How-To Guide for Universal Workflow

How to Create and Customize a Universal Workflow Form
Last Updated August 2025

Four Components of Creating a Workflow

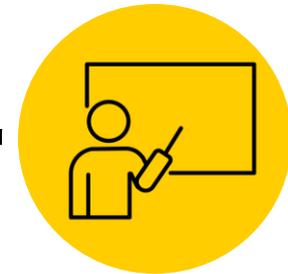

Name Form & Create Link

Customize the Form Fields

Adjust form settings/routing

Publish in test or production

Creating a Form

Naming and Creating a Customizable Link

Creating a Form

Step One: Create a New Form

- Route to workflow.uiowa.edu and log-in with credentials
- Underneath the "Forms" tab in the header, select "Create a New Form" as shown below
  - Note that other forms that are owned or shared with this log-in can also be found underneath the "Forms" tab.

Step Two: Choose Between FormBuilder or Developer Forms

- Please note that in most cases, unless seeking special circumstances, a FormBuilder will be used. Consult API guides on this page for additional help.

Step Three: Name the Form

- Type in a name for the form with the department abbreviation name at the front (i.e. CS − Course Form)

See Next slide for Departmental Abbreviation

- Select appropriate office for the new form

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Step Three: Name the Form

*When naming your Workflow form, begin the title with your <u>Department Abbreviation</u>.

Example: "HSHP - Honors Program"

NOT:

"Health, Sports and Human Physiology – Honors Program"

Listed to the right are the 49 departments and divisions for CLAS.

- AFAM
- AMST
- ANTH
- BIO
- CHEM
- CINE
- CLAS
- CLASSICS
- CLCL
- COMMST
- CS
- CSD
- CW

- DANCE
- DEL
- DIP
- ENGL
- ESL
- GWSS
- HSHP
- HIST
- LLLC
- MATH
- MUSIC
- P&A

- PBS
- PHIL
- POLISCI
- PROD
- RELIG
- RHET
- S&P
- SAAHD
- SEES
- SHOP
- SJMC
- SOC
- SSW
- STATS
- THEATRE
- WRIT

Step Four (Optional): Customize Link

My Forms > **Dashboard** > Form Builder > Form Settings > Edit Route > Test Deployment >

- Navigate to the Dashboard tab on the Workflow header

Form Custom Url

https://workflow.uiowa.edu/form/ cs-course-form

Custom Url Successfully Changed

Changes will cause any previous Custom Form URLs to no longer work.
- Prod: https://workflow.uiowa.edu/form/cs-course-form
- Test: https://workflow.uiowa.edu/form/test/cs-course-form

- Customize the form URL to match with the form name or otherwise:
  - The new links that correspond with test or production are below.
  - Note that this customization causes the previous random generated links from prod or test to stop working.

Form Fields

Form Builder

Upon creating a new form, a blank template alongside field options will appear on the screen.

Form Builder

Important fields in Form Builder, and how they appear as you insert them.

Form Builder

Text Input - Takes a string of text as input. Both "short text" (one line) and "long text' (multiple lines) are field options.

Add Fields by Dragging to the Right

A Text Input	Numeric
Multiple Choice	Single Checkbox
Postal Address	Phone Number
Date	Time
Email Address	Website URL
UI Person Search	UI Office Search
UI Advisor	UI Program of Study
UI Course Search	UI Accounting MFK
Supporting Text	••• Section Break

Preview Form   Save & Continue ❯   Saved

Form Builder

Multiple Choice - Allows for a question with confined set of different answer choices.

Form Builder

Multiple Choice - The three different options for multiple choice are shown. From top to bottom: checkboxes (allows for multiple answers to be selected), radio buttons (can only accept one answer selected), and drop down (can only accept one answer selected)

Form Builder

- *Multiple Choice -* The option to add "other" can be checked off in the choices settings as seen above.

