Workflows

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.

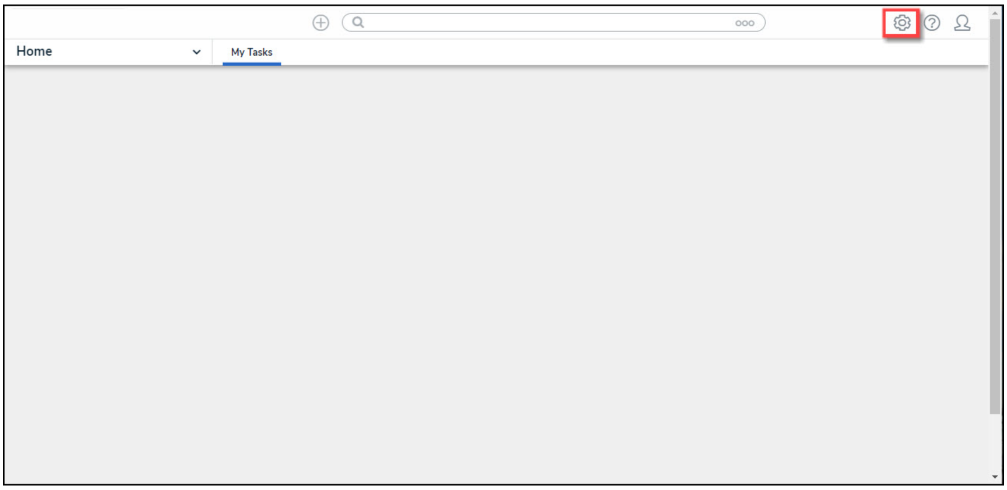
Related Setup/Information

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.

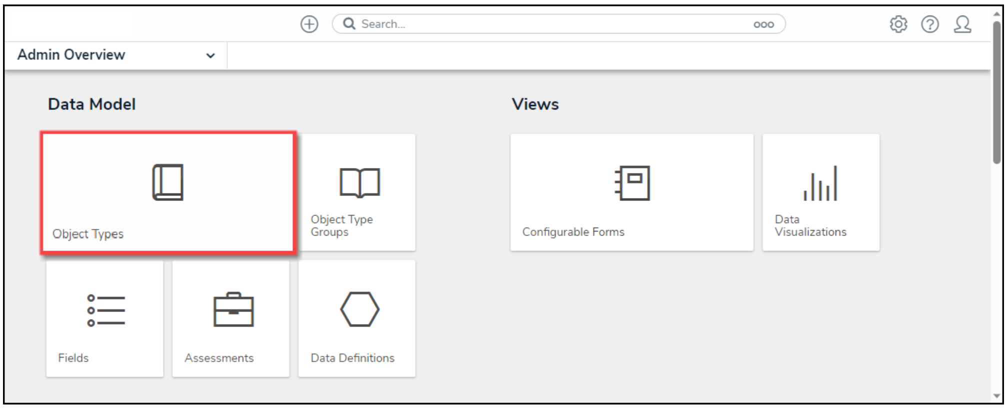
Navigation

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



Administration Icon

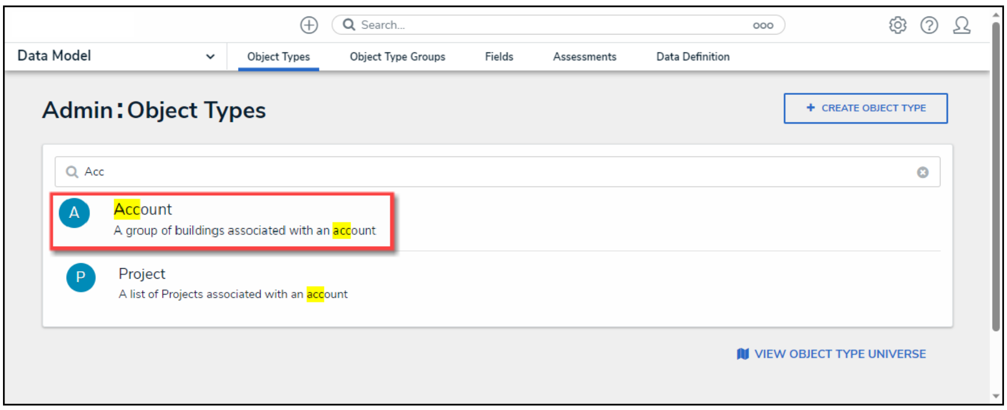
2. From the ***Admin Overview*** screen, click on the **Configurable Forms** tile under the **Views** section.



Configurable Forms Tile

Creating a New State

1. 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.



Resolver.
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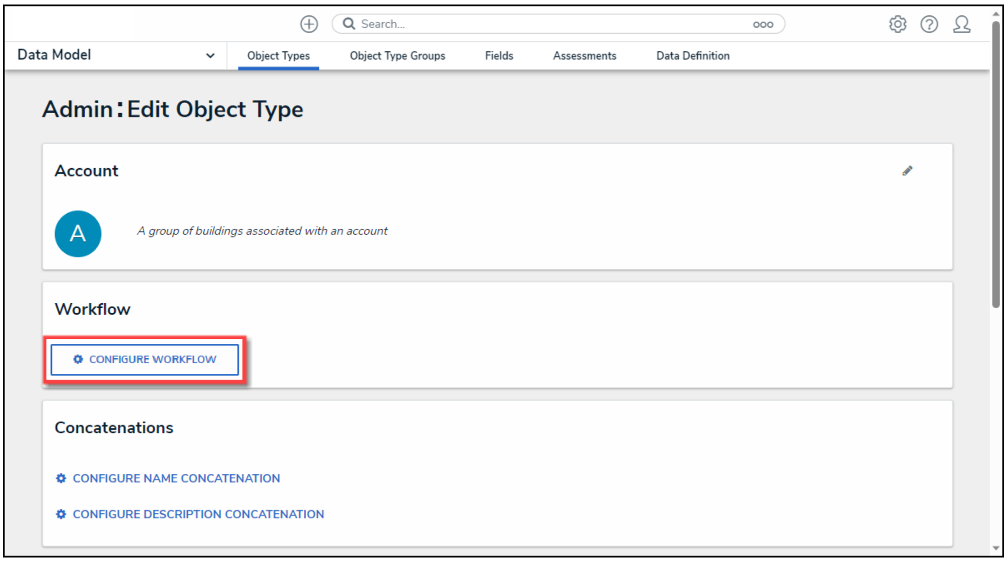
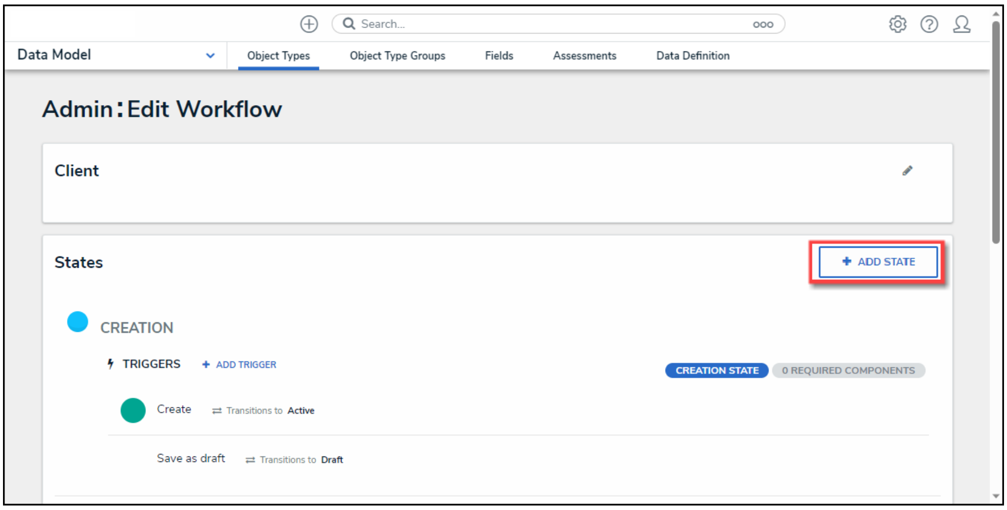
Object Type Name Link

