

Run a workflow and provide its inputs

Show how to choose a workflow, complete forms or upload files, start a run, and safely leave and return.

Running a workflow creates one trackable execution of a reusable process. The workflow definition controls the steps; the inputs you provide determine what this run works on. Review the workflow's purpose and required inputs before starting because later steps may use them automatically.

Before you start

- Confirm that the workflow matches the intended outcome and organization.
- Collect the required form values, files, dates, recipients, or connected records.
- Use approved, current source material and remove secrets that the workflow does not need.
- Check whether the run may write to an external system, send communications, execute code, or request approval.

Start the run

1. Open Workflows and select the workflow you are allowed to use.
2. Read its description and any input guidance, then choose Run or the available start action.
3. Complete each required field and select files or resources from the intended organization and project.
4. Review the inputs as a set, especially dates, recipients, record IDs, and options that allow external changes.
5. Start the run and keep its run page or run ID so you can return to it later.

Monitor progress

The run page shows step status and available outputs. Pending usually means a step has not started; running means work is in progress; waiting may mean a person must provide input or approval; completed means the step finished; failed means the visible error should be reviewed. Leaving the page does not normally cancel a durable run, so return through workflow run history instead of starting a duplicate.

Review the result

Open the final output and any important intermediate step. Verify warnings, source references, generated files, external changes, and approval decisions before distributing or relying on the result. If a

run fails, identify the first unsuccessful step and capture the workflow ID, run ID, step, time, inputs category, and exact error—never credentials or secrets.