Workflows

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Create a New State

States represent the various stages of the data collection and review process (e.g. Create, Triage, Review, Investigate, Close, etc.). States allow you to narrow down your search results, control where an object is created or viewed in an application, which fields must be completed during certain stages, and which state the object will transition to by adding triggers to the state. When a new object type is created, a default workflow state is created with it (which includes the **Creation**, **Draft**, **Active**, and **Archived** states). These states can be deleted or supplemented with additional states as needed (except for the Creation state, which cannot be deleted and allows for only limited configuration).

Once created, the new state will appear in the workflow, which you can then select when creating new transitions on other states. You can also select states to create **Relationship** or **Reference** variables in formulas or workflow conditions, which can provide a count of the objects currently in the specified state or check if some or all of the objects are in that state and return a true or false result. You can select states from the object type's workflow or any assessment workflows related to the object type.

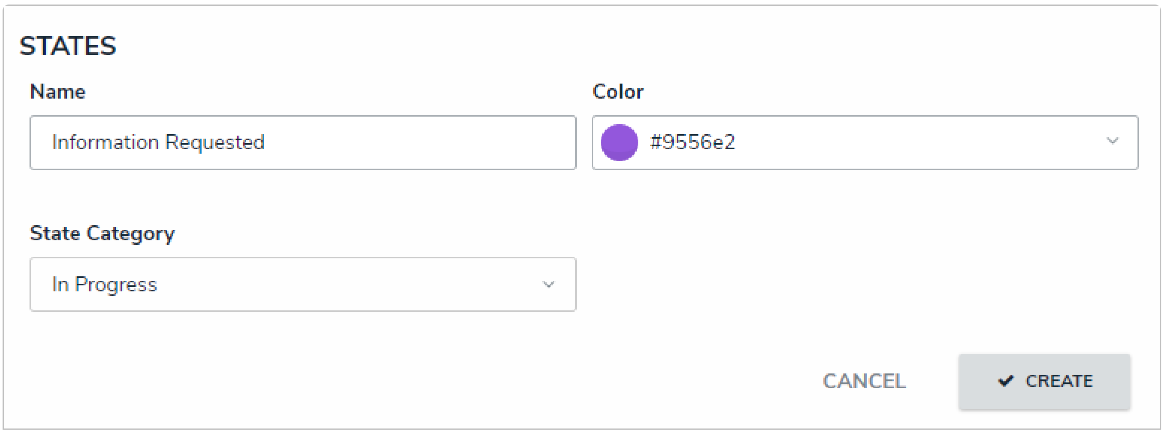
To mark certain fields, properties, or roles as required when the object is in a particular state, or to change the state's name or color, see Edit or Delete a State. To add triggers, transitions, or actions to your new state, see Add a Trigger & Transition to a State.

To create a new state:

1. Click the icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click **Configure Workflow** on the **Edit Object Type** page. If there are multiple workflows saved to the object type, click one in the list.
4. Click **Add State**.
5. Enter the state name in the **Name** field.
6. Click the **Color** dropdown menu to reveal the color picker and select a new color for the label. You can also type a hex color into this field to select a color.
7. Select a state category from the **State Category** dropdown menu to classify the new state.

> Though the **State Category** field is required, full functionality of this feature will be available in an upcoming release.

8. Click **Create**.



Creating a new state.

A new state. New states don't have any triggers or transitions saved to them, but new states can be selected on transitions on other states.

After clicking **Create**, your new state will appear in the workflow, below existing states. You can select this state when creating new transitions on other states. To add triggers, transitions, or actions to your new state, see Add a Trigger & Transition to a State.

Edit the Workflow Name or Description

To edit the workflow name or description:

1. Click the icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click the icon next the workflow name near the top of the page.
4. Make your changes to the **Name** or **Description** fields as needed.
5. Click **Done** when finished.