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



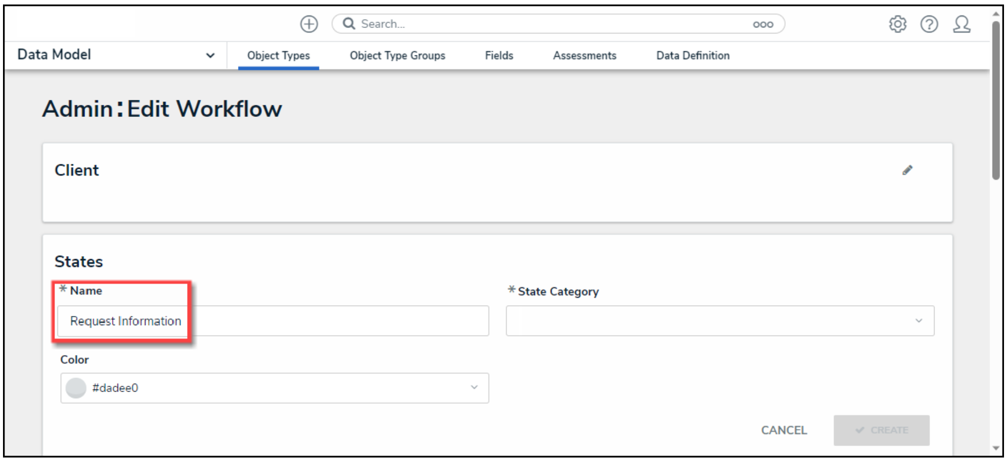
Configure Workflow Button

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



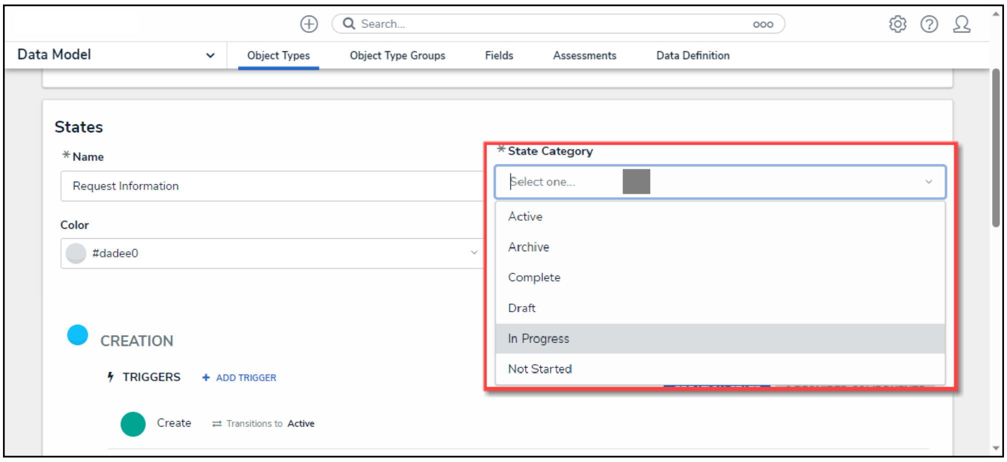
+ Add State Button

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



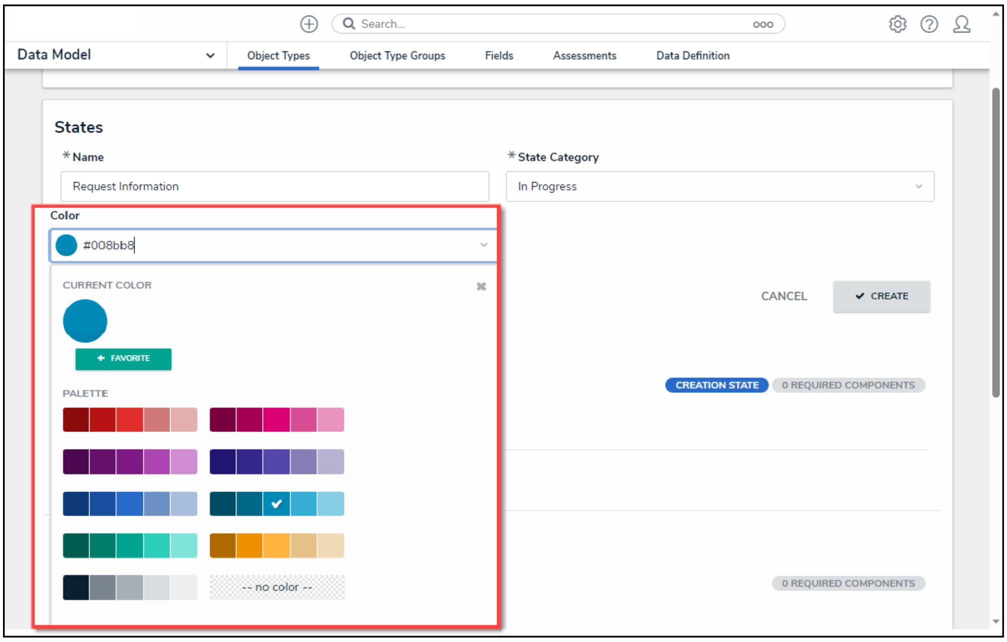
Name Field

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



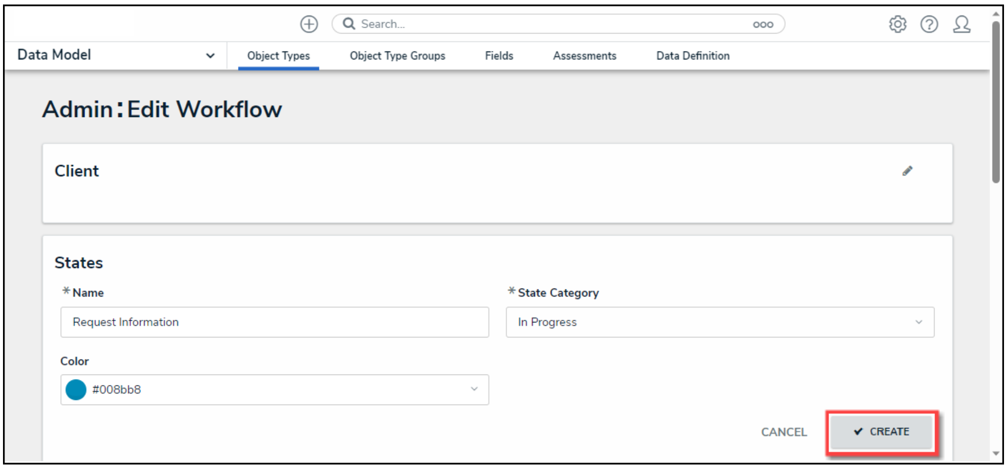
State Category Field

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



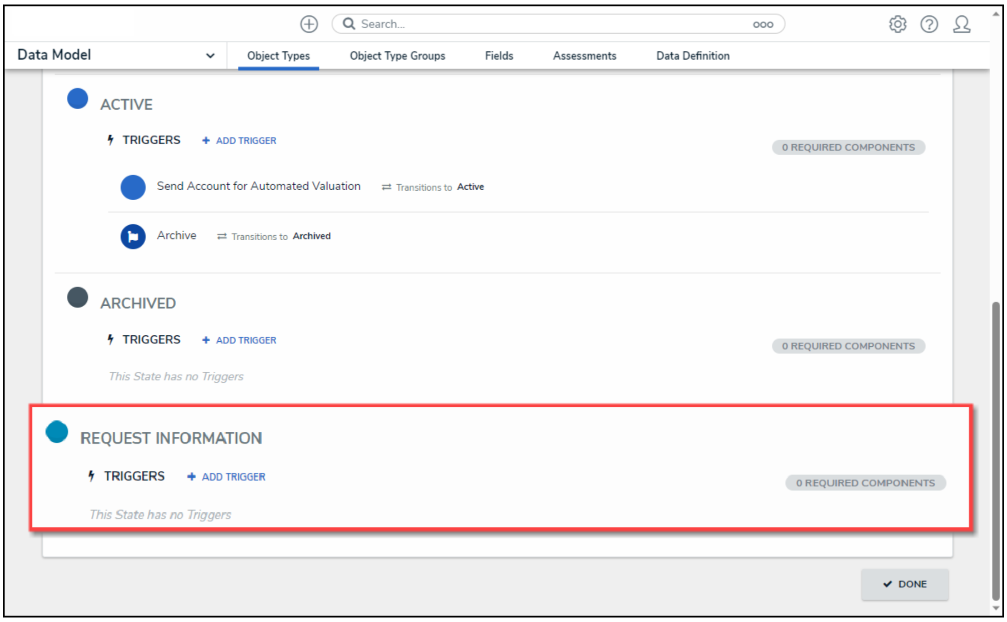
Color Field

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



Create Button

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



New State

Edit the Workflow Name or Description

Overview

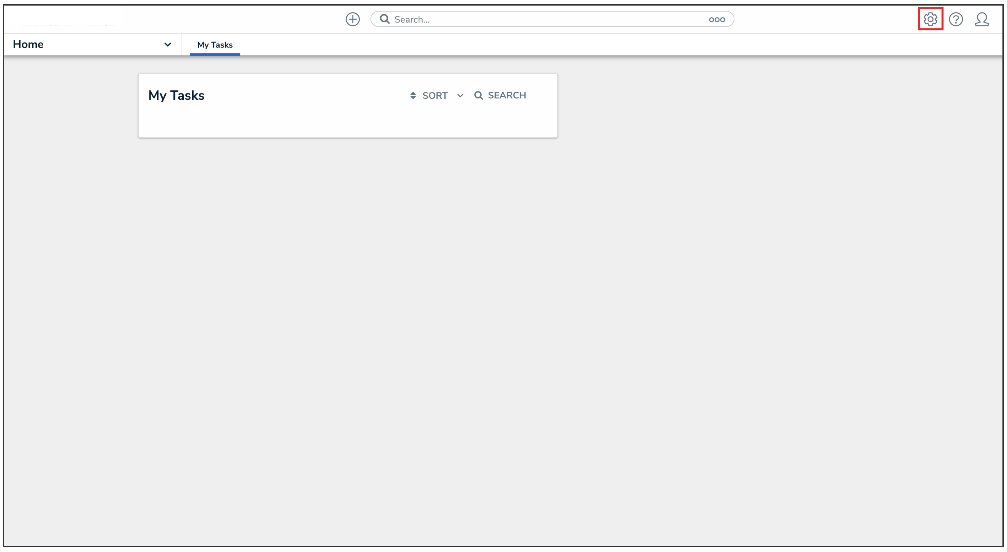
Administrator users can edit a workflows name and description.

User Account Requirements

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

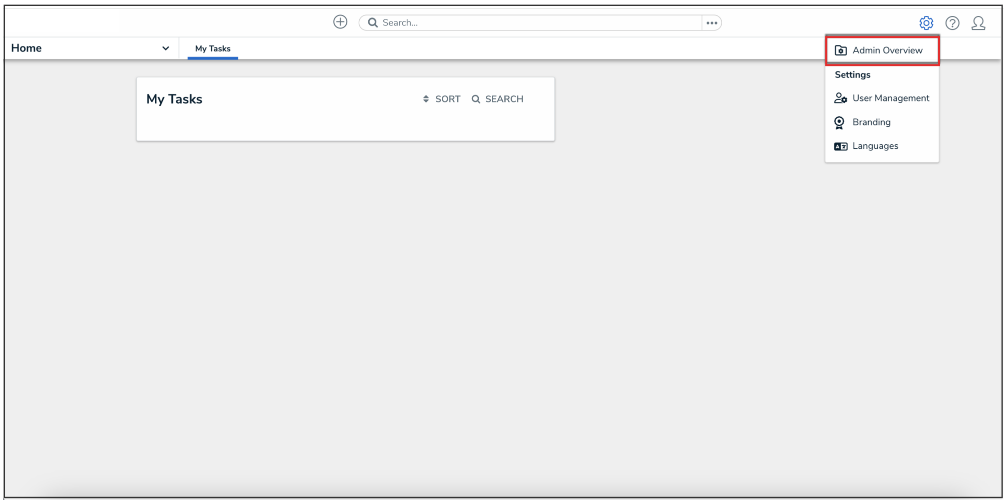
Navigation

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



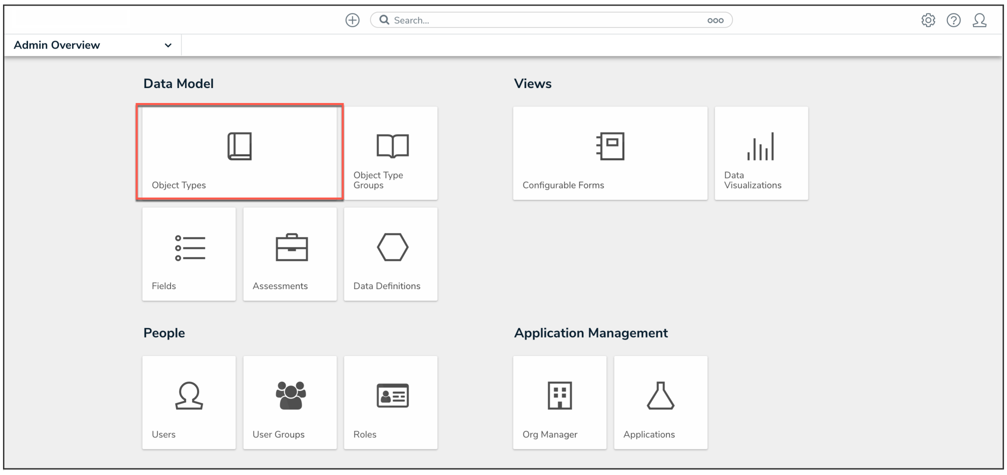
Administration Icon

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



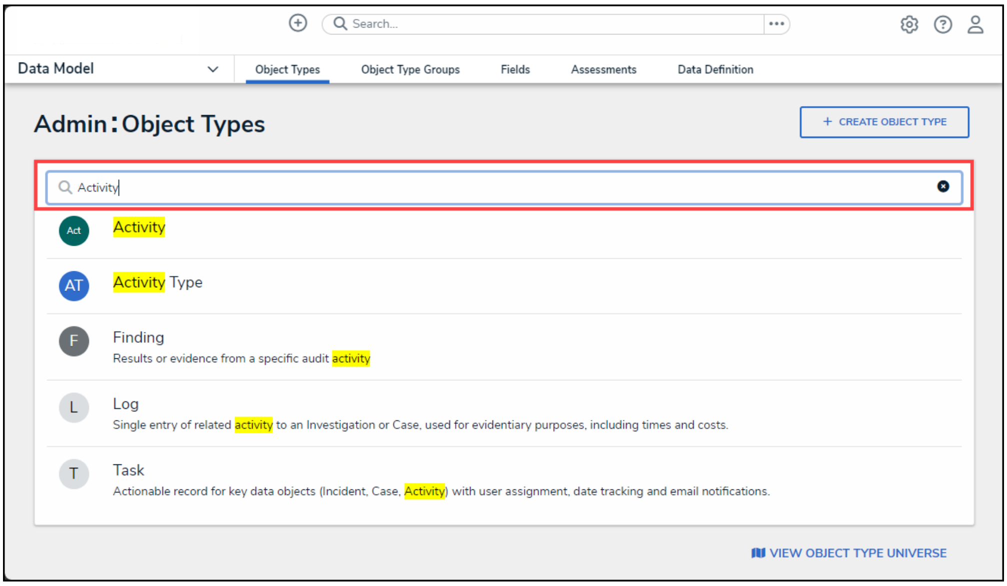
Administrator Settings Menu

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



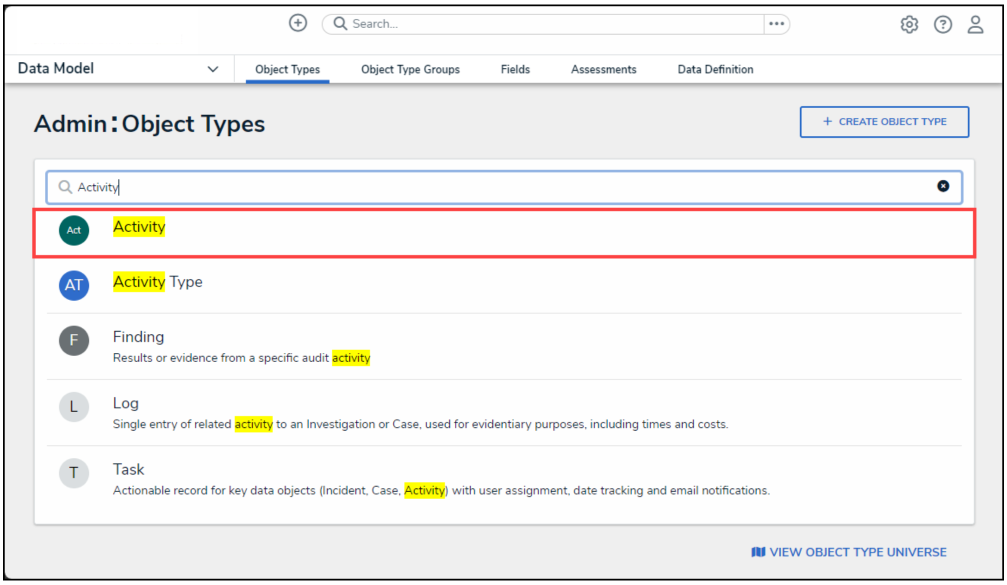
Object Types Tile

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



Search Field

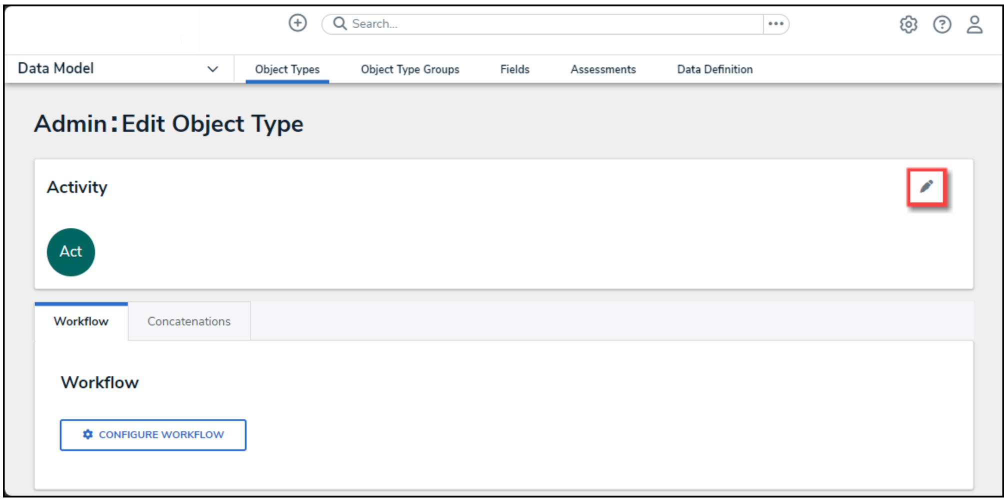
5. Click the **Object Type** you wish to edit or delete.



Object Type Name

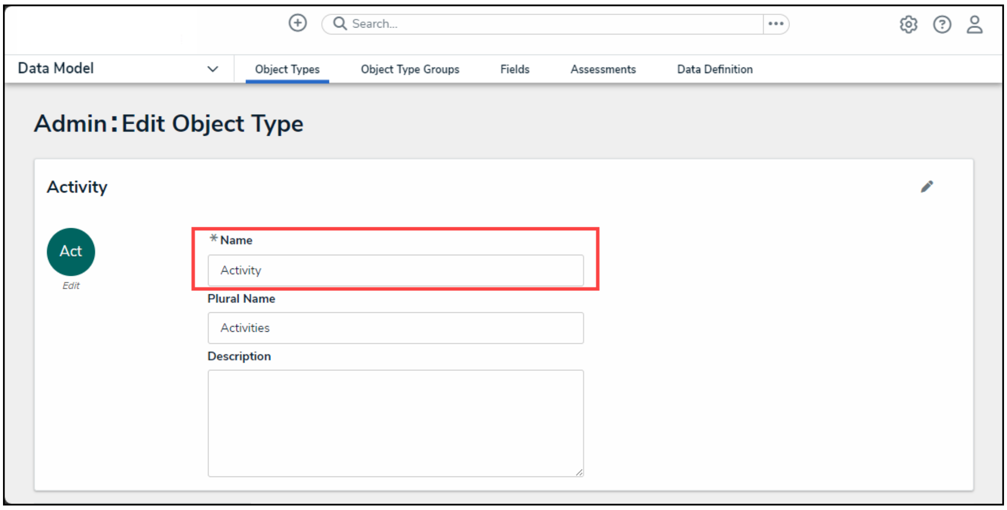
Edit the Workflow Name or Description

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



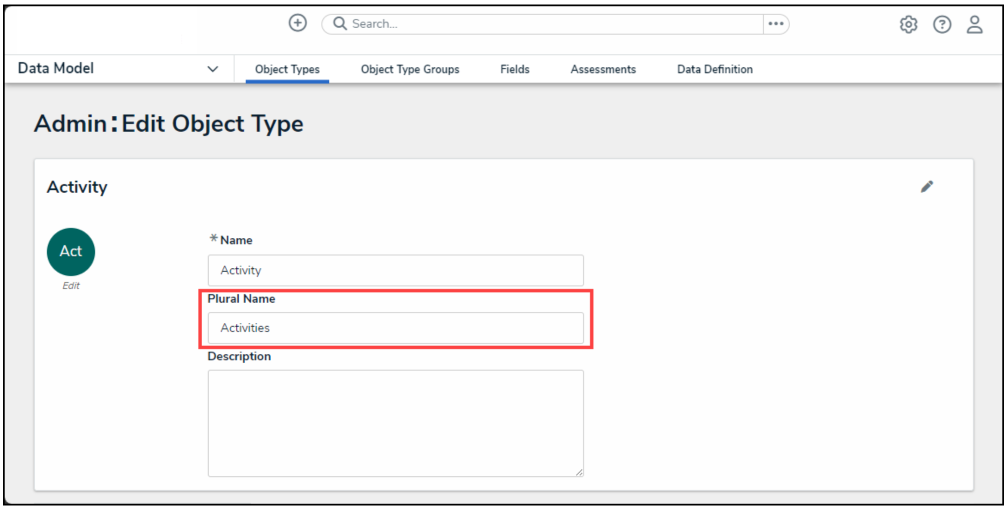
Edit Icon

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



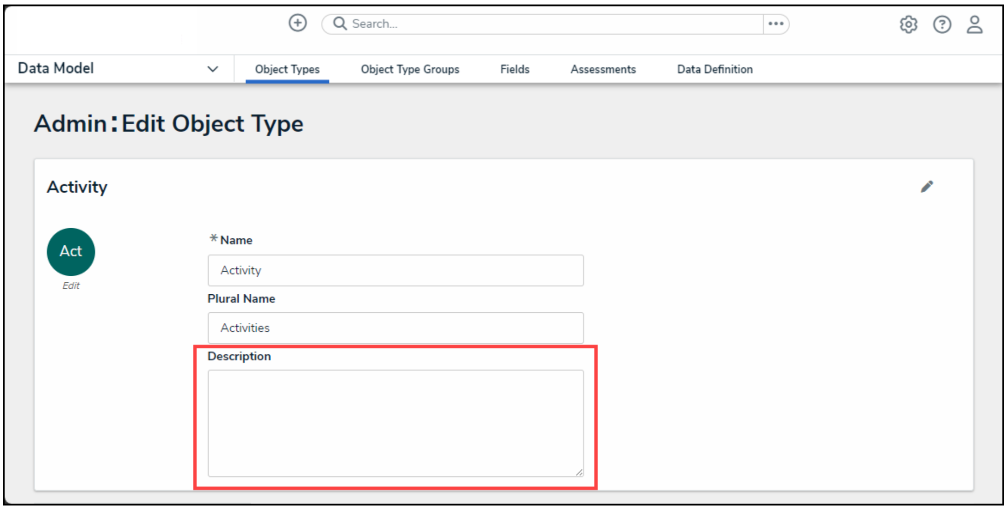
Name Field

3. 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**s**" instead of "View Incident").



