



Approvers User Guide

Document Control Module



Introduction

Any Document Control system relies on a final backstop and approval from an administrator or manager. In StaffReady Document Control, these individuals are called Approvers.

Approvers are the final authority on whether a document revision will be approved or denied. This is the last step before a document can be published. Document Approvers are usually an organization's Medical Director, Senior Manager, or similar person with the authority to approve official documents.

Mastering the Approvers feature gives reassurance that documents are being finalized and approved correctly for the organization.

Table of Contents

(Please select any topic to skip to that section)

Adding Approvers pg. 3
Add Approvers Button pg. 4
Add Approver Link pg. 5
Add Approver with Email pg. 6
Remove or Replace Approvers pg. 7
Resources pg. 8

Adding Approvers

To begin adding **Approvers** to a document, navigate to the **Setup** tab of the Document Control module, select a document in the **Subject** folder, and then select the **Approvers** color bar to expand it. (Yellow box, Figure 1)

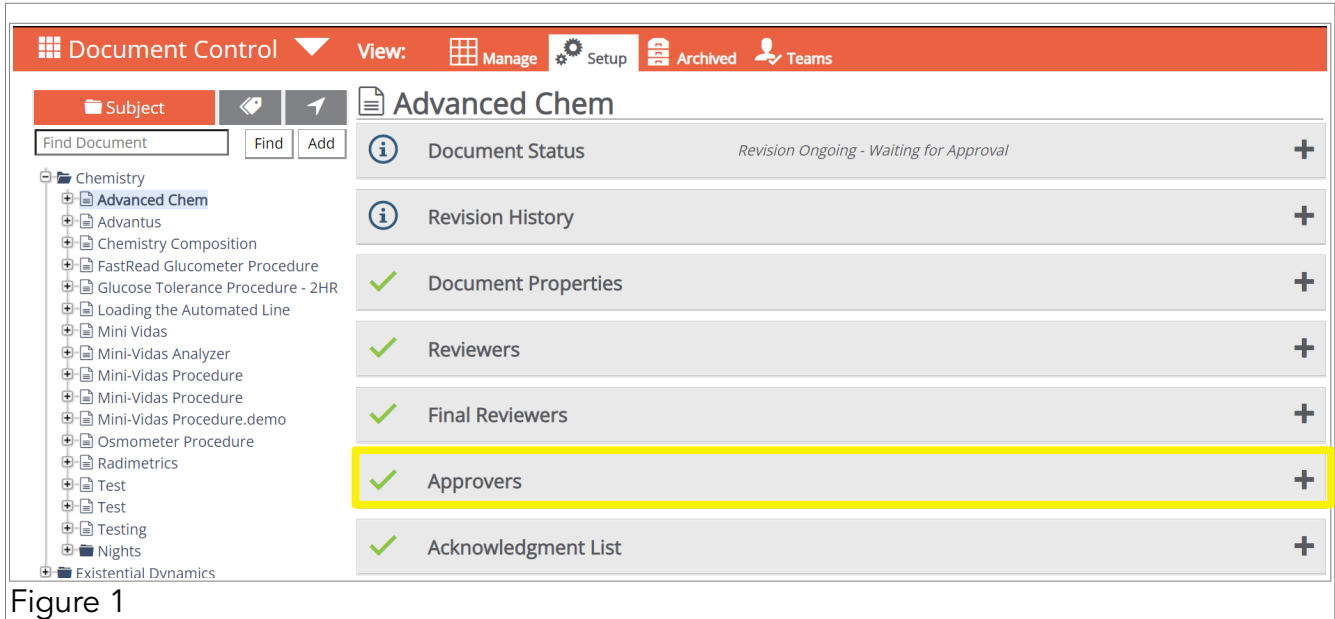


Figure 1

Within the **Approvers** color bar, select either the **Add Approvers** button (Yellow box, Figure 2) or **Add Approver** link. (Teal box, Figure 2)

