Advanced Assignment Triggering

This document outlines the process of setting up triggered assignments based on custom criteria, such as user profile properties or responses to specific forms or items. By following these steps, you will learn how to automate assignments efficiently, ensuring that users receive relevant tasks based on their form responses.

Step 1

Begin by setting up triggered assignments using advanced custom criteria, such as user profile properties or specific form responses. For instance, you can configure a test form to assign tasks based on user responses to particular questions.


Step 2

To proceed, assign the "bringing food item" task to the test form if the user indicates they will bring a food item. Set this assignment to be triggered by custom criteria. Open the test form acknowledgment, add a rule, and select the appropriate form.
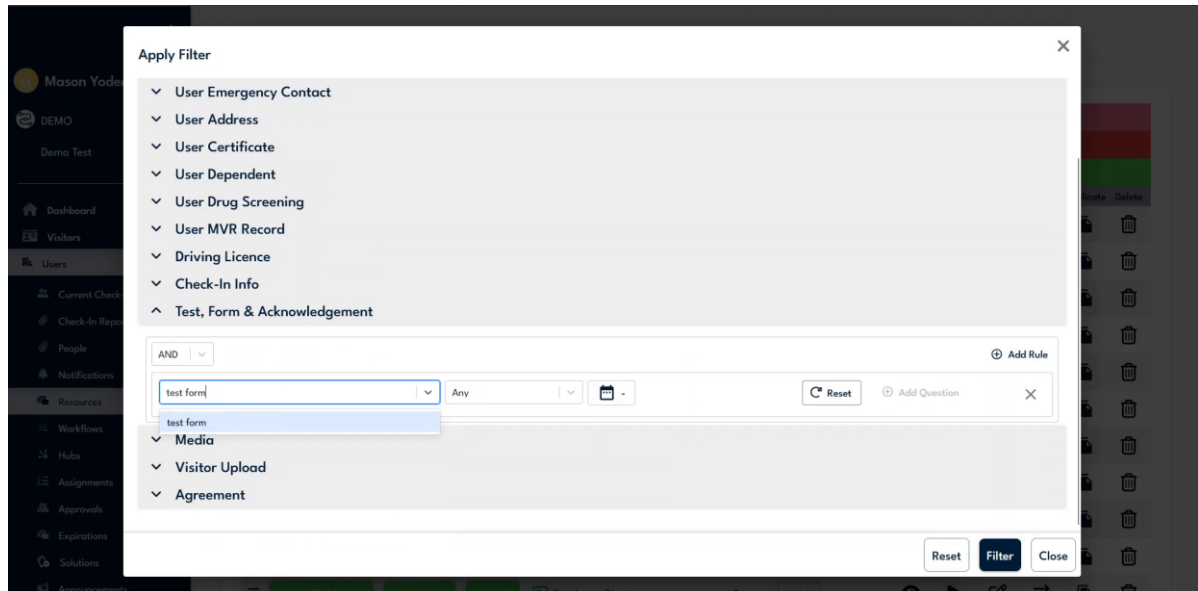

Step 3

Configure the criteria to trigger the assignment regardless of whether the form is passed or failed, since there is no pass/fail condition. Optionally, set a custom date range for triggering the assignment, or leave it open-ended. Proceed to add a question and rule.
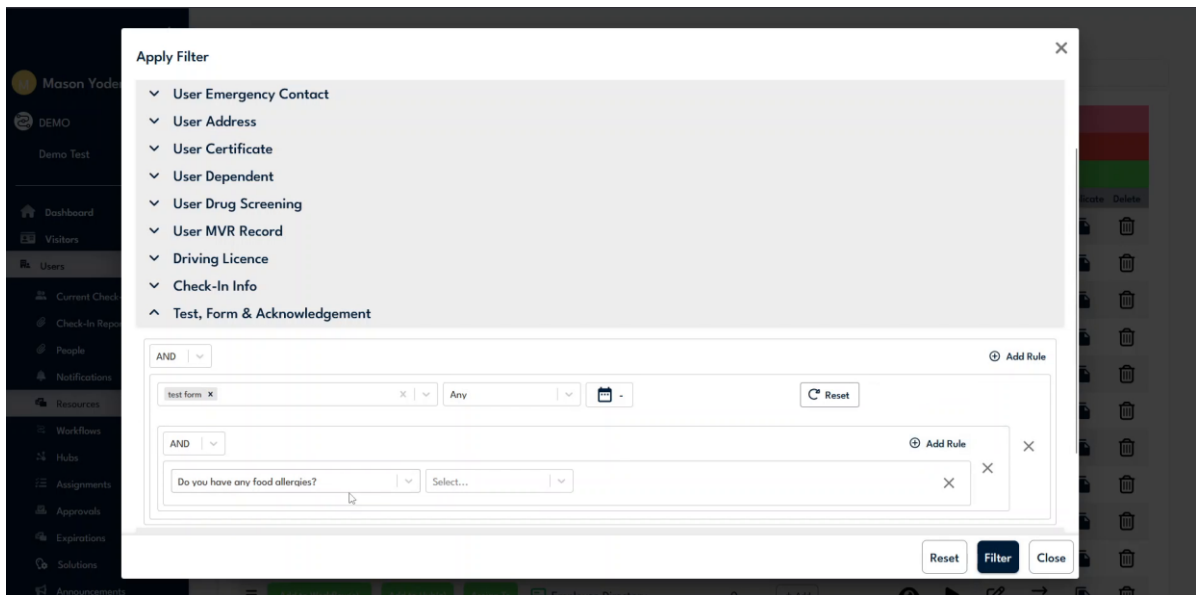
Step 4

