

Workflow is a sequence of steps that define the life cycle of a page. This allows for setting up a reviewing and approval process to ensure quality of content and design. In such a process, you can specify the roles that different people will play and the places in the flow where the individual people will have influence on a particular page.

You can create and manage workflows in the Workflows application.

Creating a basic workflow

In a basic workflow, one step is followed by another in a direct sequence. A basic workflow cycle of a page starts in the **Edit** step, which means the page is newly created or that there are yet unapproved changes in the page. After going through the defined approval steps, the page gets into the **Published** step. At that point the system makes the last version of the page visible on the live site.

- 1. Open the **Workflows** application.
- 2. Click New workflow.
- 3. Choose a name for the new workflow and type it in the **Display name** text box.
- 4. Click Save.

The workflow appears in the list on the **Workflows** page. Now you can proceed with <u>applying the workflow on pages</u> and <u>defining workflow steps</u>.

Creating an advanced workflow

Advanced workflow significantly differs from basic workflow in the way how you design the flow of steps. You can let a page go through different steps based on various conditions, you can allow editors to choose which step they want the page to be moved to, or you can set timeouts for automatically moving pages from one step to another.

- 1. Open the Workflows application.
- 2. Click New advanced workflow.
- 3. Choose a name for the new workflow and type it in the **Display name** text box.
- 4. Click Save.

The workflow appears in the list on the **Workflows** page. Now you can proceed with <u>applying the workflow on pages</u> and designing the workflow process.

Converting a basic workflow to advanced workflow

The Workflow page allows you to convert a basic workflow to an advanced workflow. Note that you cannot convert an advanced workflow back to a basic workflow. The operation also resets the workflow version history tracked on the **Versions** tab.

- 1. Open the Workflows application.
- 2. Edit () a basic workflow.
- 3. If the Automatically publish changes check box is selected, clear the check box and click Save.
- 4. Click Convert to advanced workflow.
- 5. Click **OK** to confirm the conversion.

The system converts the basic workflow to an advanced workflow. All the defined steps are converted into advanced workflow steps.

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