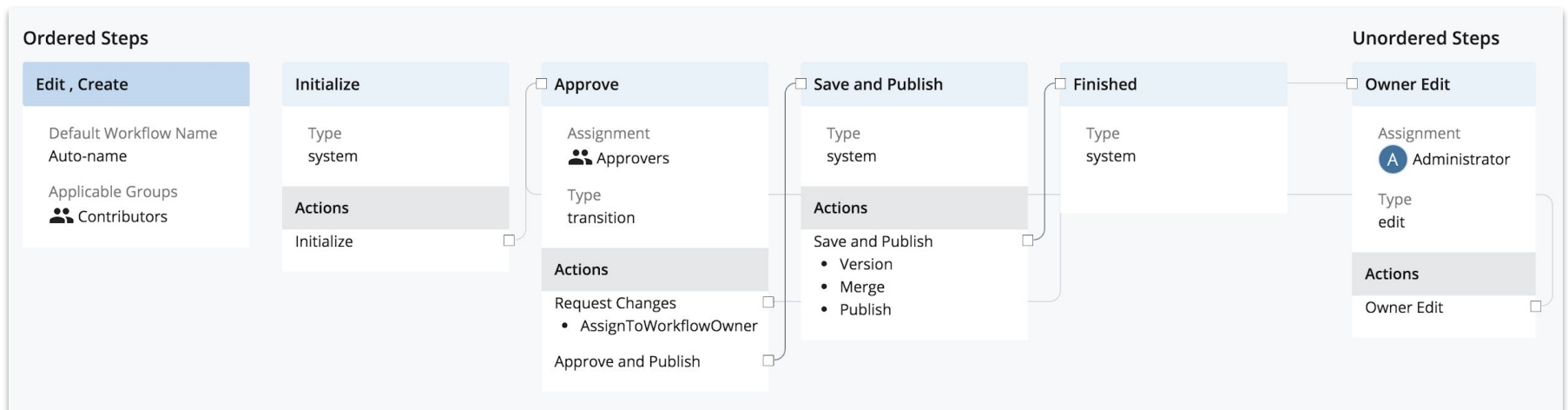


# Cascade CMS: Workflows

# What is a workflow?

A **workflow** is a series of steps that a single asset must go through before it can be created, edited, copied, moved/renamed, or deleted by a user in Cascade CMS.

A **Workflow Definition** is a collection of **steps**, connected by **actions**, which can be enhanced with **triggers**.



# Why use a workflow?

## Accessibility / Content Review

- Ensure content is accessible and meets marketing and technical guidelines before it goes live.
- Supplements user content checks.



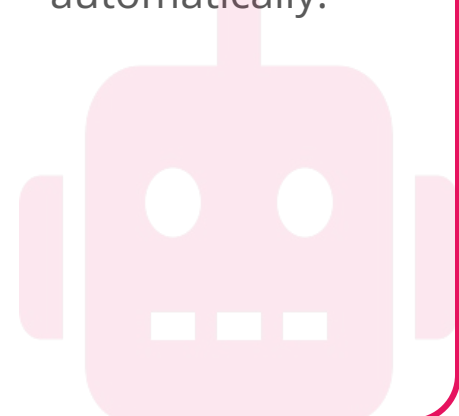
## Permissions

- Customize workflows for different editor groups (automatic vs. approval).
- Allows users of all skill levels to contribute.



## Automation

- Simplify content updates for users by performing certain tasks automatically.
- Ensure related content is published automatically.



# Workflow Types

A workflow's **type** is defined by what action triggers that workflow.

Workflows can be triggered by:

## Create and/or Edit

Publish asset after creation or edits.

