



**SUBMITTING YOUR PAGE THROUGH WORKFLOW
HENRY FORD HEALTH SYSTEM | SITECORE 9**

Sitecore's Workflow

Definition

A workflow is a series of predefined states that reflect the work processes and procedures for creating web content in your organization. For example, your workflow states could correspond to the creation, review, and approval stages that items must go through before they are published on your website (Source:

https://doc.sitecore.net/sitecore_experience_platform/content_authoring/managing_items/workflows/workflows_and_the_workbox).

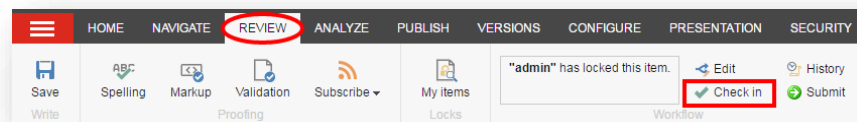
HFHS Configuration

Depending on the level of access that your role allows, your predefined states are:



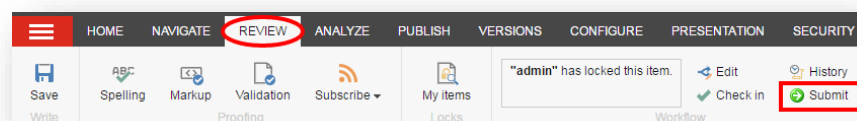
Draft – newly created or edited page that has not yet been submitted for review & publish

- When you **Check in** a page to the workflow, it stays in **Draft**

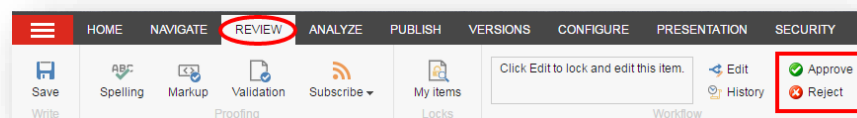


Awaiting Approval – page submitted for review & publish awaiting approval

- When you **Submit** a page to the workflow, it updates to **Awaiting Approval**



- **Approve** – an approved page is staged for publishing
 - You must select Edit to Approve or Reject.
- **Reject** – a rejected page is sent back to **Draft**
 - You must select Edit to Approve or Reject



Note - An approved page is staged for publishing and changes will be automatically updated on the website. Users don't need to manually publish the page.

Items that Don't Have Workflow in Sitecore

The following items don't have workflow in Sitecore, so these items **must be manually published** to use them on the content pages and make them appear on the website.

- Cloned Pages – Each **Selected** website location in the **Clone Destinations** field (Henry Ford, HFPN, Med-ed) must be published individually from its cloned location for it to appear on its live site, e.g., News, Locations, Physician Directory module pages
- Media items – images and files
- Design items – renderings, layouts and templates
- Global Items – All items in global folder do not have workflow and need to be manually published, e.g., Callouts, List Manager items, Hero banner, Notification CTA...
- Forms (Web Forms for Marketers)
- Folders – Anywhere a folder is created in Sitecore it must be published before its contents appear on the live site, e.g., News, Blog, Calendar, Global, Media Library...
- Blog – All blog pages have to be published manually as the workflow doesn't auto publish the changes on the website

When to Publish the Parent Item Manually

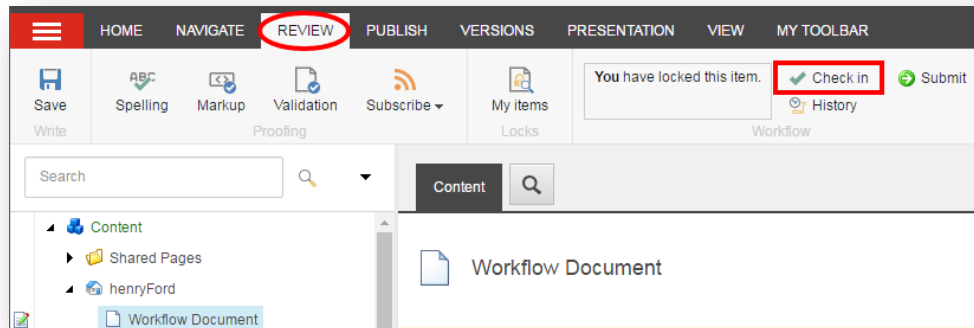
In the following instances, the associated parent item must be manually published with the subitems checkbox checked. Users still have to approve the page(s) in workflow before publishing the parent item.

- Changes to section architecture
 - Deleting subpages
 - Moving / Reorganizing the subpages in architecture
- Calendar – Publish the Event Topic (parent item) after the Event Sessions (subitems) are created or deleted in order to see the full changes on the website.
- News – Publish the month folder (parent item) when deleting old news articles in the associated month.

