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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](#)

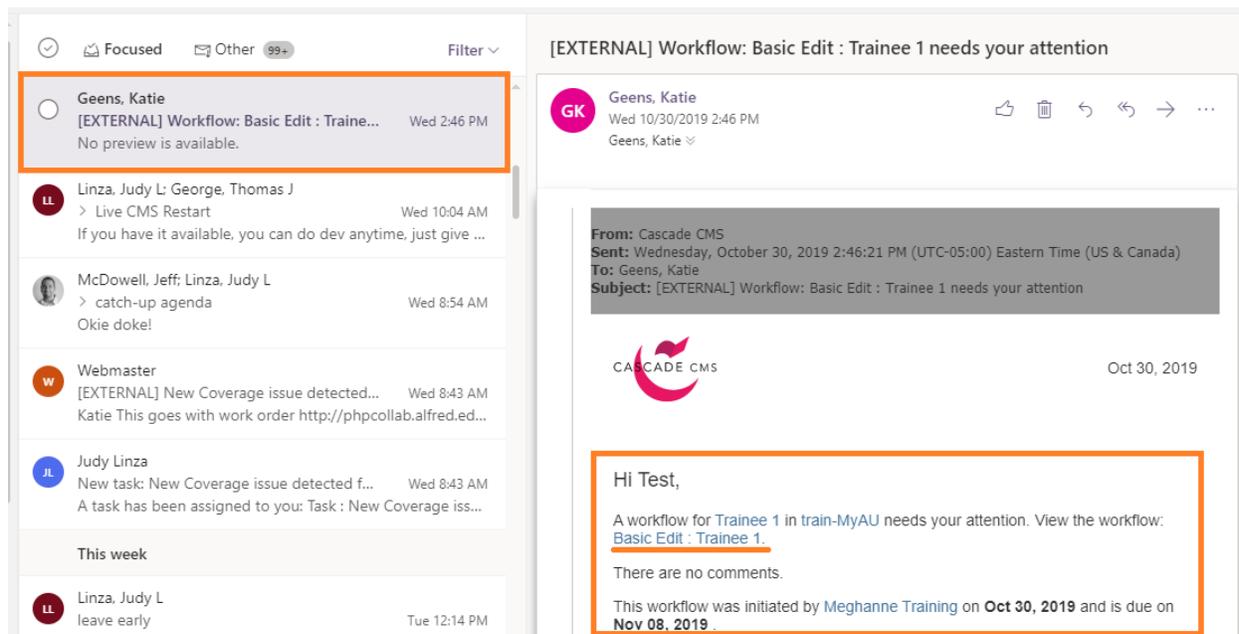
- [Manually Publishing Out Your Content](#)

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.

