

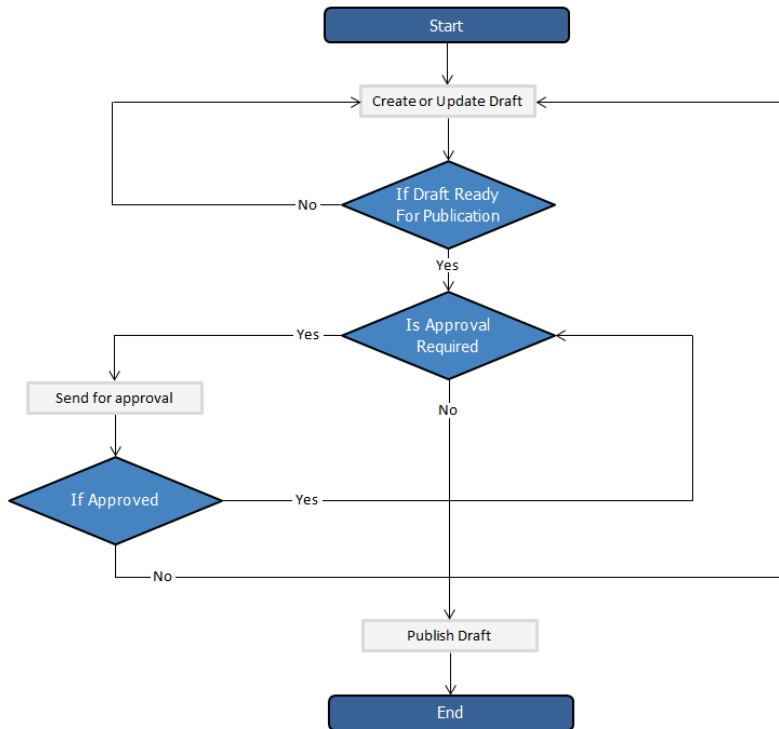
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Workflows automate processes for reviewing, approving, and publishing articles. This can save you time and make sure articles that may be ready to publish, but need approval, are not overlooked. If the item requires review and approval before it is published, a workflow can transfer the item to the worklist of the person who is responsible for approving it. That person can approve the article or send it back for further edits.

Workflow Flowchart

The image below shows the path the draft of an article or file might have to follow if, after the author has written or uploaded it, one or more people have to review and approve it before publication.

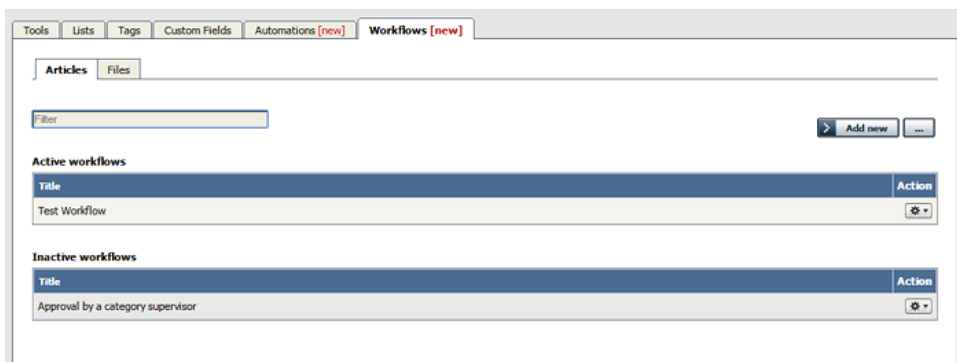


Essential facts for workflows

- Workflows are applied to drafts of articles and files only
- You cannot delete or edit a workflow which in use (is applied to some drafts).
- You can have as many approval steps in a workflow as your project's process requires.

Manage Workflows

To access your workflows, select **Tools** from the menu bar. Then select the **Workflows** sub-tab:



The tab displays both your active and inactive workflows for either articles or files. Switch between the **Articles** and **Files** tabs to see all existing workflows. If the list is long, enter a keyword in the **Filter** field to display just the workflows that have that keyword in their titles. To restore the full list, remove all text from the **Filter** field.

