## **Batch Workflow Transitions**

The Batch Workflow Transition action makes it possible for users to move multiple objects to another workflow state in bulk. Once objects have successfully transitioned, entries are recorded in each object's Workflow History, but a single entry is logged for each bulk-transition on the Events page in Administration. Depending on the application you're currently working in, these objects include:

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

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When using this action, note that:

- Up to 50 objects can be bulk-transitioned at one time.
- Only objects in the same stage from the same workflow can be transitioned in bulk, which are grouped and selected in the **By Stage** folder and its sub-folders. If needed, the workflow settings can be modified in **Configuration** > **Workflows**.
- If one or more objects cannot be transitioned due to an error, the transition will fail.
- Bulk transitions cannot be performed on closed or terminal objects. Reopening objects in bulk is not supported.
- Only users with View and Update permissions on the objects can perform this action.
- Attempting to batch transition the workflows of two different tickets in the same workflow state will return an error message.
- Including a ticket with no workflow in the batch transition will not return an error.

| Welcome Message Center Find  | lings Questionnair | Move Workflow  |          | ×   |      |      |          |              |
|------------------------------|--------------------|----------------|----------|-----|------|------|----------|--------------|
| Tickets —                    | New Tickets        |                |          |     |      |      |          |              |
| New Actions V                | 1-2 of 2           | Current Stage: | New      |     |      |      |          |              |
| E Wy Tickets                 | New Dataita        | Actions*:      | 0        | _   |      |      |          |              |
| My Undelegated Tickets       | New Details        | Actions .      | Accept   |     |      |      |          | Filt         |
| My Tickets Delegated To Othe | Ticket ID          |                | ◯ Reject |     | ties | Risk | Progress | Created Time |
| 🖃 👹 By Status                |                    |                |          |     | lies | RISK | Flogress | Created min  |
| Open Tickets                 | ✓ ТКТ01967         |                |          |     |      | N/A  | 0%       | 2019-08-13   |
| Closed Tickets               |                    |                |          |     |      | IN/A | 076      | 11:25:53     |
| By Stage                     | TKT00217           |                |          |     |      | N/A  | 0%       | 2019-07-25   |
| New                          |                    |                |          |     |      |      | 0%       | 15:44:14     |
| Review                       |                    |                |          |     |      |      |          |              |
| 🗄 👹 Ву Туре                  |                    |                |          |     |      |      |          |              |
|                              |                    | Comments:      |          |     |      |      |          |              |
|                              |                    | Comments:      |          | - T |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |
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|                              |                    |                | Can      |     |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |
|                              |                    |                |          |     |      |      |          |              |

The Move Workflow window, which allows you to transition multiple objects at once.

Batch workflow transitioning supports the use of the Groovy programming languaglf. you wish to use Groovy for bulk-transitioning workflows, contact Resolver Services.

In order to support batch workflow transitioning, users upgrading to RiskVision version 9.3 or higher must include the following method signature in the **DetailPane** Groovy file of the desired object: public boolean isTransitionActionAllowedForBatch(String transitionAction, String toStage, boolean forceTransition, List payloads).

In addition, any Groovy customization files that implemen PayloadScriptAction must provide implementation for isTransitionActionAllowedForBatch() in the **DetailPane** Groovy file.



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Groovy can be used to automatically set th**End Date** field based on any conditions when the ticket moves from one stage to another. For example, if the ticket's risk is **High**, the **End Date** can be set to increase by two days. If it**Msdium**, it can be set to increase by ten days. If it is **Low**, it can be set to increase by 20 days.

If any format is missing in Groovy, RiskVision will not be able to upload it.

## To bulk-transition objects:

- 1. Click **Home**, then navigate to the object you wish to perform the action on (i.e., **Findings**, **Tickets**, **Exceptions**, or **Incidents**).
- 2. Click the + icon beside the **By Stage** folder in the tree view to display its sub-folders.

| 🔹 Tickets                    | _              | By Stage Tickets |                     |     |
|------------------------------|----------------|------------------|---------------------|-----|
| By Stage                     | Actions 🗸      | 1-4 of 4         |                     |     |
| My Tickets     My Undelegate | d Tickets      | New Details      | Delete More Actions | •   |
| My Tickets Del<br>By Status  | egated To Othe | Ticket ID        | Title               | Sta |
| Closed Tick                  |                | П ТКТ00003       | T4                  | Nev |
| 🕀 📑 By Stage<br>🕀 🧧 By Type  |                | TKT00002         | Т3                  | Nev |
| All Tickets                  | d Tickets      | П ТКТ00001       | T2                  | Nev |
| All Delegated T              | lickets        | П ТКТ00000       | T1                  | Nev |
| 🚽 🔡 By Type                  |                |                  |                     |     |

The By Stage folder in the tree view.

- 3. Click a sub-folder under **By Stage** to display objects in the grid based on their current stage.
- 4. Select the checkboxes beside the appropriate objects or select the checkbox in the far-left of the grid's header to select all objects.

| 🚯 Tickets —                           | 🔹 New Tickets   |             |        |                              |        |                       |          |      |          |                        |                   |                             |
|---------------------------------------|-----------------|-------------|--------|------------------------------|--------|-----------------------|----------|------|----------|------------------------|-------------------|-----------------------------|
| New Actions V                         | 1-2 of 2        |             |        |                              |        |                       |          |      |          |                        |                   |                             |
| My Tickets     My Undelegated Tickets | New Details     | More Action | 1S     | -                            |        |                       |          |      |          | Filter b               | y - Show all -    | <ul> <li>Refresh</li> </ul> |
| My Tickets Delegated To Othe          | Ticket ID       | Title       | Status | Туре                         | Owner  | Awaiting<br>Action By | Entities | Risk | Progress | Created Time           | In Stage<br>Since | Workflow<br>Name            |
| Open Tickets                          | TKT00001        | vsf         | New    | Entity Control<br>Resolution | Pass 8 | ď                     | N/A      | N/A  | 0%       | 2019-08-27<br>19:55:35 | 2019-08-27        | Default Ticket<br>Workflow  |
| By Stage                              | <b>TKT00000</b> | vdf         | New    | Entity Control<br>Resolution | Pass 8 | ď                     | N/A      | N/A  | 0%       | 2019-08-27<br>19:55:21 | 2019-08-27        | Default Ticket<br>Workflow  |
| 🗄 📒 Ву Туре                           |                 |             |        |                              |        |                       |          |      |          |                        |                   |                             |

Selected objects in the New sub-folder.



A maximum of 50 objects can be selected for a single bulk transition. Closed objects cannot be selected.

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 Click the More Actions... dropdown menu, then click Batch Workflow Transition to display the Move Workflow window.

| 🔹 New Tickets |   |  |  |  |  |
|---------------|---|--|--|--|--|
| 1-2 of 2      |   |  |  |  |  |
| New Details   | More Actions  |  |  |  |  |
| Ticket ID     | More Actions<br>Batch Edit Tickets<br>Delegate        |  |  |  |  |
| ✓ TKT00001    | Batch Workflow Transition<br>Save as CSV<br>Customize |  |  |  |  |
| ✓ TKT00000    | vdf New   |  |  |  |  |

The Batch Workflow Transition option in the More Actions... dropdown menu.

- 6. Select an option in the **Actions** section to transition the objects to another state.
- 7. Enter any notes in the **Comments** text box as required.

| Move Workflow      | 2  |
|--------------------|--|
| Current Stage:     | New  |
| Actions*:          | <ul> <li>Accept</li> <li>Reject</li> </ul> |
|                    |  |
|                    |  |
| Comments:          |  |
| Ticket is accepted |  |
|                    |  |
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The Move Workflow window.

- 8. Click **OK** to complete the transition and refresh your browser to see your changes.