



Last Modified on 12/11/2024 4:21 pm EST

Create a New State

Overview

States represent the data collection and review stages (e.g. Create, Triage, Review, Investigate, Close, etc.). States allow you to control where an object is created or viewed in an application, required fields that must be completed during certain stages, which state the Object will transition (Triggers) and narrow search results.

A default workflow (**Creation**, **Draft**, **Active**, and **Archived** states) is automatically added to the Object Type when creating an Object Type. These states can be deleted or supplemented with additional States as needed (except for the Creation state, which cannot be deleted and allows only limited configuration).

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to access Object Types.

Related Setup/Information

See the Edit or Delete a State article for more information on marking fields, properties, or roles as required and changing the State's name or color.

See the Add a Trigger & Transition to a State article for more information on adding triggers, transitions, or actions to a state.

Navigation

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



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Home ~	My Tasks		_		
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Administration Icon

2. From the *Admin Overview* screen, click on the **Configurable Forms** tile under the **Views** section.

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	Fields		Data Definitions			v

Configurable Forms Tile

Creating a New State

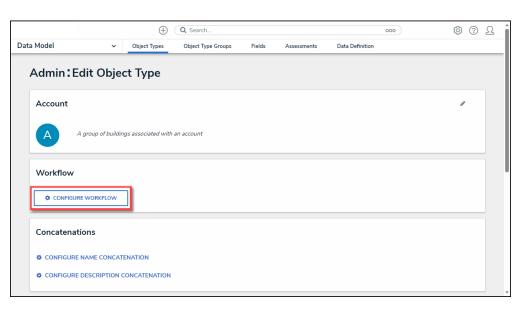
- From the *Admin: Object Types* screen, enter an Object Type Name in the **Search** field to narrow the search results list.
- 2. Click on an **Object Type Name** from the search results lists.

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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition			
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P	Project A list of Projects asso	ociated with an <mark>acc</mark> or	unt						
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Object Type Name Link

3. From the Admin: Edit Object Type screen, click the Configure Workflow button.



Configure Workflow Button

4. From the *Admin: Edit Workflow* screen, click the + Add State button.

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+ Add State Button

5. Enter the **State's Name** in the **Name** field.



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Name Field

6. Select a **Category** from the **State Category** dropdown menu.

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States *Name Request Information Color Color CREATION	* State Category \$elect one ~ Active Archive Complete Draft In Progress	
TRIGGERS + ADD TRIGGER	Not Started	
Create		

State Category Field

 (Optional) Select a Color Code from the Color dropdown pallet or enter a 6-digit hex color code into the Color field.



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Color Field

8. Click the **Create** button to create the new State.

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Create Button

9. The new State will appear at the bottom of the list on the *Admin: Edit Object Type* screen.



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New State

Edit the Workflow Name or Description

Overview

Administrator users can edit a workflows name and description.

User Account Requirements

The user must have Administrator permissions in order to access the *Admin Overview* section.

Navigation

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



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Home	✓ My Tasks			
	My Tasks	≑ sort ∨ Q search		

Administration Icon

2. From the **Administrator Settings** menu, click **Admin Overview**.

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Home	↔ My Tasks		Admin Overview
			 Settings
	My Tasks	\$ SORT Q SEARCH	20 User Management
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Administrator Settings Menu

3. From the *Admin Overview* screen, click the **Object Types** tile under the **Data Model** section.



Admin Overview	~		⊕ Q Search			000	\$\$ (P) \$
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	o Fields	Assessments	Data Definitions				
	People			Application Ma	nagement		
	Q. Users	User Groups	Roles	Org Manager	Applications		

Object Types Tile

 From the *Admin: Object Types* screen, enter a keyword in the **Search** field to narrow the Object Types list.

