

Onboarding - Logging an Employee Message in Beyond via Automations

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Overview

Automations run actions, like sending emails or creating tasks, when specific events happen.

Recruiters log messages on employee records all day. A note about availability, a t-shirt size, a reason someone was passed over for the assignment. If that information is already coming in on a form, an automation can log the message for you the moment the candidate submits it.

The screenshot displays the Beyond Automations configuration interface. It consists of four main panels:

- Placement Events:** Contains fields for 'Automation Name', 'Email Notification', and 'Description'. The description states: 'This sends an email when a placement is created'. It also includes a 'Dependencies' section with a 'Status' dropdown and a 'Run on new placement creation' checkbox.
- condition_1:** A rule configuration panel. It shows a condition: 'Name does not contain "Candidate" (case sensitive)'. Below this, it notes: 'This branch runs when Name does not contain "Candidate" (case sensitive)'.
- action_2:** An action configuration panel titled 'Create Onboarding Link'. It includes fields for 'Onboarding Link Type', 'Placement', 'Assignee Type', 'Employee', 'Locale', and 'Auto'. There is also a 'Redirect To' field and a section for 'Optional URLs to redirect the user to upon completion'.
- action_1:** An action configuration panel titled 'Send Email'. It includes fields for 'Email service', 'Onboarded Email Service', 'Email template', 'Theme', 'Send email to', and 'Email subject'. The email body is configured with a paragraph: 'Hi {{ employee.first_name }} {{ employee.last_name }}. Please complete the forms in the onboarding link below. [Onboarding Link](#). Thank you. Your Onboarding Team'.

Note You will need to be a member of the "Admins" User Group to create and manage Automations.

For more information on permissions, please see the article titled [Onboarding - User Groups and Permissions](#).

Before You Begin

Before this type of automation can be created, you will need the following:

- An Onboarding Portal API token
 - For more information on how to create the API token, please see the article titled [Onboarding - How to Create an API Token](#).
- The message action code you want to file the message under within Beyond

Saving the Form Information to the Employee Record

The field path of the information within the form that you want logged as a message must be pointed at the employee record (**employee.field**) instead of the form (**form.field**).

For example, the field path of "**employee.custom_attributes.tshirt_size**" saves the answer onto the employee record, which allows it to be used within automations:

The screenshot displays a form editor interface. On the left, a sidebar lists various form sections. The 'T-Shirt Size' field is selected, and its configuration is shown in the main area. The 'Path' field is set to 'employee.custom_attributes.tshirt_size', which is highlighted with a red box. Other options include 'Type' (Text), 'Required' (toggle), 'Pattern', 'Min Length', 'Max Length', 'Sensitive Information', and 'Visibility'. The right sidebar shows the form's preview, including an 'Email Address' field, a 'T-Shirt Size' field, an 'Applicant Certification' section, and an 'Applicant Signature' field.

Note For more information, please see the article titled [Onboarding - Understanding Field Paths](#).

Deploy the updated form version and then copy that form's ID as this will be utilized in later steps:

Form Details

ID	form_01kzbjbsbjf6etaf1v dhs8n1n0
Source	Organization
Task Reuse Crite...	Employer and 1 more
Created at	2 months ago
Tags	General General Onboarding

Creating the Automation

Begin by navigating to the Onboarding Portal > Configurations > Automations > and select "New Automation" at the top right:

TW

Demo

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Within the "Create Automation" sidebar, enter a name and description for the Automation:

Name

T-Shirt Size Message Logging

Description

Logs a message of the employee's T-Shirt Size after completing their application.

Select the appropriate "Entity Type(s)", "Dependencies", and "Rerun Strategy" within the "Trigger Settings" section.

For this example, we will be selecting the following:

- **Entity Type:** Task
- **Dependencies:** Status
- **Run On New Placement Creation:** Unchecked
- **Rerun Strategy:** Allow reruns

Trigger Settings

Automations continuously monitor changes to certain properties of an entity. Those properties are called "dependencies". Changes to one or more dependencies will trigger this automation.

Entity Type ?

Task ▼

Dependencies ?

Status ⌵

☐ Run on new record creation

Rerun Strategy ?

Allow reruns ▼

Once all of the information has been entered, select "Create":

Create Automation



Describe the automation in plain language. The AI will draft the blocks.

 Draft with AI

Name

T-Shirt Size Message Logging

Description

Logs a message of the employee's T-Shirt Size after completing their application.

Trigger Settings

Automations continuously monitor changes to certain properties of an entity. Those properties are called "dependencies". Changes to one or more dependencies will trigger this automation.

