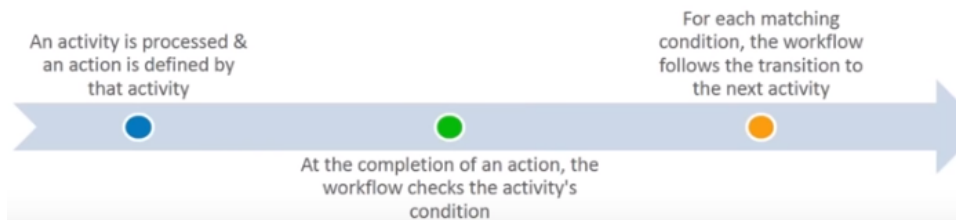


## What Are Workflows?

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- The workflow engine automates multi-step processes
- Each workflow has a sequence of activities
- When the workflow runs out of activities, the workflow is complete



Let's say, for example, we submit a request to create an employee account; we would have common fields, such as first name, last name, and email. These fields would be repeated and implemented via automation. This is accomplished via workflows.

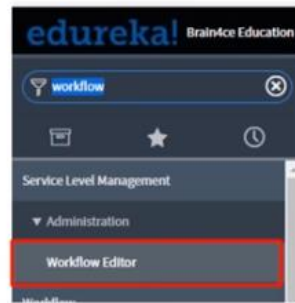
## Workflow Editor

✓ The Workflow Editor is a user interface which defines workflows

✓ While editing, only the *workflow\_creator* or *workflow\_admin* can view the changes

✓ After a workflow is published, it is available to other users

✓ The workflow moves through the process as defined in the Workflow Editor



The workflow editor is an interface that allows us to create and edit workflows. The only people able to do this is the system admin. After it is published, it is available to other users, but they cannot **Check Out** or **Publish** unless they, too, have admin or workflow roles.



Example:

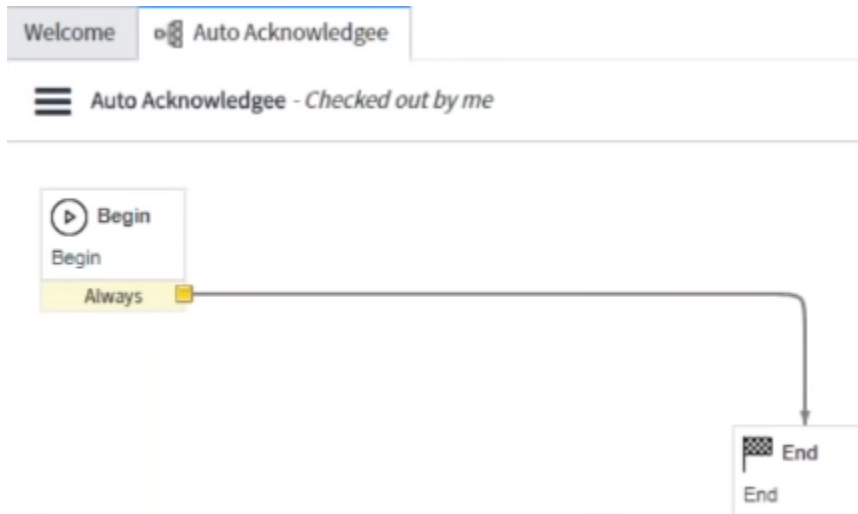
We can set conditions to always run the workflow (as soon as the Task or Incident is created).

We can also set condition to automatically assign the Task or Incident to the group (CAB Approval):

The screenshot shows the 'New Workflow' configuration window. At the top, it says 'Workflow Version [New Workflow view]' with a 'Submit' button. Below this is a blue box with instructions: 'Specify at least one Condition to trigger the workflow. Select one of the following options to determine what happens when a record inserted on the selected table matches the condition: Run the workflow: Workflow(s) start in succession according to the Order column each time an inserted record matches the condition. Run if no other workflows matched yet: The workflow starts when a record matches the condition, only if no other workflows are running on the record. None: The workflow does not start unless it is triggered by a subflow or script.'