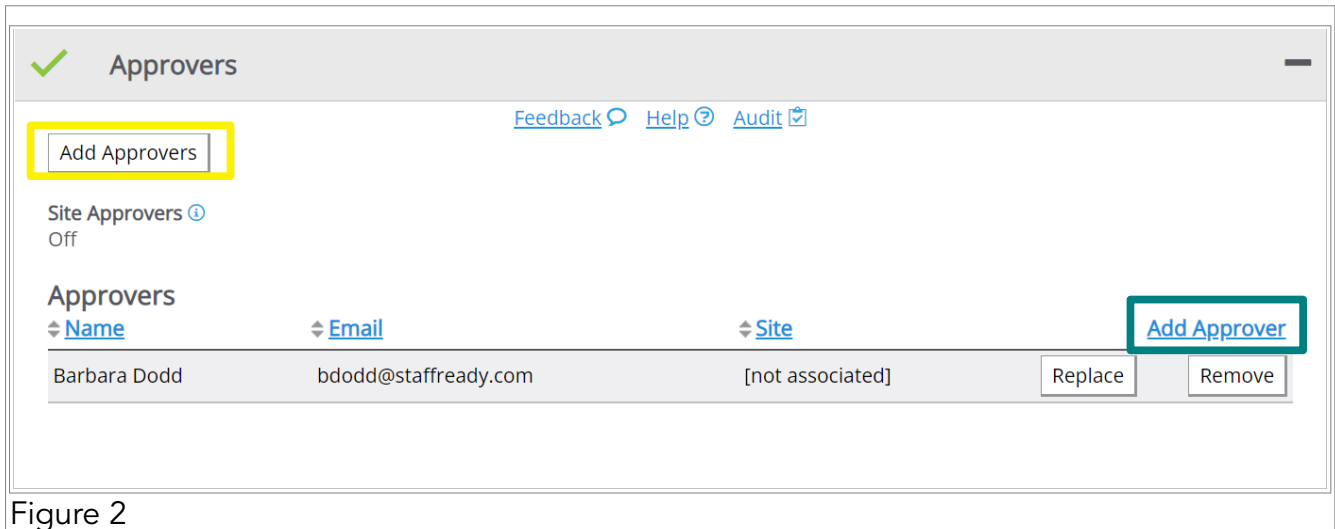


Figure 2

Add Approvers Button

If you selected the **Add Approvers** button, the **Add Employees** pop-up window will open. (Figure 1)

Locate your desired employee either by typing their name in (Yellow box, Figure 1) or by using the filters. (Teal box, Figure 2)

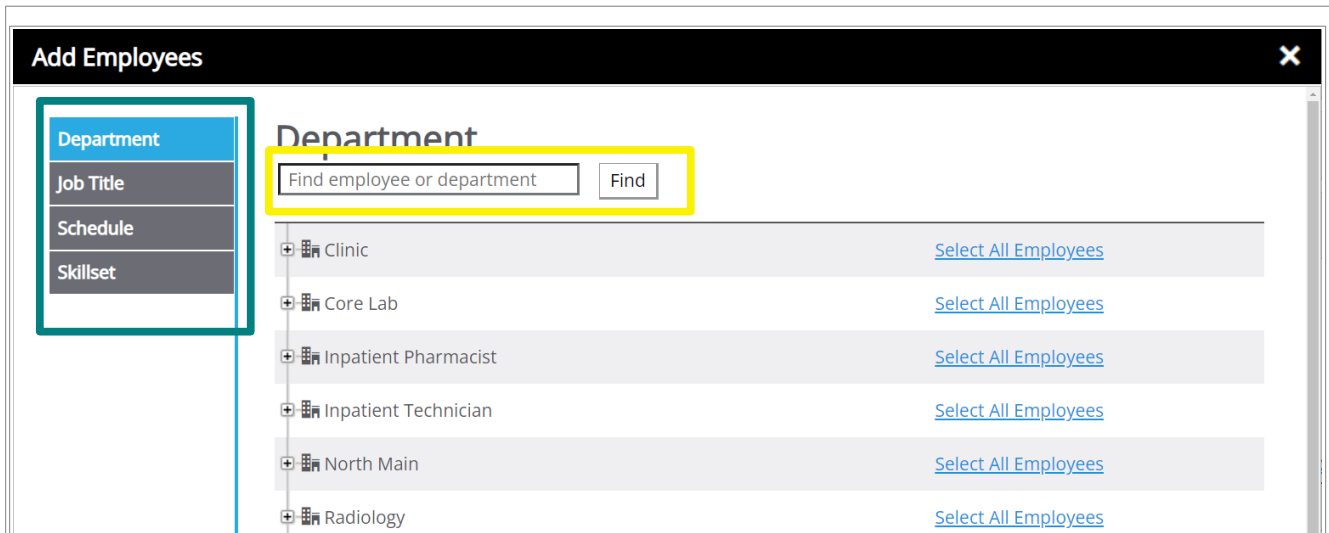


Figure 1

Once you've selected your employee, they will appear in the **Approvers** list inside the **Approvers** color bar. (Figure 2)

