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This article applies to the following:
Product Version: IssueNet All Versions
Component(s): Administrator
Solutions(s): All

Implementing Execute Workflow Actions on Issue Submission

When an issue is submitted into an IssueNet database, it is necessary to execute a workflow to generate tasks required to resolve the issue. This process can be automated by leveraging an Execute Workflow Action.

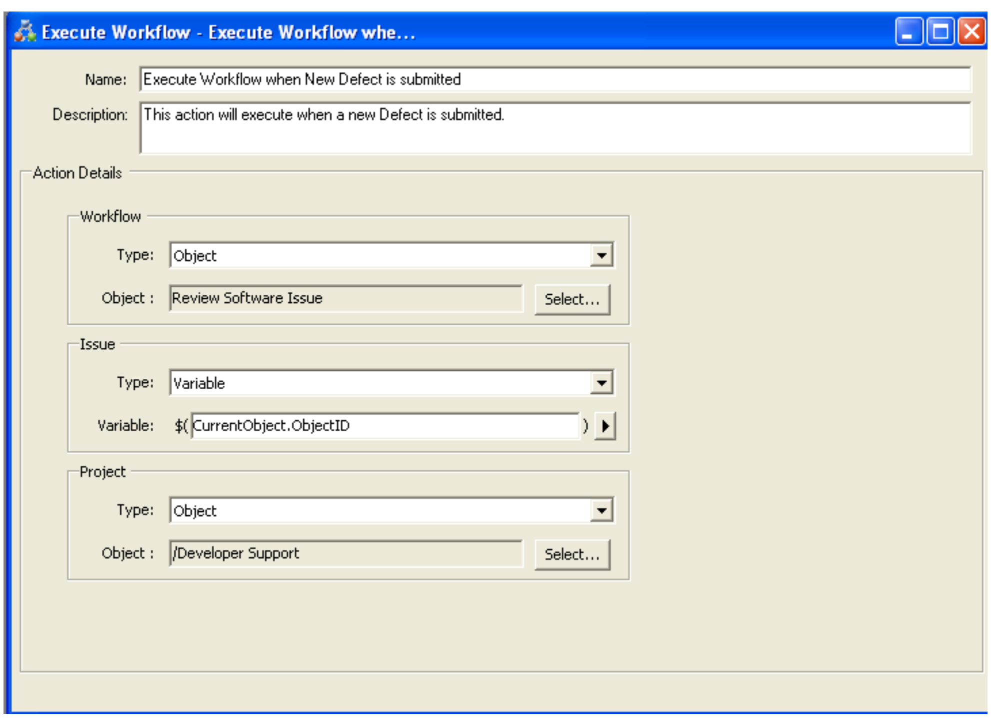
This month's tech tip will describe how to set up an Execute Workflow which will run when a new Defect is created.

Creating an Execute Workflow Action

The first step is to create an Execute Workflow Action. In the Administrator Data Source Explorer expand Actions and right-click on the Execute Workflows icon and select New. Be sure to Save the action.

The following fields are required:

- Name- Use this field to identify the Execute Workflow Action.
- Workflow- Select Type Object, then click the Select button and choose the workflow to be executed, make sure that the Workflow selected has a Create Object Action to create the initial task.
- Issue- Select type Variable and use the following variable: Current.ObjectID.
- Project-Select type Object and select the Project in which the task will be created.



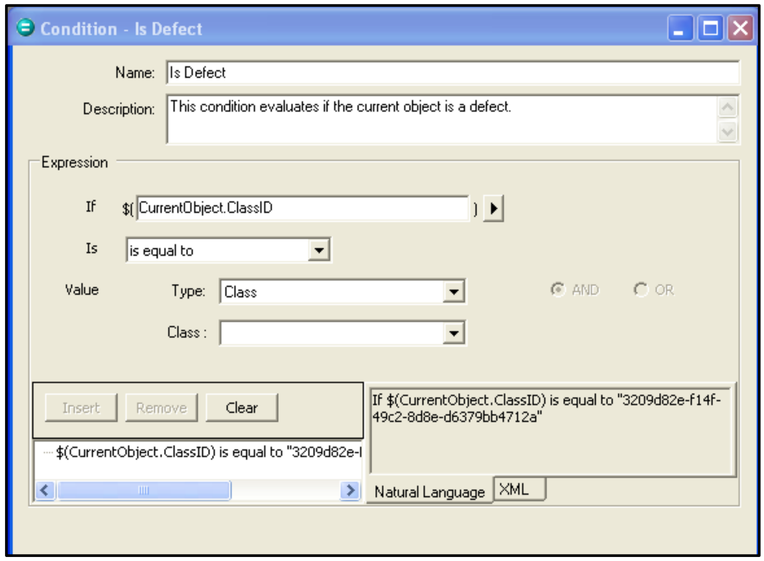
Create a Condition

The next step is to create a Condition that determines the type of Issue that is being submitted. This condition will verify that the issue is a Software defect.

In the Administrator Data Source Explorer right click on the Conditions icon and select New. Create a new Condition named “Is Defect”. Be sure to Save the condition.

The following fields are required:

- Name-Name of the Condition.
- Expression- This condition uses the variable ‘CurrentObject.ClassID’ is equal to Defect.

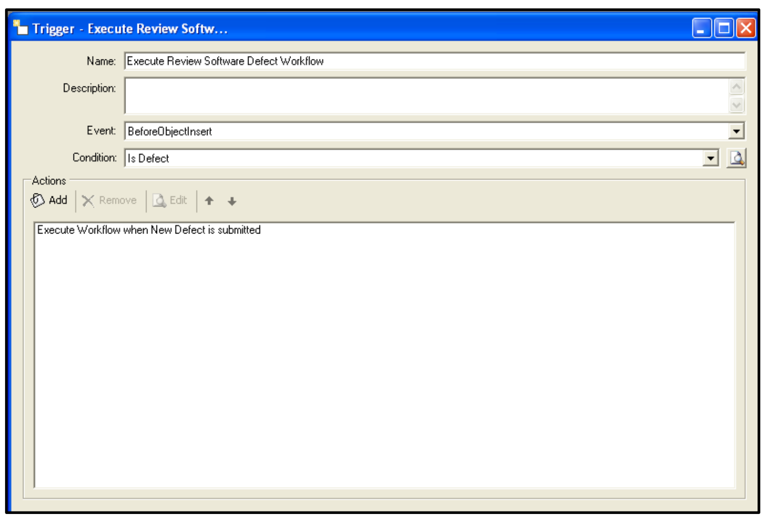


Create a Trigger

Once the Condition is created, the next step is to create a trigger. The trigger will determine when the trigger is executed, evaluate the Condition ‘Is Software Defect’ and run the Execute Workflow action. Be sure to Save the trigger.

The following fields are required:

- Name- Name of the Trigger.
- Event- Select BeforeObjectInsert.
- Condition- Select the Condition which evaluates the issue type.
- Actions- Add the Execute Workflow action.



Summary

When a new Defect is created, the trigger will fire, determine by using the Condition if the object is a Software defect it will then run the Execute Workflow action and create a Task in the selected Project.

Note: If you have the Manager open while building the action, you will need to disconnect from the Manager before testing.

For more information on topics not covered by this Tech Tip please review video tutorials and TechTips at www.elsitech.com. If you have questions beyond the scope of this Tech Tip, you may also contact Elsinore Technical Support Services at support@elsitech.com or 866.866.0034, option 2.