Workspaces and Versioning in TYPO3
A Primer

Documentation authored by Samuel Paul, copyright Digipen USA Corp 2007

Concept
Many different kinds of content require some sort of workflow process. Drafting new policies, updating reference materials, publishing news items, and creating new web content are all examples of such processes. As a Content Management System, TYPO3 can handle these (within limits), as long as you are willing to work within its interface and use its format for storing your content. TYPO3 cannot do proper versioning on uploaded files like Word documents, spreadsheets, or pdf's. It can do proper versioning on anything you can build out of TYPO3 Pages and TYPO3 Content Elements (trust us, that's a lot!). Anyone looking here for high-powered version control of binary documents (Microsoft Office, Adobe Acrobat, etc.) is advised to use TortoiseSVN (available on all Digipen computers).

All that being said, what exactly is a “workflow process”? See for yourself.

In this process, content editors modify or create new content. A draft of their work is submitted to a reviewer for approval, who in turn may submit it to a publisher. The publisher has the power to actual “publish” the content, adding to or replacing material in the “live version” (visible to users) of the site or database. At any stage in the workflow, the content version may be rejected and sent back to the previous stage for more work.
How-To

This tutorial assumes you have been set up with a back-end account on one of our TYPO3 servers, and that the server itself is properly configured for workspaces, groups, etc.

Most of this tutorial will be written (and its screenshots taken) from the perspective of generic_editor, a user belonging to the “Content Editors” group (your group might be called something different) with access rights that should be roughly equivalent to your own. (Note: Users expected to oversee actual publishing will have significantly higher access rights and more complicated UI options). generic_editor can create, edit, and delete pages and content within the special “Editor Workspace”, as we will see.

Log in to your TYPO3 account. You should see something like this:

I’ve put a red box around the most important part, the list of modules you have access to. Your personal account may have more, but be sure you have at least these four: Page, View, List, and Versioning. Each is a vital tool for creating, editing, previewing,
and approving content. We will focus on **Versioning**, but you should take some time to get to know the other modules, too.

In the bottom-corner of your browser window you should see something like this:

![Editor Workspace](image)

Again, the particular name of the workspace may differ on your server or setup, but it should definitely *not* be “Live Workspace” or “Draft Workspace” -- These are the default workspaces that come with TYPO3, and they are not sufficiently configured to do what we need. You will notice if you click on the drop-down menu that this option may be the *only* option. Good! Content editors should not be able to directly modify live content at a whim; that's the whole point of the review process.

Let's give it a whirl and make some new content for review. First, bring up the **Page** module by clicking on **Page** in that left menu. This should put you here:

![Page Module](image)

I've boxed the *Page tree* in green. The page tree lets you navigate the structure of a website or data collection in the same way you navigate through folders and files on your computer. Now click on one of the pages, preferably the very topmost one in the tree. In our example here, that's the “ProjectFUN v2” page, which is the **root** of this site. That means that changes we make to this page could affect the whole site. Don't worry, though, we're safe as long as we're in the isolated “Editor Workspace”. Nothing we do
can hurt the content people are accessing.

Here we are in the guts of the **Page** module:

There are a lot of little buttons to choose from, but right now we only want to make a new page. **TYPO3** likes to give us lots of flexibility and lots of different ways to do things. I've marked in green the 3 buttons we could use to create a new page from this point. *(Note: A “page” in **TYPO3** is really just a container for content, and may or may not end up as a visible page on the web site.)* Click on the topmost of the three buttons, the little page icon with the “+”. You'll get a bunch of choices like the ones on the right here. Click on the tiny page-with-arrow icon at the way bottom there—this will make your new page at the “bottom” of all the existing ones under this part of the tree. For our purposes now it doesn't really matter, but we'll be able to find this page quickly later. Be patient, we're almost to the good stuff!
The “new page” interface:

At this point I'm going to gloss over some details to get to the meat of the tutorial. You can experiment and learn all about the options for making pages, different page types, and the specifics of content, but we're concerned here with the workflow process. To continue, just give the page a title (no. 1 above, marked in red) and click the “Save and close” button (no. 2., marked in red). You'll go back to the Page module, but now you're looking at the page you just made. It's highlighted in the page tree:

I chose the title “Super New Page”, but choose anything you like.
Congratulations! You have successfully completed the first step in the workflow process. Give yourself a pat on the back. By the way, if you try to view the page you just made, you might get an error message complaining about it not having “a proper connection to the tree-root”. Don’t worry, it’s supposed to say that. If you were looking real close while we made the page, you might have noticed its type was “Shortcut”. If you change it's type to “Standard” you'll be able to view it, but it’s not needed to complete the tutorial.

Now that we’ve created some new content (or close enough), we want to get the workflow process going – i.e. approval and publishing. All new (or changed) content needs to be approved by a reviewer and a “publisher” before it can be “published” and become available to front-end users. To start, switch to the Versioning module by clicking on Versioning in the leftmost menu.

There are a lot of little buttons, but if we take a closer look we'll see it's not too bad.
In fact, all we really care about is the part I highlighted in green. It consists of two buttons and a status message:

As an editor, rejecting your own content version won’t accomplish much. Let’s take the plunge and **Send to review** by clicking on that little up-arrow. You’ll get a little prompt box asking you to write comment for the next person in the approval chain.

You should *always* leave some sort of comment, for the sake of documentation. Click OK to confirm and give yourself another pat on the back. You’ve completed the second step!

Notice that most of your controls have vanished. The version is in review now, and out of your hands as a content editor. You can mouse-over the status message to see a running history of this content-version (shown above).
Any time we want to see how our draft is doing in the workflow/approval process, we can return to the **Versioning** module and check on its status. Remember, in order to see a particular content element or page in the Versioning module we *must have its containing page* (or the page itself) selected in the page tree.

We can continue following the workflow process by switching to the perspective of an entirely different user, the reviewer. **Only review users can follow along with this part of the tutorial.** If you're not a reviewer, don't sweat it; it's good to know what's going on anyways. After the content editor submits a page for review, this is what the review user will see in their own Versioning module:

![Versioning Module](image)

The reviewer's approve and reject buttons are almost the same as the content editor's in function, except their *reject* will return the draft to the editors and their *approve* will forward the draft to the publishing user.

For anyone along the chain of approval, a rejected version looks like this:

![Rejected Version](image)

To return to the original "Editing" state, some user has to click the *approve* button again.

Once the content has been approved by a reviewer, the version will look like this:

![Approved Version](image)

The little number next to the status indicates how many steps of approval and rejection this particular draft has undergone.
Hopefully your draft content will be actually published at some point. When that happens, it simply disappears from the Versioning module and becomes part of the Live Workspace. It will still be visible in your editing workspace, but not distinguished from any other content:

See? It's gone from Versioning, but still in the page tree.

Congratulations, that's all you need to know (in general) to get started using workspaces and versioning in TYPO3! If you have any problems, contact the Web Dev team through IT and we'll be glad to help.

Good luck and happy editing.