

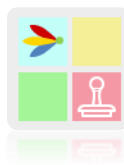


K-Docs Approve

for

SharePoint Online

Document Review and Approvals Made Simple



Installation and User Guide

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Introduction

Most organisations manage a set of core reference documents that are needed to help guide staff in the execution of their work. These are often referred to as Controlled Documents and typically include:

















- Policies
- Procedures
- Guidelines
- Best Practices
- User Manuals
- Work Instructions

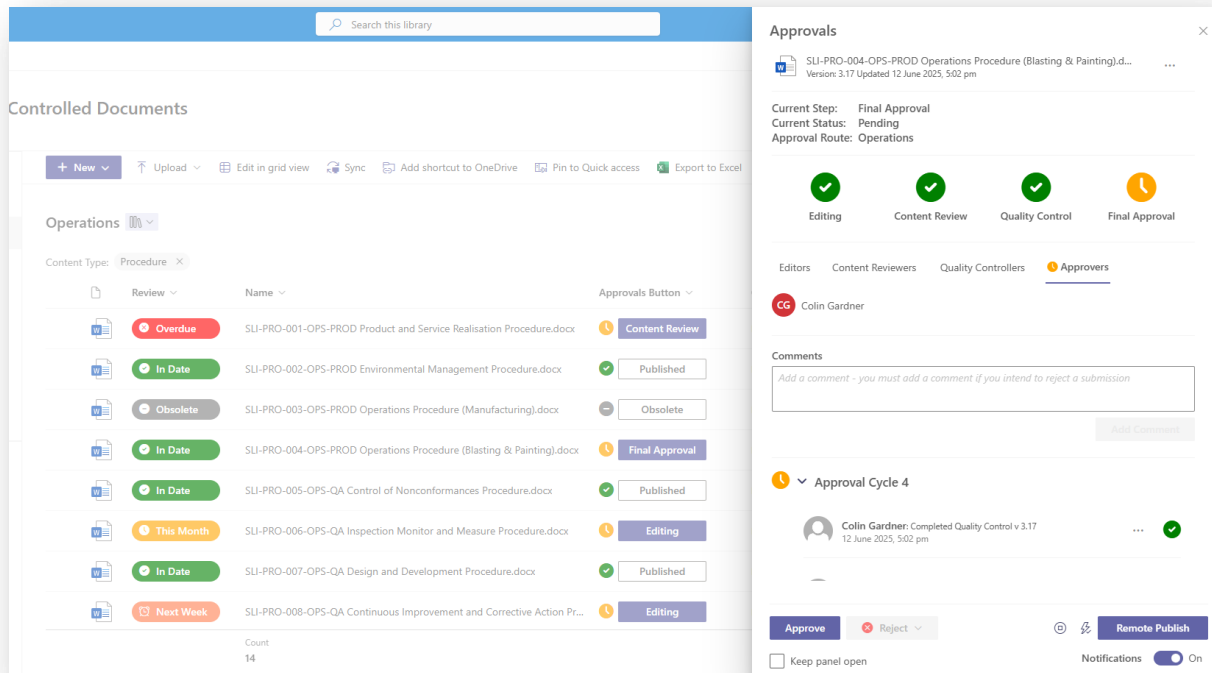
They are called Controlled Documents because they need to be properly managed to ensure that everyone is acting upon the same, and most recently document versions. The Nirvana of information management best practice is to establish a single source of truth as this ensures currency (we're all working from the most recently approved information) and consistency (we're all working from the same information).

Controlled Documents should also be subject to a regular review cycle to ensure:

- They continue to support the needs of the staff and the organisation.
- They remain fit for purpose.
- They comply with regulatory standards.
- Organisations operate within the law.

K-Docs Approve has been specifically designed to support this governance process, although the solution can be applied to many other business scenarios, where document approvals are required.

	Review ▾	Name ▾	Approvals Button ▾	Next Review Date ▾	Release Date ▾
	Overdue	SLI-PRO-001-OPS-PROD Product and Service Realisation Procedure.docx	 Content Review	9/06/2025 12:00 AM	26/04/2025
	In Date	SLI-PRO-002-OPS-PROD Environmental Management Procedure.docx	 Published	26/04/2026 12:59 PM	26/04/2025
	Obsolete	SLI-PRO-003-OPS-PROD Operations Procedure (Manufacturing).docx	 Obsolete	26/04/2026 9:04 AM	26/04/2025
	In Date	SLI-PRO-004-OPS-PROD Operations Procedure (Blasting & Painting).docx	 Final Approval	26/04/2026 12:23 PM	26/04/2025
	In Date	SLI-PRO-005-OPS-QA Control of Nonconformances Procedure.docx	 Published	26/04/2026 12:24 PM	26/04/2025
	This Month	SLI-PRO-006-OPS-QA Inspection Monitor and Measure Procedure.docx	 Editing	26/06/2025 12:00 AM	26/04/2025
	In Date	SLI-PRO-007-OPS-QA Design and Development Procedure.docx	 Published	26/04/2026 9:06 AM	26/04/2025
	Next Week	SLI-PRO-008-OPS-QA Continuous Improvement and Corrective Action Pr...	 Editing	20/06/2025 12:00 AM	26/04/2025



Why we built it

The native document approvals, built into SharePoint, are too simplistic for most formal approval processes. The alternative is to build a custom workflow solution using PowerApps and Power Automate, but that can become complex very quickly and usually requires considerable ongoing maintenance with a skill level that is beyond the technical capabilities of most users.

K-Docs Approve hits that middle ground of providing a simple tool that manages multi-stage document approvals without the overhead of complex workflows and custom development. It was developed to provide an easy-to-use solution to automate the approval cycles for Controlled Documents that are stored in SharePoint Online and so support good governance practices.

This solution will blow the mind of your auditors!

Key Features

The key features of this product are:

- It supports automated approval processes of between 1 and 5 steps without the need for Power Automate workflows.
- All user interactions (approvals, rejections and comments) are tracked and stored within the document list item.
- It looks and feels like a fully integrated part of SharePoint.
- It uses a state-machine design rather than a sequential workflow model making it easy to revert to earlier states, should reworking be required.
- It is simple and intuitive to use; users pick it up in a couple of minutes.
- The configuration wizard can be used to set up a library in just a few minutes.

- It's a roles-based system where permissions can be synchronised with a single click.
- States, roles and UI buttons can be customised to use language aligned with your processed and familiar to users.
- Approval routes can be set at the library level or for individual folders if required.
- Automated email notifications are sent to stakeholders, when they need them.
- It provides automatic tracking of review cycles with a traffic light system for documents that are in-date, nearly due or overdue.
- When a document is approved, a PDF rendition, or a native-format copy of the document, can automatically be published to one or more libraries which might be in any other site in your tenancy, using a process we call Remote Publishing.
- Metadata and Content Type assignments is carried through to remotely published documents.
- Documents can be flagged as obsolete.
- There is the ability to quick-publish documents, useful when making trivial updates or when importing documents initially.
- It is an ideal partner product for [K-Docs View](#), which our document access solution for consumers of published documents.

Free Trial

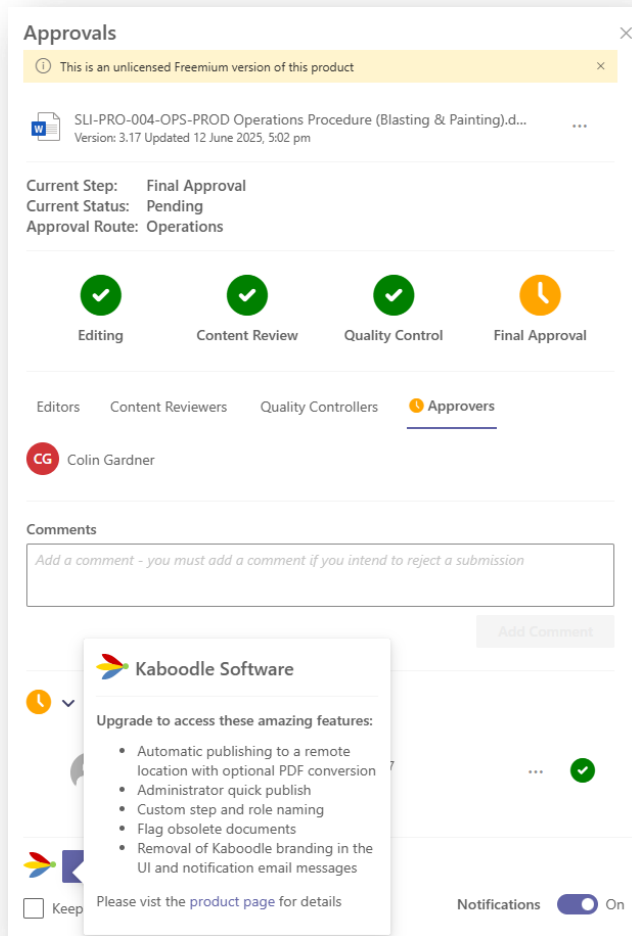
This product can be used with a free 30-day trial license, which can be extended on request. Registering for a trial is painless and fully automated – you can be up and running in a couple of minutes.

Just visit <https://kaboodle.software/trial> and fill out a simple form that only asks for 4 details.

Note that our trial licenses are product agnostic – you can trial all license-paid products with the same trial license. What have you got to lose!

Freemium Version

You can run this product without a license (trial or otherwise) but it will be branded with the Kaboodle Logo and operate with some restricted functionality as shown in the callout when the Kaboodle Logo is clicked.



We reserve the right to change the functionality that is offered with the unlicensed Freemium version of this product at any time, but the key constraining factors currently are:

- Remote Publishing is disabled.
- You cannot customise state or roles names or UI buttons.
- Administrator quick publish disabled.
- Document cannot be flagged as obsolete.
- Kaboodle branding is displayed in the UI and as a footer in notification emails.

These restrictions are removed for licensed products, including a trial license.

How K-Docs Approve Works

This section provides an overview of how the solution works. The process may sound complicated, but the user experience is simple and intuitive.



It involves:

- **Roles:** Users assigned to tasks and granted appropriate permissions to execute actions.
- **States:** A document must be in one, and only one, state at any given time.
- **Steps:** The actions pending, prior to transitioning to the next logical state.
- **Actions:** Possible actions that can be taken by users assigned to each role.

Note that in the licensed version of this product, roles and state can be customised so that the solution can be better aligned with your underlying governance processes, using terminology that may be more familiar to users.

In the Freemium (unlicensed) version of this product, the nomenclature used in the UI is as shown in the above graphic and cannot be changed.

Roles

There are (up to) 6 roles in the system

- **Editor:** **Editors** can create new documents and update existing ones.
- **Reviewer:** **Reviewers** check that the content of the documents to ensure they are fit for purpose.
- **Quality Controller:** **Quality Controllers** ensure that documents are checked for spelling and grammar and are in the correct format, style and otherwise conform to organisational standards.

- **Approver:** Approvers authorise the formal release and subsequent publication of authoritative document versions. These approved versions are the only documents which will be accessible to **Consumers**.
- **Consumer:** **Consumers** access published documents with read-only permissions. If **Remote Publishing** is enabled, **Consumers** do not need *any* access to the source documents as they will be accessing document renditions, published to remote target libraries.
- **Administrator:** Administrators manage the system configuration, including the assignment of users to roles in **Approval Routes** and perform specialist functions such as quick publishing, and flagging documents as obsolete.

Note that **K-Docs Approve** is very flexible. If no users are assigned to a specific role, it is assumed that the corresponding state/step is not required and so the UI and process will adapt by simply skipping to the next state in the process. This means the standard process can be simplified if some of the states or steps are not required.

The above roles reflect out logical thinking of a standardised approval process, but your concept of operation will be different. **K-Docs Approve** can easily be adapted to your way of thinking and your process logic. We have many customers who use this product in very different ways.

States

At any given moment, a document must be in one of the following 7 states:

- **Drafting:** The document just been created or initially uploaded, or a previously published document has been updated so that it is currently at a minor version, but it has not yet started on its first or next approval cycle. In the **Drafting** state the document has not yet been assigned to users in any role.
- **Editing:** The document has been assigned to users in the **Editor** role.
- **Content Review:** The document has been assigned to any **Reviewers** for content review.
- **Quality Control:** The document has been assigned to any **Quality Controllers** for quality review.
- **Final Approval:** The document has been assigned to **Approvers** for approval to be published as the latest approved major version of the document.
- **Published:** The document is published as a SharePoint major version. **Consumers** will have read-only access to published document versions only.
- **Obsolete:** The document has been flagged as obsolete.

License paid customers specify custom state names so that the environment can be tailored exactly to your needs. Freemium customers are limited to using the standard state names as listed above.

Steps

For each **State** there is a logical pending next step:

- **Pending Edit:** The document is the **Drafting** state and is pending transition to **Editing** (if users have been assigned to the **Editor** role).
- **Pending Content Review:** The document is in the **Drafting** or **Editing** state and is pending transition to **Content Review** (if users have been assigned to the **Reviewer** role).

- **Pending Quality Review:** The document is in the **Drafting, Editing or Content Review** state and is pending transition to **Quality Control** (if users have been assigned to the **Quality Controller** role).
- **Pending Final Approval:** The document is in the **Drafting, Editing, Content Review or Quality Review** state and is pending transition to **Final Approval**.
- **Pending Next Review:** The document is in the **Published** state and is pending the start of the next revision cycle.

Actions

There are a limited set of specific actions that can be performed by users assigned to each role, as summarised below:

- **Read:** All users who have at been assigned to a **Consumer** role will have read-level access to the published major versions of approved documents.
- **Create, Edit, Update and Deleted:** All user assigned to any other role can access and manage documents using SharePoint in the standard way.
- **Submit To:** Users assigned as **Editors, Content Reviewers, Quality Controllers or Approvers** can execute a **Submit To** action in accordance with the current state and the next logical step.
- **Reject To:** Users assigned as **Content Reviewers, Quality Controllers or Approvers** can execute a **Reject To** action in accordance with the current state and logical set of available previous states.
- **Approve:** Only users assigned to the **Approver or Administrator** roles can approve documents as the next authorised major version and trigger automatic document publishing (if configured).
- **Quick Publish:** The system provides a way to execute a quick publish, which can be used to short-cut the formal publishing process. By default, this permission can only be performed by **Administrators**, but this action can also be assigned to **Approvers** if required.
- **Flag as Obsolete:** The system provides a way to flag a document as being obsolete. By default, this action is only available to **Administrators** but permission to execute this action can be made available to all other roles except for **Consumers**.
- **Manage Approval Routes/Permissions:** This is done by an **Administrator** who must be assigned full control of the site in which source documents reside.
- **Library Configuration:** This is also performed by an **Administrator** and requires full control of the site.

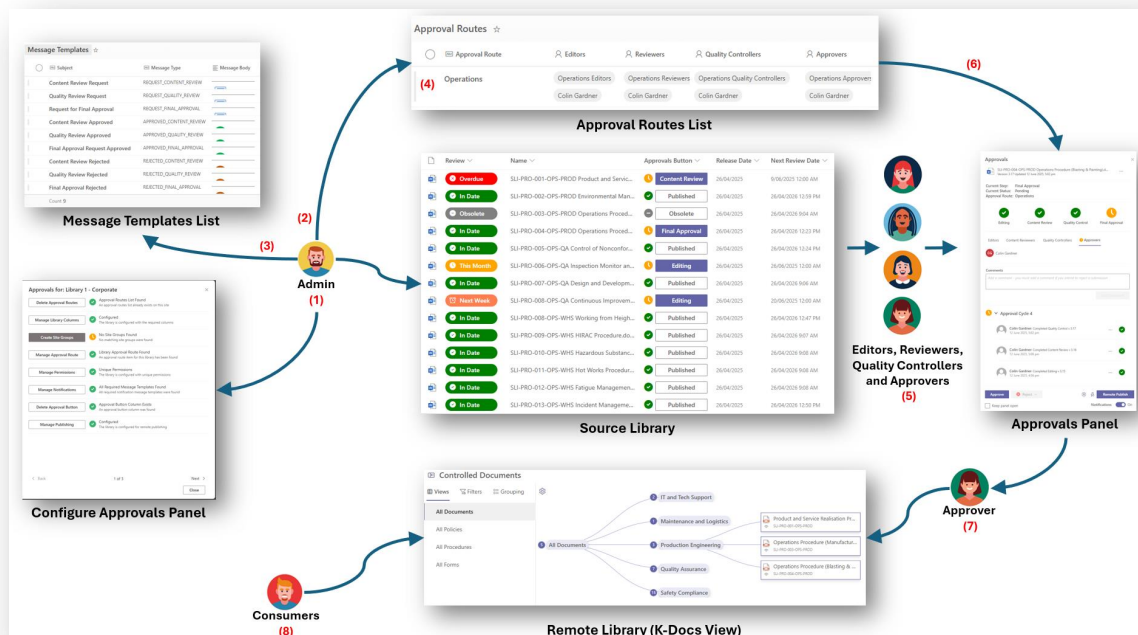
Not that licensed-paid customers are able to customise the action buttons as presented in the UI. This includes:

- Applying custom button text.
- Setting a custom tooltip.
- Setting a custom button icon.
- Setting a custom confirmation text message which can be used as a final safety check requiring users to conform their actions prior to execution.

Freemium customers are unable to make these customisations.

System Architecture and Concept of Operation

This section provides an overview explanation of the components of the system and how they have been architected to deliver the solution.



The key points are summarised below:

- When a site owner or site collection administrator (in the **Administrator** role) accesses the source library, they can configure it to work with **K-Docs Approve** using the **Configure Approval Panel** (1).
- This will involve provisioning an **Approval Route List** (2) and a **Message Templates List** (3) which only needs to be done once when the first library in the site is configured.
- The **Message Templates** list stores 10 template list items for email notification message sent out by the system. These message templates can be customised by the **Administrator** as required.
- The **Configure Approval Panel** is also used to add the default **Approval Route** (a list item in the list) for the source library (4).
- The **Administrator** can also create **Approval Route** list items for use at the folder-level, but this is either done manually or from the library UI and not from the **Configure Approval Panel**.
- **Editors, Reviewers, Quality Controllers** and **Approvers** open the **Approvals Panel** and data about the current approval cycle, as well as historical data is read from a hidden multi-line text field in the document item (5) as well as being pulled from the assigned **Approval Route** (6).
- As the process advances, the solution will send automated email notifications to the appropriate stakeholders based on the current state, and the action taken (approve or reject).
- If **Remote Publishing** is enabled, a managed copy or PDF rendition of the source document is sent to target remote libraries, complete with metadata and Content Type assignment (7).

- **Consumers** will access the published documents from the remote library, either in the standard way using the native experience of SharePoint or by using our custom viewer solution [K-Docs View](#).

Installing the Solution Package

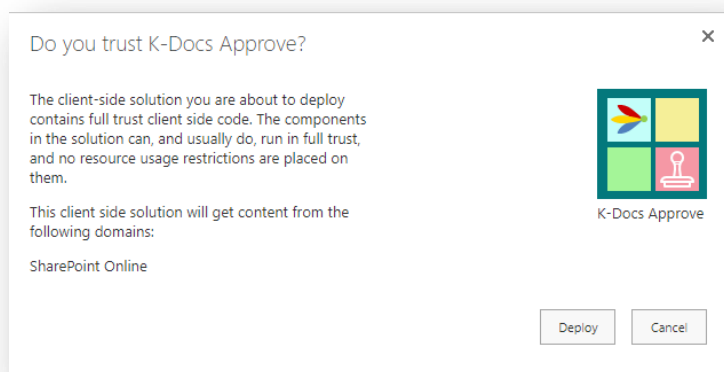
The solution package can either be installed manually or from the Microsoft App Source.

Uploading and Deploying the Solution Package Manually

The solution package file is named **k-docs-approve.sppkg** and the latest version can be downloaded from the Kaboodle Software web site <https://kaboodle.software/Solutions/K-Docs/K-Docs-Approve>.

The package is added to the Application Catalog in the same way as for every SPFx solution, that is by uploading the solution package file to the Apps for SharePoint Gallery in the Global App Catalog site for the tenancy or a Site Collection App Catalog, if preferred.

Uploading the solution package to either the Global App Catalog or a local Site Collection App Catalog will trigger the display of the deploy solution dialog as shown in the screenshot below.



K-Docs Approve only requires access to the SharePoint REST API. No special permissions are required for the solution to access other services, such as the Graph API.

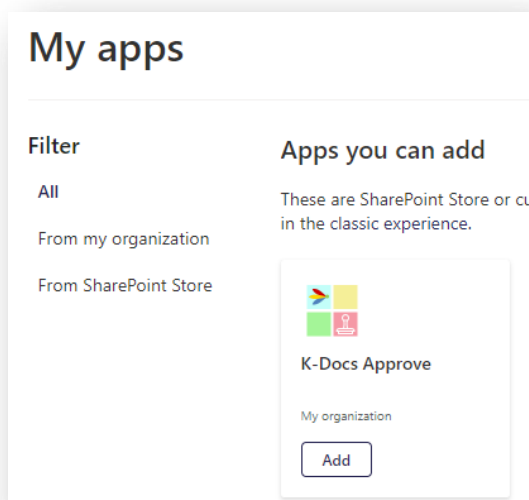
Installing the App on a Site

You only need to install the solution on sites where source documents reside. The solution package does not need to be installed on sites which may be target locations for **Remote Publishing**.

By design, **K-Docs Approve** cannot be globally deployed and so must be explicitly installed on the sites in which it is intended to be used.

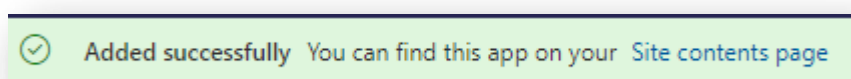
To do that, click on the **App an app** link from the **Site Actions** menu (the cog icon on the top right corner of every page) or from **New > App** menu item from the site homepage or Site Contents page.

From the **My apps** page you will see the **K-Docs Approve** app card in the **Apps you can add** section of the page as shown below.

