

There are 2 methods to complete this task:

1. [From Skyline or Main St. View \(if My Pending Approvals is configured to display\).](#)
2. [From the Documents tab of the matter.](#)

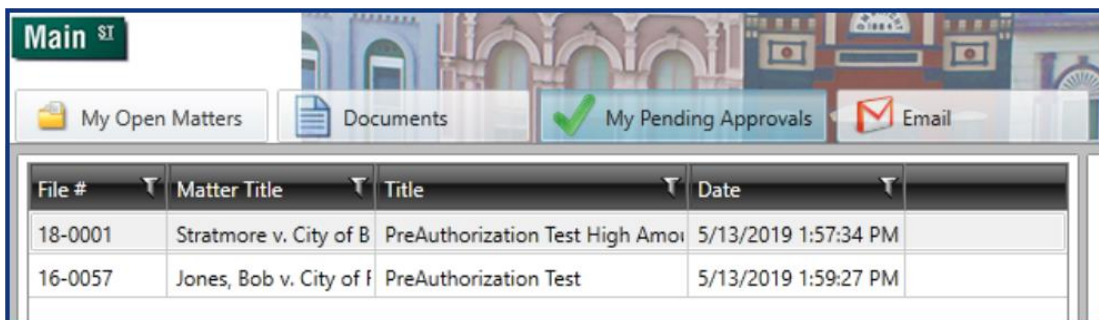
Method 1. From Skyline or Main St. View.

In **Skyline** view, if **My Pending Approvals** has been configured to display, a list of pending approvals will be shown.



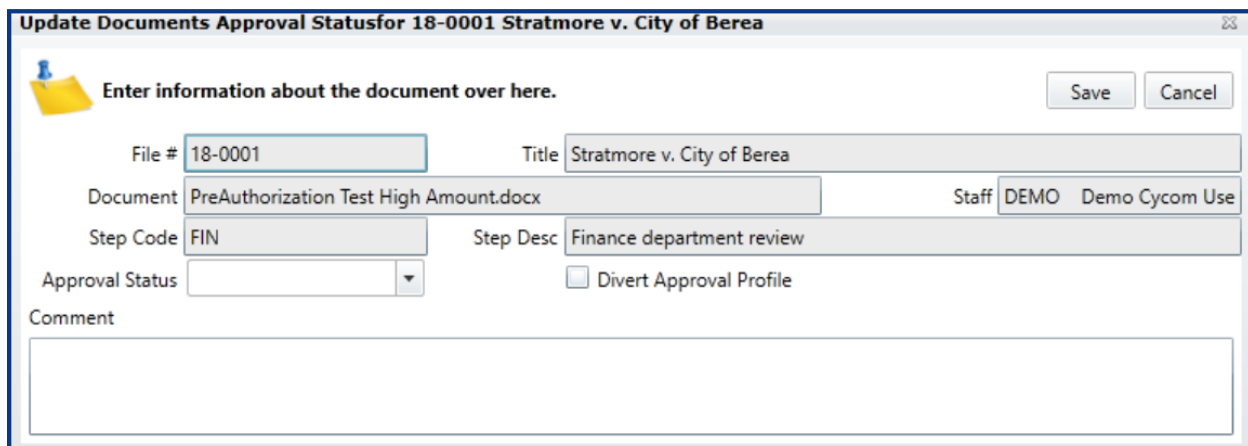
File #	Matter Title	Title	Date
18-0001	Stratmore v. City of B	PreAuthorization Test High Amo	5/13/2019 1:57:34 PM
16-0057	Jones, Bob v. City of f	PreAuthorization Test	5/13/2019 1:59:27 PM

In **Main St.** view, the list of pending approvals displays differently.



File #	Matter Title	Title	Date
18-0001	Stratmore v. City of B	PreAuthorization Test High Amo	5/13/2019 1:57:34 PM
16-0057	Jones, Bob v. City of f	PreAuthorization Test	5/13/2019 1:59:27 PM

In either view, double-click a pending approval to open the **Documents Approval** window.



