

InfoCapture scenario: Creating time-based triggers

Introduction

In this guide, we will give you step-by-step instructions on how to create a notification trigger that is attached to a time-based condition set.

A time-based trigger can be used for various scenarios. For example, you may need to send a notification X days BEFORE or AFTER or ON a specific DATE. Or there may be an additional condition where a notification has to be sent X days after a ticket has remained with the same Ticket Handler or Status.

For this scenario, we will set up a trigger for when the ticket has been submitted but not assigned to a ticket handler after X number of days.

Follow the 9 steps below to set up time-based triggers

Create a field

1. To start, add a 'Date' field to your InfoCapture form.

Fields properties

Properties Style Constraints

Name Review Start Date

Symbolic name date Edit

Optional Hint

Type Date (DD-MM-YYYY)

Default value {now}

Use current date as default

Required

Disabled

Reload form on changing

Save Delete

You can configure the field to default to the 'Current date' or leave the default value -empty- so users can manually select the date.

For this example, we will have the field default to the current date in order to capture the date when the ticket was submitted.

Create a condition set

2. Next, create a field condition for the Date field.

The screenshot shows the 'Field condition sets' configuration page. On the left is a sidebar with navigation options: Project options, Project Summary, Edit project properties, Project permissions, Statuses, Conditions, Field condition sets (highlighted), Triggers, Behaviour, and Field visibility. The main content area is titled 'Field condition sets' and includes a descriptive text box and a table of existing condition sets. A red arrow points to a green '+ Add new condition set' button.

Name / Order #	Field conditions	Use for fields rights	Use for workflow	Use for SLA
Default (Always)		Yes	Yes	Yes
Default (Being reported)	Being reported	Yes	Yes	Yes
Status = New	STATUS IN (New)	Yes	Yes	Yes
Status = In progress	STATUS IN (In progress)	Yes	Yes	Yes
Status = Closed	STATUS IN (Closed)	Yes	Yes	Yes

3. Define the rules for the Date field.

In this example, the rule is set for (1) the Date field to apply after 5 days from the current date AND (2) the Assign To field for 'Unassigned'.

[TEST] Form A

Properties of Field condition set

Name:

- Use for fields rights
- Use for workflow
- Use for SLA

Field Conditions

Name	Type	Value
<input checked="" type="checkbox"/> Review Start Date	Date (DD-MM-YYYY)	<input type="radio"/> Is between <input type="radio"/> Current date is on or after <input checked="" type="radio"/> Current date is <input type="text" value="5"/> Days <input type="text" value="After"/>
<input type="checkbox"/> Status	New In progress Closed	
<input checked="" type="checkbox"/> Assigned		<input type="text" value="- not assigned -"/> Abigail Clark Alan Metcalfe Atison Kelly

Trigger Create a trigger for this condition (the trigger will have the name as this condition set)

The above settings indicate that this condition will only apply when both rules are met. The condition set will not apply when only 1 of the 2 of the rules is met.

Please note: Unlike other field conditions, date-based conditions will only update once every day.

4. Make this condition set a Trigger by checking the following option.

[TEST] Form A

Properties of Field condition set

Name

Use for fields rights
 Use for workflow
 Use for SLA

Field Conditions

Name	Type	Value
<input checked="" type="checkbox"/> Review Start Date	Date (DD-MM-YYYY)	<input type="radio"/> Is between <input type="radio"/> Current date is on or after <input checked="" type="radio"/> Current date is <input type="text" value="5"/> <input type="text" value="Days"/> <input type="text" value="After"/>
<input type="checkbox"/> Status		<input type="text" value="New"/> <input type="text" value="In progress"/> <input type="text" value="Closed"/>
<input checked="" type="checkbox"/> Assigned		<input type="text" value="- not assigned -"/> <input type="text" value="Abigail Clark"/> <input type="text" value="Alan Metcalfe"/> <input type="text" value="Alison Kelly"/>
<input type="checkbox"/> Only when ticket is submitted		

Trigger Create a trigger for this condition (the trigger will have the name as this condition set)

Selecting the 'trigger' checkbox will automatically create a trigger that is directly matched to the condition set you have created.

5. Save the condition set.

Date Condition	ASSIGNED TO IN (- not assigned -)	<input type="button" value="Delete"/>
	CURRENT DATE IS 5 days after Review Start Date	

Upon saving the condition set, you will see the new field condition outlining the rules you have configured.

Confirm the trigger

6. Head to the Triggers section to find the new trigger that was created from the condition set.

Triggers

Name / Order #	Rules	Use for dynamic fields changes	Use for notifications	Notification type	
Default (Being reported)	Condition was not: Default (Being reported) Condition is now: Default (Being reported)	Yes	Yes	Email	<input type="button" value="Delete"/>
Date Condition	Condition was not: Date Condition Condition is now: Date Condition	Yes	Yes	Email	<input type="button" value="Delete"/>

7. Click into the trigger where the following settings should already be in place.

No further changes will be required.

