There are two ways in which you can apply a workflow on pages on your site:

- <u>Directly applying a workflow on a page</u> use this option if you want to apply a workflow on a page, or a page and its children, directly from the **Pages** application. Applying a workflow directly also creates a <u>workflow scope</u>.
- <u>Creating a workflow scope</u> use this option if you want to have more control when applying a workflow on the pages on your site. You can exclude pages from a workflow and control to which page types and cultures the scope applies. You can also create special conditions for each scope.

## Applying workflows on pages in the Pages application

This functionality is useful when you want to apply a workflow on a page, or a page and its children, directly from the **Pages** appli cation. For example, when you create a page outside of an existing workflow scope.



Users need to have the Manage workflow permission assigned in the content module to be able to use this functionality.

- 1. In the **Pages** application, navigate to the page that you want to apply a workflow on.
- 2. Click **Apply workflow**. A dialog box opens.
- 3. Select the workflow that you want to apply on the page.
- 4. Choose from the following options:
  - a. To this page only
  - b. To this page and its children
- 5. Click Save & Close.



Applying a workflow on a page directly also creates a workflow scope that can be edited later.

# Defining workflow scopes

A workflow scope defines the conditions based on which a workflow will be applied to pages. When creating a workflow scope, you have to specify a page's path and whether you want to include child pages under this path. Then you can narrow down the set of covered pages by specifying some of the following parameters:

- page type
- culture
- macro condition

The system offers two types of scopes - **allowed** and **excluded**. This way you can apply a workflow on a large section of a site and then exclude sections, which you don't want the workflow to be applied on.

#### **Workflow priority**

If a page matches scopes of multiple workflows, the workflow with the most specific parameters is applied on the page. Scopes are applied with the following priorities, from highest to lowest:

- 1. Scope with specified page type and culture
- 2. Scope with specified **page type**
- 3. Scope with specified culture
- 4. Scope without specified page type and culture.
- 5. Scope with the longest **path**.
- 6. Scope that covers only the specified **page without children**.
- 7. Scope that has its type set to **Excluded**.
- 8. Scope with specified macro condition.

### **Workflow priority examples**

The following table presents the most common scenarios, where scopes from two different workflows (**Scope 1** and **Scope 2** columns in the table) conflict with each other. The **Result** column explains which scope takes priority.

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Scope 1 setup	Scope 2 setup	Result
This scope covers: /News	This scope covers: /News Page type: Press releases	Press releases under the News page will use Scope 2, the News page itself and its other children will use Scope 1.
This scope covers: /Pro ducts	This scope covers: / Products /Smartphones	All pages under the Products page will use Scope 1, except for the Smartphones page and its child pages, which will use Scope 2.
This scope covers: /Products	This scope covers: /Products /Smartphones Only specified page	All pages under the Products page will use Scope 1, except for the Smartphones page, which will use Scope 2. However, children under the Smartphones page will use Scope 1.

## Creating a workflow scope

Before creating a workflow scope, you need to <u>create a workflow</u> first.

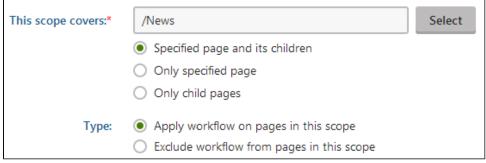
- 1. In the **Workflows** application, edit an existing workflow.
- 2. Select the **Scope** tab.
- 3. Choose a site you want the scope to be effective on using the **Site** drop-down list.
- 4. Click New workflow scope.
- 5. Define the part of the content tree that you want to be covered by the scope. Click **Select** next to the **This scope covers** property.
- 6. In the dialog that opens, choose the page you want covered by the scope.
- 7. Specify whether you want to cover the page and its child pages, only the page or only its children.
- 8. Select if you want the scope to be allowed or excluded. Keep the following behavior in mind when working with exclusions:



#### **Working with exclusions**

Exclude workflow from pages in this option applies only to the workflow under which it has been specified and does not override scopes in different workflows.

For example, under *Workflow 1*, you have "/Products" and its children allowed and "/Products/Smartphones" excluded. Under *Workflow 2*, however, you have "/Products" and its children allowed and no exclusion specified. The exclusion specified under *Workflow 1* will have no effect on the scope of *Workflow 2*.



9. Click Save.

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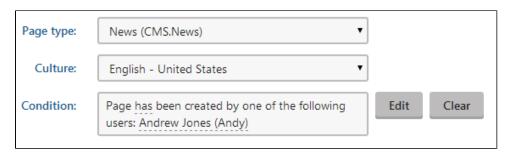


If you want the scope to cover the whole site, or you want to specify only the parameters in the Advanced section, enter "/" (i.e. the path of the root page) in the field next to the **This scope covers** property. Make sure that the scope covers the specified page including its children.

#### **Advanced options**

You can use these options to further refine the workflow scope. Keep in mind that the steps within the **Advanced** sections are optional.

- 1. Choose a page type. The workflow will be applied only on pages of this type.
  - a. Make sure the desired page type is assigned to the site you have selected.
  - b. If you had to assign the page type to the site, click **Save** to refresh the page and load the newly assigned page type.
  - c. Select the page type from the **Page type** drop-down list.
- 2. Specify a culture. The workflow will be applied only on pages in this culture.
  - a. Make sure the culture is assigned to the site you have selected.
  - b. If you had to assign the culture to the site, click **Save** to refresh the page and load the newly assigned culture.
  - c. Select the culture from the **Culture** drop-down list.
- 3. Enter a macro condition. If the condition is met when starting a workflow cycle on a page within the scope, the workflow will be applied to the page.



- 4. Save the workflow scope.
- 5. If you want to apply the workflow to an existing page within the scope, make changes to the page.
  - If you're using basic workflow, navigate to the page in the **Pages** application and click **Save**.
  - If you're using advanced workflow, navigate to the page in the **Pages** application and click **New version**.

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