

Estrada[®] 3.5
Workflow Manual

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Estrada® 3.5 Workflow Manual

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Workflow

Introduction

Overview

Estrada's *Workflow* feature enables you to define processes in which designated individuals must review all content changes and additions on a given Estrada site before they can be published to the *user side*, the view of an Estrada page that is visible to site visitors.

You can design Workflow so that your Web building and maintenance processes are modeled after your organization's other business procedures. For example, Company X may require a paper memo to be approved by the following managers before it can be mailed: the project coordinator, the department head, the division vice president and the Legal Department. What if the memo were to be published electronically via Company X's employee Intranet? Workflow can easily automate this same multi-level approval chain so that designated individuals receive notification that Web content is ready to be reviewed, read it, make notes, approve or send it back for changes until it ultimately meets all of the reviewers' approval for publication. With Workflow, content modifications and reviews are automated and handled electronically.

Workflow Roles

Workflow users are users with access permissions to a workflow-activated site.

A *workflow chain* is comprised of *reviewers*, a subset of workflow users who review content additions and changes on a workflow-activated site, following a specific hierarchical process. The workflow chain reviewers evaluate content changes as a *bundle*, a set of content additions and/or changes that are grouped together in order to be submitted, reviewed and published as a unit. The highest-level reviewer, the *publisher*, is the only one who can *publish* content bundles, or release them for display on the user side for all site visitors to see.

Activating Workflow

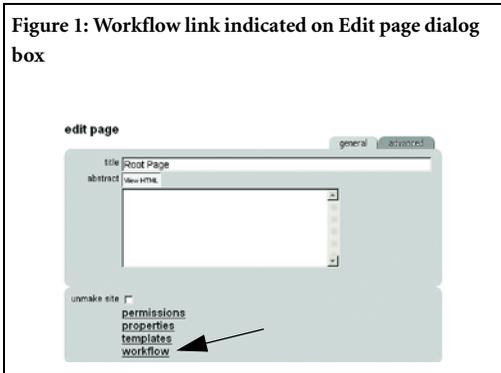
The first step in using the Workflow feature is to activate Workflow. When an administrator turns Workflow on for a site, it becomes a *Workflow-activated site*.

Note: Workflow applies only to the site for which is activated. In other words, you can activate or deactivate Workflow only for one site at a time. Workflow activation and workflow chains that are created on a site are not inherited by any of its sub-sites.

To activate Workflow:

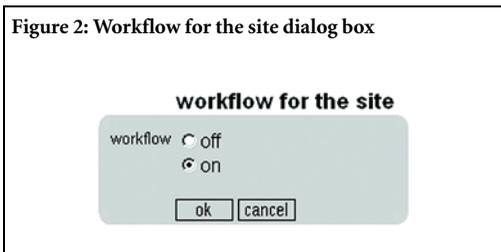
- 1 Click the **edit** button to the left of the site brick where you wish to activate Workflow.
- 2 The **edit page** dialog box will appear.
- 3 Click the **workflow** link. The **manage workflow for site** dialog box will appear.

Figure 1: Workflow link indicated on Edit page dialog box



4 Click the **workflow** link at the bottom of the dialog box. The **workflow for the site** dialog box will appear.

Figure 2: Workflow for the site dialog box



5 Select the **on** radio button and click **ok**.

6 The **edit page** dialog box will appear.

7 Click the **cancel** button to return to the author side of the page and begin using Workflow.

Content Views and Navigating Among Them

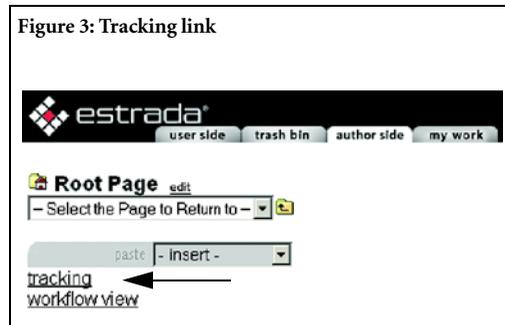
Once Workflow has been activated on a site, workflow control links appear on the author side view of the Workflow site. *Workflow control links* provide access in order to submit, view, and review content changes in a Workflow.

Tracking and My Work Area

Both the tracking and my work areas allow you to keep track of your workflow tasks and the status of your content changes.

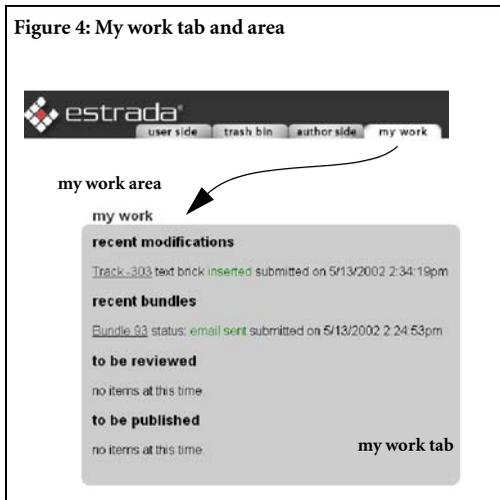
Tracking is where you can bundle content and see what content changes has yet to be bundled. To access tracking, click the **tracking** link, located at the bottom of the *author side view only* of any page in a workflow-activated site.

Figure 3: Tracking link



The **my work** area serves as a personal task list, showing each workflow user or workflow chain member the status of their work on a site. To access this view, click the **my work** tab (Figure 4) at the top of the *author side view only* of any page in a site for which Workflow has been activated.

Figure 4: My work tab and area



The **my work** area contains four sections, each with links to content. You may not have items listed under all or any sections at a given time. Which sections contain items depends on your workflow role, recent content changes that you have made, and where items are in the workflow review process.

- **recent modifications** lists changes that you as the workflow user have made, but not bundled.
- **recent bundles** lists content that you as the workflow user have bundled and submitted for review.
- **to be reviewed** (only for workflow chain members) lists items that you as a workflow chain member have waiting for you to review.
- **to be published** (only for publishers) lists items that are waiting for you to consider for publication.

