

Create a New State

Last Modified on 12/11/2024 4:21 pm EST

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.

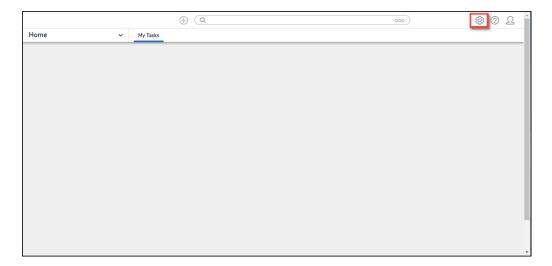
Related Setup/Information

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

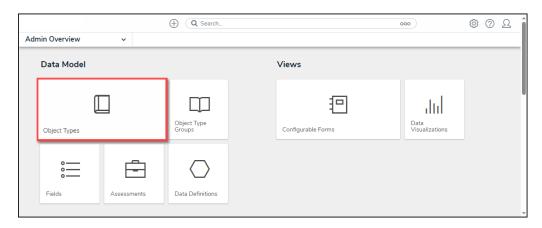
1. From the *Home* screen, click on the **Administration** icon.





Administration Icon

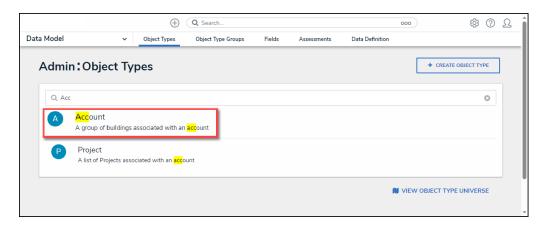
2. From the *Admin Overview* screen, click on the **Configurable Forms** tile under the **Views** section.



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.



			\oplus	Q Search				000	¢3	?	Ω	î
Data	Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition					
/	Admin : Edit C)bje	ct Type									
	Account								ð	P		l
	A group o	of buildin	gs associated with a	an account								
	Workflow											ľ
	CONFIGURE WORK	FLOW]									
	Concatenations											
	CONFIGURE NAME C	ONCAT	ENATION									
	CONFIGURE DESCRI	PTION C	ONCATENATION									

Configure Workflow Button

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

			\oplus	Q Search				000) ف	?	Ω	î
Dat	a Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition					
	Admin:Edit W	/orŀ	cflow									
	Client								dat			
	States							+ ADD	STATE]		ľ
	CREATION											
	7 TRIGGERS	+ AD	DTRIGGER				CREATION STAT	e 0 REQUIRED COMPO	NENTS)		
	Create	≓1	Transitions to Active									
	Save a:	s draft	≓ Transitions to D	raft								*

+ Add State Button

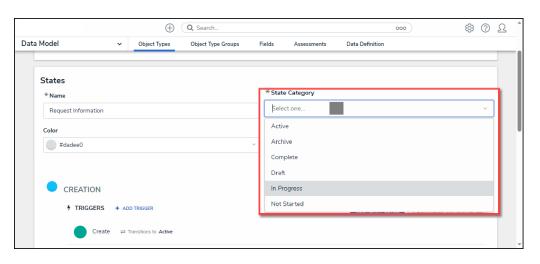
5. Enter the **State's Name** in the **Name** field.

		\oplus	Q Search				000	(Q) (Q)	?	Ω
ta Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
Admin:Edit	Worl	cflow								
Client								ø		
States										
* Name				* Sta	ate Category					
Request Informatio	n							~		
Color										
#dadee0				~						
							CANCEL	✓ CREATE		



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.

		\oplus	Q Search					000	\$ \$	ξ
ta Model	~	Object Types	Object Type Groups	Fie	lds	Assessments	Data Definition			
										1
States										
* Name					* Sta	te Category				
Request Information					In F	rogress			~	
Color										
#008668				~						
CURRENT COLOR				ж						
								CANCEL	✓ CREATE	
+ FAVORITE										
PALETTE							CREATION S	TATE 0 REQUI	RED COMPONENTS	
		✓								
	_									
		no color						0 REQUI	RED COMPONENTS	

Color Field

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



		\oplus	Q Search				000	\$ @ L
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition		
Admin:	Edit Worl	kflow						
Client								1
States *Name				*s	tate Category			
Request Ir	nformation			In	Progress			~
Color								
#008b	b8			~				
							CANCEL	✓ CREATE

Create Button

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

		(-	Q Search				000	ŝ	?	Ω 1
Data Model	*	Object Type	s Object Type Groups	Fields	Assessments	Data Definition				_
•	,	DD TRIGGER It for Automated	Valuation ≓ Transitions to A	ctive			0 REQUIRED COM	PONENTS		
•	ARCHIVED	* Transitions to Arc	hived							
	† TRIGGERS + Al	DD TRIGGER gers					0 REQUIRED COM	PONENTS	5	
							0 REQUIRED C			
Т	his State has no Trigger	"S						OMPONE	1415	Ц
								✓ D0	NE	

New State