Add a Trigger & Transition to a State

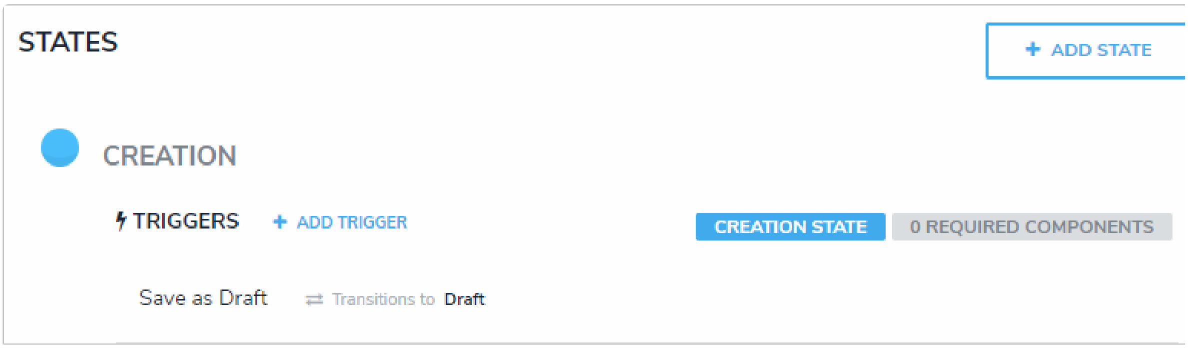
A **trigger** is what causes an object to move from one state to another. There are three types of triggers:

- **Button**: These triggers are added to configurable forms as buttons that a user clicks to move the object from its current state to another state (e.g. clicking the Submit for Review trigger on a form will move the object to the In Review state).
- **Timed**: Moves an object to a specified state and can perform actions on a nightly basis. For example, you can create a trigger that notifies users that a deadline is overdue or remind users to launch an assessment on a particular day. This trigger type cannot be added to the creation state. See the Timed Triggers & Nightly Emails Schedule article for more information

on when these triggers are executed.

> If a single state contains multiple timed triggers with conditions, you must create separate transitions for each timed trigger.

- **Consume Orchestration Event:** This trigger uses an existing Send Orchestration Event action on another state or object type to automatically transition an object to another predefined state (e.g. Closing an audit object will also automatically close all issue objects in an Open state). Note that this trigger type cannot be added to the Creation state.



The Creation state with a trigger configured to transition to the object to the Draft state.

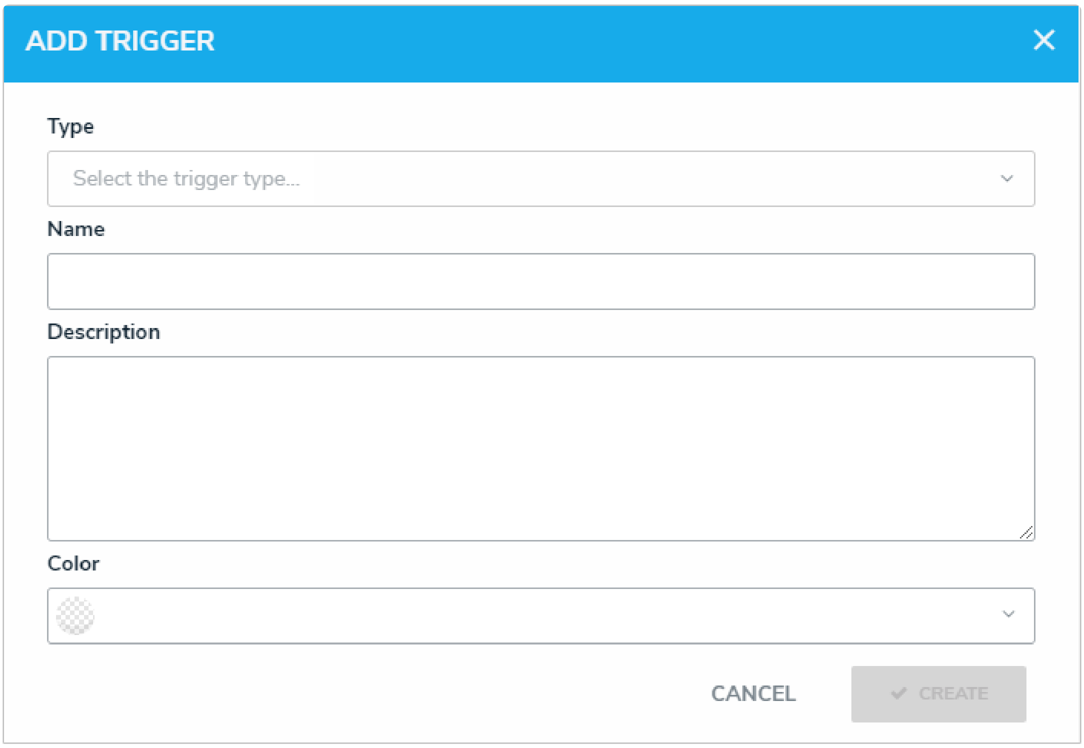
The state an object is moved to is specified by creating a **transition** on the trigger. On that transition, you can create **actions** that perform certain functions once the object has moved to the next state or **conditions** that define certain requirements that must be met before an object is moved to the next state and/or an action is performed. See the Actions on Transitions category and the Add a Condition to a Transition article for more information. Multiple triggers and transitions can be saved to a single state.