Entity Type

Task

Dependencies

Status

☐ Run on new record creation

Rerun Strategy

Allow reruns

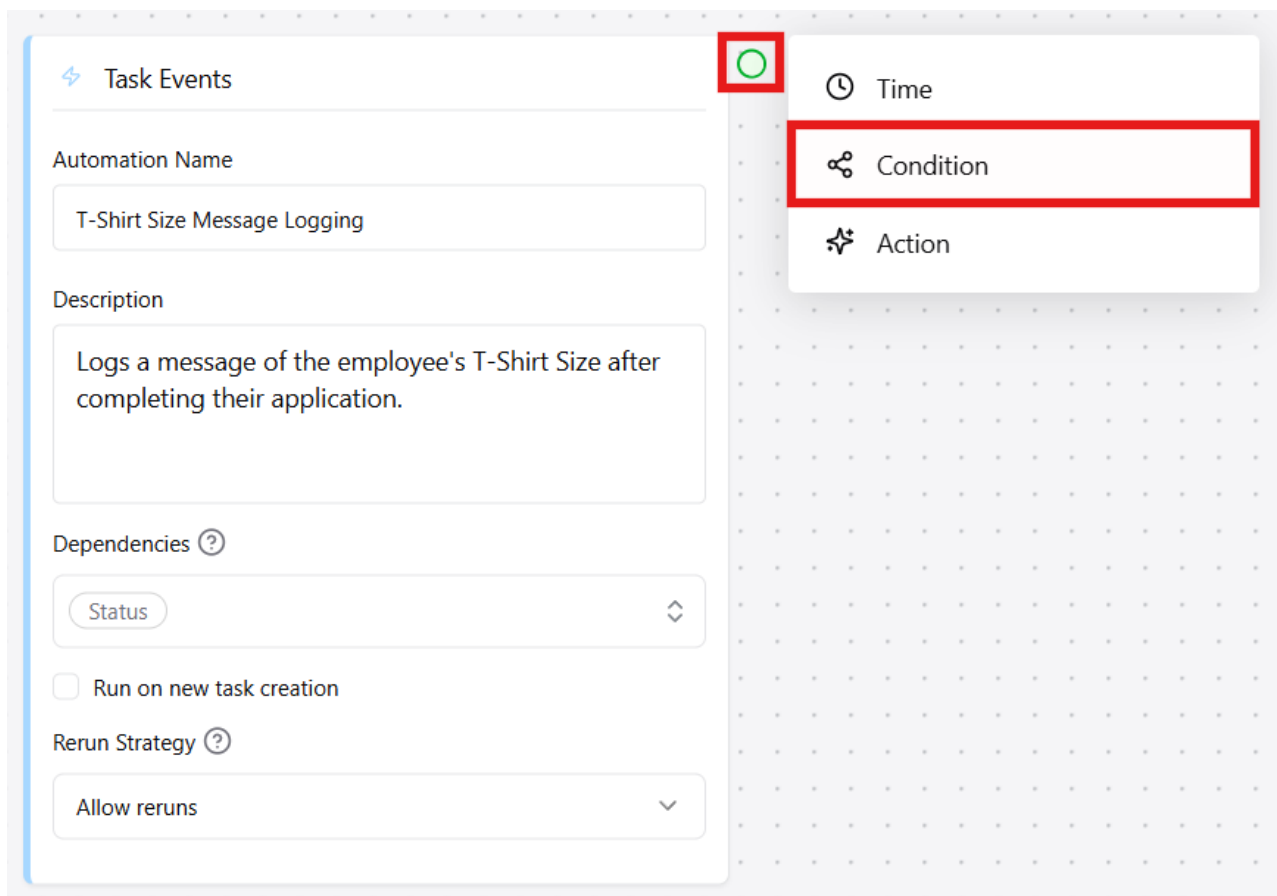
Cancel

Create

Once created, we can now add the necessary Condition.

Adding the Condition Node

Within the Automation Canvas, select the "O" to the right of the Start Node and select "Condition" to connect a Condition Node:



The screenshot shows the 'Task Events' panel on the left and a node selection menu on the right. The 'Task Events' panel includes fields for 'Automation Name' (T-Shirt Size Message Logging), 'Description' (Logs a message of the employee's T-Shirt Size after completing their application.), 'Dependencies' (Status), a checkbox for 'Run on new task creation', and 'Rerun Strategy' (Allow reruns). The node selection menu on the right has a green circle icon highlighted with a red box, and the 'Condition' option is also highlighted with a red box.

Task Events

Automation Name

T-Shirt Size Message Logging

Description

Logs a message of the employee's T-Shirt Size after completing their application.

Dependencies ?

Status

☐ Run on new task creation

Rerun Strategy ?

