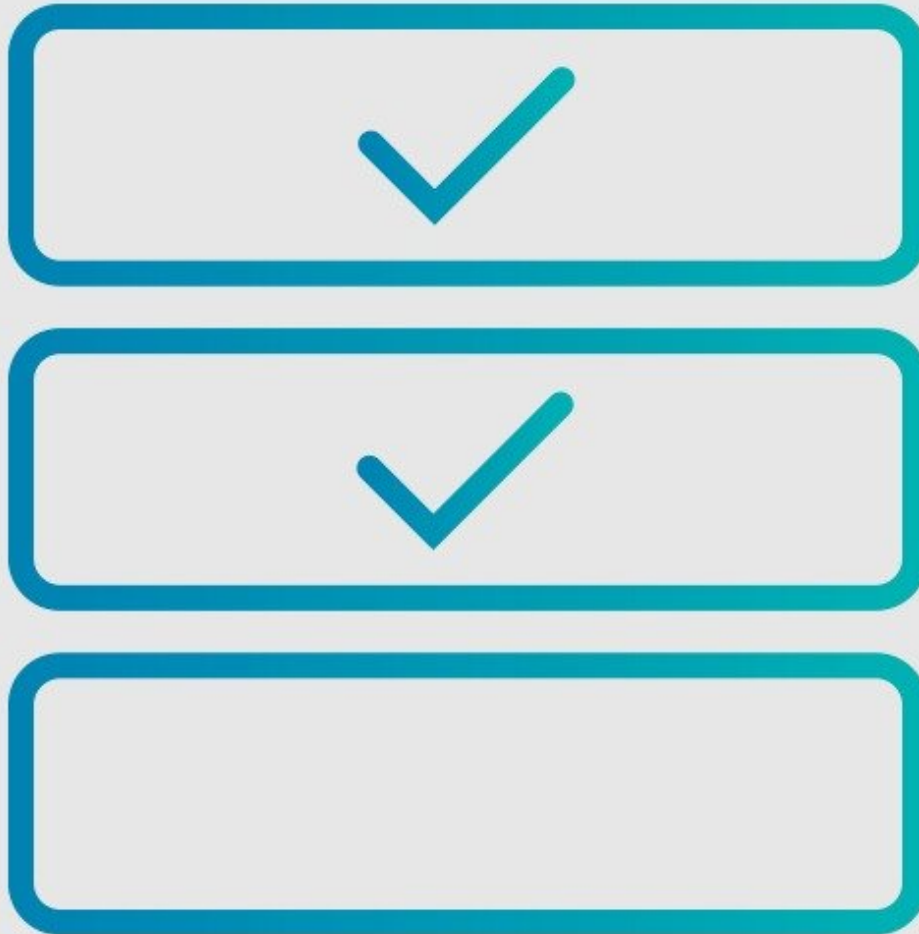




How to Assign an Approval Process to a Guide

This guide demonstrates how to assign an Approval Process to a guide.

Written By: Dozuki System



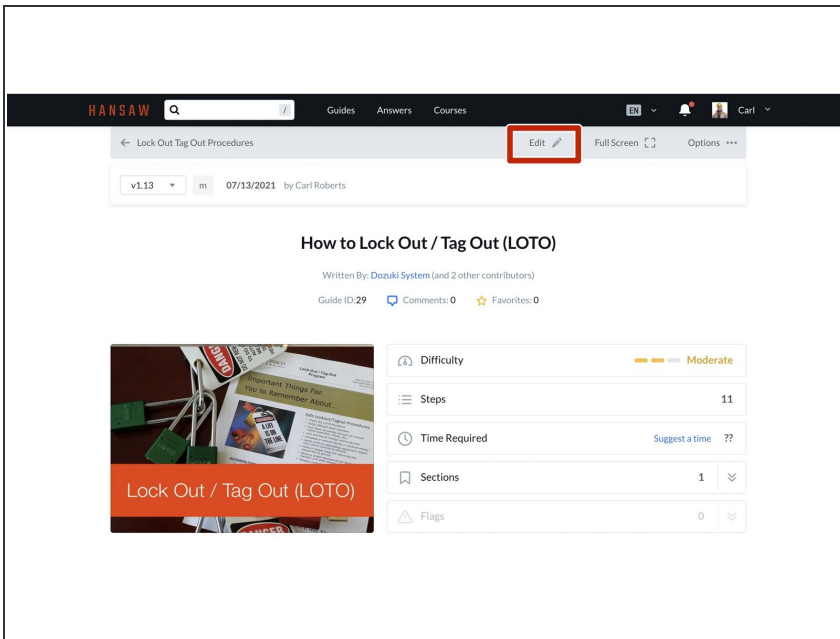
INTRODUCTION

This guide demonstrates how to assign an Approval Process to a guide.