> All triggers must have transitions saved to them in order to successfully move the object from state to state.

Instructions

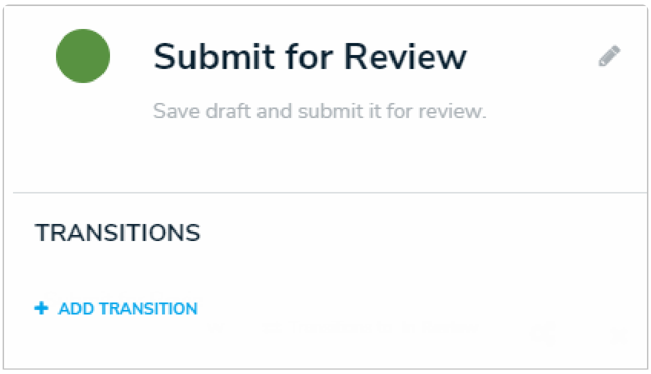
To add a trigger and transition to a state:

1. Click the icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click **Configure Workflow** (if only one workflow exists) or select the appropriate workflow.
4. Click **Add Trigger** below the state you want to add the trigger to.
5. Select either **Button**, **Timed**, or **Consume Orchestration Event** from the **Type** dropdown menu.



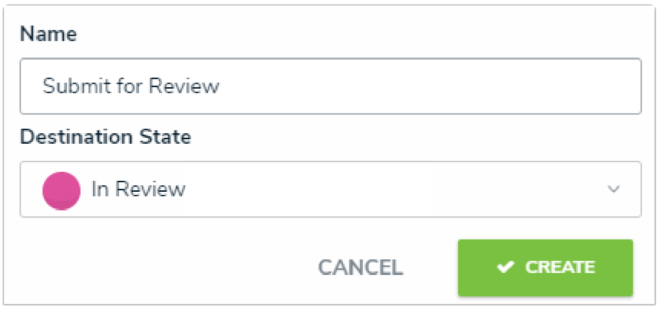
The Add Trigger palette.

6. Enter a name for the trigger in **Name** field. If you selected the **Button** type, this will appear as a button for users to click on configurable forms.
7. **Optional:** Enter a description of the trigger or include other information, such as its destination state, in the **Description** field. For the **Button** trigger type, a description will appear when clicking the icon next to the trigger when creating a configurable form and will help you identify which state and transition the trigger is associated with.
8. **Optional:** Click the **Color** dropdown menu to reveal the color picker and select a new color for the button as it will appear on a form. You can also type a hex color into this field to select a color.
9. If you selected the **Timed** trigger type, select **Nightly** from the **Frequency** dropdown menu.
10. If you selected the **Consume Orchestration Event** trigger type, select a previously created event action from the **Orchestration Event** dropdown menu. If you have not yet created an event action, you can leave this field blank and edit the trigger once an event is created. Note that options will appear in this dropdown only if an event action has been previously created using a data definition that includes the object type you're currently configuring. See Add an Orchestration Event Action on a Transition for more information.
11. Click **Create**.
12. Click the new trigger below the state on the **Edit Workflow** page to open the **Edit Trigger** palette.
13. Click **Add Transition**.



