Sharing Activity Overview

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Context

The Sharing Activity shares the workflow instance with specified users and groups. You share data with users and groups based on information that is captured during workflow execution. There are several ways to define who you share the workflow instance with.

- Explicitly define user
- Explicitly define group
- User expression: the expression should result in a User, or a collection of Users.
  See examples below.
    - Specific user by Id: *User(rt, 1130)*
    - Get user by name: *UsersByDisplayName(rt, <displayName>)*
    - Get user by email: *UsersByEmail(rt, <email>)*
- Group expression: the expression should result in a Group, or a collection of Groups.
  See examples below.
    - Specific group by Id: *Group(rt, 8)*
    - Get groups by name: *GroupsByName(rt, <groupName>)*
    - Get my groups: *CurrentUserGroups(rt)*
    - Get my groups level up (1, 2, 3, All): *CurrentUserParentGroups(rt, <level>)*

You can extract workflow activities to a sub-workflow to hide certain workflow execution, and assign the sub-workflow specific permissions.

Use Cases

- **Loan origination workflow**

  The workflow kicks off when a customer completes an application, in which the customer specifies the loan type, such as personal loan, car loan, mortgage. You can share the workflow instance, meaning, define who views and interacts with the loan request, based on the loan type (data collected during the workflow).

- **Customer service workflow**

  Customers send requests to a customer service email address. You can share the workflow instance, meaning, define who views and interacts with the service request, based on customer information.

Wizard Tips

- To assign all members of a workflow security role, click the **Assign Everyone** check box for the specific security role.