**Created to help the team learn and ensure they were following all the necessary steps of the content workflow.

Workflow Check List - Cheat Sheet

Once assigned a Task, read through the parent Task and **Scoping Doc** to gather information on needs for content and if you need to create or edit content.

Audit

- Press Butterfly Button in Task: Use **Scope > Begin audit (V)**.
- If auditing a Help Center Articles.
- If auditing a CR.

In search field

Include always:

1. Path: **Active Help Center (fka Content Migration)** or **Canned Response (CRs).**
2. Locale: **en_US.**
3. Object Status: **Published** unless notified differently.

Options to narrow down search:

1. Title: alter with variations: has these words, has this phase.
2. Text: alter with variations: has these words.
3. Tags: alter with variations: [redacted]-content-android.

Create excel sheet:

1. Highlight all the CMS objects in CMS search.
2. Click **More** at the bottom tab.
3. Click **Export as excel**.

Drafting

1. Make a copy of the Content Template Writers Draft.
2. Press Butterfly Button: **Scope > Begin draft (V)**.
3. Update or create content.
4. When Complete:
    a. Link draft doc in Task.
    b. Check boxes.
    c. Press Butterfly Button - **Draft Complete**.
    d. Leave any pertinent comments.
5. When CS comes back with revision - Update.
6. Press Butterfly Button - **Draft Complete** again.
7. Leave any pertinent comments.

CMS:

- If creating a Help Center Article.
- If creating a CR.
    1. Click **New**.
    2. Click **Create Object** and fill out the form.
        a. Object Name - **Title of article**.
        b. Owning Team - [redacted] **Che FTE**.
        c. Template - Choose from either HC or CRs:
            i. [redacted] **HC Article - Informational**.
            ii. [redacted] **HC Article - Educational**.
            iii. [redacted] **HC Article - Troubleshoot**.
            iv. [redacted] **CRs - Informational**.
            v. [redacted] **CRs - Educational**.
            vi. [redacted] **CRs - Troubleshooting**.
        d. Add Tags:
            i. For Help Center Articles, **always include**:
                - [redacted]-content.
                - [redacted]-content-article.
            ii. Then **select** one of the following:
                - [redacted]-content-informational.
                - [redacted]-content-educational.
                - [redacted]-content-troubleshooting.
            iii. For CRs, **always include**:
                - [redacted]-content.
                - [redacted]-content-cr.
            iv. Then **select** one of the following:
                - [redacted]-content-informational.
                - [redacted]-content-educational.
                - [redacted]-content-troubleshooting.
            v. Confirm in Task for the other Tags to be included.
        e. Cosmos Tags - confirm with CS if needed.
        f. Uncheck subscribe button.
        g. Click **Create**.
        h. Add created content in XML code.
        i. Add comment with **Task number** and **description** > **Save**.
        j. Click Butterfly Button **Draft Complete** to notify CS when complete.
        k. Leave pertinent comments and ask if content is ready to be submitted for translations.

Updating content

- Uploading edited content:
    1. Make sure the object is **not** in a draft status.
        - If in draft need to inform CS and not updates can be made until resolved.
    2. Add comment with **Task number** and **update description** > **Save**.
    3. Make updates in XML > **Save**.
    4. Click Butterfly Button **Draft Complete** to notify CS when complete.
    5. Leave pertinent comments and ask if content is ready to be submitted for translations

Translations

1. Click **Translation** > **Request Translations** in Object.
2. Fill out the fields in page 1 of pop-up form:
    a. CMS ID - Confirm populated with current object.
    b. Don't tick: don't include reference objects.
    c. When to publish: Save locale translations as drafts.
    d. Locale set:
        i. [redacted]**-faq-general** - for 31 translations.
        ii. [redacted]**-cr-general** - 16 translations.
        iii. **Custom** - manually fill in locates if less than 31 for HCAs and 16 for CRs.
    e. Category: [redacted]**-support-cr** or **wa-support help center**.
    f. PFH Node:
        i. [redacted]**.**
        ii. **Consumer XFN** - unless otherwise specified in scoping doc.
3. Click **Next** to advance to page 2.
4. Fill out the fields in page 2.
    a. Title (Platform & Title of Article).
    b. Description (Task ID # & Summary of project).
    c. Gatekeeper - leave blank.
    d. Translation from: Confirm says: English / End User.
5. Click **Next** to advance to page 3.
6. Confirm date on page 3.
7. Click **Create Task**.
8. In the Task, add the Translation Task number:
    a. Check **Submit for L10N** box and link **Task Number**.
    b. Add **Task Number** to Blocked by Field.
    c. Click Butterfly Button **Submit for L10N**.
9. Leave comments that translations have been submitted.

Publishing

Once you are ready to publish after translations have been completed, and you have received Approval from CS to publish. Go to CMS object.

1. Click **Publish** at top > **Publish**.
    a. If you get pop to include PFH node; Add [redacted]**/Consumer XFN (or applicable Section)** to PFH node section under magnifier and **Save**.
2. Click **Translations** > **Manage Translations**.
3. Click **Publish all Locales** in the new screen > **Confirm**.
4. Click the **Check mark** next to the task number to close the Task for **Translations**.
5. Leave note for CS in Task that objects have been published and Task will be closed.

Note: When creating new objects for CRs, once published, fill out the Macro form.

- Macro Request Form - Instructions here.

Deprecating

- **CRs**
    1. Fill out the Macro form - Instructions for form.
- **HCAs**
    1. Audit where the object is referenced. Verify in the object Overview under Referenced.
    2. Remove HCA from those referenced objects.