

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.

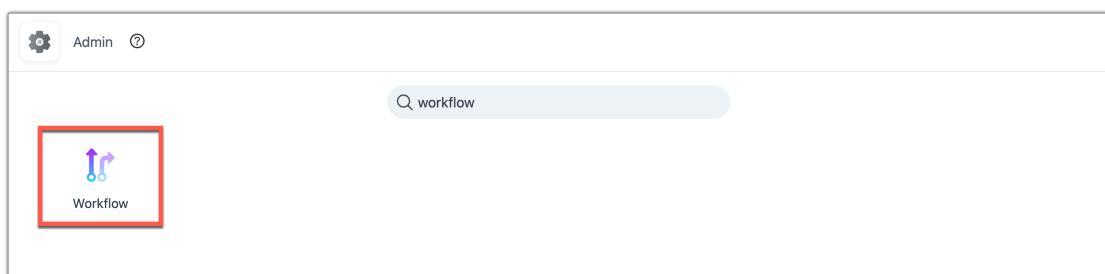
Example Workflow 1: Group approval

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.

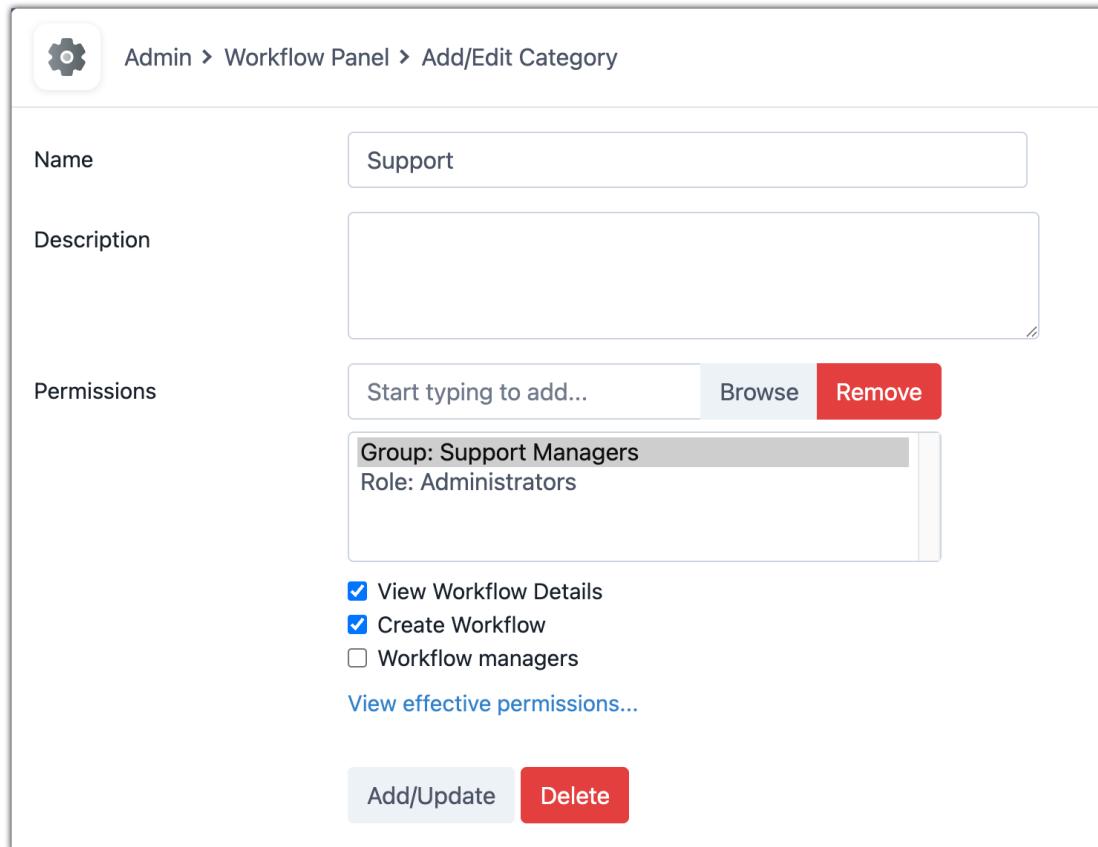


Admin > Workflow Panel

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	<input type="text" value="Start typing to add..."/> <input type="button" value="Browse"/> <input type="button" value="Remove"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Group: Support Managers Role: Administrators Group: Heads of Department </div> <p> <input checked="" type="checkbox"/> View Workflow Details <input type="checkbox"/> Create Workflow <input checked="" type="checkbox"/> Workflow managers </p> <p>View effective permissions...</p>
<input type="button" value="Add/Update"/> <input type="button" value="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'

claromentis

What are you looking for? 11:33

Home Company Department Dashboards E-Form Examples Learning Projects Book a Demo

Category successfully added

Admin > Workflow Panel

List of available workflows

+ Add new workflow + Add new category 1 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 --
<input type="button" value="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.

Please download the file [video/mp4](#)

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

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...

Group: Heads of Department
