Table of Contents

Approvers Documentation (Printable)

CMS Documentation for Approvers

If you are responsible for reviewing submissions for edits on the website the following documentation will be helpful for you.

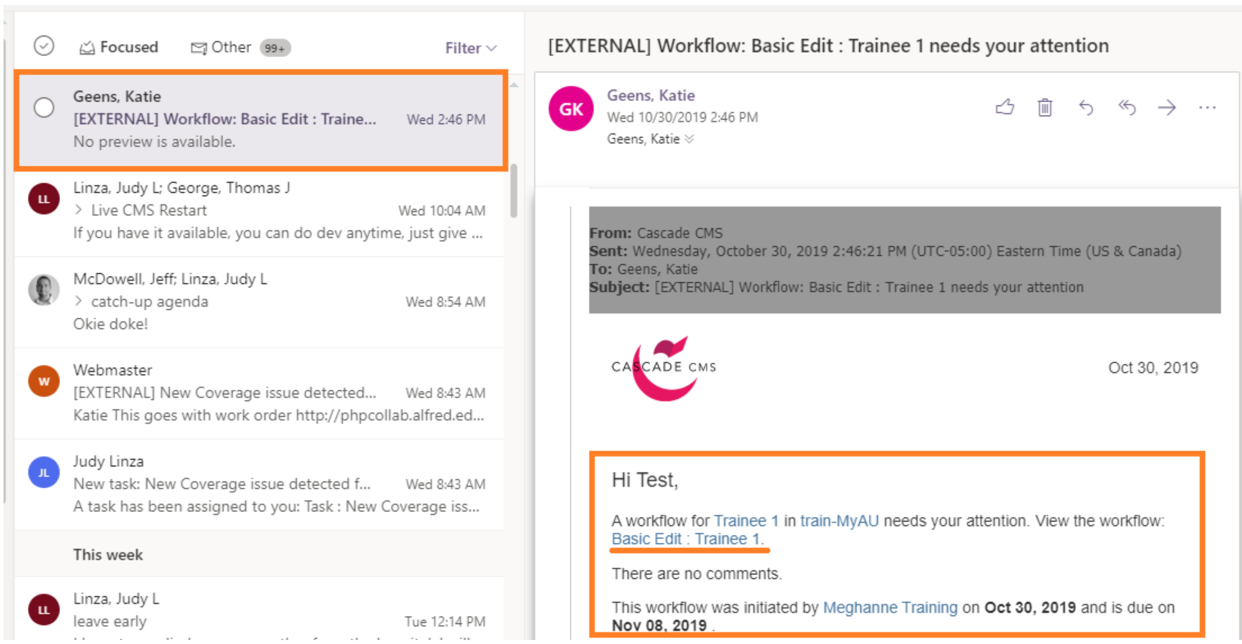
- Reviewing Workflows or "Draft Submissions"
- Comparing Working Copy (Draft submission) to Current Webpage
- Manually Publishing Out Your Content

Reviewing Workflows

If you are an approver of site content, you will receive drafts from site content editors for you to review before any changes are published out to the live public website.

How will I know when I need to review a draft?

You will receive an email notification when someone has submitted a draft for you to review.



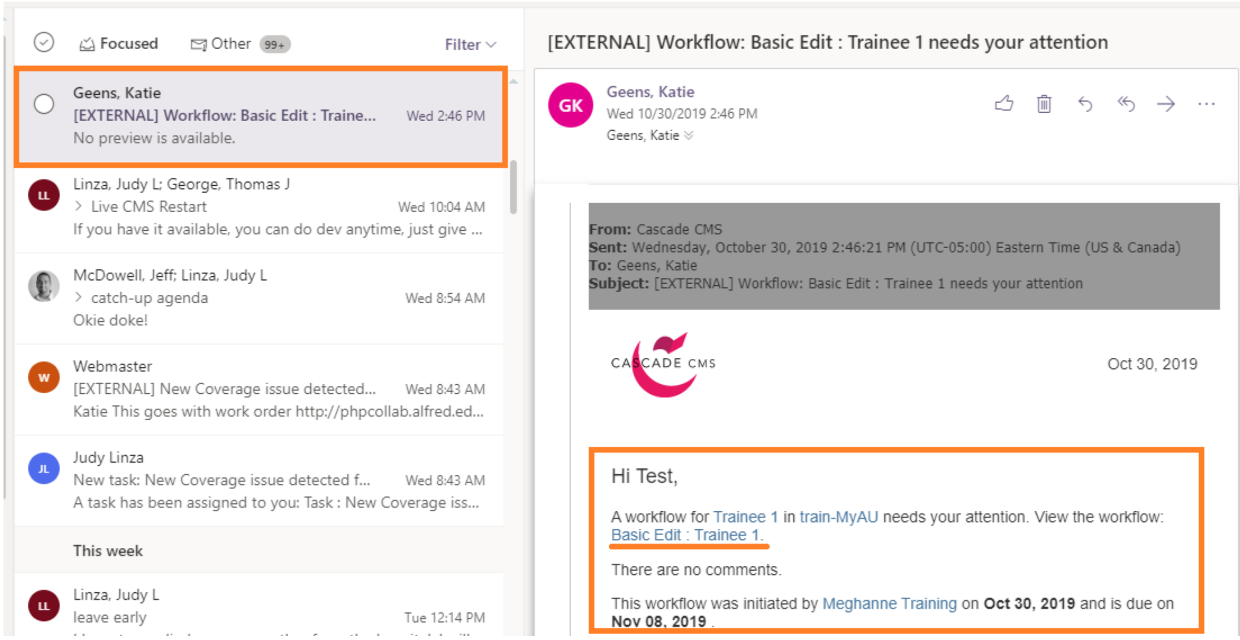
Getting to Workflows

There's a couple ways to get to your workflows. It's up to you, which way you find easiest.

