

Documents: Workflows (Group Approval)

What's possible within Documents Workflow?

Within the Documents application, it is possible to create workflow rules to setup any of the following:

- Create states for documents, such as *Awaiting Approval* and *Approved*.
- Set the transitions between states to be manual, automatic based on one or multiple approvals, or automatic based on a time having elapsed or a date having been reached.
- Specify exactly who should have to approve documents
- Request feedback from approving users as the documents move through the workflow
- Move the document to a specified folder as the document moves between states
- Specify 'workflow managers'. Documents can be set to Read-Only except for these users.
- Send notifications of changes to Workflow managers and document owners.

An unlimited number of workflows can be created, and workflows are applied to folders so that any newly uploaded items must go through your specified workflow process.

It is recommended that a user be an [application administrator](#) of both the Workflow and Documents applications so they can follow all the steps below.

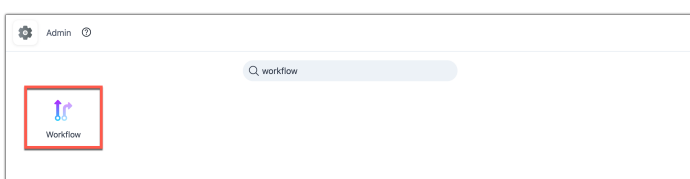
Example Workflow 1: Group approval

Scenario: I want any documents within my 'Support and Maintenance Documents' folder to:

- a. Require approval from all three heads of department
- b. Be visible but read-only to users while it's awaiting approval
- c. Start in a state of 'Unapproved' and move to a state of 'Approved'

Steps

1. Head to Admin > Workflow. If you don't see Workflow, you will need to ensure you are set as an [application administrator](#) for it by a [sysadmin](#) first.



2. Click 'Add New Category'. Create a category called 'Support' and assign 'Create Workflow' permissions to a user [Role or Group](#) responsible for edits to the workflow itself, e.g. the group 'Support Managers' in this example.

Admin > Workflow Panel

List of available workflows

+ Add new category

Documents with workflow

Admin > Workflow Panel > Add/Edit Category

Name

Support

Description

Permissions

Start typing to add...

Browse

Remove

Group: Support Managers

Role: Administrators

☒ View Workflow Details

☒ Create Workflow

☐ Workflow managers

View effective permissions...

Add/Update

Delete

3. Enter the People group or role that encapsulates the 3 heads of department and give them 'View workflow details' and 'Workflow Managers' permissions (the latter permission will ensure the approval fields appear to them for uploaded files)

Admin > Workflow Panel > Add/Edit Category

Name

Support

Description

Permissions

Start typing to add...

Browse

Remove

Group: Support Managers

Role: Administrators

Group: Heads of Department

☒ View Workflow Details

☐ Create Workflow

☒ Workflow managers

View effective permissions...

Add/Update

Delete

4. Save with 'Add/Update'. Now click 'Add New Workflow'. Add it into the category you have just created, and call it 'All 3 heads to approve'

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What are you looking for?

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E-Form Examples

Learning

Projects

Book a Demo

Category successfully added

Admin > Workflow Panel

List of available workflows

+ Add new workflow

+ Add new category

Documents with workflow

Support

Admin > Workflow Panel > Workflow Diagram

Add new workflow

Category

Support

Workflow Name

All 3 heads to approve

Description

Copy workflow from

-- None --

Add/Update

5. Save with 'Add/Update'. Scroll down. Now create two states, one for 'Unapproved' and one for 'Approved', picking colours to match their nature, such as orange and green. Click 'save' to apply.



6. On the 'Unapproved' line of the table containing the two states, click the pencil on the right to edit the action.

7. Around the middle of the page, tick the boxes for 'Send notification to workflow manager upon changes' and 'Make document read only'.

The first option ensures users in the Group 'Heads of department' who we want to approve uploaded files are notified when uploads occur (so they know they await approval!)

The second ensures that after upload to our chosen folder (we will set this in just a moment), a file is read-only until approval.

8. Scroll down. Under 'Transition', set the next state to 'Approved', and set the transition type to "On All Approve". Click 'Save Transitions'.

9. You will see a link has now appeared - 'View/Edit responsible persons'. Click it, and add in the users who will need to approve, such as a user group called 'Heads of Department' into the new tab that opens. Click 'Apply permissions' to save.

Action: None

Transition

Next state: Approved

Transition type: On All Approve

[View/Edit responsible persons](#)

Next state: ----

Transition type: Manual

Save transitions

Transitions updated

Add/Update Delete

Documents > List of available workflows > Users list for transition

Start typing to add... Browse Remove

Group: Heads of Department

View matching users...

Apply permissions Close

10. Close the tab and return to the workflow page. Click 'Add/update' to save the changes you have made to the workflow.

Transition

Next state: Approved

Transition type: On All Approve

[View/Edit responsible persons](#)

Next state: ----

Transition type: Manual

Save transitions

Transitions updated

Add/Update Delete

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What are you looking for?

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State saved

Admin > Workflow Panel > Workflow Diagram

Edit workflow

Category: Support

Workflow Name: All 3 heads to approve

Description:

Permissions

☒ Inherit rights from parent folder

Start typing to add... Browse Remove

Group: Support Managers

Role: Administrators

11. Head to the admin side of Documents (Admin > Documents > Manage Documents List) If you don't see Documents on the admin side, you will need to ensure you are set as an [application administrator](#) for it by a [sysadmin](#).

12. Find the folder you wish to apply this workflow to, in this example 'Support and Maintenance Documents'. Edit its properties.

Admin

Admin > Documents > Documents list

DOCUMENTS

Manage documents list

UTILITIES

Documents import

Documents export

Trash can

Documents reports

Documents permissions report

CONFIGURATION

General configuration

Metadata

Record types

Templates

Root

Collapse all Expand all

Select view: Default

	All	Name	Size	Owner	Last modified	Description
	<input checked="" type="checkbox"/>	Root				
	<input type="checkbox"/>	Discussions			15-08-2016 15:04	
	<input type="checkbox"/>	Document Library		Claramentis Administrator	12-06-2025 12:40	
	<input type="checkbox"/>	Drop Zone		Michael Christian	10-07-2025 11:11	Document Drop Zone to share with everyone using uploader compo...
	<input checked="" type="checkbox"/>	Support and Maintenance Documents		Claramentis Administrator	11-07-2025 11:59	

[Edit properties](#)

[View/edit permissions](#)

13. Select the workflow 'All 3 heads to approve', and click 'Update Folder Properties'.

- Each can provide their approval.
- Once all 3 approvals have been applied, the document will become 'live' and those with permissions to check it out can do so

Created on 11 July 2025 by [Hannah Door](#). Last modified on 16 July 2025
Tags: [documents](#), [workflow](#), [automation](#), [approvals](#)