

Add a Set Field Value Action to a Transition

Last Modified on 09/17/2024 10:05 am EDT

Overview

The **Set Field Value** action auto-completes one of the following fields saved to the object type:

- A [Date & Time](#) field based on the date the object transitioned to the next state. For example, this action could be used to add a date to the Completed Date field once the object moves from the In Progress state to the Complete state. Administrators can choose to 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.



Note:

The date and time captured in this action is in UTC time.

- A [Select List](#) field, including multi-select lists, which auto-fills a pre-defined option or options. For example, this action could be used to select a High Priority option when an Incident object moves from the Open to Escalated state.

User Account Requirements

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

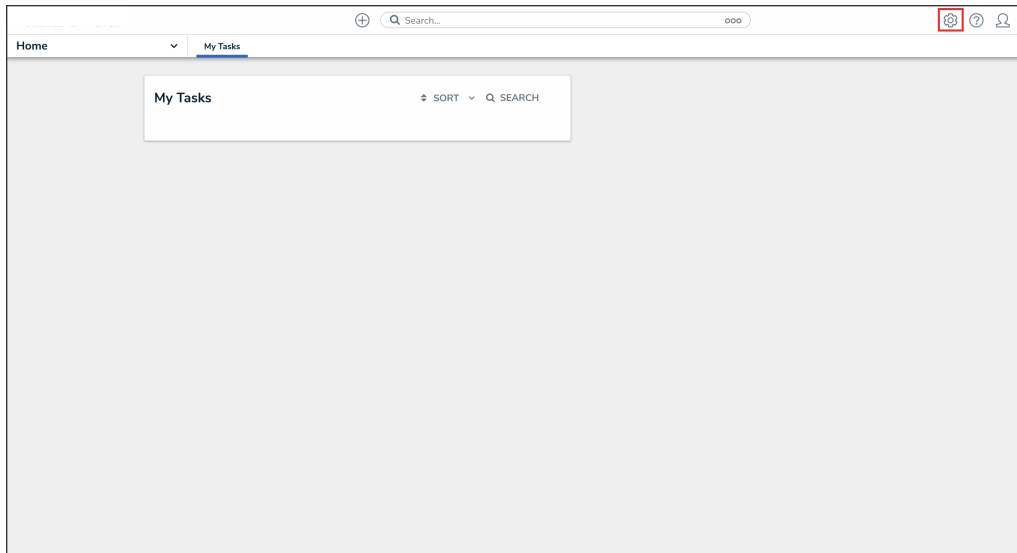
Required Information/Setup

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.

