

Adding a Condition to a Transition

Last Modified on 02/19/2025 10:17 am EST

Overview

A **Condition** controls an object's movement to different states or performs a specific action. A **Condition** consists of fields, formulas, and workflow states that create a formula. The formula uses a set of parameters to control whether a transition or action can occur.

Related Information/Setup

For more information on formulas, see the following articles:

- [Formulas Overview](#)
- [Variables, Operators & Functions](#)
- [Null Values in Formulas](#)
- [Formula Examples](#)

Before adding a Condition to a Transition, you must create a State and a Trigger. See the following articles for more information on creating States and Triggers.

- [Create a New State](#)
 - [Add a Trigger and Transition to a State](#)
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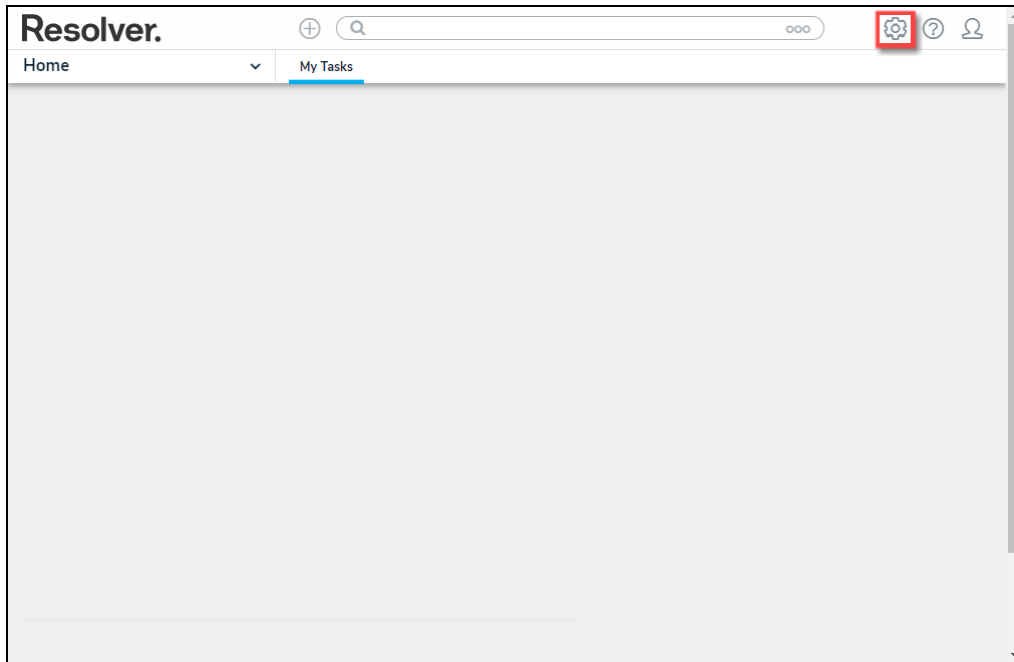
Example

The following example outlines an everyday scenario where you would want to add a condition to a transition.

Your company's policy for severe incidents is to skip the typical review process and transition to the investigation stage. Create a Condition on the Incident object type workflow for the **Submit for Review** trigger. If the "Severe" option is selected. The object is automatically transitioned to the **Investigation Required** state once the **Submit for Review** trigger is selected on a form.

