Customizing Discussion Forums with Workflow Processes and New Commands

SiteScape Forum
SiteScape WebWorkZone

Product Version: SiteScape Forum, Version 7.1
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About This Manual

This chapter provides information about using this manual.

Audience

This manual is intended for Forum managers who want to track routine work procedures automatically and check the progress of any one procedure with a quick glance.

You do not need programming experience to use this manual, but you should be familiar with the basic tasks of using and managing a discussion forum. (For more information, see the *User Guide* and *Getting Started Guide for Managers* PDF files.)

Summary

This manual provides examples and step-by-step instructions for planning, creating, using, and modifying workflow processes and new commands.

Chapter	*Description*
Overview	This chapter provides a background for the entire manual by defining workflow processes and commands and describing the user interface.
Example: Reviewing a Document	This example scenario shows how several different users can take turns performing specified actions on an entry to move it through a workflow process.
Creating a Command	Step-by-step procedures describe how to create a new command for the **Add** menu in a discussion forum.
Creating a Workflow Process	This chapter contains step-by-step instructions for planning the workflow, adding states, creating state transitions, adding a workflow question, setting access control, and setting e-mail notifications.
Connecting the Command with the Workflow	This chapter describes further steps to complete the customization, including associating the command with the new workflow process. After you do this, users initiate the workflow automatically every time they use the command.

Chapter	*Description*
Getting Feedback and Making Revisions	Examples of adjustments and revisions illustrate the importance of keeping the workflow process and the command closely aligned with the work users are doing, even as that work shifts or changes.
Next Steps	This chapter provides a brief description of the more sophisticated customizations available to you when you use templates or object overloads.

Conventions

What you see	*What it means*
Click **Tools**. Click **Text box**. Click **Administration**. Click **Close**.	References to toolbar items, links, menu items, buttons, and state and workflow names appear in **bold** font.
Type `Draft`, then press Enter. Open the `press_release.doc` file.	Text that you type and file names appear in `Courier` font.
A *condition* is...	A new term appears in *italics* when it is first defined.
The "Set access rights for all states" page appears in the right frame. Click the "Entry creator" checkbox.	Headings and labels appear in quotation marks.
Ctrl+click	This combination indicates that you can select multiple items from a list (Windows only). Press and hold the Ctrl key, use the mouse to click multiple selections, and then release the Ctrl key.
(page 19)	Cross-reference links (references to other parts of this manual) are underlined. If you are viewing this document in color, cross-references are also blue.

More Information

Customers with maintenance contracts can participate in SiteScape's support, Help, and customization forums. These forums provide a greater level of detail, collaborative exchanges with SiteScape engineers and the SiteScape support team, and the most up-to-date information available about SiteScape products and services.

To access the forums, use the following URLs:

Support:

Forum: http://support.sitescape.com/forum/support/dispatch.cgi/support

WebWorkZone: http://support.sitescape.com/forum/support/dispatch.cgi/wwzsupport

Help: http://help.sitescape.com/

Customization: http://support.sitescape.com/forum/support/dispatch.cgi/custom

Chapter 1: Overview

Commands and workflow processes are two of the most powerful and versatile features of SiteScape Forum. SiteScape software includes several specialized forums that make use of commands and workflow processes:

- Resume tracker
- Sales account manager
- Contact manager
- Help desk
- Document review

The specialized forums are customizations of standard discussion forums. Each specialized forum allows users to create entries that are suited to the exact type of task they must perform. For example, in the "Resume tracker" forum, you can add the resume of a job applicant, specify the applicant's desired salary, and give the applicant a rating. You can then track the progress of each applicant as she is called, interviewed, had her references checked, interviewed again, given an offer or turned away, and so on.

As another example, in the "Sales account manager" forum, you can add the company name, contact information, potential sale date, and other information related to an account. You can then manage and track the entire cycle of the sales lead, from "Assigned" to "Contacted" to "Quote Sent," all the way through to "Lost" or "Won."

In addition to taking advantage of these packaged customizations, Forum managers can create many more types of customized applications by defining *new* commands and workflow processes. When you customize a discussion forum with new commands and workflow processes, the forum facilitates and tracks the exact type of work done in your organization. (You do not need programming experience to create these customizations.)

A *command* is an item on the Add menu in a discussion forum that collects and displays the type of data that the discussion-forum manager wants. In addition to or in place of the standard commands, you can define a new command, such as **Add review document**, **Create sales account, Submit problem report,** or any phrase that applies to the work users are doing.

A *workflow process* is an online representation of this work. The workflow processes associated with the example commands in the previous paragraph could be named Document Review, Sales Account Manager, and Problem Tracker. When creating a workflow process, the discussion-forum manager defines an orderly and predictable process through which an entry must pass. When someone uses an associated command to create an entry, the entry automatically enters the first *state* (step) of the workflow process. The entry then moves through the process according to specified *transitions* (rules that define how an entry can move from one state to another). Users can track the work done on the entry, and, if the process has not been completed, it is clear who needs to take what action with the entry to move it to the next state.

Workflow processes include these features:

- Automatic e-mail notifications that inform the appropriate users that they can now work on an entry, or that an entry has remained in one state for too long.
- Questions for users to answer at different states of the workflow—the response determines the next workflow state for that entry.
- Precise access controls that specify, for each state, which users are allowed to respond to workflow questions or view, modify, or change the state of an entry.

You can use workflow processes in discussion forums and task forums.

The next chapter provides a detailed example of the kind of powerful application that you can create when you associate a workflow process with a new command.

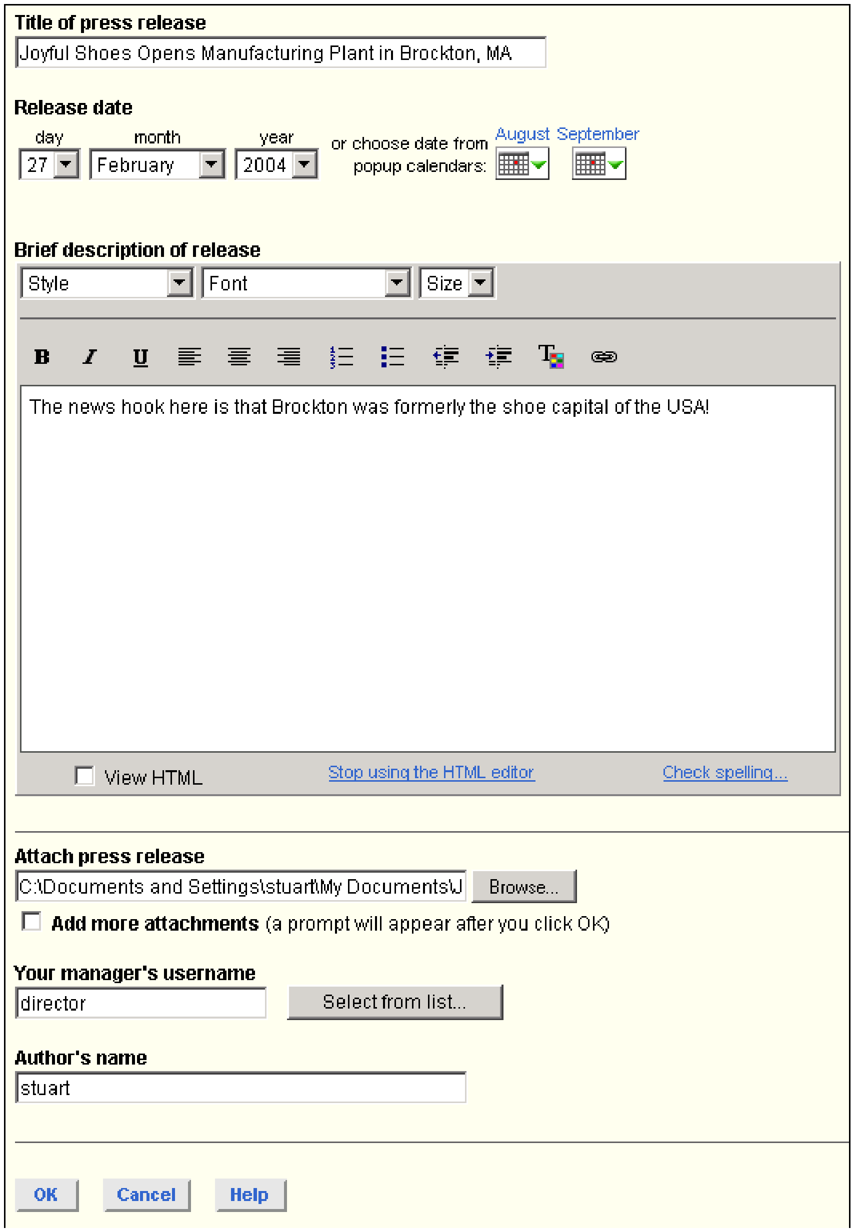
Chapter 2: Example: Reviewing a Document

This chapter provides a detailed example of a customization that uses a workflow and a new command to post and review documents. Later chapters explain how to build this customization step by step. (You do not need programming experience to make this customization.)

Consider a publicly-traded company that manufactures shoes. In this company's installation of Forum, one discussion forum is designated for reviewing press releases announcing new product lines and quarterly financial reports. The **Press-Release Review** workflow process allows the appropriate people to review, edit, and approve each press release. The workflow process moves each release through the different steps of the approval process.

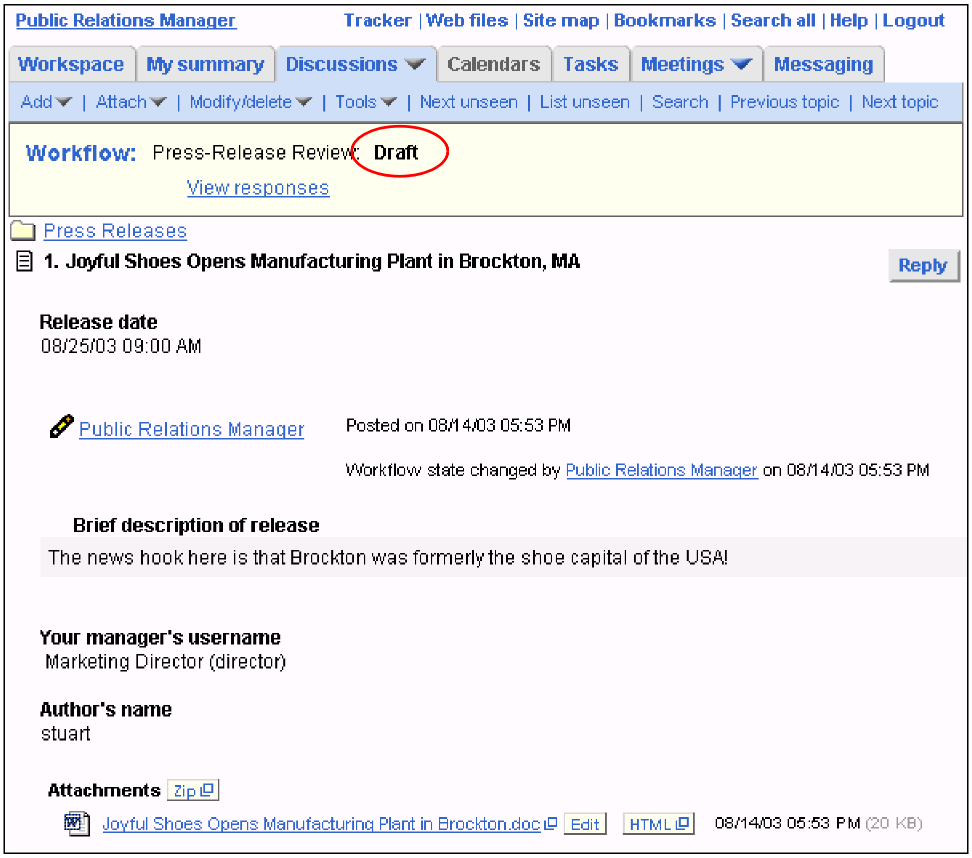
First, the public relations manager enters the discussion forum that is used for reviewing press releases. Then, he clicks **Add** on the toolbar and chooses **Add a press release**.

The form that appears allows him to enter information that is specific to press releases, such as "Title of press release," "Release date," and so on.



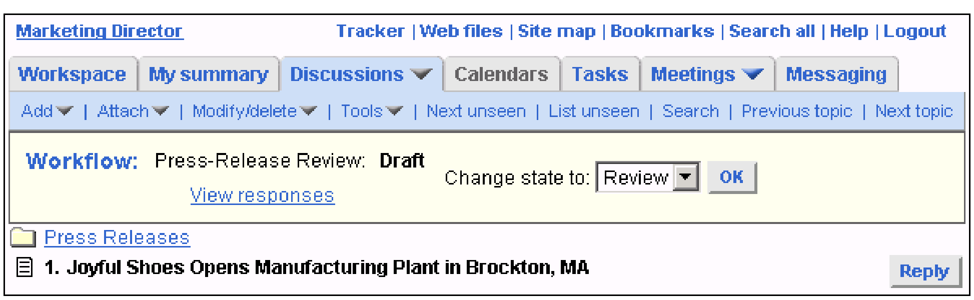
The public relations manager adds a press release for review by completing the form and attaching the document.

The entry then appears in the discussion forum. Because it is new, its *workflow state* (step in the process) is called **Draft**.



The page that displays the press-release entry includes the title (Joyful Shoes Opens Manufacturing Plant in Brockton, MA), the manager's name (Marketing Director), and other information that the public relations manager specified. A link to the uploaded document appears at the bottom of the entry, below the "Attachments" header.

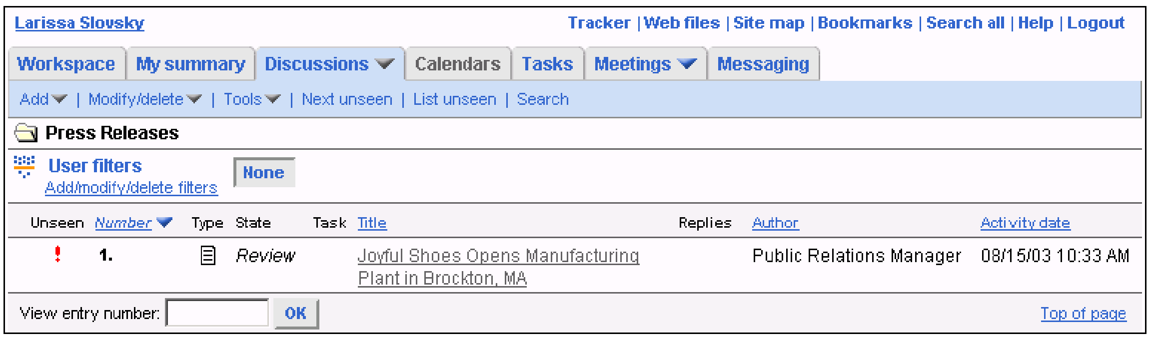
When an entry is in the **Draft** workflow state, both the public relations manager and the marketing director can view it. However, *only* the marketing director has access to approve the press release for review by the Review Committee. So, when the marketing director views the entry, she sees a **Change state to** drop-down list.



