Resolver.
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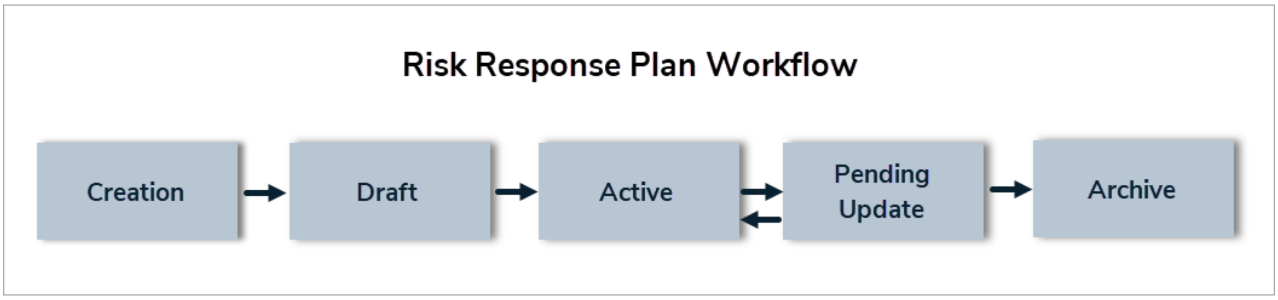
Configure the Workflow

Last Modified on 03/12/2025 10:48 am EDT

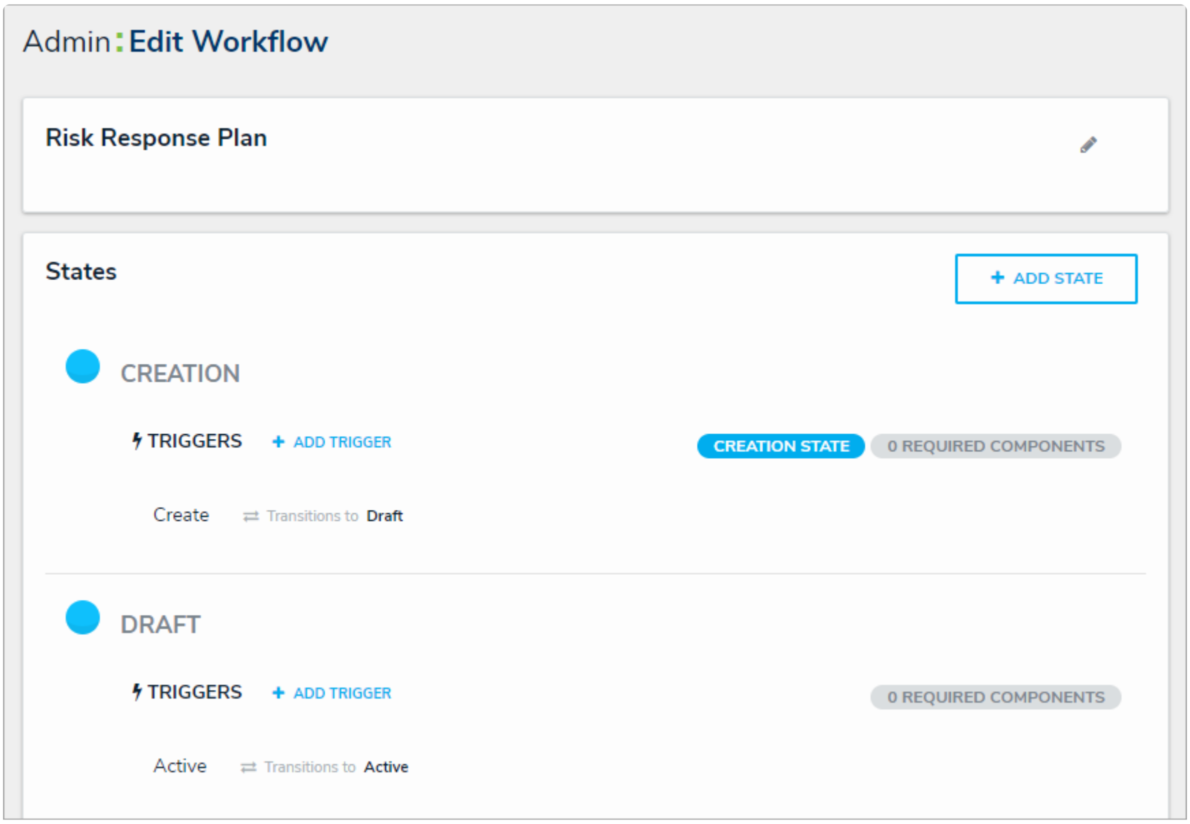
For more detailed information on workflows, see the Workflows section in the **Resolver Core Administrator's Guide**.



