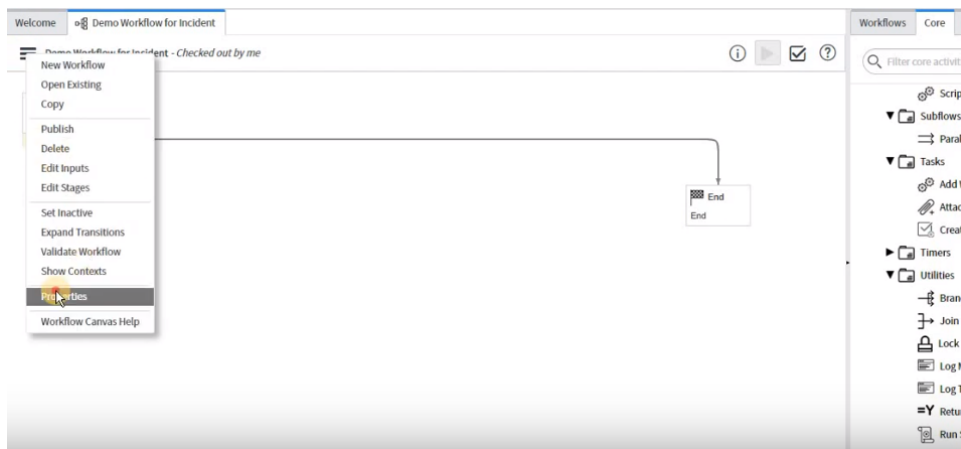


Let's say client provides the requirements for a Workflow:

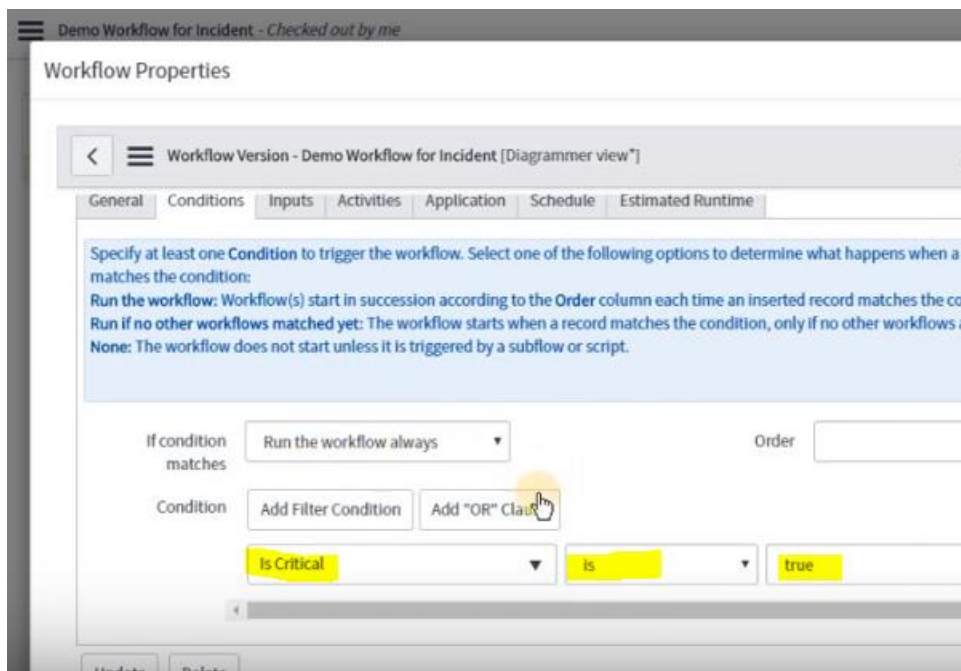
1. When user check "Is critical" checkbox and save the incident then field values should get updated, such as state = In Progress, Priority=Critical, Urgency=high, impact=high.
2. Critical Incident record will move for approval for review and approver should be displayed in related list.
3. If approver approves the critical incident record, then one fulfillment task should be attached to the incident.
4. Once the above task is closed complete then incident will automatically get closed.
5. If approver rejects the critical incident record then state=New, Priority=3, urgency=medium and impact=medium should be updated in the incident record and should be assigned to some group for fulfillment.