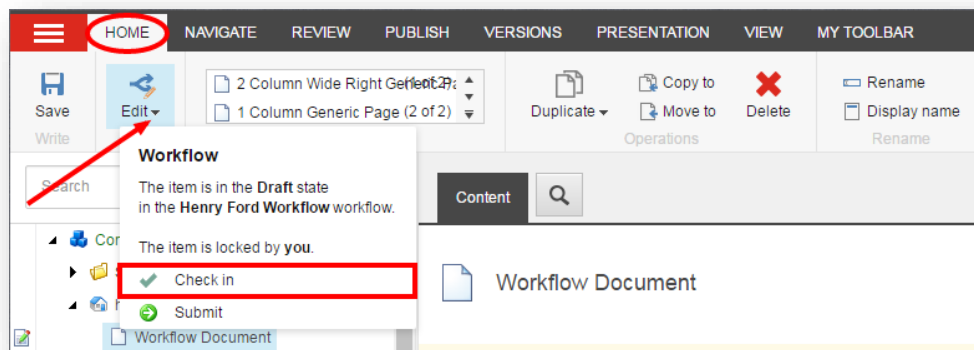
Saving a Page as Draft

For Roles: CMS Content Editor, CMS Administrator

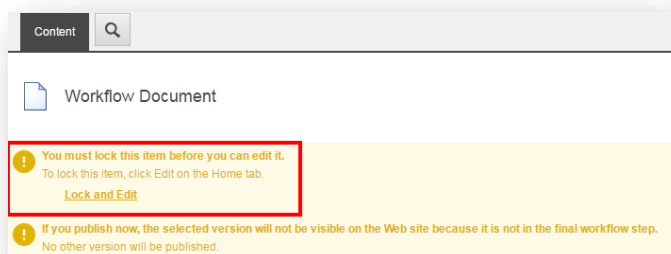
1. Finish editing your page, **Save**, and then do one of the following:
 - a. Access the **Review** ribbon and click **Check in** in the **Workflow** section.



- b. Access the **Home** ribbon, click the down arrow in the **Edit** button, and then select **Check in** from the dropdown menu.



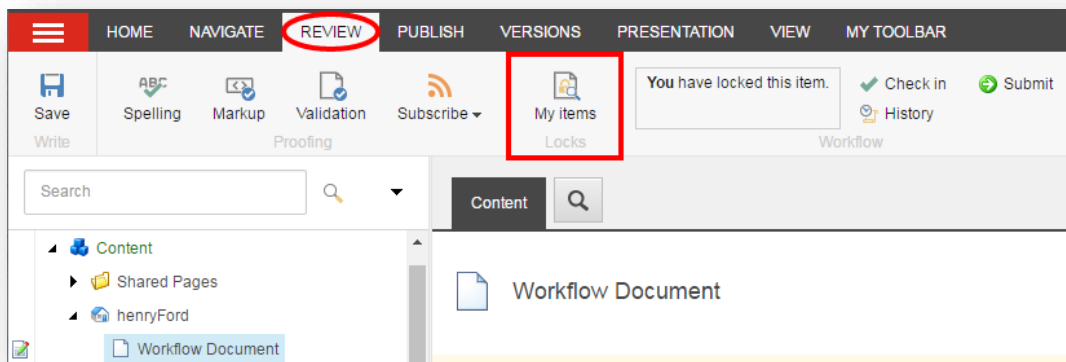
2. If the **Check in** is successful, the page will no longer be locked to your account and you should see the following message in the content pane.