Approve and Reject Links

After bundles have been submitted to reviewers and/or publishers, they see two more links used for reviewing content changes: **approve** and **reject**. (See "Reviewer Actions during Review" on page 15.) The **approve** and **reject** links are not visible to workflow users.

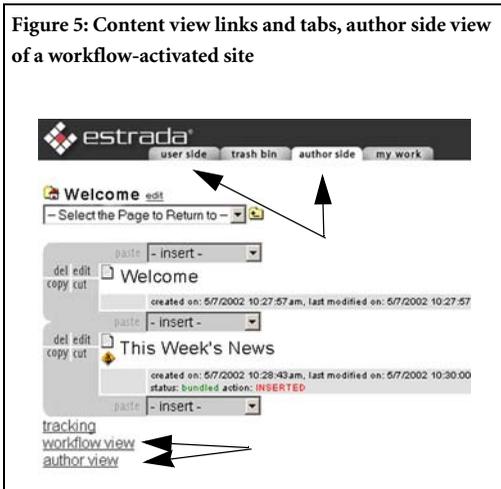
Content Views

On both workflow-activated and non-workflow sites, Estrada users can view their content from either the author side or the user side.

- **user side** is the public view that shows all published content within the context of the site's template. It does not display any items that are being tracked or reviewed through a workflow chain. Just as on a non-Workflow site, the user side of a Workflow-activated site is what visitors to your Web site currently see. To access the user view from the author side of any Estrada page, click the **user side** tab (Figure 5) at the top of any page in a site for which Workflow has been activated. The user side tab is available in all views.
- **author side** shows all content, whether it is already published or (for workflow-activated sites) being tracked, reviewed or under construction. Just as on a non-Workflow site, the author side is where authors and administrators build their site content, but cannot be seen by site visitors or anyone who lacks access permissions to your Estrada installation. To access the author view, click the **author side** tab at top of any page (Figure 5). The author side tab is available in all views except the user view. To

reach the author side from the user side view, use the secret button or designated URL for your installation.

Figure 5: Content view links and tabs, author side view of a workflow-activated site



In addition, workflow-activated sites offer two other ways to view content: *author view* and *workflow view*:

- **author view** shows *all* content and changes on a workflow-activated site (whether they are bundled or not), within the context of the site's template. Author view provides a preview how content would appear to site visitors if all of the changes that have been made were to be published. Use this view as you are developing your content to see if it looks the way that you intend for Web site visitors to see it. To access this view, click the **author view** link (Figure 5

on page 4), located at the bottom of the *author side view only* of any page in a site for which Workflow has been turned on.

- **workflow view** shows content for a Workflow site that has been submitted for review as well as already published content. Workflow view does *not* display content that is under construction but not yet submitted for review. To access this view, click the **workflow view** link (Figure 5 on page 4), located at the bottom of the *author side view only* of any page in a site for which Workflow has been turned on.

Creating and Configuring a Workflow Chain

Note: Only site administrators have access to perform the tasks described in this chapter.

Manage Workflows

After you have activated Workflow, the next step is to set up and manage your workflow chain. A *workflow chain* is a group of Estrada users who review content changes within a specific site, following a specific hierarchical process. The **manage workflows** dialog box is the starting point for adding or removing users from a workflow chain, setting or changing the default interval, and creating or changing the name of workflow chain.

Default Workflow Chain

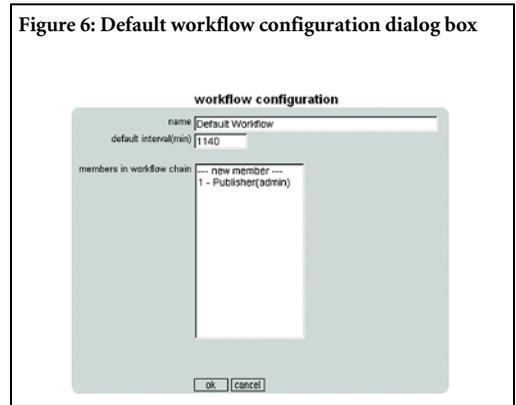
When Workflow is activated for a site, the default workflow chain is automatically established. All users who have access permissions to the site (both authors and administrators) are, by default, workflow users in the default workflow chain. (As new users are granted access to a workflow-activated site, Estrada automatically adds them to the default workflow chain.) The administrator who created the workflow-activated site is automatically the default workflow chain's publisher.

To view the members of the default workflow chain:

- 1 Click the **edit** button to the left of the workflow-activated site brick.
- 2 The **edit page** dialog box will appear (Figure 1 on page 2).
- 3 Click the **workflow** link at the bottom of the dialog box. The **manage workflow for the site** dialog box will open (Figure 7 on page 6).
- 4 Click the **workflows** link. The **manage workflows** dialog box will open (Figure 8 on page 6).
- 5 Select **default workflow** from the menu.

6 Click **ok**. The **workflow configuration** dialog box will open with Default Workflow in the name field (Figure 6 on page 5).

Figure 6: Default workflow configuration dialog box



If you have not made any modifications to the default workflow, only the publisher will be listed in the **members in workflow chain** menu. The username of the publisher will be displayed in parenthesis immediately following - **Publisher**.

If you wish to make another user the publisher for the default workflow chain, follow the instructions for “Modifying the Order and Rights of Members in a Workflow Chain” on page 9.

*** Tip:** Do not make any other manual modifications to the default workflow chain except (if you wish to do so) changing who serves as publisher. It is possible to make the same sorts of modifications to the default workflow chain as you can to any other workflow chain. However, to do so would defeat the purpose of the default workflow, which is to operate automatically. Instead, Estrada recommends creating **new** workflow

chains to accomplish all of your custom workflow needs. (See "Creating a New Workflow Chain" on page 6.)

