



Set up an approval process in Knowledge Base

An approval process can be set up in Knowledge Base categories to ensure that some users can create draft articles that will be made live only after others approve them.

This is done by differentiating the available permissions so that some users can only create drafts, while others can publish or approve.

This is an optional feature, as it's fine to just split out permissions between those who can view news vs those who can add and edit all articles.

Setting up an approval process in a category

1. Head to Applications > Admin > Knowledge Base > Categories
2. Click the title of the category you wish to set up the approval process up in

A screenshot of the 'Admin > Knowledge Base > Categories' page. The page has a left sidebar with 'Categories' selected. The main content area shows a table with columns for 'Category Name', 'Articles', and 'Questions'. There is a '+ Add a Category' button in the top right. Each row in the table has a trash icon for deletion.

Category Name	Articles	Questions	
Demo Processes	21	1	🗑️
General	4	1	🗑️
Human Resource	3	-	🗑️
InfoCapture	8	2	🗑️
Intranet Advice	8	-	🗑️
Professional Services	2	1	🗑️
Uncategorised	-	-	

3. Scroll to the permissions area on the next screen.

Enter your chosen users/roles/groups and apply permissions across them to configure an approval process. Information on how to split out the permissions is below.

Admin > Knowledge Base > Categories > **Edit Category**

Edit Category

Parent Category: - no parent-

Category name: Demo Processes

Description:

Permissions

Start typing to add... Browse Remove

All registered
Role: Administrators

View

Create an Article

Publish an Article

Edit all Articles

Delete all Articles

Ask a Question

Edit all Questions

Delete all Questions

[View effective permissions...](#)

Category Expert: Browse

Experts can Endorse articles - this displays an endorsement on the article view

Only allow Category Experts to respond to questions

- Ensure some users can only create draft articles for others to publish in the channel

Permissions

Start typing to add... Browse Remove

All registered
Role: Administrators
Group: Marketing

View

Create an Article

Publish an Article

Edit all Articles

Delete all Articles

Ask a Question

Edit all Questions

Delete all Questions

[View effective permissions...](#)

Give these users/roles/groups the 'View' and 'Create an article' permissions only.

In this case, those in the Marketing group can only create drafts for approval in this category.

- Ensure some users can approve the drafts that others create as drafts

Permissions

Start typing to add... Browse Remove

All registered
 Group: Marketing
 Role: Administrators
 Role: Managers

View
 Create an Article
 Publish an Article
 Edit all Articles
 Delete all Articles
 Ask a Question
 Edit all Questions
 Delete all Questions

[View effective permissions...](#)

Give any users/roles/groups all permissions, crucially the 'Edit all articles' permission.

In this example, users in the 'Manager' or 'Administrator' roles can access drafts created by other users.

- Ensure some users can freely publish their own articles in the category

Permissions

Start typing to add... Browse Remove

Group: Marketing
 Role: Administrators
 Role: Managers
 Group: Franchisees

View
 Create an Article
 Publish an Article
 Edit all Articles
 Delete all Articles
 Ask a Question
 Edit all Questions
 Delete all Questions

[View effective permissions...](#)

Generally, there will be users/roles/groups that are not part of the approval process, and we want to publish their articles outright as they are trusted.

In these cases, give users/roles/groups the first 3 permissions of 'View', 'Create an Article' and 'Publish an article'.

Also give them 'Edit all articles' if appropriate, but this is separate from their own articles, which they are allowed to make live through the 'public' permission.

In this example, users in the 'Franchisee' group can publish their own articles and are not part of finalising others' drafts.

Creating draft articles

1. A user with only 'View' and 'Create an article' permissions will see the below notices when creating a new article in the category:

Knowledge Base > Add Article

Language: English options

Article Title*: New products coming in 2027!

Category: Demo Processes x

You don't have permission to publish to this category: Once you update this article the status will change to DRAFT

Tags: popular tags: intranet, claromentis, microsoft, excel, social

Author: Nicola Gibson x Browse

Created date: 05-06-2026

Article Cover/Thumbnail: Upload image

Embed Video (optional): Valid 'iframe' code only

Description: Source, Bold, Italic, Underline, Strikethrough, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Table, Table border, Table border style, Table border width, Table border color, Table border collapse, Table border style, Table border width, Table border color, Table border collapse, Styles, Format, Font, Font Size, A, A, A, A

test

body

Enable Commenting

Status: You don't have permission to publish this article: The status of this article will be set to DRAFT

Add Article Cancel

2. Once they create it with the 'Add article' button, it will appear listed for those with 'Edit all articles' rights. (They will also appear to administrators on the [admin side](#) of the application)

The screenshot shows a Knowledge Base interface. On the left is a navigation menu with categories like 'Demo Processes', 'General', 'Human Resource', 'InfoCapture', 'Intranet Advice', and 'Professional Services'. The main content area displays several articles: 'Bug Tracker', 'Employee Of The Month', 'Exit Interview', 'Support Tickets', and 'BPM Overview'. Each article includes a summary, a comment count, and a 'Last modified' date. On the right, there is a search bar and a 'Recent questions' section. A red box highlights the 'Draft Articles' section, which contains two items: 'New products coming in 2027!' (dated 5 June 2026) and 'Training and Promotion' (dated 16 October 2023).

3. The article can be reviewed/updated and eventually published by a user with 'Publish an article' permission.

Enable Commenting

Status Draft Publish Archive

Update Article
Cancel