Workflow Manager

Overview

Creating and applying Workflows within the Active CM is how you control which users can edit, monitor and approve pages and sections of a site. A Workflow corresponds to a series of steps involved in completing a process: moving content through the edit, review and approval phase into publication. Each step within a Workflow consists of a task, and of one or more people who perform the task. For example:

1. Persons A, B, and C all create content (Content Providers) and submit it for approval.
2. Person D then reviews and approves (Approver Level 1) their content.
3. Person E then gives the final stamp of approval (Approver Level 2) of the content for publication.
4. Persons F and G simply receive email notification (Monitors) of the new content.

When you create your groups, you will see the three different Workflow type groups you can add users to: Provider, Approver and Monitor. Once Workflows have groups or users assigned to them, they are applied to pages and sections of your site. A user will not be able to change the workflow of a page in the workflow manager if the page is currently being edited by another user. The —(Edit)|| hyperlink will change to display —(Locked for Editing)||. If a user, attempts to change the workflow of a group of pages that includes a page being edited, a message must appear stating that the workflow change cannot be applied because pages in the group are being edited.

Workflow Folders

It‘s good practise to organize the Workflow folders to correspond with the group folders. Workflows will be saved within these folders.

Create Workflow Folder

1. Open the **Workflow Manager**.
2. Click **Manage Folders**.
3. Click **Add Folder**.
4. Enter the **Name** of the new folder.
5. Provide a **Description** of the folder that others will see when viewing folders.
6. Select the **Parent Folder** for the new folder. This will determine the folder's location in the folder hierarchy.
7. Click **Save**. Repeat for all folders you wish to create.

Locate Workflow Folder

1. Open the **Workflow Manager**.

2. Click **Manage Folders**.

3. Using the **Parent Folder** dropdown expand the folder view until the folder is located.

Modify Workflow Folder

1. Open the **Workflow Manager**.

2. Click **Manage Folders**.

3. Select the **Parent Folder** of the folder you want to modify.

4. Click the **Folder Name** to view the folder details.

5. Modify the **Name** or **Description** fields, or select a new parent folder.

6. Click **Save**.

Delete Workflow Folder

1. Open the **Workflow Manager**.

2. Click **Manage Folders**.

3. Select the **Parent Folder** of the folder you want to modify.

4. Check the **Delete** box to the right of the Folder you want to delete. Click **Save**. OR Click the **Folder Name** to view the folder details. Click **Delete**.

5. Click **OK** in the confirmation dialog box.

Workflows

Try to make Workflow names descriptive of who uses it. For example: HR workflow for the Human Resources area of the site. Once you have created a Workflow, if you need to create additional Workflows that have the same member groups and properties, you can copy the Workflow and save it with a new name.

Create a Workflow

1. Open the **Workflow Manager**.

2. Click **Manage Workflows.**

3. Click **Add Workflow.**

4. In the **Workflow Details** section, make sure the **Active box** is checked.

5. Enter the **Name** of the workflow.

6. From the **Folder** drop-down, select the folder for the workflow to be saved in.

7. If you want the group to have access to all sites, leave the **Available in all sites** checkbox checked. If you want the group to have access to some sites but not others, uncheck **Available in all sites** and select individual sites.

 Note Make sure your site settings are the same as the group site settings that will be used in the workflow. If they are different you will not see the groups you intend to set within the workflow.

8. Click **Save** or **Save and Add** to continue creating new Workflows without assigning any User Groups to the Workflow.

Assign Providers

Providers are the users who are responsible for creating and editing content.

1. Click **Manage Workflows** and add or edit the Workflow you want to assign Providers to.

2. Go to the **Providers** tab and under the **ROLE** column, click on the **Provider(s):** link.

3. Select a group on the **Groups** tab or specific individuals from the Individuals tab.

 Note When adding individuals, you must place a checkmark beside each name you wish to add and then scroll down and click **Add Selected**. Then click **OK**. **Group not there?** If you do not see a group that you expected to, it means that you did not set the Group Type to —Provider,‖ or that that the Group and Workflow are assigned to the different Site(s). You need to return to the Group Manager and check the group settings.

4. Click **Save**.

Assign Monitors

Monitors are the individuals who will receive notification of content changes.

1. Click **Manage Workflows** and add or edit the workflow you want to assign Monitors to.

2. Go to the **Monitors** tab and under the **ROLE** column, click on the **Monitor(s):** link.

3. Select a group on the **Groups** tab or specific individuals from the **Individuals** tab.

 Note When adding individuals, you must place a checkmark beside each name you wish to add and then scroll down and click **Add Selected**. Then click **OK**. **Group not there?** If you do not see a group that you expected to, it means that you did not set the group type to —Monitor,‖ or that that the Group and Workflow are assigned to the different Site(s). You need to return to the Group Manager and check the group settings.

