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# 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

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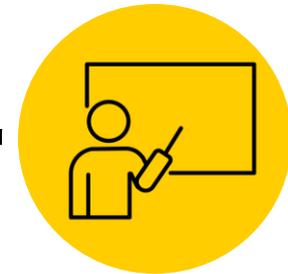
**Name Form &  
Create Link**



**Customize the  
Form Fields**



**Adjust form  
settings/routing**



**Publish in test  
or production**

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# 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.

**IOWA** Universal Workflow kmichalski

Inbox Drafts Offices **Forms** Reports Tools Settings Help Self-Service | MAUI

My Forms **Create A New Form**

## My Forms

Form Name	Test Status	Prod Status	Quick Links
<a href="#">AMST - Evaluation of Department TAs</a> College Lib Arts and Sciences (11)	<span>Deployed to Test</span> <span>Active in Test</span>	<span>Deployed to Production</span> <span>Active in Production</span>	<span>View Dashboard</span>

# 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.

[Inbox](#) [Drafts](#) [Offices](#) [Forms](#) [Reports](#) [Tools](#) [Settings](#) [Help](#)

[Self-Service](#) | [MAUI](#)

My Forms [Create A New Form](#)

## Create a New Workflow Form

### Create a New FormBuilder Form

Easy Form Creation

The FormBuilder tool makes creating Workflow ready forms easy! Click the button below to start building your form.

[API Guide](#)

For an explanation of advanced functionality, check out the [Form Builder Developer Guide](#)

[+ Create a New FormBuilder Form](#)

[Clone an Existing FormBuilder Form](#)

### Create a New Developer Form

Advanced Form Creation

If you're not a programmer and you don't have one in your department that you can bribe, sorry, this option isn't for you. Developer Forms require accessing our API directly and that takes some serious coding chops.

[API Guide](#)

Before you create a new Developer Form, check out the [Workflow Integration Guide](#)

[+ Create a New Developer Form Integration](#)

# 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

Create a New FormBuilder Form ✕

**Name Your New Form**

CS – Course Form

**Select an Office for Your New Form**

Office Name	Office Code
<input type="button" value="Select"/> Office Of Academic Programs Sub Department	11-1900-00200
<input type="button" value="Select"/> CLAS Human Resources Sub Department	11-1900-00500
<input type="button" value="Select"/> clas_it_approve Sub Department	11-1110-clas_it_approve
<input type="button" value="Select"/> deo_pcard_trav Sub Department	11-1110-deo_pcard_trav
<input type="button" value="Select"/> clas_it_approve Sub Department	11-1900-clas_it_approve
<input type="button" value="Select"/> kearney_researc Sub Department	11-1900-kearney_researc
<input type="button" value="Select"/> CLAS COVID-19 Sub Department	11-1110-clas_covid19
<input type="button" value="Select"/> CLAS COVID-19 Sub Department	11-1900-clas_covid19
<input type="button" value="Select"/> Undergrad Programs Advising Sub Department	11-1900-00210

# Step Three: Name the Form

\*When naming your Workflow form, begin the title with your Department Abbreviation.

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

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.

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

## Test test test

Attachment Settings 0 Authorization

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 *less than a minute ago*

Add a Custom Logo

Choose File No file chosen  
Drag & drop your file into this space to upload

Change Form Display Title

**Test test test**

Edit Form Display Title



Form Attachments

Allow Attachments on Form

Custom Approval Message

Custom Text  
This message shows up for approvers of the package.



# Form Builder

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

The image shows the Form Builder interface. On the left is a palette titled "Add Fields by Dragging to the Right" containing various field types. On the right is a preview of the form with dashed boxes around each field. Red arrows point from the field in the palette to its rendered version in the form.

**Field Palette:**

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

**Form Preview:**

- Text Input:** A simple text input field.
- Select a Choice:** A form with radio buttons for "First Choice", "Second Choice", and "Third Choice", and an "Other" option with a text input field.
- Email Address:** A text input field with a search icon on the right.
- UI Person Search:** A search field with the placeholder "Search by Name or University ID" and a "Search" button.
- UI Advisor:** A search field with the placeholder "Search by Name or University ID" and a "Search" button, followed by a "Select Advisor" label.
- UI Course Search:** A section titled "No Course Selected" with a dropdown menu showing "Fall 2023" and a search field with the placeholder "Search for a Course" and a "Search" button.

