Linked Steps in a Flow

Many work flows often involve a number of people filling out different sections of a single form. So when you're designing this type of flow, you're most likely dragging the same form into the flow designer repeatedly to create the different steps in the flow.

Another way to create this type of flow is to use the Linked Steps feature of the flow designer. In this method, you create a linked version of a form for each step you want in your flow. One great advantage of this method is that if you need to make changes to the form step(s) after you've created your flow, you only have to edit the "parent" form — the editing changes are automatically propagated to its linked forms in the flow. Conversely, if you drag multiple copies of the same form into a flow to create steps, you'd have to make any changes to each copy of the form in each step.

If you want to show or hide different parts of a form depending on which user is filling it out, you can easily do this in a flow designed with linked steps using the Security tab or Business Rules.

One circumstance in which you might not want to use linked forms is a flow in which each user is filling out a different form.

1. To create linked forms in a flow, add a step to the flow by dragging a form into the flow designer.
2. Click on the step and then click
   Link icon to create a linked form.
3. Continue clicking
   Link icon to create as many of the linked forms as you want.

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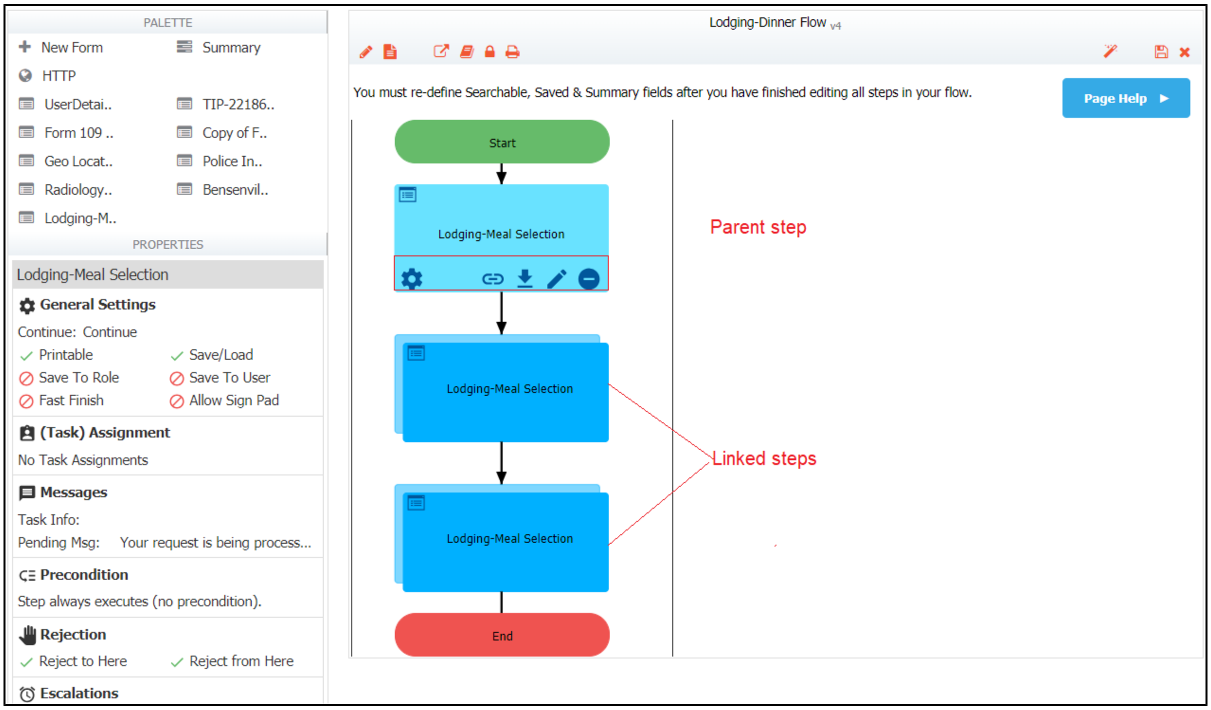
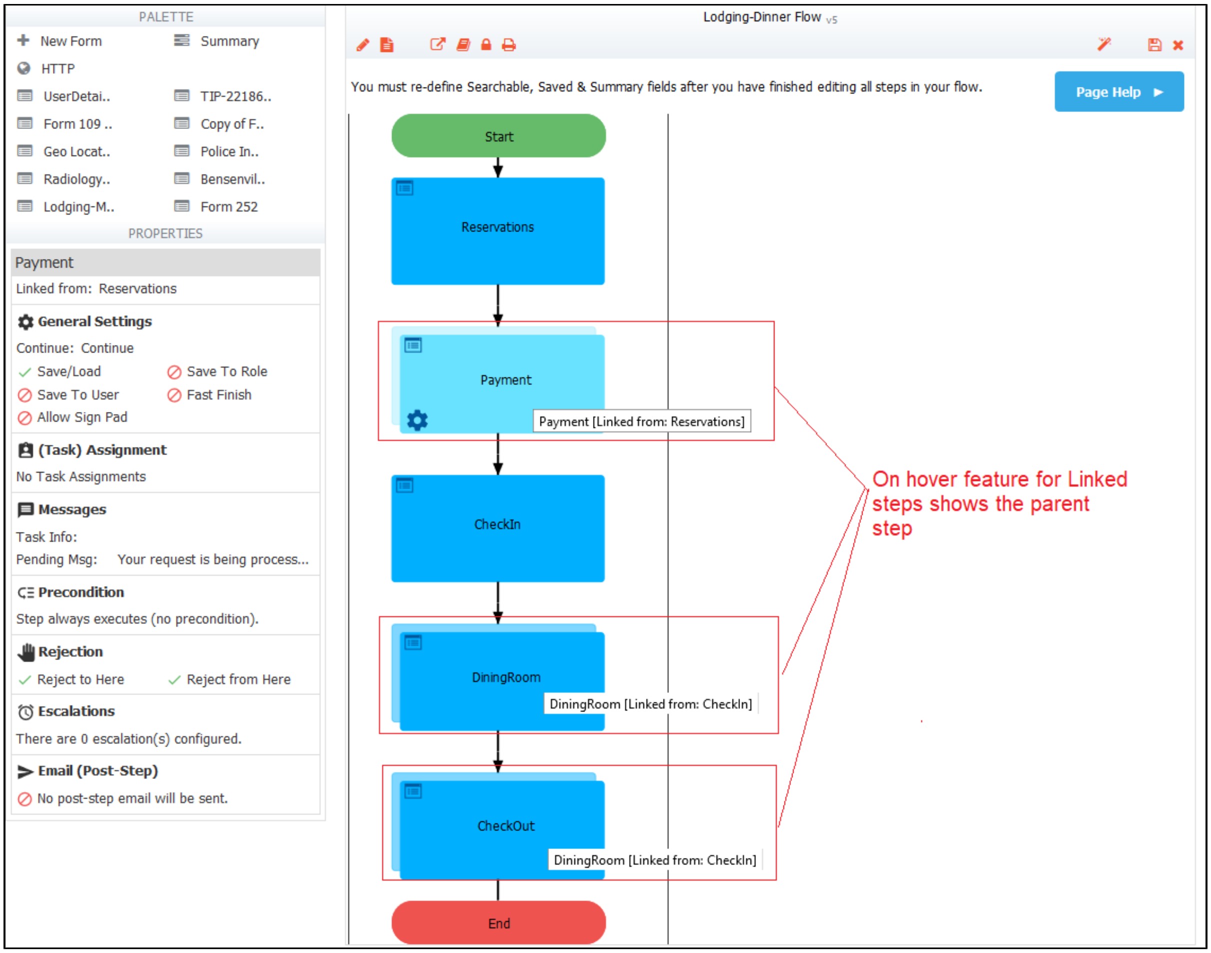
The example below shows the parent *Lodging-Meal Selections* form and its two linked forms. Notice that the parent form and its linked forms initially all have the same name, but the linked forms are represented by a double box. Remember, a linked step is a copy of the parent form. Note also that the parent step shows five icons while the linked steps display only the !80bluedeleteRemove icon.