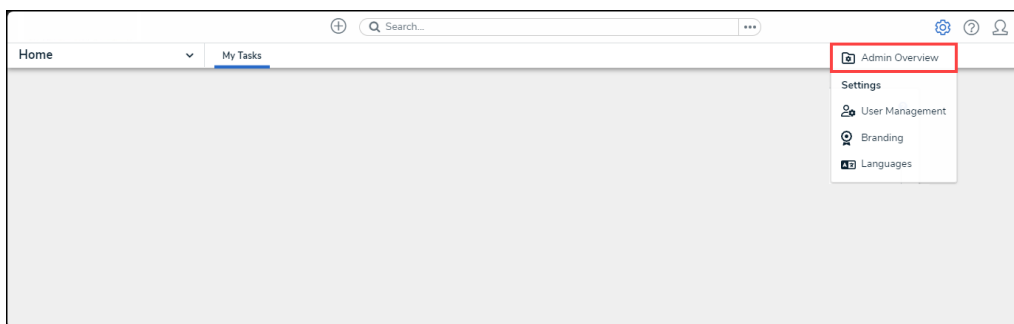
Navigation

1. From the **Home** screen, click the **Administration** icon.



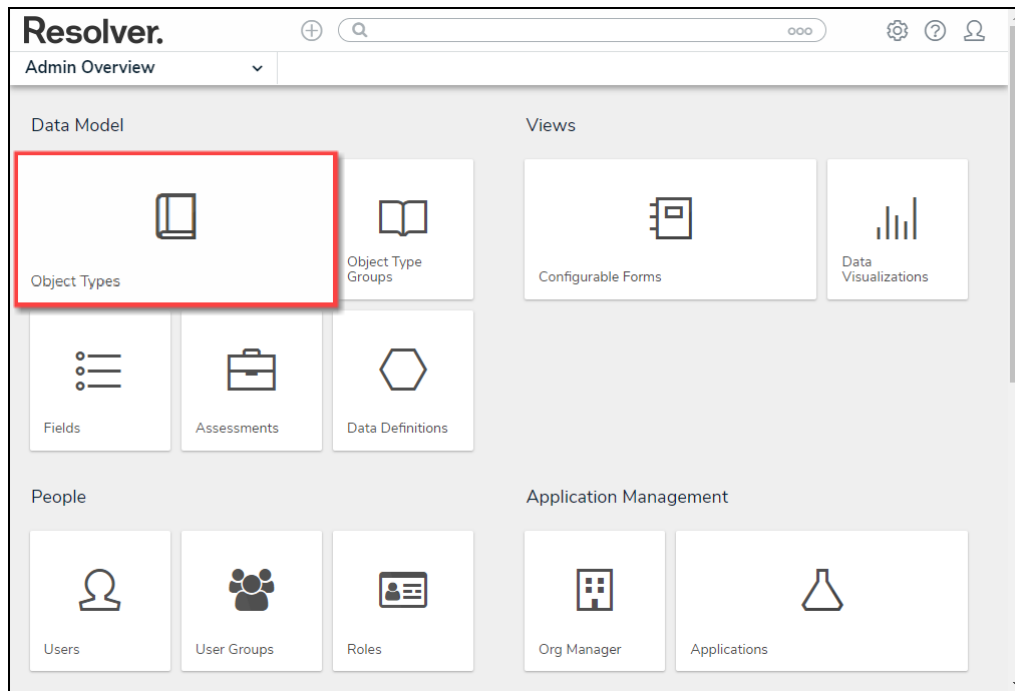
Administration Icon

2. From the **Administration Settings** menu, click the **Admin: Overview** link.



Admin: Overview Link

3. From the **Admin Overview** screen, click the **Object Types** tile on the **Data Models** section.



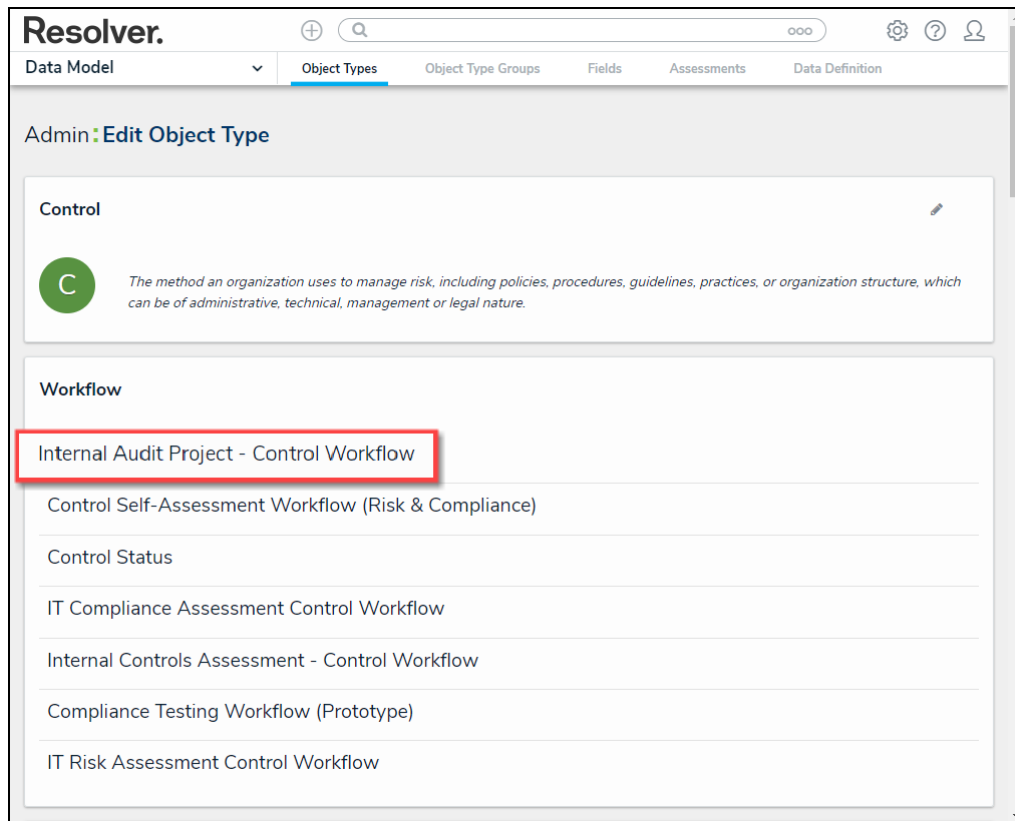
Object Types Tile

4. From the **Object Types** screen, enter an **Object Type Name** in the **Search** field to narrow down the list.
5. Click the **Object Type's Name** you want to edit.

The screenshot shows the Resolver Admin interface. At the top, there's a navigation bar with the Resolver logo, a search bar, and several icons. Below the navigation bar, there's a tabbed interface with 'Object Types' selected. The main content area is titled 'Admin: Object Types' and includes a '+ CREATE OBJECT TYPE' button. A search bar contains the text 'Control'. Below the search bar, a list of object types is displayed: Business