

CONFIGURING COMPLIANCE – WORKFLOW

CONFIDENTIAL

STATUS AND ACTIONS

Workflow is a collection of steps to move content to different states based on available actions

Status: refers to the state of a document

Action: refers to a movement of a document in the workflow

Status = state

Noun

**Action = movement
or change**

Verb

Each step in the workflow is related to a state

Steps are associated with delivery of content via publishing, via scripts, via social networks

These are the steps in the Basic Workflow, configured in all CMS instances.

“Basic Workflow”

Draft

Rejected

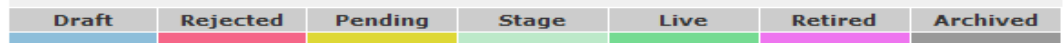
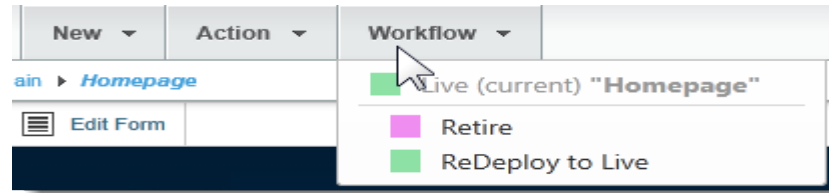
Pending

Stage

Live

Retired

Archived



Workflows can also be customized to include as many or as few steps as needed.

Draft

The initial state of a document in the CMS

“Everyone” has access

Pending

A review step: restricted to editor or higher level users

Content is “Approved” – and published to Stage or Rejected.

Rejected

A temporary step – identifies the content as having been Rejected

Content returns to the Draft step after being edited to restart the process

Stage

Content is published to the Staging server to be viewed outside the CMS and in the full context of the site

Content can be republished if changes are needed, published directly to Live, or scheduled for later publishing

Live

The ultimate goal of all content: it's now on the Live site

Content can be republished to Live – usually by admins only, retired, or scheduled for retirement.

Branching would start – and complete – at this step.

Retired

Content is removed from all published locations: Live and Stage sites

Content is still visible in the general file/folder view of the CMS.

Admins can Archive the content, and a timeout transition is set up to automatically Archive the content as well.

Archive

The “CMS Housekeeping” step – content is still in the CMS, but out of the main file/folder view.

Content can be seen via the “Hidden Folder”, and revived to Draft by admins if needed.