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)

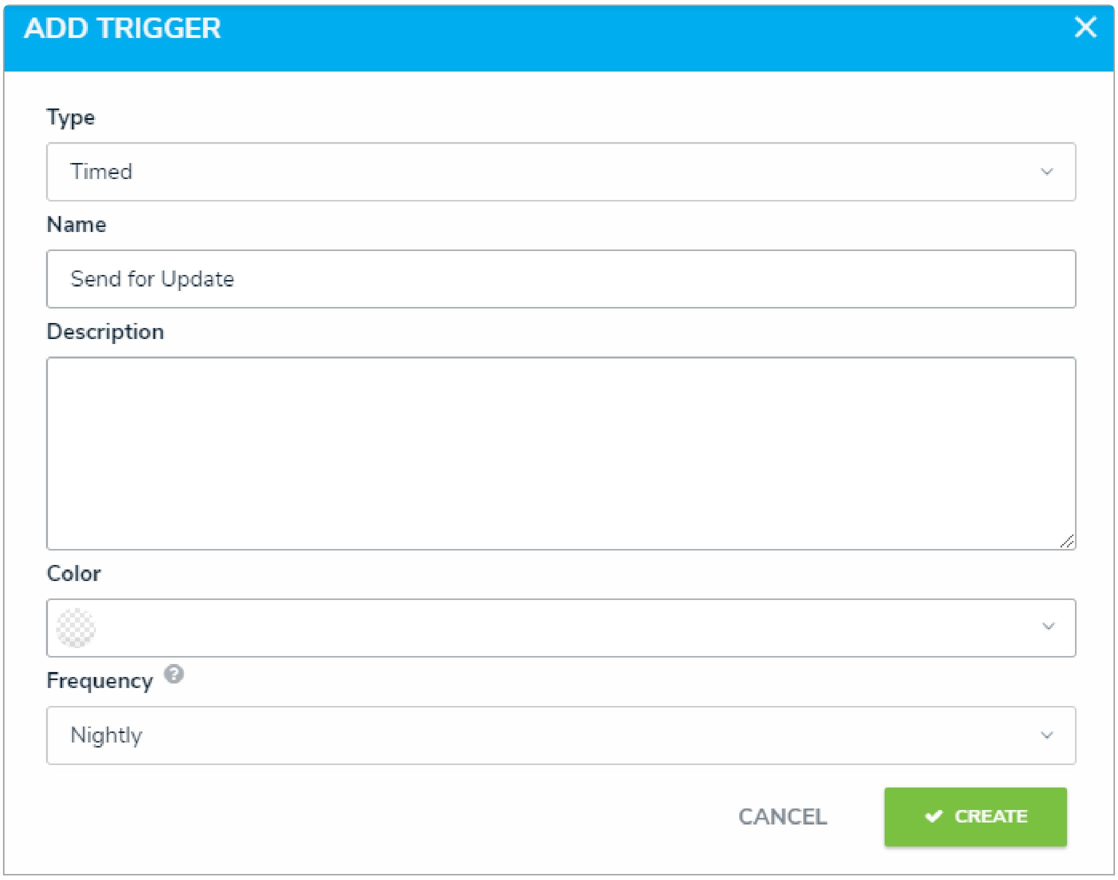
The Edit State palette.

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.