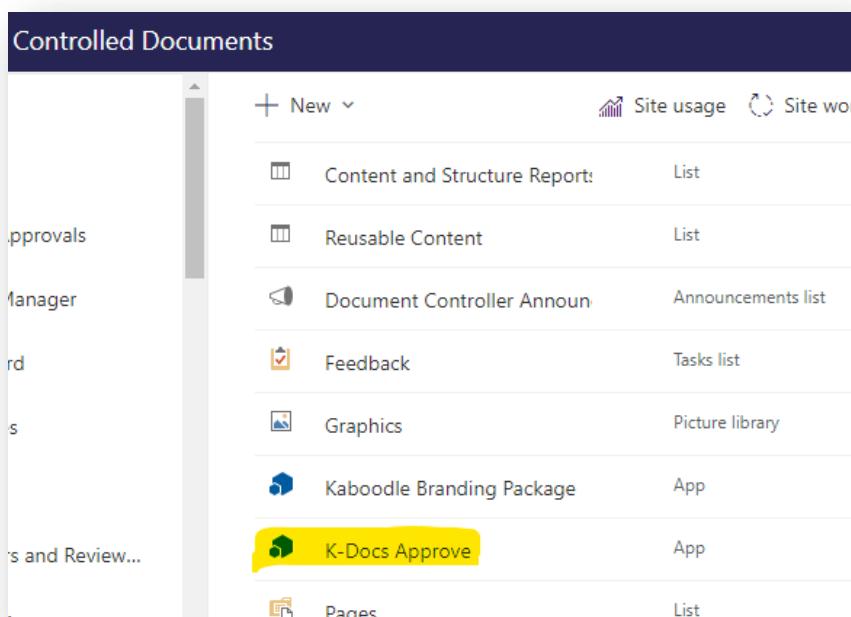


Note that you must be logged in to the site with at least **Designer** level permissions to be able to add an app to the site.

To add **K-Docs Approve**, simply click the **Add** button on the **K-Docs Approve** app card. It may take several seconds but the SharePoint UI will report when it has been successfully installed and display a green status message, like that shown below.



If you click on the **Site contents page** link, you will see the app listed, as highlighted below.



Installing from the Microsoft App Source

To be provided

Library Preparation and System Configuration

Once **K-Docs Approve** has been installed, you will want to test it out with a library in the site. To do that, there are a few simple steps that need to be completed, as detailed in the sub-sections which follow.

Configure the Library for Major and Minor Versioning and Content Approval

K-Doc Approve has been designed to work with libraries that have been configured for Major and Minor Versioning and with Content Approval enabled. These are standard capabilities that can be enabled on every SharePoint document library.

These features are configured from the **Version Settings** page of library settings, as shown below:

Settings > Versioning Settings

Content Approval
Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Require content approval for submitted items?
☒ Yes ☐ No

Document Version History
Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Create a version each time you edit a file in this document library?
☐ Create major versions
 Example: 1, 2, 3, 4
☒ Create major and minor (draft) versions
 Example: 1.0, 1.1, 1.2, 2.0

Keep the following number of major versions:

☐ Keep drafts for the following number of major versions:

Unless a library is configured with these settings, the solution will not display the **Configure Approvals Button**, described in the next section, and so the library cannot be configured to use **K-Docs Approve**.

Configure Draft Item Security

When you enable the library for Content Approval, as described in the previous step, the option to set **Draft Item Security** becomes enabled in the same Version Settings configuration page. By default this is set to **Only users who can approve items (and the author of the item)**, as shown below:

Draft Item Security
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. [Learn about specifying who can view and edit drafts.](#)

Who should see draft items in this document library?
☐ Any user who can read items
☐ Only users who can edit items
☒ Only users who can approve items (and the author of the item)

As we need users with Edit level permissions to be able to change documents, we need to change this setting to reflect that requirement.

Draft Item Security

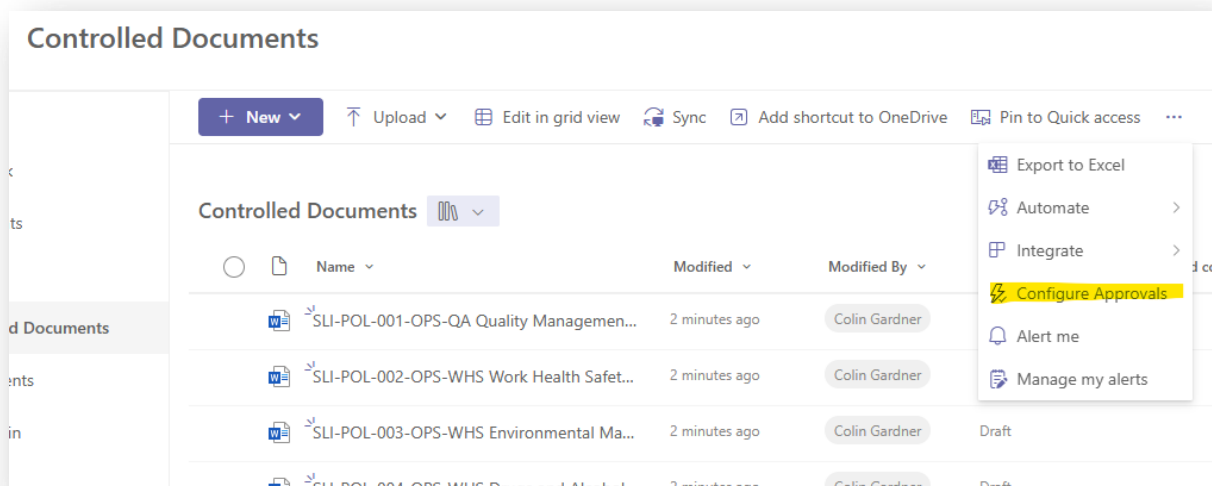
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. Learn about specifying who can view and edit drafts.

Who should see draft items in this document library?

- ☐ Any user who can read items
☒ Only users who can edit items
☐ Only users who can approve items (and the author of the item)

The Configure Approvals Button

Once Major/Minor Versioning and Content Approval have been enabled, the library will be extended to display a custom command **Configure Approvals Button** as highlighted below:



Note that the **Configure Approvals Button** is only displayed when:

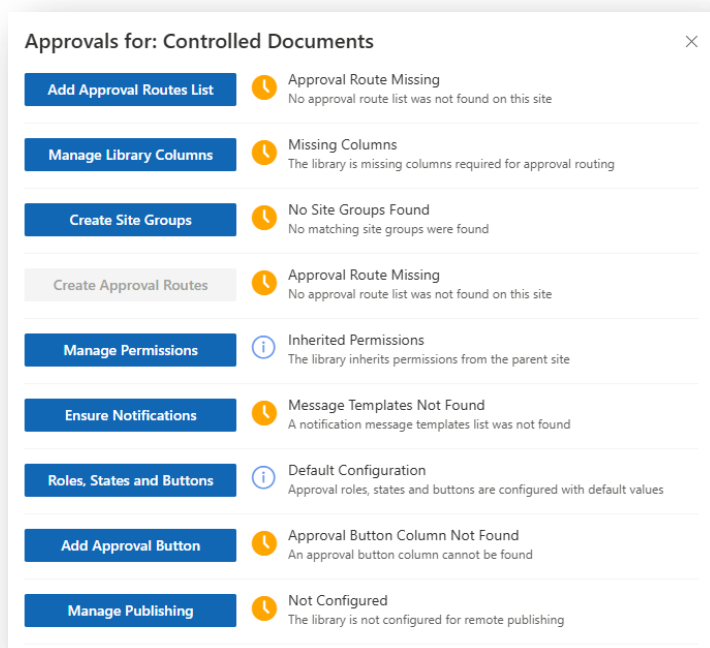
- No items are selected in the list view
- If you are logged in as a Site Owner or a Site Collection Administrator.
- The library has been configured with major/minor and Content Approval enabled.

This is to protect against accidental and unauthorised configuration changes.

If the above settings have been made to the library but the **Configure Approvals Button** is not showing as expected, perform a hard page refresh (Ctrl + R) to ensure browser cache is refreshed.

The Approvals Configuration Panel

The **Approvals Configuration Panel** is shown in the screenshot below. It shows a bank of configuration buttons.



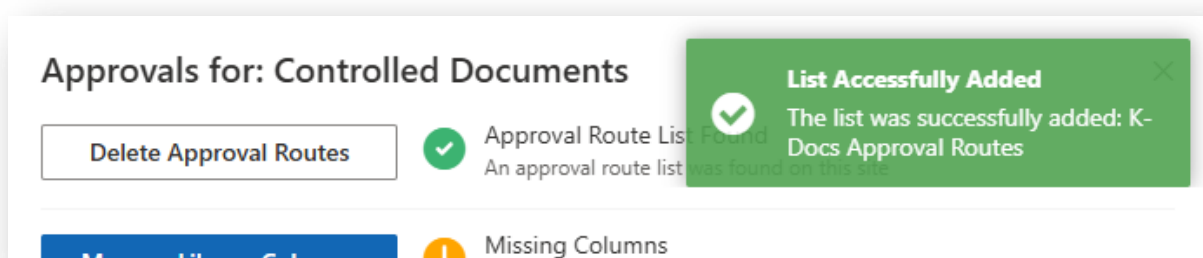
This may look daunting but for the most part you will just be clicking the buttons from top-to-bottom to get things set up.

The sub-sections which follow will guide you through the process.

Add Approval Routes List Button

This button is used to create or remove the **Approval Routes List**, where each list item is used to define an **Approval Route** item in which users can be assigned to roles.

Clicking on this button will start the provisioning process and a few seconds later the UI will report that the list was successfully added, as shown the screenshot below.

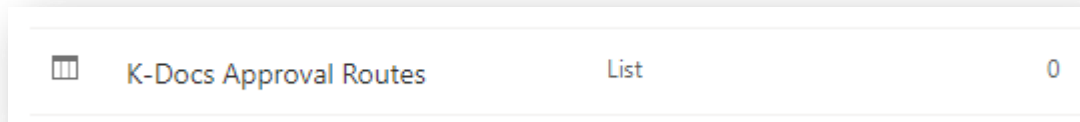


When the solution detects that the **Approval Routes List** already exists in the site, the button will change so that when clicked, the existing **Approval Routes List** can be deleted, although you would only ever want to do this if the capability is no longer required in the site.

You can also delete the list manually via the standard SharePoint UI, if preferred. In either case the list will be lodged in the recycle bin and so can be restored if it was deleted by accident or in haste.

There is only a need for one **Approval Routes List** in the site and so if you are using **K-Docs Approve** on multiple libraries in the same site there will be no need to click this button more than once.

Once you have a green status icon you are ready to progress to the next setup task but before doing so, you can review the site content page of your site and you will see that it contains a new, empty **Approvals Route List** with the default title, **K-Docs Approval Routes**, as shown below:



You can use the standard SharePoint UI to set a custom title and description for this list, if desired.

If you review the structure of this list you can see that it contains the columns as shown below:

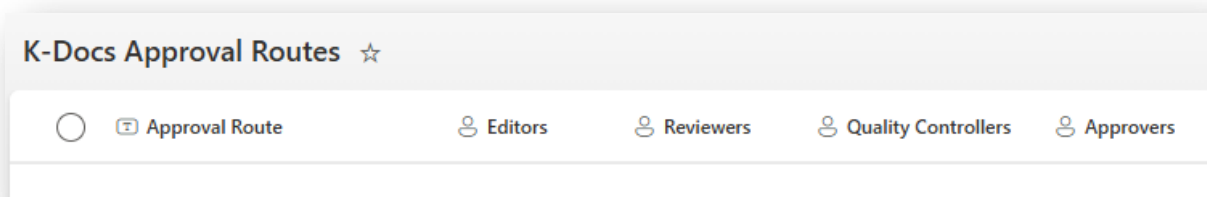
Columns	
A column stores information about each item in the list. The following columns are currently available in this list:	
Column (click to edit)	Type
Approval Route	Single line of text
Folders	Multiple lines of text
Consumers	Person or Group
Editors	Person or Group
Reviewers	Person or Group
Quality Controllers	Person or Group
Approvers	Person or Group
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

- **Approval Route:** The **Approval Route** column is the re-titled standard title column that comes with all SharePoint lists and is used to provide a short title for each **Approval Route** item.
- **Folders:** The **Folders** column is not intended to be edited through the SharePoint UI, and it is hidden in data-entry forms. It will contain JSON text that identifies the libraries and folders which have been assigned to use the **Approval Route** item. A library or folder can only be assigned to one **Approval Route** at a time, but the same **Approval Route** item can be used in multiple places within the same site, even in different libraries.
- **Consumers:** A standard multi-value user column that can be assigned users and SharePoint groups who will be assigned to the **Consumer** role and can read documents assigned to the approval route.
- **Editors:** A standard multi-value user column that identifies users and SharePoint groups who will be assigned to the **Editor** role.
- **Reviewers:** A standard multi-value user column that identifies users and SharePoint groups who will be assigned to the **Reviewer** role.

- **Quality Controller:** A standard multi-value user column that identifies users and SharePoint groups who will be assigned to the **Quality Controller** role.
- **Approvers:** A standard multi-value user column that identifies users and SharePoint groups who will be assigned to the **Approver** role.

You can change column titles and descriptions if required but note that this will not change the text used to label roles in the **Approval Panel**. Setting up custom role names is described later in this document.

Note that the default view shows only the **Approval Route, Editors, Reviewers, Quality Controllers** and **Approvers** columns as these are the columns that you are likely to want to view in most scenarios.



This view can of course be updated as may be required.

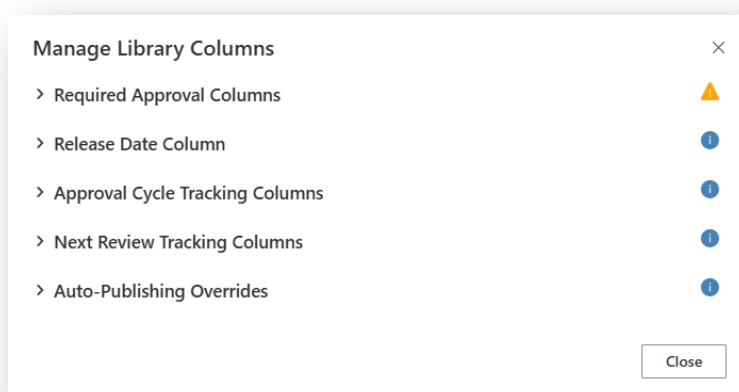
Note that a link to the list will be added to the site navigation but this can also be removed using the standard SharePoint UI if not required.

The list can also be renamed if required.

Manage Library Columns Button

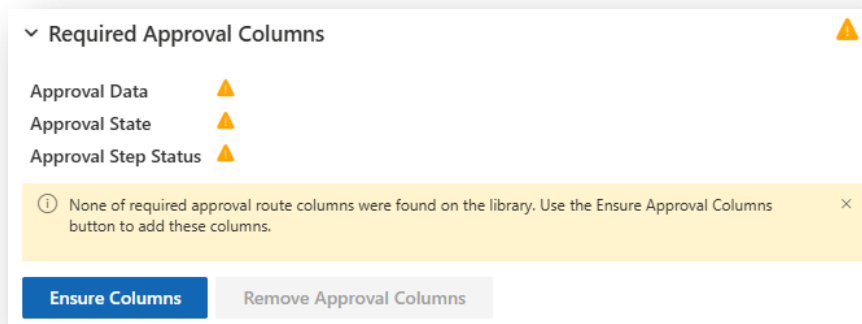
The current approval State, Step Status, comments and historical approval data needs to be stored in custom columns that will be added to the source library. The **Manage Library Columns Button** is used to ensure that these additional data columns are added to the library.

Clicking on the button will display the **Manager Library Columns Dialog**, as shown below:



The dialogs consists of a 5 sections.

Required Approval Columns Section

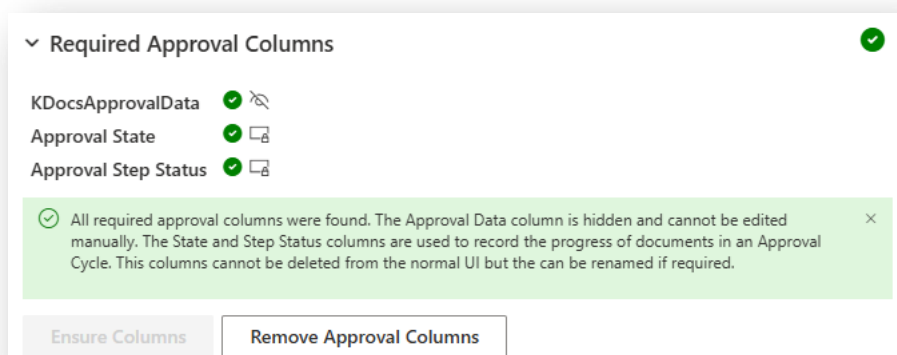


Initially yellow warning icons will be displayed to report that the minimum set of columns required by the solution have yet to be added to the library. These columns are:

- **Approval Data:** This is a hidden multiline text field used to store the approval cycle log data.
- **Approval State:** A single line text field used to store the current State value.
- **Approval Step Status:** A single line text field used to store the status of the current step and will be set to one of the following values as the approval process advances:
 - **Approved:** The current step has been approved
 - **Rejected:** The current step has been rejected
 - **Pending:** The current step is pending action
 - **Not Ready:** The process has yet to reach this step
 - **Not Required:** The step is not required as no users have been assigned to the relevant role.

The data in all of these columns is managed by **K-Docs Approve** and should not be edited manually.

Clicking the **Ensure Columns Button** will add the above columns to the library and the UI of the dialog will be updated to show that these data columns now exist.



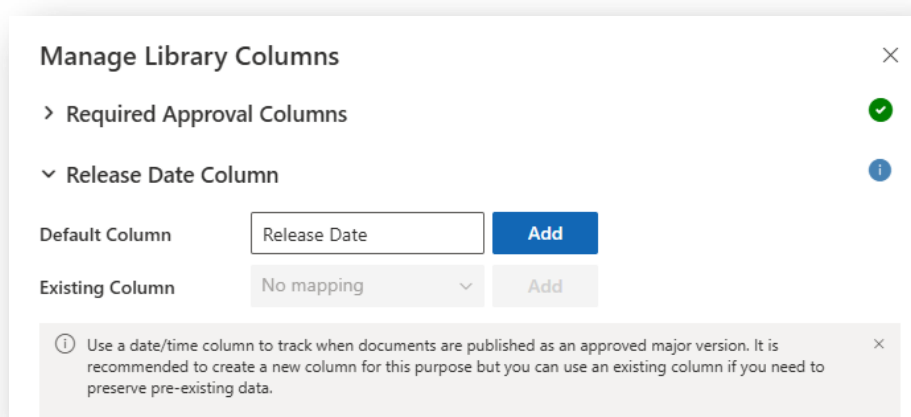
As can be seen above, when the minimum set of core columns exist in the library, the **Remove Approval Columns Button** is enabled. Using this button will remove the core data columns from the library but this should only be done if you are certain that the library no longer needs to be configured

for use with **K-Docs Approve**. If you remove these columns, all data that may have been stored within them will be lost permanently. This is the same as if the columns were removed from the library manually. There is no recycle bin for column data and so use this function with care.

Release Date Column Section

Although internally, SharePoint records when a document was last published as a major version, that information is only accessible via Version History and is not available as a column in the library. This is unfortunate as makes it difficult to track when a document might next be due for a review. For instance, an organisation may have a policy that all Controlled Documents need to be reviewed annually, to ensure they remain compliant and fit for purpose.

With **K-Docs-Approve**, we can provision a Date/Time column for this purpose using the controls in the **Release Date Column Section** of the dialog.



Manage Library Columns

> Required Approval Columns

▼ Release Date Column

Default Column: Release Date **Add**

Existing Column: No mapping **Add**

Use a date/time column to track when documents are published as an approved major version. It is recommended to create a new column for this purpose but you can use an existing column if you need to preserve pre-existing data.

You can use the above UI create a new column to track when documents were published as a major version. You can give this column a custom title, but we call it **Release Date** by default as the column will store the date and time when the document was last released as an authoritative major version.

You can later rename this column using the standard SharePoint UI if need be.

If there are no custom date/time columns defined in the library, the **Release Date Column Picker** control will be disabled and show “No mapping”, as is the case above

However, if you are enabling a pre-existing library to use **K-Docs Approve**, it is possible that may have already configured the library with a column for this purpose where the value is set manually or via workflow.

In such circumstances, you can configure the system to use an alternative (pre-existing) date time column to track when documents are published. In the example below, the dialog reports that the source library contains a date/time column that might potentially be used for this purpose. In this case, instead of creating a new column, you would use the UI to set up a mapping to the existing column.

Manage Library Columns [X]

Release Date Column

Release Date [v] **Add**

No mapping be used selected

Release Date

Specific Next Review

Ensure Approval Columns

Close

This is useful if you need to use pre-existing historical tracking.

When you click the **Add** button to either add a new column or set up a mapping to an existing column, the UI will update to report the current status.

▼ Release Date Column [✓]

Default Column Release Date Add [✓] [trash]

Existing Column No mapping [v] Add

[✓] This library is currently configured with a default Release Date column 'Release Date', which will be used to store release date values i.e the date when the document was published as an approved major version. [X]

You can use the **Delete** (trash can) button to permanently delete the **Release Date** column set up using the dialog. As always, great caution must be taken when deleting columns as this may result in permanent data loss.

You can also use the dialog to delete the **Release Date** column mapping if it is no longer required.

Note that removing these columns will result in permanent data loss, as would be the case if these columns were deleted through the standard SharePoint UI, so great care must be taken when using this configuration tool, once approvals are underway.

Approval Cycle Tracking Columns

Approval Cycle Tracking Columns

Pending Action	<input type="text" value="Pending Action"/>	<button>Add</button>
Approved By	<input type="text" value="Approved By"/>	<button>Add</button>
Approved	<input type="text" value="Approved"/>	<button>Add</button>
Quality Checked	<input type="text" value="Quality Checked"/>	<button>Add</button>
Quality Checked By	<input type="text" value="Quality Checked By"/>	<button>Add</button>
Reviewed By	<input type="text" value="Reviewed By"/>	<button>Add</button>
Reviewed	<input type="text" value="Reviewed"/>	<button>Add</button>
Edited By	<input type="text" value="Edited By"/>	<button>Add</button>
Edited	<input type="text" value="Edited"/>	<button>Add</button>

ⓘ Adding an Action Pending column is useful as you can create a view using the [Me] option to show all documents which are pending action by the current user.
 Use the other controls to optionally add columns that will record approval tracking information (user and date/time). This data is automatically logged for each approval cycle and so you only need these columns if you have a need to promote this information to library columns.

Ensure Columns Remove Columns

The first control in this group can be used to add a **Pending Action** column. This is a multi-select user column and is used to store the users who are stakeholder for the next step i.e. those users who are assigned to the active role.

This is useful because you can set up views on the library using the **[Me]** filter for this column and so users can access the view and easily see which actions are pending their action.

As the process advances the users in the **Pending Action** column will be updated. At the end of an approval cycle, when the document is approved and published as a major version, this column will be cleared.

It is not usually necessary to externalise the tracking data for the current approval cycle, but if you need to do this, you can use the rest of the controls in this group to provision any tracking columns you may need.

