

Adding a Clear Fields Action to a Transition

Last Modified on 09/11/2024 2:07 pm EDT

Overview

The **Clear Fields** action clears the values from selected fields on a form (excluding formulas). This is particularly helpful to users who are working with existing assessments because they avoid the need to go into the assessment and manually remove data that's no longer applicable.

For example, the **Clear Fields** action could be used when a user is relaunching an assessment.

Before you can create this action on a workflow state, the fields must be added to the object type as components and a transition must be created.

User Account Requirements

The user must have Administrator permissions to access the *Admin Overview* screen.

Required Information/Setup

Please refer to the Add a Trigger & Transition to a State article for instructions on how to add triggers and transitions.

Please refer to the Roles and Workflow Permissions sections for more information on configuring roles and workflow permissions.

Navigation

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

		(Q Search	000	\$ \$
Home	✓ My Tasks			
	My Tasks	¢ sort ∽ Q search		



Administration Icon

2. From the Administrator Settings menu, click Admin Overview.

		(Q Search	•••	0	0 L
Home	✓ My Tasks			Admin Overview	
				Settings	
	My Tasks	\$ SORT Q SEARCH		綘 User Management	
				Branding	
				▲ Languages	

Administrator Settings Menu

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

		(-	Q Search			•••		\$ @ L
Admin Overview	*							
	Data Model			Views				
	Object Types		Object Type Groups	Configurable Forms		LIII Data Visualizations		
	Fields	Assessments	Data Definitions	Dashboard Data Sets	Dashboard Builder			
	People			Application Mai	nagement			
	User Groups	Roles		Org Manager	Applications	Dashboard Deployment		

Object Types Tile

- From the *Object Types* screen, enter an object type name in the **Search** field to narrow down the object types list.
- 5. Click the object type name you want to edit.



				•	Q Search			\$ @ L	
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition			
		Admin	:Object Types	5			+ CREATE OBJECT TYPE		
	Q, Search								
		Act	Activity						
		AT	Activity Type						
		А							

Object Type Name

6. From the *Edit Object Type* screen, click a workflow under the **Workflow** tab.

			⊕ (Q	Search		•••		\$	02
Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
	Admin:	Edit Object T	уре						
	Activity						1		
	Act							_	
	Workflow	Concatenations							
	Workfle	DW IFIGURE WORKFLOW							

Workflow Tab

7. If there are no workflows listed, click the **Configure Workflow** button.

			÷ (Q Search					\$ @ L
Data Model	~ _ (Object Types	Object Type Groups	Fields	Assessments	Data Definition			
	Admin	:Edit Ob	ject Type						
	Activity							1	
	Act								
	Workflow	Concatena	itions						
	Workfl	low	ow						



Add a Clear Fields Action to a Transition

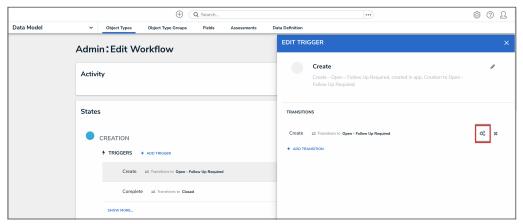
 From the *Edit Workflow* screen, click the trigger that you want to add the Clear Fields action to.



		⊕ (•	Q Search		•••	\$ @ L
Data Model	✓ Object Types	Object Type Groups	Fields Assessme	nts Data Definition		
	Admin:Edit	Workflow				
	Activity				1	
	States				REORDER + ADD STATE	
	* TRIGGERS	+ ADD TRIGGER			CREATION STATE 0 REQUIRED COMPONENTS	
	Crea	te Transitions to Open - Fol	low Up Required			
	Com	plete # Transitions to Closed				
	SHOW MORE.					

Workflow Trigger

2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.