Option 1 - From Email Notification

As soon as someone sends a draft for review, you should receive an email notification.

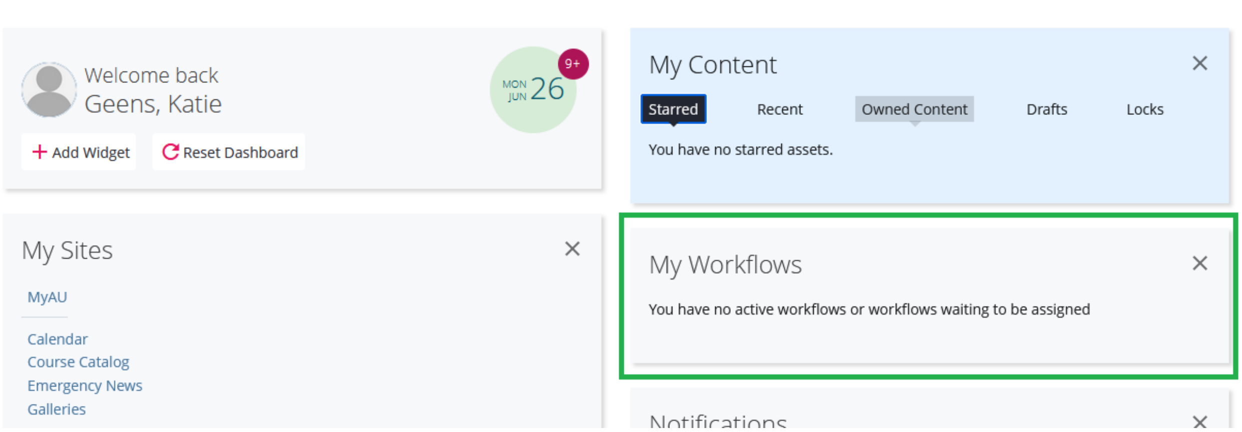
This email will tell you who sent the draft, any comments they submitted about what they changed along with a link to the workflow screen. Click the Workflow link to start to view the changes and act on the draft.



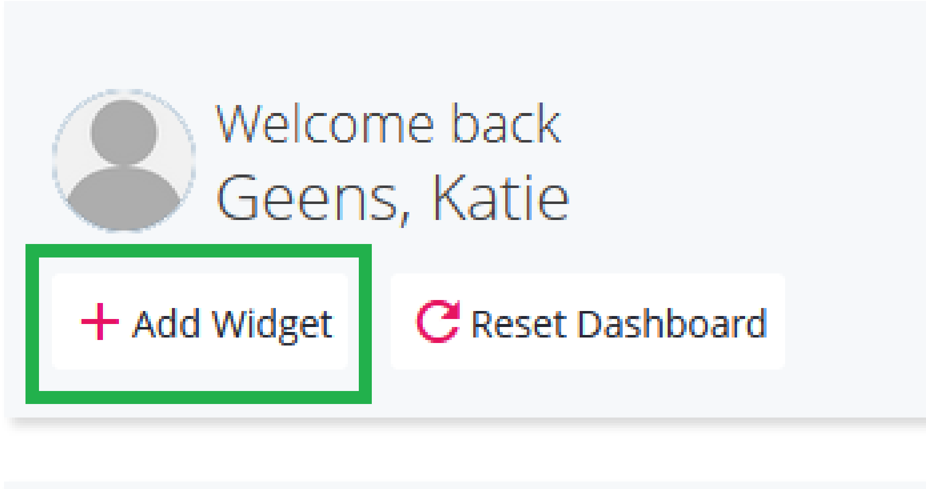
Option 2 - From Your Dashboard

When you log into Cascade, your dashboard screen will let you know you have some things to take care of.

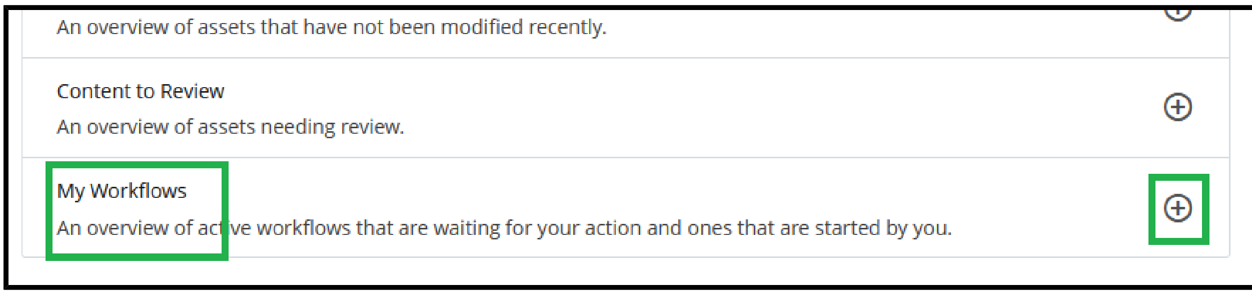
1. Click the Cascade logo in the top left corner to go to your dashboard, or login to https://cascade.alfred.edu
2. Locate the **My Workflows** Widget,
   You can drag & drop to move widgets on your dashboard to what works best for you.



