

Adding a Condition to a Transition

Last Modified on 06/13/2024 11:10 am EDT

Overview

A **Condition** controls an object's movement to different states or performs a specific action. A **Condition** consists of fields, formulas, and workflow states that create a formula. The formula uses a set of parameters to control whether a transition or action can occur.

Related Information/Setup

For more information on formulas, see the following articles:

- [Formulas Overview](#)
- [Variables, Operators & Functions](#)
- [Null Values in Formulas](#)
- [Formula Examples](#)

Before adding a Condition to a Transition, you must create a State and a Trigger. See the following articles for more information on creating States and Triggers.

- [Create a New State](#)
 - [Add a Trigger and Transition to a State](#)
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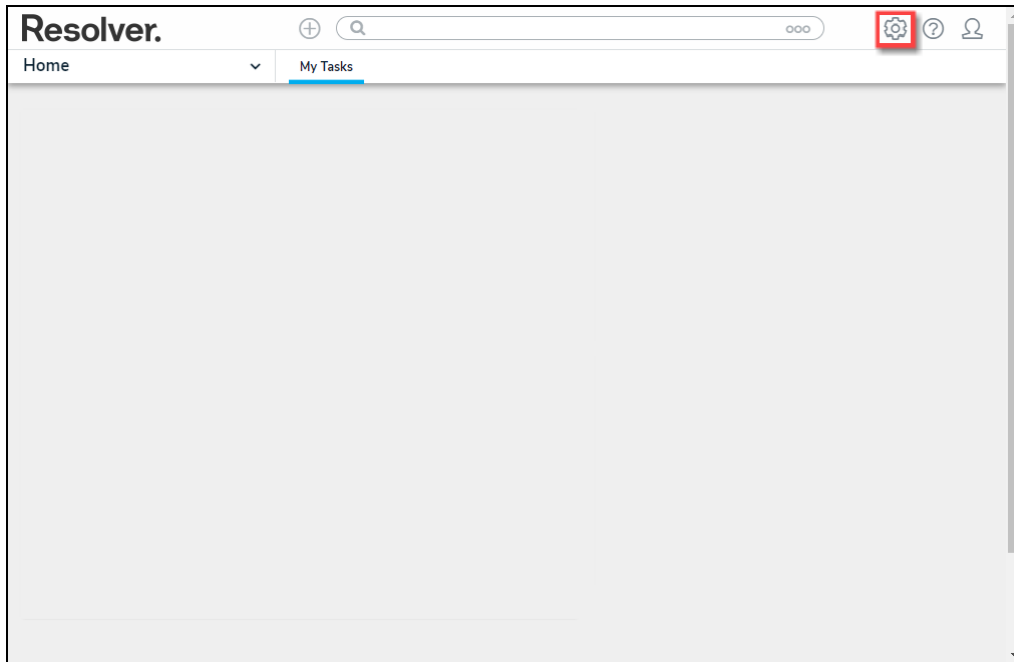
Example

The following example outlines an everyday scenario where you would want to add a condition to a transition.

Your company's policy for severe incidents is to skip the typical review process and transition to the investigation stage. Create a Condition on the Incident object type workflow for the **Submit for Review** trigger. If the "Severe" option is selected. The object is automatically transitioned to the **Investigation Required** state once the **Submit for Review** trigger is selected on a form.

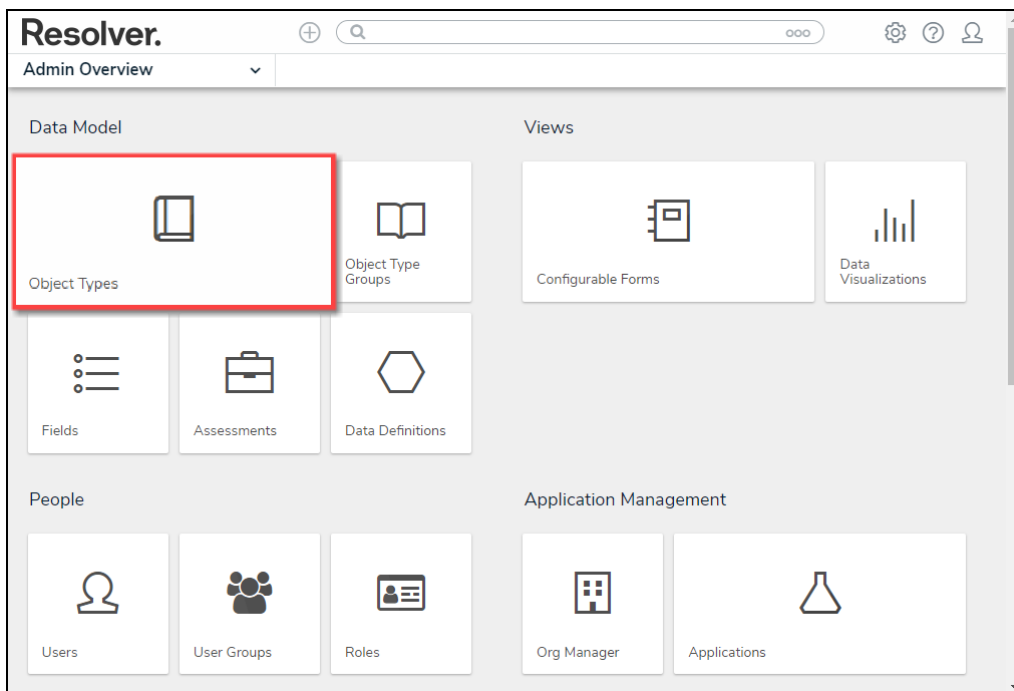
Navigation

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



Administration Icon

- From the **Admin Overview** screen, click the **Object Types** tile on the **Data Models** section.



Object Types Tile

- From the **Object Types** screen, enter an **Object Type Name** in the **Search** field to narrow down the Object Types list.
- Click the **Object Type's Name** you want to edit.

