Kylie Sirett - 2016-07-06 - [Collaborate - Online Approval](#)

**Collaboration Tools - Dashboard**

## ONLINE APPROVAL - DASHBOARD

All available dashboard functions in Online Approval have been outlined below to assist you when accessing approval files.



**Search** - Allows you to search for specific jobs using their job name or part of their job name.

**Filters** - Allows you to filter your approval list to a specific job status. The top red filters are: New, In Progress and Completed.

The left filters include: All Approvals, Owned By Me, Shared with Me, Recently Viewed, Recently Archived and Recycle Bin.

**Folders** - Folders can be used to sort approvals into departments, projects or jobs. Folders can be created within folders.

**Approval List** - Lists all of the approvals you currently have access to. The list can be re-ordered by selecting the heading in the top panel.

**Deadline** - The deadline date and time is displayed for each approval.

**Thumbnail/List View** - The approval dashboard will initially default to thumbnail view, change to list view here. List view displays more approval information.

**Status** - The approval status will update once decisions on an approval have been made. If you hover over this area a list of all decision makers and their decisions will be displayed.

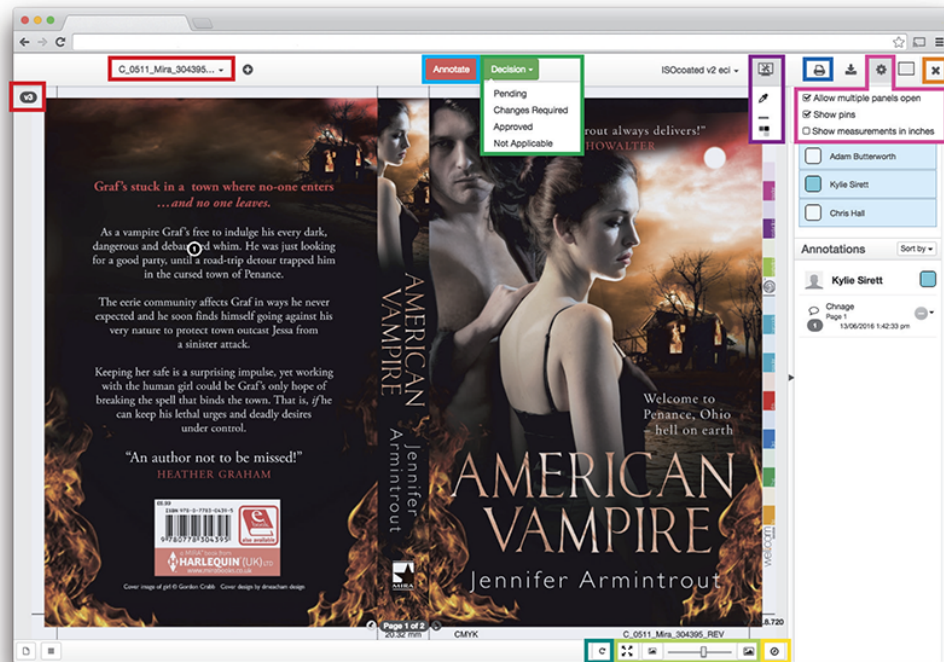
**Tool Drop Down** - Along side each approval is the tool drop down. In this area you can view approval details, download, add new versions (privilege based), share and grant access (add additional approvers) and access an annotation report. Some users may have the privileges to delete versions or approvals.

