METRIC INSIGHTS

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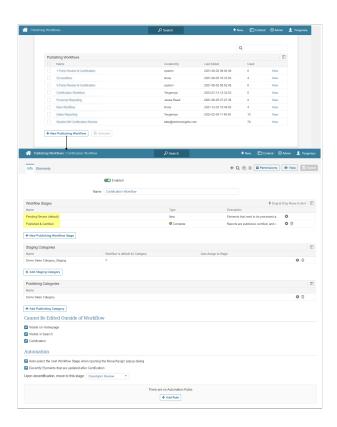
The functionality can be used to ensure that new content has undergone validation, is up-to-date and accurate, and, therefore, is ready for wider business visibility.

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.
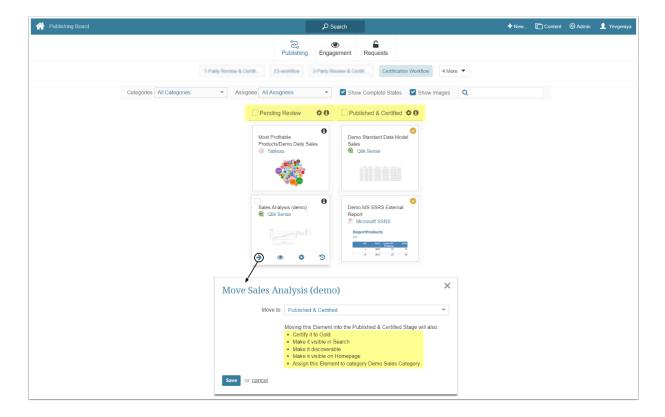
Configuring Publishing Workflows

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**.
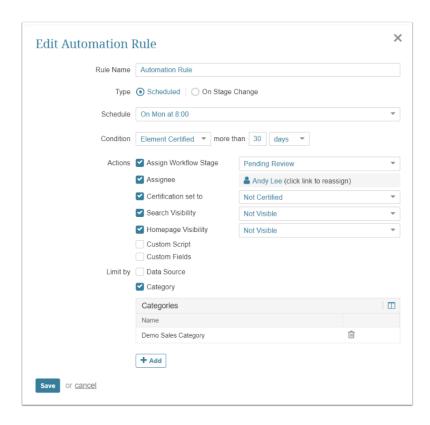
Executing Publishing Workflows

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 Name | Automation Rule

Type | ◉ Scheduled | ○ On Stage Change

Schedule | On 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.