4. Click **Save**.

Assign Approvers

For each approval level that you create, you can add one or more Groups or Users who will be responsible for approving content.

 Note If you create a Workflow and do not add any Approvers, the Providers assigned to that Workflow will be able to publish their own content.

1. Open the **Workflow Manager**.
2. Click **Manage Workflows** and add or edit the workflow you want to assign Approvers to.
3. Go to the **Approval Levels** tab and click **Add Approval Level.**
4. In the **LEVEL** column, click on the **Level 1** link.
5. Select a group on the **Groups** tab or specific individuals from the **Individuals** tab.

 Note When adding individuals, you must place a checkmark beside each name you wish to add and then scroll down and click **Add Selected**. Then click **OK**. **Group not there?** If you do not see a group that you expected to, it means that you did not set the group type to —Approver,‖ or that that the Group and Workflow are assigned to the different site(s). You need to return to the Group Manager and check the group settings.

6. Select an option from the Approval drop-down.

 One: One vote needed to Approve. All votes needed to Reject.

 All: All votes needed to Approve. One vote needed to Reject.

 Majority: The majority of votes needed to Approve. 50% or more needed to Reject.

Understanding Approval Options: If only —One‖ person is required to approve a page, the ACM cannot know if the page has been approved until either a) someone approves the page or b) everyone has voted and rejected the page. If the —All‖ approval status is used, the ACM cannot know if the page has been approved until either a) someone rejects the page or b) everyone has voted and approved the page.

An Approver can vote multiple times if desired (only the latest vote counts). If the action represents a changed vote, the user receives a confirmation message and can add a new Note. After each vote, the page's approval/rejection status is evaluated based on the current tally of votes, the current rule for that level, and the current approval level membership.

7. Use the default number of **Escalation Days** or change the setting. When the escalation period is reached, notification that action is required on the page is sent to the next level of approver and to the Monitor and System Administrator groups.

8. Repeat this procedure to create additional Approval levels if required. Each subsequent approval level will receive an email notification when the previous level has finished their review.

9. Click **Save.**

Locate Workflow

1. Open the **Workflow Manager**.

2. Click **Manage Workflows**.

3. Enter a partial or full workflow name; select a folder using the **Choose a** Folder dropdown. Click **Search**. All groups matching the search term will be displayed. OR

4. Browse workflows by selecting a folder using the **Choose a Folder** dropdown. All workflows within the selected folder will be displayed.

Copy Workflow

This process can take place at any time while creating or editing a Workflow while in the Workflow Details page.

1. Open the **Workflow Manager**.

2. Click **Manage Workflows**.

3. Locate the Workflow you want to copy.

4. Click the name of the Workflow you want to copy. Workflow Details Page will open.

5. Click **Save & Copy**.

6. Workflow will be copied and default name created —Copy of Workflow‖.

7. Change the **Workflow Name** to something unique.

8. Click **Save**.

Modify Workflow

1. Open the **Workflow Manager**.

2. Locate the Workflow you want to modify.

3. Click **View Usage** for a report of what sites and pages the Workflow is assigned to.

4. Modify the Workflow as required.

5. Click **Save**.

Delete Workflow

1. Open the **Workflow Manager**.

2. Locate the Workflow you want to delete.

3. Check the **Delete** box to the right of the Workflow(s) you want to delete. Click **Save**. OR

4. Click the **Workflow Name** to view the Workflow details. Click **Delete**.

5. Click **OK** in the Confirmation Dialog box.

Tip If you attempt to delete or make a Workflow inactive and the Workflow is assigned to pages, you will receive a message warning of this fact and the Workflow will not be deleted. You must first remove the Workflow from all assigned pages. You will then be able to delete or make the Workflow inactive.

Applying Workflows

1. Open the **Workflow Manager**.

2. Make sure the correct site is selected in **Site** dropdown.

3. From the **Page List**, locate the page to assign a Workflow to and click the (**Edit**) link at the end of the Title.

4. On the **Select Workflow** dialog, either:

 Select **Use Parent Page's Workflow** if you want the page to use the same Workflow assigned to its parent page.

- Select the Workflow from the list if you want the page to have a Workflow that is different than that of the parent page.

5. If you want to force all child pages of the page to use the same workflow, click **Set Child Workflows**.

6. Click **Save** on the **Select Workflow** dialog. The name of the Workflow you just assigned appears in brackets now at the end of the page name.

- **Note** If you force the Workflow to child pages by setting Child Workflows, the assigned Workflow not appear on all the child pages, it will only appear in brackets at the end of the parent page name.