

Workflow

Workflow in Titan CMS is a way to have others contribute to the content while still having the ability to review before the content is published to the live sites. There are several variations of workflow available to you.

For most businesses, a 1- or 2-step workflow is recommended.

- *No Workflow* – Clicking on Save and Publish mean the same thing. The update will go live on the site immediately.
- *1-Step Workflow* – Clicking on Save will save your work in progress. Clicking Publish will push the changes live on the site immediately.
- *2-Step Workflow* – Clicking on Publish will put the page into workflow. An editor will need to approve the content before it is live to the end user. The editor will receive an email notification when there is something waiting to be approved.
- *3-Step Workflow* – Clicking on Publish will put the page into workflow. There are two different editors that will need to approve the content before it is live to the end user. The first editor will receive an email when the content is initially posted by the creator. The second editor will receive an email notification when the first editor can review the content.
- *4-Step Workflow* – Click on Publish will put the page into workflow. There are three different editors that will need to approve the content before it is live to the end user. The first editor will receive an email when the content is initially posted by the creator. The second editor will receive an email notification when the first editor can review the content. The third editor will receive an email notification when the second editor can review the content.

Workflow User Roles

Author

Authors can create pages. They are unable to change workflow but can look at the Workflow Edit Tab. Authors can change display security. Author's pages will be listed in the Dashboard Pages Awaiting Review when workflow is configured.

Editor

An editor can approve pages. This user cannot change workflow steps but can add authors and any prior-step editor. Editor's pages will be listed in the Dashboard Pages Needing Review when workflow is configured.

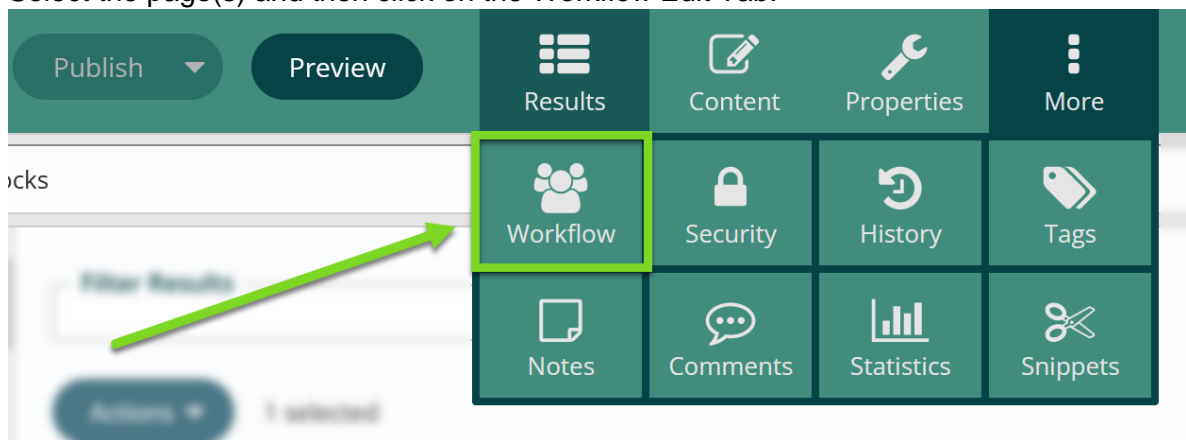
ItemAdmins (Item Administrator)

ItemAdmins can change workflow and assign settings to any editor and author roles. They cannot add New Item Admins. They can assign values but NOT New Group Item Administrators.

Apply Workflow to Pages

Applying workflow to pages ensures the content created is vetted through the workflow process you have determined to work best for your organization.

1. Identify the page or pages where you would like to have workflow applied.
2. Select the page(s) and then click on the Workflow Edit Tab.



3. Choose the level of Workflow your organization has decided upon. In this example, we will be walking through the 2-Step Workflow.

Non-Versioned Data
Changes made to this tab will take effect immediately upon saving.

No Workflow 1-Step Workflow 2-Step Workflow 3-Step Workflow 4-Step Workflow

Reset children to these settings

Document Owner
webmaster

Workflow Roles
Author
Editor 1
Item Administrator




Available Values
Find:
15 of 19 [Show All](#)

Selected Values

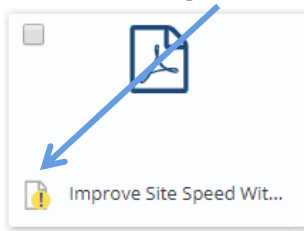
- a. Under Workflow Role, choose AUTHOR
 - b. Under Available Values, choose the GROUP or individual that you would like to be authors for this page.
 - c. Click the GREEN ARROW
 - d. Under Selected Values, you will see the values you selected for authors.
 - e. Under Workflow Role, choose EDITOR 1
 - f. Under Available Values, choose the individual(s) that you would like to be editors for this page. You can choose more than one editor, if you would like.
 - g. Click the GREEN ARROW
 - h. Under Selected Values, you will see the values you selected for editor.
4. If you are doing an entire section of the site, you will choose the PARENT page of the section.
 - a. Select the level of Workflow your organization has decided upon.
 - b. Click on RESET CHILDREN TO THESE SETTINGS to apply the workflow to the entire section of the site.
 - c. Each page created under that parent page will then have workflow applied.

