Five Components of Creating a Workflow

Name Form & Create Link

Customize the Form Fields

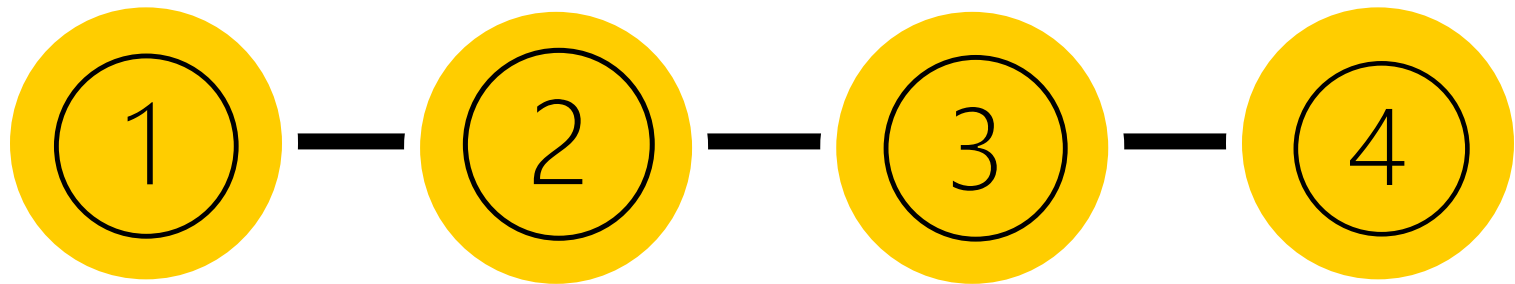Adjust Form Settings

The Five Components

Route Editing

Publish in Test/Production

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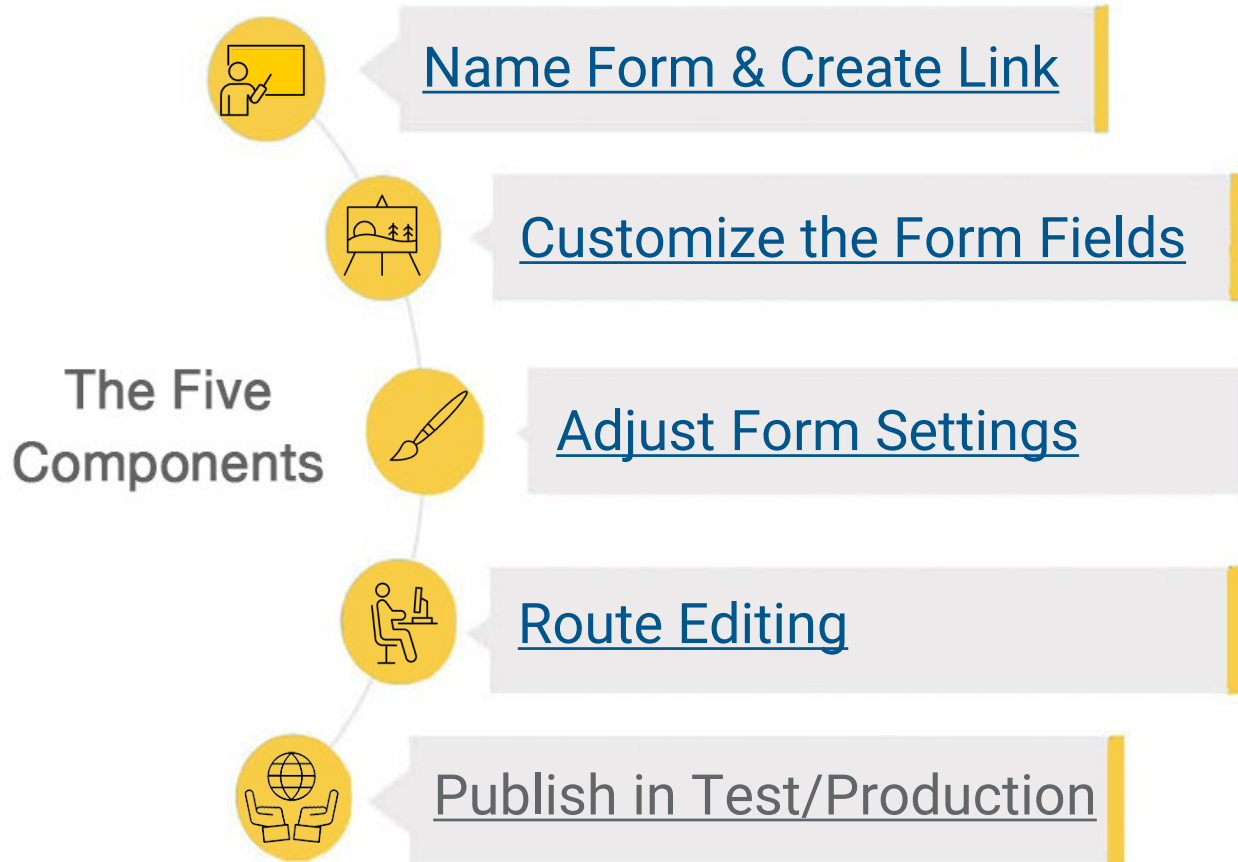
Creating a Form