Requirements

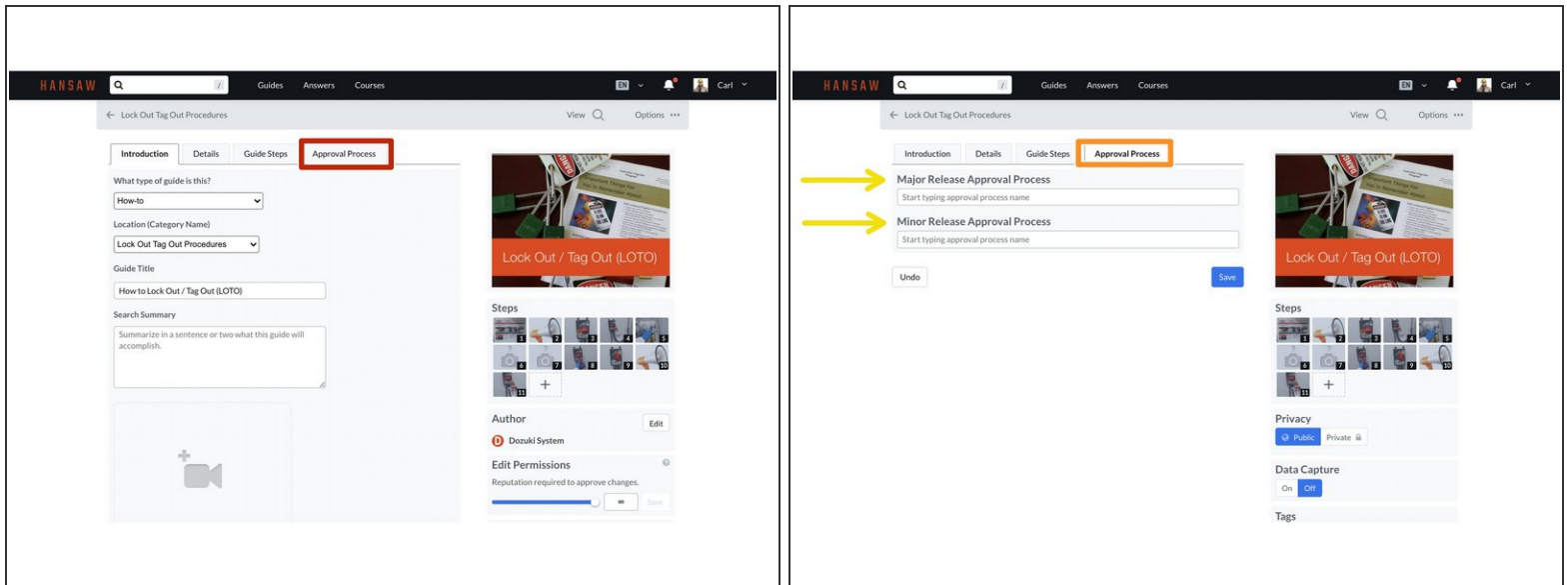
- Approval Processes can only be applied to guides if you have the [Version Control](#) feature activated on your Dozuki site. Contact support@dozuki.com to request these features to be activated.
- Only **Site Administrators** have permission to view, create, and assign Approval Processes.

Step 1 — Open Guide Edit Page



- Open the guide to which you want to add an Approval Process.
- Click on the **Edit** button in the upper-right of the page, beneath the site header.

Step 2 — Open Guide Approval Process Tab



- Click on the **Approval Process** tab.
- The **Approval Process** field will open to give you two release options: **Major** and **Minor**.
- ① Only site Administrators have access to this tab.
- By default, you have the option to assign separate Approval Processes to each **Major Releases** and **Minor Releases** of a guide.
- ✎ If you do not need this amount of flexibility for your document control, you can choose to deactivate the "Minor Release" option from your site by contacting **Dozuki Support**.

Step 3 — Assign Approval Processes

The first screenshot shows the 'Approval Process' tab with two input fields: 'Major Release Approval Process' and 'Minor Release Approval Process'. The 'Major Release Approval Process' field is highlighted with a red box. The second screenshot shows the 'Major Release Approval Process' dropdown menu with 'Manufacturing - LT 3X70' selected, indicated by an orange arrow. The third screenshot shows the 'Minor Release Approval Process' field highlighted with a yellow box.

- Click in the **Major Release Approval Process** field and begin typing in the name of the Approval Process that you want to assign for each version type.
- Select the correct Process from the available options provided.
- ⓘ If you do not see the process you need, you may need to [Create a New Approval Process](#).
- Repeat the above steps for the **Minor Release Approval Process**.

Step 4 — Approvals Process Best Practices

The figure consists of three side-by-side screenshots of a software interface for assigning approval processes. Each screenshot shows a list of approval processes with arrows indicating the assignment for 'Major Release Approval Process' and 'Minor Release Approval Process'.
- The first screenshot shows both Major and Minor release types assigned to 'Manufacturing - LT 3X70' (indicated by red arrows).
- The second screenshot shows the Major release type assigned to 'Manufacturing - LT 3X70' (orange arrow) and the Minor release type assigned to 'Quality Approval' (orange arrow).
- The third screenshot shows the Major release type assigned to 'Manufacturing - LT 3X70' (yellow arrow) and the Minor release type with an empty input field labeled 'Start typing approval process name' (yellow circle with a slash).
Each interface includes an 'Undo' button and a 'Save' button.

☛ You have the ability to assign three different Approval Processes to your guide. The processes are based on the type of release published. This gives you **flexibility** in your document control.

- **Strict Control:** Assign the same Approval Process to both release types.

① This means the new release will **ALWAYS** go through the same Approval Process, no matter which release type an Author chooses to publish.

- **Conditional Control:** Assign different Approval Processes to each release type.

① This means the new release will go through a different process, depending on which release type the Author chooses to publish.

- **Flexible Control:** Assign an Approval Process to Major releases but not Minor releases.

① This means that you are giving your Authors the ability to publish Minor releases of this guide **without** sending it through an Approval Process first.

Step 5 — Save and Complete

Major Release Approval Process

Manufacturing - LT 3X70

Minor Release Approval Process

Start typing approval process name

Undo

Save

- Click on the **Save** button to complete your Approval Process assignment.