

Setting up an Approval Process in Blog

Permissions are given through [Blog channels](#) and using a certain structure will allow an approval process to be created.

This is an optional feature that can be used when appropriate for your Blog content, and usually, this is for Community type Blogs.

Test setting up an approval process on a channel with a few administrators to see how this works before adding in more users.

Example Blog

I want to create a community blog about travel that any user can contribute to, but I want their posts to be checked by an administrator/responsible user before it is made live.

This can be achieved by setting up an approval process on the Blog using permissions.

Ahead of time, I have considered who can do what and how this translates with Intranet roles/groups users are in so that this is simple to set up in the system.

'All registered' - Can see the channel, create posts but only submit these for approval

'Leadership Team' Group - Can see the channel, create posts and publish these themselves. I want them to review posts submitted for approval and edit/approve/reject these.

'Content Creators' Role - same as the 'Leadership team'.

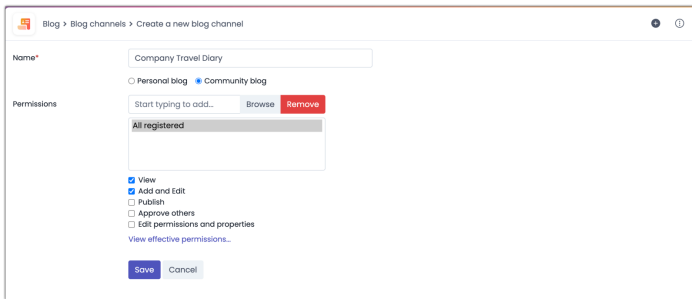
'Intranet administrator' Role - Can do everything so that they can assist in an emergency be it creating a post, making edits or approving/rejecting a submission.

Setting up an Approval Process

For my example Blog, I have started to create the channel from Applications > Blog > Channels > Add New

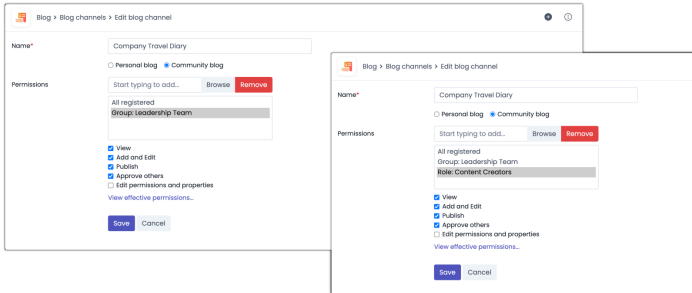
A screenshot of a web application interface for creating a new blog channel. The title bar shows the breadcrumb path: 'Blog > Blog channels > Create a new blog channel'. The form has a 'Name*' field with the text 'Company Travel Diary'. Below this, there are two radio buttons: 'Personal blog' (unselected) and 'Community blog' (selected). Under the 'Permissions' section, there is a search box with the text 'Start typing to add...' and buttons for 'Browse' and 'Remove'. Below the search box is a list of permissions with checkboxes: 'View', 'Add and Edit', 'Publish', 'Approve others', and 'Edit permissions and properties'. A link 'View effective permissions...' is also present. At the bottom of the form are 'Save' and 'Cancel' buttons.

I have entered 'All registered' with the permissions to 'View' and 'Add & Edit':



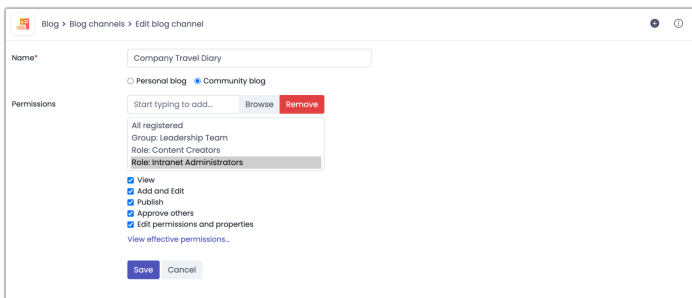
This means any user on my site can see the Blog and can create a post BUT they cannot publish this, instead, they will only be able to submit them for approval.

Next, I have added the 'Leadership Team' group and the 'Content Creator' Role with the same permissions as they are fulfilling the same purpose.



They will be able to create and publish their own articles, but crucially they will have the ability to approve the posts users who cannot publish submit for approval.

Lastly, the 'Intranet administrator' role has been given all rights so that they can additionally edit the channel properties and make changes to permissions over time.

