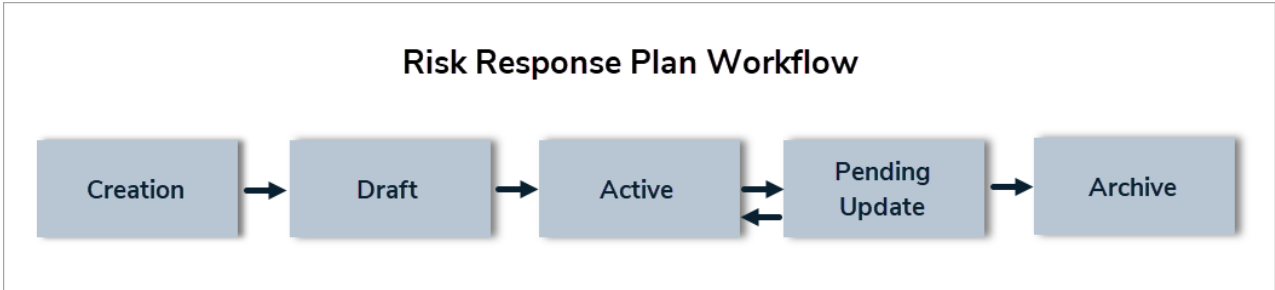


# Configure the Workflow

Last Modified on 07/15/2020 4:07 pm EDT

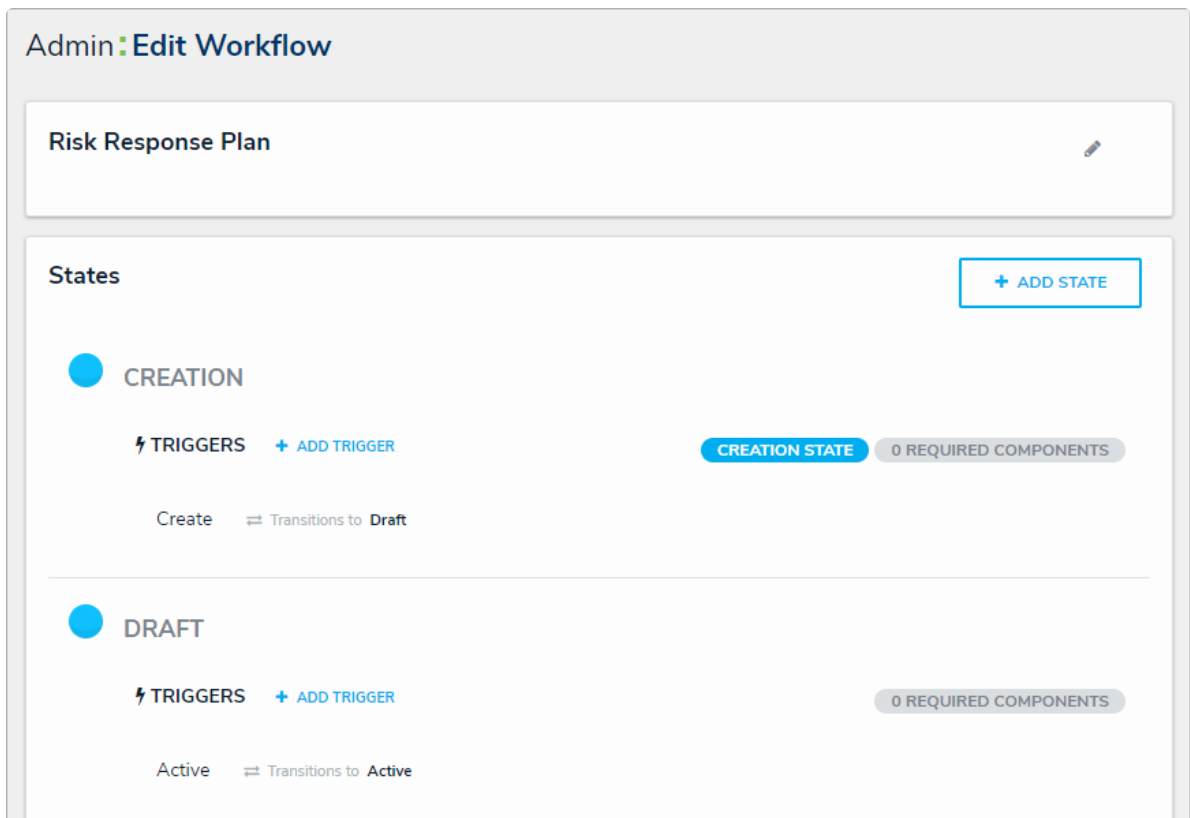
For more detailed information on workflows, see the [Workflows](#) section in the **Resolver Core Administrator's Guide**.



