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?

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

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
/service-technologies/how-tos/jadu-new-user-i-need-both-jadu-central

Existing Jadu Central User: I need to add Jadu Connect
/service-technologies/how-tos/jadu-existing-jadu-central-user-i-need

Login to Case Building Environment to View Submitted Cases
https://z.umn.edu/JaduCaseBuilder

Use your Test Jadu Connect 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 Connect username and password.

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
/service-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/1hfzxsxBZJ38UGVv5hPnerhLii6_lq1U_evTzdVNa...

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

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
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

Advanced Features and Data

Additional Workflow Options

Basic Functionality

Add Attachments to Your Case

Add Notes

Advanced Functionality

Re-opening a Case

Using a Single Jadu Central Form in Multiple Case Steps
Approval Methods

Linear (Sequential) - Defined Approver
Coming soon. Only one approval is requested at a time
Non-Linear - Multiple Approvers - All Required
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
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
Coming soon
Sending attachments to Perceptive Content/Jadu Connect
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