



ZapU
Tasks & Workflows:
Part 2

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Zaptic Tasks & Workflows

Continuing on from the first Tasks & Workflows guide, this covers:

- Moving the order of questions and steps
- Rearranging the flow of questions using Routing
- A deeper understanding of General Settings
- Advanced Zaptic functionality: Subsections
- Advanced Zaptic functionality: Subtasks


1. Review previous

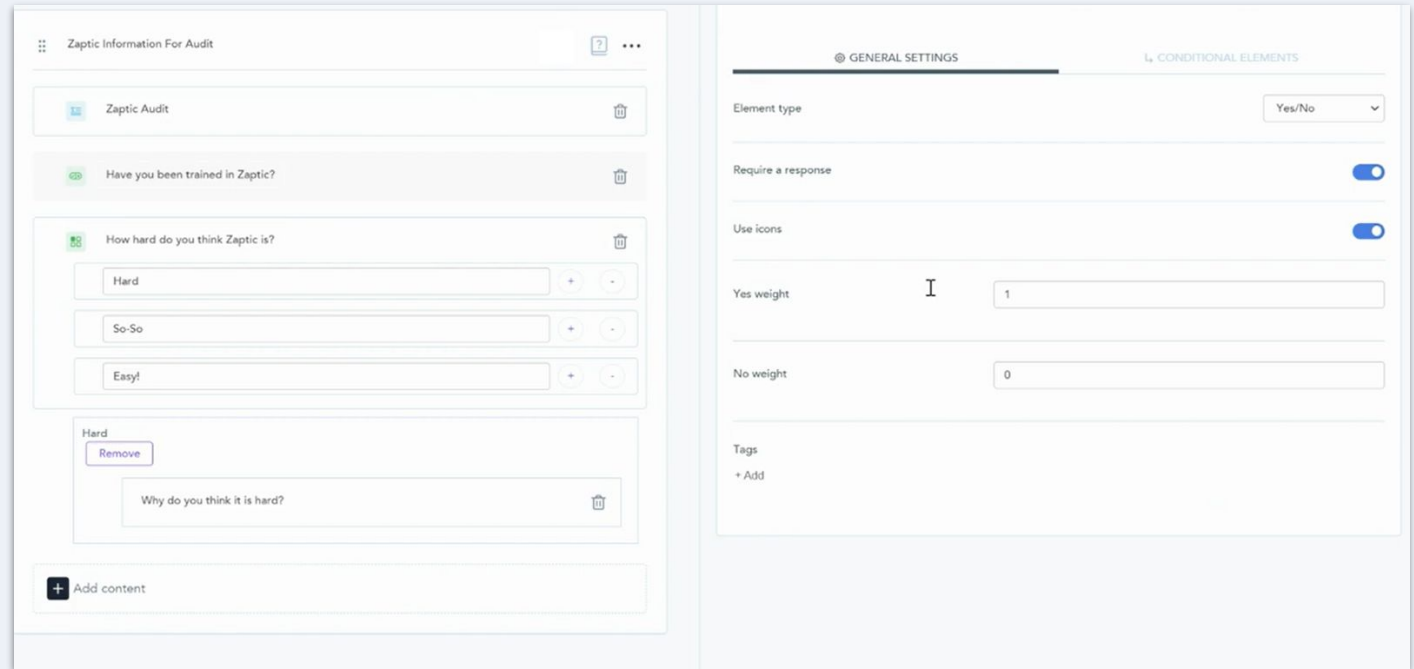
- This task shows a form with a text content, 2 questions, & 1 conditional element.
- In this example we want to rearrange this flow to ask a series of questions **only** if the user has been trained.
- To do so, we will need to use Zaptic's **Routing** capability.
- This is available with this button

The screenshot shows the Zaptic Audit task editor. The main workspace displays a form titled 'Zaptic Information For Audit' with the following elements: a 'Zaptic Audit' header, a 'Have you been trained in Zaptic?' question, a 'How hard do you think Zaptic is?' question with three radio button options ('Hard', 'So-So', 'Easy!'), and a 'Hard' section with a 'Remove' button and a text input field labeled 'Why do you think it is hard?'. A '+ Add content' button is at the bottom. The right sidebar shows the 'GENERAL SETTINGS' tab with options for 'Element type' (Yes/No), 'Require a response' (checked), 'Use icons' (checked), 'Yes weight' (1), and 'No weight' (0). The top navigation bar includes 'Steps', 'Schedules', 'Triggers', and 'Settings' tabs, along with 'Preview', 'Saved', and 'Close' buttons.