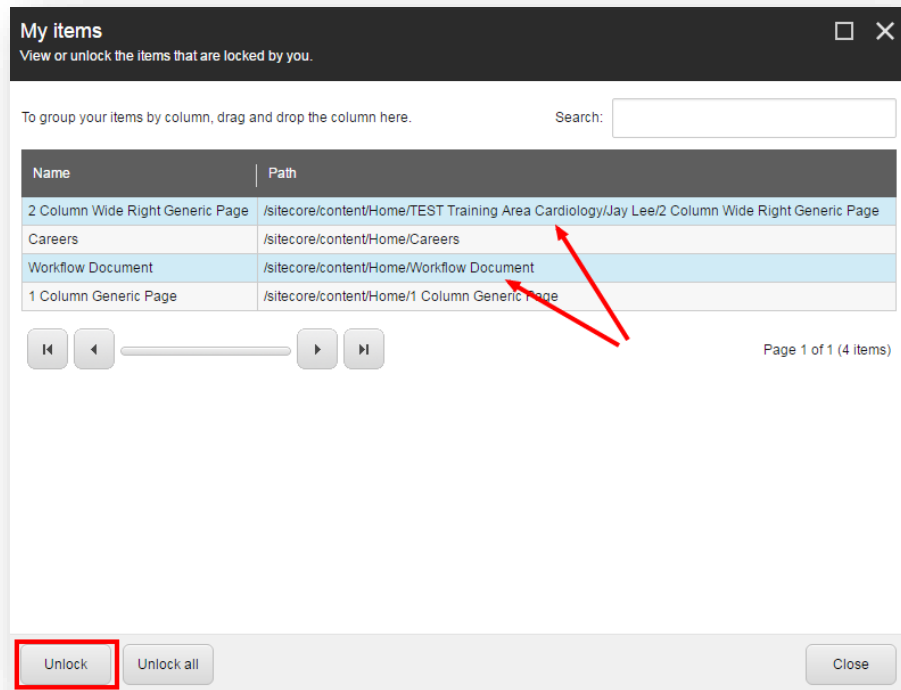
Check In Multiple Pages

For Roles: CMS Content Editor, CMS Administrator

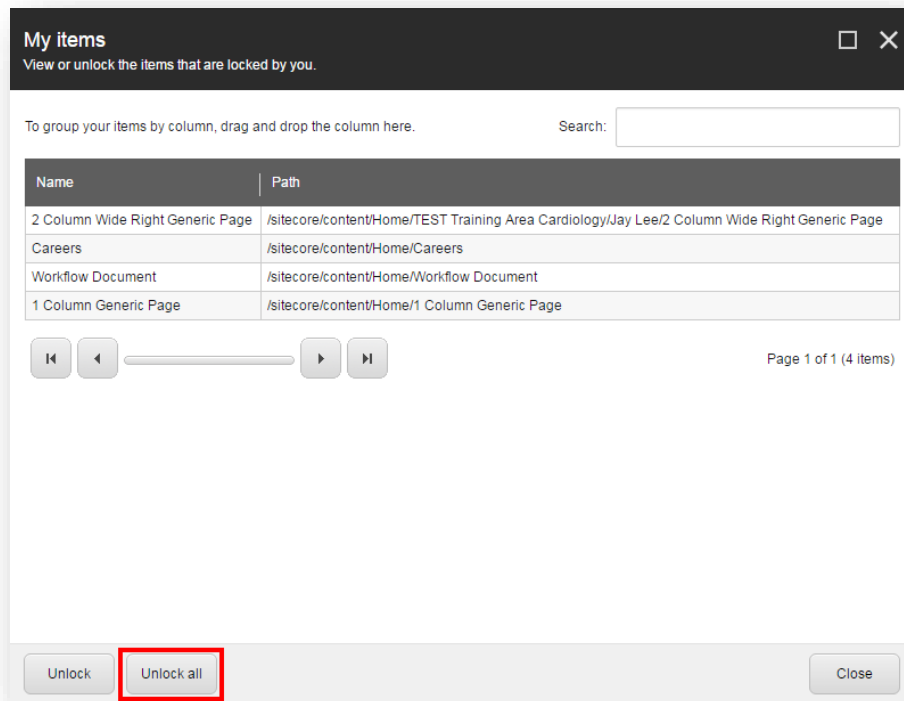
1. Access the **Review** ribbon and click the **My Items** button in the **Locks** section.



2. From the My items window, you can do one of the following:
 - a. Select one or multiple pages (select items while holding down **Ctrl** on your keyboard) and then click the **Unlock** button.



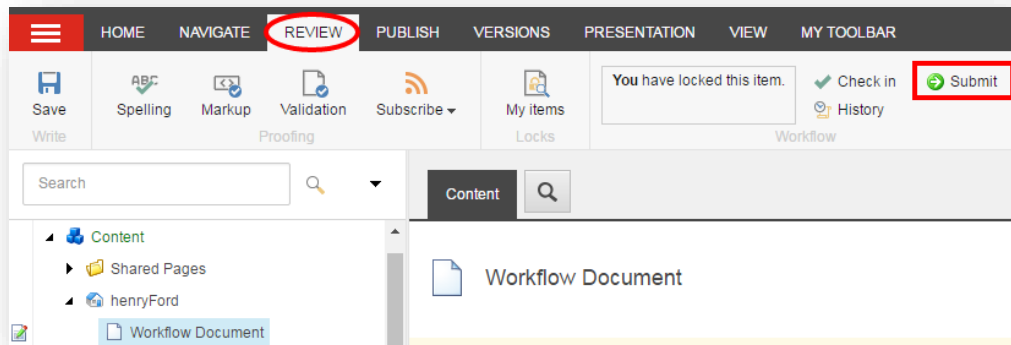
b. Click the **Unlock all** button to unlock all the pages on the list.



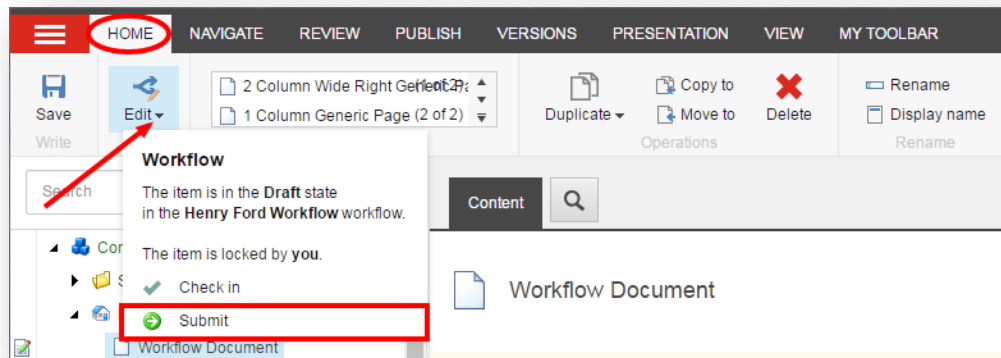
Submitting a Page for Approval

For Roles: CMS Content Editor, CMS Administrator

1. Finish editing your page, **Save**, and then do one of the following (a page is checked in when submitted):
 - a. Access the **Review** ribbon, and click **Submit** in the **Workflow** section.

