

How to Create Workflow Rules

You can set-up a review process and workflows to easily track an article from the time it's first created to the multiple review cycles it undergoes, right up to the time it is published.

A typical workflow can have 4 to 5 statuses :

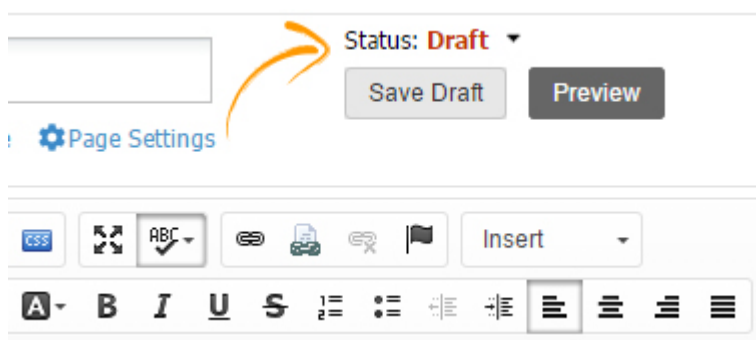
1. [Draft](#)
2. [In Progress](#)
3. [Ready for Review](#)
4. [Custom Status](#)
5. [Published](#)

Why use workflows?

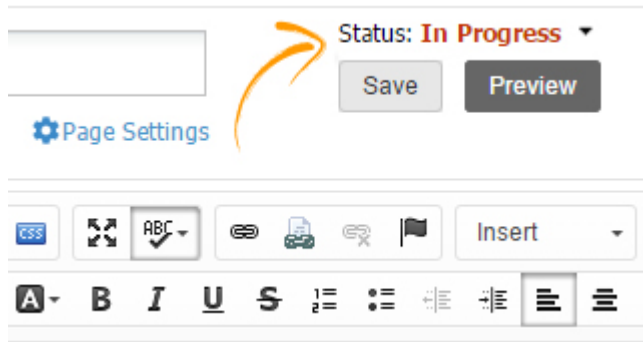
You can use the workflow rules and approval processes to ensure the content in your knowledge base articles is relevant, accurate and helpful. Workflows help your organization automate the task of managing work collaboratively with a team of contributors, editors and administrators.

5 key workflows statuses explained

1) Draft - This is the default status of an article as soon as you create a new page. The draft page is not visible to readers and you can use it to outline your ideas and create a working draft of the article.

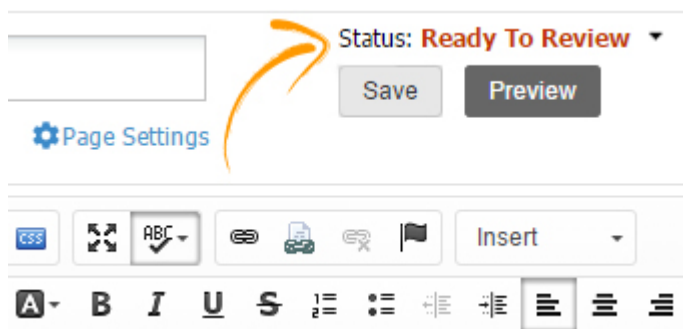


2) In Progress - Mark the status of an article as "In Progress", if it is still being created but is more than just an outline. During this stage, you can brainstorm with your colleagues and include their ideas into the article.

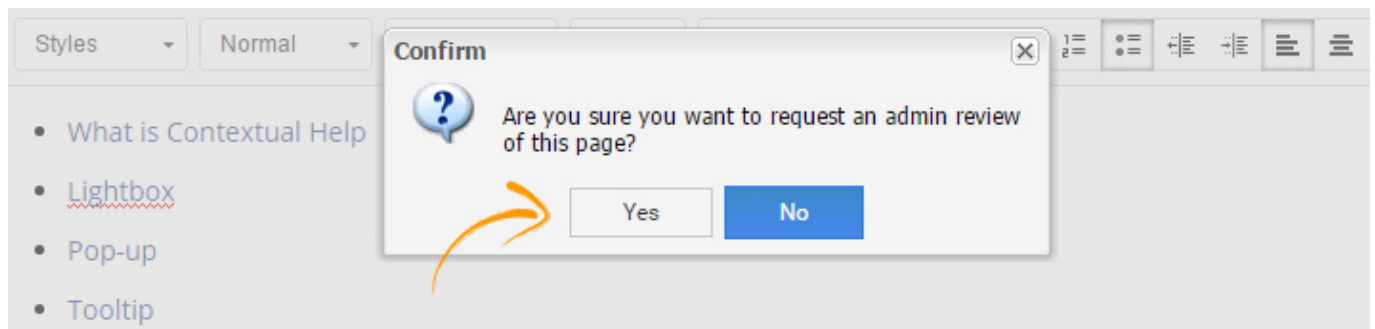


3) Ready for Review - Once you're done creating the article, you can request the administrator for a review by changing the status to "Ready for Review".

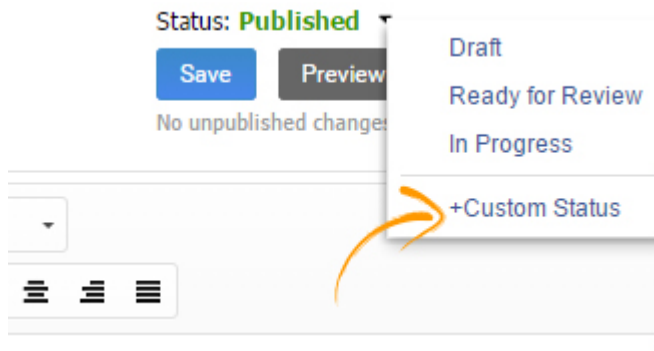
Note* - As soon as you change the status of an article to "Ready for Review", then a notification is automatically sent to the administrator .



You will be prompted to confirm the request for a review from the admin. Select "Yes" to confirm your request.



4) Custom Status - You can also create a custom status for articles and pages by clicking on Custom Status. This is where you can use workflow rules in tandem with the [member manager](#) function, and assign/request contributions or reviews from an individual member or entire groups/teams.



A custom status is basically one that is not a pre-defined status such as "Draft", "In Progress", "Ready for Review" or "Published". For instance, you can mention the name of a specific team or a member from whom you want the page to be reviewed, as shown in the example below.

Custom Status

▼ ✕

[+ Add New Status](#)


Note : Write a custom status in the left box and choose a group member from the adjacent box to notify the selected member via email.

Add the status and assign it to a member or team






Click on Save









5) Published - This is the final stage where the administrator reviews and publishes the help article so that it's available for the target audience.

Status: **Published** ▾

[Page Settings](#)  [Save](#) [Preview](#)

No unpublished changes

[CSS](#)  [ABC](#) ▾     [Insert](#) ▾

A ▾ **B** *I* U ~~S~~        

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