- If you don't see a My Workflows section on your dashboard:
  - Click **Add Widget**



Scroll down and find the **My Workflows** option, Click the **Plus Icon**



3. Select which workflow you would like to review the draft and act on.

Option 3 - My Content

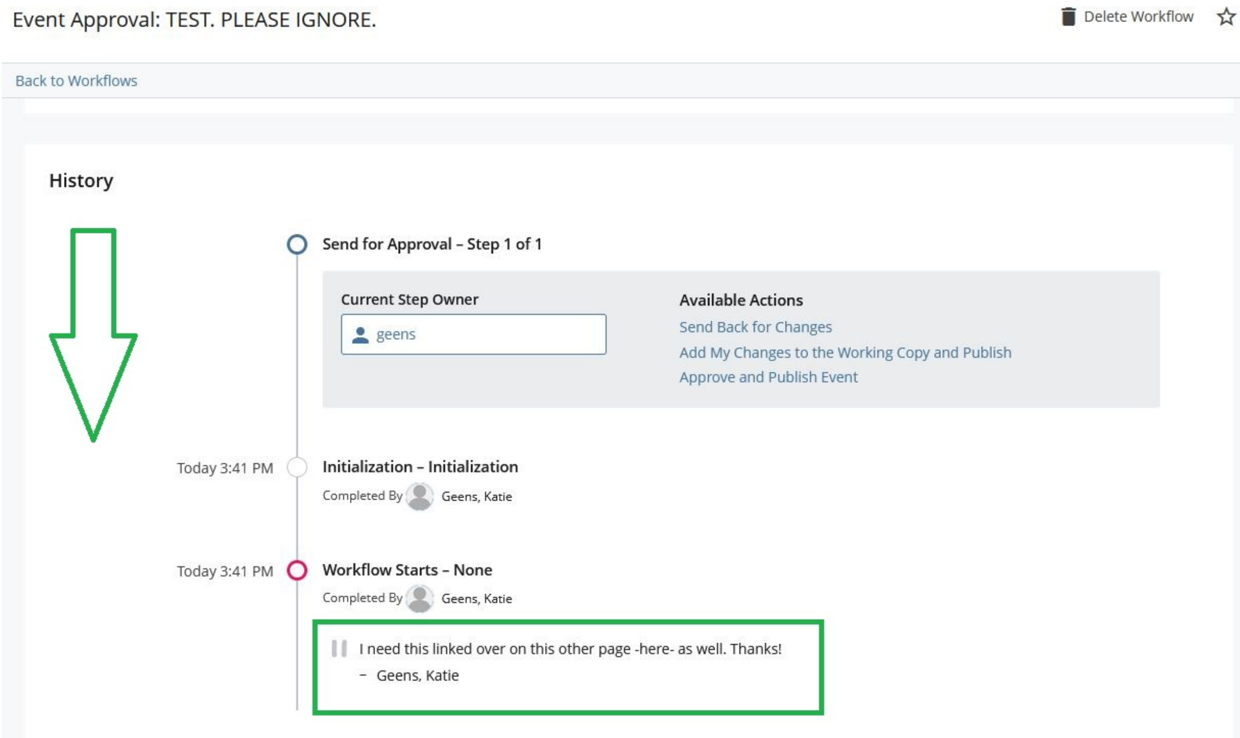
1. Click on **My Content** in the Top Menu, right-hand side.

   If you're viewing on smaller screens, click the hamburger menu  *in the top right corner first.*
2. You will see a Tab for **Workflows**
3. Click workflows to view all workflows waiting for your attention.

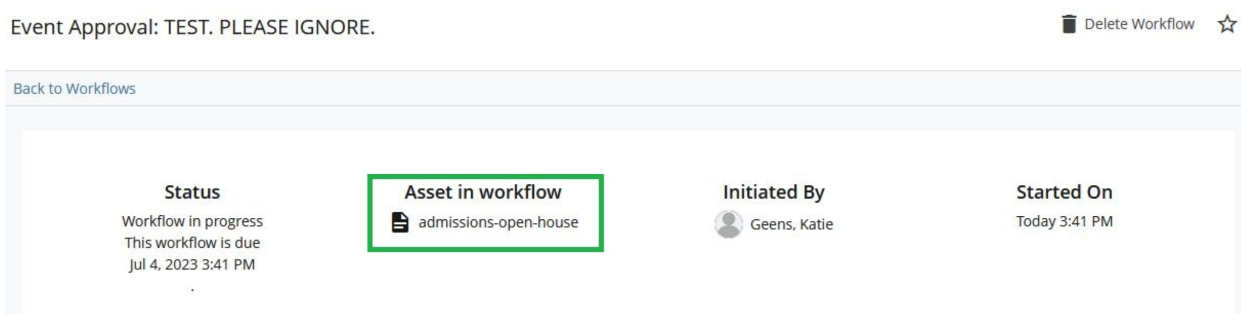
Viewing Draft

Once you select a workflow to view, you will be brought to the Workflow Screen.

