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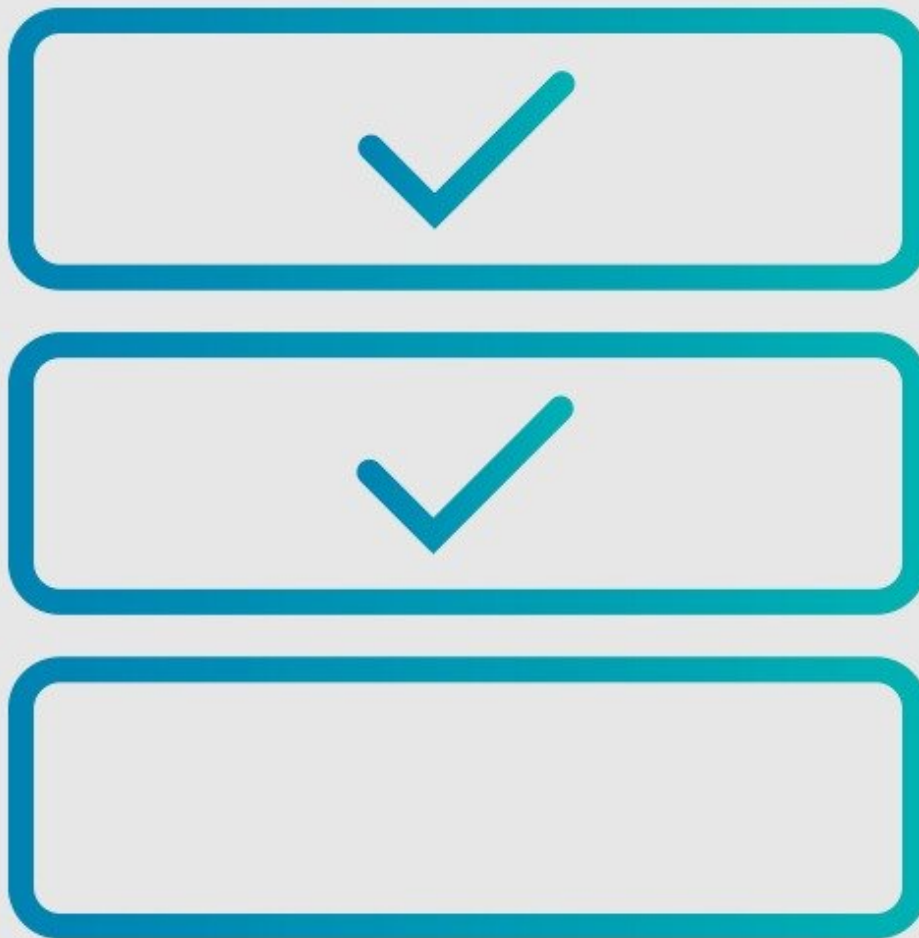
How to Assign an Approval Process to a Guide

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

Written By: Dozuki System
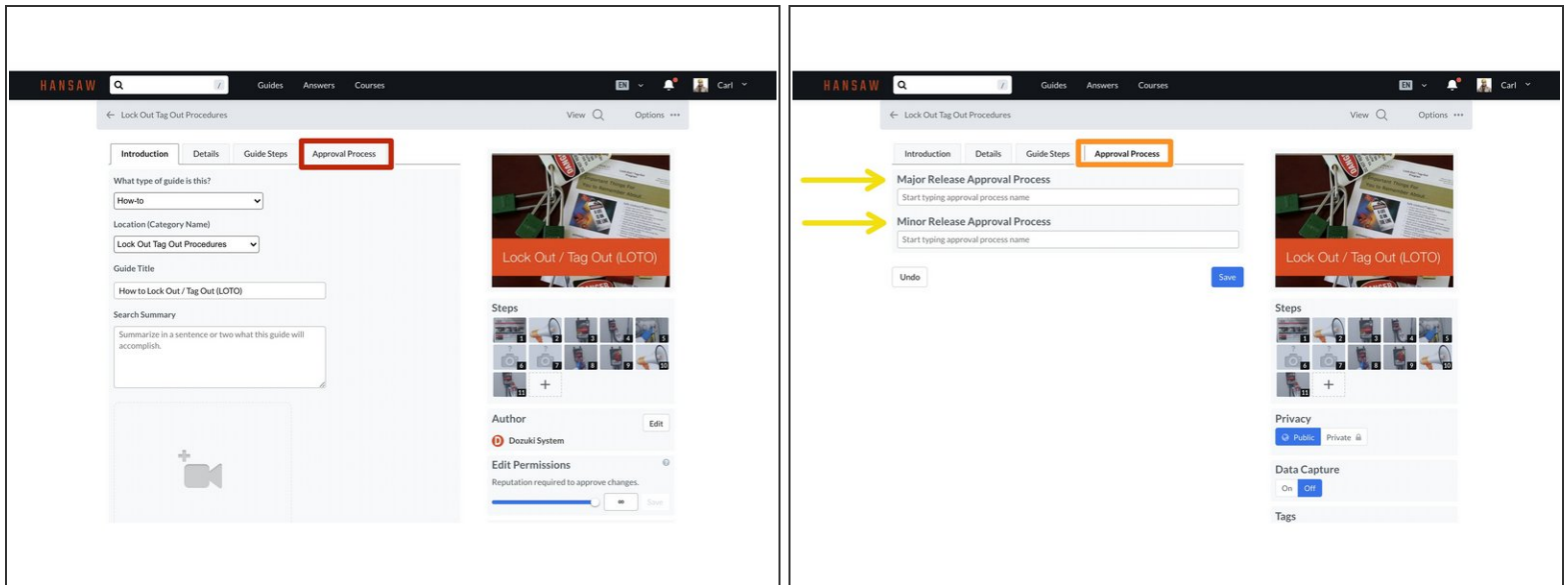
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INTRODUCTION

