

Preparing Versions for Final Approval and Release Handoffs

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Confirming the version is ready for final approval

Before you send a version forward, open the project workspace in Atloria and go to the **Versions** list. Select the version you just finished reviewing, then check the version details screen carefully. At this stage, you are not looking for draft work anymore—you are confirming that the version record is complete enough for a final decision. If you need a refresher on the earlier review cycle, use [Requesting Review and Handling Version Decisions](#) instead of repeating those steps here.

Start by checking the **Status** shown on the version record. The version should already be in a review-complete or approval-ready state, not in an earlier working state. If the status still suggests active edits or unresolved review work, stop here and finish those items first.

Next, review the version details and make sure the core information is filled in. In practice, that means confirming fields such as the version title, version label, owner, and planned release date are present and accurate. If any of those details are missing or outdated, the final approver may reject the request simply because the release record is incomplete.

Then check whether the version package includes the right content. Open the attached documents or included documentation items and verify that the latest approved revisions are the ones linked to this version. You do not want older drafts or partially updated pages included in the release package.

Also look for any visible review comments, flagged items, or open follow-up notes on the version. If the screen still shows unresolved discussion or pending review concerns, treat the version as not ready for final approval.

[SCREENSHOT: Version details screen showing Status, owner, release date, and attached documentation items]

Resolving outstanding issues before sign-off

Once the version looks complete, move to the part of the version record where review findings, issues, or follow-up items are listed. In Atloria, this is the place to clear anything that could block sign-off. The goal is simple: the final approval record should show that no important questions are still open.

Filter the list so you can focus on items that still need attention, especially anything marked **Open**, **In Progress**, or **Blocked**. These are the entries most likely to delay approval. Read each one and decide whether it has been fixed, accepted, reassigned, or still needs work. If a note says a page was updated, open the related document and confirm the change is actually reflected in the version.

For each item, update the fields that explain its outcome. Use the final disposition, resolution note, and closure status so anyone reviewing the version can see what happened without digging through older comments. Keep these notes specific. For example, if a reviewer asked for a screenshot update or wording correction, the issue entry should clearly show that the change was completed and the item is now closed.

If ownership is unclear, update the **Assignee** field before the version moves forward. A version often gets stuck because everyone assumes someone else is handling the last task. Reassigning the item to the correct contributor or reviewer makes responsibility visible on the screen.

Finally, check the activity history or comment thread tied to the version. You are looking for confirmation that required reviewers saw the final changes and acknowledged them. That confirmation matters when the approver wants proof that review feedback was addressed. For more detail on interpreting comments and statuses, see [Understanding Version Review Feedback and Follow Up](#).

[SCREENSHOT: Issues or findings panel filtered to Open, In Progress, and Blocked items]

Submitting the version for final approval

After the version record is complete and all blocking items are closed, use the version actions menu to start the final approval step. On the version record, select **Submit for Approval**. This moves the version out of review wrap-up and into the formal approval workflow.

1. Open the target version from the **Versions** list.
2. Click **Submit for Approval**.
3. In the approval form, choose the final approver or approval group in the **Approver** field.

4. Confirm any due date or approval deadline shown in the form.
5. Add approval notes that summarize the final review outcome.
6. Submit the request and return to the version details screen to confirm the status changed.

When you fill out the approval form, pay close attention to who is selected as the approver. If Atloria offers both an individual approver and an approval group, choose the option that matches your team's release process. A wrong selection here can leave the version sitting in the wrong queue.

Use the notes area to give the approver the context they need. Include a short summary of resolved issues, any important review decisions, and any release conditions that still need to be checked after approval. Keep the note focused on what changed and what the approver should know before signing off.

After submission, return to the version status indicator and watch for the workflow state. Depending on the decision, Atloria may show the version as **Approved**, **Rejected**, or **Needs Changes**. If the status does not update as expected, reopen the approval details and confirm the request was sent correctly. For a broader explanation of approval decisions, see [Managing Version Review Decisions and Approvals](#).

[SCREENSHOT: Submit for Approval form with Approver, due date, and approval notes]

Handing off approved documentation for access validation

Approval does not mean the version is ready to release immediately. After the version is approved, open the handoff area on the version record and move the package to access validation. This step makes sure the approved content is visible only to the right audiences before export or release.

1. Open the approved version from the **Versions** list.
2. Go to the handoff or release section on the version record.
3. Assign the package to the person responsible for access validation.
4. Review audience, role, or permission settings on the approved documents.
5. Add handoff notes describing what must be tested before release.
6. Mark the access validation checkpoint as complete when testing is finished.

In the handoff notes, be specific about where the approved documentation will appear. If the version is intended for a particular audience, portal, or user group, record that

clearly so the validator knows what to test. If restricted pages are included, mention them directly in the notes so they are checked before release.

This is also the right time to confirm that the approved documents match the intended visibility rules. Open the related documents and review any audience or access settings attached to them. If a page should be limited to a certain reader group, make sure that restriction is still in place on the approved version.