Configure Icon

3. Click the Add Action button under Actions.

	(Q Search	•••)	\$ 0 L				
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition					
	Admin: Edit Workflow	EDIT TRIGGER					
		Name					
	Activity	Create					
	·····,	Destination State					
		 Open - Follow Up Required 	~				
	States	X Bypass Required Fields.					
	CREATION	CONDITIONS					
	* TRIGGERS + ADD TRIGGER	+ ADD CONDITION					
	Create 🛛 == Transitions to Open - Follow Up Required	ACTIONS					
	Complete = Transitions to Closed	Set Activity Owner	/ x				
	SHOW MORE	+ ADD ACTION					
	OPEN - FOLLOW UP REQUIRED		✓ DONE				
	TRIGGERS + ADD TRIGGER						

Add Action Button

4. Select **Clear Fields** from the **Type** dropdown menu.



	(Q Search		\$ @ L			
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition				
	Admin: Edit Workflow	EDIT TRIGGER				
		Open - Follow Up Required	~			
	Activity	Bypass Required Fields. 2				
		CONDITIONS				
	States	+ ADD CONDITION				
	CREATION TRIGGERS + ADD TRIGGER	ACTIONS				
	Create 🛛 = Transitions to Open - Follow Up Required	Туре	~			
	Complete == Transitions to Closed	Messaging Role Management Send Orchestration Event				
	SHOW MORE					
		Clear Fields				
	OPEN - FOLLOW UP REQUIRED	Clear Roles				

Type Dropdown

5. Enter a name for the action in the **Name** field.

		\oplus	Q Search				\$ ® \$			
Data Model	✓ Object Types	Object Type Groups	Fields	Assessments	Data	ta Definition				
	States					EDIT TRIGGER				
	CREATION					Open - Follow Up Required	~			
	TRIGGERS + ADD TRIGGER					Bypass Required Fields. 0				
	Create		llow Up Required	i .	CONDITIONS					
	Complet	e I Transitions to Closed	đ			+ ADD CONDITION				
	SHOW MORE					ACTIONS				
	OPEN - FOLLO	W UP REQUIRED			Туре					
	# TRIGGERS	+ ADD TRIGGER				Clear Fields	~			
	Capture Geolocation for Involved Location 😅 Transitions to Op					Name				
	Create Ir	ncident 🛛 🛱 Transitions to	Closed - Escalate	ed		Fields Q. Search Fields				
	SHOW MORE					CA	NCEL 🗸 CREATE			

Name Field

 Select the fields you wish to clear data from (once the object transitions) from the Fields dropdown menu.

	(Q. Search	··· 🗰 🖗 🖗 🖓
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition
	States	EDIT TRIGGER ×
		Open - Follow Up Required v
	TRIGGERS + ADD TRIGGER	Bypass Required Fields. 0
	Create 🛛 = Transitions to Open - Follow Up Required	CONDITIONS
	Complete 🛛 🛱 Transitions to Closed	+ ADD CONDITION
	SHOW MORE	ACTIONS
	OPEN - FOLLOW UP REQUIRED	Туре
	TRIGGERS + ADD TRIGGER	Clear Fields ~
	Capture Geolocation for Involved Location = Transitions to Open - Foll	Name Isou t
	Create Incident # Transitions to Closed - Escalated	Fields Q. Search Fields
	SHOW MORE	CANCEL CREATE



Fields Dropdown

7. Click the **Create** button.

			\oplus	Q Search				\$ @ L			
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Defi	ition				
	State	5				ED	T TRIGGER	×			
		CREATION					Open - Follow Up Required	~			
		# TRIGGERS	+ ADD TRIGGER			12	× Bypass Required Fields. 📀				
		Create	a	Follow Up Required		co	NDITIONS				
		Comp	ete 🛱 Transitions to Clos	ed		+ ADD CONDITION					
		SHOW MORE				A	TIONS				
	•	OPEN - FOLL	OW UP REQUIRED			Туре					
		# TRIGGERS	+ ADD TRIGGER				Clear Fields ~				
		Captu	re Geolocation for Involve	d Location ≓	Transitions to Open - Fol	owl					
		Create Incident III Transitions to Cleased - Escalated					elds				
								CANCEL CREATE			

Create Button

8. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.

	(Q Search		\$ @ L
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition	
Admin:Edit Workflow		EDIT TRIGGER	×
	Activity	Destination State Open - Follow Up Required Bypass Required Fields.	~
	States	CONDITIONS	
	CREATION	+ ADD CONDITION	
	TRIGGERS + ADD TRIGGER	ACTIONS	
	Create 🛛 🛱 Transitions to Open - Follow Up Required		
	Complete == Transitions to Closed	Set Activity Owner	/ ×
	SHOW MORE		e x
	OPEN - FOLLOW UP REQUIRED	+ ADD ACTION	✓ DONE
	TRIGGERS + ADD TRIGGER		

Done Button