

Training Tuesday

Group Approvals & Workflow Overview

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A BIT OF “HOUSEKEEPING”



This webinar is being **recorded** and will be available on our support site



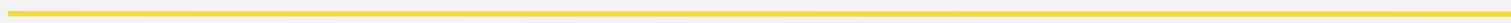
Use the **Q&A** for questions. Feel free to ask during the presentation.



I am working in a sandbox, but you can **follow along** in your own instance



Please complete our **survey** after the webinar



Agenda

- What is Workflow?
- Workflow setup options
- Who can set up approvals?
- Other Considerations
- What's new: Group Approvals
- Demo
 - User Level Approval
 - Section Level Approval
 - Bypass Approval
 - Group Approval
- Managing Approvals
- Q&A

What is Workflow?

Workflow is the process of submitting files to others for approval and publication. Administrators control who can publish on the site by assigning approvers to users or content.



User Level



Section Level



Page Level



Bypass
Approval

Workflow Setup Options

- Examples of each option:

1. A marketing manager or team lead approves all edits made by members of the marketing team
2. The registrar approves all content within the academics section
3. A faculty member can publish updates to their profile page without approval

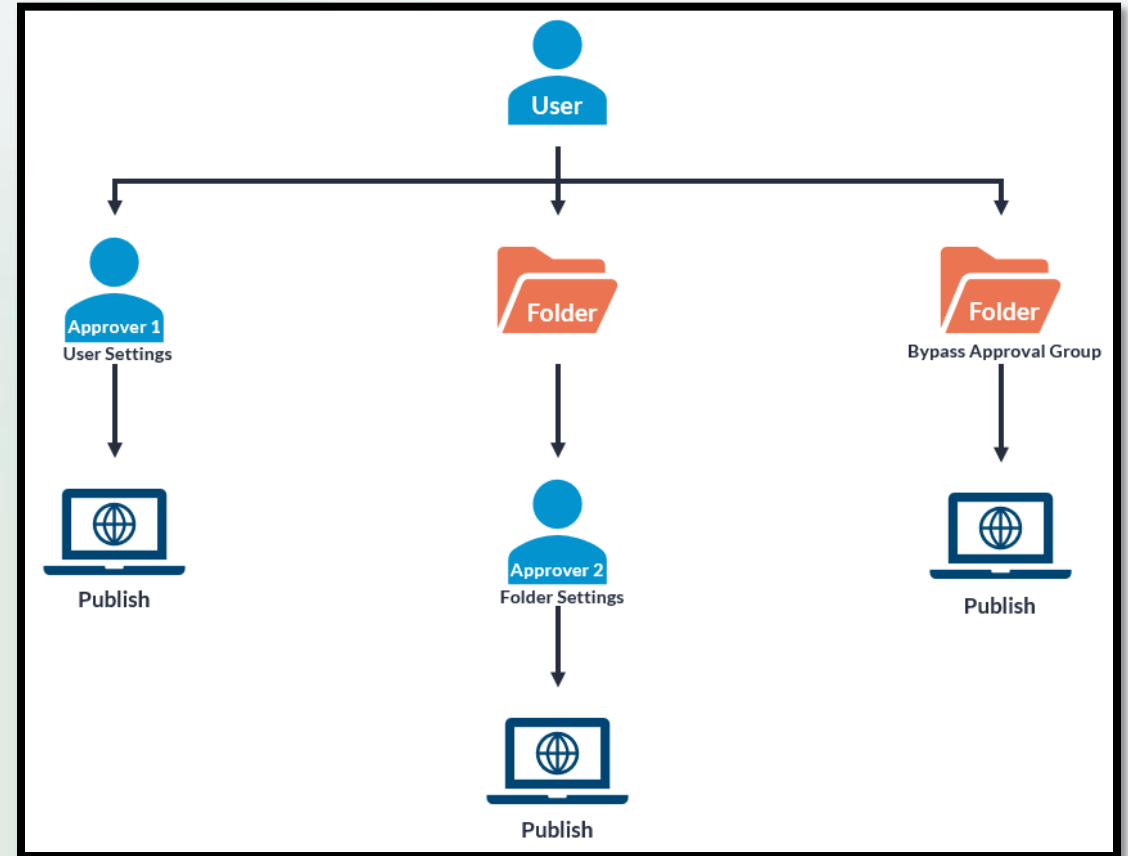
User-Level Approver

Section-Level Approver

Bypass Approval

Workflow Setup Options

- The system supports multiple levels of review and multiple approvers
- A user can pass through more than one workflow
- Settings closer to the content take precedence over user-level settings



Workflow Setup Options

When assigning an approver or bypass approval on a section, 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.

