

Creating a Workflow

Requires

CONTENT FLOW

Creating a Workflow

Prompt

Learn how to create a new Content Flow [workflow](#) from scratch.

Outcome

After installing Content Flow, your next task is to create a new workflow. This guide walks you through the steps needed to get up and running.

Steps

Navigate to the Available Workflows

From any page in the space where you want a [workflow](#), open the [Confluence Sidebar](#). Next, click the "gear" icon that says "Space Tools" (note: it is in the lower left corner of the screen). From the Space Tools menu, click on "Content Tools". This will take you to the space backend. Here, find and click the tab called "Apps" (at the far right-side of the list of tabs).

The "Apps" tab opens up a new set of sub-tabs, one of these is called Available Workflows. Here you can create a new workflow or see the existing workflows that are available for use in this space.

Name	Type	Visibility	Pages	Reviewers	Labels	Automatic	Actions
Content Review	Publishing	This Space	0	Editor, designers, Kelli			🔍
My Publishing Workflow	Publishing	All Spaces	0	Editor, Dave, Andy	Workflow Label		🔍
Page Preview	Publishing	All Spaces	0	Editor			🔍

+ Workflow

Add a New Workflow

Under the list of available workflows, click the "+Workflow" button to add a new workflow.

Describe the Workflow

A new workflow menu opens, called the Workflow Wizard. There are two tabs in the Wizard. The first tab defines the workflow, including its name, type, visibility, and initial label. For type, you can choose either a [Routing Workflow](#) or a [Publishing Workflow](#).

Define Workflow

Configure Workflow

Name ⓘ
A descriptive name for this workflow

Publishing
Page changes will be published on completion of workflow

Visibility
Where this workflow can be used

Removable By
Restrict ability to remove active workflows from pages to space administrators and this user or user group.

Labels

Comma-separated list of labels applied to a page while the workflow is applied

Enter the details about your workflow in the first tab and then click the second tab to add steps.

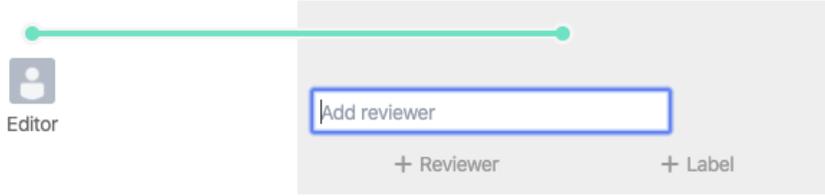
You can also specify an individual user or group who can remove the workflow once it has been initiated. Simply enter a username or group into the "Removable By" field. This ensures additional control over the content creation process.

Add Steps

The second tab defines the [workflow steps](#). Each step corresponds to a reviewer (or group of reviewers) and label.

Define Workflow

Configure **Workflow**


A workflow diagram showing a single step. On the left, a green line connects a person icon labeled "Editor" to a grey box representing the step. Inside the step box, there is a text input field with "Add reviewer" and a "+ Reviewer" button below it. To the right of the input field is a "+ Label" button.

Empty steps will be removed.

To add a step, click the "+Step" button. To add a [reviewer](#), click "+Reviewer" and start typing an individual user or group, then select the name from the drop-down list. You may add multiple reviewers to any step, just click the "+Reviewer" button again and add another individual or group.

To add a label, click the "+Label" button. Enter the label name and press the "enter" or "return" key on your keyboard to save the label into the step.

To add another step, simply press the "+Step" button.

Save

When finished adding information and steps, press the "Save" button.

That's it!

Note



When there are **multiple reviewers** in a step, the following behavior occurs:

- If there are only individuals, then **each** of the individuals must click approve for the step to advance
- If there is a combination of individuals and groups, then **each** of the individuals and **any** member of the group must click approve for the step to advance
- If there are only groups, then **at least one** member of each group must click approve for the step to advance

Tip

Warning

Info

Related

- [Editing a Workflow](#)
- [Applying and Advancing a Workflow](#)
- [Workflow Status Macro](#)
- [How to Use Labels and Macros to Track Work](#)