

*** Must have workflow as it involves more than 1 step

CASE: We want to have a dynamic drop down list that based on HR Category that will present the 2nd list of document types or if the HR Category does not have a list simple file.

Step 1:

1. Create the personal TASK you need (Employee Name, DOH, SSN etc...)
2. Create a LIST of Employee Categories (Personnel, Medical, Benefits, I9, WC, etc..)
3. Create a LIST of Document Types for each category that has a list
 - a. Personnel would have (Job Description, Policy Ack, Discipline Action, Term Letter, etc...)
4. Add a separate TASK for all Employee Categories Create a COMPARE VERIFY for each of the categories in the list (Personnel, Medical, Benefits, I9, WC, etc..)

Action Editor: Filing

Task Library

- Type Verify
- User Approval
- User Prompt
- User Verify Field Group
- User Verification
- Verify Content Type
- Verify Field Group
- Verify Inbox
- Verify Group
- Verify Security Class

Action Name:

Sticky Fields: ☐

Add To Library

Tasks

- User Prompt * Enter Employee Name -> \$Title
- User Prompt: Enter Date of hire -> \$Keywords
- Combo Box: * Select Personnel Category -> \$Field.Cat...
- Compare Verify: \$Field.Category, "Personnel" -> IsPe...
- Compare Verify: \$Field.Category, "Benefits" -> IsBen...
- Compare Verify: \$Field.Category, "payroll" -> IsPayroll
- Compare Verify: \$Field.Category, "Emergency Contact"...

Add Edit Delete

OK Cancel

COMPARE VERIFY Task: notice the output

Task Editor: Compare Verify: \$Field.Category, "Personnel" -> IsPe...

Arguments Library

- \$AccessedOn
- \$ApprovalCount
- \$ApprovalsRequired
- \$AssignedOn
- \$Assignee
- \$ContentType
- \$CreatedOn
- \$CurrentUser
- \$CutoffDate

Task:

Input

- \$Field.Category
- "Personnel"

Output

- IsPersonnel Remove

Failure Message

Invert ☐

Field Type

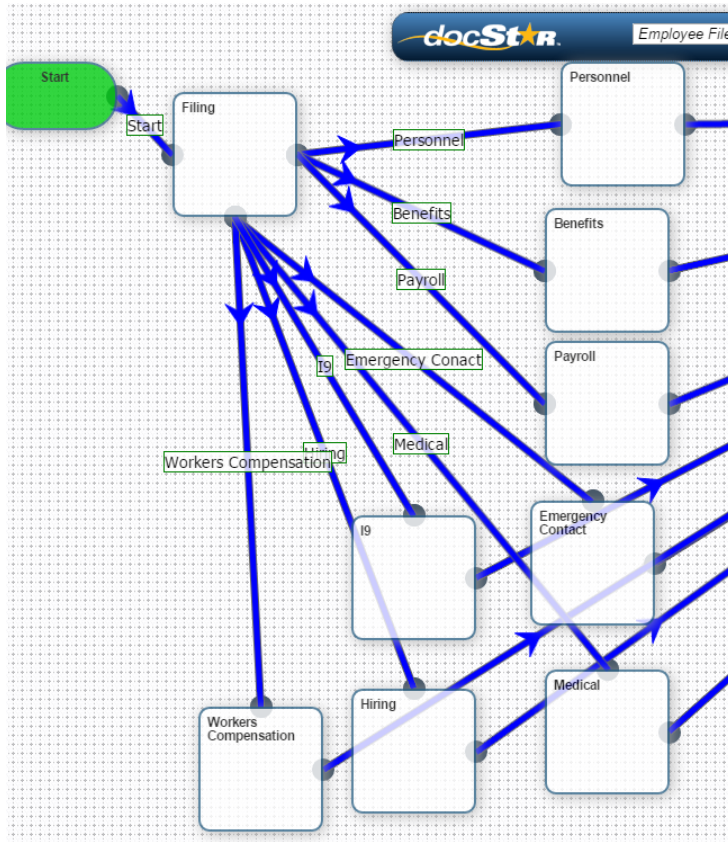
Comparison

Task Info

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Step 2

1. Create a STEP for each Category



Step 2 Configuration:

1. Create a TASK that is a COMBO BOX with the document types and which field to output
 - a. Do this TASK for each of the STEPS that have LISTS
2. BRANCH tab choose END

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Step 2 Configuration continued:

Step Editor: Personnel

Step Name:

Assignee Mode:

Branch Mode:

Actions **Branches**

Branch Conditions

-
-
-
-
-
-

Branches

Label: Description:

Condition: Next Step:

Line Type:

STEP 3:

1. Go back to Step 1 and add a BRANCH for each Category that you created in step 2
2. Notice the CONDITION and NEXT step

Step Editor: Filing

Step Name:

Assignee Mode:

Branch Mode:

Actions **Branches**

Branch Conditions

-
-
-
-
-
-
-
-

Branches

Label: Description:

Condition: Next Step:

Line Type:

Label: Description:

Condition: Next Step:

Line Type:

Label: Description:

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***For the Categories (STEPS) that don't have a dropdown list**

Do a REPLACE task an END branch

Action Editor: Replace ✕

Task Library

- Type Verify
- User Approval
- User Prompt
- User Verify Field Group
- User Verification
- Verify Content Type

Action Name: Add To Library

Sticky Fields: ☐

Tasks

- Replace: "Payroll" -> \$Field.Document Type

Add Edit Delete

Task Editor: Replace: "Payroll" -> \$Field.Document Type ✕

Arguments Library

- \$AccessedOn
- \$ApprovalCount
- \$ApprovalsRequired
- \$AssignedOn

Task: Replace

Input:

Output:

Task Info

Step Editor: Payroll

Step Name:

Assignee Mode:

Branch Mode:

Actions **Branches**

Branch Conditions

- \$ApprovalCount
- \$ApprovalsRequired
- \$Field.GL_Amount
- \$IsApproved
- \$IsDenied

Branches

Label: Description:

Condition: Next Step:

Line Type:

Add Delete

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Workflow:

Step 1 is presented:

1. After you complete Step 1 hit submit

Workflow

Workflow: Employee File Dynamic List
Current Step: Filing
Current Action: Filing
Assignee: admin@docstar.com

Enter Employee Name

Enter Date of hire

Select Employee Category

Step 2:

Document list based on employee category selected will be displayed.

Workflow

Workflow: Employee File Dynamic List
Current Step: Personnel
Current Action: List
Assignee: admin@docstar.com

Select Personnel Document Type

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END RESULTS:

Dynamic List: Note that the Category is Personnel but the document type is Job Description

▼ Properties		
▲ Content Fields		
Category	Personnel	X
Document Type	Job Description	X
Employee Name ▼	Belanger Chuck	X
DOH ▼	4/17/2015	X
SSN_4 ▼	1234	X
<div>Add Field</div>		

Categories without Dynamic list:

▼ Properties		
▲ Content Fields		
Category	Personnel	X
Document Type	Personnel	X
Employee Name ▼	Belanger Chuck	X
DOH ▼	4/17/2015	X
SSN_4 ▼	1234	X
<div>Add Field</div>		

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