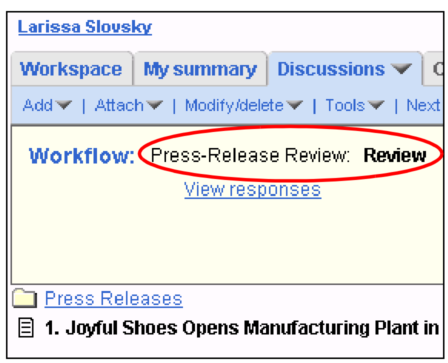
She chooses **Review** from the drop-down list and clicks **OK**. This action moves the press release to the **Review** state. Now, the Review Committee can access the entry.

When an entry moves to the **Review** state, the workflow automatically sends e-mail to the members of the Review Committee to inform them that a press release is available for review. The e-mail message contains a link to the discussion forum where the entry is waiting.

Larissa, a member of the Review Committee, enters the discussion forum. In the list of entries, she sees a column called *State*. This column allows users to see at a glance the current workflow state of each entry. The "Joyful Shoes Opens Manufacturing Plant in Brockton, MA" entry is now in the **Review** workflow state.



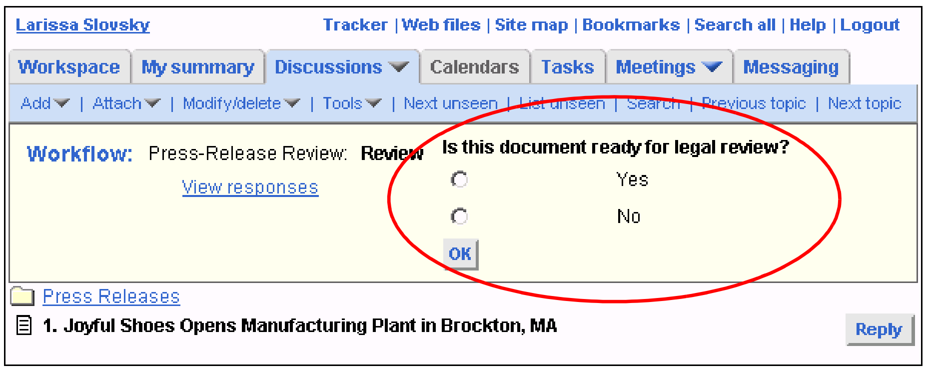
When Larissa clicks on the entry title, the entry page appears. The workflow state information appears on the entry page.



To review the press release, she clicks the **Edit** button next to the link to the press release (at the bottom of the entry page).

Forum automatically "locks" the entry and opens the document in the appropriate program on her computer (in this case, Microsoft Word). Larissa edits the press release, saves the file, and uploads it to the discussion forum. Forum saves previous versions of the document.

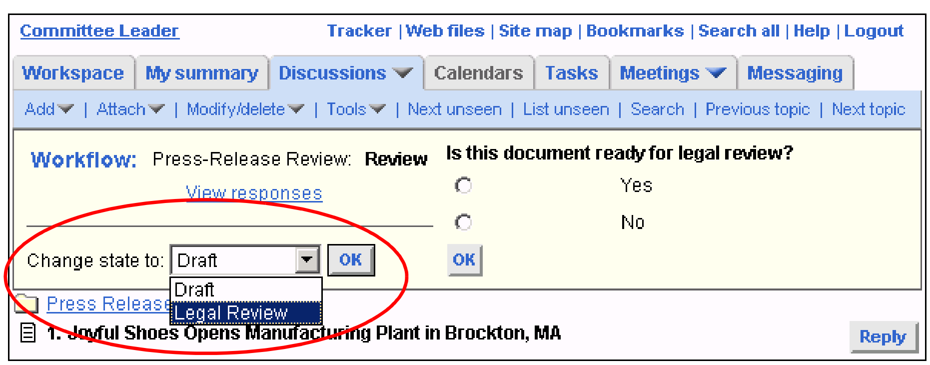
When an entry is in the **Review** state, members of the Review Committee see a question at the top of the entry page. To answer the question, they click a radio button and then click **OK**.



If everyone on the Review Committee answers "Yes" to the question, the entry automatically moves to the **Legal Review** state. However, if some people answer "No" or do not answer the question, the entry does not change state.

If the entry does not change state for two weeks, the workflow automatically sends e-mail to the committee leader and to the chief legal counsel, letting them know that the entry has been inactive for two weeks. The e-mail message contains a link to the entry.

In the **Review** state, the committee leader has access rights to make a decision that overrides the opinions of the others. When the committee leader views the entry, he sees the workflow question and a **Change state to** drop-down list.



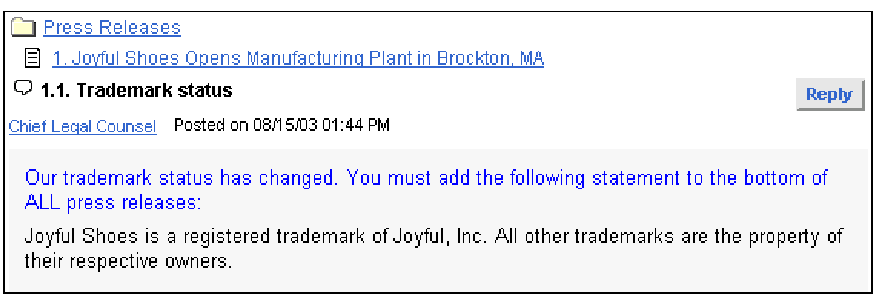
The committee leader can choose the **Legal Review** workflow state from the menu, allowing the members of the Legal Department to take their turn reviewing the press release, or he can choose **Draft** from the menu, and send the press release back to the public relations manager for further revisions.

In this example, a few members of the Review Committee answer "No," so the entry does not change state. But the committee leader reviews the press release and decides that it *is* ready for the next state. He needs to override the others' answers and change the state manually. So, he chooses **Legal Review** from the **Change state to** drop-down list and clicks **OK**.

The **Legal Review** state appears at the top of the entry. It is now the Legal Department's turn to review the press release.

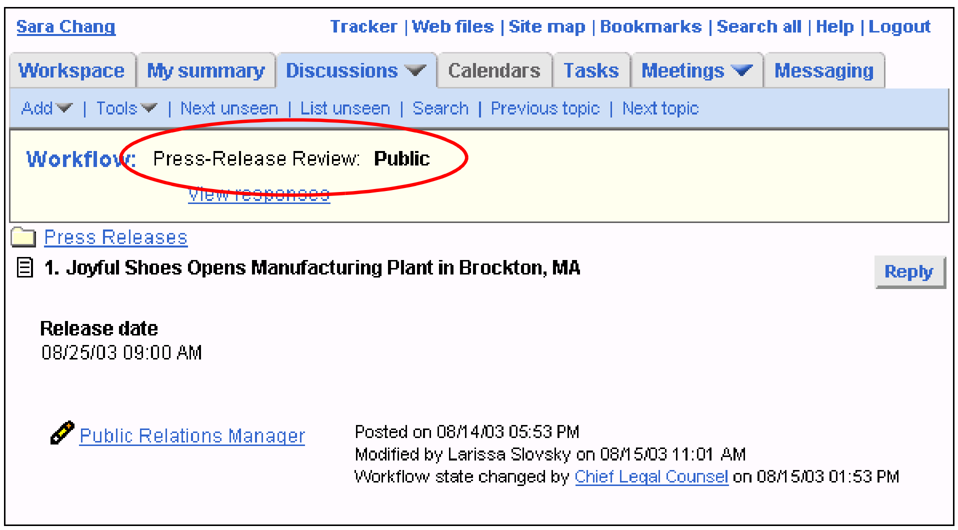
As before, the workflow automatically sends e-mail to the members of the Legal Department to inform them that a press release is ready for their review. The e-mail message includes a link to the discussion-forum entry.

The members of the Legal Department take their turns reviewing the press release and adding comments as replies to the entry.



The chief legal counsel is the only one with access to move an entry out of the **Legal Review** state. When she is ready, she can change the workflow state of the entry to **Public**, allowing all readers to view the press release, or she can change the state to **Review**, sending the press release back to the Review Committee for further revisions.

The chief legal counsel chooses **Public** from the drop-down menu and clicks **OK**. The entry then moves to the **Public** workflow state, which appears at the top of the entry page. The entry is now available for viewing in read-only format by all users who have access to this forum.



The next chapters provide step-by-step instructions for creating this command, **Add a press release**, and its associated workflow process, called **Press-Release Review**.

Chapter 3: Creating a Command

This chapter provides instructions for creating the **Add a press release** command for the **Add** menu in the discussion forum. In a subsequent chapter, you create the **Press-Release Review** workflow process. Finally, you associate the command with the workflow process, so that users who create an entry with this command automatically start the workflow.

Before you begin the exercises described in this tutorial, SiteScape recommends that you create a separate discussion forum, because this customization changes the way that the forum functions. You can name the practice forum "Press-Release Test."

> ***Note:*** *To create a discussion forum, you must be able to log in at the level of a workspace manager. If necessary, have your workspace or zone manager create the forum.*

You can restrict access to the "Press-Release Test" forum, so that only a few users can enter and use the new command. Encourage these users to offer suggestions for improvements. Later, after you make revisions, you can *export* the workflow process and the new command to another discussion forum for general use (page 53).

To create the **Add a press release** command, you must:

- Plan the New Command (page 11)
- Create the Command (page 12)
- View the Current Command (page 17)
- Adjust the Layout of the Command (page 18)

Plan the New Command

Before you create the command, interview your users to collect information. What information should appear in the entry? List the information that the command must collect:

- Name of entry creator
- Manager's username
- Title of press release
- Brief description of release
- Author's name
- Release date
- Place to upload the press-release file

You will refer to this list as you create the command.

Create the Command

To create the **Add a press release** command, you must:

- Access the Command-Definition User Interface (page 12)
- Name the New Command (page 13)
- Use Default Elements (page 14)
- Add Elements (page 16)

Access the Command-Definition User Interface

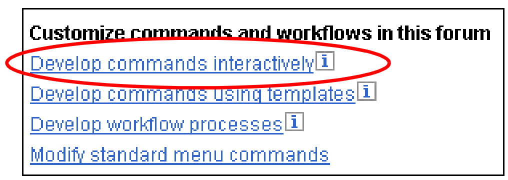
To access the command-definition user interface:

1 Enter the "Press-Release Test" forum.

2 From the **Tools** menu, click **Administration**.

The "Discussion-forum management" page appears.

3 In the row titled "Customize commands and workflows in this forum," click **Develop commands interactively**.



The "Add a command" form appears in the right frame. (If a list of existing commands appears, click **Add a command** on the toolbar.)

Name the New Command

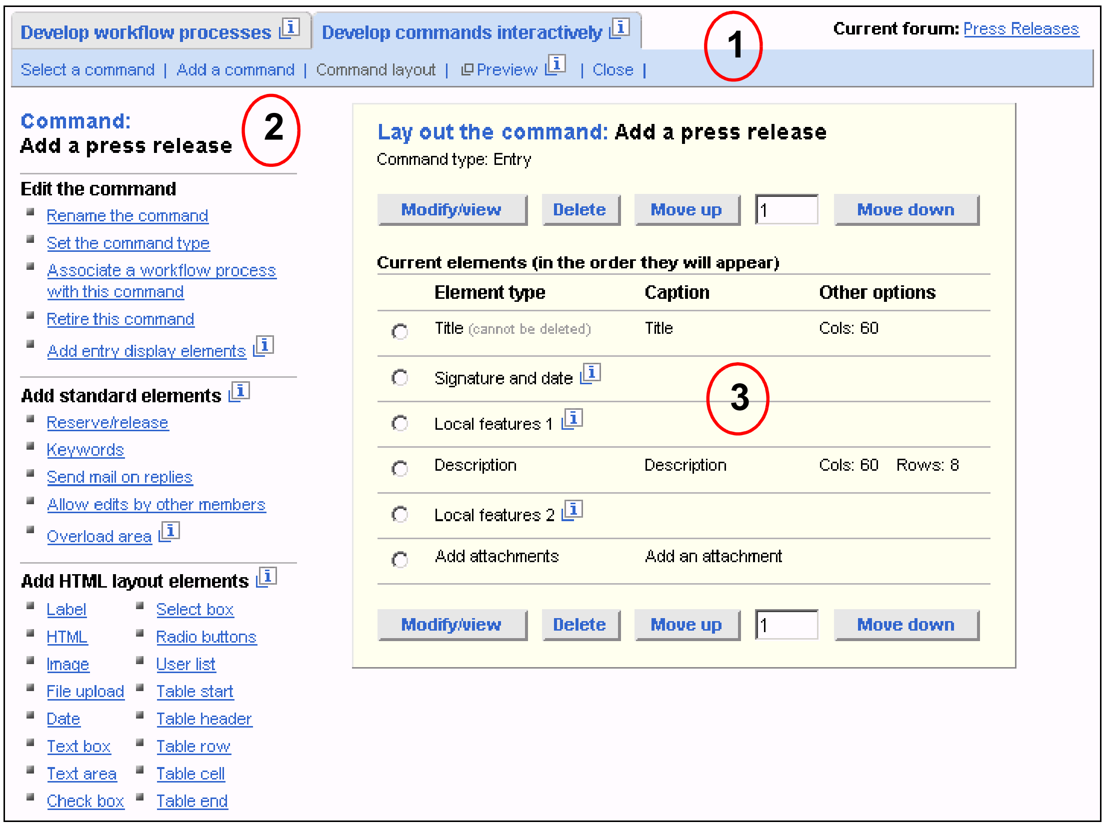
To name the new command:

1 In the "Command name" box, enter the name of the new command:

```
Add a press release
```

2 Click **Add**.

The three frames of the command user interface appear.