Group: Support Managers
Role: Administrators

View Workflow Details
 Workflow managers
[View effective permissions...](#)

Unapproved	■	Action: None <input checked="" type="checkbox"/>
Approved	■	Action: None <input checked="" type="checkbox"/>

[Add new state](#)

State name:

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.

Admin > Workflow Panel > Workflow Diagram > Create/Edit state

State name*: Unapproved

Position*: First state

Colour: #eb8938

Send notification to Workflow Manager upon changes
 Make document read only
 Make document read only except for workflow managers
 Notify document owner

Action: None

Transition

Next state: Approved

Transition type:

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

Action

Transition

Next state

Transition type

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

Transition

Next state

Transition type

Next state

Transition type

Transitions updated

Documents > List of available workflows > Users list for transition

Group: Heads of Department

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

Transition type

Next state

Transition type

Transitions updated

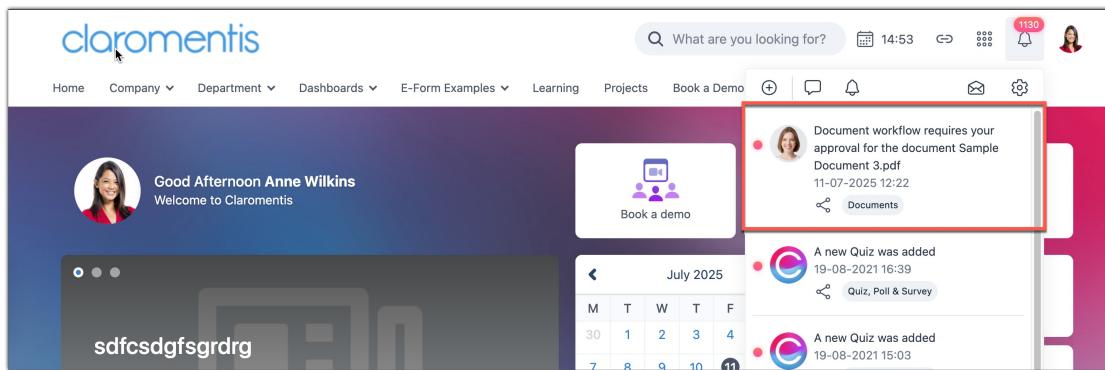
11. Head to the admin side of Documents (Admin > Documents > Manage Documents List) If you don't see Documents on the admin side, you will need to ensure you are set as an [application administrator](#) for it by a sysadmin.

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'.

