



# Approval Role Feature Overview

# How the Approval Role Works

The Approval Role Feature allows your organization to control who can accept the final video within a project. This ensures a structured workflow for review, revision, and finalization.

# Administrator Controls who is assigned the FINAL APPROVER role at the Organization Level



## **Admin-Managed Role Assignment**

Only Administrators can assign the Final Approver Role to organization members.



## **Automatic Project Assignment for Admins**

If an Administrator is assigned the Final Approver Role at the organization level, they are automatically set as a Final Approver on every project.



## **Manual Project Assignment for Members**

If an Administrator assigns an Organization Member the Final Approver Role at the organization level, an Administrator must manually set them as a Final Approver at the project level.



## **Role Flexibility for Admins**

Administrators can turn the Final Approval Role on and off for members at any time.

# Dashboard View

## Organization Level

1 Since this Admin has Final Approval status at the organization level, they'll automatically be added as a Final Approver on every project.

2 This Admin isn't set as a Final Approver at the organization level. They or another Admin will need to turn it on to enable it across all projects.

The screenshot shows a table with columns for Role, Enable Copilot, and Set Approver. There are four rows of users. The first two are Administrators, and the last two are Organization Members. The 'Set Approver' column has toggle switches for each user. Arrows point from callouts 1, 2, 3, and 4 to specific elements in the table.

	Role	Enable Copilot	Set Approver
AT	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
JL	Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AG	Organization Member	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CR	Organization Member	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Administrators**

- Add or remove organization members
- Change organization member roles
- Create and manage teams
- Have full access to all the teams and projects of organization

**Organization Members**

- View list of other organization members
- View list of projects they are associated with
- View list of teams they are associated with

3 This member has Final Approval status at the organization level, but an Admin still needs to manually turn on the Approver Role for a given project.

4 This member hasn't been granted Final Approval status at the organization level. An Admin can turn it on at any time.

# Approval Workflow at the Project Level

## Sending for Review

- Project Managers who do not have the Final Approver Role can send a video for review or submit a revision request, but they cannot approve the final video.

## Notifications

- When a Project Manager sends a video for review, all project members with the Final Approver Role receive an email notification that the project is ready for their review.

## Final Approver Review Process

Once notified, Final Approvers can take one of two actions:

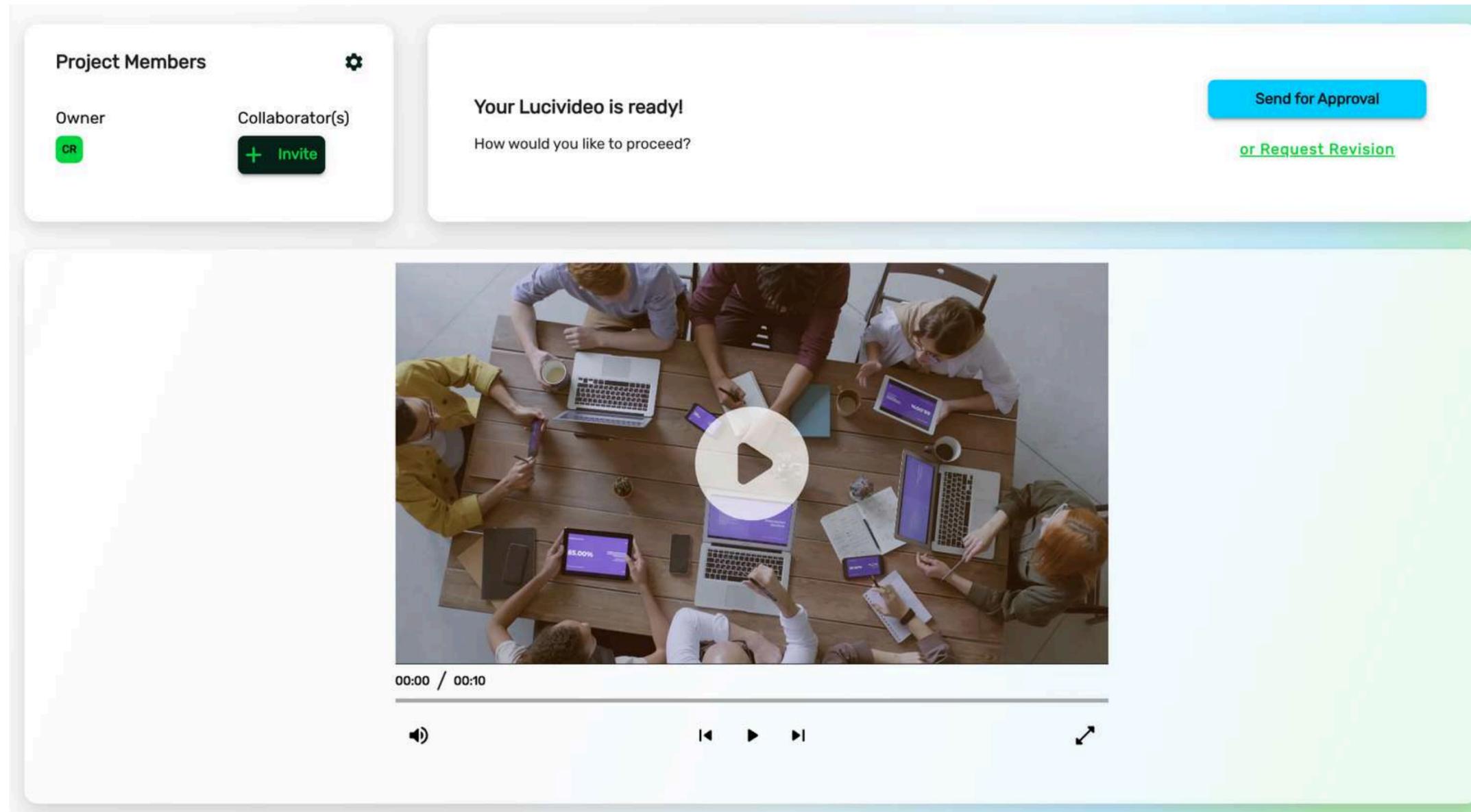
- Accept the video to finalize it and download a MP4, as well as others with those permissions.
- Submit a revision request, which starts a new revision cycle until the video meets approval.

