![Resolver. A Kroll Business]

Create a New State

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Overview

States represent the data collection and review stages (e.g. Create, Triage, Review, Investigate, Close, etc.). States allow you to control where an object is created or viewed in an application, required fields that must be completed during certain stages, which state the Object will transition (Triggers) and narrow search results.

A default workflow (**Creation**, **Draft**, **Active**, and **Archived** states) is automatically added to the Object Type when creating an Object Type. These states can be deleted or supplemented with additional States as needed (except for the Creation state, which cannot be deleted and allows only limited configuration).

User Account Requirements

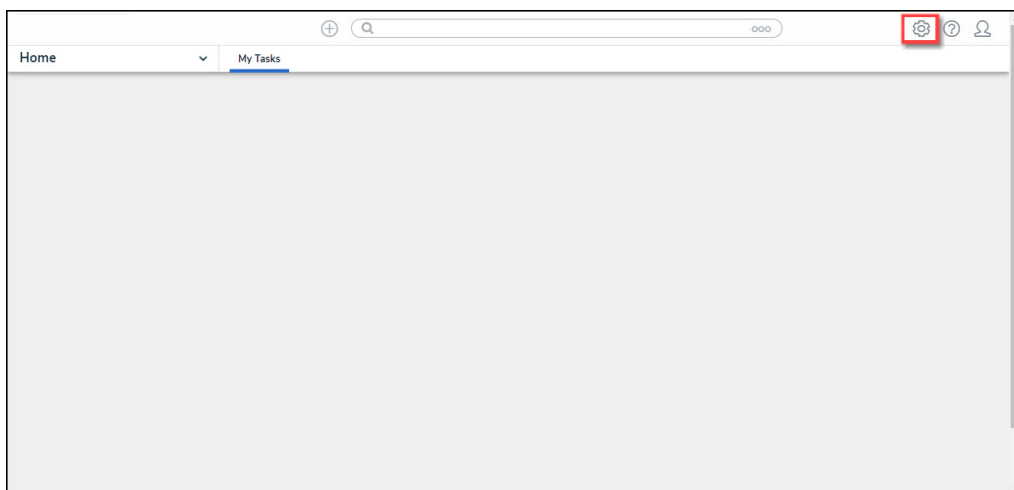The user account you use to log into Resolver must have Administrator permission to access Object Types.

Related Setup/Information

See the Edit or Delete a State article for more information on marking fields, properties, or roles as required and changing the State's name or color.

See the Add a Trigger & Transition to a State article for more information on adding triggers, transitions, or actions to a state.
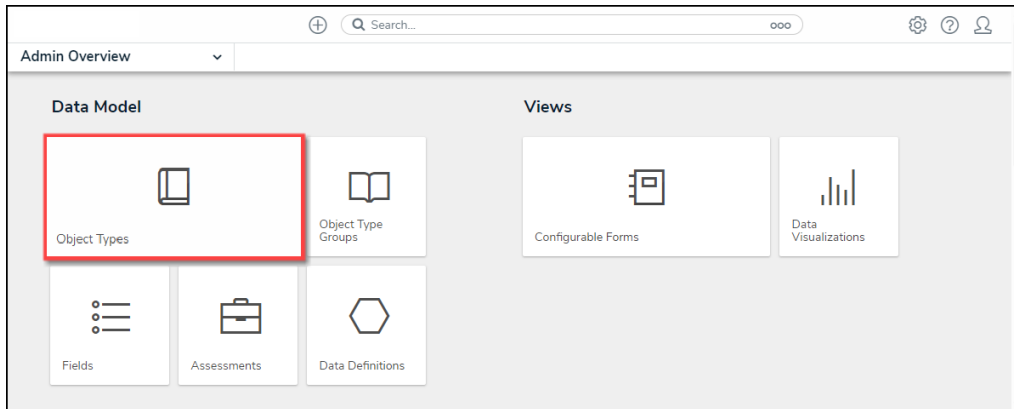
Navigation

