

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:

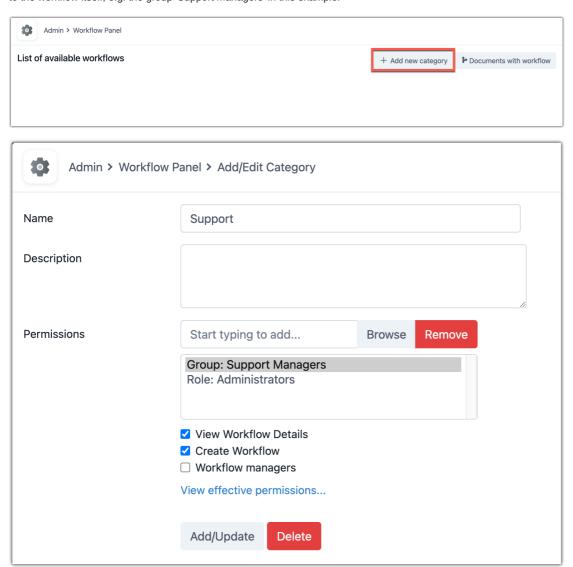
- a. Require approval from all three heads of department
- b. Be visible but read-only to users while it's awaiting approval
- $\boldsymbol{c}.$ Start in a state of 'Unapproved' and move to a state of 'Approved'

Steps

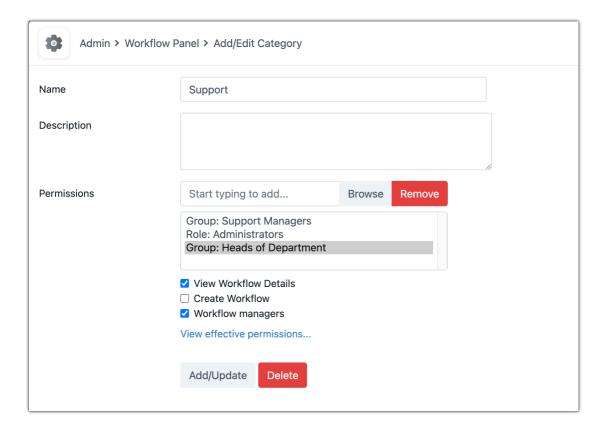
1. Head to Admin > Workflow. If you don't see Workflow, you will need to ensure you are set as anapplication administrator for it by a sysadmin first.



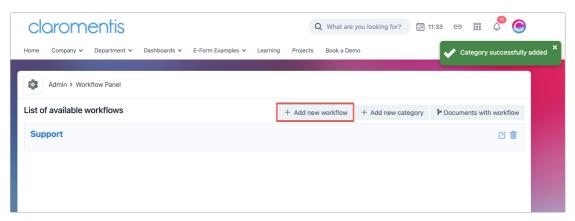
2. Click 'Add New Category'. Create a category called 'Support' and assign 'Create Workflow' permissions to a userRole or Group responsible for edits to the workflow itself, e.g. the group 'Support Managers' in this example.

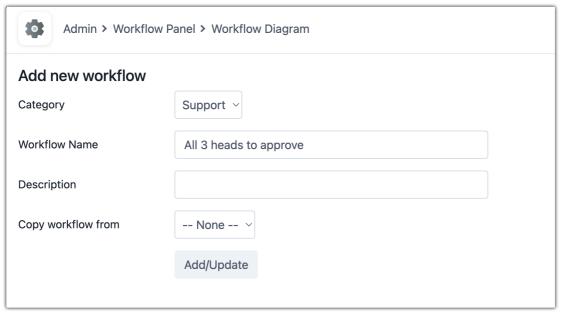


3. Enter the People group or role that encapsulates the 3 heads of department and give them 'View workflow details' and 'Workflow Managers' permissions (the latter permission will ensure the approval fields appear to them for uploaded files)