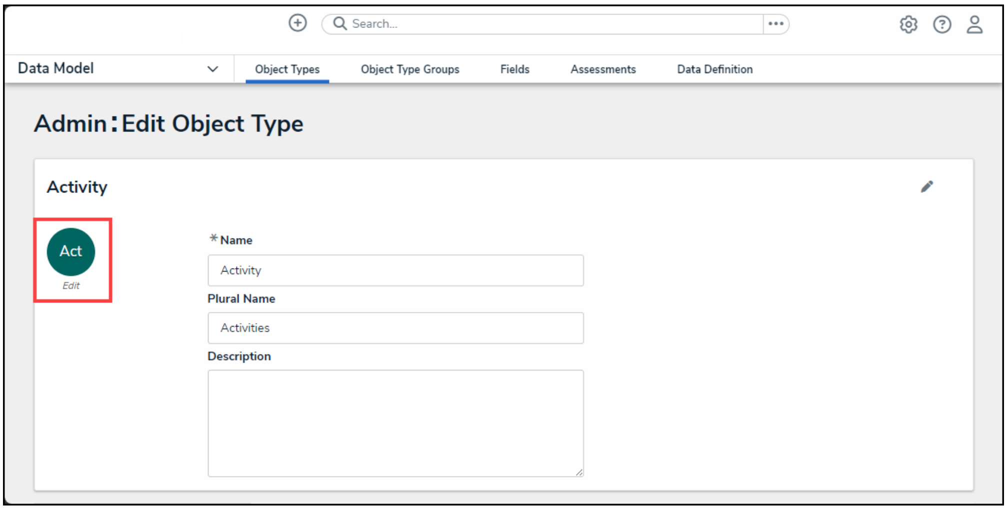
Plural Name Field

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



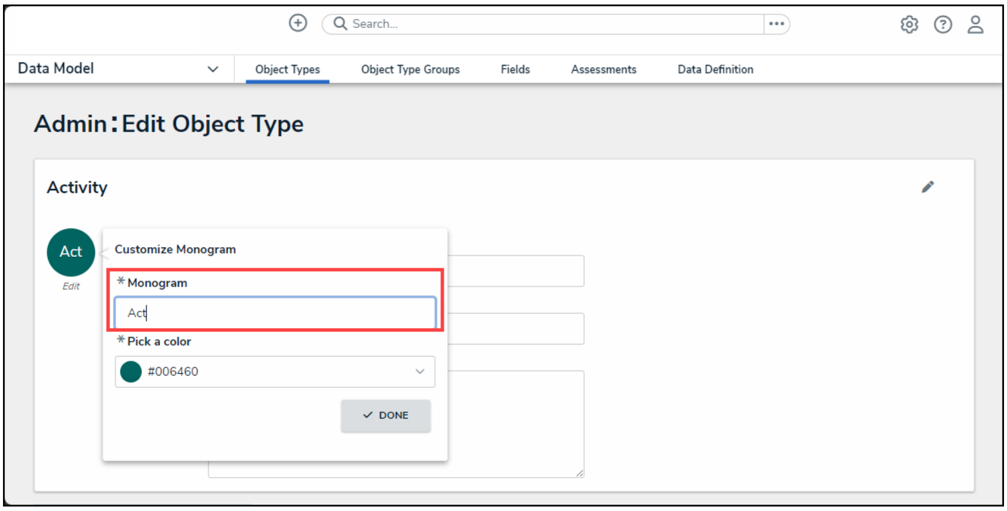
Description Field

5. Click on the **Monogram**.



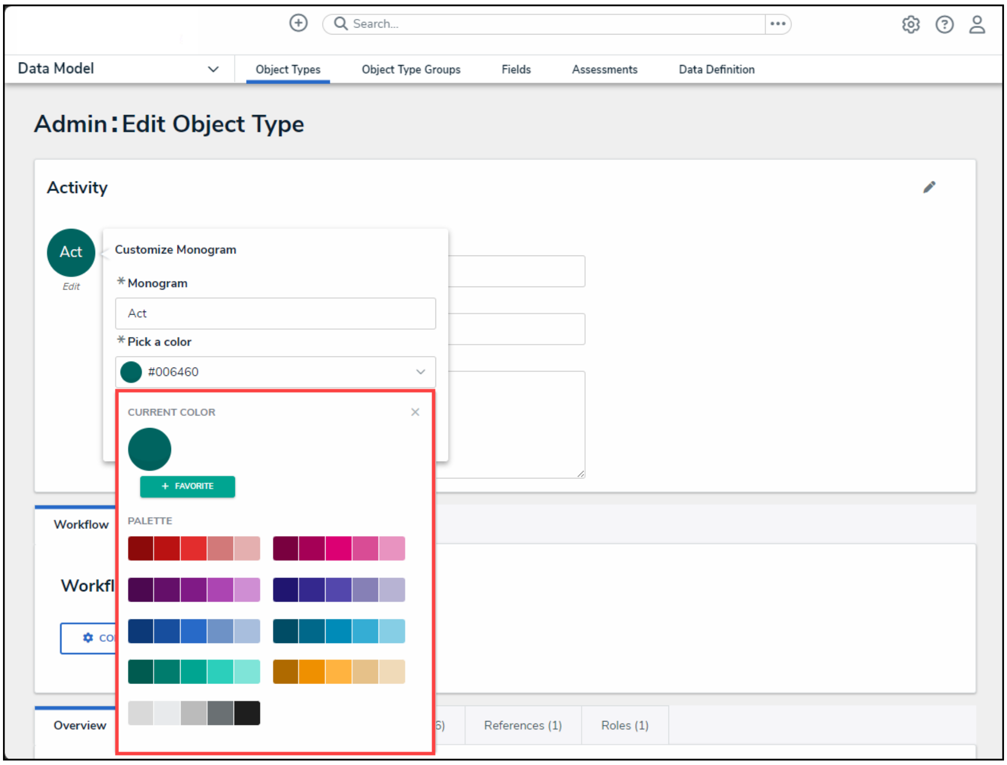
Monogram

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



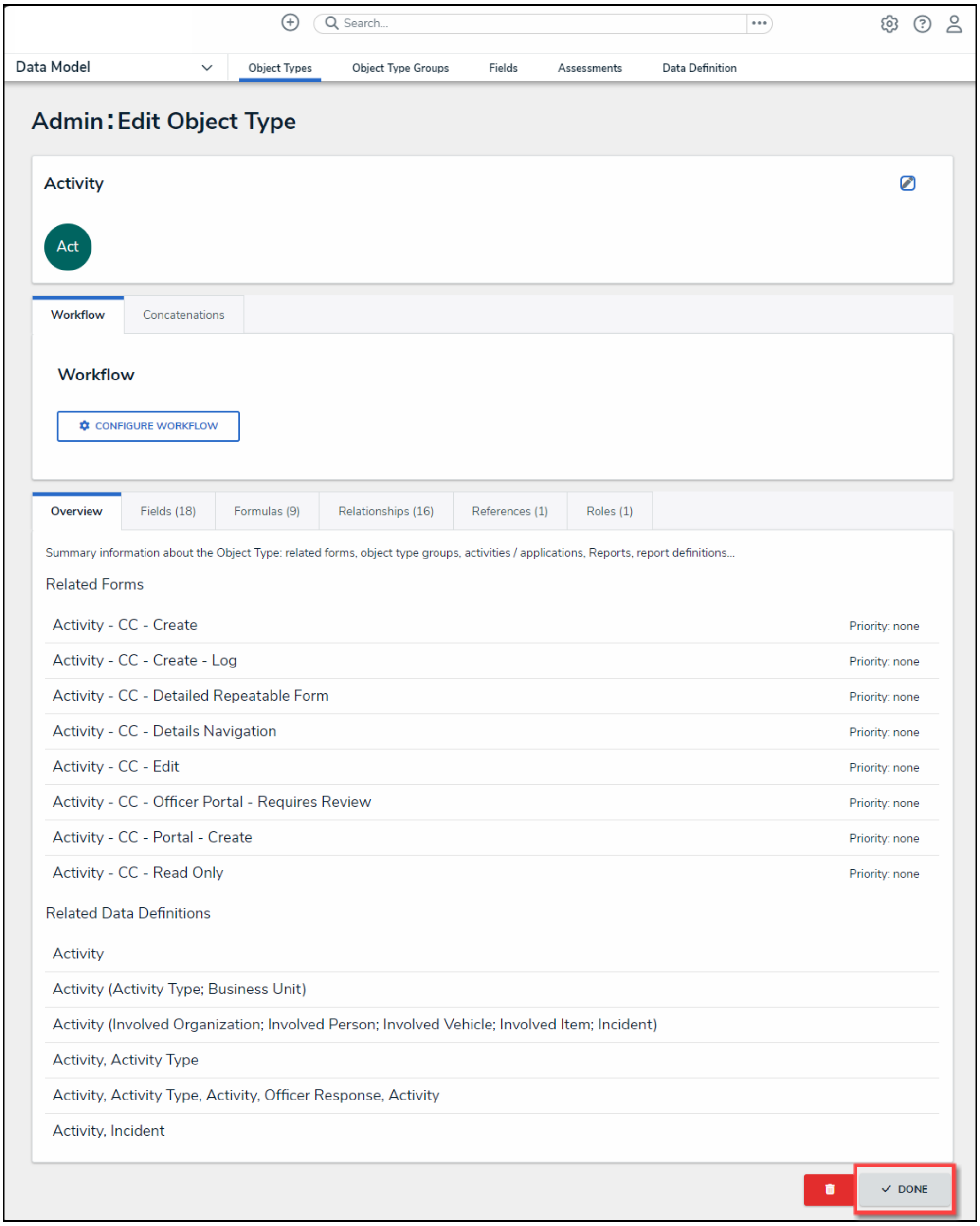
Customize Monogram Pop-up

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



Color Picker Dropdown

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



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.

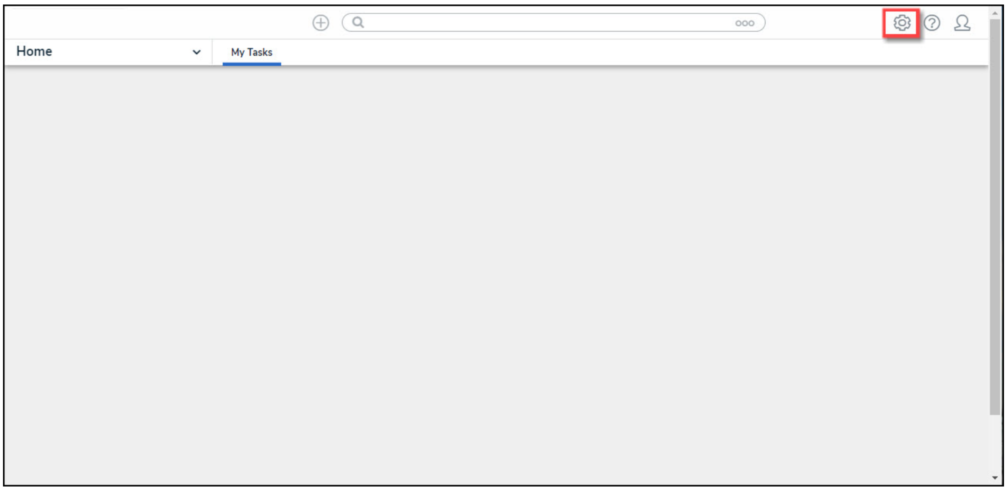
Related Information/Setup

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

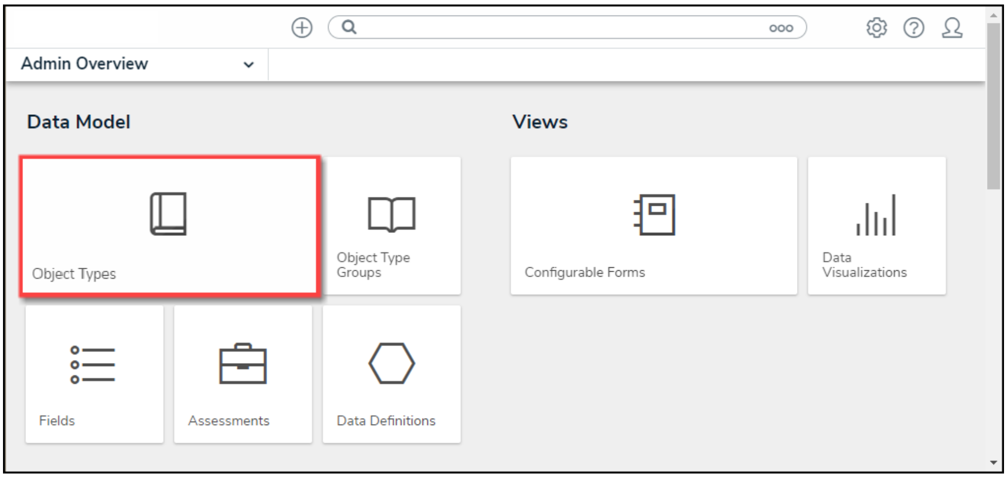
Navigation

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



Administration Icon

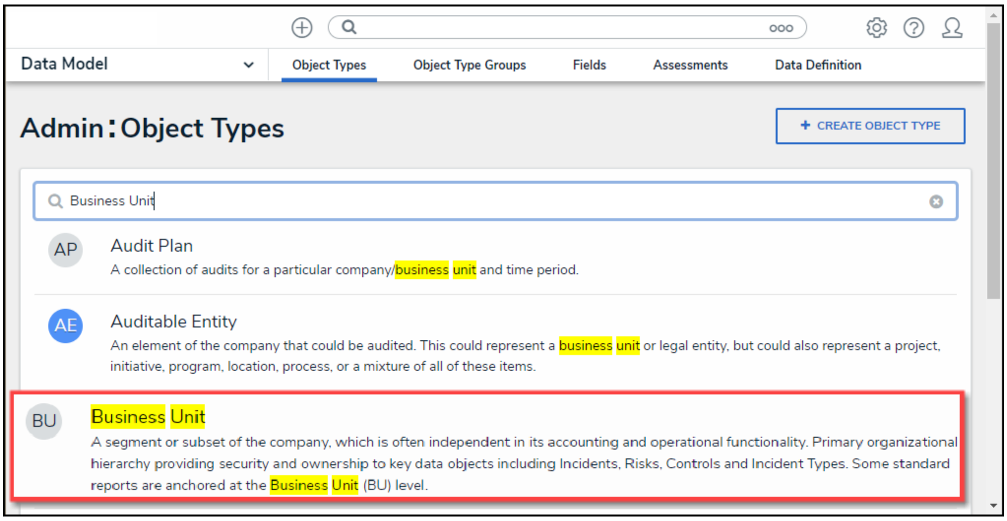
2. From the ***Admin Overview*** screen, click on the **Object Types** tile under the **Data Model** section.



