Link to article: https://discover.claromentis.com/knowledgebase/articles/412

Documents: Workflows

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.

Example Workflow 1: Group approval

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

1. Require approval from all three heads of department
2. Be visible but read-only to users while it's awaiting approval
3. Start on 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 administrator.

2. Click 'Add New Category'. Create a category called 'Support*'* and assign 'Create Workflow' permissions to a user group such as *Support Managers.*

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

4. Now create the two states of 'Unapproved*'* and 'Approved*',* picking colours to match such as orange and green.

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

6. Around the middle of the page, tick the box 'Make document read only'

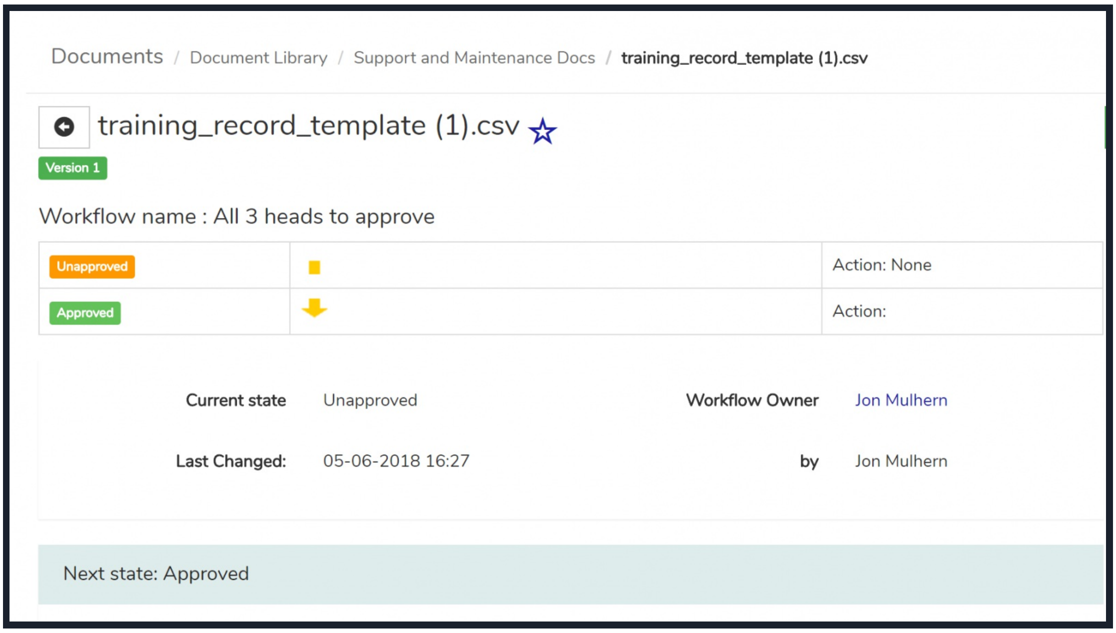
7. Under 'transition', set the next state to 'Approved*',* and set the transition type to "On All Approve". Click 'Save Transitions'.

8. 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'.

9. Save to close the window, and click add/update to save the changes you have made to the workflow.

10. Now head to Admin > Documents > Manage Documents List and find the folder we wish to apply this workflow to, *Support and Maintenance Documents.* Edit its properties.

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



Documents / Document Library / Support and Maintenance Docs / **training_record_template (1).csv**

training_record_template (1).csv ☆

Version 1

Workflow name : All 3 heads to approve

Unapproved	■	Action: None
Approved	⬇	Action:

Current state Unapproved

Workflow Owner Jon Mulhern

Last Changed: 05-06-2018 16:27

by Jon Mulhern

Next state: Approved

Image 1: Any documents added to that folder will be read-only until they're approved by all of the heads of the department.

Example Workflow 2: Moving old documents

Scenario: I want any documents within my *Recent Sales Documents* folder to automatically move into my *Old Sales Documents* folder after six months

Steps

1. Head to Admin > Workflow. If you don't see Workflow, you will need to ensure you are set as an administrator.

2. Click 'Add New Category'. Create a category called *Sales* and assign 'Create Workflow' permissions to a user group such as *Sales Managers.*

3. Save. Now click 'Add New Workflow'. Add it into the category you have created, and call it 'Move out documents older than 6 months'

4. Now create the two states of 'Recent Document' and 'Older Document', picking colours to match such as green and grey.

5. On the 'Recent Document' line of the table containing the two states, click the pencil on the right to edit the action.

6. Under 'Transition', set the next state to 'Older Document', set the transition type to "On Time Elapse", and set it to 180 days.

7. Click Add/Update to save the changes you have made to the workflow.

8. On the 'Older Document' line of the table containing the two states, click the pencil on the right to edit the action.

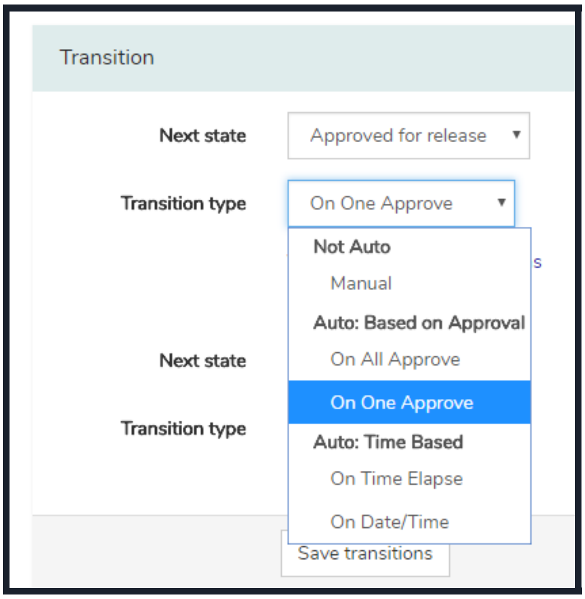
9. Set the Action to be 'Move to a folder'. Click 'Choose folder' and select the 'Old Sales Documents' folder.