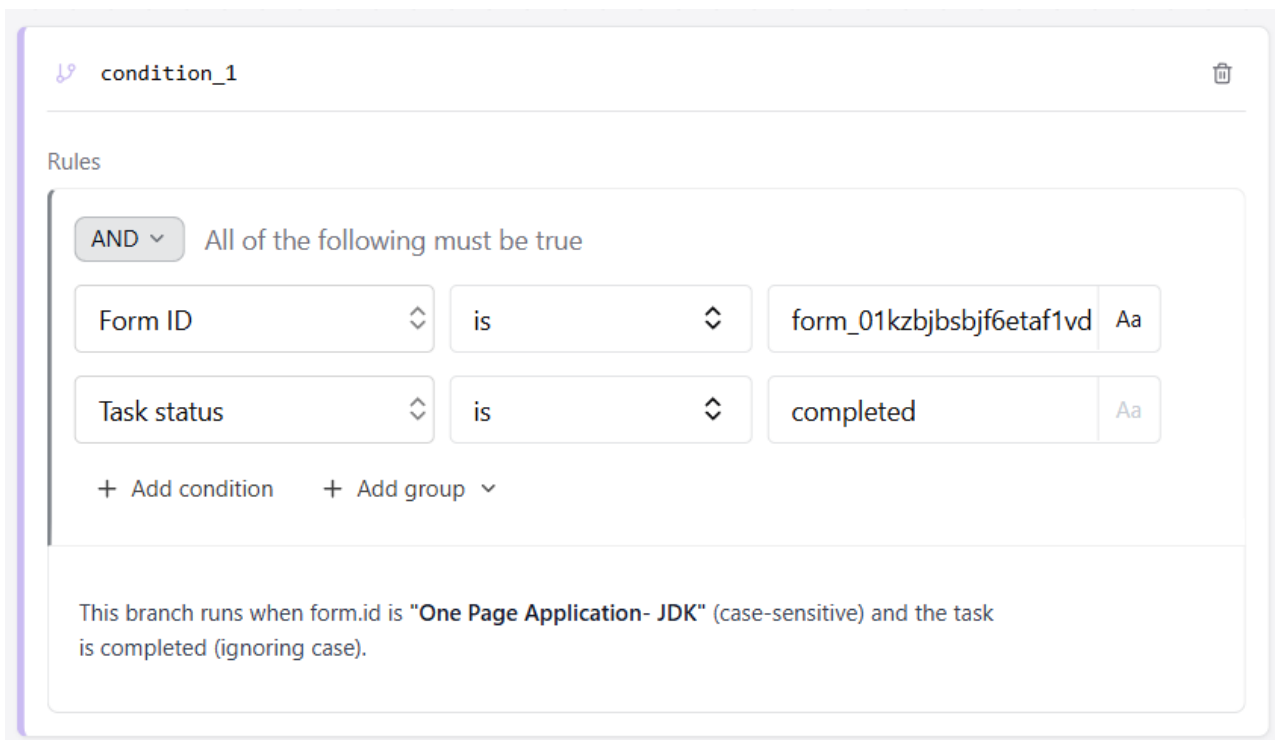
Allow reruns

Node Selection Menu:

- Time
- Condition**
- Action

Within the newly created Condition Node, select the following:

- Select "AND" within the dropdown as we will have two rules that will need to be followed.
- Form ID is "Paste the Form ID for the earlier step"
- Task Status is completed



