

## Configure Stage Transitions & Actions

This article provides instructions on configuring the workflow transition and action options for the following objects:

- Tickets;
- Incidents;
- Exceptions;
- Findings; and
- Policies.

A stage transition moves the process from the current stage to another stage. The transition is typically associated with a user action, such as approve or reject. For Assessment workflows, the transition can also have questionnaire taking conditions. The stage transition options display as buttons on the workflow page.

By default, a workflow uses at least two actions in each stage. Since you may not need two actions on all occasions for each workflow stage, you may want to use the following properties so that actions can be selected depending on the context of need.

PROPERTY	DESCRIPTION
<code>workflow.min.transitions=</code>	Enter a number which specifies the actions in the workflow stage. If this property value is not set, the default value is 2, meaning there must be at least two transitions for every non-terminal stage.
<code>workflow.max.transitions=</code>	Enter a number so that you will have the choice to select more transitions when needed. By default the value is 4, meaning there can be no more than four transitions for every non-terminal stage.

For example, if you need just one action in a workflow stage, you must set the `workflow.min.transition` property to 1 and `workflow.max.transitions` property to an appropriate value so that you can continue to select more actions in stages depending on the context of need.



Only users with **Workflow View** and **Workflow Update** permissions can modify workflows.



As of version 9.5, the `workflow.max.transitions` value for exception workflows will be the entered value plus 1. This extra transition will allow the workflow to expire.

### To configure a workflow's transitions and actions:

1. Click **Configuration > Workflows**.
2. Click a workflow on the grid to open the workflow settings. If needed, use the tree to the left or the filter dropdown menu on the far right to filter the results on the grid.

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Filter by: - Show all - Refresh

Type	Name	Stages
<input type="checkbox"/>	Exception	Alternate Template
<input type="checkbox"/>	Exception	Exception Workflow
<input type="checkbox"/>	Exception	Test Waiver

The Workflow settings in Configuration.

3. Click **Definition** in the pane to the left if it's not already selected.

Workflow Template Name Exception Workflow

1 Requested

**Stakeholders**

- Exception Requester/Reopener
- Primary Owner

**Actions**

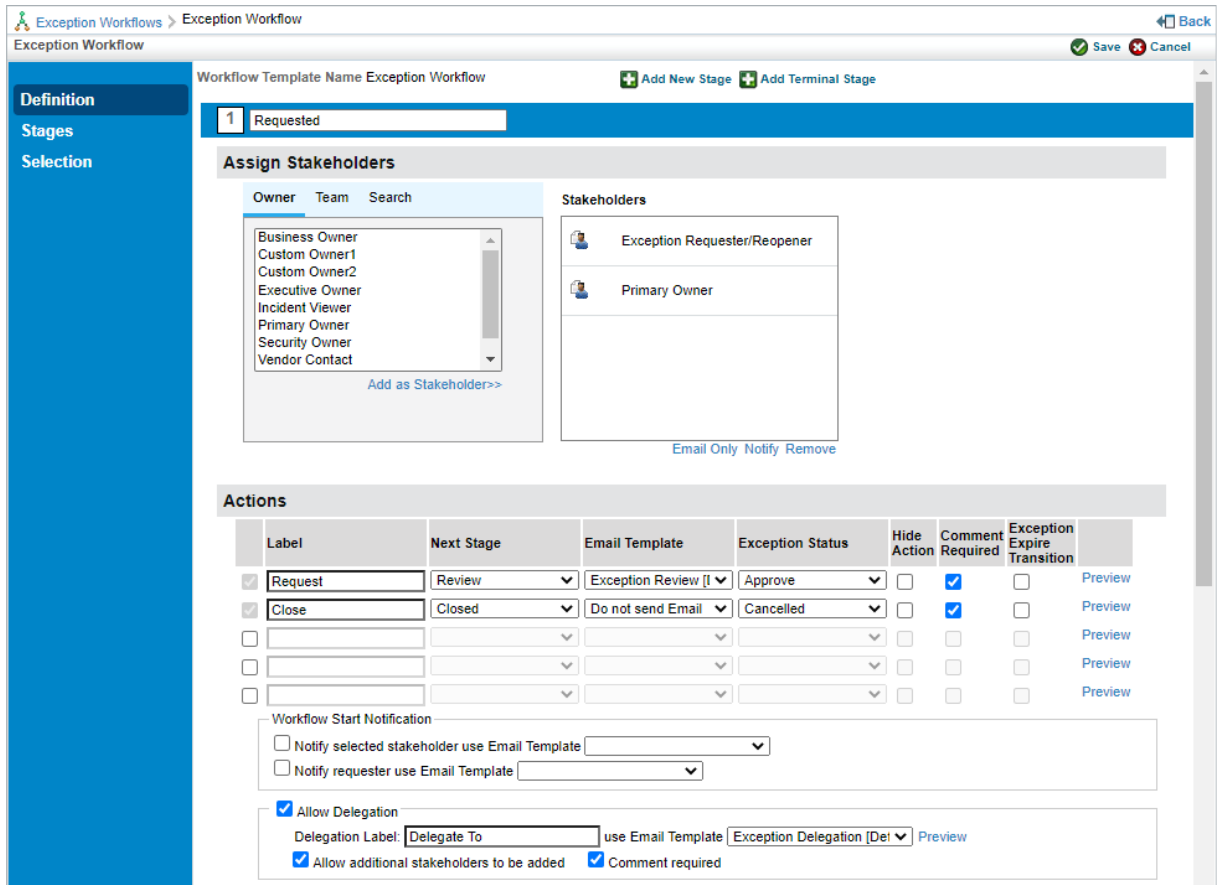
Label	Next Stage	Email Template	Exception Status	Hide Action	Comment Required	Exception Expire Transition
Request	Review	Exception Review [Default]	Approve	No	Yes	No
Close	Closed	Do not send Email	Cancelled	No	Yes	No
Delegate To		Exception Delegation [Default]			Yes	

