




Access workflow builder

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Access workflow builder

Workflow builder can be accessed in three ways, depending on where the workflow is stored

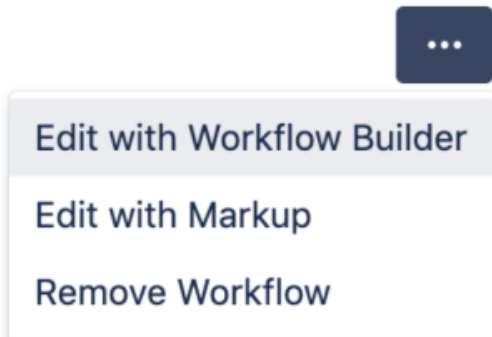
Workflow	Icon	Workflow builder accessed through
Page workflow		Page Tools Menu if global configuration is <i>Page Workflows Allowed</i> in the space and a page workflow has been added to the content.
Space workflow		Space settings Space Workflows dashboard (space admins only)
Global workflow		Global workflows dashboard (global admins only)

Note: in space settings Document Control dashboard [Page Workflows Templates](#) screen (space admins only) the **Edit** option for a page workflow accesses the markup editor and not workflow builder.

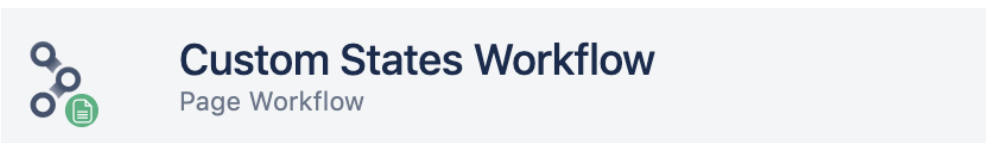
Page level

When a workflow is added and applied as a page workflow access workflow builder using the page tools menu.

Choose [Page Tools](#) [Edit with workflow builder](#)



In workflow builder the workflow name is appended with the page level of the workflow template and a page-level workflow icon.



Note: this requires [page mode](#) to be active for a space.

Using Workflow Builder

- Access workflow builder
- Workflow panel in workflow builder
- Edit the workflow using workflow builder
- Edit page layout using workflow builder
- Edit workflow parameters using workflow builder
- Enable and edit read confirmation using workflow builder
- Edit states using workflow builder
- Markup editor in workflow builder
- Save as template

Space level

Choose **Edit** from the **ellipsis menu** on any template shown on [Document Management - space tools](#) or [page workflows - space tools](#).

[Document Management](#) Configuration Parameters Notifications Import Clear History Audit Log

Document Management Dashboard

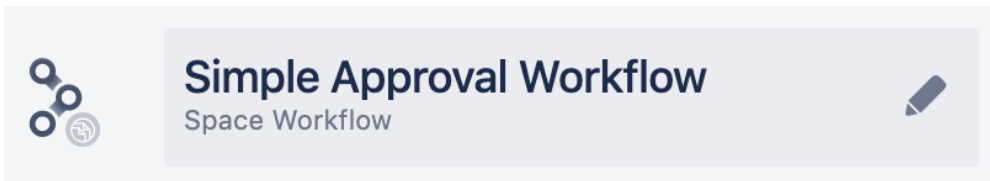
List Space Workflows ▾ List of Workflows that apply to all pages and blog posts in Documentation Management.

Active	Workflow name	Scope	
<input checked="" type="checkbox"/>	Simple Approval Workflow	Space	

+ Add Workflow Global Workflows Template

- Edit
- Initialize states
- Copy
- Remove

In workflow builder the workflow name is appended with the space level of the workflow template and a space level workflow icon.



Page workflows can also be edited in the Document Management space tools dashboard.

- choose **Page Workflows Templates** from the **List** dropdown menu
- choose **Edit**

[Document Management](#) Configuration Parameters Notifications Import Clear History Audit Log

Document Management Dashboard

List Page Workflow Templates ▾ These are the Workflow templates that can be applied to a specific page.

Active	Workflow name	Scope	
<input checked="" type="checkbox"/>	Simple Read Confirmation	Space	

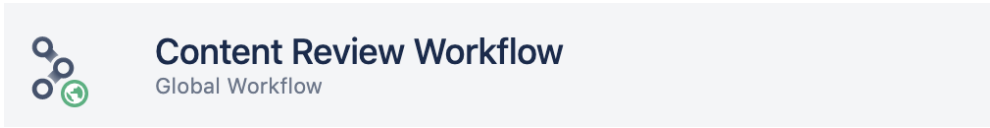
- Edit
- Remove

The space tools dashboard **Edit** option for the page workflow only gives access to the markup editor. Workflow builder for page workflows is only accessible by adding a page workflow to content and using the [Page Tools menu](#) on the page.

Global level

Global administrators can use workflow builder to inspect and edit global workflow templates.

Choose **Edit** from the **ellipsis menu** on any template that is shown on [Document Management Configuration - Global Workflows](#).




In workflow builder the workflow name is appended with the global level of the workflow template and a global level workflow icon.

Global Workflow Templates

You can define Workflow Templates - templates for sequences of states, approvals, tasks and custom triggers - that can be linked directly to other space or copied and used as a starting point by a space administrator.

There are **34 pages** with active workflows across **4 spaces**.

Active	Workflow name	Space Categories	Linked
<input checked="" type="checkbox"/>	Content Review Workflow	None	
<input checked="" type="checkbox"/>	Content Expiry Workflow	None	 Edit
<input checked="" type="checkbox"/>	Quality Management System Workflow	None	 Copy
<input checked="" type="checkbox"/>			 Remove

See also

Using Workflow Builder:

- [Access workflow builder](#)
- [Workflow panel in workflow builder](#)
- [Edit the workflow using workflow builder](#)
- [Edit page layout using workflow builder](#)
- [Edit workflow parameters using workflow builder](#)
- [Enable and edit read confirmation using workflow builder](#)
- [Edit states using workflow builder](#)
- [Markup editor in workflow builder](#)
- [Save as template](#)

Workflow Authoring Guide:

- [Getting Started](#)
- [Concepts](#)
- [Macros](#)
- [Using Workflow Builder](#)

Administration Guides:

- [Page vs. Space Mode](#)