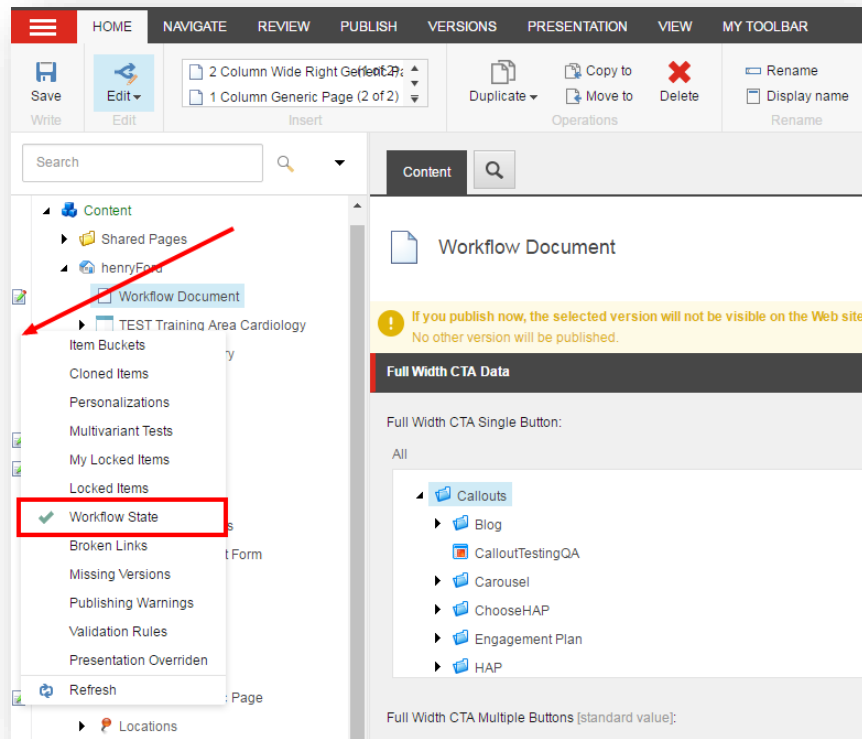


- b. Access the **Home** ribbon, click the down arrow in the **Edit** button, and then select **Submit** from the dropdown menu.

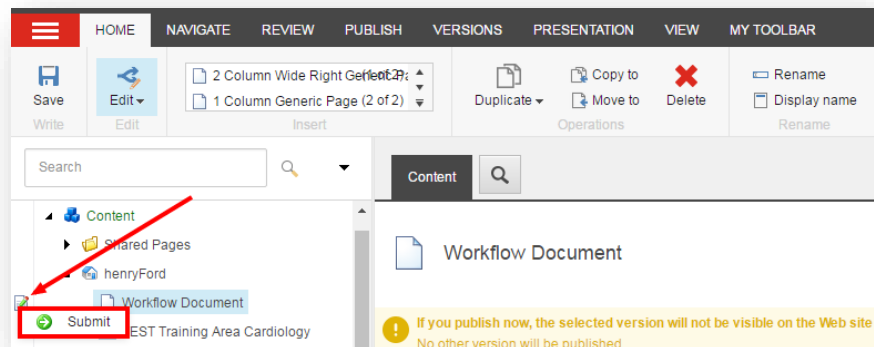


c. Use the hidden menu:

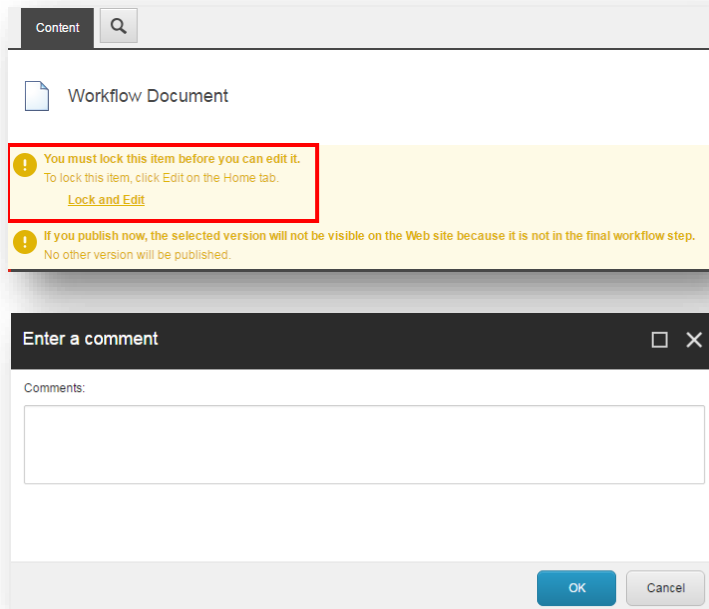
- i. Access the Content Tree's hidden menu by right-clicking inside the thin gray line on the left side of the content tree and then select **Workflow State**.



- ii. Click the draft icon to access its menu and then select **Submit**.

