

Configure a task reminder in a control

This feature allows you to set up a task reminder in a control. To do this, you need to have the superuser role.

Note: You can configure two types of reminders:

- **Reminder to users with pending tasks:** this reminder is sent to users assigned to the task.
- **Extract list of users with pending tasks:** this reminder gives the list of users who must submit a task assigned to them

Set reminders for users with pending tasks

STEP 1

To set a reminder for users who have pending tasks to complete, go to the platform menu **Configurations** → **Controls** and search for the control you wish to configure the reminder.

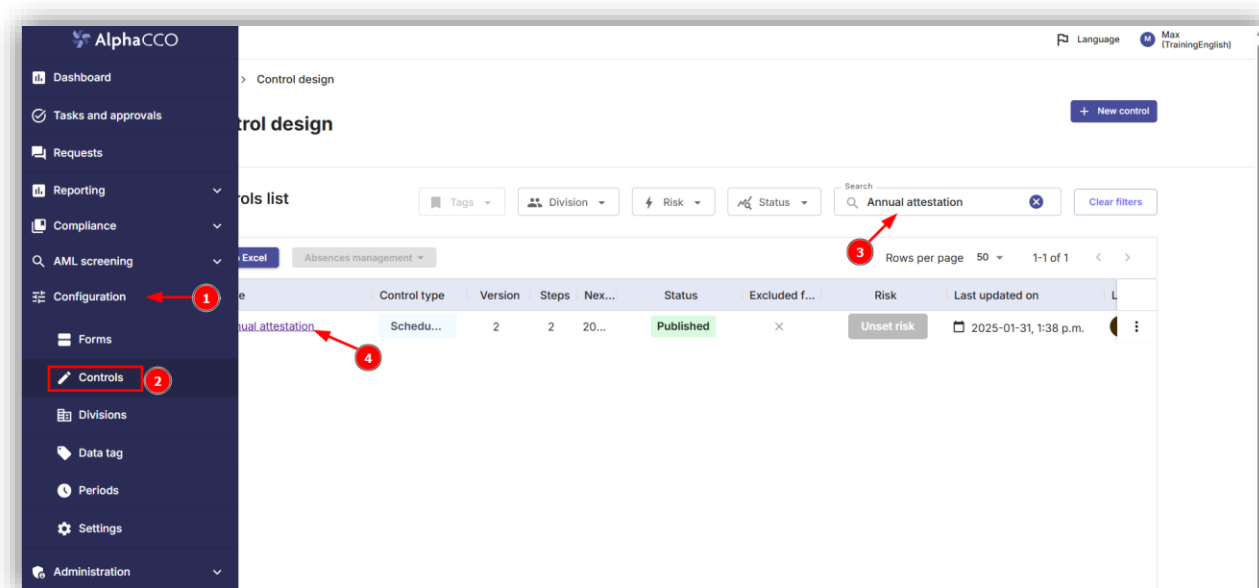


Figure 1: Control list page

STEP 2

Go to the form assignment step and click on the **Manage reminders** icon.

