

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.

The screenshot shows a 'test form' dialog box with the following content:

test form

1*. Will you be participating in the potluck?

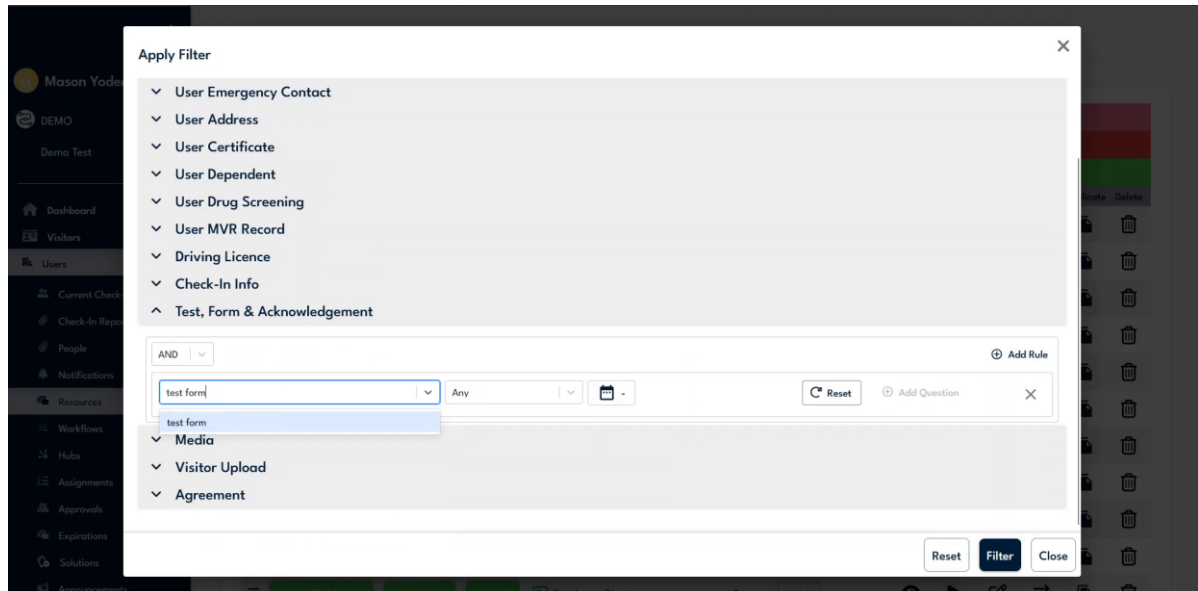
2*. Do you have any food allergies?

3*. Are you bringing a food item?

The background interface includes a sidebar with a user profile for 'Mason Yoder', a 'DEMO' section, and a navigation menu with items like Dashboard, Visitors, Users, Current Check-ins, Check-in Reports, People, Notifications, Resources, Workflows, Hubs, Assignments, Approvals, Expirations, Solutions, and Announcements. The main area shows a 'Resources' section with a list of items and a table with columns for History, View, Edit, Swap, Duplicate, and Delete.

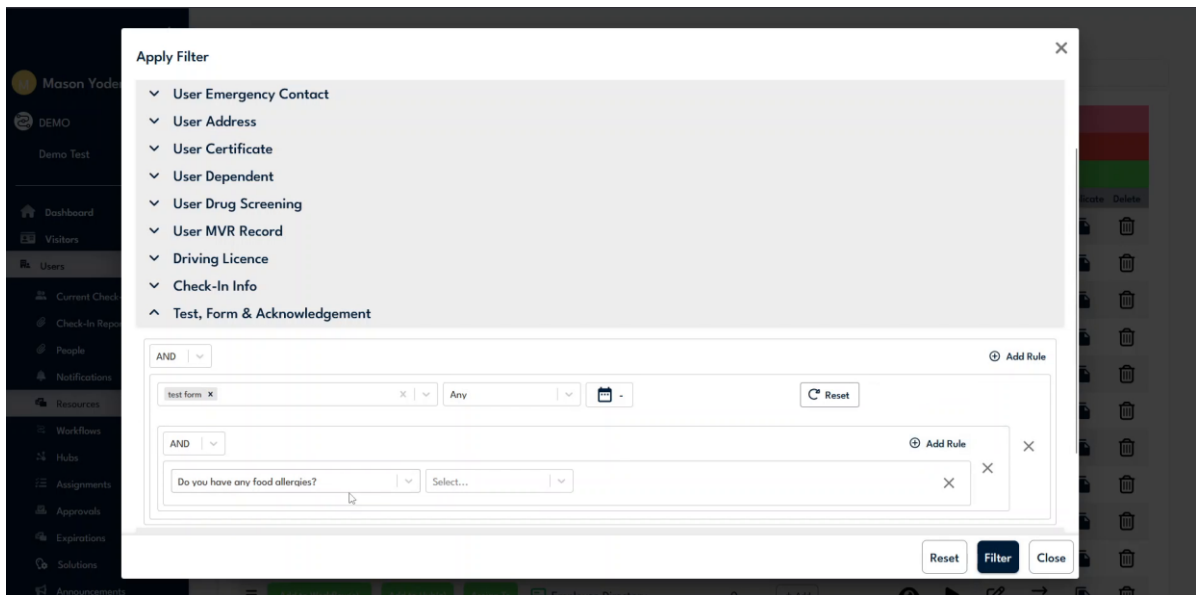
Step 2

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.