Update Documents Approval Status for 18-0001 Stratmore v. City of Berea

Enter information about the document over here. Save Cancel

File # Title

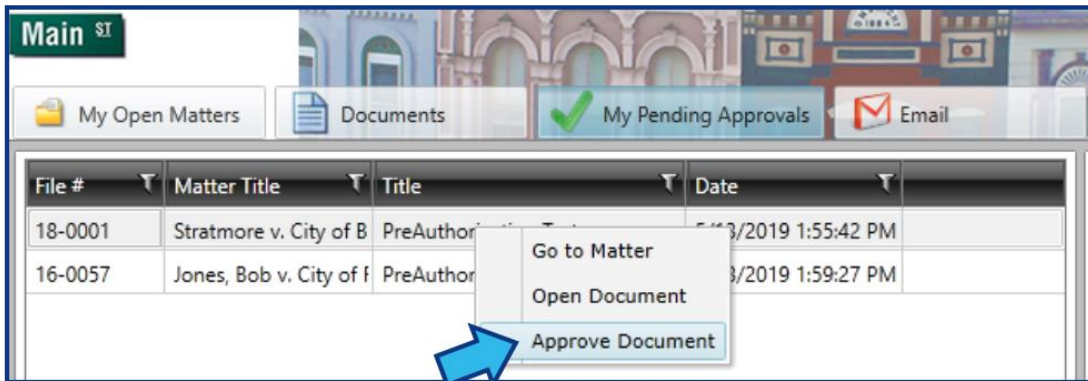
Document Staff

Step Code Step Desc

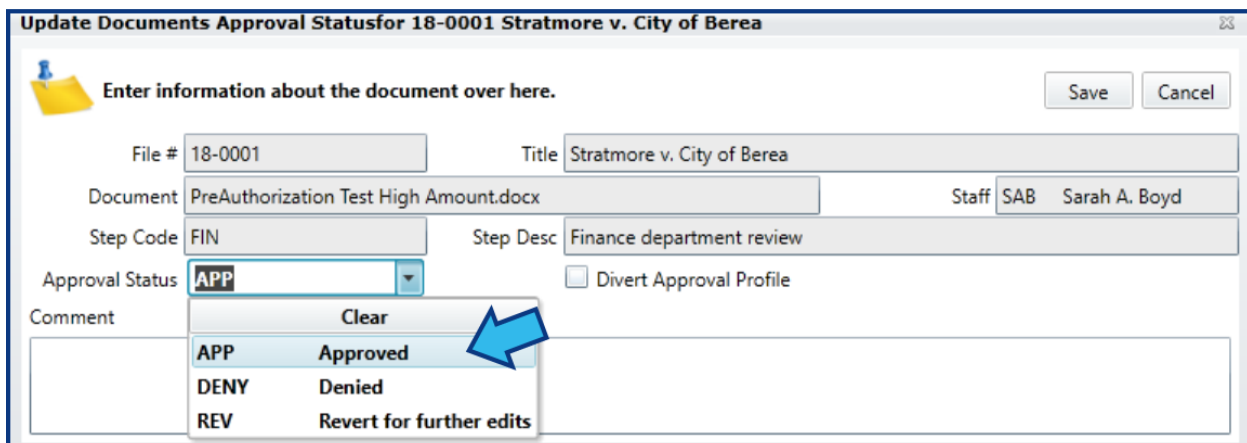
Approval Status Divert Approval Profile

Comment

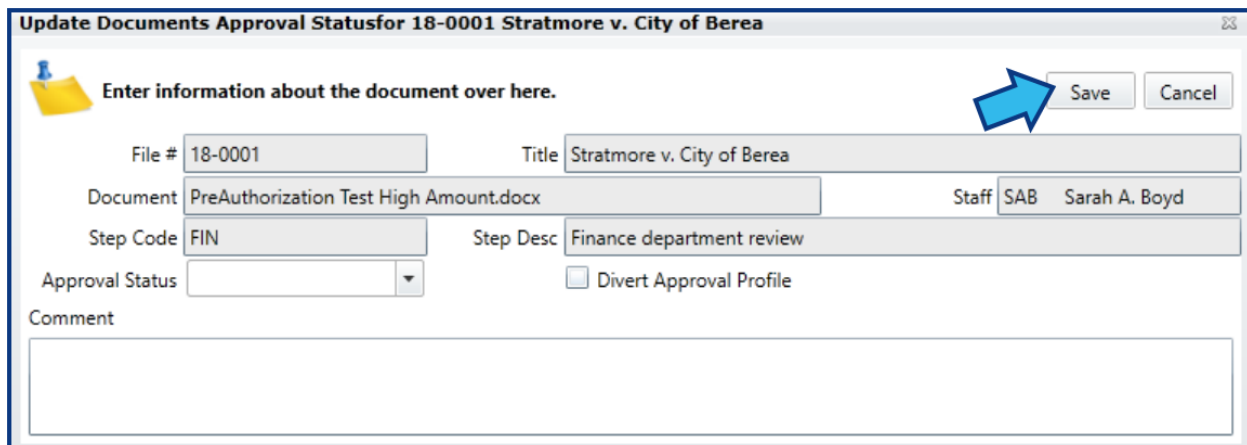
Alternatively, in either view, right-click a pending approval and select **Approve Document**.



