



## February 2018 Release Notes

Build 16507 on CMS released Wednesday 02.07.18

### + Updates in this Release +

Workflows along with other Admin features are available in V3 this month.

#### Workflow and Workflow Filters

##### Workflow

Workflows are one of the most important CMS features and we are excited to release the newly redesigned and streamlined version of this feature in the V3 interface. Workflows direct your asset moving through the process from Draft to Live on your website. Several stock workflows are provided with your instance and many organizations create custom workflows based upon asset type. For example, a Blog section which is updated more frequently than a company history page may use a workflow with less steps before publishing to Live. This would require a customized workflow, which can now be created using V3.

The Workflow feature in V3 allows you to update *all* aspects of a workflow step using just one panel. Once you have a step open, you can add/delete transitions, set the DQM findings and add email notifications. No longer do you have to select different spaces on the workflow to find the options. They are all in one place, attached to the step.

To use the Workflow panel:

1. Go to **[Settings] [Workflow]** to view all available workflows in the instance (*Figure 1*)
  - a. When hovering over a workflow, at the far right, you will see a **[Clone]** and **[Delete]** option
2. From this panel you can create a **[New Workflow]** or single click one of the existing workflows to open for edit.
  - a. Existing workflows will default to the Overview panel. Note the arrows at the top left which can be used to expand the workflow across your screen (*Figure 2*).
3. In the panel click **[Edit Steps]** to edit any of the workflow steps. When you select any of the steps in the column, the edit page will show the options attached to that step. For example, you will see the Draft transitions when that option is selected, or Live options when that is selected. (*Figure 3*)
4. Select **[Reorder Steps]** to drag the steps up or down in the list.
5. Click **[Save]** to keep any updates made to your workflow.

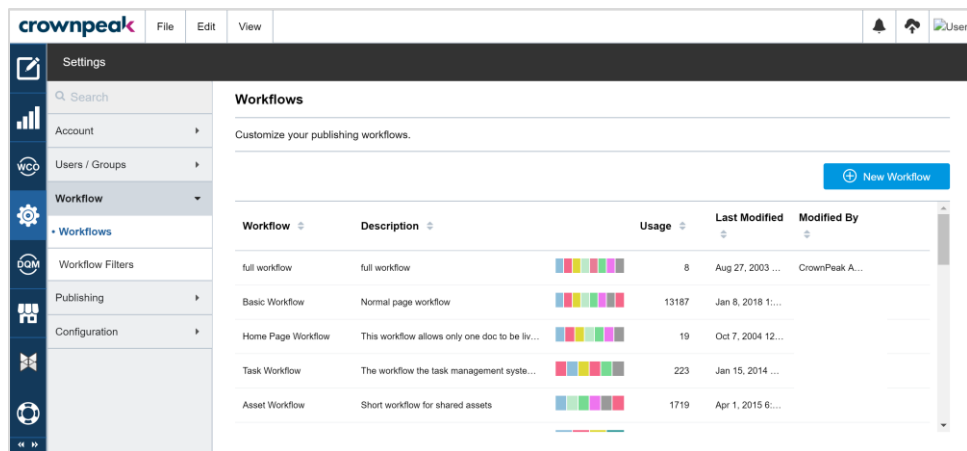


Figure 1 – Workflow



Figure 2 – Expanded Workflow

Figure 3 – Workflow Edit

## Workflow Filters

Workflow Filters, previously only available in Classic, are available in V3 in the Settings section. Workflow Filters allow you to specify field comparisons that, if true, would show and execute the command within the workflow filter configuration.

To use Workflow Filters:

1. Go to **[Settings] [Workflow Filters]** to view all available Workflow Filters in the instance
  - a. As with Workflows, when hovering over a filter, at the far right, you will see a **[Clone]** and **[Delete]** option
2. From this panel you can create a **[New Workflow Filter]** or single click one of the existing filters to open for edit
3. In the panel add or delete any required query options (*Figure 4*)
4. Save the filter

Cancel
Save

### Edit Workflow Filter

**Name \***

**Description \***

**Workflow Filter Query**

When an asset satisfies these conditions, a user is then allowed to execute the workflow transition that this filter is applied to.