Unit, Certification, Control, Market, Region, Request, and Test. The 'Control' object type is highlighted with a red box. The description for 'Control' reads: 'The method an organization uses to manage risk, including policies, procedures, guidelines, practices, or organization structure, which can be of administrative, technical, management or legal nature.'

Click the Object Type's Name

- From the **Edit Object Type** screen, click on a workflow under the **Workflow** section.



Click on a Workflow

- If there are no workflows listed, click on the **Configure Workflow** button.



Configure Workflow Button

- From the **Edit Workflow** screen, click a **Trigger** under the **State** section.



Note:

You must already have a **Trigger** added to a **State** before you can add a condition to a transition.

Resolver. [Search] [Settings] [Help] [User]

Data Model | **Object Types** | Object Type Groups | Fields | Assessments | Data Definition

Admin: **Edit Workflow**

Internal Audit Project - Control Workflow [Edit]

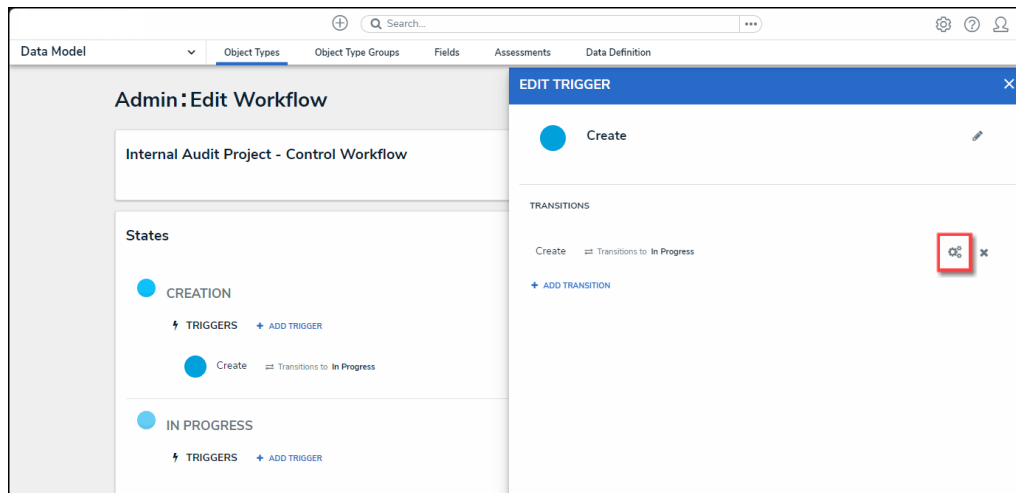
States [ADD STATE]