Dashboard Data Sets Tile

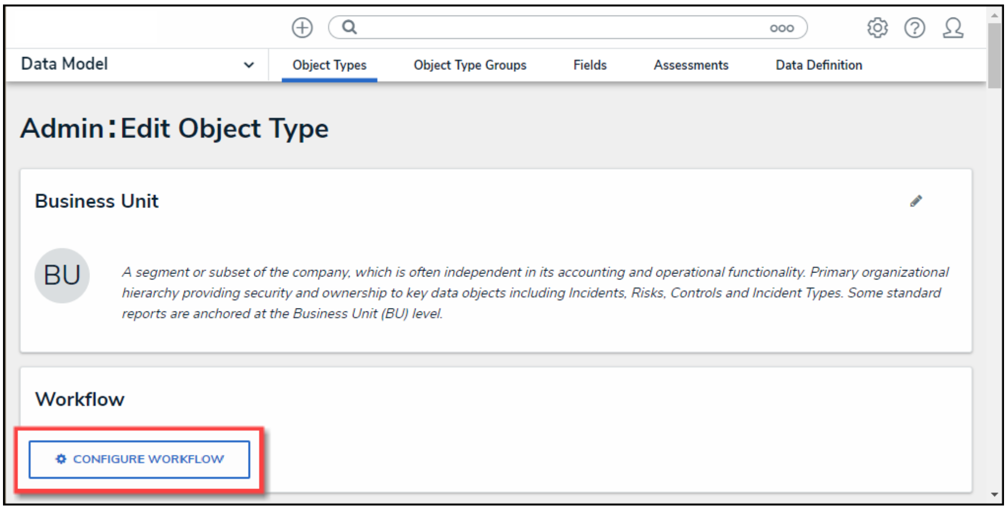
3. From the ***Admin Object Types*** screen, enter an Object Type Name in the **Search** field to

narrow the search results and click on an Object Type.



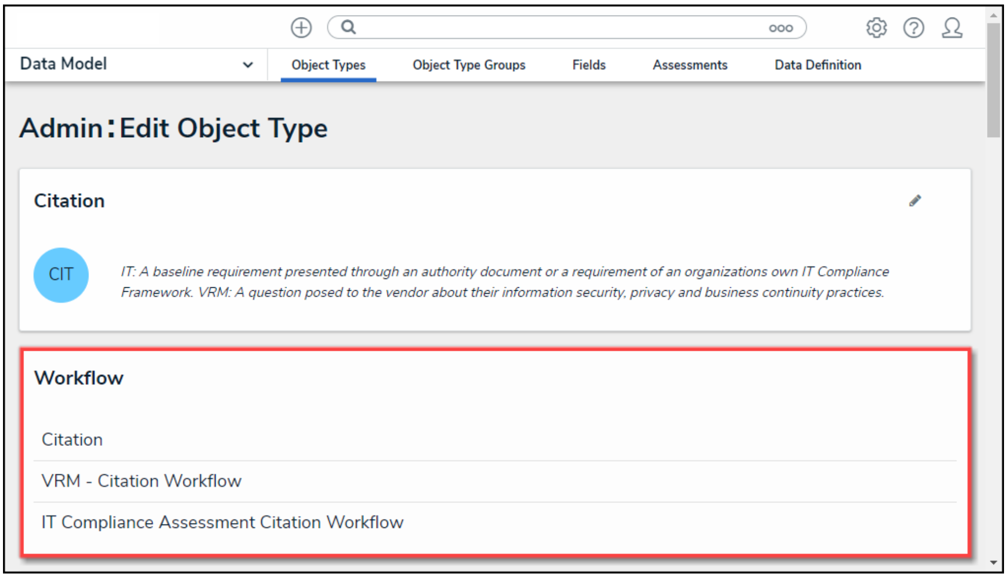
Object Type

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



Configure Workflow Button

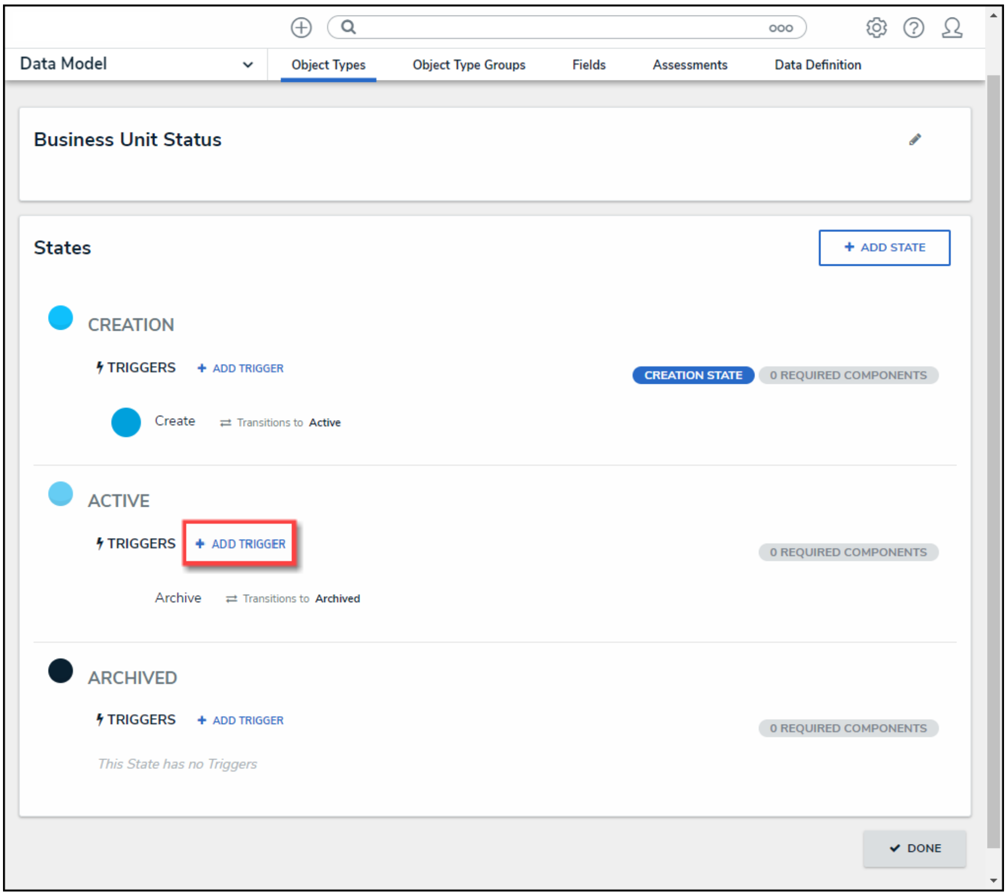
5. If more than one Workflow is set up for the Object Type, click the desired Workflow from the list.



Multiple Workflows

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

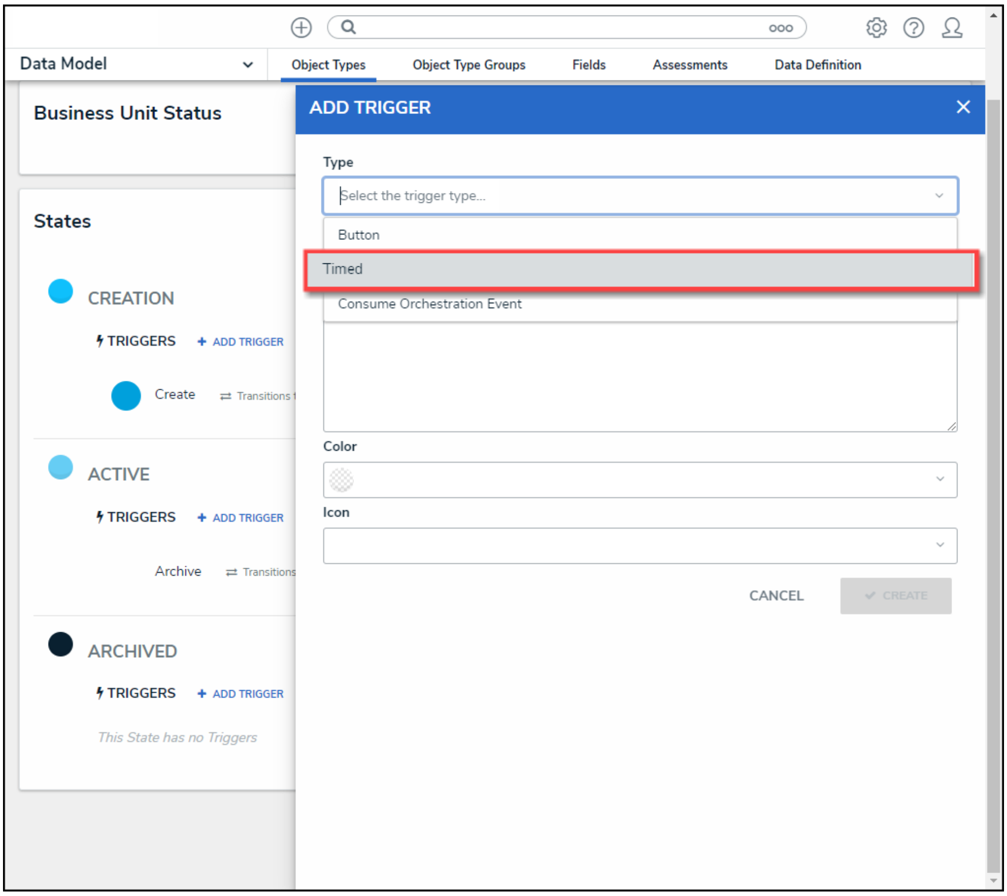
> **Note:**
> *Timed Trigger cannot be added to a* **Creation** *state.*



+Add Trigger Link

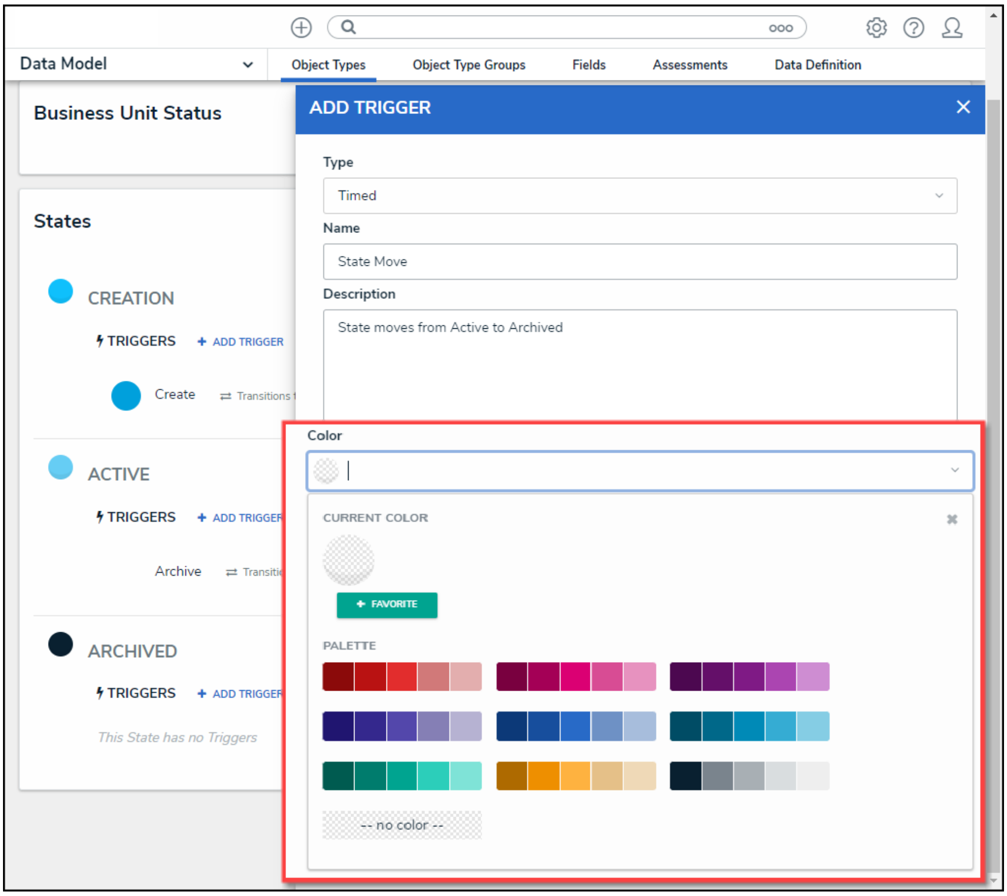
Adding a Nightly Trigger to a State

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



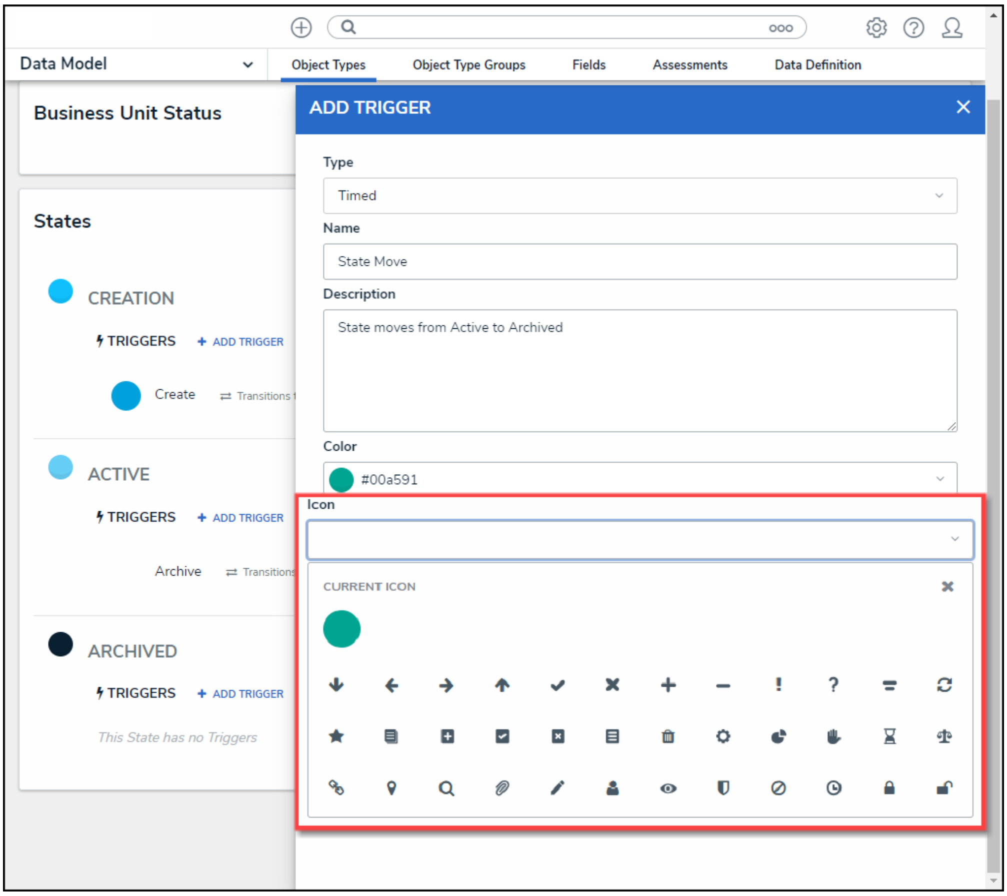
Type Field

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.



