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-xfp-cxm
Existing Jadu Central User: I need to add Jadu Connect
/services-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://calendar.google.com/calendar/selfsched?ssstoken=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 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

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
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
Send Reminder Emails
/jadu-content-placeholder
Auto-Close or Auto-cancel Case
/services-technologies/how-tos/jadu-connect-auto-close-or-auto-cancel

Advanced Functionality

Add Notes
/jadu-content-placeholder
Re-opening a Case
/jadu-content-placeholder
Using a Single Jadu Central Form in Multiple Case Steps
/jadu-content-placeholder
Allow Submitter to Update an Existing Jadu Central Form
/jadu-content-placeholder
Approval Methods

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