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 ATH Department
The group with rights to edit this folder.

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

Enforce Approver Yes No

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

Who Can Set Up Approvals?

Level 9

- Section, page, and asset approvals
- Can enforce approvers
- Can configure bypass approval

Level 10

- Everything Level 9 can do
- User-level approvers
- Site-Level approvers

NEW: Group Approvals

Allow approval requests to be sent to a group

Other Considerations

- **Any** user can be an approver
- Users in approver roles can also have **approvers of their own**
- Approvers can be **individual** users or **groups**
- **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

Restrictions

User Level Information on user levels

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 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.

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 should decline the page so the original user can make the necessary edits
- If users have permission to publish but they still cannot, check the **production server settings** for your site
 - Bypass Approval **does not override** this setting

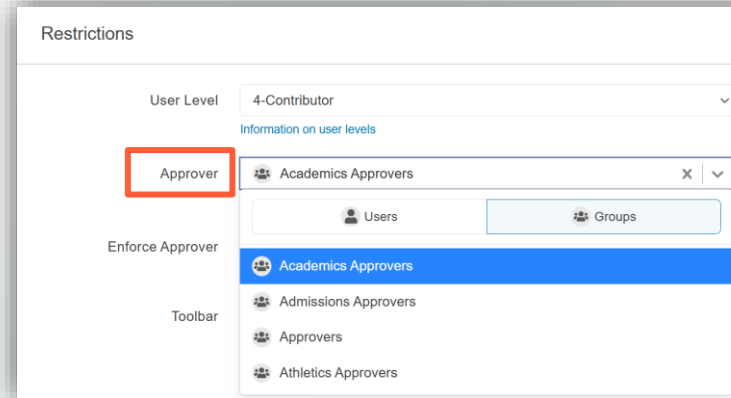


Available To 

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

What's New: Group Approvals

- Assign approvals to a **group** instead of an individual
- Determine whether a group can be used for workflows in **Setup > Groups**
- All group members are **notified** when content is submitted
- Any **one member** of the group can approve and publish



Restrictions

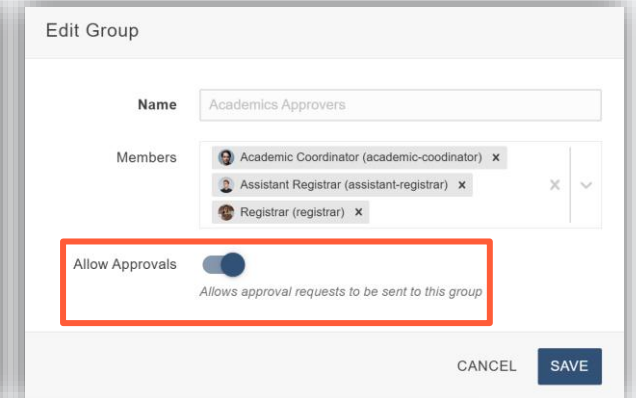
User Level: 4-Contributor

Information on user levels

Approver: Academics Approvers

Enforce Approver: Academics Approvers

Toolbar: Admissions Approvers, Approvers, Athletics Approvers



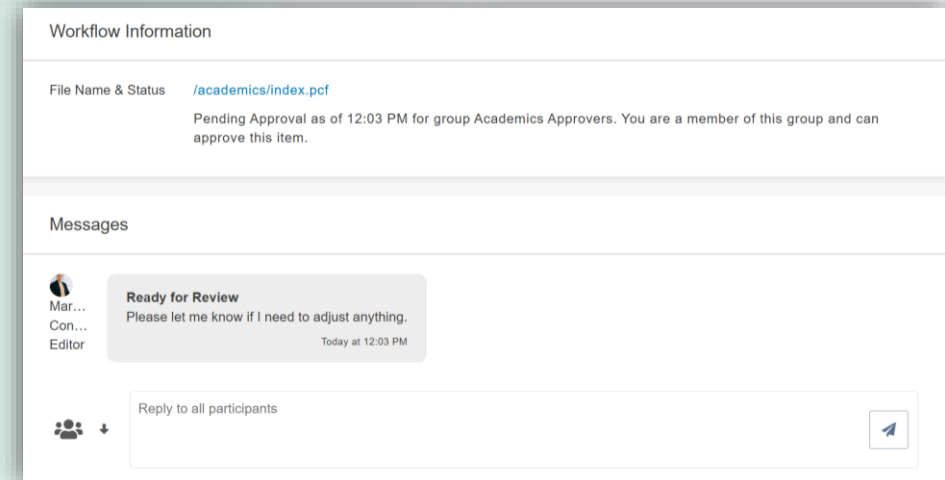
Edit Group

Name: Academics Approvers

Members: Academic Coordinator (academic-coordinator), Assistant Registrar (assistant-registrar), Registrar (registrar)

Allow Approvals: *Allows approval requests to be sent to this group*

CANCEL SAVE



Workflow Information

File Name & Status: /academics/index.pcf

Pending Approval as of 12:03 PM for group Academics Approvers. You are a member of this group and can approve this item.

