

Creating a Workflow Trigger to Pull Data Values by Reference

Last Modified on 06/13/2024 11:13 am EDT

Overview

Users can add context to an Object using the Pull Data Values option on the **Type** dropdown menu on the *Edit Trigger* pop-up within a Workflow Trigger, using a relationship or reference.

User Account Requirements

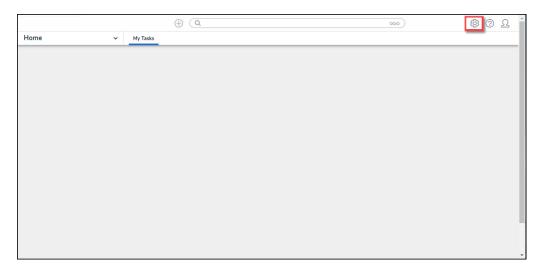
The user account you use to log into Resolver must have Administrator permission to create the Workflow Trigger.

Related Information/Setup

Please see the Transition category for more information on Actions on Workflow Trigger Transition.

Navigation

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



Administration Icon

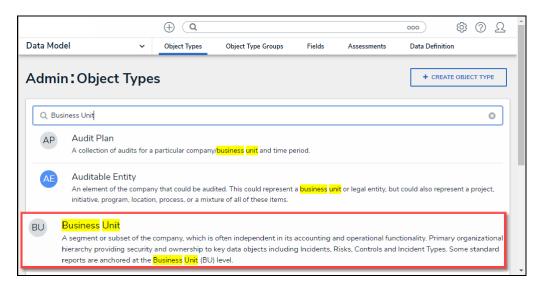
 From the *Admin Overview* screen, click on the **Object Types** tile under the **Data Model** section.



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Admin Overview	~			
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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.



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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.											
	W GURE WORKFLOW										

Configure Workflow Button

5. If multiple Workflows are set up for the Object Type, click the desired Workflow from the list.

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CIT 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								٦			
Citation											
VRM - Citation Workfl	ow										
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Multiple Workflows

6. From the *Edit Workflow* screen, click on a **Trigger** link under a **State**.

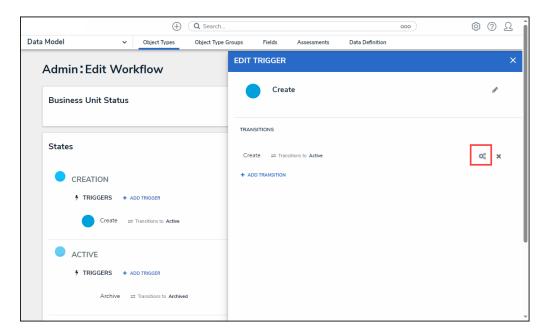


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+Add Trigger Link

Creating a Workflow Trigger to Pull Data Values by Reference

1. From the *Edit Trigger* pop-up, click the Edit Transition icon.



Edit Transition Icon

2. Scroll to the *Action* section.



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States		Dest	tination State					~	
CREATION									
Create =		_	+ ADD CONDITIONS	DN					
ACTIVE	ADD TRIGGER		IONS + ADD ACTION						
Archive	≓ Transitions to Archived							٩E]

Action Section

3. Click the **+ Add Action** button.

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Create	≓ Transitions to Active		+ ADD CONDITIONS	ON					
ACTIVE 4 TRIGGERS	+ ADD TRIGGER		HONS						
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+ Add Action Button

4. From the *Action* section, select the **Pull Data Values** from the **Type** dropdown menu.



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Pull Data Values

5. Enter a name for the transitions in the **Name** field.

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Data Model ~ Object Type Object Type	Groups Fields Assessments Data Definition
Admin:Edit Workflow	EDIT TRIGGER ×
Business Unit Status	CONDITIONS + ADD CONDITION
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Create == Transitions to Active	Object Type
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Name Field

6. Select a **Reference** from the **Object Types** dropdown menu.



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				Loss Event						

Select a Reference

7. Select a **Relationship** from the **Data** dropdown menu.

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Create = Transitions to Open - Follow Up Required	Reference PDV						
Create Annaistoris to Open - Follow Op Required	Object Type						
Complete Transitions to Closed	Geography Intel	~					
	Data						
SHOW MORE	Select one	~					
	Business Unit	RELATIONSHIP					
OPEN - FOLLOW UP REQUIRED	Location	PROPERTY					
TRIGGERS + ADD TRIGGER	Submitter	PROPERTY					
Capture Geolocation for Involved Location = Transitions to Open - Follow Up Required							
Create Incident = Transitions to Escalated to Incident							
SHOW MORE_							

Select a Relationship

8. Click the **Create** button to add the Action to the Workflow Trigger.



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New Action