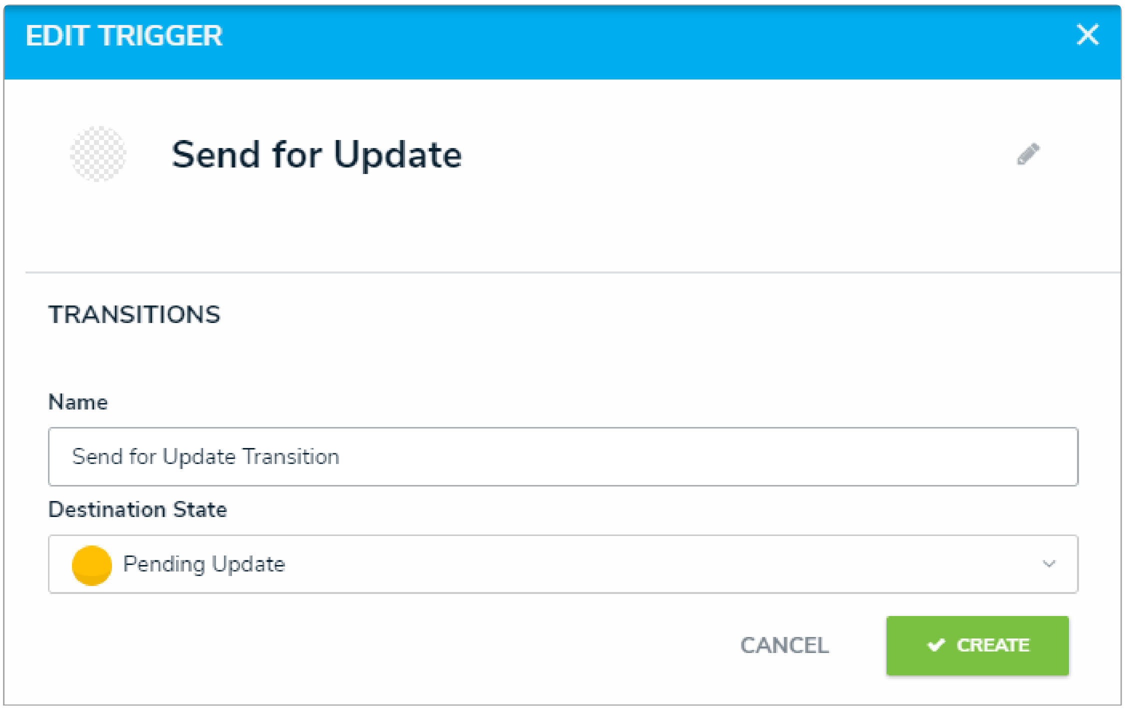
To create triggers and transitions:

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.



The Add Trigger palette.

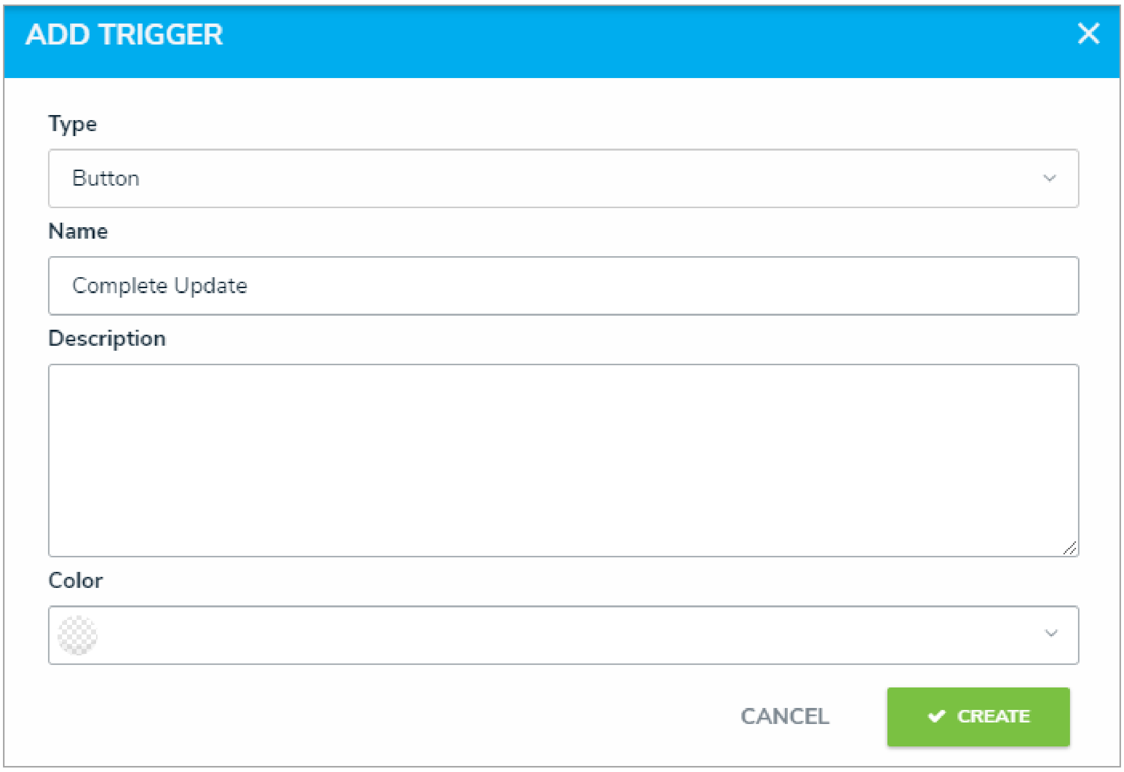
5. Click **Create** to display the **Edit Trigger** palette.
6. Click **Add Transition**.
7. Enter a name for the transition in the **Name** field, then select **Pending Update** from the **Destination State** dropdown menu.