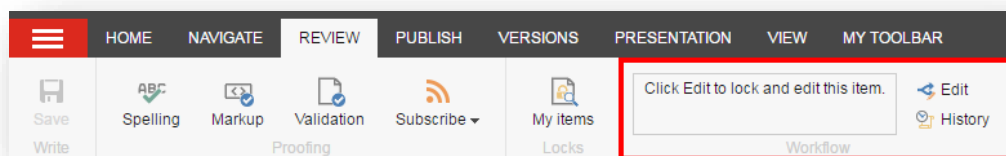


2. If the **Submit** is successful, the page will no longer be locked to your account and you should see the following message in the content pane and the **Enter a comment** window will appear. Always leave a comment for the reviewer.

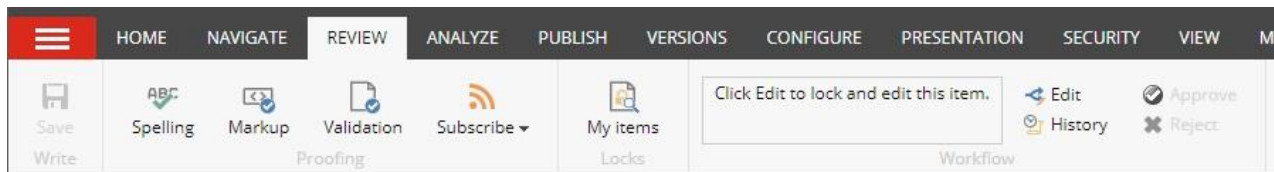


3. Depending on your role, you should see the following:

- **CMS Content Editor** – **check in** or **submit** should no longer be available



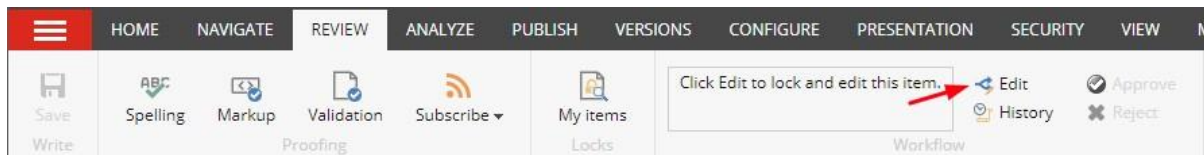
- **CMS Administrator** – **approve** or **reject** will appear, but they will remain disabled until the steps found in the next section are followed.



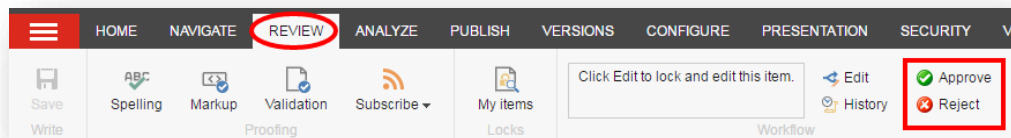
Approving a Page for Publish

For Roles: CMS Administrator

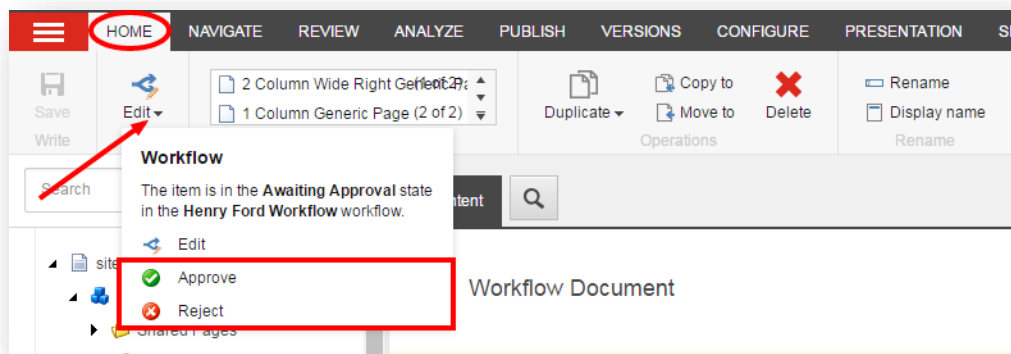
1. To **Approve** or **Reject** a page that is in the **Awaiting Approval** state, take the following steps:
2. Access the **Review** ribbon, click **Edit** to enable the Approve or Reject Button.



- a. Choose from the **Approve** or **Reject** from the **Workflow** section.