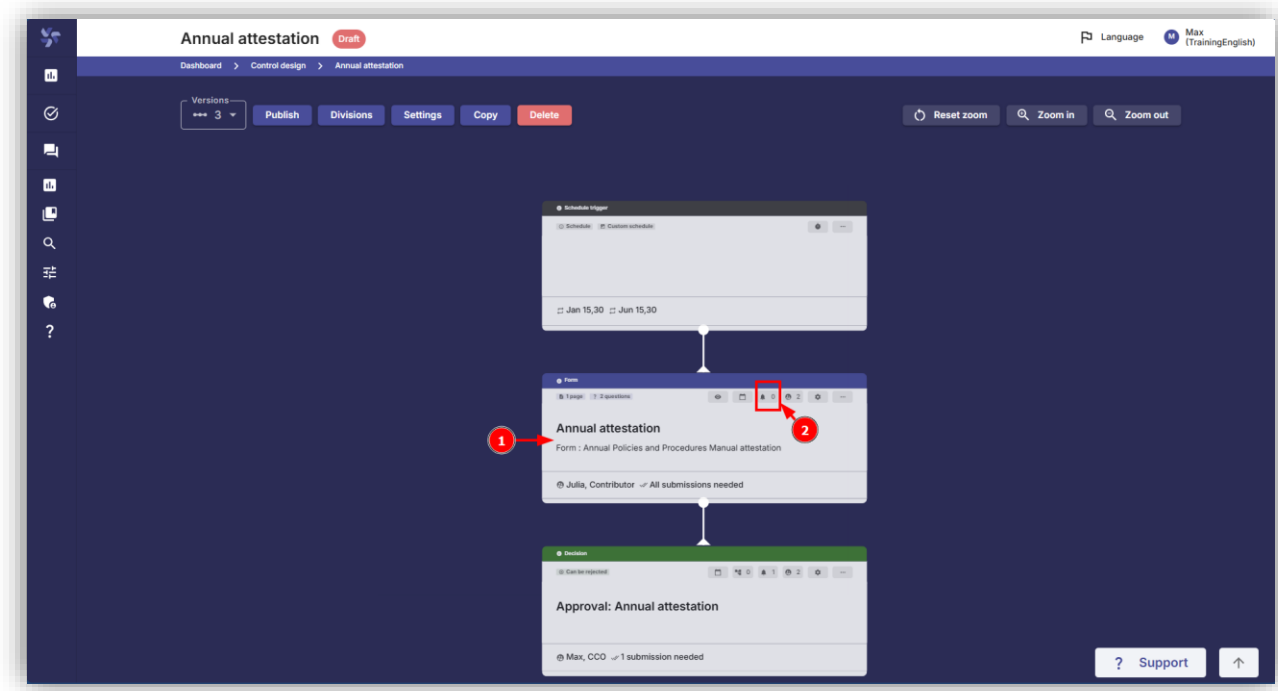


Figure 2: Form assignment step page

STEP 3

Click on **Add a reminder**

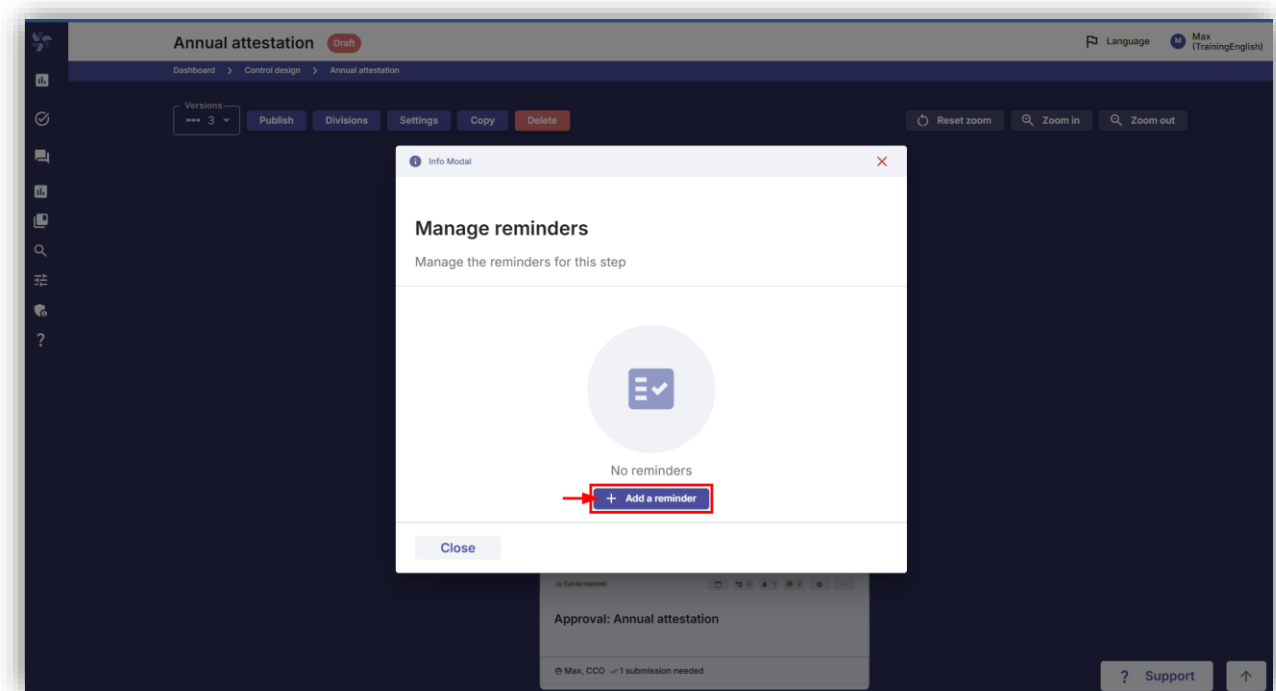


Figure 3: reminder creation window

Select **Reminder to users with pending tasks**, then choose one of the following options:

- **Before the due date:** the reminder is sent according to the number of days defined before the due date.