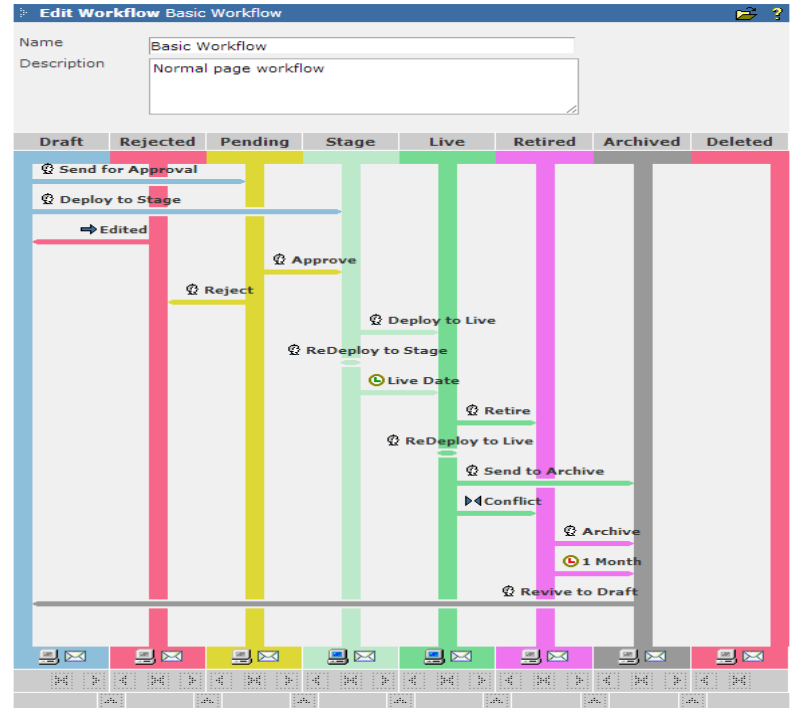
Steps

Routes/Commands

Step ordering/ insert/delete

Email

Publishing



Steps

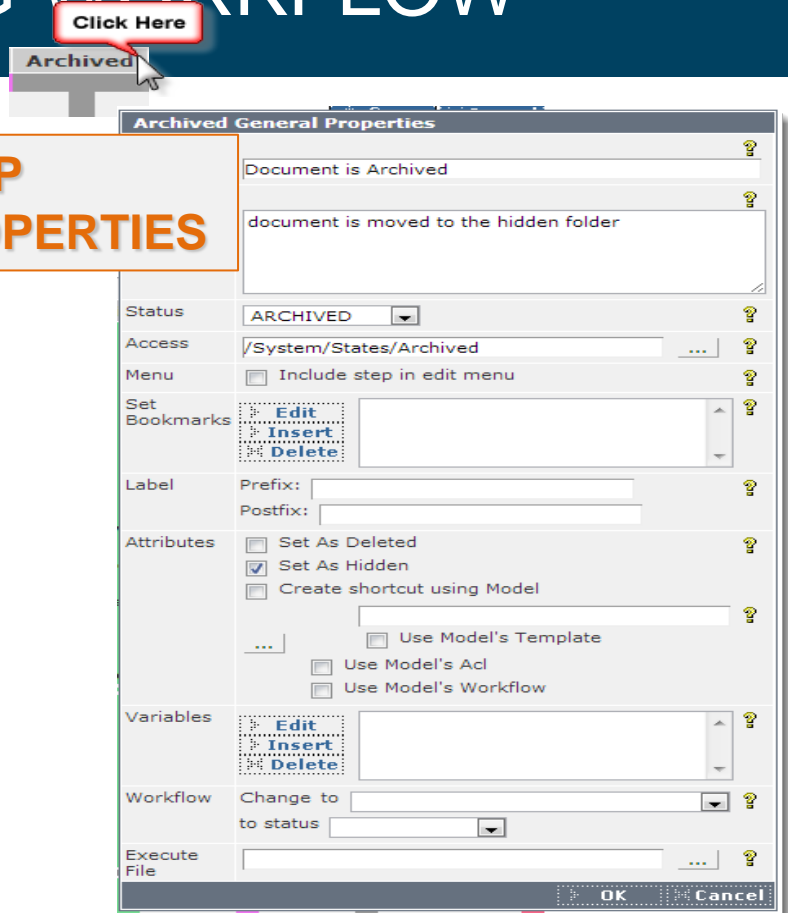
Routes/Commands

Step ordering/ insert/delete

Email

Publishing

**STEP
PROPERTIES**



Steps

Routes/Commands

Step ordering/ insert/delete

Email

Publishing

ROUTE SELECTION

Retired Archived Deleted

Route Selection

Command | Insert a User Prompted Transition. The user sees this command in their Edit menu.

Action | Insert an Action Transition. When a user performs a certain action the workflow automatically performs the transition.

Schedule | Insert a Scheduled Transition. When the specified schedule date occurs this transition is executed.

Timeouts | Insert a Timeout Transition. Note that only **one** timeout transition is permitted. When an asset has been in this workflow step for the specified timeout period this transition is executed.

Periodic | Insert a Periodic Transition. At the specified periodic time the transition is executed.

Conflict | Insert a Conflict Transition. Note that only **one** conflict transition is permitted. When more than one asset enters a workflow step move one of the documents to another step.