Note: To view the list of users assigned to a workflow, use the manage workflow users dialog box, which is discussed in "Assigning Workflow Users to a Workflow Chain" on page 10.

Creating a New Workflow Chain

In addition to the default workflow chain, you may create any number of additional workflow chains for each site.

To create a new workflow chain:

- 1 Click the **edit** button to the left of the site brick where you wish to activate Workflow.
- 2 The **edit page** dialog box will appear (Figure 1 on page 2).
- 3 Click the **workflow** link at the bottom of the dialog box. The **manage workflow for the site** dialog box will open.

Figure 7: Manage workflow for the site dialog box



- 4 Click the **workflow** link. The **manage workflows** dialog box will open.

Figure 8: Manage workflows dialog box



- 5 Select **--- new workflow ---** at the top of the menu.

- 6 Click **ok**. The **create new workflow** dialog box will open (Figure 9).

- 7 Enter the title for the new workflow chain in the **name** field.

Figure 9: Create new workflow dialog box



- 8 Enter the default interval (in number of minutes) in the **default interval** field. The *default interval* is the amount of time that can elapse from the time that notification is sent to a reviewer/publisher to review/publish a bundle before an additional reminder is sent. (Estrada will continue to send follow-up reminders each time an interval passes, until the bundle is reviewed/published.)

9 Click **ok**. The **manage workflows** dialog box will open. (See Figure 8: Manage workflows dialog box.) To add workflow chain members, proceed to “Managing Workflow Chain Members (Reviewers and Publishers)” on page 7.

Managing Workflow Chain Members (Reviewers and Publishers)

Estrada Workflow permits an unlimited number of review levels to be added to each workflow chain. The number of members that you assign to a chain, and the roles that you assign to each, determines the number of review levels.

Keep in mind the difference between workflow chain members and workflow users. Workflow chain members (including the reviewer(s) and publisher) review content, while workflow users submit content additions and changes that are reviewed by the workflow chain members.

Members must be assigned to a workflow chain in order from lowest level to highest. Begin by assigning the member who will occupy the first-level (lowest-level) position in the chain. End by assigning the publisher, the highest-level position in the chain.

Example

The manager of an Estrada site wishes to create a workflow chain comprised of two reviewers and one publisher. First, the manager assigns the first-level reviewer as the lowest rung on the review chain. Next, the manager assigns the second-level reviewer. Finally, the publisher is always the *last* member to be assigned to a workflow chain.

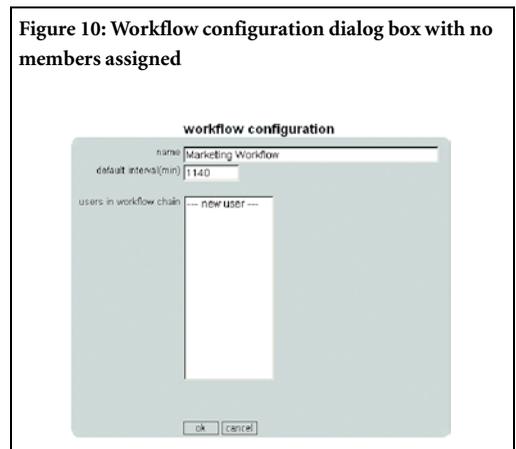
Assigning New Members

Note: Before users can be added as members of a workflow chain, they must first be registered users with access permission to the site where the workflow chain exists. (See the Estrada Administrator Manual for details on site access permissions.)

To assign users as new members to a workflow chain:

- 1 From the **manage workflows** dialog box (Figure 8), select the workflow chain to which you wish to assign members.
- 2 The **workflow configuration** dialog box will open. The workflow chain that you wish to configure is listed in the **name** field.

Figure 10: Workflow configuration dialog box with no members assigned



3 Select --- **new user** --- from the menu. The **workflow approver** dialog box will open.

Figure 11: Workflow approver dialog box, valid users menu closed



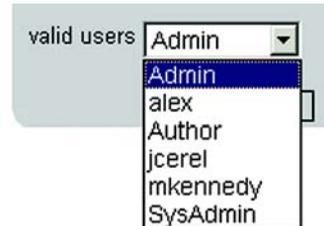
4 Into the **position** field, enter the title for the user's position within the chain.

*** Position Titles:** You can use any pattern that you wish for creating titles for workflow chain positions. Estrada recommends that you use a pattern that matches your business processes. For example, if the first-level reviewer will be your organization's human resources manager, enter the Workflow position title "Human Resources Manager."

*Note: The last reviewer whom you assign to a workflow chain automatically becomes the publisher, regardless of what title you enter in the **position** field.*

5 From the **valid users** menu, select the user whom you wish to assign to this position. The **valid users** menu lists all users with access permission to the site where you are setting up a workflow chain. If you wish to assign a workflow chain position to a user who is not listed in the menu, you must first grant that user access permission to this site. (See the Estrada Administrator Manual for details on site access permissions.)

Figure 12: Valid users menu



6 Click **ok**.

7 Repeat steps 3 through 6 for each user whom you wish to include in the chain. The last reviewer whom you assign will be the publisher for this workflow chain.

8 After all users have been assigned to the chain, click **cancel** to return to the **manage workflows** dialog box (Figure 8).

9 Click **cancel** to return to the **manage workflow for site** dialog box (Figure 7).

10 Click **cancel** to return to the **edit page** dialog box (Figure 1 on page 2).

11 Click **cancel** to return to the author side of the site.

Changing a Workflow Member's Position Title

Any time after members have been assigned to a workflow chain, their **position** titles can be changed.

Note: Changing the position title for a workflow chain member changes only the member's title; it does not affect that member's function or place within the workflow chain hierarchy. To change an existing workflow chain member's function and/or place within the chain hierarchy, see "Modifying the Order and Rights of Members in a Workflow Chain" on page 9.

