

# Lesson 1 - Templates



## Overview

### Concept: Templates

Before we can do anything, we need somewhere to build our workflow – a **workflow template**. That's the dashed box in the diagram above – it will contain our simple content production process.

All workflows are stored in workflow templates, and a workflow template can only contain one workflow. Because of this, we generally refer to a "workflow template" as just a "workflow".

## Create a page

Go to your personal space (or some other space where you can create content), and **Create** a blank page.

It doesn't matter what you call the page, or what's in it. It's just somewhere for us to build our workflow.

## Space vs. Page mode

Before we continue, you need to know about the two modes the Comala Document Management app provides at the space level.

One of them is called **Page Mode**, and it allows every page in the space to have its own unique workflow. It's great for developing workflows, but it makes managing workflows harder because every page has a separate copy of the workflow.

The other mode is called **Space Mode**, and it allows you to apply centrally managed workflows to the entire space – all pages and blog posts – although you can filter by label or content type if required.

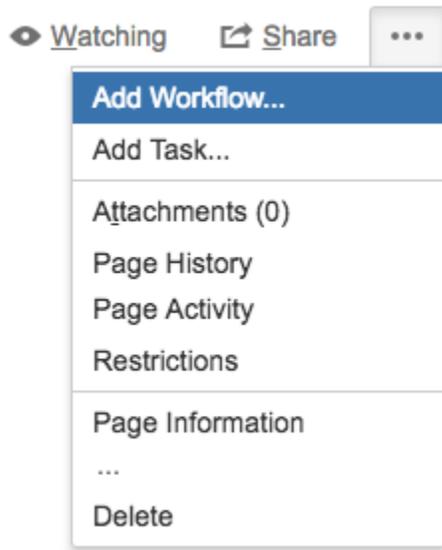
If you want to see a side-by-side comparison, see: [Page vs. Space Mode](#)

For now, we'll use Page Mode, as it's a bit easier to get started that way.

## Add workflow

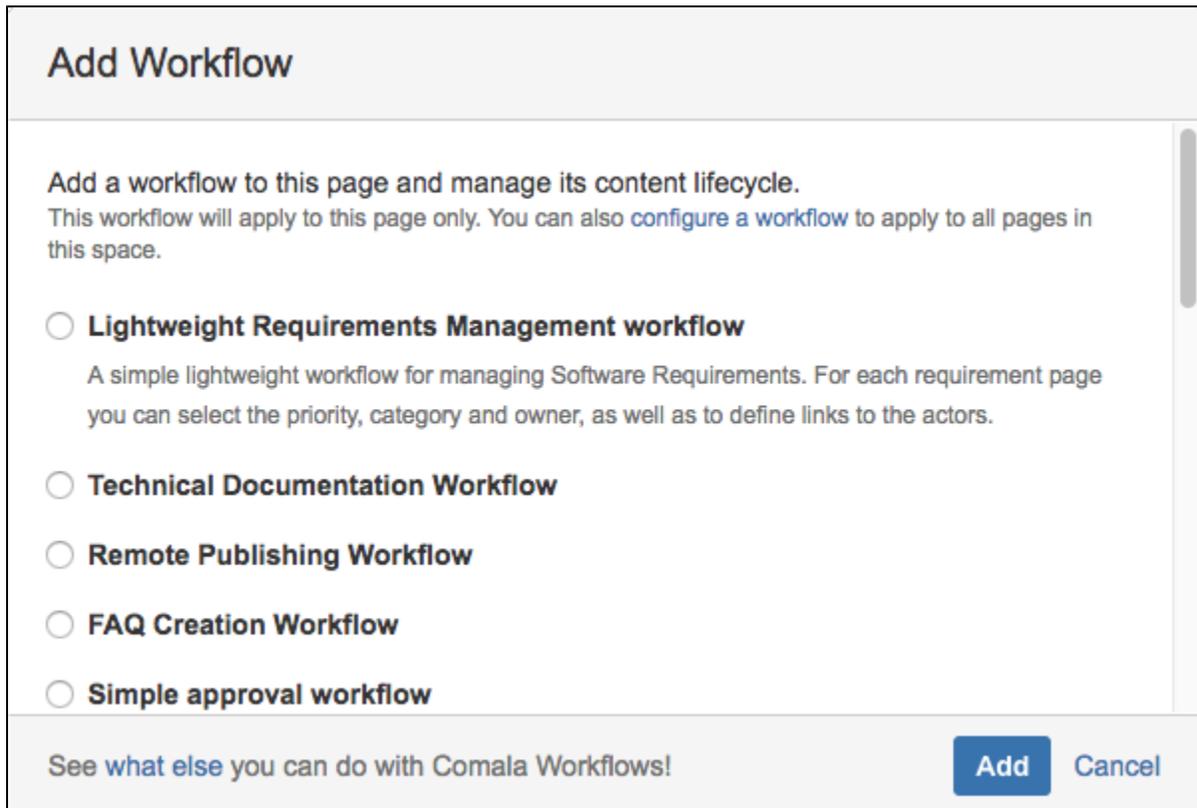
In Page Mode, the process of creating a workflow is to simply add one to a page. Here's how...

From the [Page Tools Menu](#), choose **Add Workflow...**



Note: If you don't see that option, make sure the space is running in [Page Mode](#).

You'll now see the **Add Workflow** dialog, like this:



You'll see a list of existing workflows that you can apply – if you were to choose one of those (*don't, we're going to do something else*) it would make a completely new copy of that workflow on your page. If the original workflow was changed, it wouldn't affect the copy of it on your page.

## Custom states workflow

There's a special workflow in that list called **Workflow with custom states**. Scroll right to the bottom of the list and choose it:

## Add Workflow

**FAQ**

**Scroll Versions documentation workflow**  
This three state workflow can be used together with the Scroll Versions add-on. It contains a Draft, In Review and Completed state. The Completed state will match up with the Scroll Versions completed documentation state when integration with that add-on is enabled.

**Workflow with custom states**  
A workflow with the states you want to start with. You will be able to make further changes later.

Define the states of the workflow with a comma separated list

[See what else you can do with Comala Workflows!](#)

This is where most workflows are born. When you choose the **Workflow with custom states**, a text box appears with some default states.

Let's use those for now, we can change them later – choose the **Add** button.

## Test it

Head over to the [User Guide](#) and familiarise yourself with the following:

- [Workflow Status Bar](#)
- [Workflow Popup](#)
  - [Select a state](#)
  - [Progress tracker](#)
- [Tasks Popup](#)

After you've done that, we'll continue with the second lesson:

[Lesson 2 - States ›](#)