

# Behaviour: Workflow



by Jon Mulhern on 10 August 2018

infocapture, user guide, workflow

## Understanding Project Workflow

Project workflow may be used to restrict who is able to change the status, what they are allowed to change it to and at what point during the lifecycle of an issue.

Workflow is managed through tables, with the rows determining which Field Conditions to use, the columns determining which project roles they apply to, and the cells within the table determining what the new values can be.

It's a little similar to the tables used in Field Visibility - except instead of having "Allow/Deny/Not Set" in the cells, it is instead the allowed values of the form field.

## Example

This example table below lists the statuses each project role is permitted to change to, at each stage.

|                               | <b>Project Role:<br/>Admin</b> | <b>Project Role: Managers</b>              | <b>Project Role: Users</b> |
|-------------------------------|--------------------------------|--|----------------------------|
| <b>Status = New</b>           | All                            | Pending Info, Approved, Rejected, Canceled | Canceled                   |
| <b>Status = Pending Info</b>  | All                            | None                                       | Info Provided, Canceled    |
| <b>Status = Info Provided</b> | All                            | Pending Info, Approved, Rejected, Canceled | Canceled                   |
| <b>Status = Approved</b>      | All                            | Rejected, Canceled                         | Canceled                   |
| <b>Status = Rejected</b>      | All                            | Approved, Canceled                         | None                       |
| <b>Status = Canceled</b>      | All                            | None                                       | None                       |

In this table, the cells down the left column are field condition sets. The top row is my project roles.

Look at the row starting *Status = New*. I've got a field condition that says this should apply when the Status has reached 'New'.

If that's true, then I'm going to allow anyone in the admin role to change the status to anything else.

For anyone in the managers role, I'm going to allow them to move the status onto *Pending Info, Approved, Rejected, or Cancelled*.

And for anyone in the Users role, I'm only going to allow them to move the status to Canceled.

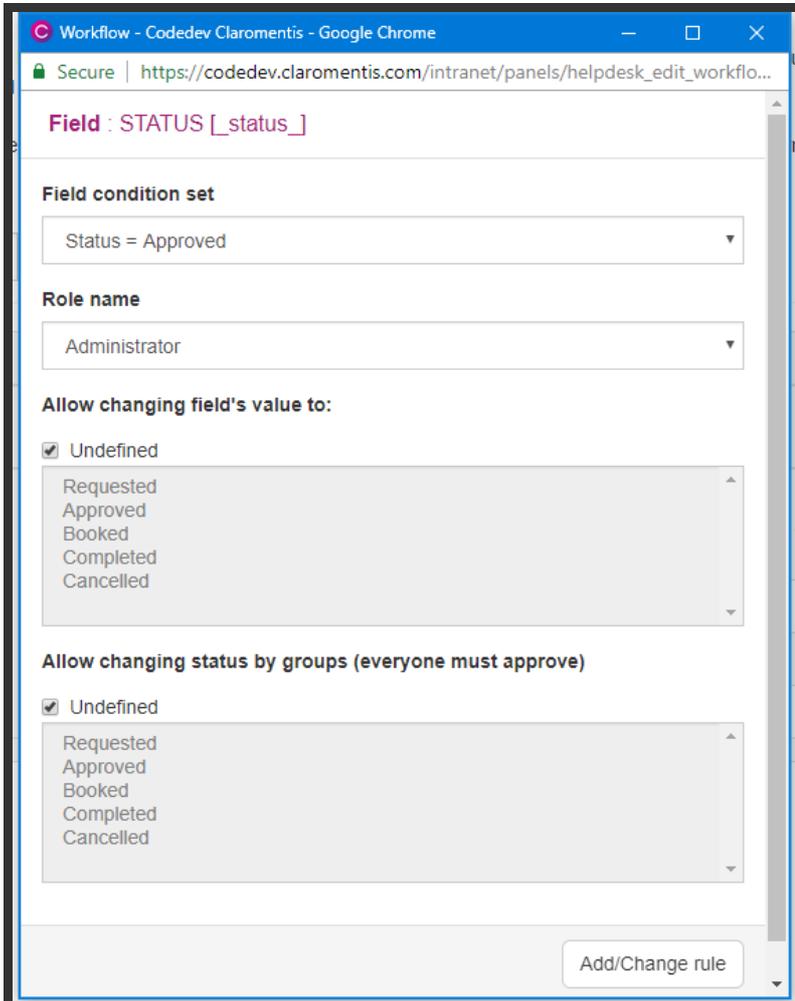
I then repeat this a further five times, one for each of the remaining statuses.

So I'm left with a table using six field conditions, one for each status.

# Adding a workflow

Go to *Admin > Infocapture > Your Project > Workflow*

From the dropdown list, select the form field you wish to control the options for. Note that STATUS and ASSIGNED TO are available options. Once selected, click *Add Rule For This Field*.



The screenshot shows a web browser window titled "Workflow - Codedev Claromentis - Google Chrome". The address bar shows the URL "https://codedev.claromentis.com/intranet/panels/helpdesk\_edit\_workflo...". The main content area is titled "Field : STATUS [\_status\_]". Below this, there are several configuration sections:

- Field condition set:** A dropdown menu showing "Status = Approved".
- Role name:** A dropdown menu showing "Administrator".
- Allow changing field's value to:** A section with a checked checkbox "Undefined" and a list of options: Requested, Approved, Booked, Completed, and Cancelled.
- Allow changing status by groups (everyone must approve):** A section with a checked checkbox "Undefined" and a list of options: Requested, Approved, Booked, Completed, and Cancelled.

At the bottom right of the form, there is a button labeled "Add/Change rule".

The available options:

**Field Condition Set:** Choose the Field Condition that should apply to the rule.

**Role name:** Pick the role to apply the rule to. It's likely that you'll need to go through each of the roles in this list separately, deciding for each what they should be allowed to do.

**Allow changing field's value to:** For the currently selected role, choose the options that should be allowed when this field condition applies. Hold the CTRL key to select multiple options.

**Allow changing status by groups:** Use this if you need more than one person to approve a change. See below for more information.

If you are adding a workflow rule to a user picker, such as the *Assigned To* field, you will need to pick individual users. However from version 8.5 (Sept 3rd 2018) onwards, you will be able to pick groups, roles, and project roles.

## Group approvals

|  |                     |  | Rights    |                            |                     |                  |
|--|---------------------|--|-----------|----------------------------|---------------------|------------------|
| Tickets fields, label [symname]                | Field condition set |  | User      | admin                      | Submitter of ticket | Handler of issue |
| STATUS <input type="text" value="..status.."/> | Status = Submitted  |  | Submitted | Billed<br>Received<br>Paid | Submitted           |                  |

This gives the following approval table on a submitted form:

Change status to

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**Status approvers**

| Status   | User          | State            | Approved         |
|----------|---------------|------------------|------------------|
| Billed   | Alan Metcalfe | -                |                  |
|          | Jon Mulhern   | refuse approving | 10-08-2018 12:58 |
|          | Julia Greene  | -                |                  |
| Received | Alan Metcalfe | -                |                  |
|          | Jon Mulhern   | refuse approving | 10-08-2018 12:59 |
|          | Julia Greene  | -                |                  |
| Paid     | Alan Metcalfe | -                |                  |
|          | Jon Mulhern   | approve          |                  |
|          | Julia Greene  | -                |                  |

You can see that there are three possible approvers in the role.

I have clicked 'Approve' on *Billed* and *Received* (which is why I am now given the option to 'refuse approving') but I have not given my approval for the status to move to *Paid*.

If Alan and Julia also come to the form and approve billed or received, the form will then automatically change status.

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