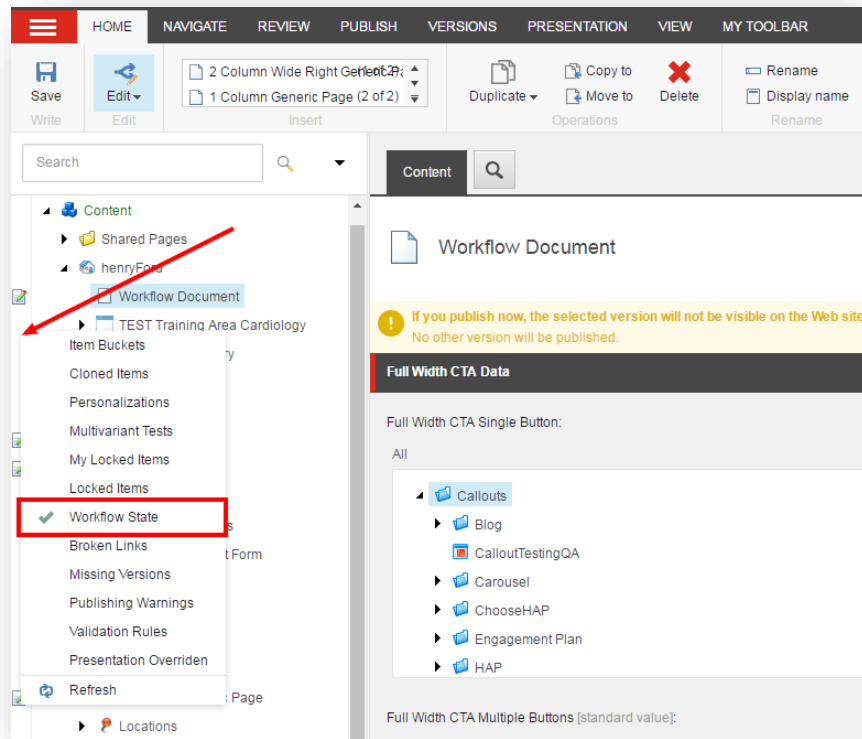


- b. Access the **Home** ribbon, select click the down arrow in the **Edit** button, select **Edit** and then select **Approve** or **Reject** from the dropdown menu.

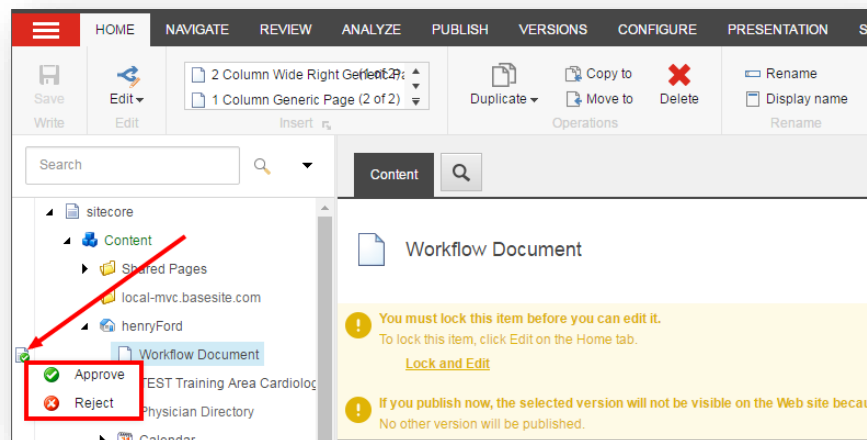


c. Use the hidden menu:

- i. Access the Content Tree's hidden menu by right-clicking inside the thin gray line on the left side of the content tree and then select **Workflow State**.



- ii. Select **Edit** for the item you want to approve or reject, then select the awaiting approval icon to access its menu and then select **Approve** or **Reject**.

