

Configuring

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Setting up workflows for external steps

After you create a step template to call an external program and tune the step template to run on the server that the external program is installed on, you add a step that is based on the step template to a workflow. You then assign the workflow to an input device, or use another method to assign the workflow to specific jobs.

To set up a workflow for an external step:

1. Click the **Workflow** tab.
2. Determine whether you can use a copy of an existing workflow or if you need a new workflow. Do one of these:
 - Right-click one of the workflows and select **Copy**. Name the copy of the workflow, fill in or edit other values that you need, and click **Continue**.
 - Click **Add** and specify a name and description for the new workflow.
3. To add the external step:
 1. In the workflow editor, click the side panel in the top right corner of the window.
 2. Go to **Steps** and use the quick search field to search for the external step.
 3. Click the external step and drag it into the workflow editor. Place the step where you want it.
 4. If you want to rename the step, right-click the step. Select **Properties**, and then click **General**. For the **Step name** property, type a name for the new step and click **OK**.
4. Edit the properties for processing behavior as needed.
5. Connect the step to other steps.

The external step can use conditional processing to receive a job from multiple steps and send it to multiple steps. You can attach rules with conditions to the connectors, and you can set job properties for different branches of the workflow by adding steps based on the **AssignJobValues** step template.
6. Add or update the other steps in the workflow if necessary. A workflow can contain more than one step that calls an external program.
7. Save and enable the workflow.
8. Test the external program.

Other topics in this section:

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[Setting up step templates for external steps](#)

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