VALIDMIND

Working with workflows > Set up workflows

Set up model workflows

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Workflows can be configured to match your organizational needs for overseeing model development, validation, or implementation activities.

Default workflows are provided for you as suggestions. You can customize the following default workflows:

- **Model documentation:** When documentation is created
- **Inventory model:** When the model is created

Setting up your workflow involves two major steps:

1. Configuring workflow steps
2. Linking the workflow together

> **Adjustments to workflows are not retroactive.**
> When a workflow is edited, the new flow will only apply to new models created after the adjustment.

Prerequisites

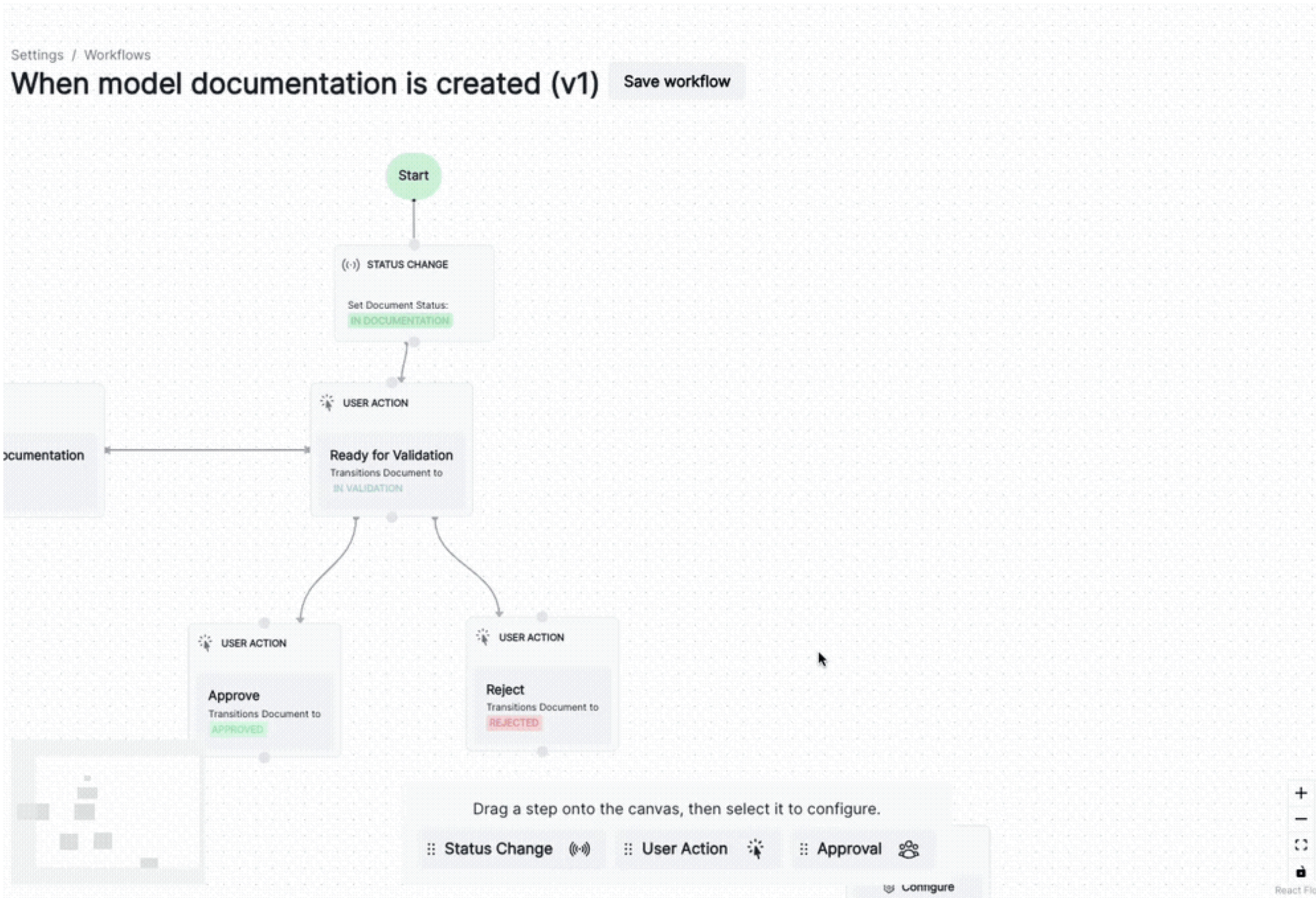
- To customize workflows, you must hold the `Customer Admin` or `Developer` role
- Resource statuses must be fully configured

