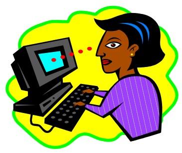
Quick Reference Guide

Workflow

Workflow is an automated approval process that can be added to your site contributions. The content contributor may edit web pages and upon submittal, the approver will accept or reject those changes and ultimately publish them.

This quick reference guide takes you through the steps to ensure your workflow has been successfully submitted.

At a Glance

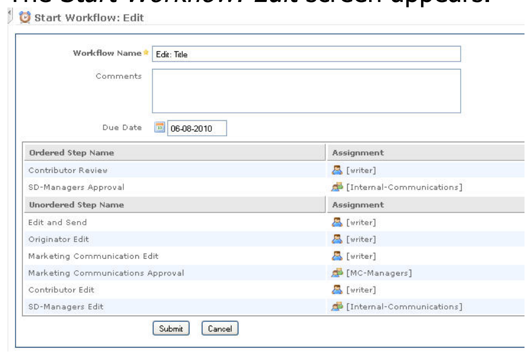
EDIT 	Edit your page as usual. After you have completed your edits, scroll down to the end of the page and click the **Submit** button.	The Start Workflow Screen displays.
START 	Enter a name for your workflow being sure to enter comments for your approver. The comments will provide details regarding your change, which will in turn help expedite your turnaround time.	You are returned to the workflow screen. But, wait…there's more!
FORWARD 	In order for your changes to be made live, you must forward them to your website approver. To do this: 1. Click the '**Forward to XX-Manager**' link 2. Enter a comment (optional, but recommended to expedite the approval process) 3. Click the **Submit** button.	The Approver will receive an email notifying them of a new workflow. You will be notified of any issues or changes in the workflow via email.

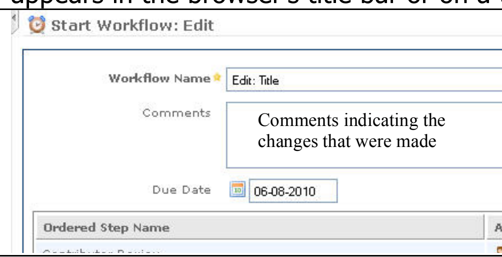
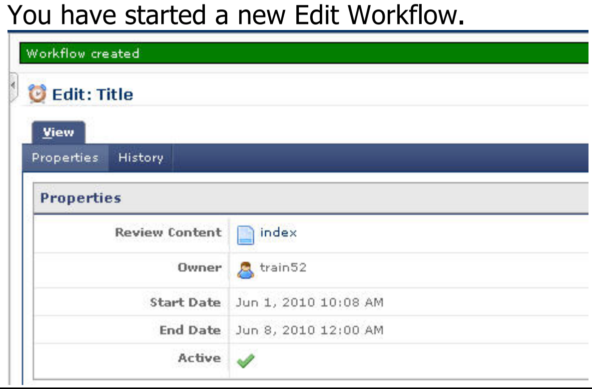
Quick Reference Guide

Starting a Workflow

This step enables you to save the changes you have made.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>Now that you have edited your page, you must now save the changes.

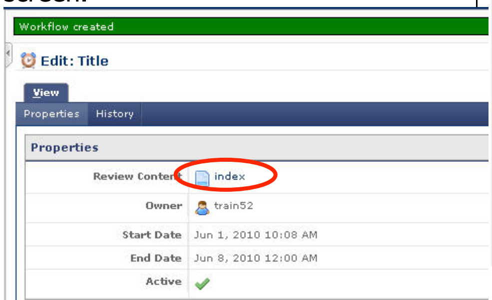
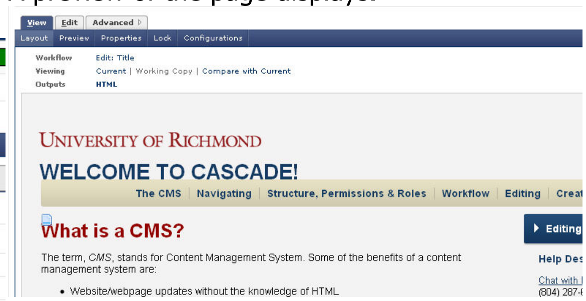
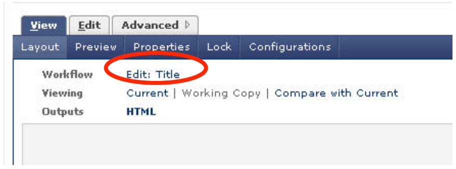
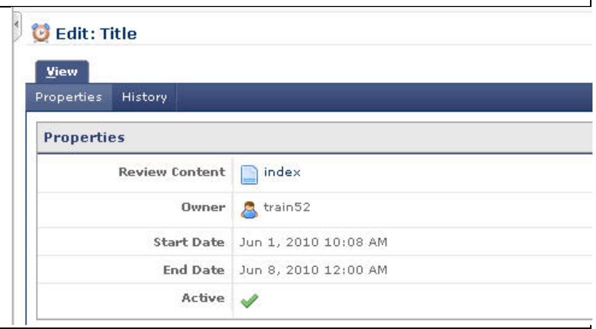
Click the Submit button.</td><td>The Start Workflow: Edit screen appears.