For each step actions there are potentially 2 columns that might be used to track state transitions:

- Who completed the action
- When the action

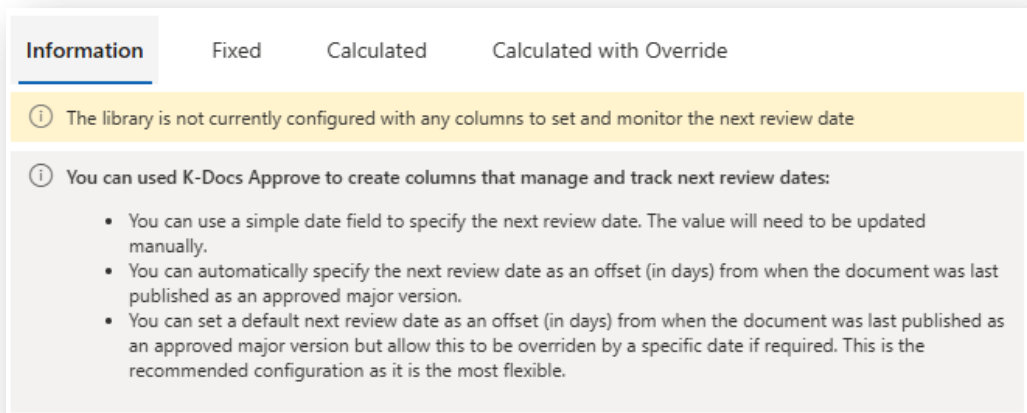
For example, the **Quality Checked** column would record the date time when process when the Quality Review State was approved or rejected and the **Quality Checked By** column is used to record the user who completed that action.

You can add any columns you may need to track state transitions. The **Ensure Columns** button is provided as a shortcut if you need to provision all 8 tracking columns. Similarly, the **Remove Columns** button can be used to remove all state tracking column defined in the library with a single click.

It is possible to use **Approved By** column to identify the approver as a mapped metadata value to the remote publishing location. This might be useful if you need to inform **Consumers** as to who approved the document version they are using. However, there are other ways to achieve this, detailed later in this document, without the need for these additional columns

Next Review Tracking Columns

This next control group is used to set up tracking columns if you need **K-Docs Approve** to track when documents might be due for their next review cycle



Information Fixed Calculated Calculated with Override

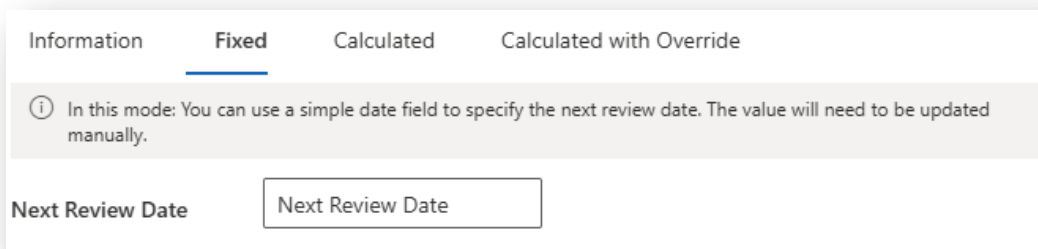
i The library is not currently configured with any columns to set and monitor the next review date

i You can use K-Docs Approve to create columns that manage and track next review dates:

- You can use a simple date field to specify the next review date. The value will need to be updated manually.
- You can automatically specify the next review date as an offset (in days) from when the document was last published as an approved major version.
- You can set a default next review date as an offset (in days) from when the document was last published as an approved major version but allow this to be overridden by a specific date if required. This is the recommended configuration as it is the most flexible.

There are 3 ways in which the necessary columns might be set up

Fixed



Information **Fixed** Calculated Calculated with Override

i In this mode: You can use a simple date field to specify the next review date. The value will need to be updated manually.

Next Review Date

This is the simplest scenario where a standard date column, defaults to Next Review Date, can be used to manually set the date when the document is due for its next review.

Note that if you set this value after a document has been published, it will revert to a minor version and so will no longer appear as **Published** in the source library. To avoid this, you would need to manually set the **Next Review Date** value prior to final approval or execute an admin quick publish after the document has been published to restore it to a published document.

Although this is the simplest scenario in that it only requires one additional column in the library it is also the least flexible.

Calculated

Information	Fixed	Calculated	Calculated with Override
<p><i>i</i> In this mode: You can automatically specify the next review date as an offset (in days) from when the document was last published as an approved major version.</p>			
Next Review Date		Next Review Date	
Review Period		Review Period	

This configuration will provision 2 columns:

- **Next Review Date:** In this scenario, this is a calculated column, configured to return a date value.
- **Review Period:** A number column used to store the number of days between revision cycles. The default value is 365, but this can be adjusted using the standard SharePoint UI.

The formula in the **Next Review Date** column is based on the **Release Date** and the **Review Period** column values. When the document is approved as a major version the date and time is recorded in the **Release Date** column. The **Next Review Date** value is simply the **Release Date** + the value in **Review Period** column. So, if a document is approved as a major version on **1 Jan 2025** the **Next Review Date** value will be **1 Jan 2026**.

This is more flexible than the first option as it is possible to set a different **Review Period** for different documents. For example, it could be that Policy documents only need to be reviewed every 2 years and so the **Review Period** can be set to 730, whereas Procedures need to be reviewed annually.

Calculated with Override

Information	Fixed	Calculated	Calculated with Override
<p><i>i</i> In this mode: You can set a default next review date as an offset (in days) from when the document was last published as an approved major version but allow this to be overridden by a specific date if required. This is the recommended configuration as it is the most flexible.</p>			
Next Review Date		Next Review Date	
Review Period		Review Period	
Specific Review Date			Specific Review Date

With this scenario there are 3 columns set up:

- **Next Review Date:** A calculated column, configured to return a date value, as above

- **Review Period:** A number column used to store the number of days between revision cycles, as above.
- **Specific Review Date:** A date column that can be used to specify a specific date value when the document is due for review.

In this scenario, the formula in the **Next Review Date** column is different to the above in that it checks to see if a specific date value has been specified, in which case, that value trumps any value which might be returned based on the **Release Date** and the **Review Period** column.

When a document is next approved as a major version, any value in the **Specific Review Date** is cleared.

This is the most flexible (and so recommended) option, as it allows next review date values to be calculated dynamically based on when the document was last approved as a major version but provides the option to override that calculated value if necessary.

Adding Columns to Content Types

Although the controls in the Configuration Panel add columns to the library, they will not include any of these fields in the Content Types used by the library (assuming Content Types are enabled). For the most part, this is what you would want as it is not desirable or intended that users should set state or step status values manually.

However, when configuring the system with a **Specific Review Date** column or with a simple **Review Date** column which is set manually, you may wish to make these columns accessible to users so that the appropriate values can be set using the standard SharePoint property edit forms. To do that, you will need to add the columns to the Content Types using the standard SharePoint UI.

Alternatively, you might decide not to include these columns with the Content Type, in which case the column values can still be edited using SharePoint's **Edit in grid view** feature.

The Review Column

Adding new columns to track approval cycles, using any of the above modes also adds an additional calculated column to the library, named **Review** by default.

Review	Calculated (calculation based on other columns)
Review Period	Number
Specific Review Date	Date and Time
Next Review Date	Calculated (calculation based on other columns)

This column is linked to a field customizer which will render a colour coded pill which provides clear information on the status of the approval cycle for the document. The possible values and colour coding are as follows:

- **Unpublished:** Grey
- **In Date:** Green
- **This Week:** Coral
- **Next Week:** Coral
- **This Month:** Orange

- **Next Month:** Orange
- **Overdue:** Red
- **Obsolete:** Grey

The screenshot below shows how the **Review** column is rendered in the UI using the field customizer.

Review ▾	Name ▾	Next Review Date ▾
Unpublished	SLI-FM-001-OPS-MAINT Plant and Vehicle ...	
Overdue	SLI-FM-002-OPS-QA Audit Tool [Extensive]...	28/06/2025 12:00 AM
Next Week	SLI-FM-003-OPS-WHS Work Area Inspectio...	30/06/2025 12:00 AM
In Date	SLI-FM-004-OPS-QA QMS Audit Tool [Post ...	25/04/2026 2:27 PM
Next Month	SLI-FM-005-OPS-WHS Audit Tool [Post Cert...	17/07/2025 12:00 AM
Obsolete	SLI-FM-006-OPS-WHS Audit Tool [Post Cer...	25/04/2026 1:44 PM

The **Review** column is calculated column which contains a simple formula that returns a concatenated text value of other column values. In the example below, you can see that the formula uses the **Approval State** and **Next Review Date** columns.

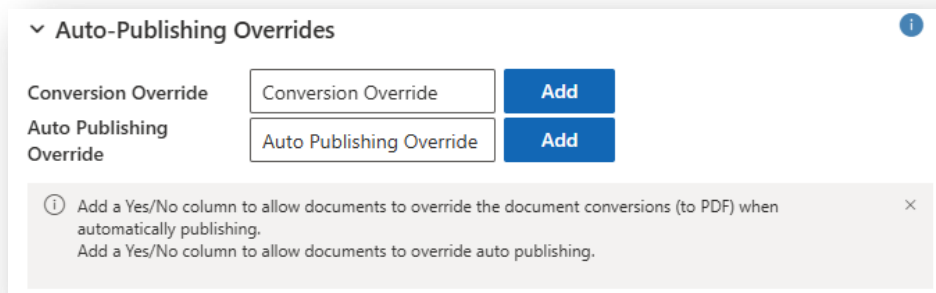
```
=CONCATENATE([Approval  
State],"|",[Next Review  
Date])
```

This formula includes the columns required by the field customizer. This is an optimisation technique to avoid the need to execute a separate query for each document item to retrieve the values necessary to render the status indicator.

Important

*The formula in the **Review** column must include references to the state and the review date columns used to render the status indicator by the field customizer. If you decide to change the column titles for these fields you will need to update the formula in the **Review** column accordingly as calculated columns work using column titles rather than field internal names.*

Auto-Publishing Overrides



▼ Auto-Publishing Overrides ⓘ

Conversion Override

Auto Publishing Override

ⓘ Add a Yes/No column to allow documents to override the document conversions (to PDF) when automatically publishing.
Add a Yes/No column to allow documents to override auto publishing. ✕

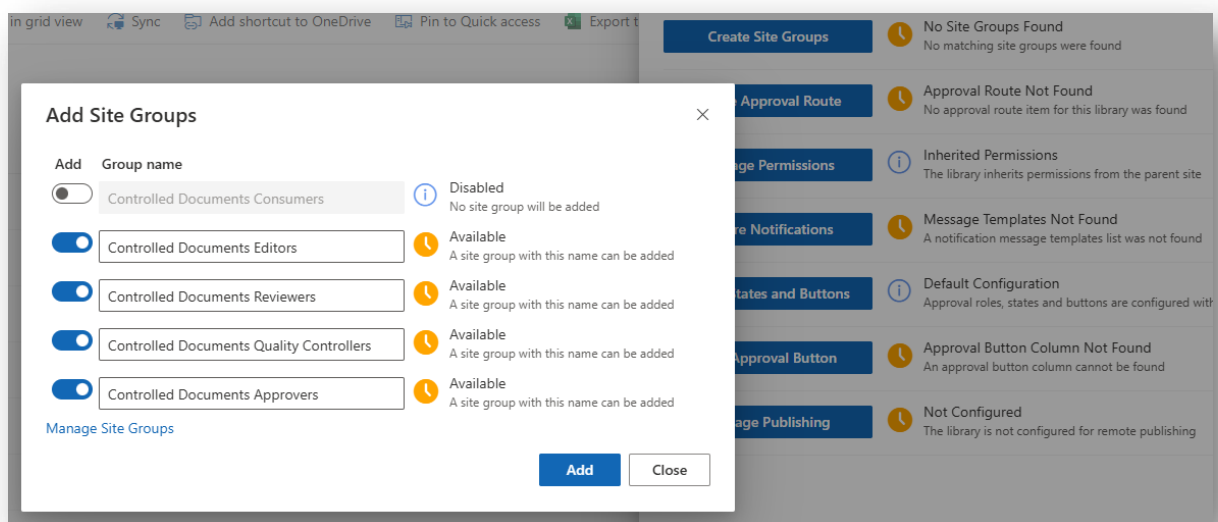
If you set up automatic publishing (usually for when a document is approved as a major version) you might want some specific documents not to be automatically published or to be published in their native file format rather than being converted to PDF, as exceptions to the general rule.

You can use these controls add additional Yes/No columns to the library which can be checked if the default publish behaviour should be overridden for the document.

Create/Manage Site Groups Button

It is not mandatory to use SharePoint Site Groups, but it is recommended best practice as this will allow role assignments to be made at the group level rather being assigned to individual user, which will make role assignments easier to manage when you need multiple **Approval Routes**.

Clicking the **Create Site Groups Button** will display the **Add Site Groups Dialog** as shown below.



in grid view Sync Add shortcut to OneDrive Pin to Quick access Export t

Add Site Groups ✕

Add	Group name	Status
<input type="radio"/>	Controlled Documents Consumers	Disabled No site group will be added
<input checked="" type="checkbox"/>	Controlled Documents Editors	Available A site group with this name can be added
<input checked="" type="checkbox"/>	Controlled Documents Reviewers	Available A site group with this name can be added
<input checked="" type="checkbox"/>	Controlled Documents Quality Controllers	Available A site group with this name can be added
<input checked="" type="checkbox"/>	Controlled Documents Approvers	Available A site group with this name can be added

[Manage Site Groups](#)

Create Site Groups ⓘ No Site Groups Found
No matching site groups were found

Approval Route ⓘ Approval Route Not Found
No approval route item for this library was found

Inherited Permissions ⓘ Inherited Permissions
The library inherits permissions from the parent site

Message Templates Not Found ⓘ Message Templates Not Found
A notification message templates list was not found

Default Configuration ⓘ Default Configuration
Approval roles, states and buttons are configured with

Approval Button Column Not Found ⓘ Approval Button Column Not Found
An approval button column cannot be found

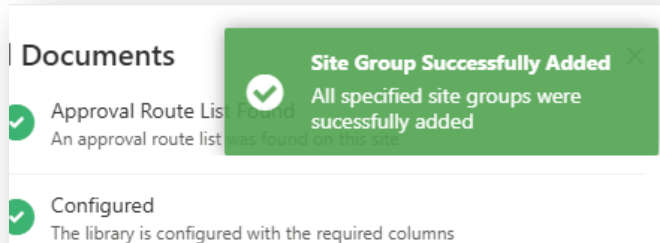
Not Configured ⓘ Not Configured
The library is not configured for remote publishing

The dialog can be used to create a new Site Group for each role and by the default, the library name will be used as a prefix to the role name (the library is called “Controlled Documents” in the above example).

By default the option to create a SharePoint Site Group for the **Consumer** role is disabled. In most cases it is envisaged that **Consumers** will access documents from a remote location through the

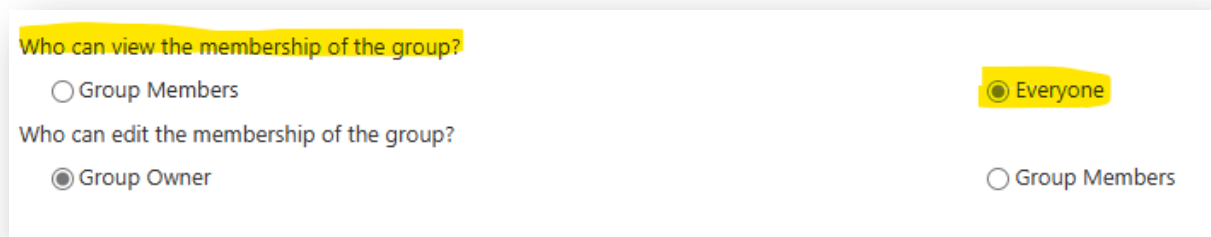
Remote Publishing and therefore a Site Group for this role is not generally required on the source site.

Click on the **Add** button, and the dialog will close and a few seconds later the UI report that the new Site Groups have been created.



This action could have been executed manually, using the standard SharePoint UI. The **Create Site Groups Button** just provides a simpler means of achieving the same outcome.

If you intend to use existing SharePoint Site Groups, or plan to create SharePoint Groups manually, great care must be taken to ensure that these groups are configured so that everyone can view group membership, as highlighted below.



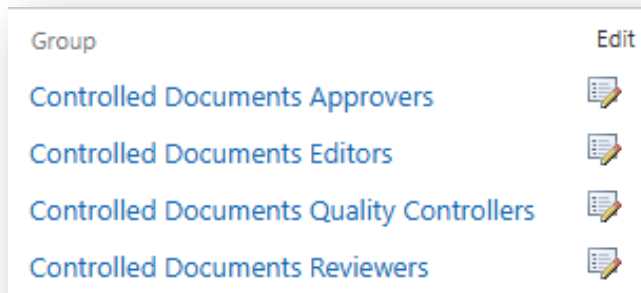
This is different to the default setting which configures the group so that only group members can view group membership.

Important

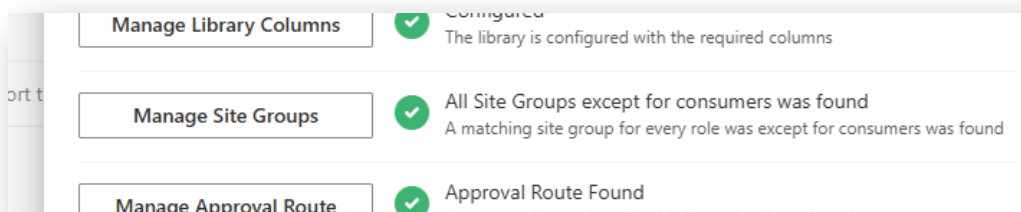
*If you do not configure the group so that **Everyone** can view group membership , the **Approval Route** data may fail to load and the **Approval Panel** may report that the **Approval Route** could not be found, as users must to be allowed to read group membership to determine who has been assigned to which roles.*

When you use the dialog to automatically provision Site Groups, all site users are granted membership-view permissions by default.

The screenshot below shows the new SharePoint Groups as listed in the standard SharePoint UI.

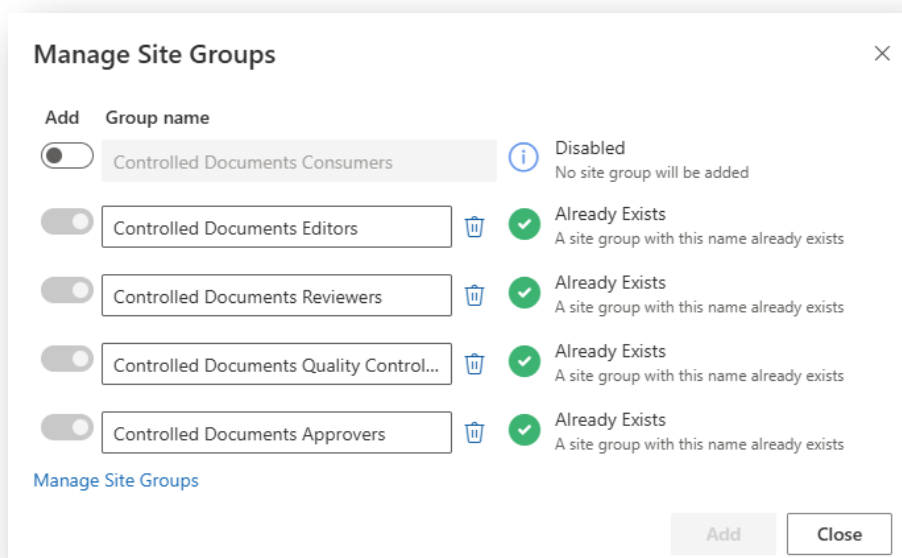


If the system detects that matching Site Groups already exist the **Create Site Groups Button** will be replaced with a **Managed Site Groups Button** as shown below.



As can be seen, the text displayed next to the button reports the status information, in this case that a matching Site Group for every role was found, with the exception of the **Consumer** role.

You can click the **Manage Site Groups Button** at any time to add any missing Site Groups or to delete existing ones.

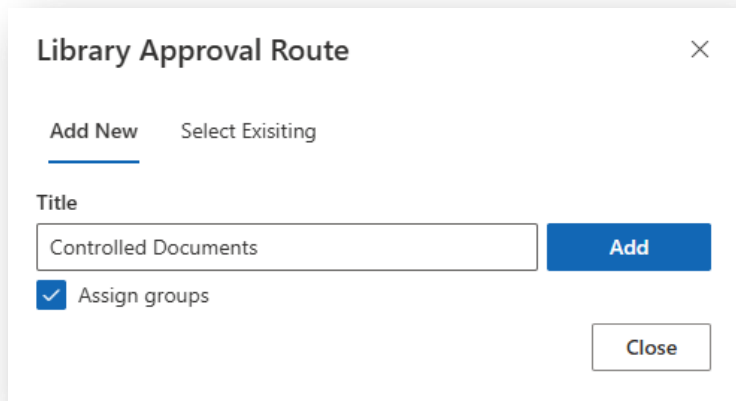


Alternatively, Site Groups can be managed using the standard SharePoint UI, noting that stakeholders in the approval process must have been granted the permission to read group membership as called out above.

Create/Manage Approval Route Button

Now that we have created an **Approval Routes List** and have some SharePoint Site Groups, we can use the **Create Approval Route Button** to add an **Approval Route** item for the library.

Clicking on the **Create Approval Route Button** will display the **Library Approval Route Dialog** as shown below.

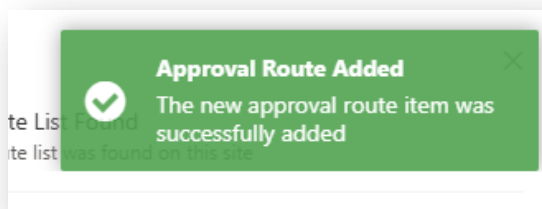


The dialog is titled "Library Approval Route" and has a close button (X) in the top right corner. It features two tabs: "Add New" (selected) and "Select Existing". Under the "Add New" tab, there is a "Title" label above a text input field containing "Controlled Documents". To the right of the input field is a blue "Add" button. Below the input field is a checked checkbox labeled "Assign groups". At the bottom right of the dialog is a "Close" button.

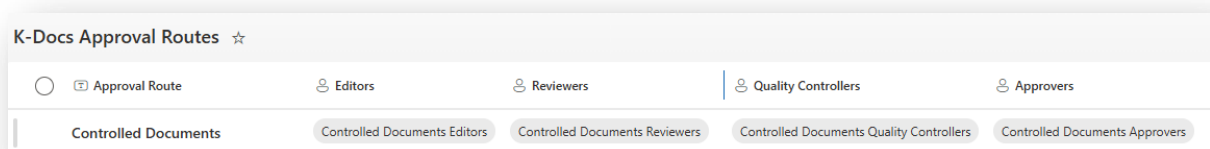
From the dialog, click the **Add** button to create a new **Approval Route** list item with a name that matches the value in the dialog's **Title** text control. The default title value will be the library name.