- **After the due date:** the reminder is sent according to the number of days defined after the due date.
- **On due date:** the reminder is sent on the due date.

Click **Save** to complete the configuration.

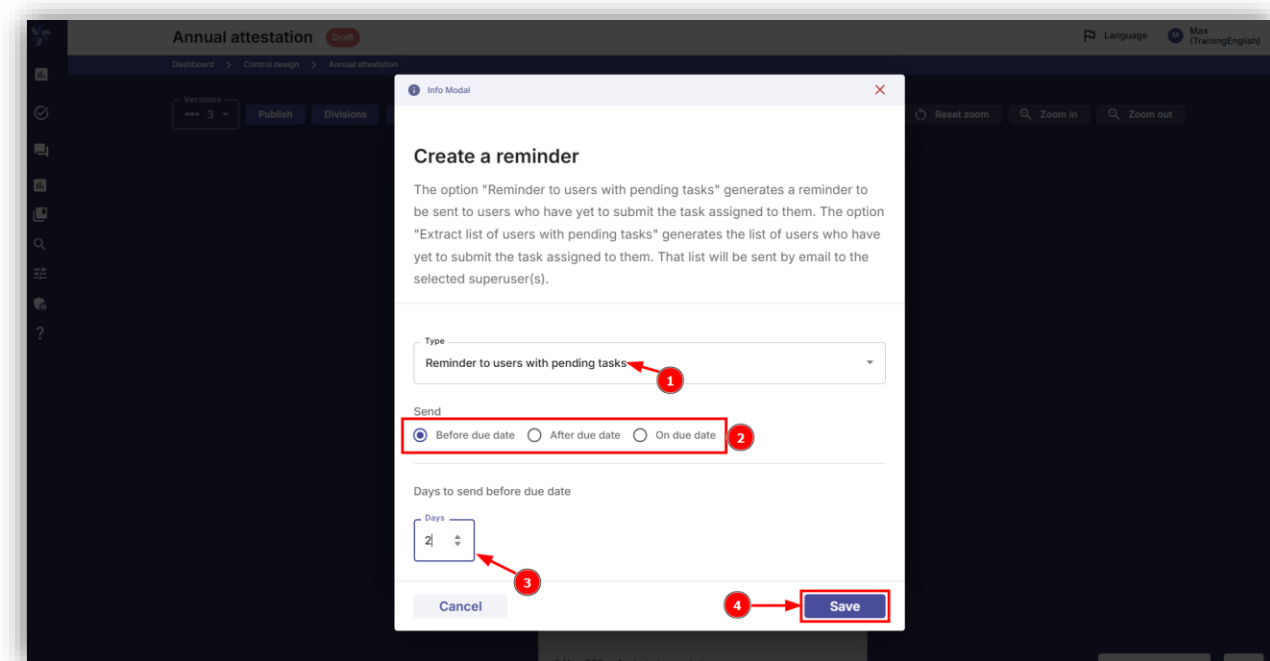


Figure 4: Task reminder configuration options window

STEP 4

Check the reminders configured in the previous step.