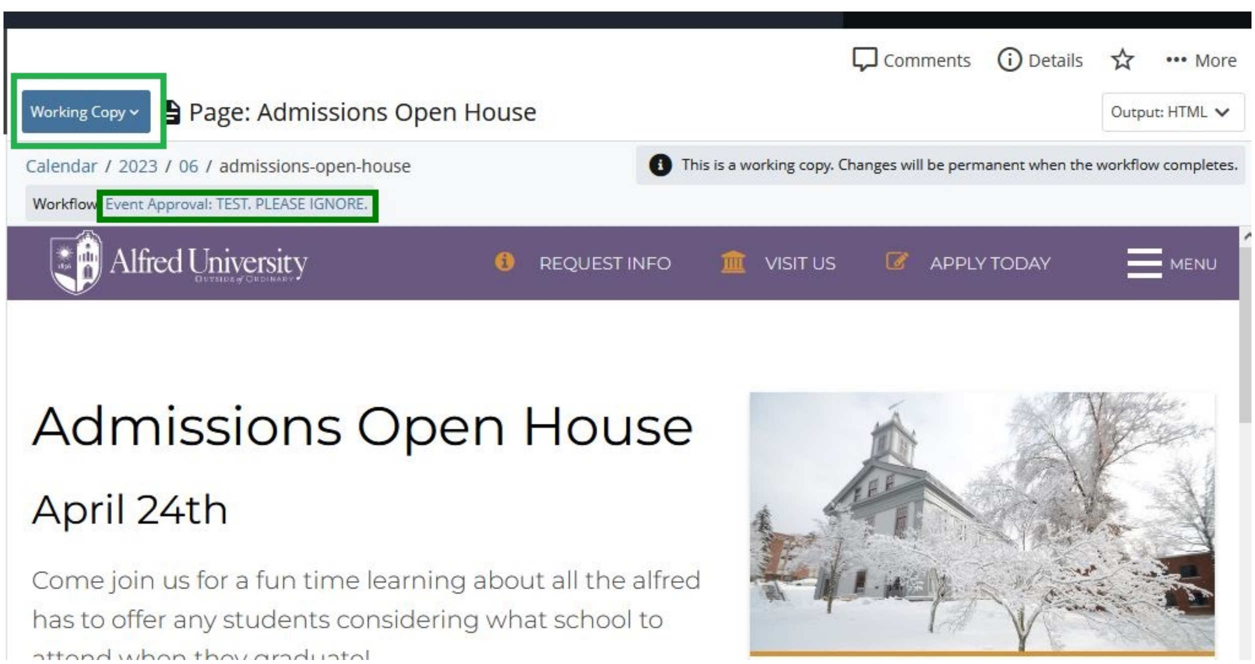
1. **Review any comments** the person left for you (if they left any).



2. **Click on the Asset in Workflow** to view the draft they submitted.



