

OPUS Workflow Management for Solution Designers

Targeted how-to guide for OPUS Solution Environment (OSE) users on managing workflows including adding substates and transition conditions.



Workflow - Add a New Sub State

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the hyperlink for the desired row to view the details of the **Workflow** in View mode.
3. Click the **Edit** button from the Operations toolbar to configure the **Workflow**.
4. In the **Workflow States and Transitions** table, select the desired **Base State**.
5. Click the **Add Sub State +** icon to display the **Add Sub State** push panel.
6. Complete the following fields:
 - General Section: Select the **Base State** from the drop-down list.
 - Sub State Section: Enter the **Sub State** and **State Display Name**.
 - Toggle the **Start State** button to **Enable** or **Disable**, as necessary.
7. Click **APPLY** to add the new Sub State.
8. View the newly added Sub State in the **Workflow States and Transitions** table.
9. Click **Save** to save the changes to the Workflow.



Workflow - Edit a Sub State

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the hyperlink for the desired row to view the details of the **Workflow** in View mode.
3. Click the **Edit** button from the Operations toolbar to configure the **Workflow**.
4. In the **Workflow States and Transitions** table, select the desired **Sub State**.
5. Click the **Edit Sub State "pencil"** icon to display the **Edit Sub State** push panel.
6. Edit the required fields and click **APPLY** to save the changes.
7. View the edited **Sub State** in the **Workflow States and Transitions** table.
8. Click **Save** to save the changes to the Workflow.



Workflow - Edit a Sub State of the Base Start State

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the hyperlink for the desired row to view the details of the **Workflow** in View mode.
3. Click the **Edit** button from the Operations toolbar to configure the **Workflow**.
4. In the **Workflow States and Transitions** table, select the desired **Sub State**.
5. Click the **Edit Sub State** icon to display the **Edit Sub State** push panel.
6. Toggle the **Start State** button to **Yes** then click **APPLY**.
7. View the updated **Sub State** in the **Workflow States and Transitions** table.
8. Click **Save** to save the changes to the Workflow.



Workflow - Add a Transition

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the hyperlink for the desired row to view the details of the **Workflow** in View mode.
3. Click the **Edit** button from the Operations toolbar to configure the **Workflow**.
4. In the **Workflow States and Transitions** table, select the desired **Sub State** that is the desired transition **From State**.
5. Click the **Add New Transition** icon to display the **New Transition** push panel.
6. Select the desired transition from the **To State** drop-down list and click **Apply**.
7. View the new **Sub State Transition** in the **Workflow States and Transitions** table.
8. Click **Save** to save the changes to the Workflow.



Workflow - Edit Transition Conditions & Actions

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the hyperlink for the desired row to view the details of the **Workflow** in View mode.
3. Click the **Edit** button from the Operations toolbar to configure the **Workflow**.
4. In the **Workflow States and Transitions** table, select the desired **Sub State** that is the desired transition **From State**.
5. Select the desired transition **To State**, then click the **Edit Transition Condition and Action** icon to display the **Edit Transition Condition and Action** push panel.

6. In the panel, insert JavaScript code into one or both of the following fields:
 - Transition Condition
 - Transition Action
7. Click **APPLY** to add the new Transition Condition or Transition Action.
8. View the **Transition Condition** and **Transition Action** columns in the **Workflow States and Transitions** table to confirm the presence/absence of Transition Conditions and Transition Actions.
9. Click **Save** to save the changes to the Workflow.



Workflow - Remove a Transition

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the hyperlink for the desired row to view the details of the **Workflow** in View mode.
3. Click the **Edit** button from the Operations toolbar to configure the **Workflow**.
4. In the **Workflow States and Transitions** table, select the **Sub State** that is the desired transition **From State**.
5. Select the desired **Transition To State**, then click the **Remove Transition** icon to open the **Remove Transition** push panel.
6. Click **APPLY** to confirm the removal of the transition.
7. View the **Transition To State**, **Transition Condition** and **Transition Action** columns in the **Workflow States and Transitions** table to confirm the removal of the transition.
8. Click **Save** to save the changes to the Workflow.