

CASCADE CMS

Workflow Reference Guide

WHAT IS WORKFLOW



Workflow is a feature that has been adopted by some campus units. Workflows are a series of steps that content must go through before it can be created, edited, copied, moved, renamed, deleted and/or published by contributor groups in Cascade CMS. Many of the Arts & Science department web sites utilize workflow to ensure that consistent department information is presented to the public.

Our most common workflows are being used for content editing and deletion.

Edit workflows are started **after you have completed all your page edits.**

Starting a Workflow

Edit your page as usual. After you have completed all your edits:

1. Select **Preview Draft** then click **Submit**.
2. enter any **version comments** you may want to add about the changes you have made.
3. Select either the **Start Workflow** or the **Check Content & Start Workflow** button.

This brings you to the workflow screen. Select the **Back to Page** arrow if you are not ready to start the workflow.

Completing a workflow

Enter the following information:

- Your **Workflow Name** will be made from the workflow type (Edit Page or Delete Page) followed by your page title. If needed, you can optionally replace this Workflow name.
- **Workflow Instructions/notes** - Enter any instructions or note about the changes you have made. While this is an optional step, it is highly recommended as it expedites your workflow approval time.
- **Version Comments** - Also optional, this is another chance to enter any **version comments** you may want to add about the changes you have made.
- **Due Date** - The due date should default to one month from the current date. Feel free to adjust this date as you see fit.
- Start Workflow by selecting the **Start Workflow** button (upper right on the workflow screen).

Once your workflow is started, an email is sent to notify your publisher of your changes. Your publisher may choose to make further edits to your page and/or either approve, reject or return the workflow back to you for further changes. Follow [workflow editing and actions](#) below to guide you through the possible workflow outcomes.

The bottom of the workflow screen will display the steps of the workflow and the group or user assigned to each step.

Once submitted, the workflow status screen is displayed. Here you can see the history of the workflow along with its Status, the **Asset in the workflow**, who **Initiated** it and the **date and time** the workflow was started.

Workflow Editing and Actions

Once your publisher has reviewed your changes they may choose to make further edits to your page and/or either approve, reject or return the workflow back to you for further changes. Your workflow actions are:

- **Approved** - You will receive an email from Cascade CMS notifying you that your workflow was approved, and your changes have been published.
- **Returned** - You will receive an email notifying you that attention is needed on a workflow. Your next steps are to:
 1. **Open your workflow** and review the history to see the comments entered by your publisher.
 2. Select the **Edit** from the Available Actions to edit the page and continue to make changes.
 3. After additional changes have been made, you can send the workflow back to your publisher for approval by selecting **Advance**.
 4. Enter comments.
 5. Select the **Advance workflow** button to send the workflow back to your publisher.
- **Rejected** - You will receive an email notifying you that attention is needed on your workflow. Your next steps are to:
 1. **Open your workflow** and review the history to see the comments entered by your publisher and what changes caused your page to be rejected. Your changed will be removed from the page.
 2. You will have to edit the page to start the workflow process again if necessary.

Receiving Notifications

You can be notified of workflows waiting for you by email and in the **My Workflows** dashboard widget.

Dashboard Widget

The **My Workflows** widget displays a list of workflows started by you and active workflows that are waiting for your action. Recently visited workflows will be displayed in the **My Content** widget under **Recent**. Workflows are automatically removed once they are advanced and/or reassigned.

When a workflow requires your attention, you will see the word "**Waiting**" beside the name in the My Workflows widget.

Selecting a workflow from the **My Content** or **My Workflows** dashboard widget will take you to the status screen. Here you can see the history of the workflow along with its Status, the Asset in the workflow, who Initiated it and the date and time the workflow was started.

Any available actions needed can be found within the **History** of the workflow in the **Available Actions**

Email

You can receive an email from **Cascade CMS** <noreply@cascaedcms.com> noting the workflow title, history, and a link to view the workflow.