- CREATION**
 - ⚡ TRIGGERS [ADD TRIGGER] **CREATION STATE** 0 REQUIRED COMPONENTS
 - Create** → Transitions to **In Progress**
- IN PROGRESS**
 - ⚡ TRIGGERS [ADD TRIGGER] 0 REQUIRED COMPONENTS
 - Complete → Transitions to **Complete**
- COMPLETE**
 - ⚡ TRIGGERS [ADD TRIGGER] 0 REQUIRED COMPONENTS
 - OE: Archive (from Audit Project) → Transitions to **Archive**
 - Send Back to In Progress → Transitions to **In Progress**
 - [SHOW MORE...]
- ARCHIVE**
 - ⚡ TRIGGERS [ADD TRIGGER] 0 REQUIRED COMPONENTS
 - This State has no Triggers*

[DONE]

Click on a Trigger

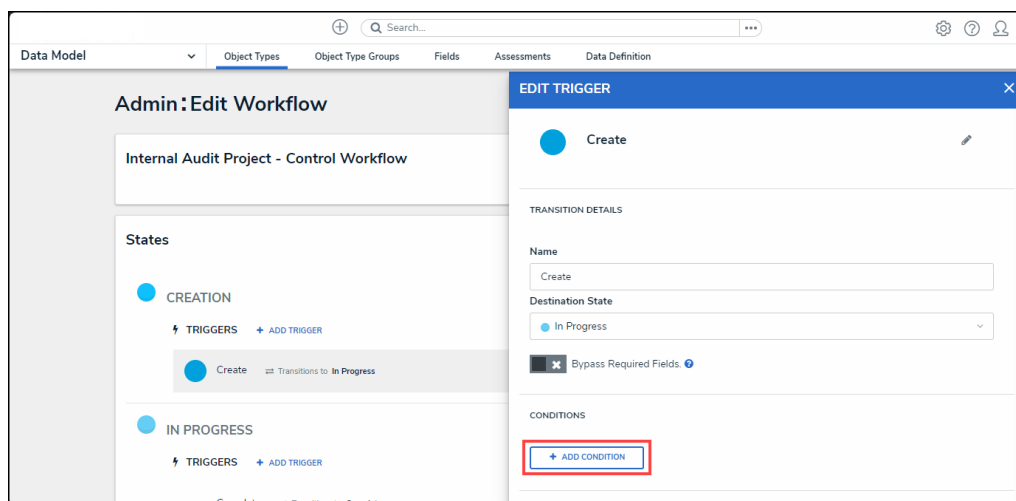
- From the **Edit Trigger** pop-up, click the **Edit** icon next to the transition.



Click the Edit Icon

Adding a Condition on a Transition

1. From the **Condition** section, click the **+Add Condition** button.



+ Add Conditions Button

2. **(Optional)** Enter a condition name in the **Name** field under the **Details** section. By default, conditions are named **Default Condition Formula**.

The screenshot shows the 'Admin:Edit Workflow' interface for 'Internal Audit Project - Control Workflow'. On the left, there are two states: 'CREATION' and 'IN PROGRESS'. The 'EDIT TRIGGER' panel on the right has sections for 'CONDITIONS', 'DETAILS', and 'VARIABLES'. In the 'DETAILS' section, the '* Name' field is highlighted with a red box. Below it is a 'Description' text area. At the bottom of the 'VARIABLES' section is a '+ ADD VARIABLE' button.

Name Field

3. **(Optional)** Enter a brief condition description in the **Description** field.