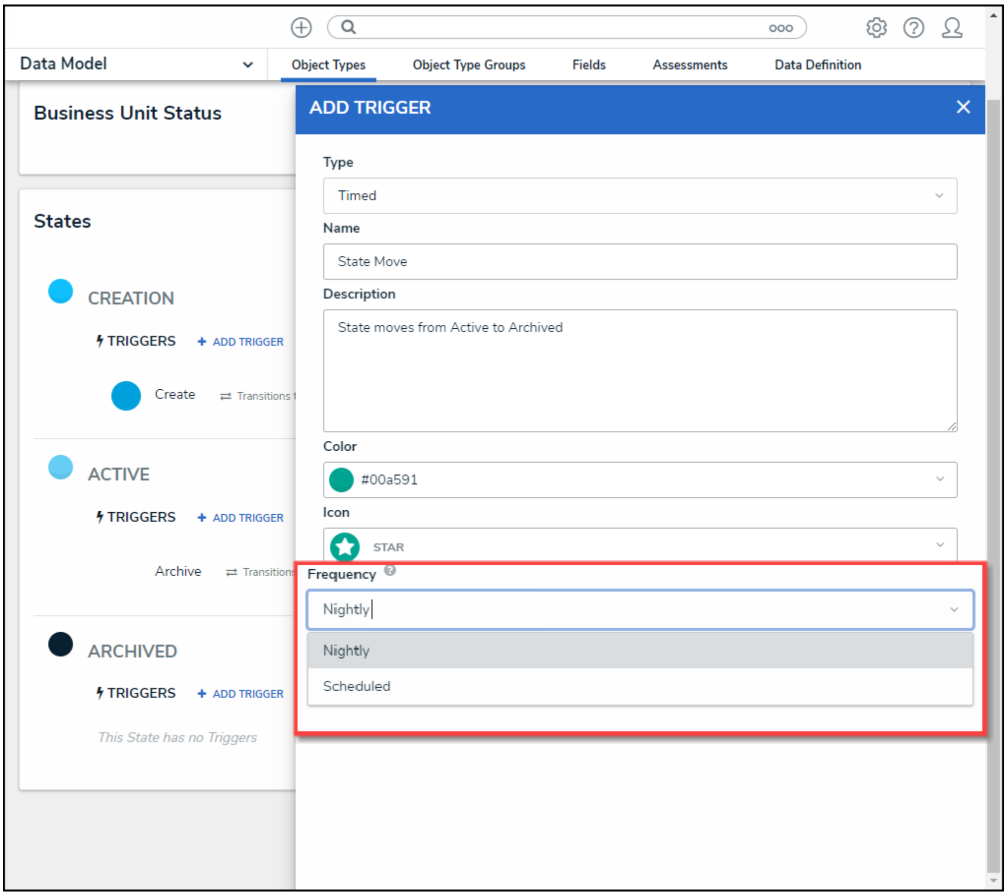
Color Dropdown

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.



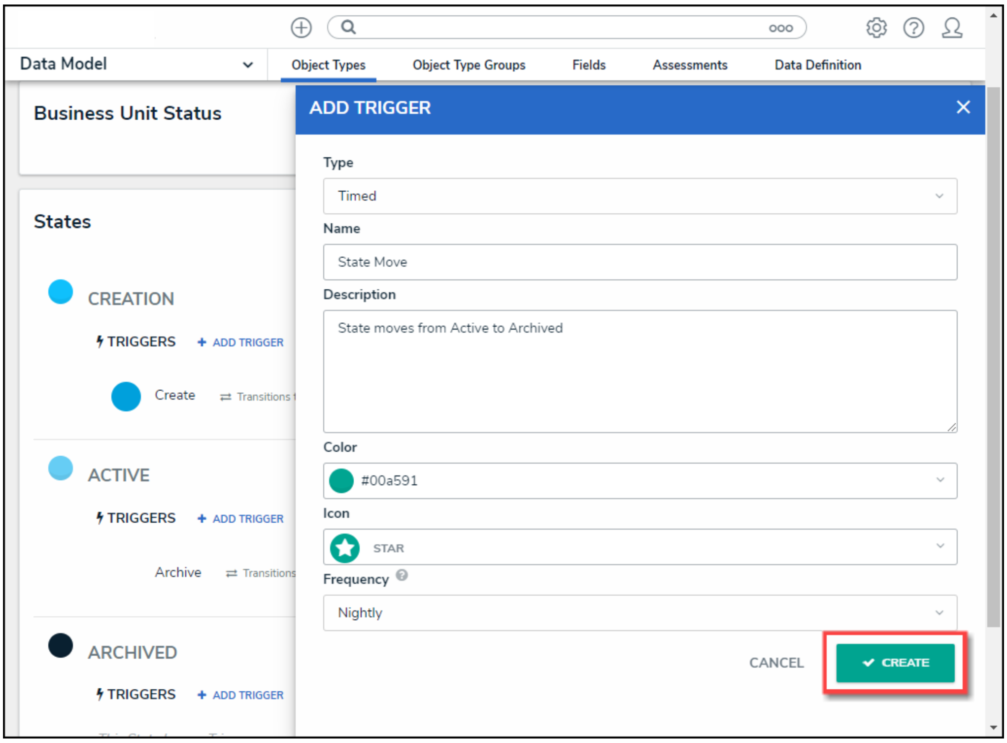
Icon Dropdown

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

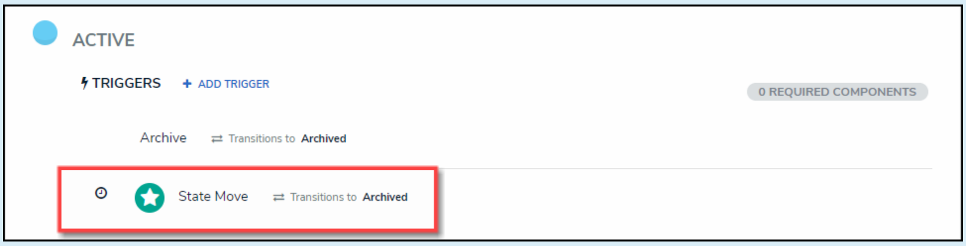


Frequency Field

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

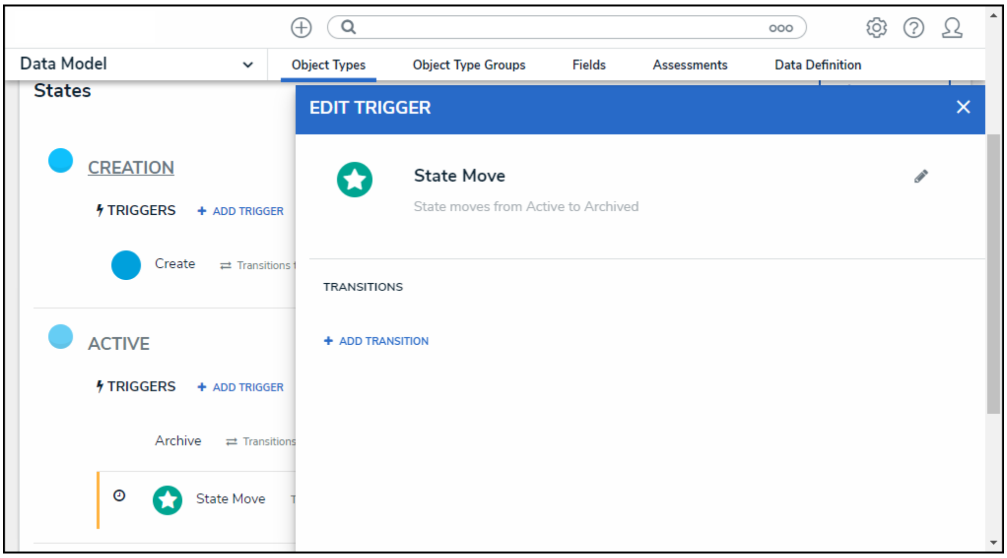


Create Button

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

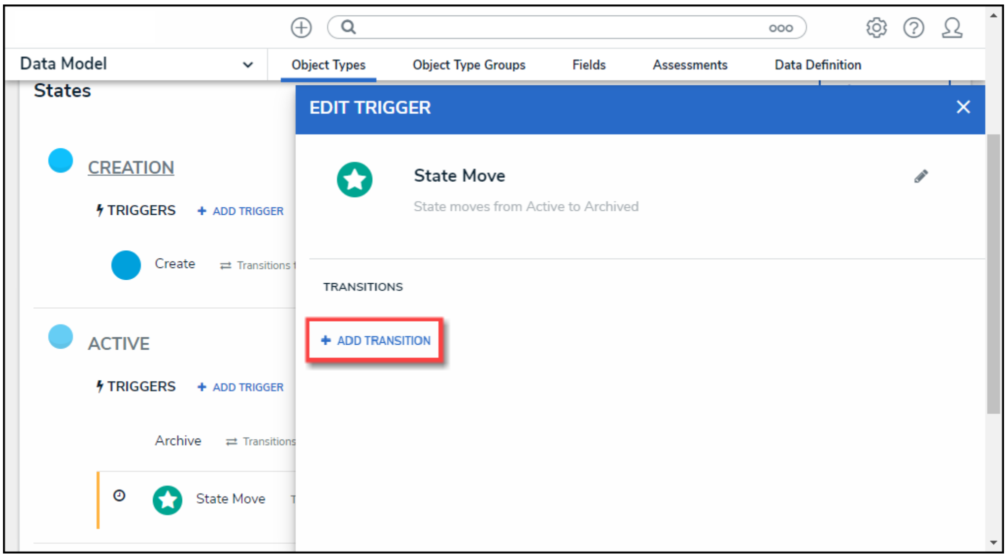
Adding a Transition to a State

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



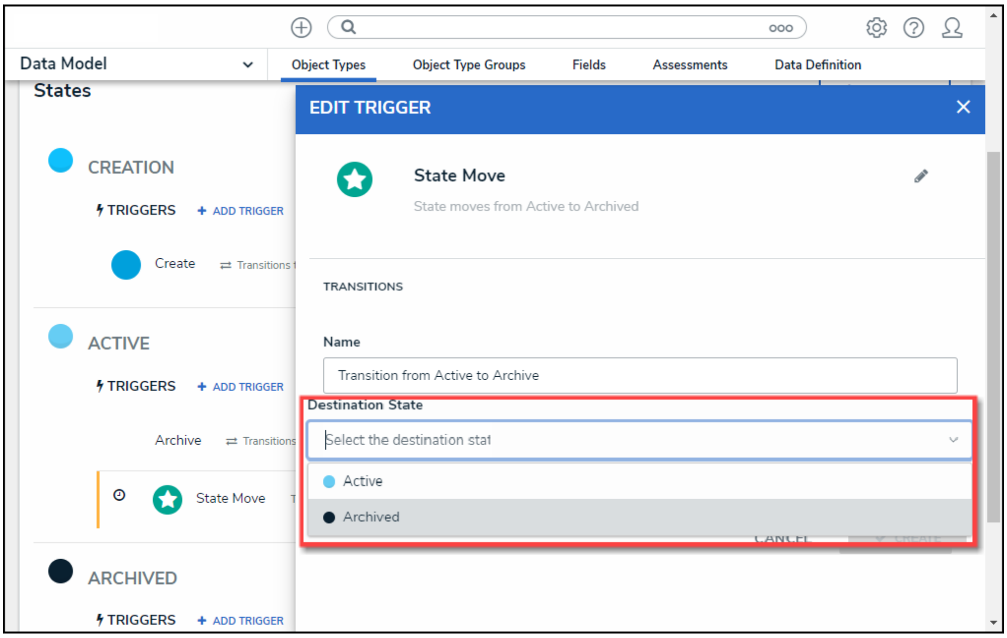
Edit Trigger Pop-up

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



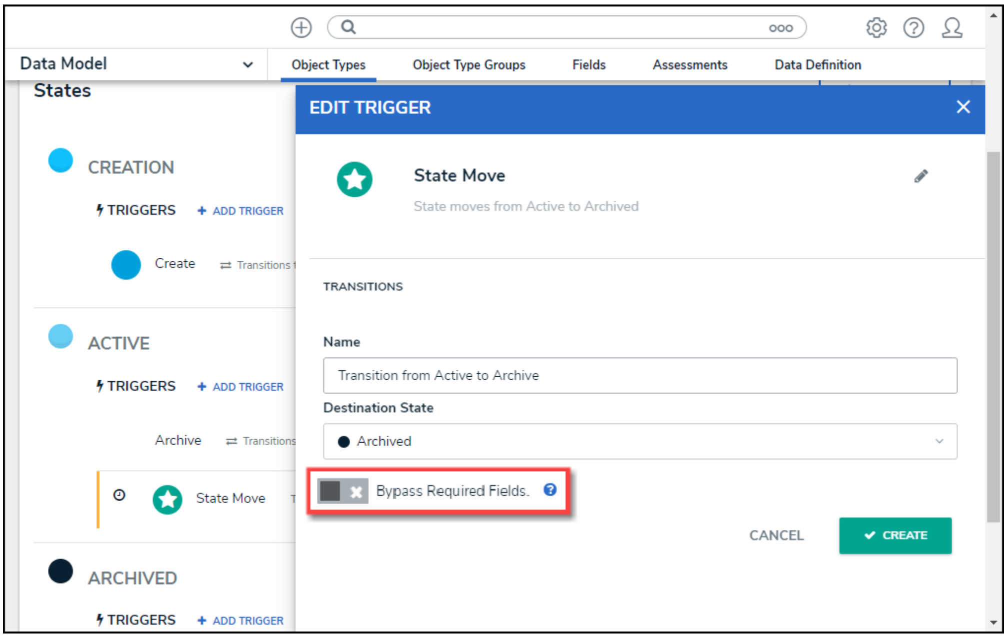
+Add Transition Link

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



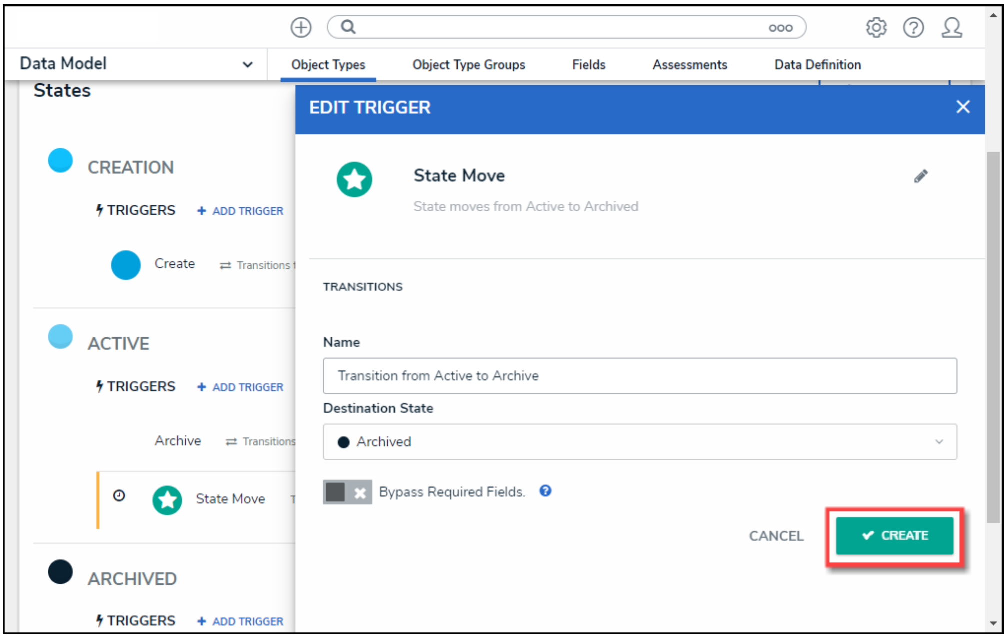
Destination State Dropdown

5. **(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.