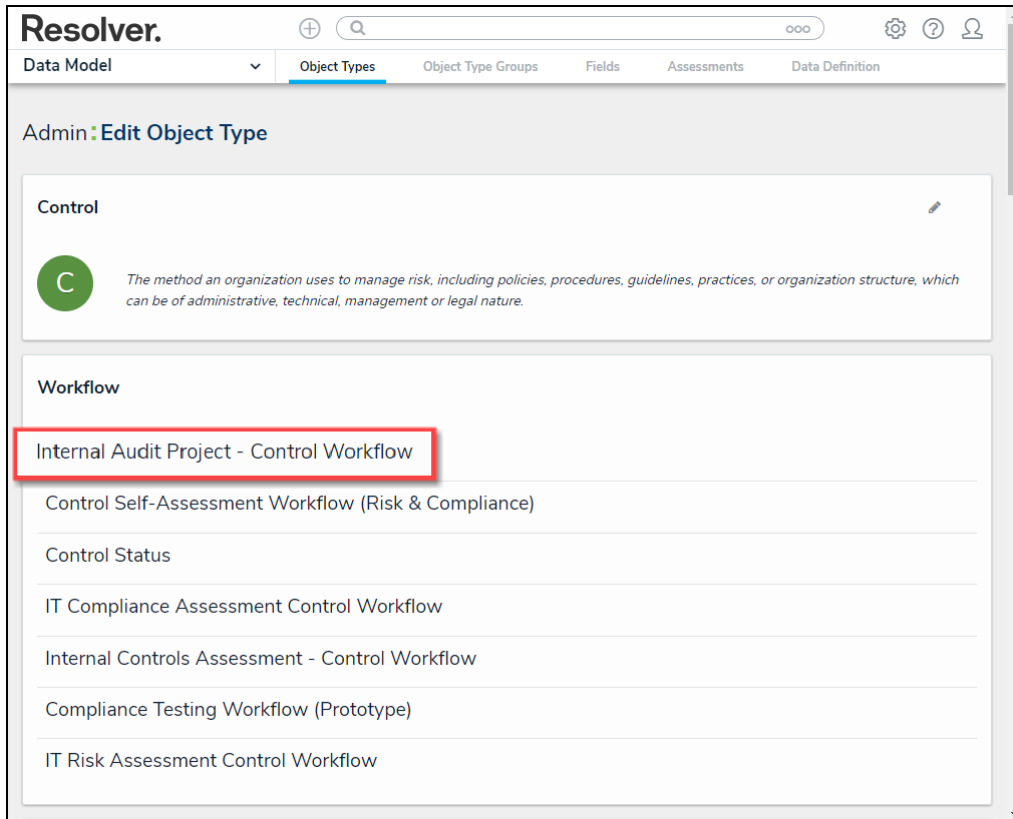
The screenshot shows the Resolver Admin interface. At the top, there is a search bar and navigation tabs: Data Model, Object Types (selected), Object Type Groups, Fields, Assessments, and Data Definition. Below the navigation, the page title is 'Admin: Object Types' and there is a '+ CREATE OBJECT TYPE' button. A search bar contains the text 'Control'. Below the search bar, a list of object types is displayed:

- BU** Business Unit
A segment or subset of the company, which is often independent in its accounting and operational functionality. Primary organizational hierarchy providing security and ownership to key data objects including Incidents, Risks, **Controls** and Incident Types. Some standard reports are anchored at the Business Unit (BU) level.
- C** Certification
Statements signed off on by business users to certify on the effectiveness of **controls**.
- C** **Control** (highlighted with a red box)
The method an organization uses to manage risk, including policies, procedures, guidelines, practices, or organization structure, which can be of administrative, technical, management or legal nature.
- M** Market
Alternate organizational hierarchy providing security and ownership to key data objects including Incidents, Risks, **Controls** and Incident Types, most often used within Brand Protection use cases. Includes link to Business Unit and some anchored standard reports.
- R** Region
Alternate organizational hierarchy providing security and ownership to key data objects including Incidents, Risks, **Controls** and Incident Types, most often used within Loss Prevention use cases. Includes link to Business Unit and some anchored standard reports.
- R** Request
VRM: A request allows members of the business to request a vendor risk assessment. IA & IC: A request is sent by members of the internal audit **controls** team to an audit client/request owner to provide documentation to assist with completion of the audit **control** testing.
- T** Test
A method used to test the operating and design effectiveness of a **control**, which may include various testing methods or strategies.

At the bottom right of the page, there is a link: [VIEW OBJECT TYPE UNIVERSE](#)

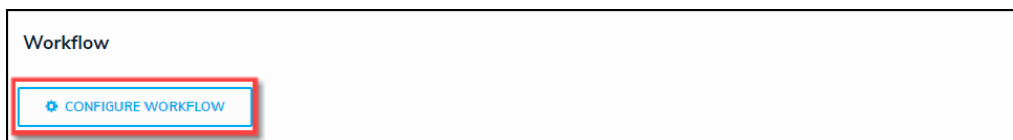
Click the Object Type's Name

5. From the **Edit Object Type** screen, click on a workflow under the **Workflow** section.



Click on a Workflow

6. If there are no workflows listed, click on the **Configure Workflow** button.



Configure Workflow Button

7. From the **Edit Workflow** screen, click a **Trigger** under the **State** section.



Note:

*You must already have a **Trigger** added to a **State** before you can add a condition to a transition.*

Resolver. [Search] [Settings] [Help] [User]

Data Model | **Object Types** | Object Type Groups | Fields | Assessments | Data Definition

Admin: **Edit Workflow**

Internal Audit Project - Control Workflow [Edit]