2. Moving questions

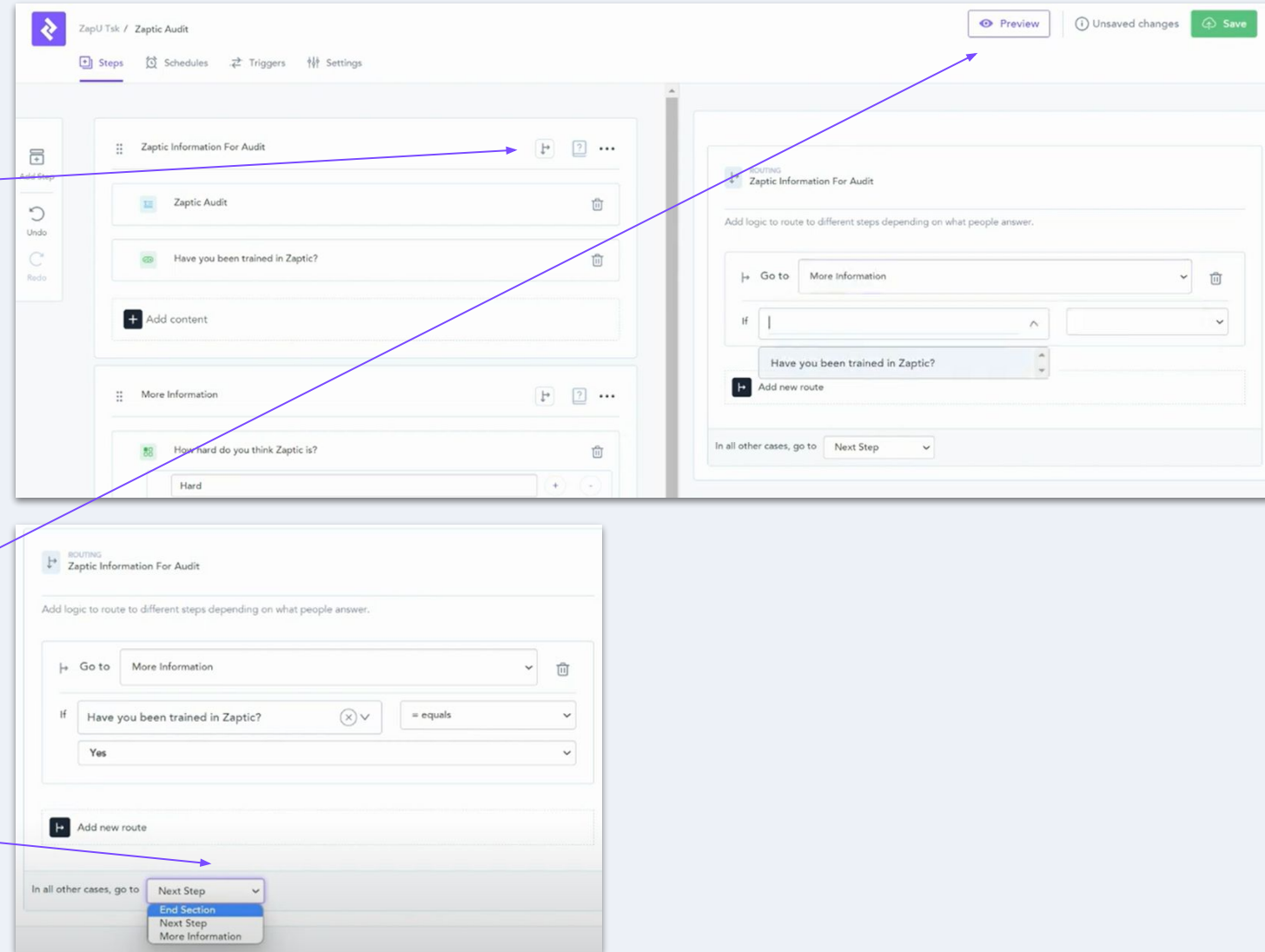
- Currently, all of these questions are in one single step. However, **routing** will send the user to different steps based on their answers. So, we will need to create more steps.
- We first want to move this 3rd question. Zaptic allows you to **drag and drop** questions between steps and even steps between each other using this button. 



The screenshot displays the Zaptic interface for editing a form titled "Zaptic Information For Audit". The main editor area on the left contains a list of questions: "Zaptic Audit", "Have you been trained in Zaptic?", and "How hard do you think Zaptic is?". The third question is expanded, showing a rating scale with options "Hard", "So-So", and "Easy!". Below the scale is a "Remove" button and a text input field labeled "Why do you think it is hard?". At the bottom of the editor is an "Add content" button. On the right, the "GENERAL SETTINGS" panel is visible, showing options for "Element type" (set to "Yes/No"), "Require a response" (checked), "Use icons" (checked), "Yes weight" (set to 1), "No weight" (set to 0), and a "Tags" section with an "Add" button.

