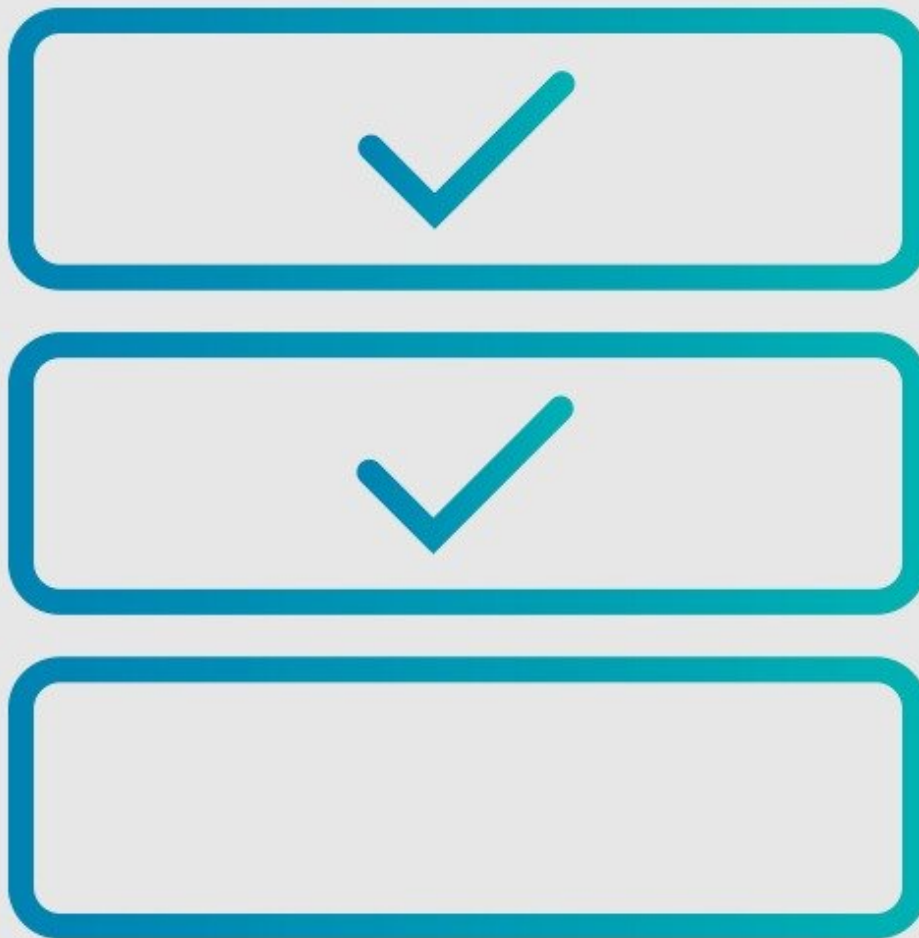




How to Create an Approval Process

This guide demonstrates how to create a new Approval Process on your Dozuki site.

Written By: Dozuki System



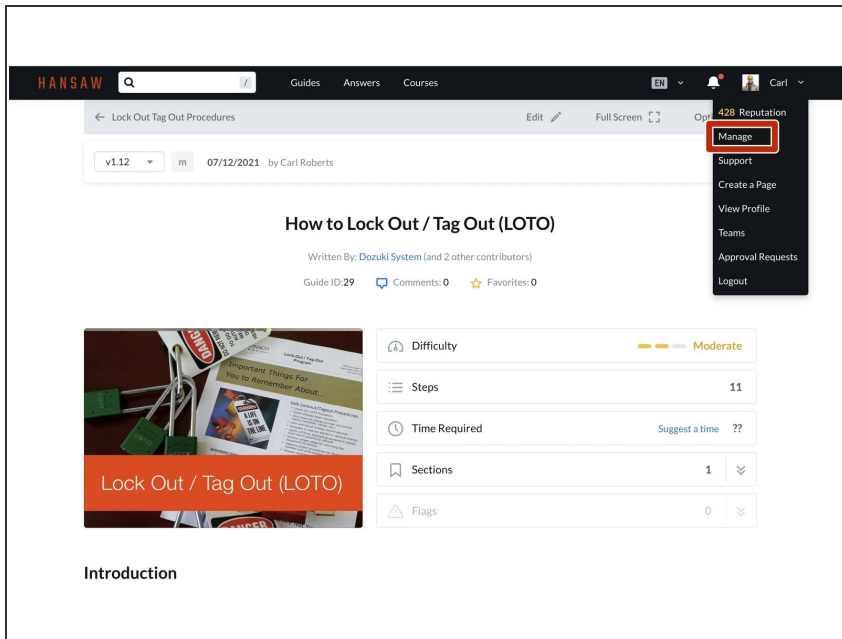
INTRODUCTION

This guide demonstrates how to create a new Approval Process on your Dozuki site.