		⊕ (0	Search			••••	\$ © \$			
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
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Act	Activity									
AT	<mark>Activity</mark> Type									
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L	L Log Single entry of related activity to an Investigation or Case, used for evidentiary purposes, including times and costs.									
T	Task Actionable record for k	ey data objects (Inci	dent, Case, <mark>Activity</mark>) with	user assignm	ent, date tracking ar	ıd email notifications.				
							OBJECT TYPE UNIVERSE			

Search Field

5. Click the **Object Type** you wish to edit or delete.



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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
Admir	1:Object Typ	bes					+ CREATE OBJECT TYPE			
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Act	<mark>Activity</mark>									
AT	<mark>Activity</mark> Type									
F	Finding Results or evidence fro	m a specific audit <mark>ac</mark>	tivity							
L	L Log Single entry of related activity to an Investigation or Case, used for evidentiary purposes, including times and costs.									
T	Task Actionable record for k	ey data objects (Incio	dent, Case, <mark>Activity</mark>) with	user assignm	ent, date tracking an	d email notifications.				
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Object Type Name

Edit the Workflow Name or Description

1. From the *Admin: Edit Object Type* screen, click the **Edit** icon.

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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition	
Admin:Edit C	bjec	t Type					
Activity							
Act							
Workflow Concat	enations						
Workflow							
	KFLOW						

Edit Icon

2. Click on the **Name** field and enter a new name value.



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Data Model	\sim	Object Types	Object Type Groups	Fields	Assessments	Data Definition	
Admin:Edit C	Objec	t Type					
Activity							1
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	A	ctivities					
	Desc	cription					

Name Field

 Click on the **Plural Name** field and enter a new plural name value. The plural name will appear when viewing a list of the objects for that type (e.g. "View Incident<u>s</u>" instead of "View Incident").

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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition	
Admin:Edit O	bjec	t Type					
Activity							-
Act	*Na	me					
Edit	Plura	l Name					
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					10		

Plural Name Field

4. Click on the **Description** field and enter a new description.



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Admin:Edit	Objec	t Type					
Activity							
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Edit		tivity					
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	Desc	ription			_		

Description Field

5. Click on the **Monogram**.

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Admin: Edit	Object Type					
Activity						1
Act	* Name Activity					
Edit	Plural Name					
	Description					
				10		

Monogram

6. From the *Customize Monogram* pop-up, enter a new monogram value in the **Monogram** field.



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Edit	* Monogram								
	* Pick a color #006460)		~					
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Customize Monogram Pop-up

7. Click the **Pick a Color** field and select a new color from the **Color Picker** dropdown menu.

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Color Picker Dropdown

8. Click the **Done** button when you are finished.



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Activity - CC - Detailed Repeatable Form Activity - CC - Details Navigation	Priority: none
Activity - CC - Details Navigation	Priority: none
	Priority: none
Activity - CC - Edit	Priority: none
	Priority: none
Activity - CC - Officer Portal - Requires Review	Priority: none
Activity - CC - Portal - Create	Priority: none
Activity - CC - Read Only	Priority: none
Related Data Definitions	
Activity	
Activity (Activity Type; Business Unit)	
Activity (Involved Organization; Involved Person; Involved Vehicle; Involved Item; Incident)	
Activity, Activity Type	
Activity, Activity Type, Activity, Officer Response, Activity	
Activity, Incident	
	✓ DONE

Done Button

Add a Trigger & Transition to a State

Overview

Timed Triggers automate the Workflow of an object which can transition an object from State to State (e.g., notify users of an overdue date and process imported objects into Workflows). Timed Triggers are scheduled to run at midnight local time.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to create Timed Triggers.



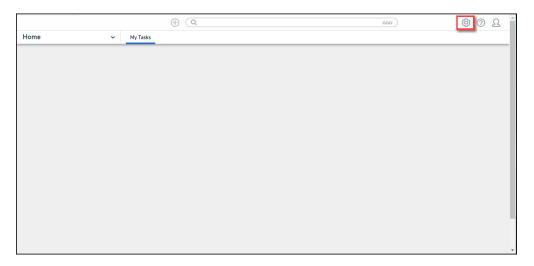
Related Information/Setup

Please follow the link below for more information on Triggers.

- Creating a Date-Based Trigger
- Orchestration Event Action in Resolver Core
- Add a Create Object Action in Resolver Core

Navigation

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



Administration Icon

2. From the *Admin Overview* screen, click on the **Object Types** tile under the **Data Model** section.

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3. From the Admin Object Types screen, enter an Object Type Name in the Search field to



narrow the search results and click on an Object Type.

