

Set Up An Approval Process In News

An approval process can be set up in News Channels to ensure that some users can only create draft articles that will only be made live once approved by others.

This is done by differentiating the permissions available so some users can only create drafts, and others can publish or approve.

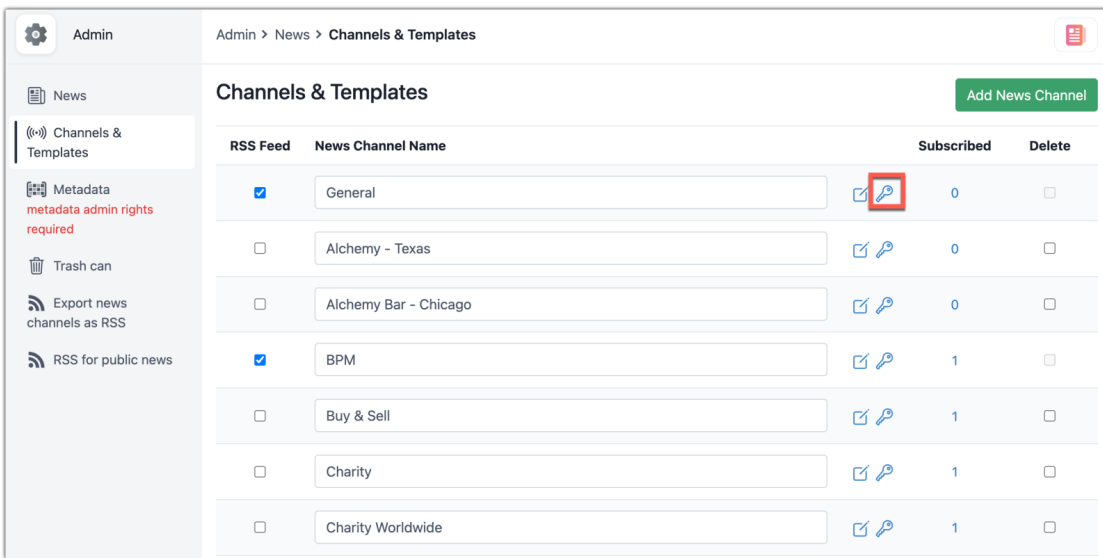
This is an optional feature, as it's fine to just split out permissions between those who can view news vs those who can add and edit all articles.

Setting up an approval process in a channel

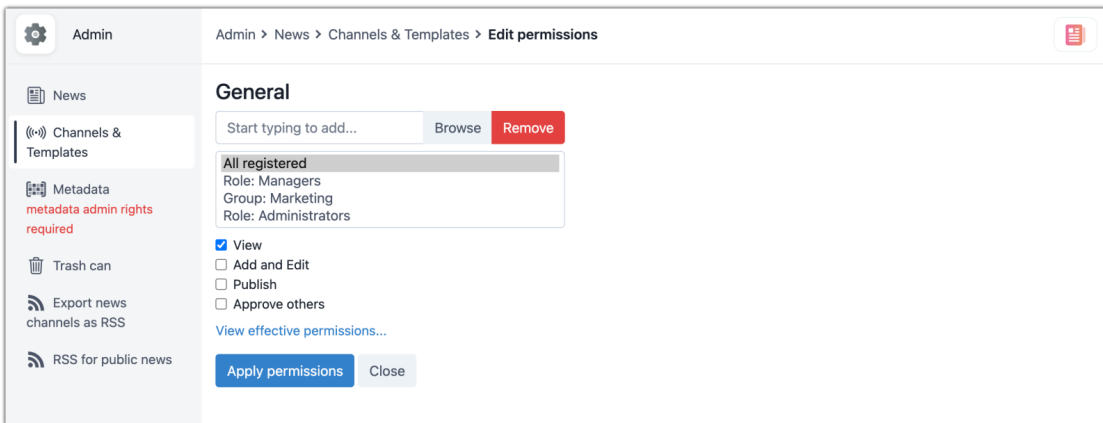
1. Head to Admin > News > Channel & Templates

A screenshot of the Admin > News > Channel & Templates interface. The left sidebar shows the navigation menu with 'Channels & Templates' highlighted. The main content area shows a list of news items with columns for Title, Date, Language, News channel, Status, and Creator. The first three items are 'Covid resurgence Rumours Wiped us in May', 'Record Month here in Chicago!', and 'Small Incident', all with a status of 'News approved'. The fourth item is 'Claromentis Test' with a status of 'Draft'.

