

Add a Messaging Action to a Transition

Last Modified on 09/12/2024 4:04 pm EDT

Overview

The **Messaging** action sends an [email](#) to users within one or more selected roles once objects have successfully transitioned to the next state. To control the contents of the email, you can choose a [default](#) or [custom](#) email template and select which configurable form is displayed when the user clicks the link provided in the email to view an object. When creating this action, you must choose one of the following delivery frequencies:

- **Immediate:** Sends an email to users in the selected role(s) immediately following the object's transition.
- **Nightly:** Sends a single email to users in the selected role(s) with a list of the objects that transitioned. If additional nightly Messaging actions have been added to other workflows or object types, a single email digest with those objects will be sent to the user only if the same role and email template has been selected on each messaging action. If a different role and/or template has been selected for multiple workflows or object types, users may receive multiple nightly emails. See the [Timed Triggers & Nightly Emails Schedule](#) article for more information on when these emails are sent.

Before you can create this action on a workflow state, a transition must be created.



Note:

The role(s) added to the Messaging action must be properly configured for the selected object type and workflow state.

User Account Requirements

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

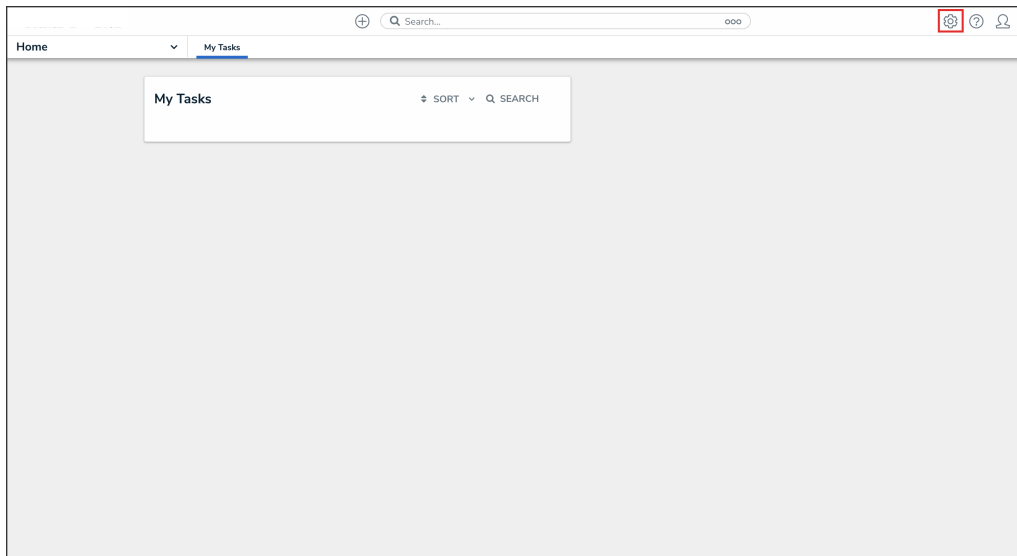
Required Information/Setup

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.