1. From the **Home** screen, click on the **Administration** icon.

2. From the ***Admin Overview*** screen, click on the **Configurable Forms** tile under the **Views** section.
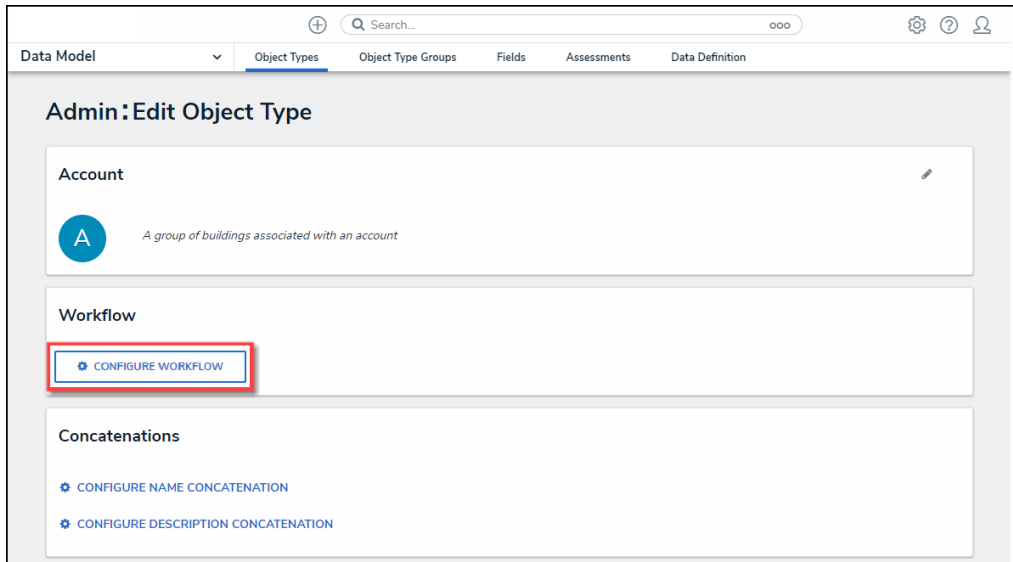

Configurable Forms Tile

Creating a New State

1. From the ***Admin: Object Types*** screen, enter an Object Type Name in the **Search** field to narrow the search results list.

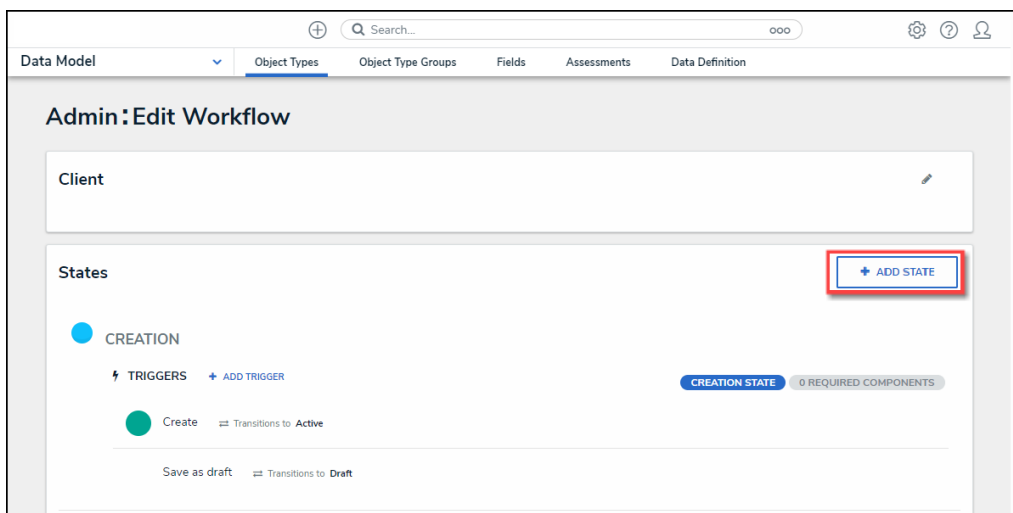2. Click on an **Object Type Name** from the search results lists.
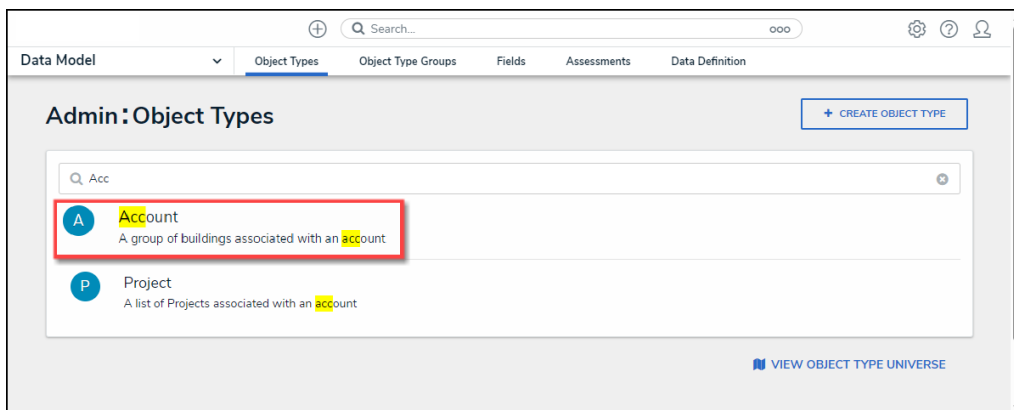
Object Type Name Link