Bypass Required Fields

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



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

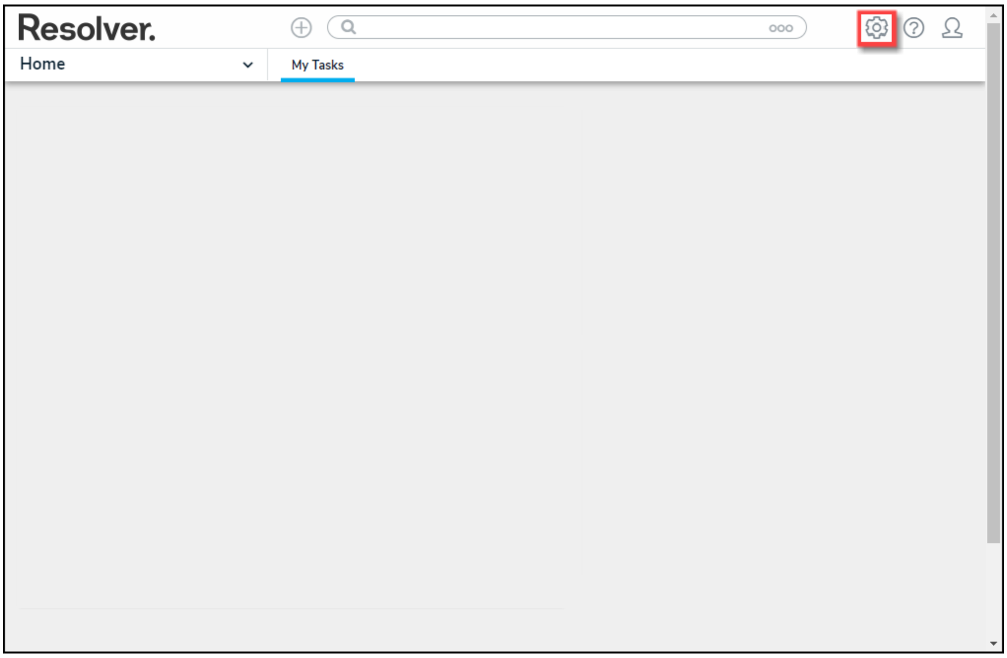
Example

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.

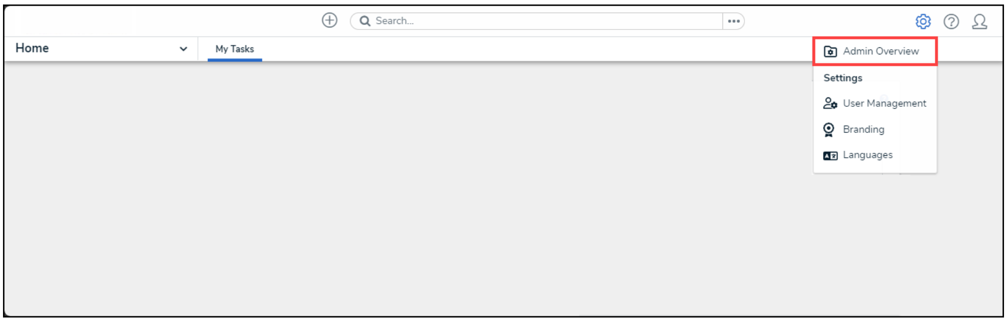
Navigation

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



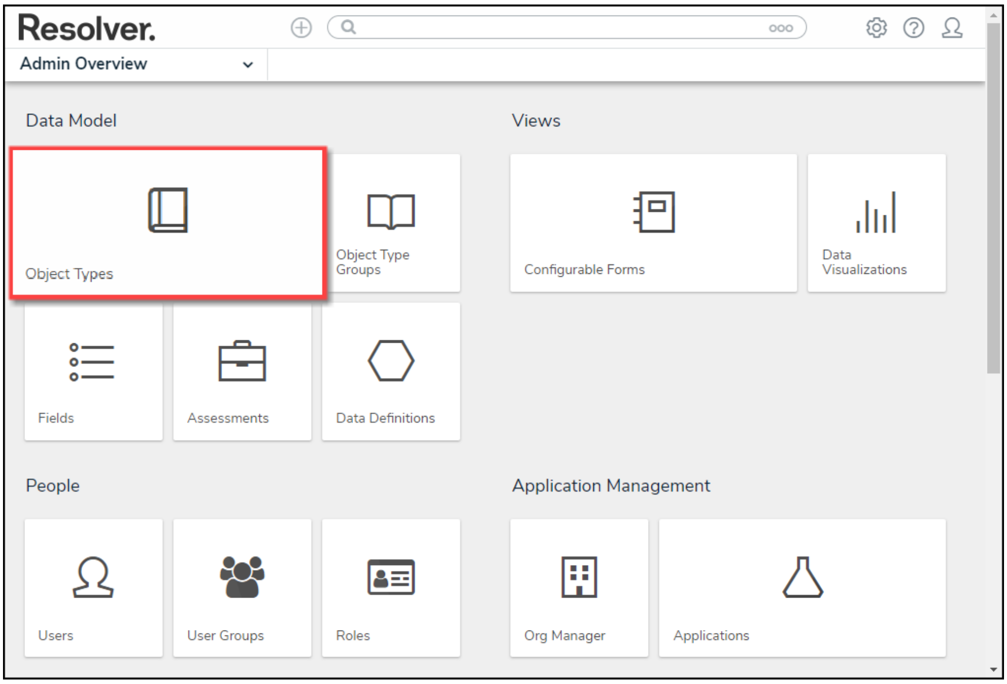
Administration Icon

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



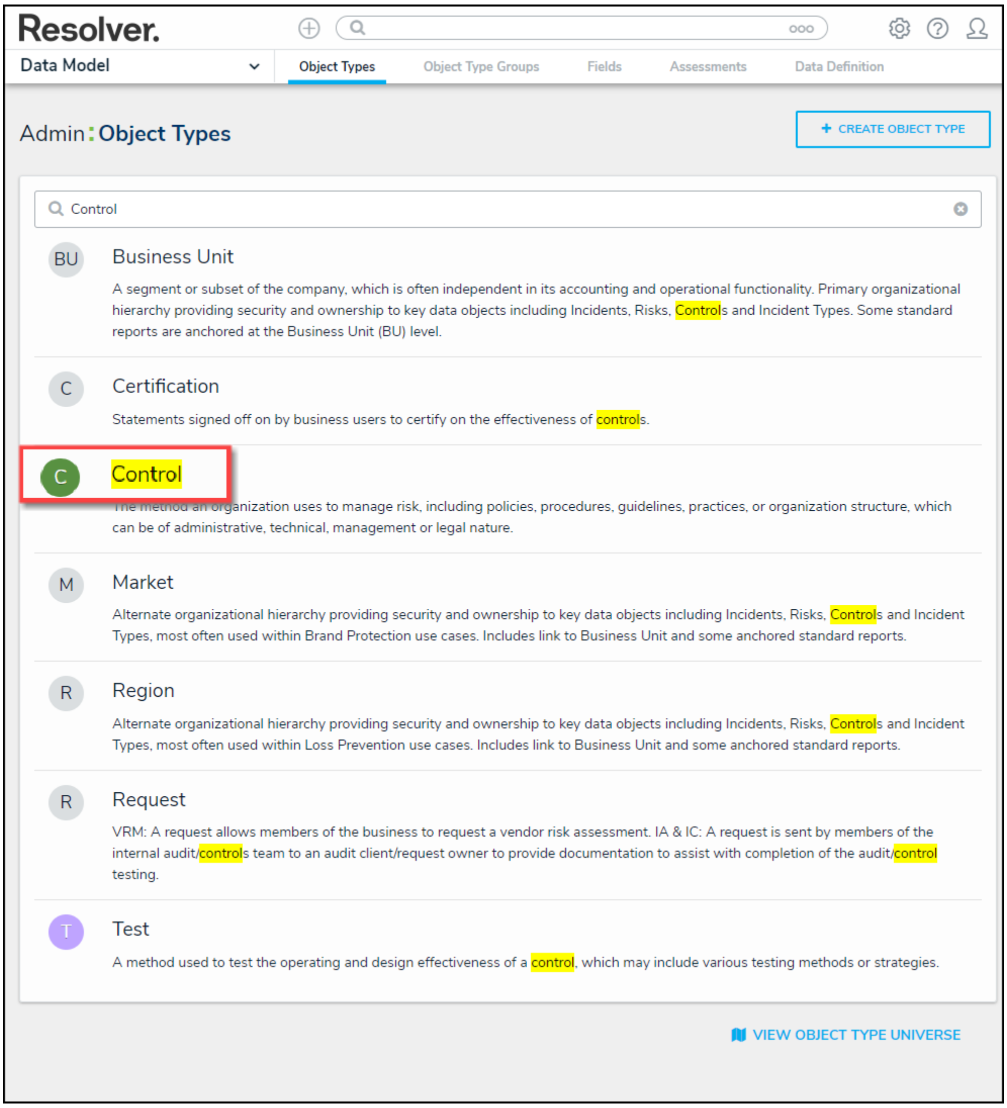
Admin: Overview Link

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



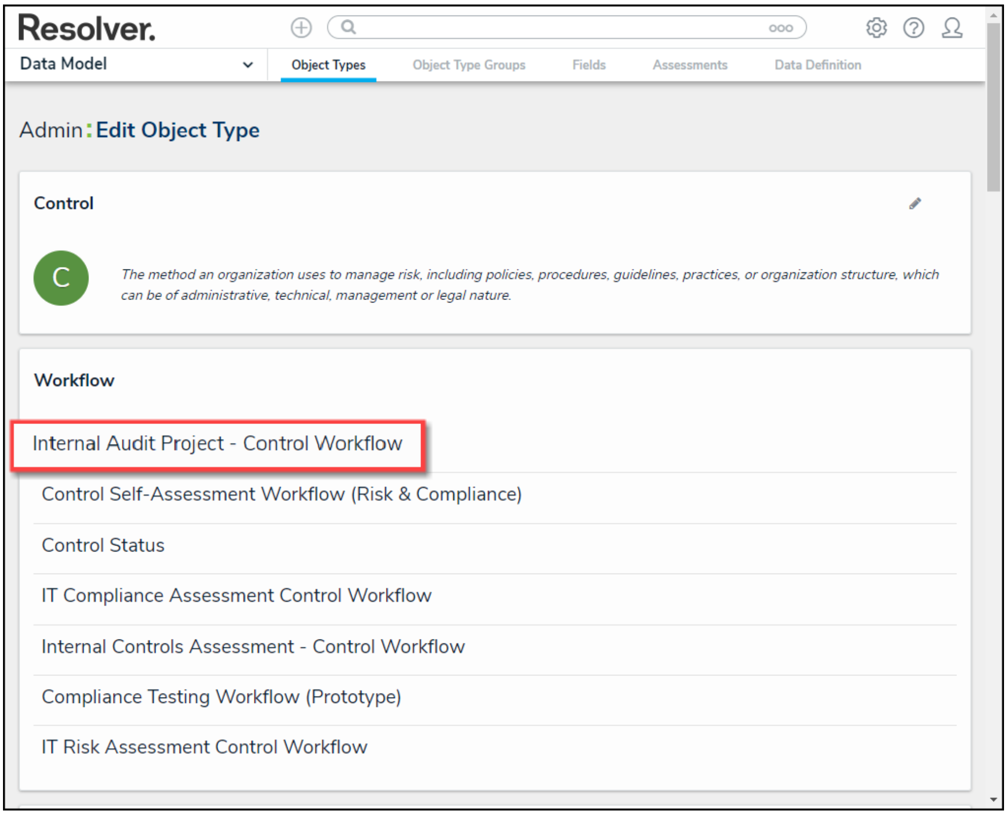
Object Types Tile

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.



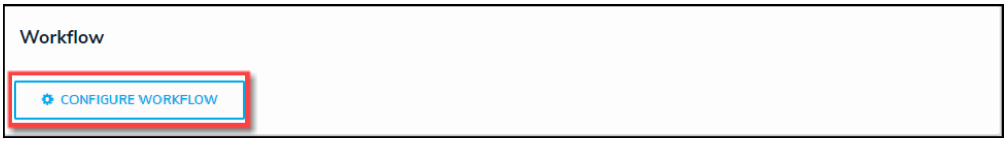
Click the Object Type's Name

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



Click on a Workflow

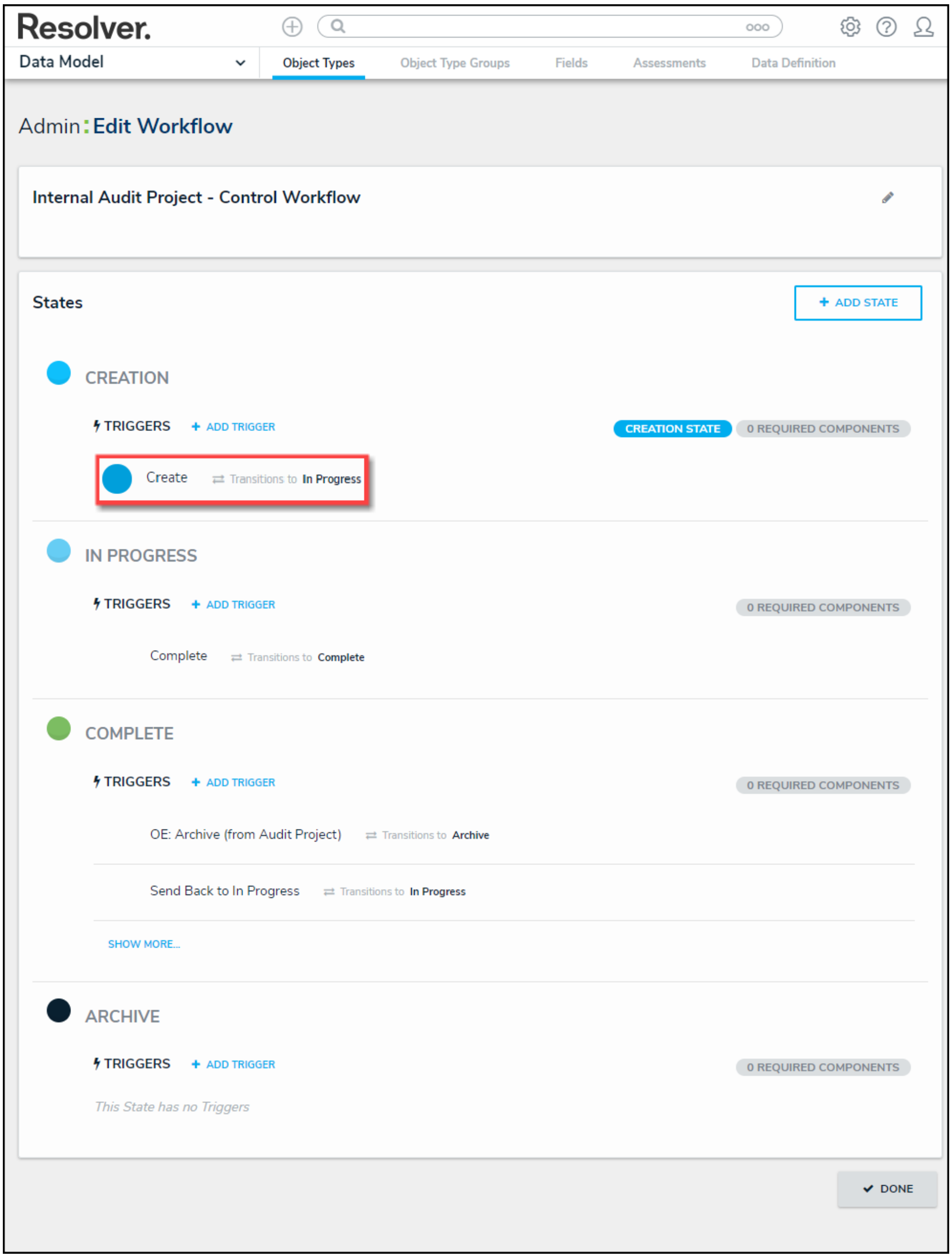
7. If there are no workflows listed, click on the **Configure Workflow** button.