The Workflow Name should be pre-populated with <code>Edit: Title</code>. (Title is visible on the Metadata pane of the page. This is what appears in the browser's title bar or on a tab.)</td></tr>
<tr><td>2</td><td>Enter <code>comments</code> describing the changes you have made. While this is an optional step, it is highly recommended as it expedites your workflow approval time.</td><td>
</td></tr>
<tr><td>3</td><td>The due date should default to one week from the current date. Feel free to adjust this date as you see fit.</td><td></td></tr>
<tr><td>4</td><td>Click the Submit button.</td><td>You have started a new Edit Workflow.

</td></tr>
<tr><td colspan="3">Note: At this point, your approver has no idea that a change has been made. You have only saved your changes by creating a workflow. You now have the following options:
- Review your changes
- Continue Editing
- Forward these changes for approval</td></tr>
</table>

Quick Reference Guide

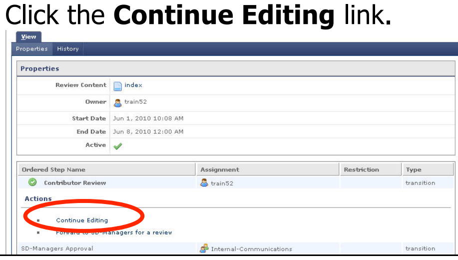
Reviewing your changes

After you have submitted your changes and successfully created your workflow, there appears to be no opportunity for you to view the modified changes (Preview Mode). This section will take you through the necessary steps to view your changes.

Step	Action	Result
1	Click the page icon on the workflow screen.  	A preview of the page displays. 
2	After you have finished viewing your changes, click the `Workflow Name` to return to the workflow.  	

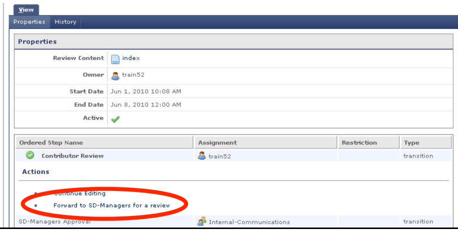
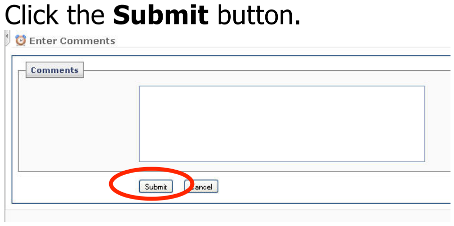
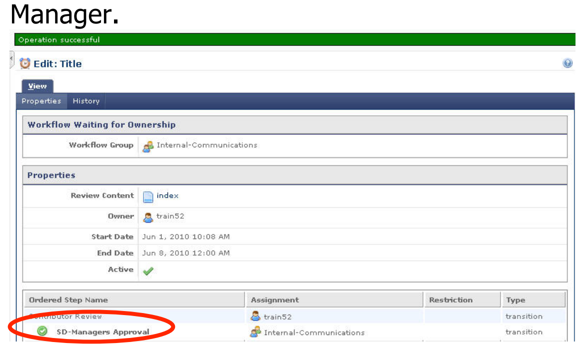
Continue Editing

After creating a new workflow and reviewing your changes, you may have a need to make additional changes before forwarding your page to the managers.

Step	Action	Result
1	In the *Contributor Review* section of the workflow screen, you will see a list of available actions. Click the **Continue Editing** link. 	You are prompted to enter comments. 
2	Remember, comments are optional but adding them expedites the approval process. Click the **Submit** button. 	The Edit screen appears. You may continue editing your webpage.
3	Edit your webpage, scroll down and click the **Submit** button.	You are prompted to enter comments. 
4	Remember, comments are optional but adding them expedites the approval process. Click the **Submit** button. 	You are returned to the Workflow screen where you may opt to continue editing or forward to the manager group. ***Note**: You may also preview your changes.*

Forward to Managers

After reviewing your changes and editing multiple times, you are now ready to submit your changes for approval. Please be mindful that your approvers have no idea that a change has been made until you complete this series of steps.

