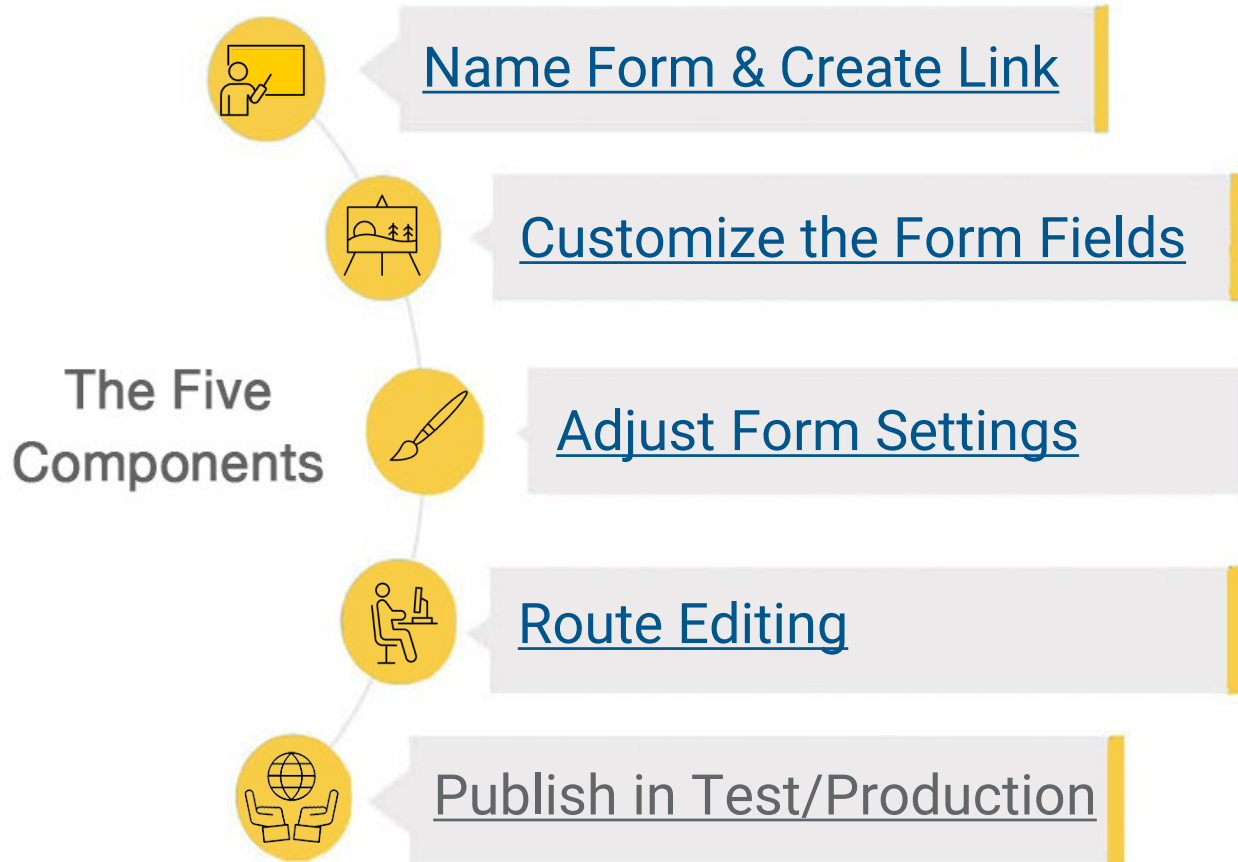




Five Components of Creating a Workflow



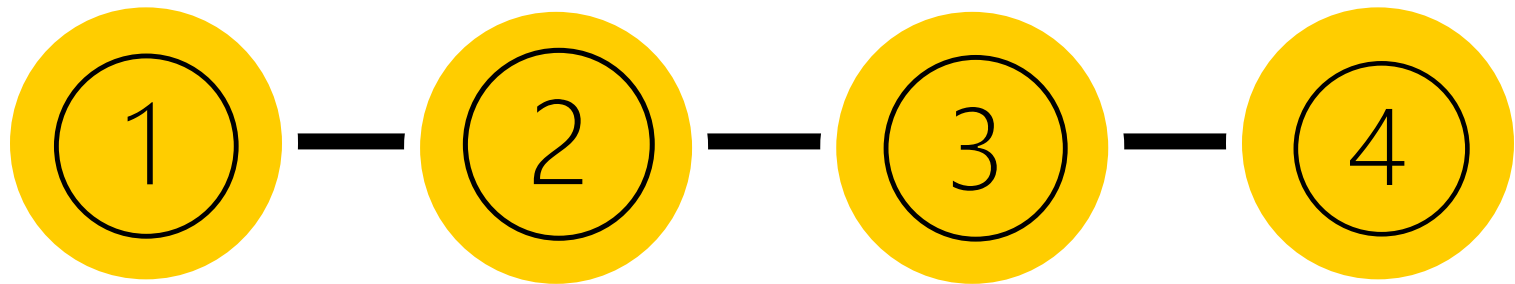
Creating a Form

Naming and Creating a Customizable Link

Name and Create Form



Steps to Creating a Form



Begin a New Form

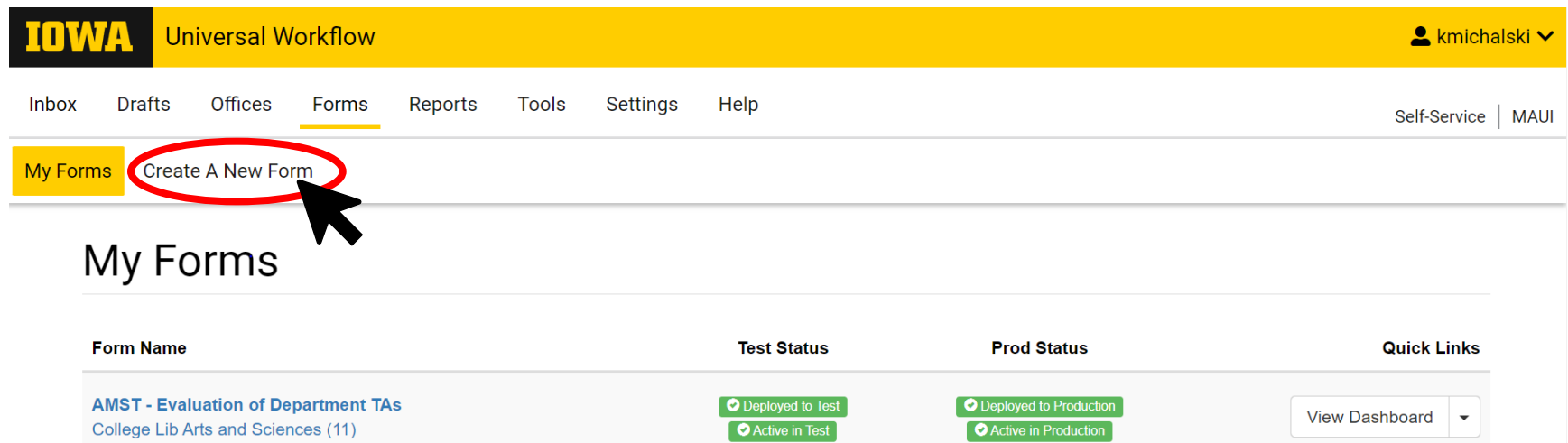
**Choose Form Builder
or Developer Form**

**Name Form with Dep
Abbreviation**

**Customize the link
(optional)**

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.



The screenshot displays the 'Universal Workflow' application interface. The top navigation bar is yellow and contains the 'IOWA' logo, the text 'Universal Workflow', and a user profile icon for 'kmichalski'. Below this is a secondary navigation bar with tabs for 'Inbox', 'Drafts', 'Offices', 'Forms', 'Reports', 'Tools', 'Settings', and 'Help'. The 'Forms' tab is selected and highlighted with a yellow underline. To the right of these tabs are links for 'Self-Service' and 'MAUI'. Below the navigation bar is a sub-header area with a yellow background containing 'My Forms' and a button labeled 'Create A New Form'. The 'Create A New Form' button is circled in red, and a black mouse cursor is pointing at it. Below this is the main content area titled 'My Forms', which contains a table of form entries.