To change a Workflow member's title:

- 1 From the **manage workflows** dialog box (Figure 7), select the workflow chain in which you wish to change a position title.
- 2 Click **ok**. The **workflow configuration** dialog box will open. The workflow chain that you are configuring is listed in the **name** field (Figure 10).
- 3 Select from the menu the name of the member whose position title you wish to change. The **workflow approver** dialog box will open (Figure 11).
- 4 Select from the **valid users** menu the name of the member whose position title you wish to change.
- 5 Edit the name in **position** field.
- 6 Click **ok**.

Modifying the Order and Rights of Members in a Workflow Chain

After you have assigned members to a workflow chain, you can modify which members occupy the roles in that chain, for example, having the first-level and second-level reviewers change places.

Note: Modifying the order of reviewers and/or the publisher has the effect of changing their rights within the workflow chain. For example, if you exchange the places of the publisher with the first-level reviewer, both of these chain members' rights would change as well. The former publisher (now the first-level reviewer) would only be able to review bundles, while the former first-level reviewer (now the publisher) would be able to publish bundles.

To modify the order and rights of existing workflow chain members:

- 1 From the **manage workflows** dialog box (Figure 7 on page 6), select the workflow chain to which you wish to modify members' order or rights.
- 2 Click **ok**. The **workflow configuration** dialog box will open. The workflow chain that you are configuring is listed in the **name** field.

Figure 13: Workflow configuration dialog box, showing members assigned



- 3 Select the member whom you wish to modify from the **members in workflow chain** list. The **workflow approver** dialog box for that member will open.

Figure 14: Workflow approver dialog box, valid users menu open



4 Select from the **valid users** menu the name of the member whom you wish to reassign to this **workflow approver** position.

5 Edit the name in **position** field (optional).

6 Click **ok**. The **workflow configuration** dialog box will open. The workflow chain that you are configuring is listed in the **name** field. The member whom you selected in step 4 now occupies a new role in the workflow chain.

7 Repeat steps 3-6 for any other members whose order or rights in the chain that you wish to modify.

8 Click **ok** to return to the **manage workflows** dialog box.

Assigning Workflow Users to a Workflow Chain

Assigning Workflow Users

Reminder: Workflow users submit content additions and changes.

As discussed in “Default Workflow Chain” on page 5, all users with access permissions to a workflow-activated site are assigned by default to the default workflow chain as workflow users. In order to assign users to any other workflow chain other than the default, you must assign them to an alternate chain.

All users with access to a workflow-activated site are assigned to one workflow chain for that site; they cannot be assigned to more than one chain.

Note: A workflow chain must already exist before you can assign users to it. For instructions on creating a new workflow chain, see “Creating a New Workflow Chain” on page 6

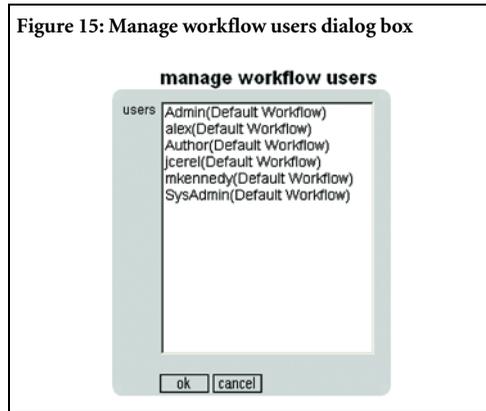
To assign users to a workflow chain:

1 Click the **edit** button to the left of the workflow-activated site brick.

2 The **edit page** dialog box will appear (Figure 1 on page 2).

3 Click the **users** link at the bottom of the dialog box. The **manage workflow users** dialog box will open. (Figure 15)

Figure 15: Manage workflow users dialog box



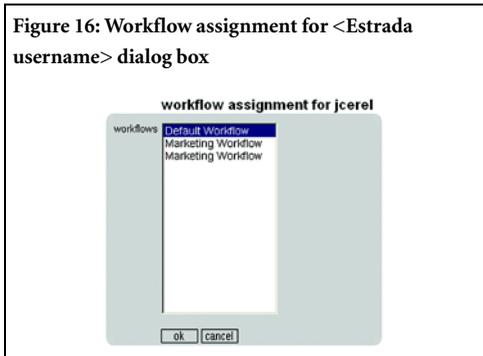
4 From the **users** menu, select the name of the user whom you wish to assign to a workflow chain.

5 Click **ok**. The **workflow assignment for <Estrada username>** dialog box will open. (Figure 16)

6 Select the name of the workflow chain to which you wish to assign the user.

7 Click **ok**. The **manage workflow users dialog box** will open (Figure 15).

Figure 16: Workflow assignment for <Estrada username> dialog box



8 If you have more users to assign to workflow chains, repeat steps 4-7 again for each additional user.

9 When you finish assigning users to workflow chains, click **cancel** to return to the **manage workflows for the site** dialog box.

10 Click cancel to return to the **edit page** dialog box.

11 Click cancel to return to the author side.

Reassigning Workflow Users

If you wish to remove a user from a workflow chain and reassign him to another workflow chain (including the default workflow), follow the instructions for “Assigning Workflow Users to a Workflow Chain” on page 10, selecting the desired workflow chain name in step 6.

Making and Submitting Content Changes for Review

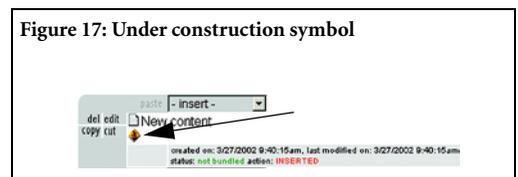
Note: Only site administrators have access to perform the tasks described in this chapter.

Making Content Additions and Changes

The process of building and editing bricks for workflow-activated sites is similar to that for sites with Workflow deactivated. Any user with access permissions to a site can add content or make changes. (See Estrada Author Manual for information on content development.) The primary difference is that workflow-activated sites require content changes to be reviewed by a workflow chain before they can be published.

