

Actions on Transitions Overview

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Overview

Actions on transitions (not to be confused with actions on activities) allow you to include additional automated processes as an object moves through its workflow states. These processes include:

- **Messaging:** Sends individual emails to users within the selected roles immediately following an object's transition or as a daily email digest. Administrators can select a default or custom email template, as well as which configurable form is displayed when the user clicks the links provided in the email to view the object.
- **Role Management:** Automatically adds a user within a specified role with explicit permissions to the object once it has successfully transitioned into its next state. This action is used to allow users within the role the ability to view objects in their next states without adding them manually through the [role element](#) on a configurable form. For example, Role Management could be used should your organization wish to allow users in the Incident Creator role to be able to automatically view the incident objects they just created while those objects are in the In Review state.
- **Send Orchestration Event:** Moves multiple objects in different states or from different object types into another state. For example, when this action is added to the Audit object type, closing an audit object will also close all open issues. Once an event action has been created, a Consume Orchestration Event trigger is added to the other object types/states that will use the event. The object types this action can be added to is determined by the data definition selected when the action is created.
- **Clear Fields/Roles/Relationships:** Clears the values from selected fields, roles, or relationships on a form. These actions are helpful when users want to relaunch an assessment, but don't want to manually clear previous assessment data. Note that you cannot use this action to clear formula data.
- **Set Field Value:** Auto-completes a **Date & Time** or **Select List** field. For select lists, administrators can choose which option is auto-populated. For date and time fields, admins can auto-populate the current date, the current date plus a selected number of days, or the current date less a selected number of days. This action could be used to set time stamps for start or completion dates on assessments, set deadlines, extend deadlines, etc.
- **Create Object:** Creates a relationship or reference object when a trigger is clicked on a form. All fields will be blank, with the exception of any [Name/Description](#) or [plain text field](#) concatenations that may have been configured on the relationship or reference object type.
- **Pull Data Values:** Copies field values or relationships from related objects. To copy field

values, the same fields must be added to both object types as components, while relationships must meet certain requirements. Object properties and the

Attachment and **Image Attachment** fields are not supported in this action

- **Update Field Concatenations:** Allows Administrators to update object names beyond the Creation state.

Required Information/Setup

To add an action to a transition, see the following articles:

- [Add a Messaging Action to a Transition](#)
- [Add a Role Management Action to a Transition](#)
- [Add a Send Orchestration Event Action to a Transition](#)
- [Add a Clear Fields, Roles or Relationships Action to a Transition](#)
- [Add a Set Field Value Action to a Transition](#)
- [Add a Create Object Action to a Transition](#)
- [Add a Pull Data Values Action to a Transition](#)
- [Add an Update Field Concatenations Action to a Transition](#)



Note:

Multiple actions are not necessarily executed in the order they appear on a transition. There is currently no option to force actions to execute in a specific order.