

Status based workflow

- [Status](#)
- [Status action](#)
- [Status dependencies](#)
- [Status flow](#)
- [Status routing](#)
- [Workflow engine](#)

Status

Each record in TS no-code has a status assigned.

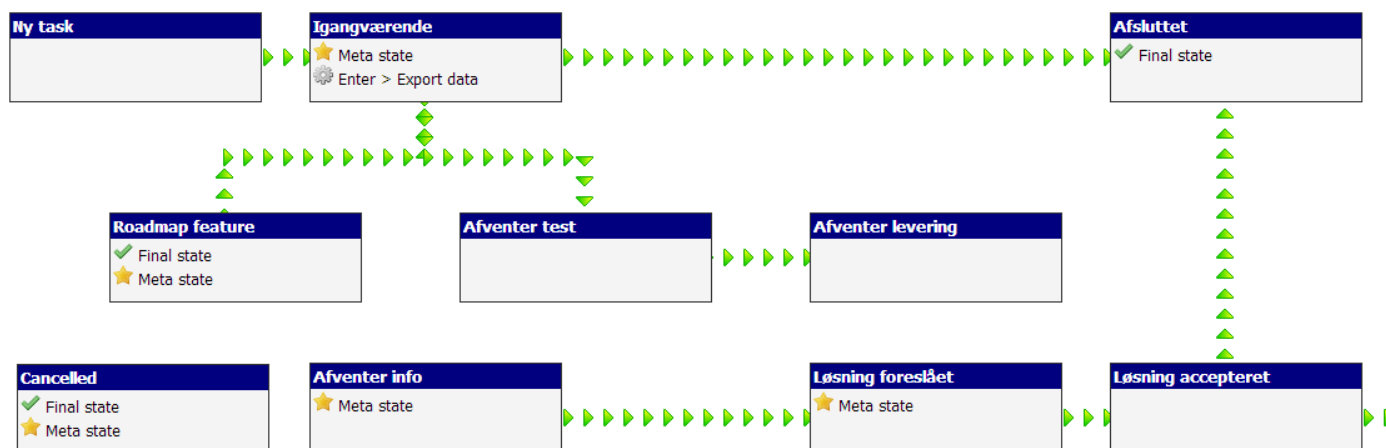
A status signifies the state of the record, in regard to maturity, responsibility and degree of completion etc., but also serves as an anchor for automated actions and permission for users.

A default status is always assigned. After that the status can change either manually, or as a result of automated action.

Sources for automated changes include

- External users via questionnaire interaction
- Timed **status actions**: Ex. Escalation
- Automated routing based on record values

The states available for a record are defined by which states are connected to the current state, either by status connectors or special properties ("meta state").



Status action

Status actions are addon functionality bound to a certain status.

When an item fulfills certain criterions, the action is fired resulting in

- Sending of an email ([Notification](#))
- Export and routing of documents ([Export](#))
- Creation of tasks ([Task create](#))

Conditions for triggers can be:

- When entered
- When leaving
- Set amount of time

Read more about it here: [Status actions](#)

Status trigger	
Title	Reminder
Action type	Timed ▼
	7 days relative to Last modified ▼
Notification	☐ Active
Task create	☐ Active
Codeunit	☐ Active
Export	☐ Active
Shift status	☐ Active
Last runtime	☐ Active
ADD CANCEL	

Status dependencies

Status dependencies ensure that a certain status can be assigned, after certain criterions are met.

Example:

- Status "Priority handling" dependency: Customer type = "GOLD"

Status prerequisite		
Field	Operator	Expression
Kontaktet	=	Yes
		Add Cancel

Status flow

Status flows represent legal pathways in the workflow.

In regard to the user interface, only valid options will be displayed in the records status selector. This check is also carried out by the data layer, so the same restrictions apply regardless of the data that was entered by regular users, file imports and the webservice interface.

If a given status can be used from most other states, we recommend using the `Status:IsMeta` attribute: Meta states can be entered from all other states.

Status routing

The routing feature provides options for changing a records status automatically.

To do routing you need the following

- A test case
 - A field reference
 - Compare operator (ex. "=")
 - Compare value (ex. "Hello world")
- Status set if the test is POSITIVE
- Status set if the test is NEGATIVE

The test is evaluated each time the record is saved, and status is only changed if a valid comparison can be made.

Status routing		
Field	Operator	Expression
Kontakt	=	Happy
Routing	Test positive	Interesseret
	Test negative	Afvist
		Add Cancel

Workflow engine

All entities in the system have workflow / lifecycle model attached to them. In addition all records will have a status field, indicating the records place in its workflow. Each step in a workflow is called a status, and influences how records behave in that step (status).

- What new status can be assigned from here
- What automated actions should be carried out (see below)
- What permissions do the users have in this step
- What fields should be shown or hidden
- What are the time constraints on this part of the process

Automated actions

Entering, leaving or staying in a certain status can trigger certain actions in the system.

Trigger summary

- Enter
- Leave
- Timed

Timed actions are defined as an amount of time, relative to some date fields.

“ Send an email 1 day before the date defined in the BIRTHDAY field

Execute code 7 days after this status was reached

Actions include

- Notifications
- Task creation
- Code execution (this can do anything)
- Change status
- Export data
- Delete data (GDPR compliance)

Learn more about [Status action configuration](#)

Performance measures (LEAN)

For each record in the system it is possible to measure the time spent in a status.

This can be compared to performance targets on

- The whole flow
- A single status

The targets consists of two values

- Goal
- Tolerance

“ After submitting a ticket, the service desk should optimally respond within 4 hours (goal). We can however accept if it takes 24 hours (tolerance).

We can now easily mark up records depending on their time usage

- Green: Better than goal
- Yellow: Better than tolerance, worse than goal
- Red: Worse than tolerance

This can be visualized on each record using Gauge fields, or in aggregated form via a list report.

Instructions

Setting up measures

- Entity > Advanced
 - Set checkmark in
 - Define goal and tolerance
- For each Entity > Status
 - Define goal and tolerance
 - If the status is the last part of a measured workflow check Final

Adding Gauges to an entity

- Visual extra: Visual: Target gauge Step
- Visual extra: Visual: Target gauge Total