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Data Mod	lel ~	Object Types	Object Type Groups	Fields	Assessments	Data Definition					
Admi	n:Object Type	es				+ CREATE OBJECT TYPE					
Q Bus	iness Unit					0					
AP	AP Audit Plan A collection of audits for a particular company/business unit and time period.										
Auditable Entity An element of the company that could be audited. This could represent a business unit or legal entity, but could also represent a project, initiative, program, location, process, or a mixture of all of these items.											
00	-	and ownership to	key data objects includin	-		ctionality. Primary organizational Incident Types. Some standard					

Object Type

4. From the *Edit Object* screen, click the **Configure Workflow** button on the *Workflow* section.

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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
Admin:	Edit Object	Гуре								
Business	Unit						and the second se			
BU 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.										
	Workflow									

Configure Workflow Button

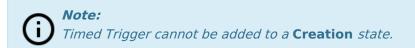
5. If more than one Workflow is set up for the Object Type, click the desired Workflow from the list.



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Citation								Sala	
CT IT: A baseline requirement presented through an authority document or a requirement of an organizations own IT Compliance Framework. VRM: A question posed to the vendor about their information security. privacy and business continuity practices.									
Workflow									
Citation									
VRM - Citation Workflow									
IT Compliance Assessment Citation Workflow									

Multiple Workflows

 From the *Edit Workflow* screen, click the +Add Trigger link under the State you want to add a Trigger.



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States					+ ADD STATE
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ACTIVE	ER tions to Archived				0 REQUIRED COMPONENTS
ARCHIVED TRIGGERS + ADD TRIGGE This State has no Triggers	ER				0 REQUIRED COMPONENTS
					✓ DONE



+Add Trigger Link

Adding a Nightly Trigger to a State

1. From the *Add Triggers* pop-up, select **Timed** from the **Type** field dropdown menu.

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States	Button						
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ARCHIVED							_
TRIGGERS + ADD TRIGGER							- 1
This State has no Triggers							- 1
							- 1
							-

Type Field

- 2. Enter a Trigger Name in the Name field.
- 3. (Optional) Enter a brief description outlining the Nightly Trigger in the Description field.
- 4. **(Optional)** Select a color from the **Color** dropdown menu. The **Color** selected will be applied to the Icon if one is selected.



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Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definition	1			
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ACTIVE	Color							~	l
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ARCHIVED TRIGGERS + ADD TRIGGER This State has no Triggers	PALETTE								



5. **(Optional)** Select an icon from the **Icon** dropdown menu. The **Icon** represents the Trigger within the system and appears just before the Trigger Name on the corresponding screens.



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Icon Dropdown

6. Select **Nightly** from the **Frequency** field dropdown menu.



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Archive	Frequency	3							
	Nightly							~	
ARCHIVED	Nightly								
TRIGGERS + ADD TRIGGER	Scheduled								
This State has no Triggers									l
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									*

Frequency Field

7. Click the **Create** button to create the Nightly Trigger.

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Business Unit Status	ADD TRI	GGER						×	
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States	Name								
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	Nightly						`	~	
ARCHIVED TRIGGERS + ADD TRIGGER					CANCEL	✓ CR	EATE		
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Create Button



Note:

The Nightly Trigger will appear on the **Admin Edit Workflow** screen with a **Clock** icon indicating that the Triggers is a Nightly Trigger.

TRIGGERS + ADD TRIGGER	0 REQUIRED COMPONENTS
Archive	
② 😭 State Move ≓ Transitions to Archived	
O State Move	

Adding a Transition to a State

 The *Edit Trigger* pop-up will appear when you click the **Create** button to create the Trigger.