Workflow and Noting Changes

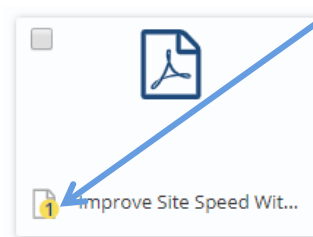
Workflow Tips


- Do not forget to **Publish** your documents to begin the workflow process.
- Any item in the file piles or Navigation Tree with the yellow triangle icon  is still in editing mode.
- Items with a 1  or 2  golden marble are being reviewed.

Item in editing mode



Item in workflow (awaiting editor 1's approval)



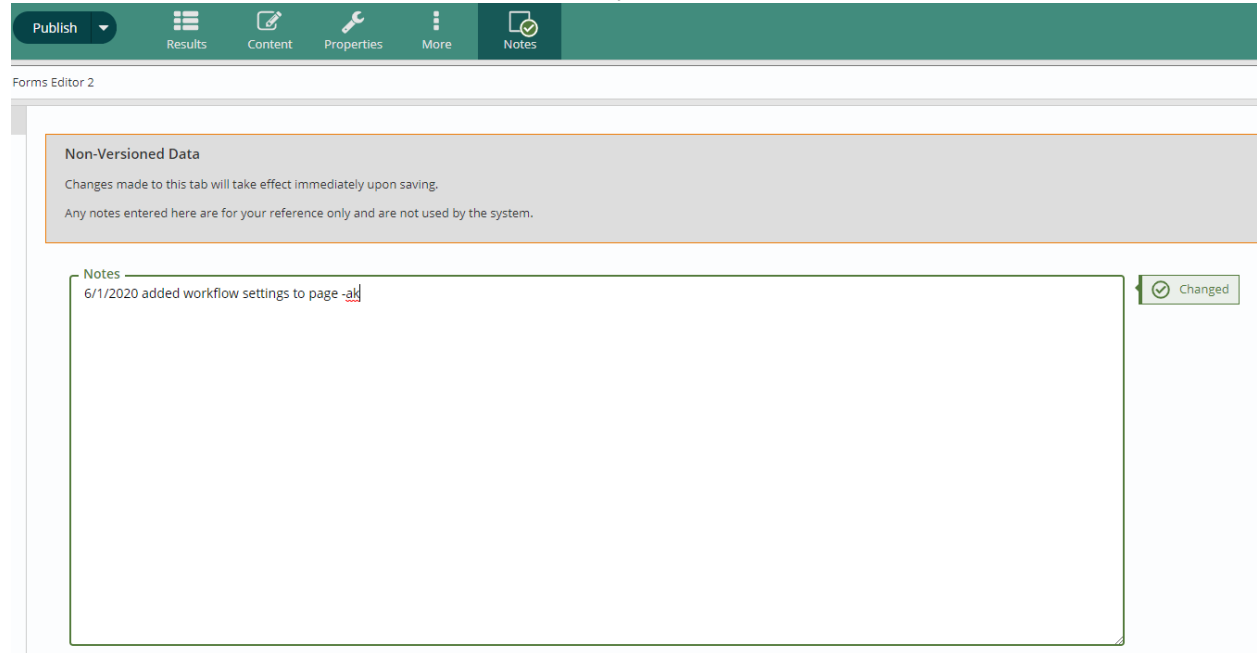
- Items with a little globe icon  are awaiting publishing by the final reviewer.

Use Notes Edit Tab

Using the Notes Edit Tab is a best practice when using Workflow on your site. Why is it important to document your changes?

- It alerts the reviewer to any changes made to a document they've previously approved.
- It speeds up the length of time required for review and approval because they only must look at the changed portion(s) of the page or document.
- It keeps a running tab of all changes to the document or page and who made the changes (which is especially helpful when multiple people have access to a page).

Reviewers can approve/deny items in file piles. When denying an item, they should add a note in the notes edit tab for the document or email you.



1. While you are working on an item, you can go directly to the Notes Edit Tab.
2. Provide the date, the nature of the update and your initials for any edit you make to content pages, files and data items.

Example: 3/18/20 fixed typo in first page -ak

Typical Workflow Scenario

1. Author publishes a page.
2. Editor reviews and approves/rejects change. If rejected, it goes back to the Author.
3. Upon Editor's approval, the webmaster (or designee) will review and provide final approval. The webmaster's publish will cause the item to go live on the site.