Using Workflow Builder

How to Use the Workflow Builder

**Workflow builder** is a graphical way to create custom workflows without using the more complex markup language.

Workflows are scripted using macro notation, which is stored in a template.

```macro
{workflow:name=Simple Workflow}
  {description}Simple three state workflow{description}
  {state:Todo|submit=In Progress}
  {state}
  {state:In Progress|submit=Completed}
  {state}
  {state:Completed|submit=Todo}
  {state}
{workflow}
```

But working with this notation is not always simple, unless you are an advanced and experienced user.

Related pages

- Access workflow builder
- Edit states using workflow builder
- Edit the workflow using workflow builder
- Markup Editor in workflow builder
- Save as template

It is also an easier way to understand and communicate the document life-cycles within your organization, or when starting a new project with a customer or stakeholder.

### How to Use the Workflow Builder

Depending on the workflow scope i.e., global, space or page, you need different permissions to use workflow builder i.e., global admin, space admin or any page edit permission if page mode is enabled (see **Page vs. Space Mode**).

Workflow builder can be accessed for a workflow in:

- the space workflows Document Management dashboard in space tools
- the global workflows template dashboard in global administration

If page mode is enabled then it can also be accessed on a page:
• when adding and customizing a page workflow.
• via the Edit with workflow builder option in the page action menu on a page with a page workflow added and applied.

The most common method of accessing workflow builder is through the space administration menu. To use the workflow builder for space workflows, first ensure you have space admin privileges, then:

• go to the space tools Document Management Dashboard in the space.
• choose the ellipsis menu for a workflow.
• choose Edit to open workflow builder.

The details of the workflow are displayed as a visual flow diagram.
These two main panel sections of workflow builder are:

- **Workflow Navigator** (right side). Contains the workflow diagram and links to create or update the different elements of your workflow (e.g., workflow, states, parameters).

- **Workflow Panel** (left side). This panel is contextual, so you will see one of two different views depending on what the task you’re performing. You will either see:

<table>
<thead>
<tr>
<th>Workflow Panel - workflow view</th>
<th>Workflow Panel - state view</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Simple Approval Workflow</strong></td>
<td><img src="image" alt="Workflow state view" /></td>
</tr>
<tr>
<td>Page Workflow</td>
<td>Review Simple Approval Workflow</td>
</tr>
</tbody>
</table>

**Workflow view** is displayed if you click anywhere in the workflow navigator in the white space background beside the state lozenges.

**State view** is shown if you click on any of the state lozenges in the workflow navigator or the state icons in the workflow panel.

- You can drag and drop state names in this panel to **re-order the states** in the workflow. Any change will be reflected in the visual workflow in the navigator panel.

- Choose the workflow name to **edit the overall workflow** - workflow name, description, type of content to be applied to, add trigger markup or manage display of workflow popup progress tracker.

- **Edit page layout, workflow parameters or workflow read confirmation for the final state** by choosing the appropriate icon/name.

- **Choose the state name to edit the state** name, description, status color, make the state a final state, add a due date or allow users to manually add tasks when in the state.

- **Edit or add transitions, approvals or tasks** to be added by the workflow by choosing the appropriate icon/name.
For the state you want to view or edit, select the state lozenge in the right hand workflows navigator, and the left side panel will display the state information (such as name and description).

**Edit the workflow details**

Edit the workflow details by clicking on the top workflow panel area, where the details are, or by clicking on the Workflow button on the top of the Workflow Navigator panel.

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This panel allows the visual editing of the workflow macro including workflow description, content filter labels and content type filters.

You can also choose some settings for the workflow popup display on the content. Workflow triggers can be added in this panel but can only be added using markup.

**Triggers**

The current version of the Workflow Builder only accepts triggers by using the wiki markup.

Open the advanced section when editing the workflow details, and add your wiki markup there.
Any triggers in the workflow are seen as **Rules** in the workflow panel.

Open **Rules** to see a simple overview of each trigger.
For details of how to create triggers for the workflow please refer to the trigger macro.

Edit page layout

When in the workflow view you will see Page Layout with a number beside it, which indicates how many elements are already set.

These set elements might include:

- Workflow Instructions
- Page Header
- Page Footer

Click on any of these elements to add, edit or remove.
Page Header
Display a custom page header on each content using the Workflow Simple Approval Workflow

Visibility
- All

Content *
- Project Lead Manager Sunil Conn

Apply  Delete  Cancel

Workflow Instructions
Display a message explaining users how to use the Workflow Basic Approval

Type
- Info

Title
- Follow this Instructions

Content *
- Approve or reject the In Progress state

Apply  Delete  Cancel
The visibility for the page header and page footer can be set according to different user permissions for the content:

- all users who can either view or edit the content
- read-only access users
- contributors (edit and admin permissions)

The panels allow editing of the parameters for the following workflow macros:

- workflow-instructions macro
- pageheader macro
- pagefooter macro

**Edit workflow states**

When in the state view (by clicking in any state in the Workflow Navigator), you will see in the Workflow Panel the state information, which includes things like due date, approvals, tasks and transitions. You can edit the state details by clicking on the top Workflow Panel area where the state details are, or by clicking on the State button at the top of the Workflow Navigator.

State view: The Workflow Panel (i.e., left side menu) changes when a state is selected (In progress is selected), to display the state contextual menu

Workflow builder allows the customization of all the state macro parameters: name, state indicator circle and lozenge color, description, due date and other advanced attributes and parameters:
Workflow builder in this panel is editing details for each individual state macro in the workflow.

Reorder the workflow states

Reordering the states of your workflow is now easier than ever. When in the state view you can see a list of the existing states in the left hand Workflow Panel.