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

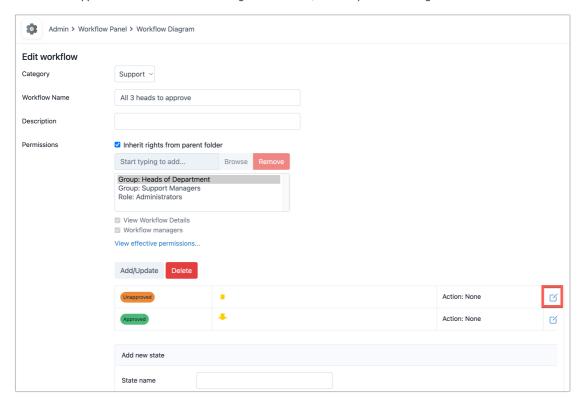




5. Save with 'Add/Update'. Scroll down. Now create two states, one for 'Unapproved' and one for 'Approved', picking colours to match their nature, such as orange and green. Click 'save' to apply.



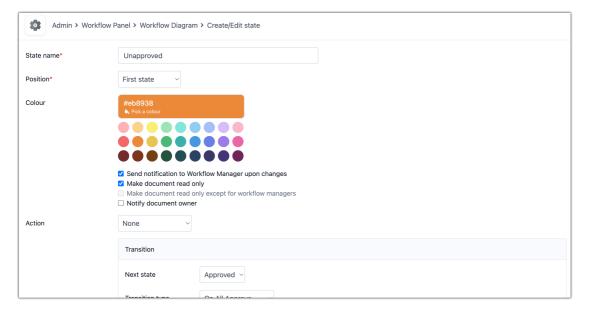
6. On the 'Unapproved' line of the table containing the two states, click the pencil on the right to edit the action.



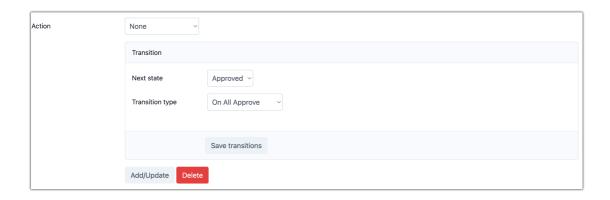
7. Around the middle of the page, tick the boxes for 'Send notification to workflow manager upon changes' and 'Make document read only'.

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!)

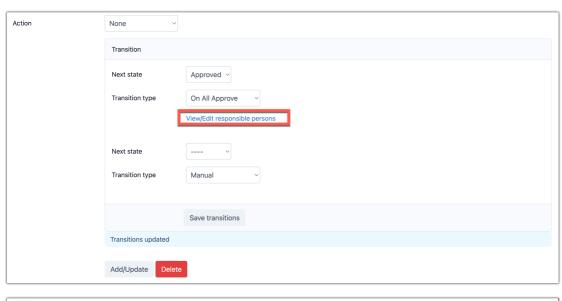
The second ensures that after upload to our chosen folder (we will set this in just a moment), a file is read-only until approval.



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

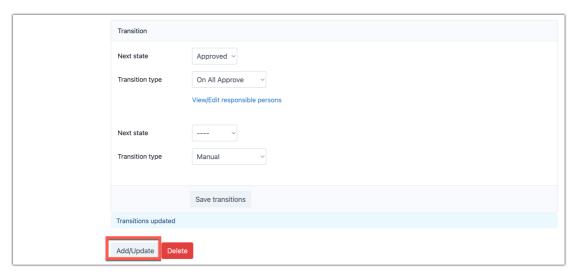


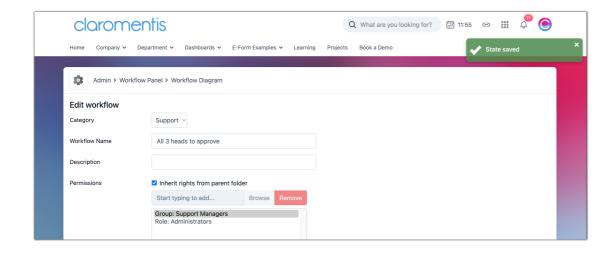
9. You will see a link has now appeared - 'View/Edit responsible persons'. Click it, and add in the users who will need to approve, such as a user group called 'Heads of Department' into the new tab that opens. Click 'Apply permissions' to save.