3. When done reviewing the changes & you know what action to take with it, click the link back to **Workflow:**

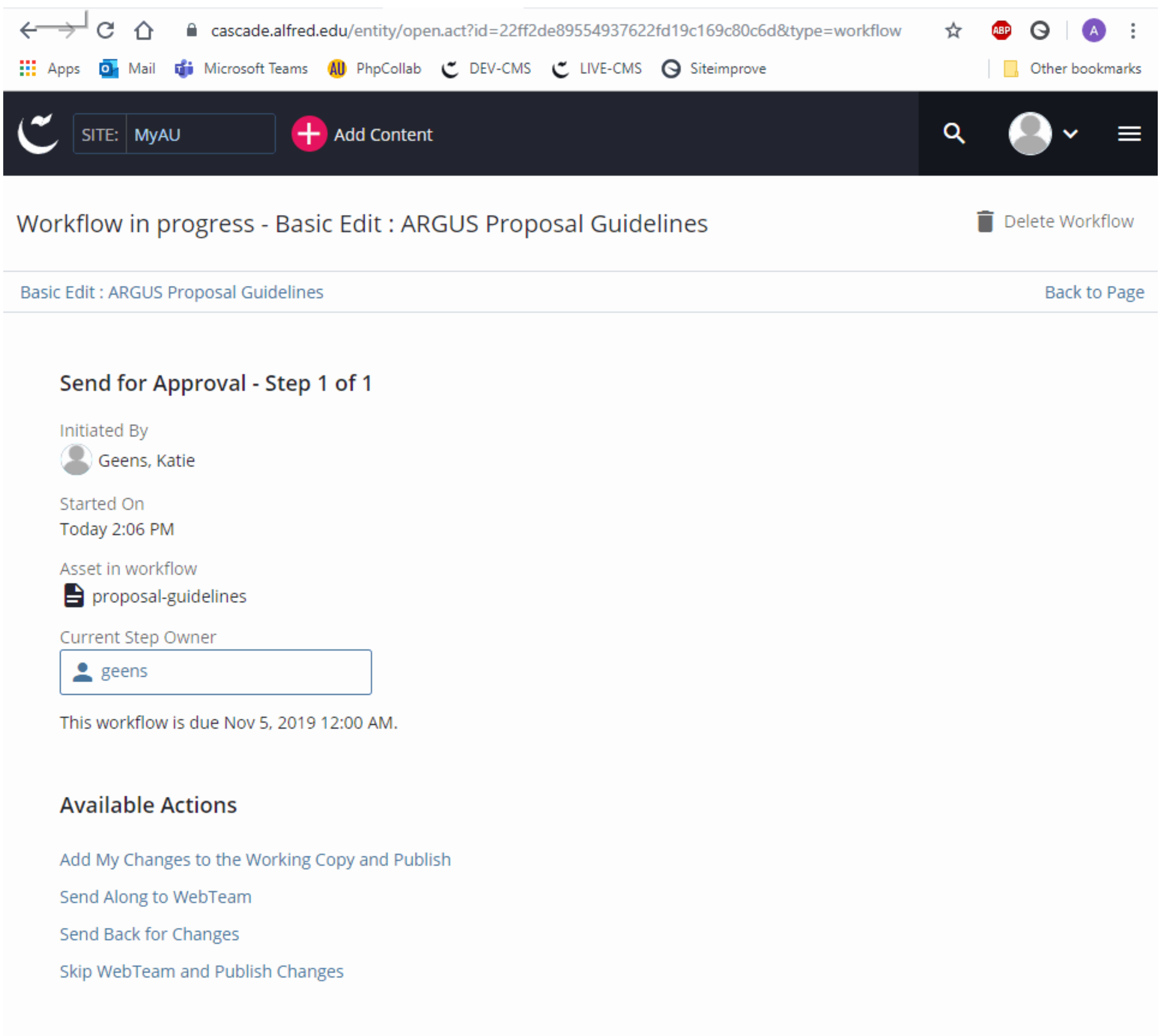


Comparing Draft to the Current Version

Having trouble evaluating if the changes they made are good? Here's a couple ways you can compare their changes to the current version of the page on the website.

Toggle Current vs. Working Copy

1. From the Workflow screen, Click the **Asset in Workflow** if you haven't already
2. By default, when you view the asset in workflow it will show you the draft with new changes made to the page. Towards the top left, you should see a **dropdown** that says **Working Copy** or Current
3. Toggle this dropdown back and forth between **Working Copy (Draft)** and **Current** to quickly scan and compare changes before approving or acting on the draft.



Still need help comparing?

Maybe the draft has ALOT of changes, or the page is really long and you're not sure where all the changes are. The CMS can help you out.

When you use the compare with current tool in the CMS, it will go through and highlight any specific changes that were made for you to quickly review.

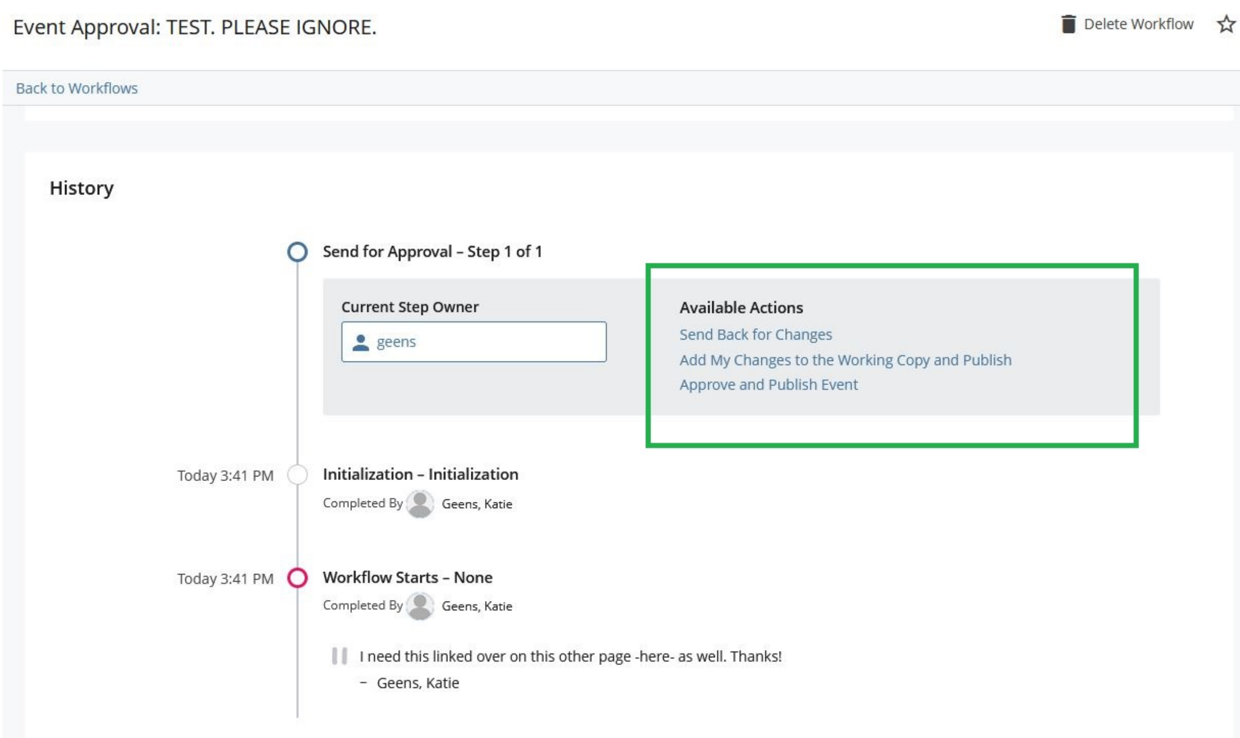
See How to Use Compare with Current Tool

Acting on the Draft

Do you want to approve the draft and publish the changes to the public website? Do you need to send the draft back to the person making changes to make more adjustments?