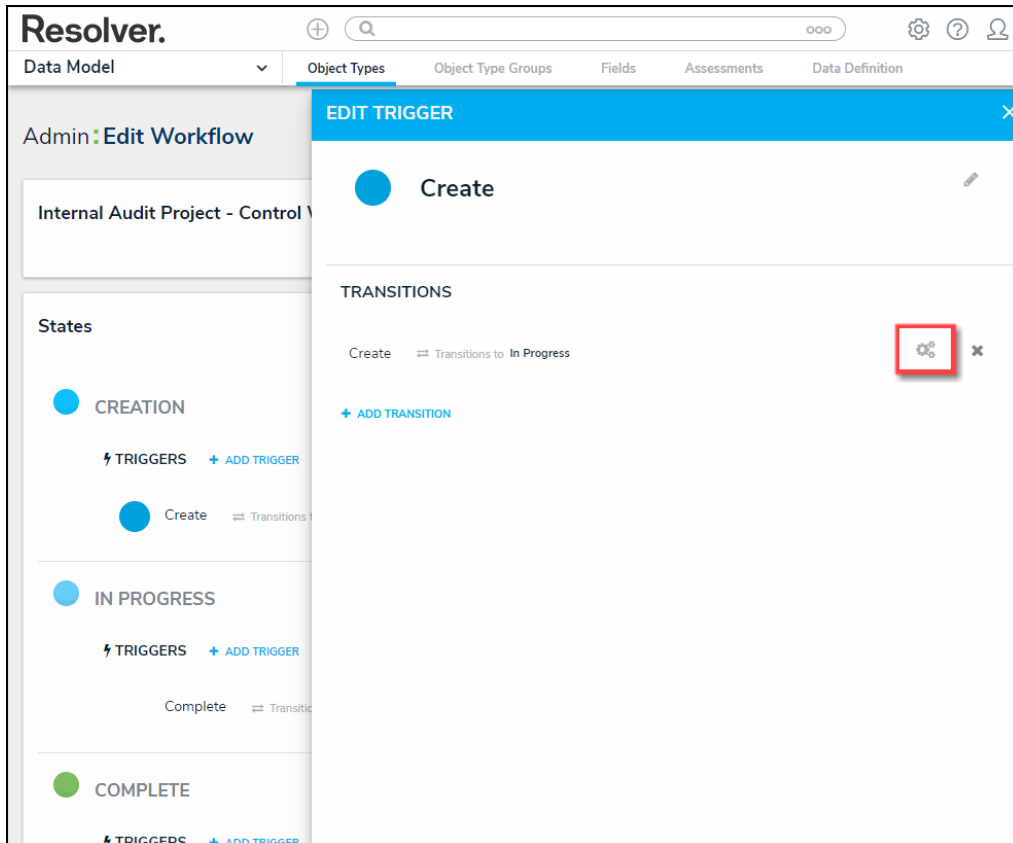
States [ADD STATE]

- CREATION**
 - TRIGGERS [ADD TRIGGER] [CREATION STATE] [0 REQUIRED COMPONENTS]
 - Create** [Transitions to In Progress]
- IN PROGRESS**
 - TRIGGERS [ADD TRIGGER] [0 REQUIRED COMPONENTS]
 - Complete [Transitions to Complete]
- COMPLETE**
 - TRIGGERS [ADD TRIGGER] [0 REQUIRED COMPONENTS]
 - OE: Archive (from Audit Project) [Transitions to Archive]
 - Send Back to In Progress [Transitions to In Progress]
 - [SHOW MORE...]
- ARCHIVE**
 - TRIGGERS [ADD TRIGGER] [0 REQUIRED COMPONENTS]
 - This State has no Triggers*

[DONE]

Click on a Trigger

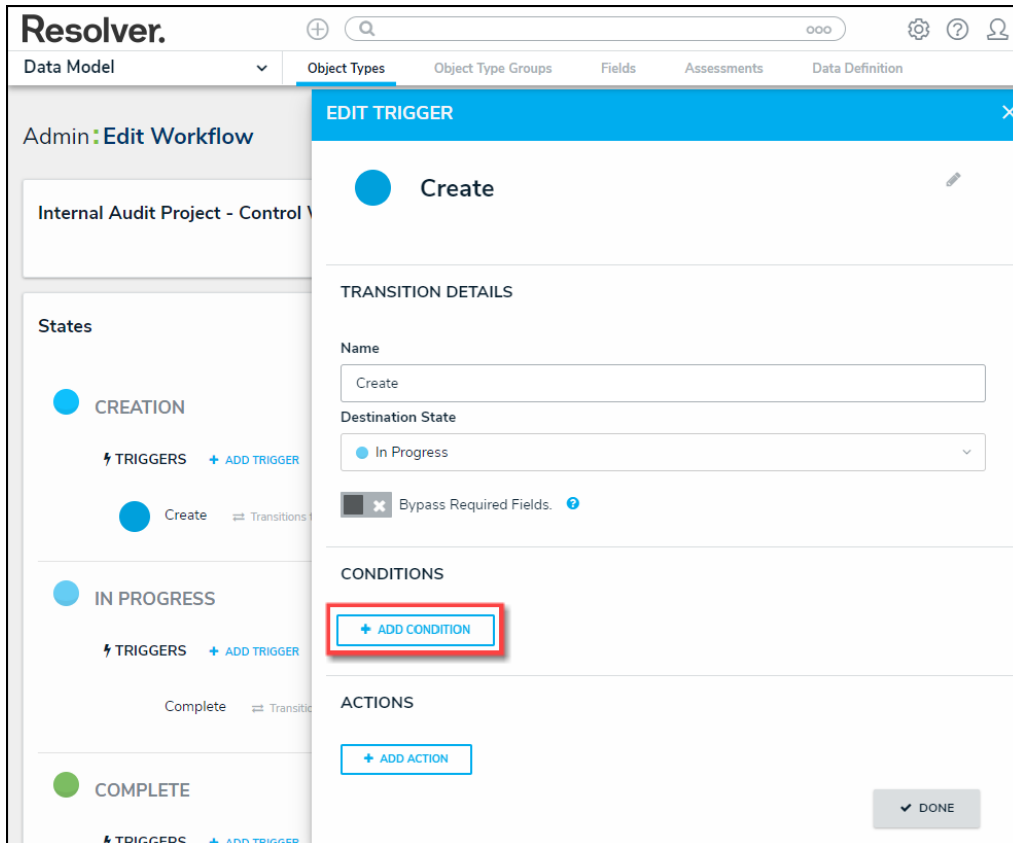
- From the **Edit Trigger** pop-up, click the **Edit** icon next to the transition.



