

## 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.

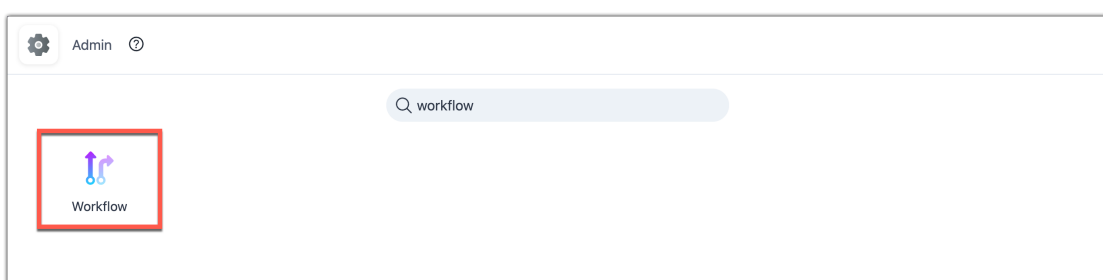
### Example Workflow 1: Group approval

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 categoryDocuments with workflow

 Admin > Workflow Panel > Add/Edit Category

NameSupport

Description

Permissions


Start typing to add...BrowseRemove

Group: Support Managers  
Role: Administrators

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

Add/UpdateDelete

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

Description

Permissions

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

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


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?
11:33

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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 --

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.

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: Heads of Department  
Group: Support Managers  
Role: Administrators
- ☒ View Workflow Details
- ☒ Workflow managers
- [View effective permissions...](#)

Add/Update Delete

Unapproved		Action: None	
Approved		Action: None	

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  
Pick a colour

☒ 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: On All Approve

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

Action None

Transition

Next state Approved

Transition type On All Approve

Save transitions

Add/Update Delete

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?

11:55

11

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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

Root

Discussions

Document Library

Drop Zone

Support and Maintenance Documents

				15-08-2016 15:04	
			Claromentis Administrator	12-06-2025 12:40	
			Michael Christian	10-07-2025 11:11	Document Drop Zone to share with everyone using uploader compo...
			Claromentis 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'.

Admin > Documents > Documents list > Edit folder properties

Edit folder properties

Parent folder

Root

Name

Support and Maintenance Documents

Workflow

All 3 heads to approve :: Claromentis Administrator

Document is searchable

On

Display documents in "What's New" list

On

Owner

Claromentis Administrator

Browse

Description

Update Folder Properties

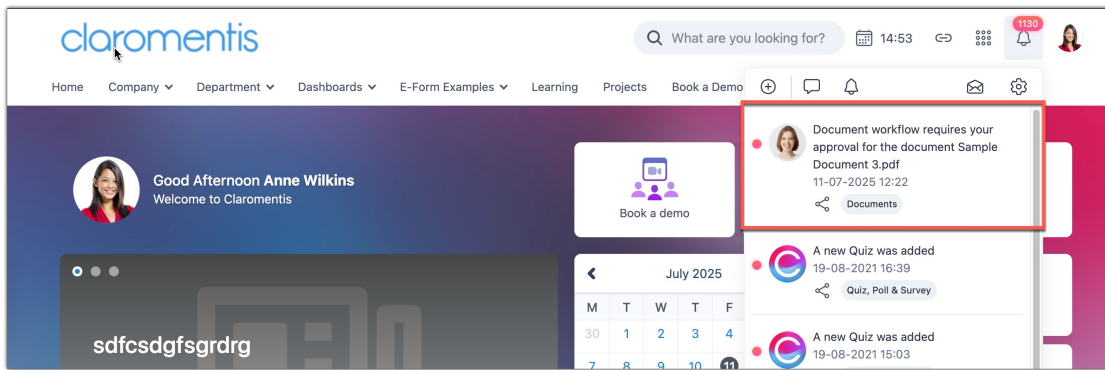
Edit Permissions

Delete

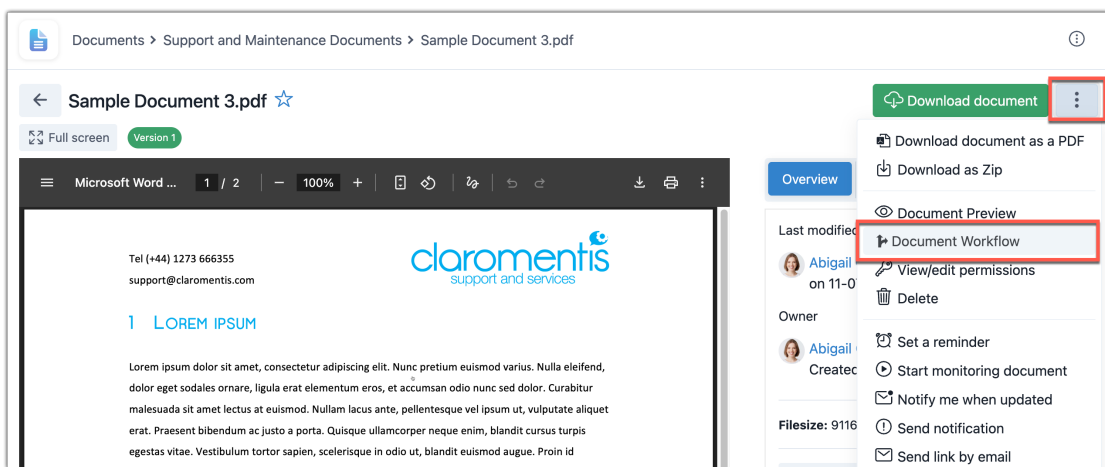
Close folder

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.



- 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.

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

Sample Document 3.pdf

Download document

Full screen

Version 1

Workflow name : All 3 heads to approve

Unapproved

Approved

Action: None

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		Send reminder
Anne Wilkins	Awaiting Approval		
Abigail Clark	Awaiting Approval		Send reminder

Approved with comments

Submit

History

Overview

Comments 0

Last modified

Abigail Clark

on 11-07-2025 12:22

Owner

Abigail Clark

Created on 11-07-2025 12:22

Verify this document

- 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