Click Here

Cancel

Revive to Draft

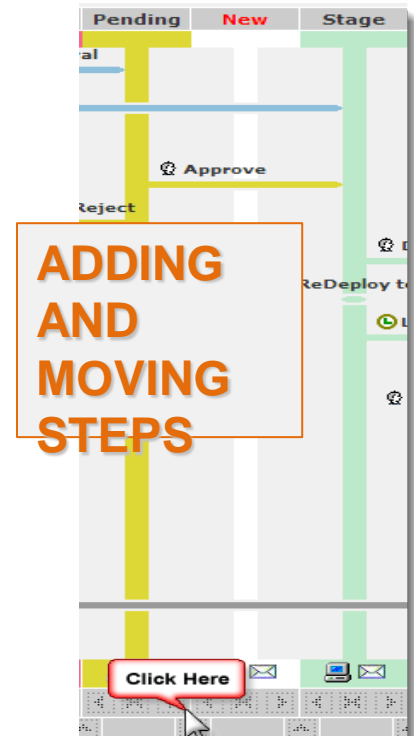
Steps

Routes/Commands

Step ordering/ insert/delete

Email

Publishing



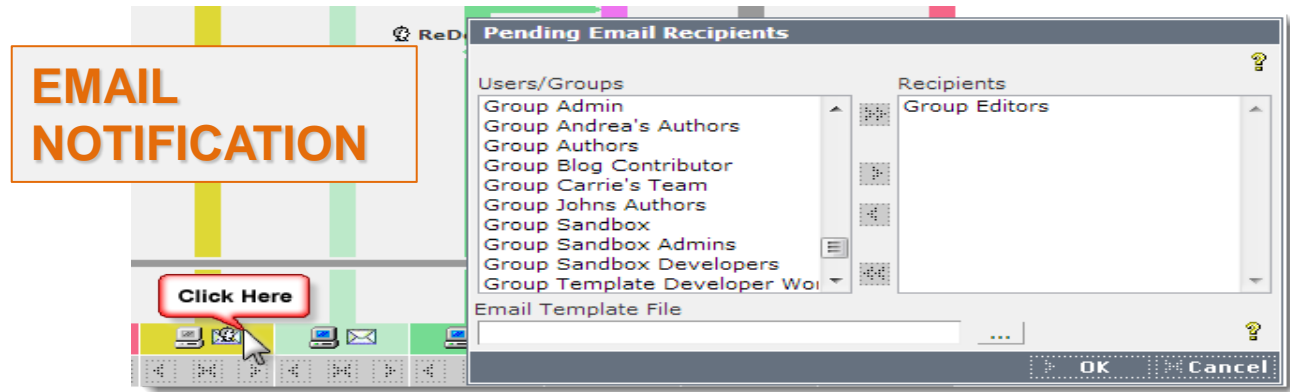
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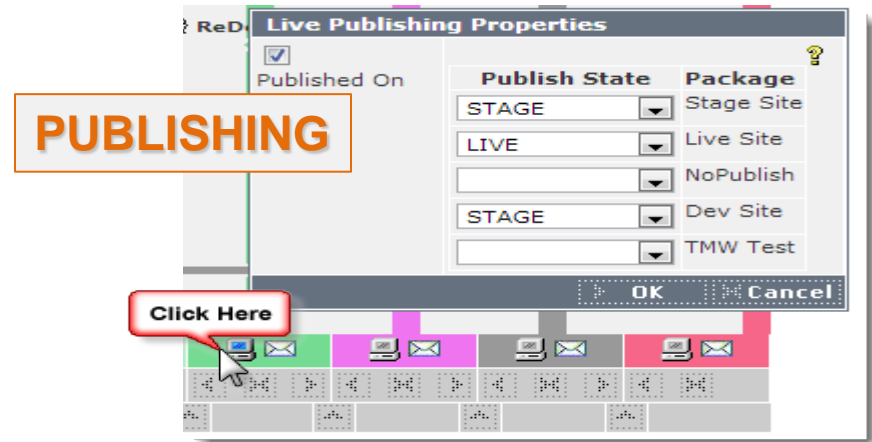
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WORKFLOW FILTERS

Currently only configurable from Classic UI, this allows for simple to complex approval processes

Cannot delete if Workflow Filter is in use

Query-builder interface allows for robust logic

Recommendation: use very few and keep them simple

The image shows two screenshots from a software interface. The top screenshot is titled 'Edit Workflow Filter - UUA About Us Editor Approval'. It contains a 'Name' field with the text 'UUA About Us Editor Approval' and a 'Description' field which is empty. The bottom screenshot is titled 'Workflow Filter Query'. It includes a text block explaining filter criteria: 'Filter Criteria - Specify field comparisons that if true would show the command and execute the command when eventually becoming false. The command will only appear for people who can change the results of this filter. For example, users outside the groups listed in this query will not see the command since they can't change the value.' Below this is a table with four columns: 'Search Fields', 'Comparison', 'Value', and 'Boolean Join'. The first row shows 'sectionname' selected in the 'Search Fields' dropdown, 'equals' in the 'Comparison' dropdown, '1' in the 'Value' field, and 'AND' in the 'Boolean Join' dropdown. The second row shows '[Group UUA About Us' selected in the 'Search Fields' dropdown, 'less than' in the 'Comparison' dropdown, '1' in the 'Value' field, and '-- select join' in the 'Boolean Join' dropdown.

Search Fields	Comparison	Value	Boolean Join
sectionname	equals	1	AND
[Group UUA About Us	less than	1	-- select join

All files and folders have a Workflow property

Properties > Workflow

Can apply individually or en masse

This is why Models are important...

Reassigning workflow usually means your content may change states – be careful!

Folder-based workflow

Available for content that is always approved and published together (*rarely used*)

The screenshot displays the CrownPeak WCM interface. The top navigation bar includes 'GoTo', 'New', 'Action', and 'Workflow' menus. The breadcrumb trail shows 'Sandbox TDW > TDW Example > Example Page'. The main content area is titled 'Workflow' and features a 'Select a Workflow:' section with a dropdown menu currently set to 'Basic Workflow'. A sidebar on the left contains navigation icons for 'Dashboard', 'Content', 'Reports', 'Settings', 'Help', and 'Apps'. At the bottom, there is a 'CrownPeak' logo and a status bar with 'File View' and 'Page View' buttons. A small notification at the bottom right indicates '(0) additional items will be affected'.

The Number One Best Practice: **Keep it simple!**

It is easy to get caught up in intricate processes

Complexity will spider-web to other areas

Complex Workflow means much more complex Models, Publishing, Permissions, and more

Keep it “real”

As you design a workflow, think about how it’s actually going to be used – and imagine describing it to someone, face-to-face – not via email

The “5:30pm on a Friday” scenario

It’s 5:30pm on a Friday, and you need to get a document live...

Policy vs. Technology

Just because you “can” do something with Workflow, doesn’t mean you have to...

The CMS presents plenty of data on users – easy to see who did what, where, and when

Remember: the CMS will not publish links between documents in different states

Live content is “Live” and Stage is “Stage” for a reason

Always think about your users

System adoption: very important!