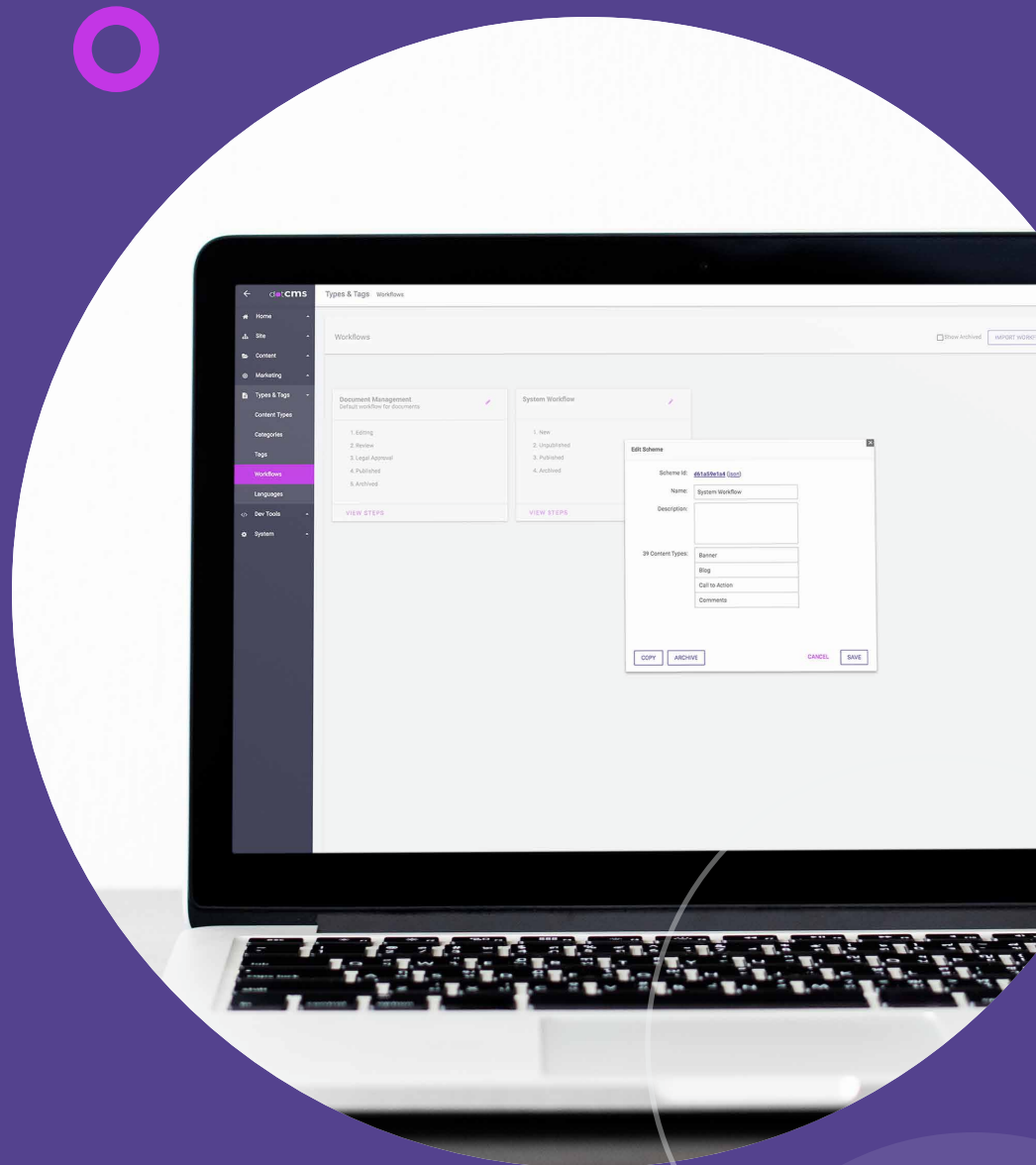




dotCMS Product Brief

# Content Approval & Publishing Workflow Module

Trusted, Continuous & Connected  
Customer Experiences



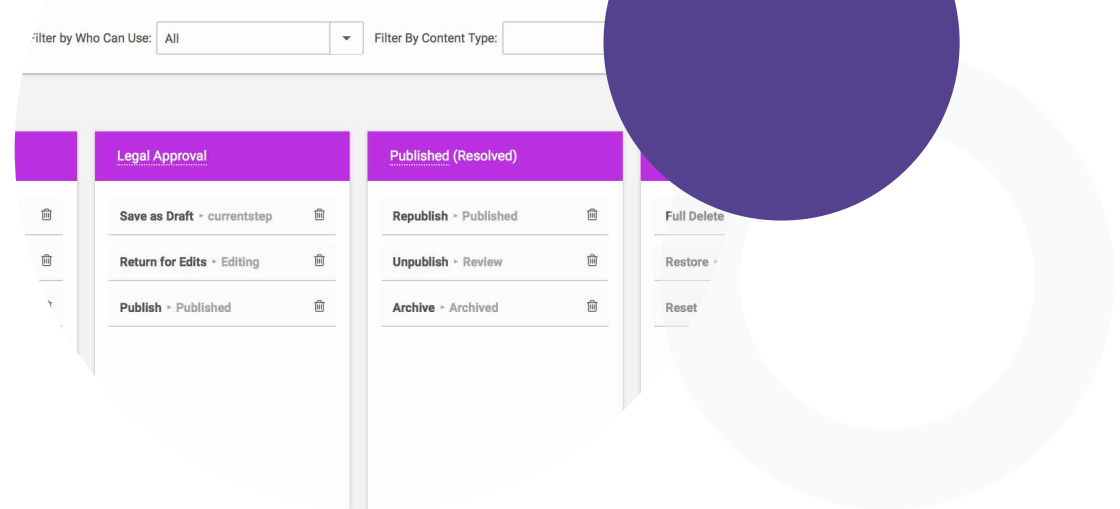
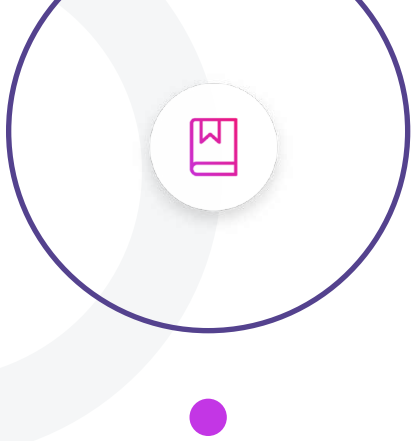


## Inside the Brief

The Workflow Management Module of **dotCMS** allows enterprises to increase efficiencies and velocity in their content editorial & publishing process and enforce governance & compliance at the same time. The Workflow Management Module is based on the open standards and API's of dotCMS's architecture and allow for maximum interoperability and extensibility with adjacent business applications in your ecosystem. Creating & managing complex, multi-step and parallel workflows doesn't require any coding and follows the NoCode pillar of our product.

### Key Benefits

- Tailored to your **governance & compliance** standards
- **NoCode** leads to higher content velocity
- Time-to-market and low Total-Cost-of-Ownership
- Full integration with **flexible publishing framework**
- **Bi-directional interaction** with external applications



# Content Approval & Publishing Workflow

## Content Governance

Any business is digital and exposing its corporate and marketing content on the various touchpoints that are currently out there. With the rise of the Internet of Things (IoT), this number will exponentially increase and puts higher demands on enterprises with regards to the production of content. The need for content velocity is increasing. And for companies operating in a controlled content industry like pharmaceutical, medical devices, and the likes,

creating content is subject to strict governance and approval before publishing due to increased risk exposure. **Creating and publishing content has become an integral part of any business.**

**dotCMS offers a content approval workflow and publication module that mitigates these risks and delivers the maximum content velocity.**

At the same time, NoCode eliminates the need for Java development.

# Workflow Essentials

In dotCMS, the workflow consists of three key items: **Schemes, Steps and Sub Actions**. They are the foundation for any workflow one can build in dotCMS. **A workflow can be applied to any content type** (documents, assets, videos etc.) **in dotCMS and has no limitations** in the number of steps and/or actions within a step. This allows for optimal fit for any business process.