The Edit Trigger palette.

14. Enter a name for the transition in the **Name** field.
15. From the **Destination State** dropdown menu, select the state the object should move to.



Selecting the destination state for a new transition on a button trigger.

16. Click **Create**.
17. Follow the steps above to create additional triggers and transitions as needed.

Once a trigger and transition have been created, you can add conditions or actions to that transition.

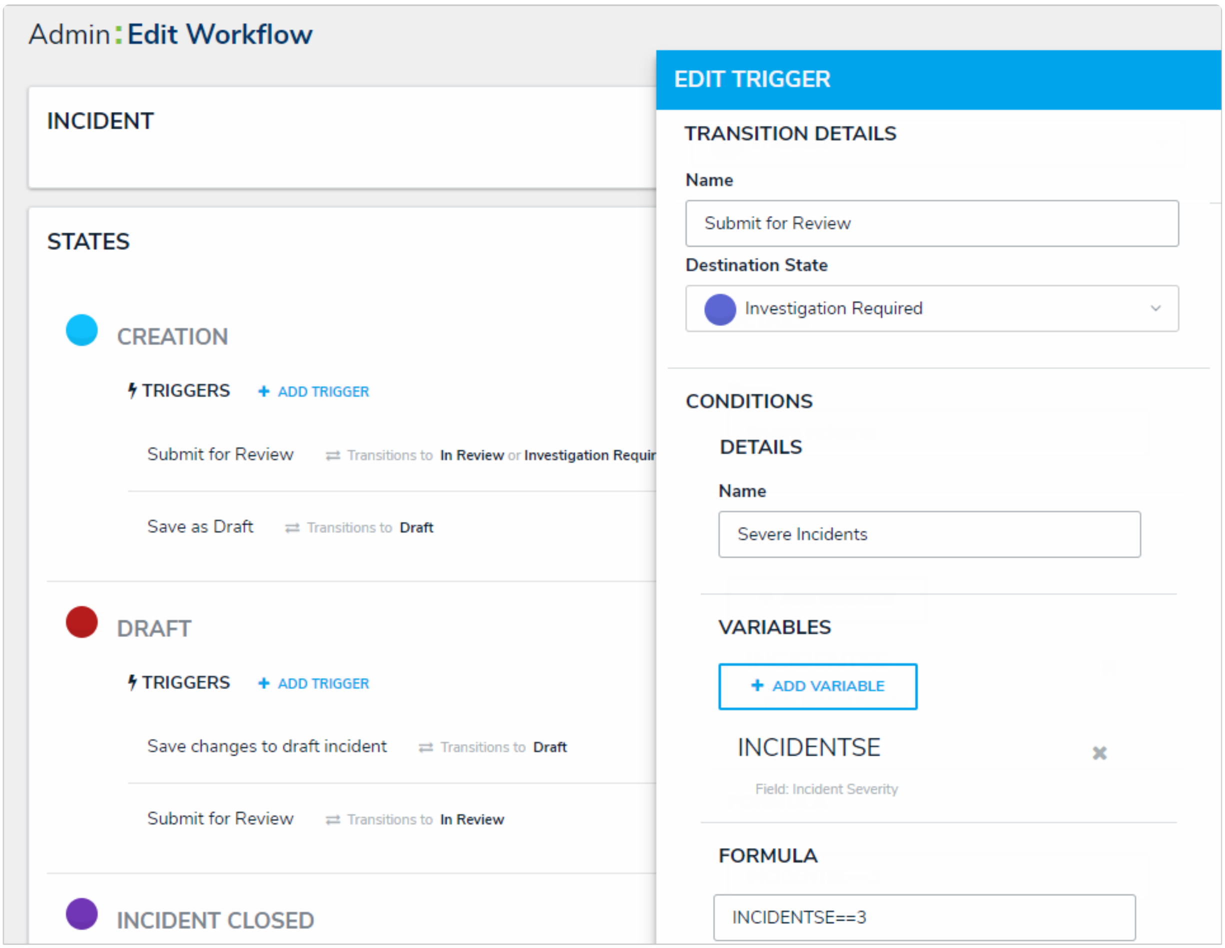
Add a Condition to a Transition

Conditions allow you to control whether an object is moved to a certain state or if an action will be performed. This is done by using fields, formulas, and workflow states to create a formula with parameters that must be met before the transition or action can occur. For more information on formulas, see the following articles:

- Formulas Overview
- Variables, Operators & Functions
- Null Values in Formulas
- Formula Examples

EXAMPLE

