

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.

Edit	
* Title:	Approval by a category supervisor
* Conditions:	if All of the following conditions are met: <div>Author's privilege level Is Equal To Contributor + -</div>
* Steps:	Perform the following steps: <div>1. Review by category supervisors + - Assign to [category supervisors]</div>
Optional Approval	<input type="checkbox"/> Allow users to bypass the approval process ?
Active:	<input checked="" type="checkbox"/> 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:

Edit	
* Title:	Assign to user
* Conditions:	if All of the following conditions are met: <div>Author's privilege level Is Less Than Editor + -</div>
* Steps:	Perform the following steps: <div>1. Assign to user + - Assign to [current user: John Smi]</div>
Optional Approval	<input type="checkbox"/> Allow users to bypass the approval process ?
Active:	<input checked="" type="checkbox"/> 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:

Edit																	
* Title:	Two steps workflow																
* Conditions:	if All of the following conditions are met: <table border="1"> <tr> <td>Draft Is</td> <td>Is</td> <td>Published</td> <td>+</td> <td>-</td> </tr> </table>	Draft Is	Is	Published	+	-											
Draft Is	Is	Published	+	-													
* Steps:	Perform the following steps: <table border="1"> <tr> <td>1.</td> <td>Review, update</td> <td>+</td> <td>-</td> </tr> <tr> <td></td> <td>Assign to</td> <td>[privilege: Editor]</td> <td></td> </tr> <tr> <td>2.</td> <td>Final approve</td> <td>+</td> <td>-</td> </tr> <tr> <td></td> <td>Assign to</td> <td>[privilege: Moderator]</td> <td></td> </tr> </table>	1.	Review, update	+	-		Assign to	[privilege: Editor]		2.	Final approve	+	-		Assign to	[privilege: Moderator]	
1.	Review, update	+	-														
	Assign to	[privilege: Editor]															
2.	Final approve	+	-														
	Assign to	[privilege: Moderator]															
Optional Approval	<input type="checkbox"/> Allow users to bypass the approval process ?																
Active:	<input checked="" type="checkbox"/> 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**.

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