Step	Action	Result
1	In the *Contributor Review* section of the workflow screen, you will see a list of available actions. Click the **Forward to XX-Managers for a review** link. 	You are prompted to enter comments. 
2	Remember, comments are optional but adding them expedites the approval process. Click the **Submit** button. 	Cascade sends an email to your approver notifying them that a worflow requires action. Additionally, the  symbol indicates that the workflow is now in the hands of the SD-Manager. 
3	You must now await a response from your manager. This response will be in the form of an email informing you that the workflow is complete. ***Note****: When you return to the dashboard, you will see the workflow listed in the Workflow section as well as the path of the page listed in the Locks section. The page is locked because you cannot make any additional changes until the approver reviews those you have previously submitted.*	The approver has the option of doing the following to your changes: - Approve - Reject - Edit and send back to you - Edit and approve

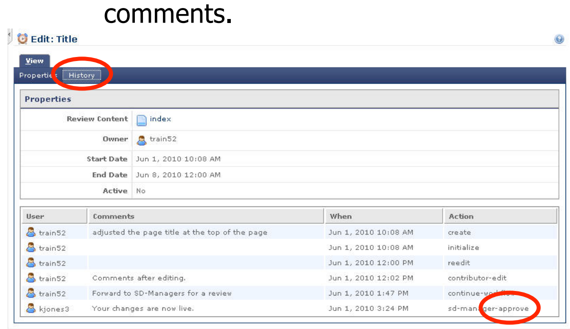
Quick Reference Guide

Workflow Status and Comments

Once your workflow is submitted to the manager your changes may be approved, rejected or even edited and sent back to you for further changes. The following steps will guide you through the possible workflow outcomes. **This information will not always be listed in the email.**

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>Approve
Your workflow has been approved.</td><td>

You will receive an email notifying you that attention is needed on a workflow.
Open the email and click on the link to view your workflow.
Log into Cascade. You will be taken directly to the dashboard.
You will see a new message in the Messages section.
Click on this link to open the Workflow Complete message.
Within the message will be a link that reads 'click here'. Click the link. You will be taken to the workflow screen.
Click the History button to view all comments.



Note: You will also notice in the final line of the Action column that the final word is 'approve'.</td></tr>
<tr><td>2</td><td>Reject
Your workflow has been rejected.</td><td>Follow steps 1 – 7 above and be sure to read the comments on the History pane. This will provide information regarding why your workflow was rejected.

In this case the final line will read 'delete'.</td></tr>
</table>

3	**Edit and/or Return** On a rare occasion your approver may opt to make changes to your page and return it to you (or simply return it to you) for additional editing.	1. You will receive an email notifying you that the workflow requires attention. 2. Open the email and click on the link to view your workflow. 3. Log into Cascade. You will be taken directly to the dashboard. 4. Click on the link representing your workflow. 5. Click the **History** button to view the comments. 6. Return to the workflow by clicking the **Properties** button. 7. Select the **Continue Editing** link in the *Actions* section. 8. When you have completed your edits, click the **Submit** button and enter comments where appropriate. 9. Forward this group of changes to your approver by clicking the **Forward to XX-Manager** link.
	Edit and approve The manager may opt to make subtle changes to your page and approving the page. In these cases you will be notified of the specific changes via the comments.	Follow the instructions from the *Approve* section.

Quick Reference Guide

Troubleshooting

Problem: I received an email stating that action needed to be taken and that my workflow is overdue.

You have created the workflow, but did not forward it to your approver.

1. Go to the Dashboard in Cascade and check the Workflow section. You will see your workflow listed.
2. Click the link for your workflow.
3. Click the '*Forward to XX-Manager*' link, enter comments and click the **Submit** button.

Problem: I know I submitted my workflow, but the changes are not live yet.

Be certain that you have submitted your workflow *to the approver* by following Step 1 above. Your workflow section should be empty. Check your messages area for a Workflow Complete message. If one exists, do the following:

1. Click to open the message
2. Click on the link in the body of the message that reads '*click here*'.
3. Click the '**History'** button (under the view tab).
4. If the last action ends in 'delete' or 'reject', your edit was not approved. You may want to contact your approver for more information. Typically this information is provided in the comments, which are visible within this window.
5. If the last action ends in 'approve', contact your approver for more information.

Problem: I don't know if my approver received my workflow.

While in the Workflow screen, you will see a white checkmark with a green background. If you have successfully submitted your workflow, this symbol will be to the left of 'XX-Manager-Approval'.

If this symbol is to the left of Contributor-Edit, you must select the 'Forward to XX-Manager' option so that your request can be approved.

Problem: I have logged out of Cascade, how do I return to my workflow?

Option 1: Log into Cascade and click the Workflow link from the Dashboard.
Option 2: Up creating the workflow, you should have received an email. Click the 'View the workflow' link from your email.