## Final Approval

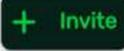
- Only individuals with the Final Approver Role turned on for that project can accept the final video.

# Project Managers: Request Revisions & Notify Final Approvers

## Non-Approver Dashboard View



Project Members 

Owner  Collaborator(s) 

Your Lucivideo is ready!  
How would you like to proceed?

  
[or Request Revision](#)

00:00 / 00:10

- Project Managers without the Final Approver Role **can request revisions** to the videos.
- These Project Managers **cannot approve the final version** of the video.
- Once they are satisfied with revisions made, they click the **"Send for Approval"** button within the platform.
- Once submitted, **all users on the project with the Final Approver Role receive an email notification** that the project is ready for review and final sign-off.

# Making the Final Call: Approval or Revisions

## Final Approver Dashboard View

Project Members

Owner **CR**

Collaborator(s) [+ Invite](#)

Your Lucivideo is ready!

How would you like to proceed?

[Accept Video](#)

[or Request Revision](#)

00:00 / 00:10

- Once notified, Final Approvers can take one of two actions:
  - **Accept the video** to finalize it.
  - **Submit a revision request**, which starts a new revision cycle.
- Only individuals with the Final Approver Role assigned for that project can approve the final video.
- **Only one individual needs to approve the video.**
- If a revision is requested, the process continues until the video is approved.
- This step can serve as a collaboration between the Project Manager and the Final Approver to confirm any potentially requested revisions before submission. (see next slide)

# Workflow For Revisions by Final Approver

## Non-Approver Dashboard View

The dashboard is divided into several sections:

- Project Members:** Shows the Owner (CR) and Collaborator(s) (+ Invite).
- Invite Reviewer:** Includes a "Copy Link" button and a QR code.
- Submit your revisions:** Features a "Send Final Revisions" button and a link "Or Send for Approval".
- Video Player:** Displays a video of a meeting with a play button overlay. The progress bar shows 00:00 / 00:10.
- Revisions Log:** A list of revision requests with timestamps and user initials (CA, JL). Each entry includes a trash icon for deletion and an edit icon for the last entry.

**Revisions Log:**

- CA** Add a text overlay here with the speaker's name and title. Add title here. 00:00
- CA** Can we trim the pause here? It feels a bit long before the speaker starts talking. 00:03
- CA** Add a call-to-action graphic here: 'Learn More at OurWebsite.com' 00:10
- JL** Great notes! I agree with all, especially adding the name/title overlay. I'll go ahead and submit the revision requests now. 00:00

**Form:** Type request to editor here... 00:00

**Save to Log**

- A Non-Approver has reviewed the video and clicked "**Send for Approval**".
- The final reviewer did not approve the video and instead left **timestamped revision requests**.
- In this view, the Non-Approver can:
  - **View all revision comments** left by the Final Approver.
  - **Add additional comments** or **respond directly** to specific notes for clarification.
- Once all feedback is confirmed, either the **Non-Approver** or **Final Approver** can submit the revisions, triggering a new editing cycle.

# Role Based Permissions

## Project Managers

- Manage project members
- Edit project details
- Manage all media files of the project
- Create and send edit requests
- View and download final video
- Approve final video if you are an Admin or has been Set as Approver by an Admin

## Collaborators

- View list of other team members
- Manage their uploaded media files

## Filmers

- Upload, view and delete their files in the project

## Content Reviewers

- View edited video
- View and create edit requests
- View and download final accepted video

# Frequently Asked

**Q: Do all Final Approvers on a project need to sign off?**

**A:** No. Once one Final Approver accepts the video the project will be closed out and the final video will be available for download.

**Q: Who can view and download the final video?**

**A:** All Admins, Project Managers (with and without Final Approver status) and Content Reviewers.



# Questions?

**Jennifer Lopez**

VP Client Success

[jlopez@lucihub.com](mailto:jlopez@lucihub.com)