Click the Edit Icon

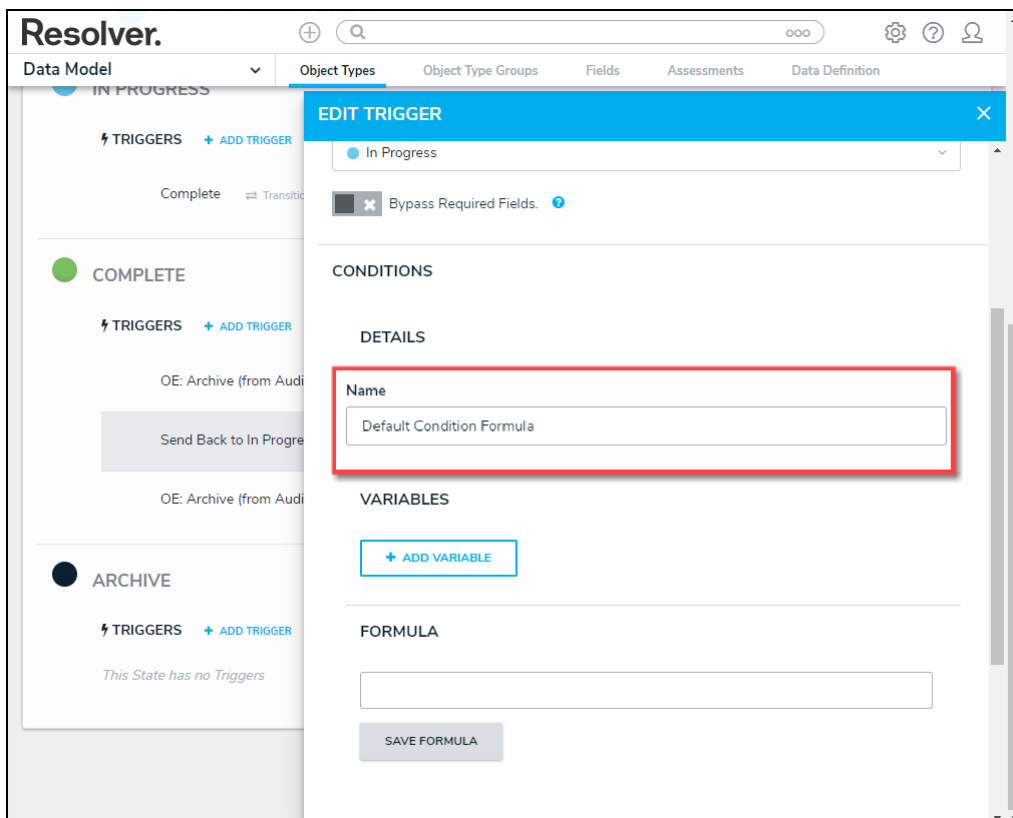
Adding a Condition on a Transition

1. From the **Condition** section, click the **+Add Condition** button.



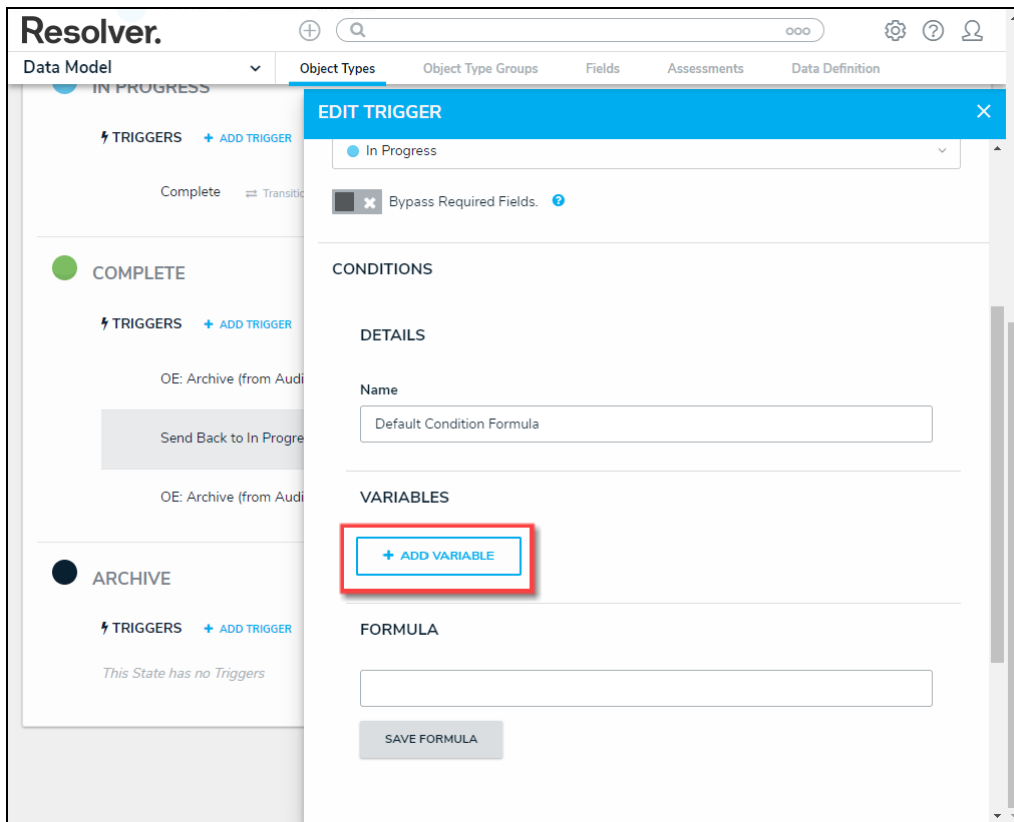
+ Add Conditions Button

2. **(Optional)** Enter a condition name in the **Name** field under the **Details** section. By default, conditions are named **Default Condition Formula**.



