

Approve a Pending Document

When a policy comes due for review, the Owner kicks off the Approval Process after first getting the opportunity to make updates or modifications.

Each time the policy is modified, a summary of changes must be included. If the user starting the Approval Process is also part of the Approval Workflow, they can simultaneously mark their approval and start the workflow. This is optional and the checkbox can be unclicked if desired.

When a pending document requires your approval, you may be notified by email. The Requiring Approval report on the Home tab will also display the top five policies in need of your approval.

Click a policy title to open the pending version. A pending version is visible only to users who are working on this policy or have elevated permissions.

After reviewing the content, if no changes are needed, provide any feedback and click the Approve Policy button.

If your approval is required for multiple policies, it may be possible to approve them in bulk.

Click the Requiring Your Approval header on the home tab to view the full list of policies.

Unchanged policies can be approved in bulk. Use the Select All checkbox or click individual checkboxes to select policies.

Leave a comment explaining why the policies were approved in bulk, then click the Bulk Approve policies button.

Any policies that are new or have revisions will still need to be reviewed individually.

When the Approval Workflow completes, the policies will be active and viewable by all users.