# 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

<b>A</b> 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.

Add Fields by Dragging to the Right

<input type="text"/> A Text Input	<input type="text"/> Numeric
<input checked="" type="checkbox"/> Multiple Choice	<input type="checkbox"/> Single Checkbox
<input type="text"/> Postal Address	<input type="text"/> Phone Number
<input type="text"/> Date	<input type="text"/> Time
<input type="text"/> Email Address	<input type="text"/> Website URL
<input type="text"/> UI Person Search	<input type="text"/> UI Office Search
<input type="text"/> UI Advisor	<input type="text"/> UI Program of Study
<input type="text"/> UI Course Search	<input type="text"/> UI Accounting MFK
<input type="text"/> Supporting Text	<input type="text"/> Section Break

[Preview Form](#) [Save & Continue >](#) Saved

# 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)

The image displays three examples of multiple choice form elements, each labeled "Select a Choice".

- Top Example (Checkboxes):** A yellow background contains the text "Select a Choice" followed by four options: "First Choice" (checked), "Second Choice", "Third Choice", and "Other". A text input field is positioned below the "Other" option. A toolbar in the top right corner includes "Move", "Duplicate", and "Delete" icons.
- Middle Example (Radio Buttons):** A white background contains the text "Select a Choice" followed by four options: "First Choice" (selected with a radio button), "Second Choice", "Third Choice", and "Other". A text input field is positioned below the "Other" option.
- Bottom Example (Dropdown):** A white background contains the text "Select a Choice" followed by a dropdown menu showing "First Choice" with a downward arrow.

# 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.

Choices

Choice List Type

Static Choice List

Predefined Choice List

Dynamic Choice List

Other Option  Show an 'Other' Choice

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<input checked="" type="checkbox"/>	First Choice	1st	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="checkbox"/>	Second Choice	2nd	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="checkbox"/>	Third Choice	3rd	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="checkbox"/>	Other		

# 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

<input type="text"/> A Text Input	<input type="text"/> Numeric
<input type="checkbox"/> Multiple Choice	<input type="checkbox"/> Single Checkbox
<input type="text"/> Postal Address	<input type="text"/> Phone Number
<input type="text"/> Date	<input type="text"/> Time
<input type="text"/> Email Address	<input type="text"/> Website URL
<input type="text"/> UI Person Search	<input type="text"/> UI Office Search
<input type="text"/> UI Advisor	<input type="text"/> UI Program of Study
<input type="text"/> UI Course Search	<input type="text"/> UI Accounting MFK
<input type="text"/> Supporting Text	<input type="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

The screenshot shows a configuration window for a 'Person Field'. At the top, there are buttons for 'Close', 'Duplicate', and 'Delete'. The main configuration area includes:

- Field Type:** Person Field
- Field Label:** UI Person Search
- Default Person:**  Default to Form Initiator
- Multiple Names:**  Allow Collection of Multiple Names
- Search For:**  UI Employees,  UI Students,  Other
- Special Populations:**  Include Inactive People in Results,  Include Restricted People in Results

Below this is a section titled 'Field Options' with several checkboxes and their descriptions:

- Field is Required**
- Field is Read-Only**  
Field data can't be edited. A Default Answer or Passed Value is required
- Field is 'For Office Use Only'**  
The initiator of the form will not be able to see this field but approvers will
- Field is Hidden**  
Field data is hidden from initiators & approvers. A Default Answer or Passed Value is required
- Restart Workflow Routing on Edit**  
When data changes for this field, the form will restart routing and require signatures from all approvers again.

# 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

Add Fields by Dragging to the Right

 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

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

Add Fields by Dragging to the Right

 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

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

Add Fields by Dragging to the Right

 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	 <b>Section Break</b>

[Preview Form](#) [Save & Continue >](#) Saved

# 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.

The image shows a form with two questions and a configuration panel. The first question is "Are you a CS major?" with radio buttons for "Yes" and "No". The second question is "What's your favorite CS class?" with radio buttons for "Discrete Structures", "Data Structures", "Algorithms", "Programming Language Concepts", and "Other" (with a text input field). To the right, a "Conditional Show / Hide" panel is open, showing a checked box for "Enable Conditional Show / Hide Options". Below this, it says "Show this field only if All of the following conditions are met". A single condition is listed: "Are you a CS major?" with a dropdown menu set to "Yes" and a dropdown menu set to "is selected". There is an "Add Condition" button below the list.