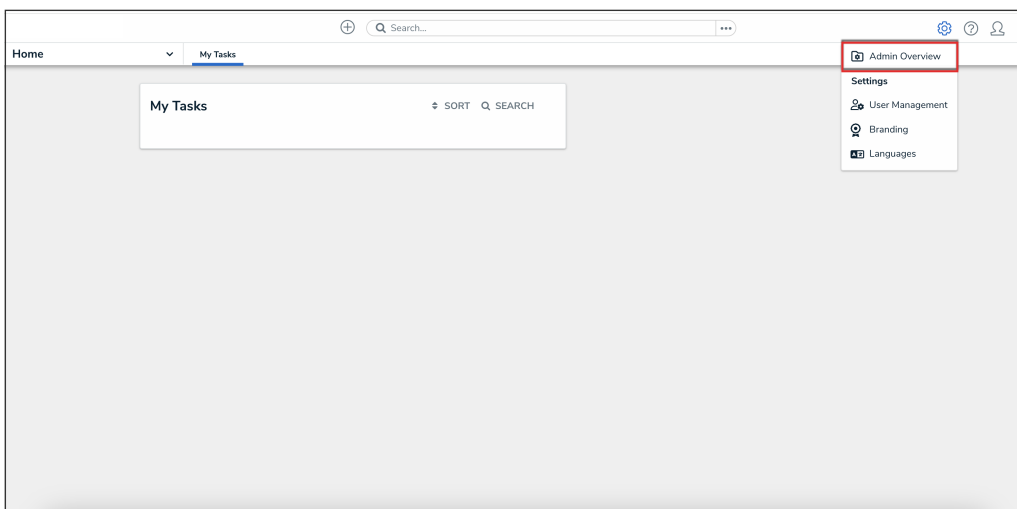
Navigation

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



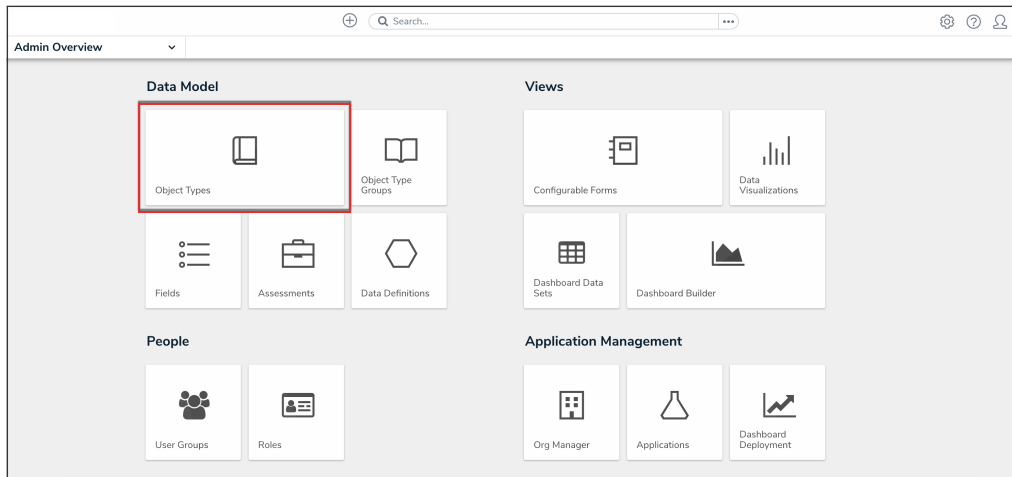
Administration Icon

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



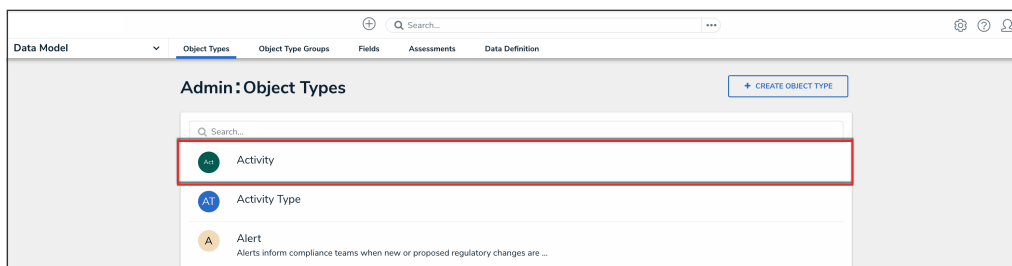
Administrator Settings Menu

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



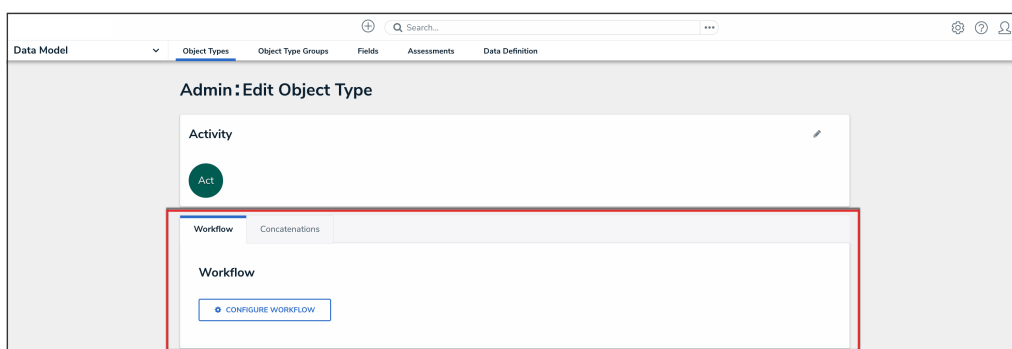
Object Types Tile

4. 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.