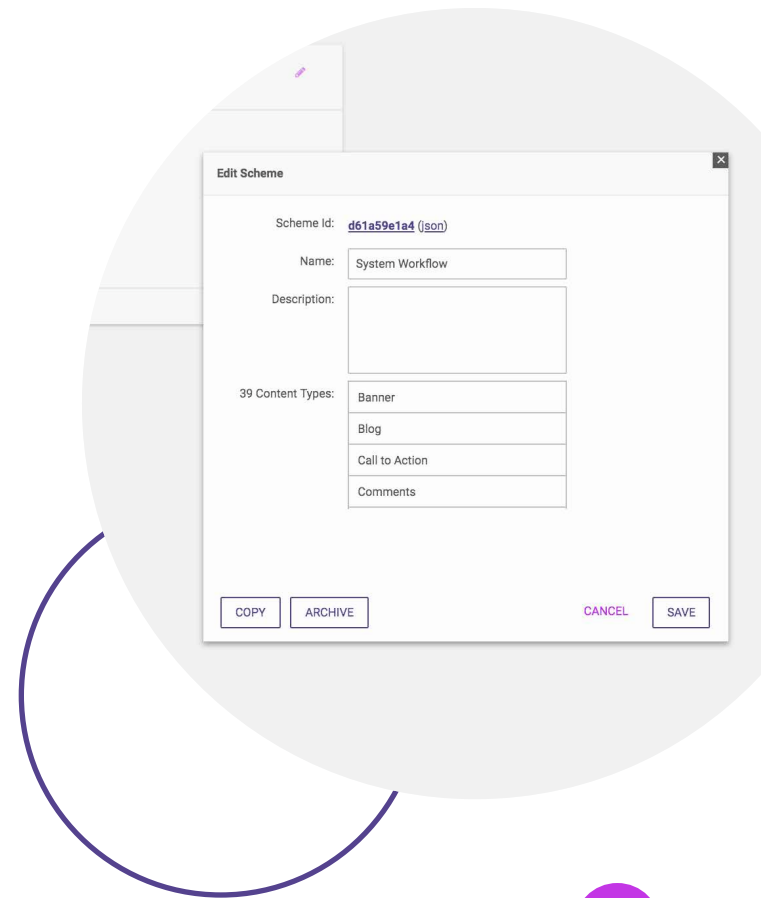
**A workflow can be applied to any content type in dotCMS and has no limitations in the number of steps and/or actions within a step.**

## 01. Schemes

dotCMS offers two default schemes as blueprints for custom workflows: **Default and Document Management**. Both schemes consist of a number of **steps and actions**. A scheme has a number of properties such as name and description and the option to (un)archive.

## 02. Steps

A step in a workflow scheme **has a name and an order** in the scheme that can be set. A step can also contain scheduled actions (publishing, Safe as Draft, Return for Edits) where the interval for scheduling can be set at any convenience.





### 03. (Sub)Actions

A step can have multiple Actions and Sub-actions defined that need to be executed before moving to the next step in the workflow scheme. For each action you can define:

- **To whom it can be assigned** (group or individual user).
- **What the next step** in the workflow scheme is.
- **Allow for comments.**
- **Allow for custom code.**
- **Add one or more sub-actions.**

dotCMS comes with a number of out-of-the-box (sub) actions, such as Archive, Save, Publish and Delete Content. A full overview<sup>1</sup> of the standard sub-actions is available.

## Four-eyes

If multiple eyes (four or more) are required in an action, this can be specified. **The workflow action is then offered to multiple users and requires that each of them take the action** before the following sub-actions are performed and before the content is moved into the “Next Step” specified in the Workflow scheme.

## Notifications

Core in the workflow module is the capability for flexible notifications. Out-of-the-box, dotCMS offers email and SMS, but **the notification mechanism is extensible to any API-driven messaging application, such as Slack.** The workflow module also offers personalized notifications to increase editorial engagement.

Sub-action

ADD WORKFLOW SUB-ACTION

- Save content
- Delete content
- Message
- Notify Users
- Link Checker
- Notify Users
- Reindex content
- Lock content



## Publishing

Content approval and publishing of content go hand-in-hand. In dotCMS publishing is integrated into the workflow module as a **Sub-Action** and content teams have various options for publishing:

- **Publish:** immediate publishing.
- **Push Now:** push to default environment.
- **Push Publishing<sup>2</sup>:** publish to one or more environments.