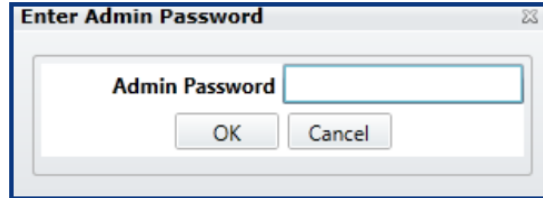
In the **Approval Status** drop-down of the **Documents Approval** window, select **Approved**.



Press **Save**.



If the user approving the document is not the **Staff** listed in the pending approval, a prompt for an administrator password is given. Only **System Administrators** and the individual assigned the approval step can give approval.



A dialog box titled "Enter Admin Password" with a close button in the top right corner. It contains a text input field labeled "Admin Password" and two buttons at the bottom: "OK" and "Cancel".

Once the approval is saved, the next person in the step list will be notified by email that they have a pending approval. The email contains a link to open the document.

Subject: CityLaw Web Document Approval Notification Email : 5/22/2019

Notice: CityLaw Web user has added document(s) for approval.

Below are the details for your reference.

Document(s) Added by: DEMO - Demo Cycom User
Added on: 5/22/2019

You can approve document(s) from Litigation->Attachments->Press '+' button for the document.->Click "Update Status"

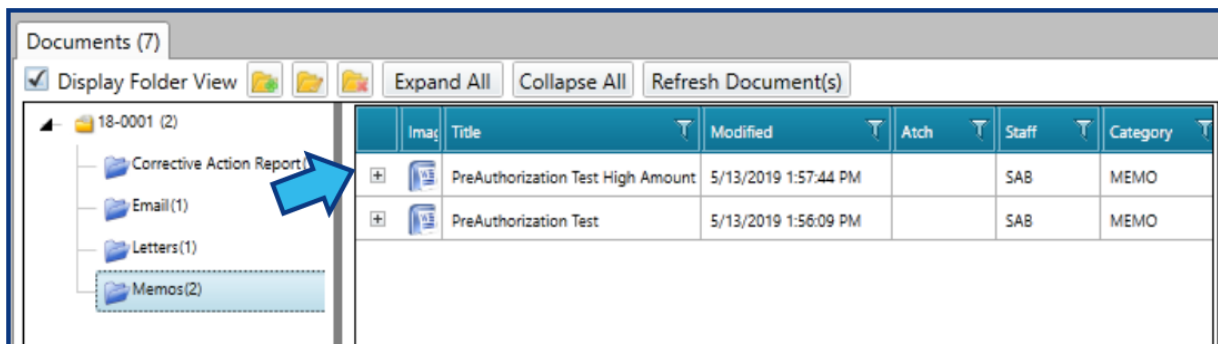
Document(s) which require approval:

File#	Title	Document Title
18-0001	Stratmore v. City of Berea	PreAuthorization Test.docx

Regards,
Cycom Support Team

Method 2. From the Documents tab of the matter.