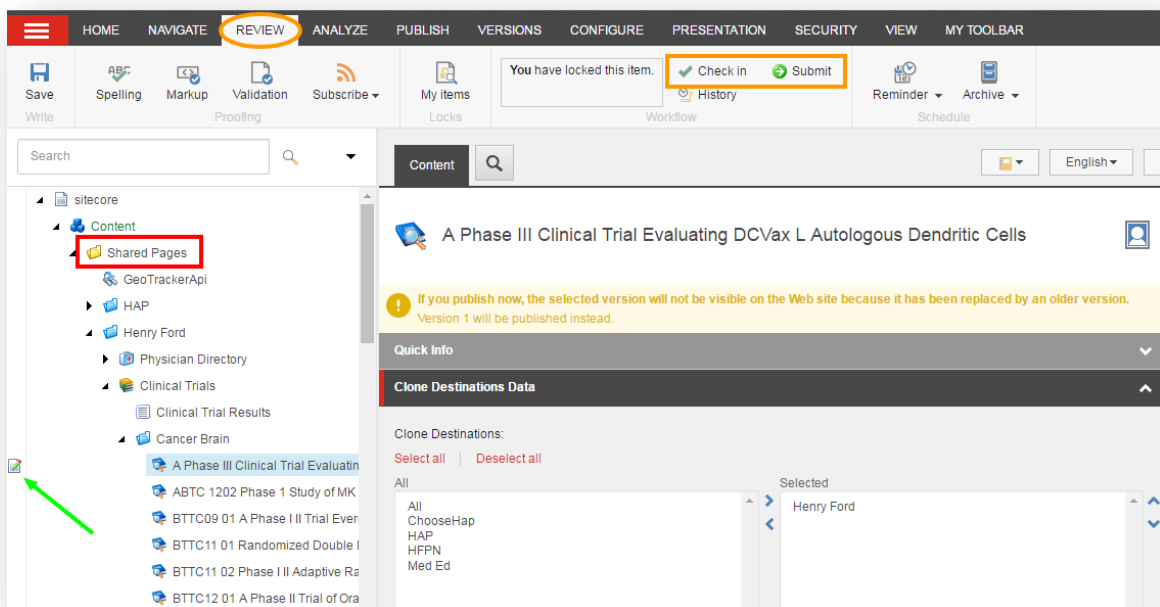


Workflow for Multisite Pages

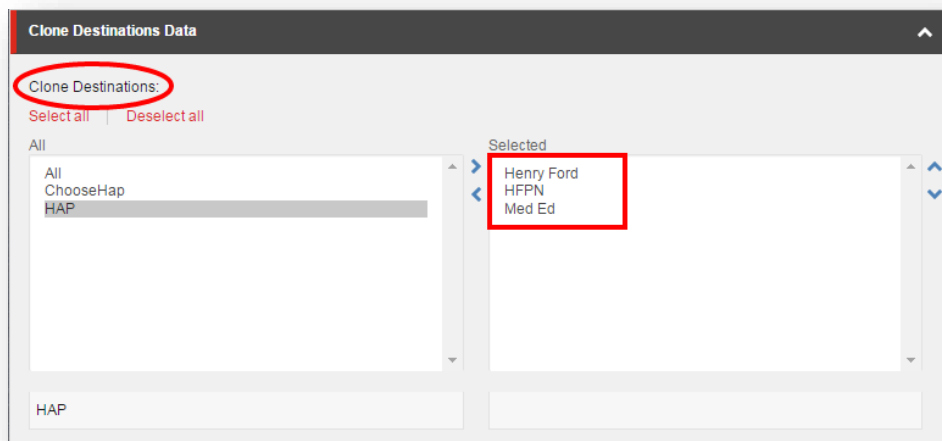
For Modules: News, Locations, Physician Directory

For Roles: CMS Content Editor, CMS Administrator

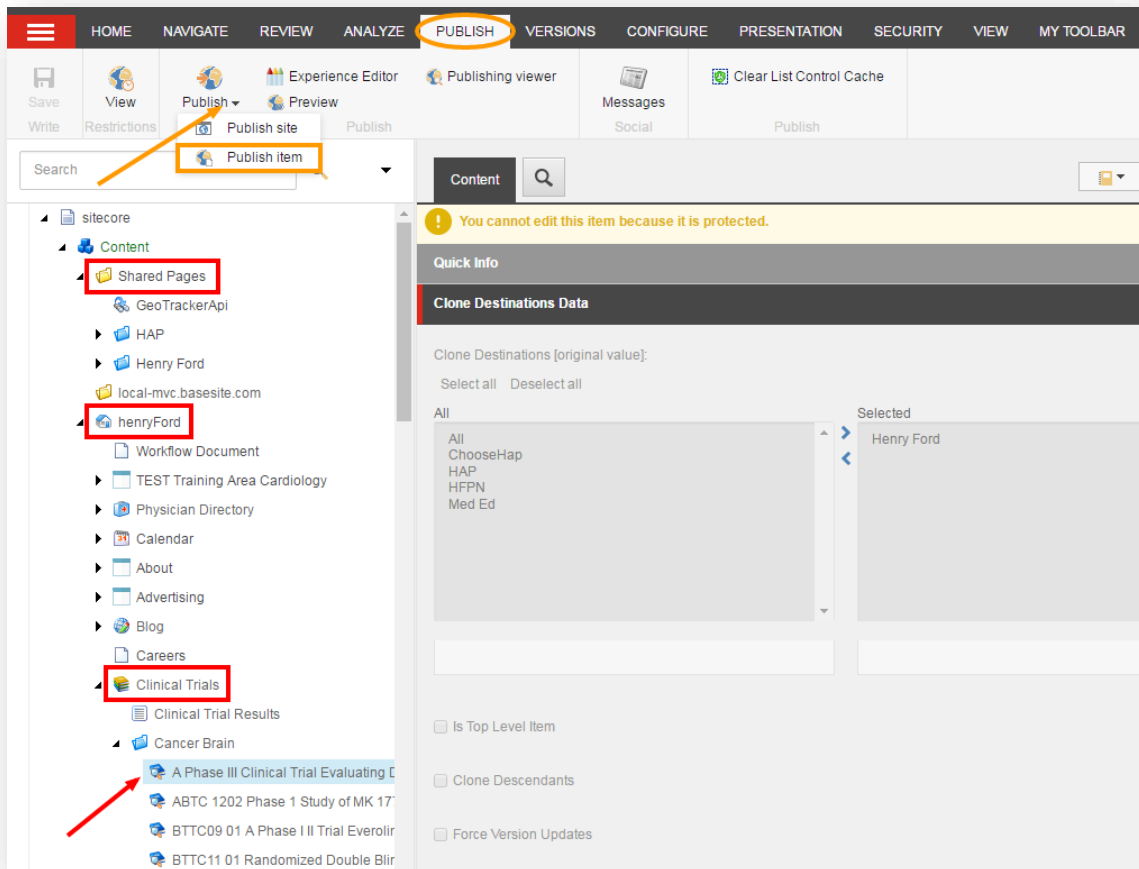
1. Always start from the multisite module (**Shared Pages** – noted in red) and then follow the same workflow process presented in this document for the original page source by using the **Review** ribbon (noted in orange), content tree's hidden menu (noted in green), or the **Edit** button in the **Home** ribbon (not shown).



