

Configure Flow Review Practices

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Configure flow review practices so your team can validate captured flows consistently before they are published or used as product documentation. A clear review process helps reviewers confirm that each flow is complete, accurate, and ready for stakeholders.

Overview

Flow review is the validation stage for captured product flows. You use it when a flow needs review before it moves into a publish-ready state, such as **Version 4 — Pre-Publish Review**. Reviewers can inspect the flow, return to the review workspace when changes are needed, and use preview options to check how the flow will be presented.

The review area includes a summary stage, shown as **1 Review Summary**, and a configured stage, shown as **2. Configured**. These stages help your team understand whether a flow is still being assessed or has been prepared for the next review and publishing activities.

Use review practices for all flow types that your organization documents, including **User Flow**, **Pipeline Flows**, **Loop Flows**, and **Agent Loop Flow Diagrams**. You can also apply the same practices when reviewing flows for product surfaces, security, and authentication scenarios.



Screenshot pending: The flow review workspace showing the “1 Review Summary” stage and review actions.

Prerequisites

Before you begin, make sure that you have:

- Access to the relevant project and version.

- A captured flow that is ready for review.
- Permission to access the review workspace.
- A defined reviewer or review team for the flow.
- Agreement on the information that must be validated before publishing, such as user steps, product surfaces, authentication requirements, or security expectations.
- A version selected for review, such as **Version 4 — Pre-Publish Review**.

Step-by-Step Instructions

1. Open the project that contains the captured flow you want to validate.
2. Select the version that contains the flow review work.
3. Open the review workspace for the selected version.
4. Review the **1 Review Summary** stage to understand the current review status and the information included in the flow.
5. Identify the type of flow you are reviewing, such as **User Flow**, **Pipeline Flows**, **Loop Flows**, or **Agent Loop Flow Diagrams**.
6. Compare the captured steps with the expected user journey or business process.
7. Confirm that the flow includes the relevant product areas, including **Product Surfaces — what you actually have** when applicable.
8. Review authentication-related steps against the  **Authentication & Authorization Flow** requirements when the flow includes sign-in, access control, or permissions.
9. Review security-related steps against the  **Security Best Practices Implemented** information when the flow handles protected data, privileged actions, or access-sensitive tasks.
10. Select **Preview** to inspect the flow in preview mode.
11. Review the flow presentation in **1. Preview Mode** to confirm that the steps are understandable before you move forward.
12. Select **Back to Review** if the preview reveals missing, unclear, or incorrect flow information.
13. Update the review decisions and flow details needed to address the identified issues.

14. Select **Configure** → when the review content is ready to move into the configuration stage.
15. Confirm that the stage changes to **2. Configured** after configuration is complete.
16. Select **Review & Publish** when the configured flow is ready for final review and publishing activities.

 *Screenshot pending: The Preview screen showing the “Preview” action and “1. Preview Mode” state.*

Tips and Best Practices

- Review one flow objective at a time. For example, validate a **User Flow** separately from a **Pipeline Flows** diagram so reviewers can focus on the correct audience and outcome.
- Use **Preview** before moving to **Review & Publish**. Previewing helps you catch wording, sequence, and presentation issues before the flow reaches a broader audience.
- Treat **1 Review Summary** as the team’s working checkpoint. Use this stage to verify that the captured flow represents what users actually do, rather than what the team expects users to do.
- Use **Back to Review** whenever you find an issue in preview. Returning to review is preferable to moving an incomplete flow into the configured stage.
- Configure flows only after the review team agrees that the steps are accurate. The **2. Configured** indicator should represent a flow that has completed its review preparation.
- Review access-related flows carefully. If a flow includes authentication or authorization, confirm that the visible steps align with the organization’s approved authentication and access practices.
- Consider sharing a preview with stakeholders when external feedback is required. The **Share Preview Link** option can help reviewers validate flow content without changing the underlying review work.
- Use **Configure CI/CD** only when your organization’s publishing or review process includes CI/CD-related flow configuration. Keep this separate from the content review of the user journey itself.

Related Pages

- [Capture Product Flows](#)
- [Review and Publish a Flow](#)
- [Use Preview Mode for Flow Validation](#)
- [Share a Flow Preview Link](#)
- [Configure CI/CD for Product Flows](#)
- [Manage Project Versions](#)

Troubleshooting

You cannot find the flow review workspace

Confirm that you opened the correct project and version. Review work is associated with a specific version, such as **Version 4 — Pre-Publish Review**. If the expected version is unavailable, ask your project administrator to confirm your access.

The flow does not look correct in Preview

Select **Back to Review** and correct the flow before proceeding. Check the step order, user actions, product surfaces, and any authentication or security-related content. Select **Preview** again after making the corrections.

The flow is not showing as configured

Complete the required configuration activity by selecting **Configure** → from the review process. Verify that the stage displays **2. Configured** before continuing to **Review & Publish**.