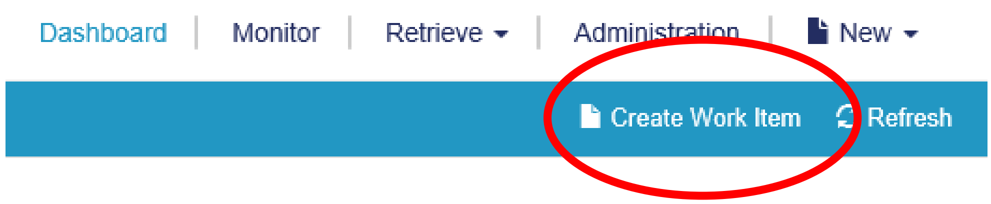
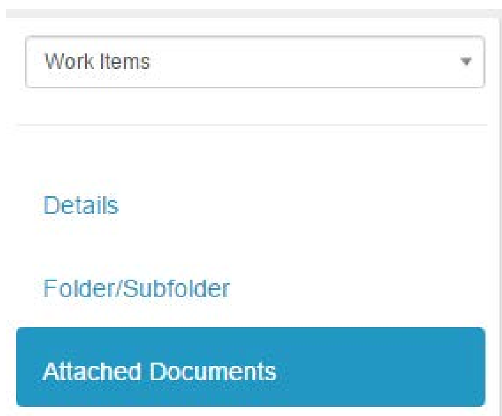
1. From the Dashboard click Create Work Item:

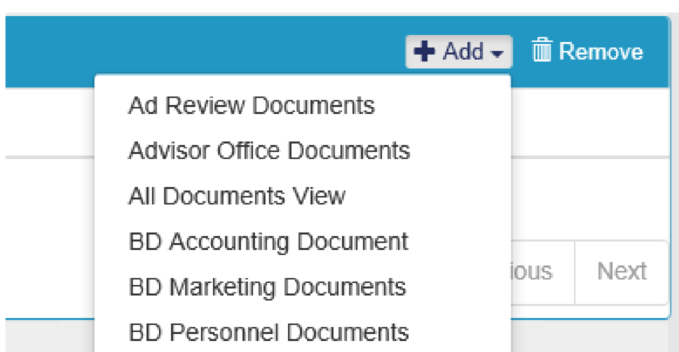


2. Choose “AR – Advertising” from the request type

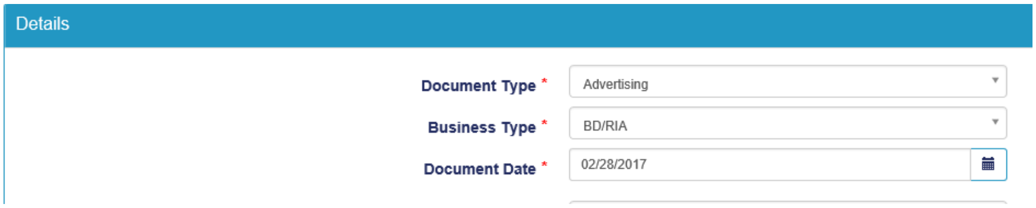
3. Click on Attached Documents or scroll down to the section of the Work Item titled Attached Documents.



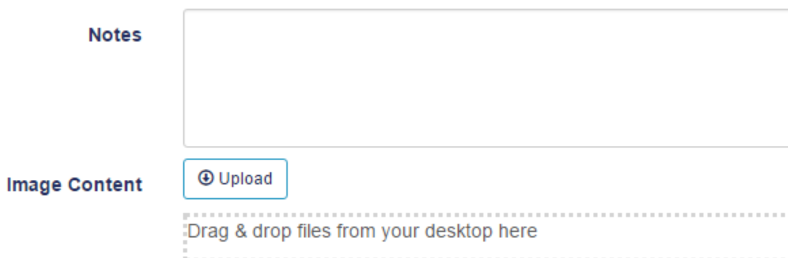
4. Click on the Add button and select Ad Review Documents



5. Click the Create New button at the top of the screen. This will allow you to attached a document to your submittal. You will need to add a document type, document date, document category and description to the submittal.



You will also be able to upload the document from this screen by scrolling to the bottom where you will see the Image Content and Upload button.



6. You will also need to attach the proper Advisor Folder to the Work Item. You will see the option labeled "Parent Object". Click the Add link and choose Ad Review Folders.

You will then choose your name from the list provided by clicking the box to the right and clicking Select.

7. Click the Save link. This will take you back to the original Work Item screen where you will save the entire Work Item by clicking the Save button.

8. Add any other documents you might have the same way, and click "Submit" to finish the request and send it to the back office for review.

Please note that when doing an Ad Review adding a Client Folder/Subfolder is not a necessary step as this is not client or account specific. You will add the rep information under Parent Object.

Unlike new business and service requests, this does not go to the Pending Advisor Review step – when you click Submit on the request it goes right to the back office for principal review.