10. Click Add/Update to save the changes you have made to the workflow. On the next screen click Save.

11. Now head to Admin > Documents > Manage Documents List and find the folder we wish to apply this workflow to, 'Recent Sales Documents'. Edit its properties.

12. Select the workflow 'Move out documents older than 6 months', and click Update Folder Properties.

Screenshots

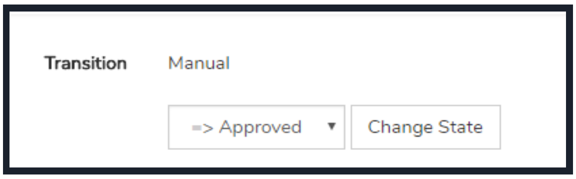

Transition

Next state: Approved for release

Transition type: On One Approve

Not Auto
Manual
Auto: Based on Approval
On All Approve
On One Approve
Auto: Time Based
On Time Elapse
On Date/Time
Next state
Transition type
Save transitions

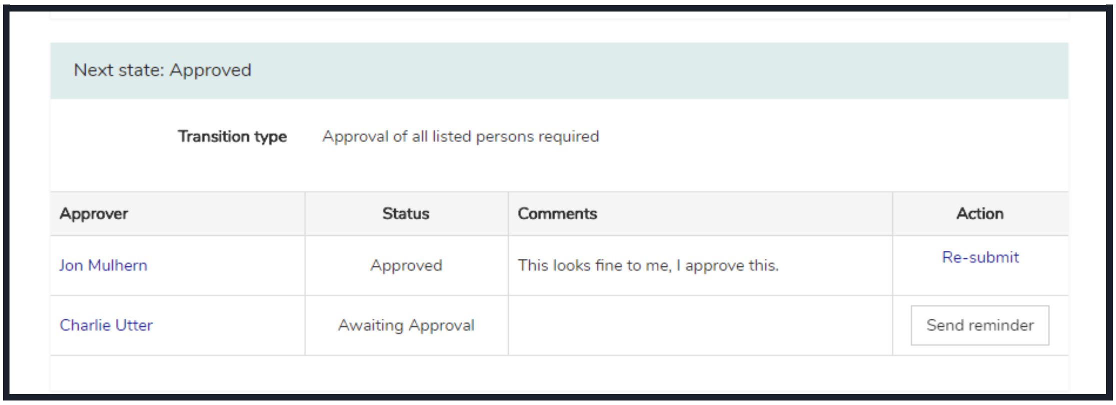
A screenshot of the list of transition types


Transition: Manual

=> Approved

Change State

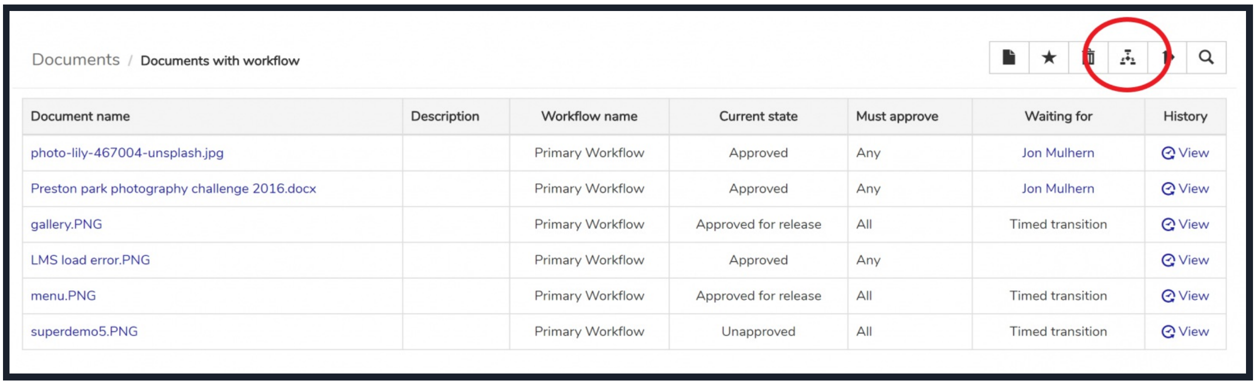
If Manual is the transition type, the approving workflow users will see this on a document.


Next state: Approved

Transition type: Approval of all listed persons required

Approver	Status	Comments	Action
Jon Mulhern	Approved	This looks fine to me, I approve this.	Re-submit
Charlie Utter	Awaiting Approval		Send reminder

If Auto - On All Approve is the chosen transition type, the approving users are shown a table of who has and is yet to approve.


Documents / Documents with workflow

Document name	Description	Workflow name	Current state	Must approve	Waiting for	History
photo-lily-467004-unsplash.jpg		Primary Workflow	Approved	Any	Jon Mulhern	View
Preston park photography challenge 2016.docx		Primary Workflow	Approved	Any	Jon Mulhern	View
gallery.PNG		Primary Workflow	Approved for release	All	Timed transition	View
LMS load error.PNG		Primary Workflow	Approved	Any		View
menu.PNG		Primary Workflow	Approved for release	All	Timed transition	View
superdemo5.PNG		Primary Workflow	Unapproved	All	Timed transition	View

Within the front end of the Documents application, users can click the button highlighted here to see all documents that are currently in the middle of a Workflow process.

Last modified on 30 November 2023 by Hannah Door

Created on 5 June 2018 by Jon Mulhern
Tags: documents, workflow, automation, approvals