

Creating a Date-Based Trigger

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Overview

The Date-based Triggers feature allows an Administrator to set up Triggers based on a date Field or a Formula that produces a date variable.

Date-based Triggers run on the Field or Formula date associated with the Trigger, help decrease the number of Triggers that run nightly and improve system performance.

Caution: Please contact your CSM in regards to switching Nightly Triggers to Date-Base Triggers.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to create a Date-Based Trigger.

Related Information/Setup

- Date/Time Fields and Formulas are currently not supported. The system automatically filters out all time-related Fields and Formulas for the Date Field/Formulas dropdown menu.
- A system **Warning** will pop up when a user attempts to delete or unlink a Field or Formula that is part of a Date-base Trigger.
- The Data Audit Trial will list all Date-based Trigger records.
- The Date-base Triggers procedure will run once a day before the Nightly Triggers procedure.
- Recover procedures are in place encase an error occurs during the Date-base Triggers procedure.

Please follow the link below for more information on Triggers.

- Add a Nightly Trigger and Transition to a State
- Orchestration Event Action in Resolver Core
- Add a Create Object Action in Resolver Core

Limitations:



• Currently, the Date-base Trigger procedure will process up to 1000 Triggers per Org nightly. Any remaining Triggers that are not processed will be processed as part of the Date-base Trigger procedure the next night.

Navigation

1. From the *Home* screen, click on the **Administration** icon.



Administration Icon

2. From the *Admin Overview* screen, click on the **Object Types** tile under the *Data Model* section.

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Object Type Tile

3. From the *Admin Object Types* screen, select an **Object Type**.



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AT	Activity Type									
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AC	Alert Catalogue The alert catalogue a	llows the compliance	e team to report on all req	gulatory						
A	Announcement A generic broadcast	message from an ad	ministrator to Portal User	'S.						
A	Asset Defined-value library	/ asset information re	ferenced as material to a	negativ						

Object Type

4. From the *Admin Edit Object Type* screen, click on the **Configure Workflow** button.

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Configure Workflow Button

5. From the *Admin Edit Workflow* screen, click on an + **Add Trigger** link under one of the listed **States**.



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+ Add Triggers Link



Creating a Date-Based Trigger

An Administrator can create a Date-based Trigger from the **Add Trigger** screen.

1. From the *Add Trigger* pop-up, select **Timed** from the **Type** field dropdown menu.

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Type Field

- 2. Enter a Trigger Name in the Name field.
- 3. (Optional) Description, Color, and Icon are optional fields.
- 4. Select **Scheduled** from the **Frequency** field dropdown menu.



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Frequency Field

5. Select a Field or Formula from the Date Field/Formula field dropdown menu.

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Date Field/Formula Field

6. Click the **Create** button to create the Date-Based Trigger.