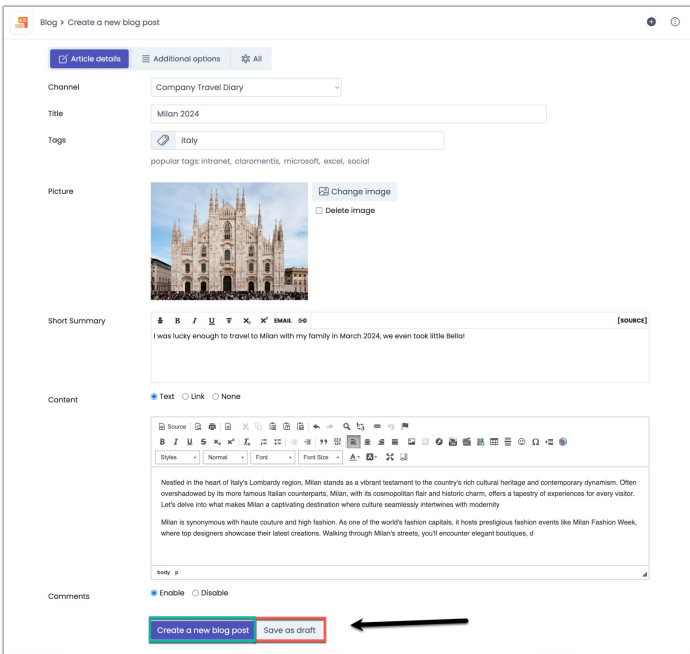


The approval process for this Blog channel has now been set up and users can being to create posts.

How this works in real time

- As a user who can Publish

1. **Save a post as a personal draft** (only they can access this to make further edits and then choose to publish it)
2. Publish the post and make it live (by clicking '**create new blog post**')



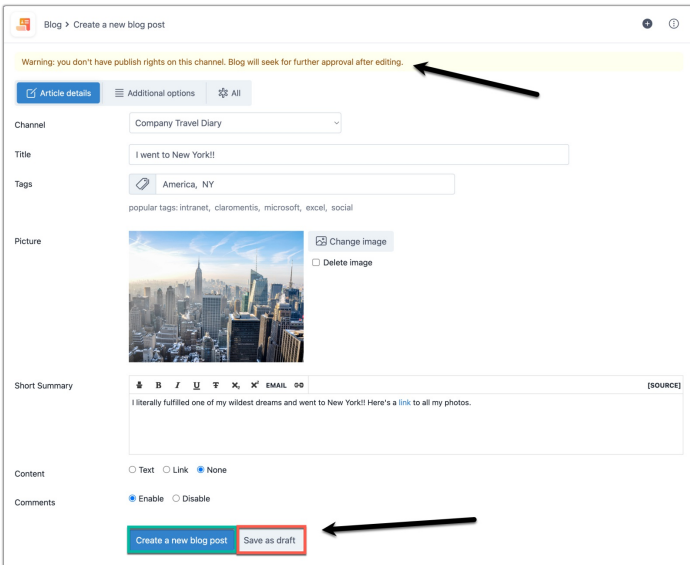
- As a user who can only submit for approval

A reminder is displayed to the user describing they cannot publish a post and once saved theirs will be submitted for approval

1. **Save as a personal draft** (only they can access this to make further edits and then choose to submit for approval)
2. Submit the post for approval by clicking 'create new Blog post' (Any user with 'approve others' permissions can access their article and edit it)

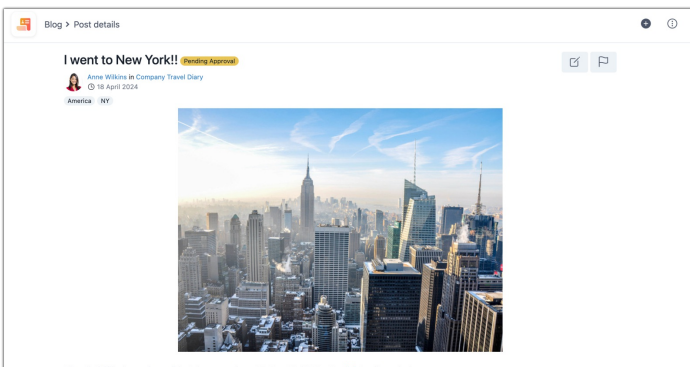
After submitting for approval, the creator can continue to make edits and submit for approval again.

