

Add and schedule Workflows

Summary

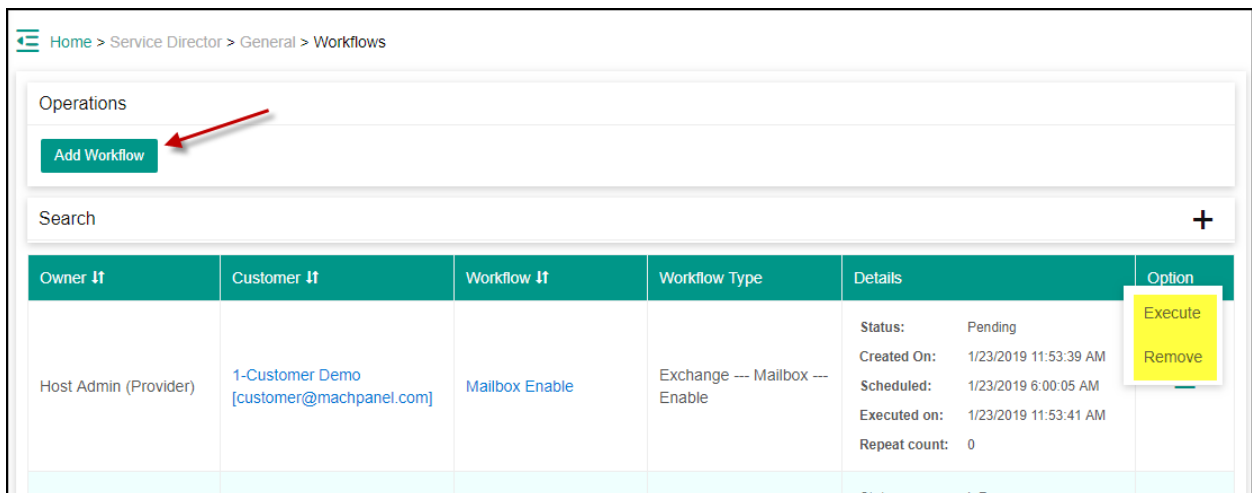
This article provides a summary on how add and schedule Workflows for different type of operations.

Applies To

This article applies to MachPanel build v6.0.38 and above.

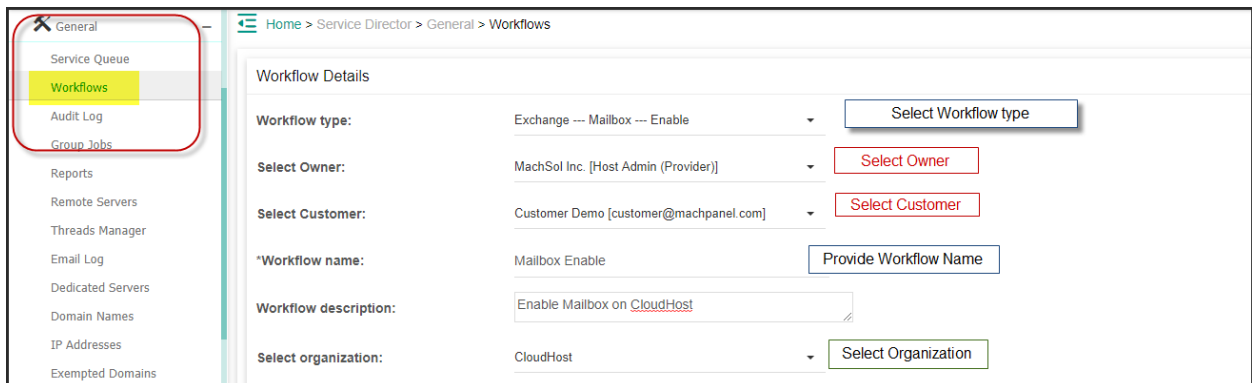
Add and schedule Workflows:

- Navigate to the following path: **Home > Service Director > General > Workflows**



The screenshot shows the MachPanel interface for the 'Workflows' section. The breadcrumb path is 'Home > Service Director > General > Workflows'. Under the 'Operations' header, the 'Add Workflow' button is highlighted with a red arrow. Below this is a search bar and a table of existing workflows. The table has columns for Owner, Customer, Workflow, Workflow Type, Details, and Option. One workflow is listed: 'Mailbox Enable' for 'Host Admin (Provider)' and '1-Customer Demo'. The details for this workflow show it is 'Pending', created on 1/23/2019 11:53:39 AM, scheduled for 1/23/2019 6:00:05 AM, and executed on 1/23/2019 11:53:41 AM. The 'Option' column for this workflow has 'Execute' and 'Remove' buttons.

- Create new Workflow by clicking **Add Workflow** add required details.



The screenshot shows the 'Add Workflow' form in MachPanel. The left sidebar has 'Workflows' highlighted. The main form area is titled 'Workflow Details' and contains the following fields:

- Workflow type:** Exchange --- Mailbox --- Enable (dropdown menu)
- Select Owner:** MachSol Inc. [Host Admin (Provider)] (dropdown menu)
- Select Customer:** Customer Demo [customer@machpanel.com] (dropdown menu)
- *Workflow name:** Mailbox Enable (text input)
- Workflow description:** Enable Mailbox on CloudHost (text input)
- Select organization:** CloudHost (dropdown menu)

Buttons for 'Select Workflow type', 'Select Owner', 'Select Customer', 'Provide Workflow Name', and 'Select Organization' are visible next to their respective fields.

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- There are different types of Workflow available for Active Directory, Exchange, Skype for business, CSP etc.
- If you want to schedule this then "**Enable Schedule**" as shown below & select Execution Data/Time.

The screenshot shows a configuration form for adding a workflow. At the top, 'Select organization:' is set to 'CloudHost'. Below it, 'Select Mailbox(es):' has a search bar. Two lists are shown: 'Selectable' (empty) and 'Selected ^' containing 'Lucas Hayden' and 'Lyle Hal'. In the center are four green arrow buttons for moving items between lists. Below the lists, the 'Schedule:' checkbox is checked and highlighted in yellow. The 'Execution date:' is '1/23/2019'. The 'Execution time:' is set to '00' hours and '00' minutes. At the bottom are 'Save' and 'Cancel' buttons.

- Click **Save**, Workflow added successfully Use **search** filter for required customer.

The screenshot shows the main dashboard with a search filter applied. The search results list various workflow types, with 'Microsoft CSP --- Subscription --- Add' highlighted in yellow. The dashboard includes a navigation menu on the left with 'Home > Service Director > General > Workflows', an 'Add Workflow' button, and a search bar. The top right shows the user 'Support Admin' is logged in as 'Provider'. A success message 'Operation was successful.' is visible at the top left.

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MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/55590/Add-and-schedule-Workflows>