

# Add a Condition to a Transition

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## 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.

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## 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.

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## Navigation

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

*Administration Icon*

2. From the **Administration Settings** menu, click the **Admin: Overview** link.

*Admin: Overview Link*

- 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 list.
- Click the **Object Type's Name** you want to edit.

*Click the Object Type's Name*

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

*Click on a Workflow*

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

*Configure Workflow Button*

- 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.

*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

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

*+ Add Conditions Button*

- (Optional)** Enter a condition name in the **Name** field under the **Details** section. By

default, conditions are named **Default Condition Formula**.

*Name Field*

3. **(Optional)** Enter a brief condition description in the **Description** field.

*Description Field*

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

*+Add Variable Button*

5. 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*

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

7. **(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*

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

*Description Field*

9. **(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.

*Treat Empty Value as Null Checkbox*

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

*Create Button*

11. Repeat steps 7 - 16 to add additional variables.
12. Click the **x** icon next to the variable to delete the variable.

*X Icon - Delete a Variable*

13. **(Optional)** Click the **Insert Variable** button and select a variable from the dropdown list to use within the **Formula** field.

*Insert Variable Button*

14. 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.
15. A system notification will appear under the **Formula** field, indicating that **Your formula is not saved.**

*System Notification - Your Formula is Not Saved*

16. 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*

17. Syntax Validation helps to prevent users from saving invalid formula expressions, which can negatively impact APIs.

18. Click the **Done** button to add the Variables to the Object Type.