Naming and Creating a Customizable Link

Name and Create Form

Steps to Creating a Form

1 — **2** — **3** — **4**
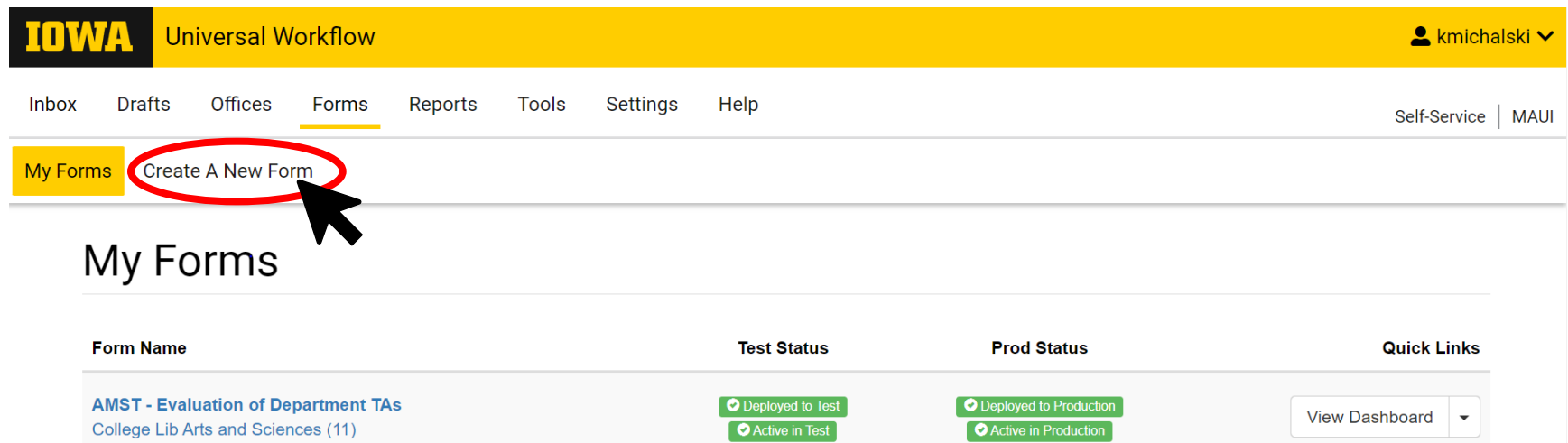
Begin a New Form

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.

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

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

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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.

Form Builder

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

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
❶ 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

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

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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.

Choices

Choice List Type	◉ Static Choice List
	○ Predefined Choice List
	○ Dynamic Choice List

Other Option   ☑ Show an 'Other' Choice

☑ First Choice | 1st
☐ Second Choic | 2nd
☐ Third Choice | 3rd
☐ 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)

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

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

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

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.

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."

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

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

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"

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.

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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)

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 &

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)

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?

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