Configure workflow steps

To add or edit workflow steps:

1. Log in to the ValidMind Platform UI.
2. In the left sidebar, click Settings.
3. Under Workplace Settings, select **Workflows**.
4. Under available workflows, select the process you'd like to add or edit the steps for:

    - To add a step, drag and drop a new step onto the canvas. Hover over the step until the ⋮ menu appears, then click on it and select ⚙ **Configure**.
    - To edit a step, hover over the step until the ⋮ menu appears. Then click on it and select ⚙ **Configure**.
5. After you're finished with step configuration, click **Save** to apply your changes before closing the configuration panel with **X**.



After you've configured a step, you can then link your workflow together.

> Refer to **Available step types** for information on available step types and details on how to set up conditional requirements.

Available step types

Status Change

- Transitions a status.
- Requires available resource statuses associated with the workflow.

Field	Description
When these conditions are met (optional)	Add conditional requirements to qualify for this step.

Field	Description
Set status to (required)	Select the status to transition to.

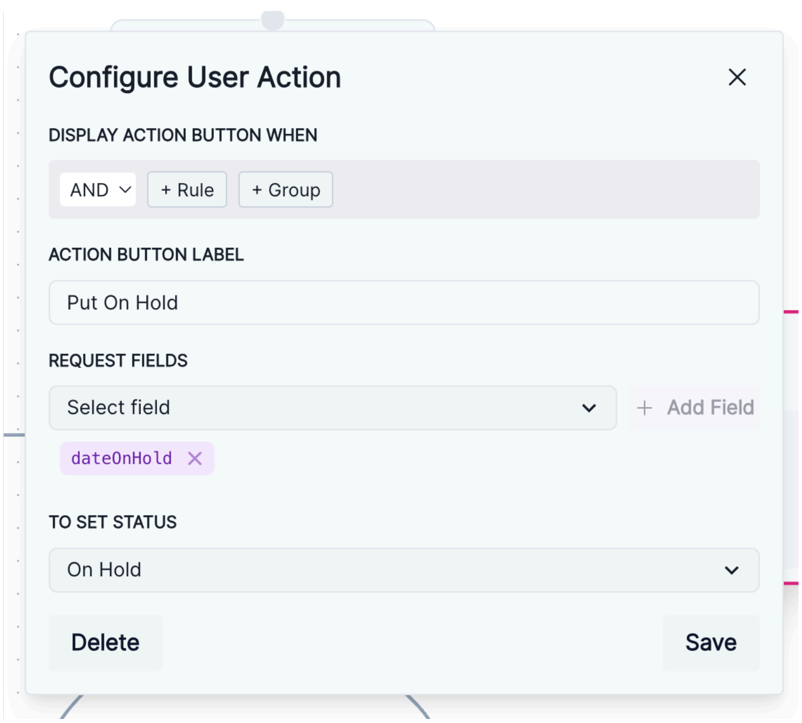
Status Change step configuration

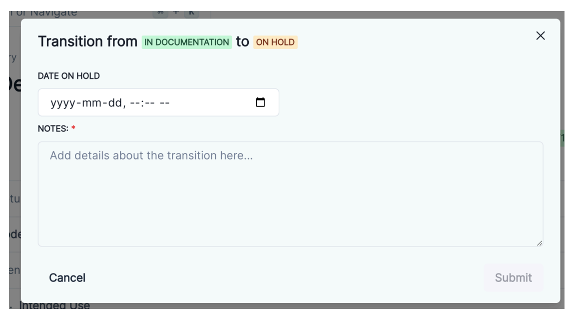
User Action

- Creates a button that performs an action on behalf of the user.
- Requires available resource statuses associated with the workflow.

Field	Description
Display action button when (optional)	Add conditional requirements for displaying this step.
Action button label (required)	Text that displays on your action button.
Request fields (optional)	Include custom fields alongside your action if desired. Select the field, then click **+ Add Field** to insert.
To set status (required)	Select the status to transition to.

User Action step configuration





Example
A `Put On Hold` action that requests a value in the Date On Hold field, and transitions the resource status to On Hold.

