

## Self-Help Guide

# Jadu Connect: Set Up Workflows for Jadu Central Forms

This self-help guide takes you through the process of setting up workflows for Jadu Central forms. It covers the process of gathering the required information, creating the case in Jadu Connect, and then connecting your Jadu Central form using the Jadu Connect Workflow.

## Getting Started

### Is Jadu Connect Right for You?

#### What is Jadu Connect?

What is Jadu Connect?

</services-technologies/how-tos/jadu-connect-what-jadu-connect>

Jadu Connect (workflow) is used in conjunction with Jadu Central (forms) to create and manage form routing and approvals. Jadu Connect utilizes a business engine - the workflow functionality is created using business rules and logic.

Overview of Jadu Central and Jadu Connect Functionality

</services-technologies/how-tos/jadu-overview-jadu-central-jadu-connect>

View a grid which outlines some of the featured functionality offered in Jadu Central and Jadu Connect to help you decide if you need Jadu Central only or both Jadu Central and Jadu Connect.

### Learn About Access and Support

## **Access Jadu Connect**

New User: I need both Jadu Central and Jadu Connect

</services-technologies/how-tos/jadu-new-user-i-need-both-xfp-cxm>

Existing Jadu Central User: I need to add Jadu Connect

</services-technologies/how-tos/jadu-existing-xfp-user-i-need-add-cxm>

Login to Case Building Environment to View Submitted Cases

<https://z.umn.edu/JaduCaseBuilder>

Use your Test Jadu Connect username and password. If you are trying to build your case, use the URL provided to you by a Jadu team member.

Login to Production to View Submitted Cases

<https://z.umn.edu/JaduCaseProduction>

Use your Production Jadu Connect username and password.

## **Get Help**

Attend a Working Lab

<https://calendar.google.com/calendar/selfsched?sstoken=UUxyQW5jUFhVUzk2fGRlZmF1...>

A time to ask questions and to work on your own project. Members of the Jadu support team are available for one-on-one help.

Technology Help

</contact-technology-help>

To get help with Jadu Connect contact Technology Help at 612-301-4357 or [help@umn.edu](mailto:help@umn.edu).

## **Understanding and Planning**

### **Map Your Business Process**

Identify Your Business Process

</services-technologies/how-tos/jadu-connect-map-your-business-process>

Your unit will need to map its business process for each workflow in Jadu Connect you desire to create. Creating your process map at the beginning informs the creation and documentation of your Jadu Connect workflow.

LucidChart: What is Process Mapping

<https://www.lucidchart.com/pages/process-mapping>

## Create Your Workbook

While not required, it is strongly suggested you follow these steps and build out a Workbook. Doing so helps you the overall process and speeds up the configuration of your CXM Workflow.

Workbook

[https://docs.google.com/spreadsheets/d/1hfzsxBZJ38UgENVh\\_PnerhLli6\\_lq1U\\_evTzdVN...](https://docs.google.com/spreadsheets/d/1hfzsxBZJ38UgENVh_PnerhLli6_lq1U_evTzdVN...)

This workbook was put together by the Jadu team to help organize thoughts and assist in the process to create your workflow.

Identify the Statuses

</services-technologies/how-tos/jadu-connect-identify-statuses-workbook>

Identify the Transitions (Actions)

</services-technologies/how-tos/jadu-connect-identify-transitions>

Define your Jadu Connect Emails (optional)

</services-technologies/how-tos/jadu-connect-define-emails-workbook>

Define your Rules (optional)

</services-technologies/how-tos/jadu-connect-define-rules-workbook>

Identify Jadu Central fields that need to be retained and put into Jadu Connect

</services-technologies/how-tos/jadu-connect-identify-jadu-central>

Map Jadu Central Form Process

</services-technologies/how-tos/jadu-connect-map-your-business-process>

## Configure a Jadu Connect Workflow

### Set Up Case Type In Jadu Connect

#### Request Case Type and Fields

Fill out Request Form

<https://z.umn.edu/CXMsetupRequest>

#### Building your Case Type in Jadu Connect

Create Statuses

</services-technologies/how-tos/jadu-connect-create-statuses>

Create Transitions

</services-technologies/how-tos/jadu-connect-create-transitions>

Create Emails

</services-technologies/how-tos/jadu-connect-create-emails>

Add Fields to Jadu Connect Forms

</services-technologies/how-tos/jadu-connect-add-fields-form>

Create Rules

</services-technologies/how-tos/jadu-connect-create-rules>

Global Jadu Connect Fields

</services-technologies/how-tos/jadu-connect-global-jadu-connect-fields>

## **Set up Jadu Central Forms to work with Jadu Connect**

### **Open Jadu Connect Case**

The first form submission from XFP will open a case and send an email with URL to the next form.

Task 1. Create a Jadu Connect Case from a Jadu Central Submission

</services-technologies/how-tos/jadu-connect-create-case-jadu-central>

Task 2. Send an Email with a URL to the Next Form

</services-technologies/how-tos/jadu-connect-send-email-url-next-form>

Task 3. Verify the Case Creation

</services-technologies/how-tos/jadu-connect-verify-case-creation-task-3>

### **Update Jadu Connect Case**

Each subsequent form can pull in data from the CXM case, update data in the case, and transition the case to a new status.

Task 4. Connect Jadu Central Form to Jadu Connect Case

</services-technologies/how-tos/jadu-connect-connect-your-jadu-central>

Task 5. Pull Case Data into a Subsequent Form

</services-technologies/how-tos/jadu-connect-pull-case-data-subsequent>

Task 6. Update Case with Data from a Subsequent Form

</services-technologies/how-tos/jadu-connect-update-case-data-subsequent>

Task 7. Transition Case to "Normal" Status

</services-technologies/how-tos/jadu-connect-transition-case-normal>

Task 8. Verify the Case Updates

</services-technologies/how-tos/jadu-connect-verify-case-updates-task-8>

## **Close Jadu Connect Case**

All CXM cases must reach a final status at the end of the process. No cases should be left open indefinitely.

Task 9. Transition Case to "Final" Status

</services-technologies/how-tos/jadu-connect-transition-case-final>

# **Advanced Features and Data**

## **Additional Workflow Options**

### **Basic Functionality**

Add Attachments to Your Case

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Send Reminder Emails

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Auto-Close or Auto-cancel Case

</services-technologies/how-tos/jadu-connect-auto-close-or-auto-cancel>

### **Advanced Functionality**

Add Notes

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Re-opening a Case

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Using a Single Jadu Central Form in Multiple Case Steps

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Allow Submitter to Update an Existing Jadu Central Form

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## **Approval Methods**

Linear (Sequential) - Defined Approver

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Only one approval is requested at a time

Non-Linear - Multiple Approvers - All Required

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Multiple approvals are requested at a particular status and all responses are required in order to proceed.

Non-Linear - Multiple Approvers - Some Required

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Multiple approvals are requested at a particular status but only 1 is required in order to proceed.

## **Export and View Data**

### **Form Builder Options for Exporting Data**

How to Send to Perceptive Content

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Sending attachments to Perceptive Content/Jadu Connect

[/jadu-content-placeholder](#)

Exporting Case Data to CSV

[/services-technologies/how-tos/jadu-connect-exporting-case-data-csv](#)

### **Data from Submitted Cases**

View and Filter Case List

[/services-technologies/how-tos/jadu-connect-view-filter-cases](#)

Case Overview

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