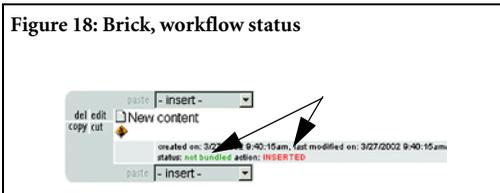
Another difference is the appearance of bricks. Bricks that are inserted or modified on a workflow-activated site display an orange under construction icon until they are published.

Figure 17: Under construction symbol



Additionally, in the author view, bricks that are being processed in a Workflow display a line at the bottom of each brick (Figure 18). The line shows the brick’s workflow **status**, which means whether the brick has been **bundled** or **not bundled** (See “Submitting work for review: Tracking” on page 12) and the last

action that has been taken upon the brick, for example, having been **inserted**, **deleted**, or **pasted**.



Submitting work for review: Tracking

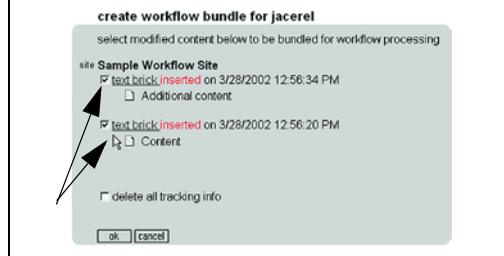
After an author has completed content changes on a workflow-activated site, the changes must be bundled and submitted in order to be reviewed and ultimately published. A *bundle* is a set of content additions and/or changes that are grouped together in order to be submitted, reviewed and published as a unit.

Note: Although it is possible for a bundle to contain any number of items or changes, Estrada Workflow treats all items within a bundle as a single unit, regardless of how many items that each bundle contains. In other words, all items in a bundle must be approved in order for any single item to be published, so plan the size of each bundle accordingly.

To create a Workflow bundle:

- 1 Complete all content changes that you wish to include in the bundle.
- 2 Click the **tracking** link at the bottom of any page in the site where you are working. (Figure 3 on page 2) The **create workflow bundle for <Estrada username>** will open, displaying content changes that you have made since creating your last bundle in this site.

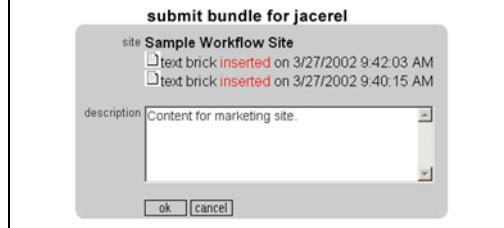
Figure 19: Create workflow bundle for <Estrada username> dialog box, with all items selected



- 3 Select the boxes to the left of the items that you wish to include in this Workflow bundle. *Only those items that you select in this step* will be included as part of the bundle. Although items that you do not select at this time will not be bundled, they will remain in tracking until manually deleted. (See "Deleting All or Partial Tracking Information" on page 13.)

- 4 Click ok. The **submit content for <Estrada username>** dialog box will open.

Figure 20: Submit content for <Estrada username> dialog box



- 5 Enter explanatory information or other comments into the **description** field (optional).

***Tip:** *The best practice is always to include comments each time that you submit, approve, or reject a Workflow bundle. Comments help others in the Workflow better understand the reasoning behind your actions and can serve as reminders to yourself and others.*

6 Click **ok**. Your bundle has been created. After a bundle is submitted for review, Estrada sends an email notification to the first-level reviewer. (See “Reviewer Actions during Review” on page 15.)

Locked Pages

After a bundle has been created, all pages that are affected by the changes in that bundle will remain *locked*, no longer able to be modified, for the duration of the Workflow process (until the bundle is published or Workflow is deactivated for the site). Locked pages are indicated by a locked icon, located to the left of the brick title (Figure 21).

Figure 21: Locked icon



The purpose of locking pages is to prevent additional changes from being introduced to a page until a workflow chain finishes reviewing and approving all previously bundled changes. Not only does locking pages avoid confusion—imagine trying to review a page with content that

keeps changing—but also it ensures that all submitted content changes are thoroughly reviewed before being published.

The only time(s) that a page can unlock is if a bundle were to be rejected by a reviewer and returned to the author who created it. In this case, the page(s) containing items in the rejected bundle will unlock *only for the person to whom the bundle was rejected*. This allows the rejectee to make necessary changes and resubmit the bundle. (See “Working with Rejected Content” on page 17.) After the bundle is resubmitted, the page(s) lock again.

Deleting All or Partial Tracking Information

When Workflow has been activated, *all* content changes in the affected site are tracked automatically. If you decide that you do not wish to submit *any* of your changes for review, you can delete all tracking information about your work recorded since the last time that you last created a bundle. Deleting all tracking information allows you to begin making content changes with a clean slate.

Deleting All Tracking Information

To delete all tracking information:

- 1 Click the **tracking** link at the bottom of any page in the site where you are working (Figure 3 on page 2). The **create workflow bundle for <Estrada username>** will open (Figure 19 on page 12).

2 Select the check box to the left of **delete all tracking information**.

Figure 22: Delete all tracking information check box



3 Click **ok**.

CAUTION: Delete all tracking information erases *all* of the items listed in the create workflow bundle for <Estrada username>. This is a permanent action and cannot be undone.

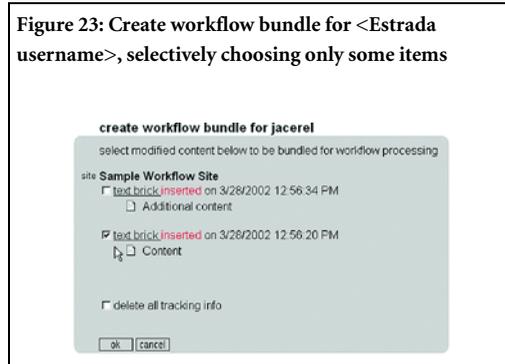
Selectively Deleting Partial Tracking Information

If you wish to submit some items in the tracking record while deleting others, you can create a bundle that contains only selected items. Then delete the items that you wish to discard from tracking.