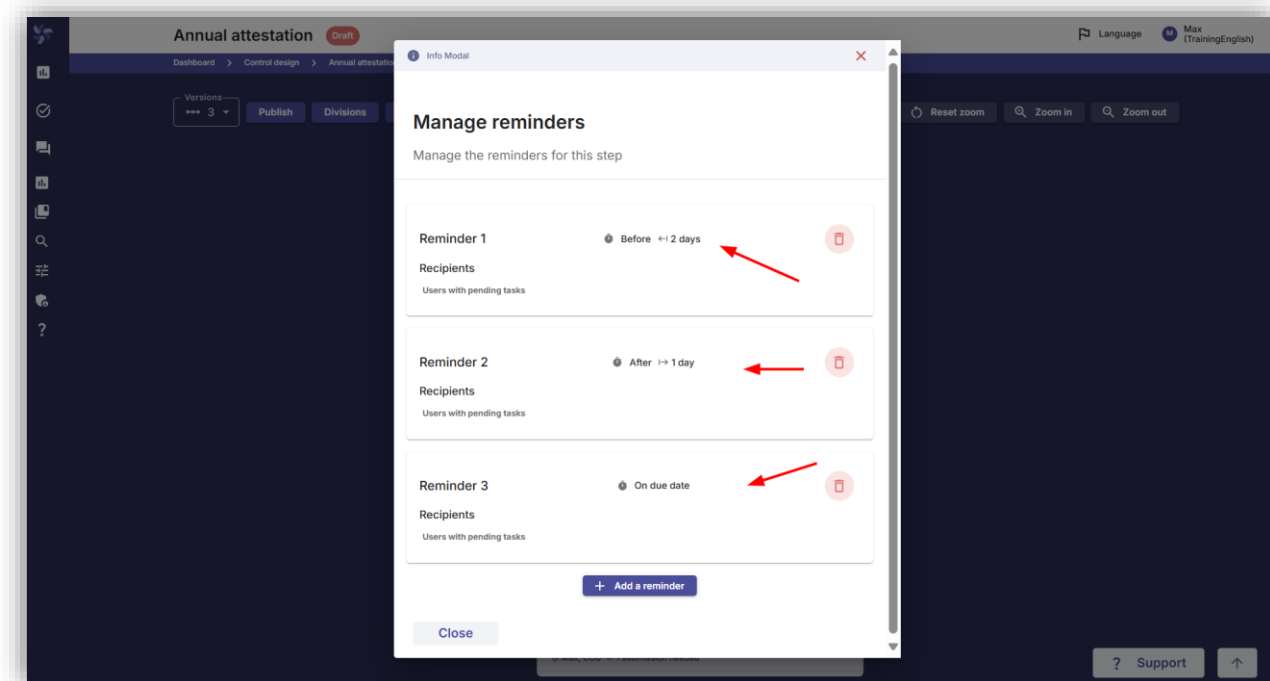


Figure 5: Task reminder window with different configurations

Set up a reminder with a list of users who have pending tasks

STEP 1

Repeat steps 1 to 3 and select **Extract list of users with pending tasks**, then select user and/or user groups. Finally, configure the reminder according to your needs:

- **Before the due date:** the reminder is sent according to the number of days defined before the due date.
- **After the due date:** the reminder is sent according to the number of days defined after the due date.
- **On due date:** the reminder is sent on the due date.

Click on **Save** to complete the configuration.