Each frame displays different information:

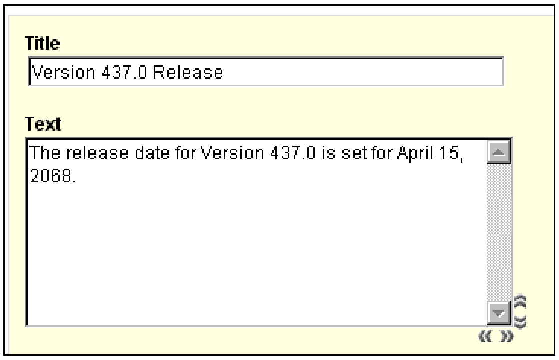
1 The top frame displays the toolbar, with links for choosing commands, adding commands, and previewing commands that you are building.

2 The left frame displays links for editing a command and for adding individual elements to the command. When you click a link in the left frame, the appropriate form appears in the right frame.

3 The right frame displays the "Lay out the command" table, which lists the elements in the new "Add a press release" form, such as the Title and Description. (The "Lay out the command" table in the picture lists the elements that are present by default.)

The right frame can also display forms for you to complete as you build the command. After you complete a form, the updated layout table appears.

Some elements appear only on the add-entry form, and others are visible only on the entry page in the discussion forum. There are also elements, such as the title and description, that appear on both the add-entry form (left) and the entry page in the discussion forum (right).



In contrast, the "Signature and date" element, which displays the name of the entry creator and a date and time stamp, appears only on the entry page in the discussion forum (see the picture on the right, below the title).

To see what the "Add a press release" form looks like at this point, click **Preview** on the toolbar. The form appears in a new window. If you complete the form and click **OK**, the entry page in the "Press-Release Test" forum appears in the new window.

You can use **Preview** to check your progress as you build the command. You can leave the new window open, and refresh the page after adding an element to the command. The new window displays your changes to the "Add a press release" form.

Use Default Elements

A new command includes several default elements, such as the Title and the Description. You can use some of the default elements on the "Add a press release" form, but you must change the captions of two of them so that they label the collected information appropriately.

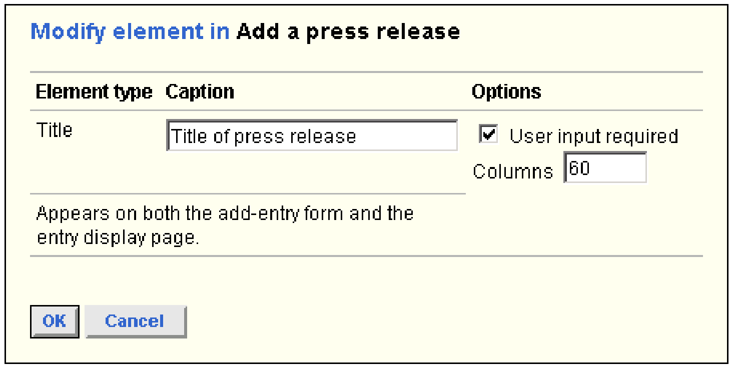
Change the Captions

You must change the Title, Description, and Attachments captions to refer specifically to press releases.

To change the captions:

1. In the right frame, in the layout table, click the "Title" radio button.
2. Click **Modify/view**.

A row containing information about the element appears.



3 In the "Caption" box, enter:

```
Title of press release
```

4 Click the "User input required" checkbox. When someone adds a press release, he or she is required to provide a press-release title.

Note: *SiteScape recommends that you indicate on the form if an element is required. For example, you can add a red asterisk to the caption by entering HTML in the "Caption" box:*

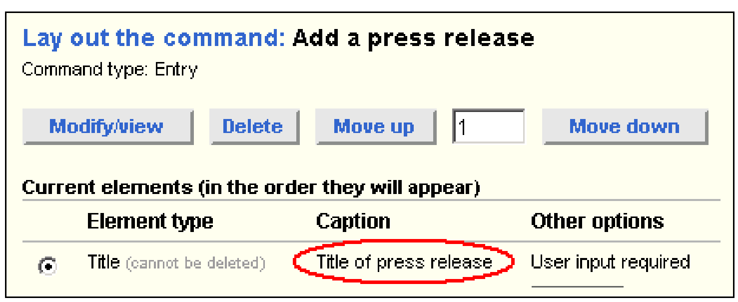
```
Title of press release<font color="red">*</font>
```

Or, you might indicate more directly that an element is required:

```
Title of press release (required)
```

5 Click **OK**.

The "Title" element appears in the "Current elements" table, displaying the changes you made.



Now, "Title of press release" appears as the title of the "Add a press release" form.

6 Follow the same procedure to change the Description caption to:

```
Brief description of release
```

7 Follow the same procedure to change the "Add attachments" caption to:

```
Attach press release
```

The new captions appear on both the "Add a press release" form and the entry page in the discussion forum.

Keep the "Signature and date" Element

As a general guideline, you should not remove the default "Signature and date" element, which displays the name of the entry creator and a time stamp at the top of the entry page in the discussion forum. With "Signature and date," you do not need to add a separate element for the name of the entry creator.

Add Elements

You still need the "Your manager's username" element, the "Author's name" element, and the "Release date" element. To add these, you use the links in the left frame.

Add the "Your manager's username" Element

When someone adds an entry, they must enter their manager's username.

To add the "Your manager's username" element:

1. In the left frame, below the "Add HTML layout elements" header, click **User list**.

   In the right frame, the "Add element to..." form appears.
2. In the "Caption" column, enter:

   ```
   Your manager's username
   ```
3. In the "Options" column, click both checkboxes: "User input required" and "Limit selection to one user."

   The entry creator is required to specify the manager's username, and can specify only one name.
4. Click **OK**.

   The layout table reappears in the right frame, displaying the new element as the last item in the list.

Add the "Author's name" Element

To add the "Author's name" element:

1. In the left frame, below the "Add HTML layout elements" header, click **Text box**.

   The "Add element to..." table appears in the right frame.
2. In the "Caption" column, enter:

   ```
   Author's name
   ```
3. In the "Options" column:

   a. Click the "User input required" checkbox.

      This item is required, in case the entry creator is not the author.

b Specify a number of columns for the text box.

The text box should be long enough to contain a name, so specify 50 columns. You can always change this number later.

c In the "Allowed characters" select box, click "Alphabetic characters."

4 Click **OK**.

The layout table reappears in the right frame, displaying the new element as the last item in the list.

Add the "Release date" Element

To add the "Release date" element:

1 In the left frame, below the "Add HTML layout elements" header, click the **Date** link.

The "Add element..." table appears in the right frame.

2 In the "Caption" column, enter:

```
Release date
```

3 In the "Options" column:

a Click the "User input required" checkbox.

b Click the "Use the date widget" checkbox.

This allows users to choose the date from pop-up calendars, which are available for the current month and the next month. Otherwise, users can specify the release date using drop-down menus.

c In the "Display format" box, choose **mm/dd/yy**. This is the format that the entry creator will use for the release date.

4 Click **OK**.

The "Lay out the command" table reappears in the right frame, displaying the new element as the last item in the list. The table now contains the default elements and the elements you added.

View the Command

You can view and test your command without leaving the command user interface.

1 To view the "Add a press release" form, click **Preview** on the toolbar.

The form appears in a new window.

2 Complete the form in the new window and click **OK**.

In the new window, the new entry appears in the "Press-Release Test" discussion forum.

In this way, you can create new entries from the Preview window to test the command as you build it.

Adjust the Layout of the Command

You can rearrange the order in which elements are displayed. You can reposition each element after you add it, or you can wait until you have added all the elements and then reposition them.

In this example, you want the release date to appear directly below the title of the press release.

To move the "Release date" element:

1 In the "Lay out the command" table in the right frame, click the radio button next to the "Date" element.

2 In the text box between **Move up** and **Move down**, enter the number 7.

3 Click **Move up**.

Forum refreshes the page. The element moves as you specified.

4 On the toolbar, click **Preview**, or refresh the Preview window if it is still open.

The "Add a press release" form appears in a new window. The "Release date" element now appears directly below the "Title" element.

5 To see an entry page, complete the form in the new window and click **OK**.

The entry page appears in the new window, with the release date in the correct position.

You can now create the workflow process, called Press-Release Review, to associate with the new **Add a press release** command.

Chapter 4: Creating a Workflow Process

This chapter describes the tasks involved in creating a workflow process:

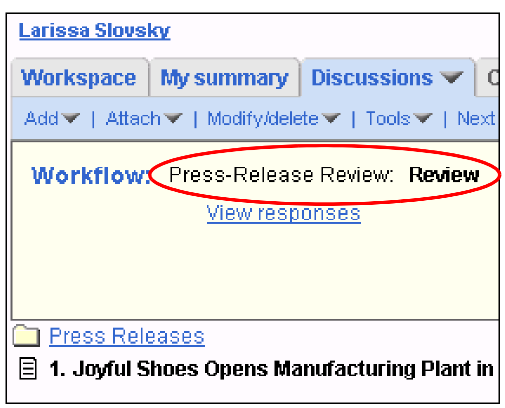
- Plan the Workflow (page 19)
- Access the Workflow Management Pages (page 25)
- Add the Workflow States (page 27)
- Define the Flow of Work (page 28)
- Set Access Rights (page 35)
- Set E-Mail Notifications (page 44)

Plan the Workflow

Consult your users for more information about the details of their work. Get answers to these questions:

- Which users and groups are involved in reviewing a press release?
- What are the different steps, or *states*, of the process?
- In each state, what conditions must be met for an entry to move to the next state?
- Can an entry move to more than one possible state?
- In each state, who is allowed to see and edit the document?

  For example, which users and groups can work with the document when it is in the **Review** state?



- In each state, who is responsible for changing the workflow state?

  For example, who can change the workflow state from **Legal Review** to **Public**?

- Who should receive an e-mail message when an entry enters or leaves a specific state?
- How long can an entry remain in one state before someone must be notified that it is inactive?

After you interview your users, organize the information you collected by doing the following:

- List the individual users involved in the workflow
- List the groups involved in the workflow
- Name the workflow states (steps in the process).
- Define the state *transitions* (rules that specify how an entry can move from one state to another).
- Define who can work with entries in each state. Who can see the entry? Who can work with the entry? Who can move the entry to another workflow state?
- Define e-mail notifications. Who must receive an automatic e-mail message when an entry enters or leaves a specific state? Who must receive a message when an entry does not change state before a specified due date?

List the Individual Users

- Entry creator (public relations manager)
- Marketing director
- Review committee leader
- Chief legal counsel

List the Groups

- Review committee:
  - Larissa Slovsky
  - Jean-Michel Hebert
  - Committee leader
- Legal department:
  - Sara Chang
  - Joy Morgan
  - Chief legal counsel
- "All readers" group (a built-in group that can read entries after they are made public)

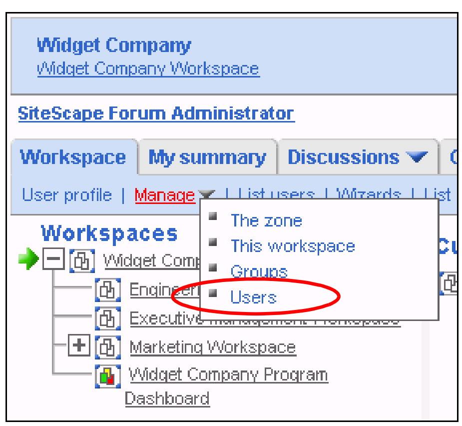
Register Users

For the purposes of this tutorial, you can register the usernames mentioned in the previous section, or use usernames that already exist on your system.

> ***Note:*** *To register usernames and define groups, you must be able to log in at the level of a zone manager. If necessary, have your zone manager perform these initial steps.*

To register usernames:

1. In the upper-right corner of the command UI, click the link to return to the "Press-Release Test" forum.
2. Click the **Workspace** tab.
3. On the toolbar, click **Manage**.
4. On the menu, click **Users** (circled in the picture).



   The management menu appears.

5. In the "Basic user management tools" section of the menu, click **Register a user**.

6 Complete the form, and repeat this process as many times as necessary to register a name, password, and e-mail address for these users:

- Public Relations Manager (this is the user who creates the entry)
- Marketing Director
- Committee Leader
- Chief Legal Counsel
- Larissa Slovsky
- Jean-Michel Hebert
- Sara Chang
- Joy Morgan

The e-mail address is necessary in order for automatic e-mail notifications to work. For more information about registering users, refer to the *Getting Started Guide for Managers* or to the online Manager Help system.

Add the Groups to Forum

You must now add the "Review Committee" and "Legal Department" groups to Forum. By creating these groups now, you save a great deal of time. Later, when you create the workflow process, you can set access controls and e-mail notifications more quickly.

To create the "Review Committee" group:

1 From the management menu, click **Manage Groups**.

2 In the "Group management tools" section of the menu, click **Create a group**.

The "Create a group" wizard appears.

3 Use the wizard to create the groups that you listed and add the appropriate users to each group.

For more information about creating groups, refer to the *Getting Started Guide for Managers* or the online Manager Help system.

Name the Workflow States

The example workflow includes four states:

- **Draft**
- **Review**
- **Legal Review**
- **Public**

Define the State Transitions

These are the rules that define how an entry moves from one state to another:

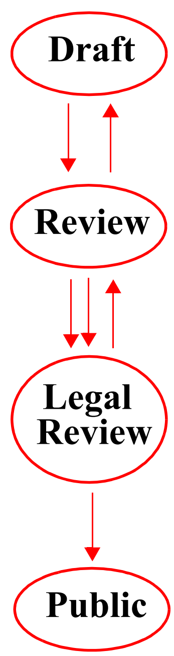
- From **Draft** to **Review**: manual transition

  The marketing director (the entry creator's manager) can choose another state from the **Change state** list on the entry page in the discussion forum.

- From **Review** to **Legal Review** (two possible transitions):
  - Automatic transition: If everyone on the Review Committee answers "Yes" to the question "Is this document ready for legal review?", the entry moves automatically to the **Legal Review** state.
  - Manual transition: If the committee members reach an impasse, the committee leader can override the committee and choose **Legal Review** from a drop-down menu to move the entry to that state.
- From **Review** back to **Draft**: manual transition
- From **Legal Review** to **Public**: manual transition
- From **Legal Review** back to **Review**: manual transition

After you define the workflow states and transitions, draw a flow chart of the process. Keep your flow chart as simple as possible.