Configure Workflow Button

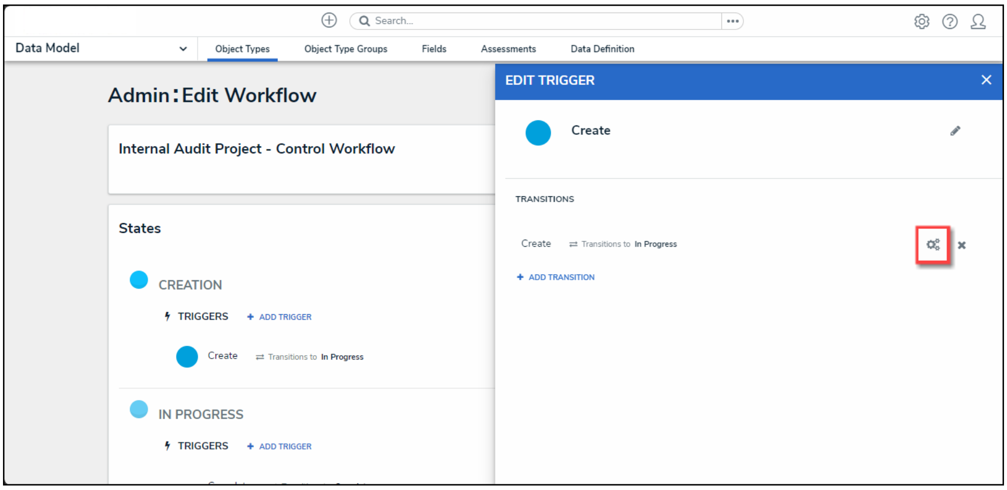
8. From the ***Edit Workflow*** screen, click a **Trigger** under the ***State*** section.

> ***Note:***
> *You must already have a **Trigger** added to a **State** before you can add a condition to a transition.*



Click on a Trigger

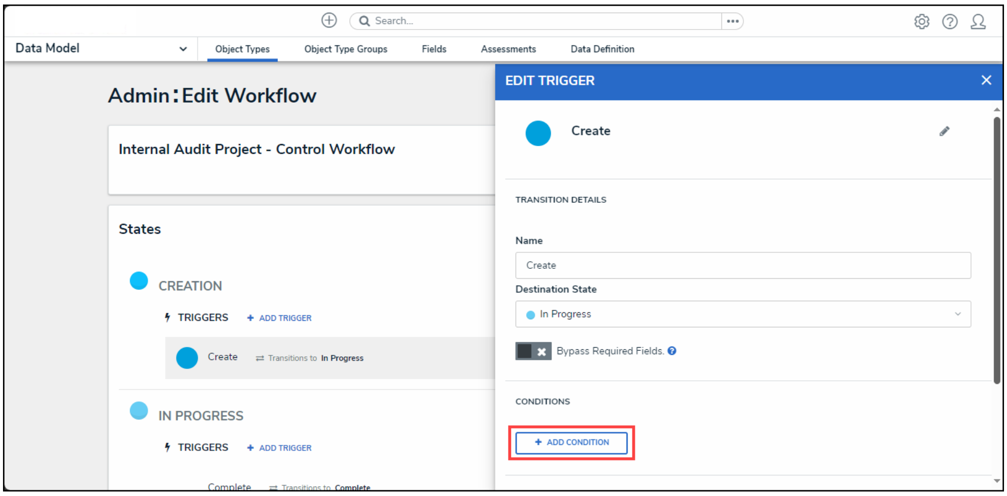
9. From the ***Edit Trigger*** pop-up, click the **Edit** icon next to the transition.



Click the Edit Icon

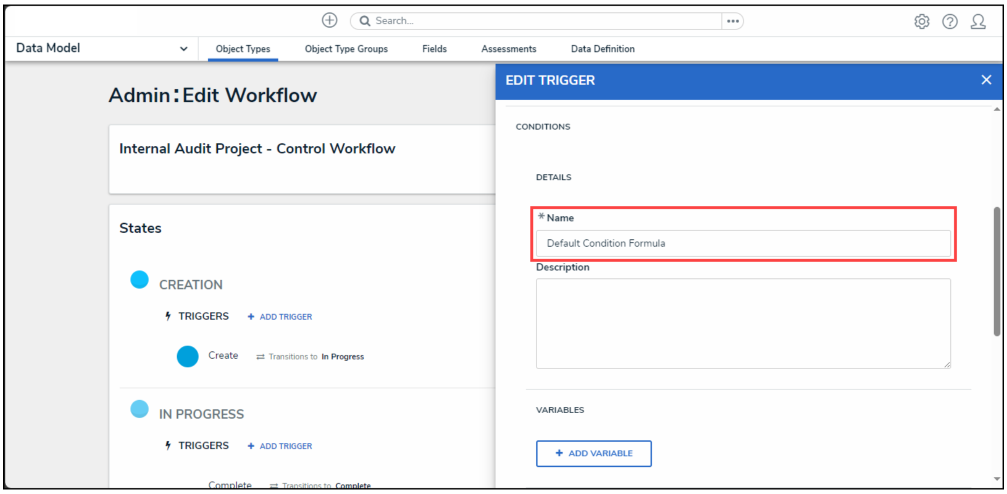
Adding a Condition on a Transition

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



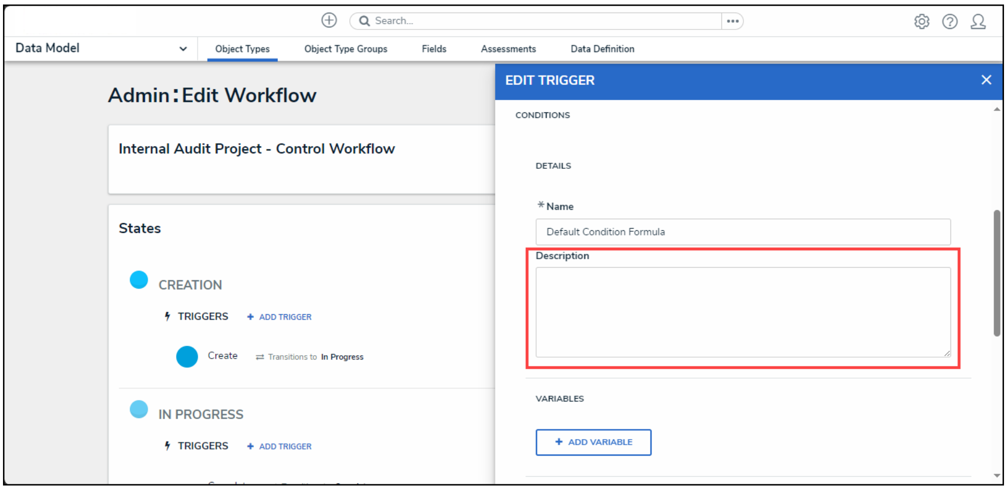
+ Add Conditions Button

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



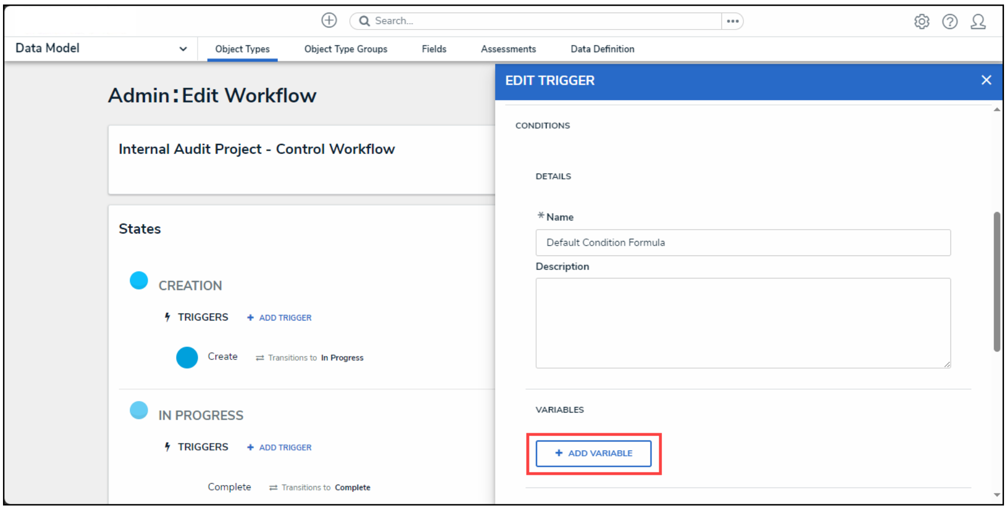
Name Field

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



Description Field

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

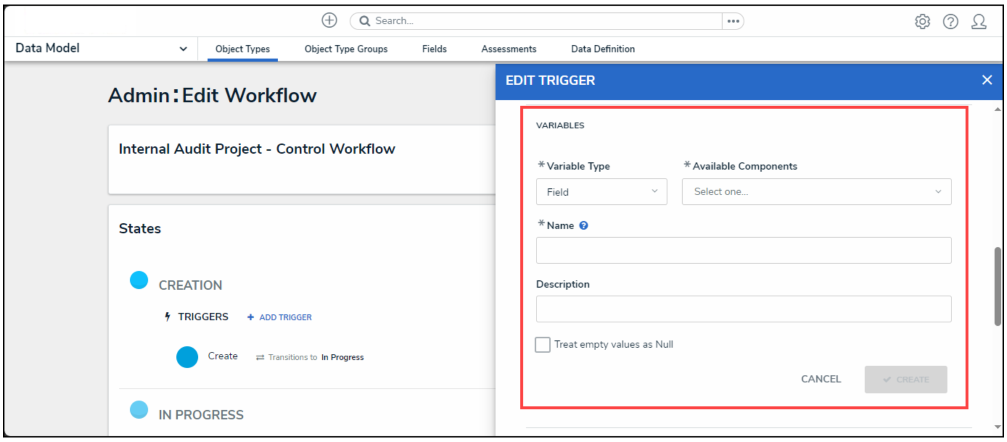


+Add Variable Button

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.

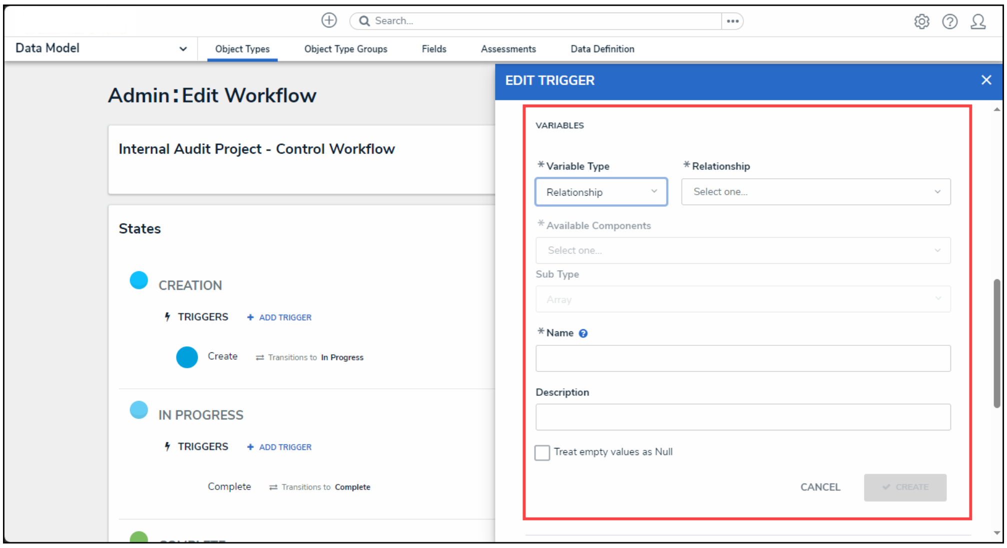
> ***Note:***
> *Fields must be added to a formula after an Object Type or through an association (Relationship or Reference).*
>
> *Only numeric fields, date fields, and select lists (numeric values) are accepted. For more information, see the Fields article.*



Variable Type = Field

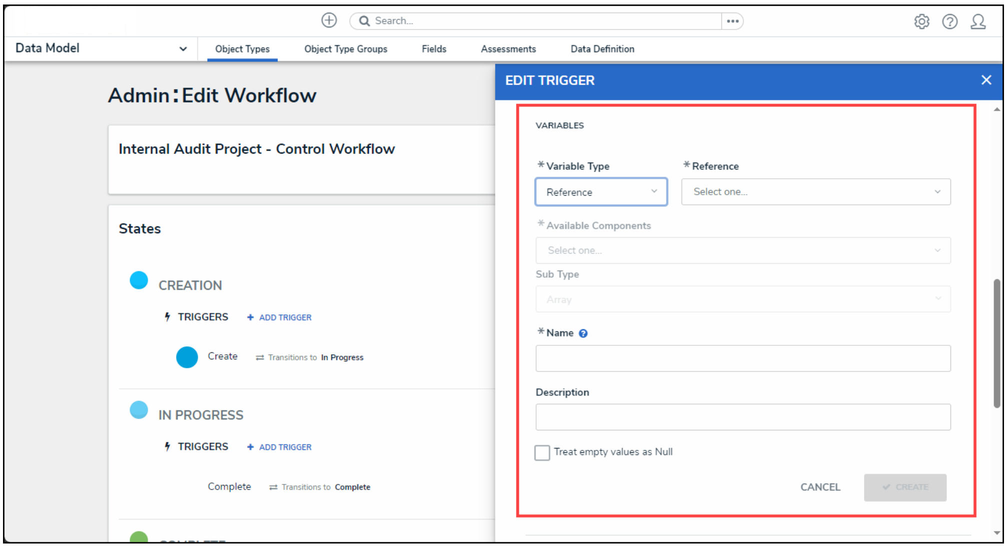
- **Relationship:** After selecting the **Relationship** variable, the following fields will appear:
  - **Relationship:** Select the Object Type **Relationship** from the drop-down list. Relationships connect two or more objects. Relationships must be added to an Object Type to appear on the Relationship 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.