Name Field

- From the **Variables** section, click the **+Add Variable** button.



+Add Variable Button

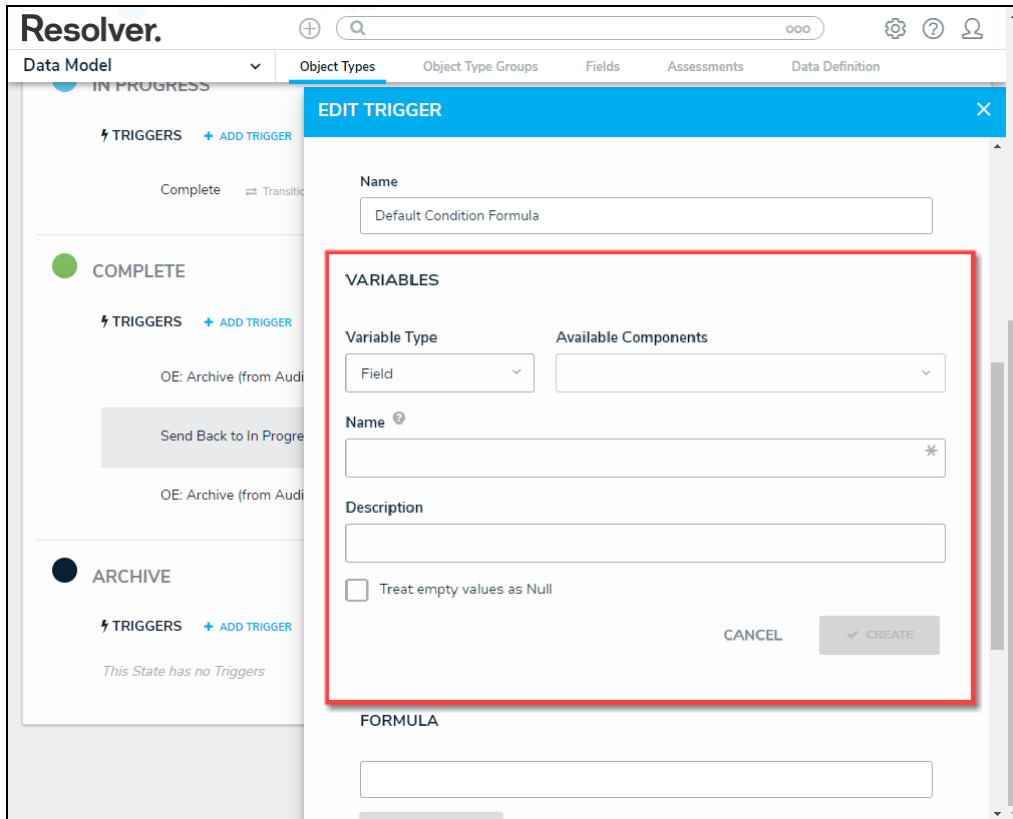
- From the **Variables** section, select a **Variable Type** from the drop-down list. A **Variable** is a value in which the formula calculations are performed.
 - **Field:** After selecting the **Field** variable, the following field will appear:
 - **Available Components:** Select a field or formula from the **Available Components** drop-down field adding it directly to the Object Type.



Note:

Fields must be added to a formula after an Object Type or through an association (Relationship or Reference).

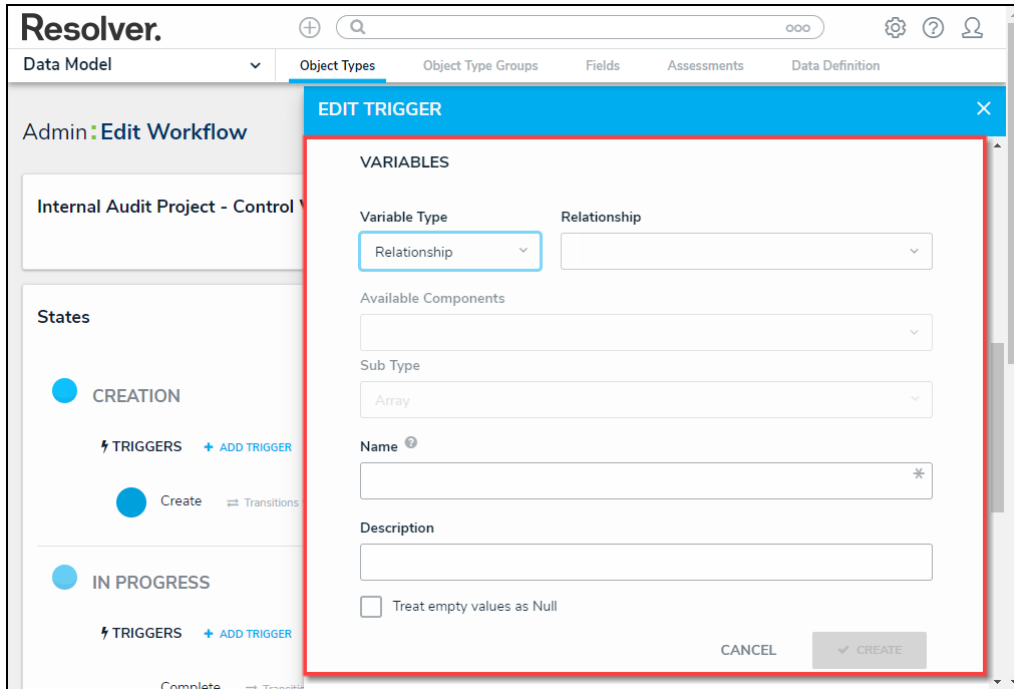
Only numeric fields, date fields, and select lists (numeric values) are accepted. For more information, see the [Fields](#) article.



