



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.

A screenshot of the 'Fields properties' dialog box in InfoCapture. The 'Properties' tab is selected. The 'Name' field is 'Review Start Date'. The 'Symbolic name' is 'date' with an 'Edit' link. The 'Optional Hint' field is empty. The 'Type' dropdown is set to 'Date (DD-MM-YYYY)' and is highlighted with a red rectangle. The 'Default value' is '{now}' with a calendar icon. Below this, there are three checked checkboxes: 'Use current date as default', 'Required', and 'Disabled'. There is also an unchecked checkbox for 'Reload form on changing'. At the bottom right are 'Save' and 'Delete' buttons.

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.

Project options

Project Summary

Edit project properties

Project permissions

Statuses

Conditions

Field condition sets

Triggers

Behaviour

Field visibility

Field condition sets

Set true or false statement based on whether or not a condition is currently being met within your form.

Field condition sets are used in four places: 'Field visibility', 'Workflow', 'SLAs', and sometimes in 'Triggers'. These four functions are dependant upon conditions being met, which are defined here. Two conditions are included by default with new projects: 'Default (always)' is a condition that is always being met. This is useful for field visibility. 'Default (being reported)' is a condition that is met only while the user is submitting the form.

+ Add new condition set

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

Date Condition

☐ 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)	<div><div><input type="radio"/> Is between</div><div><input type="radio"/> Current date is on or after</div><div><input checked="" type="radio"/> Current date is</div><div>5</div><div>Days</div><div>After</div></div> <div>Caution: unlike other field conditions, date-based conditions will only update once every day, in the morning.</div>
<input type="checkbox"/> Status		<div>New</div> <div>In progress</div> <div>Closed</div>
<input checked="" type="checkbox"/> Assigned		<div>- not assigned -</div> <div>Abigail Clark</div> <div>Alan Metcalfe</div> <div>Alison Kelly</div>

☐ Only when ticket is submitted

Trigger

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

Save

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.

Properties of Field 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.

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.

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	Review Start Date (date) STATUS ASSIGNED TO
<input type="checkbox"/> None of the following fields changed	Review Start Date (date) STATUS ASSIGNED TO
<input type="checkbox"/> Condition was	Default (Always) ▼
<input checked="" type="checkbox"/> Condition was not	Date Condition ▼
<input checked="" type="checkbox"/> Condition is now	Date Condition ▼
<input type="checkbox"/> Condition is not now	Default (Always) ▼

Notification type ☐ In-system ☒ Email

This setting only has an effect if you use this trigger to send notifications.

Save Save as copy

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.

[+ Add new rule](#)

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.

Claramentis - Notifications

https://ronnie-demo.myintranet.com/intranet/pa...

Add new rule

Trigger

Date Condition

Add new trigger

Notifications template

Test - Recipient

Send notifications to

☐ Team

☐ Users

☒ Recipient

☐ Submitter of ticket

☐ Ticket handler

Also send to email address

And the form field

There are no fields with "email" format in this form

Submitting tickets

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

InfoCapture / [TEST] Form A

Ticket | Jump | Search | Switch to [TEST] Form A

+ Submit ticket

Enter your search words... Search

Ticket types

All	0
Submitted by me	0
Assigned to me	0
Monitored by me	0

Options

- + Submit ticket
- List of tickets
- Statistics

0-0/0

ID - Status

Nothing found

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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