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Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definition		
States		GGER			· · ·		×
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TRIGGERS + ADD TRIGG	SER	State moves from Act	ive to Archiv	ed			
Create ≓ Transit	tions 1 TRANSITION	NS					
ACTIVE	+ ADD TRAM	NSITION					
TRIGGERS + ADD TRIGG	SER						
Archive	sitions						
🛛 😧 State Move	т						
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Edit Trigger Pop-up

2. Click the **+Add Transition** link under the *Transition* section.



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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition	n			
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ACTIVE		+ ADD TRAN	SITION							I
7 TRIGGER	S + ADD TRIGGE	R								
Ar	r chive ≓ Transiti	ions								
•	State Move	Т								•

+Add Transition Link

- 3. Enter a Transition name in the **Name** field.
- Select a state from the **Destination State** dropdown menu, indicating the State the Object Type will move to when the Transition is executed.

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Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definitio	'n			
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CREATION	GGER	State Move State moves from Act	ive to Archived	d			CHIN .		
Create ≓ Tran	TRANSITION	45							-
ACTIVE	GGER	n from Active to Archive							
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O 🔂 State Mov	re T • Active	d			CANCEL				
ARCHIVED					vouvel				
TRIGGERS + ADD TRI	GGER								

Destination State Dropdown

 (Optional) Select the Bypass Required Fields toggle switch to allow the Transition to move the Object Type to the indicated State if there are empty required fields on the Object Type Form.



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Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definitio	'n		
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O State Move	т 🔳 🗶 Ву	pass Required Fields.	9					
·	-				CANCEL	✓ CI	REATE	
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Bypass Required Fields

6. Click the **Create** button to create the Transition.

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	Object Types	Object Type Groups	Fields	Assessments	Data Definition			
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Create Button

Add a Condition to a Transition

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

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.

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Home ~	My Tasks		-



Administration Icon

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

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Home v My Tasks		Admin Overview	
		Settings	
		20 User Management	
		Branding	
		Languages	

Admin: Overview Link

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

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Data Model		_	Views	
Object Types		Object Type Groups	Configurable Forms	Data Visualizations
e Helds	Assessments	Data Definitions		
People			Application Management	
Q. Users	User Groups	Roles	Org Manager Applications	

Object Types Tile

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

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Data Mod	el ~	Object Types	Object Type Groups	Fields	Assessments	Data Definiti	on	
Admin:	Object Types					+ CREA	TE OBJECT TY	'PE
Q Con	trol							8
BU	Business Unit A segment or subset of th hierarchy providing secur reports are anchored at th	ity and ownership to	key data objects includin					
С	Certification Statements signed off on	by business users to	o certify on the effectivene	ess of <mark>control</mark> e	s.			
C	Control The method an organizat can be of administrative,	-	risk, including policies, pro ent or legal nature.	cedures, guid	delines, practices, or	r organization str	ucture, which	ı
М	Market Alternate organizational I Types, most often used w				-			ent
R	Region Alternate organizational I Types, most often used w		ecurity and ownership to n use cases. Includes link		-			ent
R	Request VRM: A request allows m internal audit/ <mark>control</mark> s tea testing.							
1	Test A method used to test th	e operating and desi	gn effectiveness of a <mark>cont</mark>	<mark>rol</mark> , which ma	y include various te	sting methods or	strategies.	
					N V	IEW OBJECT TY	PE UNIVERS	SE

Click the Object Type's Name

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



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C The method an organiz. can be of administrative		e risk, including policies, p nent or legal nature.	rocedures, gu	idelines, practices,	or organization	structure,	which	1
Workflow								
Internal Audit Project - Co	ntrol Workflo	w						
Control Self-Assessment	Workflow (Risk	« & Compliance)						
Control Status								
IT Compliance Assessmen	It Control Work	cflow						
Internal Controls Assessm	ent - Control V	Vorkflow						
Compliance Testing Work	flow <mark>(</mark> Prototype	e)						
IT Risk Assessment Contr	ol Workflow							

Click on a Workflow

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

Configure Workflow Button

8. 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 <i>transition.