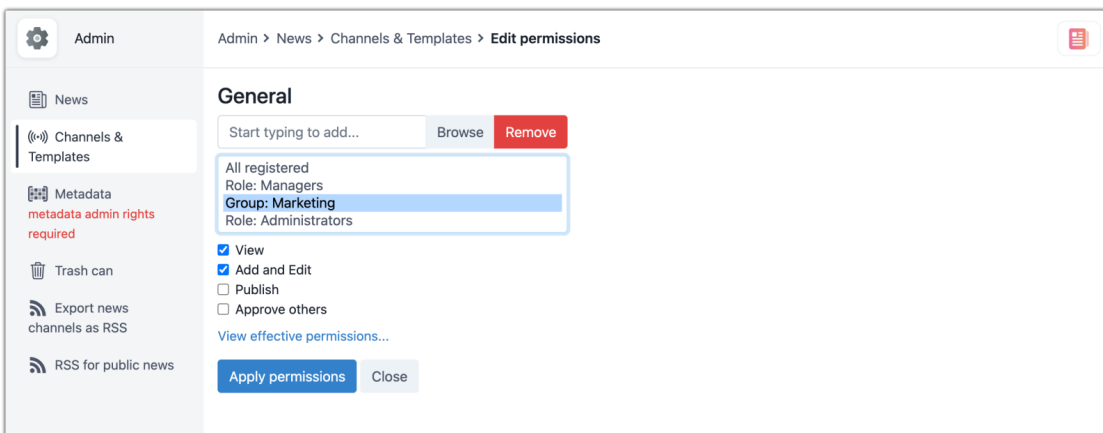
2. Click the key symbol in line with the channel you want to set up the approval process in, to open its permissions.



3. Enter your chosen users/roles/groups and apply permissions across them to configure an approval process. Information on how to split out the permissions is below.



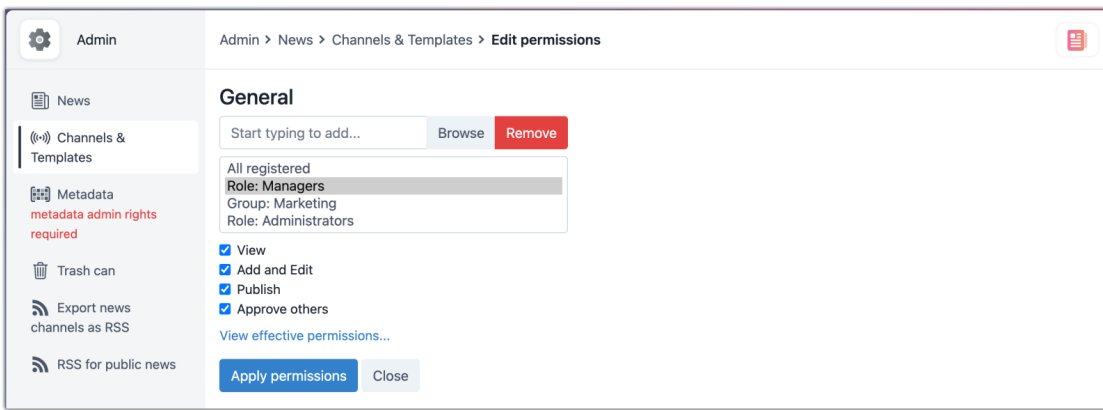
- Ensure some users can only create draft articles for approval in the channel



Only give these users/roles/groups the 'view' and 'Add & edit' permissions.

In this case, those in the Marketing group can only create drafts for approval in this channel.

