

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](#)

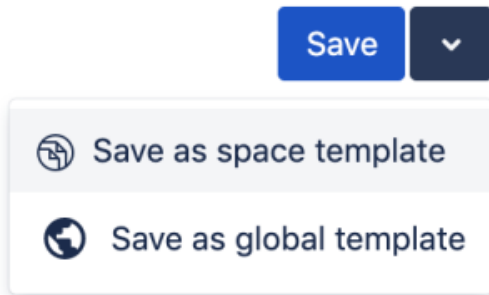
Saving a page level workflow

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 project	Space

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

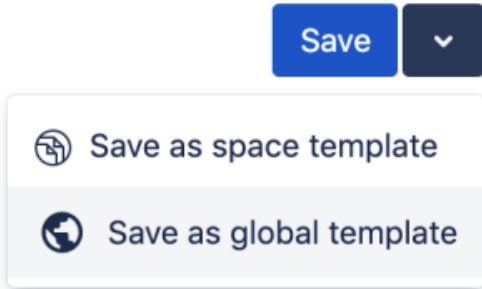
- Edit
- Initialize states
- Copy
- Remove

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.

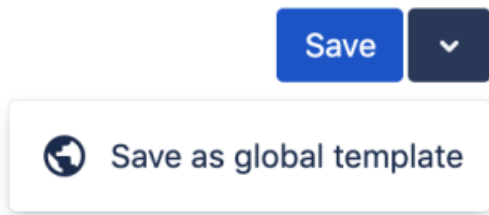
Saving a space level workflow

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](#)