

# Save as template

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## Overview

Workflow builder gives you the option to save a workflow as a new template.

- page workflows can be saved as either a space template or a global template
- space workflows can be saved as a global template

At space and global level, workflows can also be

- created and saved as a new template
- copied, edited and saved as a new template

## 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](#)

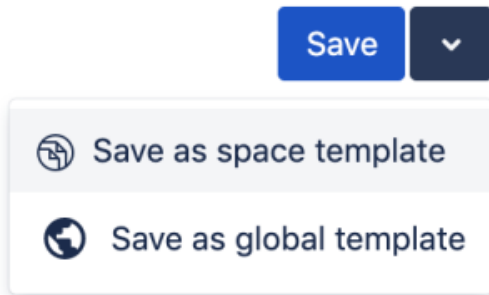
## Saving a page level workflow

In workflow builder a page workflow can be saved as either a space workflow or a global workflow.

In [page mode](#), saving a workflow template requires you to have at least [space admin](#) permission.

### Save a page workflow as a new space workflow template

In the Navigation panel in workflow builder choose the down arrow (next to **Save**):



Add or amend the name for your new space workflow template and choose **Save**.

## Save as space template

Save this workflow as a space template

Name for the template

Save

Cancel

The new template is saved to the Document Management space tools dashboard.

# Space Tools

Overview Permissions Content Tools Look and Feel Integrations Document Management Tasks

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"/>	My simple approval workflow <span>project</span>	Space

[+ Add Workflow](#) [Global Workflows Template](#)

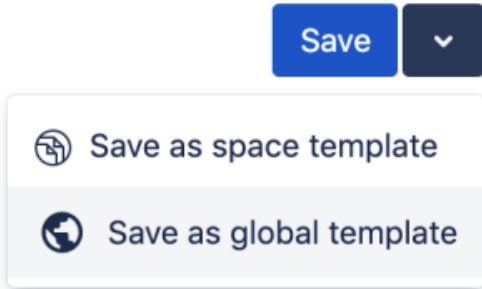
- Edit
- Initialize states
- Copy
- Remove

The template can be edited further in the space using workflow builder. It can also be copied and edited.

### Save a page workflow as a new global template

A user will need global administrator permission. Global administrator password will be required.

In the Navigation panel in workflow builder choose the down arrow (next to **Save**):



Add or amend the name for your new global workflow template and choose **Save**.

### Save as global template

Save this workflow as a global template

Name for the template

[Save](#) [Cancel](#)

The new template is saved to the Document Management global workflows dashboard.

## 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 spaces or copied and used as a starting point by a space administrator.

There are **35 pages** with active workflows across **4 spaces**.

Active	Workflow name	Space Categories	Linked
<input checked="" type="checkbox"/>	My global team approval workflow <code>teamproject</code>	None	

The template can be edited further as a global template using workflow builder. It can also be copied and edited.

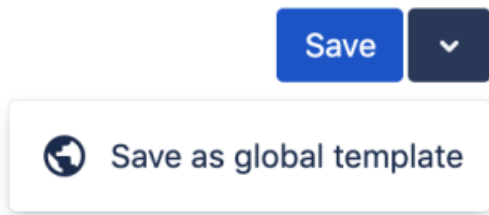
## Saving a space level workflow

In workflow builder, a space workflow can be saved as a global workflow.

Saving a workflow as a global template requires you to have global admin permission.

## Save as a new global template

In the Navigation panel in workflow builder choose the down arrow (next to **Save**):



The global administrator password will be required.

If required, a space admin can simply copy and edit an existing space workflow to create a new space template.

## See also

### User Guide:

- [Access workflow builder](#)
- [Edit the workflow 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](#)