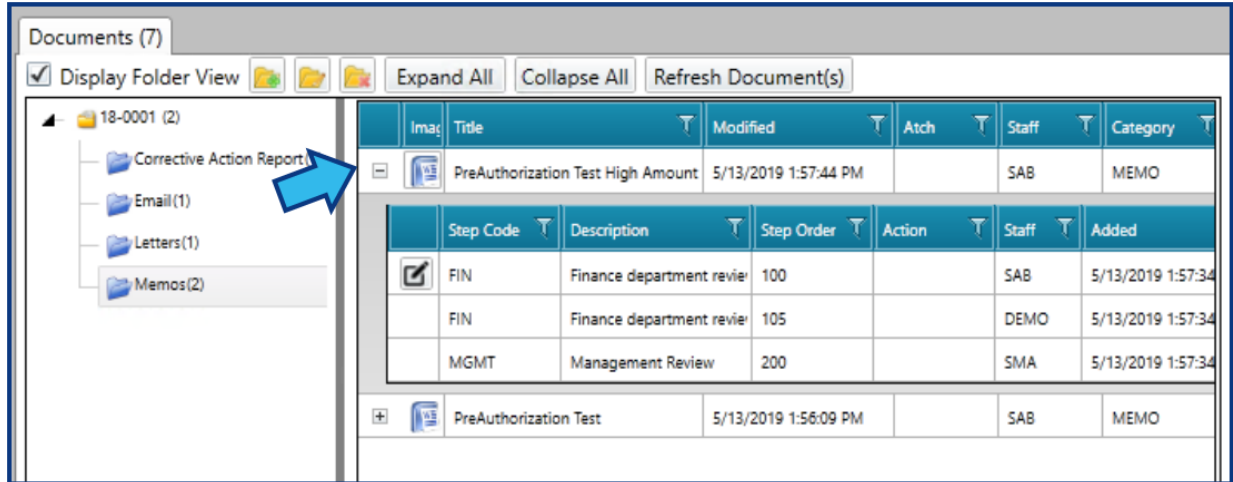
Documents with approval steps are in the **Documents** tab of the matter to which they are attached. They are distinguishable from other documents by the presence of a **Plus** box to the left of the document listing.






The interface shows a "Documents (7)" tab with a folder view on the left and a table on the right. A blue arrow points to a plus sign next to the "PreAuthorization Test High Amount" document in the table.

Image	Title	Modified	Atch	Staff	Category
+	PreAuthorization Test High Amount	5/13/2019 1:57:44 PM		SAB	MEMO
+	PreAuthorization Test	5/13/2019 1:56:09 PM		SAB	MEMO

Press the **Plus** box to see a list of approval steps. Note that when the approval steps are display, the **Plus** box changes to a **Minus** box. Pressing the **Minus** box will hide the list of approval steps again.






Documents (7)

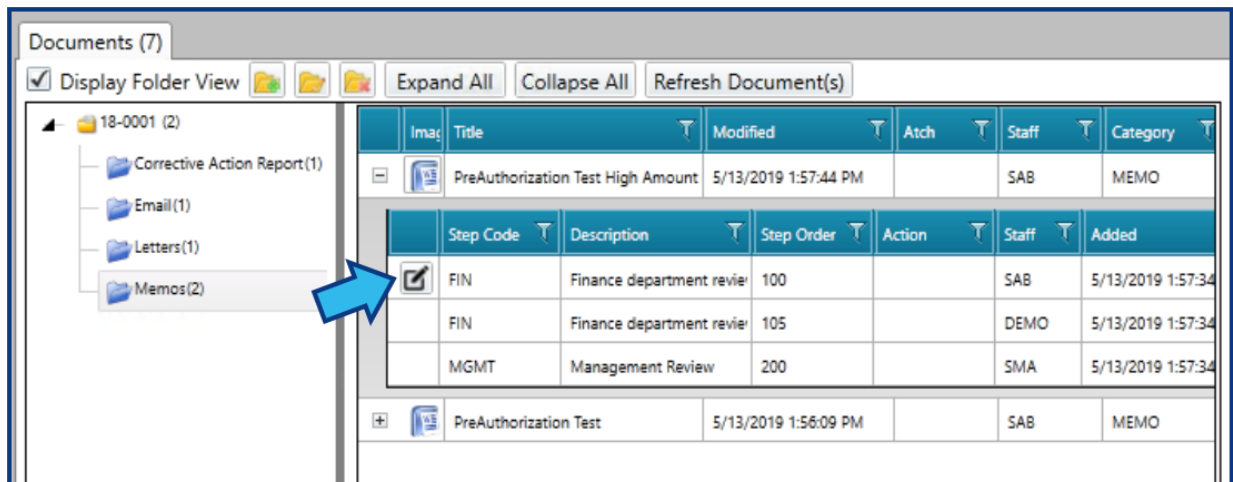
Display Folder View    Expand All Collapse All Refresh Document(s)

18-0001 (2)