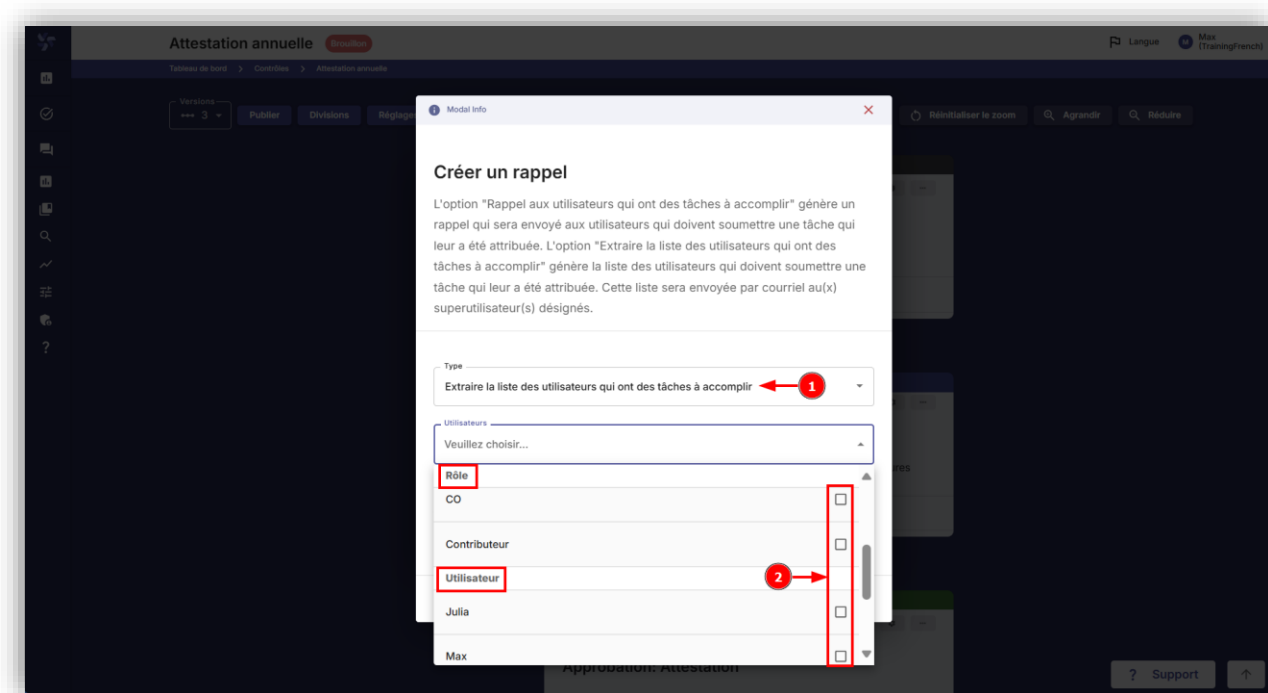


Figure 1: Reminder configuration options window for the list of users with pending tasks.

