

MAYAN EDMS

User Guide

Approvals Module

This guide explains how to submit a document for approval, cast your vote, review your history, and access the management views.

Version 1.1 — October 2026

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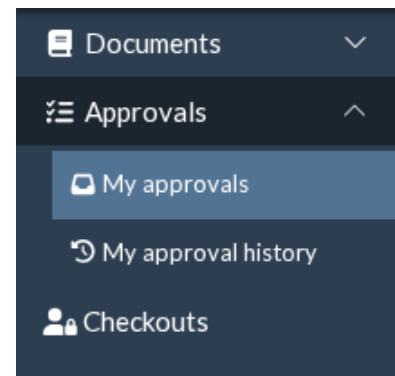
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1 Navigation — the Approvals menu

The Approvals module is accessible from the Mayan EDMS main menu. It groups four entries whose availability depends on your permissions.

Menu entry	Description
My approvals	Your requests awaiting a vote. This is where you approve or reject documents assigned to you.
My approval history	Your past votes, newest first, with the final outcome of each cycle.
All approval requests	Global view of all requests — restricted to managers with the <i>Manage approval requests</i> permission.
Audit report	Cycle-level summary with CSV export — restricted to managers.

If an entry does not appear in your menu, ask your administrator to grant the corresponding permission in **Setup** → **Roles**.



2 Submitting a document for approval

Submitting a document for approval is done through the workflow transition associated with that document. There is no separate "Send for approval" button — the transition itself triggers the process automatically.

1 Open the document

Navigate to the document via **Documents** → **All documents** or from your cabinet list.

2 Access the document workflows

In the **Actions** panel on the right, click **Workflows**. The list of active workflows for this document is displayed.

3 Launch the transition

On the relevant workflow row, open the **Actions**  menu and choose **Transition**.

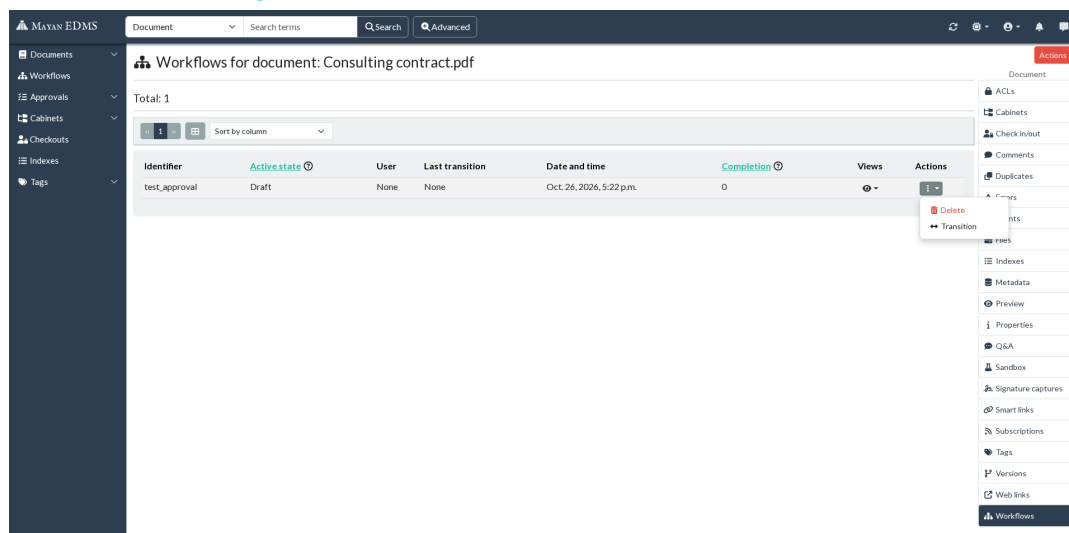
4 Select the transition

In the form, select the appropriate transition — for example *"Send for approval"* — then click **Select**.

5 Confirmation

Approval requests are created automatically and assigned approvers receive an email notification (if configured).