Notice that this flow chart shows the two possible transitions from **Review** to **Legal Review**.



You can refer to the flow chart as you build the workflow.

Define Who Can Work with Entries in Each State

Draft state

The entry creator and his manager can view and edit the entry. However, only the manager can change the workflow state to **Review**, allowing the Review Committee to access the entry.

Review state

Members of the Review Committee can view and edit the entry and answer the question "Is this document ready for legal review?" Also, the committee leader can make manual transitions to **Legal Review** or back to **Draft**.

Legal Review state

The Legal Department can view and edit the entry, and the chief legal counsel can change the workflow state to **Public** or back to **Review**.

Public state

All readers can view the entry in read-only format. (When a press release reaches the **Public** state, it is complete and does not need revisions.)

Define E-Mail Notifications

Two of the workflow states contain automatic e-mail notifications:

- When an entry enters the **Review** state, Forum sends e-mail to the members of the Review Committee, with the subject line "A press release is ready for review."
- When an entry is in the **Review** state for two weeks without moving to another state, Forum sends e-mail to the leader of the Review Committee and to the chief legal counsel, with the subject line "A press release has been inactive for two weeks."
- When an entry enters the **Legal Review** state, Forum sends e-mail to the Legal Department, with the subject line "A press release is ready for legal review."

You can now use the information you collected to create the workflow process.

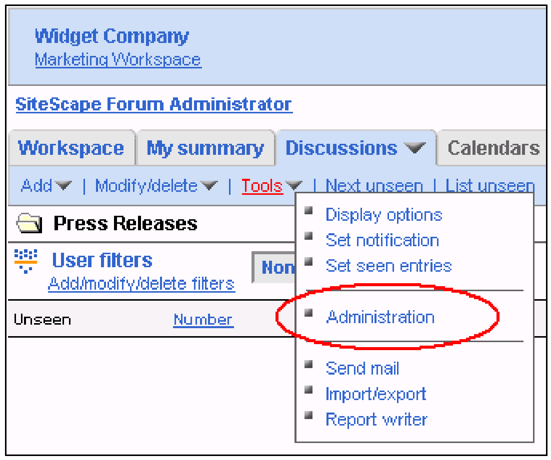
Access the Workflow Management Pages

To access the workflow management pages:

1 Enter the "Press-Release Test" discussion forum.

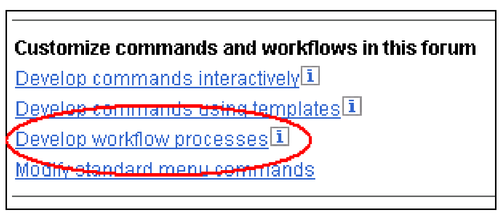
2 On the toolbar, click **Tools**.

3 In the menu, click **Administration** (circled in the picture).

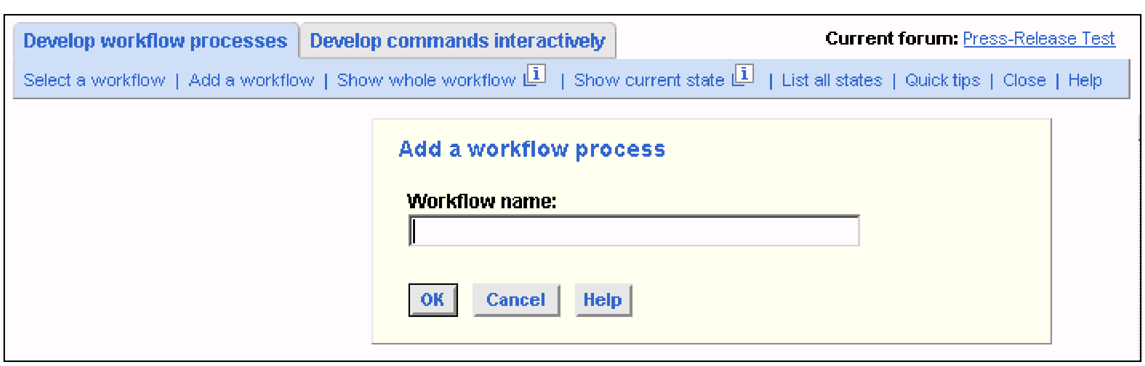


The "Discussion-forum management" page appears.

4 Under "Customize commands and workflows in this forum," click **Develop workflow processes**.



The "Add a workflow process" form appears. (If a list of existing workflow processes is visible in the right frame, click **Add a workflow** on the toolbar.)



You must now provide a name for the new workflow process.

To name the workflow process:

1 Enter the workflow name in the text box:

```
Press-Release Review
```

2 Click **OK**.

The workflow name appears in the right frame. Editing links appear in the left frame.

The "Create or modify workflow processes" page has three frames:

1 The top frame displays the toolbar, with links for choosing existing workflow processes, adding new workflow processes, and navigating the workflow user interface.

2 The left frame displays links for editing the workflow. When you click one of these links, the appropriate form appears in the right frame. After you complete the form, the updated flow chart appears in the right frame.

3 The right frame displays forms for you to complete as you are developing the workflow, such as the "Add a workflow process" form. The right frame can also display a flow chart of the workflow that updates itself as you develop the workflow.

To build the steps in the workflow process, you must now add the states.

Add the Workflow States

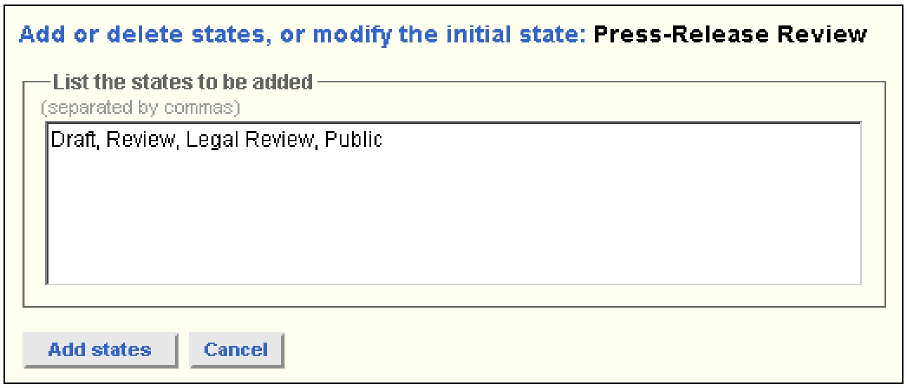
To add the states of the workflow process:

1 In the left frame, click **Add or delete states, or modify the initial state**.

A form appears in the right frame.

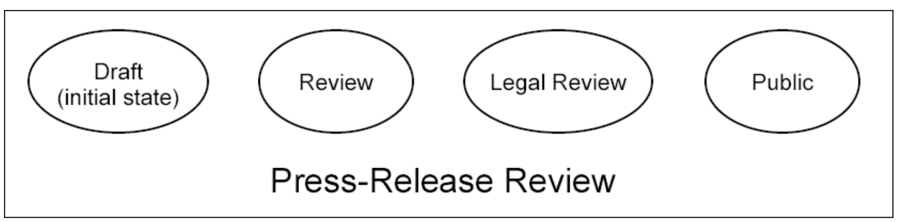
2 Enter the state names, separated by commas.

Note: *State names are case-sensitive.*



3 Click **Add states**.

The workflow chart appears. Each state appears in an oval. There are no connecting lines between the ovals, because the workflow does not yet include any transitions between the states.



The initial state of this workflow is **Draft**, because it is the first state you entered in the list of states. You can change the initial state at any time.

Define the Flow of Work

To define the way that the work flows, you define *transitions*, or rules for how entries can move from one workflow state to another.

Move From Draft to Review

Because **Draft** is the initial workflow state, you begin by creating a transition that allows entries to move from the **Draft** to the **Review** state. You define a *manual transition*, which allows a user to choose another workflow state from a drop-down menu on the entry page in the discussion forum.

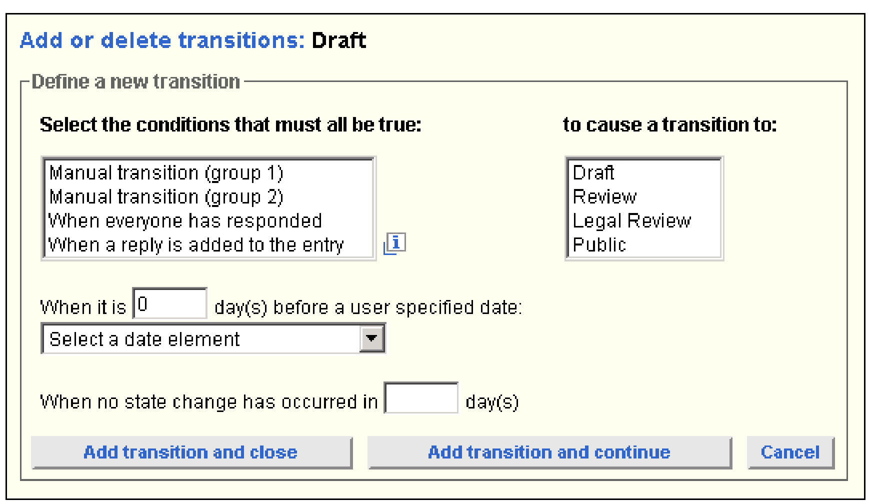
To create a manual transition to the **Review** state:

1 On the workflow chart, click the **Draft** state.

A workflow icon and the state name appear in the left frame below the "Edit the current state" header, indicating that you are now editing the **Draft** state.

2 Below the "Edit the current state" header, click **Add or delete transitions**.

The "Add or delete transitions" form appears in the right frame. You use this form to define how an entry moves from one state to another.



In the "Select the conditions that must all be true" box, you choose *conditions*, which are reasons for an entry to change state. In the "to cause a transition to" box, you choose the destination state of the transition.

3 In the "Select the conditions that must all be true" box, click **Manual transition (group 1)**.

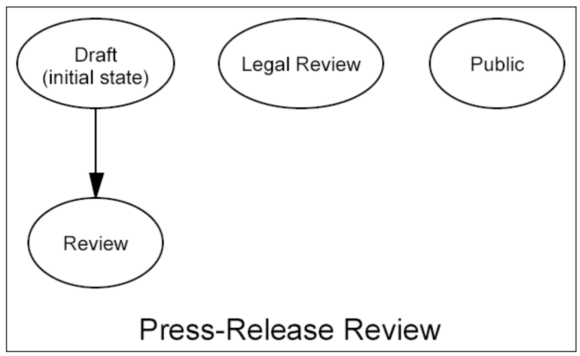
This allows a user or group of users to choose another state from the **Change state** drop-down list on the entry page in the discussion forum.

4 In the "to cause a transition to" box, click **Review**.

A manual transition can move an entry to the **Review** state. This means that a user can choose the **Review** state from a drop-down menu on the entry page.

5 Click **Add transition and close**.

The flow chart reappears, displaying the first transition as an arrow from the **Draft** to the **Review** state.



Move from Review to Legal Review

In a transition from the **Review** state to the **Legal Review** state, the members of the Review Committee must all answer "Yes" to the question, "Is this document ready for legal review?" So, before you can create this transition, you must create a *workflow question*.

Add a Workflow Question: "Is this document ready for legal review?"

To add the workflow question:

1 On the workflow chart, click the **Review** state.

2 In the left frame, click the **Define a question** link.

The "Define a question asked in **Review**" form appears in the right frame.

3 In the "Question" text box, enter:

```
Is this document ready for legal review?
```

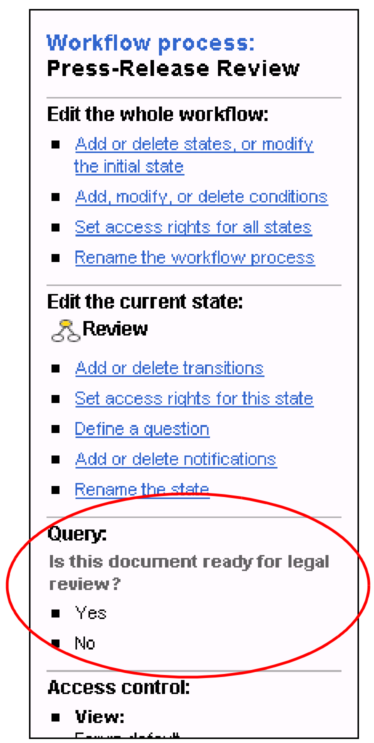
4 In the "Responses" area, enter, on separate lines:

```
Yes
No
```

5 Click **OK**.

The workflow chart reappears in the right frame.

The question definition appears in the left frame, below the "Query" header.



Now, when someone on the Review Committee views an entry in the **Review** state, the question appears at the top of the entry page (see page 7).

Add a Condition: All Answers are "Yes"

To set up the workflow to check the answers of all committee members, you must now add a condition that searches through the answers to see if all of them are "Yes."

> ***Note:*** *Make sure that you have already added the workflow question. You cannot create the condition before adding the workflow question.*

To add the "All answers are 'Yes'" condition:

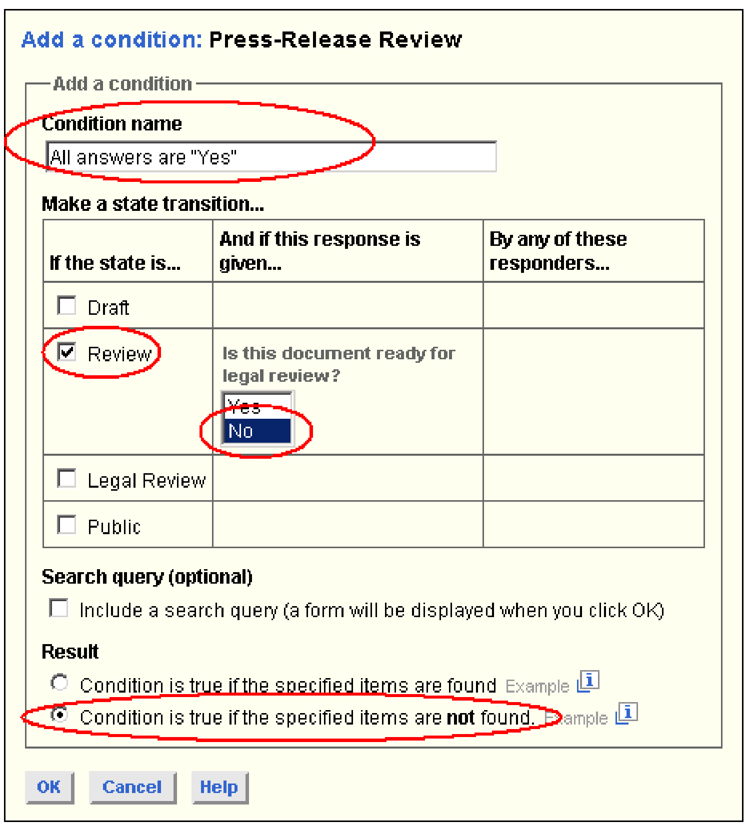
1. In the left frame, click **Add, modify, or delete conditions**.