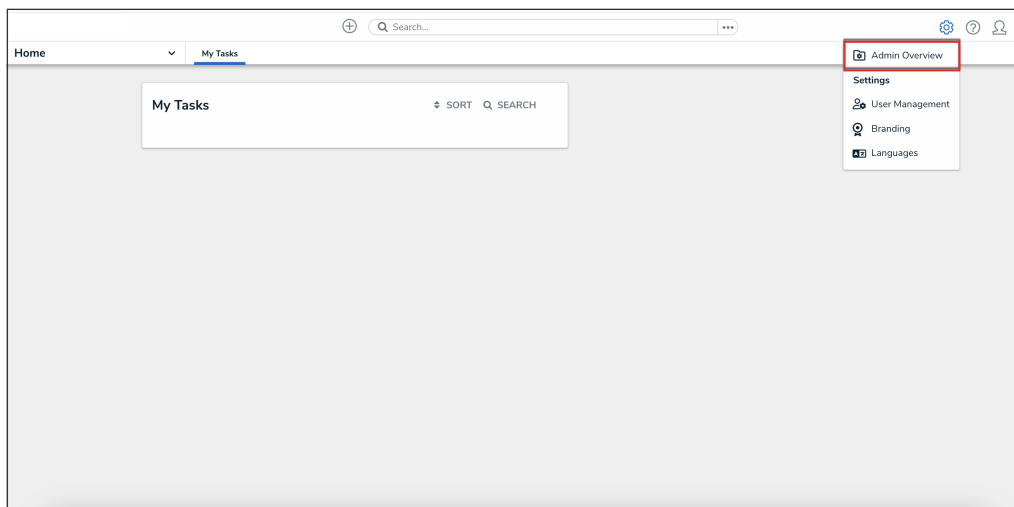
Navigation

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



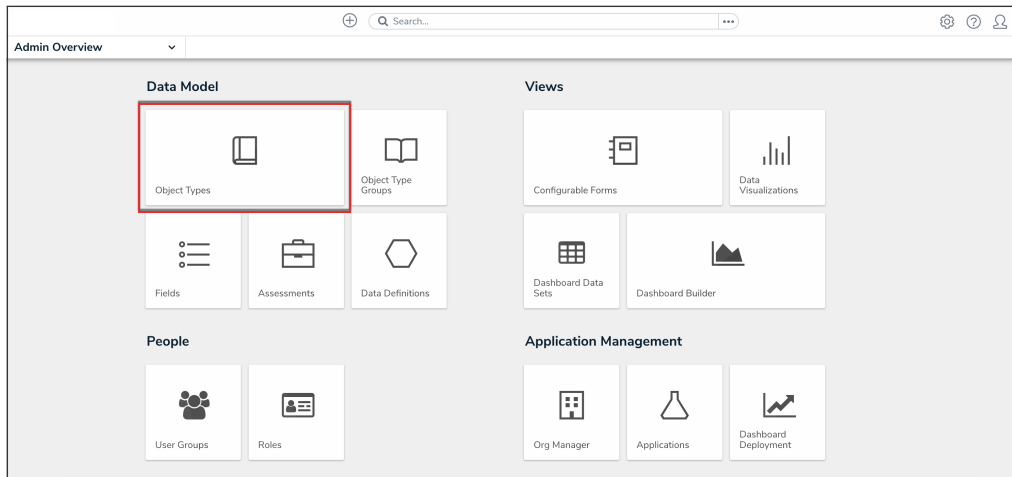
Administration Icon

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



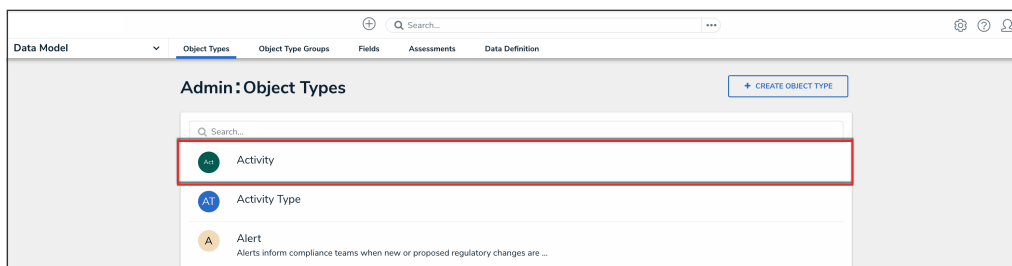
Administrator Settings Menu

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