REQUIREMENT #1

Step One: Go to Properties



Step Two: Set the Condition **IsCritical Is True** :



Step Three: Add the **Set Values** Activity to the Workflow and set values according to requirements:

New Activity: Set Values ?

< Workflow Activity
New record [Diagrammer view]

Stage ?

Values

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

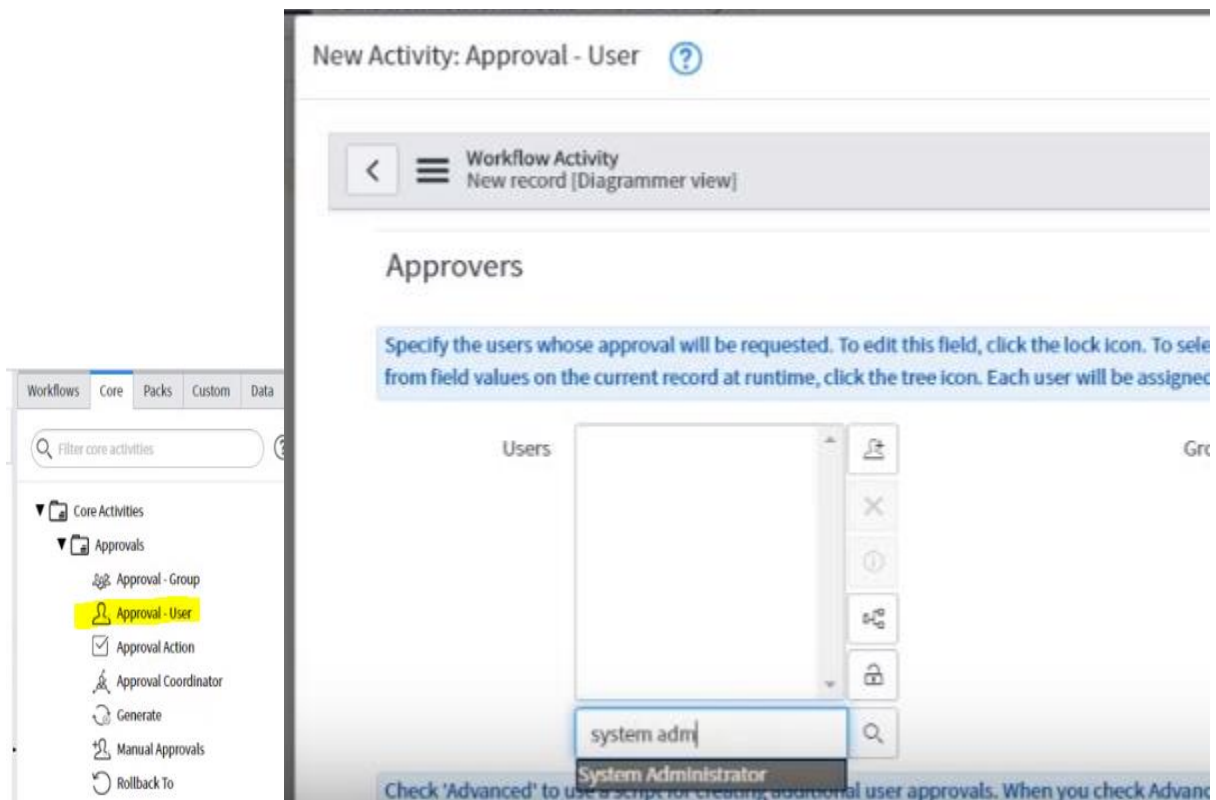
Set these values

Incident state	In Progress
Priority	1 - Critical
Urgency	1 - High
Impact	1 - High
Work notes	All field values are set by Workflow

...we also added Work Notes to say, "All field values are set by Workflow." This means when we open the Incident, the Work Notes will have this typed in for explanation as to why the values are set as such.