   A list of the built-in conditions appears in the right frame.
2. Click **Add condition**.

   The "Add a condition" form appears.
3. In the "Condition name" text box, enter:

   ```
   All answers are "Yes"
   ```
4. In the "If the state is..." column of the table, click the **Review** checkbox.
5. In the "And if this response is given..." column, click **No**.
6. Click the "Condition is true if the specified items are **not** found" radio button.

   The form now looks like this.



A condition can be true if information is found, or it can be true if information is not found.

If you want the condition to be that everyone answers "Yes," you must use the "...**not** found" radio button and specify the "No" response. You are essentially using two negative statements to make a positive statement.

If you use the other radio button, Forum makes the condition true as soon as one person answers "Yes," without checking the other responses—because one "Yes" means the information is immediately found.

7 Click **OK**.

The "Add, modify, or delete conditions" form reappears, displaying the new "All answers are 'Yes'" condition in the last row of the table.

○	Search (true if not found)	All answers are "Yes" Review (query) Is this document ready for legal review? No

The workflow can now use the "All answers are 'Yes'" condition to help determine if a press-release entry can move to the **Legal Review** state.

Add an Automatic Transition to Legal Review

To create the automatic transition to the **Legal Review** state:

1 In the left frame, click **Add or delete transitions**.

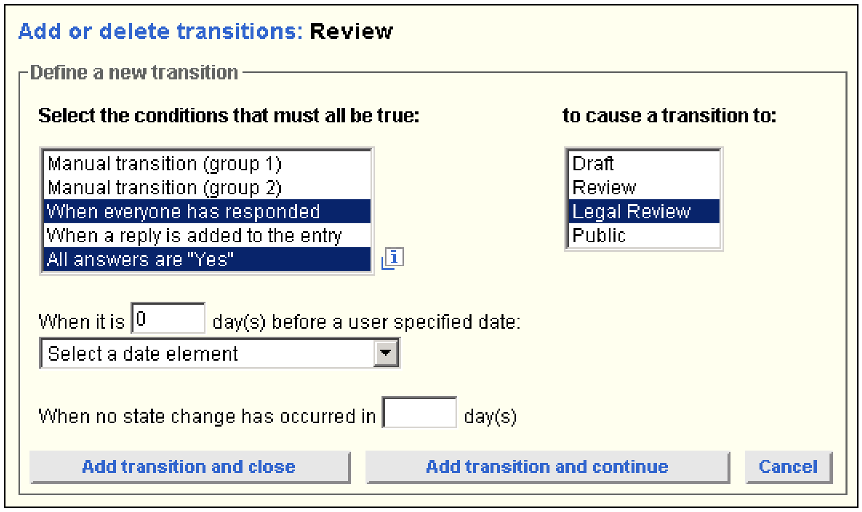
The form for adding transitions appears in the right frame.

2 In the "Select the conditions that must all be true" box, select two conditions (on Windows, use Ctrl+click for multiple selections):

- **When everyone has responded**
- **All answers are "Yes"**

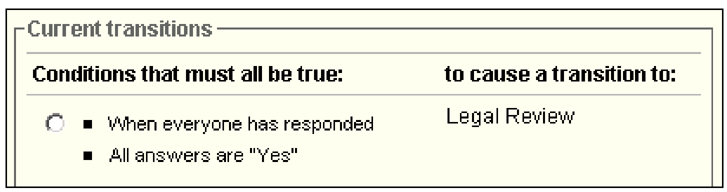
Both items should be highlighted. Both conditions must be true for an entry to move automatically from the **Review** state to the **Legal Review** state.

3 In the box on the right, click **Legal Review**.



4 Click **Add transition and continue**.

The transition appears in the "Current transitions" table at the bottom of the form.



Now, an entry automatically moves to the **Legal Review** state if everyone on the Review Committee answers "Yes" to the workflow question.

Add a Manual Transition to Legal Review

If the process gets stuck because the review-committee members do not agree, a manual transition can allow someone to override the others’ decisions and make a transition by choosing **Legal Review** from a drop-down menu.

To create a manual transition to the **Legal Review** state:

1 In the "Select the conditions that must all be true" box, click **Manual transition (group 1)**.

2 In the "to cause a transition to" box, click **Legal Review**.

3 Click **Add transition and continue**.

The manual transition appears in the "Current transitions" table at the bottom of the form.

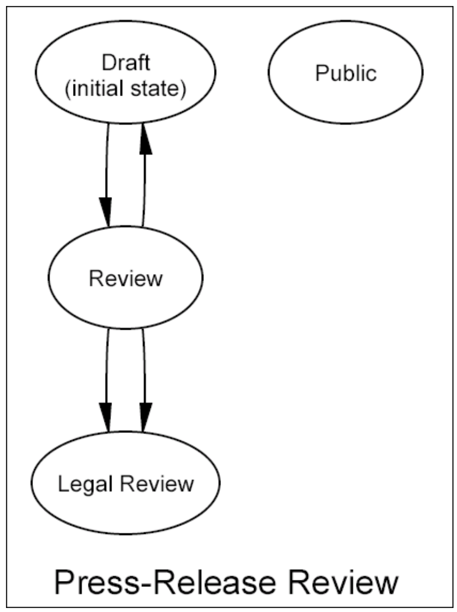
Move from Review to Draft

As your flow chart specified (on page 23), the committee leader can move the entry back to the **Draft** state if more revision is necessary.

To create a manual transition back to the **Draft** state:

1. In the "Select the conditions that must all be true" box, click **Manual transition (group 1)**.
2. In the "to cause a transition to" box, click **Draft**.
3. Click **Add transition and close**.

   The flow chart reappears, displaying the new transitions as arrows from **Review** to **Draft**, and from **Review** to **Legal Review**.



Notice that there are two arrows from **Review** to **Legal Review**, indicating the two possible transitions:

- If all answers are "Yes" to the workflow question, the entry moves from **Review** to **Legal Review**.
- If the committee leader makes a manual transition, the entry moves from **Review** to **Legal Review**.

Move Out of Legal Review

From the **Legal Review** state, the chief legal counsel can move an entry to the **Public** state (if approved) or back to the **Review** state (if not approved).

To create transitions from the **Legal Review** state:

1. In the workflow chart, click **Legal Review**.

2 In the left frame, click **Add or delete transitions**.

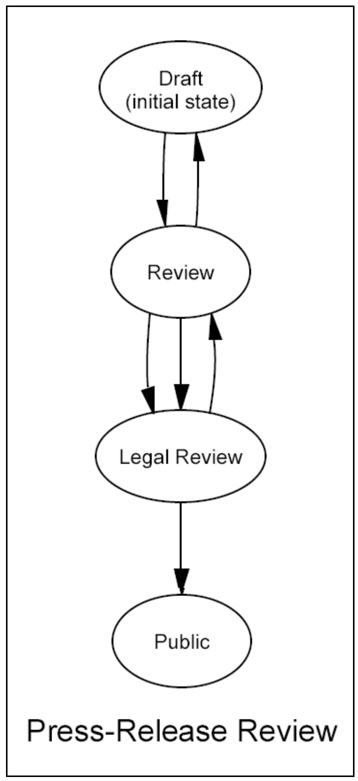
3 Follow the procedure in the previous section and add:

- Manual transition (group 1) to the **Public** state
- Manual transition (group 1) to the **Review** state

The chief legal counsel can approve the press release and make it **Public**, or return the entry to the **Review** state for further review.

4 View the workflow chart again.

The new transitions appear in the chart. The workflow process now resembles your original flow chart.



Set Access Rights

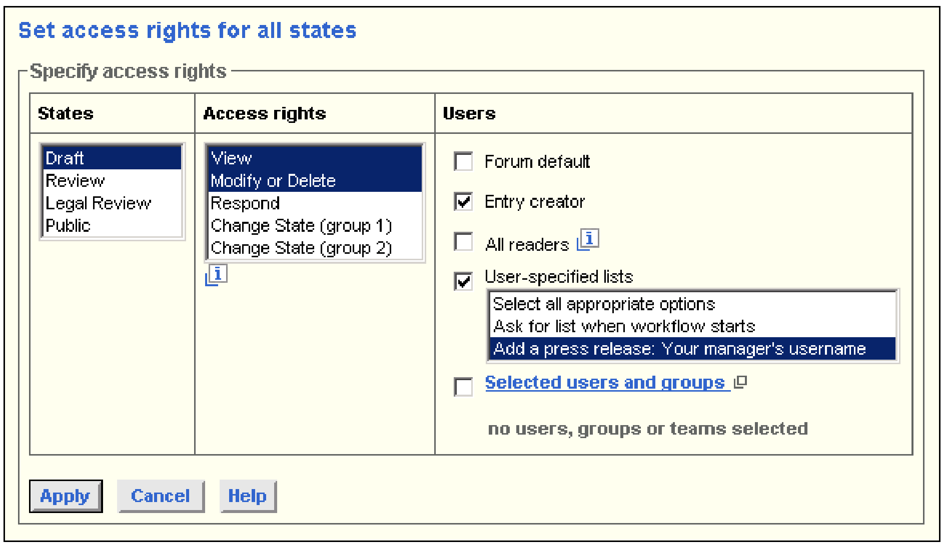
Refer to the list you made when you decided who can work with entries in this workflow (page 24). You specified, for each state, who can view an entry, modify or delete an entry, change its state, or answer a workflow question. You can now set these access controls.

To view the form for setting access controls, click **Set access rights for all states** in the left frame. The form that appears allows you to set access rights for each workflow state.

Set Access Rights for the Draft State

To set access rights for the **Draft** state:

1. In the "States" column of the form, click **Draft**.
2. In the "Access rights" column, use Ctrl+click to select the **View** and **Modify or Delete** access rights.
3. In the "Users" column:
   a. Click the "Entry creator" checkbox.
   b. Click the "User-specified lists" checkbox.
   c. In the "User-specified lists" select box, click **Add a press release: Your manager’s username**.



4. Click **Apply**.

   The new settings appear in the "Current access rights" table at the bottom of the page. Now, the entry creator and the manager he specified can view, modify, or delete the press release when the entry is in the **Draft** state.

   You must now give the entry creator’s manager permission to move the entry from the **Draft** to the **Review** state. *Only* the manager should have permission to do this.
5. In the "Specify access rights" table, in the "States" column, click **Draft**.
6. In the "Access rights" column, click **Change State (group 1)**.
7. In the "Users" column, do the following:
   a. Click the "User-specified lists" checkbox.
   b. Click **Add a press release: Your manager’s username**.
8. Click **Apply**.

The new access settings appear in the "Current access rights" table at the bottom of the right frame.

Current access rights

State	View	Modify or Delete	Respond	Change State (group 1)	Change State (group 2)
Draft	Entry creator Add a press release: Your manager's username	Entry creator Add a press release: Your manager's username	Forum default	Add a press release: Your manager's username	Forum default

Now, only the manager can approve the press release for review by moving the entry to the **Review** state.

Set Access for the Review State

To set access rights for the **Review** state, you select the Review Committee group that you created (page 22). Then, you specify who can view an entry, modify it, change its state manually, and answer the workflow question, "Is this document ready for legal review?"

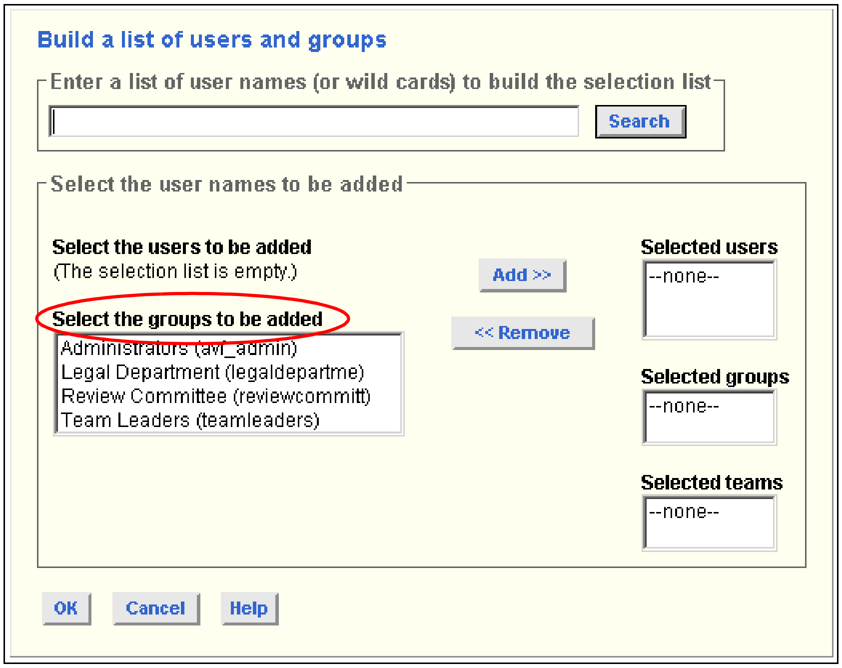
Select the Review Committee Group

To select the Review Committee group:

1. On the right side of the "Specify access rights" form, toward the bottom of the "Users" column, click the **Selected users and groups** link.

   This link opens a new window that allows you to select the Review Committee group.

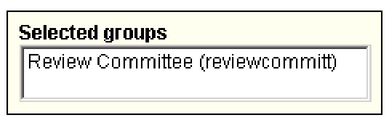
Because you already created these groups, the group names appear in the box below the "Select the groups to be added" header.



2 In the box, click **Review Committee**.

3 Click **Add**.

The group name appears in the "Selected groups" box to the right of the **Add** button.



4 Click **OK**.

5 View the "Set access rights for all states" form again.

At the bottom of the "Users" column, below the "Selected users and groups" link, the Review Committee appears.