- Click the
  Link Icon to create a linked step.
- Click the
  pencil icon to open a step in the Form Designer to edit it.
- Click the
  delete icon to remove a linked step.
- Click the
  download icon on the parent step as a standalone form.
- Click the
  Edit Step Properties to access the Property tabs for the flow step.



Finding the Name of the Parent Step

Hovering over the flow step name on a linked step shows the name of the Parent form it was copied from. This is useful when you have a flow with more than one step that has additional linked steps.



Linked Steps Workflow Examples

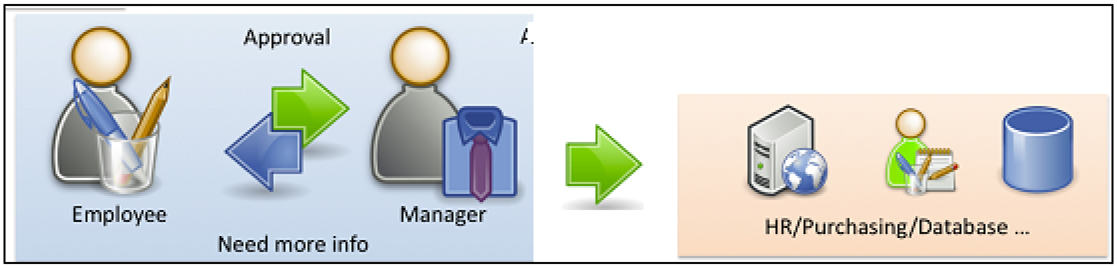
Approval workflows lend themselves to a Flow Design pattern that uses Linked Steps. You can route your steps via the Security tab or Business Rules. Either way, if flow steps require modification, changes made to the parent form propagate to the linked steps. In general, the steps to create an Approval Workflow with Linked steps are:

1. Create the workflow in the Flow Designer.
2. Drag a New Form or a form from your Forms library into the flow as the first step.
3. Edit Step 1 by accessing the Forms Designer inside of the Flow Designer.
4. Add Sections in Step 1 for the subsequent steps. Save the flow step.
5. Click the

Link icon on Step 1 to create linked steps for the additional steps in the flow. Save the flow.
6. Edit Step 1 in the flow and use the Visual Rule Builder to write Business Rules to show the sections in Step 1 when the flow is routed to the associated step i.e. show the Manager section on the Manager step, show the Finance section on the Finance step.
7. Save and test the workflow.

Continue reading for more details.