Trigger properties

Name:

Rules

Name	Value
<input type="checkbox"/> Ticket activity	<input type="radio"/> New ticket submitted <input type="radio"/> Public or private note has been added <input type="radio"/> Public note has been added <input type="radio"/> Private note has been added <input type="radio"/> File uploaded
<input type="checkbox"/> Any of the following fields changed	<input type="text" value="Review Start Date (date)"/> <input type="text" value="STATUS"/> <input type="text" value="ASSIGNED TO"/>
<input type="checkbox"/> None of the following fields changed	<input type="text" value="Review Start Date (date)"/> <input type="text" value="STATUS"/> <input type="text" value="ASSIGNED TO"/>
<input type="checkbox"/> Condition was	Default (Always) <input type="button" value="v"/>
<input checked="" type="checkbox"/> Condition was not	Date Condition <input type="button" value="v"/>
<input checked="" type="checkbox"/> Condition is now	Date Condition <input type="button" value="v"/>
<input type="checkbox"/> Condition is not now	Default (Always) <input type="button" value="v"/>

Notification type: In-system Email
This setting only has an effect if you use this trigger to send notifications.

If you wish, you can change the Notification type to either 'Email' or 'In-system' notification.

Create a notification


8. Create a notification rule for the Date field trigger.

Advanced notifications

Configure email notification to inform users about changes in the tickets.

This is dependent on Triggers having first been added. The second action must be to either create a Notification Template or visit the Default Notifications Field page, to define the content of your email notifications when they send.

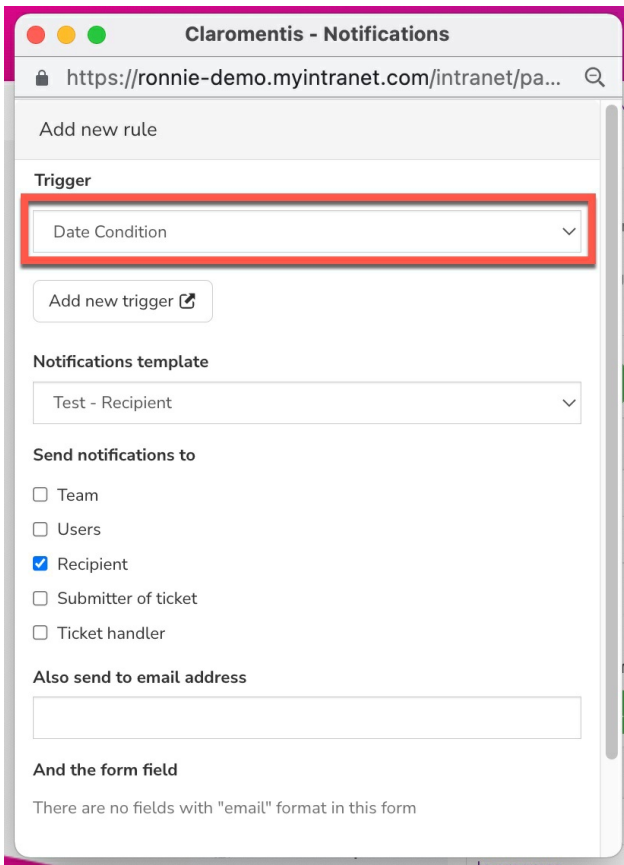
For a chosen Trigger, an email notification can be sent to project roles, individual email addresses, or user pickers on your form. For example, a trigger of 'New Ticket Submitted' could generate an email to a project role called 'Approvers', with a notification template asking the role's users to approve the ticket.



Trigger	Notification type	Notification template	Send notifications to

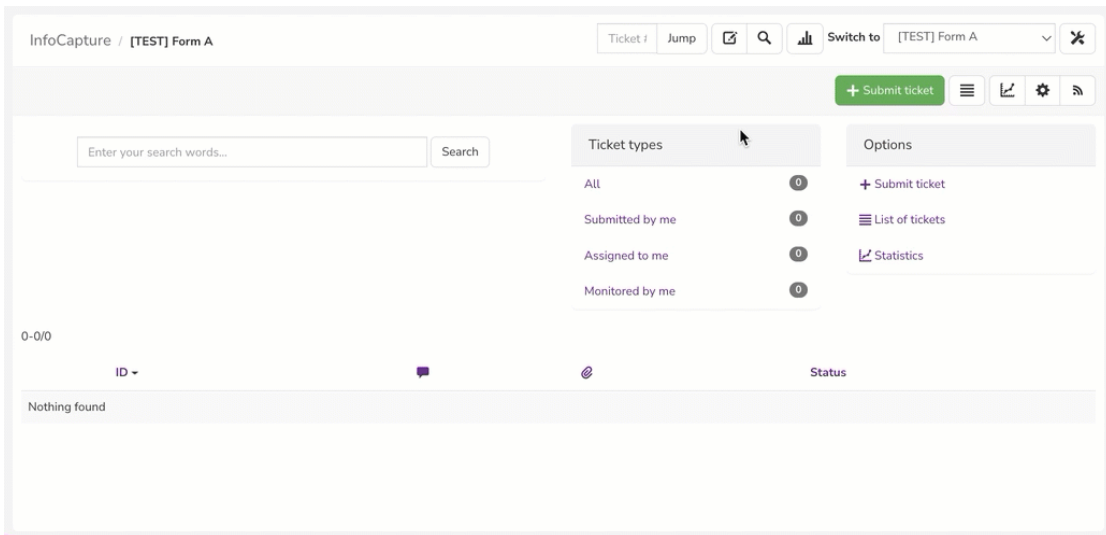
9. Select the Trigger for the notification. Ensure you also select the relevant Notification Template and notification recipient(s).

In this example, I have selected a custom notification template and the Project role: Recipient to receive the notification when this trigger is met.



Submitting tickets

When tickets are submitted, the Date field will auto-populate with the present date.



A notification will now be generated after 5 days from the submission date AND if the ticket has not yet been assigned a ticket handler.

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