REQUIREMENT #2

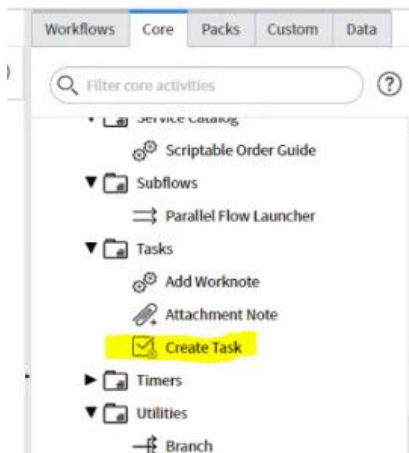
Step One: Add the **Approval-User** Activity to the Workflow and set a user as Approver:



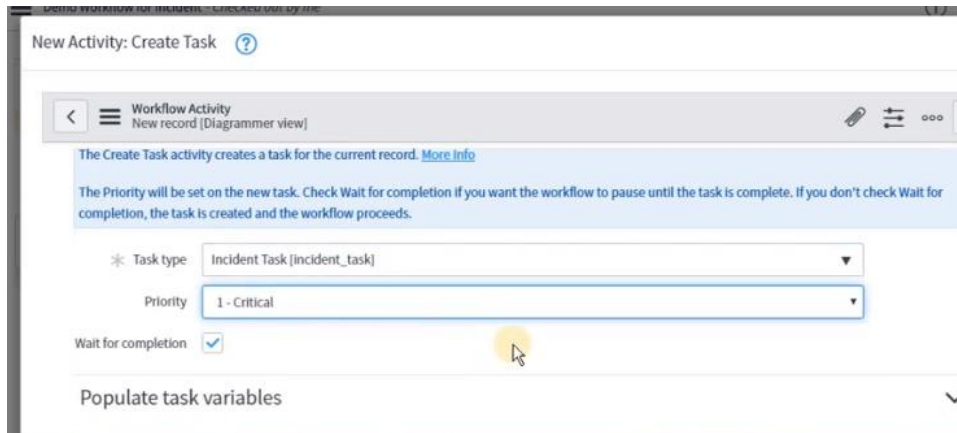
...in this example, we use System Administrator as the Approver.

REQUIREMENT #3

Step One: Add the **Create Task** Activity to the workflow:



Step Two: Set **Task Type** to Incident_Task and **Priority** to 1:



Step Three: Set the Task Variables accordingly:

The screenshot shows a web interface for creating a new task. At the top, there's a header bar with a back arrow, a menu icon, the text 'Workflow Activity', and 'New record [Diagrammer view]'. To the right of the header are icons for a pin, a list, and a 'Submit' button. Below the header, there's a section titled 'Populate task variables' with a dropdown arrow. A blue tooltip box explains: 'In "Task value from" specify the source of data for populating the fields in the new task. Select from Fields, Template, or Values. Once the source is selected, the appropriate fields will display.' The form contains several input fields: 'Task values from' (a dropdown menu currently showing 'Fields'), 'Fulfillment group' (a text input with 'SR_Approver group' and search/info icons), 'Assigned to' (a text input with 'System Administrator' and search/info icons), and 'Short description' (a text input with 'Critical Incident Fulfillment').

New Activity: Create Task ?

Workflow Activity
New record [Diagrammer view]

wait for completion

Populate task variables

In "Task value from" specify the source of data for populating the fields in the new task. Select from Fields, Template, or Values. Once the source is selected, the appropriate fields will display.

Task values from Fields

Fulfillment group SR_Approver group

Assigned to System Administrator

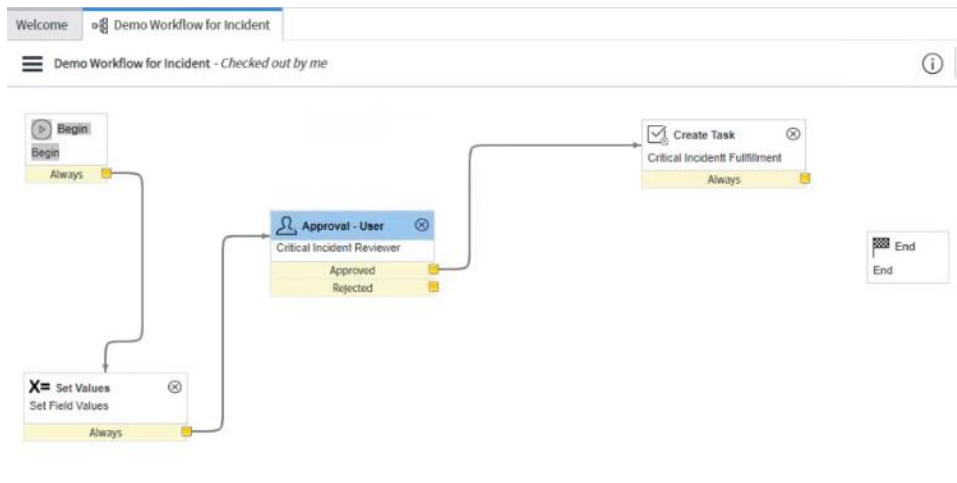
* Short description Critical Incident Fulfillment