Your company has a policy that severe incidents must skip the typical review process and must be investigated immediately. As such, for the Incident object type workflow, you create a condition on the Submit for Review trigger that if the “Severe” option has been chosen on the Incident Severity select list, the object is automatically transitioned to the Investigation Required state once the Submit for Review trigger is clicked on a form.

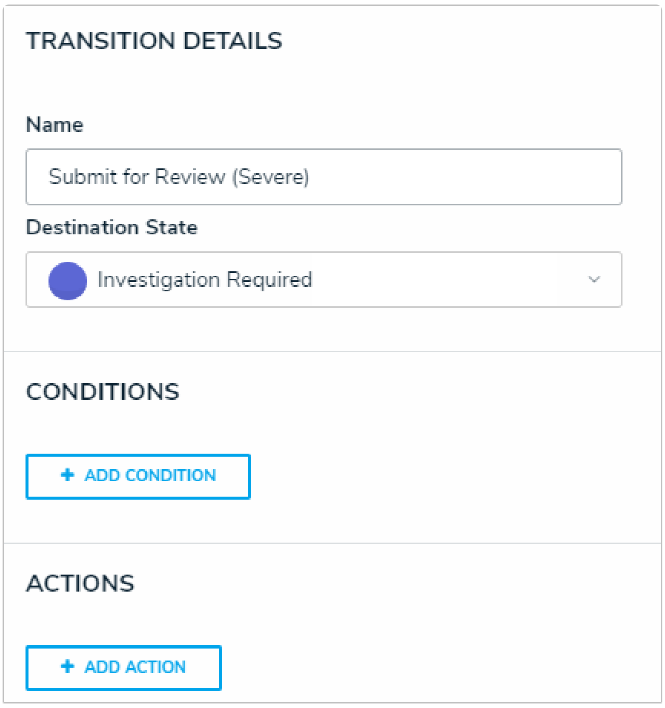


A condition on a transition, as displayed in the Edit Trigger palette on the right.

To add a condition on a transition:

> Ensure the state, trigger, and transition you wish to add the condition to have already been created and configured prior to following the steps below.

1. From the **Edit Workflow** page, click a trigger to open the **Edit Trigger** palette.
2. Click the icon next to the transition.
3. Click **Add Condition**.

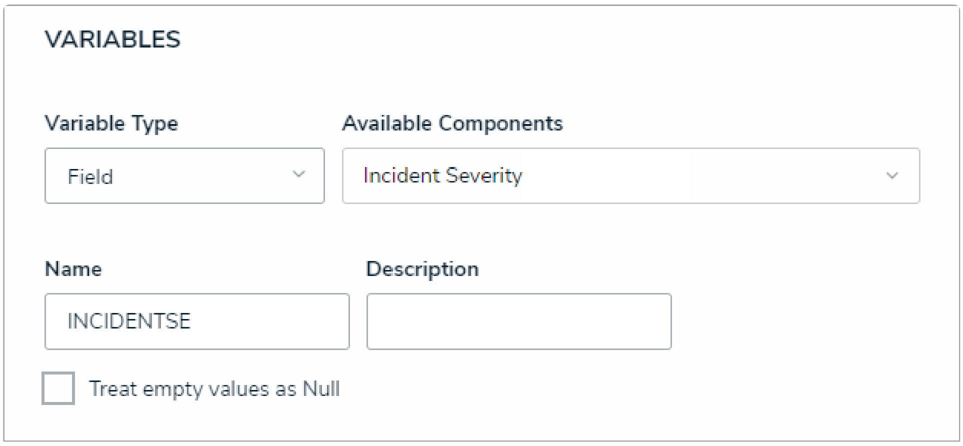


The Edit Trigger palette where you can add conditions and actions.