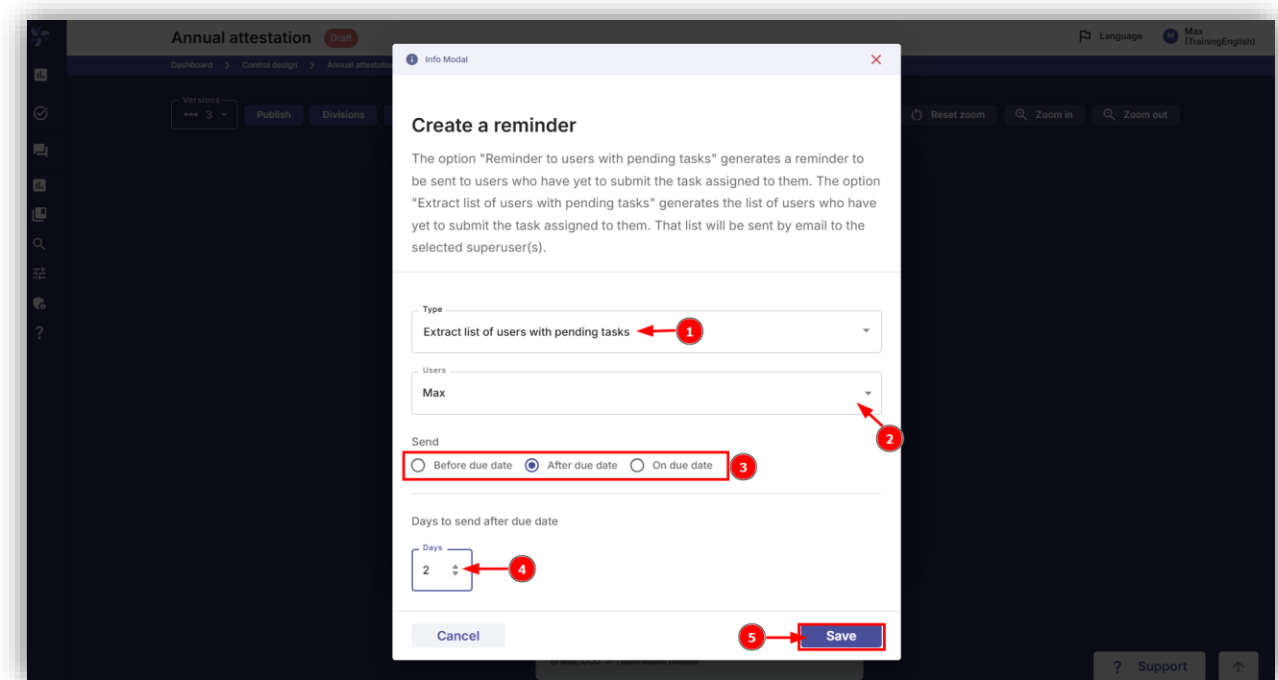


Figure 2: Reminder configuration window for the list of users with pending tasks.

STEP 2

Check the reminders configured in the previous step. A reminder e-mail is sent to the user and/or groups on the due date, depending on the configuration chosen.

In this example, a reminder will be sent to user Max two days after the due date, with the list of users with a task to complete.

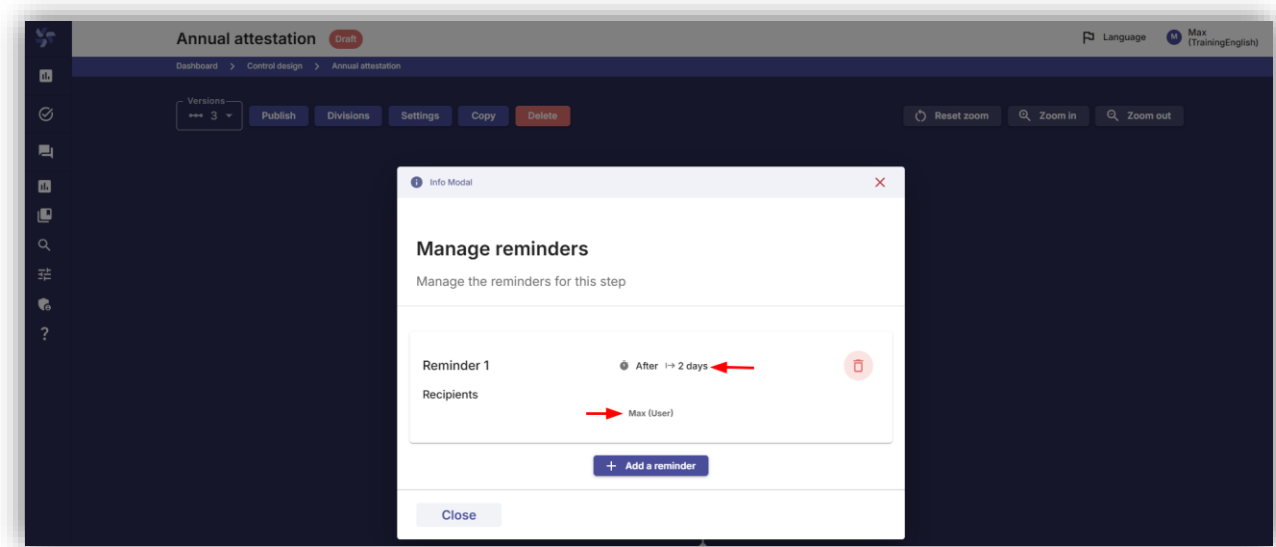


Figure 3: Configuration window with configured reminder of users with pending tasks.

NOTES

Please note that this document is only a brief guide. The AlphaCCO support team will be happy to assist you if you require further guidance. Please do not hesitate to contact us at support@alphacco.com