



Schedules, Triggers and Settings

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Schedules, Triggers and Settings

- Assigning Schedules to existing workflows
- Creating personalised Triggers
- Report Status - Settings

Procedure - Scheduling

The screenshot shows the 'Daily Operating Task' configuration page. At the top, there are tabs for 'Steps', 'Schedules', 'Triggers', and 'Settings'. The 'Schedules' tab is active, showing a list of schedules. A purple box highlights the 'Daily Operating Task' with a frequency of 'Every day'. Arrows point from this box to labels 'Schedule Name' and 'How often it runs'. To the right, there are buttons for 'Preview', 'Unsaved changes', and 'Save'. A purple arrow points to the 'Save' button. Below the schedule list, there is an 'Add schedule' button. A purple arrow points from this button to a modal window titled 'Filler CIL (Weekly)'. The modal window contains the following fields: 'Assign to' (set to 'Technicians (Level 1)'), 'Team completion options' (with radio buttons for 'Only one assignee needs to complete' (selected), 'One assignee from each team needs to complete', and 'All assignees need to complete'), 'How often' (set to 'Daily' every '1' day), 'Starting' (set to 'Tomorrow' at '12 AM'), 'Time to complete task is' (set to '12' hours), and 'Report Subject' (set to 'Filler (Line 1)'). A purple box on the right side of the modal contains the text 'Assigned Teams', 'Completion Requirements', 'Schedule details', and 'Subject of task', with arrows pointing to the corresponding fields. At the bottom of the modal are 'Schedule' and 'Cancel' buttons. In the bottom left corner, there is a blue box with the text 'Tasks that are automatically submitted will not be signed off.' and two checkboxes: 'Allow tasks to be signed off.' and 'Automatically submit the task after the due date'.

SCHEDULES

Daily Operating Task Every day

Schedule Name **How often it runs**

Assigned Teams
Completion Requirements
Schedule details
Subject of task

Tasks that are automatically submitted will not be signed off.

Allow tasks to be signed off.

Automatically submit the task after the due date

Filler CIL (Weekly)

Assign to
Tasks can only be assigned to teams/team members added to this procedure.

Technicians (Level 1)

Team completion options

☒ Only one assignee needs to complete
☐ One assignee from each team needs to complete
☐ All assignees need to complete

How often
Daily every 1 day


Starting
Tomorrow 12 AM

Time to complete task is 12 hour

Report Subject
Filler (Line 1)

Schedule Cancel

Procedure - Triggers

 TAG > TAG

[Steps](#) [Schedules](#) [Triggers](#) [Settings](#)

[Preview](#) [Saved](#) [Close](#)

Active

Inactive

Automatic Escalation

...

Add Trigger

There can be multiple triggers as needed

Trigger name

Triggers are automated events that happen based on a combination of defined criteria being met.

Status Change

Trigger conditions

Choose when your trigger should run:

A new report is submitted

OR

A report status is changed

You can add conditions that must be met for the trigger to run. The trigger will run if and only if every condition in any group is fulfilled

Element Answer

Can you resolve this yourself?

Equal to

Yes

+ AND

+ OR

Trigger behaviour


Select the type of trigger you want to send

Status

Set status to

Closed

4



Procedure - Task Settings

Settings allow you to create custom statuses to allow you to organise your report.

You can choose to request identity authentication from your users when they complete a task.

This is double authentication - the user will have already authenticated upon initial login and this requires them to enter their password details again so it's good for use cases that need an additional level of compliance or sign off e.g. quality checks.

Task settings

Report Status

Create custom statuses for organising your reports.

Status name	Set as default i
Complete	<input checked="" type="radio"/>
<div>+ Add status</div>	

Authentication i

Request identity authentication upon completing task

i The option to automatically close tasks after the due date will be disabled when the report sign off is active.

Objective

This course covered the Zaptic
Schedules, Triggers and Settings



What this course covered

1. Assigning Schedules to existing workflows
2. Creating personalised Triggers
3. Report Status - Settings



Thank You