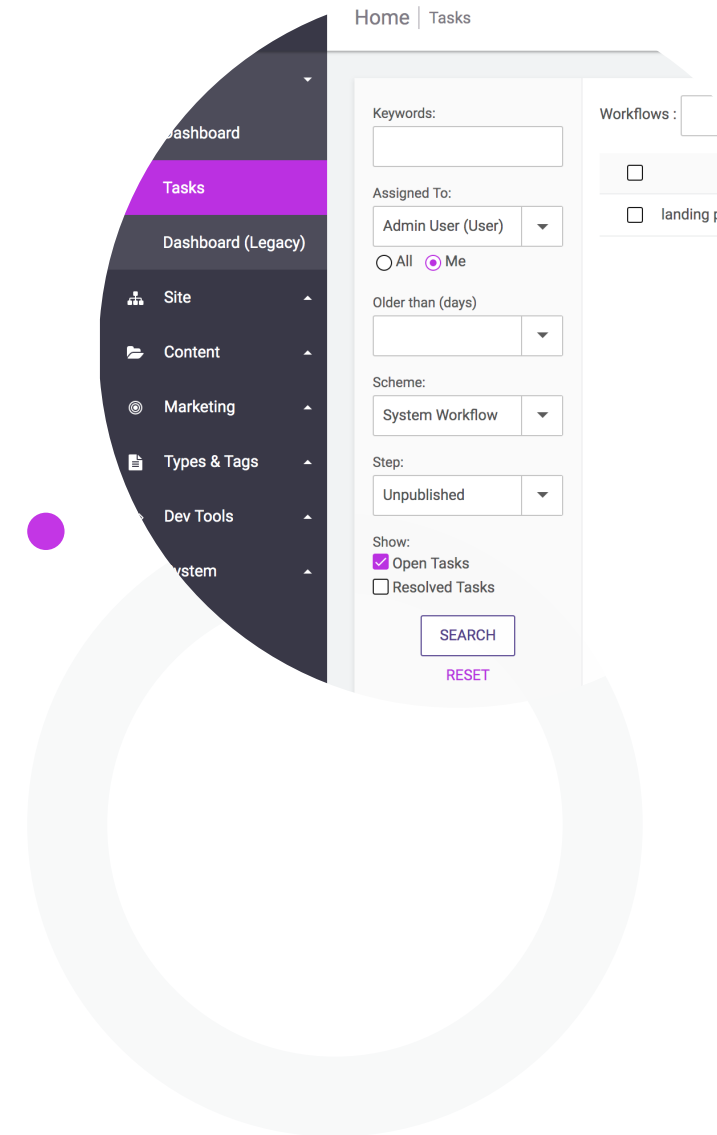
The latter variant can be leveraged for both **dynamic and static publishing** and offers a maximum publishing infrastructure fit that is unprecedented by our competition.

## Bundles

dotCMS offers the capability of bundles. It allows for content teams to **package content objects for later processing** (such as Push or Push Publishing) and drive content velocity and efficiency<sup>3</sup>.

## Workflow Tasks

For larger deployments of dotCMS is not uncommon to have a multitude of workflow schemes implemented and active. In order to **keep an overview of the content management process**, the Workflow Module comes with the notion of **Tasks**. It allows the content manager to have **actionable insights and see for a specific content type** where in a workflow the content sits. For planning purposes, this can help to select and progress some of these content objects and move them to the next step of the workflow process.



## Extensibility

The workflow module offers great extensibility for development teams to fit any business requirement your organization might have. The standard set of Actions and Sub-actions can be **extended with custom (Sub) actions in two ways:**