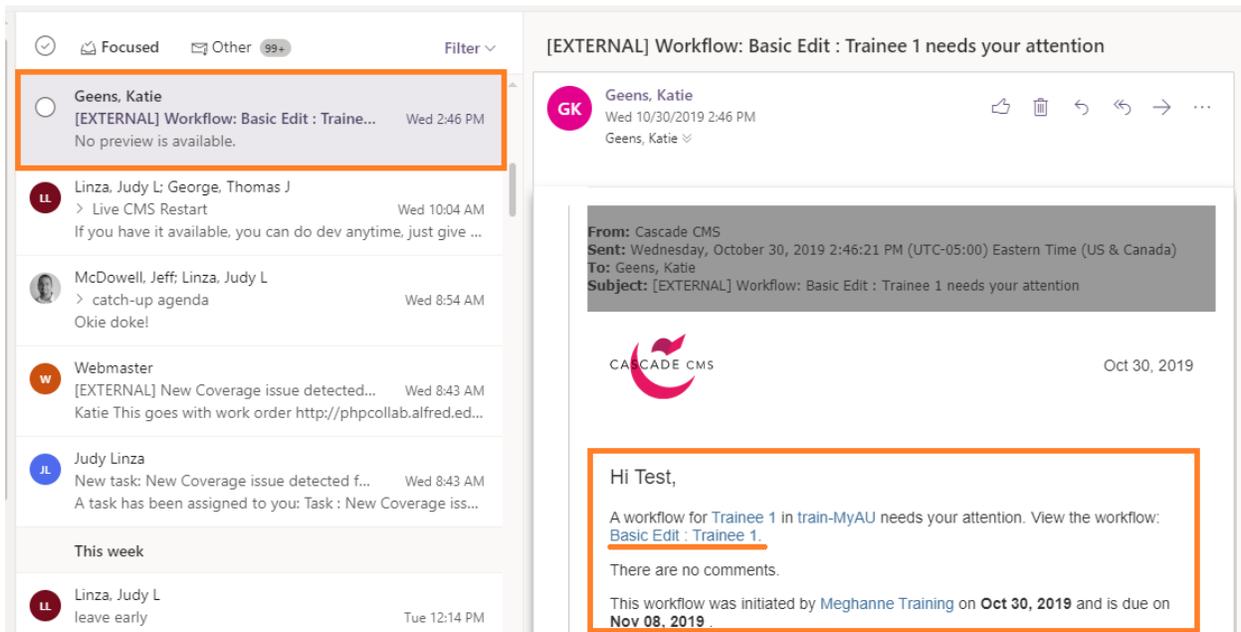


Getting to Workflows

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

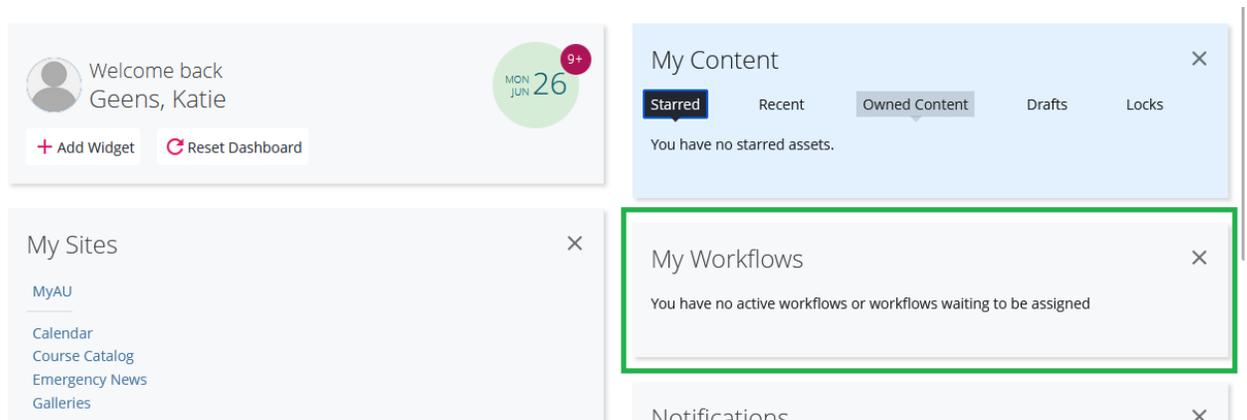
As soon as someone sends a draft for review, you should receive an email notification. This email will tell you who sent the draft, any comments they submitted about what they changed along with a link to the workflow screen. Click the Workflow link to start to view the changes and act on the draft.