Example 1 - Linked Steps using Business Rules



Consider an Expense Report with 3 steps:

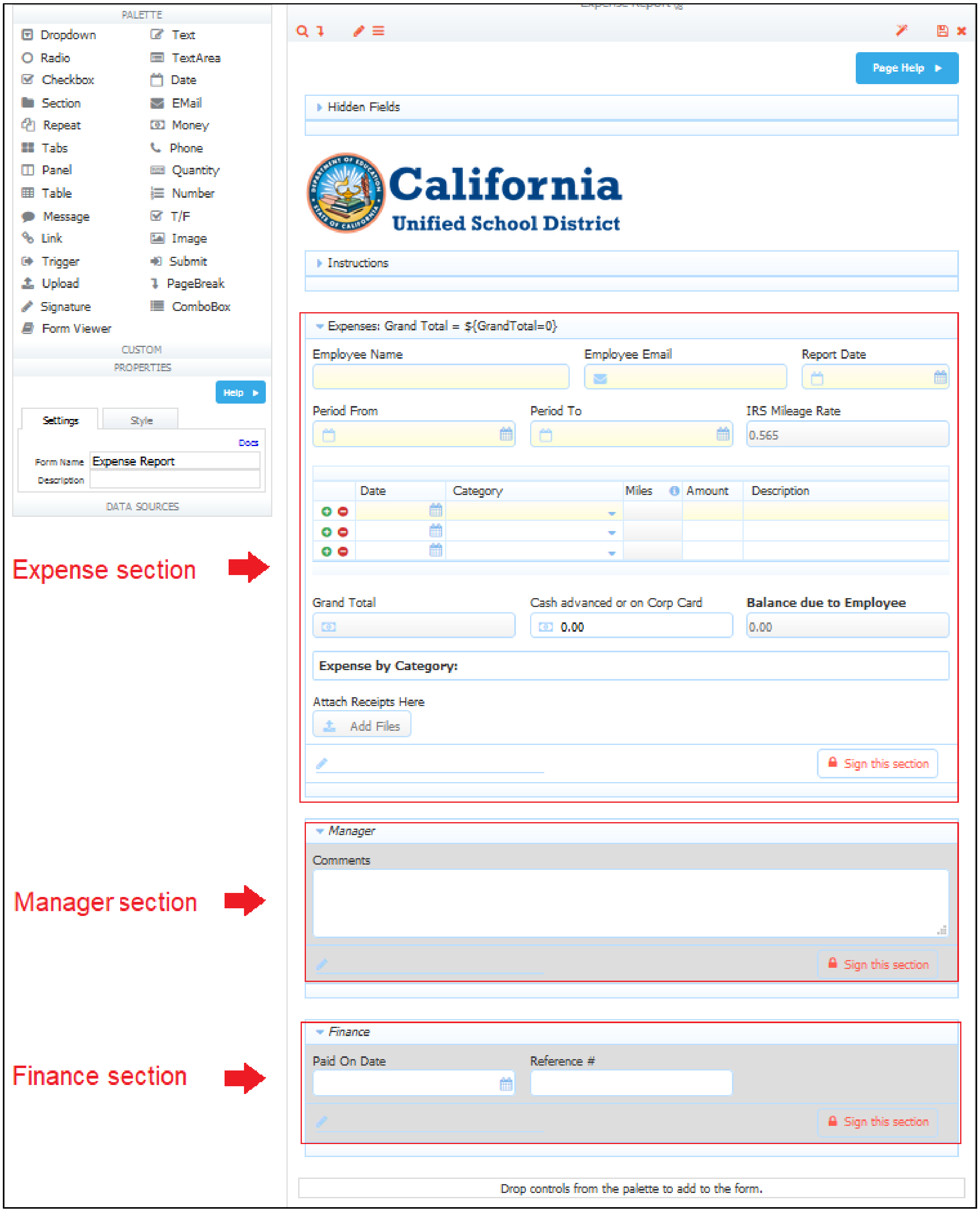
- Step 1 is filled in by an employee
- Step 2 is approved/rejected by a Manager
- Step 3 goes to the Finance department for final processing.

Drag a New Form step onto the flow canvas. Click on it.

Click the

Edit icon to open the Forms Designer.

Create Sections in the first step of the flow for the Expenses, Manager and Finance. Design the sections using any of the Palette Controls. Minimally, you can use a table to collect the Expenses and a Signature control for the employee to sign in the Expense section, a TextArea contro l and a Signature in the Manager section and a Paid on Date and Reference Number field with a Signature on the Finance step. Save Step 1.



Click on Step 1. Open the **Settings tab** in one of 3 ways:

- Click the  Edit Step Properties icon on the step then click the **Settings** tab.
- Click the icon in the Properties Navigator on the left side of the screen. This takes you directly to the **Settings** tab.
- Click anywhere in the **General Settings** section of the Properties Navigator. This takes you directly to the **Settings** tab.
- Type the name of the flow step in the Name field on the **Settings** tab. For this example, the name of the first step is Employee. Click **Sub mit**.

Click the  Link icon twice to create linked steps for the Manager and Finance steps. The linked steps are copies of Step 1. Note they are represented by a double box in the Flow Designer.

Click on the second step.