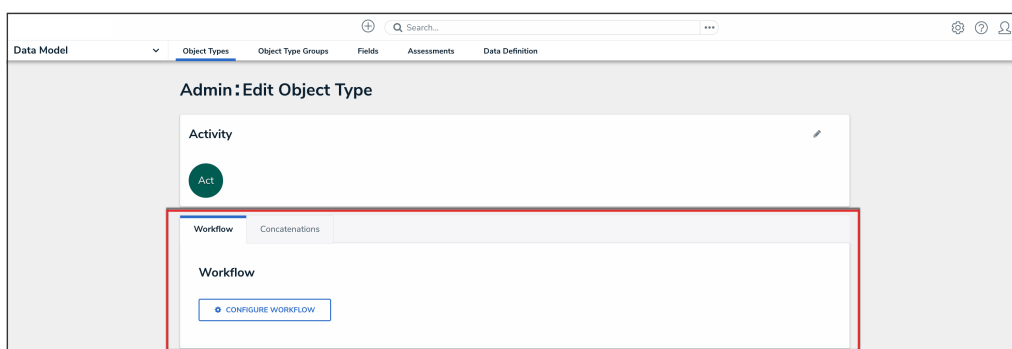
Object Types Tile

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



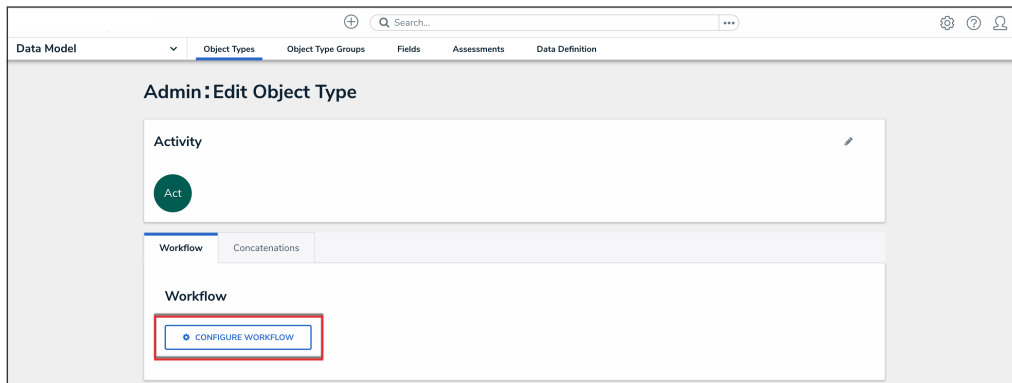
Object Type Name

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



Workflow Tab

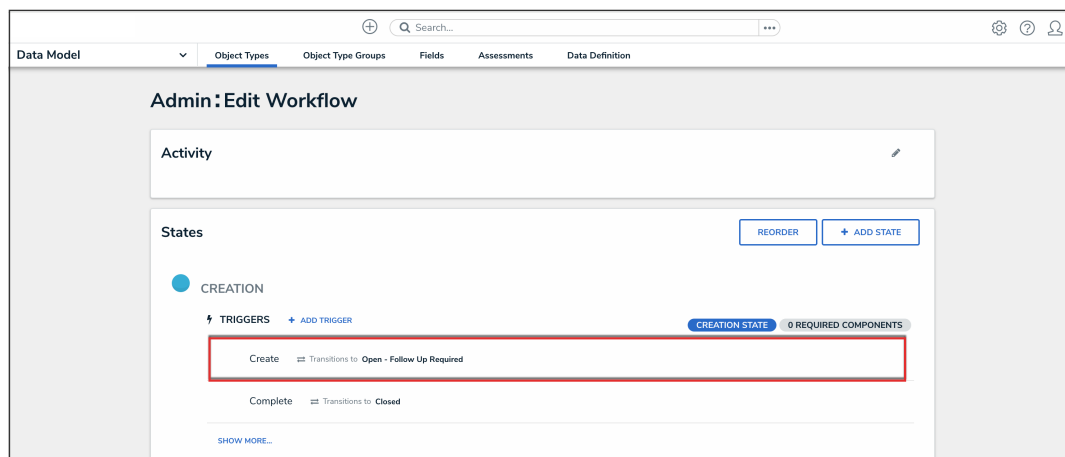
6. If there are no workflows listed, click the **Configure Workflow** button.