To selectively choose items to include in a bundle:

1 Click the **tracking** link at the bottom of any page in the site where you are working. The **create workflow bundle for <Estrada username>** will open.

Figure 23: Create workflow bundle for <Estrada username>, selectively choosing only some items



2 Check the boxes to the left of only those items that you wish to *preserve* (only those items that you wish to *include* in a bundle for submission). Leave items that you wish to delete unchecked.

3 Enter explanatory information or other notes into the **description** field (optional).

4 Click **ok**. Your bundle containing only those items that you selected is now created. The **create workflow bundle for <Estrada username>** dialog box will still be displayed.

5 Select the radio button to the left of **delete all tracking information**. This will delete all remaining items displayed above in the dialog box.

6 Click **ok**.

Reviewing Content Changes

Reviewer Actions during Review

Workflow chain members (reviewers and publishers) review content additions and changes. For sites with multiple workflow chains, only members of a particular workflow chain review bundles that have been submitted to their chain. (In other words, a bundle submitted to one workflow chain can only be reviewed and published by that same chain. No chain has access to other chains' bundles.)

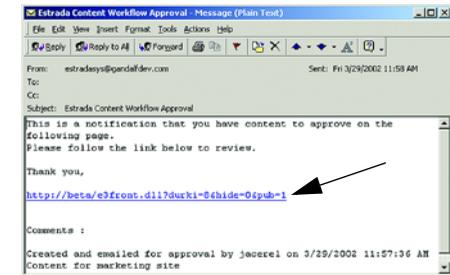
For sites with multi-level Workflow reviews, reviews must be completed sequentially (first-level, second-level, etc.) before the bundle can move up to the next review level. The procedure for reviewing content is the same for all reviewers, regardless of their order within the workflow chain hierarchy. (This includes publishers, who must first review content before they can publish it).

To review content:

- 1 Email notification will arrive, indicating that content is ready for you to review on a page and any comments that have been attached to the

bundle (Figure 24). If there are multiple pages to be reviewed, you will receive a separate email for each page.

Figure 24: Estrada Content Workflow Approval email notification



- 2 Click the link in the email. A browser window will open, showing a workflow view of the page for you to review.

*Note: The **approve** and **review** links will not be available on the workflow view until after the workflow chain member logs in.*

Figure 25: Workflow view before login



- 3 From the page that opened in the previous step, log in to your site, using the secret button or authoring entrance URL. You can return to the workflow view to see the content with the

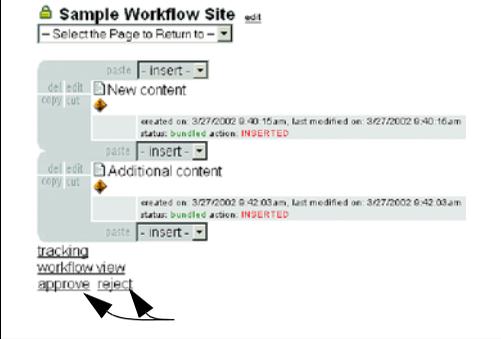
template by clicking the **workflow view** link. (After you have logged in, the approve and reject buttons will be available in the workflow view.)

4 If you wish to *approve* the content, click the **approve** link or button, available from the workflow, author side, and author views. (See Figures 26 and 27.)

Figure 26: Approve and reject buttons, workflow view or author view



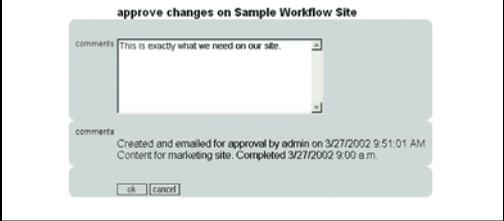
Figure 27: Approve and reject links, author view



5 The **approve changes on <name of site>** dialog box will appear.

- Enter any notes that you wish to add into the **comments** field (optional).

Figure 28: Approve changes on <name of site> dialog box



- If you wish to *reject* the content, click the **reject** link or button, available from the workflow, author side, and author views. (See Figures 26 and 27.) The **reject changes** dialog box will appear (Figure 29).

- Enter any notes that you wish to add into the **comments** field (optional).
- From the **reject to** menu, select the user to whom you wish to send the rejected bundle.

Figure 29: Reject changes dialog box



6 Click **ok**.

- If you approve the bundle, it will proceed to the reviewer who is above you in the workflow chain (if any) or to the publisher. (See “Publishing Content” on page 18.)
- If you reject the bundle, notification will be sent to the user selected from the **reject to** menu. (See “Working with Rejected Content” on page 17.)

Working with Rejected Content

Role of Reviewers

If a bundle is rejected and returned to a reviewer, the reviewer can review the content and notes associated with the bundle. Then the reviewer can either approve the bundle to send it to the reviewer/publisher who is one level above in the chain, or reject it to someone below in the chain or to the workflow user who created the bundle.

(See “Reviewer Actions during Review” on page 15.) However, reviewers themselves cannot make changes to pages affected by a bundle while a workflow chain is in progress. All pages containing changes under review by a workflow review process remain locked to all, except if a bundle is rejected to the workflow user who created the bundle. (See “Role of Authors: Modifying Rejected Content” on page 17.)

Role of Authors: Modifying Rejected Content

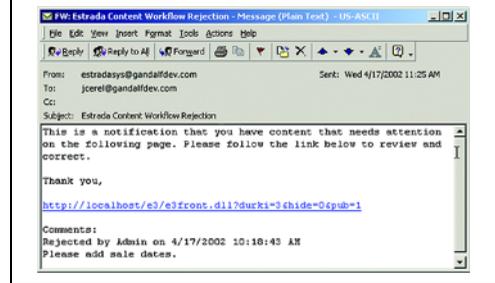
If a bundle is rejected and returned to the author who created it, the pages affected by the bundle will *unlock*, become modifiable only by the author

to whom the bundle has been returned, so that the author can make necessary changes. (See “Locked Pages” on page 13.)