## Create & Configure States

To create and configure the workflow states:

1. Click the icon in the top bar > **Object Types** in the **Data Model** section.
2. Begin typing **Risk Response Plan** in the search field, then click the object type to open the **Edit Object Type** page.
3. Click **Configure Workflow** on the **Edit Object Type** page.



The Edit Workflow page.

4. Click **Add State**.
5. Enter **Pending Update** in the **Name** field, select **In Progress** from the **State Category** dropdown menu, then click **Create**.

6. Click the **Creation** state, then select the **Company** reference in **Required Components**.
7. Click the **Pending Update** state, then select the **Plan** field in **Required Components**.
8. Click the following states, then type or paste the following colors codes in the **Color** fields:
  - a. Draft: #DADEE0 (Grey)
  - b. Active: #66CDF4 (Blue)
  - c. Pending Update: #FFBF02 (Yellow)
  - d. Archived: #092030 (Black)

**EDIT STATE**  
Archived

**Name**

**Color**

● #092030

**State Category**

---

**REQUIRED COMPONENTS**  
Select any Fields that must contain a value in order to move into the next Workflow State

*The Edit State palette.*

## Create Triggers & Transitions

Note that the following section provides instructions for configuring the sequence of the workflow, **not** the order that the states appear on-screen. Should you wish to have the workflow states reordered, contact [Resolver Support](#).

### To create triggers and transitions:

1. From the **Risk Response Plan** workflow, click **Add Trigger** in the **Active** state section.
2. Select **Timed** from the **Type** dropdown menu.
3. Enter **Send for Update** in the **Name** field.
4. Select **Nightly** from the **Frequency** dropdown menu.

**ADD TRIGGER** [X]

Type  
Timed [v]

Name  
Send for Update

Description

Color  
[Color Picker]

Frequency ?  
Nightly [v]

CANCEL [CREATE]

*The Add Trigger palette.*

5. Click **Create** to display the **Edit Trigger** palette.
6. Click **Add Transition**.
7. Enter a name for the transition in the **Name** field, then select **Pending Update** from the **Destination State** dropdown menu.

**EDIT TRIGGER** [X]

[Color Icon] **Send for Update** [Edit Icon]

**TRANSITIONS**

Name  
Send for Update Transition

Destination State  
[Color Icon] Pending Update [v]

CANCEL [CREATE]

*The Edit Trigger palette.*

8. Click **Create**.

9. Click **Add Trigger** in the **Pending Update** state section.
10. Select **Button** from the **Type** dropdown menu.
11. Enter **Complete Update** in the **Name** field.

**ADD TRIGGER** ✕

Type  
Button

Name  
Complete Update

Description


Color

CANCEL ✓ CREATE

12. Click **Create**.
13. Click **Add Transition**.
14. Enter a name for the transition, then select **Active** from the **Destination State** dropdown menu.
15. Click **Create**.

## Create Conditions

### To create workflow conditions:



1. From the **Risk Response Plan** workflow, click the **Send for Update** trigger.
2. Click the  icon next to the transition.
3. Click **Add Condition**.

## Send for Update

---

### TRANSITION DETAILS

**Name**

**Destination State**  
 Pending Update 

---

### CONDITIONS

[+ ADD CONDITION](#)

---

### ACTIONS


[+ ADD ACTION](#)


[✓ DONE](#)


*The Transition Details section of the Edit Trigger palette.*

4. Enter **Check for Date of Next Review** in the **Name** field.
5. Click **Add Variable**, then select **Field** from the **Variable Type** dropdown menu.
6. Select **Date of New Review** from the **Available Components** dropdown menu.