Now you can specify that the Review Committee can work with entries in the **Review** state.

Specify Who Can View an Entry

After the manager moves an entry to the **Review** state, she and the entry creator should still be able to view the press release as it is being reviewed by the committee.

To set "View" access rights for the **Review** state:

1. In the "States" column, click **Review**.
2. In the "Access rights" column, click **View**.
3. In the "Users" column:
   a. Click the "Entry creator" checkbox.
   b. Click the "User-specified lists" checkbox, and click **Add a press release: Your manager's username**.
   c. Click the "Selected users and groups" checkbox (you selected the Review Committee in the previous section).
4. Click **Apply**.

The View access settings appear in the "Current access rights" table at the bottom of the page. The entry creator, his manager, and the Review Committee can all view an entry in the **Review** state.

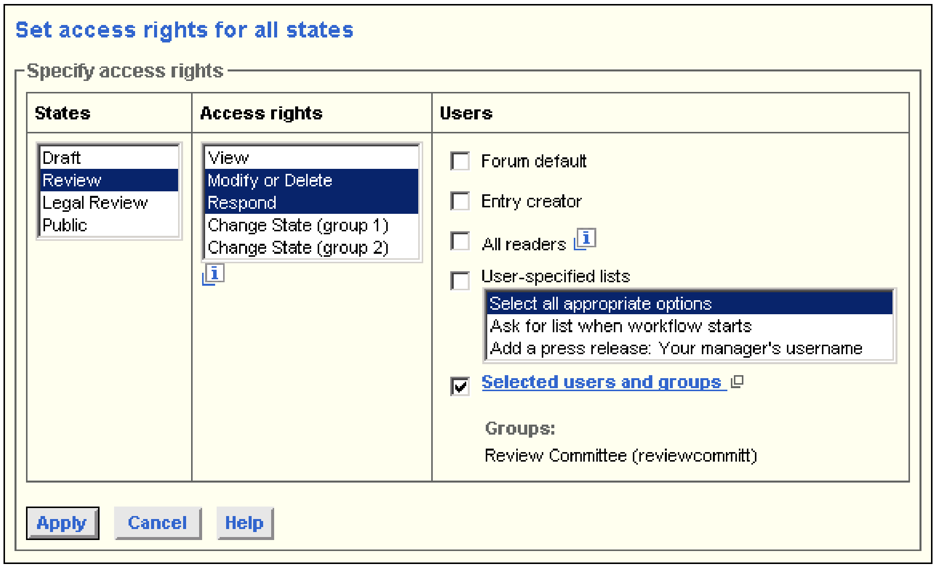
Specify Who Can Modify an Entry

You must allow the Review Committee to make changes to the press release.

To specify who can modify entries in the **Review** state:

1. In the "States" column, click **Review**.
2. In the "Access rights" column, Ctrl+click **Modify or Delete** and **Respond**.

3 In the "Users" column, click the "Selected users and groups" checkbox to select the Review Committee. (Only the Review Committee can make modifications and respond to the workflow question.)



4 Click **Apply**.

The new access settings appear in the "Current access rights" table at the bottom of the right frame.

You now must specify that only the committee leader can move an entry manually to the **Legal Review** state (overriding the decisions of the other committee members) or back to the **Draft** state for more revisions.

Specify Who Can Change the State of an Entry

Only the committee leader can change the state of an entry by making a manual transition. This means that the committee leader is the only one who sees a **Change state** drop-down menu on the entry page.

To specify this access setting:

1 Click the **Selected users and groups** (see page 37) link again.

2 In the new window, in the "Selected groups" box on the right side, click **Review Committee**.

3 Click **Remove**.

4 At the top of the window, in the "Enter a list of usernames..." text box, search for the committee leader's username by typing the first letter of the name followed by two asterisks:

```
c**
```

5 Click **Search**.

A box containing usernames appears below the "Select the users to be added" header.

6 In the box, click the username of the committee leader.

Select the users to be added

Chief Legal Counsel (legal)
Committee Leader (comlead)
Sara Chang (sara)

7 Click **Add**.

The committee leader's username appears in the "Selected users" box to the right of the **Add** button.

Selected users

Committee Leader (comlead)

8 Click **OK**.

9 View the "Set access rights for all states" page again.

10 In the "States" column, click **Review**.

11 In the "Access rights" column, click **Change State (group 1)**.

12 In the "Users" column, click the "Selected users and groups" checkbox to select the committee leader.

13 Click **Apply**.

The new access settings for the **Review** state appear in the "Current access rights" table at the bottom of the page.

Current access rights

State	View	Modify or Delete	Respond	Change State (group 1)	Change State (group 2)
Draft	Entry creator Add a press release: Your manager's username	Entry creator Add a press release: Your manager's username	Forum default	Add a press release: Your manager's username	Forum default
Review	Entry creator Add a press release: Your manager's username Review Committee (reviewcommitt) *Group*	Review Committee (reviewcommitt) *Group*	Review Committee (reviewcommitt) *Group*	Committee Leader (comlead)	Forum default
Legal Review	Forum default	Forum default	Forum default	Forum default	Forum default
Public	Forum default	Forum default	Forum default	Forum default	Forum default

Now, the entire committee can modify a press release and respond to the workflow question, but only the committee leader can manually change the workflow state of an entry.

Set Access for the Legal Review State

To set access controls for the **Legal Review** state, follow a similar procedure to that of the **Review** state:

1 Allow the Legal Department, the review-committee leader, and the entry creator to view entries in the **Legal Review** state:

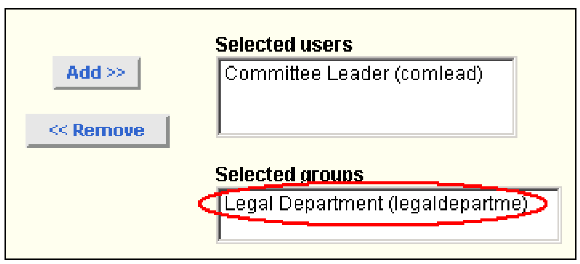
a Click the **Selected users and groups** (see page 37) link.

The committee leader's name remains in the "Selected users" box. You allow the committee leader to view (but *not* modify) entries in the **Legal Review** state. You must also give the Legal Department this access right.

b In the box below the "Select the groups to be added" header, click **Legal Department**.

c Click **Add**.

The group name appears in the "Selected groups" box to the right of the **Add** button.



d Click **OK**.

e View the "Set access rights for all states" page again.

f In the "Specify access rights" table, in the "States" column, click **Legal Review**.

g In the "Access rights" column, click **View**.

h In the "Users" column, click the checkboxes for "Entry creator" and "Selected users and groups."

i Click **Apply**.

2 Allow the entire Legal Department (but *not* the review-committee leader) to modify entries in the **Legal Review** state.

a Click the **Selected users and groups** (see page 37) link again.

The Legal Department group remains in the "Selected groups" box. You must now remove the committee leader.

b In the "Selected users" box, click the name of the committee leader, then click **Remove**.

c Click **OK**.

d In the "Specify access rights" table, in the "States" column, click **Legal Review**.

e In the "Access rights" column, click **Modify or Delete**.

f In the "Users" column, click the "Selected users and groups" checkbox.

g Click **Apply**.

3 Allow *only* the chief legal counsel to change the workflow state.

a Use the **Selected users and groups** (see page 37) link to remove the Legal Department from the "Selected groups" box and add the chief legal counsel to the "Selected users" box.

b Click **OK**.

c In the "Specify access rights" table, in the "States" column, click **Legal Review**.

d In the "Access rights" column, click **Change State (group 1)**.

e In the "Users" column, click the "Selected users and groups" checkbox to select the chief legal counsel.

f Click **Apply**.

Because you created manual transitions for this state, the chief legal counsel can move an entry to the **Public** state or back to the **Review** state for further review.

The new access settings for the **Legal Review** state appear in the "Current access rights" table at the bottom of the page.

Set Access for the Public State

To set access rights for the **Public** state, specify that all readers can view (and *only* view) entries. When a press release reaches the **Public** state, it is complete and does not need revisions.

To set access rights for the **Public** state:

1 In the "States" column, click **Public**.

2 In the "Access rights" column, click **View**.

3 In the "Users" column, click the "All readers" checkbox.

4 Click **Apply**.

Now, everyone can view press releases that are in the **Public** state.

5 To return to the workflow chart, click **Show whole workflow** on the toolbar.

Set E-Mail Notifications

As part of the workflow process, specified users can receive e-mail messages when an entry enters or leaves a specific workflow state, or when an entry is inactive for too long. By default, the e-mail message also contains a link to the discussion-forum entry.

This workflow must send out the three e-mail notifications you specified in your planning:

- Review Notification: "A press release is ready for review."
- Inactive Notification: "A press release has been inactive for two weeks."
- Legal Review Notification: "A press release is ready for legal review."

Review Notification

When an entry enters the **Review** state, the members of the Review Committee should receive an e-mail message.

To set this e-mail notification:

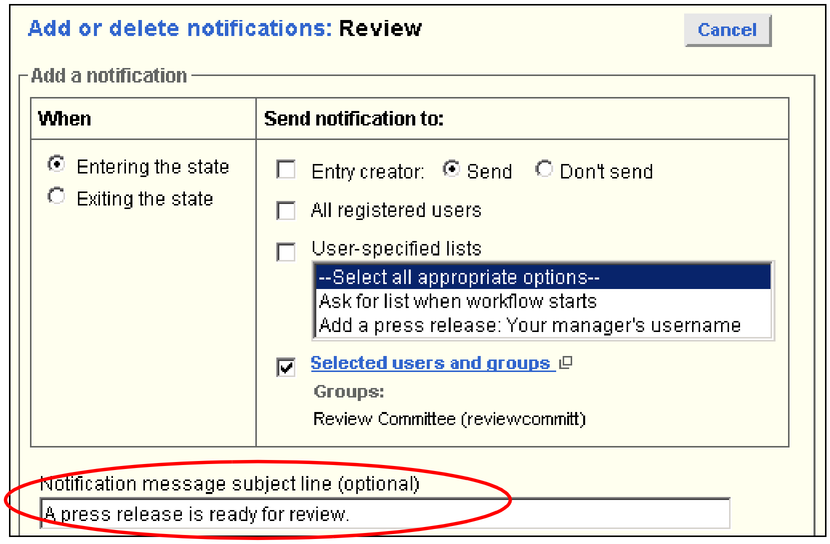
1. In the workflow chart, click **Review**.
2. In the left frame, click **Add or delete notifications**.

   The "Add or delete notifications" form appears in the right frame.
3. In the "Add a notification" table, view the "When" column and make sure that the radio button for "Entering the state" is on.

   You want the workflow to send e-mail notifications as soon as an entry enters the **Review** state.
4. Toward the bottom of the "Send notification to" column, click the **Selected users and groups** link.
5. Follow the same procedure you used with **Selected users and groups** (see page 37), but this time, choose the Review Committee group.
6. Click **OK** and view the "Add or delete notifications" form again.
7. In the "Send notification to" column, click the "Selected users and groups" checkbox to select the Review Committee group.

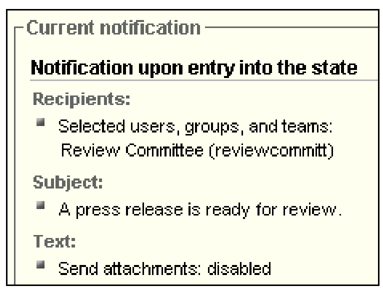
8 In the "Notification message subject line" text box, enter:

```
A press release is ready for review.
```



9 On the form, click **OK**.

The notification information appears in the "Current notification" table at the bottom of the right frame.



Now, when an entry enters the **Review** state, the members of the Review Committee receive e-mail messages alerting them that a press release is ready for review. The e-mail message also includes a link to the discussion-forum entry.

Inactive Notification

When an entry stays in the **Review** state for two weeks, the review-committee leader and the chief legal counsel must receive e-mail messages so that they can keep the process moving. To facilitate this, you create a new **Inactive** state, from which the workflow sends out the e-mail notification.

Creating this notification involves four tasks:

- Create the Inactive State (page 46)
- Create Transitions to and from the Inactive State (page 46)

- Set Access for the Inactive State (page 47)
- Set Notification for the Inactive State (page 48)

Create the Inactive State

To create the **Inactive** state:

1 In the left frame, click **Add or delete states, or modify the initial state**.

The corresponding form appears in the right frame.

2 In the "List the states to be added" text box, enter:

```
Inactive
```

3 Click **Add states**.

The workflow chart reappears, displaying the new state. You must now set the transitions to and from the **Inactive** state.

Create Transitions to and from the Inactive State

To add a transition to the **Inactive** state:

1 In the left frame, click **Add or delete transitions**.

The "Add or delete transitions" page appears in the right frame.

2 Toward the bottom of the "Define a new transition" area, just above the buttons, enter the number 14 in the "When no state change has occurred in ____ day(s)" box.

3 In the box on the right, click **Inactive**.

4 Click **Add transition and close**.

The transition appears in the workflow chart as an arrow from **Review** to **Inactive**. An entry moves from the **Review** state to the **Inactive** state if it has not changed state within two weeks.

You must now set transitions out of the **Inactive** state, so that the review-committee leader or the chief legal counsel can move the entry to another state.

To set the other transitions for the **Inactive** state, click the **Inactive** state in the workflow chart, and follow the same steps as before to set a manual transition for group 1 (see page 28). Set these manual transitions:

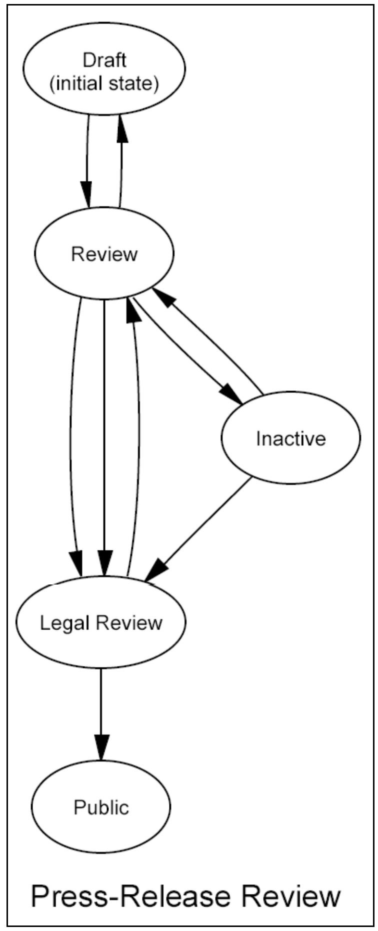
- From **Inactive** to **Review**

  The review-committee leader might want to insist that the review-committee members come to an agreement before the entry moves to the **Legal Review** state. Or, the chief legal counsel may send the entry back for further review, because the entry is not yet ready for review by the Legal Department.

