

Working with Variables

Last Modified on 04/27/2020 7:48 am EDT

V8.7

Overview

Variables enable you to easily expose data to end users, and manage dynamic flow using gateway conditions. There are two types of variables.

- **Global:** variables defined for the environment and can be used in any workflow.
- **Local:** variables defined for a specific workflow.

Variables in Case Management Solutions

Each workflow in a solution can update the master workflow's global variables. This enables you to display up-to-date views of case details.

You can define the important details of a case as the global variables of the solution. This enables you to provide end users with better list management features, such as sort and filter to cases and sub-cases lists.

Variables also enable you to manage the execution path of a workflow and determine on-the-fly which sub-process will be executed.

Variables can also be used in Smart Allocation Plans to effect the automatic allocation of cases (HotOperations license only).

Managing global variables

Global variables are managed in one central location and can be used in any workflow.

You can add and edit global variables from the **Administration > Global Settings > Global Variables**.

Edit	Name	Alias	Type	Visible	Length	Use Max. Length	Delete
<input checked="" type="checkbox"/>	Priority	Priority	String	<input checked="" type="checkbox"/>	255	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	S2P Cost Threshold	S2P Cost	Double	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>

When you create or update a global variable, you can define whether the variable is visible or not in Flowtime.

Update Table: Global Variables

Name *

Alias

Type *

Length *
 Use Max. Length

Visible

For string variables, you can define a length parameter, or enable the system to use the maximum allowed length.

Note:

- Visibility is configurable from Cora SeQuence V8.6 and later.
- Length parameters for string variables are available starting with V8.7

Adding variables to a workflow

To add variables to a workflow, in the App Studio, click the workflow canvas, and then go to **Properties > Variables**.

Workflow Variables Definition Wizard ?