Requirements

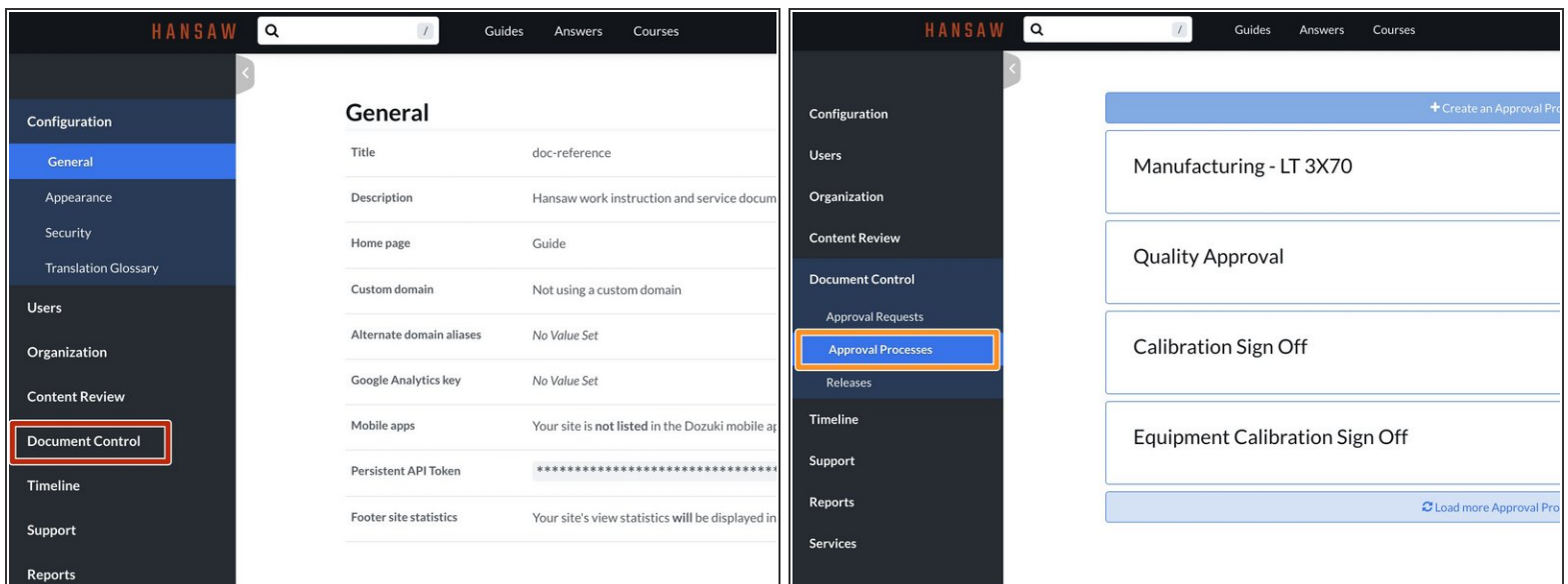
- Approval Processes can only be applied to guides, wikis, or category pages if you have the [Version Control](#) feature activated on your Dozuki site. Contact support@dozuki.com to request these feature activations!
- Only Administrators have permission to view, create, and assign Approval Processes.