condition_1

Rules

AND ▾ All of the following must be true

Form ID	is	form_01kzbjbsbjf6etaf1vd	Aa
Task status	is	completed	Aa

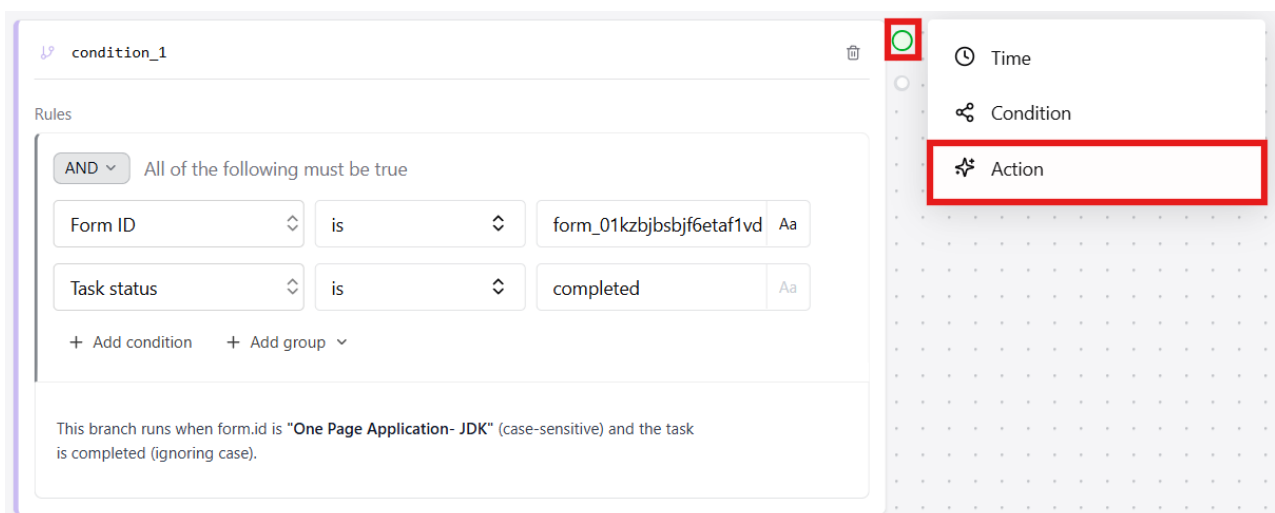
+ Add condition + Add group ▾

This branch runs when form.id is "One Page Application- JDK" (case-sensitive) and the task is completed (ignoring case).

With the Condition added, the final step is adding the Action Node.

Adding the Action Node

Within the Automation Canvas, select the "O" to the right of the Condition Node and select "Action" to connect an Action Node:



condition_1

Rules

AND ▾ All of the following must be true

Form ID	is	form_01kzbjbsbjf6etaf1vd	Aa
Task status	is	completed	Aa

+ Add condition + Add group ▾

This branch runs when form.id is "One Page Application- JDK" (case-sensitive) and the task is completed (ignoring case).

Time
Condition
Action

Within the newly created Action Node, select/enter the following:

- **Action:** HTTP Request
- **Method:** Post
- **URL:** <https://app.onboarded.com/api/v1/proxy/tempworks>

- **URL Parameters**

- employeeid set to {{employee.id}}

- **Headers**

- Onboarded-Target-URL set to https://api.ontempworks.com/Employees/{employeeid}/messages
- Authorization set to Bearer {your Onboarded API token saved from a previous step}
- Content-Type set to application/json

- **Body**

- Your message action code, plus the message itself. for example...

```
{
  "actionId": Insert Message Action ID Here,
  "message": "The employee's t-shirt size is {{employee.custom_attributes.tshirt_size}}}"
}
```

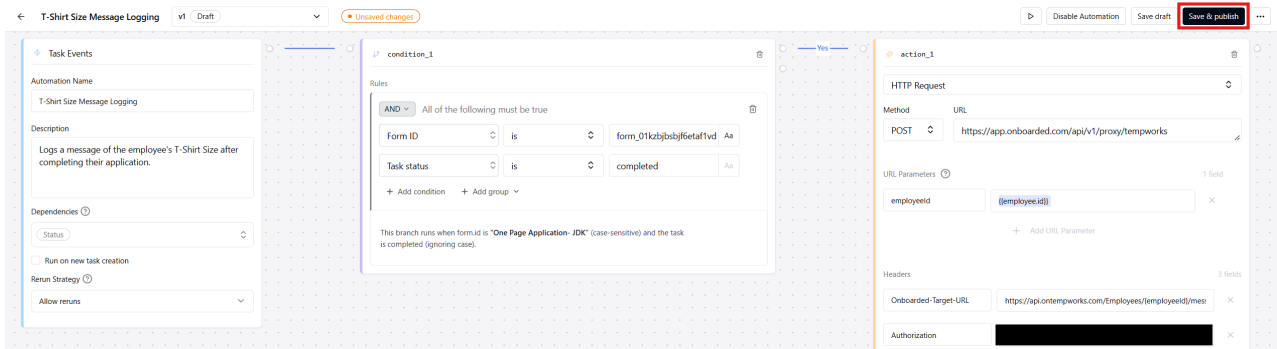
The screenshot shows a configuration window for an automation action named 'action_1'. The 'HTTP Request' tab is selected. The 'Method' is set to 'POST' and the 'URL' is 'https://app.onboarded.com/api/v1/proxy/tempworks'. Under 'URL Parameters', there is one parameter 'employeeid' with the value '{{employee.id}}'. The 'Headers' section contains three entries: 'Content-Type' with value 'application/json', 'Authorization' with a redacted value, and 'Onboarded-Target-URL' with value 'https://api.ontempworks.com/Employees/{employeeid}/mess'. The 'Body' section contains a JSON payload:

```
{
  "actionId": 40,
  "message": "The employee's t-shirt size is {{employee.custom_attributes.tshirt_size}}}"
}
```

The automation setup is complete and is ready to be published.

Publishing the Automation

Select the "Save & Publish" option at the top right to activate the automation:



The "Status" badge changes from "Draft" to "Published", and the "Publish" button becomes inactive.

Testing the Automation

To test the automation, ensure the employee is completing the correct form that was indicated within the automation. The automation should execute immediately, and the message should be logged on that employee record within Beyond.

Note This has been one example for how to create an automation, but the options available are vast. Try experimenting with the options available to you, and please contact TempWorks Support in the event you have any questions.

Related Articles