- From **Inactive** to **Legal Review**

  The review-committee leader or the chief legal counsel might decide that the entry is ready for review by the Legal Department.

All transitions are now visible in the workflow chart.



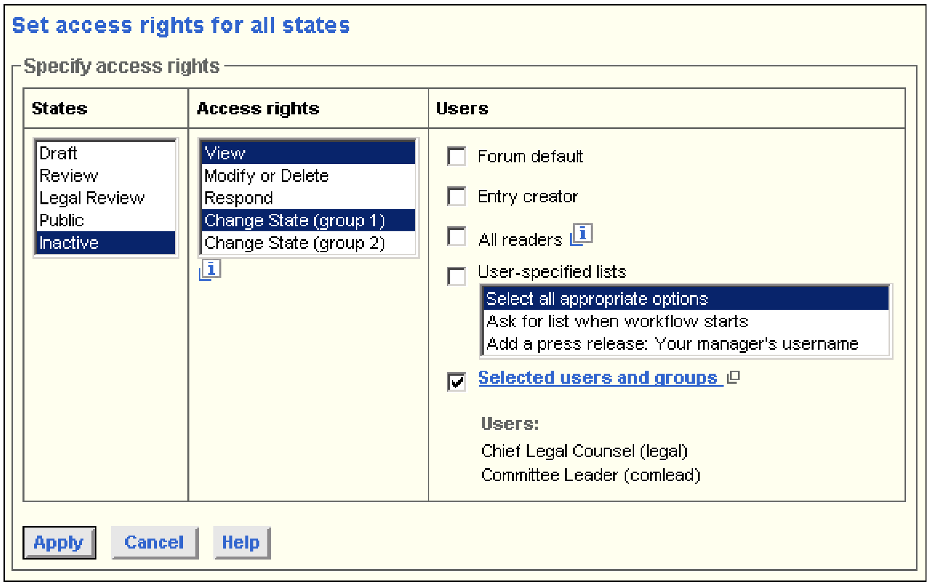
Set Access for the Inactive State

The committee leader and the chief legal counsel need access to view and change the state of entries in the **Inactive** state.

To set access for the **Inactive** state:

1. In the left frame, click **Set access rights for all states**.
2. Use **Selected users and groups** (see page 37) to select the committee leader and the chief legal counsel.
3. Allow only those two users the access rights to view entries and change the state.

The form now looks like this.



4 Click **Apply**.

The new access settings appear in the "Current access rights" table at the bottom of the page.

Now, when the committee leader and the chief legal counsel receive an e-mail notification that an entry is inactive, either of them can move the entry from the **Inactive** state to the **Review** state or to the **Legal Review** state.

Set Notification for the Inactive State

To set the e-mail notification:

1 In the left frame, click **Add or delete notifications**.

The "Add or delete notifications" page appears in the right frame.

2 In the "Add a notification" table, view the "When" column and make sure that the radio button for "Entering the state" is on.

3 Use the **Selected users and groups** link to specify the committee leader and the chief legal counsel. Remove any other users or groups from the "Selected users" and "Selected groups" boxes.

4 Click **OK** and view the "Add or delete notifications" page again.

5 In the "Send notification to" column, click the "Selected users and groups" checkbox to select the users you just specified.

6 In the "Notification message subject line" text box, enter:

```
A press release has been inactive for two weeks.
```

7 Click **OK**.

The notification information appears in the "Current notification" table at the bottom of the page.

Legal Review Notification

When a press release enters the **Legal Review** state, the members of the Legal Department must receive an e-mail message.

To set this notification, view the workflow chart and click the **Legal Review** state. Follow the same procedure that you used in the "A press release is ready for review" section (see page 44), with these changes:

- When you click the **Selected users and groups** link, specify the Legal Department group, and remove any other users or groups.
- In the "Notification message subject line" text box, enter:

```
A press release is ready for legal review.
```

The notification information appears in the "Current notification" table at the bottom of the page.

Now, when you click a state in the workflow chart, information about the transitions, access controls, and any workflow question or e-mail notification for that state appears in the left frame.

Now that you have created the **Press-Release Review** workflow process, you want to have users start the workflow automatically every time they add a press release. The next chapter describes how to associate the **Add a press release** command with this workflow process.

Chapter 5: Connecting the Command with the Workflow

Now that you have created the **Press-Release Review** workflow process, you can associate it with the new command, so that users who click **Add a press release** automatically start the workflow process when they create an entry. This chapter describes how to do this, and also provides instructions for further customizing the discussion forum and the command, testing your work, and finally exporting the customization to a different forum for general use.

The tasks described in this chapter include:

- Associate the Command with the Workflow (page 51)
- Hide the Author's Name from Reviewers (page 52)
- Test the Command (page 52)
- Export the Command and Workflow to a Different Forum (page 53)
- Disable Standard Commands (page 52)

Associate the Command with the Workflow

When you associate the command with the workflow process (see "Creating a Workflow Process" on page 19), users who choose **Add a press release** from the **Add** menu automatically start the **Press-Release Review** workflow process.

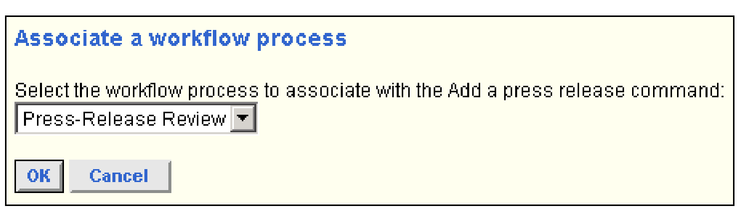
To associate the command with the workflow process:

1 From the workflow UI, access the command UI by clicking on the **Develop commands interactively** tab in the top frame.

2 Click the "Add a press release" radio button, then click **Modify**.

3 In the left frame, below the "Edit the command" header, click **Associate a workflow process with this command**.

A drop-down menu appears in the right frame.



4 In the drop-down menu, click **Press-Release Review**.

5 Click **OK**.

The text "Associated workflow process: Press-Release Review" appears just below the "Lay out the command" header. The command is now associated with the **Press-Release Review** workflow.

Hide the Author's Name from Reviewers

Suppose that you do not want the author's name to be visible when an entry is in the **Review** or **Legal Review** state. You reason that if the reviewers are not sure of the author's identity, they will be more objective in their review.

To hide the author's name when an entry is in the Review state:

1 In the "Lay out the command" table in the right frame, click the radio button of the "Text box" element for specifying the author's name.

2 Click **Modify/view**.

The "Modify element..." table appears in the right frame.

3 In the Visibility column, use Ctrl+click to select the **Draft** and **Public** states. Both states should be highlighted.

4 Click **OK**.

The "Author's name" element is now visible only in the states you selected. It does not appear when an entry is in the **Review**, **Legal Review**, or **Inactive** state.

Test the Command

As you are building a new command, you can use the **Preview** link on the toolbar to test it. This link displays the "Add a press release" form in a new window. To see the current view of an entry page in the discussion forum, complete the form in the new window and click **OK**. The new entry appears in that window.

You can use **Preview** to test the command in this way after you add each element. Entries that you create using the new window remain in the discussion forum.

Export the Command and the Workflow to a Different Forum

After creating and testing this customization, you may want to export it to another forum for general use. You do this using the **Import/Export** feature. First, you export the command and the workflow from the discussion forum that contains them. Then, you import them into the new forum.

To export the command and the workflow process:

1. In the upper-right corner of the command UI, click the link to return to the "Press-Release Test" forum.
2. On the toolbar, click **Tools**.
3. Click **Import/export**.

   The "Import or Export Forum Entries" page appears.
4. Click the radio button next to "Export selected templates, commands, workflow and attribute definitions."
5. Click **OK**.
6. Click the checkboxes of the command and workflow: **Add a press release** and **Press-Release Review**.
7. Click **OK**.
8. Click **OK** again, then save the file to your computer.

   You can rename the file `file.export`, or give it another name that is easy to remember.

   Forum saves the file to your computer.
9. Click **Close** to return to the discussion forum.

To import the command and the workflow process to the new discussion forum:

1. Enter the new discussion forum.
2. On the toolbar, click **Tools**.
3. Click **Import/export**.

   The "Import or Export Forum Entries" page appears.
4. Click the radio button next to "Import all custom command, workflow, template and attribute definitions."
5. Click **OK**.
6. On the page that appears, click the **Browse** button and locate the file containing the workflow and command that you exported to your computer.
7. Click **OK**.
8. Click **Close**.

9 In the new discussion forum, click the **Tools** menu and choose **Administration**.

The "Discussion-forum management" page appears.

10 In the row titled "Customize commands and workflows in this forum," click **Develop commands interactively**

11 Click on the radio button next to the **Add a press release** command, and then click **Modify**.

12 Associate the command with the **Press-Release Review** workflow again (see page 51).

The customization is now available for use in the new discussion forum.

Disable Standard Commands

You can now set up the discussion forum so that **Add a press release** is the only command that appears on the **Add** menu. You do this by disabling the standard **Add** commands.

To disable standard commands:

1 In the top frame of the command UI, click **Close**.

The discussion-management menu appears.

2 Below the header "Customize commands and workflows in this forum," click **Modify standard menu commands**.

The "Add or modify forum menu commands" form appears.

3 Click each checkbox except for the "Reply" checkbox and the "Attach files" checkbox.

Leave these features enabled, so that users who are reviewing the press release can attach edited versions of it and add their comments as replies.

4 Just below the checkboxes, click **Apply**.

5 Click **Close**.

The standard commands that you cleared are now disabled. Users who enter this forum willl see only the **Add a press release** command on the **Add** menu. (The forum manager will also see the **Add folder** command.)

6 To return to the forum, click **Close**.

After the new command and the workflow are in general use, you are not finished! It is vital that you continue to solicit and use the feedback of people who regularly use the workflow and the command. The next chapter suggests ways of doing this and describes some examples of revisions to your customization.

Chapter 6: Getting Feedback and Making Revisions

Before creating the workflow and the new command, you spoke with users to collect information about the work they do (the content) and the way they do it (the process). While you were developing the workflow and the new command, you allowed a number of users to review the work-in-progress and offer suggestions. Now that your customizations are "live" and people are using them, it is important that you stay informed about your users' experience and any changes in their work.

One way to do this is to sit with users, observe them using the workflow process and the new command, and note any problems or questions that they may have. It is also useful to set up a discussion forum where users can post their comments and suggestions about current workflow processes and commands. You may want to set aside time at a meeting to brainstorm about possible new customizations. After receiving feedback from users, consider the changes you want to make, and return to the workflow and command definition pages.

Suppose that some press releases concern the product, while others focus on financial information about the company. You want to add a "Release type" element to the **Add a press release** command. The "Release type" element requires the entry creator to choose whether the entry is a product release or a financial release. If the entry is a financial release, it moves to a new **Financial Review** state, instead of the regular **Review** state.

This chapter describes the tasks involved in making this revision:

Add the "Release type" Element

To add the "Release type" element:

1. In the discussion forum, click the **Tools** menu, then click **Administration**.

   The "Discussion-forum management" page appears.

2. Under "Customize commands and workflows....," click **Develop commands interactively**.

   The command user interface appears.

3. Click the "Add a press release" radio button.

4 Click **Modify**.

The "Lay out the command" table appears in the right frame.

5 In the left frame, below the "Add HTML layout elements" header, click **Select box**.

6 In the Caption column, enter:

```
Release type
```

7 In the "Options" column, click the "User input required" checkbox.

8 In the "Selection items" box, enter (on separate lines):

```
Product release
Financial release
```

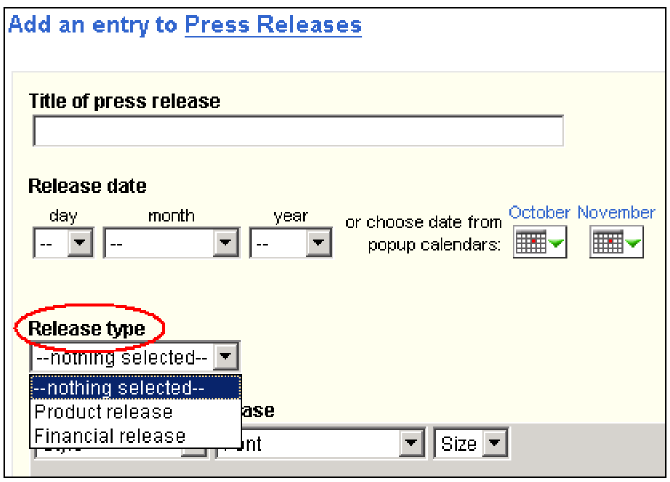
9 Click **OK**.

The "Select box" element appears at the bottom of the "Lay out the command" table in the right frame.

10 To change the position of the release type in the command, use the **Move up** and **Move down** buttons as you did on page 18. Move the new "Select box" element up 7 spaces to position it below the release date.

11 On the toolbar, click **Preview** to see the revised "Add a press release" form.

The "Release type" element is now visible on the form.