Open the **Settings tab** in one of 3 ways:

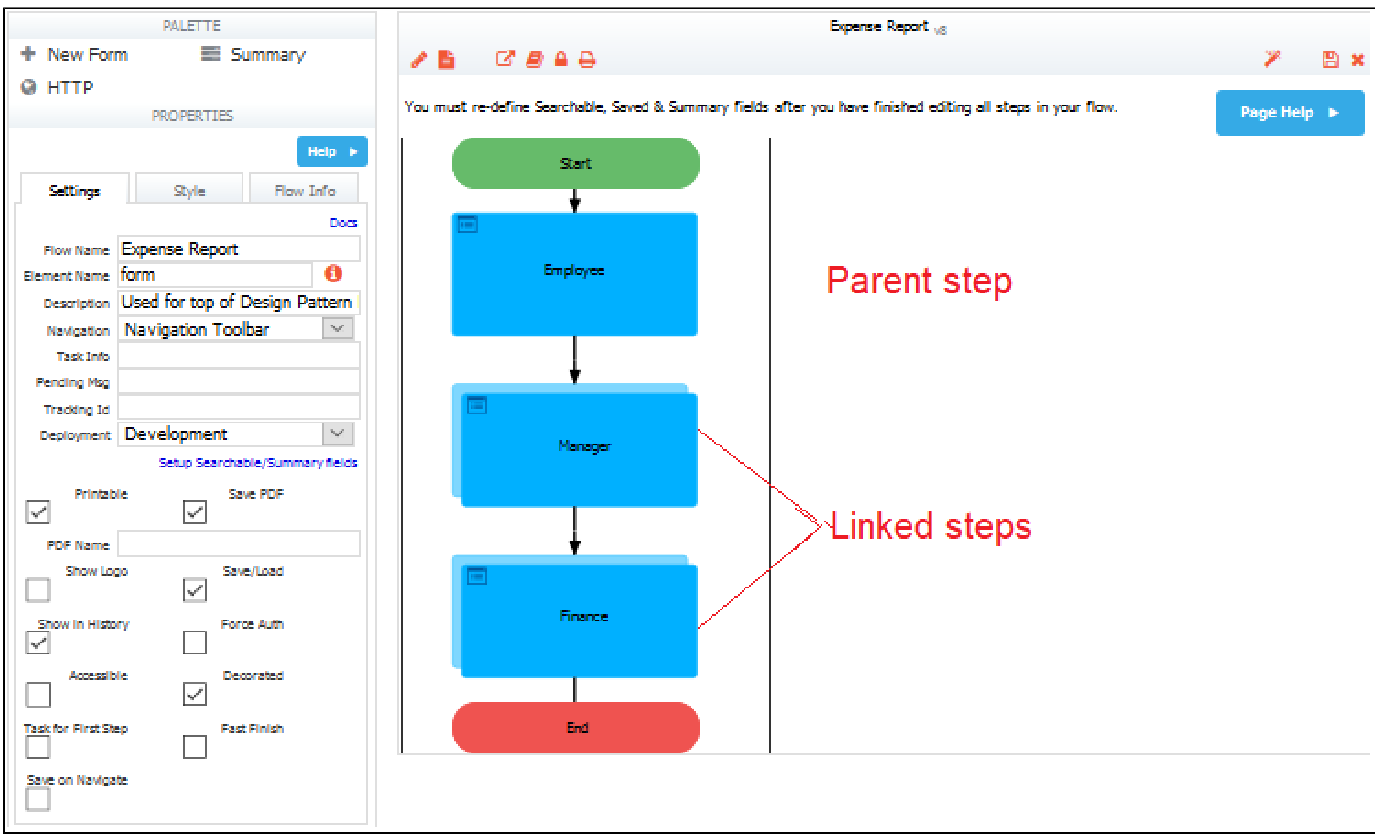
- Click the
  Edit Step Properties icon on the step then click the **Settings** tab.
- Click the icon in the Properties Navigator on the left side of the screen. This takes you directly to the **Settings** tab.
- Click anywhere in the **General Settings** section of the Properties Navigator. This takes you directly to the **Settings** tab.
- Type the name of the flow step in the Name field on the **Settings** tab. For this example, the name of the second step is Manager.
- Click on the Assignment tab. Add the Manager role to the **Assign to Role** field. You can begin typing the role name in the field to filter the dropdown choices. Click **Submit**.

Click on the third step.

Open the **Settings tab** in one of 3 ways:

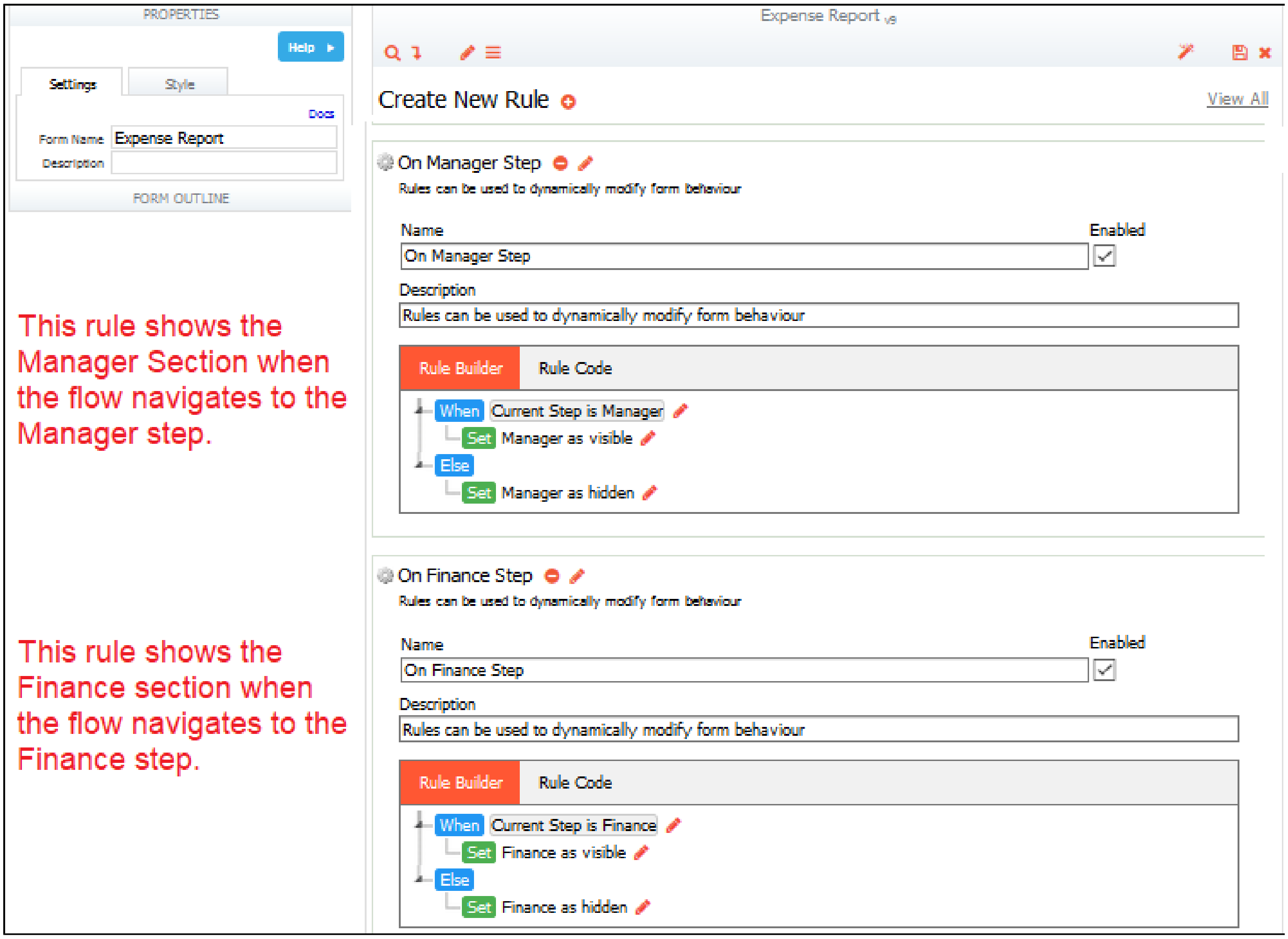
- Click the
  Edit Step Properties icon on the step then click the **Settings** tab.
- Click the icon in the Properties Navigator on the left side of the screen. This takes you directly to the **Settings** tab.
- Click anywhere in the **General Settings** section of the Properties Navigator. This takes you directly to the **Settings** tab.
- Type the name of the flow step in the Name field on the **Settings** tab. For this example, the name of the third step is Finance.
- Click on the Assignment tab. Add the Finance role to the **Assign to Role** field. You can begin typing the role name in the field to filter the dropdown choices. Click **Submit**.

Save the workflow.



Edit Step 1 of the workflow. Click the

Rules icon on the Form toolbar. Write the Show/Hide rules and any other Business Rules you might need.