- 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"

The screenshot displays the IOWA Universal Workflow interface. At the top, there is a yellow header with the IOWA logo and 'Universal Workflow' text. Below the header is a navigation menu with options: Inbox, Drafts, Offices, Forms (underlined), Reports, Tools, Settings, and Help. On the right side of the header, there is a user profile icon and a dropdown arrow. Below the navigation menu, there is a breadcrumb trail: My Forms > Dashboard > Form Builder > Form Settings > Edit Route > Test Deployment >. The main content area is titled 'Edit Form Route'. On the left, there is a 'Route Stops' section with a '+ Add New Stop' button circled in red. Below this section are two buttons: 'Save Route & Continue' and 'Save Route'. A modal dialog titled 'Please Name the New Stop' is open, showing a text input field with 'Processing' entered. The input field and the '+ Add New Stop' button in the modal are also circled in red. Red arrows point from the circled button in the main interface to the modal, and from the modal's input field and button back to the main interface.

# 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).

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

### Route Stops

+ Add New Stop

1 Processing Move Delete

Save Route & Continue Save Route

### 1 Processing

#### Add a Destination

**Send Packages to:**

- a Person
- a Supervisor
- a Role (DEO, Budget Officer, Dean etc.)
- an Office (Department, Org etc.)
- a Position #
- an Email Notification
- a Developer Callback

**Person Source:**

- Submitted on the form
- Selected here

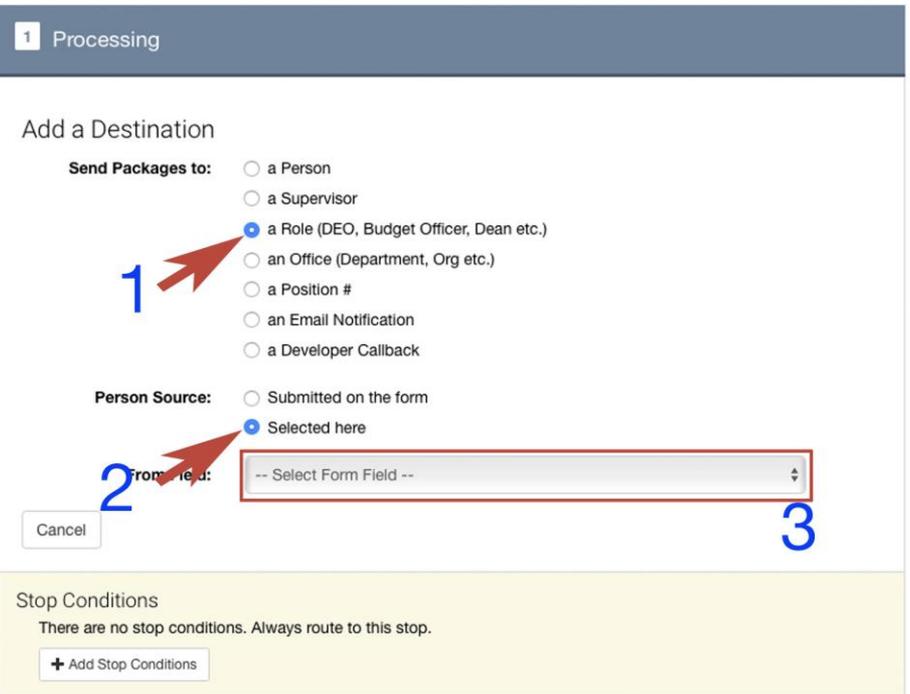
From Field: -- Select Form Field --

Cancel

#### Stop Conditions

There are no stop conditions. Always route to this stop.

+ Add Stop Conditions



# Route Editing

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

1 Processing

Add a Destination

Send Packages to:

- a Person
- a Supervisor
- a Role (DEO, Budget Officer, Dean etc.)
- an Office (Department, Org etc.)
- a Position #
- an Email Notification
- a Developer Callback

Select	Academic Administrator - Department	Department	Academic
Select	Academic Administrator - Org	Org	Academic
Select	Academic Administrator - Sub-Department	Sub-Dept	Academic
Select	Academic DDEO - Department	Department	Academic
Select	Academic DDEO - Org	Org	Academic
Select	Academic DDEO - Sub-Department	Sub-Dept	Academic
Select	Associate Dean for Faculty	Org	Administrative
Select	Business Officer	Org	Administrative
Select	Business Officer - Cash Handling	Org	Administrative
Select	Business Officer Assistant	Org	Administrative
Select	Capital Assets Inventory Contact	Department	Administrative
Select	DEO	Department	Administrative