Variable Type = Field

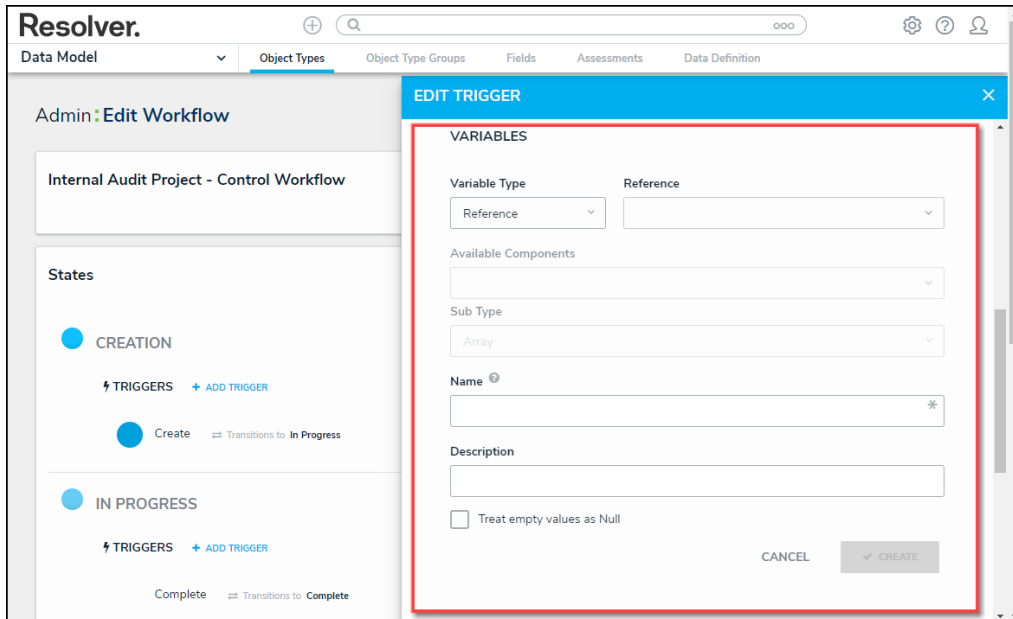
- **Relationship:** After selecting the **Relationship** variable, the following fields will appear:
 - **Relationship:** Select the Object Type **Relationship** from the drop-down list. Relationships connect two or more objects. Relationships must be added to an Object Type to appear on the Relationship drop-down list. See the [Add Relationships to an Object Type](#) article for further information on adding a Relationship to an Object Type.
 - **Available Components:** Select a field or formula from the **Available Components** drop-down field adding it directly to the Object Type.
 - **Sub Type:** Select a **Sub Type** from the drop-down list. Subtypes specify how the data from multiple objects are compiled, calculated, and displayed. For more information on Subtypes, see the Sub Type Table in the [Variables, Operations, & Functions](#) article.
 - **Array:** Creates a set of values from the variable.
 - **Sum:** Calculates a total from the variable's set of values and returns a single number. Select list variables cannot use Sum Sub Types.
 - **Count:** The number of times a variable has been added to an object.
 - **Average:** Calculates an average number from the variable's set of values. Select list variables cannot use Average Sub Types.
 - **Every:** Checks if the variable contains a value on the objects in the relationship/reference.

- **Min:** Calculates the lowest number from the variable's set of values. Select list variables cannot use Min Sub Types.
- **Max:** Calculates the highest number from the variable's set of values. Select list variables cannot use Max Sub Types.



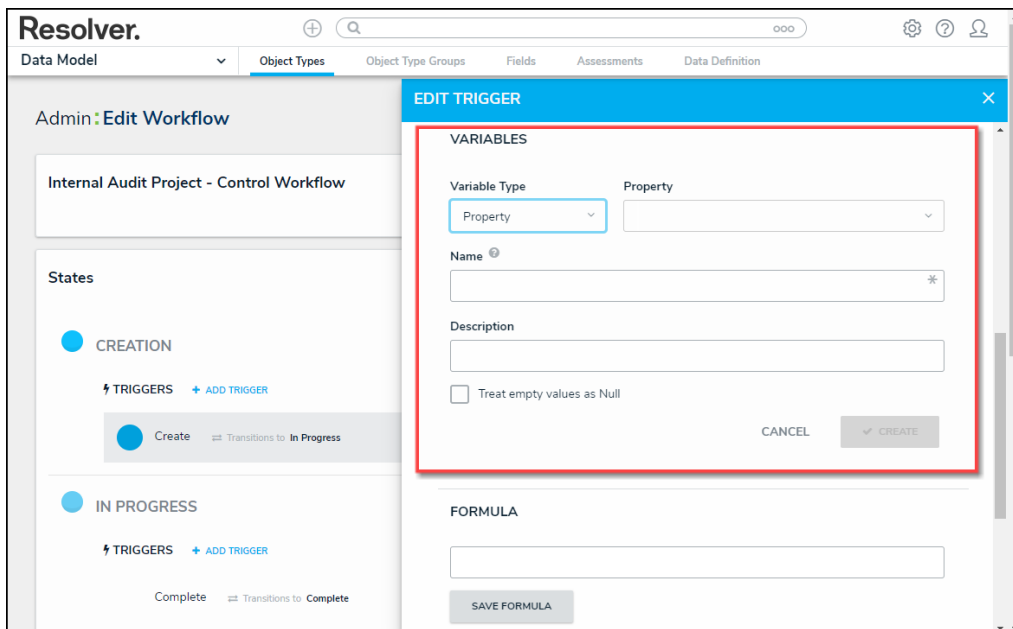
Variable Type = Relationship

- **Reference:** After selecting the **Reference** variable, the following fields will appear:
 - **Reference:** Select the Object Type **Reference** from the drop-down list. References indicate that an object is connected to another object through a relationship. References are automatically created when a relationship is created. For further information on adding a Relationship to an Object Type, see the [Add References to an Object Type](#) article.
 - **Available Components:** Select a field or formula from the **Available Components** drop-down field adding it directly to the Object Type.
 - **Sub Type:** Select a **Sub Type** from the drop-down list. Subtypes specify how the data from multiple objects are compiled, calculated, and displayed.



