University of Minnesota

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_PnerhLIi6_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-working-case-forms
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
/jadu-content-placeholder
Coming soon
Send Reminder Emails
/jadu-content-placeholder
Coming soon
Auto-Close or Auto-cancel Case
/services-technologies/how-tos/jadu-connect-auto-close-or-auto-cancel

Advanced Functionality

Add Notes
/jadu-content-placeholder
Coming soon
Re-opening a Case
/jadu-content-placeholder
Coming soon
Using a Single Jadu Central Form in Multiple Case Steps
/jadu-content-placeholder

Coming soon
Allow Submitter to Update an Existing Jadu Central Form
/jadu-content-placeholder
Coming soon

Approval Methods

Linear (Sequential) - Defined Approver
/jadu-content-placeholder
Coming soon. Only one approval is requested at a time
Non-Linear - Multiple Approvers - All Required
/jadu-content-placeholder
Coming soon. Multiple approvals are requested at a particular status and all responses are required in order to proceeed.
Non-Linear - Multiple Approvers - Some Required
/jadu-content-placeholder
Coming soon. Mutiple 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
/jadu-content-placeholder
Coming soon
Sending attachments to Perceptive Content/Jadu Connect
/jadu-content-placeholder
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
/jadu-content-placeholder

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