# 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.

Role Source:  Submitted on the form  
 Selected here

Person Search

jaschen

Search

	Name	Person Type	Classification
Select	Ammer, John	Student	Student - College of Education
Select	Ammer, Julie A	Faculty/Staff	Nurse Clinician
Select	Jaschen, Adam R	Faculty/Staff	Admin Services Coordinator

Cancel

# 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.

1 Processing + Add New Destination

Stop Conditions  
There are no stop conditions. Always route to this stop.  
+ Add Stop Conditions

Academic Administrator - Department of 'Jaschen, Adam R' Remove

**Approver Rights**  Signature Required  
 **Signature Permitted**  
 Edit Only  
 View Only

**Escalation**

**Allow Delegation**  Allow this approver to delegate their signature rights to others

**Allow Out of Office**  If the approver has an "Out of Office" set, delegate their signature rights

**Can Not Resolve Rules**  
 Skip this destination and continue routing. Do not email anyone.  
 Skip this destination and continue routing. Email the Form Editor(s).  
 Hold this package to prevent further routing. Email the Form Editor(s).

✓ Update Destination Cancel

# 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

Academic Administrator - Department of 'Jaschen, Adam R'



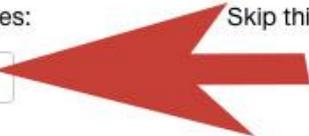
Approver Rights: ■ PERMITTED

Escalation Rules: No escalation rules set.

Signature Delegation: Signature Delegation is allowed.

Out of Office: Out of Office rules are followed.

Can Not Be Resolved Rules: Skip this destination. Email the Form Editor(s).



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

The screenshot displays a web interface for editing a route. At the top, a blue header bar contains a tab labeled '1 Processing' and a button '+ Add New Destination'. Below this is a yellow section titled 'Stop Conditions' with the text 'There are no stop conditions. Always route to this stop.' A large blue number '1' is positioned to the right of this text. A red arrow points from the '1' to a button labeled '+ Add Stop Conditions'.

Below the yellow section is a white section for 'Academic Administrator - Department of 'Jaschen, Adam R''. A red 'Remove' button is in the top right. The section lists several attributes:

- Approver Rights: ■ PERMITTED
- Escalation Rules: No escalation rules set.
- Signature Delegation: Signature Delegation is allowed.
- Out of Office: Out of Office rules are followed.
- Can Not Be Resolved Rules: Skip this destination. Email the Form Editor(s).

A large blue number '2' is positioned to the right of the 'Can Not Be Resolved Rules' text. A red arrow points from the '2' to a button labeled 'Edit Destination Options'.

# 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

 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 >



# 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

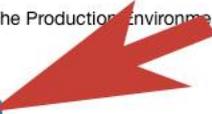
Not Deployed to Production Server

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

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- 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)

The screenshot shows a text editor interface with a toolbar containing options like H1, H2, H3, B, I, and link icons. The text area contains a paragraph of text with a link: [\[cs-info@list.uiowa.edu\]\(http://mailto:cs-info@list.uiowa.edu\)](mailto:cs-info@list.uiowa.edu). A red box highlights the link, with arrows pointing to the brackets and the parenthesis. Labels 'Brackets' and 'Parenthesis' are placed below the box.

The screenshot shows a form titled 'Proposal Defense Results'. A yellow callout box contains the text: 'The advisor will receive this form in workflow two times in succession. The first time the committee membership and other information provided by the student. The second time, **please hold the form in your workflow inbox until the proposal defense is held**. After the defense, return to this workflow form, click the "Edit Submitted Data" button, and complete the Proposal Defense Results section, then save and submit the form. Please send questions about this process to [cs-info@list.uiowa.edu](mailto:cs-info@list.uiowa.edu)'. A red arrow points from the callout box to the 'Is Proposal Defense Complete?' field. Below this field are radio buttons for 'No' (selected) and 'Yes'. Further down is a 'Proposal Defense Date' field with a calendar icon and the date '11/10/2022'. The form also includes 'Move', 'Duplicate', and 'Delete' buttons at the top right.

**IOWA**

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# Any Questions?

*Please Contact:*

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

→ <https://workflow.uiowa.edu/>

**IOWA**