

Approver Guide

Purpose: You have been designated as an approver for your departmental web site. SharePoint is the platform on which the new web site is built. You are a part of a work flow that starts with a content editor. The content editor will review the various pages that make up a particular degree. The content editor will make corrections/modifications/additions as well as verify all the courses that make up the requirements. You need to be able to check the content editor's work, verify its correctness. You can approve or reject content as well as request changes. Once you have approved the content, it becomes viewable by everyone visiting your SharePoint web site.

Basic Workflow

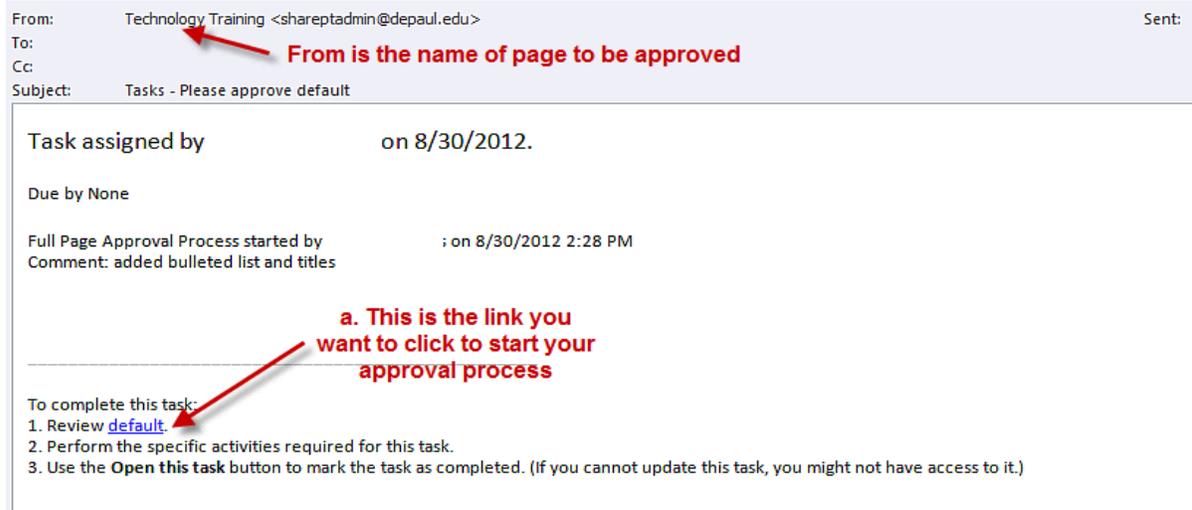
1. You will **receive an email** with a subject line naming the degree. At the top in bold letting you will see **"Tasks – Please approve (Degree Name)**
 - a. You will see who has started the approval process.
 - b. There will be a comment about the actions the content editor or approver has done on the page.
 - c. At the bottom you will see a numbered list with instructions and a link to the page you need to approve.
 - d. Click on the link.
2. You will be asked to authenticate and the page where you need to approve will open.
3. You will click on "View Tasks".
4. An approval workflow dialog box will open.
5. Make a choice
 - a. Approve
 - b. Request Changes
 - c. Reject
6. Complete workflow process and send to next approver in chain.

Getting Started

1. **Open up a web browser.** If you are working with the Windows operating system, Internet Explorer is the preferred browser. If you are working on an Apple Mac product, please use Mozilla Firefox.

You will **start with the Email you received** with you assigned task as shown below.