If you want to automatically assign the Site Groups to their corresponding roles, ensure that the **Assign Groups Checkbox** is checked.

After clicking the **Add** button, a new **Approval Route** item will be created, the dialog is closed, and a success notification message is displayed in the UI as below.



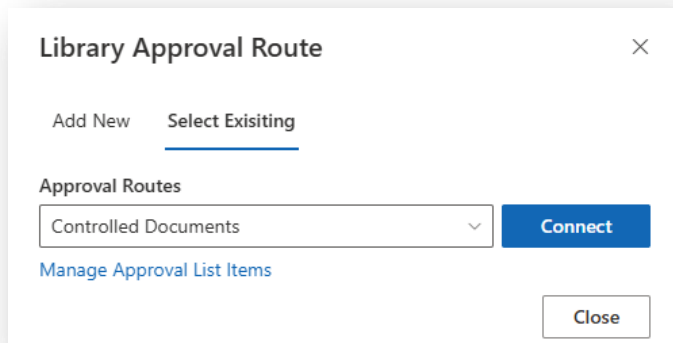
If you check the content of the **Approval Routes List** you will see that a new **Approval Route** item has been added and the, if the **Assign Groups Checkbox** was checked, the relevant Site Groups are assigned to the corresponding role columns, as shown below.



The screenshot shows the "K-Docs Approval Routes" list view. The table has five columns: "Approval Route", "Editors", "Reviewers", "Quality Controllers", and "Approvers". The first row contains the text "Controlled Documents" in the "Approval Route" column, and "Controlled Documents Editors", "Controlled Documents Reviewers", "Controlled Documents Quality Controllers", and "Controlled Documents Approvers" in the respective role columns.

Approval Route	Editors	Reviewers	Quality Controllers	Approvers
Controlled Documents	Controlled Documents Editors	Controlled Documents Reviewers	Controlled Documents Quality Controllers	Controlled Documents Approvers

As an alternative to creating a new **Approval Route Item**, you could have selected the **Select Existing Tab** in the dialog and chosen to connect the library to an existing **Approval Route** if an appropriate item already exists.



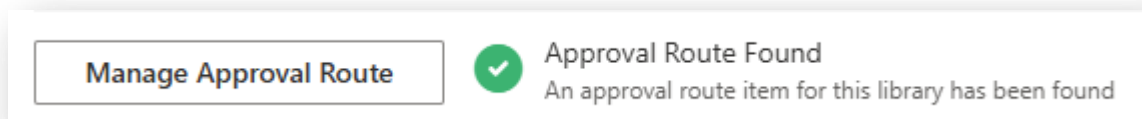
The dialog box is titled "Library Approval Route" and has a close button (X) in the top right corner. It features two tabs: "Add New" and "Select Existing", with the latter being the active tab. Below the tabs, there is a section labeled "Approval Routes" containing a dropdown menu with "Controlled Documents" selected. To the right of the dropdown is a blue "Connect" button. Below the dropdown is a blue link labeled "Manage Approval List Items". At the bottom right is a "Close" button.

The drop down control will list all **Approval Route Items** in the list.

The **Manage Approval List Items Link** simply provides quick access to the **Approval Routes** list in a separate browser tab and is provided for convenience only.

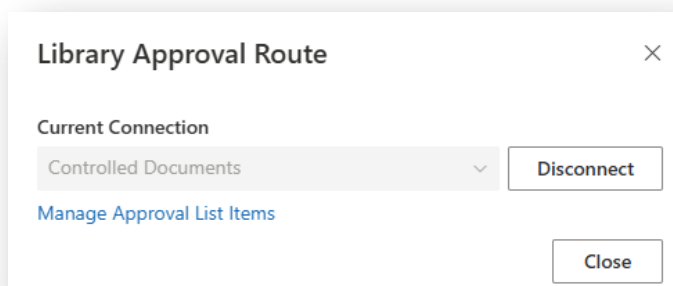
It is entirely possible to reuse the same **Approval Route Item** in multiple locations in library folder for example and in different libraries or folders within the same site.

When the library is connected with an **Approval Route Item**, the **Create Approval Route Button** is replaced by the **Manage Approval Route Button**.



A horizontal notification bar with a white background and a light gray border. On the left is a button labeled "Manage Approval Route". To its right is a green circular icon with a white checkmark. Further right is the text "Approval Route Found" followed by "An approval route item for this library has been found".

Click on the **Manage Approval Route Button** to access the **Library Approval Route Dialog** if you needed to disconnect a library from an **Approval Route Item** and connect it to a different one.



The dialog box is titled "Library Approval Route" and has a close button (X) in the top right corner. It features two tabs: "Current Connection" and "Manage Approval List Items", with the former being the active tab. Below the tabs, there is a section labeled "Current Connection" containing a dropdown menu with "Controlled Documents" selected. To the right of the dropdown is a "Disconnect" button. Below the dropdown is a blue link labeled "Manage Approval List Items". At the bottom right is a "Close" button.

To do that, simply click the **Disconnect Button**. The dialog will adapt and show both tabs once more.

Each **Approval Route Item** should have a unique title and so the dialog will initially report that the currently selected item title is already in use.

To create a new **Approval Route Item**, provide a unique title value in the text box and click the **Add Button**. Alternatively, switch to the **Select Existing** tab and connect the library to an existing **Approval Route Item** as described above.

Note the **Approvals Configuration Panel** does not provide controls that assign users to SharePoint Groups or to the role columns in **Approval Route Items** directly. This must be done using the standard SharePoint UI.

The use of SharePoint Groups is generally recommended in preference to assigning users directly as it allows user assignments to be managed from one place, the SharePoint Group, and so promotes reuse and greatly simplifies user permission management.

Important

*You cannot use Active Directory or M365 Groups to assign users to roles. Users must either be assigned directly to an **Approval Route Item** or assigned indirectly to a SharePoint Group which is added to the relevant role column for the **Approval Route Item**.*

It was a conscious design decision not to support AD or M365 Groups as:

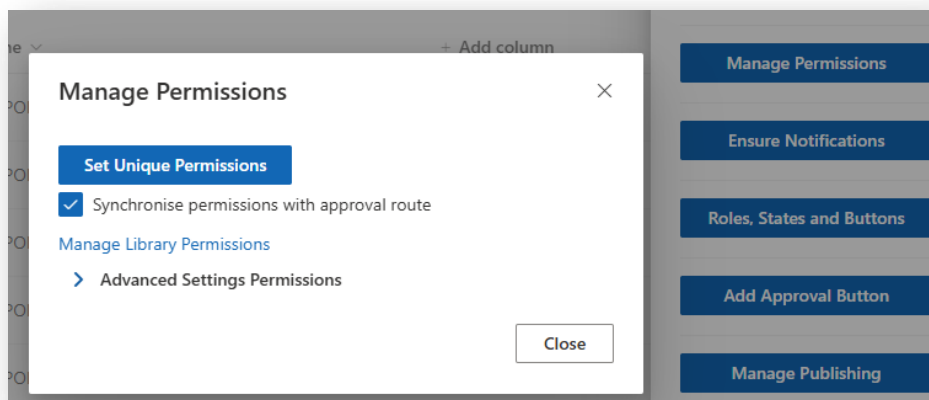
- It improves performance.
- It makes role assignments explicit and so easier to see which users are assigned to which roles.
- It avoids the necessity for the solution to use the Graph API which may require Global Administrator Approval.

Manage Permissions Button

The Manage Permissions Button is used to access the **Permissions Dialog**, which provides control to manage library-level permissions and synchronise those permissions with the connected Approval Route Item, and controls to make certain special functionality of the system available to users who have specific permissions.

Library Permissions and Synchronisation

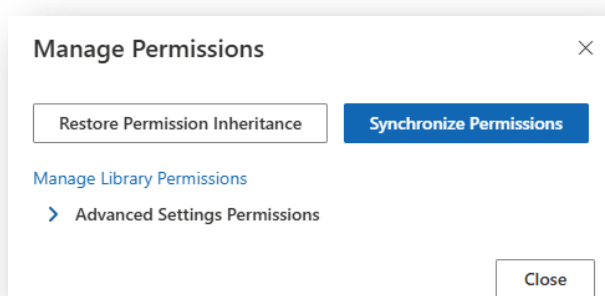
You can manage the permissions on the library using the standard SharePoint UI. Alternatively, you can configure library permissions from the **Permissions Dialog**.



Click the **Set Unique Permissions Button** to break the permission inheritance from the site. If you have checked the **Synchronise Permissions Checkbox**, any users and SharePoint Groups assigned to roles in the **Approval Route** item connected to the library will be assigned the appropriate permissions on the library, namely:

- **Consumers** are assigned the default **Read** Permission Level.
- **Editors, Reviewers and Quality Controllers** are assigned to the default **Contribute** Permission Level giving them read and write access on documents.
- **Approvers** are assigned the default **Design** Permission Level which includes the **Approve Items** permission, which is required in order to approve documents as a major version.

If permission inheritance is broken, the **Permissions Dialog** can be used to restore permission inheritance, if required by clicking the **Restore Permission Inheritance Button**.



You can use the **Synchronise Permissions Button** at any time, to synchronise the permissions on the library with the roles in the connected **Approval Route** Item.

If you assign users directly to **Approval Route** items, you will need to re-synchronise permissions every time you change role assignments, or else you run the risk that users assigned to roles will not have the necessary permissions required for them to act in that role.

However, if you use SharePoint Groups, in preference to individual role assignments, there should be no need to re-synchronise the permissions but rather you can control user permissions by their assignment to the appropriate SharePoint Group. This is a key reason why the use of SharePoint Groups is recommended.

The Manage Library Permissions Link

The **Manage Library Permissions Link** is provided as a convenience to quickly access the library permissions management page, should you wish to manage permissions using the standard SharePoint UI. The page opens in a new browser tab.

Advanced Settings Permissions

Click on the **Advanced Settings Permissions Section Header** to reveal permission assignment controls.

Each of these controls relates a different specialist management function of the system and by default the ability to access these functions is restricted to user who have full control (Owners) of the library.

These specialist functions are:

- **Obsolete:** The ability to flag a document as being obsolete.
- **Quick Publish:** The ability to step outside of the normal approval process and quickly publish a document as a major version. This can be useful when initially importing documents or when a minor correct is required but that change does not warrant a new full approval cycle.
- **Remote Publish:** The ability to remotely publish a document manually at any point in its approval cycle.
- **Keep Panel Open:** The ability to prevent the **Approval Panel** from closing and refreshing the page when a submit or reject action is executed by the user. This can be convenient when testing and evaluating the system.

- **Toggle Notifications:** The system will usually send targeted notification messages to stakeholders as the process advances. However, sometimes it is desirable to suppress those messages, when testing the system for example.

The UI of the **Approval Panel** will adapt to show controls that make the above functionality accessible based on the permissions of the user and the setting applied in the relevant permission assignment control.

Note access to the relevant functionality is based on the permissions of the user and not a role assignment but there is obviously some alignment between the two.

Each permission assignment control can be set to one of the following values:

- **Administrator:** The functionality is available to Site Collect Administrators only.
- **Owner:** The functionality is available to users who have full-control permissions on the document.
- **Approve:** The functionality is available to users who have permissions to approve the document as a major version.
- **Edit:** The functionality is available to users who have read and write access to the document.
- **Disabled:** The functionality is disabled for all users.

Note that functionality to Quick Publish a document requires approval permissions and so this function cannot be assigned to the **Edit** setting as users with this level of access to the document are unable to approve the document as a major version, as enforced by SharePoint.

Note also that the ability to **Remote Publish** a document is dependant on the user having the necessary permissions to add/update documents at the target location and these permission are not checked by the system.

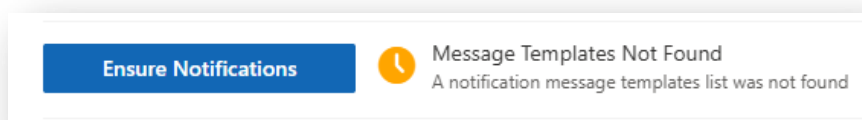
When making changes to these settings make sure to click the **Save Button** to ensure that the settings are saved.

Ensure Notifications Button

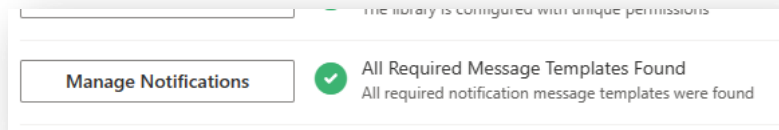
If you used a standard workflow to manage an approval cycle you would likely configure Power Automate to send out user notification emails to the next stakeholders in the process and you can do the same with **K-Docs Approve**.

K-Docs Message Templates List

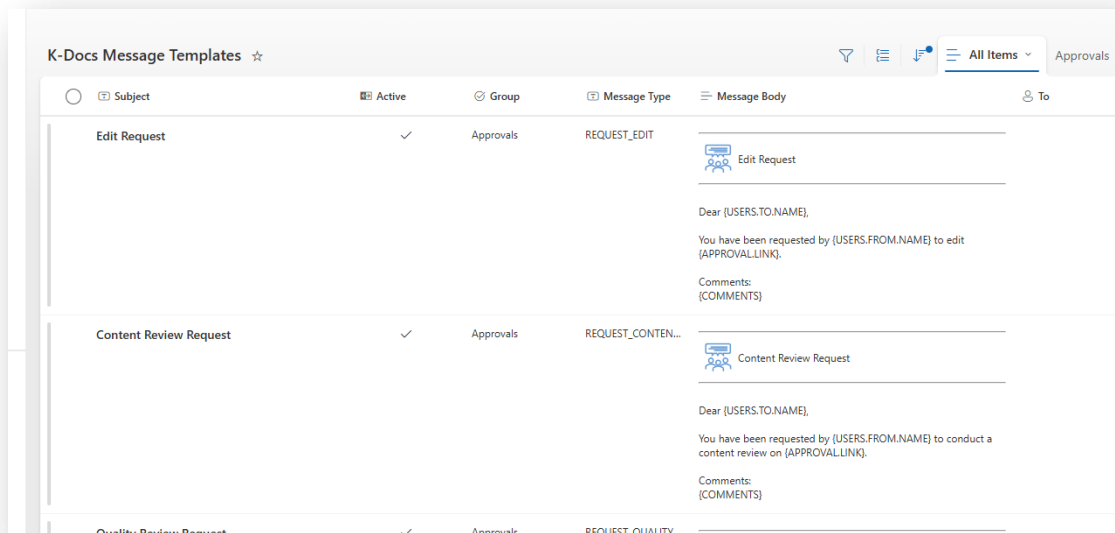
Notification emails sent out by **K-Docs Approve** are based on template lists items stored in a specially provisioned list called the **K-Docs Message Template List**. To enable notifications, you simply click on the **Ensure Notifications Button** to provision the **K-Docs Message Templates List**.



A few seconds later, a green pop-up message will notify you that the list was successfully provisioned, and the button will update and report that the list now exists in site and that all required notification message template items were found, as shown below.



Clicking on the **Manage Notifications Button** will open the **K-Docs Message Templates List** in a new browser tab.



The **K-Docs Message Templates List** is a shared list, meaning that it may be used by other Kaboodle Software solutions such as **K-Docs Acknowledge**.

As with the **Approval Routes List**, there is only one **K-Docs Message Templates List** required in the site and you can customise or localise the list as required. This includes renaming column titles and setting a custom list title and description as required.

Message Template Item Columns

The **K-Docs Message Templates List** is configured with the columns shown below.

Column (click to edit)	Type
Subject	Single line of text
Active	Yes/No
Group	Choice
Message Type	Single line of text
Message Body	Multiple lines of text
To	Person or Group
Cc	Person or Group
Bcc	Person or Group

- **Subject:** This is the standard title column which has been renamed and is used to specify the subject line header of the notification email.
- **Active:** A simple Yes/No flag to indicate whether the message is to be used. Any message template items where **Active** is set to **No**, will be ignored.
- **Group:** This is a choice column which can be assigned one of the following values:
 - **Approvals:** This is the value that is assigned to all 10 message templates used for **K-Docs Approve**.
 - **Change Requests:** This is the value used for message templates in the **K-Docs Change Requests** solution.
 - **Distribution:** This is the value used for message templates in the **K-Docs Acknowledge** solution.
 - **Hardcopy Management:** This is the value used for message templates in the **K-Docs Hardcopy** solution.
- **Message Type:** This is a single line text column that contains a constant text value, used by the system to identify the specific message type. Although the column is not shown in the item edit it might potentially be updated in grid edit mode but the data in this column should not be modified as the solution relies on the value to identify which message template should be used when generating notifications.
- **Message Body:** This is a multi-line text field that is used to define the body content of the email notification message. The column is configured to support rich text so images, hyperlinks and formatted text can all be used. The text in this field is converted to HTML in the email message body.
- **To, Cc and Bcc:** These are standard multi-value user columns and can be used to identify users who are always to be included when a message based on the template is sent. Only user principals with email addresses will be sent the notification message, which means that SharePoint Groups should not be used here but rather individual named users should be assigned to these columns. Note that these columns are used to specify additional email recipients. The next-in-line recipients, as defined in the **Approval List** Item will always be notified.

K-Docs Approve Message Template Items

For **K-Docs Approve** there are 10 message template items required for the solution to send out notification messages as intended:

- **Edit Request:** This can be initiated when the document is in a **Drafting** state and advances to the **Editing** state. **K-Docs Approve** can optionally be configured so that **Drafting** and **Editing** are considered as a single stage in the process, in which case the next logical state after **Drafting** would be **Content Review** rather than **Editing** and then this message would not be required.
- **Content Review Request:** Initiated by **Editors**, when the document is sent to **Reviewers** when they are requested to conduct a content reviewed.
- **Quality Review Request:** Initiated by **Content Reviewers** (or **Editors** if the **Content Review** step is not required) and sent to users assigned to the **Quality Controller** role when a document is submitted for quality review.
- **Request for Final Approval:** Initiated by **Quality Controllers** (or **Editors** or **Content Reviewers** if the **Content Review** or **Quality Control** steps are not required) and sent to users assigned

to the **Approver** role, requesting final approval for the release of the next major version of the document.

- **Content Review Approved:** Sent to the **Editor** who submitted the document to the **Reviewers**, when the content review of the document has been approved.
- **Quality Review Approved:** Sent to the user (Editor or Reviewer) who submitted the document to the **Quality Controllers**, when the quality control review of the document has been completed and approved.
- **Final Approval Request Approved:** Sent to all stakeholders involved the approval process when the document has achieved final approval from an **Approver**.
- **Content Review Rejected:** Sent to the **Editor** who submitted the document for a **Content Review**, but a **Reviewer** rejected the submission.
- **Quality Review Rejected:** Sent to the user who submitted a request for quality control approval, when that submission was by a **Quality Controller**.
- **Final Approval Rejected:** Sent to the user who submitted the request for final approval, when that submission was rejected by an Approver.

When a submission is rejected that from the **Approval Panel**, **Approvers** and **Quality Controllers** must choose which state they reject the approval to:

- **Approvers** can potentially reject a submission to **Quality Control**, **Content Review** or to **Editing**.
- **Quality Controllers** can potentially reject a submission to **Content Review** or **Editing**.
- **Reviewers** can only reject a submission back to **Editing**.

When a submission is rejected, all stakeholders involved in the process up to the target rejection state are included in the notification message.

For example, if an **Approver** rejects a submission back to **Editing** the **Quality Controller** and **Reviewer** would be including in the notification email as well as the **Editor**. However, if an **Approver** chose to reject the submission to **Content Review**, then the **Quality Controller** and the **Reviewer** would be notified but not the **Editor**.

Customising Notification Messages

With the exception of the **Group** and **Message Type** fields, any of the other columns can be edited so the notification messages can be branded and customised to the needs of your organisation.

Message Content Tokens

The **Subject** and **Message Body** columns can include placeholder tokens which get replaced with actual values when the email is send. The following tokens can be used:

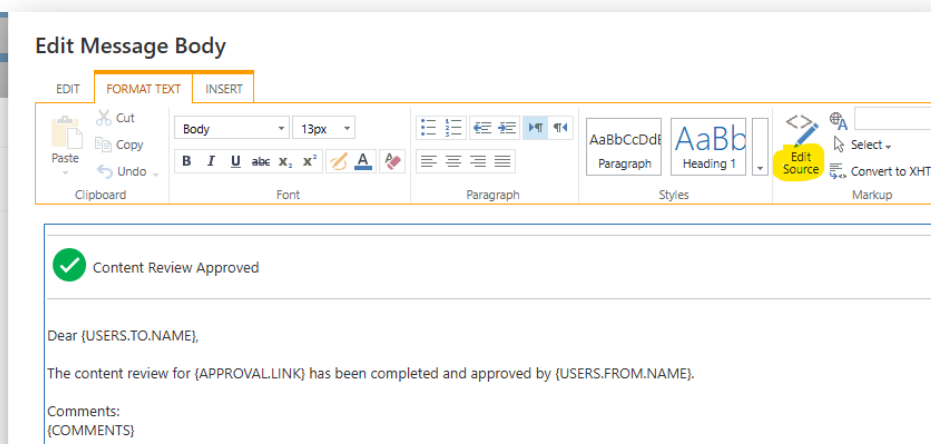
- **{DOCUMENT}**: The title of the document or the filename of the document without the file extension if the title value is not specified.
- **{DOCUMENT.LINK}**: A hyperlink to the document using the above {DOCUMENT} token for the link text.
- **{DOCUMENT.NAME}**: The filename of the document, without the file extension.
- **{DOCUMENT.NAME.LINK}**: A hyperlink to the document using the filename (minus extension) as the link text.
- **{DOCUMENT.TITLE}**: The title of the document.

- **{DOCUMENT.FILENAME}**: The full filename of the document, including file type extension.
- **{DOCUMENT.FILENAME.LINK}**: A hyperlink to the document using the above **{DOCUMENT.FILENAME}** token for the link text.
- **{DOCUMENT.URL}**: The URL of the document as plain text.
- **{DOCUMENT.URL.LINK}**: A hyperlink to the document.
- **{USERS.FROM.NAME}**: The title name of the user who interacted with the system so as to trigger the notification message.
- **{USERS.FROM.EMAIL}**: The email address of the user who interacted with the system so as to trigger the notification message.
- **{USERS.TO.NAME}**: A formatted text value which lists all users who were assigned as **To** recipients of the notification email.
- **{USERS.TO.EMAIL}**: A comma separated list off email addresses of users who were assigned as **To** recipients of the notification email.
- **{USERS.CC.NAME}**: A formatted text value which lists as users who were assigned as **CC** recipients of the notification email.
- **{USERS.CC.EMAIL}**: A comma separated list off email addresses of users who were assigned as **CC** recipients of the notification email.
- **{COMMENTS}**: Comment text which may have been provided by the user who initiated the notification message.
- **{APPROVAL.LINK}**: A hyperlink that will link to the source location of the document and automatically open the **Approval Panel**. The filename (including file extension) is used as the link text.

