

Configuring

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Creating a step chain

If you use the same set of connected steps in many of your workflows, you can create a step chain with those steps to use in your workflows.

To create a step chain:

- Create a step chain manually:
 1. Click the **Workflow** tab.
 2. In the left pane, click **Step Chains**.
 3. Click **Add**.
 4. Fill in values for all the required fields and click **CONTINUE**.
 5. In the step chain editor, add and connect the steps you want to use.
 6. To save the step chain, click the  menu in the upper right corner and select **Save step chain**.
 7. To exit the step chain editor, click the **X** in the upper right corner.
- Create a step chain from steps in an existing workflow
 1. Click the **Workflow** tab.
 2. In the left pane, click **Workflows**.
 3. Open the workflow that contains the steps you want to make into a step chain.
 4. Press the Shift key and drag your mouse to draw a box around the steps you want to include in the step chain.
 5. If you want to remove some steps from the selection or add other steps that cannot be included in the box, use **Ctrl click** or **Shift click** to deselect them.
 6. Right-click inside the box to bring up the context menu and select **Save as step chain**.
- Add an annotation to a step chain:
 1. Click the **Workflow** tab.
 2. In the left pane, click **Step Chains**.
 3. Click a step chain that you want to open.
 4. In the step chain editor, right-click and select **Add annotation** from the menu.
 5. Enter your comment and click the arrow icon to post the annotation.
The annotation is saved and visible on the workflow.
 6. To save the step chain, click the  menu in the upper right corner and select **Save step chain**.
 7. To exit the step chain editor, click the **X** in the upper right corner.

 **Note:**

- After you create a step chain and place it in a workflow, changes made to that step chain are not applied to the step chain in the workflow.

Parent topic: [Preparing to use workflows](#)