Edit states using workflow builder

Overview

Workflow states are listed in the workflow panel.

A state can be added, removed and edited using workflow builder.

Transitions, approvals and tasks can be added, edited and removed for each state. The state indicator color can be customized.

You can set state attributes

- allow users to add tasks to the page
- expire on a due date using a duration time or a fixed date

The state can also be set as the final state for the content.

Inspect a state using workflow builder

Choose a state lozenge in the Navigator panel visual flowchart will display the state name and description for the chosen state in the left-hand workflow panel.
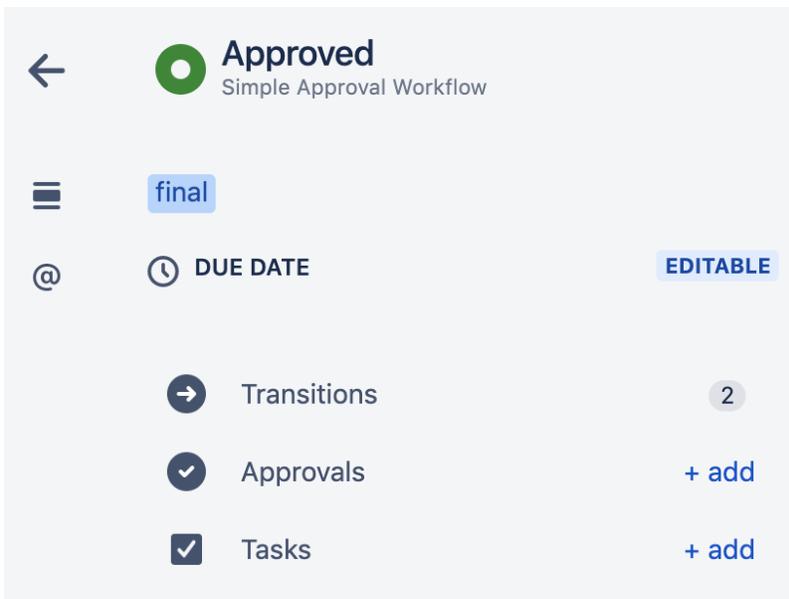
Related Pages

Edit states in workflow builder

- Edit approvals using workflow builder
- Edit tasks using workflow builder
- Edit state parameters using workflow builder

User Guide

- Status Indicator Circles
- Switch between draft and published states
- State expiry date

Workflow Authoring Guide

- States
- Transitions
- Approvals (Reviews)
- Tasks

This displays (as applicable to the state):

- **state parameters** – details of any notable parameters (if present for the state), such as `taskable`, `final` or `hidefrompath`– see: `{state` `} macro`
- **state expiry** or **due date** for the state.

This state panel also displays the number of state approvals, transitions and tasks.
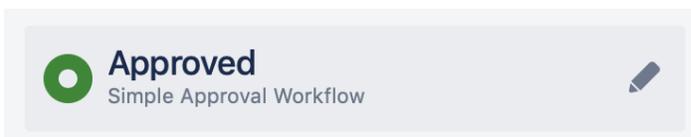
You can

- choose each one to view and edit existing individual named approvals, the transitions or state tasks
- create a new approval, transition or task by choosing **+add** (or choose the number if present)

You can also add transitions, approvals and states by choosing the appropriate button in the navigator panel

State editor

Choose the state name

This opens the state editor

⊙ Edit a state

Edit a state from the Workflow *Simple Approval Workflow*

←

Name *

Approved

Colour

Description

State description

🕐 **DUE DATE**

| | Day(s) | Period |

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

☑ Users will be able to change and remove the date

ATTRIBUTES

☐ Taskable

The users can define tasks

☑ Final

Represents the final version of the content

> **ADVANCED**

| Apply | Delete | Cancel |

In the state editor you can

- edit the state name (state names are case sensitive)
- edit or add a description of the state - usually the state names some detail of its use and features
- customize the state color choosing from a dropdown palette or by the addition of an hexadecimal color

There are reserved characters that cannot be used in a state name.

State content due date

A due date can be set for the state in the state editor

DUE DATE

	Day(s) ⌄	Period ⌄

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

☑ Users will be able to change and remove the date

This can be a time period starting on transition into the state or on a set date.