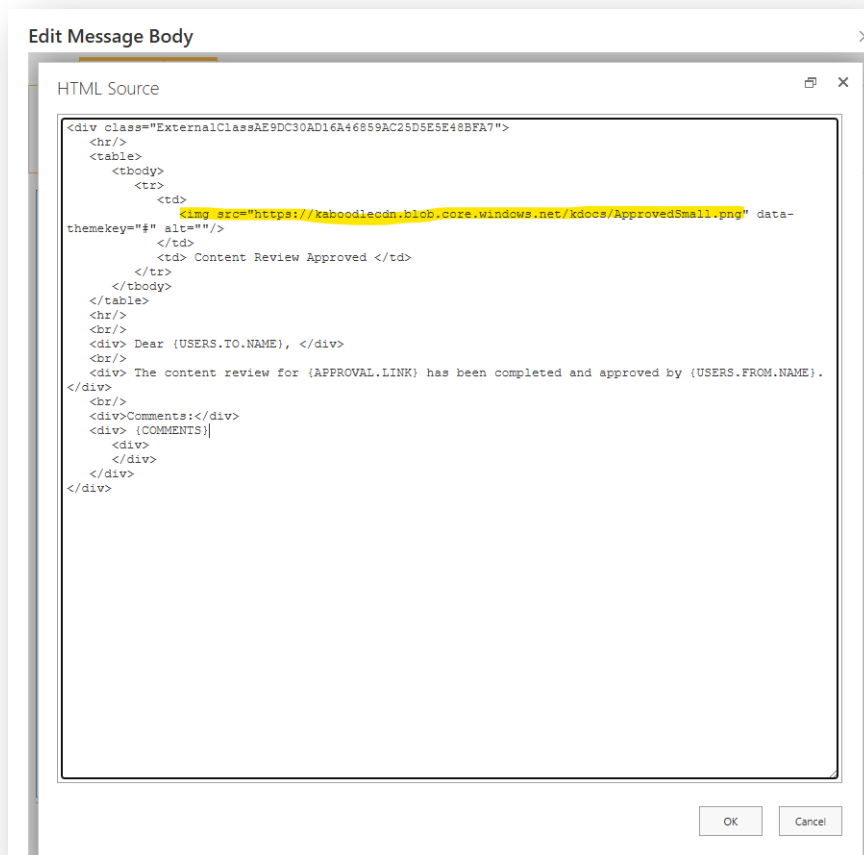
Note that all tokens must be placed with an open and closed brace character, and they must be capitalised.

Embedded Images

As can be seen that the **Message Body** column of the standard default messages include embedded graphics. These images are sources from the Kaboodle CDN and are simple image tags in the HTML for the Message Body column as can be viewed when accessing the source using the **Edit Source** button, as highlighted below.



Clicking this button will open the source HTML in a simple text dialog where the image tag and the source URL can be viewed.












In the above screenshot it can be seen that the image references an image hosted on the Kaboodle CDN.

However, if you intend to use custom images in these emails, we recommend that you do not reference images in this way but rather embed the image data as a base64 encoded string. This will ensure that the emails will always include the graphic. If you simply link to a graphic via a standard URL, it is possible that the user will not see the graphic but will be presented with a blank image placeholder and may be given the option to download the image.

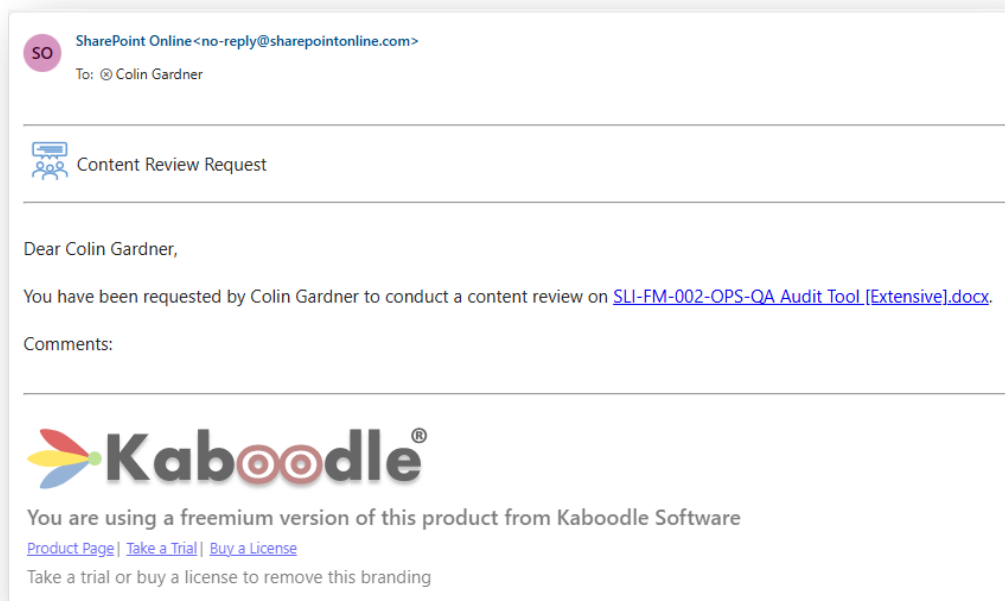
You can avoid this scenario if the images are base64 encoded. How to convert a graphic to a base64 data string is beyond the scope of this document but there are many references on the Internet. Our tool of choice is <https://www.base64-image.de/> but there are several other online tools which can be used.

We work around this issue when using standard emails because we replace the URL with Base64 encoded data programmatically. This will happen whenever you use our standard images from the CDN endpoint: <https://kaboodlecdn.blob.core.windows.net/kdocs/> and append one of the file names to construct the required URL:

Name
 Approved.png
 Approved.svg
 ApprovedSmall.png
 Rejected.png
 Rejected.svg
 RejectedSmall.png
 Request.png
 Request.svg
 RequestSmall.png

Freemium Branding

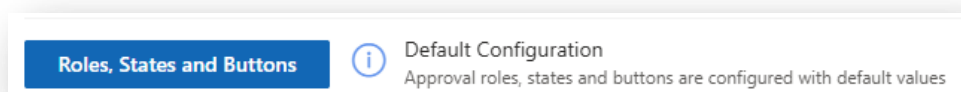
If you use an unlicensed Freemium version of **K-Docs Approve**, a Kaboodle Software branded footer is appended to all emails, as shown in the example below:



The Kaboodle Software footer is not appended for licensed versions of the **K-Docs Approve**.

Roles, States and Buttons

This capability is only available for users of a licensed product. If you are using the Freemium product the **Roles, States and Buttons** will be disabled.



Click on the button and the **Roles, States and Buttons Dialog** will be displayed as shown below.

Roles, States and Buttons

Use these controls to set custom titles for states and roles that may be more relevant to the approval process context

Panel Title * Approvals The title text displayed in the approval panel

Document Mode App or Browser Select how documents can be opened from within the approval panel

Published Title * Published The Approvals Button text for published documents

Obsolete Title * Obsolete The Approvals Button text for obsolete documents

Next Review Title * Pending Next Review The state text value for published documents

Drafting Title * Drafting The state text value for an unpublished document that has yet to start an approval cycle

Next Approval Button Start next approval Click to configure button properties to start the next approval cycle

Final Approval Button Final Approval Click to configure button properties for the final approval action

Icons Hide Display or hide button icons

Treat Draft as Edit Enabled Treat drafts as Edit and bypass Editors

	Role Name *	State Name *	Button Preview
Edit	Editors	Editing	Send to Editors
Content	Content Reviewers	Content Review	Send to Content Review
Quality	Quality Controllers	Quality Control	Sent to Quality Controls
Approval	Approvers	Final Approval	Submit for Final Approval

Reset Save Cancel

You can use the controls in this dialog to customise state and role names, and text displayed in the UI.

Panel Title Textbox

Use this control to set a custom text value to be displayed in the header of the **Approvals Panel**. The default value is “Approvals”, as shown above but the screenshot below shows a customised value “Controlled Document Approvals” used as the panel header text.

Controlled Document Approvals

SLI-FM-002-OPS-QA Audit Tool [Extensive].docx
Version: 1.2 Updated 28 June 2025, 3:19 pm

Current State: Content Review
Current Status: Pending
Approval Route: Operations

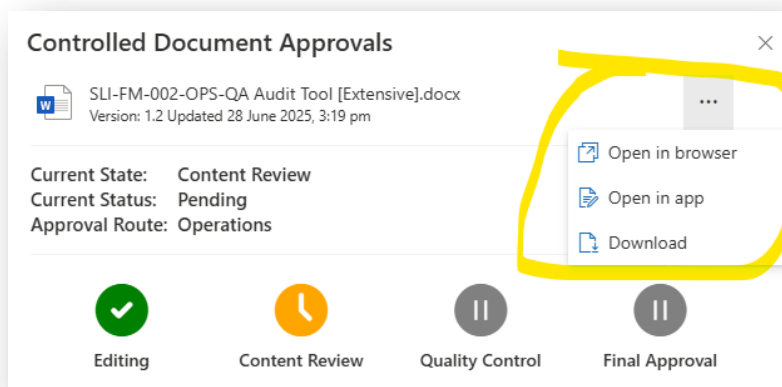
Editing Content Review Quality Control Final Approval

Document Mode Picker

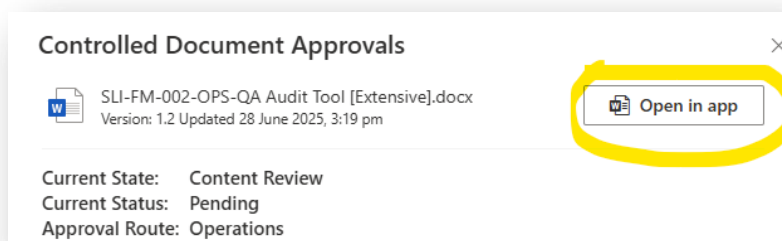
Documents can optionally be accessed from the **Approval Panel** via a **Document Control** displayed directly below the panel header.

By default this property is set to **App or Browser**, but it can be set to one of the following values:

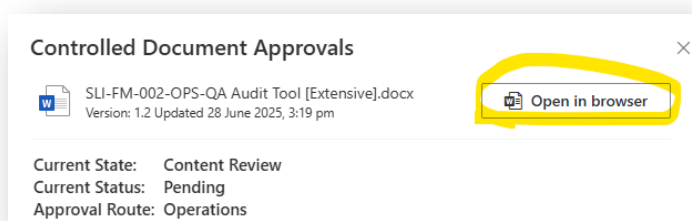
- **App or Browser:** An ellipsis button is displayed next to the Document control which allows users to
 - Open the document in a browser tab
 - In the appropriate client application
 - Download the document



- **App Only:** The **Open in App Button** is displayed in the **Document Control**



- **Browser Only:** The Open in Browser Button is displayed



- **None:** The **Document Control** is displayed but does not provide a means to access the document from the **Approval Panel**.

— **Hide:** The **Document Control** is not displayed.

Published Title

This text is displayed in the **Approvals Button** for documents which are currently at an approved major version. By default the value is “Published” as highlighted below.

Review ▾	Name ▾	Approvals Button ▾
In Date	SLI-FM-002-OPS-QA Audit Tool [Extensive]....	Content Review
In Date	SLI-FM-003-OPS-WHS Work Area Inspectio...	Published
In Date	SLI-FM-004-OPS-QA QMS Audit Tool [Extensive]....	Content Review

But this text value might be changed to any value better aligned with you business processes. In the example below it has been changed to “Approved”.

Roles, States and Buttons

Use these controls to set custom titles for states and roles that may be more relevant to the approval process context

Panel Title * The title text displayed in the approval panel

Document Mode Select how documents can be opened from within the approval panel

Published Title * The Approvals Button text for published documents

Obsolete Title * The Approvals Button text for obsolete documents

Review ▾	Name ▾	Approvals Button ▾
In Date	SLI-FM-002-OPS-QA Audit Tool [Extensive]....	Content Review
In Date	SLI-FM-003-OPS-WHS Work Area Inspectio...	Approved
In Date	SLI-FM-004-OPS-QA QMS Audit Tool [Extensive]....	Content Review

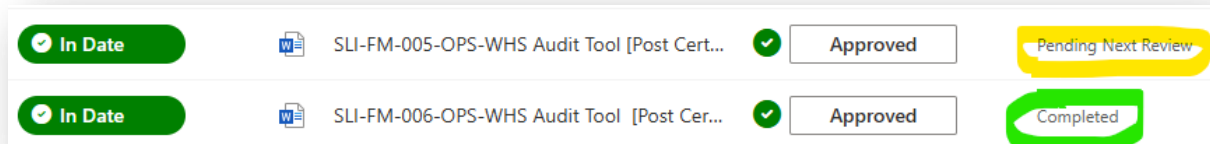
Obsolete Title

Much like the **Published Title** value, the **Obsolete Title** can be value customised to any value which may be more appropriate to your process. By default the value “Obsolete” is used, but the screenshot below shows when a custom value “Pending Archive” has been configured.

Obsolete	SLI-FM-006-OPS-WHS Audit Tool [Post Cer...	Pending Archive
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Next Review Title

You can set a custom state value for when a document is published and is conceptually pending a subsequent review cycle. The default value is **Pending Next Review** but in the screenshot below this state value has been changed to “Completed”



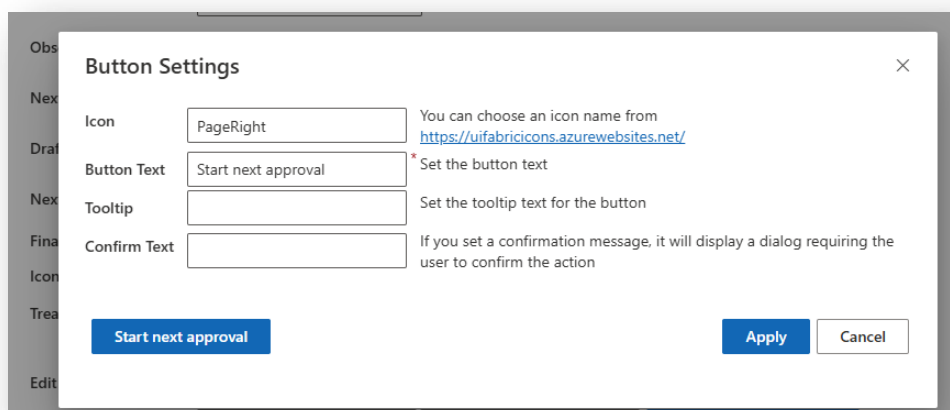
The above screenshot highlights an important factor to be considered when setting custom state values and that is that they will only be applied when the document next enter that state. In the above example, the document highlighted in yellow has not been updated to “Completed” that will only happen when the document is next approved.

Drafting Title

A custom value can be set for the **Drafting** state but once again it should be noted that this value is only applied when document next enters that state.

Next Approval Button

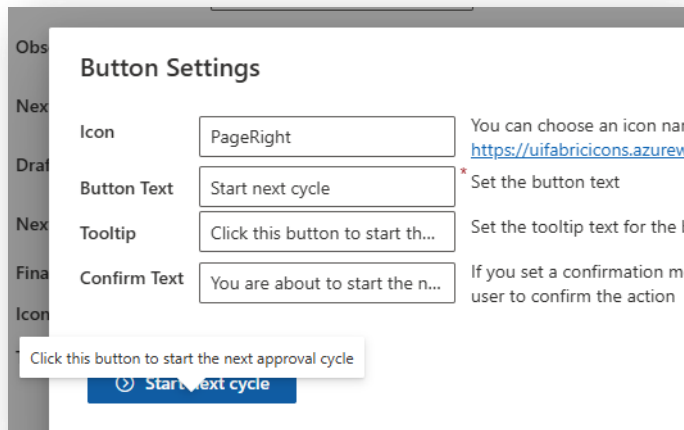
When a document is published as a major approved version, a button appears in the Approval Panel which can be used to start the document on its next approval cycle. This button can be customised by clicking the preview button in the dialog which will display an auxiliary **Button Settings Dialog** which allows button properties to be set, as shown below.



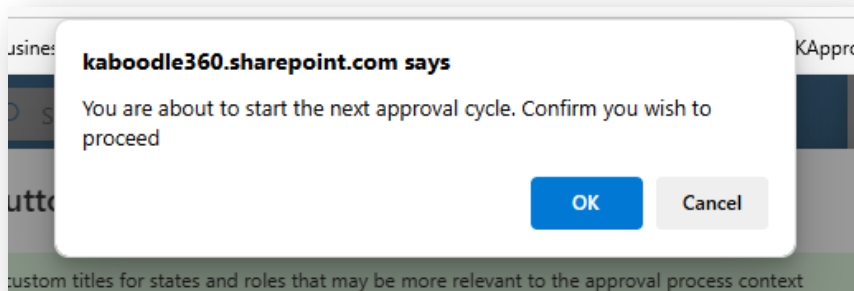
You can use the controls in the **Button Settings Dialog** to:

- Specify a button icon. Please refer to the Office UI Fabric Icons page to review that extensive set of button icons that can be used <https://uifabricicons.azurewebsites.net/>. Note that by default the **PageNext** icon is specified but no icon is rendered in the button because Icons Toggle in the **Roles, States and Buttons Dialog** is set to **Hide** by default. If you enable icons and then access the **Button Settings Dialog** once more, the icon will be displayed.

- Set a custom value for the button text
- Set a tooltip value
- Set a **Confirm Text** value



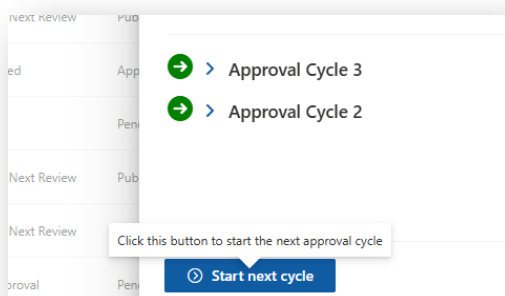
If a **Confirm Text** value is set, the user will be presented with a confirm message before the action is executed, providing the option to set a final check in the process.



When the button is configured as requires click the **Apply Button** to preserve the settings or the **Cancel Button** to revert the previous values.

Note that the settings are not committed until the **Save Button** is clicked in the **Button Settings Dialog**.

The screenshot below shows the customised button as it appears in the **Approvals Panel**.



Final Approval Button

As with the **Next Approval Button** the **Final Approval Button** can be customised as required.

The 'Button Settings' dialog box contains the following fields and instructions:

- Icon:** A text input field containing 'Send'. To the right, it says: 'You can choose an icon name from <https://uifabricicons.azurewebsites.net/>'.
- Button Text:** A text input field containing 'Publish It!'. To the right, it says: '* Set the button text'.
- Tooltip:** A text input field containing 'Publish this document as n...'. To the right, it says: 'Set the tooltip text for the button'.
- Confirm Text:** An empty text input field. To the right, it says: 'If you set a confirmation message, it will display a dialog requiring the user to confirm the action'.

At the bottom, there is a blue button with a right-pointing arrow and the text 'Publish It!', and two buttons on the right: 'Apply' and 'Cancel'.

The 'Approval Cycle 4' card displays the following information:

- A clock icon and a dropdown arrow next to the title 'Approval Cycle 4'.
- A user profile icon and the text: 'Colin Gardner: Completed Drafting v 3.4'.
- The date and time: '26 Apr 2025, 2:53 pm'.
- At the bottom, there is a blue button with a right-pointing arrow and the text 'Publish It!', and a grey button with a red 'X' icon and the text 'Reject' followed by a dropdown arrow.

Icons Toggle

Use this control to show or hide button icons.

The 'Icons' toggle control consists of the label 'Icons' on the left, a blue toggle switch in the middle (which is currently turned on), and the label 'Show' on the right.

If you want some buttons to have icons and the others to be displayed without an icon, set the toggle to **Show** but do not set an icon name for the button.

Treat Draft as Edit Toggle

The 'Treat Draft as Edit' toggle control consists of the label 'Treat Draft as Edit' on the left, a blue toggle switch in the middle (which is currently turned on), and the label 'Enabled' on the right.

This may be a small control, but it can have a significant impact on the execution of the approval process.

When **Enabled** (the default setting), the **Drafting** and **Editing** states are combined into a single action step to advance the process to the next logical state. So, if the next logical step, after **Drafting** and **Editing** is to submit the document for **Content Review** the button to advance the process to that state will be displayed when the document is in either the **Drafting** or **Editing** state.

If this setting is **Disabled**, **Drafting** and **Editing** states are treated as separate discrete states. In this case, if the next logical state after **Drafting** is **Editing** the document must first be explicitly sent to the **Editing** state, you will not be able to submit to **Content Review** directly from **Drafting**.

Customisations for roles and states and next step buttons

At the bottom of the **Roles, States and Buttons Dialog** there is a table of controls that can be used to customise the role names, the corresponding state name and the step action buttons used to progress the process to the next state

	Role Name *	State Name *	Button Preview
Edit	<input type="text" value="Editors"/>	<input type="text" value="Editing"/>	<input type="button" value="Send to Editors"/> ↺
Content	<input type="text" value="Content Reviewers"/>	<input type="text" value="Content Review"/>	<input type="button" value="Send to Content Review"/> ↺
Quality	<input type="text" value="Quality Controllers"/>	<input type="text" value="Quality Control"/>	<input type="button" value="Sent to Quality Controls"/> ↺
Approval	<input type="text" value="Approvers"/>	<input type="text" value="Final Approval"/>	<input type="button" value="Submit for Final Approval"/> ↺

You can use these controls to completely customise the system so that it can be perfectly aligned with your approval processes using language and terminology that may be more familiar to end users.

Changing role names and button settings will result in an immediate change in the UI and the new state value will be applied when the document next enters that state

	Role Name *	State Name *	Button Preview
Edit	<input type="text" value="Editors"/>	<input type="text" value="Editing"/>	<input type="button" value="Send to Editors"/> ↺
Content	<input type="text" value="Content Checkers"/>	<input type="text" value="Content Check"/>	<input type="button" value="Send to Checkers"/> ↺
Quality	<input type="text" value="Quality Controllers"/>	<input type="text" value="Quality Control"/>	<input type="button" value="Sent to Quality Controls"/> ↺
Approval	<input type="text" value="Approvers"/>	<input type="text" value="Final Approval"/>	<input type="button" value="Submit for Final Approval"/> ↺

For example, if the role name for Content were changed to “Content Checkers” instead of the default “Content Reviewers” and the button were similarly update, the **Approval Panel** will immediately update to reflect these changes.