Variable Type = Reference

- **Property:** After selecting the **Property** variable, the following field will appear:
 - **Property:** Select a **Property** type from the drop-down list:
 - **Is Submitter Confidential:** This property type creates a formula that compares the number of confidential submissions against the number of not confidential submissions for customers that use the **Confidential Reporting Portal**.



Variable Type = Property

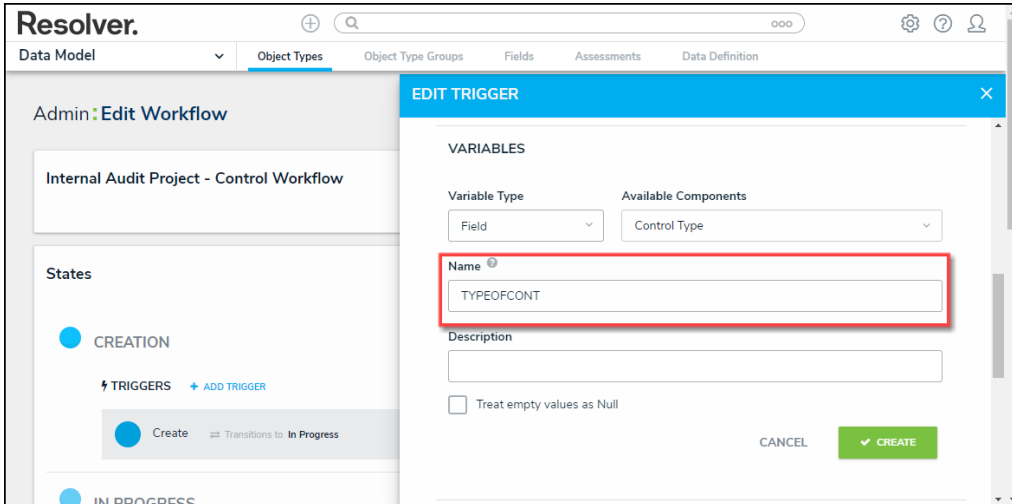
5. The system will automatically populate the Name field with the field or formula's unique ID by default.

6. **(Optional)** Enter a Variable name in the **Name** field.



Warning:

Using a function name (Sub Type Name) in the name field will cause an error.



Variable Name

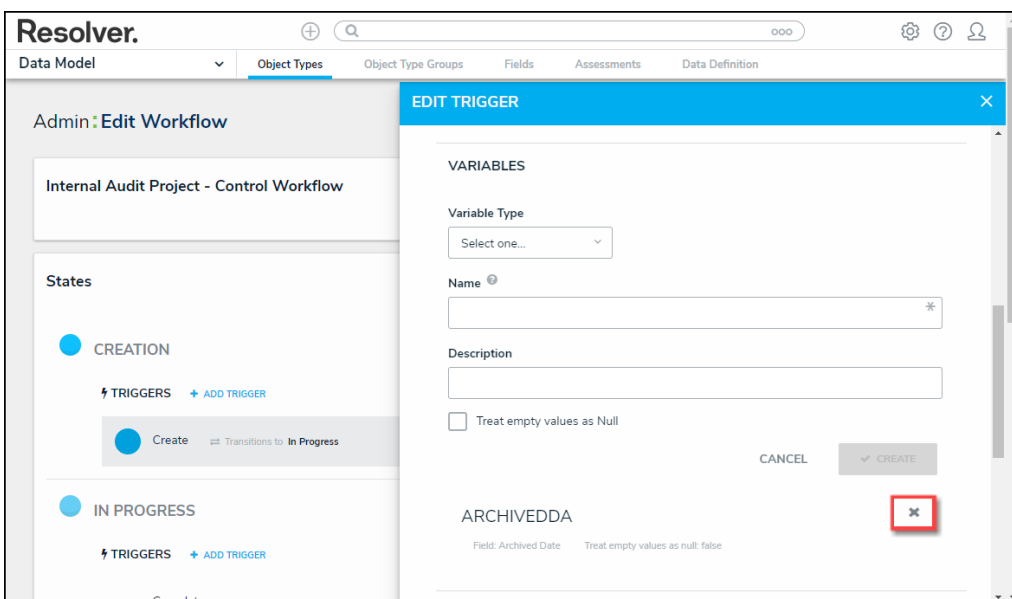
7. **(Optional)** Enter a Variable description in the **Description** field.

8. **(Optional)** Select the **Treat empty values as Null** checkbox, to exclude blank objects from a formula calculation. For more information, see the [Null Values in Formulas](#) article.

9. Click the **Create** button to add the variable.

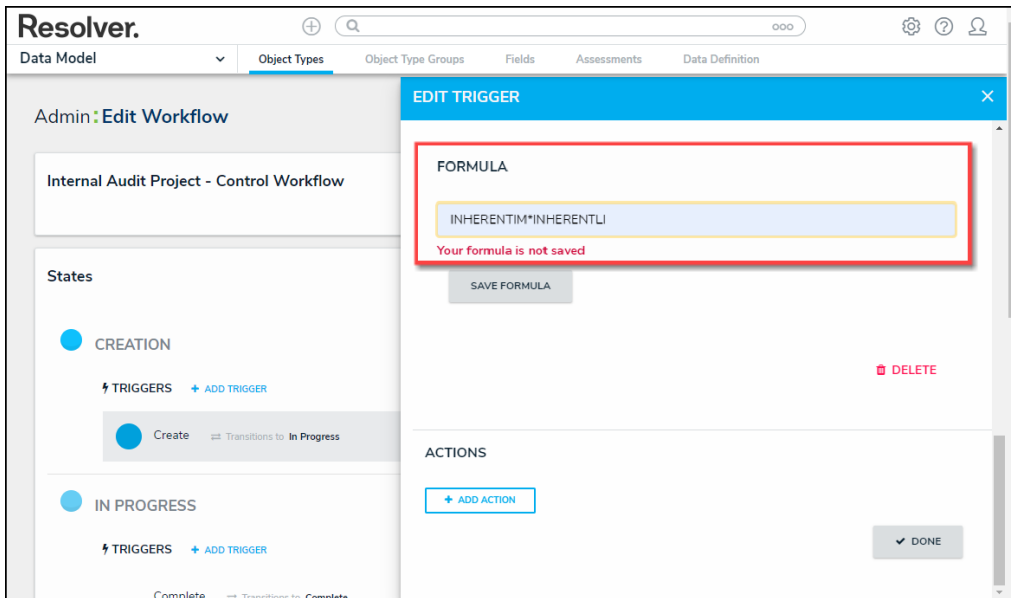
10. Repeat steps 7 - 16 to add additional variables.