Messages

Mar... Con... Editor: Ready for Review. Please let me know if I need to adjust anything. Today at 12:03 PM





Reply to all participants

What's New: Group Approvals

- The **Pending Approvals and Custom reports** will display approval groups
- Workflow items under Dashboard are now categorized as **Pending and Completed**
- The concept of **archiving** a workflow item for a given user **has been removed**
- Workflow items **complete automatically** for every user when it is approved, declined, or canceled

Pending Approvals (2) EXPORT CSV

Filter

File	From	Approver	Modified Date
 /academics/index.pcf	Marketing Content ...	 Academics Appro	4/16/26, 12:03 PM
 /athletics/tickets.pcf	Athletics Editor	 Athletics Approver	4/16/26, 10:31 AM



Groups Report Options

- Select All
- Group Name
- Member List
- Allow Approvals

Users Report Options

- User Level
- Approver (User)
- Approver (Group)
- Toolbar
- Group Membership

WORKFLOW

-  **Pending**
-  **Completed**

Workflow Scenarios

Scenario A: User Level Approver



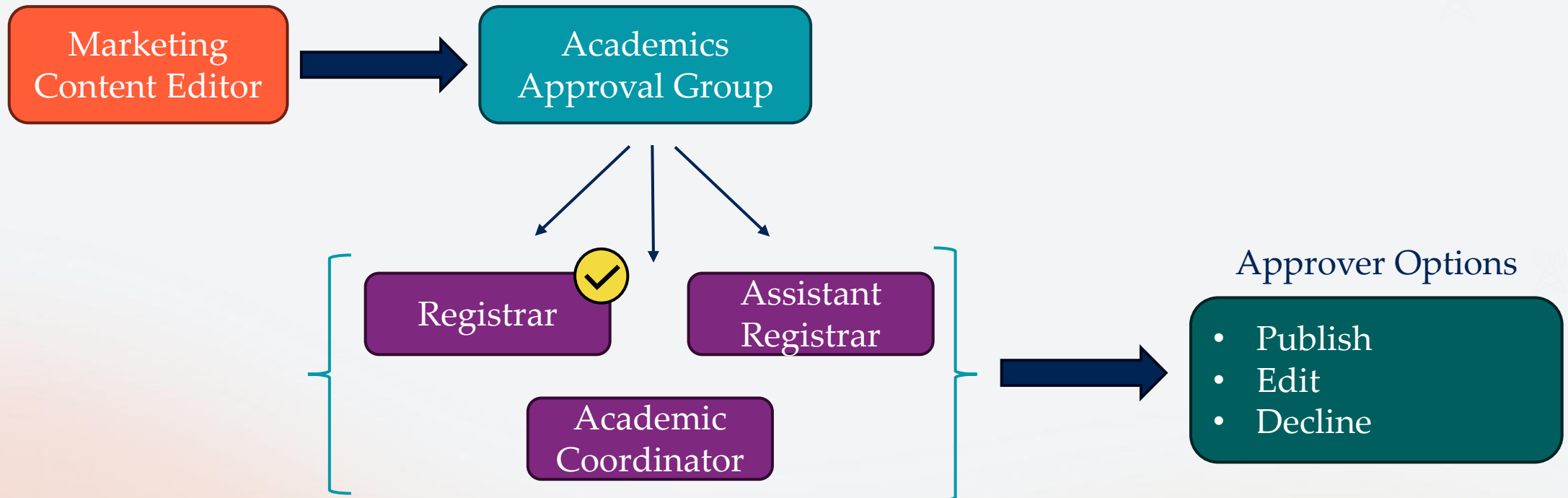
Scenario B: Section Level Approver



Scenario C: Bypass Approval



Workflow Scenario – Group As Approver



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Q&A

Post-Webinar Survey

- 2 minutes
- We love knowing what you like or would like improved!

* 4. On the following scale, how **helpful** and **informative** was the training *webinar?*

1 - Not Helpful 2 3 - Neutral 4 5 - Helpful

Additional comments to reflect your score.



Scan for a two minute
feedback survey

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The next Training Tuesday will be on

Tuesday, May 26

SEO Basics in Modern Campus CMS

Registration is now open!

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Thank you!