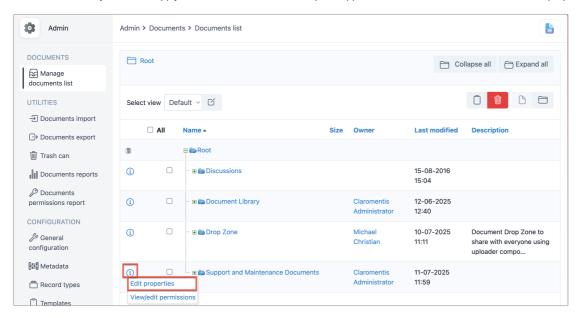


10. Close the tab and return to the workflow page. Click 'Add/update' to save the changes you have made to the workflow.

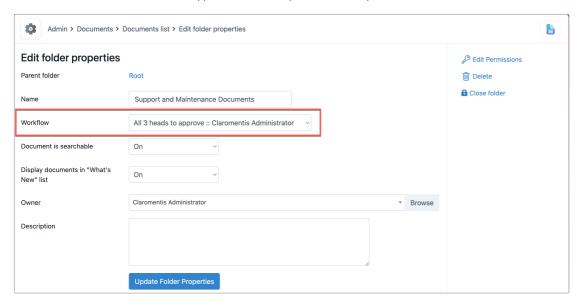




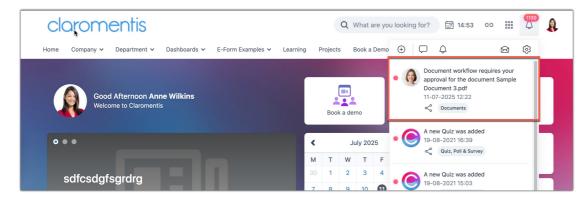
- 11. Head to the admin side of Documents (Admin > Documents > Manage Documents List) If you don't see Documents on the admin side, you will need to ensure you are set as an application administrator for it by a sysadmin.
- 12. Find the folder you wish to apply this workflow to, in this example 'Support and Maintenance Documents'. Edit its properties.



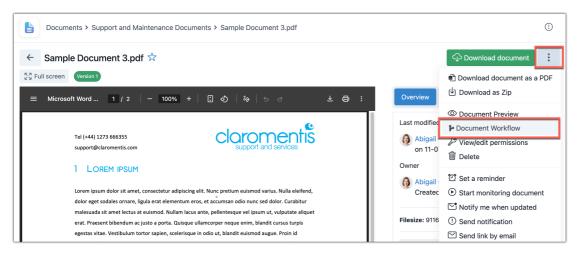
13. Select the workflow 'All 3 heads to approve', and click 'Update Folder Properties'.



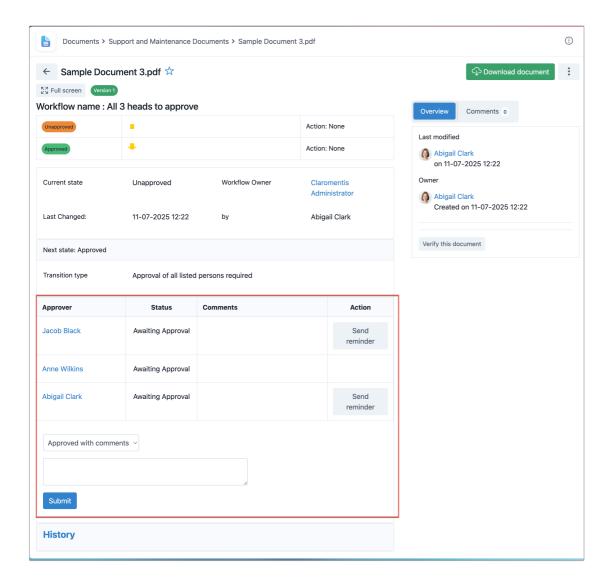
- Have a user with permissions to upload to "Support and Maintenance Documents' upload a file there.
- Once uploaded, the file will be read only (there is no checkout button against it for anyone)
- The users within the Group 'Heads of department' will all be notified that the file awaits their approval.



- Each approver can follow the link in the notification to the document, click the 3 dots and 'document workflow'.



- From here, they can view the current approval status and the other users who have yet to approve.



- 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

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