Field *	Comparison *	Value *
<input type="text" value="[Group Editors Clicks]"/>	<input type="text" value="less than"/>	<input type="text" value="1"/>
<div> AND OR </div>		
<input type="text" value="[Group Standardized QA Editors Clic"/>	<input type="text" value="less than"/>	<input type="text" value="1"/>

Figure 4 – Workflow Filter Edit

## Other Admin Features

Several features have been moved from Classic to V3, thus relieving the need to login to the Classic version of the application. Additionally, we have added support for FTP over SSL (FTPS). The following features can be accessed from **[Settings][Publishing]** (Figure 5).

### Ported from Classic:

- Import SFTP
- Import SMTP
- Export SFTP
- Export HTTP

### New in V3:

- Use FTPS via Export SFTP

This option allows for using the Export SFTP option for using FTP over SSL (FTPS). This allows for using Microsoft Azure for publishing.

To use this option, do the following:

1. To use FTPS, use the Edit SFTP option (*Figure 6*)
2. Make sure SFTP is unchecked
3. Enter the hostname as `ftps://myhostname.mydomain.com`

**Note:** *Importing and Exporting with ODBC has been retired.*

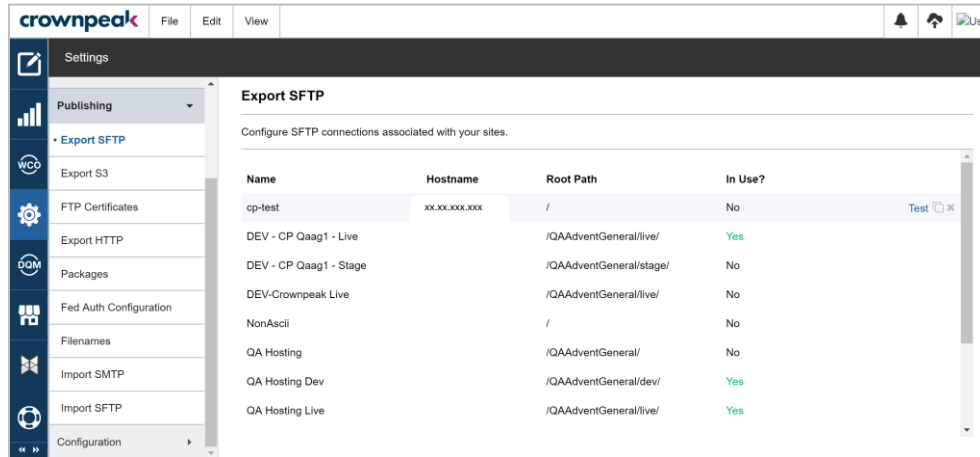


Figure 5 – Export SFTP

**Edit FTP Server**

Name \*  
FTP Server 1

Hostname \*  
XX.XX.XXX.XXX

Username \* Password \*  
ftps .....

Root Path  
ftps://myhostname.mydomain.com

☐ Use SFTP ☐ Active Mode ☐ Safe Write

☐ Display trace information in the test results.

Test Connection

Figure 6 – FTPS Setting

## + Other Improvements +

1. Alignment updates have been made within the User/Groups UI (OCD-4618)
2. Folder refresh will trigger the publishing process (OCD-4518)
3. Improvements have been made to speed up Component Library saved (OCD-4980)
4. New Groups will be viewable when using the Edge browser (OCD-3122)
5. Search connectors will not publish unless selected in a publishing package (OCD-3360)
6. The Activity Monitor and Long Running tasks will work properly in Microsoft browsers (OCD-3776)
7. The Hubspot connector has been updated to their latest Oath (OCD-4978)
8. The save button in the slider panels will remain when scrolling (OCD-5074)
9. User avatars can be uploaded and saved (OCD-4984)