Configure Workflow Button

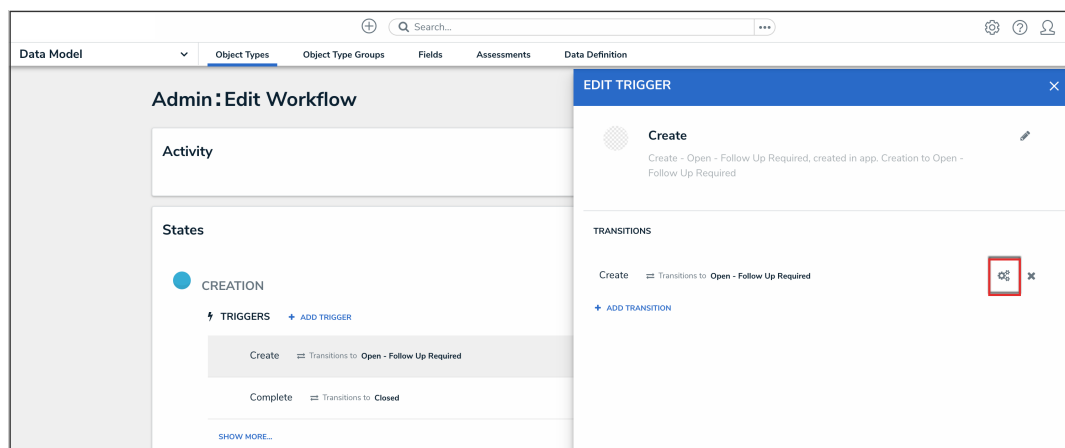
Add a Messaging Action to a Transition

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



Workflow Trigger

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



Configure Icon

- Click the **Add Action** button under **Actions**.

The screenshot shows the 'Admin: Edit Workflow' page with the 'EDIT TRIGGER' modal open. The modal has sections for Name, Destination State, Conditions, and Actions. In the 'ACTIONS' section, the '+ ADD ACTION' button is highlighted with a red rectangle.

Add Action Button

- Select **Messaging** from the **Type** dropdown menu.

The screenshot shows the 'Admin: Edit Workflow' page with the 'EDIT TRIGGER' modal open. In the 'ACTIONS' section, the 'Type' dropdown menu is open, and 'Messaging' is selected, highlighted with a red rectangle.

Type Dropdown

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

The screenshot shows the 'Admin: Edit Workflow' page with the 'EDIT TRIGGER' modal open. In the 'ACTIONS' section, the 'Name' field is highlighted with a red rectangle.

Name Field

6. Select **Email** from the **Message Types** dropdown menu.

The screenshot shows the 'EDIT TRIGGER' dialog box. The 'Message Types' dropdown is highlighted with a red box, and 'Email' is selected. The dialog includes the following fields:

- Type: Messaging
- Name: (empty)
- Message Types: Email (selected)
- Email Template: Select email template
- Form Template: Select the form to show when the user clicks on an email link
- Delivery Frequency: Immediate

Buttons at the bottom: CANCEL, CREATE.

Message Types Dropdown

7. Select the roles that should receive the email from the **Roles** dropdown menu.

The screenshot shows the 'EDIT TRIGGER' dialog box. The 'Roles' dropdown is highlighted with a red box, and a list of roles is displayed:

- Activity Owner
- Command Center Portal
- Location Manager
- Incident Triage
- Command Center Supervisor
- Command Center Administrator
- Administrator
- Dispatch User

Roles Dropdown

8. Select a **default** or **custom** template from the **Email Template** dropdown menu.

The screenshot shows the 'EDIT TRIGGER' dialog box. The 'Email Template' dropdown is highlighted with a red box, and a list of templates is displayed:

- Assigned - Old
- BCP - BCP Plan Review
- CM - 1 - Start Compliance Assessment
- CM - 2d - Assign Requirement Owner (Nightly)

Email Template Dropdown

The default templates (which may have been renamed or edited) include:

- **Standard:** Advises the user the one or more objects can be accessed.
- **Assigned:** Advises the user that one or more objects have been assigned to them.

9. Select the configurable form from the **Form Template** dropdown menu. This is the form that will be displayed when the user clicks on an object link in the email.

The screenshot shows the 'Admin:Edit Workflow' interface. On the right, the 'EDIT TRIGGER' panel is open. The 'Form Template' dropdown menu is expanded, showing a list of options: 'Select the form to show when the user clicks on an email link', 'Activity - CC - Create', 'Activity - CC - Create - Log', 'Activity - CC - Detailed Repeatable Form', 'Activity - CC - Details Navigation', 'Activity - CC - Edit', 'Activity - CC - Officer Portal - Requires Review', 'Activity - CC - Portal - Create', and 'Activity - CC - Read Only'. The 'Form Template' dropdown is highlighted with a red box.

