Document Review and Approval Process

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Kahootz includes powerful features to help automate and monitor the process of getting feedback, final approval or sign-off from users on a document.

You can start a review cycle when you're creating a new item or uploading a new version using the panel on the upload page. It's also possible to start a review on an existing document using the "**Review"** section on the document's page.

> **Tip:** You'll need the appropriate permissions in order to modify a document.

Document commenting and requesting approval.

When starting the document review process, choosing either "**Comment"** or "**Approval"** will send out a notification/email to all assigned members.

You can choose from either a **comment** or **approval** style review.

- The comment style asks reviewers to provide feedback on the document through comments and indicate when they've finished commenting.
- The approval style asks reviewers to "approve or reject" the document explicitly. They can also submit comments, (perhaps including why they've rejected it or suggesting changes that will make it approvable.)

  Tip: When adding a review, you can select individuals by name using the @mention function to act as reviewers.

Notifications

You can also specify an optional completion date & write extra instructions in the "**Details"** section.

- Reviewers will receive that information as a notification and automatically subscribed to any future changes to the document.
- The review will appear as a task, shown on their "**My Tasks"** page and any "task" widgets on their "my dashboard" page.
- Users can even add a unique "**My Document Reviews"** dashboard item to highlight these.

With regards to notification reminders, tasks notify the user with a notification and email at the following intervals:

1. A task is created or assigned to you.
2. Reminders are sent seven days before the completion date.
3. The task is overdue.

> **Note:** A user will only receive an email if their email preferences have been set to do this.

However, you cannot switch off notifications so you'll always see alerts/reminders along the top bar in Kahootz.

When looking at a document in Kahootz, you will see the reviews/comments against it. The reviewers will see a special panel highlighting the work they need to do.

Completed reviews link to the relevant version of the document, so you can see the difference between who approved version 1, and the most current version.

> **Tip:** All actions are recorded & stored in the **"Audit Log."** You can also see this information via the document itself by clicking **"Activity"** and then the **"Reviews"** tab.

A brief overview of the document review process

1. User1 uploads a new document and asks User2 for comments.

2. User2 gets a notification & email advising User1 has asked for comments.
3. User2 clicks the email link and adds comments/indicates they've finished their review.
4. User1 gets a notification & email to advise User2 has commented on the document.
5. User1 reviews the document/comments and completes the process.

Every comment or change made to the document gets sent to all reviewers.

> **Tip:** Want to ask for comments or approval on other types of content in Kahootz? If you want people to review another item (feedback on a database design, or approval of text on a web page for example), you can add tasks to any of those items and ask for comments or approval.

Related Content

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