- Corrective Action Report
- Email(1)
- Letters(1)
- Memos(2)

Imag	Title	Modified	Atch	Staff	Category
	PreAuthorization Test High Amount	5/13/2019 1:57:44 PM		SAB	MEMO
Step Code	Description	Step Order	Action	Staff	Added
	FIN Finance department review	100		SAB	5/13/2019 1:57:34
	FIN Finance department review	105		DEMO	5/13/2019 1:57:34
	MGMT Management Review	200		SMA	5/13/2019 1:57:34
	PreAuthorization Test	5/13/2019 1:56:09 PM		SAB	MEMO

To approve the next step, press the **Update Status** icon to the left of the step listing.






Documents (7)

Display Folder View    Expand All Collapse All Refresh Document(s)

18-0001 (2)

- Corrective Action Report(1)
- Email(1)
- Letters(1)
- Memos(2)

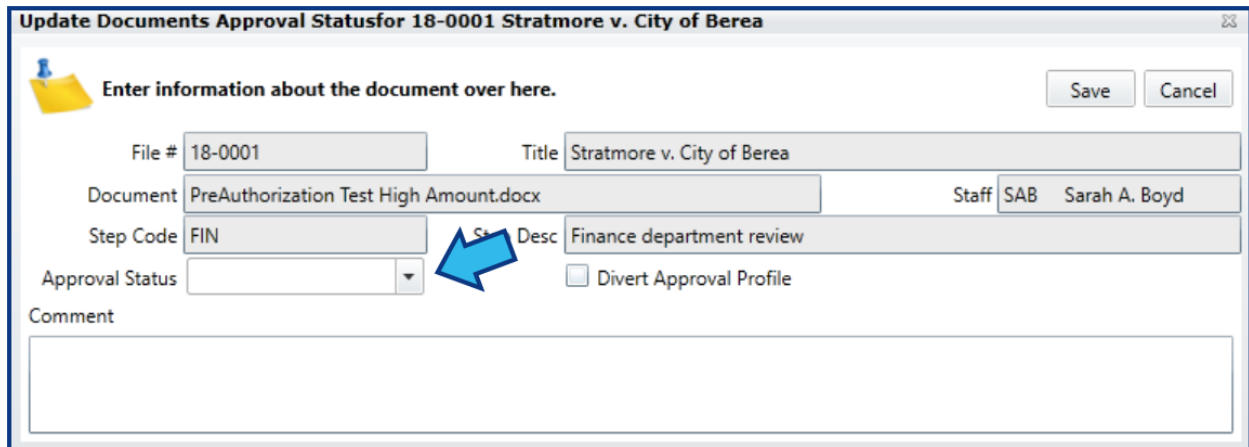
Imag	Title	Modified	Atch	Staff	Category
	PreAuthorization Test High Amount	5/13/2019 1:57:44 PM		SAB	MEMO
Step Code	Description	Step Order	Action	Staff	Added
	FIN Finance department review	100		SAB	5/13/2019 1:57:34
	FIN Finance department review	105		DEMO	5/13/2019 1:57:34
	MGMT Management Review	200		SMA	5/13/2019 1:57:34
	PreAuthorization Test	5/13/2019 1:56:09 PM		SAB	MEMO

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Enter Admin Password 23

Admin Password

A **Documents Approval** window appears allowing changes to the **Approval Status**.