Below the instructions, there are two sections: 'If condition matches' with a dropdown menu set to 'Run the workflow always', and 'Condition' with buttons for 'Add Filter Condition' and 'Add "OR" Clause'. The 'Condition' section shows a configuration: 'Assignment group' is selected from a dropdown, followed by 'is' from another dropdown, and 'CAB Approval' from a text input field. There are also 'AND', 'OR', and 'X' buttons for logical operators. A 'Submit' button is at the bottom left.

...as we can see the Workflow has a **Begin** step and an **End** step:



...however, we also need to figure out who to assign it to... so we add a **Set Value** activity:

New Activity: Set Values ?

Workflow Activity  
New record [Diagrammer view]

Name: Aknowledge2

Stage ?

Values

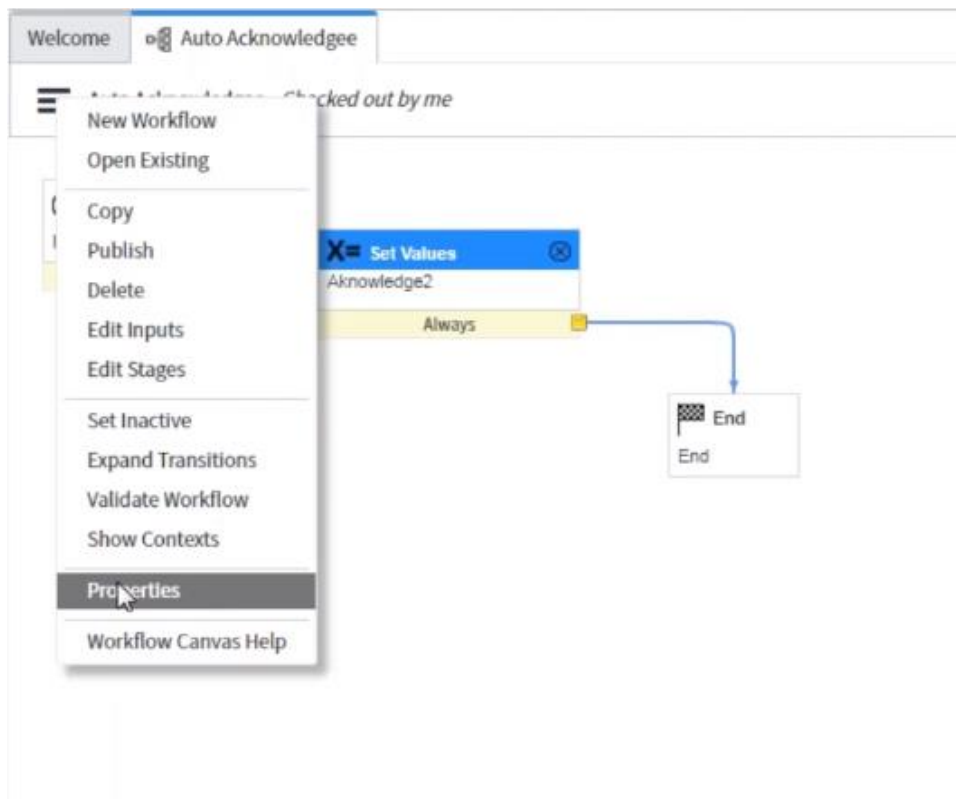
The Set Values activity sets the value of the fields specified below into the current record. [More Info](#)

Set these values

Assigned to	Ron Kettering	X
Work notes	assignment user	X

... the Task (or Incident) will automatically be assigned to Ron Kettering, with “Assignment User” filled out in the Work Notes field.

If we go to Properties of the Workflow...