On the Workflow Screen:

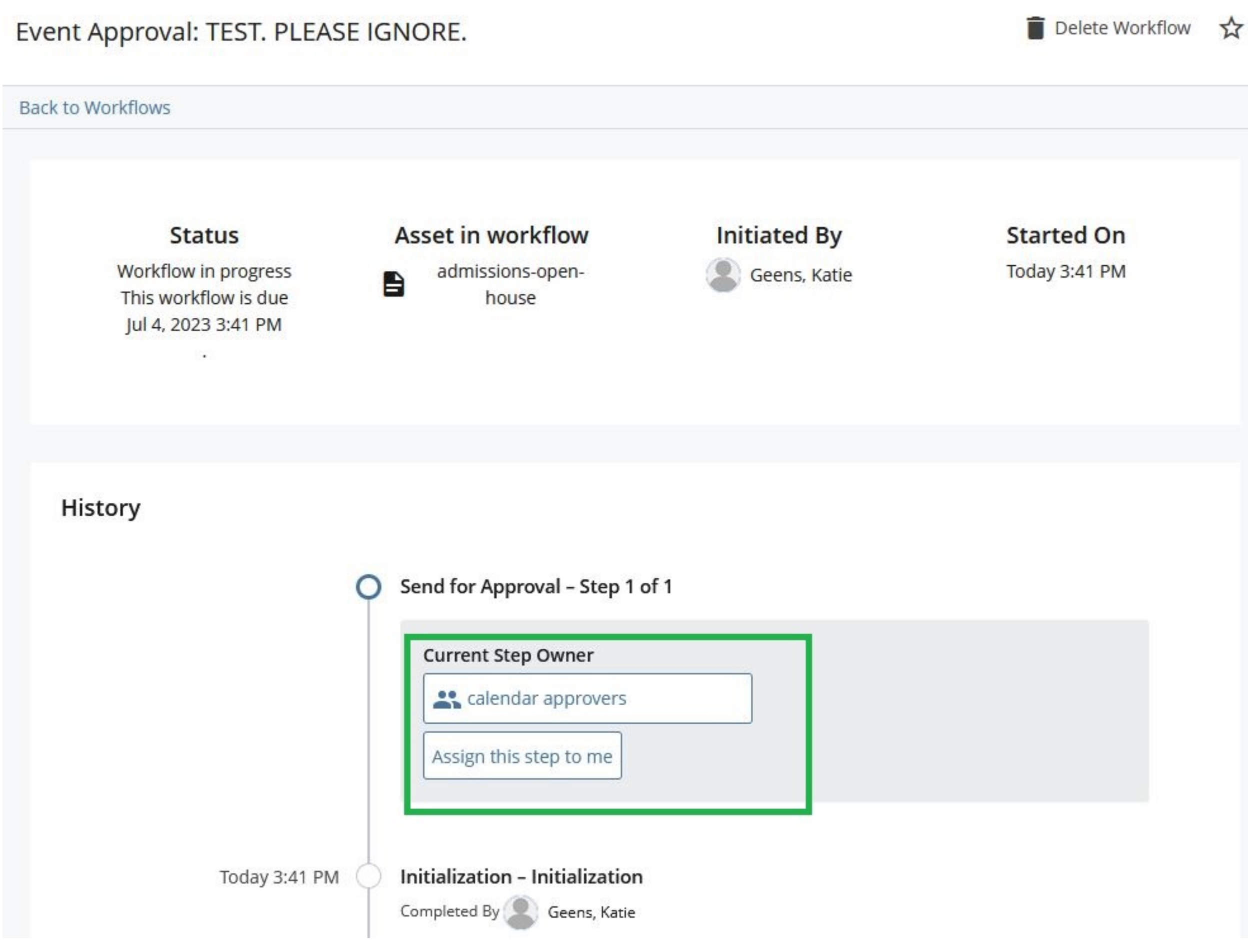
You should see an **Available Actions** section near the Current Step Owner.



If you don't see any available actions, make sure the Current Step Owner is set to your username. If it isn't click the user box and browse/search for your username or 'Assign to Me'.

Why might i need to select my username?
Some workflows may be sent to a group of people, so they all get notified about a draft. This is so all approvers are in the same loop, and if one approver is out another one can take care of approving drafts while the other is out.

If a workflow is sent to a group of users, then one of the users in that group needs to adjust the Current Step Owner to themselves before taking any action.



Available Actions

These are the steps you can take on this draft. After reviewing the draft you might want to send it back to the sender for further changes. Or you may think their changes look good and want to approve and publish them out to the live website.

While Available Actions may change depending on what type of content you are approving, most actions will be the following:

Add My Changes to the Working Copy and Publish

This option is best if you have just some minor adjustment(s) you want to make to the submitted changes and then publish all changes to the live website. Maybe you just have one thing you want to format differently but don't want to send the draft back to the sender to do. If you think you can make the change easily and don't want to bother the sender you can use this option to make your changes and publish quickly.

Send to Web Team

This option is best if the sender had trouble formatting something, and you're not sure how to either. You can send it to the web team to review for best guidance. This option is also available if you run into any errors or need any guidance from the web team.

Send Back for Changes

This option is best for if you want to send the draft back to the sender to make more changes before publishing to the live website. You will be asked for a comment before the draft is sent back so be sure to give details on what the sender needs to do.

Approve and Publish Changes

This is what you will probably use the most. If you've reviewed the changes and they look good, use this option to approve the changes and publish them to the live website.

Compare Workflow Draft to Current

Not sure what was changed in the draft submitted? Comparing the draft with the current version allows you to see highlighted changes so you don't have to hunt for exactly what changed.

Step 1

From the **Workflow Screen**, Click the **asset in workflow** to view the draft.

Step 2

Click the **More...** in Toolbar **>> Compare with current**

You should see any changes highlighted.

What Do Different Highlighted Colors Mean?

Green

Content that was added.

Red (with strike-through)

Content that was removed.

Purple

Content was formatted differently. (Bold, Italic, etc.)