Document Workflows panel



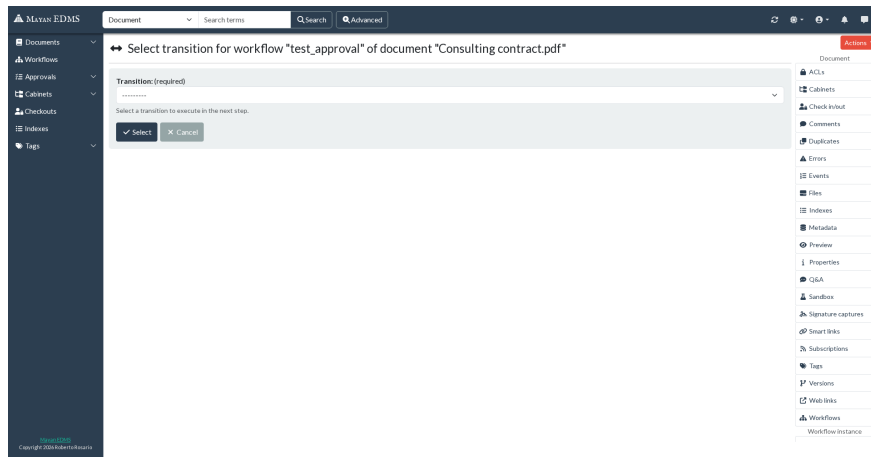
The screenshot displays the 'Workflows for document: Consulting contract.pdf' panel. It features a table with the following data:

Identifier	Active state	User	Last transition	Date and time	Completion	Views	Actions
test_approval	Draft	None	None	Oct. 26, 2026, 5:22 p.m.	0		

The 'Actions' dropdown menu is open, showing options: Delete, Transition, and others.

Workflows panel — active state "Draft" and Transition menu

Selecting the transition



Transition form — selecting "Send for approval"

Note: Once the transition is executed, the document may be locked (checked out) if the administrator has enabled that option, preventing any new file version from being uploaded during the approval cycle.

3 Voting on a request — My approvals

The **My approvals** view lists all your pending approval requests. Each row represents a document on which you need to make a decision.

Document	Transition	Workflow	Submission comment	Deadline	Status	Requested by	Cycle	Actions
Maintenance contract.pdf	Approve	test_approval	Clause 4 updated after legal review	Oct. 31, 2026, 5:22 p.m.	Pending	alex	Current	✓ Approve ✗ Reject 👁 View all votes

My pending approval requests — list with action menu

Column reference

Column	Description
Document	File name — click to open and review the document before voting.
Transition	The transition your vote will trigger or block (e.g. Approve).
Workflow	Identifier of the workflow this transition belongs to.
Submission comment	Comment left by the person who submitted the document.
Deadline	Date and time by which you must vote. Past this point the request expires automatically.
Status	Pending = awaiting your vote.
Requested by	User who triggered the workflow transition.
Cycle	Current = active cycle. Previous cycles exist if the document was submitted more than once.

How to vote

1 Open the action menu

On the document row, click the button (three vertical dots) at the far right of the row.

2 Choose Approve or Reject

Approve: your positive vote is recorded. A comment is optional.

Reject: your negative vote is recorded. A justification comment is required.

3 Automatic outcome

As soon as the quorum is reached (e.g. first approver in ANY mode, all approvers in ALL mode), the transition fires automatically and the document changes state.

Viewing all votes for a request

In the  menu, choose **View all votes** to see details for every approver involved in the request, their individual status, and any comments they left.

MAYAN EDMS

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Vote status — Cleaning services contract.pdf

Workflow: test_approval | Current state: Rejected

Transition: Approve — Cycle 1 — requested by alex

User:lea — Quorum: Any (first approval triggers)

Approver	Status	Comment
lea	Expired	—

User:paul — Quorum: Any (first approval triggers)

Approver	Status	Comment
paul	Rejected	Liability clause missing

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Vote status — quorum "Any (first approval triggers)", Rejected vote with comment

Tip: Before voting, click the document name to review its content. You can return to the list without losing your place using the browser's  **Back** button.

4 Reviewing my vote history

The **My approval history** view shows all your past votes. It lets you look up a previous decision and see whether the corresponding cycle was approved, rejected, or expired.

Document	Transition	Requested by	Requested on	Resolved on	Vote	Cycle	Outcome	Votes
Cleaning services contract.pdf	Approve	alex	2026-10-26 17:22	2026-10-26 17:22	Rejected	Current	Rejected	👁
Supplier framework contract.pdf	Approve	alex	2026-10-26 17:22	2026-10-26 17:22	Approved	Current	Approved	👁

My approval history — filter by vote result and document name

Filtering the history

- **Vote** — filter by your individual vote result: Approved, Rejected, Expired.
- **Document** — partial match on the file name.

Additional columns

Column	Description
Requested on	Date and time when the approval request was created.
Resolved on	Date and time when your vote was cast (or the request expired).
Vote	Your individual decision on this request (coloured badge).
Cycle	Current = active cycle, Previous cycle = from an earlier submission of the same document.
Outcome	Final result of the cycle (not just your vote) — Approved, Rejected, or Expired.
Votes	Eye icon — click to view the full vote breakdown for the cycle.