To make changes to a rejected bundle:

- 1 The author receives email notification indicating that a bundle has been rejected with any notes entered during the review process (Figure 30).

Figure 30: Rejected content email notification



- 2 Click the link in the email. A browser window will open, showing the workflow view of the page that contains content that has been rejected and sent back to you.

- 3 Log in to your site as you normally would, using the secret button or authoring entrance URL. You can review the content from the workflow view, author view or the author side by clicking the respective tab or link.

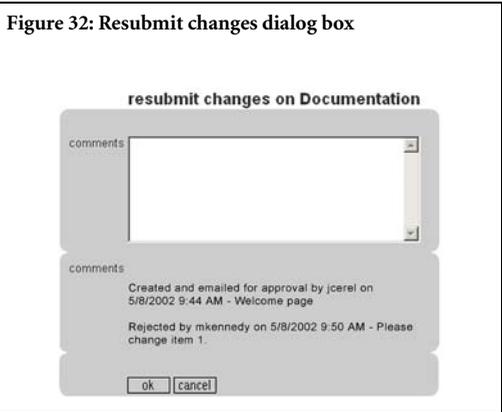
- 4 Make changes as directed by your reviewer or publisher’s note(s) in the email notification from step 1.

Note: Pages containing items that are part of the rejected bundle will unlock for you to make changes until you resubmit the bundle.

5 Click the **resubmit** link at the bottom of the author side of the page (Figure 31). The



resubmit changes dialog box will open (Figure 32).



6 Enter text into the **comments** field (optional).

7 Click **ok** to resubmit the bundle. The review chain begins over again as the bundle is resubmitted to the first-level reviewer. (See "Reviewer Actions during Review" on page 15.) All pages containing items affected by items in the bundle will again lock.

Publishing Content

After the bundle has been approved by all reviewers in the workflow chain, it then moves on to the publisher. Before publishers can decide whether or not to publish content, they must first conduct one last review, following the procedure outlined in "Reviewing Content Changes" on page 15.

After the publisher approves the bundle during the final review phase, the bundle moves to the final publication review phase.

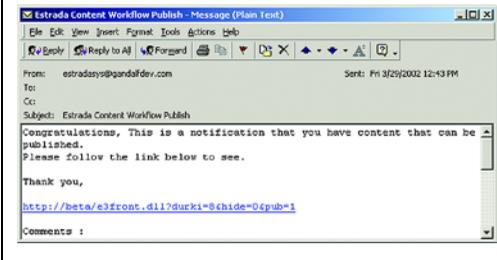
To review a bundle for publication:

1 Email notification will arrive, indicating that content is ready for you to review it (Figure 33 on page 19). The email will also contain any comments that have been attached to the bundle throughout the workflow chain.

2 Click the link in the email. A browser window will open, showing the workflow view of the page that contains content for you to consider for publication.

3 If you are already logged in to Estrada, skip this step. Log in to your site as you normally would, using the secret button or authoring entrance URL.

Figure 33: Estrada Content Workflow Publish email notification



4 Click the **my work** tab in order to open the **my work** area (Figure 4 on page 3). Decide whether you wish to publish or reject the bundle.

- If you wish to *publish* the content, click the **approve** link at the bottom of the page, which appears at the bottom of both the workflow and the author side views (Figures 24 and 26).
 - Click **ok**. The changes recorded in the bundle will immediately be published to the user side of the site.
- If you wish to *reject* the content, click the **reject** link at the bottom of the page, which appears at the bottom of both the workflow and the author side views (Figures 24 and 26). The **reject changes** dialog box will appear (Figure 29 on page 16).
 - Enter information into the **comments** field (optional).
 - From the **reject to** menu, select the user to whom you wish to send the rejected bundle.
 - Click **ok**. The bundle will be sent back to the reviewer or author whom you selected in the previous step. (See “Working with Rejected Content” on page 17.)

5 After a bundle has been published, Estrada will send email notification to the user who originally submitted the bundle.

Deactivating Workflow

CAUTION: Deactivating workflow for a site will immediately delete *all* workflow chains and unpublished data on the site. All content changes—no matter whether the changes were bundled or not, nor where the bundles were in the workflow chain review process—will be deleted. Additionally, all custom workflow chains and/or changes to the default workflow chain will be deleted, as well as all custom or default workflow user assignments. These are permanent actions, which cannot be reversed.

To turn Workflow off:

- 1 Click the **edit** button next to the site brick.
- 2 The **edit page** dialog box will appear.
- 3 Click the **workflow** link.
- 4 The **workflow for the site** dialog box will appear. (See Figure 2: Workflow for the site dialog box.)
- 5 Select the **off** checkbox and click **ok**.

6 A **turn workflow off for the site?** warning dialog box will open.

- If you wish to deactivate workflow for the site, click **ok**.
- If you do not wish to deactivate workflow or are unsure whether you want to, click **cancel**. The **workflow for the site** dialog box will appear. Click **cancel**.

7 The **edit page** dialog box will appear.

8 Click the **cancel** button to return to the author side.

4 After the publisher has approved the bundle containing the site deletion, the site will be deleted.

Method II: Deactivate Workflow before deleting site

1 Deactivate Workflow for a site following the instructions under “Deactivating Workflow” on page 19.

2 Delete the site following the steps for “Deleting a site” in the *Estrada Administrator Manual*.

Deleting a Site

Like other content changes in a workflow-activated site, site deletions must be reviewed and published before they can take affect. There are two methods for deleting a workflow-activated site.

Method I: Delete a site while Workflow is activated

1 Follow the steps for “Deleting a site” in the *Estrada Administrator Manual*.

2 Submit the site deletion as an item in a bundle, follow the instructions for “Submitting work for review: Tracking” on page 12.

Note: Be sure to state clearly in the comments field that you are including a site deletion as part of the bundle to alert the reviewer(s) and publisher.

3 Conduct the workflow review process on that bundle, following the instructions for “Reviewing Content Changes” on page 15 in this manual.