### VARIABLES

**Variable Type**  

**Available Components**  

**Name** 

**Description**

Treat empty values as Null

[CANCEL](#) [✓ CREATE](#)

*The Variables section.*

7. Click **Create**.
8. Paste **timeDiff(DATEOFNEXT,today(),"days")<=0** in the **Formula** field. This formula ensures the trigger will run only if the **Date of Next Review** has the current (or earlier) date selected.




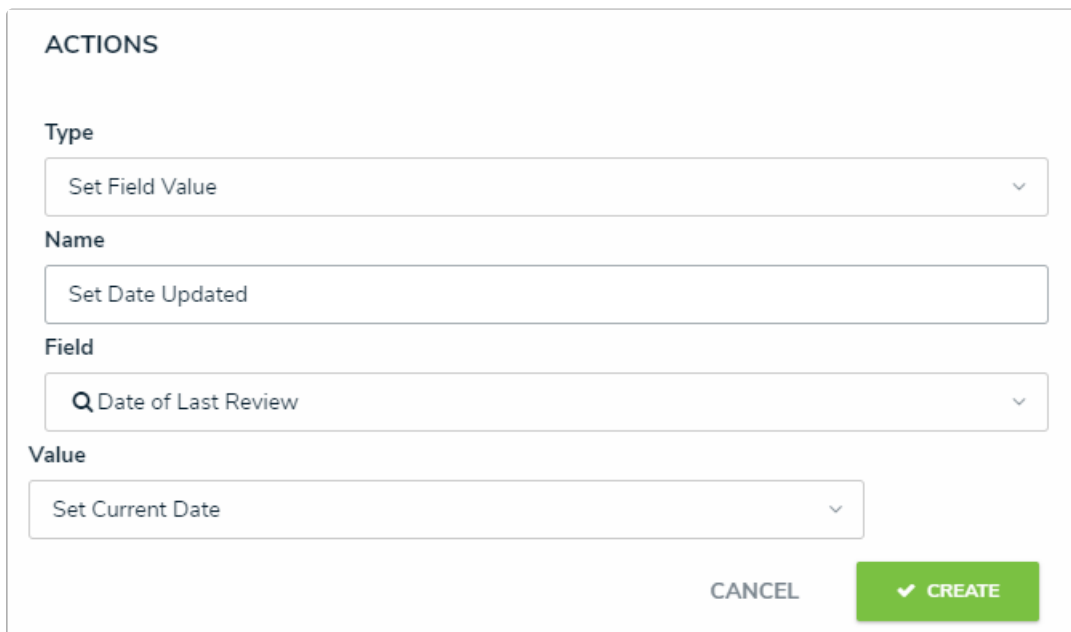
The screenshot shows a rectangular box with the title "FORMULA" at the top left. Inside the box is a text input field containing the formula: `timeDiff(DATEOFNEXT,today(),"days")<=0`.

*The Formula section.*

## Create Workflow Actions

### To create the Set Date Updated action:

1. From the **Risk Response Plan** workflow, click the **Complete Update** trigger.
2. Click the  icon next to the transition.
3. Click **Add Action**.
4. Select **Set Field Value**, then enter **Set Date Updated** in the **Name** field.
5. Select **Date of Late Review** from **Field**.
6. Select **Set Current Date**.



The screenshot shows a form titled "ACTIONS". It contains four dropdown menus: "Type" (Set Field Value), "Name" (Set Date Updated), "Field" (Q Date of Last Review), and "Value" (Set Current Date). At the bottom right, there are two buttons: "CANCEL" and a green "CREATE" button with a checkmark.

*The Actions section on the Edit Trigger palette.*

7. Click **Create**.

### To create the Date of Next Review action:

1. From the **Complete Update** trigger, click **Add Action**.
2. Select **Clear Fields** from the **Variable Type** dropdown menu.
3. Enter **Clear Date of Next Review** in the **Name** field.
4. Select **Date of Next Review** from **Field**.

5. Click **Create**.

[<< Previous](#)

[Next >>](#)