The post will only appear to approvers when in the submitted save state (and not draft)



- As a user who can 'approve others'

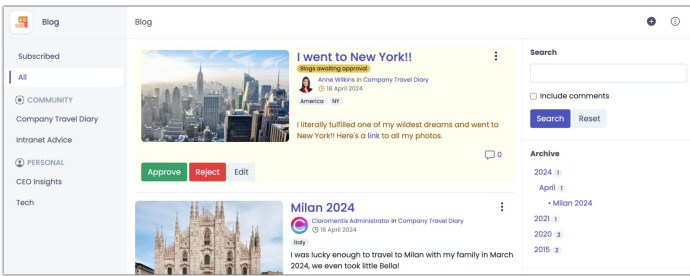
Once a post is submitted for approval it will be labelled as such, and can only be accessed by the original author and those with 'approve others' rights.



All users with 'approve others' rights will be notified when a user submits.

The post will also be listed in the Blog area and is only visible to those with approve rights.

Any user with 'approve others' rights can approve or reject the article using the buttons on screen, or they can opt to edit the post first.



Approve: The post is published and users can see it on the front end

Reject: The author will be notified their post was rejected and the label will update. Only the author can access the post at this point and they have the option to edit the post and send for approval again or to delete it.

Edit: The only options for the approver here are to submit (publish the article) or delete it.

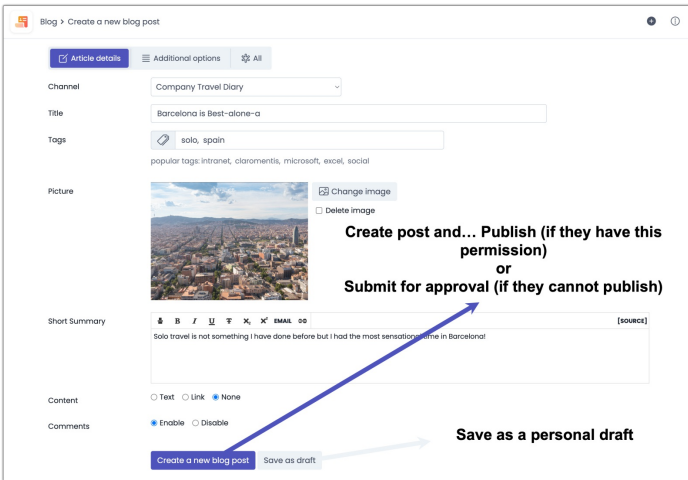
Personal Drafts

It is important to note the distinction between submitting a post for approval and saving a personal draft when an approval process has been configured.

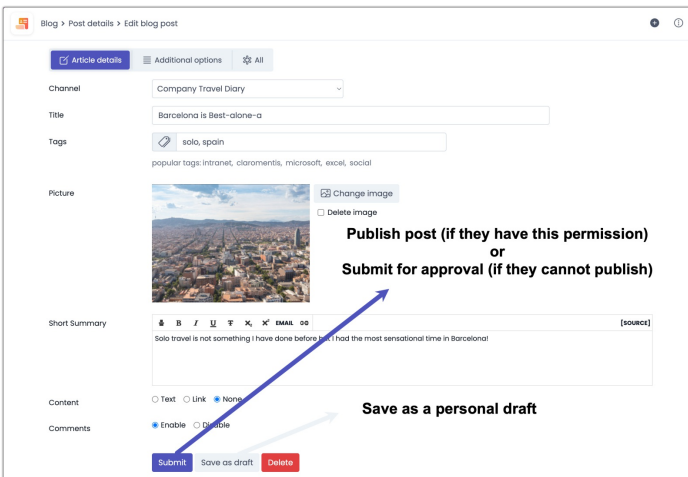
Every user with 'add & edit' permissions can create a post in a channel and will have the option to save this as a personal draft.

Even if they cannot publish the article outright and have to submit these for approval, personal drafts are separate from this and still available to them.

When creating a new article:



When editing a personal draft:



This is only accessible to the user and they can return to it to make as many edits as they like.

So, even if they cannot publish their own posts, they can always save it as a personal draft which is only for them to access.

Only when the user decides to submit the post for approval (using the 'create new post' button) will users with 'approve others' permission be able to see/access it.

Created on 18 April 2024 by [Hannah Door](#). Last modified on 23 May 2024

Tags: [approval](#), [blog](#), [permissions](#), [v9](#)