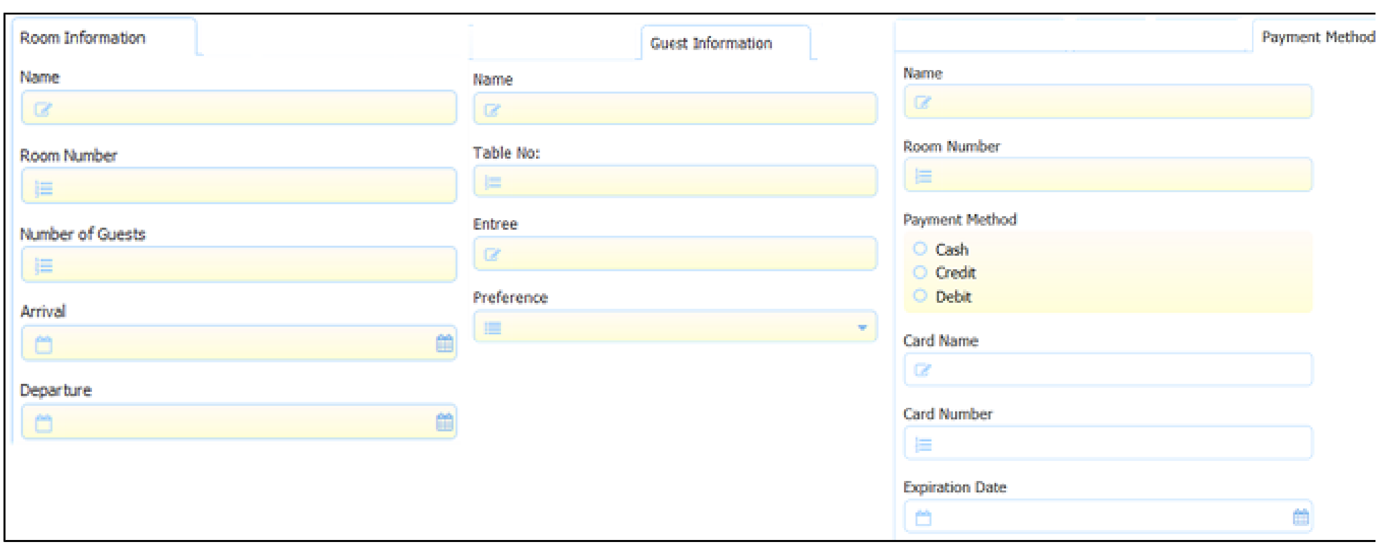


Save and test the flow.

Example 2 - Linked Steps using the Security Tab

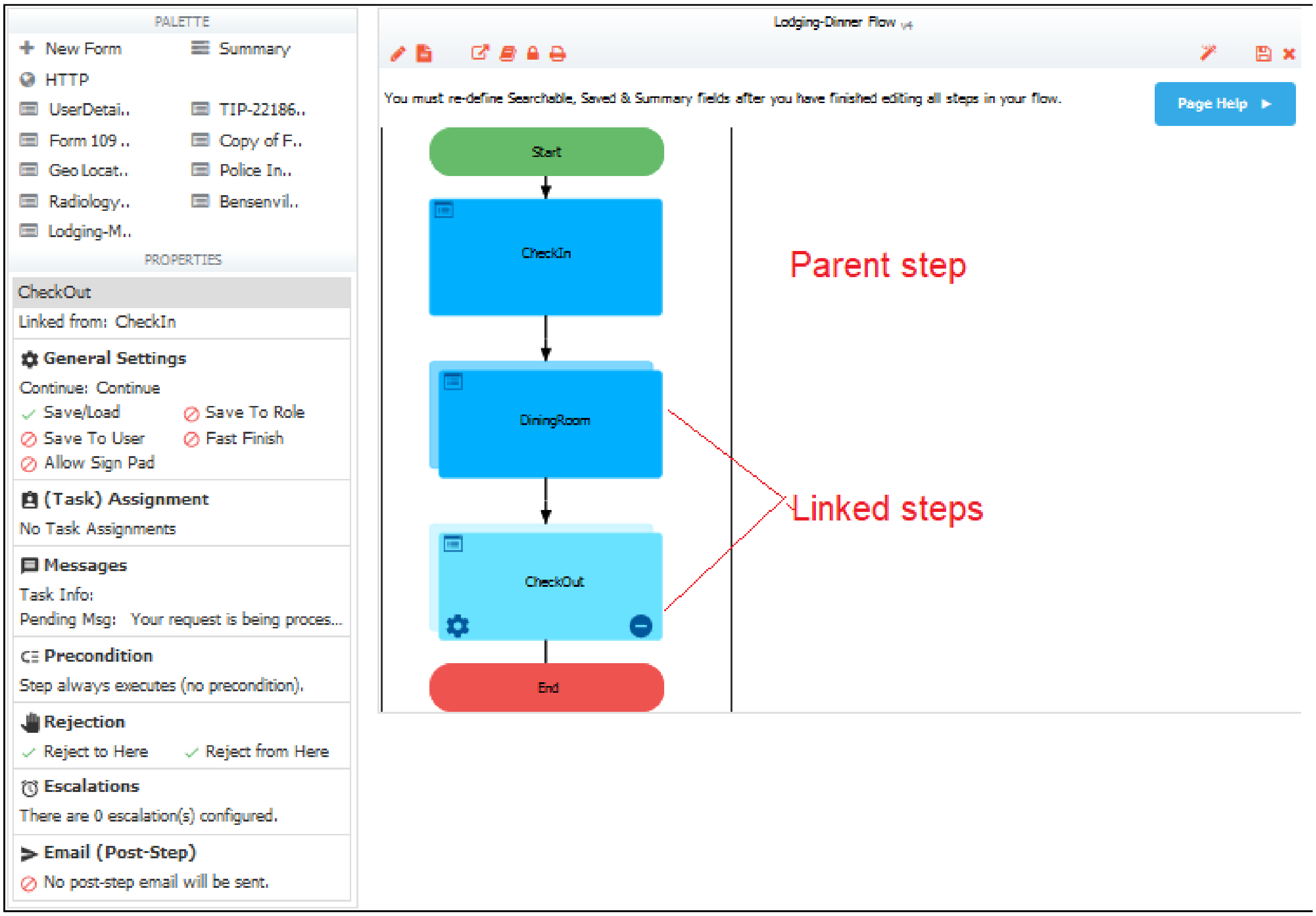
The parent step in this example is a form that contains a Tab control consisting of three tabs: Room Information, Guest Information and Payment Method.

Because the parent forms and its linked forms represent steps, you'll want to give them unique names. The parent form in this example has three tabs used for hotel check in, dinner selection, and hotel check out.



To rename the parent step and its linked steps:

- Click on a workflow step
- Open the **Settings tab** in one of 3 ways:
  - Click the
    Edit Step Properties icon on the step then click the **Settings** tab.
  - Click the icon in the Properties Navigator on the left side of the screen. This takes you directly to the **Settings** tab.
  - Click anywhere in the **General Settings** section of the Properties Navigator. This takes you directly to the **Settings** tab.
  - Type the name of the flow step in the Name field on the **Settings** tab.



As with other forms you use to create steps, you can assign a linked-form step to a Role,so that the step is performed by someone with that role, or even by a specific user. In this example, we rename all three steps and assign each to a different role.

- **CheckIn** is assigned to the *Reservations* role.
- **DiningRoom** is assigned to the *MaitreDHotel* role.
- **CheckOut** is assigned to the *Billing* role.

> Th Reservations, MaitreDHotel and billing roles must exist in your tenant. Create 3 users and assign one role to each of them.

Click on a workflow step

Open the **Assignment tab** in one of 3 ways:

- Click the
  Edit Step Properties icon on the step then click the **Assignment** tab.
- Click the icon in the Properties Navigator on the left side of the screen. This takes you directly to the **Assignment** tab.
- Click anywhere in the **Task Assignment** section in the Properties Navigator. This takes you directly to the **Assignment** tab.
- Add the role name to the **Assign to Role** field. You can begin typing the role name in the field to filter the dropdown choices. Click **Subm it**. For this example, add the Reservation role to the CheckIn step, the MaitreDHotel role to the DiningRoom step and the Billing role to

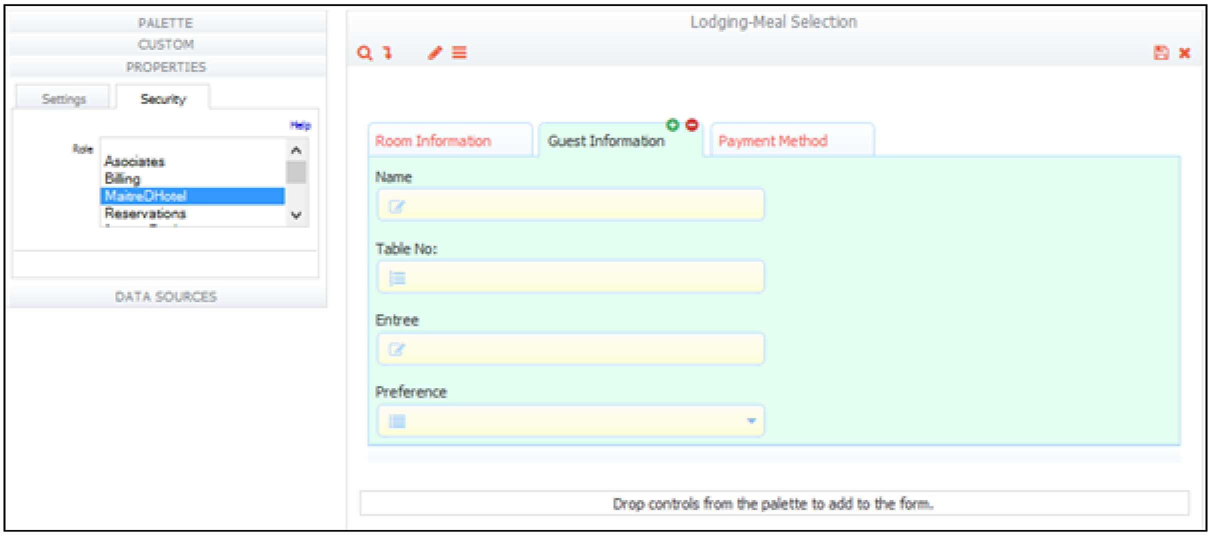
the Checkout step.

You may also want only certain sections of the form to be visible in an specific step so that only users in a certain role see those sections. For example, in this flow, perhaps only the dining room staff needs to see the form's Guest Information tab.

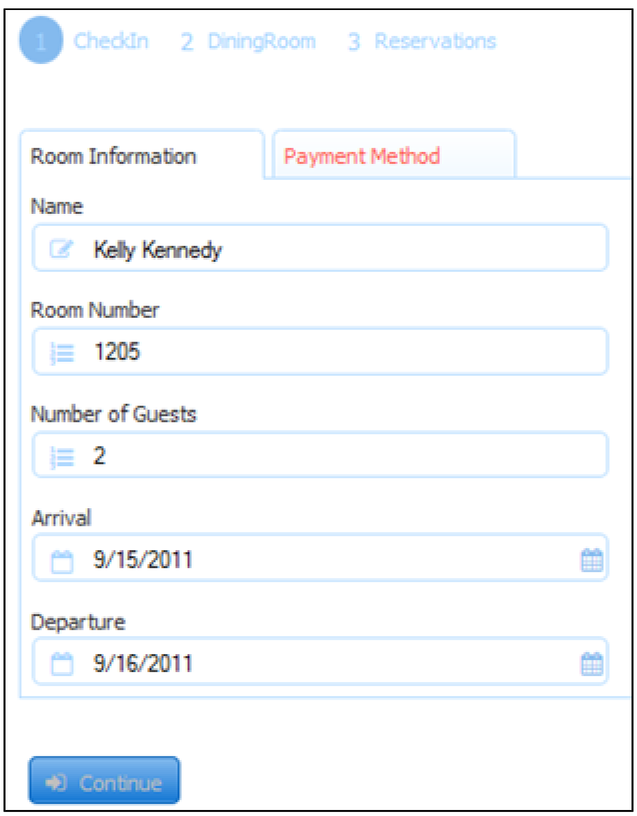
To do this, you can edit the the form via the Flow Designer and use the Security Tab in the Forms Designer to assign a role to sections of the form. Click the form, and then click

Edit icon to open the form in the Form Designer.

In this example, we assign the *Guest Information* tab to the *MaitreDHotel* role.

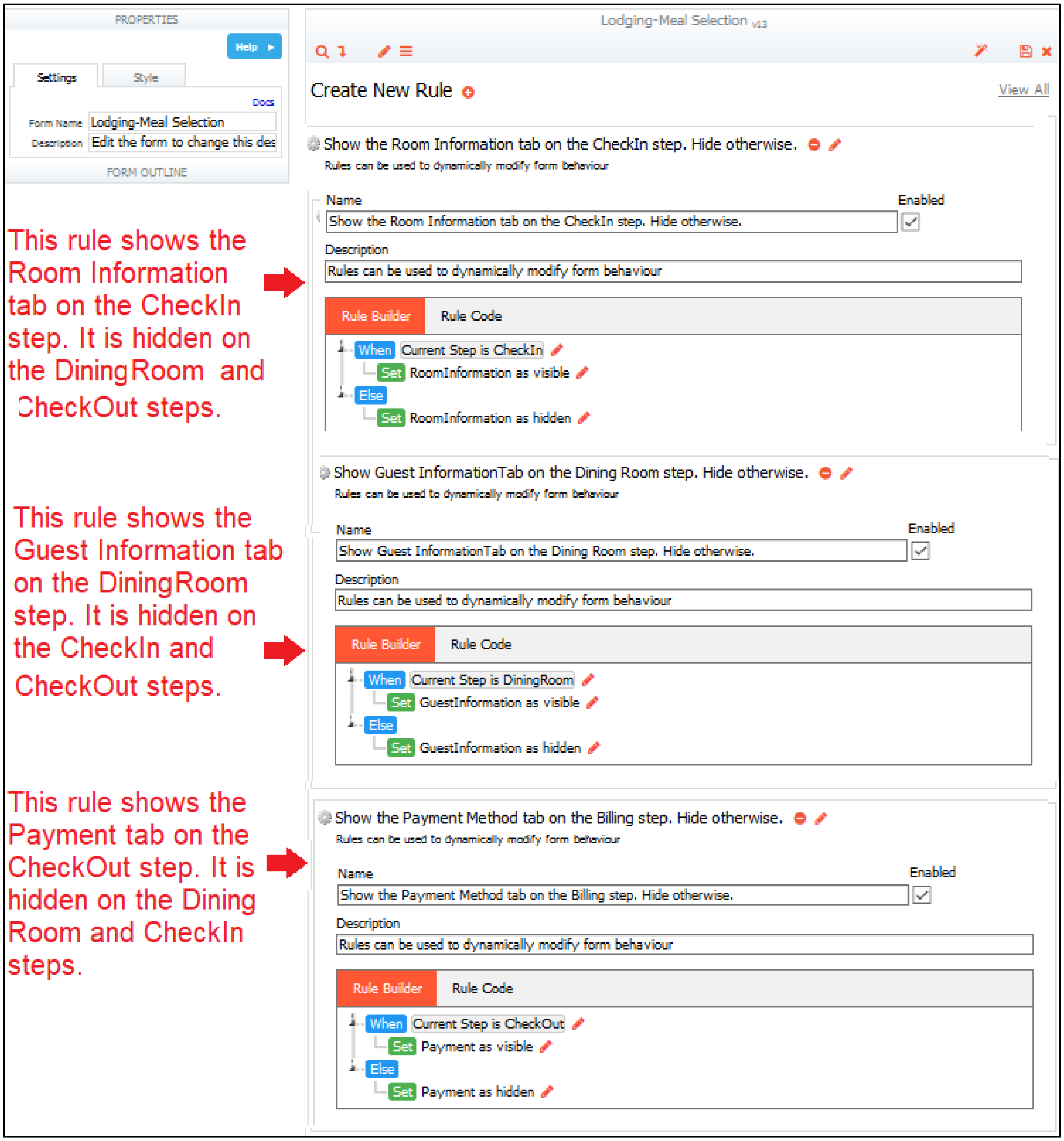


When the flow runs, the first step, *CheckIn*, is performed by a user with the *Reservations* role, so that user does not see the form's Guest Information tab, which is only visible to a user with the *MaitreDHotel* role.



The next step in the flow, *DiningRoom*, is assigned to the *MaitreDHotel* role, so that user sees the Guest Information tab. The third step is assigned to the Billing role so the user sees the Payment Method tab.

You can also use rules to show or hide parts of a form in a step. For example you could write a Business Rule using the Visual Rule Builder to show the Guest Information tab only when a MaitreDHotel role is using the form.



Linked Forms and the Submissions PDF

If you check the Save PDF property on the flow properties panel, a PDF image of the flow is saved in the Live Forms' submission repository. It is no longer necessary to uncheck the printable property for all but one of the steps to prevent the form from being printed more than once in the default pdf. This was required in previous versions of Live Forms. Refer to the Printable property for more information.