## Copy

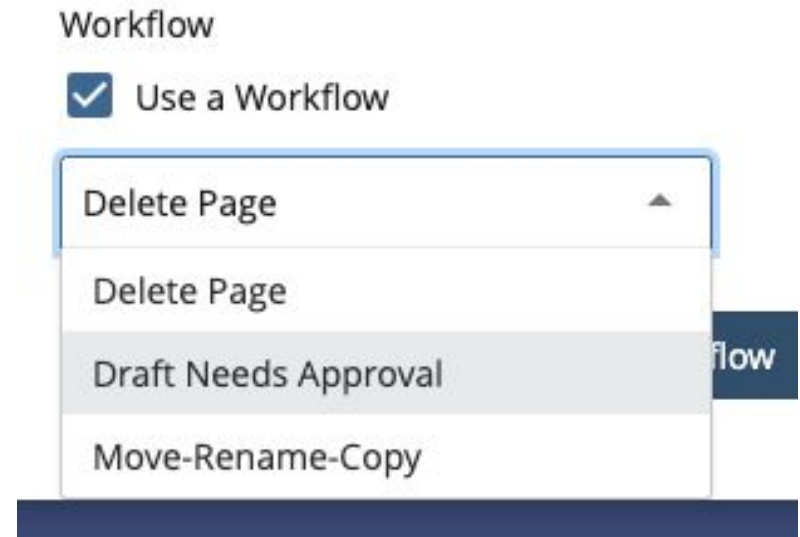
Include an edit step as the first step to make changes to your copy.

## Move/Rename

Unpublish the asset at its previous location, re-publish at its new location.

## Delete

Unpublish the asset before deleting it to prevent outdated files on the web server.



**Important:** A workflow should not combine every trigger, e.g., delete should always be a separate workflow. Multiple workflows can be used with the correct one selected at the point of submission.

# Workflow Components

# Steps

A **step** is an individual moment in a workflow where one or more actions are available.

Certain steps have **step owners** — users or groups responsible for advancing the workflow to the next step by completing an action.

All steps fall into the following categories:

- **Ordered** or **Unordered**
- **System, Transition, or Edit**

## Ordered Steps

- Executed in the order they're defined.
- Defines the "ideal path" of the workflow.

## Unordered Steps

- Exist outside the "flow" of the workflow.
- Only encountered by choice.
- Edit steps are usually unordered.

# Steps (cont.)

## System Step

- Requires no user intervention.
- Single action.
- Possible to have a workflow made of only System steps (automatic).
- First and last steps in any workflow will be System steps.



## Transition Step

- “Decision Step”
- Two or more actions representing user choices.
- Default assignment to a user/group, with reassignment option.



## Edit Step

- Assets in workflow can only be edited during an Edit step.
- Edit steps are usually unordered steps.
- Has a single action which determines the next step.



# Actions

**Actions** create pathways from an initial step to a final step.

An action's **Transition** determines what step is next in the workflow.

- System and Edit steps will have only a single action.
- Transition steps have multiple actions to choose from.

The screenshot shows a configuration window titled "Edit (Action 3 / 3)". It contains the following fields and controls:

- Action Identifier \***: A text input field containing the value "edit".
- Action Label**: A text input field containing the value "Edit".
- Transition \***: A dropdown menu with the selected value "Approver Edit".
- Available Triggers**: A dropdown menu with the selected value "AssignStepIfUser".
- + Add a Trigger**: A button to add more triggers.
- PreserveCurrentUser (Trigger)**: A section header for a trigger, with a red 'X' icon to its right.
- + Add parameter**: A button to add parameters to the trigger.



# Triggers

**Triggers** perform tasks when their associated action is reached. Triggers can be customized with parameters. Notable triggers include:

- **Version, Merge, Publish (VMP)**
  - Create a version, merge working copy into current version, publish.
- **Email**
  - Sends an email to the owner of the following step.
- **AssignToWorkflowOwner**
  - Send the workflow back to the originator.
- **PreserveCurrentUser**
  - Keeps the following step with the current step owner.
- **Delete** and **UnpublishAndDelete**
  - It's only a workflow so long as there's an asset in the workflow. After these two delete triggers, any asset-based triggers in a workflow will be ignored.

Complete list of triggers and parameters available in the [Cascade CMS Knowledge Base](#).

# Creating Workflows

# Creating Workflows

Cascade CMS has a visual editor that comes with a built-in 5-step approval workflow.

In most cases, it will be quicker / more efficient to import XML from an example and customize it.

## Create from Scratch

- Using the Workflow Definition builder.
- Build your “ideal path” (ordered steps) first, then add exceptions (unordered steps).
- **Tip:** Start by deleting all but the first and last steps in the default workflow.

OR

## Copy Example XML

- Copy, paste, tweak.
- Requires some experience reading XML.
- Full range of examples (all types, approval and automatic) available at Hannon Hill’s [Workflow repo on GitHub](#).

# Assigning Workflows & Workflow Abilities

# Assigning Workflows to a Folder

Workflows are assigned at the folder level but are not applicable to folders. Settings:

## Require Workflow on all contained assets

- Assigned workflows are optional until this setting is enabled.

