Workflow Admin

Through the Workflow Admin applet, you can:

- Setup a criteria based workflows
- Change your criteria based workflow
- Disable your criteria based workflow

Setup a Criteria-based workflow:

Adding the Criteria Based Workflow

1. Log into the Content Server and click Administration>Admin Applets>Workflow Admin.

2. Sign in again with your username and password.

The Workflow Panel now appears.
3. Click the **Criteria Tab**

4. Click **Add**. The New/Edit Criteria Workflow Screen screen is displayed.

5. Enter a name in the **Workflow Name** field.

   **Note**
   
The Workflow Name has a maximum field length of 30 characters and cannot contain special characters (; @ &, and so on).

6. Enter a detailed description for the workflow in the **Description** field.

7. Select the Security Group from the pull-down list.  
   *This is the security group to which the content items in this workflow belongs.*

8. Select an option from **Original Author Edit Rule**. This specifies whether to permit the original author to edit the existing revision or create a new revision if the content item is rejected.

9. Select the **Has Criteria Definition** check box

10. Choose the appropriate Field, Operator, and Value.

11. Click **OK**.
Adding steps to your Criteria Based Workflow

To Add steps to your Criteria Based Workflow:

1. Click **Add** in the right pane of the **Workflow Admin** screen. The Add New/Edit Step Screen is displayed.

2. Enter a **Name** and **Description** for the step. The name cannot be changed after the step is created.

3. Specify the authority level of the users for the step:
   - **Users can review the current revision** — Users can approve or reject the revision but cannot edit the revision.
   - **Users can review and edit (replace) the current revision** — Users can edit the revision, approve it, or reject it. Any edit will not update the revision of the content item.
• **Users can review the current revision or create new revision** — Users can edit the revision, approve it, or reject it. Any edit will update the revision of the content item. This preserves the original content and provides an audit trail of changes.

![Image of Add New Step dialog box]

**Selecting the type of users**

Select the type of users to be added to the step. More than one type of user can be defined for a step.

1. Click **Add Alias**. The Add Alias to Step Screen is displayed. Choose the alias from the displayed list.
2. To add individual user logins, click **Add User**. The Add User to Step is displayed.
- To narrow the list of users, select the **Use Filter** check box, click **Define Filter**, select the filter criteria, and click **OK**.

- To select a range of users, click one user and then hold down the **Shift** key while clicking another user name.

- To select users individually, hold down the **CTRL** key while clicking each user name.

```
<table>
<thead>
<tr>
<th>User</th>
<th>Name</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mario</td>
<td>McHenry</td>
<td>OIT</td>
</tr>
<tr>
<td>mario</td>
<td>McHenry</td>
<td>OIT</td>
</tr>
<tr>
<td>mariominime</td>
<td>McHenry</td>
<td>CCE</td>
</tr>
</tbody>
</table>
```

2. Click **OK**.

3. Click the **Exit Conditions** tab.

4. Specify how many reviewers must approve the revision before it passes to the next step.
   - To require approval by all reviewers, select **All reviewers**.
To specify a minimum number of reviewers who must approve the revision, select At least this many reviewers and enter the number.

![Image of the Required Approvers section]

**Enabling your Workflow**

1. Click the Enable button
2. A confirmation window will appear.
3. Click **Yes**.

**Changing a Criteria Workflow**

To change an existing Criteria workflow:

1. Display the *Workflow Admin: Criteria Tab*.
2. Select the workflow you want to change in the left pane.

**Note**

*If you want to add or delete steps, disable the workflow.*

3. Use the **Add**, **Edit**, and **Delete** buttons in the left and right panes to change the following:
• Workflow description
• Security group
• Type of workflow (criteria or sub-workflow)
• Criteria
• Step description
• Type of step (reviewer, contributor same revision, contributor new revision)
• Users
• Events
• Number of approvals required
• exit conditions

4. If the workflow is disabled, make sure that the correct workflow is selected in the left pane and click Enable. 
   A confirmation screen is displayed.

5. Click Yes to activate the selected workflow.

**Disabling a Criteria Workflow**

To disable a criteria workflow:

1. Display the **Workflow Admin: Criteria Tab**.

2. Select the workflow.

3. Click **Disable**
Note

If there are any content items still in the workflow process, you will be notified that all of the content revisions will be released. If you don’t want to release the content, click No.

4. Click **Yes** to disable the workflow.

The status of the workflow changes to **Disabled**.