Glossary

abstract	A brick's abstract is a text field that can be attached to the brick to describe the content.
administrator	A special type of Estrada author with additional capabilities such as changing the appearance of the site, granting authors permission to edit parts of the site, creating new sites, adding navigation sidebars, etc. (See also <i>root administrator</i> and <i>author</i>).
author	An Estrada user who has the capability to add and edit content for designated sites.
author view	A content view available only for workflow-activated sites that shows <i>all</i> content and changes (whether they are bundled or not) within the context of the site's template.
brick	The basic building unit of Web content in Estrada.
browser	The generic name for a program that allows you to view Web sites on the World Wide Web.
category	A subdivision or class of content within a category set. See <i>taxonomy</i> and <i>category set</i> .
category set	A brick used in taxonomy for creating groups of content types that are related in some manner. Category set bricks are only visible on the author side of a page.
content	The material that Estrada authors create and edit on a Web page.
copy	An Estrada brick editing function that allows you to make a duplicate or duplicates of a brick; it is similar to the copy function in a word processing application.
cut	An Estrada brick editing function that allows you to pick up a brick so that it can be moved elsewhere; it is similar to the cut function on a word processing application.

default template	The template or graphical identity that establishes how your site will appear to most end users unless an alternate template has been designated through the locations feature. See also <i>template</i> and <i>locations</i> .
default workflow chain	Automatically established when Workflow is activated for a site, the default workflow chain comprises all users who have access permissions to the site (both authors and administrators) as workflow users, and the administrator who originally created the site as the publisher.
delete	An Estrada brick editing function that allows you to remove a brick and all the material in that brick entirely. See also <i>trash bin</i> .
durki value	The numeric value that identifies each individual Estrada page. See also <i>page identifier</i> .
Estrada Template Library (ETL) template	A type of template, developed using Active Server Pages (ASP), that permits some customization and greater flexibility than standard internal templates, such as template elements that change when viewed from the user side, according to the page or site where the template is being used.
external resource images	Estrada Image Library images with source files located anywhere on the Internet. See also <i>internal resource images</i> and <i>image library</i> .
format	Feature that can be used to customize the appearance of various types of Estrada bricks throughout a single site.
image library	Collection of images that can be associated with Estrada bricks
internal resource images	Estrada Image Library images with source files located in a subdirectory on the Estrada server. See also <i>external resource images</i> and <i>image library</i> .
internal template	A type of template that uses HTML, remains static wherever it is used throughout a site, and offers standard Estrada flexibility, such as changing the name of the page that is displayed in the template on the user side
locations	Can be used by Estrada administrators to cause a particular template to display when a user accesses an Estrada site using a particular URL. See also <i>default template</i> and <i>template</i> .
original brick	A brick that was not created through the use of the copy function, but instead was created using the insert drop-down menu.

page identifier	The numeric value that identifies each individual Estrada page. To locate the page identifier, look at the URL (Web address) for the page. The first number located after the equal sign is the page identifier. See also <i>durki value</i> .
Pandora external templates	A type of template that permits developers maximum flexibility to create dynamic and customized content when pages are viewed on the user side. Pandora template developers must be familiar with Active Server Pages (ASP) and server-side scripting languages that support COM (Component Object Model).
parent site	A site in the site hierarchy that contains lower-level sites within it.
publisher	The highest-level reviewer of a Workflow chain who decides whether or not to publish all content changes within a site for which Workflow has been activated. See also <i>Workflow</i> , <i>Workflow chain</i> , and <i>reviewer</i> .
related items	A brick used in taxonomy. When placed on an individual page, the related items brick shows links to related content items on the user side of the page. If a Pandora External Template is being used on the site where a related items brick is placed, the links to related items belonging to the category set selected will be clustered together when displayed on the user side.
reviewer	An Estrada user and member of a Workflow chain who approves or rejects all content changes within a site for which Workflow has been activated. See also <i>Workflow</i> , <i>Workflow chain</i> , and <i>publisher</i> .
root administrator	An Estrada administrator who has complete control over an Estrada installation, including all sites and users. See also <i>administrator</i> .
root page	The top-most page in the hierarchy of an Estrada Web site installation.
root site	The top-most site that encompasses all of the sub-sites in an Estrada installation.
shortcut brick	A copy of an original brick. See also <i>original brick</i> .
site	One or more Web pages that function as a unit, and to which access can be limited to specific authors or administrators. For example, pages within a site may share the same template, or if the author is granted access to an Estrada site, he or she gains access to all pages within that site.
tag	A brick used in taxonomy to record to which category or categories individual pages belong. Tag bricks are only visible on the author side of the page.

taxonomy	An Estrada feature that enables you to classify content and make connections among related content items. As you add new content or make changes to your site, Taxonomy helps with site maintenance by forging and updating connections.
template	A file that provides the visual design information for one or more Estrada sites, controlling how your site looks to end users. Template files also control which areas of a page contain dynamic and static content. The template file contains HTML coding, images, and Estrada-specific tags.
trash bin	A location where you can retrieve bricks that have been deleted. See also <i>delete</i> .
undo	Feature enabling previous version(s) of a brick to be restored, replacing a current version of the brick.
user	Visitors to an Estrada Web site — people who simply read the information on your Web pages, but have no ability to modify the content of the site.
Workflow	A feature that enables you to define processes in which designated individuals must review all content changes before they can be published to the user side. Workflow is especially useful for sites with sensitive content. Workflow chains can be modeled after an organization's business procedures.
workflow chain	A group of Estrada users who review content changes within a specific site, following a specific hierarchical process.
workflow chain members	A special class of Estrada users who have been assigned to a workflow chain to review content changes, following a specific hierarchical process, within a Workflow-activated site.
workflow users	Estrada users who have access permissions to a Workflow-activated site
workflow view	A content view available only for workflow-activated sites that shows content changes that have been submitted for review as well as already published content. Workflow view does <i>not</i> display content that is under construction but not yet bundled (submitted for review).

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