

Use a workflow to manage content approval for a library

You can use a workflow to manage content approval (also called moderation) in libraries for which content approval is required and major and minor versioning is enabled. When you use workflow to manage the content approval process, minor versions of a document remain in a pending state until they are approved or rejected through the workflow process. If a minor version is approved through a workflow, its status is updated from **Pending** to **Approved**, and it is published as a major version and displayed to anyone with permission to view the library. If a minor version is rejected through a workflow, its status is updated from **Pending** to **Rejected** and it remains a minor version that is visible only to people who have permission to view minor versions in the library. A content approval workflow starts automatically when authors check in a minor version as a major version, or when they select the **Publish a Major Version** command for a document. You can also choose to allow users with specific permissions to start the content approval workflow manually.

Find links to more information about both content approval and versioning in the **See Also** section.

The following sections explain the steps that are involved in setting up a workflow to manage content approval for a library.

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Step 1: Enable content approval and specify draft item security for the library

When you set up a library, you can require approval for changes to the documents that are saved in that library.


When content approval is required for a library, a document that was changed remains in a pending state

until it is approved or rejected by someone who has permission to approve it. If the file is approved, it is assigned an **Approved** status in the library, and it is displayed to anyone with permission to view the library. If the file is rejected, its status is updated to **Rejected** and it remains visible only to the document author and to people with permission to manage lists.

By default, a pending document is visible only to its author and to the people with permission to manage lists, but you can specify whether other groups of users can view the document.

1. If the library is not already open, click its name on the Quick Launch.

If the name of your library does not appear, click **View All Site Content**, and then click the name of your library.

2. On the **Settings** menu , click the settings for the type of library that you are opening.

For example, in a document library, click **Document Library Settings**.

3. Under **General Settings**, click **Versioning settings**.
4. In the **Content Approval** section, under **Require content approval for submitted items?**, click **Yes**.
5. In the **Draft Item Security** section, under **Who should see draft items in this document library?**, select **Only users who can approve items (and the author of the item)**.

Note If you have not previously updated the versioning settings for the library, this option is selected automatically when you choose to require content approval.

6. Click **OK**.

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Step 2: Enable major and minor versioning for the library

You must also enable major and minor versioning for the library before you can use a workflow to manage content approval.

1. If the library is not already open, click its name on the Quick Launch.

If the name of your library does not appear, click **View All Site Content**, and then click the name of your library.

2. On the **Settings** menu , click the settings for the type of library that you are opening.

For example, in a document library, click **Document Library Settings**.

3. Under **General Settings**, click **Versioning settings**.
4. In the **Document Version History** section, click **Create major and minor (draft) versions**.
5. Click **OK**.


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Step 3: Set up a workflow to manage content approval for a library

The predefined Approval workflow that is available in Microsoft Office SharePoint Server 2007 can be used to manage content approval for a library. Your organization can also develop and deploy custom a custom workflow to manage content approval.

When you use a workflow to manage content approval in a library, the content approval workflow starts whenever users check in a document as a major version, or when they select the **Publish a Major Version** command for a document. While the workflow is in progress, the document remains a minor version with a status of **Pending**. If the document is approved through the content approval workflow, its status is updated to **Approved**, and the document is published as a major version, which makes it visible to anyone with permission to view documents in the library. If the document is rejected through the content approval workflow, its status is updated to **Rejected**, and it remains a minor version that is visible only to the document author and to those users who have permission to manage lists.

Note There can be only one designated content approval workflow for a library that starts automatically when authors check in documents as major versions, or when they select the **Publish a Major Version** command for a document.

1. Open the library to which you want to add a workflow.
2. On the **Settings** menu , click the settings for the type of library that you are opening.

For example, in a document library, click **Document Library Settings**.

3. Under **Permissions and Management**, click **Workflow settings**.

Notes

- The **Workflow settings** command appears only if workflows are activated for the site

collection.

- If workflows have already been added to this library, this step takes you directly to the **Change Workflow Settings** page, and you need to click **Add a workflow** to go to the **Add a Workflow** page. If no workflows have been added to this list, library, or content type, this step takes you directly to the **Add a Workflow** page.
4. On the **Add a Workflow** page, in the **Workflow** section, click the name of the workflow template that you want to use to manage content approval.

If you plan to use the predefined **Approval** workflow that is available in Office SharePoint Server 2007, click the **Approval** workflow template.

5. In the **Name** section type a unique name for the workflow.
6. In the **Task List** section, specify a tasks list to use with this workflow.

Notes

- You can use the default **Tasks** list or you can create a new one. If you use the default **Tasks** list, workflow participants will be able to find and view their workflow tasks easily by using the **My Tasks** view of the **Tasks** list.
 - If the tasks for this workflow will reveal sensitive or confidential data that you want to keep separate from the general **Tasks** list, you should create a new tasks list.
 - If your organization will have numerous workflows or if workflows will involve numerous tasks, you should create a new tasks list. In this instance, you might want to create tasks lists for each workflow.
7. In the **History List** section, select a history list to use with this workflow. The history list displays all of the events that occur during each instance of the workflow.

Note You can use the default **History** list or you can create a new one. If your organization will have numerous workflows, you might want to create a separate history list for each workflow.

8. In the **Start Options** section, select the **Start this workflow to approve publishing a major version of an item** check box.

Note This option is available only if support for major and minor versioning is enabled for the library and if the workflow template you selected can be used for content approval.

9. If you want to allow the workflow to be started manually, select the **Allow this workflow to be manually started by an authenticated user with Edit Items Permissions** check box. Select the **Require Manage Lists Permissions to start the workflow** check box if you want to require additional permissions to start the workflow.

10. If there are additional customization options available for your workflow, click **Next**, and then specify the options that you want on the Customize page for your workflow.

If you are using the predefined Approval workflow that is available in Office SharePoint Server 2007, see [Use an Approval workflow](#) for details about how to customize your workflow.

11. If there are no additional customization options available for your workflow, click **OK**.

Notes

- The content approval workflow starts automatically when an author checks in a draft as a major version, or when an author chooses the **Publish a Major Version** command for a document.
- People who have permission to approve a document directly can do so by editing the properties for that document directly in the library. If a document is approved or rejected in this way, the workflow automatically ends.

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