

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-jadu-central>

Existing Jadu Central User: I need to add Jadu Connect

</services-technologies/how-tos/jadu-existing-jadu-central-user-i-need>

Login to Jadu Connect with your UMN Credentials

<https://it.umn.edu/services-technologies/how-tos/jadu-connect-sign-in-your-umn-...>

Sign in Links

<https://it.umn.edu/services-technologies/jadu-forms>

Get Help

Attend a Working Lab

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

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.

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...

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

Open your case type in Jadu Connect

</services-technologies/how-tos/jadu-open-case-type>

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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Coming soon

Send Reminder Emails

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Coming soon

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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Coming soon

Re-opening a Case

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Coming soon

Using a Single Jadu Central Form in Multiple Case Steps

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Coming soon

Allow Submitter to Update an Existing Jadu Central Form

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Coming soon

Approval Methods

Linear (Sequential) - Defined Approver

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Coming soon. Only one approval is requested at a time

Non-Linear - Multiple Approvers - All Required

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Coming soon. 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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Coming soon. 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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Coming soon

Sending attachments to Perceptive Content/Jadu Connect

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Coming soon

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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Coming soon

Dashboard

Overview of Jadu Dashboard

Overview of Jadu Dashboard Features

</services-technologies/how-tos/jadu-dashboard-overview-dashboard>

Understanding Homepages

</services-technologies/how-tos/jadu-dashboard-understand-homepages>

Case Filter Best Practices

</services-technologies/how-tos/jadu-dashboard-case-filter-best>

Configure a Dashboard

Set up Filters in Jadu Connect

</services-technologies/how-tos/jadu-dashboard-set-filters-in-jadu>

Create a Dashboard Homepage

</services-technologies/how-tos/jadu-dashboard-create-dashboard-homepage>

Configure the UMN Case List Widget

</services-technologies/how-tos/jadu-dashboard-configure-umn-case-list>

Publish a Dashboard

Publish a Dashboard Homepage

</services-technologies/how-tos/jadu-dashboard-publish-dashboard>

Understanding and Configuring Case Visibility

Understanding Case Visibility

</services-technologies/how-tos/jadu-dashboard-understanding-case>

Configure Case Visibility through Assignment

</services-technologies/how-tos/jadu-dashboard-configure-case-visibility>

Team Queues

How to View & Manually Update Current Assigned Users

</services-technologies/how-tos/jadu-dashboard-view-manually-update>

Work with Team Queues and Use the Take Responsibility Feature

</services-technologies/how-tos/jadu-dashboard-work-team-queues-use-take>

Advanced

(Advanced) Working with Multiple Dashboards

</services-technologies/how-tos/jadu-dashboard-working-multiple>