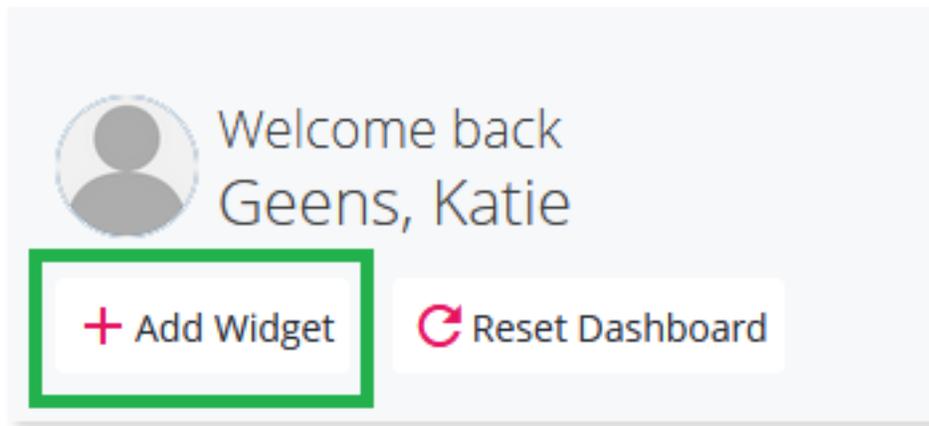
Option 2 - From Your Dashboard

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

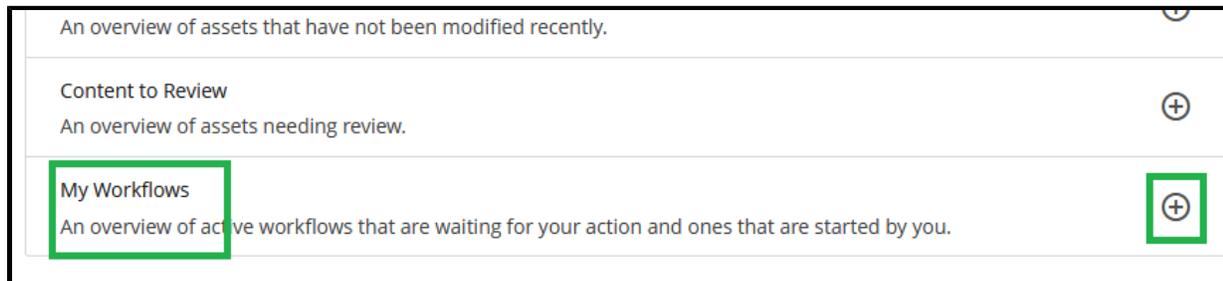
1. Click the Cascade logo in the top left corner to go to your dashboard, or login to <https://cascade.alfred.edu>
2. Locate the **My Workflows** Widget,
You can drag & drop to move widgets on your dashboard to what works best for you.



- 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).

Back to Workflows

History



- Send for Approval - Step 1 of 1**
 - Current Step Owner: geens
 - Available Actions:
 - Send Back for Changes
 - Add My Changes to the Working Copy and Publish
 - Approve and Publish Event
- Today 3:41 PM **Initialization - Initialization**
 Completed By: Geens, Katie
- Today 3:41 PM **Workflow Starts - None**
 Completed By: Geens, Katie

|| I need this linked over on this other page -here- as well. Thanks!
- Geens, Katie

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

Back to Workflows

Status Workflow in progress This workflow is due Jul 4, 2023 3:41 PM	Asset in workflow admissions-open-house	Initiated By Geens, Katie	Started On Today 3:41 PM
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3. When done reviewing the changes & you know what action to take with it, click the link back to **Workflow**:

Working Copy ▾ Page: Admissions Open House Output: HTML ▾

Calendar / 2023 / 06 / admissions-open-house This is a working copy. Changes will be permanent when the workflow completes.

Workflow Event Approval: TEST. PLEASE IGNORE.

Alfred University REQUEST INFO VISIT US APPLY TODAY MENU

Admissions Open House

April 24th

Come join us for a fun time learning about all the alfred has to offer any students considering what school to attend when they graduate!



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.

The screenshot shows a web browser window with the URL `cascade.alfred.edu/entity/open.act?id=22ff2de89554937622fd19c169c80c6d&type=workflow`. The browser's address bar and tabs are visible. Below the browser, there is a dark navigation bar with a search icon, a user profile icon, and a menu icon. The main content area displays the workflow details for 'ARGUS Proposal Guidelines'. The workflow is in progress and is due on Nov 5, 2019, at 12:00 AM. The current step is 'Send for Approval - Step 1 of 1', initiated by Katie Geens. The asset in the workflow is 'proposal-guidelines'. The current step owner is 'geens'. Below the workflow details, there are several available actions: 'Add My Changes to the Working Copy and Publish', 'Send Along to WebTeam', 'Send Back for Changes', and 'Skip WebTeam and Publish Changes'.