This screenshot is similar to the previous one, but the 'Description' text area in the 'DETAILS' section of the 'EDIT TRIGGER' panel is now highlighted with a red box.

Description Field

4. From the **Variables** section, click the **+Add Variable** button.

This screenshot shows the 'EDIT TRIGGER' panel with the '+ ADD VARIABLE' button in the 'VARIABLES' section highlighted with a red box.

+Add Variable Button

5. From the **Variables** section, select a **Variable Type** from the drop-down list. A **Variable** is a value in which the formula calculations are performed.

- **Field:** After selecting the **Field** variable, the following field will appear:
 - **Available Components:** Select a field or formula from the **Available Components** drop-down field adding it directly to the Object Type.



Note:

Fields must be added to a formula after an Object Type or through an association (Relationship or Reference).

Only numeric fields, date fields, and select lists (numeric values) are accepted. For more information, see the [Fields](#) article.

Variable Type = Field

- **Relationship:** After selecting the **Relationship** variable, the following fields will appear:
 - **Relationship:** Select the Object Type **Relationship** from the drop-down list. Relationships connect two or more objects. Relationships must be added to an Object Type to appear on the Relationship drop-down list. See the [Add Relationships to an Object Type](#) article for further information on adding a Relationship to an Object Type.
 - **Available Components:** Select a field or formula from the **Available Components** drop-down field adding it directly to the Object Type.
 - **Sub Type:** Select a **Sub Type** from the drop-down list. Subtypes specify how the data from multiple objects are compiled, calculated, and displayed. For more information on Subtypes, see the Sub Type Table in the [Variables, Operations, & Functions](#) article.

- **Array:** Creates a set of values from the variable.
- **Sum:** Calculates a total from the variable's set of values and returns a single number. Select list variables cannot use Sum Sub Types.
- **Count:** The number of times a variable has been added to an object.
- **Average:** Calculates an average number from the variable's set of values. Select list variables cannot use Average Sub Types.
- **Every:** Checks if the variable contains a value on the objects in the relationship/reference.
- **Min:** Calculates the lowest number from the variable's set of values. Select list variables cannot use Min Sub Types.
- **Max:** Calculates the highest number from the variable's set of values. Select list variables cannot use Max Sub Types.

Variable Type = Relationship

- **Reference:** After selecting the **Reference** variable, the following fields will appear:
 - **Reference:** Select the Object Type **Reference** from the drop-down list. References indicate that an object is connected to another object through a relationship. References are automatically created when a relationship is created. For further information on adding a Relationship to an Object Type, see the [Add References to an Object Type](#) article.
 - **Available Components:** Select a field or formula from the **Available Components** drop-down field adding it directly to the Object Type.
 - **Sub Type:** Select a **Sub Type** from the drop-down list. Subtypes specify how the data from multiple objects are compiled, calculated, and displayed.

The screenshot shows the 'Admin:Edit Workflow' page for 'Internal Audit Project - Control Workflow'. The 'EDIT TRIGGER' modal is open, and the 'VARIABLES' section is highlighted with a red box. In this section, the '* Variable Type' dropdown is set to 'Reference'. Other fields include '* Reference' (a dropdown), '* Available Components' (a dropdown), 'Sub Type' (a dropdown), '* Name' (a text field), 'Description' (a text field), and a checkbox for 'Treat empty values as Null'. The modal has 'CANCEL' and 'CREATE' buttons at the bottom right.

Variable Type = Reference

- **Property:** After selecting the **Property** variable, the following field will appear:
 - **Property:** Select a **Property** type from the drop-down list:
 - **Is Submitter Confidential:** This property type creates a formula that compares the number of confidential submissions against the number of not confidential submissions for customers that use the **Confidential Reporting Portal**.

This screenshot is similar to the previous one, but the '* Variable Type' dropdown in the 'EDIT TRIGGER' modal is now set to 'Property'. The '* Property' dropdown is also visible next to it. The rest of the interface and the red box highlighting the 'VARIABLES' section remain the same.

Variable Type = Property

6. The system will automatically populate the Name field with the field or formula's unique ID by default.
7. **(Optional)** Enter a Variable name in the **Name** field.