Approval

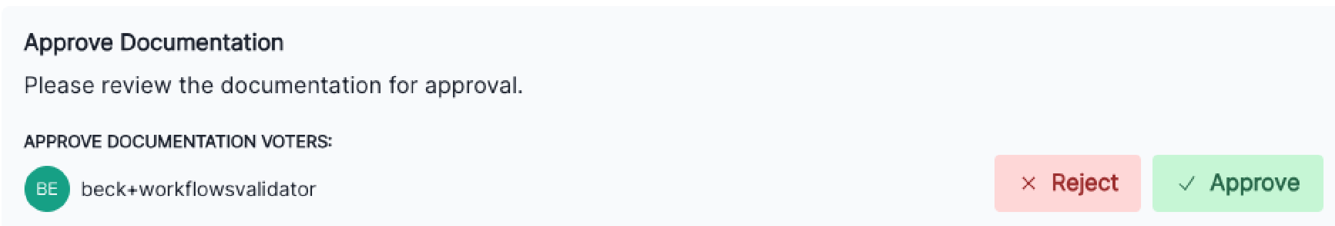
- When your resource reaches the approval step, users in the selected Approval Group will receive your configured message.

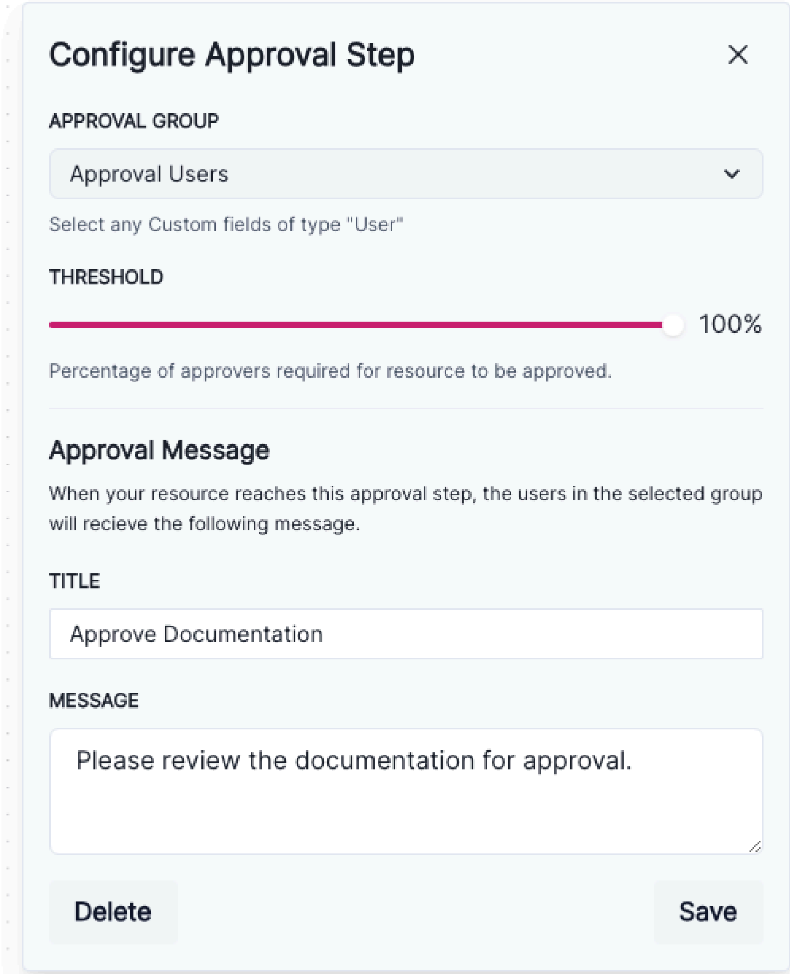
- Requires a User type custom field to select from, and must be connected to both an approval and rejection **Status Change** step.

> Please note that users must be assigned to the Approval Group custom field before it is transitioned into the **Approval** workflow step in order for the message to be displayed to them.

Field	Description
Approval group (required)	Select the User type custom field that indicates users responsible for approval.
Threshold (required)	Percentage of approvers required for the resource to be approved.
Approval Message (required)	When your resource reaches this approval step, the users in the selected group will recieve the following message.

Approval Group step configuration





Example
A message shown to the Approval Group users requesting approval of model documentation.

Add conditional requirements

Conditional requirements can be configured for all three available step types:

Step type	Conditional options
Status Change	Under `When these conditions are met`, you are able to set both `AND` and `OR` conditions.
User Action	Under `Display action button when`, you are able to set both `AND` and `OR` conditions.
Approval	Under `Threshold`, you are able to set the minimum percentage of approvers required for the resource to be approved.