**Filter Panel Show/Hide** - The filter panel can be hidden by selecting the pin in the bottom right of that area.

**Add New Approval** - Depending on user privileges, some users will have the ability to add new approvals.

## ONLINE APPROVAL - APPROVAL APPLICATION

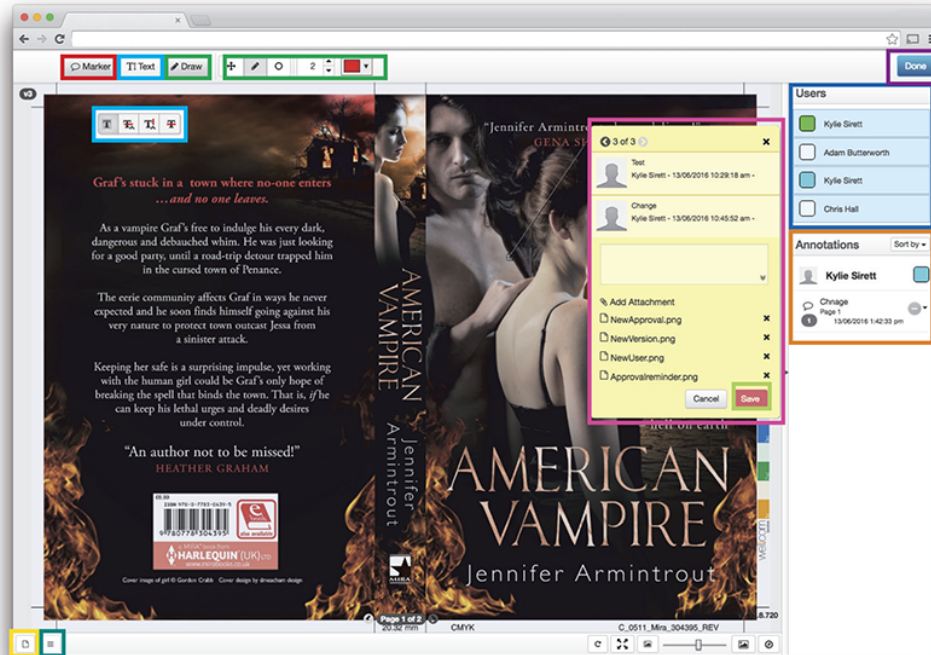
All available note functions in Online Approval have been outlined below to assist you when marking up your corrections.



- **Approval Name and Version Number** - This area displays the approval name and the version number of the approval displayed.
- **Annotate** - Allows access to the annotation tools. The annotation tools allow you to mark-up changes on the approval. Annotation tools are explained in detail on the pages to follow.
- **Decision** - The decision drop down is selected after the approval has been checked. Choose from, Pending, Changes Required, Approved and Not Applicable.
- **Soft Proofing Tools** - Within the soft proofing tool drop down you have access to an eye dropper (to take a colour reading of any area in the approval), measure and separations display.
- **Annotation Report** - Select the annotation report tool to create a report of all of the changes marked up on the approval. This can also be created from the dashboard.
- **Panel Settings** - The panel settings tool drop down gives you options to allow multiple panels open (both users and annotations panels), show pins (shows and hides the annotation pins) and to show measurements in inches. The default is as displayed.
- **Close** - The cross allows you to close the approval and return to the dashboard.
- **Rotate** - Allows to rotate the page displayed to assist with checking the file.
- **Fit to Window, Enlarge and Reduce** - The enlarge and reduce slider allows you to increase and decrease the size of the page displayed.  
The fit to window allows to fit the entire page in the display area.
- **Navigator** - When selected, on an enlarged page, the navigator allows you to move the outlined area around the page to select the area to be viewed.

## ONLINE APPROVAL - APPROVAL APPLICATION

Functions of the key Online Approval tools have been outlined below to assist you when marking up your corrections.

