Scheduled Record Creation

Records can be automatically created on a regular time frequency. Scheduled Record Creation is useful in the Inspections module as Inspections can be scheduled for a specified time frequency.

Any module can utilise the Scheduled Record Creation functionality although in practical terms it is usually limited to Inspections and Actions if used for tasks.

The setup of the schedule is completed in steps:

- Create a Draft record in the module.
- Review the Hierarchy settings in the Form Editor.
- Create the Schedule.

The following steps detail all steps required to create a Schedule. Please note that any required notifications would need to be reviewed separately in Record Notifications.

Create a Draft Record

The first step is to create a Draft record. The Draft record remains is only visible to the author of the record. The Draft record is used in the Schedule Creation Editor.

1. Go to the module that you are wanting to create a schedule for. In the case of Inspections select the required Inspection form from the menu.

2. Select **New Record**.

3. Decide on which fields will always need to be populated with the same information and complete accordingly.

   - Note that the person(s) for who the schedule is to be created for is added in the Schedule Editor in later steps.
   - Add information to the record if needed e.g. Description or if there is a group of people to always be referenced in the record that is scheduled. A different field would then be used when creating the schedule. A field can be used if you want to reference a group of people for example reference people who are involved in the Inspection but not to create a record for each person.
   - Information is added to the Draft record and will always be created in every occurrence of the schedule.

4. Select **Save**.

Once the above steps 1-4 have been completed it is recommended that the Hierarchy is reviewed in the Form Editor. The review to the Hierarchy ensures that the correct hierarchy values are entered into the scheduled record each time. Follow the steps on the next page to complete this.
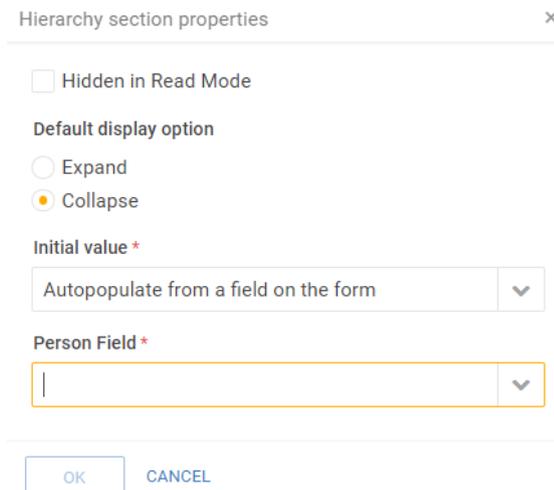
Hierarchy Review

By default forms are set to display the Hierarchy values based upon the user creating the record. In the instance of an Inspection it should be changed to populate the hierarchy based upon the name of a person in the Inspection e.g. Assignee or Accountable.

Before creating the schedule check the Hierarchy settings for the Inspection that is to be scheduled following the steps below.

1. Select **Form/Workflow Definition** from the Administration menu.

2. Select the module from the menu e.g. Inspections.

3. Double click to open the form that the schedule is being designed for.

4. Select the **Edit** button on the Hierarchy section header.

5. Select **Auto populate from a field on the form** in the Initial value field.

6. Select the required field to have the hierarchy populated from e.g. Assignee.

7. Select **OK**.

Now that the Hierarchy has been reviewed and the Draft record is created the final step of creating the schedule can be completed.
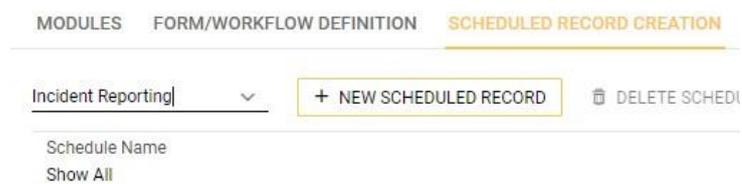
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Scheduled Record Editor

Once the Draft record has been created and the Hierarchy has been reviewed and changed as necessary the schedule can be created.

Using the Schedule Editor the record to base the schedule on is selected. The names of the people for who a scheduled record is to be created for is defined. Finally, the frequency in which the schedule is to be run is set.