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.

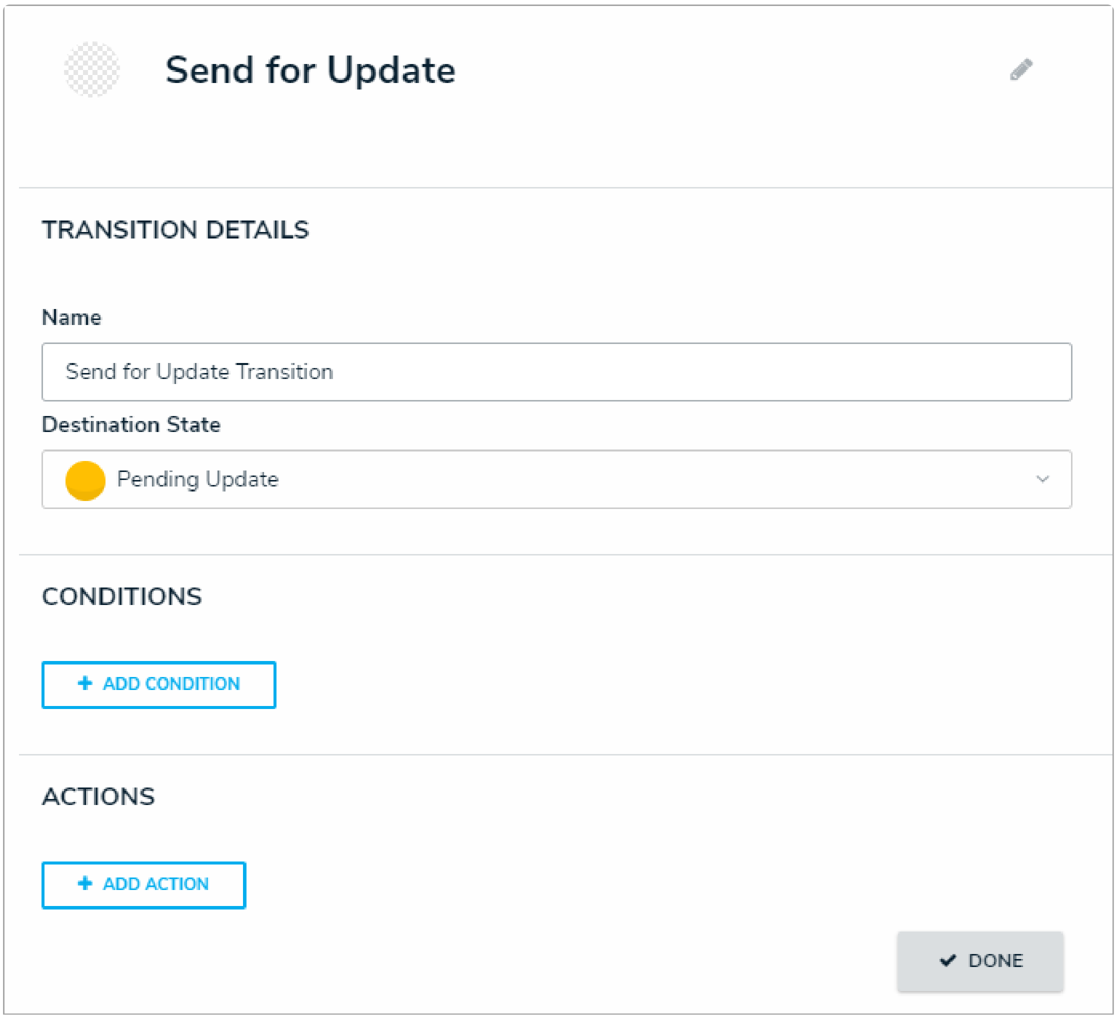


12. Click **Create**.
13. Click **Add Transition**.
14. Enter a name for the transition, then select **Active** from the **Destination State** dropdown menu.
15. Click **Create**.