Step 1 — Open Management Console



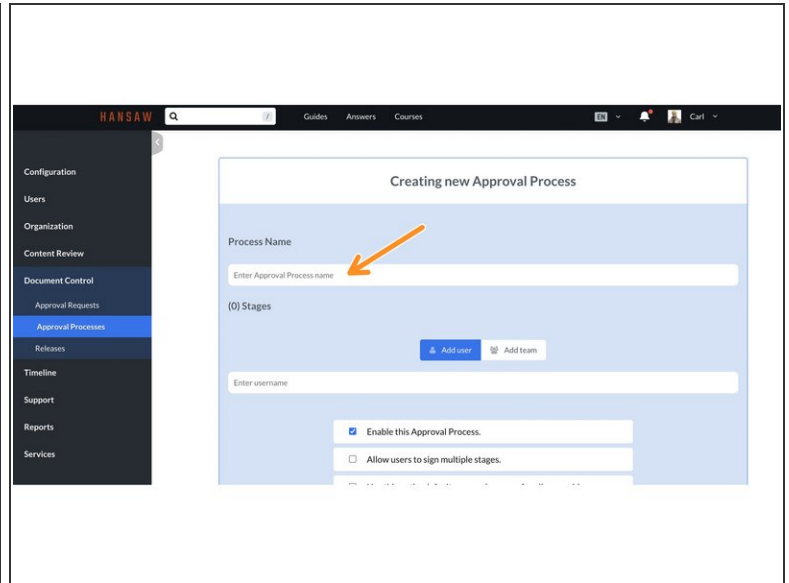
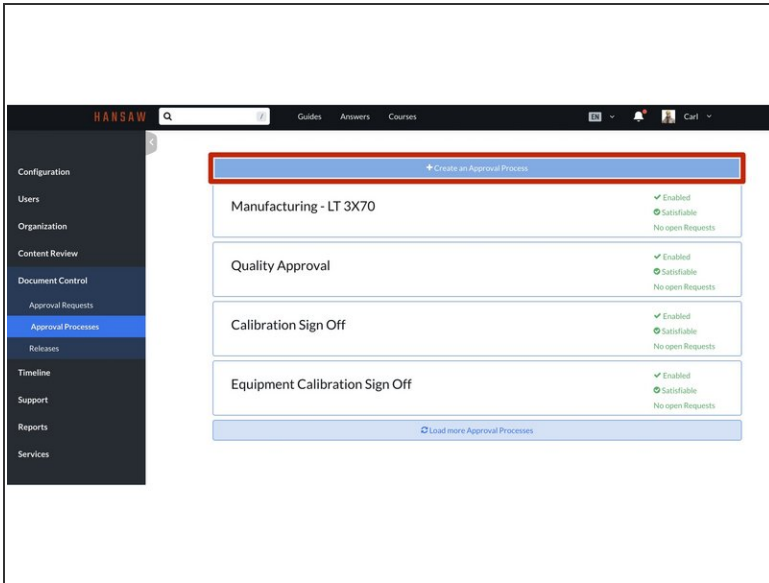
- Click on your username in the right side of the site header and select **Manage** from the drop-down menu.

Step 2 — Access Document Control



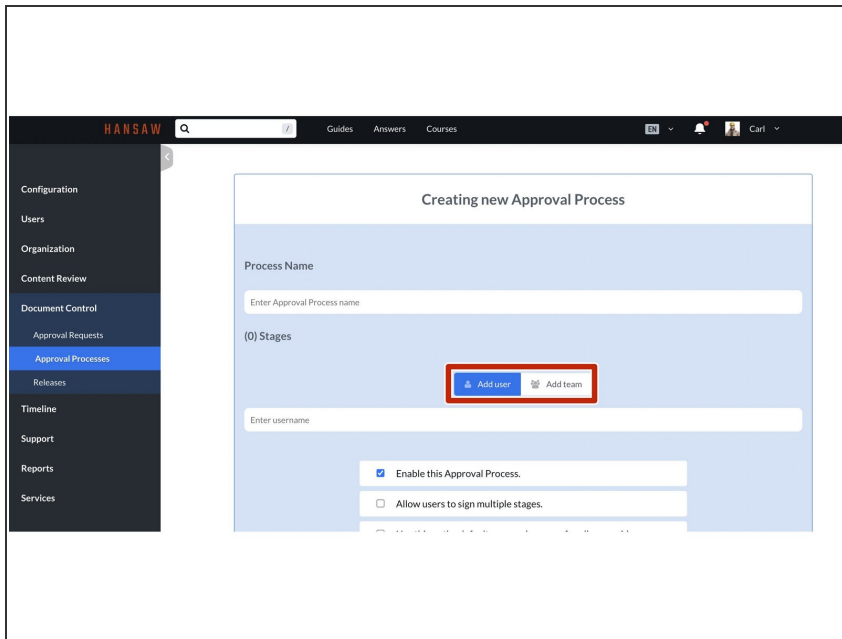
- Select **Document Control** from the Management Console navigation menu.
 - ❗ Only site administrators have access to Document Control settings.
- Select **Approval Processes** to open the dashboard page for the Approval Processes on your site.