Period ⌄

Period
Enter time unit and amount

Fixed Date
Pick a date from the calendar

ISO_8601
Enter formatted duration string

Value Reference
Enter a reference to another value

Set the duration for the due date using one of the dropdown options

- **Period** - set a value for a time period in one of the following time units - years/months/days/hours/minutes/seconds
- **ISO 8061** - time period set in a valid ISO 8061 format e.g. **P1Y6M** for 18 months, **P1DT12H30M** for 1 day, 12 hours and 30 minutes
- **Value reference** - for example the value of a workflow parameter

A **fixed date** can be set using the popup calendar.

DUE DATE

2/18/1993 📅	Fixed Date ⌄

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

☑ Users will be able to change and remove the date

Ticking the checkbox allows users to edit or remove due date. Note that the due date is reset on each transition in the state.

State attributes

In the state editor you can change the behavior of the state and the workflow popup on the page in the state.

ATTRIBUTES

☑ Taskable

The users can define tasks

☑ Final

Represents the final version of the content

- **Taskable** - enable users to manually add tasks in the state using the page tools menu
- **Final** - defines the current state as the final (published) state in the workflow.

Only one state in a workflow can be defined as the final state. Choosing **Final** in a state will automatically uncheck **FInal** in any existing states.

State attributes can also be set using the options in **>Advanced**

⌄ **ADVANCED**

☑ Hide from path

Hidden from the workflow progress tracker

☑ Hide selection

Only admin users can select the next state

☑ Version completed

Compatible with K15t's Scroll Versions app

The workflow popup behavior for the state can be amended by ticking the checkboxes

- **Hide from path** - removes the state from the workflow popup progress tracker when the content is in each of other states in the workflow
- **Hide selection** - removes all transition options from the workflow popup when content is in the current state *except for admin users*

Check **Version completed** will remove the **Final** attribute from the state and add a **K15T Scroll Versions app** compatible attribute to the state. Use this if you are using Comala Document Management with K15Ts Scroll Versions app.

State approvals, transitions and tasks

The state panel also includes the number of each of the following in the state:

- **Approvals** – the number of any content reviews defined by `{approval}` macros
- **Transitions** – the number transitions from the selected state to other states
- **Tasks** - the number of tasks that will be added by the workflow on the transition into the state
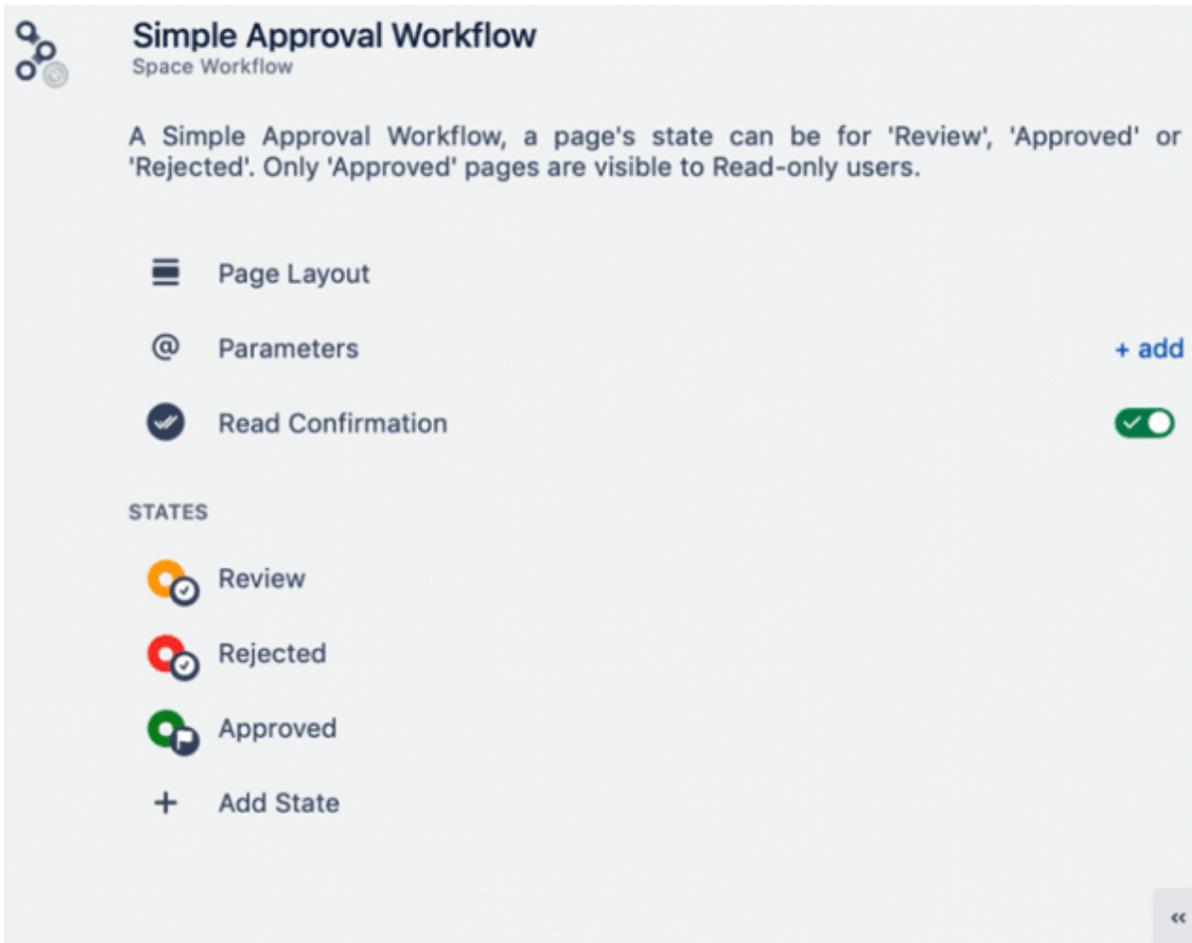
You can select each of these to list the names of any existing approvals, tasks or transitions or add new ones by choosing **+add**.
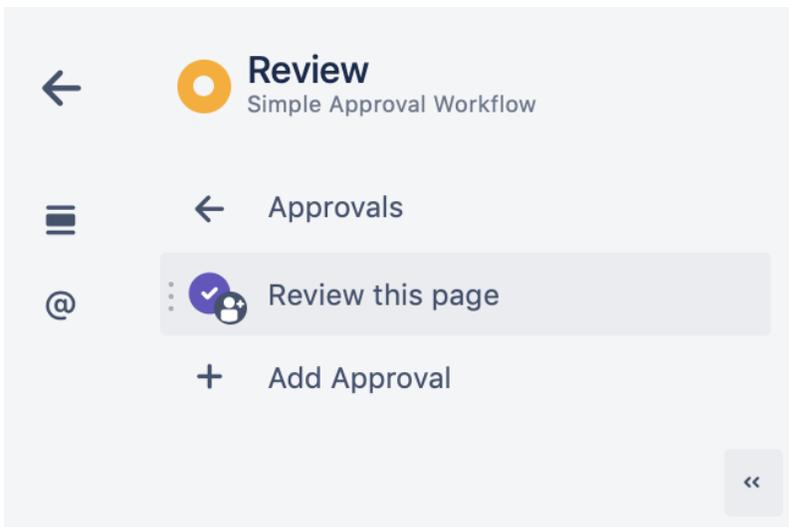
Choosing the component name opens the appropriate editor for each individual named component - approval, transitions or tasks.

Add a new workflow state

One or more states can be added by choosing **+Add State**.

Enter the new state name and optionally add

- a state description
- state expiry or due date and if required check the box to allow users to edit the date
- state indicator color using either the color palette menu or a hexadecimal color

States can be dragged and dropped in the workflow panel to change the order displayed in the workflow popup progress tracker bar.

Changes made to the order of the states will be reflected in the visual workflow diagram in workflow builder and markup notation in the markup editor but will not change any state transitions.

For any changes, ensure that you:

- Choose **Add** in the state editor to confirm the changes for the state
- Choose **Save** in the navigator panel to add these changes to the workflow
- Select **Exit** in the Navigator panel to add the updated workflow to the content

Ensure that your state name does not include any prohibited characters.

See also

Using Workflow Builder

- Access workflow builder
- Edit the workflow
- Edit page layout
- Edit workflow parameters
- Markup editor in workflow builder
- Save as template

Workflow Authoring Guide

- Getting Started
- Concepts
- Macros
- Using Workflow Builder
- Reserved Characters

Administration Guides

- Page vs. Space Mode