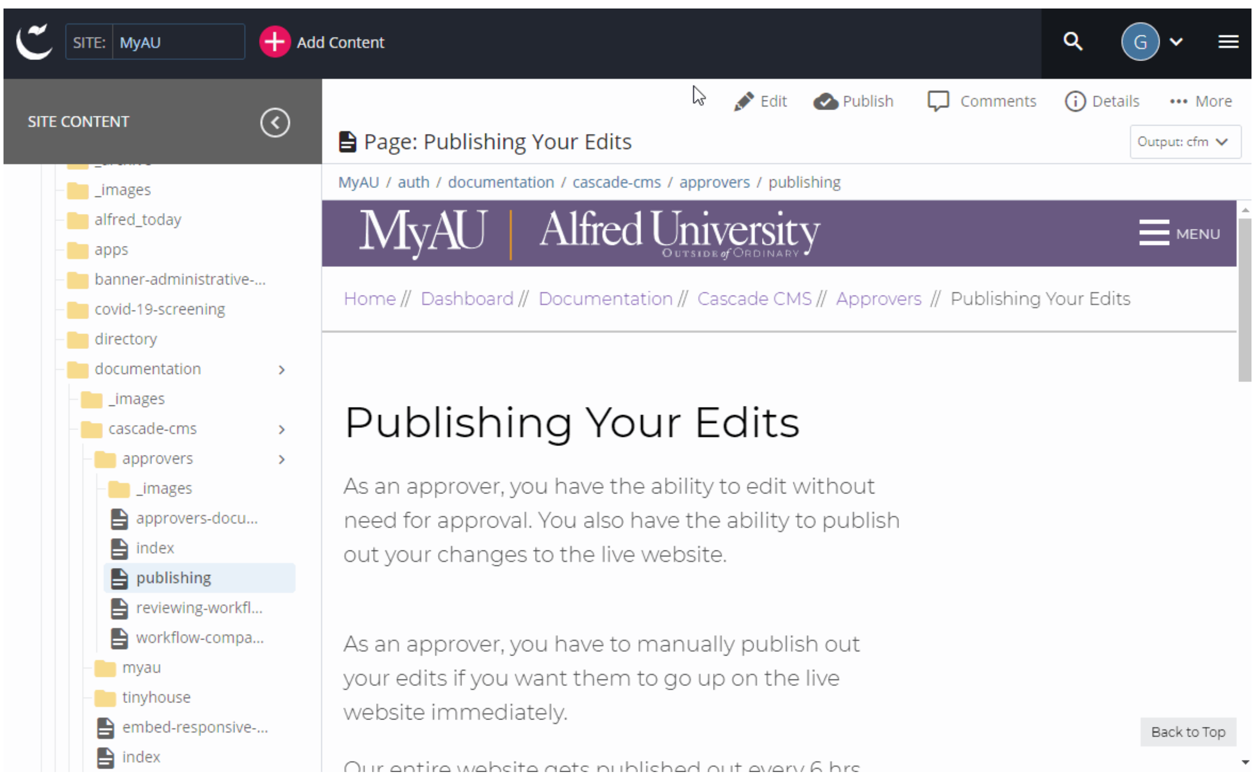
Publishing Your Edits

As an approver, you have the ability to edit without need for approval. You also have the ability to publish out your changes to the live website.

As an approver, you have to manually publish out your edits if you want them to go up on the live website immediately.

Our entire website gets published out every 6 hrs, usually around noon and 6pm. But if you are making edits and need them on the live website immediately, or in between those times then you can easily manually publish your content.