Step 3 — Create a New Approval Process



- Click on the **Create an Approval Process** button to open the Approval Process Creation modal.
- Enter a name for your new Approval Process.
 - ❗ You can update or change the process name after you create the process.

Step 4 — Approval Stages

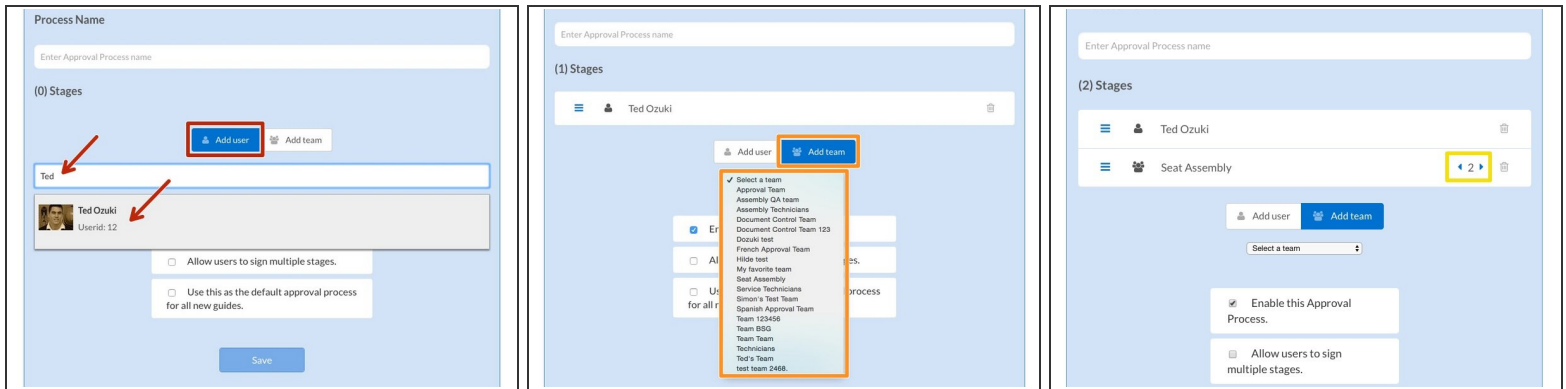


i A Stage refers to a specific user or a team of users whose digital signatures are required before a new version of a guide, wiki, or category page is published. Up to 10 stages can be arranged in your preferred order.

★ Once the user(s) of your first Stage have signed, then the user(s) of the second Stage can begin signing, and so on. You may assign any user to a Stage, and you can assign an unlimited number of users to a team.

● Use the toggle to select from an individual user or a team to assign as your first stage.