Update Documents Approval Status for 18-0001 Stratmore v. City of Berea

Enter information about the document over here. Save Cancel

File # 18-0001 Title Stratmore v. City of Berea

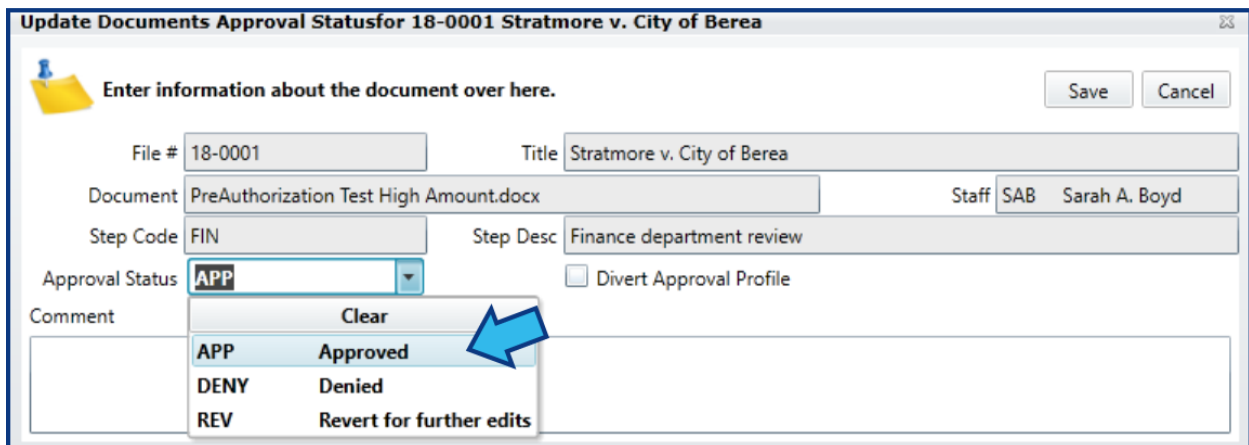
Document PreAuthorization Test High Amount.docx Staff SAB Sarah A. Boyd

Step Code FIN Step Desc Finance department review

Approval Status ▼ Divert Approval Profile

Comment

In the **Approval Status** drop-down, select **Approved**.



Update Documents Approval Status for 18-0001 Stratmore v. City of Berea

Enter information about the document over here. Save Cancel

File # 18-0001 Title Stratmore v. City of Berea

Document PreAuthorization Test High Amount.docx Staff SAB Sarah A. Boyd

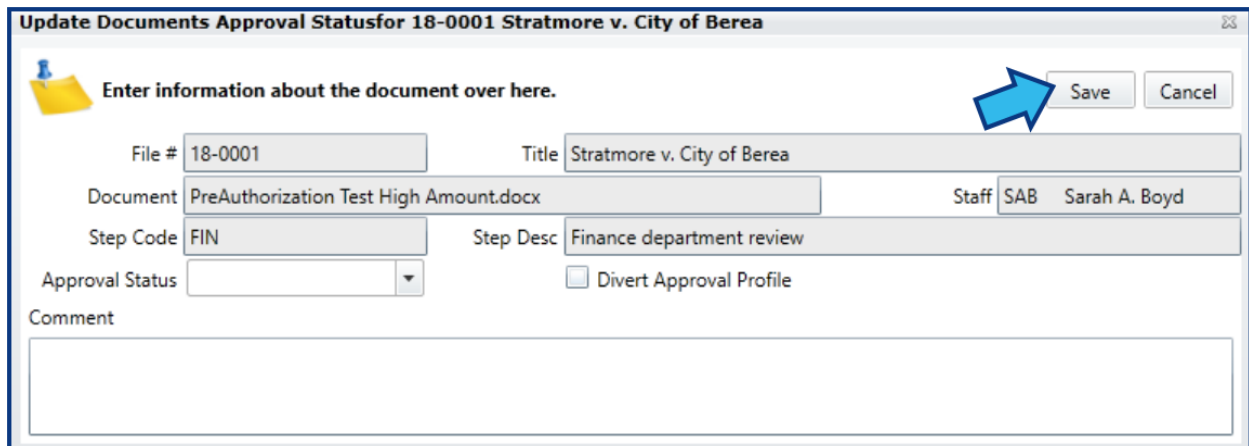
Step Code FIN Step Desc Finance department review

Approval Status **APP** ▼ Divert Approval Profile

Comment

- Clear
- APP** **Approved**
- DENY Denied
- REV Revert for further edits

Press **Save**.



Update Documents Approval Status for 18-0001 Stratmore v. City of Berea

Enter information about the document over here. Save Cancel

File # 18-0001 Title Stratmore v. City of Berea


Document PreAuthorization Test High Amount.docx Staff SAB Sarah A. Boyd

Step Code FIN Step Desc Finance department review

Approval Status ▼ Divert Approval Profile

Comment

The **Update Status** icon will move to the next step in the list once a step is approved.

	Step Code	Description	Step Order	Action	Staff	Added
	FIN	Finance department review	100	APP	SAB	5/13/2019 1:57:34
	FIN	Finance department review	105		DEMO	5/13/2019 1:57:34
	MGMT	Management Review	200		SMA	5/13/2019 1:57:34

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