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

Existing XFP User: I need to 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?ssstoken=UUxyQW5jUFhVUzk2fGRIZmF1...

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_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  
/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
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

Advanced Features and Data

Additional Workflow Options

Basic Functionality

Add Attachments to Your Case
Add Notes

Send Reminder Emails
Re-opening a Case

Auto-Close or Auto-cancel Case
Using a Single XFP Form in Multiple Case Steps

Advanced Functionality

Allow Submitter to Update an Existing XFP Form

Approval Methods

Linear (Sequential) - Defined Approver
Only one approval is requested at a time
Non-Linear - Multiple Approvers - All Required

Multiple approvals are requested at a particular status and all responses are required in order to proceed.
Non-Linear - Multiple Approvers - Some Required

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

Sending attachments to Perceptive Content/CXM

Exporting Case Data to XML/CSV

**Data from Submitted Cases**

View and Filter Case List

Case Overview