- If a choice has a check next to it. it is automatically populated to that option when the form is in test or production. To avoid auto-populated fields, simply uncheck all the boxes

- The choice list types are as follows
  - Static Choice List: Determine the options on your own, as shown above
  - Predefined Choice List: The multiple choice options align with an already made list, such as days of the week, months of the year, True/False, etc.

Form Builder

- *UI Person Search -* A field that searches through specified University of Iowa personnel (such as UI students, UI Employees, all, etc.) and gathers first name, last name, middle initial, Hawk-ID, University ID, job title (e.g., Project Manager) and classification (e.g., Clas-Clas Administration)

Add Fields by Dragging to the Right

A Text Input	Numeric
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Supporting Text	Section Break

Preview Form | Save & Continue | Saved

Form Builder

- *UI Person Search -*

    This search can be customized to fit desired search. Some criteria include searching populations (such as those who are inactive or restricted) and allow collection of multiple names

Form Builder

- *UI Office Search* - Takes in an Org/Office Code (e.g., '11' for CLAS) or College Name (e.g., 'Engineering' for College of Engineering) and allows user to select from a list of offices that match criteria

Form Builder

- *UI Advisor -* UI Advisor takes student name or student University ID and returns a list of their academic advisors to select from

Form Builder

Section Break - Displays text in larger font without style editing capabilities that supporting text has. Example shown below.

Conditional Show/Hide Field Options

- Each field has the option to enable conditional show/hide. This feature is especially useful when certain information only needs to be collected on the form in particular situations.

- In this example, the "What's your favorite CS class?"" question only applies to CS majors. Therefore, conditional show/hide can limit the question's appearance on the form to only when the question "Are you a CS major?" is answered with "Yes."

Route Editing

Route Editing

- Click the "Edit Route" navigation button. Next click on the "+ Add New Stop" button and then enter your new stop name. In this case we called it "Processing." After which click on the "+ Add New Stop"

Route Editing

- Now we have to decide who we are sending the *package* to. We prefer to have a "Role" for this person. (see #1). Then we click on "Select Here". (see #2) And then a list of roles will pop up. (see #3 below).
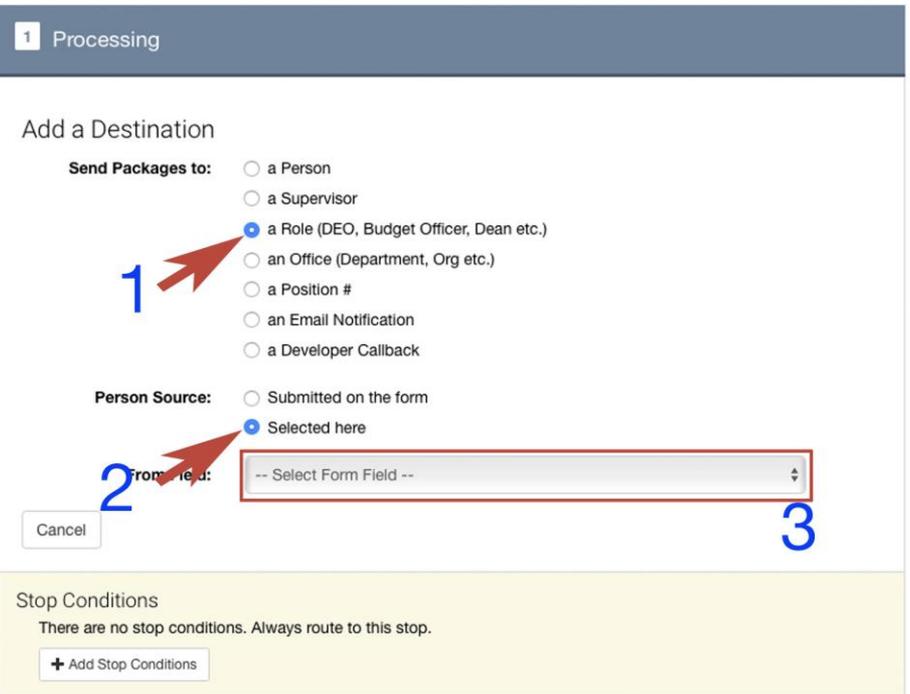
Route Editing

- #3: Choose the organization/group that the individual you are giving permissions to. In this case we choose "Academic Administrator - Department."

