

# How to Create a Workflow

This page takes you through the steps for creating a workflow. Each main step is broken down into sub-steps which are followed by one or more brief videos showing you the procedures for completing them. In this example, when a file is created or updated on a department path, an email is sent to a user to alert them that a new file is ready for review.

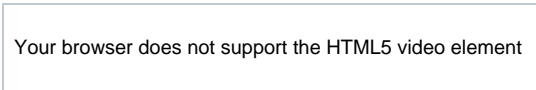
## 1. Initiate workflow creation.

- a. In the navigation panel, click **Workflows**.  
The **Workflows** page opens.
- b. Click **Create New Workflow**.  
The drag-and-drop workspace opens.



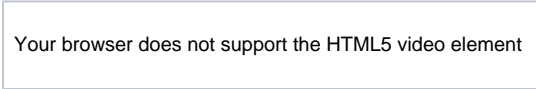
## 2. Choose a workflow trigger.

- a. In the drag-and-drop workspace, click **Click Here to Start**.  
A list of triggers, events that initiate a workflow, appear.  
For information about the different types of triggers, see [Workflow Triggers](#).
- b. Click a trigger, and click **Next**.
- c. In the following example, we choose the trigger **Automatically on a File Activity**.
- d. Since that trigger requires us to choose a file path and a file event, we select a path and choose the event **If a file is created or updated**, and then click **Add**.  
An initial workflow appears on the drag-and-drop workspace.

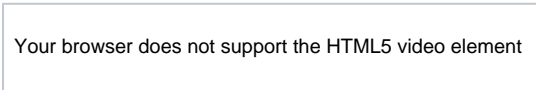


## 3. Add steps to the workflow.

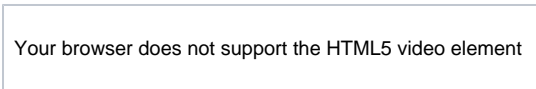
- a. Add a step.  
For more information about the types of steps you can add to workflows and step parameters, see [Workflow Steps](#).  
In the following example, we add the **Send Email** step.



- b. Fill in the parameters for the step.  
We fill in values for the **To** recipient, the **Subject** of the email, and the email **Body**.



- c. We include a variable in the **Body** of the email to make it more informative.  
We add the full name of the new file including its path with the variable **File full path**.  
For more information about using variables, see [Using Variables in Workflows](#).



- d. Click **Save** to save the workflow details.
- e. Repeat steps **a** through **d** to add any number of steps to the workflow.

## 4. Save the workflow.

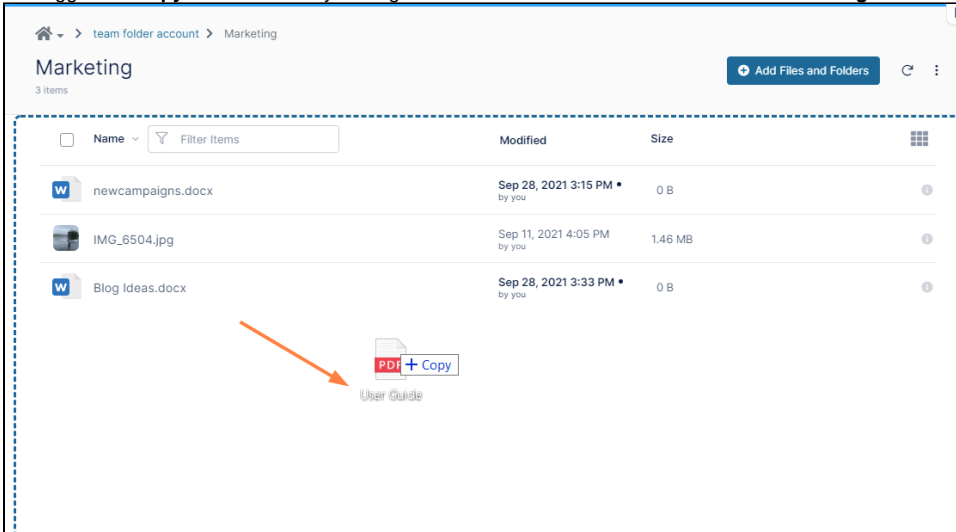
- a. In the upper-left corner of the drag-and-drop workspace, name the workflow.
- b. Click **Create Workflow**.  
When you return to the **Workflow** page, you should see the workflow listed.

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## 5. Test the workflow.

### a. Trigger the workflow.

We trigger the **Copy File** workflow by adding the file **User Guide** to the **Team Folders/Marketing** folder.



### b. Next we confirm that the workflow was triggered by checking if an email was sent to the recipient we added.

### c. We also check that our variable functions as expected by making sure the email includes name and path of the new file.