Reset Buttons

The **Roles, States and Buttons Dialog** provides several revert buttons which provides an easy way for controls to be reset to their default values.

Clicking the **Reset Button** in the dialog footer will cause all controls and properties to be reset to the default values.

	Role Name *	State Name *	Button Preview
Edit	Editors	Editing	Send to Editors ↺
Content	Content Reviewers	Content Review	Send to Content Review ↺
Quality	Quality Controllers	Quality Control	Send to Quality Controls ↺
Approval	Approvers	Final Approval	Submit for Final Approval ↺

However, you must then click the **Save Button** to apply those changes so that they persist.

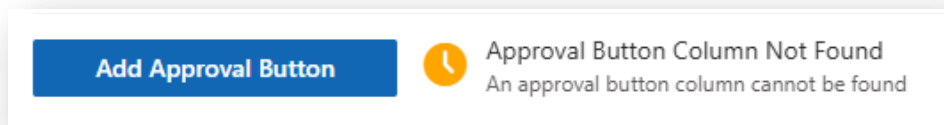
Finally, remember that if you update state names, documents will not be updated dynamically, documents which are tagged with the old state name will continue to be so until they transition to a new state.

Add Approval Button

The **Approval Panel** is accessed by users so that they can interact with the system to submit, approve or reject items and add comments. The **Approval Panel** is described in detail in the next section of this document and so will not be presented here, but access to the **Approval Panel** can be made easier by adding an **Approvals Button Column** to the library.

Adding the Approvals Button Column

Just click the **Add Approval Button** in the **Approvals Configuration Panel**.



After a few seconds, an interactive message will inform you that the **Approvals Button** column has been added.

Behind the scenes, the **Approvals Button** column is a simple calculated column which returns the value of the state column. As with the **Review** column, which is rendered as a status indicator for when the document is next due for review, this is an optimisation technique to improve the performance of the field customizer.



Important

*If you chose to customise the solution by changing the title of the **Approval State** column you must also update the formula in the **Approvals Button** column so that returns the state value. This is because calculated columns work using column titles and not field internal names*

The **Approvals Button** column is not added to any views on the library, you must update the views manually to include the button where it is can be conveniently accessed by users.

The Approvals Button column for Document Items

The screenshot below shows an example library, configured with **Approval Button** column as the 3rd column in the view for document items.

Review ▾	Name ▾	Approvals Button ▾
Unpublished	SLI-FM-001-OPS-MAINT Plant and Vehicle ...	Not Published
Overdue	SLI-FM-002-OPS-QA Audit Tool [Extensive]...	Content Review
Next Week	SLI-FM-003-OPS-WHS Work Area Inspectio...	Drafting
In Date	SLI-FM-004-OPS-QA QMS Audit Tool [Post ...	Content Review
Next Month	SLI-FM-005-OPS-WHS Audit Tool [Post Cert...	Drafting
Obsolete	SLI-FM-006-OPS-WHS Audit Tool [Post Cer...	Obsolete
In Date	SLI-FM-006-OPS-WHS Risk Matrix.docx	Not Published
In Date	SLI-FM-007-OPS-WHS Fatigue Impairment ...	Published
In Date	SLI-POL-001-OPS-QA Quality Management...	Published

As can be seen, the button column shows a button with text indicating the current state value and an icon indicating the current step status. You can use the button column to review the current step and status of all your documents, at a glance. Clicking on the button will open the **Approval Panel** for the document (see the next section).

The Approvals Button for Folders

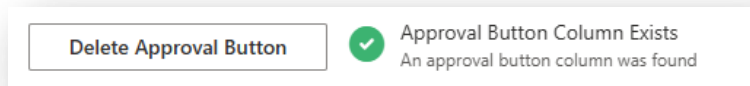
When viewing folders, the **Approvals Button** column is used to indicate whether the folder has been configured with a specific **Approval Route Item**, or if it inherits the **Approval Route Item** from a parent folder or from the library.

K-Docs Approvals ▾	
Approvals Button ▾	Name ▾
Unique Approvals	Finance
Inherits Approvals	HR
Inherits Approvals	Logistics
Inherits Approvals	Operations
Inherits Approvals	Quality
Inherits Approvals	WHS

Clicking the button for a folder will display the **Assign Folder Approval Route Dialog** which is used to connect an **Approval Route** item to a specific folder. The use of the **Assign Folder Approval Route Dialog** is detailed later in this document.

Deleting the Approval Button Column

If you decide that the **Approval Button** column is no longer required you can use the **Delete Approval Button** in the **Configuration Panel** to delete it from the library.



Alternatively you can simply delete the column using the standard SharePoint UI.

You can always add the column back later, but you will need to use the **Add Approval Button** to do so in order for the solution to register the field customizer with the column.

If you do not use the **Approval Button** column you can still access the **Approval Panel** using the SharePoint Command Bar or edit menu, but we recommend using the **Approval Button** column as it results in a more obvious and intuitive user experience.

Manage Publishing Button

Often, organisations prefer to separate the location in which approval cycles are managed from where the documents are accessed by consuming users. This means that the system logically consists of 2 distinct spaces:

- **Below the Line:** This is the space in which source documents (usually in MS Office format) are managed. Access to this space (usually a SharePoint Team Site) can be tightly controlled so that the source libraries are only accessible to stakeholders in the approval process.
- **Above the Line:** This is space in which copies of source documents (often in PDF) are accessed by consuming users, from an Intranet Portal site or some other SharePoint site that is more widely accessible to users, in a read-only capacity.

Whilst this approach might seem to contravene the Nirvana of good information management i.e., having a single source of truth, it is argued that the above-the-line documents are not uncontrolled copies of the source document but rather they are managed copies. These managed copies are often rendered in a different format such as wiki web page or PDF and hence we call them **Renditions**, rather than copies.

When organisations choose this model, there needs to be a formal and structured way in which **Renditions** are generated and published to the appropriate target locations. This can be done manually of course, and many smaller organisations do just that; they:

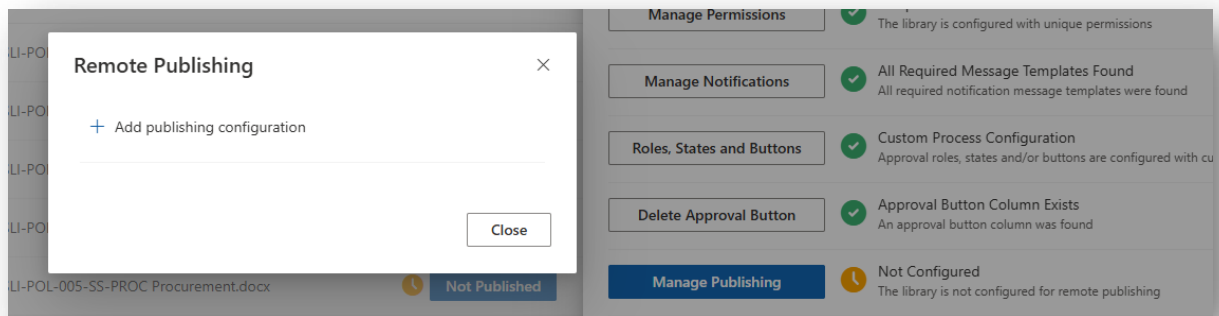
- Download a copy of approved Word document from the below-the-line location.
- Save a **Rendition** locally, as a PDF.
- Upload the PDF to the above-the-line locations, taking care to replace any pre-existing version and updating metadata values as required.

Whilst this approach works, it is a very manual and somewhat tiresome process which is prone to human error.

Other organisations use workflows to automate the process, and this works well but it does require someone to design, configure and manage the workflows and converting documents to PDF is not as straightforward as it should be, unless you are prepared to pay extra for a 3rd party product.

K-Docs Approve provides a solution that is easy to set up and use and which does not require a workflow or additional software.

To set up a target publishing location for the library, click the **Manage Publishing Button**, which will display the **Remote Publishing Dialog** as shown below:



Click the **Add Publishing Configuration** action button and a set of controls will be displayed which allows you to set up a **Publishing Location**.

The image shows a screenshot of the 'Remote Publishing' dialog box. It has a title bar 'Remote Publishing' and a close button. The dialog is divided into several sections:

- Title ***: A text field containing 'Document Registry'.
- Description**: A text area containing 'Publish the document to the Document Registry as a PDF rendition'.
- Publishing Mode**: A dropdown menu set to 'On Approved Major Version'.
- Select Site**: A dropdown menu set to 'Document Registry'.
- Select Library**: A dropdown menu set to 'Registry'.
- Select Library/Folder**: A section with a 'Select a folder' label and a folder icon.
- Conversion Mode**: A dropdown menu set to 'PDF'.
- Filename Append**: A dropdown menu set to 'None'.
- Property Mapping**: A dropdown menu set to 'Auto'.
- Checkboxes**: Four checkboxes are checked: 'Publish at target location', 'Approve at target location', 'Map Content Type', and 'Overwrite as new version'.
- Buttons**: 'Delete' and 'Save' buttons are at the bottom right.
- + Add publishing configuration**: A button at the bottom left.

- **Title Textbox:** The title textbox is the top-most control and allows you to specify a name for the publishing location (Company Intranet for example). This is a mandatory property and so you must provide a title value before the **Save** button will light up, allowing you to save the configuration.
- **Description Textbox:** This is an optional field, but we recommend using it to provide a description of the publishing location. This value is shown to users as a tooltip.
- **Publishing Mode Picker:** This control is used to specify when documents are to be published to the target location and can be set to one of the following values:
 - **On Approved Major Version:** This is the default value and is used when you want a **Rendition** to be automatically published to the target location when it is approved as a major version.
 - **On Every Step Change:** This value will trigger the publication process whenever the document transitions to a new state in the approval process.
 - **Manual:** When this value is selected, the document is never published automatically but it can be manually published from the **Approvals Panel**.
 - **Disabled:** The configuration is not used but is still saved as part of the configuration.
- **Select Site Picker:** This control allows you to select a target site for the publishing location. If you do not select a remote location, the current site will be assumed.
- **Select Library Picker:** This control will list the document libraries in the selected site and is used to specify the target library.
- **Select Library/Folder Picker:** This control will allow you to select a target folder location within the selected library. If you do not select a specific folder location the document will be published to the root folder in the library.
- **Conversion Mode Picker:** This can be set to one of 2 values:
 - **None:** This is the default value and is used when you want the **Rendition** to be published in the same format as the source file.
 - **PDF:** This should be specified when you want the **Rendition** to be published as a PDF.
- **Filename Append:** Usually you will want a remotely published document to replace any existing documents at that location (with the same file name). However, there may be special circumstances in which you want the document to be published as a separate document and not override any preexisting renditions. To achieve this, you can specify a file name append mode:
 - **None:** This is the default value where the target filename is the same as the source filename (less file extension if the rendition is being converted to PDF).
 - **Version:** The version number of the source document is appended to filename of the target rendition.
 - **Date:** The current date (in ISO format) is appended to the filename of the target rendition.
 - **Time Stamp:** A file date/time stamp (in ISO format down to the second) is appended to filename of the target rendition.
- **Property Mapping Picker:** This can be set to one of 2 values:

- **Auto:** This is the default value, and it means that when the document is published, metadata properties will automatically be passed through to the target rendition item, where possible.
- **None:** No custom metadata property will be set at the target location.
- **Publish at target location Checkbox:** This control is only enabled when the target library is configured for Major and Minor versioning. When checked, the document will automatically be published as a major version at the target location, otherwise it will be saved as a minor version.
- **Approve at target location Checkbox:** This control, is only enabled when the target library is configured for Content Approval. When checked the document will automatically be approved at the target location.
- **Map Content Type Checkbox:** This control is only enabled when the target location is configured to use custom Content Types. When checked, if the name of the Content Type used for the source document is the same as the name of a Content Type defined in the target library, the rendition will be assigned to that Content Type.
- **Overwrite as new version Checkbox:** When checked, if a document with the same filename already exists at the target publishing location, the **Rendition** will replace the current document as new version of that document. If this checkbox is not checked and a file of that name already exists at the target location, the publishing action will fail.

Click the **Save Button** to save the new configuration or to update an existing one.

When the configuration has been saved a green notification will be displayed but the dialog does not close automatically.

The conversion of source documents to PDF is only supported when the source document is one of the following formats: **.html, .csv, .doc, .docx, .odp, .ods, .odt, .pot, .potm, .potx, .pps, .ppsx, .ppsxm, .ppt, .pptm, .pptx, .rtf, .xls or .xlsx.**

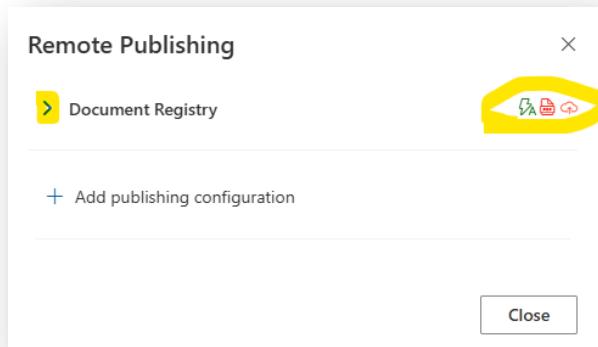
If a source document is not in one of these formats it cannot be converted to PDF and so will be published in its native file format.

Important

It is essential to understand that the publishing action is performed under the identity of the current users. This means that the executing user must have the necessary permissions at the target location.

In other words, the user must be assigned the permissions to upload and if necessary publish and approve the document at the target location, as if they were completing that action manually, through the standard SharePoint UI. If the executing user does not have the necessary permissions, the remote publishing action will fail at the point where the user has insufficient permissions.

You can create multiple remote publishing locations for each library and the configuration for each is accessed via an expandable panel, which can be toggled using the expand/collapse button in the configuration item header, next to the **Title Textbox**, as highlighted below.



There are a few status icons displayed in the header which is useful to tell at a glance if configuration is:

- Active or disabled
- Manual or for auto-publishing
- Whether PDF conversion is enabled
- If the target publishing location is on the local or a remote site

You can add more publishing configurations by clicking the **Add Publishing Configuration** button and you can delete a configuration by clicking the **Delete** button.

If you configure the system to automatically publish documents, there is no subsequent action required, renditions will automatically be generated and pushed to the specified remote publishing locations along with their Content Type and metadata, as required, so long as:

- The target publishing location still exists, i.e., the specified target site, library or folder have not been deleted.
- The executing user has the necessary permissions at the target location (as stressed above).
- The document is published using the **K-Docs Approve** UI. If you simply publish/approve documents using the standard SharePoint UI, renditions will not be published automatically, although they can still be published manually.

You can manually publish a source document to a target location at any time, so long as the publishing configuration is not disabled, and the executing user has the necessary permission at the target location, of course.

Folder Approval Routes

In the previous section we went through the process of creating and configuring an **Approval Route** item for the library and in many cases that might be all that is required.

For large organisations, with hundreds (or even thousands) of Controlled Documents it might make sense to have separate libraries for each business function, say one for Human Resources and others for Work Health Safety, Information Technology, Finance and so on. These libraries might be centralised in the same SharePoint site or de-centralised and spread over several sites.

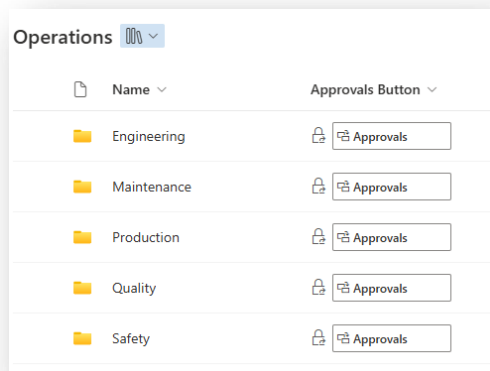
However, for smaller organisations which may have only a few dozen Controlled Documents, you might decide that approval cycles would be easier to govern if all documents are hosted in the same library.

However, the team of users which manages the Controlled Documents in one business area will likely be different from users who manage Controlled Documents in another business area. You wouldn't likely want the IT team to be involved in an approval cycle for a finance document, for example.

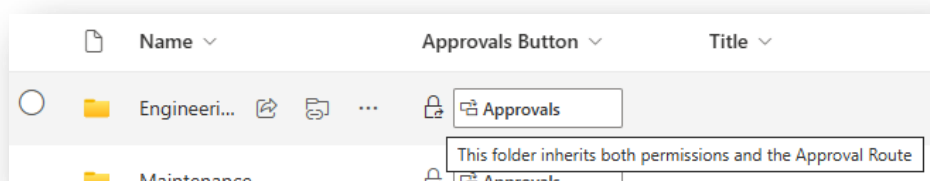
To address this, **K-Docs Approve** allows you to assign different **Approval Route Items** to different folders in the library. For this to work, you must structure the source library with folders.

How you structure these folders is completely up to you, but it makes sense to align these folders with different business functions because it is likely that your approval process will be based around subject matter experts within each business area and that way it will also be easier to manage permissions.

The screenshot below shows a library configured with a top-level set of folders aligned with different business functions.



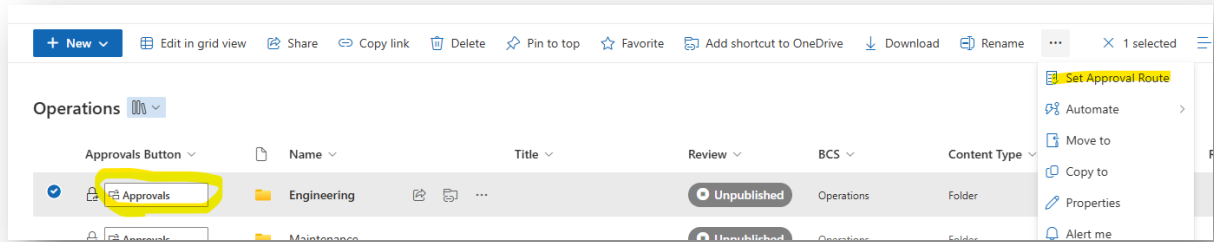
The icon to the left of the **Approvals Button** indicates that the folder currently inherits the permissions set at the library level and the icon inside the button indicates that folder also inherits the approval route assigned at the library level – this is the default case.



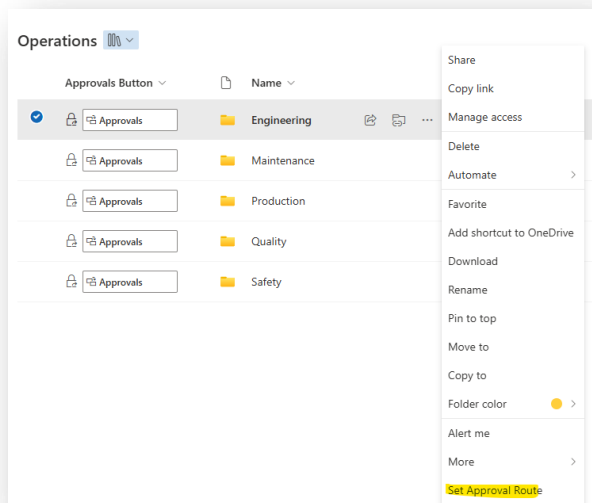
Clicking the folder Approvals Button will display a dialog box but the experience is different for **Administrators** (Owners and Site Collection Admins) than it is for other users.

The Folder Approvals Button for Administrators

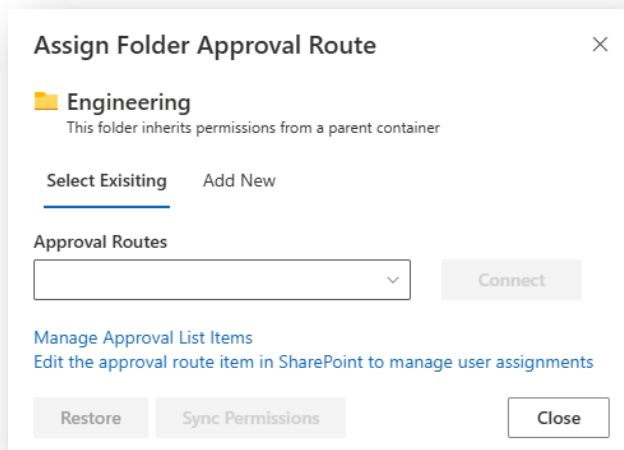
As an **Administrator** you can create and manage an **Approval Route Item** for any folder in the library by clicking on the **Approvals Button** or selecting the **Set Approval Route Menu Item** for the folder, as highlighted below:



Alternatively, you can select the ***Set Approval Route Menu Item*** from the folder edit menu.

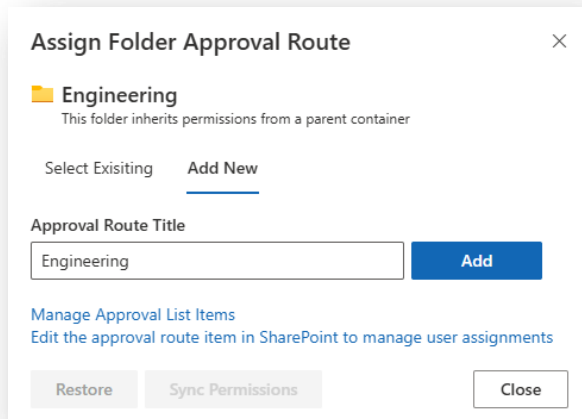


Whichever method you choose the ***Assign Folder Approval Route Dialog*** will be displayed



This dialog works in a way similar to the dialog used to create and manage the assigned ***Approval Route Item*** at the library level.

You can choose to connect the folder to any existing **Approval Route Item**, or you can select the **Add New** tab create a new one.



Assign Folder Approval Route [Close]

Engineering
This folder inherits permissions from a parent container

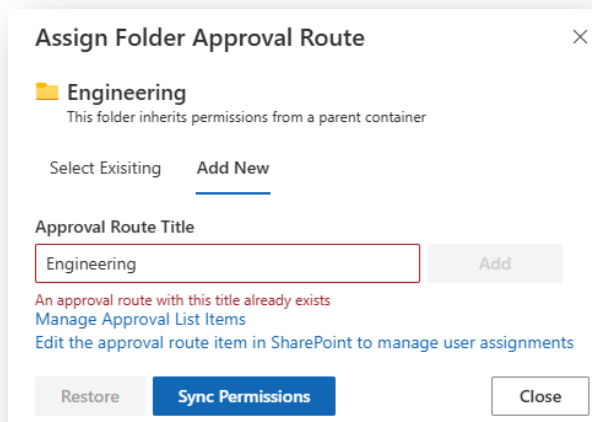
Select Existing Add New

Approval Route Title
 Add

[Manage Approval List Items](#)
 Edit the approval route item in SharePoint to manage user assignments

Restore **Sync Permissions** **Close**

Provide a unique title for the new approval route and click the **Add Button** to create it. The UI will report the newly created Approval Route Item already exists.



