Approving and Denying with PINs

If you need to add an extra layer of authentication to ensure the validity of the approval process, you can enable a PIN system.

This asks users to enter a numeric code before they're allowed to approve or deny a document.

Select an option to learn about setup, including incorporating PINs into your approval process, how to approve or deny with a PIN, and how to set your PIN.

Objectives

- Identify PIN Settings: Choose PIN length and add PIN support to Workflows.

- Confirm or Edit Your PIN: Set or change your PIN.

- Process Approvals with Your PIN: Approve, deny, or recall an approval or denial with your PIN.

Identify PIN Settings

The PIN system only functions for workflow-based approvals. There are only a few things you and your users will need to do to fully support it.

Setting up a PIN system involves four areas:

- setting PIN length in system settings,

- users establishing a PIN in the admin screen,

- choosing a timeout length, and

- accounting for PINs in any workflows you'll want to use of this system.

First, we'll look at the steps that can be completed in the Admin screen. Click Admin, then Site Settings. Select User PIN Length.

Here you can set the length requirement for your system's approval pins. Choose 4 or 6 to determine the required number of digits. Click Save.

Next, let's open the Workflow Designer to incorporate the PIN functionality.

Before you incorporate these changes, you'll want to ask your users to set a PIN, so the system is ready.

This workflow shows an approval process, so I'll open the approval step. Inside of this action, we have a User Approval task. Click the PIN required checkbox, and this workflow will now require users to enter their PIN before they can approve or deny.

We'll click Ok on the task, action, and step, and save our changes.

This workflow is now ready to support PINs, but you'll need to make sure your users create their PINs so the workflow can validate their information.

Setting Up Your PIN

To use a PIN to approve or deny content, you'll need to set one up.

Click Admin, then Choose PIN. If this is your first time entering a PIN, you can leave "Current PIN" blank and enter a four- or six-digit PIN depending on your site settings.

Click Save.

You can always return to this screen and change your PIN later if you'd like. Just enter the old one in Current Pin and set a new one using these fields then click Save.

By default, your PIN number will be remembered after you've used it to approve or deny an item. You can set a preference to change the how long your PIN is remembered.

Now, let's open user preferences. Click Settings. Set this to the length of time you prefer. You can set a minimum of zero to a maximum of thirty minutes. Click Save when you've finished.

You can now approve and deny with your PIN.

Process Approvals with Your PIN

Whether you're in your workflow queue or the retrieve screen, or you're viewing a document, you can approve or deny an item with your PIN.

I'll right click this document in my retrieve screen, and I'll click Approve. Here you can see that I can enter my comments and need to enter my PIN. If I enter an incorrect PIN, I'll see an error telling me that. I'll correct this and move on.

Let's open my workflow queue.

If I approve or deny another item during my timeout window, I won't be asked to enter my PIN. Now I'm going to step away for a minute and we'll come back.

I've got a pair of documents waiting for my approval. While I could approve them here with a right click, I want to review them first, so I'll open them both up.

There's a mistake with the data here, so I'll enter my PIN and click Deny. I'll move on to the next one, and since I just denied the last one, I can just approve.

The same rules for entering your PIN and PIN timeouts apply to recalling an approval or denial as well.

Recap

You now know all you need to know about implementing a PIN system into your existing workflow-based approvals system.

Remember that you can choose a PIN length in system settings, account for your PIN in any workflows that need this extra layer of validation and ask your users to set their PIN and choose a timeout length.

Users can use their PINs to approve or deny as well as recall their approvals or denials.

You can now use the PIN system in any workflow-based approvals.

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