When validation is complete, update the checkpoint on the version record so everyone can see that access review is done. If you need more help with visibility checks, use [Managing Version Visibility and Reader Access](#) and [Validating Version Access Before Sharing or Export](#).

[SCREENSHOT: Approved version handoff panel with assignee, notes, and access validation checkpoint]

Preparing exports and release-ready deliverables

Once access validation is complete, create the release package from the approved version. In Atloria, start from the approved version record and use the **Export** action. This is where you generate the files or deliverables that will be shared, archived, or passed to the release team.

1. Open the approved version record.
2. Click **Export**.
3. Choose the required output format for the release.
4. Confirm the export is based on the approved version, not a draft.
5. Save or store the exported deliverables in your team's release location.
6. Link the completed export back to the version record and update the handoff status.

Before you confirm the export, check that the package includes the final approved files, any required attachments, and the correct version identifiers. The version label should match the approved release record. If the export preview or summary shows draft content, stop and verify which revision is selected before continuing.

After the export finishes, store the deliverables in the release location your team uses for handoff. Then return to the version record and add the export reference so there is a clear trail from the approved version to the release files. This traceability matters later if someone needs to confirm exactly what was delivered.

Finally, update the handoff or release status on the version so project administrators can see that export preparation is complete. If your next step is release packaging or publication, related guidance is available in [Controlling Version Sharing and Export Readiness](#) and [Publishing a Project from Setup to Public Release](#).

[SCREENSHOT: Export action on an approved version with format selection and linked deliverables]

Fixing approval and handoff problems

If Atloria does not let you move forward, the version record usually tells you what is missing. Start with the most visible blocker on the screen and work from there rather than resubmitting repeatedly.

Problem you see	What to check in Atloria	What to do next
You cannot submit the version for approval	Missing version details, incomplete attachments, or unfinished review tasks	Reopen the version record and complete the required fields, confirm the right documents are attached, and close remaining review work
Approval stays pending	Wrong approver, wrong approval group, or incorrect due date	Open the approval request, verify the Approver field and deadline, then correct and resubmit if needed
Access validation fails	Audience, role, or permission settings do not match the release target	Review document visibility and audience settings on the approved version, then repeat the validation check
Export is missing content	The export was created from a draft revision instead of the approved version	Return to the version record, confirm the approved revision is selected, and generate the export again

If a version returns as **Needs Changes** or **Rejected**, do not treat it as a new review cycle from scratch. Open the decision details, read the approval notes, and correct only the items that blocked sign-off. Then resubmit the version through the same approval action.

When the problem is tied to access or visibility, compare the approved version's audience and permission settings with the intended release destination. Many handoff issues happen because the content is correct, but the release target expects a different reader group than the one assigned on the version.

For export problems, the safest fix is to regenerate the deliverable only after confirming the approved version label and included documents on the version record.

If you need help with access or export checks, use [Validating Export Readiness for Documentation Versions](#).

Overview

This guide covers the final stretch between a completed review and a release-ready handoff in Atloria. At this point in the workflow, the version has already gone through review and decision handling. Your job now is to make sure the version record is complete, all remaining issues are closed, the final approver receives the right context, and the approved package is handed off cleanly for access checks and export.

The process in Atloria usually happens across a few connected areas on the version record: the **Versions** list, the version details screen, the approval action, the handoff or release section, and the **Export** action. You will move between these areas to confirm readiness, resolve blockers, submit for approval, assign access validation, and prepare final deliverables.

This guide does not repeat the earlier review request process. If you still need to send a version out for review or respond to reviewer decisions, go back to [Requesting Review and Handling Version Decisions](#). If you are still checking whether the version is generally ready for approval, [Preparing Versions for Final Approval](#) is the better starting point.

Use this guide when the version is nearly finished and you need a reliable handoff path from approved documentation to release preparation. The focus is on what you do in Atloria's screens and fields so the approval trail, validation checks, and export record all stay aligned.

Prerequisites

Before you start the final approval and handoff steps in Atloria, make sure the version and its supporting records are already in good shape. You should have the following in place:

- A project with an existing entry in the **Versions** list
- A version that has already completed its main review cycle
- Access to open the version details screen and use **Submit for Approval**
- Permission to view or update issue lists, comments, and handoff details on the version

- The final set of documents attached to the version package
- Required version details completed, including title, version label, owner, and planned release date
- Review comments, findings, or follow-up items already addressed or ready to close
- A known final approver or approval group for the release
- A person identified to handle access validation after approval
- A release destination or storage location your team uses for exported deliverables

It also helps if you already know which audiences, reader groups, or restricted content rules apply to the approved documentation. That makes the access validation step much faster because the handoff notes can be specific.

If any of these items are still missing, pause here and finish the earlier workflow first. The most useful related guides are [Preparing Versions for Review and Approval](#), [Managing Version Review Requests and Decisions](#), and [Preparing Versions for Final Approval](#). From here, your next work usually continues into release controls, publishing, or export validation depending on how your team releases documentation.