2. **IMPORTANT!** – Each **Selected** website location in the **Clone Destinations** field must be published individually from its cloned location for it to appear on its live site.



3. Select the cloned item under the appropriate website tree (noted in red) and then access the **Publish** ribbon (noted in orange). Click the down arrow on the **Publish** button and then select **Publish Item** from its dropdown menu.



How to Publish Your Page

When you edit or create new items in Sitecore, they must be published before they appear on the website. This lets you save unfinished items and decide exactly when the items are launched to the website.

When you work in Sitecore, the items you save are saved to the Master database. When you publish new items or updated items, the items are copied from the Master database to a publishing target, and from the publishing target, the website is launched. The default publishing target in Sitecore is the Web database.

You can choose to publish the entire website or a single item:

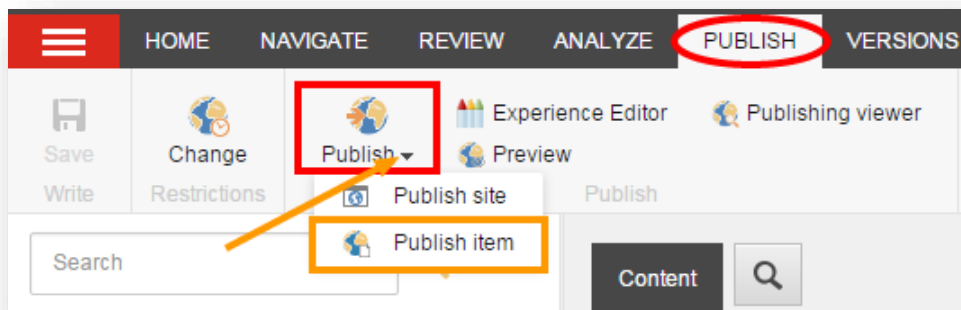
- Site publishing – publishes your entire website starting from the root of the content tree. You can publish a site from the Content Editor or from the Sitecore Desktop.
- Item publishing – publishes the item you select in either the Content Editor or the Experience Editor. The item can only be published if all its ancestors have been published. With item publishing, you can choose to include all of the selected item’s subitems and related items.

When you are ready to publish an item to your website, you can run the publishing wizard, which guides you through the steps of publishing in Sitecore. You can run the publishing wizard from the Content Editor and the Experience Editor.

Note: If you publish a new child item individually, the associated parent item must be published first.

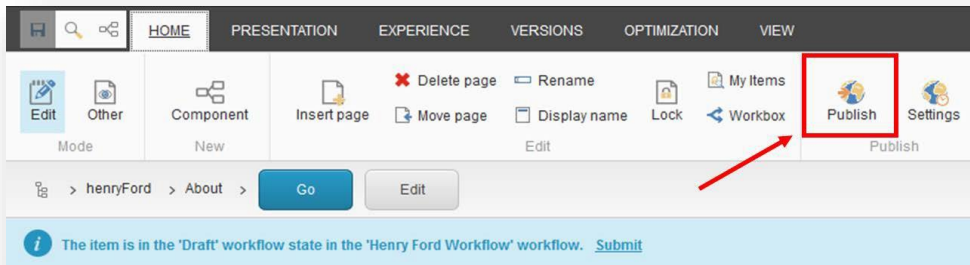
From the Content Editor

1. Select the item or page that you want Publish, open the **Publish** ribbon and then click the **Publish** button (in red) or click the down arrow, and then select **Publish Item** from the drop-down menu (in orange).



From the Experience Editor

2. Open the **Home** ribbon and then click the **Publish** button



3. To publish a single item:

Publish Item [Close]

Select the relevant publishing settings for the item.

Publishing

☒ Smart publish - publish differences between source and target database.
☐ Republish - publish everything.

☐ Publish subitems
☐ Publish related items ⓘ

Publishing language

☒ Select all
☒ English

Publishing targets

☒ Internet (web)
☒ Public (live)

[Publish] [Cancel]

- **Smart publish** – publishes the selected item if it has changed since the last publication. When you run Smart Publish, the selected item in the Master database is compared with the equivalent item in the target database and, if the item has changed, it is published. When you are publishing single items, Smart Publish is a quick way to make sure that all changes to a specific item and its subitems are published.
- **Republish** – publishes everything. Republish overwrites the selected item in the target database with the equivalent item from the Master database – even if it has not changed. In this way, all obsolete versions are removed from the target database. You can use republishing to restore a backup of the master database and to add a new content language, a new publishing target, or other system items.
- To publish all the subitems of the selected item, select **Publish subitems**. However, it is recommended that you don't do this if there is a very large number (more than 20) of child pages under this parent page.

- To publish all the related items to the selected item, select **Publish related items**. It is **generally recommended that you refrain from using the Publish related items checkbox as it puts strain on the system**.
- In the **Publishing language** section, specify the language versions that you want publish.
- In the **Publishing targets** section, specify where you want to publish the items to.
 - Public (live) must be checked for content to appear on the live site.
- Click **Publish**. When the publishing completes, you can see how many items were processed during publishing and the number of items that were created, deleted, or updated on the target database.