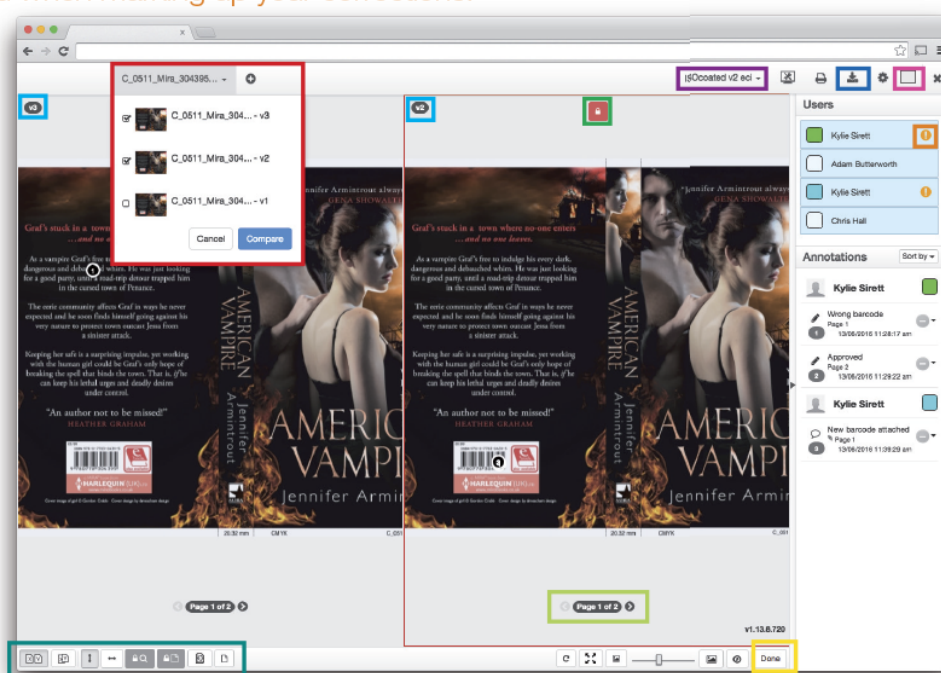


- ☐ **Marker** - Allows you to place a marker anywhere on the page and add a comment in the annotation window.
- ☐ **Text Tool** - Is only visible when the document contains actual text. You can highlight the text you need to change and this will appear in the annotation window. The additional tool panel allows you to select replace, insert or delete.
- ☐ **Draw Tool** - The draw tool contains both the pencil and the shape tool. The pencil allows you freehand draw areas. The shape tool allows you to choose different shapes and place on the page. The colour of the shape can be changed by using the colour selector.
- ☐ **Exit Annotation Tools** - Select done to exit the annotation tools.
- ☐ **User List** - Displays the list of approvers added to this approval. Clicking on the user you can toggle their annotations on and off from the annotation list.

- ☐ **Annotation List** - List of annotations on the page from the selected users above. Displayed users can be turned on and off in the user area above.
- ☐ **Annotation Window** - Allows you to add comments or changes to the page. You can also add additional comments to other users annotations, Select add attachments to upload attachments to the annotation. You can also edit and delete your own annotations by hovering over the change, the cross (delete) and the pen (edit) tools will appear
- ☐ **Annotation Save** - Select save to save the annotation to the approval.
- ☐ **Page Selector** - If the approval contains multiple pages you can view thumbnails by selecting this option. Thumbnails can be selected to move to additional pages.
- ☐ **All Annotation Display** - Select this option to display all annotations on screen.

## ONLINE APPROVAL - COMPARE SCREEN

All available note functions in Online Approval have been outlined below to assist you when marking up your corrections.



- ☐ **Version Selector** - If previous versions are available they can be accessed in this area. In this area you can also select multiple versions to compare.
- ☐ **Version Display** - The version number is displayed in the top left of each page displayed.
- ☐ **Page Lock** - The page lock will be displayed on pages when no further changes can be made, for example previous versions or versions that have reached the studio for changes.
- ☐ **Page Colour Profile** - If profiling is being used the profile is displayed here. Alternative profiles can be selected for viewing.
- ☐ **Download** - The file uploaded can be downloaded if you have the correct user privileges.
- ☐ **Change Background Colour** - Allows you to change the background colour for easier viewing.

- ☐ **Approval Indicator** - As users make decisions on the approval their decision will be indicated along side their name in the user list. Tick for approved, exclamation mark for changes required.
- ☐ **Compare Tool Bar** - Hovering over each of the tools will display the name of each tool.  
Tool options are: view side by side, overlay view, Compare vertical and compare horizontal, sync lock (To enlarge and reduce both pages together), sync pages (in multi- page documents, navigates through pages together)
- ☐ **Page Selector** - Allows you to move backwards and forwards between multi-page approvals.
- ☐ **Done** - This allows you to exit the compare tool.

### Attachments

- [WL013\\_OLAC\\_ToolsGuide\\_1.0.pdf \(2.12 MB\)](#)