Create Conditions

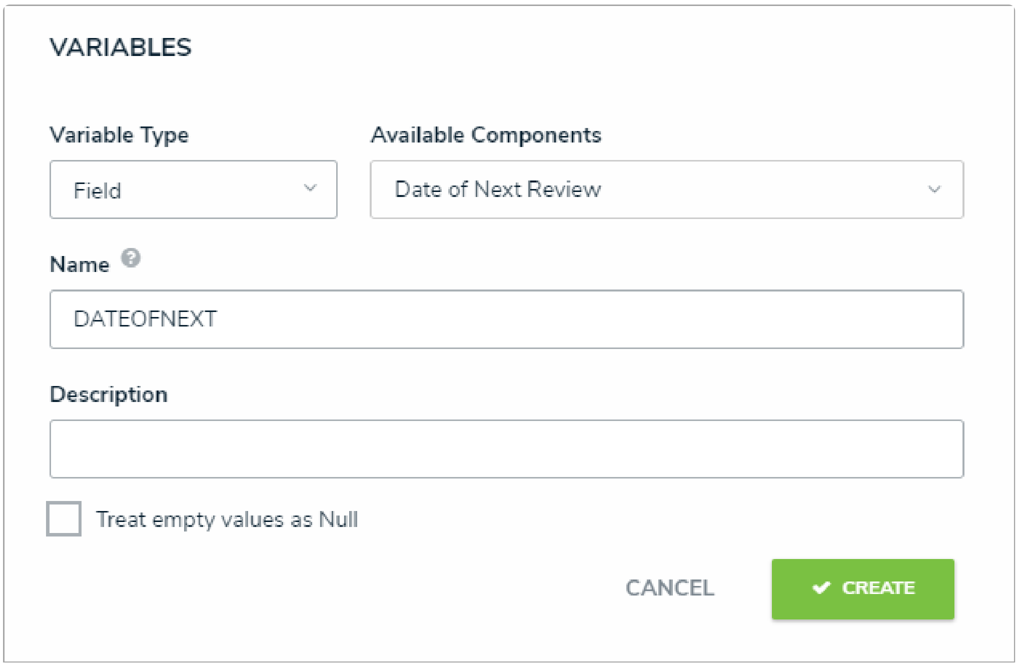
To create workflow conditions:

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**.



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.



The Variables section.

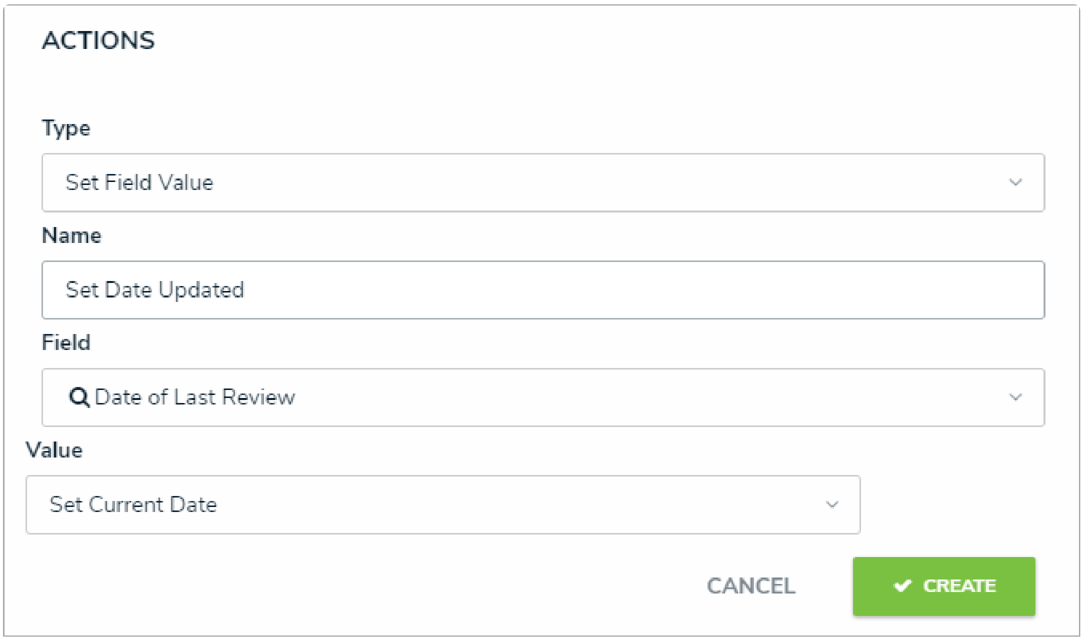
7. Click **Create**.
8. Paste **timeDiff(DATEOFNEXT,today(),"days")<=0** in the **Formula** field. This formula ensures the trigger will run only if the **Date of Next Review** has the current (or earlier) date selected.

The 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 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**.

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