...we can see the following info:

Workflow Properties ✕

< Workflow Version - Auto Acknowledgee [Diagrammer view] 🔗 ↔ ⋮ Update Delete

A workflow automates and visualizes a multi-step process as a sequence of activities. [More Info](#)

General Conditions Inputs Activities Application Schedule Estimated Runtime

\* Name  Checked out

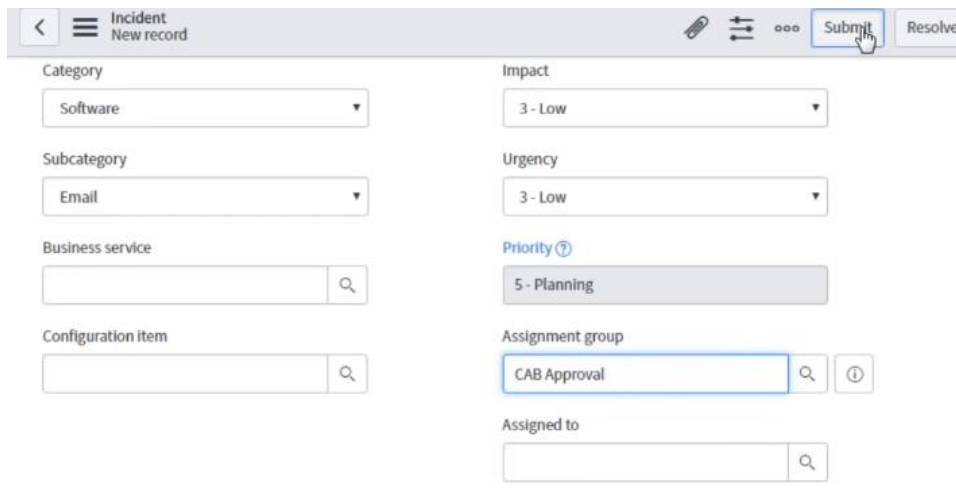
Table Incident (Incident) Checked out by

Published ☐

Description

Update Delete

Now, if we create a new Incident assign it to CAB Approval Group...



Incident New record

Category: Software

Subcategory: Email

Business service:

Configuration item:

Impact: 3 - Low

Urgency: 3 - Low

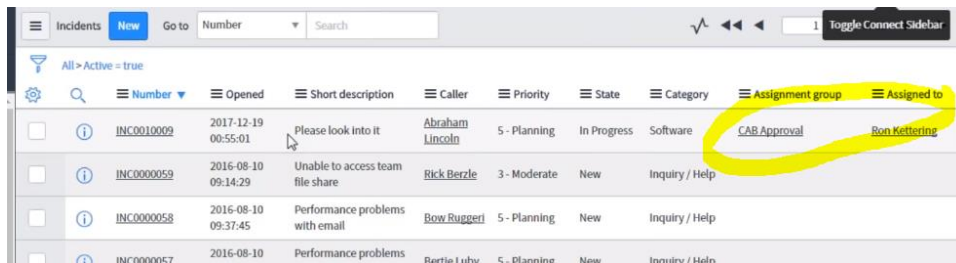
Priority: 5 - Planning

Assignment group: CAB Approval

Assigned to:

Submit

...we can see in the Incident Table that it has been automatically assigned to Ron Kettering:



	Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to
<input type="checkbox"/>	<a href="#">INC0010009</a>	2017-12-19 00:55:01	Please look into it	Abraham Lincoln	5 - Planning	In Progress	Software	CAB Approval	Ron Kettering
<input type="checkbox"/>	<a href="#">INC0000059</a>	2016-08-10 09:14:29	Unable to access team file share	Rick Berzle	3 - Moderate	New	Inquiry / Help		
<input type="checkbox"/>	<a href="#">INC0000058</a>	2016-08-10 09:37:45	Performance problems with email	Bow Ruggeri	5 - Planning	New	Inquiry / Help		
<input type="checkbox"/>	<a href="#">INC0000057</a>	2016-08-10	Performance problems	Rettie Lubv	5 - Planning	New	Inquiry / Help		