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Training Tuesday

Setting Up CMS Workflow Publishing

Presented by:

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Overview

1. What is workflow?
2. Workflow setup options
3. Who can set up approvals?
4. Other Considerations
5. Demo
 - User Level Approval
 - Section Level Approval
 - Bypass Approval
 - Managing Approvals
6. Q&A



WHAT IS WORKFLOW?

Workflow is the process of submitting files to others for approval and publication. Administrators can control who can publish on the site. This is configured through User-to-User relationships.

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User Level



Section Level



Page Level



**Bypass
Approval**

WORKFLOW SETUP OPTIONS

■ Examples of each option:

1. A department chair must approve all edits made by people in the department

Set up a user-level approver

2. The Head of Alumni Relations must approve all edits made within the Alumni Section

Set up a section-level approver

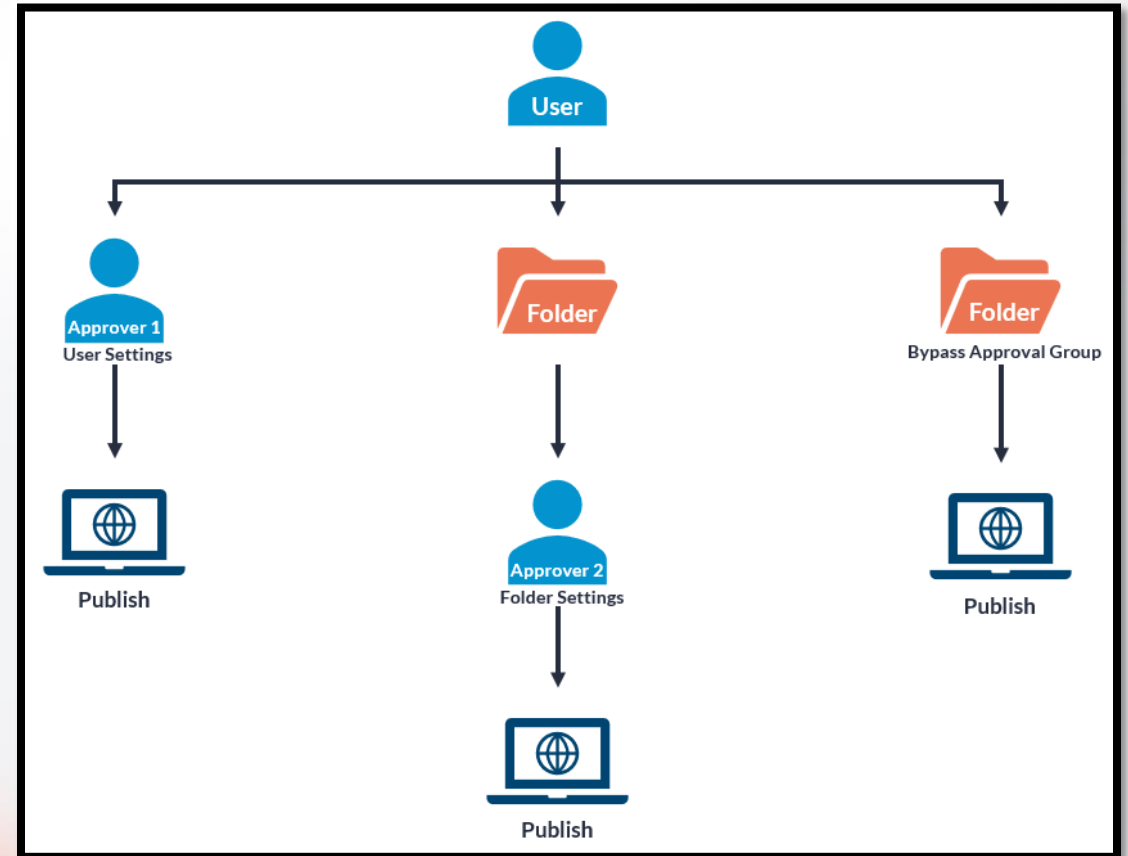
3. A faculty member should be able to publish updates to their faculty page without approval

Set up a Bypass Approval Group

WORKFLOW SETUP OPTIONS

- The system is designed with the flexibility to allow multiple levels of review and multiple potential approvers
- A user can pass through multiple workflow processes
- Remember that access settings on content take **precedence** over settings at the user level

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WORKFLOW SETUP OPTIONS

When assigning approvers and bypass approval, make sure to **"Apply Selected Settings to This Folder and All Enclosed Files and Folders"** for these changes to take effect on existing pages/folders.