Review the list of questions on the form and select the one about bringing a food item. Specify that the task should be assigned if the user selects "Yes" to bringing a food item.
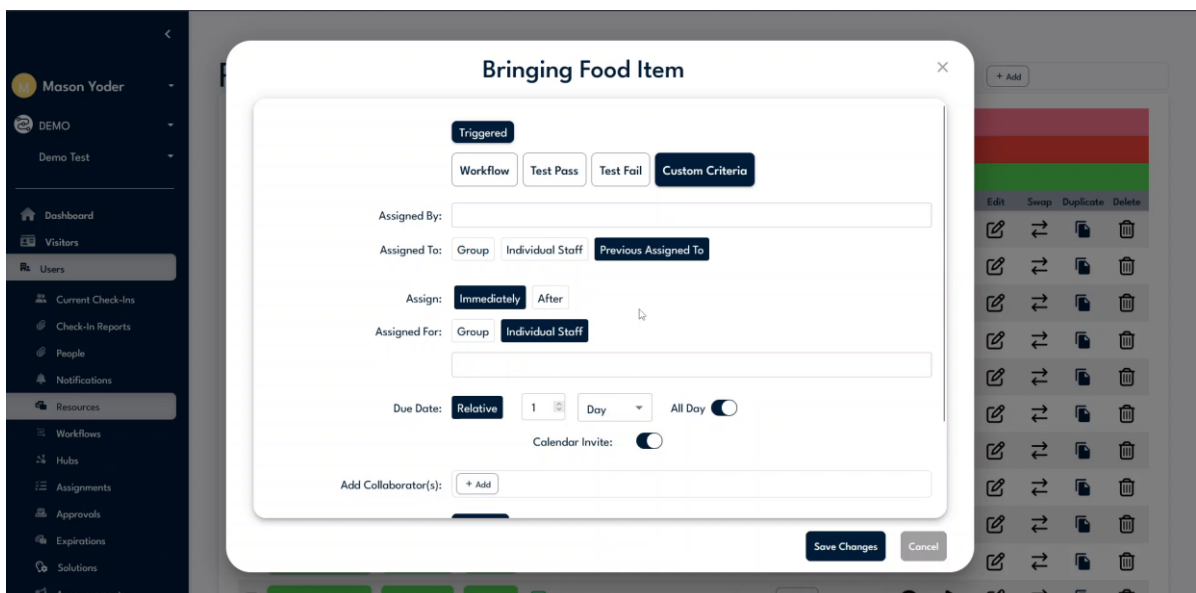
Step 5

Complete the remaining fields in the form as required.

Step 6

Navigate to the assignments and automations section to verify the "bringing food item" workflow. Confirm it is triggered by custom criteria and will be due one day post-assignment. Use this section to make quick edits if necessary.

Step 7

Access the form and respond affirmatively to the relevant questions.

Step 8

Check to ensure the "bringing food item" workflow is assigned. Sign in to the hub and review the assigned tasks.

Step 9

Verify that the "bringing food item" workflow has been correctly assigned based on your response about bringing a food item. Review

the assignments section to confirm the workflow and view the automation linked to the form and item assignment.