Step 5 — Assign Approval Stages



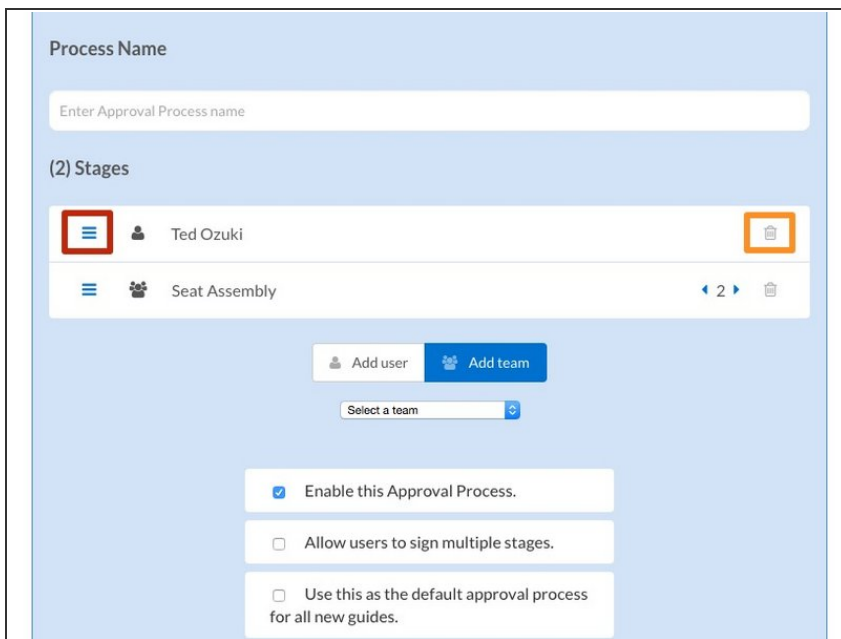
The first screenshot shows the 'Process Name' section with a text input field 'Enter Approval Process name'. Below it, the '(0) Stages' section has a search bar with 'Ted' entered. A red box highlights the 'Add user' button, and a red arrow points to the search bar. A second red arrow points to the user 'Ted Ozuki' in the results list. Below the list are two checkboxes: 'Allow users to sign multiple stages.' and 'Use this as the default approval process for all new guides.' A 'Save' button is at the bottom.

The second screenshot shows the '(1) Stages' section with a search bar containing 'Ted Ozuki'. A blue box highlights the 'Add team' button, and a blue arrow points to the team selection dropdown. A list of teams is shown, including 'Approval Team', 'Assembly DA team', 'Assembly Technicians', 'Document Control Team', 'Document Control Team 123', 'Dzuke test', 'French Approval Team', 'Hilde test', 'My favorite team', 'Seat Assembly', 'Service Technicians', 'Simon's Test Team', 'Spanish Approval Team', 'Team 123456', 'Team BSG', 'Team Team', 'Technicians', 'Ted's Team', and 'test team 2468'.

The third screenshot shows the '(2) Stages' section with a search bar containing 'Ted Ozuki'. A blue box highlights the 'Add team' button, and a blue arrow points to the team selection dropdown. A list of teams is shown, including 'Approval Team', 'Assembly DA team', 'Assembly Technicians', 'Document Control Team', 'Document Control Team 123', 'Dzuke test', 'French Approval Team', 'Hilde test', 'My favorite team', 'Seat Assembly', 'Service Technicians', 'Simon's Test Team', 'Spanish Approval Team', 'Team 123456', 'Team BSG', 'Team Team', 'Technicians', 'Ted's Team', and 'test team 2468'.

- To add a User as a stage: select **Add user** and begin typing the user's name in the field below. Select the user from the list of results that match your entry.
- To add a Team as a stage: select **Add team** and select the team from the drop-down menu below.
- Once the team is added as a stage, use the **arrows** to select how many user signatures you require from the team to sign off on that stage.

Step 6 — Changing Approval Stages



The screenshot shows the 'Process Name' section with a text input field 'Enter Approval Process name'. Below it, the '(2) Stages' section shows two stages: 'Ted Ozuki' and 'Seat Assembly'. The 'Ted Ozuki' stage has a red box around the three-line icon and an orange box around the trashcan icon. The 'Seat Assembly' stage has a blue box around the three-line icon and a blue box around the trashcan icon. Below the stages are buttons for 'Add user' and 'Add team', a 'Select a team' dropdown, and three checkboxes: 'Enable this Approval Process.', 'Allow users to sign multiple stages.', and 'Use this as the default approval process for all new guides.'

- To change the order of the approval stages: click and hold the **three lines symbol** and drag the stage up or down to the desired location.
- To remove an approval stage: click on the **trashcan** icon for that stage.

Step 7 — Approval Process Settings

(1) Stages

Line Leaders

Add user Add team

Select a team

☒ Enable this Approval Process.

☐ Allow users to sign multiple stages.

☐ Use this as the default approval process for all new guides, categories, and wikis.

Save

- Enabling the Approvals Process:
To allow this Approvals Process to be applied to guides, categories, and wikis.
- Allow Users to Sign Multiple Stages: Select this checkbox if you want a user (whether as an individual or a member of a team) to be able to sign multiple Stages of a specific Approvals Process.
- Making an Approval Process a Site Default: Select this checkbox to automatically assign an Approval Process to any new content created on your site.
- Click on the **Save** button to finish the creation of your new Approval Process.