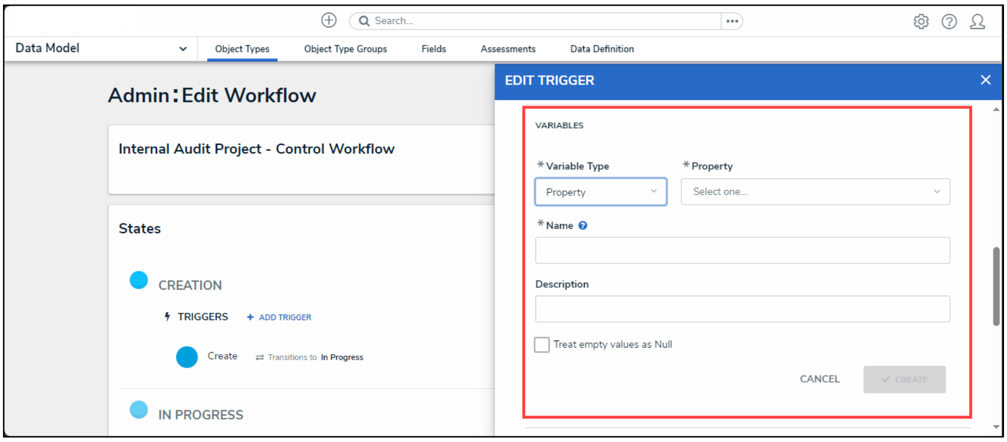
Variable Type = Relationship

- **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

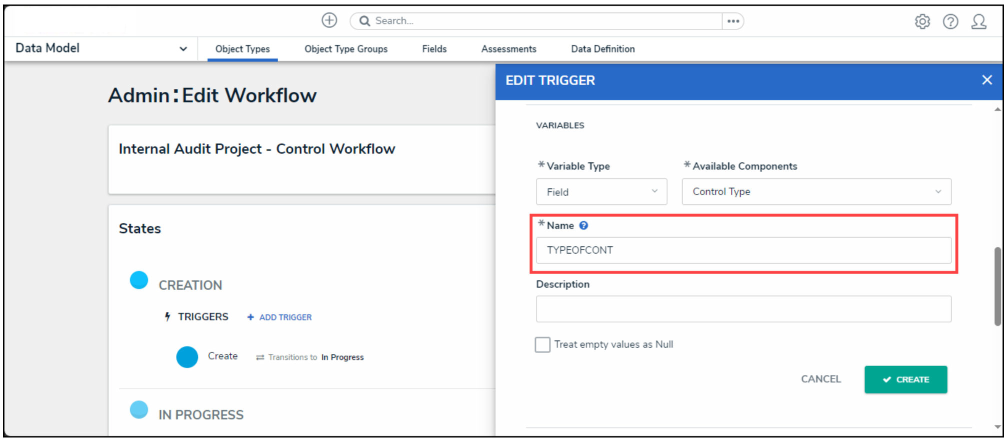
- **Property:** After selecting the **Property** variable, the following field will appear:
  - **Property:** Select a **Property** type from the drop-down list:
    - **Is Submitter Confidential:** This property type creates a formula that compares the number of confidential submissions against the number of not confidential submissions for customers that use the **Confidential Reporting Portal**.



Variable Type = Property

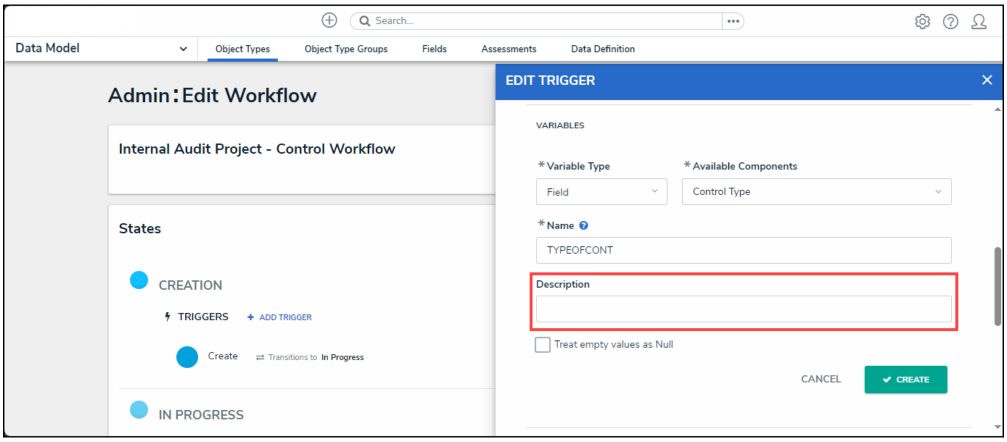
6. The system will automatically populate the Name field with the field or formula's unique ID by default.
7. **(Optional)** Enter a Variable name in the **Name** field.

> ***Warning:***
> *Using a function name (Sub Type Name) in the name field will cause an error.*



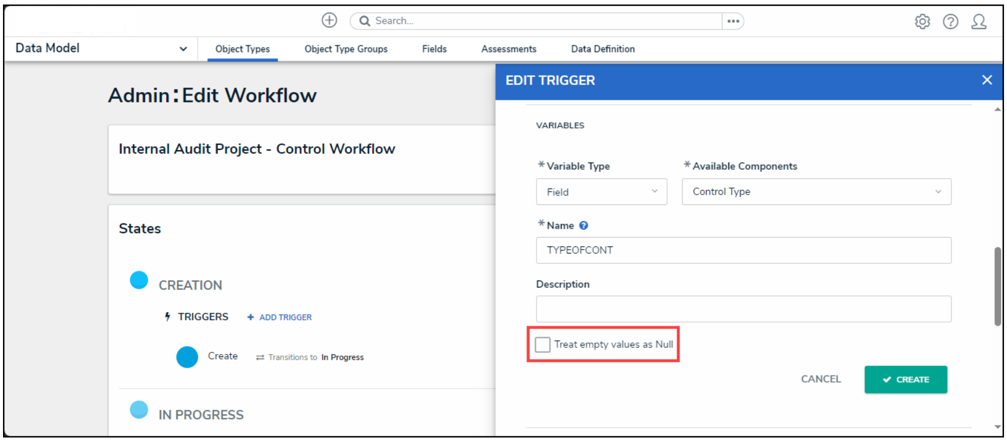
Variable Name

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



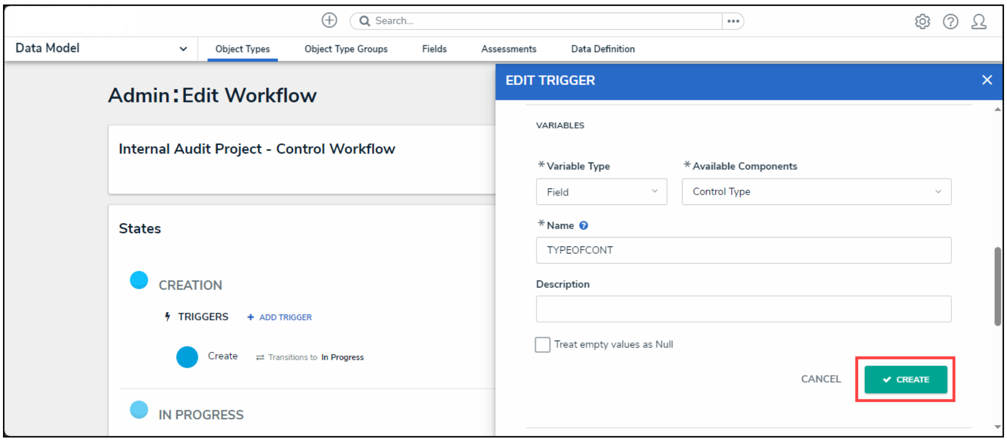
Description Field

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.



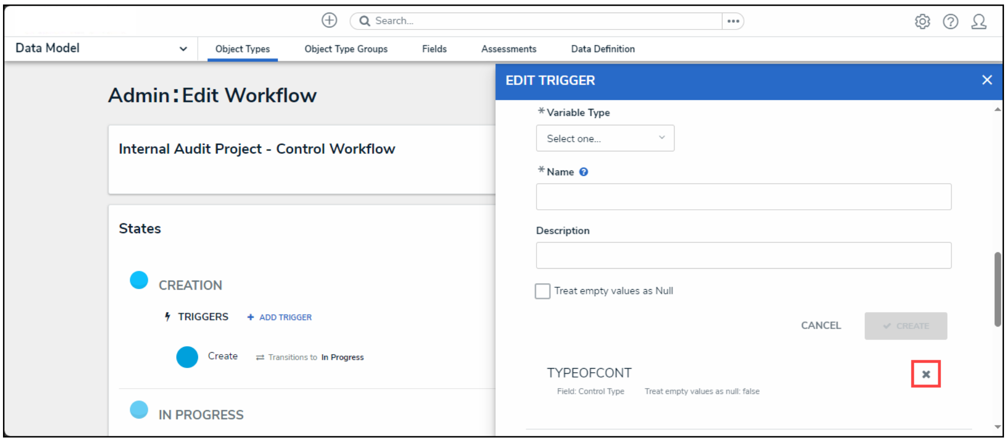
Treat Empty Value as Null Checkbox

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



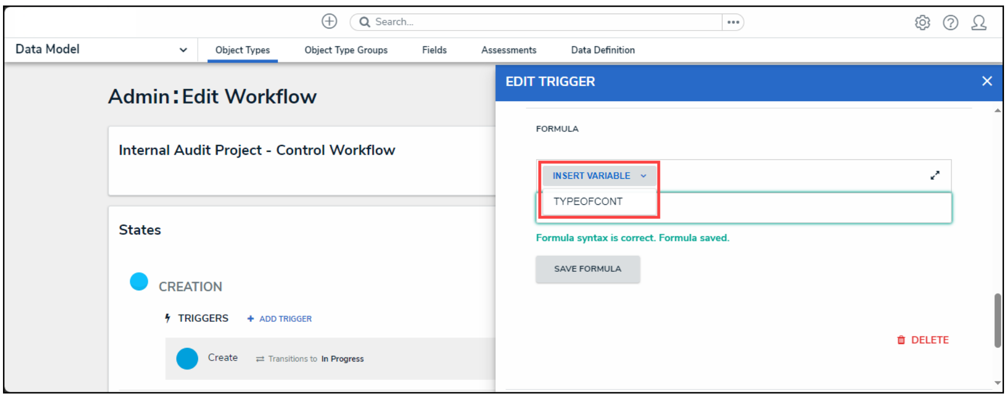
Create Button

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.

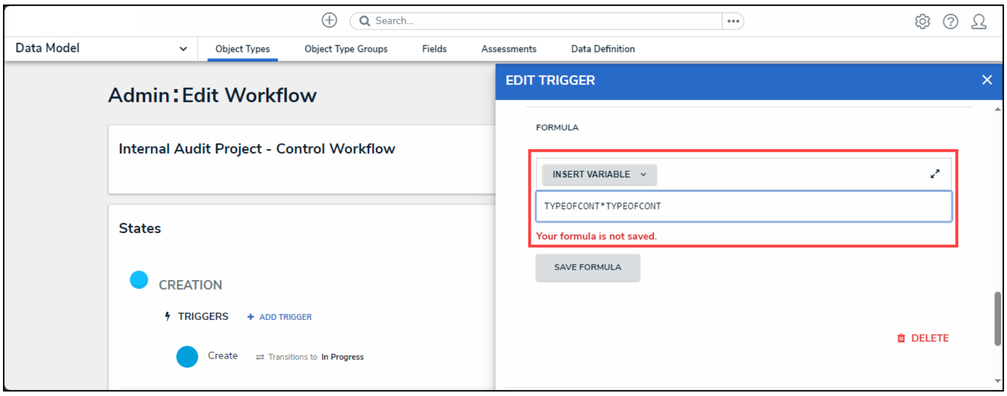


Insert Variable Button

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.

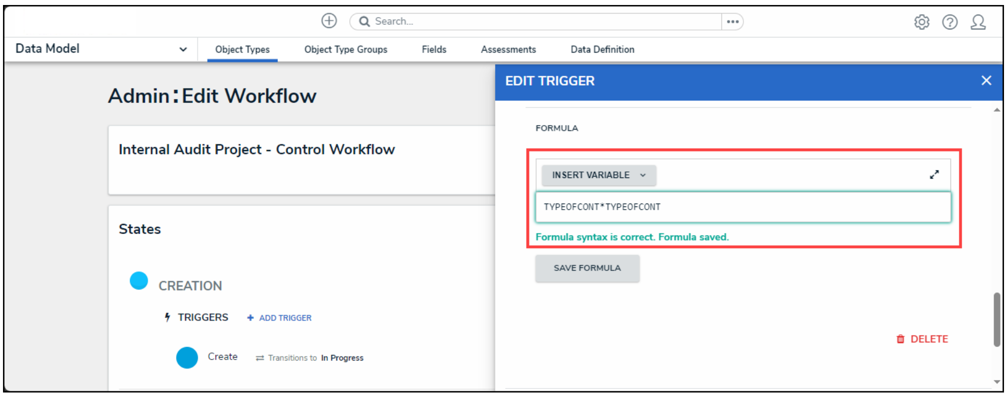
15. A system notification will appear under the **Formula** field, indicating that **Your formula is not saved.**



System Notification - Your Formula is Not Saved

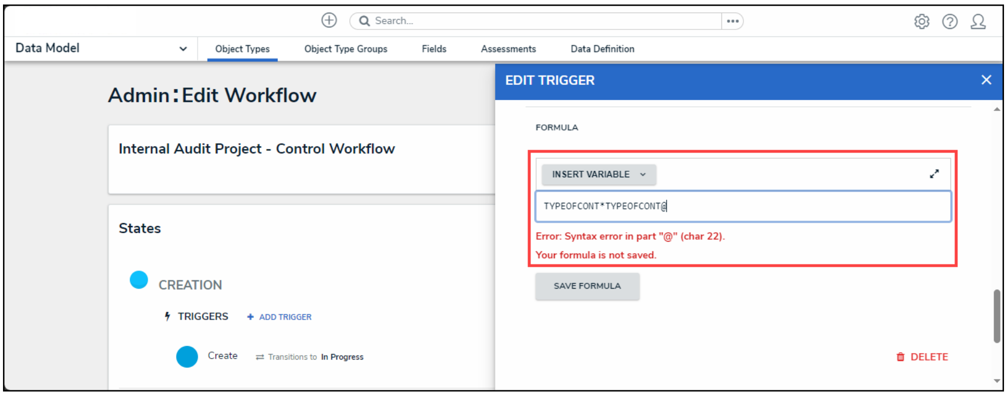
16. Click on the **Save Formula** button. The system will perform a Syntax Validation on the formula if the formula is:

- **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.