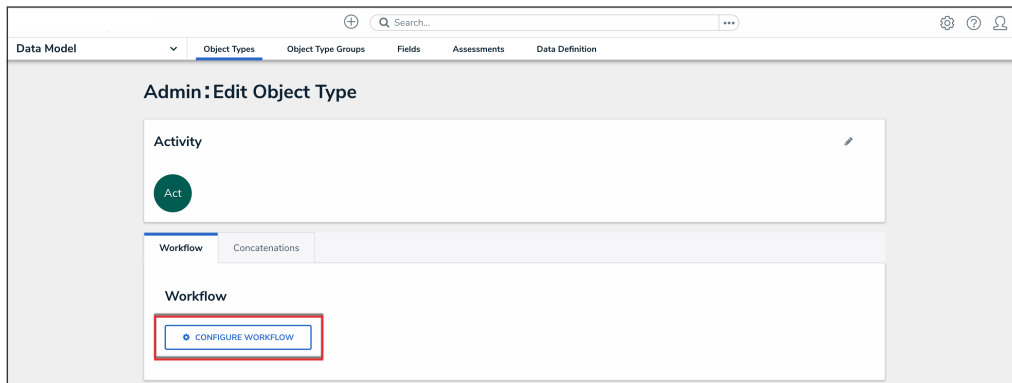
Object Type Name

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



Workflow Tab

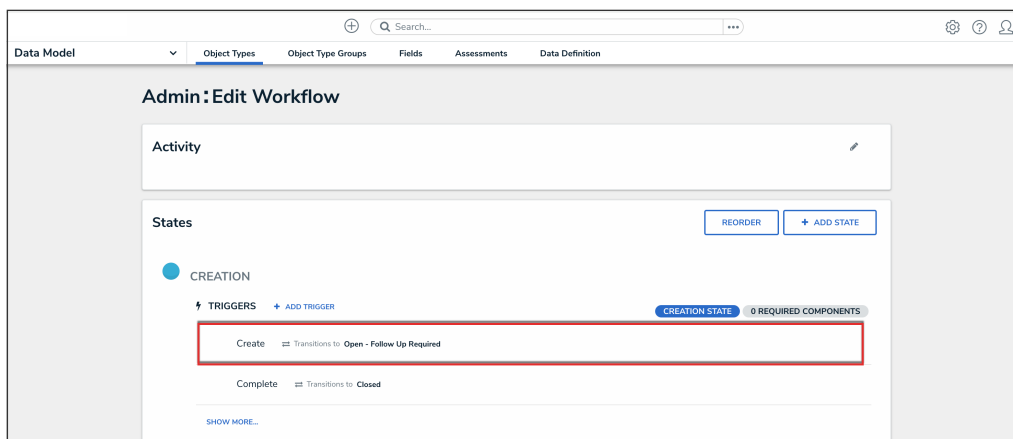
7. If there are no workflows listed, click the **Configure Workflow** button.



Configure Workflow Button

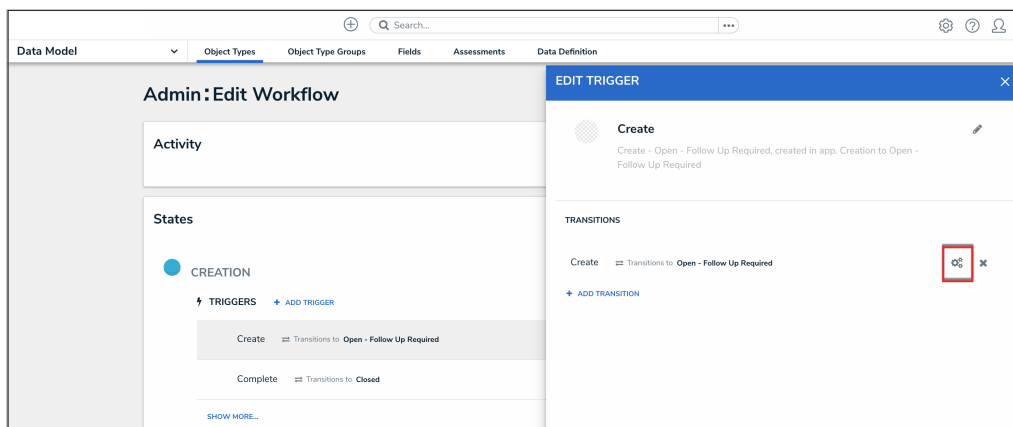
Add a Set Field Value Action to a Transition

