Launching a Workflow: Submitting the Template to Workflow

Before a template can "go live", it must submitted to the Workflow. This is the first step in the Workflow process. The second step is to send it through the Workflow (refer to the Launching a Workflow instruction sheet).

The Pre-Workflow process consists of saving the file and choosing the Contributor, Approver and Publisher. You may have rights to all of them or just one.

Instructions:

Pre-Workflow Process

1. Once you've submitted a template, a window will open with the question, "Would you like to regenerate this file now?" (See Figure 1)
   - If you've already previewed the page, you can click No and skip this step.
   - If you've not previewed the page, you can click Yes to see your page (and it will automatically be saved).

2. The Edit Menu Topic window will open. Leave the settings as they are and click Next.

3. The Single Approver window will load. (See Figure 2)

4. Select the Contributor, Approver and Publisher (individual or group). An asterisk (*) indicates that this is a requirement of the Workflow process.
   - Tip: Pressing the Shift key allows you to select more than one individual for each role.
   - Tip: When selecting each role, click on any name and type the first letter of the name you wish to select. This will take you directly to the first name of the person that begins with this letter. If the person you are looking for is, for instance, the third person in this letter category, you would click 3 times to go to that name.

4\. Type a description of the file and/or a note to the Contributor, Approver or Publisher.

5\. Click the Start job button in the lower right of the screen. This window will close. You've created a job and you're ready to complete the Workflow process.

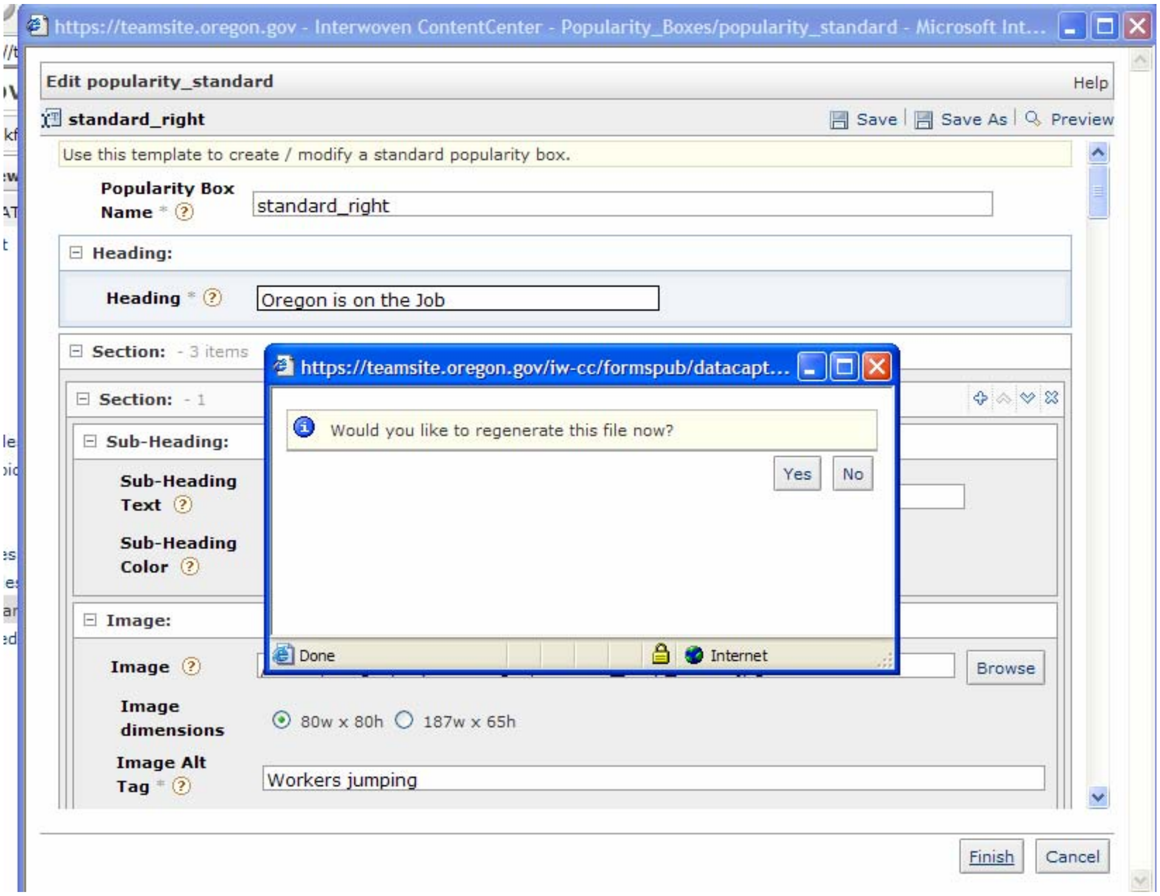

Figure 1 – Would you like to regenerate this file now?

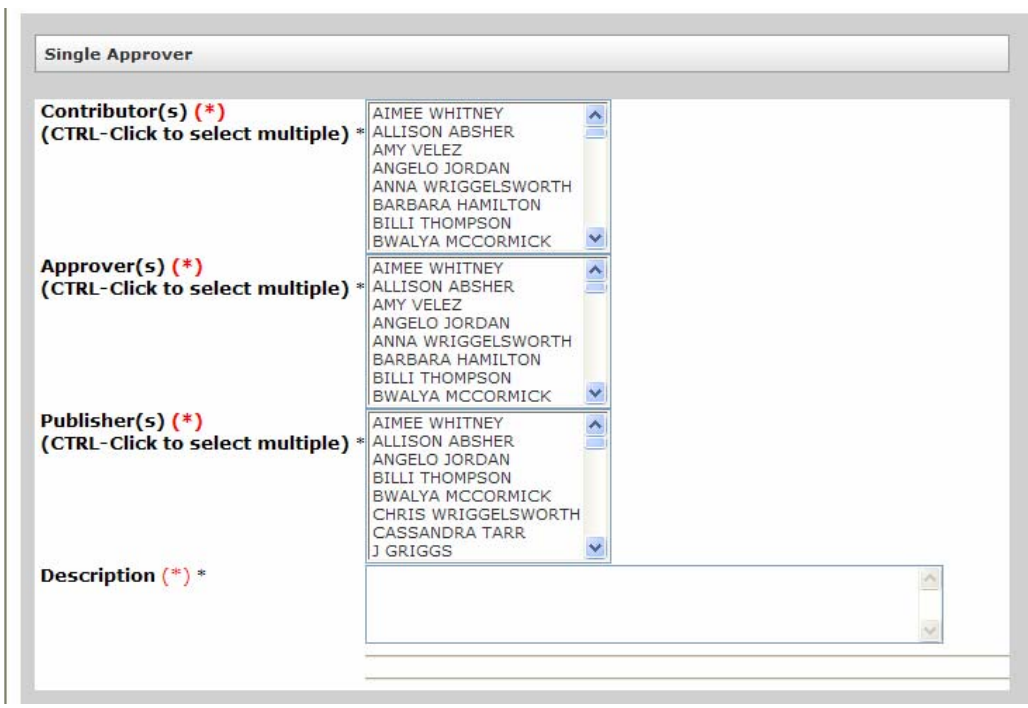

Figure 2 – Single Approver Window