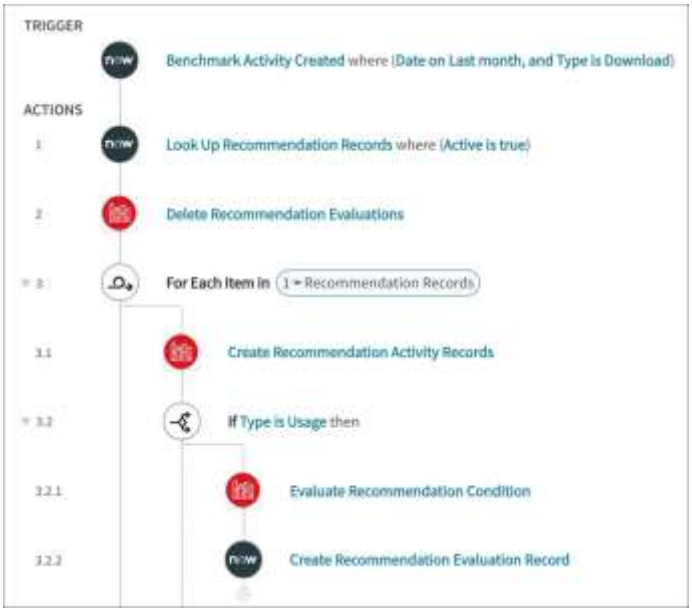
Flow Designer Introduction

What's?

A flow

- Automates business logic for an application or process.
- Is an **automated sequence** of actions that runs **each time a condition is met**.
- Is **repeatable**.
- Performs the same **predefined process** every time it executes.



Flow Designer vs. Workflow

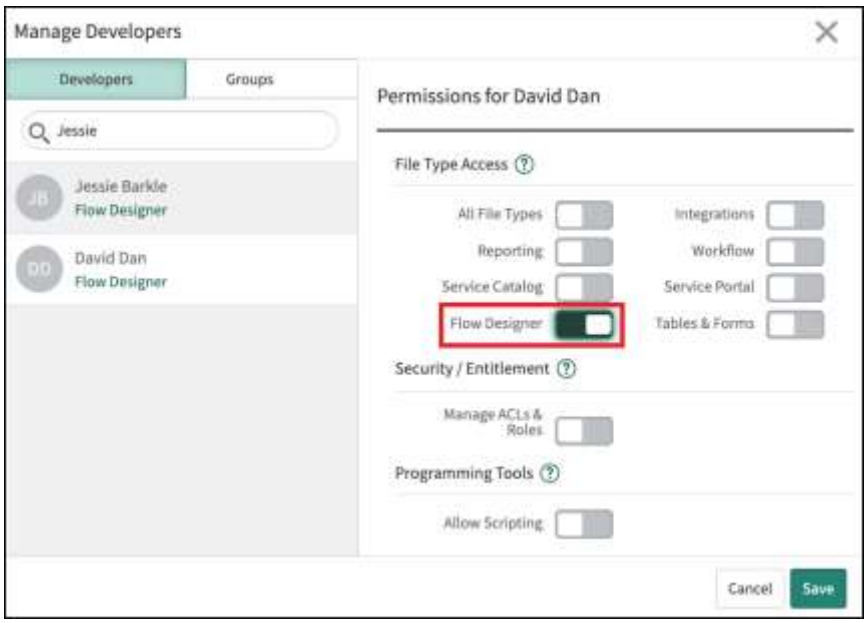
If you are creating something new, always begin with Flow Designer. However there are a few circumstances when you should still use Workflow.

- Instance is running on an earlier release than Kingston.
- If the process requires very complex/scripted flow logic, it can be written in Workflow and called from a flow.
- Changing logic already developed using Workflow.
- Steps required do not exist yet in Flow Designer and require unsupported protocols. There is only a handful of situations were this true.
- You are on an instance before Orlando and SLA Timer is required.

Manage access

- By assigning Flow Designer **delegated development** permission.
- Or by granting one or more Flow Designer **Role(s)**.

- Navigate to **System Applications > Studio** on the Application Navigator.
    - Select the application of interest.
    - Navigate to **File > Manage Developers**.
    - Select a user's name using the **Developer Name** filter.
    - Turn on **Flow Designer**.
    - Select **Save**.



Access roles

flow_designer

Enables a user to launch the Flow Designer design environment to create and edit flows and subflows.

flow_operator

Enables a user to view flow execution details, dashboards, and logs. Grant this role to users so they can view flow results but not create, change, or test them.

action_designer

Enables a user to launch the Action Designer design environment to create and edit actions.

CAUTION!

Granting the **flow_designer** role is the equivalent of granting the **admin** role.

Flow Designer can run flows as the System user, which has access to all tables and all database operations.

Prepare the Flow

First step in creating a flow is to understand what you are building.

- Document every step of the process to be automated.
- Ensure the design is thought through before you develop anything!

Understand Flow processing

1. The scheduler **creates an entry in the event queue** to start the flow.
2. The **system processes the event and starts the flow** in the background.
3. The **system builds a process plan** from the flow.
4. Using the record that triggered the flow, the **system runs the process plan**.
5. The **system stores the execution details** in a context record.