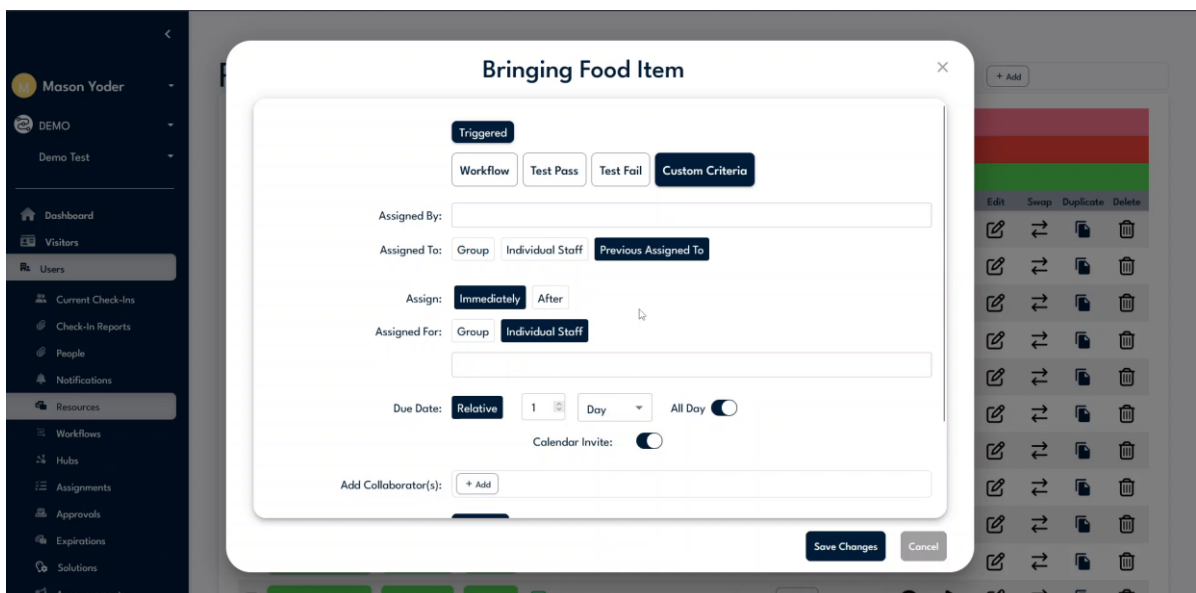
Step 3

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.

Bringing Food Item

Assigned By: Test User

Assigned To: Group Individual Staff Previous Assigned To

Assign: Immediately After

Assigned For: Group Individual Staff Previous Workflow User

Due Date: Relative 1 Day All Day

Calendar Invite: ☐

Add Collaborator(s): + Add

Reminders: Add Date

Email: ☐ Text: ☐ Digital Signage: ☐

Save Changes Cancel

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.

Automations

Workflow	Trigger	Assigned To	Due Date	Actions
Bringing Food Item	Custom Criteria	Previous Workflow User	1 Day(s) after assignment	
Allergy - (!)	Custom Criteria	Previous Workflow User	1 Day(s) after assignment	

Showing 1 to 2 of 2 entries

Show 10 entries Previous 1 Next

Step 7

Access the form and respond affirmatively to the relevant questions.

2*. Do you have any food allergies?

Yes No

3*. Are you bringing a food item?

Yes No

Complete Workflow > Save and Exit

This screenshot shows a kiosk interface with two questions. The first question is "2*. Do you have any food allergies?" with "Yes" and "No" buttons. The second question is "3*. Are you bringing a food item?" with "Yes" and "No" buttons. At the bottom, there are two buttons: "Complete Workflow >" and "Save and Exit".

Step 8

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

Please enter your phone number

Are you Mason Yoder?

Yes No

7 8 9 0 X

Start Over English

This screenshot shows a kiosk interface with a phone number entry screen. The main text is "Please enter your phone number". There is a QR code in the top right corner with the text "SCAN TO ACCESS KIOSK". A confirmation dialog is displayed in the center, asking "Are you Mason Yoder?" with "Yes" and "No" buttons. Below the dialog is a numeric keypad with buttons for 7, 8, 9, 0, and X. At the bottom left is a "Start Over" button, and at the bottom right is a language selection button labeled "English".

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.

M Mason Yoder

DEMO

Demo Test

Dashboard

Visitors

Users

Current Check-Ins

Check-In Reports

People

Notifications

Resources

Workflows

Hubs





Assignments

Automations

Approvals

Expirations

Automations ⓘ

Workflow	Trigger	Assigned To	Due Date	Actions
Bringing Food Item	Custom Criteria	Previous Workflow User	1 Day(s) after assignment	 
Allergy - (1)	Custom Criteria	Previous Workflow User	1 Day(s) after assignment	 

Showing 1 to 2 of 2 entries

Show 10 entries Previous 1 Next