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Send Back to In Pr	ogress ≓ Transitio	ns to In Progress						
ARCHIVE TRIGGERS + ADD TRIGC This State has no Triggers	SER				0 REQUIRE	ED COMPON	ENTS	
						v	DON	E

Click on a Trigger

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



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Data Model	✓ Object Types Object Type Groups Fields As	sessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
	Internal Audit Project - Control Workflow	Create	ø
	States	TRANSITIONS	
	States	Create	o; x
		+ ADD TRANSITION	
	TRIGGERS + ADD TRIGGER		
	Create # Transitions to In Progress		
	IN PROGRESS		

Click the Edit Icon

Adding a Condition on a Transition

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

	(Q Search	•••	\$ \$ \$
Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
	Internal Audit Project - Control Workflow	Create	1
		TRANSITION DETAILS	
	States	Name	
		Create	
	CREATION	Destination State	
	TRIGGERS + ADD TRIGGER	In Progress	~
	Create = Transitions to In Progress	Bypass Required Fields. 0	
	IN PROGRESS	CONDITIONS	
	TRIGGERS + ADD TRIGGER	+ ADD CONDITION	
	Complete = Transitions to Complete		*

+ Add Conditions Button

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



	(Q Search	•••	\$ @ L
Data Model	✓ Object Types Object Type Groups Fields Ast	sessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
	Internal Audit Project - Control Workflow	CONDITIONS	
	States	* Name Default Condition Formula	
	CREATION	Description	
	TRIGGERS + ADD TRIGGER		I
	Create		6
	IN PROGRESS	VARIABLES	
	TRIGGERS + ADD TRIGGER	+ ADD VARIABLE	
	Complete = Transitions to Complete		*

Name Field

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

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	Internal Audit Project - Control Workflow	DETAILS	
		* Name	
	States	Default Condition Formula	
CREATION TRIGGERS + ADD TRIGGER Create =: Transitions to in Progress		Description	
	IN PROGRESS TRIGGERS + ADD TRISGER	VARIABLES	

Description Field

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

	Q Search		\$\$ @ L
Data Model	✓ Object Types Object Type Groups Fields A	ssessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
	Internal Audit Project - Control Workflow	CONDITIONS	<u></u>
		DETAILS	
	States	*Name Default Condition Formula	
		Description	
	TRIGGERS + ADD TRIGGER		
	Create # Transitions to In Progress		
	IN PROGRESS	VARIABLES	
	TRIGGERS + ADD TRIGGER	+ ADD VARIABLE	
	Complete		

+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.

	(Q Search	•••	\$ @ L
Data Model	✓ Object Types Object Type Groups Fields A	Assessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
		VARIABLES	Î
	Internal Audit Project - Control Workflow	* Variable Type * Available Components	
		Field ~ Select one	~
	States	*Name 🛛	
	CREATION TRIGGERS + ADD TRIGGER Create # Transitions to in Progress	Description Treat empty values as Null CANCEL	REATE
	IN PROGRESS		

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.

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Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition	
۵	Admin:Edit Workflow	EDIT TRIGGER	×
	Internal Audit Project - Control Workflow	VARIABLES * Variable Type * Relationship Relationship Select one	~
States CREATION † TRIGGERS + ADD TRIGGER		*Available Components Select one	~
		Sub Type Array *Name @	~
	Create = Transitions to In Progress		
	IN PROGRESS	Description	
	7 Inducers + ADD Inducert Complete = Transitions to Complete	Treat empty values as Null	✓ CREATE

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.



	() Q Search	•••	\$ \$ \$
Data Model	✓ Object Types Object Type Groups Fields As	sessments Data Definition	
	Admin:Edit Workflow		×
	Internal Audit Project - Control Workflow	VARIABLES	
		*Variable Type *Reference Reference × Select one	~
	States	* Available Components Select one	~
	CREATION	Sub Type Array	
	TRIGGERS + ADD TRIGGER	*Name 🕢	
	Create # Transitions to In Progress	Description	
	IN PROGRESS		
	TRIGGERS + ADD TRIGGER	Treat empty values as Null	
	Complete	CANCEL	✓ CREATE

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**.

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Data Model	✓ Object Types Object Type Groups Fields A:	ussessments Data Definition	
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	Internal Audit Project - Control Workflow	VARIABLES	Î
		*Variable Type *Property Property V Select one	~
	States	*Name 🛛	
CREATION		Description	
	7 TRIGGERS + ADD TRIGGER		
	Create == Transitions to In Progress	Treat empty values as Null CANCEL	CREATE
	IN PROGRESS		

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.