Submit

...click Submit.

BETWEEN REQUIREMENTS #3 and #4

So far on our workflow: if the Approver does approve, it will create a Task:



REQUIREMENT #4

Step One: Add a **Set Values** Activity (Approved) to the Workflow and configure the fields accordingly:

The screenshot shows a web application window titled "New Activity: Set Values". The window has a header bar with a back arrow, a menu icon, the text "Workflow Activity" and "New record [Diagrammer view]", and a toolbar with a pin icon, a list icon, a three-dot menu, and a yellow "Submit" button. Below the header, a blue informational bar states: "The Set Values activity sets the value of the fields specified below into the current record. [More Info](#)". The main area is titled "Set these values" and contains three rows of field-value pairs. The first row has "Incident state" and "Closed". The second row has "Work notes" and "Incident is Closed by Critical Task Team". The third row has "-- choose field --" and "-- value --". Each row has a close button (X) to its right. At the bottom left is a "Submit" button, and at the bottom right is a "Related Links" section.

New Activity: Set Values ?

Workflow Activity
New record [Diagrammer view]

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

Set these values

Incident state	Closed	X
Work notes	Incident is Closed by Critical Task Team	X
-- choose field --	-- value --	

Submit

Related Links

REQUIREMENT #5

Step One: Add a **Set Values** Activity (Rejected) to the Workflow and configure the fields accordingly:

New Activity: Set Values ?

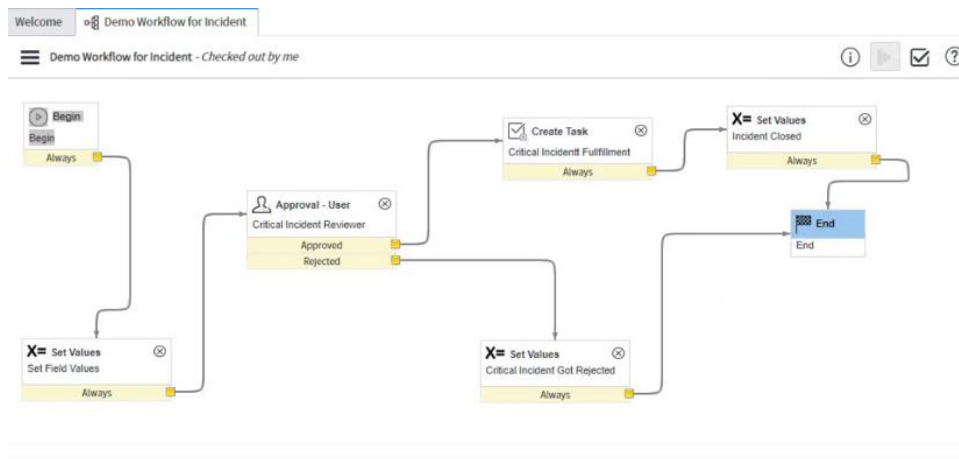
< Workflow Activity
New record [Diagrammer view]

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

Set these values

Urgency	▼	2 - Medium	▼
Impact	▼	2 - Medium	▼
Priority	▼	3 - Moderate	▼
Is Critical	▼	false	▼
Work notes	▼	Incident is rejected by Critical Incident Reviewer	
Assignment group	▼	Network CAB Managers	🔍

And now we have our completed Workflow:



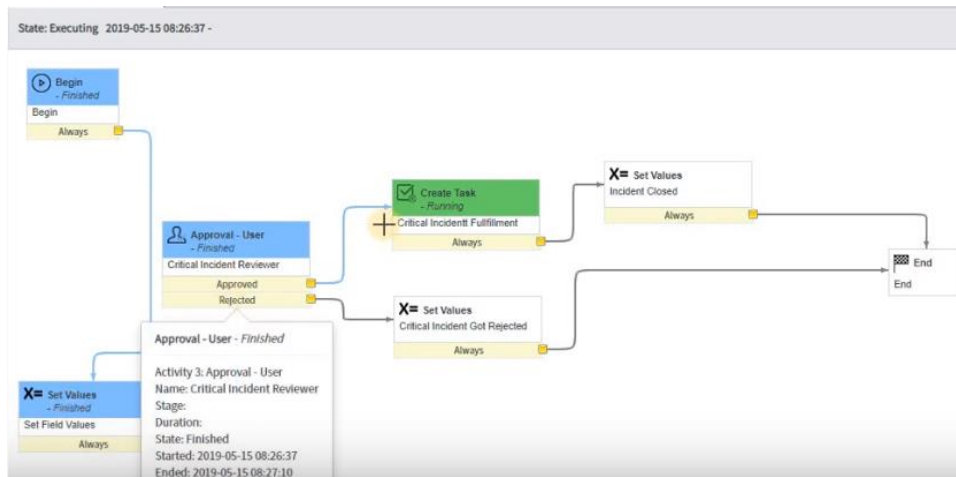
So now, if we open a new Incident, we can go to the Request:

The screenshot shows the 'Incident' view for INC0010924. At the top, there are buttons for 'Update', 'Resolve', and 'Delete'. Below this, there are 'Related Links' for 'Show SLA Timeline' and 'Repair SLAs'. The main section has tabs for 'Task SLAs (2)', 'Approvers (1)', 'Incident Tasks', and 'Task Activities'. The 'Approvers (1)' tab is active, showing a table with one row for 'System Administrator' in the 'Requested' state, created on 2019-05-15 08:26:37. A yellow 'Request' button is highlighted over the 'Requested' state. At the bottom, there is a dropdown for 'Actions on selected rows...'.

... and let's say we approve the request:

The screenshot shows the 'Approval' view for Incident INC0010924. At the top, there are buttons for 'Update', 'Approve', and 'Reject'. The 'Approve' button is highlighted with a yellow circle. Below this, there are fields for 'Approver' (System Administrator) and 'State' (Requested). There is a 'Comments' text area with a 'Post' button. Below the comments, there is an 'Activities' section showing a log of changes: 'Field changes' by 'System Administrator' on 2019-05-15 08:26:37, with the state changing from 'Requested' to 'Requested'. At the bottom, there are buttons for 'Update', 'Approve', 'Reject', and 'Delete'. A footer bar shows 'Summary of item below announced' and 'Response time(ms): 1403, Network: 7, server: 639, browser: 727'.

...so now, if we go to the workflow....



...we see at the bottom of the Incident that a Task was created and assigned to System Administrator:

Incident INC0010924

Incident state: In progress
Opened by: System Administrator
Priority: 1 - Critical

Update Resolve Delete

Related Links
[Show SLA Timeline](#)
[Repair SLAs](#)

Task SLAs (2) Approvers (1) Incident Tasks Incident Tasks (1) Task Activities

Incident Tasks New Edit... Go to Number Search

Parent = INC0010924

Number	Priority	State	Assigned to	Short description
TASK0022504	1 - Critical	Open	System Administrator	Critical Incident Fulfiller

...and if we open the Task, we can close it as desired:

The screenshot shows a web interface for an 'Incident Task' with ID 'TASK0022504'. The form includes fields for Number, Assignment group, Assigned to, Configuration Item, Active (checkbox), Short description, Description, and Work notes. The State dropdown menu is open, showing options: Open, Pending, Open, Work in Progress, Closed complete (highlighted), Closed complete, and Closed Skipped. The Priority is set to '1 - Critical'. At the bottom, there are 'Update' and 'Delete' buttons.

Field	Value
Number	TASK0022504
Assignment group	SR_Approver group
Assigned to	System Administrator
Configuration Item	
Active	<input checked="" type="checkbox"/>
Short description	Critical Incident Fulfillment
Description	
Work notes	
Priority	1 - Critical
State	Closed complete

...which will also close the incident.