Just drag and drop a state to a lower or higher position, and you will see how the diagram changes to reflect the new order.
Workflow builder will not allow you to drag and drop a state to be the first state in the workflow. The current first state cannot be dragged and dropped to another position in the workflow.

To move a state to be the first state in the workflow you must use the markup editor and copy and paste the state markup to be the first state macro in the workflow.

For example:

- add a new state **Todo** for pending activity using workflow builder.

- choose the `{ }` markup editor icon

- Locate the **Todo** state macro markup and cut and paste the markup to position it before the current opening state macro for the **In Progress** state.
• choose **Save**.

• choose the workflow builder icon to return to workflow builder.

The **Todo** state is now the first state in the workflow.

**Approvals**

When in the state view, the number of transitions, approvals and tasks are listed for the state.
View a list of any existing approvals by clicking on Approvals in the state panel area.

Any existing approvals are displayed by name and appended with an approval icon.

<table>
<thead>
<tr>
<th>Approval Icon</th>
<th>Indicates ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Checkmark]</td>
<td>Anyone can approve.</td>
</tr>
<tr>
<td>![Checkmark]</td>
<td>Reviewer(s) can be assigned.</td>
</tr>
<tr>
<td>![Lock]</td>
<td>Credentials required for a reviewer.</td>
</tr>
<tr>
<td>![People]</td>
<td>Reviewer(s) are preassigned.</td>
</tr>
</tbody>
</table>
Add or edit an approval

To add a new approval to the current state, click **Add Approval** OR choose an existing named approval to edit.

Setting reviewers for an approval

Reviewers for an approval can be set in one of three ways in the Add Approval or Edit Approval panel in workflow builder.

The options are different for each Reviewers option button.

Reviewers - Anyone can approve

- Anyone can approve (no restrictions)
- Limit who can approve and/or assign
- Set all reviewers that have to approve

Minimum reviewers

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Set minimum number of reviewers required for the content review to be approved.

In this option the approval can be configured so that a minimum number of reviewers must undertake the content review and agree for a transition to occur.
Reviewers - Limit who can approve and/or assign

**Reviewers**
- Anyone can approve (no restrictions)
- Limit who can approve and/or assign
- Set all reviewers that have to approve

**Assignable reviewers**
- Users cannot be assigned through UI
- Users can be assigned through UI
- Users must be assigned to approve
- Only one user must be assigned to approve

This option will allow reviewers to be assigned. Choosing each of the Assignable Reviewers buttons will display further options for each option.

Reviewers - Set all reviewers that have to approve

**Reviewers**
- Anyone can approve (no restrictions)
- Limit who can approve and/or assign
- Set all reviewers that have to approve

**Automatically assign users**

A comma-separated list of usernames (ref. user= &)

**Automatically assign groups**

Enter group names

A comma-separated list of groups (ref. group= &)

At least one user needs to be added to be automatically assigned for this Reviewers option to be added to the approval.

All the Reviewers options can also be configured in the Advanced settings for the approval.
Each approval can be set

- to require credentials for a reviewer
- to have a condition for the approval to become active
- to allow roles to be added for reviewers.

Approvals can also be reordered just by dragging and dropping to a higher or lower position.

The order of the approvals will be the initial order they are displayed in the workflow popup on the page before any approvals are undertaken when no conditions are set for any of the approvals.

Further details of content reviews (approvals) can be found in the approval macro pages.

Tasks

In the state view you can edit the existing tasks by clicking on the listed tasks in the Workflow Panel area. To add a new task, click on the + Task button on the top of the Workflow Navigator.
Tasks can also be reordered just by dragging and dropping to a higher or lower position.

Workflow builder uses the `task macro` to create and set the behaviour of workflow tasks.

**Transitions**

When in the state view you can edit the existing transitions by clicking on the listed transitions in the Workflow Panel area, or add a new one by clicking on the `+ Transition` button on the top of the Workflow Navigator.
The details of the markup and macros used can be found in the documentation transitions pages.

Parameters

When in the workflow view you can edit the existing parameters or add a new one by clicking on the + Parameter button on the top of the Workflow Navigator.
This feature uses the `workflowparameter` macro - an example of a type of value reference that can be used in workflows.

**Workflow Read Confirmation**

A read confirmation can be enabled in a workflow using workflow builder (or markup editor).

The Workflows Builder can be used to add a read confirmation to any workflow for the final state.

**Note:** read confirmation will only be available for the final state in the workflow.

**Editing the Read Confirmation**

Clicking the read confirmation link will bring up the configuration options, including:

- users assigned to read/confirm the page,
- user groups assigned to read/confirm the page,
- a due date indicating when read confirmation should occur by.
• allow a reviewer to decide to enable or disable the read confirmation on the approved transition to the final state.

**Edit Read Confirmation**

Edit a read confirmation request from the state

Users

[ Elle Brakus ] [ Suni Conn ] add more people...

Enter a comma separated list user names

Groups

[ project_leads ] add more people...

Enter a comma separated list group names

Due Date

| P5W | ISO_8601 |

Valid formats: durations (ISO_8601 e.g. P20D), dates (YYYY-MM-DD HH:mm) or value references

- Users will be able to change and remove the date
- At final review, let reviewer decide if read confirmations should be assigned.
  If unticked, read confirmations will be assigned every time the workflow enters the final state.

[ Apply ] [ Disable ] [ Cancel ]

Read confirmations use the `read-ack` macro.

**Not supported**

- Graphical trigger creation.
- The `{comment macro}` is deprecated. Please use the description field of other macros to include extra contextual information.

**Authoring using workflow builder**

- Access workflow builder
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- Save as template