

Configuring Automation items

Automations are configurable components that define checks and actions. They can apply to the Affected Items (Relationship) or the **Change Order** itself (*Context Item*).

Each Automation falls into one of **two types**:

- **Validation** – System checks that enforce data quality and business rules:
 - Ensuring a Change Order does not include affected items with missing required properties.
 - Verifying that when an action like **Revise** is selected, the affected item is in the **Released** state.
- **Action** – Automated updates applied to affected items or the Change Order:
 - Automatically changing the lifecycle state of affected items (e.g., from **In Review** to **Released**) after a Change Order's workflow is completed, based on the defined action.
 - Automatically setting the **Actual Completion Date** on the Change Order when its workflow finishes.

Automations improve consistency and efficiency in the change process by reducing manual work and enforcing business rules automatically.

The following is an example of an error message generated during a validation Automation:

