

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

Create Groups

</services-technologies/how-tos/grouper-create-groups>

Administer Groups

</services-technologies/how-tos/grouper-administer-groups>

Copy a Group from Branch to Branch

</services-technologies/how-tos/grouper-copy-group-branch-branch>