----------------This chapter describes how to enhance a workflow process with configurable automatic actions.

Using **action steps**, you can automate tasks that editors would have normally had to do manually after a page reached a certain step. For example, you might want to move a page to another section of the site the moment it reaches the Archived step. Advanced workflow makes this possible with the **Move page** action step.

The following is a list of all available action steps:

- **Copy page** - copies a specified page to another location.
- **Delete page** - deletes a specified page.
- **Import translation** - imports translations of the page that are ready.
- **Link page** - creates a linked page.
- **Move page** - moves a specified page to another location.
- **Publish to Facebook** - automatically sends a predefined post on Facebook.
- **Publish to Twitter** - automatically sends a predefined post on Twitter.
- **Send for translation** - submits a page for translation using the specified translation service.
- **Send emails** - sends emails based on a specified email template.
- **Send notification emails** - sends emails according to the email settings defined for the step that immediately follows.
- **Set page property** - assigns a specified value to a page's property.
- **Synchronize page** - synchronizes a specified page to all enabled staging servers on the site the page is on.

For information how to add and configure a particular action step, refer to its respective section of this topic.

Manipulating pages within a workflow process

Copying a page

1. Drag and drop the **Copy page** step onto the grid.
2. Connect the step with a preceding step and optionally with a following step.
3. Edit the step ( ).
4. (Optional) Specify the page that you want to copy using the following properties:
   - **Source site** - site that the page should be copied from. If you don't specify a site, the current site will be used.
   - **Source path** - path to the page that should be copied. If you don't specify a page, the current page (i.e., the one that reaches the step) will be used.

5. (Optional) Adjust the following properties:
   - **Include child pages** - copies also all child pages of the copied page.
   - **Copy permissions** - prevents resetting permissions for the page.

6. Specify the page under which you want to make the copy using the following properties:
   - (Optional) **Target site** - site that contains the parent page for the copy. If you don't specify a site, the current site will be used.
   - **Target path** - path to the parent page for the copy.

7. Click **Save**.

Moving a page

1. Drag and drop the **Move page** step onto the grid.
2. Connect the step with a preceding step and optionally with a following step.
3. Edit the step ( ).
4. (Optional) Specify the page that you want to move using the following properties:
   - **Source site** - site that the page should be moved from. If you don't specify a site, the current site will be used.
   - **Source path** - path to the page that should be moved. If you don't specify a page, the current page(i.e., the one that reaches the step) will be used.

5. (Optional) Adjust the following properties:

- **Only child pages** - makes the action step move only the child pages of the specified page and not the page itself.
- **Preserve permissions** - moves the page without resetting its permissions.

6. Specify the page under which you want to move the page:
   - (Optional) **Target site** - site that contains the parent page for the move. If you don't specify a site, the current site will be used.
   - **Target path** - path to the parent page for the move.

7. Click **Save**.

Creating a linked page

1. Drag and drop the **Link page**step onto the grid.
2. Connect the step with a preceding step and optionally with a following step.
3. Edit the step (✏).
4. (Optional) Specify the page that you want to link using the following properties:
   - **Source site** - site that the page should be linked from. If you don't specify a site, the current site will be used.
   - **Source path** - path to the page that you want to link. If you don't specify a page, the current page (i.e., the one that reaches the step) will be used.

5. (Optional) Adjust the following properties:
   - **Include child pages** - creates also links to the child pages of the page.
   - **Copy permissions** - copies the permissions for the page to the linked page.

6. Specify the page under which you want to create the link:
   - (Optional) **Target site** - site that contains the parent page for the link. If you don't specify a site, the current site will be used.
   - **Target path** - path to the parent page for the link.

7. Click **Save**.

Deleting a page

1. Drag and drop the **Delete page** step onto the grid.
2. Connect the step with a preceding step and optionally with a following step.
3. Edit the step (✏).
4. Specify the page that you want to delete using the following properties:
   - **Source site** - site that the page should be copied from. If you don't specify a site, the current site will be used.
   - **Source path** - path to the page that should be copied. If you don't specify a page, the current page (i.e., the one that reaches the step) will be used.

5. (Optional) Adjust the following deletion properties:
   - **Destroy page** - deletes the page without a chance to restore it from the Recycle bin.
   - **Delete all culture versions** - if the page is translated to more than one culture, the property makes sure that all the culture versions will be deleted.

6. (Optional) Define a redirection page for the deleted page. When visitors request the deleted page's URL, the system redirects them to the redirection page. You can also adjust the following related settings:
   - **Redirect all page aliases** - the replacement page will be accessible via all the deleted page's URLs instead of only the default one.
   - **Redirect all child pages** - the replacement page will be applied also to child pages of the deleted pages.