Important distinction: the **Vote** column shows *your* individual decision. The **Outcome** column shows the *final cycle result*, which may differ from your vote depending on the configured quorum.

5 All approval requests

The **All approval requests** view is restricted to users with the *Manage approval requests* permission. It displays every request across all workflows and all approvers.

Document	Workflow	Transition	Approver	Requested by	Status	Deadline	Resolved	Votes
Cleaning services contract.pdf	test_approval	Approve	paul	alex	Rejected	2026-10-31	2026-10-26	👁
Cleaning services contract.pdf	test_approval	Approve	lea	alex	Expired	2026-10-31	—	👁
Supplier framework contract.pdf	test_approval	Approve	paul	alex	Approved	2026-10-31	2026-10-26	👁
Supplier framework contract.pdf	test_approval	Approve	lea	alex	Approved	2026-10-31	2026-10-26	👁
Maintenance contract.pdf	test_approval	Approve	paul	alex	Pending	2026-10-31	—	👁
Maintenance contract.pdf	test_approval	Approve	lea	alex	Pending	2026-10-31	—	👁

All approval requests — Status and Document filters (here: document "contract")

Available filters

- **Status** — filter by status: Pending, Approved, Rejected, Expired.
- **Document** — partial match on the file name.

Columns specific to this view

Column	Description
Approver	The user assigned as approver for this specific request.
Requested by	The user who triggered the workflow transition.
Status	Status of the individual request (per approver).
Deadline	Configured deadline for this cycle.
Resolved	Date on which the request was resolved (vote cast or expired).
Votes	Eye icon — view the full vote breakdown for the cycle.

6 Audit report

The **Audit report** provides a summary view per approval *cycle* (rather than per individual request). Each row represents one complete cycle with a full vote breakdown. It is restricted to managers.

Document	Workflow	Transition	Cycle	Requested by	Total	✓ (green)	✗ (red)	■ (orange)	... (grey)	Outcome	Started	Resolved
Cleaning services contract.pdf	test_approval	Approve	1	Alex Morgan	2	0	1	1	0	Rejected	2026-10-26	2026-10-26
Supplier framework contract.pdf	test_approval	Approve	1	Alex Morgan	2	2	0	0	0	Approved	2026-10-26	2026-10-26
Maintenance contract.pdf	test_approval	Approve	1	Alex Morgan	2	0	0	0	2	Pending	2026-10-26	—

Approval audit report — one row per cycle, date/document/outcome filters and CSV export

Report filters

- **From / To** — date range (cycle start date).
- **Document** — partial match on the file name.
- **Outcome** — filter by final result: Approved, Rejected, Expired, Pending.

Report columns

Column	Description
Document	Name of the file involved in the cycle.
Workflow / Transition	Workflow and transition the cycle relates to.
Cycle	Cycle number for this document (increments with each new submission).
Requested by	User who triggered the cycle.
Total	Total number of approvers involved in this cycle.
✓ (green)	Number of Approved votes.
✗ (red)	Number of Rejected votes.
■ (orange)	Number of Expired requests (deadline passed without a vote).
... (grey)	Number of requests still Pending.
Outcome	Final cycle result: Approved, Rejected, Expired, or Pending.
Started / Resolved	Cycle start and close dates.

CSV Export

The **Export CSV** button at the top right downloads a CSV file applying the same filters as the current view. The file is UTF-8 encoded with a BOM for optimal compatibility with Microsoft Excel on Windows.

Tip: Apply your filters *before* clicking Export CSV — the export respects exactly the active filter criteria.

7 Quick reference — Statuses

Individual request statuses

Status	Meaning
Pending	The request is active and awaiting this approver's vote.
Approved	The approver has voted positively.
Rejected	The approver has voted negatively (a comment is mandatory).
Expired	The deadline passed without this approver casting a vote.

Cycle final result (Outcome column)

Status	Meaning
Approved	The approval quorum was reached — the transition fired.
Rejected	A rejection vote was recorded according to the quorum rules.
Expired	The cycle deadline passed without reaching quorum.
Pending	The cycle is still active — at least one approver has not yet voted.

Quorum modes

Mode	Trigger rule
ANY	The first positive vote immediately triggers the transition.
ALL	Every approver must vote positively.
FRACTION	A minimum number of approvals (configured by the administrator) is required.

For questions about workflow configuration, approver assignments, or permissions, refer to the **Approvals Administrator Guide** or contact your Mayan EDMS administrator.