For each workflow, you can click the button in the **Action** column and select an action to perform:

- **Change status** - Select to change the status of the workflow from active to inactive, or from inactive to active. A confirmation message appears to make sure you want to change this status.
- **Duplicate** - Make a copy of the workflow that you can then edit. This helps you quickly create workflows that are similar to existing ones.
- **Edit** - Edit the workflow. See [Creating or editing a workflow](#).
- **Delete** - Select to delete the workflow. A confirmation message appears to confirm you want to do this.

Note: You cannot delete a workflow that is in use. Updates are limited while some drafts it relates to are being approved.

Add a Workflow

To add a workflow, click **Add new** and complete the form. See [Creating or editing a workflow](#).

Reorder

To change the display order of the workflows, click the [...] icon and choose **Reorder** from dropdown menu.

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 a web-based form for editing a workflow. The form is titled "Edit" and has a tabbed interface with "Articles" and "Files" tabs. The main content area is divided into several sections: "Title" (with the text "Approval by a category supervisor"), "Conditions" (with a dropdown set to "All" and the text "of the following conditions are met:"), and "Steps" (with the text "Perform the following approval steps:"). The "Conditions" section contains two conditions: "Draft is Published" and "Author's privilege level is Greater Than Author". The "Steps" section contains one step: "1. Review by category supervisors", which is assigned to "[category supervisors]". There is an "Active" checkbox which is checked. 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.
- **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.

Workflow examples

Here are some examples of how to use workflows for drafts of material that need review and approval before publication.

Simple, one-step approval

When you have users with the "contributor" privilege adding a drafts, use a workflow like this to alert the category supervisor when draft content is ready for review.

The screenshot shows a workflow configuration interface with the following fields:

- Title:** Approval by a category supervisor
- Conditions:** if All of the following conditions are met:
 - Author's privilege level Is Equal To Contributor
- Steps:** Perform the following approval steps:
 1. Review by category supervisors
 - Assign to [category supervisors]
- Active:** Yes

The workflow checks for draft content that has been submitted for review by a "contributor" user and assigns such content to the appropriate supervisor. If the category has no supervisor assigned, KBPublisher parses the category tree to find the appropriate supervisor. If no category supervisor can be found, the system sends a message about the draft to the email address defined in **Settings > Email > Admin Email**.

You should assign a supervisor at least for each top category (the same supervisor can be responsible for multiple categories). See [Can I route an Approval email based on the category?](#) for information about assigning category supervisors.

Assign to a specific approver

When you want a specific staff member to review draft submitted for publication, use a workflow like this that identifies the specific user:

The screenshot shows a workflow configuration interface with the following fields:

- Title:** Assign to user
- Conditions:** if All of the following conditions are met:
 - Author's privilege level Is Less Than Editor
- Steps:** Perform the following approval steps:
 1. Assign to user
 - Assign to [current user: Evgeny Leor]
- Active:** Yes

When a user with the "author" or "moderator" privilege adds a draft, the draft will be assigned for review to the person specified. In the example above, the person is the current logged-in user; but you can assign any user to review the material.

Multiple-step approval

If your workflow requires multiple approval steps before draft material is published, use a workflow like this one:

Add new

Title: *

Conditions: * if of the following conditions are met:

Steps: * Perform the following approval steps:

1.

2.

Active: Yes

In this example, when a contributor creates a new draft, the draft will be assigned for review to a user with "editor" privileges. When the editor has approved the material for publication, the draft is assigned to a user with "moderator" privileges for final review and approval. When the moderator has approved the material, it is published.

You can add as many approval steps as your project's process requires.

As with the first example, if KBPublisher cannot find a user with "editor" or "moderator" privileges, it sends a message about the draft material to the email address defined in **Settings > Email > Admin Email**.

