

Testing Workflows

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Workflows can be tested to ensure they perform as expected.

The Run workflow page can be accessed either through Workflow Builder or the Workflow Report.

Accessing the Run Workflow Page

To access the Run Workflow Page:

1. Open the tenant administration page [more](#)
2. In the Left Navigation Area, select **Workflows**. The Workflows expands to display list.
3. Select **Workflows**. The existing Workflows display.
4. Option 1: access via the Workflow Builder
 1. Select the Workflow that requires testing.
 2. Ensure the workflow is saved after any modifications.
 3. Select the **Run** button from the right left hand action menu.
5. Option 2: access via the Workflow Report
 1. Right click on the Workflow that requires testing. The menu appears
 2. Select 'Start '.
6. See Running a Workflow Test, below for how to perform a test.

Running a Workflow Test

Be careful when testing a workflow that modifies or deletes records. It is recommended that test data is entered beforehand to test the workflow where there are records being modified or deleted.

To run a workflow test:

1. In the input text box, select the record that you would like to run the workflow against. If you do not have any, go back and enter test sample data.
2. **Enable Trace**: select this if you would like to see the detailed steps of each activity action. Particularity handy for both troubleshooting issues and when workflows have loops and more complex evaluation to ensure the correct flow is taken.
3. **Open Follow-up tasks**: select this if your workflow contains a **User Action**, **User Input** or **Review Survey** activity. This option will open up any tasks that are generated by the workflow by these activities.
4. Select **Run**.

In summary, the results will show whether the workflow run was successful. If the workflow was not successful, use the trace steps to determine where the cause may lie in the workflow.

It is recommended that all possible paths are tested so that any issues can be fixed prior to releasing the workflow.

To assist with troubleshooting a workflow, use the `Log` activity to write results of a particular action to a log, to help determine the cause. This information can also be used with the `Workflow Runs`.