Form Name	Test Status	Prod Status	Quick Links
AMST - Evaluation of Department TAs College Lib Arts and Sciences (11)	Deployed to Test Active in Test	Deployed to Production Active in Production	View Dashboard ▼

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

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:

"HHP - Honors Program"

NOT:

"Health and Human Physiology - Honors Program"

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

- AFAM
- AMST
- ANTH
- ASLL
- BIO
- CHEM
- CINE
- CLAS
- CLASSICS
- CLCL
- COMMST
- CS
- CSD
- CW
- DANCE
- DEL
- DIP
- DPA
- DWLLC
- EES
- ENGL
- ESL
- F&I
- GERMAN
- GSS
- GWSS
- HHP
- HIST
- LING
- MATH
- MUSIC
- P&A
- PBS
- PHIL
- POLISCI
- PROD
- RELIG
- RHET
- S&P
- SAAH
- 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.

Customize 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

Authorization

Add Fields by Dragging to the Right

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

IOWA

View >> Header and Footer >> Add Unit Name

Form Builder

To add fields in Form Builder, you simply drag and drop the sections into the form. Do not forget to "Save & Continue."

The screenshot illustrates the Form Builder interface. On the left, a panel titled "Add Fields by Dragging to the Right" contains a grid of field types: 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, and Section Break. At the bottom of this panel are buttons for "Preview Form" and "Save & Continue >".

On the right, a preview of the form is shown, divided into sections by dashed lines. Red arrows point from the field types in the left panel to their respective fields in the form:

- Text Input**: A simple text input field.
- Select a Choice**: A section with three radio buttons labeled "First Choice", "Second Choice", and "Third Choice", followed by an "Other" label and a text input field.
- Email Address**: A text input field with a small envelope icon on the left.
- UI Person Search**: A search field with the placeholder text "Search by Name or University ID" and a blue "Search" button.
- UI Advisor**: A section titled "Student Name" with a search field and "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 text "Search for a Course" and a "Search" button.

At the bottom of the form preview, it says "Saved less than a minute ago".

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.

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 label "Select a Choice" and four options: "First Choice" (checked), "Second Choice", "Third Choice", and "Other". A text input field is below "Other". A toolbar with "Move", "Duplicate", and "Delete" icons is in the top right.
- Middle Example (Radio Buttons):** A white background contains the label "Select a Choice" and four options: "First Choice" (selected), "Second Choice", "Third Choice", and "Other". A text input field is below "Other".
- Bottom Example (Dropdown):** A white background contains the label "Select a Choice" and a dropdown menu with "First Choice" 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.

Choices

Choice List Type

Static Choice List

Predefined Choice List

Dynamic Choice List

Other Option Show an 'Other' Choice

<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 'Close', 'Duplicate', and 'Delete' buttons. 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

Supporting Text – Displays a body of text in smaller font, with editing abilities such as italics, bold, underline, bullet list, number list, and more.

Add Fields by Dragging to the Right

<input type="text"/> Text Input	<input type="text"/> Numeric
<input type="checkbox"/> Multiple Choice	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
UI Person Search	UI Office Search
UI Advisor	UI Program of Study
UI Course Search	UI Accounting MFK
Supporting Text	Section Break

Close Duplicate Delete

Field Type **Read-Only Supporting Text Field**

H1 H2 H3 B I

This is some read-only supporting text. For more information, refer to the following resources:

- Wikipedia [Link One](http://wikipedia.com)
- ICON [Link Two](http://icon.uiowa.edu)

This is some read-only supporting text. For more information, refer to the following resources:

- Wikipedia Link One
- ICON Link Two

When do you graduate?

Spring 2023

Fall 2023

Spring 2024

Other

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

<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

Close Duplicate Delete

Field Type **Section Break Field**

Section Break Title

Field Options

Field is 'For Office Use Only'
The initiator of the form will not be able to see this field but approvers will

Conditional Show / Hide

Enable Conditional Show / Hide Options

Part II: Student Questions

What's your favorite CS class?

