

Define Workflow Stages

Last Modified on 11/11/2019 9:40 am EST

V9.0

Overview

It is common for organizational processes to include several steps, commonly referred to as workflow stages in Cora SeSequence. Workflow stages help end users understand what is required to move to the next stage of the process, and indicate what percentage of the process has been completed at a particular stage.

For example, a mortgage approval process might include several stages, each of which is a separate workflow.

- Application
- Credit check
- Background check
- Approval

There are two parts to workflow stages.

1. Define the stages.
2. Use the Set Stage Activity in the workflow at the relevant place.

Define workflow stages

1. In the Administration site, edit a workflow for which stages are to be set.
2. To define stages, click the workflow canvas, and in the Properties panel, select the ellipsis (...) next to Stage Set.
3. To define a new stage to the workflow, in the Select Workflow Stage Set window, click **New**.
4. Enter the following details:
 - Name: name of the stage.
 - Visible: You can configure when the stage is visible or hidden by editing the expression in the Workflow Stage Set.
The expression value, True or False, is calculated at runtime. The default value is True.
This parameter is relevant only for stage bars that are displayed in the runtime instance page.
 - Skipped: You can configure when a stage is skipped, that is, it is marked as incomplete.
The expression value, True or False, is calculated at runtime. The default value is False.
When the Skipped value is false, stages are marked as completed incrementally. For example, if a stage is before the "active" stage, it is marked as completed.
It is relevant only for stage bars that are displayed in the runtime instance page.
 - Percentage: Indicates the completion percentage of a workflow instance. Percentage value is absolute. The set value is the displayed value.

IMPORTANT

Expressions should be entered manually as the Stage Set wizard is outside the workflow context.

Define Workflow Stage Set ?

Add, edit or delete stages from this Workflow Stage Set

Name *

Name	Visible	Skipped	Percentage
Create	True	False	20 %
Review	True	True	40 %
Analysis	True	False	70 %
Sign-Out	True	False	100 %

⬆
⬇
✖

[+ Add Stage](#)

OK
Cancel

- To display the defined stages in the Runtime process instance page, select the **Show workflow stage bar in process instance page** check box in the Select Workflow Stage Set page.

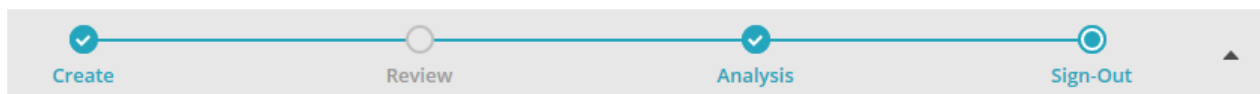
Use Set Stage activity in a workflow

After the stages are defined, add a Set Stage activity to the workflow to make the stages "active" and display them in the instance page on Flowtime.

- Add a Set Stage activity in the workflow.
- Open the Set Stage activity, and define the relevant active process stage as per requirement. You may choose from the list of defined workflow stages, or add an expression resulting in an existing stage name.
- Connect the Set Stage activity in the workflow at the relevant place.

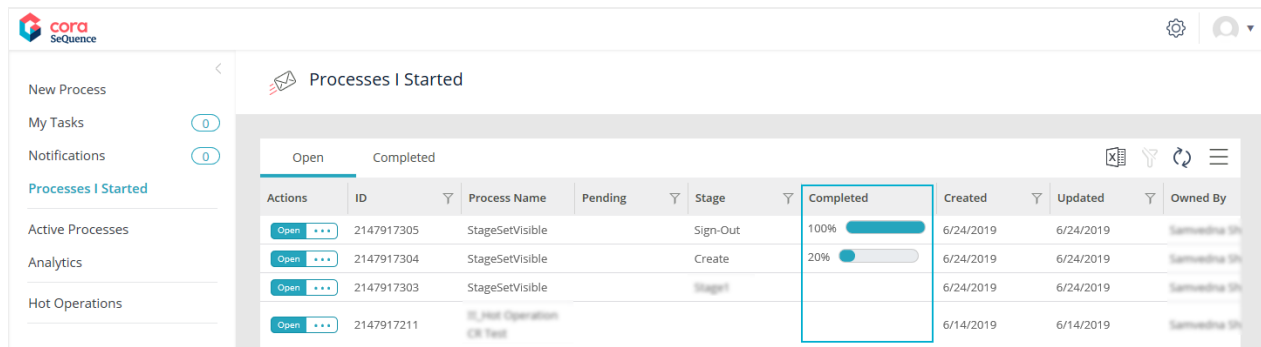
Based on your settings, the stage appears as "active" in the portal view and on the stage bar in runtime instance page, if the **Show workflow stage bar in process instance page** check box is selected.

Example



The completed stages appear with a check mark on the stage bar, while the skipped stages appear grayed out. For example, the Review stage in the above image is skipped.

You can view a task's completion percentage in the Completed column.



Open	Completed									
Actions	ID	Process Name	Pending	Stage	Completed	Created	Updated	Owned By		
Open	2147917305	StageSetVisible		Sign-Out	100%	6/24/2019	6/24/2019	Sarvesha SR		
Open	2147917304	StageSetVisible		Create	20%	6/24/2019	6/24/2019	Sarvesha SR		
Open	2147917303	StageSetVisible		Stage1		6/24/2019	6/24/2019	Sarvesha SR		
Open	2147917211	CR Test				6/14/2019	6/14/2019	Sarvesha SR		

Set the stage bar position

The default position of the stage bar is inline on the runtime instance page. You can edit the WorkflowExplorer configuration file to change its position.

1. Open the file: `Shared Resources\Components\WorkflowExplorer\Config\WorkflowExplorer.config`
2. Edit the `stageBarLocation` property, as required:
 - o Inline (default)
 - o Top
 - o Bottom
3. To change the position of the stage bar in the Process Lab (Administration site), change the same property in this file: `Shared Resources\Components\WorkflowExplorer\Config\WorkflowExplorer.debug.config`

V8.8 and earlier

Context

It is common for organizational processes to have distinct process stages. Defining workflow stages helps end users understand what is required to move to the next stage of the process. There are two parts to workflow stages.

1. Define the stages.
2. Use the Set Stage Activity in the relevant place in the workflow.

Use Cases

A mortgage approval process might include several stages, each of which is a separate workflow.

- Application
- Credit check
- Background check
- Approval

Wizard Tips

- To start the wizard, in the App Studio, from the Properties panel, click the three dot button next to **Stage Set**.
- You can enter the stage's percentage, which indicates the completion percentage of a case in a HotOperations solution. The percentage displays for each case in the HotOperations work allocation

board.

- To see the stages in the Flowtime process instance page, you must select the **Show workflow stage bar in process instance page** check box.
- You can configure the location of a workflow stage display, for example, up, down, or inline, in the workflow explorer configuration.