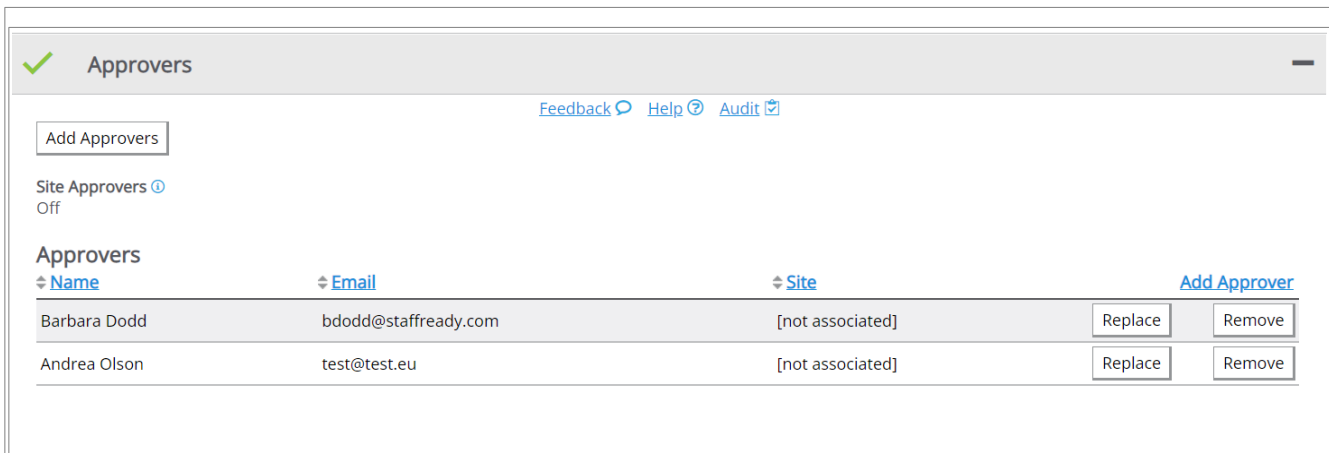


Figure 2

Add Approver Link

Adding an Approver using the **Add Approver** link allows you to customize a notification message to the employee(s) you add. Select the **Add Approver** link to open the **Add Document Approver** pop-up window. (Figure 1)

Add Document Approver X

Employee* ⓘ

Add Approver Without Email or [Generate Email](#)

Figure 1

Begin typing the employee's name and a list of names will appear containing similar names based on what you typed. (Yellow box, figure 2)

Once you've selected the employee, select either the **Add Approver Without Email** button (Teal box, Figure 2) if you want to add the employee without notifying them or the **Generate Email** link (Orange box, Figure 2) if you want to customize a notification message to them.

Add Document Approver X

Employee* ⓘ

Add Approver Without Email or [Generate Email](#)

- Gary Long
- Jason LaFavor
- Joe Lewis
- Jeff Loomis
- Laura Baird
- Leah Barrett
- Leigh Blank
- Leonard Curtis
- Lisa Gniot
- Logan Heck

Figure 2

Add Approver With Email

If you selected the **Generate Email** link on the previous page, the **Add Document Approver** pop-up window will update. (Figure 1)

First, enter in the employee's email address in the **Email Address** field.

Second, customize the text in the **Body** section. (Yellow box, Figure 1)

Customize your signature and then select the **Add and Send Email** button.

Add Document Approver [X]

Employee* ⓘ
Gary Long Add Approver Without Email or [Generate Email](#)

Email Address* ⓘ
glong@staffready.com

Subject* ⓘ
You've been invited to access a StaffReady Document

Body* ⓘ
Hello Gary Long,
You've been set as the Approver.

Signature* ⓘ
Sincerely,
StaffReady

Note: The name of the document will automatically added to the body of this email.

Add and Send Email

Figure 1

Remove or Replace Approvers

Periodically, your organization may have the need to remove or replace **Document Approvers**. To remove a document approver, navigate to the **Approvers** color bar and select the Remove button next to the employee you wish to remove. (Yellow box, Figure 1)