- Discrete Structures
- Data Structures
- Algorithms
- Programming Language Concepts
- Other



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 conditional show/hide 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). The conditional show/hide panel is titled "Conditional Show / Hide" and has a checked checkbox for "Enable Conditional Show / Hide Options". Below this, it says "Show this field only if" followed by a dropdown menu set to "All", and "of the following conditions are met". There is one condition listed: "Are you a CS major?" with a dropdown set to "Yes" and "is selected" with a dropdown arrow. An "Add Condition" button is at the bottom of the panel.

- 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."

Adjust Form Settings



Form Settings

- Navigate to the Form Settings tab on the Workflow header

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

- Here, the following settings can be adjusted and customized:
 - Visible Inbox Fields (Required)
 - Inbox Summary Fields (Required)
 - Routing Options (Optional)
 - Editing Options (Optional)
 - Voiding Options (Optional)
 - Notification Options (Optional)
 - Help Desk Tools (Optional)
- Each of these settings will be briefly explained in the following slides.

Required Settings: Visible Inbox Fields

- Select 1-5 fields that will be visible/searchable within the Inbox.
 - It is recommended to select fields with easily identifiable and concise information (e.g. Name, HawkID, Semester, etc.) Avoid fields with ambiguous information such as long responses and comments

Visible Inbox Fields Required (max of 5)

Designate which fields will be visible & searchable within the Inbox. They will also have their own sortable column within the Inbox when the "Form Type" filter is used.

- Inbox Fields**
- Name of TA
 - Name of Faculty Course Supervisor
 - Semester
 - Year
 - Course Number
 - Date of Observation
 - Describe in 4 or 5 sentences the content and process of the class:

Office: Human Resources Quick Views: -- Select Quickview --

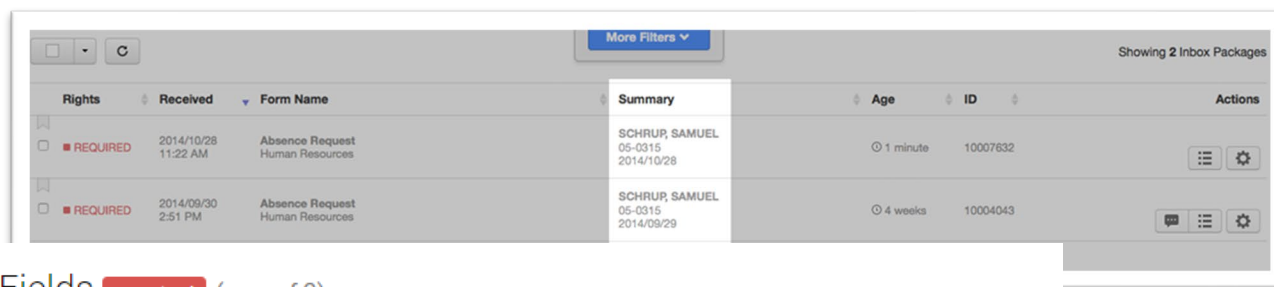
Showing 2 Inbox Packages

Rights	Received	Form Name	Employee	Department	First Request Date	Age	ID	Actions
<input type="checkbox"/> ■ REQUIRED	2014/10/28 11:22 AM	Absence Request	SCHRUP, SAMUEL	05-0315	2014/10/28	1 minute	10007832	[List] [Settings]
<input type="checkbox"/> ■ REQUIRED	2014/09/30 2:51 PM	Absence Request	SCHRUP, SAMUEL	05-0315	2014/09/29	4 weeks	10004043	[List] [Settings]

10/28/2014 11:22 AM Refresh Inbox

Required Settings: Inbox Summary Fields

- Select 1-3 fields from Visible Inbox Fields that will create the summary column in the Inbox view.
 - An example is shown below



Rights	Received	Form Name	Summary	Age	ID	Actions
<input type="checkbox"/> REQUIRED	2014/10/28 11:22 AM	Absence Request Human Resources	SCHRUR, SAMUEL 05-0315 2014/10/28	1 minute	10007632	[More] [Settings]
<input type="checkbox"/> REQUIRED	2014/09/30 2:51 PM	Absence Request Human Resources	SCHRUR, SAMUEL 05-0315 2014/09/29	4 weeks	10004043	[More] [Settings]