## Inherit Workflow Definitions from containing folders

- Allows you to manage workflows from the parent folder.
- Doesn't affect the site's base folder.

## Apply setting to contained folders

- One-time action, used to help propagate settings to subfolders.
- Doesn't remain checked because subfolders can be configured individually.

Manage Workflows for folder  
Cascade CMS 101: /

Cancel Submit

Assigned Workflows

- Approval - Create or Edit
- Approval - Delete
- Automatic - Move or Rename

Require Workflow on all contained assets

Yes  No

Apply setting to contained folders

Inherit Workflow Definitions from containing folders

On the site's top level folder, Inherit Workflow Definitions from ancestor folders is only applicable when Apply setting to child folders is checked.

Yes  No

Apply setting to contained folders

# Assigning Workflows to an Asset Factory

Create workflows can also be assigned to Asset Factories.

There are three workflows modes for assets created with an Asset Factory:

## None

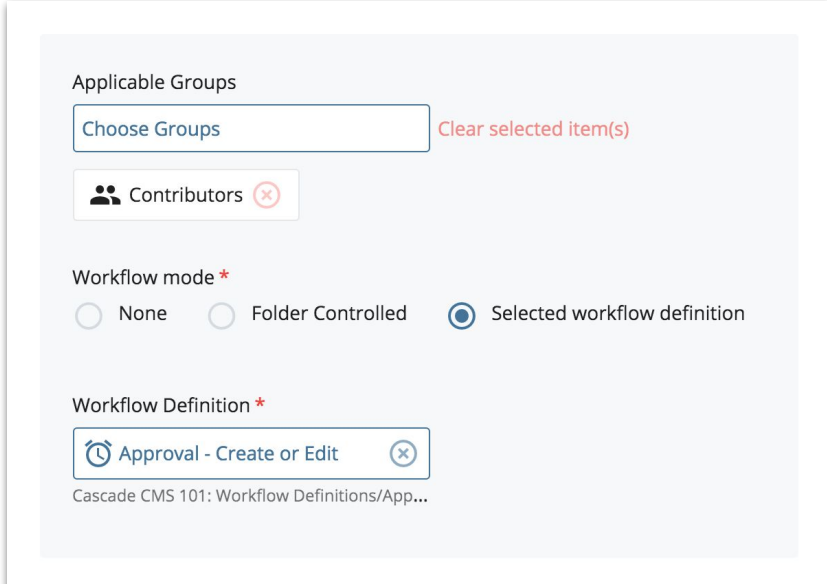
- No workflow is required when creating a new asset with this Asset Factory.

## Folder controlled

- The create workflow assigned to the placement folder will be used.
- If more than one workflow with type “create” is found, only the first one encountered by system will be used.

## Selected workflow definition

- The create workflow selected for the Asset Factory will be used.



The screenshot shows a configuration panel for assigning workflows to an Asset Factory. It includes the following elements:

- Applicable Groups:** A text input field containing "Choose Groups" and a "Clear selected item(s)" button.
- Contributors:** A dropdown menu showing "Contributors" with a close icon.
- Workflow mode \*:** Three radio button options: "None", "Folder Controlled", and "Selected workflow definition" (which is selected).
- Workflow Definition \*:** A dropdown menu showing "Approval - Create or Edit" with a close icon.
- Footer:** The text "Cascade CMS 101: Workflow Definitions/App..." is visible at the bottom.

**Note:** Only “Create” type workflows can be triggered by an Asset Factory.

# Workflow Abilities

Workflow is enforced for users needing Site Role abilities. Related abilities:

## **Bypass workflow**

- Multi-select actions (bulk delete, bulk move/rename, etc.) require this ability because workflows are only applicable to single assets.

## **Assign to self and approve steps in a workflow**

- Users with this ability can be assigned or assign themselves to a Transition step in a workflow.

## **Be assigned to and use Workflow Definitions even if user does not belong to any of their applicable groups**

- You can disable this ability for users who can also bypass workflow to hide the “Use a workflow” checkbox on Submit.

## **Deleting workflows**

- Workflows can be deleted, at any time, by users with an approval role.

## **Workflows assigned to a folder** (a feature, not an ability)

- When uploading an asset, the chooser's upload tab will indicate folders that are restricted by workflow for the user.