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Access Settings - /athletics

Recursive Modification

Apply All Settings to This Folder Only
 Apply Selected Settings to This Folder and All Enclosed Files and Folders

Recursive modification does not apply to directory variables; directory variables are always inherited.

Use the checkboxes below to select settings to apply to this folder and all enclosed files and folders.

Access Group

The group with rights to edit this folder.

Approver

Setting an approver overrides all users' approvers for this folder.

Enforce Approver Yes No

Bypass Approval

The selected group can bypass the approval process and publish this folder immediately.

WHO CAN SET UP APPROVALS?

You must be a Level 9 or 10 administrator to set up workflow

Section, Page, and Asset Approvers and Bypass Approval

- Level 9 and 10

User Level Approvers

- Level 10

Site Level Asset Approvers

- Level 10

Site Level Approvers

- Level 10

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OTHER CONSIDERATIONS

- **Any** level user can be an approver
- Users in approver roles can also have **approvers of their own**
- Approvers are **individual** users
- **Level 9** users can have approvers applied to them
- Level 10 has **bypass** approval by default
- Enforcing Approver **prevents** the user from specifying a different approver

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Restrictions

User Level: 9-Assistant Admin
[Information on user levels](#)

Approver: (No Approver)
Who pages will be submitted for approval to. Individual pages can override this setting.

Enforce Approver
Prevents the user from specifying a different approver. This option applies account-wide.

Access Settings - /athletics

Recursive Modification

Apply All Settings to This Folder Only
 Apply Selected Settings to This Folder and All Enclosed Files and Folders
Recursive modification does not apply to directory variables; directory variables are always inherited.

Access Group: ATH Department
The group with rights to edit this folder.

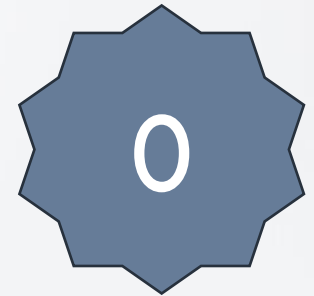
Approver: Athletics Approver (athletics-approver)
Setting an approver overrides all users' approvers for this folder.

Enforce Approver: Yes No

Bypass Approval: (Level 10 Administrators Only)
The selected group can bypass the approval process and publish this folder immediately.

OTHER CONSIDERATIONS

- A frequent scenario is to create **Level 0 users as approvers**
 - Level 0 have very few permissions other than publishing
 - If changes need to take place, the Level 0 user needs to send the page back to the original user to have the edits completed.
- If users have permission to publish but they still cannot, check the **production server settings** for your site



Available To

Everyone



The group with rights to browse and publish to the production server (unless otherwise restricted via an approver or file and folder permissions).

WORKFLOW SCENARIOS

Scenario A: User Level Approver

Marketing Content Editor



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Scenario B: Section Level Approver

Marketing Content Editor



Scenario C: Bypass Approval

Marketing Content Editor



LET'S SEE IT

Questions?

Thank You!

The next Training Tuesday will be
on **June 25th** on

**User Level Up: Seeing the CMS
User Experience at Every Level**

Register now at support.moderncampus.com/training-calendar

Other Upcoming Trainings:

Thursday, June 6th

Monthly Workshop

An open forum to discuss
any topic related to the
entire CMS product line.

Friday, June 14th

CMS Monthly Orientation: Admin Edition

An overview of Level 9 and
10 administrative tasks
including site and account
setup options