

Understanding Publishing Workflows

Publishing Workflows can be a way for Admins to manage content publishing together with Power Users but without granting them complete edit and delete access to Category content. Power Users get access only to the pre-defined list of Element attributes.

The functionality can be used to ensure that new content has undergone validation, is up-to-date and accurate, and, therefore, is ready for wider business visibility.

Use Case

- Admins are creating reports in Metric Insights;
- Power Users are certifying and publishing these reports after making sure that the data they include is correct.

Configuring Publishing Workflows

The above scenario will require to [create a Publishing Workflow](#) with two Stages. This can be done via the dedicated Publishing Workflow Editor available at **Content > Publishing Workflows**.

Publishing Workflows

Name	Created By	Last Edited	Used	View
1-Party Review & Certification	system	2021-08-02 06:02:46	0	View
2-Party Review & Certification	Anna	2021-08-05 16:33:03	4	View
3-Party Review & Certification	system	2021-08-02 06:02:46	0	View
Certification Workflow	Yevgeniya	2023-07-13 12:33:53	0	View
Financial Reporting	Jessie Reed	2021-08-05 07:27:35	2	View
New Workflow	Anna	2021-12-03 10:48:55	4	View
State Reporting	Yevgeniya	2022-02-09 11:48:55	10	View
Statist 99 Certification Review	kate@metricinsights.com		78	View

[+ New Publishing Workflow](#)

Publishing Workflows / Certification Workflow

Info Elements [+ New](#) [Content](#) [Admin](#) [Yevgeniya](#)

☒ Enabled

Name: Certification Workflow

Name	Type	Description
Pending Review (default)	New	Elements that need to be processed a
Published & Certified	Complete	Reports are published, certified, and L

[+ New Publishing Workflow Stage](#)

Staging Categories

Name	Workflow is default for Category	Auto Assign to Stage
Demo Sales Category, Staging	Y	

[+ Add Staging Category](#)

Publishing Categories

Name
Demo Sales Category

[+ Add Publishing Category](#)

Cannot Be Edited Outside of Workflow

☒ Visible on Homepage
☒ Visible in Search
☒ Certification

Automation

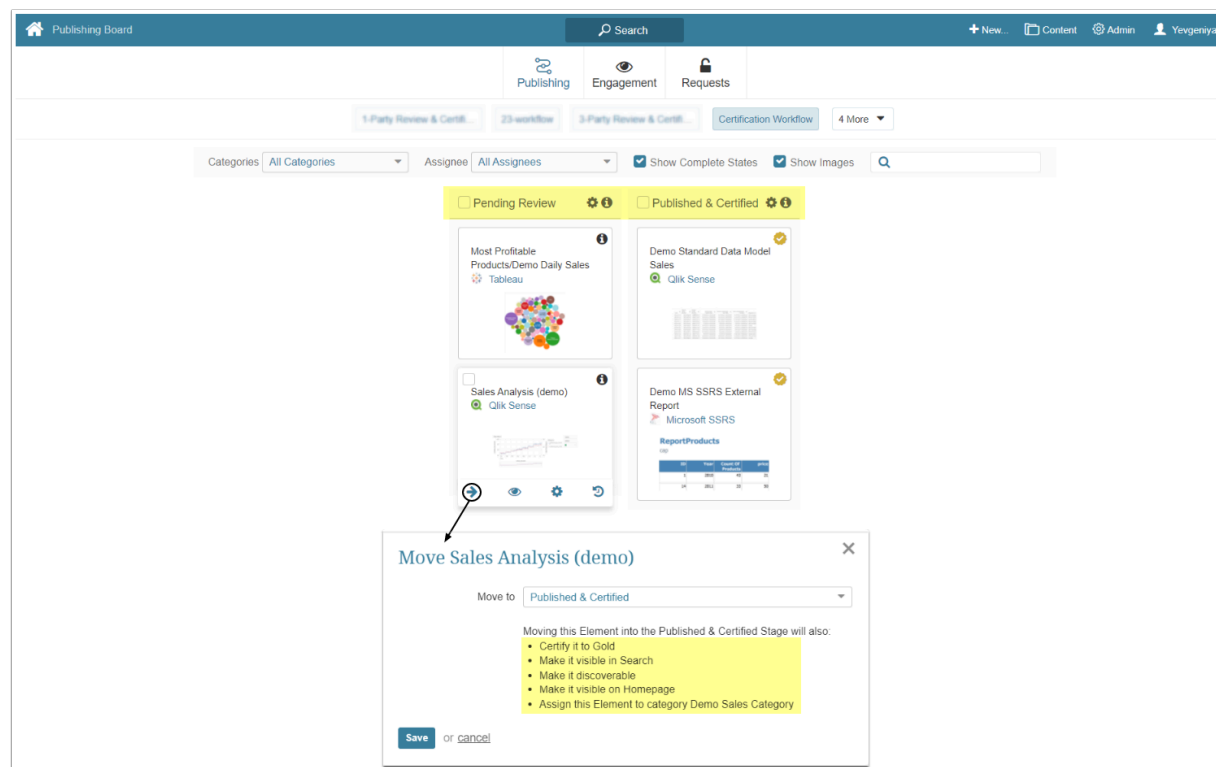
☒ Auto select the next Workflow Stage when opening the Move/Assign popup dialog
☒ Decertify Elements that are updated after Certification
 Upon decertification, move to this stage: Developer Review

There are no Automation Rules

[+ Add Rule](#)

Executing Publishing Workflows

Power Users who are responsible for content review and certification will then access the Workflow via **Content > Content Center > Publishing Tab** and review content by [going through the Stages](#) assigned to them.



- **Pending Review** – where an External Report lands after it's been created in Metric Insights;
- **Published & Certified** – once the Report lands in this Stage it can automatically become certified and available to authorized content consumers (depending on the Stage configuration).

Automating Publishing Workflows

More complex Publishing Workflows can be automated by using [Automation Rules](#) that require content to be revisited and recertified.

Edit Automation Rule

Rule NameAutomation Rule

Type

☒ Scheduled

☐ On Stage Change

ScheduleOn Mon at 8:00

Condition

Element Certified

more than

30

days

Actions

☒ Assign Workflow Stage

Pending Review

☒ Assignee

Andy Lee (click link to reassign)

☒ Certification set to

Not Certified

☒ Search Visibility

Not Visible

☒ Homepage Visibility

Not Visible

☐ Custom Script

☐ Custom Fields

Limit by

☐ Data Source

☒ Category

Categories

Name

Demo Sales Category

+ Add

Save

 or

cancel

This way, Publishing Workflows and Automation Rules help establish a comprehensive content governance strategy, ensuring that content consumers access the most relevant and accurate data.

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