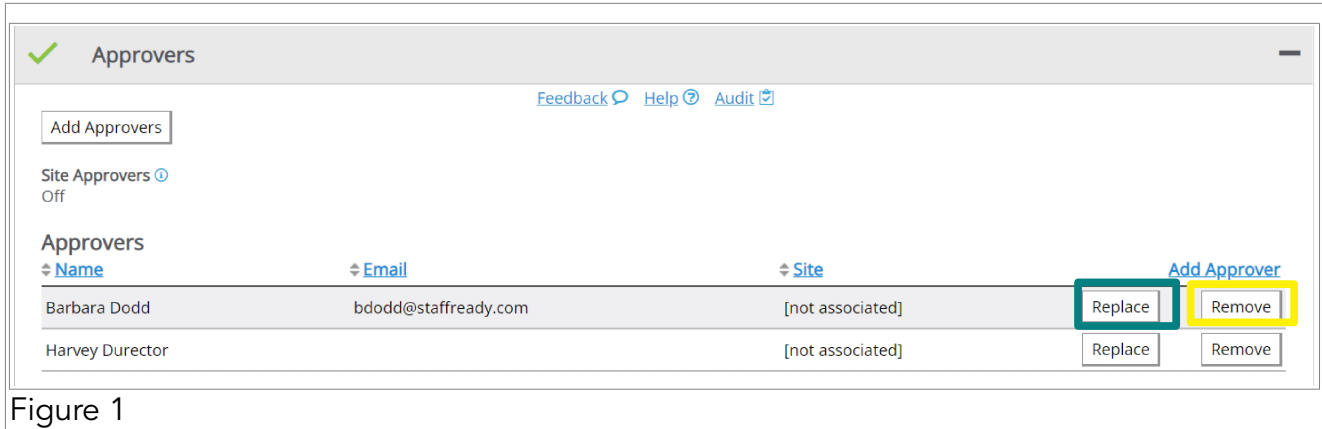


Figure 1

To replace a document approver, select the **Replace** button (Teal box, Figure 1) next to the approver you wish to replace. This will open the **Replace Approver** pop-up window. (Figure 2) The pop-up will display all documents that that employee is currently assigned as an approver on. Enter in the name of the employee who will replace the existing approver in the **New Approver** field. (Yellow box, Figure 2)

Next, select the **Replacement Method**. You can choose to replace the approver on this document only, all published documents, or all documents. (Teal box, Figure 2) When finished, select the **Save Changes** button. (Teal box, Figure 3)

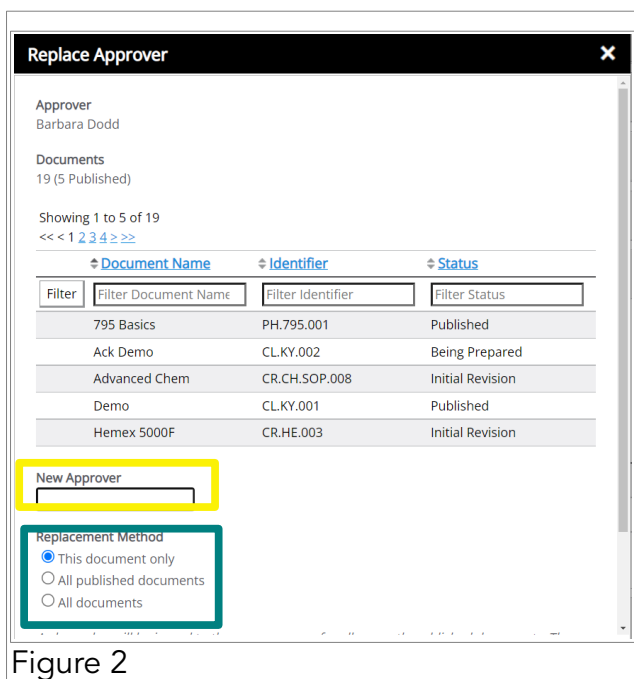


Figure 2

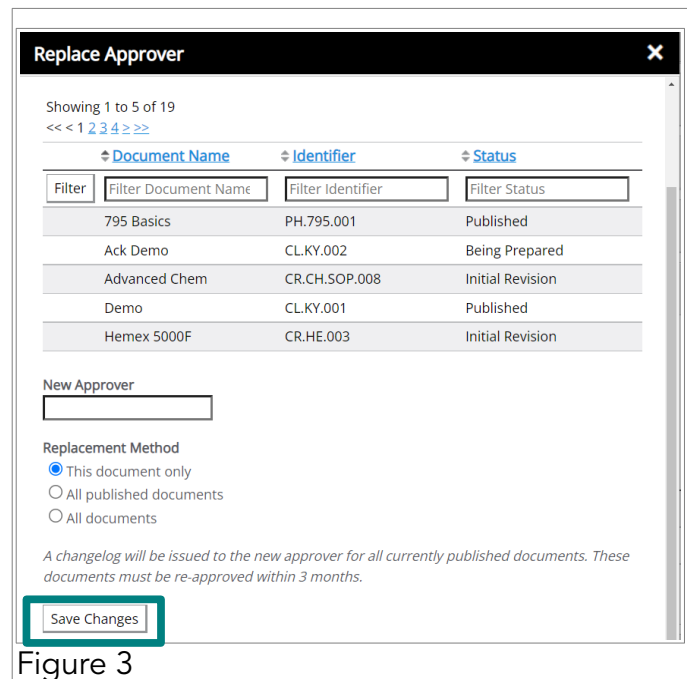


Figure 3

Resources

This concludes the User Guide for **Approvers**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Document Control module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

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