Step type conditional options

For Status Change and User Action conditions, you're able to add a single independent **Rule** or a linked condition **Group**. These rules and groups can be nested if desired:

- Click **+ Rule** to add an independent rule.
- Click **+ Group** to add a linked group of rules that all must be true to qualify.

Link workflow together

To initiate the beginning of your workflow:

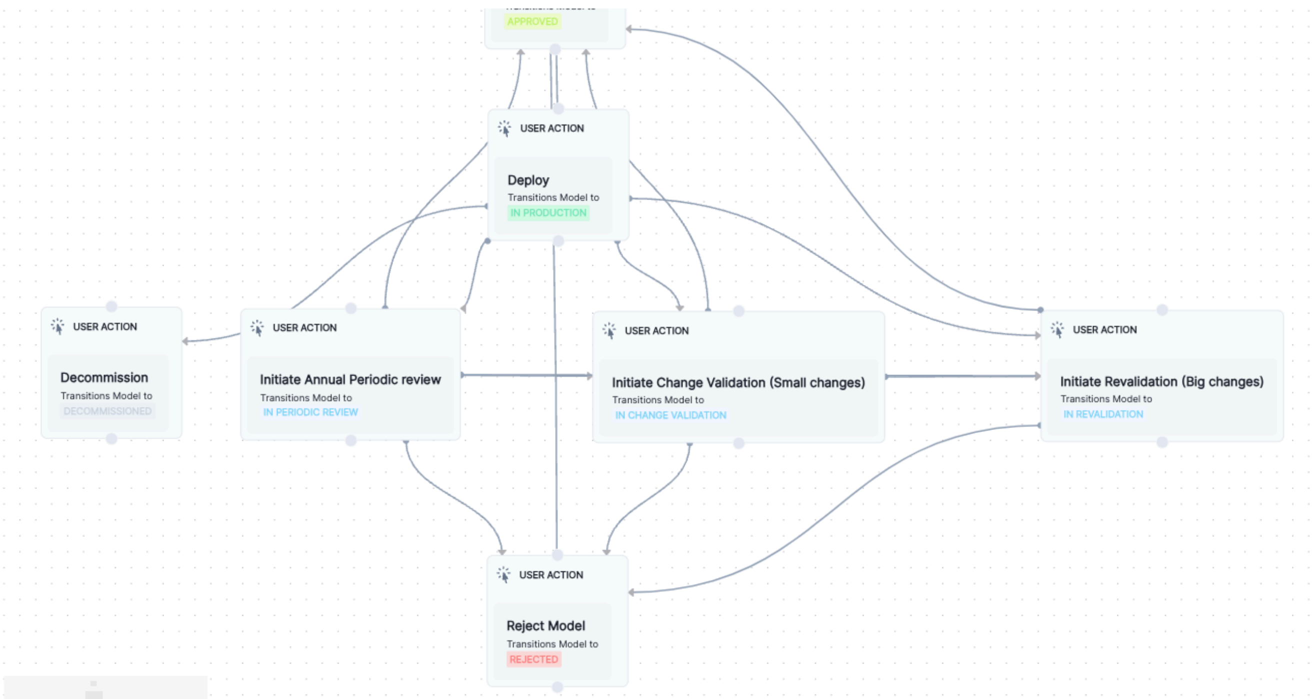
1. Locate the **Start** of your workflow.
2. Drag from the **.** at the bottom of **Start** to the top ⬤ on the first step of your workflow.

Link steps together

To link subsequent steps together:

1. Click ⬤ above or below the earlier step and drag it to connect to the top ⬤ on the subsequent step.

   You're also able to link several different steps together at various points in the workflow, including stages that may circle back to previous steps:



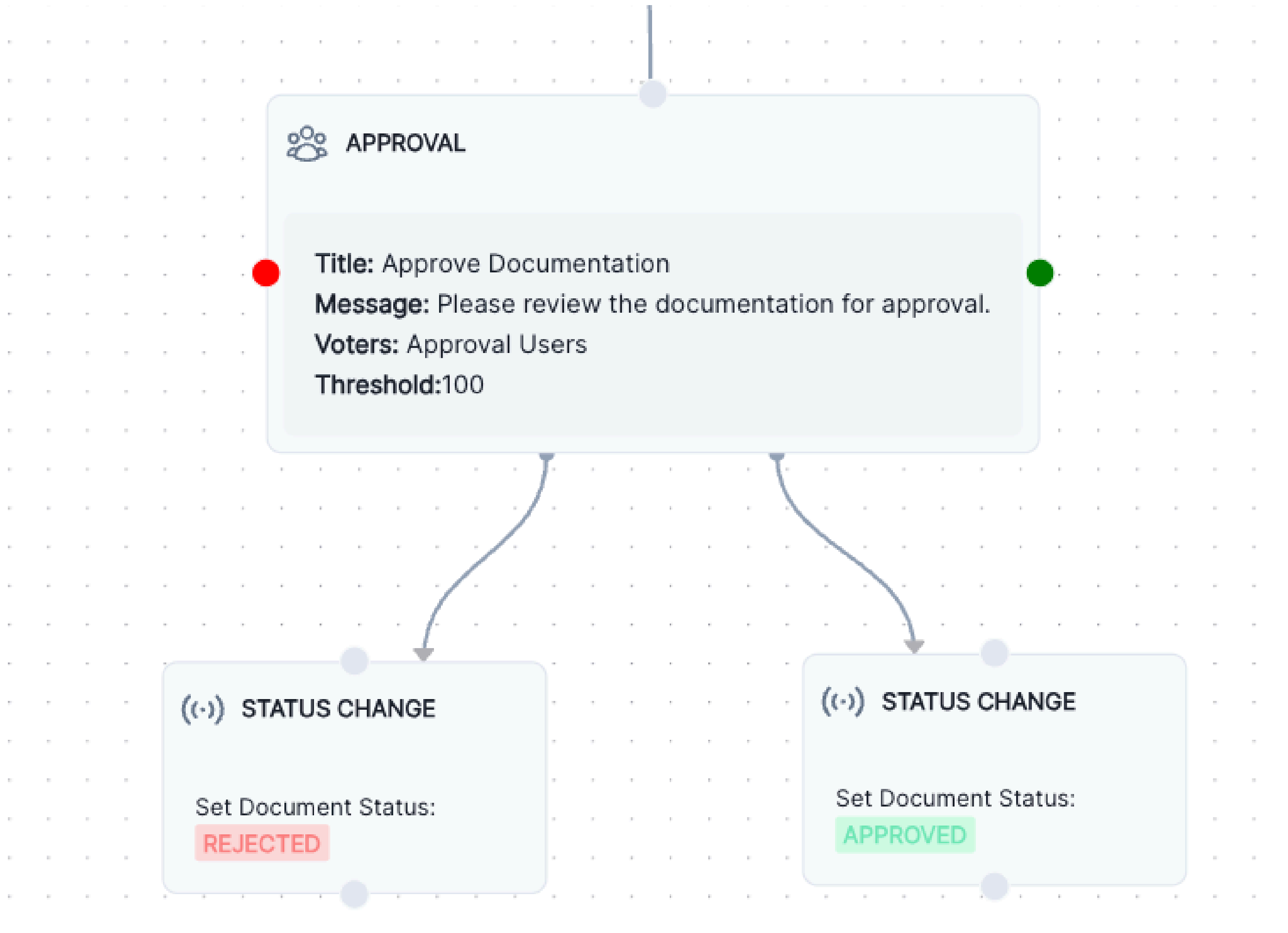
2. When you are finished, click **Save workflow** to apply your changes.

Link Approval steps

Approval steps need to be subsequently linked to both a Rejected and an Approval Status Change step:

1. First, configure an **Approval** step.
2. Then, drag two **Status Change** steps onto the canvas:
   - Assign a `Rejected` status to one in the Set Document Status field.
   - Assign an `Approved` status to the other in the Set Document Status field.

3. Connect the **Approval** step to the `Rejected` and `Approved` **Status Change** steps with the red and green ⚫ respectively by dragging from the colored ⚫ to the top ⚫ of the subsequent step.



Delete workflow steps

1. Hover over the step until the ⋮ menu appears, then click on it.

2. Select **Delete**:

    - A confirmation dialogue will appear. Select **OK** to continue.
    - The step will now be removed from the workflow.

3. When you are finished, click **Save workflow** to apply your changes.

Remove links between steps

1. Hover over a connection until the ⊗ appears.

2. Click ⊗ to delete the connection:

    - A confirmation dialogue will appear. Select **OK** to continue.
    - The connection will now be removed from the workflow.

3. When you are finished, click **Save workflow** to apply your changes.

What's next

- Workflows FAQ
- Register models in the inventory
- Working with model documentation