

Enable Workflow Control on a Form

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Workflow Control should almost always be turned on as it increases the visibility of workflow states and gives you consistent and easy access to transitioning workflows, as it shows triggers right away.

However, you have the option to use the [Workflow Triggers](#) buttons on the bottom of the screen, in addition to the workflow controls on the form. The limitation of that feature is that sometimes the trigger buttons are not available right away on the form (e.g., they may have conditional logic needing formula calculations).

To Enable Workflow Control

1. When [configuring a standard form header](#), click the **Object Name** (e.g., Risk Assessment) on the top left in the form header to view the available triggers in the dropdown (allows you to move the object to the next state).
2. **Optional:** If Conditional Logic Trigger settings exist:
 - a. In the **Admin: Object Types** menu, select the relevant object type (e.g., Risk).
 - b. In the **Admin: Edit Object Type** menu, select the relevant Workflow (e.g., Risk Assessment – Risk Workflow).
 - c. In the **Admin: Edit Workflow** menu, select the relevant State (e.g., Risk Assessment). This is where you can see the existing triggers (e.g., Submit for Review, Escalate Risk).
 - d. Click the relevant trigger to open the **Edit Trigger** right-side palette.
 - e. Under the Type field, click the **Show in Workflow Control** toggle to enable it and therefore bypass any conditional logic requirements that may prevent the Trigger from appearing on the form.

EDIT TRIGGER

Type

Button

✓

Show in Workflow Control

Name

Create

Description

Creation to Assessment Only

Color

Icon

DELETE

DONE

TRANSITIONS

Create

⇌ Transitions to Assessment Only

+ ADD TRANSITION

Workflow Control in the Edit Trigger Section.