Workflow in progress - Basic Edit : ARGUS Proposal Guidelines [Delete Workflow](#)

Basic Edit : ARGUS Proposal Guidelines [Back to Page](#)

Send for Approval - Step 1 of 1

Initiated By
 Geens, Katie

Started On
Today 2:06 PM

Asset in workflow
 proposal-guidelines

Current Step Owner

This workflow is due Nov 5, 2019 12:00 AM.

Available Actions

- [Add My Changes to the Working Copy and Publish](#)
- [Send Along to WebTeam](#)
- [Send Back for Changes](#)
- [Skip WebTeam and Publish Changes](#)

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.

Event Approval: TEST. PLEASE IGNORE. Delete Workflow ☆

[Back to Workflows](#)

History

- Send for Approval – Step 1 of 1**
 - Current Step Owner**
 - Available Actions**
 - Send Back for Changes
 - Add My Changes to the Working Copy and Publish
 - Approve and Publish Event
- Today 3:41 PM Initialization – Initialization**
Completed By Geens, Katie
- Today 3:41 PM Workflow Starts – None**
Completed By Geens, Katie
 - I need this linked over on this other page -here- as well. Thanks!
- Geens, Katie

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?

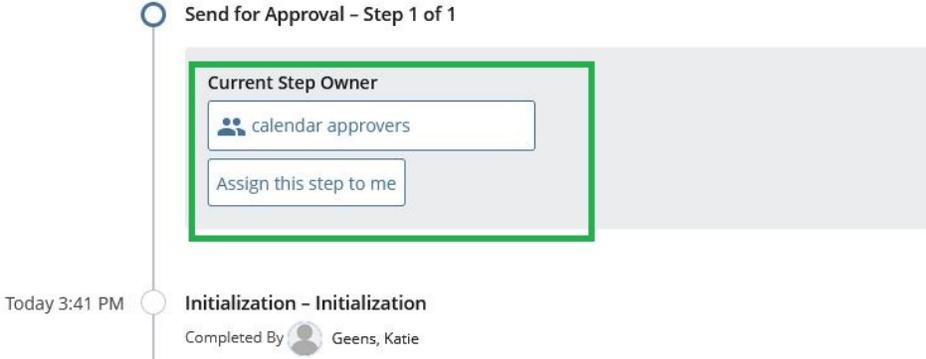
Some workflows may be sent to a group of people, so they all get notified about a draft. This is so all approvers are in the same loop, and if one approver is out another one can take care of approving drafts while the other is out.

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.

[Back to Workflows](#)

Status	Asset in workflow	Initiated By	Started On
Workflow in progress This workflow is due Jul 4, 2023 3:41 PM	 admissions-open-house	 Geens, Katie	Today 3:41 PM

History



The history timeline shows two steps:

- Send for Approval - Step 1 of 1**: This step is currently active. A green box highlights the 'Current Step Owner' section, which includes a dropdown menu with 'calendar approvers' selected and an 'Assign this step to me' button.
- Initialization - Initialization**: Completed by Geens, Katie at Today 3:41 PM.

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.

Workflow in progress - Faculty Profile Approval: Mallory Szymanski Delete Workflow

Faculty Profile Approval: Mallory Szymanski Back to Page

Send for Approval - Step 1 of 1

Initiated By 
 Szymanski, Mallory

Started On
Today 12:15 PM

Asset in workflow
 szymanski-mallory

Current Step Owner
 www.alfred.edu faculty-profile-...

This workflow is due Aug 19, 2019 12:00 AM.

[Assign this step to me](#)

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.)