Route Editing

- #4: A Person Search box will appear. Enter the last name and a list will show up. We are choosing Adam Jaschen a Admin. Services Coordinator.

Route Editing

- #5: A box will show up in your browser. We are choosing "Signature Permitted" in this case. After clicking it, you may choose other specifics for the approval process. Then click the green button "Update Destination", and they are added.

Route Editing

- Route Stops: #1 Add Stop Conditions

- Stop Conditions allow determined responses to fields on the form impact if a route destination is reached.

- In this example, the "Processing" route stop is reached only if the question "Are you a CS major?" response is "Yes"

This option is helpful when distinguishing routing to different department's faculty, staff, etc.

Route Editing

- Route Stops: #2 Edit Destination Options
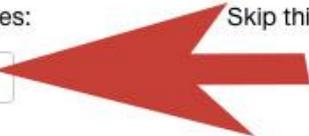
Any changes that need to be made to a destination can be made by selecting the "Edit Destination Options" button. Changes include:
- Approver Rights (signature required, edit only, view only, etc.)
- Escalation Rules (sends a reminder if approver hasn't signed in allotted time frame)
- Allow Delegation (Allow approver to assign signature rights to others)

Route Editing

- Route Stops: #1 Add Stop Conditions

Test Deployment

Test Deployment

- Deploy Form & Route to Test Server
- Use the blue "Deploy" button below to deploy your form & route to the Test Environment. More information is available in the [Test & Production Deployment]() help article
    - More information about customizing form URL is found on slide 9

My Forms > Dashboard > Form Builder > Form Settings > Edit Route > Test Deployment >

Wiki - How To Test Server Deployment

O Not Deployed to Test Server

Deploy to Get a Form Entry URL

Deploy Form & Route to Test Server

Use the blue "Deploy" button below to deploy your form & route to the Test Environment. More information is available in the Test &

Deploy Draft Form Configuration to Test >

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Deploy Form to Production Server

Use the blue "Deploy" button below to deploy your form & route to the Production Environment. More information is available in the Test & Production Deployment help article

Remember: No personally identifiable information questions can be used
- (More information about customizing form URL is found on slide 9)

My Forms > Dashboard > Form Builder > Form Settings > Edit Route > Test Deployment > **Production Deployment**

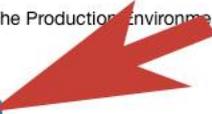## Wiki - How To Production Server Deployment

⊗ Not Deployed to Production Server

Deploy to Get a Form Entry URL

Deploy Form & Route to Production Server

Use the blue "Deploy" button below to deploy your form & route to the Production Environment. More information is available in the Test & Production Deployment help article

Deploy Test Form Configuration to Production ›

Some Things to Consider

- Here are a few things to consider when creating a new form.

  - Does a form already exist that meets my needs and is in use?

  - Will this form be used multiple years?
    - Instead of creating many forms, have one form with a dropdown list containing years.

  - Will this form be used multiple sessions?
    - Instead of creating many forms, have one form with a dropdown list containing sessions.

Some Things to Consider

- When adding an email address to your text, you will need to go into the field editor. In between brackets, type the email. Next add parenthesis and "http://mailto:" and then email. Like so:

    [cs-info@list.uiowa.edu](http://mailto:cs-info@list.uiowa.edu)

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Any Questions?

Please Contact:

CLAS IT Workflow Team
clas-workflow-forms@uiowa.edu

➜ **https://workflow.uiowa.edu/**

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