Form Template Dropdown

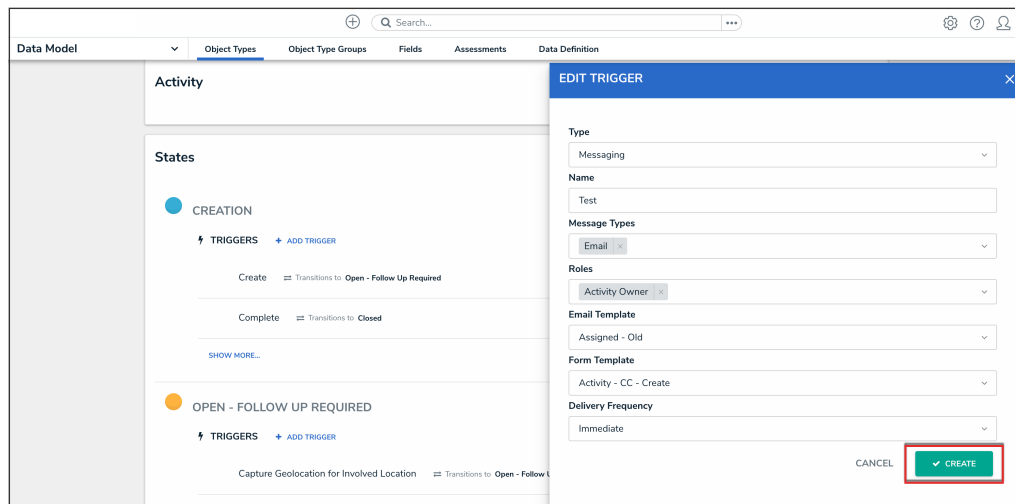
10. Select one of the following options from the **Delivery Frequency** dropdown menu:

- **Immediate:** Sends an email to the users in the role(s) immediately following an object's transition. This is the default frequency.
- **Nightly:** Sends an email to the users in the role(s) at the [appropriate time for your organization's environment](#). If additional actions with a nightly frequency have been added to other object types or workflows using the same role and email template, the user will receive a single email digest for multiple object types.

The screenshot shows the 'Admin:Edit Workflow' interface. On the right, the 'EDIT TRIGGER' panel is open. The 'Delivery Frequency' dropdown menu is expanded, showing a list of options: 'Immediate', 'Immediate', and 'Nightly'. The 'Delivery Frequency' dropdown is highlighted with a red box.

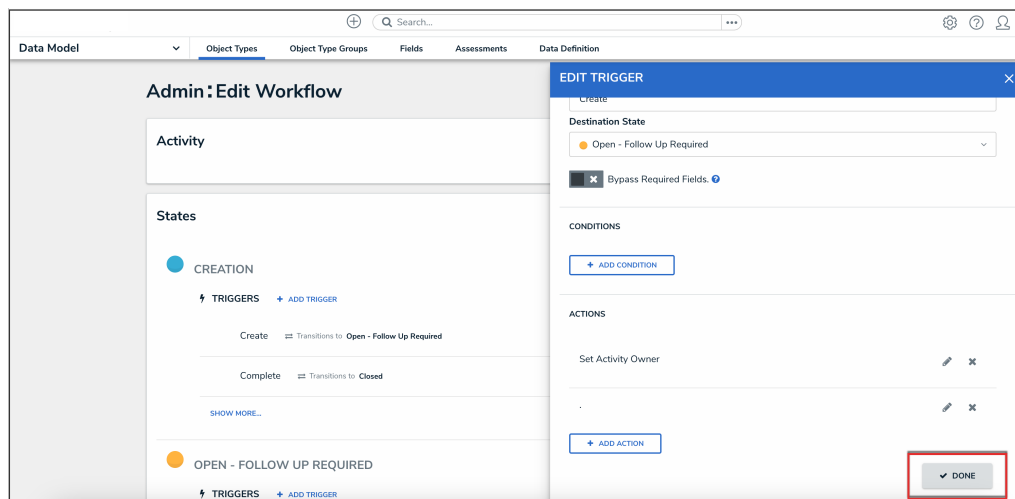
Delivery Frequency Dropdown

11. Click the **Create** button.



Create Button

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



Done Button