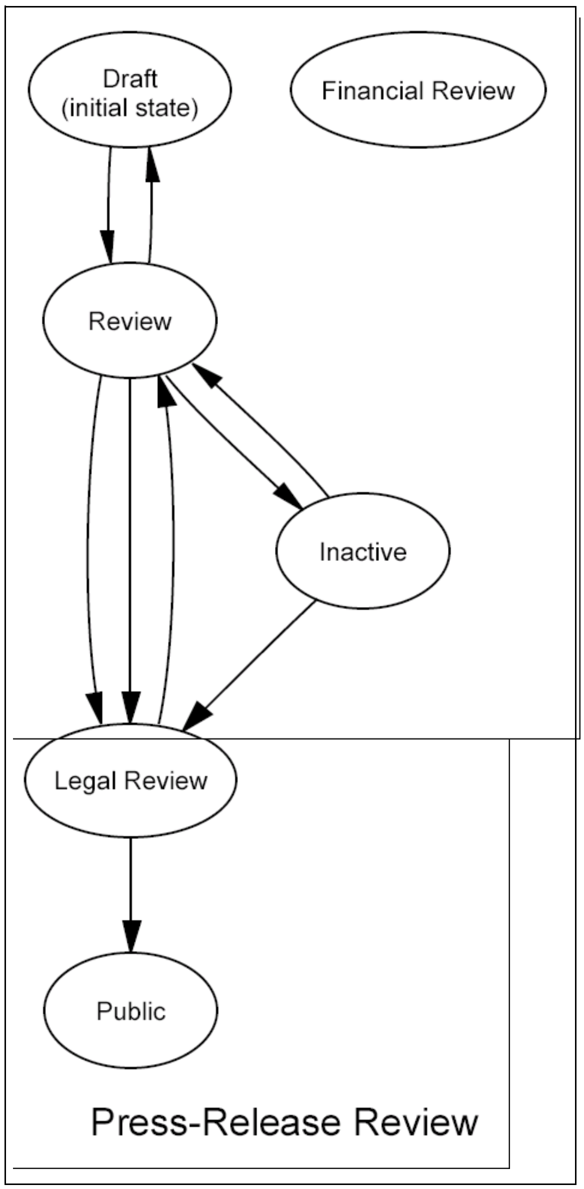
Now, when someone adds an entry, they must specify whether the press release is a product release or a financial release.

Add the Financial Review State

Suppose that financial releases require a separate Financial-Review Committee. In this case, you must add a **Financial Review** state to the workflow, and then allow only the financial-Review Committee to access entries in the **Financial Review** state.

To add the **Financial Review** state, click the **Develop workflow processes** tab in the top frame to return to the workflow UI, and follow the same procedure that you used when you added the **Inactive** state on page 46.

Initially, the **Financial Review** state appears separate from the workflow process because it has no transitions.



To define a transition to the **Financial Review** state, you use the new "Release type" element from the command.

Use "Release type" to Transition to Financial Review

You want financial releases to move to the **Financial Review** state, and product releases to move to the **Review** state.

Before you can set up these transitions, you must define two new conditions (see page 31). The conditions check the value of the "Release type" element ("Product release" or "Financial release").

After you define the conditions, you create two transitions that use them.

Define New Conditions to Check the Release Type

To define conditions that check the "Release type" element:

1 In the left frame, click **Add, modify, or delete conditions**.

The "Add, modify, or delete conditions" form appears in the right frame.

2 At the bottom of the form, click **Add condition**.

The "Add a condition" form appears.

3 In the "Condition name" text box, enter:

```
Entry is a financial release
```

4 Toward the bottom of the form, click the "Include a search query" checkbox.

5 Click **OK**.

The "Search text" table appears in the right frame.

6 In the left column, look for the "Qualifiers for entry type" box and click the "Add a press release" checkbox.

7 In the box to the right, in the "Release type" select box, click "Financial release."

The workflow checks if the user has specified that the entry is a financial release. If so, this condition is true.

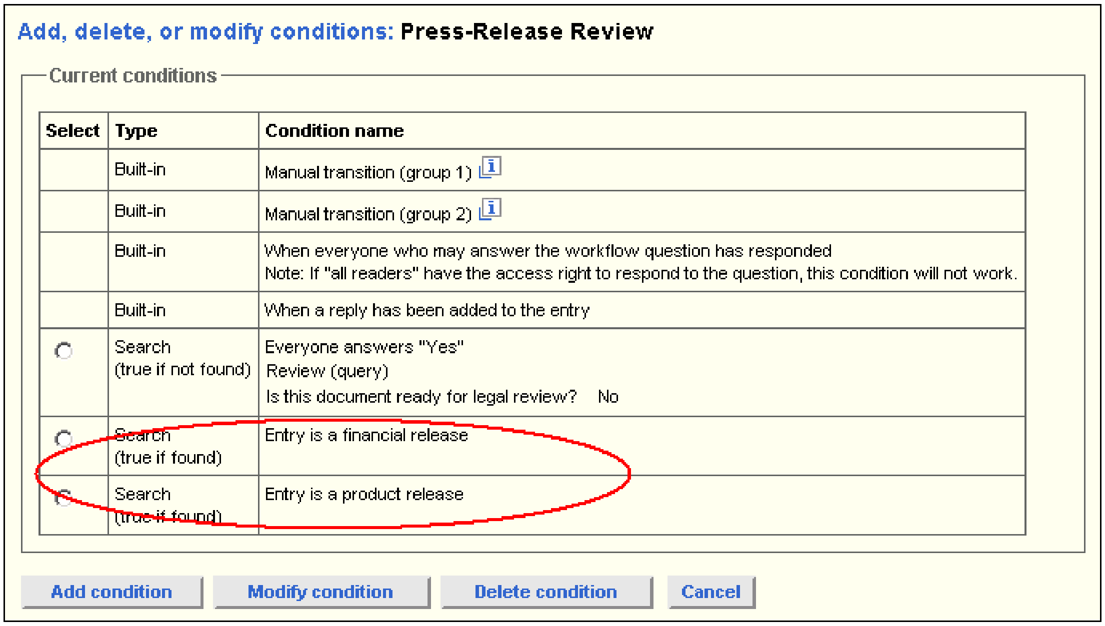
8 Click **OK**.

The "Add, modify, or delete conditions" form reappears, displaying the new condition.

9 To define the second condition, follow the steps above, with two differences:

- Step 3: Name the condition: `Entry is a product release`
- Step 7: In the "Release type" select box, choose **Product release** instead of **Financial release**.

The new conditions (circled in the picture) appear on the "Add, modify, or delete conditions" form.



Add, delete, or modify conditions: **Press-Release Review**

Current conditions

Select	Type	Condition name
	Built-in	Manual transition (group 1)
	Built-in	Manual transition (group 2)
	Built-in	When everyone who may answer the workflow question has responded Note: If "all readers" have the access right to respond to the question, this condition will not work.
	Built-in	When a reply has been added to the entry
○	Search (true if not found)	Everyone answers "Yes" Review (query) Is this document ready for legal review? No
○	Search (true if found)	Entry is a financial release
○	Search (true if found)	Entry is a product release

Add condition | Modify condition | Delete condition | Cancel

You can now use the conditions to define whether a press release moves to the **Review** state or to the **Financial Review** state.

Define Two New Transitions

To define transitions that use the new conditions:

1 On the toolbar, click **Show whole workflow**.

2 In the workflow chart, click the **Draft** workflow state.

3 In the left frame, click **Add or delete transitions**.

The form for adding transitions to the **Draft** state appears in the right frame.

4 In the "Select the conditions..." box, Ctrl+click **Manual transition (group 1)** and **Entry is a financial release**.

Both conditions must be true for this transition. The entry creator can decide when to make the manual state change, but, for financial releases, he can move entries to **Financial Review** only.

5 In the box to the right, click **Financial Review**.

6 Click **Add transition and continue**.

The new transition appears in the "Current transitions" area at the bottom of the form.

7 In the "Select the conditions..." box, Ctrl+click **Manual transition (group 1)** and **Entry is a product release**.

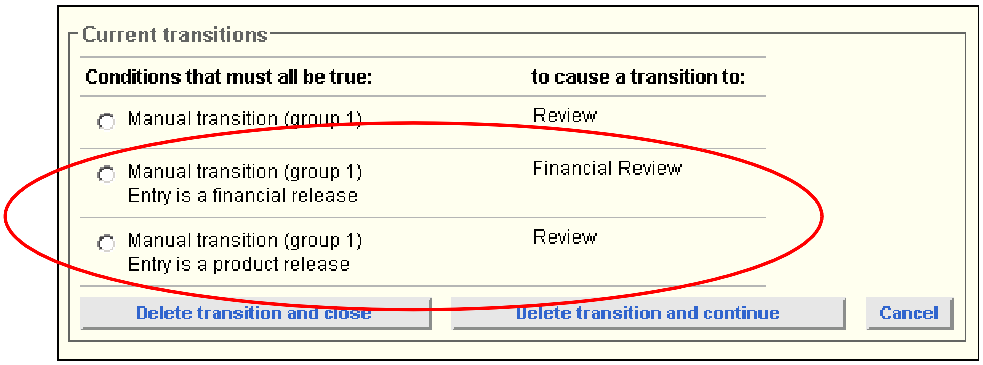
As with the previous transition, both conditions must be true:

- The entry must be a product release.
- The entry creator can control the transition manually.

8 In the box to the right, click **Review**.

9 Click **Add transition and continue**.

Both transitions appear in the "Current transitions" table at the bottom of the form.



You must now delete the original manual transition. Otherwise, the workflow allows releases to move to the wrong state.

10 Click the top radio button in the "Current transitions" table.

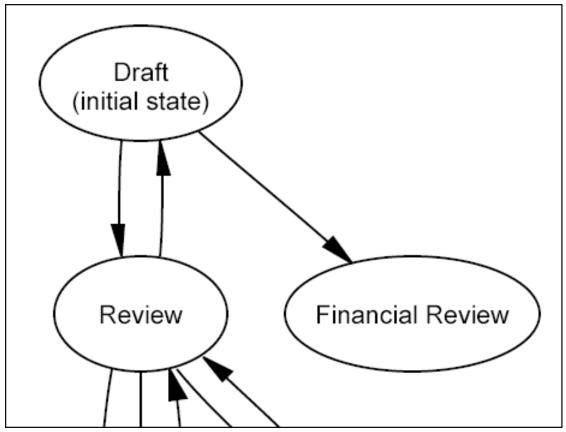
11 Click **Delete transition and continue**.

The table reappears. The original manual transition is no longer present.

Now, if an entry in the **Draft** state is a product press release, the only choice on the **Change state** menu is **Review**. If the entry is a financial press release, **Financial Review** is the only choice.

Integrate New Components

At this point, when you view the workflow chart, the new transition appears as an arrow from the **Draft** state to the **Financial Review** state.



The flow chart is still incomplete. To integrate the **Financial Review** state with the rest of the workflow, use the tools for editing the current state, as you did when you created the other states:

- "Define the Flow of Work" on page 28

  To which states can an entry move from the **Financial Review** state? Back to **Draft**? Forward to **Legal Review**? Do you want to use a workflow question? What conditions are necessary for an entry to leave this state? Do you need to define any new conditions in order to set up the state transition?

- "Set Access Rights" on page 35

  Who can view this state? Do you need to specify the usernames of the members of the financial Review Committee? Who can make modifications? Who can answer a workflow question? Who can change the workflow state?

- "Set E-Mail Notifications" on page 44

  Who should receive e-mail notifications when an entry enters this state? What information must you include in the e-mail message?

SiteScape recommends that you experiment with these tasks. As you become more familiar with them, you can create more complicated and intricate workflow processes.

Chapter 7: Next Steps

As we have seen, you can use workflow and new commands to enable users to add powerful and varied forum entries that move through complex processes. However, in some situations, the interactive user interfaces are not sufficient. In these cases, you may prefer to use *templates*. For example:

- You might want to use a more sophisticated layout.

  Perhaps you want to include several complex tables in the new command, so that users can enter many different types of data. In this case, using the "General-purpose elements" list in the interactive user interface can become tedious. Also, you may want to change the default formatting of certain elements (such as "Add attachments" or radio buttons), or set up different layouts for the add-entry form and the entry page. You cannot do these things using the interactive user interface.

- You might want to vary a custom-command element based on server data that is unrelated to a workflow process.

  For example, you might want the new command to display a menu, label, select box, or any other element, based on the current user's membership in a group. In the **Add a press release** example, a template could check to see if the user is in the Accounting or Engineering group, and then display a "Financial release" or "Product release" label accordingly.

Templates give you more precise control over the appearance of the add-entry form and the entry page. Using templates, you can specify the exact HTML necessary to get the total effect that you desire. SiteScape's prepackaged customizations, such as the help desk, resume tracker, and instant poll, are template-driven. You can customize an existing template to your own specifications, or you can create and upload a new template. (Working with templates requires some programming experience and some knowledge of `Tcl` code.)

Like the interactive user interface, templates have some limitations. For example, many of the forms used in the product do not have corresponding templates. Instead, they include support for *object overloads*, allowing you to implement customizations by working with Forum source code and Toolkit commands. Also, if your goal is to apply the same customization to, for example, all discussion forums in a zone, and if that customization can be implemented using an object overload, it is often easier to use the overload instead of templates.

When object overloads are required, many SiteScape customers prefer to contract with SiteScape Support to provide the overloads or to assist with creating them.

For support assistance, help in developing customizations, or additional documentation, customers with maintenance can access these forums:

Support:

Forum: http://support.sitescape.com/forum/support/dispatch.cgi/support

WebWorkZone: http://support.sitescape.com/forum/support/dispatch.cgi/wwzsupport

Help: http://help.sitescape.com/

Customization: http://support.sitescape.com/forum/support/dispatch.cgi/custom

For more information about working with templates or object overloads, visit the Support forum, download the Template Help installer or the Toolkit Help installer, and install one or both of these Help systems. You can then access the Template or Toolkit Help by viewing the Manager Help system and clicking on the appropriate button in the upper-right corner of the Help window.

If you prefer, you can access this information from the Help web site.

Glossary

access control

Rules that specify which users and groups are allowed to perform specific actions in Forum. In workflow, access control allows you to specify, for each state, which users and groups are allowed to respond to workflow questions, view an entry, modify an entry, or change the state of an entry.

add-entry form

The form that a user must complete in order to create an entry in a forum.

command

An item on the Add menu in a discussion forum that collects and displays the type of data that the discussion-forum manager wants.

condition

A reason for an entry to change workflow state. Some conditions are built-in (available with every workflow), such as "Manual transition" and "A reply is added to the entry." You can also define new conditions.

element

An item that can be part of the definition of a new command for the Add menu in a discussion forum. Elements include labels, text boxes, radio buttons, file upload boxes, and more.

entry page

The page in the discussion forum on which an entry is displayed.

Import/export

A method for copying new commands, workflow processes, entries, and more information from one discussion forum to another.

notification

An automatic e-mail message sent by Forum when an entry enters or leaves a specific workflow state. When you define the workflow process, you specify who receives notifications and when they are sent.

state

A specific step in a workflow process. For example, a document-review workflow might include states called "In Review" and "Public."

transitions

Rules that define how an entry can move from one workflow state to another. Transitions are defined by conditions and destination states. For example, you can specify that an entry should move to a different workflow state when someone adds a reply to it.

workflow process

An online representation of work that is done regularly in your organization.

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