Follow the steps below to complete the schedule creation. Note that the Draft record and Hierarchy should be completed first.

1. Select **Scheduled Record Creation** from the Administration menu.

2. Select the module you are creating the **Scheduled Record** for from the menu.

3. Select **New Scheduled Record** and complete the Scheduled Record Editor as below.

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Details

4. Enter a name for the schedule in the **Schedule Name** field.

5. In the **Template Record** field choose the **Select** button to add the Draft version of the Inspection form that is to be scheduled.
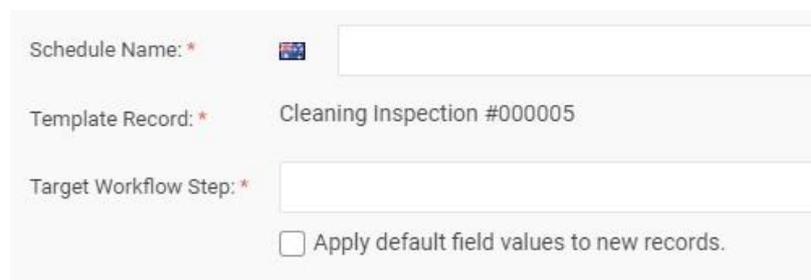

6. Select the **Draft record** of the Inspection that is to be scheduled from the list. Select the **Select** button.

7. The Template Record field will now show the record that will be used as a template to create the scheduled record. Note that the record is in Draft and is only visible to the Author in the module.

8. In the **Target Workflow Step** field select the workflow step the record should be created in. Typically, the selection selected should be **Open**. Selecting Open will mean that when the scheduled record is created it will create the record in the status selected e.g. Open. Note associated notifications should be reviewed.

9. Tick the checkbox if default field values are to be applied to the scheduled record. This is recommended for date fields as it will apply the date the record is created automatically.

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User Assignment

10. Select the field that the names of who the schedule is for will be populated into e.g. Assignee or Accountable. The selected field will be the one that has the names displayed.

11. In the **Users** field select the names for the scheduled record. Note that all names selected will mean that an individual record is created.

12. It is optional to use the **Roles** menu in User Assignment. This is used if you are wanting to create a schedule based upon the Occupation a person has. If you choose an Occupation the scheduled record will be created for all people that have the same Occupation in the User record.
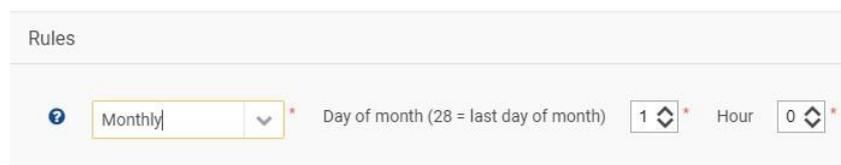
Rules

13. Select **Add Schedule Rule** at the bottom of the form window.

| SAVE | ADD SCHEDULE RULE | ADD FIELD RULE | CANCEL |

Select the frequency required from the drop-down menu. Note the time is set to 24hour.
Multiple time frequency options can be added as applicable.

- **Daily** will require to enter the time to create the record in the system.

- **Weekly** will require to select the day of the week and time to create the record in the system. All subsequent schedules will be created on a weekly basis.

- **Monthly** will require to select the day in the month and time to create the first record All subsequent schedules will then be created on a monthly basis.

- **Yearly** will require to select the month, date in the month and time that the first schedule is to be created. All subsequent schedules will then be created on a yearly basis.

- **Quarterly** will require to select the month and date that the first schedule is to be created. All subsequent schedules will then be created on a quarterly basis.

Rules

Monthly   *   Day of month (28 = last day of month)   1   *   Hour   0   *

14. Select **Save**.

Once all of the listed steps have been completed, the scheduled record(s) will be created in the relevant module when the scheduling rule(s) is met. The Draft record that was used to create the schedule will display in the module with a recurrence symbol along-side the Draft status pencil icon. The symbol indicates that the record is part of a recurrence rule.

It is advisable to check notifications are set in line with the schedule and that any schedules that are created will align with the notifications in the module. Review in Record Notification for this to be verified.   .

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