4. **Optional:** Enter a name for the condition in the **Name** field. Conditions are named **Default Condition Formula** by default.
5. Click **Add Variable**.
6. Select either **Field**, **Relationship**, or **Reference** from the **Variable Type** dropdown menu:
   - If you selected **Field**, choose a field or formula from the **Available Components** dropdown menu. The options in this dropdown are fields or formulas added directly to the object type.
   - If you selected **Relationship** or **Reference**:
     1. Select a relationship or reference saved to the object type from the **Relationship** or **Reference** dropdown menu.
     2. Select a field, formula, or workflow state from the **Available Components** dropdown menu. These are the fields, formulas, or states saved to the object type(s) in the relationship or reference.
     3. Select a variable sub-type from the **Sub Type** dropdown menu to specify how the data from multiple objects will be compiled or calculated. See the **Field & Formula Variables** and/or **Workflow State Variables** sections of the Variables, Operators & Functions article for more information on the available sub-types.

        > Fields can be added to formulas only if they've been added directly to the object type or if they're saved to an object type associated through a relationship or reference. Only numeric fields, date fields, and select lists with numeric values added to their options are accepted in formulas. See the Fields category for more information.

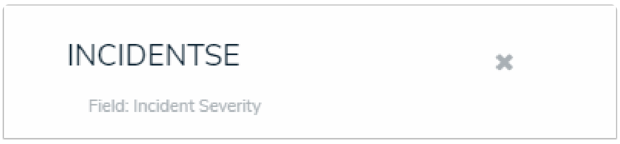
7. **Optional:** Enter a name for the variable in the **Name** field. By default, the unique ID of the field or formula is automatically populated.



A new condition formula.

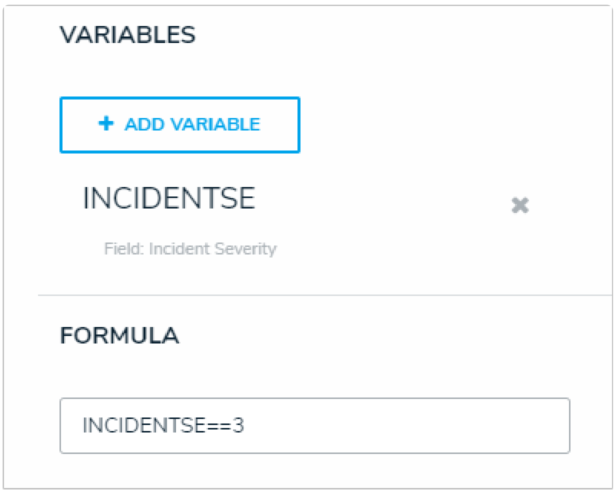
Naming a variable after a function will result in an error.

8. **Optional:** Enter a description for the formula in the **Description** field.
9. **Optional:** Select the **Treat empty values as Null checkbox** if objects with blank variables should not be assigned a zero (0) value. See the Null Values in Formulas article for more information.
10. Click **Create**.
11. Continue adding variables by following steps 5-10 above. To remove a variable, click the icon beside the variable.



An existing variable on a condition.

12. Using the variable name(s), enter a formula, including any operators and/or functions, in the **Formula** field (e.g. **INCIDENTSE==3)**). See the Variables, Operators & Functions article for more information.



Creating a new formula using the variable name.

You must use double equal signs (==) in condition formulas. See the Variables, Operators & Functions article for more information.

13. Click Done.