3. From the **Admin: Edit Object Type** screen, click the **Configure Workflow** button.
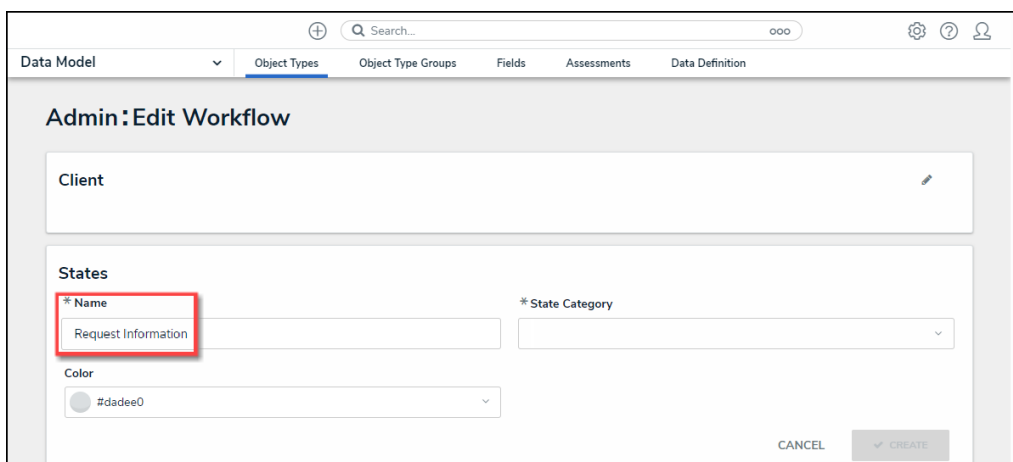
Configure Workflow Button

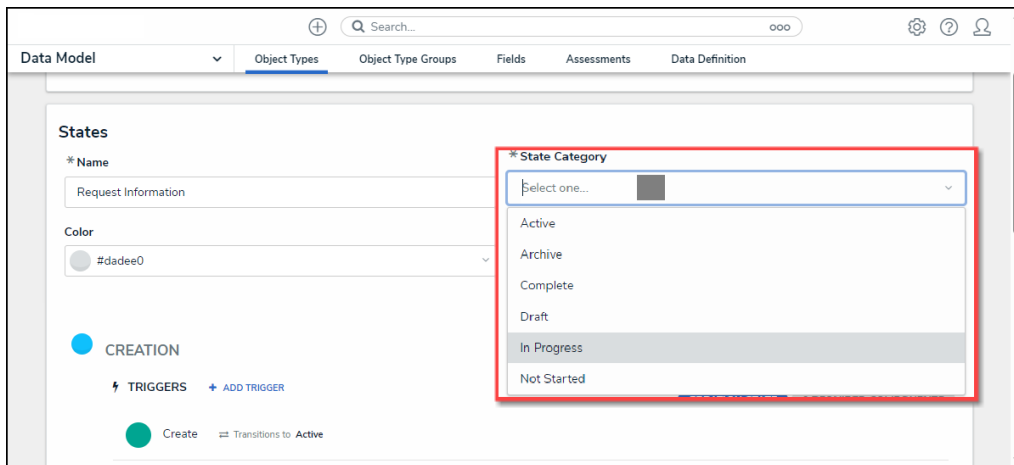4. From the **Admin: Edit Workflow** screen, click the **+ Add State** button.

+ Add State Button

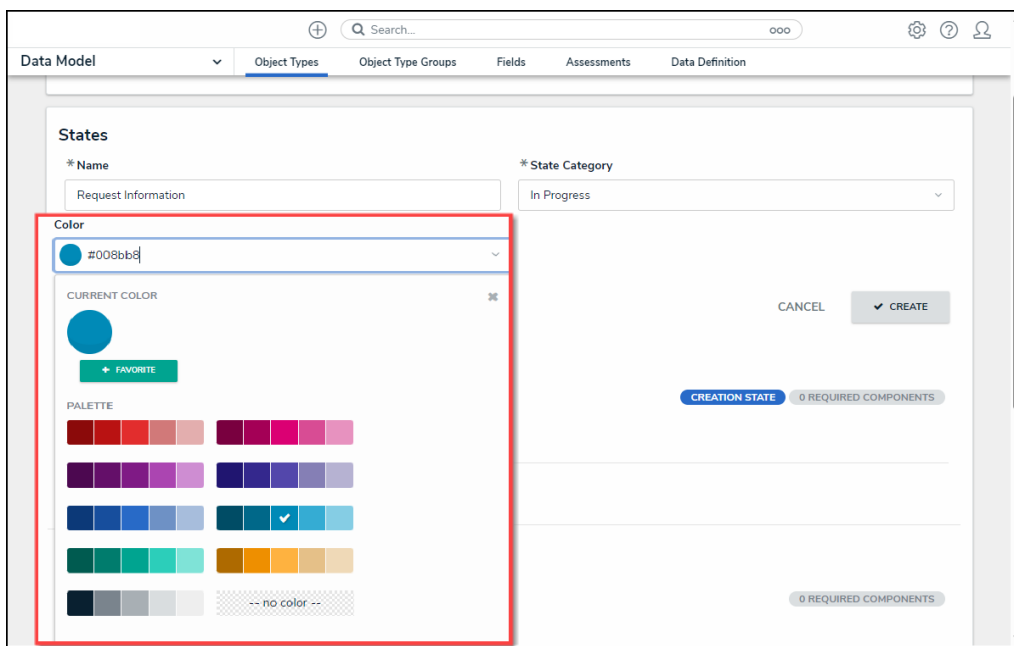5. Enter the **State's Name** in the **Name** field.