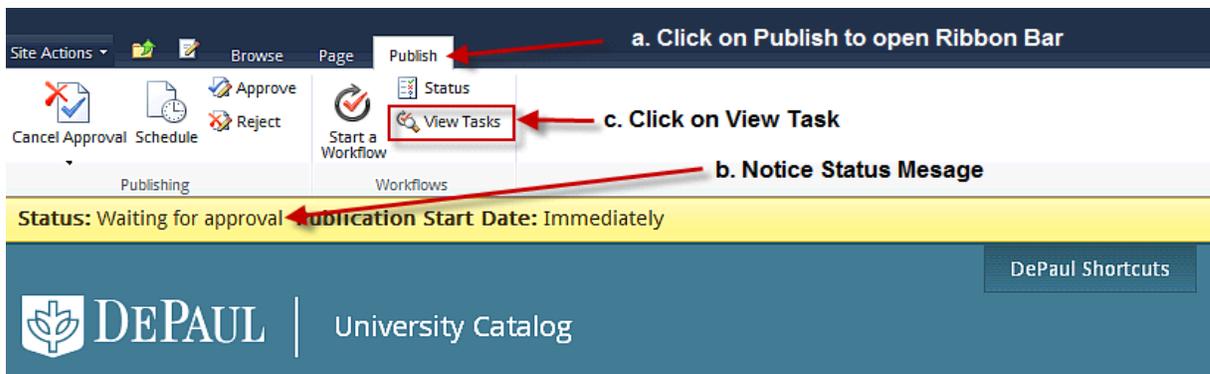
- a. Click on the link to the page that you need to approve. If you are working with the first page of a section (also known as a sub site), note that this overview page is labeled as "default". You will need to **authenticate** using your Campus Connection User ID and Password to start the approval process.



2. You will see a dark blue navigation and a yellow status bar at the top of the page as below to verify that you are ready to approve or reject content. A white "Browse" tab will be open.



3. You will be at the page where you need to do your approval.
- a. **Click on the Publish tab** to open up the ribbon bar to start the approve/reject process.
 - b. Notice that the yellow status bar's message "**Waiting for approval**".
 - c. Click on "**View Tasks**" to start your work.



4. **Note:** This SharePoint site has been **branded** by DePaul University for **readability and optimal viewing**, your **only task** is to **review and approve/reject content**. You do not need to be worried about font style or size. If the content editor needed to create headings or other paragraphs there are pre-built templates called **Markup Styles**.

5. The following dialog box opens up after you click on “**View Tasks**”
 - a. **Place a comment** in the comment box. Whatever action you are taking should be documented here. If you are rejecting, say why.
 - b. Choose **Cancel** if you want to **review** the page. Choose **Approve** if the content looks correct. If you see wording, punctuation or other grammatical **errors**, choose “**Request Change**”. Only **Reject**, if **totally wrong**.

Site Actions Patterson, Russ

Technology Training > Workflow Tasks: Please approve default

DePaul University Catalog Degree Requirements Course Descriptions Colleges & Schools Search this site... Academic Student Handbooks Catalog Archive

Delete Item

This workflow task applies to default.

Status	Not Started
Requested By	rpatters ;
Consolidated Comments	Full Page Approval Process started by Patterson, Russ on 8/30/2012 2:28 PM Comment: added bulleted list and titles These are the comments of the requestor and all previous participants.
Due Date	
Comments	a. Insert comment here about your actions This message will be included in your response.

b. Choose Approve, Reject, Cancel or Request Change →

6. If you click on “**Request Change**”, the following dialog box opens.
 - a. You should send it back to the person who submitted it to you for Approval. If you leave the “**Request Change From**” blank, it will automatically go back to this person. If you want to send it back to the original content editor, you need to enter their campus connection user id or you can use the address book icon to look up their name.
 - b. Fill out the “**New Request**” box about the change you need to have done.
 - c. Click on **Send**.

Site Actions Patterson, Russ

DePaul University Catalog Degree Requirements Course Descriptions Colleges & Schools Search this site... Academic Student Handbooks Catalog Archive

Delete Item

This workflow task applies to default.

Request Change From	 Enter the name of the person to request a change from. If this field is left blank, the change request will be sent to the person who started the workflow.
New Request	This message will be included with your request.
New Duration	The amount of time until the task is due. To keep the existing due date, leave this field blank. To remove the due date, type the number '0'. Choose the units by using the New Duration Units.
New Duration Units	Day(s) Define the units of time used by the New Duration.

a. Leave blank to send back or enter content editor ID →

b. Click Send →

7. If you click on “**Reject**”, the **workflow is cancelled** and a notification will be sent to the content editor who submitted the page for approval. The page rolls back to its state before the editor did any work.
8. If you click on “**Approve**”, a system message appears about “**Processing**”. Let the process finish and you will return to the page where you started your approval process. The SharePoint workflow has automatically published the page and you will notice that there is no yellow status bar.