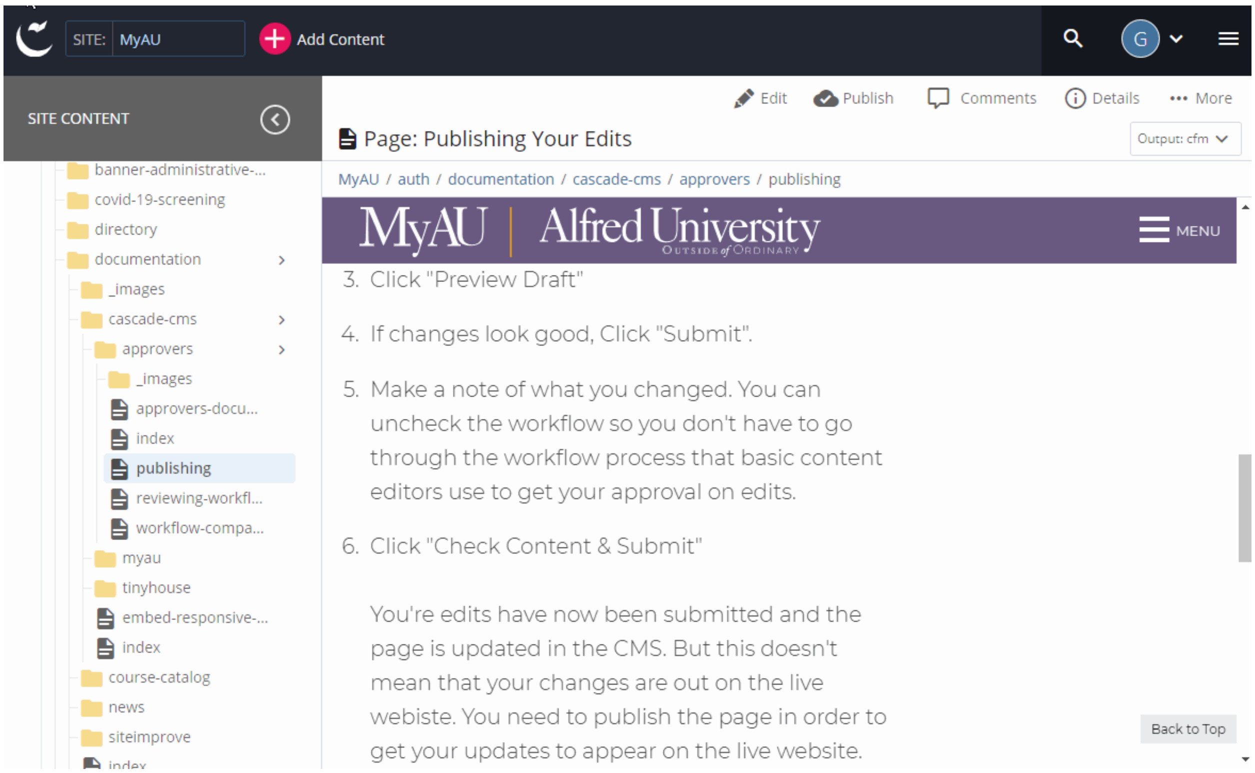
1. Make Sure You Submit Your Edits



1. Click **"Edit"** button in the toolbar
2. Make your changes

3. Click **"Preview Draft"**
4. If changes look good, Click **"Submit".**
5. Make a note of what you changed. You can **un-check the workflow** so you don't have to go through the workflow process that basic content editors use to get your approval on edits.
6. Click **"Check Content & Submit"**
   You're edits have now been submitted and the page is updated in the CMS. **But** this doesn't mean that your changes are out on the live website. You need to publish the page in order to get your updates to appear on the live website.

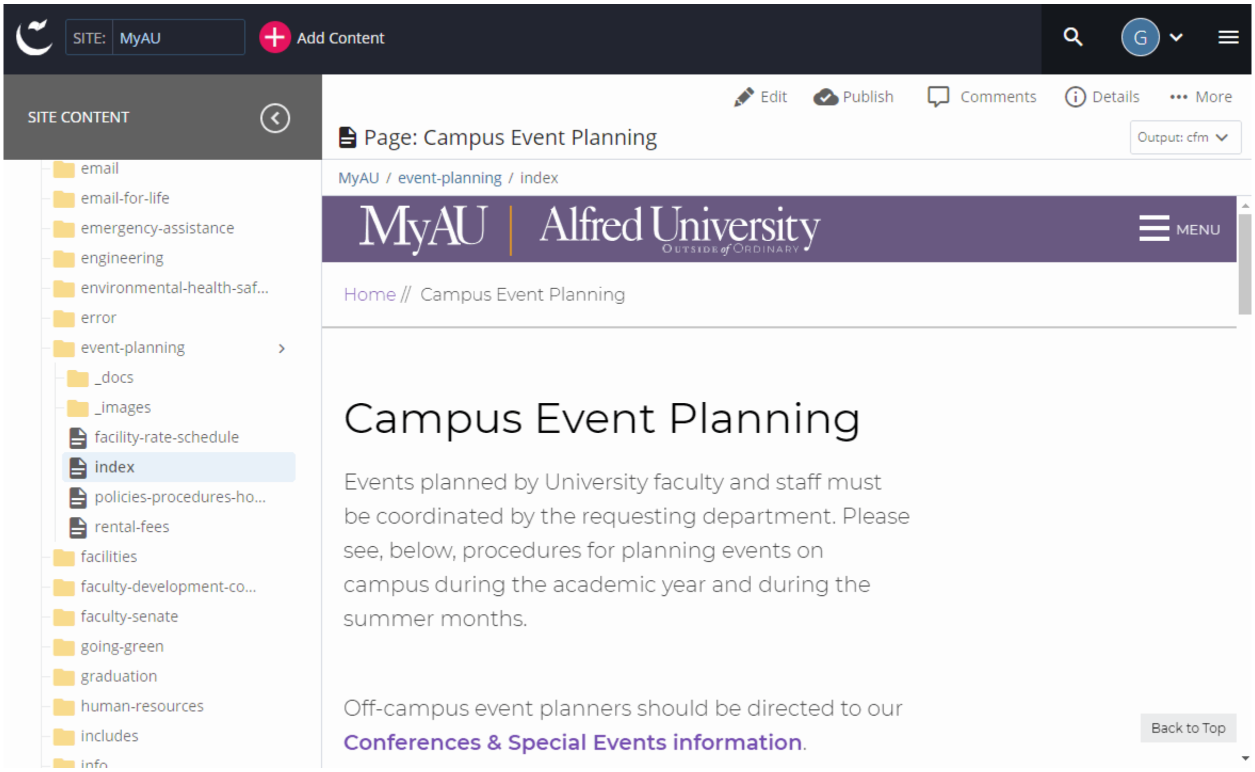
2. Publish Out Your Edits



1. Click the **"Publish"** button in the toolbar.
2. Leave all the settings alone on the popup window and just Click **"Publish".**
   You're edits will be added to a queue, much like a print queue to publish out. It may take a moment, but generally publishes out within a few seconds.

Quickly View the Live WebPage

If you want to verify that your changes are up on the live website and look good do the following:



1. Click the **"...More"** button in the toolbar.
2. Click the **"Live"** option at the very bottom of this menu.
   This will quickly take you directly to the live page on the website in a new tab. If you just published your changes and you don't see them right away, you may need to wait a few seconds and just refresh the live webpage.