Assign Folder Approval Route [Close]

Engineering
This folder inherits permissions from a parent container

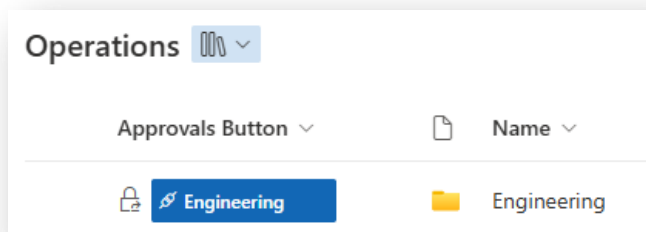
Select Existing Add New

Approval Route Title
 Add

An approval route with this title already exists
[Manage Approval List Items](#)
 Edit the approval route item in SharePoint to manage user assignments

Restore **Sync Permissions** **Close**

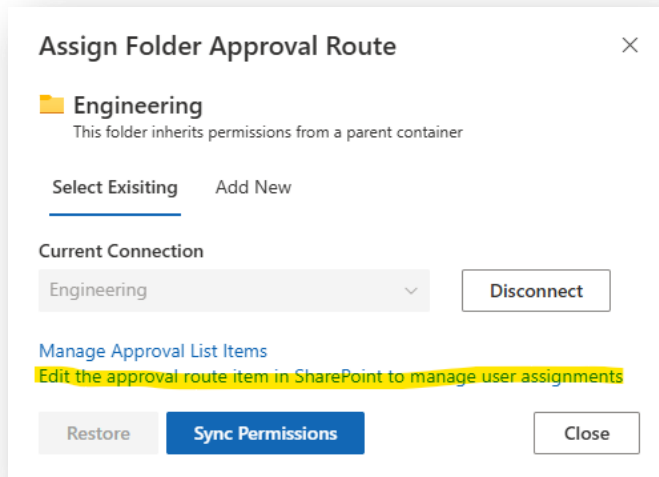
This is expected behaviour and if you close the dialog you will see that the UI reports that the folder is now connected to the new route.



Operations [Menu]

Approvals Button	Name
Engineering	Engineering

Click on the button again and you can confirm this from the dialog.



Assign Folder Approval Route [X]

Engineering
This folder inherits permissions from a parent container

Select Existing Add New

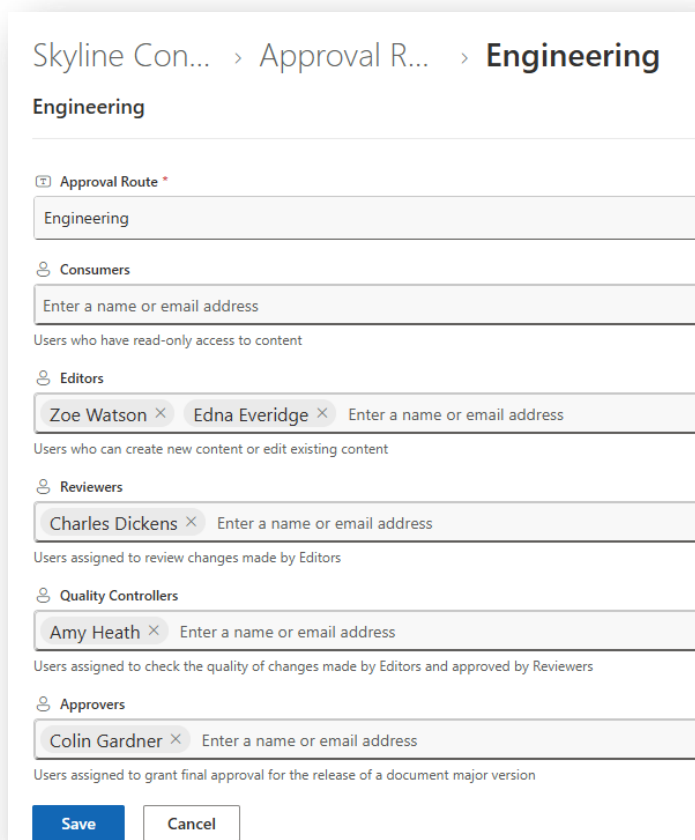
Current Connection
Engineering [v] Disconnect

Manage Approval List Items
Edit the approval route item in SharePoint to manage user assignments

Restore Sync Permissions Close

Although you have created a new Approval Route Item, no users are yet assigned to roles. You can assign roles using the standard SharePoint UI and the dialog provides a handy shortcut to edit the list item using the link highlighted above

If you click the **Edit Approval Route Button** (highlighted above) the **Approval Route** item will open, ready for you to assign users and/or SharePoint Groups to the appropriate roles.



Skyline Con... > Approval R... > **Engineering**

Engineering

Approval Route *

Engineering

Consumers

Enter a name or email address

Users who have read-only access to content

Editors

Zoe Watson × Edna Everidge × Enter a name or email address

Users who can create new content or edit existing content

Reviewers

Charles Dickens × Enter a name or email address

Users assigned to review changes made by Editors

Quality Controllers

Amy Heath × Enter a name or email address

Users assigned to check the quality of changes made by Editors and approved by Reviewers

Approvers

Colin Gardner × Enter a name or email address

Users assigned to grant final approval for the release of a document major version

Save Cancel

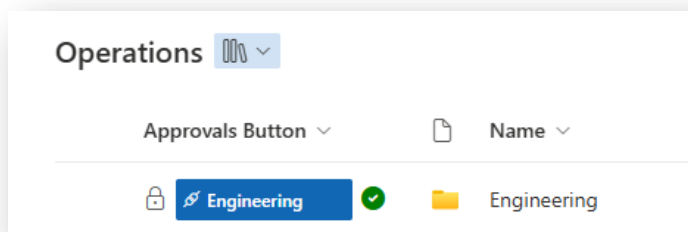
Unlike when setting up a library-level **Approval Route Item**, there is no built-in way to automatically provision SharePoint Groups for each folder-level role assignment. If you prefer to use SharePoint Groups at the folder-level you can simply create them using the standard SharePoint UI and then assign them to the appropriate role column.

*When setting up SharePoint Groups manually, remember to ensure that the group membership can be read by everyone as **this is not the default setting**.*

Once you have assigned users and/or groups to roles you can return to the dialog and click the **Sync Permissions Button**, which will:

- Set unique permissions on the folder.
- Grant the appropriate permissions to users and groups assigned to roles in the connected **Approval Route** item.

The **Approvals Button** for the folder will be updated as shown below.



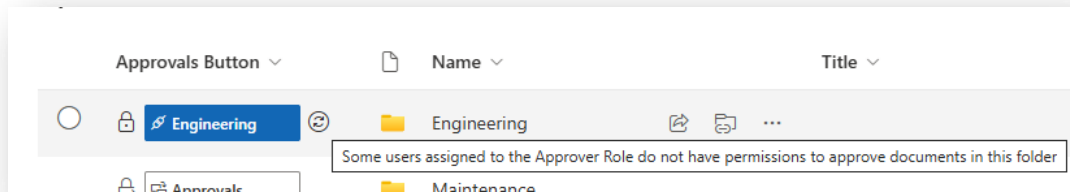
The icons now show that the folder is configured with unique permissions and is directly connected to an **Approval Route Item**, as opposed to inheriting it from the library or a parent folder.

The green icon to the right of the button indicates that the permissions assigned to the folder are synchronised with the **Approval Route Item**, such that everyone in the approval root has the permissions they need for the assigned role.

As with the library-level approvals, if you change role assignments on the folder **Approval Route Item** you can return to use the **Sync Permissions Button** at any time, to ensure that the users assigned to roles have the permissions that they need, or you can update the folder permissions manually.

When the folder button detects that the permissions are not synchronised a **Resync Button** will be displayed for **Administrators**.

If you hover over the button it will report the issue in a tooltip



In this case, a user has been assigned to the **Approver** role, but they do not currently have the permissions necessary to approve documents in this folder and publish them as a major version.

In most cases, you can simply click the **Resync Button** to resolve the issue, without the need to access the dialog.

Important

*If **Approval Route Items** contain users whose account has been deactivated the resync button will also be displayed but clicking it will not resolve the issue. You should remove any such disabled accounts from all **Approval Route Items**. If the approval route contains disabled user accounts the system will still function as expected with the exception that the **Pending Action** column (if used) will not be populated with any users.*

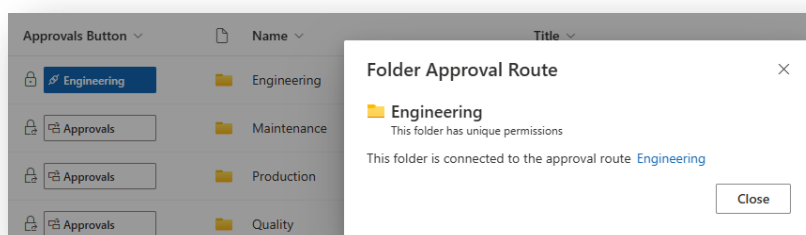
You can use the **Restore Button** in the dialog to remove the unique permissions on the folder and the **Disconnect Button** to remove the connection between the folder and its associated **Approval Route** item.

When you disconnect a folder from an **Approval Route** item, it will revert to using the first **Approval Route Item** it finds, assigned to either a parent folder, or to the library.

Note that the assignment of **Approval Routes** works in a hereditary way, similar to how SharePoint permissions work. A document will use the first uniquely assigned **Approval Route** item from a parent folder, or from the library, if no **Approval Routes** have been assigned at any intervening folder-level.

The Folder Approvals Button for Other Users

When non-administrator users access the **Folder Approval Route Dialog** they will see information about the **Approval Route** but will not be able to update any configuration settings, as shown below.



Using K-Docs Approve

The previous section detailed how to configure a document library, and these are tasks that need to be completed by an **Administrator** (Site Owner or Site Collection Administrator).

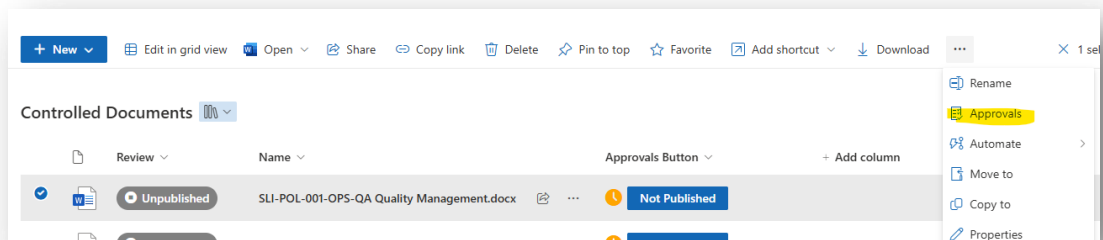
However, once a library is configured it is ready for use with users assigned to the roles as defined in the **Approval Route** connected with the library or folder.

This section details how these users engage with the system.

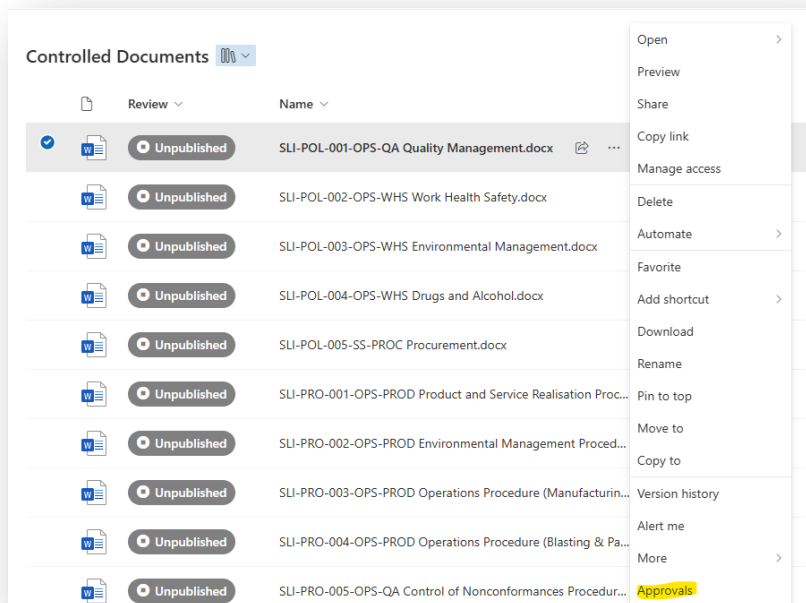
Accessing the Approvals Panel

To interact with the system, users will need to access the **Configuration Panel**. This can be done in 3 ways, by:

- Selecting the document item and clicking the **Approvals Menu Item** from the list view toolbar, as highlighted below.



- Selecting the **Approvals** item from the **Edit Control Block (ECB)** menu of a document, as highlighted below.



- Clicking the **Approvals Button Column**, assuming that the library is configured with that column and that column has been added to the library view. This is generally the most convenient way to access document **Approval Panel**.

Whichever method is chosen, the resulting action is to display the **Approvals Panel**, as shown below.

Controlled Document Approvals

SLI-POL-001-OPS-QA Quality Management.docx
Version: 0.4 Updated 29 June 2025, 1:32 pm

...

Current State: Content Review

Current Status: Pending

Approval Route: Controlled Documents

Editing

Content Review

Quality Control

Final Approval

Editors

Content Reviewers

Quality Controllers

Approvers

CD

EE

Comments

Add a comment - you must add a comment if you intend to reject a submission

Add Comment

Approval Cycle 1

Colin Gardner: Completed Editing v 0.4
29 June 2025, 1:32 pm

...

Sent to Quality Controls

Reject

Remote Publish

☐ Keep panel open

Notifications ☒ On

Controls on the Approvals Panel

The **Approvals Panel** contains several controls.

Document Header

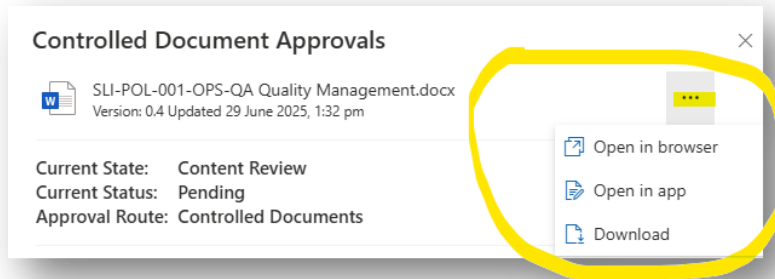
SLI-POL-001-OPS-QA Quality Management.docx
Version: 0.4 Updated 29 June 2025, 1:32 pm

...

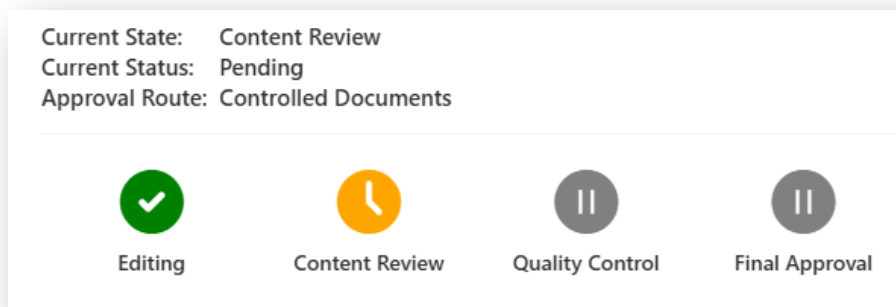
This control is displayed at the top of the panel and provides some key information about the selected document, specifically:

- The file type icon.
- The filename.
- The current version of the document.
- When the document was last updated.

It might also be configured to allow access to the document from a button or drop down menu.



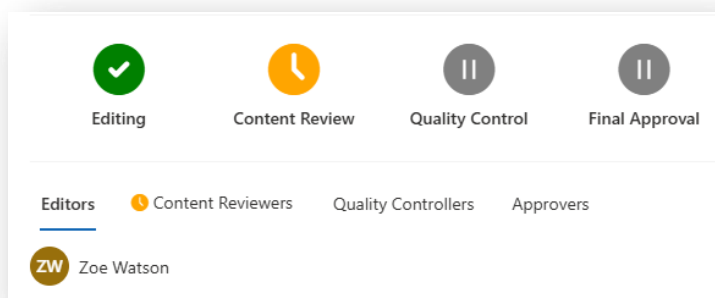
Approval Status Information



This control sits beneath the **Document Header** and provides some key status information about the current state, step status and the **Approval Route Item** that is being used for this approval cycle.

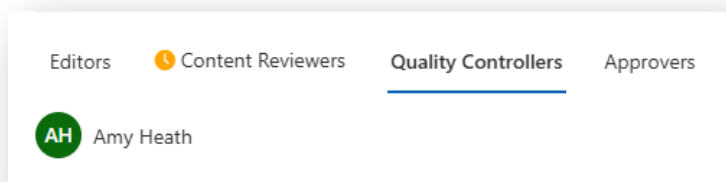
The above screenshot shows that the 4 primary states are relevant for this approval cycle. This is because at least one user has been to a role for that state. If no users are assigned to a particular role for a state, the status icon for that step is not shown in the UI. The system assumes that the state is not required and will simply advance to the next state for which users have been assigned.

You can easily see who is assigned to each step, simply by hovering over the status icon for that step, as shown below.



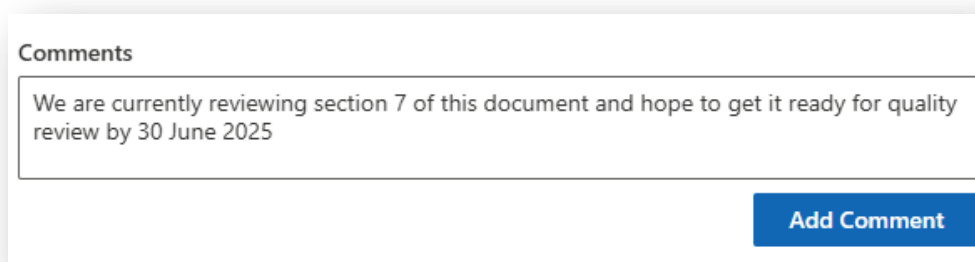
The status icons provide a visual indication of where the approval is sitting currently. In this case, it still resides with the **Content Reviewers**, as indicated by the yellow clock icon. The grey pause icons indicate that the approval cycle has not yet reached those steps in the process.

Below the status icons is a set of tabs which also show you who is assigned to each role. Simply select the tab for the relevant role.



By default, the selected tab will show the role assignments for the current step, but you can select any tab to view other role assignments. As with the status icons, tabs are only shown for state in which users are assigned to the corresponding role.

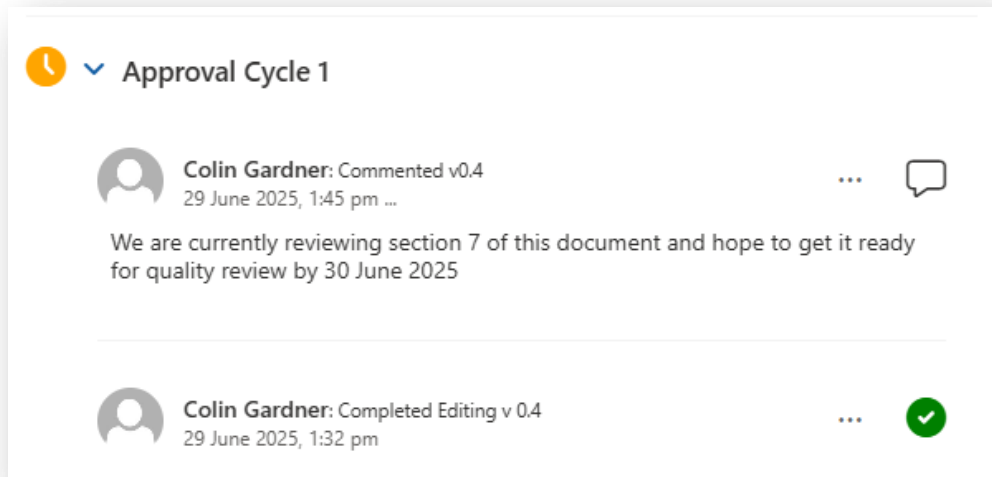
Comments Box



Any stakeholder, that is to say any user with read and write permissions on the document, can add a comment to the **Comment Box** control at any time. They simply need to access the **Approval Panel**, type in an appropriate comment and click the **Add Comment Button**.

Actions Log

Whenever a user adds a comment or completes an action (submission to the next state, rejection or approval) an action will be recorded in the **Actions Log**. The screenshot below shows the log when the above comment was added, which was the action executed when editing was completed.



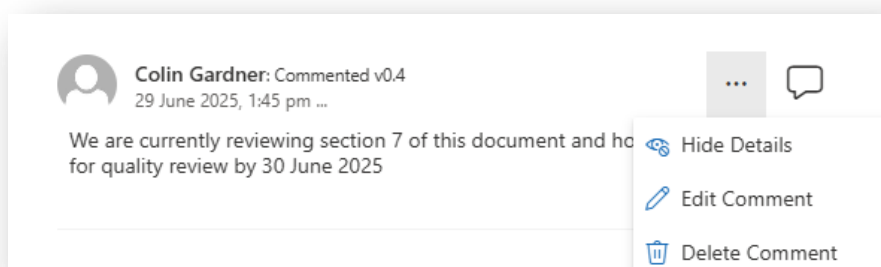
The log entries shows:

- **Actioning User:** The user whose action resulted in the log entry.
- **Action Type:** In the first case above the action type was “Commented” as indicated by the text displayed after the **Actioning User** and by the quote icon. The previous action was to flag that editing was completed and so the process advanced to the **Pending Content Review** step
- **Action Date and Time:** The date and time when the action occurred.
- **Comment:** Comment text that may have been provided by the **Actioning User**.

Providing comment text is mandatory when submitting a comment (you can’t create a blank comment) or when rejecting a submission.

When you are submitting an item for consideration in the next step of the approval cycle or approving a submission, users are not required to add a comment, although they are encouraged to do so.


The ellipsis menu for the log item can be used to hide (collapse), edit or delete the action comment.



Users can only edit or delete their own comments. However, they can only do so for the current approval cycle. Once an approval cycle is completed (the document has been approved and published as the next major version) all comments for that cycle are locked and cannot be updated subsequently.

When you access a document that has completed an approval cycle, and is currently published as a major version, you can still access the Approvals Panel which will be rendered like the one in the screenshot below.


Controlled Document Approvals


 SLI-POL-003-OPS-WHS Environmental Management.docx
Version: 1.0 Published 29 June 2025, 1:52 pm


Current State: Pending Next Review


Current Status: Published

Approval Route: Controlled Documents

 Editing

 Content Review

 Quality Control


 Final Approval

Editors

Content Reviewers


Quality Controllers

Approvers

 Colin Gardner

Comments


Add Comment

 > Approval Cycle 1

You can then expand any of the previous approval cycles and view the actions log, comments and approval history.