Warning:

Using a function name (Sub Type Name) in the name field will cause an error.

Variable Name

8. **(Optional)** Enter a Variable description in the **Description** field.

Description Field

9. **(Optional)** Select the **Treat empty values as Null** checkbox, to exclude blank objects from a formula calculation. For more information, see the [Null Values in Formulas](#) article.

Treat Empty Value as Null Checkbox

10. Click the **Create** button to add the variable.

The screenshot shows the 'Admin: Edit Workflow' interface. On the left, there's a sidebar with 'Internal Audit Project - Control Workflow' and 'States' (CREATION, IN PROGRESS). The main area shows 'TRIGGERS' with a '+ ADD TRIGGER' button. A modal titled 'EDIT TRIGGER' is open on the right. It contains the following fields:

- *Variable Type: Field
- *Available Components: Control Type
- *Name: TYPEOFCONT
- Description: (empty)
- ☐ Treat empty values as Null

 At the bottom right of the modal, there are 'CANCEL' and 'CREATE' buttons. The 'CREATE' button is highlighted with a red box.

Create Button

11. Repeat steps 7 - 16 to add additional variables.
12. Click the **x** icon next to the variable to delete the variable.

The screenshot shows the 'Admin: Edit Workflow' interface. On the left, there's a sidebar with 'Internal Audit Project - Control Workflow' and 'States' (CREATION, IN PROGRESS). The main area shows 'TRIGGERS' with a '+ ADD TRIGGER' button. A modal titled 'EDIT TRIGGER' is open on the right. It contains the following fields:

- *Variable Type: Select one...
- *Name: (empty)
- Description: (empty)
- ☐ Treat empty values as Null

 At the bottom right of the modal, there are 'CANCEL' and 'CREATE' buttons. Below these, the variable 'TYPEOFCONT' is listed with the details 'Field: Control Type' and 'Treat empty values as null: false'. A red 'X' icon is highlighted next to the variable name.

X Icon - Delete a Variable

13. **(Optional)** Click the **Insert Variable** button and select a variable from the dropdown list to use within the **Formula** field.

The screenshot shows the 'Admin: Edit Workflow' interface. On the left, there's a sidebar with 'Internal Audit Project - Control Workflow' and 'States' (CREATION, IN PROGRESS). The main area shows 'TRIGGERS' with a '+ ADD TRIGGER' button. A modal titled 'EDIT TRIGGER' is open on the right. It contains the following fields:

- *Variable Type: Select one...
- *Name: (empty)
- Description: (empty)
- ☐ Treat empty values as Null

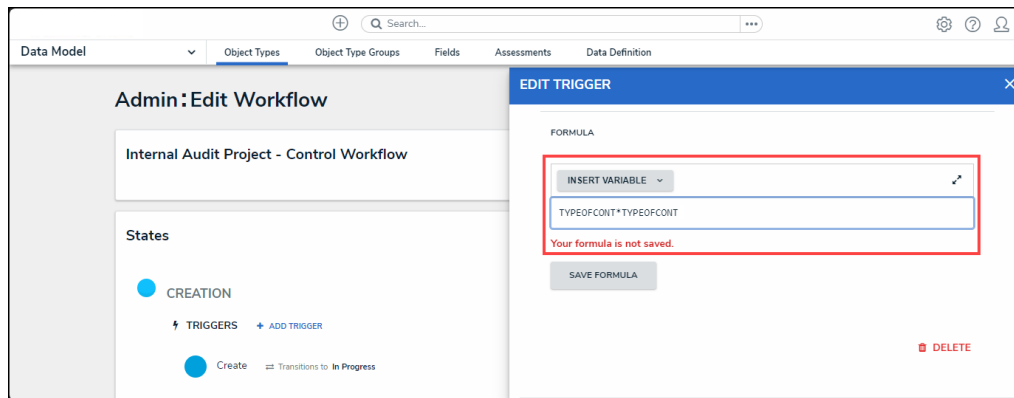
 At the bottom right of the modal, there are 'CANCEL' and 'CREATE' buttons. Below these, the variable 'TYPEOFCONT' is listed with the details 'Field: Control Type' and 'Treat empty values as null: false'. A red 'X' icon is highlighted next to the variable name. In the 'FORMULA' section, there is a text input field with 'TYPEOFCONT' entered. Above this field is an 'INSERT VARIABLE' button, which is highlighted with a red box.