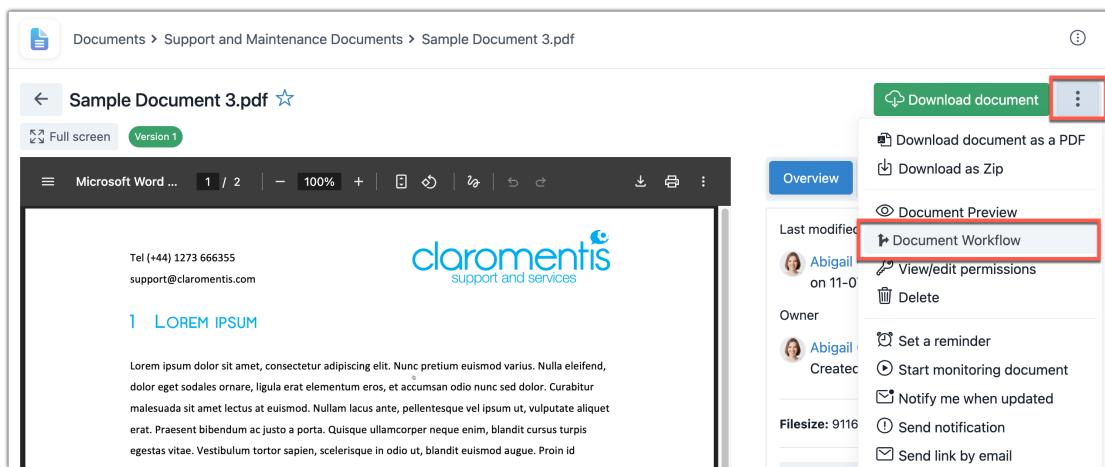
14. Test the functionality.

- 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.



The screenshot shows the Claromentis home page. At the top, there is a search bar, a clock showing 14:53, and a notification badge with the number 1130. Below the header, there are navigation links: Home, Company, Department, Dashboards, E-Form Examples, Learning, Projects, Book a Demo, and a plus sign for creating new items. A sidebar on the left displays a user profile (Good Afternoon Anne Wilkins) and a welcome message. The main content area features a "Book a demo" button and a calendar for July 2025. A red box highlights a notification in the top right corner: "Document workflow requires your approval for the document Sample Document 3.pdf" (11-07-2025 12:22, Documents). Below the calendar, there are two more notifications: "A new Quiz was added" (19-08-2021 16:39, Quiz, Poll & Survey) and "A new Quiz was added" (19-08-2021 15:03, Quiz, Poll & Survey).

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



The screenshot shows a document view for "Sample Document 3.pdf". The left side shows the document content in Microsoft Word format, including contact information and a sample paragraph. The right side shows the "Overview" panel with details like "Last modified" (Abigail on 11-07-2025), "Owner" (Abigail), and "Filesize: 9116". A red box highlights the "More options" menu (three dots) and the "Document Workflow" option in the dropdown menu, which is also highlighted with a red box. Other options in the menu include "Download document", "Download document as a PDF", "Download as Zip", "Document Preview", "View/edit permissions", "Delete", "Set a reminder", "Start monitoring document", "Notify me when updated", "Send notification", and "Send link by email".

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

Documents > Support and Maintenance Documents > Sample Document 3.pdf

Sample Document 3.pdf 

 Full screen  Version 1

Workflow name : All 3 heads to approve

Unapproved		Action: None
Approved		Action: None

Current state: Unapproved Workflow Owner: Claromentis Administrator

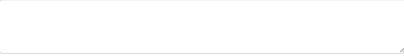
Last Changed: 11-07-2025 12:22 by: Abigail Clark

Next state: Approved

Transition type: Approval of all listed persons required

Approver	Status	Comments	Action
Jacob Black	Awaiting Approval		
Anne Wilkins	Awaiting Approval		
Abigail Clark	Awaiting Approval		

Approved with comments 





History

Overview  0

Last modified

 Abigail Clark on 11-07-2025 12:22

Owner

 Abigail Clark Created on 11-07-2025 12:22



- 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 12 November 2025

Tags: [documents](#), [workflow](#), [automation](#), [approvals](#)