

Creating or editing a workflow

To locate your workflows, select **Tools** from the menu bar and then select the **Workflows** tab.

You can create your own workflow from scratch, or copy an existing workflow and adapt it to your needs. You can create or edit a workflow for either articles or files.

- To create a new workflow, click **Add new** to open the Workflow form.
- To edit a workflow, click the actions icon in the workflow's row and select **Edit**.
- To make a copy you can adapt, click the actions icon in the workflow's row and select **Copy**.

The workflow form appears, with blank fields if it is for a new workflow and with the existing information if you are editing or copying an existing workflow.

Note: you can't edit an active workflow. First change the workflow's status to "inactive" and then open it for editing. When you have completed the edits, you can change the status back to "active".

The screenshot shows the KBPublisher interface. The top navigation bar includes a home icon, a user icon, and a document icon. Below it, the 'Tools' menu is open, showing options: Tools, Lists, Tags, Custom Fields, Automations, and Workflows (which is selected). The 'Workflows' section has two tabs: 'Articles' (selected) and 'Files'. A blue 'Add new' button is at the top of the form. The form fields include: a required 'Title' field; a 'Conditions' section with a dropdown set to 'All' and the text 'of the following conditions are met:', followed by a row of three conditions: 'Draft Is', 'Is', and 'Published', each with a dropdown and a '+' or '-' button; a 'Steps' section with the text 'Perform the following steps:', followed by a step numbered '1.' with a title field, an 'Assign to' dropdown, and a '[category supervisors]' dropdown; an 'Optional Approval' section with a checkbox 'Allow users to bypass the approval process'; and an 'Active' section with a checked checkbox 'Yes'. At the bottom are 'Save' and 'Cancel' buttons.

Complete the fields in the form:

- **Title** -- Provide a unique, distinctive title for this workflow.
- **Conditions** -- Add one or more conditions that the workflow evaluates each time it runs. You can set the workflow to take action if **any** of the conditions are true, or if **all** conditions are true. In the example above the workflow conditions apply to articles that have been published and where the author's privilege level is greater than "author" (the author is also an editor, for example).
 - To add conditions, click the **[+]** button to the right of the field.
 - Each condition can apply to one of these:
 - Whether the draft is published or not.
 - The author's privilege level.
 - The author's identity.
- **Steps** -- Provide one or more steps for the workflow to take if the Conditions section evaluates to true.
 - Add steps by clicking the **[+]** button to the right of the field.
 - For each step, provide:
 - A title for the step.
 - The action to take (like "assign" the article or file).
 - Where relevant, the person or role to assign the article or file to. Select from the options provided.
- **Optional Approval** -- Select the checkbox to allow users to bypass the approval process in the workflow.
- **Active** -- By default, each workflow is set as active. To deactivate it, uncheck this check box. The workflow appears in the **Inactive workflows** list.

Click **Save** to save the workflow and add it to the active or inactive list.

Click **Cancel** to abandon your edit and close the form.

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