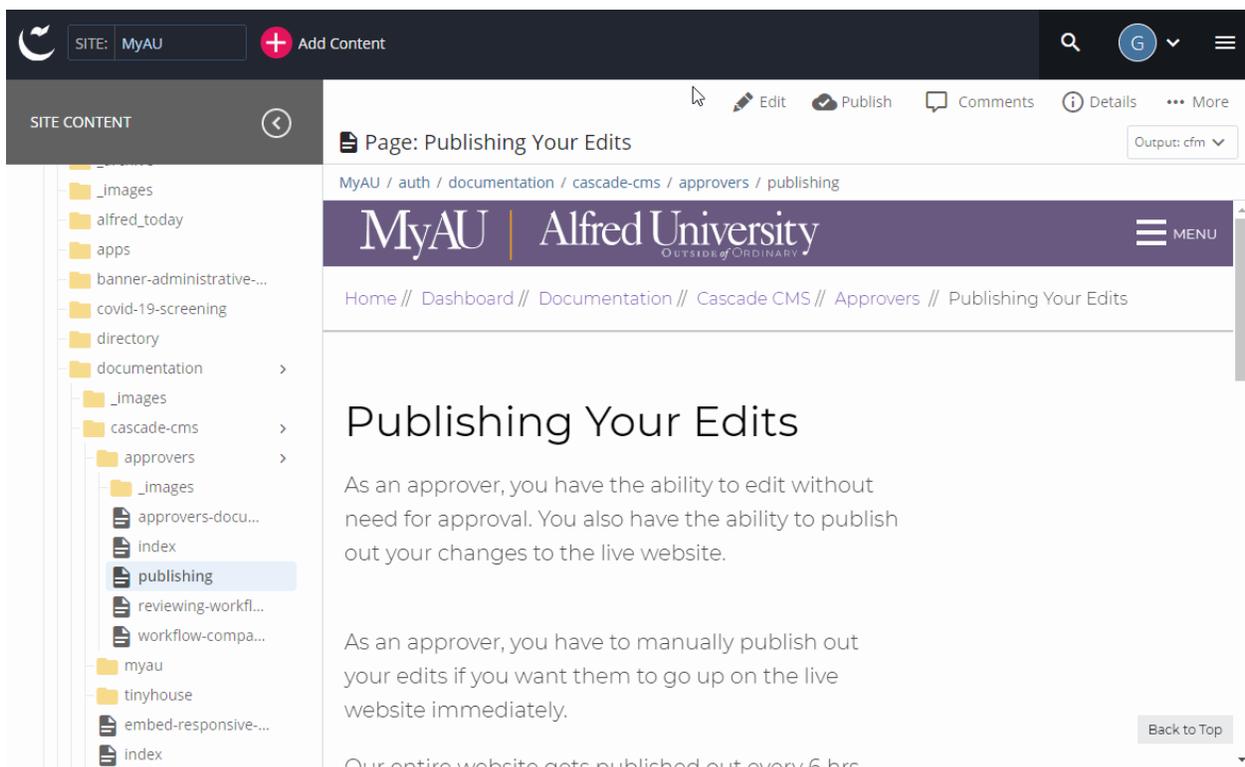
Publishing Your Edits

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



The screenshot shows the MyAU CMS interface. At the top, there's a dark navigation bar with a search icon, a user profile icon, and a menu icon. Below that, a toolbar contains 'Edit', 'Publish', 'Comments', 'Details', and 'More' buttons. The main content area is titled 'Page: Publishing Your Edits' and shows a breadcrumb trail: 'MyAU / auth / documentation / cascade-cms / approvers / publishing'. The page content includes the MyAU logo and the text: '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.' and 'As an approver, you have to manually publish out your edits if you want them to go up on the live website immediately.' A 'Back to Top' button is visible at the bottom right of the page content.

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

The screenshot shows the MyAU CMS interface. The top navigation bar includes 'SITE: MyAU', 'Add Content', and search options. The left sidebar shows a file tree with 'publishing' selected. The main content area displays the following steps:

3. Click "Preview Draft"
4. If changes look good, Click "Submit".
5. Make a note of what you changed. You can uncheck 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"

Below the steps, a paragraph reads: "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." A "Back to Top" button is located at the bottom right of the content area.

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:

The screenshot shows a web content management system interface. At the top, there is a navigation bar with 'SITE: MyAU', 'Add Content', search, and user profile. Below this is a 'SITE CONTENT' sidebar with a tree view of folders and files. The 'event-planning / index' folder is selected. The main content area displays the page title 'Page: Campus Event Planning', the breadcrumb 'MyAU / event-planning / index', and the MyAU logo. The page content includes the heading 'Campus Event Planning', a paragraph about event planning procedures, and a link to 'Conferences & Special Events information'. A 'Back to Top' button is visible at the bottom right of the content area.

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.