Using Approval Templates in Publish

If you have an established approval flow with your team, you can set up an approval template to easily save and reuse a configuration of approvers when preparing content for approval. In this article, learn how to set up and use approval templates in Publish.

Note:

For US clients, this feature is accessible to Pro/Premium accounts only. If you are a US client with a Standard account and would like to upgrade your package, contact your Customer Success Manager (CSM) or Brandwatch Support.

Tip:

Need a refresher? Visit our content approval help center article for a quick overview of how it works in Publish.

Creating an approval template

Note:

Only Administrators and Team Leaders in Social Media Management can create, edit, copy, and/or delete approval templates. All users can view existing approval templates.

1. In Publish, click **Approval templates** in the left-hand navigation sidebar.
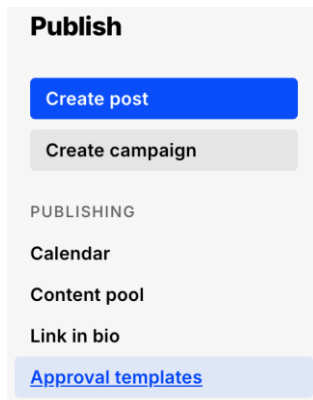
2. In the Approval Templates menu, you will see a list of the existing approval templates your organization has created to date. Click **Create Approval**

Template in the top-right corner to create a new template.

3. The Create Approval Template window will open and allow you to begin adding approvers to start creating your approval workflow.

In the **Add team members as approvers** field, begin typing the name(s) of the user(s) in your organization you would like to add as approver(s), and their name(s) will come up for you to click and add in the dropdown.

After you add an approver to step 1 of the flow, you will see a button to **Add Approval Step** to add additional steps to your approval flow if you wish. When you add multiple approvers to a step, you will see a toggle option to select either **Any** or **All** approvers in that step are required to approve before approvers in the following steps can approve. You can also customize the name of each approval step if desired.


A template can consist of any number of steps and users. When you are finished adding your approvers and approval steps, enter a name for your template in the final **Name** field, then click **Create Template** to save your template.

After saving, you will see your approval template available in the Approval Templates list. There is no limit to the number of approval templates you can create in Publish. At any time, you can copy, edit, or delete your approval template using the icons to the right of the template.

Using an approval template in a post

When creating a post in Publish, you will have the option to select your approval template via the **Approvers** panel in the left side of the post editor. In the **Add Approvers** field, you can search for and select your approval template. When searching, you can hover over the

approval template to get a preview of the approval steps and users included in the template.
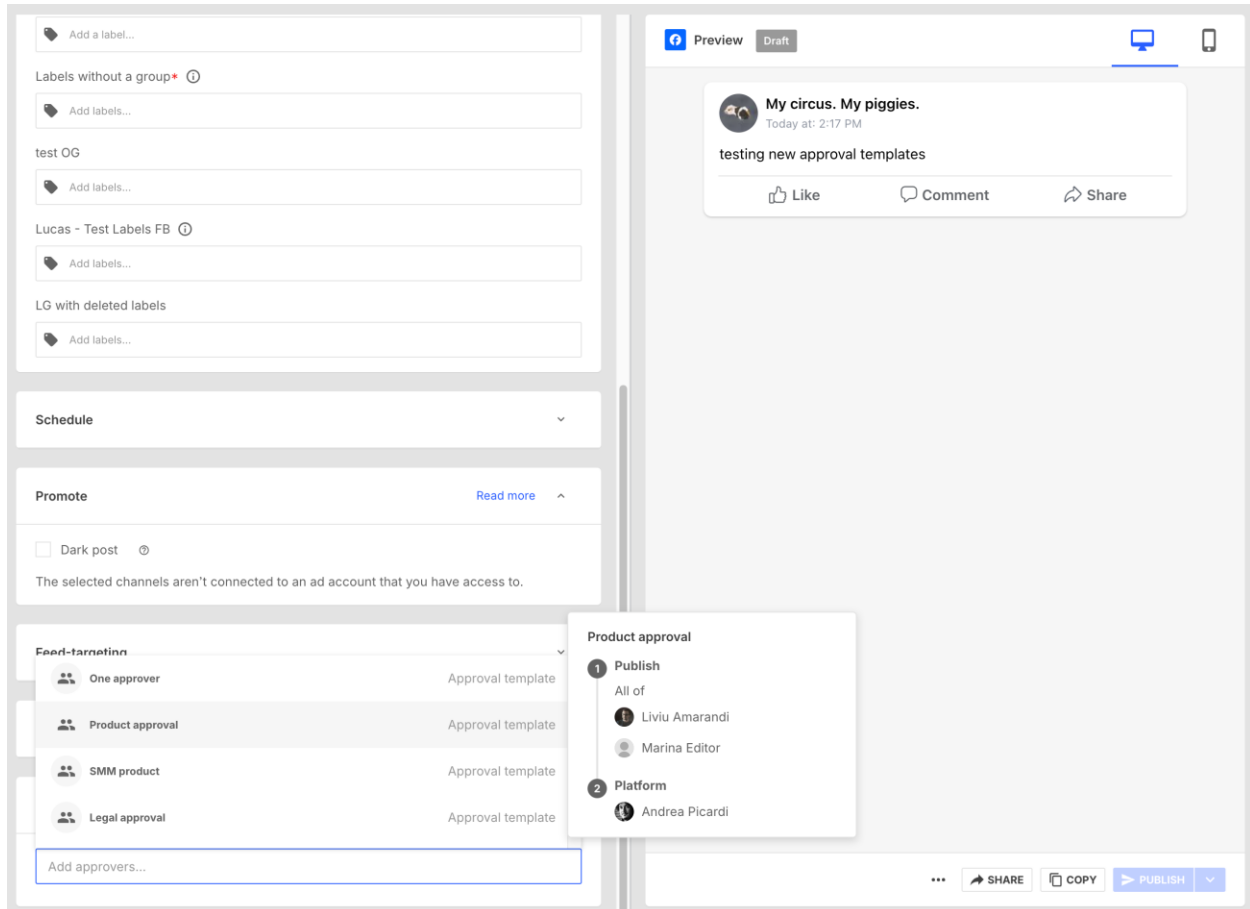
Note:

Only approval templates in which all users in the template have access to approve post content for the respective channel will be visible. Furthermore, if a user in an approval template has been deleted, the deleted approver will need to be replaced before sending the post for approval.

After selecting an approval template, the approval workflow will be created for the post. You have the option to edit the approval template within the post editor, however any changes made will be saved for that post only. To permanently edit an approval template,

edit the template via the Approval Templates menu.

After you submit the post for approval, approvers will be notified according to the approval workflow.