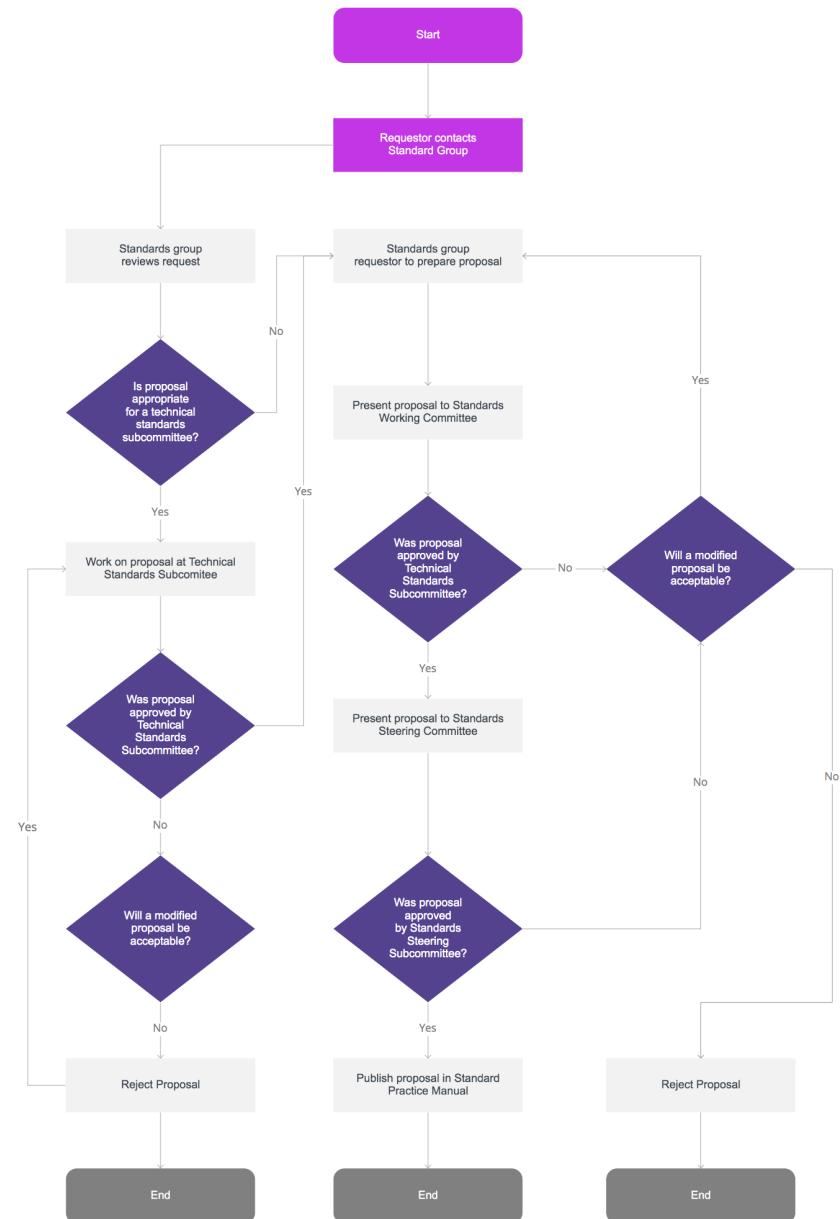
- Creating (sub) actions using **OSGi plugins<sup>4</sup>**.
- Or adding **Velocity code** in the custom code section of an Action.

### Example

(Standards Process Flow)

**The possibilities for content approval & publishing workflow is unlimited and your content team can get as creative as they want.**

dotCMS will support it. Here is an example of a recently implemented business process flow for a global brand.





# What's Next for dotCMS

What was and is new in previous & upcoming dotCMS releases:

- [What's New in dotCMS 5.0](#)
- [What's New in dotCMS 5.1](#)
- [What's New in dotCMS 5.2](#)

## Complimentary Evaluation Support

dotCMS offers a variety of tactics to test-drive and proof out your key use-cases around your personalization strategy. It is our investment and helps you to evaluate dotCMS effectively, way beyond shiny product demos and slick sales presentation.

More on our evaluation support [here>>>](#)

## References

- 1 <https://dotcms.com/docs/latest/workfl>
- 2 <https://dotcms.com/docs/latest/publishing>
- 3 <https://dotcms.com/docs/latest/bundles>
- 4 <https://dotcms.com/docs/latest/osgi-dynamic-plugins>





## About dotCMS

**dotCMS is a leading, open source content and customer experience management platform** for companies that want innovation and performance driving their websites and other content-driven applications. Extensible and massively scalable, both small and large organizations can rapidly deliver personalized and engaging content across browsers, mobile devices, channels, second screens and endpoints -- all from a single system.

Founded in 2003, dotCMS is a privately owned US company with offices in Miami, Florida; Boston, Massachusetts and San Jose, Costa Rica. With a global network of certified development partners and an active open source community, dotCMS has generated more than a half-million downloads and thousands of implementations and integration projects worldwide. **Notable dotCMS customers include:** Telus, Standard & Poors, Hospital Corporation of America, Royal Bank of Canada, DirecTV, Thomson Reuters, China Mobile, Aon, and DriveTest Ontario.

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