Insert Variable Button

14. From the **Formula** section, enter a **Formula** using the variable name(s) you entered in the

Name field under the **Variables** section. Include operators and functions in the **Formula** field (e.g., **INCIDENTSE==3**). For more information on Operators, see the Operators Table in the [Variables, Operators, & Functions](#) article.

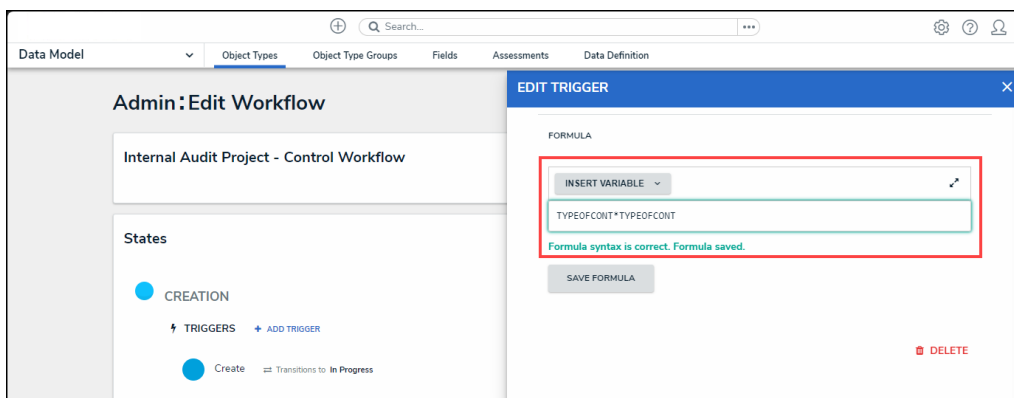
15. A system notification will appear under the **Formula** field, indicating that **Your formula is not saved.**



System Notification - Your Formula is Not Saved

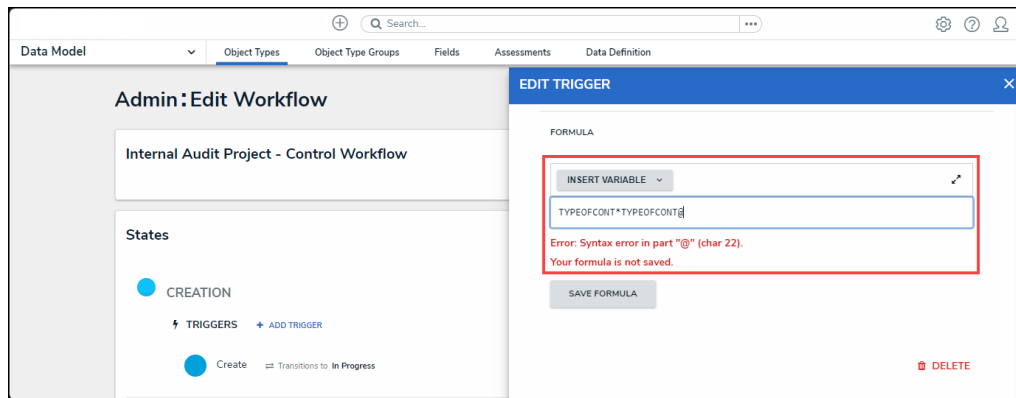
16. Click on the **Save Formula** button. The system will perform a Syntax Validation on the formula if the formula is:

- **Valid:** A system notification will appear under the **Formula** field; **Formula syntax is correct. Formula saved.**



System Notification - Valid Formula

- **Invalid:** A system notification will appear under the **Formula** field; **Error Syntax error in part (char 1). The formula is not saved.** The error will indicate the character (char) location of the error in the formula and that the formula is invalid and not saved.



System Notification - Invalid Formula

17. Syntax Validation helps to prevent users from saving invalid formula expressions, which can negatively impact APIs.
18. Click the **Done** button to add the Variables to the Object Type.