

## Control Content Approval and Publishing on a Library with Approval Workflow

Hello, this is Asif Rehmani from SharePoint-eLearning.com. Document libraries in SharePoint come with a built-in Content Approval feature, the concept here being that if it is turned on, the content that is being created or uploaded through the library needs to be approved before it appears publically in the library. This feature works fine, however, approving or rejecting the document is a manual one step process by whoever happens to be the owner of the library. What if you wanted to put the document through a true approval Workflow process and have the content automatically being marked approved if the Workflow completes successfully. How would you do that? Well, this is exactly what I will be showing you in this video. So, let us get started.

Okay so first of all, I am at a site with a Marketing Team and currently Ben Burton is the one that has signed in. Ben Burton happens to be the owner of the site. I am going to go to Shared Documents and in Shared Documents → I am going to go to Settings → then Document Library Settings, what I want to do is go to Versioning Settings and then set up Content Approval here and also set up the Versioning to be turned on. So, 'Major and minor versioning' is the one that I am turning on. Also I want to say that 'Only users who can edit items' in this library should be able to see the items, which would be members or above.

Now I will go back to the Document Library → Shared Documents and see that there is a new column that has been created called Approval Status. Okay, so going back to Settings → Document Library Settings, I am going to set up a Workflow now that should control the Approval Status. I am going to base this Workflow upon the Approval Workflow template and call this Workflow Marketing Docs Approval. The Tasks list is going to be the default Task list, so is the History list and I am going to set it so whenever a new item is created in the library, uploaded or created, that is when the Workflow starts. When I click on Next, I could see that I can have this Workflow be Parallel or Serial, I am going to have it to be Serial Workflow and then set up Approvers for this Workflow. So, it is going to be two Approvers, Jose and Patricia. And there is a message I am going to type in there and that is going to be 'Please verify the accuracy of this document', so this message will go to them, Jose and Patricia, as the Task item. Each of them is going to get two

days to complete their part of the Workflow. If they have not done so, they will get a warning E-mail and also I am going to say that 'Update the approval status for the content approval to be approved' once this Workflow is successfully completed.

Once my workflow is ready for Marketing Docs approval, I will go back to Shared Documents Document Library, okay, so now I am going go ahead and Upload a document, okay so the Communications plan under Marketing Docs folder, I mark this as content type of Document because that is what the content type is for this, also when I change or actually update the title to the name of the file, so I copy that, press OK.

Alright so my document is there now and is in the 'Approval status' of draft and also a workflow has been started for Marketing Docs approval. So at this point in time, something to note is that if I go to the Version History of this document, it is showing up as 0.1, so it is in Draft Mode and also the Version History is 0.1 at this point in time.

If I sign in as a different user who happens to be a member of the site, like Alan, the document is still there. And if I sign up as another person like Connie who happens to be a reader of this library, now Connie cannot see this document because it has not been approved yet. So, let me log back in as Ben who happens to be owner of this library and this site as well, go to the In Progress status of the Workflow and now I can see that there is a task assigned to Jose, which says 'Please approve Communication Plan', Communication Plan being the actual title of the document.

So I am going to go back to the Site → Home Page, from there I will go to the Tasks list and here I can see that there is the Task assigned to Jose. When I am signed in as Jose, okay so now that I am signed in as Jose who happens to be a member of the site, I will go into the task and see that there is a link to the actual Communication Plan document, I will go down to the comments and say 'I Approve' and then Approve this document.

Alright so now that has been approving, next task is being created for Patricia, now before I can go in as Patricia, when signed in, I Marcia: going to go to the task and once again I am going to Approve this task and say 'I like it'. Okay, so everything has been completed now. The workflow should be done and as you can see that the Marketing Docs approval is Approved and also the approval status is Approved.

If you look at the version of this document at this time, going to Version History, it shows up as a published 1.0 version. The content approval functionality that comes packaged with all documents libraries in SharePoint is definitely a useful concept. So in this video you saw how easy it is to create workflow based upon the Approval Workflow Template to control the Content Approval setting in the library. This has been a presentation of [SharePoint-elearning.com](http://SharePoint-elearning.com).