Content review workflow

Overview

Flex Workflow allows you to send Content to be reviewed by other users.

Flex Workflow is a functionality which manages the process of reviewing Content and collaborating. You can use it to send Content items to other users for review. They will be notified of your request and will be able to look through your work and either publish or modify it and send for further review.

> Flex Workflow is a functionality of eZ Studio, but it is accessible from the Content mode.

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Flex Workflow basics

Flex Workflow operates on drafts of Content items.

After creating a new Content item or making changes to it, you do not publish it, but instead send a draft to be reviewed by a different user. This user will then be notified of your request for review and will be able to view your draft. Then they can introduce their own modifications, creating a new draft, or leave your draft as it is. Finally, they can publish the latest draft (yours or their own) or send it on to another reviewer.

Sending Content for review

To send a Content item for review:

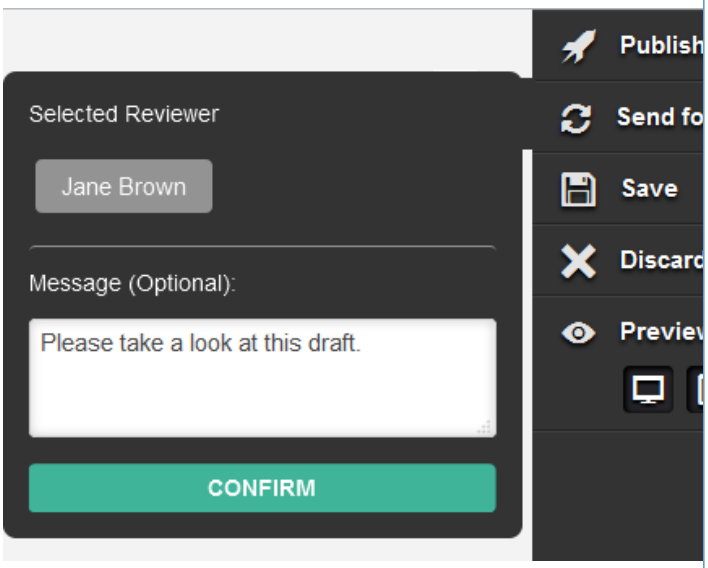
1. Go to the Content mode and either:

- navigate to the Content item you want to modify and introduce your changes **or**
- create a new Content item.

2. Click **Send for Review** in the Action bar.

3. Choose the reviewer for your draft. Type part of their name and you will see a menu with users whose names match this part. Select one of the reviewers.

4. Optionally, type in a message that will be sent alongside your request for review.



5. Click **Confirm**.

You automatically leave Edit mode and a new draft of the Content item is created. This is equivalent to clicking **Save** in the Action bar.

See a video on how to send Content for review

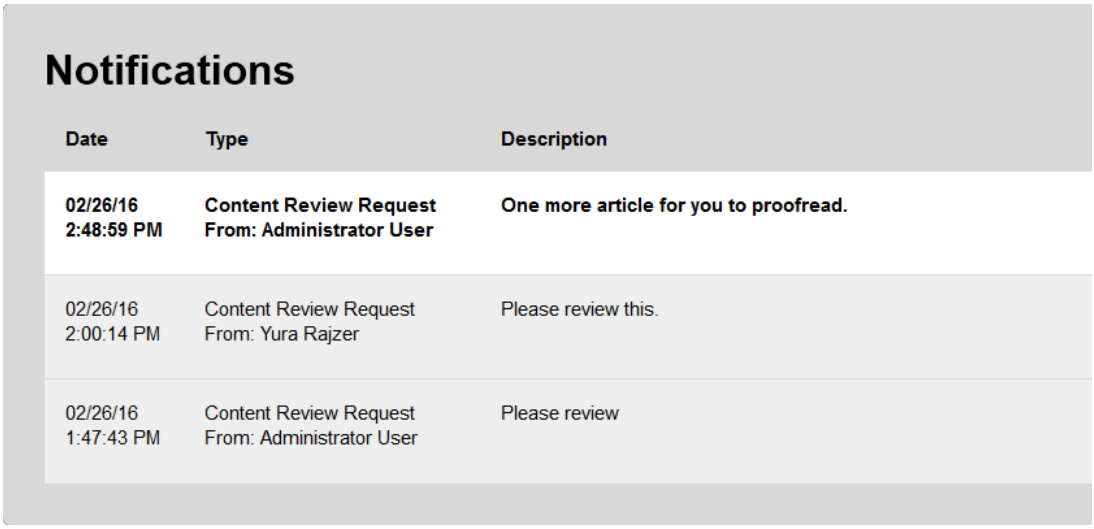
Reviewing Content

Notification about requests for review

When you are selected as a reviewer for a Content item, you receive a notification about it by email. The message contains a direct link to the draft.

As a reviewer you also receive notifications in your user profile. When you are logged in, a number appears next to your profile picture (in the top right corner of the screen) which shows how many requests for review you have received.

Click your profile and choose View notifications. You can see a Notifications window with a list of all requests.

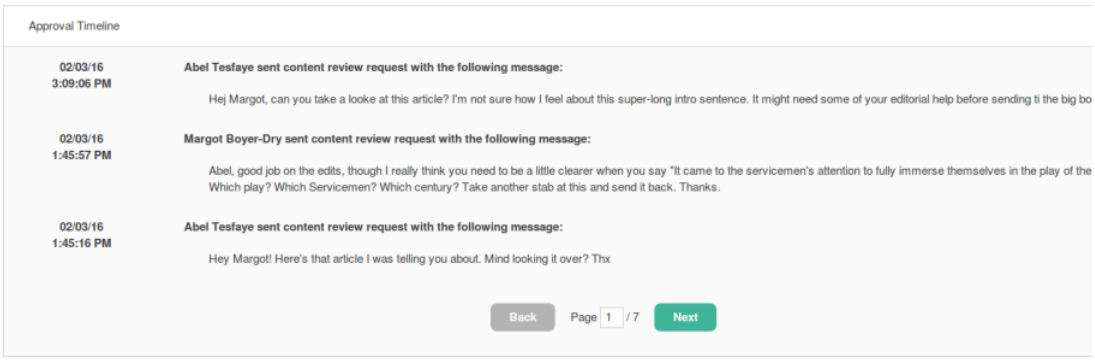


Notifications window

Additionally, a message bar appears at the bottom of the screen as soon as a request is sent to you. It contains a link to the Content item to review.

Approval Timeline

When you enter the Edit mode of a Content item which has been sent to review, you will see the Approval Timeline at the top of the screen:



Approval Timeline

This timeline lists all review requests that have been sent out for this Content item.

Introducing changes

You can modify or publish the draft in the same way you edit a standard Content item. If you want to send it on to another reviewer, the procedure is the same as when sending the initial draft.

It is possible to modify the template of the email which is sent with the notification.

How to modify the template of the notification email

The template must be defined in the Twig templating language in a file named `send_to_review.html.twig` and placed in the `vendor/ezsystems/flex-workflow/bundle/Resources/views/email` folder in your installation.

Read more about overriding templates in Symfony and about Twig.