7. Click **Save**.

Adjusting page properties

You can use the **Set page property** action step to modify properties of a page, including page type specific fields.

1. Drag and drop the **Set page property** step onto the grid.
2. Connect the step with a preceding step and optionally with a following step.
3. Edit the step (✎).
4. Specify the page that you want to modify using the following attributes:
   - **Source site** - site that the page is on. If you don't specify a site, the current site will be used.
   - **Source path** - path to the page that you want modified. If you don't specify a page, the current page (i.e., the one that reaches the step) will be used.

5. Enter the name of the property that you want to modify. To learn what properties pages have, consult Page database structure. The properties are listed in the *CMS_Tree* and *CMS_Document* tables.
6. Enter a new value for the property. Make sure the type of the data you entered matches the data type of the respective database column.
7. Click **Save**.

Synchronizing a page to staging servers

You can use the **Synchronize page** action step to synchronize changes in a specified page to other servers using the Staging.

1. Drag and drop the **Synchronize page** step onto the grid.
2. Connect the step with a preceding step and optionally with a following step.
3. Edit the step (✎).
4. Specify the page that you want to synchronize using the following properties:
   - **Source site** - site that the page should be synchronized from. If you don't specify a site, the current site will be used.
   - **Source path** - path to the page that should be synchronized. If you don't specify a page, the current page (i.e., the one that reaches the step) will be used.

5. (Optional) Adjust the following properties:
   - **Include child pages** - synchronizes also all child pages of the synchronized page.
   - **Log update tasks** - forces synchronization of pages that don't have any tasks generated for them. If you turn this setting off, the system will check whether there are any staging tasks generated for the page and synchronize them.

6. Click **Save**.

Configuring workflow to automatically post to Facebook and Twitter

You can find more information about the auto post feature at Configuring automatic posting to social media.

1. Connect Kentico to Facebook or Twitter using an App.
2. Create a Facebook page or a Twitter channel. Enable the **Default** check box when creating the page or channel.
3. Drag and drop the **Publish to Facebook** or **Publish to Twitter** step onto the grid.
4. Connect the step with a preceding and following step (the best position is before the Publish step).
5. Edit the workflow step (✎).
6. Enter the Text of the message which will be automatically posted on Facebook/Twitter when going to the next step.
   - You can click the provided button to open an editor with a macro selection control to define a message using macros. For example, Check out our new blog post at www.mydomain.com{% GetDocumentURL() %}.

7. Click **Save**.
8. Edit the previous step and set a **User action text** field to a suitable button text, for example, Publish to Facebook.
   - The default button text, which will be visible to content editors, is **Submit for approval**.
9. Click **Save**.

Configuring workflow to automatically send emails

Advanced workflow offers two ways of incorporating sending of emails into a workflow process:

- **Send emails action step** - sends an email to specified recipients. You can choose an email template or write the text of the email from scratch.
- **Send notification emails action step** - sends emails associated with the next step to the content <u>editors, who are allowed to work with pages in the next step</u> of the workflow. You can use this step in a combination with the <u>Wait step or timeout settings</u> to notify users that a page is waiting for their approval for a long time.

Adding a Send emails step

1. Drag and drop the **Send emails** step onto the grid.
2. Connect the step with a preceding and a following step.
3. Edit the step (✏).
4. (Optional) Enter the sender's email address. If you don't enter any address, the value from *Settings -> Content -> Content management -> Send workflow emails from* will be used.
5. Enter the recipients of the email into the **To** field. Separate multiple recipients by semicolons.
6. Specify the text of the email. You have two options:
   - **Select an email template** or create a new one.
   - Select **HTML formatted text** in the **Based on** field and write the text into the text area that appears.

7. Click **Save**.

Adding a Send notification emails step

1. Drag and drop the **Send notification emails** step onto the grid.
2. Connect the step with a step that will precede. This should typically be a Wait step or a step with a defined timeout.
3. Connect the step with a step that will follow. This is the step that the notification steps will be sent for.

Managing page translations within workflow

You can leverage the following two action steps to facilitate translation of pages within a workflow process:

- **Send for translation** - submits the current page for translation using the specified translation service.
- **Import translation** - if the current page's translation is ready, imports the translated data into the respective culture version of the page.

You can find more information about translation services in the <u>Configuring translation services</u> chapter.

Sending a page for translation

1. Drag and drop the **Send for translation** step onto the grid.
2. Connect the step with a preceding and optionally a following step.
3. Edit the step (✏).
4. Set the following attributes:
   - Translation service to use
   - Target language
   - Translate page attributes
   - Priority
   - Translation deadline
   - Instructions for translators

5. Click **Save**.

Importing translations

1. Drag and drop the **Import translation** step onto the grid.
2. Connect the step with a preceding and optionally a following step.