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



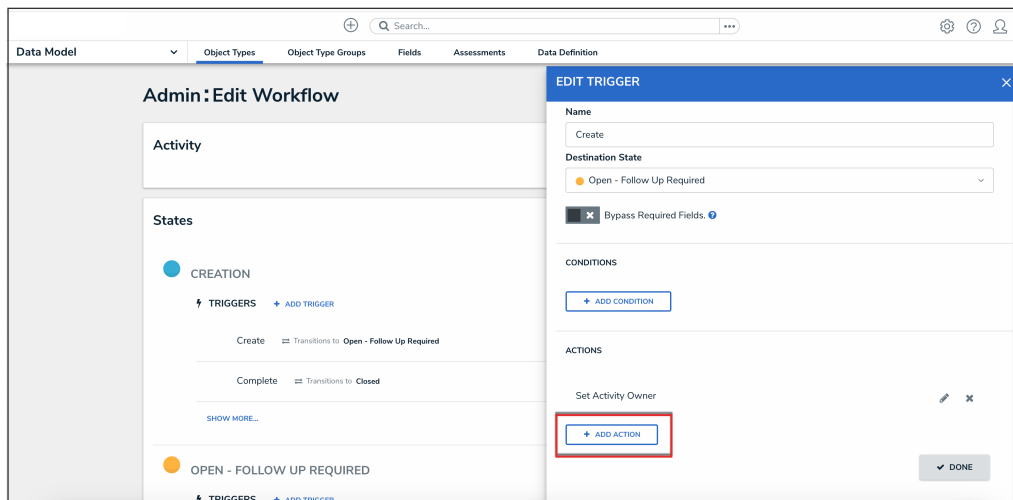
Workflow Trigger

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



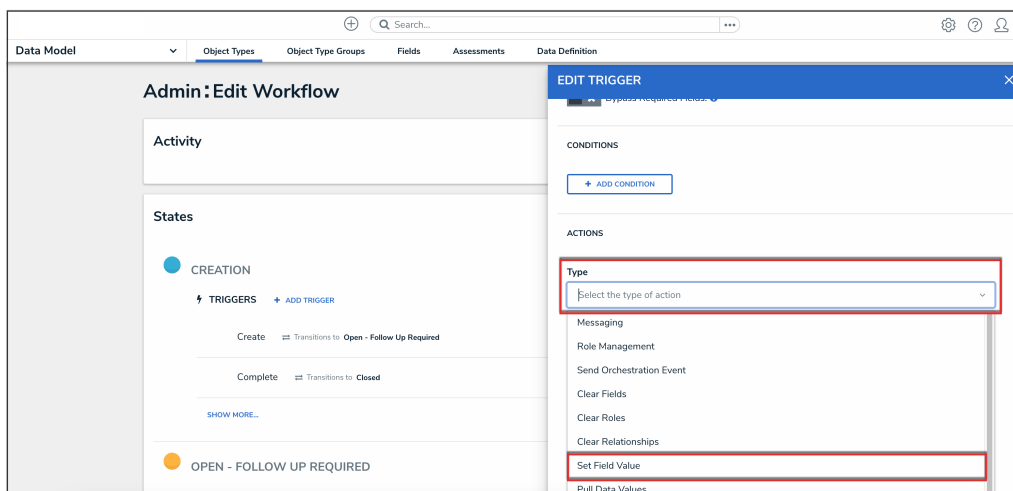
Configure Icon

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



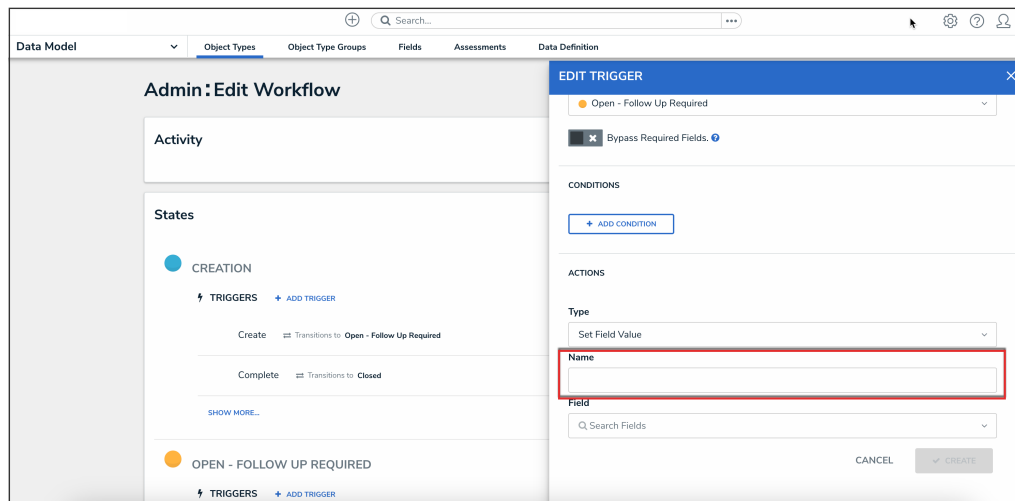
Add Action Button

- Select **Set Field Value** from the **Type** dropdown menu.