Inbox Summary Fields **Required** (max of 3)

These fields create the summary column within the default Inbox view

- Summary Column Fields**
- Name of TA
 - Name of Faculty Course Supervisor
 - Course Number
 - Semester
 - Year

Optional Settings: Routing & Editing Options

- For optional settings, we have provided the most common selections. If you believe you have a specific circumstance, please contact the Workflow inbox for more help.
 - Routing Options: Ad-hoc approvers allows for collaboration, and is typically selected on most Workflow forms
 - Editing Options: Most forms only require editing of submitted data by approvers through the Workflow API

Routing Options Optional

- Add Approvers (Ad-hoc)** Allow approvers to add other approvers during routing (Ad-hoc Approvers)
 Restrict ad-hoc approvers to active employees only

- Auto Signatures** Allow Auto-Signatures (approvers don't need to sign the same package multiple times)

- Routing Restarts** Allow routing to restart after routing is complete

- Return a Package** Allow approvers to return a package to the initiator New

Editing Options Optional

- Package Edit Options** Allow editing of submitted data by Approvers
 Allow editing of submitted data by Initiators
 Allow editing of submitted data through the Workflow API
-
- Allow Approvers to edit data after they have signed
 Allow edits to occur after the package has completed routing

Optional Settings: Voiding & Notification Options, Help Desk Tools

- Voiding Options: Allow packages to be voided, even after they have completed routing, for optimal routing experience
- Notification Options: Select the notification/email frequency that best suits your form
- Help Desk Tools: All the Help Desk Tools allow for the most flexibility when managing form responses and routing

Voiding Options Optional

- Package Void Options**
- Allow packages to be voided
 - Allow the initiator to void packages
 - Allow voids after packages have completed routing

Notification Options Optional

- Notification When Routing Complete**
- Email the form owner(s) when each package completes routing
 - Email the initiator when their package completes routing
 - Email approvers when each package completes routing

Help Desk Tools Optional

- Remove From Workflow** Enable the 'Remove from Workflow' Help Desk Tool
- Unvoid a Package** Enable the 'Unvoid a Package' Help Desk Tool
- Return to Workflow** Enable the 'Return to Workflow' Help Desk Tool
- Restart Routing** Enable the 'Restart Routing' Help Desk Tool
- Return to Initiator** Enable the 'Return to Initiator' Help Desk Tool New

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, Reports, Tools, Settings, and Help. The 'Forms' menu item is currently selected. 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 '+ Add New Stop' button in the modal is also circled in red, with red arrows pointing from the main interface button to the modal button.

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

	Name	Person Type	Classification
<input type="button" value="Select"/>	Am...renner, John	Student	Student - College of Education
<input type="button" value="Select"/>	...renbrenner, Julie A	Faculty/Staff	Nurse Clinician
<input type="button" value="Select"/>	Jaschen, Adam R	Faculty/Staff	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.

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

1 Processing + Add New Destination

Stop Conditions

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

1 Processing + Add New Destination

Stop Conditions

Route to this stop if All of the following conditions are met

Are you a CS major? Yes (Yes) is selected

+ Add New Stop Condition

Update Conditions Cancel

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' Remove

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).

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)

Test/Prod 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 & Production Deployment](#) help article.

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

- 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)

Close Duplicate Delete

Field Type **Read-Only Supporting Text Field**

H1 H2 H3 B I [Link Icon] [List Icon] * [Menu Icon]

The advisor will receive this form in workflow two times in succession. The first time, you are reviewing/approving 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 [\[cs-info@list.uiowa.edu\]\(http://mailto:cs-info@list.uiowa.edu\)](mailto:cs-info@list.uiowa.edu)

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

Brackets Parenthesis

Proposal Defense Results

Move Duplicate Delete

The advisor will receive this form in workflow two times in succession. The first time, you are reviewing/approving 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

Is Proposal Defense Complete? No Yes Optional

Proposal Defense Date Optional

IOWA

Any Questions?

Please Contact:
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Katie Michalski
Katherine-Michalski@uiowa.edu

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