Any time a page is created or edited, it must pass through a workflow process before being added to the live website. This document will walk you through the steps of how that process works.

**Editing an Item**

An advantage to using workflows in sitecore is that the process automatically generates new versions of a page that you are editing – archiving the previous version. For any page that you have selected in the tree, if you look all the way to the right of the main (large) content window, you will see a number showing what the version is of the page you currently have selected. Clicking on that number will display some basic information on the versions listed.

The moment you click on the “Edit” button (which locks your page and allows you to edit it) a new version is automatically generated.
You will now see the following message at the top of the content window.

What this means is – the new version that you are now working on will not be published until it is approved. In the meantime, the previously approved version will be the published version on the live site.

**Submitting Your Edits**

Once you have made **and saved** your edits, you will need to submit them into the workflow. To do this, click on the small arrow next to the word “Edit” in the toolbar to bring down the edit dropdown.

The dropdown shows that this page is in the Draft state in the Simmons Standard Workflow and that is currently locked by you.

Click on “Submit” to send it to the workflow. Clicking submit also checks the page back in.

**Please note** that while a page is awaiting approval it is **locked from editing**. Once an edit is approved or rejected, the page will once again be accessible/editable.

**The Sitecore Workbox**

Although you can submit each page as you work on them, there may be times when you have multiple pages you are working on and do not want to submit them until you are finished with all your edits.

Rather than going back through each page and submitting it through the Edit button – the **SiteCore Workbox** allows you to review everything you have in draft AND submit everything at once.
When you log into Sitecore, you are automatically placed into the Content Editor. In the lower left corner of your screen there are links that will allow you to switch over to the media library or to the Workbox.

Once in the Workbox, you’ll want to make sure that “Simmons Standard Workflow” is checked. You should only have to check this once.

Under “Drafts” you will see all the pages you’ve edited that you have not submitted yet. From here you are able to preview the page, open it to make additional changes, review what the differences are (if this is a new version to an existing page) and submit your page. You can also select (via checkbox) multiple pages to submit, or submit all of your drafts.

Once you’ve submitted your drafts, your workbox should be empty. Your changes have now gone to the approver to review/approve for publishing.
Approving Edits

If you are in a role that currently approves changes, you would do this also through the workbox. If you have pages that need to be approved, they will be below the Drafts section – in the “Awaiting Approval” section. Similar to drafts, you will see who made the edit and on what date. You can preview it, see what the difference is, open it, approve it or reject it.

There is also a “More” button/link that, when clicked on, shows the workflow steps through which the page went.

If you click “Approve” for this page, it will automatically published. If there were any images or documents that were created and added to this page – they will also be published.

Rejecting Edits

If you notice something wrong with the edits made, you can open it and fix it before approving it – or you can reject it, which will revert it back to a draft.

The original author will not be automatically prompted that their edit has been rejected. Please contact the author and let them know that they will need to make further edits.
Dealing with Rejection

Nobody likes to be rejected – but sometimes it happens. You might have submitted a change to be approved – and it doesn’t get approved. Worse, it gets rejected. How do you know? What do you do?

Currently, we do not have notifications set up in our workflow. If things are submitted, it is up to the approvers to check throughout the day to approve/reject changes. Similarly, editors should check their workbox out a few times a day as well.

If you know you submitted something earlier – and find that it is back in your drafts, your changes were rejected for some reason. Our office will email you directly to let you know that your page is back in draft status.

From the workbox, you are able to open and edit the page right there. You can then save and submit it again, or save it and submit it from the workbox at another time.

Once the fix is submitted and approved your change will go live!

For any questions related to the workflow, to Sitecore, or to the Simmons web site in general, please email webmaster@simmons.edu.