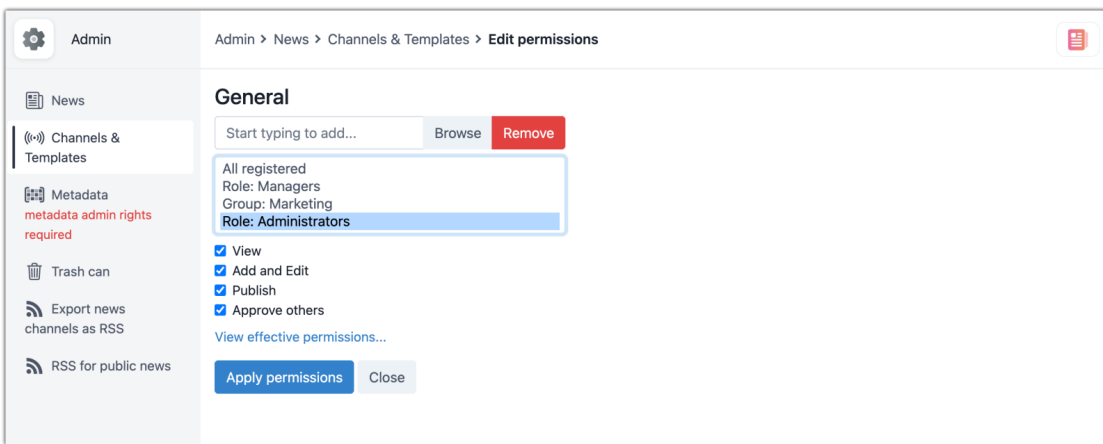
- Ensure some users can approve the drafts that others submit as drafts



Give any users/roles/groups all permissions, crucially the 'approve' others permission.

In this example, users in the 'Manager' or 'Administrator' roles can approve drafts.

- Ensure some users can freely publish their own articles in the channel



Generally, there will be users/roles/groups that are not part of the approval process, and we want to publish their articles outright as they are trusted.

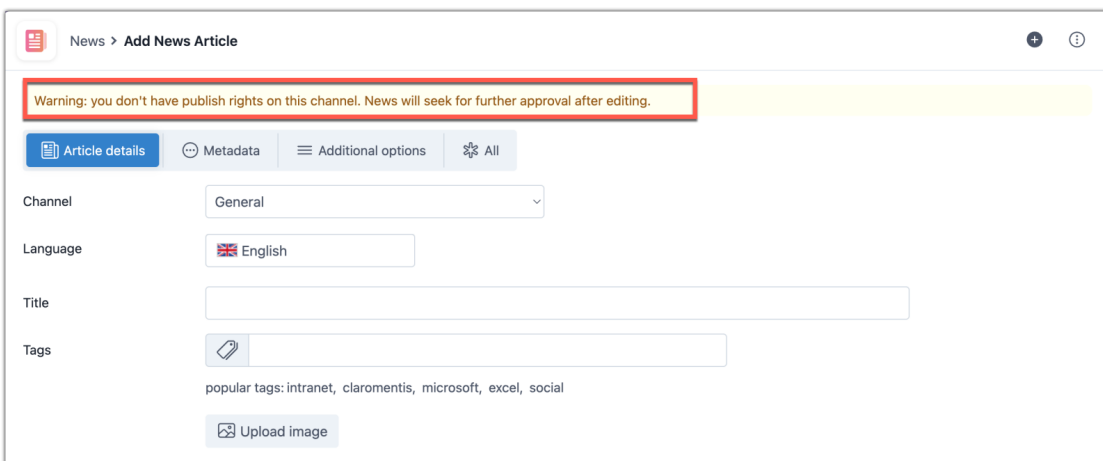
In these cases, give users/roles/groups the first 3 permissions of 'View', 'Add & Edit' and 'Publish'.

Also give them 'approve others' if appropriate, but this is separate from their own articles, which they are allowed to make live through the 'public' permission.

In this example, users in the 'Manager' and 'Administrator' Roles can publish their own articles without approval.