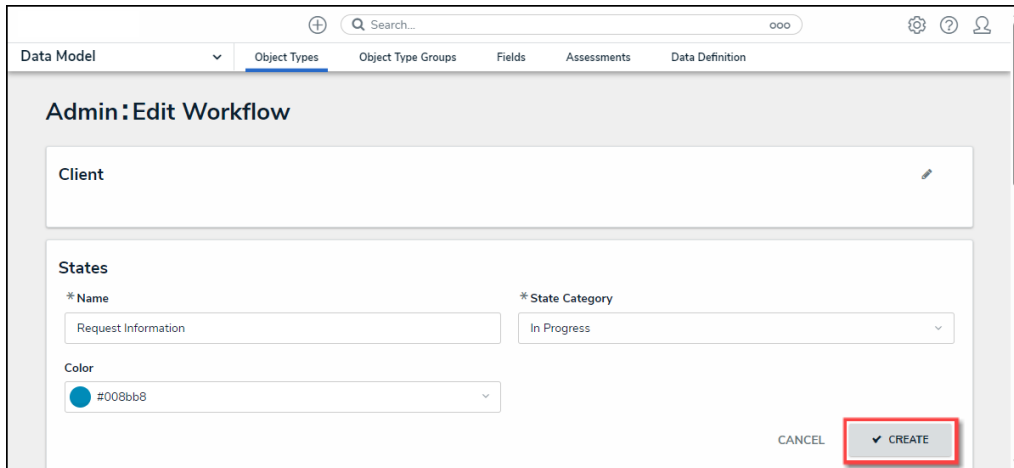6. Select a **Category** from the **State Category** dropdown menu.

State Category Field

7. **(Optional)** Select a **Color Code** from the **Color** dropdown pallet or enter a 6-digit hex color code into the **Color** field.
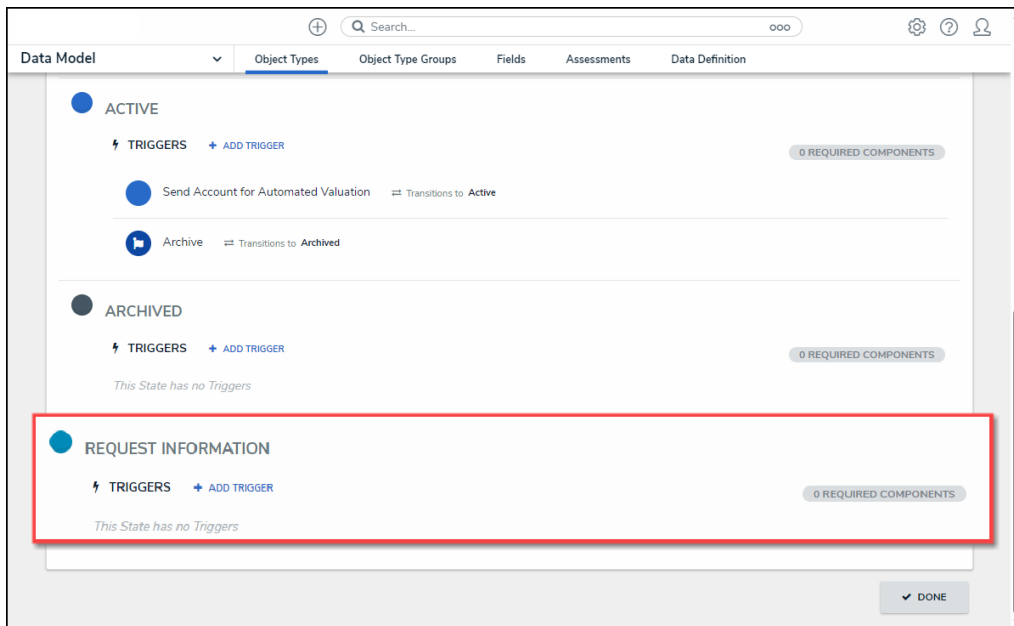

Color Field

8. Click the **Create** button to create the new State.

Create Button

9. The new State will appear at the bottom of the list on the ***Admin: Edit Object Type*** screen.

New State