

Edit a Pending Document

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 the report header to view the full list if more than five policies require your attention.

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, you may decide this version is not satisfactory and changes are needed.

To make or express the desired changes, click Edit.

A new draft will be made whether you modify the content or not. Use the Editor to update the content if desired.

Either way, provide a description of the changes or a detailed explanation of the changes you hope to see in the Summary of Changes box, then click the Restart Approval Process button to send the pending version of this policy to the Approvers on the first step of the workflow.