**Options**

- Notify selected stakeholder
- Notify requester
- Allow additional stakeholders to be added
- Allow submitter/requester to make changes
- Notify by sending single email to all stakeholders
- Workflow advance to the next stage when any stakeholder performs the action

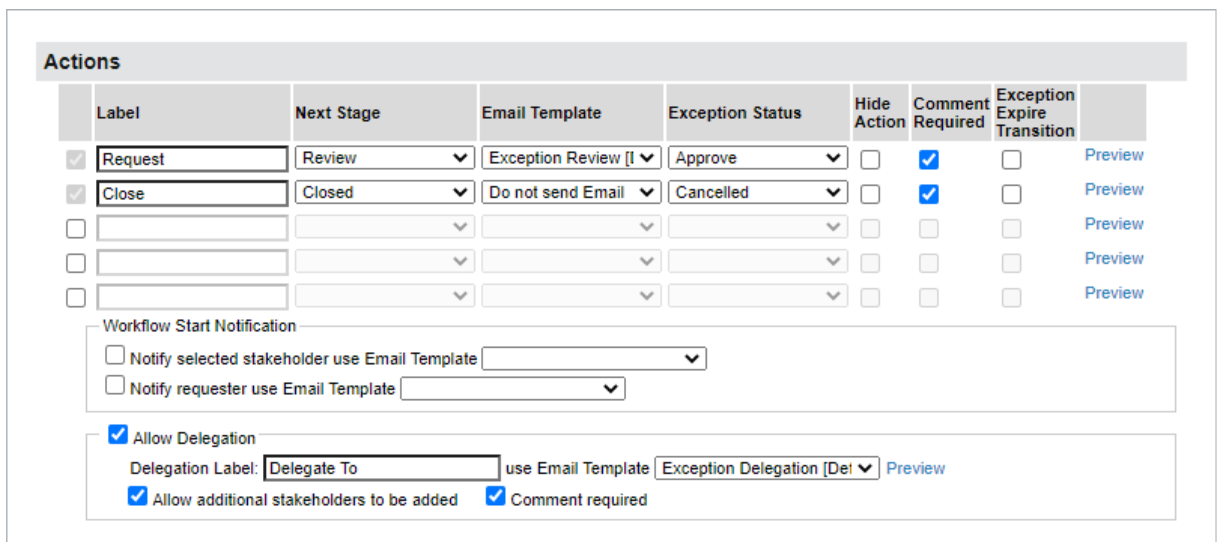
Workflow details.

4. Click **Edit** in the top-right of the workflow screen.



The Workflow edit screen.

- Click a stage to display its **Actions** settings.
- Enter a name for the stage in the **Label** text box. This is the label that will appear on the button that users click to move the object to another stage.



The Actions settings.

- Select the stage the object will transition to from the **Next Stage** dropdown menu.
- Optional:** Select a template to define which email is sent to stakeholders when the notify settings are enabled. If you do not want an email sent, select **Do not send Email**
- Enter a status for the object once it transitions in the **Status** field.



For exceptions, this field is a select list called the **Exception Status** field. Users will choose the appropriate status from a predefined list created on the [Exception Management Preferences](#) page. All other workflow types will have users enter in their own status values.

10. Select the **Hide Action** checkbox if the transition button should be hidden from end-users in the **Workflow** section of the object. This option is useful when the transition is automated and does not require any action from the user.
11. Deselect the **Comment Required** checkbox if the transition **does not** require end-users to enter comments in the **Workflow** tab before the object transitions. This checkbox is selected by default.

Exception Status	Hide Action	Comment Required	Exception Expire Transition	
Approve	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Preview
Cancelled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Preview
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preview
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preview
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preview

*The Hide Action and Comment Required checkboxes.*

12. **Optional:** Click **Preview** if you selected an email template in step 8 above and you wish to preview it.
13. Repeat steps 5 to 12 to modify the settings of additional stages as needed.
14. Click **Save** to save your changes.



Existing objects must be synchronized to reflect changes to the workflow settings. To synchronize, navigate to the objects (e.g. Home > Tickets) and select Synchronize Workflow from the More Actions... dropdown menu or open an individual object to synchronize it from the Workflow section.