

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 'Home > Service Director > General > Workflows' navigation path. Under the 'Operations' section, the 'Add Workflow' button is highlighted with a red arrow. Below it is a search bar and a table of workflows.

Owner ID	Customer ID	Workflow ID	Workflow Type	Details	Option
Host Admin (Provider)	1-Customer Demo [customer@machpanel.com]	Mailbox Enable	Exchange --- Mailbox --- Enable	Status: Pending Created On: 1/23/2019 11:53:39 AM Scheduled: 1/23/2019 6:00:05 AM Executed on: 1/23/2019 11:53:41 AM Repeat count: 0	Execute Remove

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

The screenshot shows the 'Add Workflow' form. On the left, the 'General' menu is open, and 'Workflows' is selected. The form fields are as follows:

- Workflow type:** Exchange --- Mailbox --- Enable (with a 'Select Workflow type' button)
- Select Owner:** MachSol Inc. [Host Admin (Provider)] (with a 'Select Owner' button)
- Select Customer:** Customer Demo [customer@machpanel.com] (with a 'Select Customer' button)
- *Workflow name:** Mailbox Enable (with a 'Provide Workflow Name' button)
- Workflow description:** Enable Mailbox on CloudHost
- Select organization:** CloudHost (with a 'Select Organization' button)

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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 web form for adding and scheduling workflows. At the top, there is a dropdown for 'Select organization:' with 'CloudHost' selected. Below it is a section for 'Select Mailbox(es):' with a search bar and two lists: 'Selectable' (empty) and 'Selected *' (containing 'Lucas Hayden' and 'Lyle Hal'). Between these lists are four green buttons: '>|', '<|', '>', and '<'. Below the lists, the 'Schedule:' checkbox is checked and highlighted in yellow. The 'Execution date:' is set to '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 a web interface for managing workflows. A green banner at the top indicates 'Operation was successful.' and 'Support Admin is logged in as Provider'. The main content area has a sidebar with 'Home > Service Director > General > Workflows' and an 'Add Workflow' button. A search bar is present, and a dropdown menu is open, showing a list of workflow types: 'Active Directory --- User --- Enable', 'Active Directory --- User --- Disable', 'Active Directory --- User --- Delete', 'Exchange --- Mailbox --- Enable', 'Exchange --- Mailbox --- Disable', 'Exchange --- Mailbox --- Delete', and 'Microsoft CSP --- Subscription --- Add'. The 'Microsoft CSP --- Subscription --- Add' option is highlighted in yellow. Below the dropdown, there is a table with columns for 'Select workflow type', 'Select Status', and 'Workflow name'. The 'Data' section shows 'MachSol Inc. [Host Admin (Provider)]' as the selected customer, and a 'Search' button is at the bottom.

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MachPanel Knowledgebase

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