By default, only data from the 3 most recent approval cycles is loaded, but if more data is available you can click the **Load more** or **Load all** links, as highlighted below.


Approvals


 QHSE-IMS-PRO-012 Management Review Procedure.docx
Version: 5.0 Published 9 Jan 2024, 7:47 am


Current Step: Pending Next Review


Current Status: Approved


Approval Route: K-Docs Approvals


 Drafting


 Content Review

 Quality Control

 Final Approval

 > Approval Cycle 5

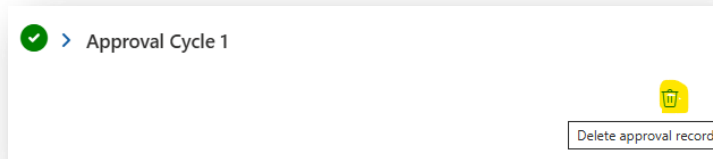
 > Approval Cycle 4

 > Approval Cycle 3

Load more | Load all 6

Clear Log Data Button

Approval log data is generally only added to as the document progresses through more approval cycles. However **Administrators** will be shown **Delete Approval Button** as shown below.

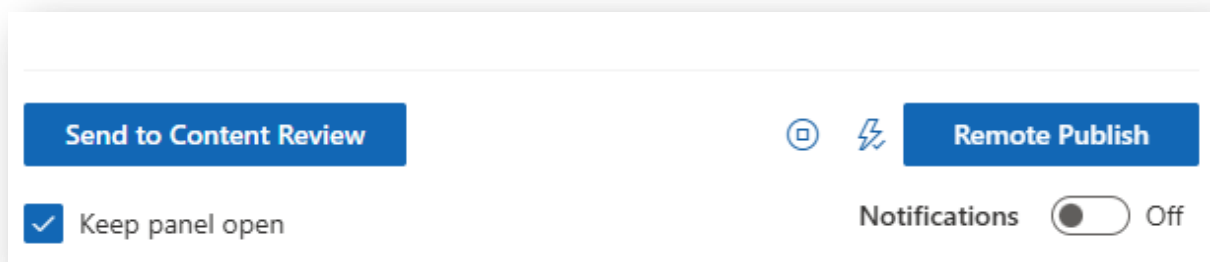


This provides an opportunity to clear the contents of the hidden data field which is used to store the approval record. This might be useful when testing the system or if an existing item is **Saved As** because the approval data of the source item will also get copied to the new document item.

Note that this capability is available to **Administrators** only.

Footer Controls

The footer section of the panel contains several buttons and other controls, as shown below.



The Submit Button

The **Submit Button** allows users to indicate that the process is ready to advance and be evaluated by users assigned to a role in the next step in the approval cycle.

The text for the button adapts dynamically based on the current state and next steps in the process.

If no users are assigned to a specific role, the system will conclude that the step is not required and will progress to the next step for which a user has been assigned to a role.

The Reject Button

The **Reject Button** is only available for the **Content Review**, **Quality Review** and **Final Approval** states and it allows users to reject a submission.

If a **Content Reviewer**, **Quality Controller** or **Approver** rejects an item they must:

- Select the step to send the approval process back to, and
- Provide a comment – the **Reject Button** will not light up until a comment has been provided.

Users can only reject a submission to a previous step, and so:

- **Content Reviewers** can only reject a submission back to **Drafting**.

- **Quality Controllers** can only reject a submission back to either **Drafting** or **Content Review**.
- **Final Approvers** must decide whether to reject a submission back to **Drafting**, **Content Review** or **Quality Review**.

The screenshot below shows a document that has been submitted for **Final Approval** but is about to be rejected to one of the available previous steps.

The screenshot shows a document approval interface. At the top, there is a 'Comments' section with a text box containing 'Please review section 3 again and...'. Below this, there is a section for 'Approval Cycle 2' with a clock icon. A dropdown menu is open, showing three options: 'Back to Editing', 'Back to Content Review', and 'Back to Quality Control'. At the bottom, there are two buttons: 'Final Approval' (blue) and 'Reject' (grey with a red 'x' icon and a dropdown arrow).

Simply selecting the appropriate option will execute the rejection process.

Users can only reject a submission back to a step which has users assigned to the role. So, in the above example, if no one was assigned to the **Content Reviewer** role that option would be disabled.

When an item is rejected the approval state is set to the selected value and the approval step status value is set to the **Rejected** and the rejected icon will be displayed in the **Approvals Button Column**, as shown below.

The screenshot shows the document header bar. On the left, there is a document icon. Next to it is a green button with a checkmark and the text 'In Date'. To the right of this is the document title 'SLI-POL-003-OPS-WHS Environmental Management.docx'. Further right is a red 'x' icon. On the far right is a blue button with the text 'Editing'.

Accessing the **Approval Panel** will show the step from which the rejection was made together with the item in the **Actions Log**.

Controlled Document Approvals

SLI-POL-003-OPS-WHS Environmental Management.docx
Version: 1.5 Updated 29 June 2025, 2:08 pm

...

Current State: Editing

Current Status: Rejected

Approval Route: Controlled Documents

Editing

Content Review

Quality Control

Final Approval

Editors

Content Reviewers

Quality Controllers

Approvers

Zoe Watson

Comments

Add a comment

Add Comment

Approval Cycle 2

Colin Gardner: Rejected Final Approval v 1.5
29 June 2025, 2:08 pm ...

Please review section 3 again and...

Notifications Toggle

Usually, you will want to automatically send the next-in-line users a notification message to let them know that the approval lifecycle has reached the step where it is ready for their consideration. However, sometimes you might want to suppress user notifications, when testing the system for instance, and this can be achieved by switching the **Notifications Toggle** to **Off**.

This toggle switch is only displayed to **Administrators** by default.

Keep Panel Open Checkbox

Most of the time, users will want to close the **Approvals Panel** when clicking the **Submit Button** or **Reject Button**, but sometimes it is useful to keep the panel open, and this can be achieved by checking this checkbox control.

This checkbox is only displayed to **Administrators** by default.

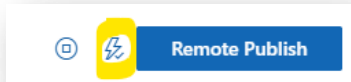
Remote Publish Button

The **Remote Publish Button** is used to access the **Publishing Dialog**, described later in this document. Note that the **Remote Publish Button** will only be enabled if the source library has been configured with at least one active publishing location.

This button is only displayed to **Administrators** by default.

Quick Publish Button

The **Quick Publish Button** is an icon-only button, just to the left of the **Remote Publish Button** and is only displayed when the document is not currently an approved major version.



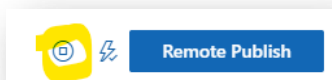
Clicking this button will:

- Automatically approve the document and publish it as the next major version.
- Synchronises the state and step status values with the document.
- Create a “Quick Publish” action log entry item.
- Trigger remote publishing configurations that are set to automatically publish a rendition when a major version of the document is approved and published.

This button is only displayed to **Administrators** by default.

Obsolete Button

This is a small icon only button the left of the **Quick Publish Button**.



When clicked, the document will be flagged as obsolete.

This button is only displayed to **Administrators** by default.

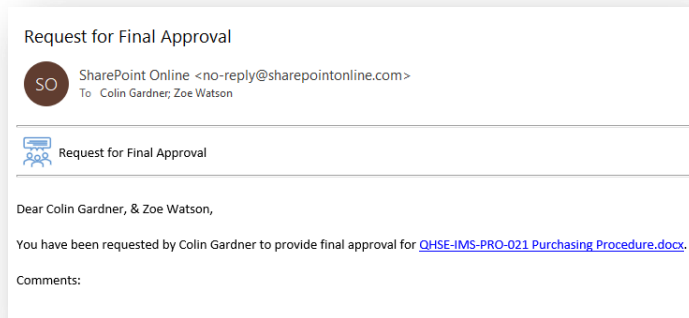
Close Button

Clicking the **Close Button** will simply close the **Approval Panel**.

Notifications

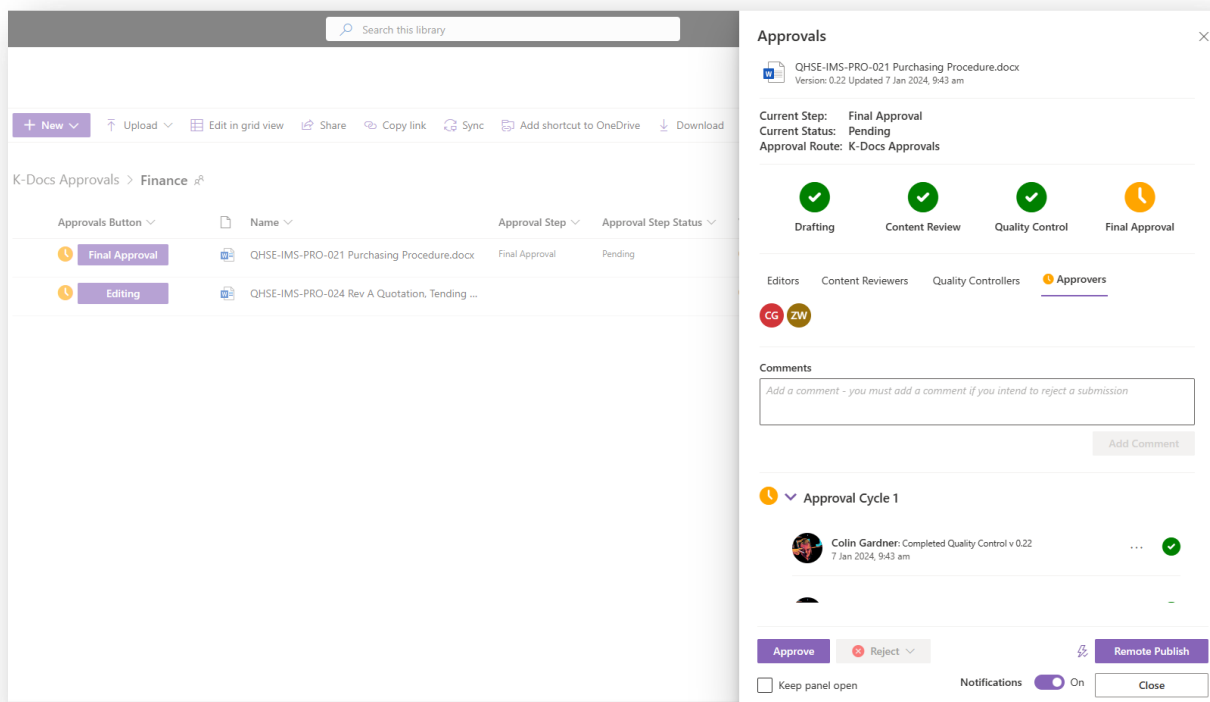
Notifications are only sent if notification has been configured, as detailed in the previous section which describes the purpose and function of the **Ensure Notifications Button**, and when the **Notification Toggle** is set to **On**.

K-Docs Approve is smart enough to figure out who the next-in-line stakeholders are, based on the **Approval Route Item**. Depending on the current state and the next step, **K-Docs Approve** will identify which message template to use as the basis for notification messages and to whom these emails are sent. The screenshot below shows the default notification message that is sent to **Approvers**, triggered by a submission from a **Quality Controller**.



This is a basic message and the subject line and body text can easily be customised to suit the needs of your organisation. Refer to the previous section on configuring the ***K-Docs Message Template List***, which explains how to customise the notification message templates and the use of tokens that ensure that the message content and hyperlinks are relevant to the context of the document.

The default message contains an embedded hyperlink which, when clicked, opens a new browser window at the location in which the document resides and will then automatically open the ***Approvals Panel***, as shown below.



Users can then take the appropriate action.

When a step is approved, notifications are also sent to the stakeholders of the preceding step to let them know that their submission was accepted. For example, if a **Content Reviewer** submits a document for **Quality Review** and a **Quality Controller** approves that submission, 2 emails will be sent:

- One to all users assigned to the **Approver** role to let them know they have been requested to approve the document.

- One to the **Content Reviewer** who submitted the document for **Quality Control**.

By default, all stakeholders in the approval cycle will be notified when an **Approver** approves the release and publication of the next major version of the document.

When requests for approval are rejected, the rejecting user decides which of the previous steps the approval process is to be sent back to. As explained previously:

- An **Approver** can send the process back to **Editing**, **Content Review** or **Quality Review**.
- A **Quality Controller** can send the process back to **Editing** or **Content Review**.
- A **Content Reviewer** can only send the process back to **Editing**.

When an item is rejected, all stakeholders involved in the previous affected steps will be notified.

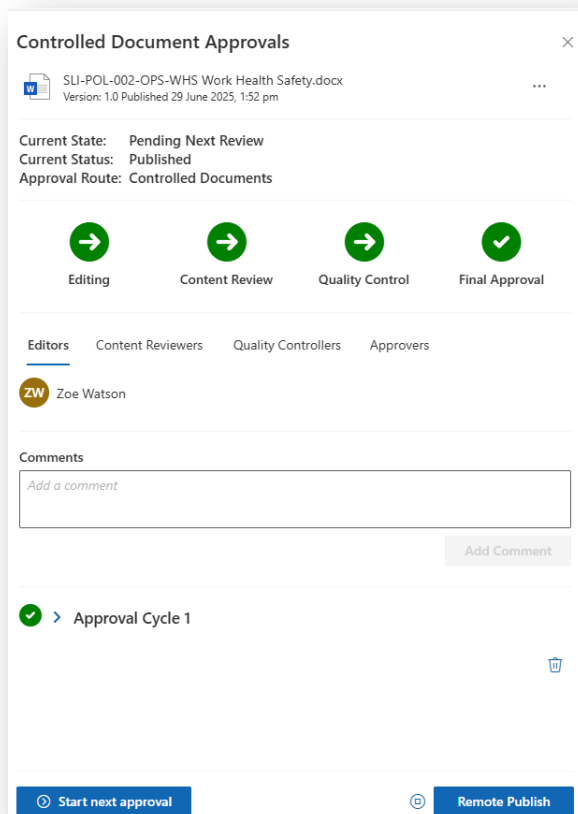
Remote Publishing

The previous section on **Manage Publishing Button** explained how to configure a library to support remote publishing. In that section, it was explained that publishing configurations can be set to automatically publish a rendition when:

- A document transitions to a new state.
- When a document is approved as a new major version.

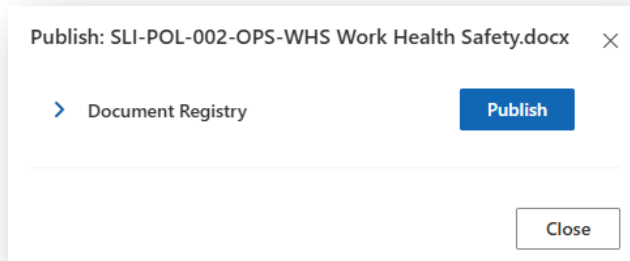
In most cases you will only want to auto-publish renditions when a major version is approved.

However, users can remotely publish a document to any active location at any time by clicking the **Remote Publishing Button** from the **Approvals Panel** as highlighted below.

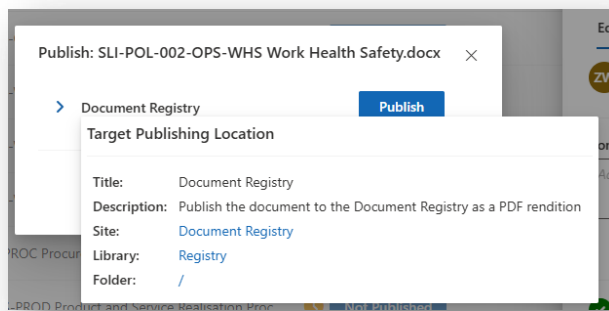


The Remote Publishing Dialog

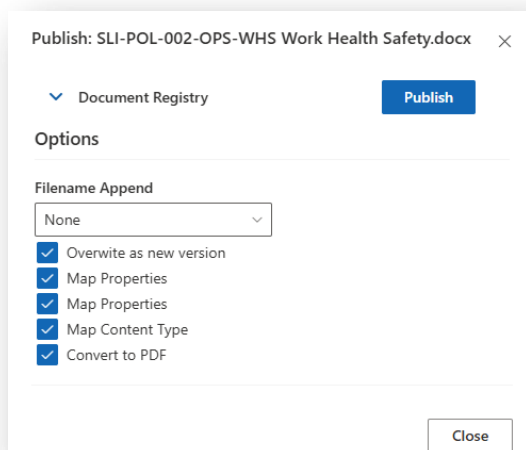
Clicking the **Remote Publish Button** will display the **Remote Publishing Dialog**, which will list all active publishing configuration defined for the library. In the screenshot below there is only one active publishing configuration but you could set up several.



If you hover over a publishing configuration title, summary details of the configuration will be displayed in the **Configuration Hover Card**, as shown below.



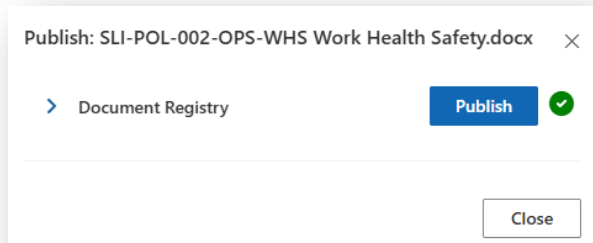
You can also expand the configuration by clicking the expand/collapse button, to the left of the configuration title. This will reveal controls which can be used to override some of the settings set as defaults for the configuration.






If the target library is not configured for major/minor versioning or content approval, checkboxes for those features are not displayed, as they are not relevant.

Simply click the **Publish Button** to start the publishing process. A spinner control will be displayed next to the button to indicate that the **Rendition** is being generated and that the remote publishing action is underway.

In most cases, processing will only take a few seconds and all being well, a green status icon will be displayed next to the **Publish Button** to indicate that the action was successful.



You can use the links in the **Configuration Hover Card** to quickly access the target location and confirm that the rendition has been successfully published.

Registry 					
	Name	Content T...	Functional Area	Release Authority	Modified
	SLI-POL-002-OPS-WHS Work Health Safety.pdf	Policy	Operations:Work Health Safety:HAZMAT:FireMat:Electrical	CEO	About a minute ago

Content Type Mapping

The above screenshot shows that the Content Type of the source document can be mapped to the Content Type at the target location as both are Policies. However, this only happens when:

- The target location is configured to use custom Content Types
- The name of the Content Type assigned to the source document is the same as a Content Type that exists on the target location.
- The **Map Content Type** option is specified in the **Remote Publishing Dialog**.

Metadata Mapping

When the option to **Map Properties** is selected, **K-Docs Approve** will attempt to map the metadata attributes assigned to the source document to those at the target published rendition. Metadata mapping will work when:

- The title or internal name of the source column matches the title or the internal name of the target column and,
- The column types are the same or are compatible,
- The source column is mappable, which means that they are one of the following types:
 - Single line text

- Multi-line text
- Choice (or Multi-Choice)
- Number
- Currency
- Date and Time
- Yes/No
- Person or Group
- Hyperlink or Picture
- Image
- Managed Metadata
- Calculated

The following field types are not mappable:

- Computed
- Task Outcome
- External Data

If there is a mismatch in cardinality, then only some of the data will be mapped.

For example, if a source column is configured to support multiple values i.e., it is a multi-value choice, user, or managed metadata column but the target column is mapped by name and type but is configured for a single value then only the first value from the source column will be assigned to the target column.

Calculated source columns can only be mapped to text columns at the target, but single or multi-line column are supported.

Finally, note that null or empty values assigned to the source column will clear any values assigned to a matching target column.

Source Column Mappings

If you need to map additional source column values to target columns it is possible to do so by carefully creating target columns that have an internal name which is prefixed with the text **_source** followed by the internal name of a column at the source location

When metadata mapping is enabled, the **K-Docs Approve** publishing module will then try and map column values from the source item to the target **Rendition**.

For example, if you want to map the version number of the source document to a column in the target location, you should first create a column with the name:

_source_UIVersionString

Once you have created the column name using this naming pattern, you can then rename the column title to anything you like, such as **Source Version**, which is how the column, of that name in the above screenshot was configured.

A list of internal names for commonly used standard columns is provided in the table below:

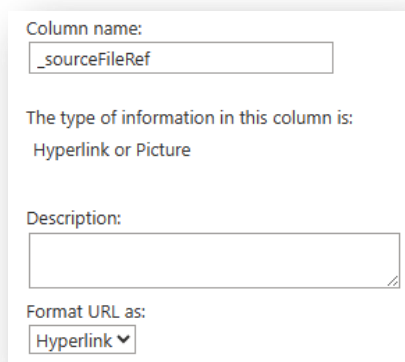
TITLE	INTERNAL NAME
Approval Status	_ModerationStatus
Approver Comments	_ModerationComments
Check In Comment	_CheckinComment
Checked Out To	CheckedOutTitle
Content Type	ContentType
Content Type ID	ContentTypeId
Created	Created
Created	Created_x0020_Date
Created By	Author
Document Created By	Created_x0020_By
Document Modified By	Modified_x0020_By
Encoded Absolute URL	EncodedAbsUrl
File Size	File_x0020_Size
File Size	FileSizeDisplay
File Type	File_x0020_Type
GUID	GUID
ID	ID
Is Current Version	_IsCurrentVersion
Item Type	FSObjType
Modified	Modified
Modified	Last_x0020_Modified
Modified By	Editor
Name	FileLeafRef
Path	FileDirRef
Server Relative URL	ServerUrl
Title	Title
Type	DocIcon
UI Version	_UIVersion
Unique Id	UniqueId
URL Path	FileRef
Version	_UIVersionString
Workflow Version	WorkflowVersion

Mapping the source Content Type to a text field at the target location can sometimes be useful as this provides an opportunity to create views which can be grouped by a Content Type name, which is something that SharePoint does not support natively.

It also allows the Content Type name to be used in a calculated column at the target location, which again, is sometimes useful.

To create source field mapping for the Content Type, simply create a new single line text column at the target location, initially with the name **_sourceContentType**. Then set a more meaningful title value such as **Document Type**, which was used in the above example.

You can also map source column values to columns other than text columns. In the above example the **_sourceFileRef** column was created as a hyperlink column.



The screenshot shows a SharePoint column configuration dialog box. It has four sections: 'Column name:' with a text box containing '_sourceFileRef'; 'The type of information in this column is:' with a dropdown menu set to 'Hyperlink or Picture'; 'Description:' with an empty text box; and 'Format URL as:' with a dropdown menu set to 'Hyperlink'.

You can see from the screenshot that this can be used to provide a hyperlink to the source document.

Of course, the column name at the target location would normally be given a more user-friendly title such as **Source File Link**, or something similar.