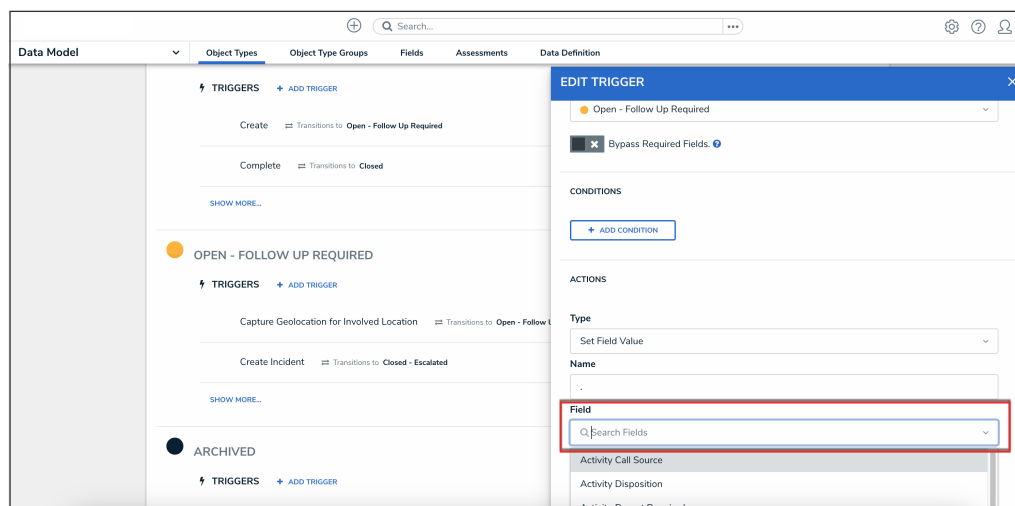
Type Dropdown

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



Name Field

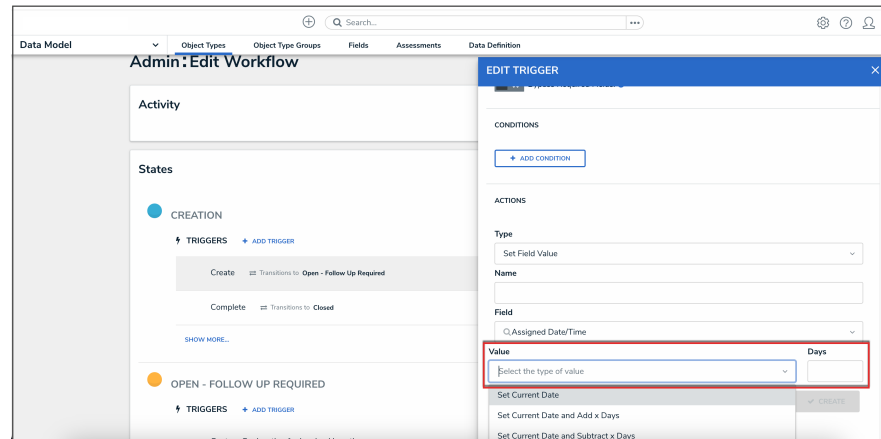
6. Select a **Date & Time** or **Select List** field added to the object type from the **Field** dropdown menu.



Field Dropdown

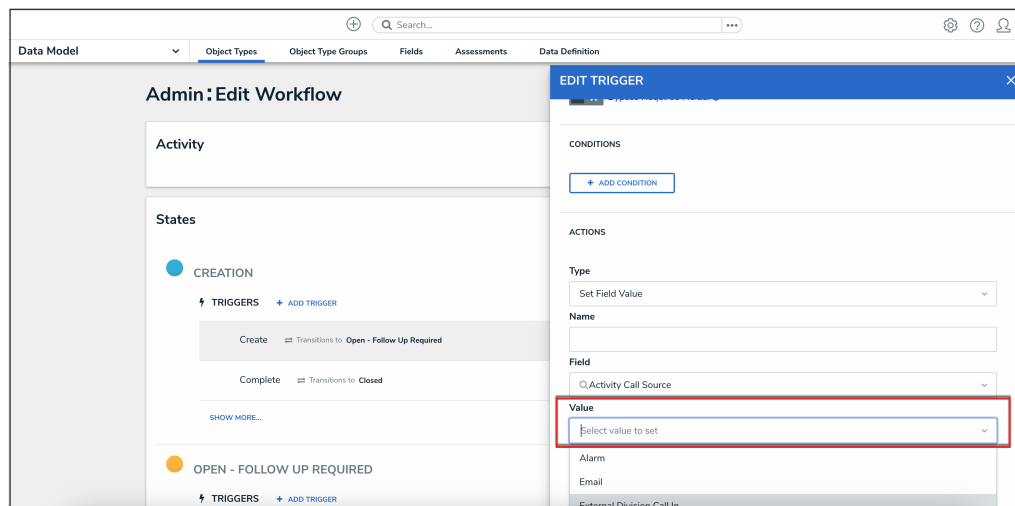
7. If field is a date and time field, select one of the following options from the **Value** dropdown menu:

- **Set Current Date:** Adds the date the object transitioned.
- **Set Current Date and Add x Days:** Adds the current date the object transitioned, plus an additional number of days. If you select this option, enter the number of days to add in the Days field.
- **Set Current Date and Subtract x Days:** Adds the current date the object transitioned, but subtracts a selected number of days. If you select this option, enter the number of days to subtract from the current date in the **Days** field.



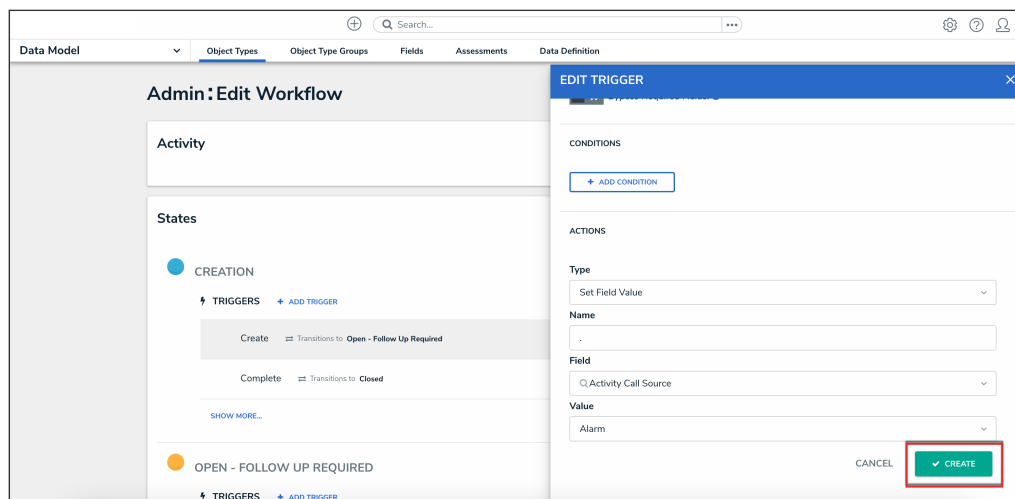
Value Dropdown

8. If the field is a select list, choose an option from the **Value** dropdown menu. If the field is a multi-select list, you can select multiple options.



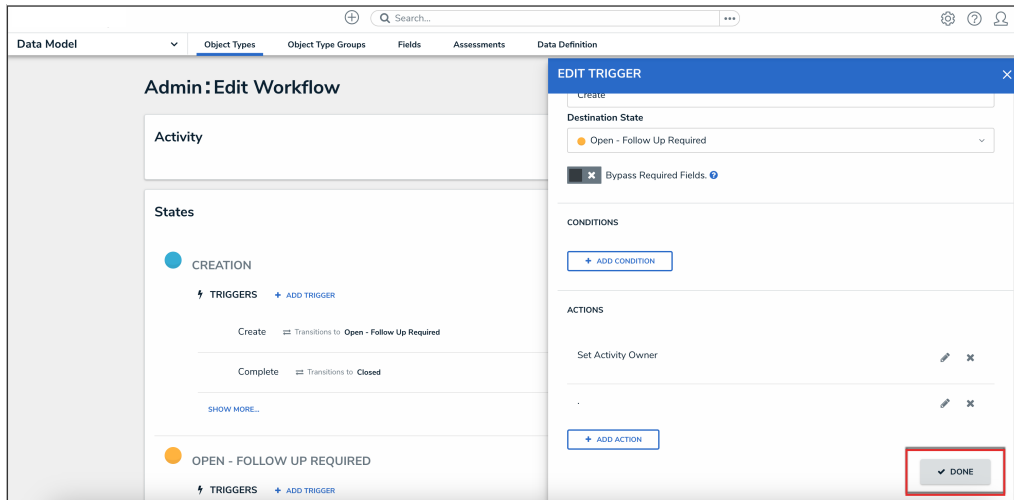
Value Dropdown

9. Click the **Create** button.



Create Button

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



Done Button