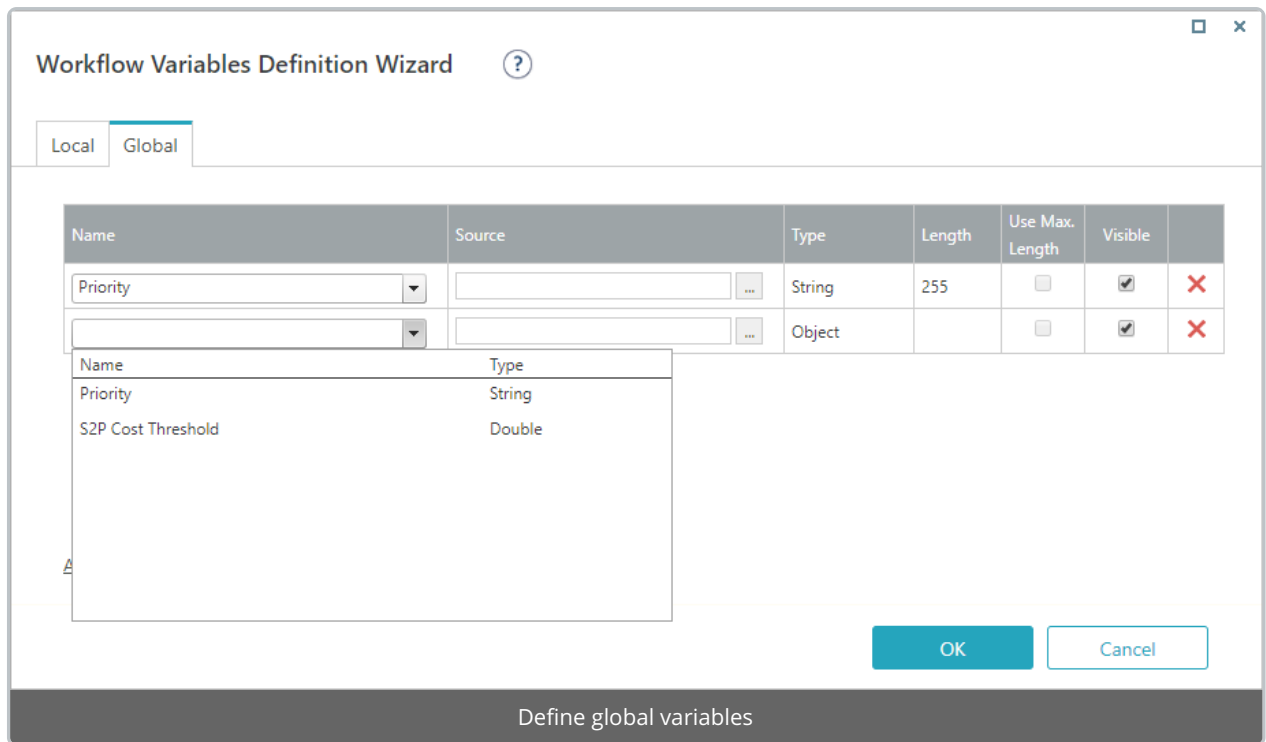
Local Global

Name	Alias	Source	Type	Length	Use Max. Length	Visible	
Approved	Approved	<input type="text"/> ...	Boolean	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	✗
scmCaseEffort	Case Effort	<input type="text"/> ...	Int16	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	✗
scmCaseImportance	Case Importance	<input type="text"/> ...	Boolean	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✗
scmCaseDueDate	Due Date	<input type="text"/> ...	DateTime	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✗
scmCaseTitle	Case Title	<input type="text"/> ...	String	600	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✗
NoOfRows	No of Rows	<input type="text"/> ...	Int32	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	✗

[Add new variable](#)

OK Cancel

Define local variables



Assign values to variables

You can assign values to variables using one of the following methods.

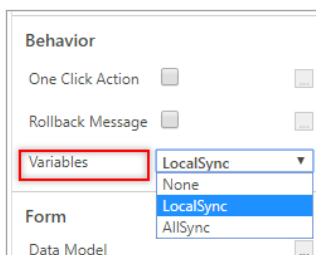
- [Assign Activity](#)
- Source option in the workflow variables definition wizard.
- [Built-In Command Activity](#) (if you want to set a variable for a different workflow)

Define variable synchronization options

You can define when variables are refreshed ('synchronized') during workflow execution. When a variable is refreshed, the value of the variable is updated according to the current value of its source field. These values can change over time as multiple instances of the workflow are executed.

For each activity, you can set the way the variables are refreshed when that activity is executed.

1. In App Studio, click the activity.
2. In the Properties panel, select the variable refresh behavior from the **Variables** drop-down menu.
 - **None**: do not refresh variable values when this activity is executed.
 - **LocalSync**: when this activity is executed, refresh only variables whose source fields are in this activity.
 - **AllSync**: when this activity is executed, refresh all workflow variables regardless of which activity contains their source fields.



View variables in Flowtime

Each variable is visible or hidden in Flowtime according to its Visibility setting in App Studio.

If set to Visible:

- Local variables can be viewed only in the Active Processes page and in all the HotOperations grids.
- Global variables can be viewed in the Inbox and My Processes grid. In HotOperations it can be viewed in all the HotOperations grids.

In the following example, the local variable Entity Type has been set to **Visible** in the App Studio. See below how it appears as a column in the Open Processes grid of the KYC workflow.

Process No	Creation Date	Owned By	Last Updated	Pending	Stage	Customer Name	Global ID	Entity Type	Risk Level	Last Comment
87	4/17/2016	Sam Master	4/17/2016		Creation					
13	4/14/2016	Sam Master	4/14/2016		Analysis - Risk Rating	AMD		Public Organization		
12	4/14/2016	Sam Master	4/14/2016		Analysis - Risk Rating	Zoolo		Individual		
1	4/13/2016	Sam Master	4/13/2016		Analysis - Risk Rating	LoliPop	QWR5426	Individual		

Limitations

- You cannot use the following words as a visible variable. Flowtime grids does not display properly if they are used.
 - Stage
 - Status
 - Subject
- After you add a global variable to a workflow, changes made to the global variable definitions are not reflected in the workflow. To apply the changes, you need to select the variable again in the Workflow Variables Definition Wizard.

