

Recommended Process for Creating Applications

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To create an application as quickly and easily as possible, Resolver recommends that administrators follow the process outlined below:

- 1. Create users, user groups, and roles.
- 2. Create an application.
- 3. **Create an activity:** Enter the activity's name and description.
- 4. **Create object types:** Enter the object type's name(s), description, and configure its monogram and icon.
- Create object type groups: Enter the group's name(s), then edit the group to add related object types.
- 6. **Configure the object types:** Add fields, relationships, formulas, roles, and inferred permissions, and configure the workflow states, triggers, transitions, conditions, and actions.
- 7. **Add object types to roles:** Configure the workflow permissions for each state on each object type added to the role.
- 8. Create forms and data visualizations for the object types.
- 9. Configure the activities' actions, roles, and views.

The steps to complete the above process are discussed in detail the remainder of this guide.