3. Routing

- When you click on the Routing information it shows you the **options** available for that step.
- You can select the question you need to ask and the **trigger** for what happens when selected.
- With the routing in place, don't forget to use the "**Preview**" button to see how this will look in the app.
- If you simply want to jump over or bypass 1 or more steps, select the name of the step that you do want to go to.
- When you want the flow to end, choose "**End Section**".
- As always, don't forget to press the "**Save**" button.



4. Advanced Zaptic content: Sections

- You can add in sub **Sections** which allows you to condense multiple questions into a single link for the user to expand when they are ready to answer those questions.
- By clicking “**Go to section**” you will be taken to the sub section.
- You can refine the responses to these questions under ‘**General settings**’ to make answers mandatory ‘**Require a response**’ or include **Minimum** or **Maximum** responses.

The screenshot displays the Zaptic interface for configuring advanced content. At the top, a 'More Information' header is visible. Below it, a question 'How hard do you think Zaptic is?' is shown with three response options: 'Hard', 'So-So', and 'Easy!'. Each option has a '+' and '-' button. A 'Remove' button is located below the 'Hard' option. A text input field labeled 'Why do you think it is hard?' is also present. A sidebar menu on the left lists various content types: Text Content, Video, ADVANCED (Content Loop, Link, Section, Subtask). The 'Section' option is highlighted. At the bottom, a 'Zaptic Training Information' section contains a 'Go to section' button with a right arrow.

5. Advanced Zaptic content: Sub Task

- A sub **Task** allows you to call an already created task within the instance.
 - You can select this within the dropdown.
- Don't forget to "**Save**" and then "**Preview**".
- As you'll see from the sub Task, clicking on the link takes you to an entirely new task within the app which can provide different information.
- This allows you to submit a **task** within a **task**.

The screenshot shows the 'Zaptic Task / Zaptic Audit' editor. The top bar includes 'Preview', 'Unsaved changes', and 'Save' buttons. The main area is divided into 'Steps', 'Schedules', 'Triggers', and 'Settings' tabs. The 'Steps' tab is active, showing a list of steps: 'How hard do you think Zaptic is?' (with radio buttons for Hard, So-So, Easy!), 'Zaptic Training Information' (with a 'Go to section' button), and 'Start More Zaptic Training!' (with a dropdown menu). The 'Settings' tab is also visible, showing 'GENERAL SETTINGS' with options like 'Element type' (set to Subtask), 'Require a response' (toggle), 'Allow to add multiple reports' (toggle), and 'Tags' (+ Add).

The screenshot shows the 'ZAPTIC AUDIT' task execution screen. It has a 'Done' button in the top right. The content includes: 'Zaptic Information For Audit', 'Zaptic Audit', 'This will test your Zaptic capability', a progress bar for 'Have you been trained in Zaptic?' (1/0), 'More Information', and a section for 'How hard do you think Zaptic is?' with radio buttons for Hard, So-So, and Easy!. Below this is a 'Zaptic Training Information' section with a 'Completed' status and a green checkmark. At the bottom is a large blue button labeled 'Start More Zaptic Training!'.

6. General Settings

- Each question will allow you to provide more options for each question as you're setting the question up.
- Each General Setting is different based on the question type.

For example:

- You may want to make the question mandatory (Require a Response).
- You can also Allow multiple selection on multiple choice questions.
- With Yes/No questions you can also apply weighting to the responses, and choose to replace words with icons.

The screenshot displays the 'GENERAL SETTINGS' tab for a question configuration. The 'Element type' is set to 'Multiple Choice'. Three toggle switches are visible: 'Require a response' (enabled), 'Set response as report title' (enabled), and 'Allow multiple selection' (disabled). Below these is a 'Tags' section with a '+ Add' button. A separate section titled 'Use icons' contains input fields for 'Yes weight' (set to 1) and 'No weight' (set to 0).

| Setting | Value / State |
|------------------------------|-----------------|
| Element type | Multiple Choice |
| Require a response | Enabled |
| Set response as report title | Enabled |
| Allow multiple selection | Disabled |
| Tags | + Add |
| Use icons | |
| Yes weight | 1 |
| No weight | 0 |

Objective

This course covered the Zaptic Procedure Tasks and Workflows.



What this course covered

Continuing on from the first Tasks & Workflows guide, this covered:

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- Rearranging the flow of questions using Routing
- A deeper understanding of Subsections
- A deeper understanding of General Settings
- A deeper understanding of Subtasks



Thank you!

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