University of Minnesota

Self-Help Guide

WorkflowGen: Create Workflows and Forms

There are several steps involved in developing web-based forms with defined business process pathways using WorkflowGen. These include identifying the process, process participants, and process data, plus designing the webform that will be viewable by "actors" and "requesters."

We recommend that before moving an existing process to WorkflowGen, departments should complete a full business analysis to ensure the process makes sense and is efficient.

Create the Process

Access the System

Request Access

Request Department Implementation
/services-technologies/how-tos/workflowgen-request-department

Understand the System

Understand How the System Is Set Up
/services-technologies/how-tos/workflowgen-understand-how-system-set

Create a Workflow and Form

Create a Workflow

Create a New Process
/services-technologies/how-tos/workflowgen-create-new-process
Set Up Participants
/services-technologies/how-tos/workflowgen-set-participants

Set Up the Process Form

Create a Form
/services-technologies/how-tos/workflowgen-create-form

Manage the Workflow

Work with the Workflow

Add Actions and Conditions

Add an Action to the Workflow
/services-technologies/how-tos/workflowgen-add-action-workflow
You can also work with conditions by adding a couple more actions to the workflow: Manager Approval and CFO Approval.

Store Data and Set Up an Approval Step

See parameters and processes sections in the WorkflowGen 6.6.0 Administration Module Reference Guide.

WorkflowGen 6.6.0 Administration Module Reference Guide
http://docs.workflowgen.com/v66/admin/en/Content/WorkflowGen-Adm-6-6-en/Workflo…

Communicate with Users

Create Email Templates

Create Email Templates
/services-technologies/how-tos/workflowgen-create-email-templates

Manage Users and Groups

Use Grouper

Work with Instances

Understand How Grouper Manages User Access
/services-technologies/how-tos/workflowgen-understand-how-grouper
Migrate Between Instances
/services-technologies/how-tos/workflowgen-migrate-between-instances

Work with Folders

Create Folders
/services-technologies/how-tos/grouper-create-folders
Manage Folder Permissions
/services-technologies/how-tos/grouper-manage-folder-permissions

Work with Groups

Grouper Self-Help Guide
/services-technologies/self-help-guides/grouper-create-manage-groups