V8.6 and earlier

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Variables can also be used in Smart Allocation Plans to effect the automatic allocation of cases. (HotOperations license only).

Managing global variables

Global variables are managed in one central location and can be used in any workflow.

You can add and edit global variables from the **Administration > Global Settings > Global Variables**.

The screenshot shows the 'Global Variables' management interface. On the left is a navigation menu with 'Administration' expanded to 'Global Settings', where 'Global Variables' is selected. The main area displays a table with columns: Edit, Name, Alias, Type, Visible, and Delete. Two records are listed: 'S2P Cost Threshold' (Double, Visible) and 'Priority' (String, Visible). Below the table is a '+ Add New Record' button and pagination information: 'Page size: 10' and '2 items in 1 pages'.

Edit	Name	Alias	Type	Visible	Delete
	S2P Cost Threshold	S2P Cost	Double	<input checked="" type="checkbox"/>	
	Priority	Priority	String	<input checked="" type="checkbox"/>	

When you create or edit a global variable, you can define whether the variable is visible or not in Flowtime.

The form is titled 'Add Record to: Global Variables'. It contains the following fields: 'Name' (text input), 'Priority' (text input), 'Alias' (text input), 'Priority' (text input), 'Type' (dropdown menu with 'String' selected), and 'Visible' (checkbox).

Note: Visibility is configurable from Cora SeQUENCE v8.6 and later.

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Workflow Variables Definition Wizard ?

Local Global

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scmCaseEffort	Case Effort	<input type="text"/> ...	Int16	<input type="checkbox"/>	✗
scmCaseImportance	Important	<input type="text"/> ...	Boolean	<input checked="" type="checkbox"/>	✗
scmCaseDueDate	Due Date	<input type="text"/> ...	DateTime	<input checked="" type="checkbox"/>	✗
scmCaseTitle	Case Title	<input type="text"/> ...	String	<input checked="" type="checkbox"/>	✗
NoOfRows	No of Rows	<input type="text"/> ...	Int32	<input type="checkbox"/>	✗

[Add new variable](#)

OK Cancel

Define local variables

Workflow Variables Definition Wizard ?

Local Global

Name	Source	Type	Visible	
<input type="text"/>	<input type="text"/> ...	Object	<input checked="" type="checkbox"/>	✗

Name	Type
S2P Cost Threshold	Double
Priority	String

[Add new variable](#)

OK Cancel

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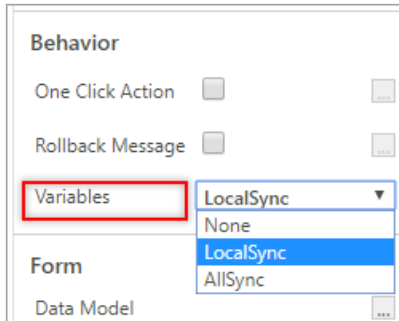
- **Built-In Command Activity** (if you want to set a variable for a different workflow)

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13	4/14/2016	Sam Master	4/14/2016		Analysis - Risk Rating	AMD		Public Organization		
12	4/14/2016	Sam Master	4/14/2016		Analysis - Risk Rating	Zoolo		Individual		
1	4/13/2016	Sam Master	4/13/2016		Analysis - Risk Rating	LoliPop	QWR5426	Individual		

The 'Entity Type' column is highlighted with a red box in the original image. The table shows four rows of data with columns for Process No, Creation Date, Owned By, Last Updated, Pending, Stage, Customer Name, Global ID, Entity Type, Risk Level, and Last Comment.

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