11. Click the **x** icon next to the variable to delete the variable.



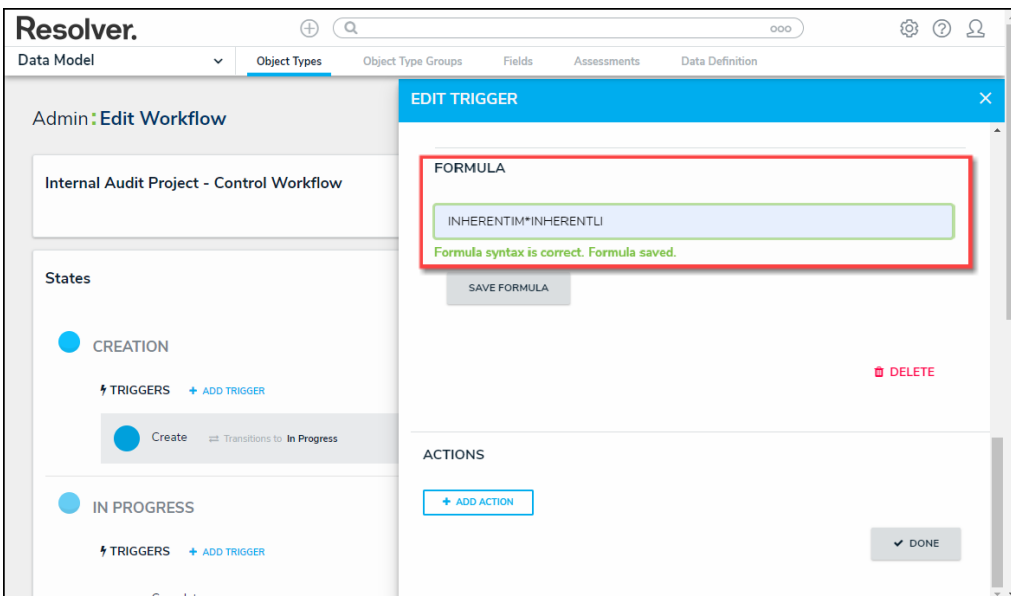
X Icon - Delete a Variable

- From the **Formula** section, enter a **Formula** using the variable name(s) you entered in the **Name** field under the **Variables** section. Include operators and functions in the **Formula** field (e.g., **INCIDENTSE==3**). For more information on Operators, see the Operators Table in the [Variables, Operators, & Functions](#) article.
- A system notification will appear under the **Formula** field, indicating that **Your formula is not saved**.



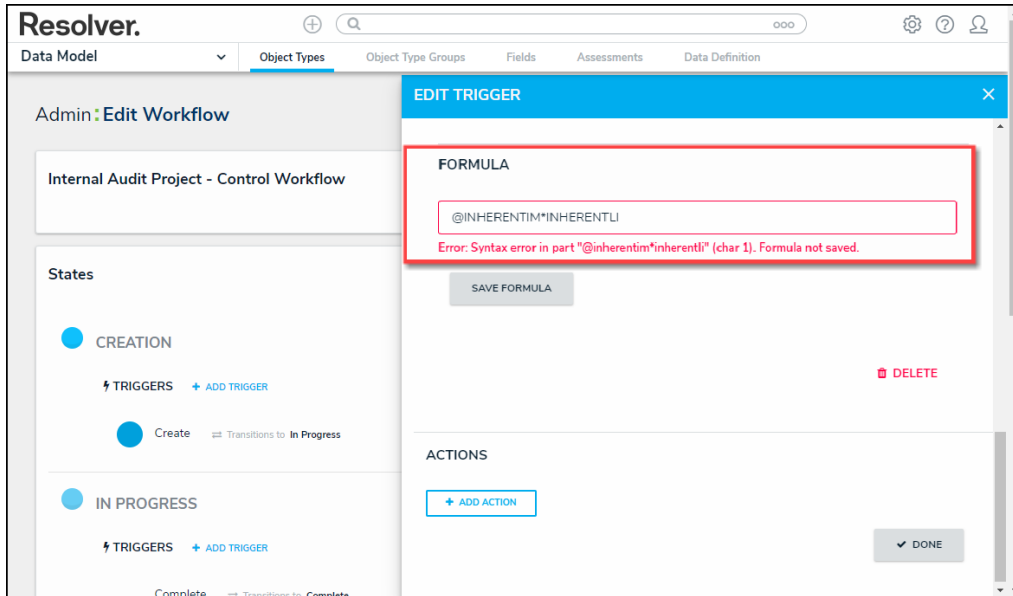
System Notification - Your Formula is Not Saved

- Click on the **Save Formula** button. The system will perform a Syntax Validation on the formula if the formula is:
 - Valid:** A system notification will appear under the **Formula** field; **Formula syntax is correct. Formula saved.**



System Notification - Valid Formula

- **Invalid:** A system notification will appear under the **Formula** field; **Error Syntax error in part (char 1). The formula is not saved.** The error will indicate the character (char) location of the error in the formula and that the formula is invalid and not saved.



System Notification - Invalid Formula

15. Syntax Validation helps to prevent users from saving invalid formula expressions, which can negatively impact APIs.
16. Click the **Done** button to add the Variables to the Object Type.