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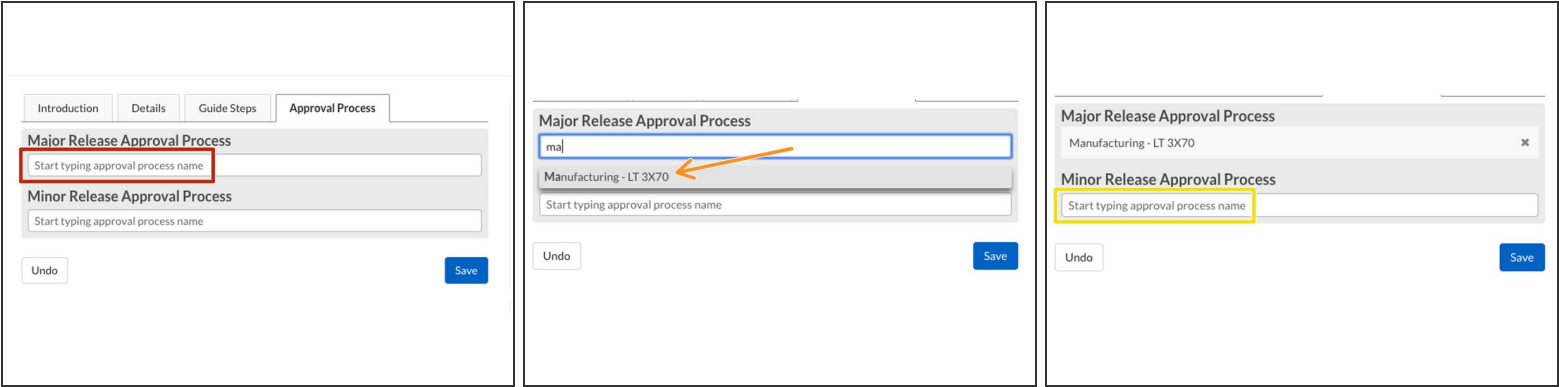
Requirements

- 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.

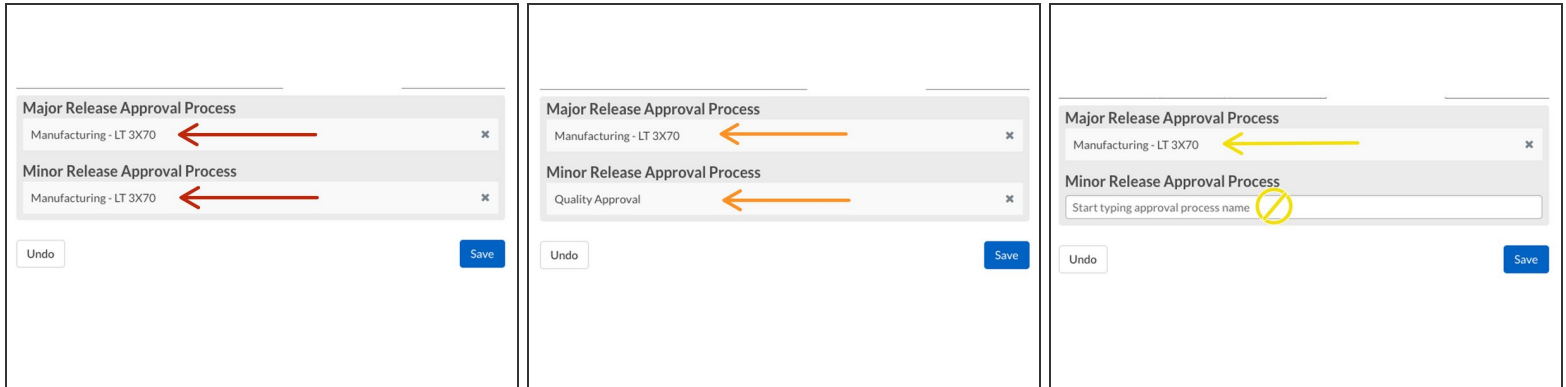## Step 1 — How to Assign an Approval Process to a Guide

- In a guide's editing interface, click on the **Approval Process** tab.

- The **Approval Process** field will open to give you two release options: **Major** and **Minor**.
  - ⓘ Only site Administrators have access to this tab.

- By default, you have the option to assign separate Approval Processes to each **Major Release** and **Minor Release** 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 2 — Assign Approval Processes

- 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 3 — Approvals Process Best Practices

- ⊡ 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.
  - ⓘ 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.
  - ⓘ 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.
  - ⓘ 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 4 — Required Approval Processes

⊡ For sites with the **Require Approval Process** feature enabled, guides cannot be published without an Approval Process in place.

ⓘ This feature can be enabled or disabled on the Management Console under **Configuration > General > Document Control.**

● If an approval process is not assigned to a guide when this feature is on:

● Alerts appear on the Approval Process menu, with asterisks indicating required fields.

● The **Save** button is grayed out and unselectable until an Approval Process is assigned.

● In Reference View, the **Create Release** button is replaced with **Assign Approval Process.**

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Step 5 — Save and Complete

Major Release Approval Process

Manufacturing - LT 3X70   ✕

Minor Release Approval Process

Start typing approval process name

Undo   Save

- Click **Save** to complete your Approval Process assignment.

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