

Self-Help Guide

Jadu CXM: Set Up Workflows for XFP Forms

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

Getting Started

Is CXM Right for You?

What is CXM

What is CXM?

[/jadu-cxm-what-cxm](#)

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

Overview of XFP and CXM Functionality

[/jadu-overview-xfp-cxm-functionality](#)

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

Learn About Access and Support

Access Jadu CXM

New User: I need both XFP and CXM

[/jadu-new-user-i-need-both-xfp-cxm](#)

Existing XFP User: I need to add CXM

[/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 CXM 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 CXM 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 CXM contact Technology Help at 612-301-4357 or help@umn.edu.

Understanding and Planning

Map Your Business Process

Identify Your Business Process

[/jadu-cxm-map-your-business-process](#)

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

[/jadu-cxm-identify-statuses-workbook](#)

Identify the Transitions (Actions)

[/jadu-cxm-identify-transitions-workbook](#)

Define your CXM Emails (optional)

[/jadu-cxm-define-cxm-emails-workbook](#)

Define your Rules (optional)

[/jadu-cxm-define-rules-workbook](#)

Identify XFP fields that need to be retained and put into CXM

[/jadu-cxm-identify-xfp-fields-retain-put](#)

Map Jadu Form Process

[/jadu-cxm-map-jadu-form-process](#)

Configure a CXM Workflow

Set Up Case Type In CXM

Request Case Type and Fields

Fill out Request Form

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

Building your Case Type in CXM

Create Statuses

[/jadu-cxm-create-statuses](#)

Create Transitions

[/jadu-cxm-create-transitions](#)

Create Emails

[/jadu-cxm-create-emails](#)

Add Fields to CXM Forms

[/jadu-cxm-add-fields-cxm-forms](#)

Create Rules

[/jadu-cxm-create-rules](#)

Global CXM Fields

[/jadu-cxm-global-cxm-fields](#)

Set up XFP Forms to work with CXM

Open CXM 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 CXM Case from an XFP Submission

[/jadu-cxm-create-cxm-case-xfp-submission](#)

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

[/jadu-cxm-send-email-url-next-form-task-2](#)

Task 3. Verify the Case Creation

[/jadu-cxm-verify-case-creation-task-3](#)

Update CXM 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 XFP Form to CXM Case

[/jadu-cxm-connect-your-xfp-form-your-cxm](#)

Task 5. Pull CXM Case Data into a Subsequent Form

[/jadu-cxm-pull-cxm-case-data-subsequent](#)

Task 6. Update CXM Case with Data from a Subsequent Form

[/jadu-cxm-update-cxm-case-data-subsequent](#)

Task 7. Transition CXM Case to "Normal" Status

[/jadu-cxm-transition-cxm-case-normal](#)

Task 8. Verify the Case Updates

[/jadu-cxm-verify-case-updates-task-8](#)

Close CXM 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 CXM Case to "Final" Status

[/jadu-cxm-transition-cxm-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-cxm-auto-close-or-auto-cancel-case](#)

Advanced Functionality

Add Notes

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Re-opening a Case

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Using a Single XFP Form in Multiple Case Steps

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Allow Submitter to Update an Existing XFP 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/CXM

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Exporting Case Data to CSV

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

Data from Submitted Cases

View and Filter Case List

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

Case Overview

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