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Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition
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	States	*Name TYPEOFCONT
	CREATION TRIGGERS + ADD TRIGGER	Description
	Create	Treat empty values as Null CANCEL
	IN PROGRESS	

Variable Name

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

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	Internal Audit Project - Control Workflow	VARIABLES * Variable Type * Available Components Field Control Type	~
	States	* Name 🖗 TYPEOFCONT	
	CREATION	Description	
	TRIGGERS + ADD TRIGGER		
	Create = Transitions to In Progress	Treat empty values as Null	CREATE
	IN PROGRESS		

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.

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	Internal Audit Project - Control Workflow	VARIABLES	*
		*Variable Type *Available Components	~
	States	Field Control Type *Name TypEOFCONT	
	CREATION	Description	
	TRIGGERS + ADD TRIGGER Create =: Transitions to In Progress	Treat empty values as Null	
	IN PROGRESS	CANCEL CREATE	

Treat Empty Value as Null Checkbox

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



	(Q Search	<u></u> ۵ ۵
Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition
	Admin: Edit Workflow	EDIT TRIGGER ×
	Internal Audit Project - Control Workflow	VARIABLES *Variable Type *Available Components Field Control Type
States		*Name @ TYPEOFCONT
	CREATION TRIGGERS + ADD TRISGER	Description
Create == Transitions to in Progress		Treat empty values as Null CANCEL CARCEL CREATE
	IN PROGRESS	

Create Button

- 11. Repeat steps 7 16 to add additional variables.
- 12. Click the \mathbf{x} icon next to the variable to delete the variable.

	(Q Search	··· Ø	Q 2
Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition	
	Admin: Edit Workflow	EDIT TRIGGER	
		* Variable Type	*
	Internal Audit Project - Control Workflow	Select one V	
		*Name 🛛	
	States	Description	
		Treat empty values as Null	
	TRIGGERS + ADD TRIGGER	CANCEL 🗸 CREATE	1
	Create == Transitions to In Progress	TYPEOFCONT	
	IN PROGRESS	Field: Control Type Treat empty values as null: false	v

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.

	(Q s)	earch	•••	\$ @ L
Data Model	✓ Object Types Object Type Grou	s Fields Assessments	Data Definition	
	Admin:Edit Workflow		GGER	×
Internal Audit Project - Control Workflow		W	FORMULA	
	States		PEOFCONT	
	CREATION	SA	VE FORMULA	
	TRIGGERS + ADD TRIGGER			DELETE
	Create = Transitions to In Progress			U DELETE

Insert Variable Button

 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.**

	⊕ Q Search	•••	\$ @ L
Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
Internal Au States	Internal Audit Project - Control Workflow	FORMULA INSERT VARIABLE TYPEOFCONT*TYPEOFCONT Your formula is not saved.	2
	States		
	CREATION	SAVE FORMULA	
	TRIGGERS + ADD TRIGGER Create at Transitions to In Progress		DELETE

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.

	Q Search		\$ @ L
Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
	Internal Audit Project - Control Workflow	FORMULA	
		INSERT VARIABLE V	2
	States	TYPEOFCONT*TYPEOFCONT Formula syntax is correct. Formula saved.	
	CREATION	SAVE FORMULA	
	TRIGGERS + ADD TRIGGER		🛱 DELETE
	Create == Transitions to In Progress		

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.



	Q Search		\$ \$ \$
Data Model	✓ Object Types Object Type Groups Fields	Assessments Data Definition	
	Admin:Edit Workflow	EDIT TRIGGER	×
	Internal Audit Project - Control Workflow	FORMULA	
		INSERT VARIABLE ~	2
	States	түреоғсонттүреоғсонта Error: Syntax error in part "@" (char 22). Your formula is not saved.	
	CREATION	SAVE FORMULA	
	TRIGGERS + ADD TRIGGER		
	Create # Transitions to In Progress		DELETE

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.