



SARD

PREPARED BY THE CORPORATE INFORMATION USABILITY GROUP

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Overview

The screenshot shows a user interface for managing document reviews. At the top, there is a navigation bar with the 'NEW YORK LIFE' logo, 'Documents in Review' (highlighted in red), 'Previous Documents', and a 'New Document' button. Three black circles labeled A, B, and C point to specific elements: A points to the 'Documents in Review' tab; B points to the 'Status' column in the table; and C points to the approver details in the first row.

Document	Date:		Sections:		Approvers days	Status	edit
	Original	Modified	Items	Review			
Giacomo Guilizzoni	00/00/12	00/00/12	23	6	DL 5 DD 7 +4	In Review	edit
October 2012doc	00/00/12	00/00/12	21	3	AX 3	In Review	edit
Client Review doc	00/00/12	00/00/12	10	10	AX 3 DL 5 AQ 9	In Review	edit

- A. Access to documents currently in review and documents that have been completed
- B. Display of documents is specific to each user.
- C. Each document shows approvers and days left to review

B

show approvers highlight approvals collapse approvals approve all

Approvals 6

<p>Section 1: Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata.</p> <p>Section 2: At vero eos et accusam et justo duo dolores et ea rebum.</p>	<input checked="" type="checkbox"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>
<p>Section 3: Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit</p>	<input checked="" type="checkbox"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>
<p>Section 4: Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit</p>	<input checked="" type="checkbox"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>

Approver View: General edit mode

- A. Nav bar is always available
- B. Approvals show how many remaining sections to review, nav arrows take user forward and backwards to next approval section
- C. Each section marked to approve has section specific navigation

Approver View: Show all approvers

The interface shows a list of sections with approval buttons. The first section contains placeholder text. The second section is highlighted with a large black circle containing the letter 'A'. The third section contains more placeholder text.

	Approvals
<p> Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata.</p>	<input checked="" type="checkbox"/> DL AQ RG
<p> At vero eos et accusam et justo duo dolores et ea rebum.</p>	<input checked="" type="checkbox"/> DL RG
<p> Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit</p>	
<p> Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augDuis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit</p>	<input checked="" type="checkbox"/> DL AQ RG

- A. Section specific navigation changes to show all the approvers for the section

Approver View: Highlight approvals

The screenshot shows a user interface for managing approvals across four sections of text. At the top, there are four buttons: "show approvers", "highlight approvals" (which is highlighted in blue), "collapse approvals", and "approve all". To the right is a "Approvals" button with a counter of "6". Below these are four sections of text, each with an approval status indicator (checkmark or X) and a "DL" button.

- Section 1:** "Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata." Approval status: Approved (checkmark). Action buttons: Edit, View, Delete, DL.
- Section 2:** "At vero eos et accusam et justo duo dolores et ea rebum." Approval status: Approved (checkmark). Action buttons: Edit, View, Delete, DL.
- Section 3:** "Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit" (with a large black circle containing the letter "A" overlaid). Approval status: Pending (X). Action buttons: Edit, View, Delete, DL.
- Section 4:** "Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit aug" (with a large black circle containing the letter "A" overlaid). Approval status: Pending (X). Action buttons: Edit, View, Delete, DL, AQ, RG.

- A. Highlighting approvals dims out sections that do not need approval but keeps text in context.

Approver View: Collapse sections

The screenshot shows a user interface for managing approvals. At the top, there are four buttons: "show approvers", "highlight approvals", "collapse approvals" (which is highlighted in blue), and "approve all". To the right is a "Approvals" button with a circular arrow icon and the number "6". Below these are three sections of text, each with its own approval controls.

- Section A:** Contains the text: "Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata." It has a black circle with the letter "A" on its left side.
- Section B:** Contains the text: "At vero eos et accusam et justo duo dolores et ea rebum."
- Section C:** Contains the text: "Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit aug" followed by a continuation: "Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augu."

Each section has a set of icons for approval status (checkmark, pencil, document, X) and a "DL" button. The first two sections also have "AQ" and "RG" buttons respectively.

- A. Collapsing approvals hides sections not requiring approvals

Approver View: Add note

The screenshot shows a user interface for managing approvals. At the top, there are four buttons: "show approvers", "highlight approvals", "collapse approvals", and "approve all". To the right is a "Approvals" button with a counter of "6". Below this is a list of sections:

- Section 1: "Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua." This section has a note icon (A) and a note overlay containing the same text.
- Section 2: "At vero eos et accusamus et iusto odio dignissim qui blandit praesent luptatum zzril delenit aug" (partially visible).
- Section 3: "Duis autem vel eum i" (partially visible).
- Section 4: "Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit aug" (partially visible).

Each section has a set of buttons below it: a checkmark, a pencil, a document, a red X, and a "DL" button. A note icon (B) is located near the bottom right of the interface.

- A. Each section navigation has ability to add notes.
- B. Once a user adds a note, notes indicators appear within the section navigation.

Creator View: Add approval section

Doc Name: Due Date: Approvals: 1

A **Create approval section** **Approvers:** [add](#)

Section A:
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata.

At vero eos et accusam et justo duo dolores et ea rebum.

Section B:
Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit aug
Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit aug.

Approver Buttons: |

- A. Creating a document allows the user to add sections for approval.

By selecting the section for approval and clicking the 'create approval section' button the user then has the ability to add approvers.

Creator View: Add approvers

Doc Name: Due Date: Approvals: 1

[create approval section](#) Approvers: [DL](#) [AQ](#) [RG](#) [add](#)

Placeholder text: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue.

Init	Name	Email	Review Days
DL	Daniel Louis	Daniel_Louis@NYL.	5 <input checked="" type="checkbox"/>
AQ	Andrew Quark	Andrew_Quark@N	10 <input checked="" type="checkbox"/>
RG	Rich Glick	Rich_Glick@NYL.co	5 <input checked="" type="checkbox"/>
			5 <input checked="" type="checkbox"/>
			5 <input checked="" type="checkbox"/>
+			

[OK](#)

- A. Each approver has document specific options including name, initials, email and days to review the document