Submitting news for approval

1. A user with only 'View' and 'Add & Edit' permissions will see this notice when creating a new article in the channel:



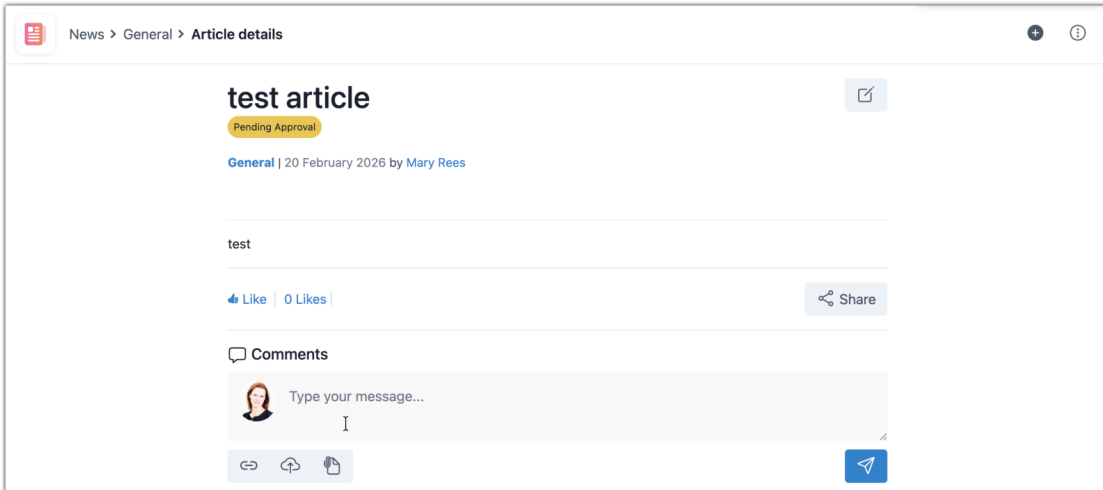
2. The submission will automatically save as a draft article when they click 'submit News' and be labelled as Pending Approval.

Link

For external Links include the whole path. E.g. <https://www.claromentis.com>. For internal links use a relative path E.g. [./intranet/gallery/](/intranet/gallery/)

Comments Enable Disable

Please note: Any user with the ability to create a news article will still be able to save a personal draft (save as draft button shown above) and will be the only account with access to the article. This personal draft is separate from the draft a user with only 'View' and 'Add/Edit' rights submits to others for approval. Users with 'Approve others' rights can access these submissions, but not personal drafts.

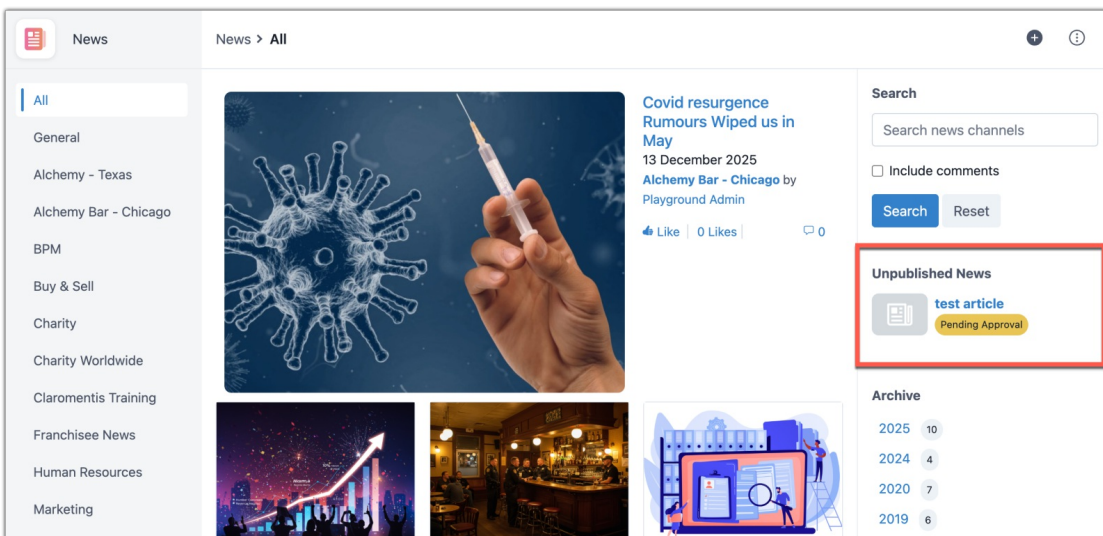


3. Drafts sent for approval will appear listed on the front end of News to all users with 'approve others' rights. (They will also appear to administrators on the admin side of the application)

Those with 'approve others' permissions will be notified when a draft article is submitted for approval.

Reminder: Notification will be generated according to personal notification preference settings.

For more information on notification methods, check out our guide on [Notification preferences](#).



4. Once reviewed, approvers can further edit the article or simply make it live by clicking 'submit'.

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