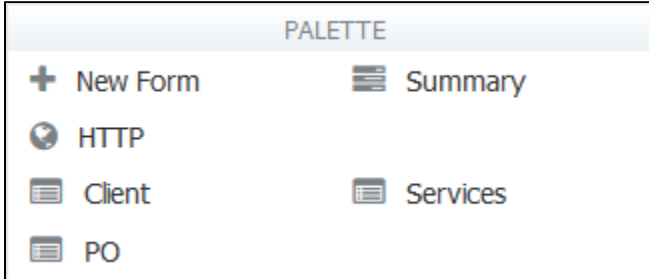


Adding Steps to a Flow

Workflow steps are one of four types:

- Form(s) that you created in the Form Designer
- New Form
- Summary
- HTTP
- Linked Steps in a Flow - this is a special type of step used most often for Approval workflows. Click the link for a detailed discussion.

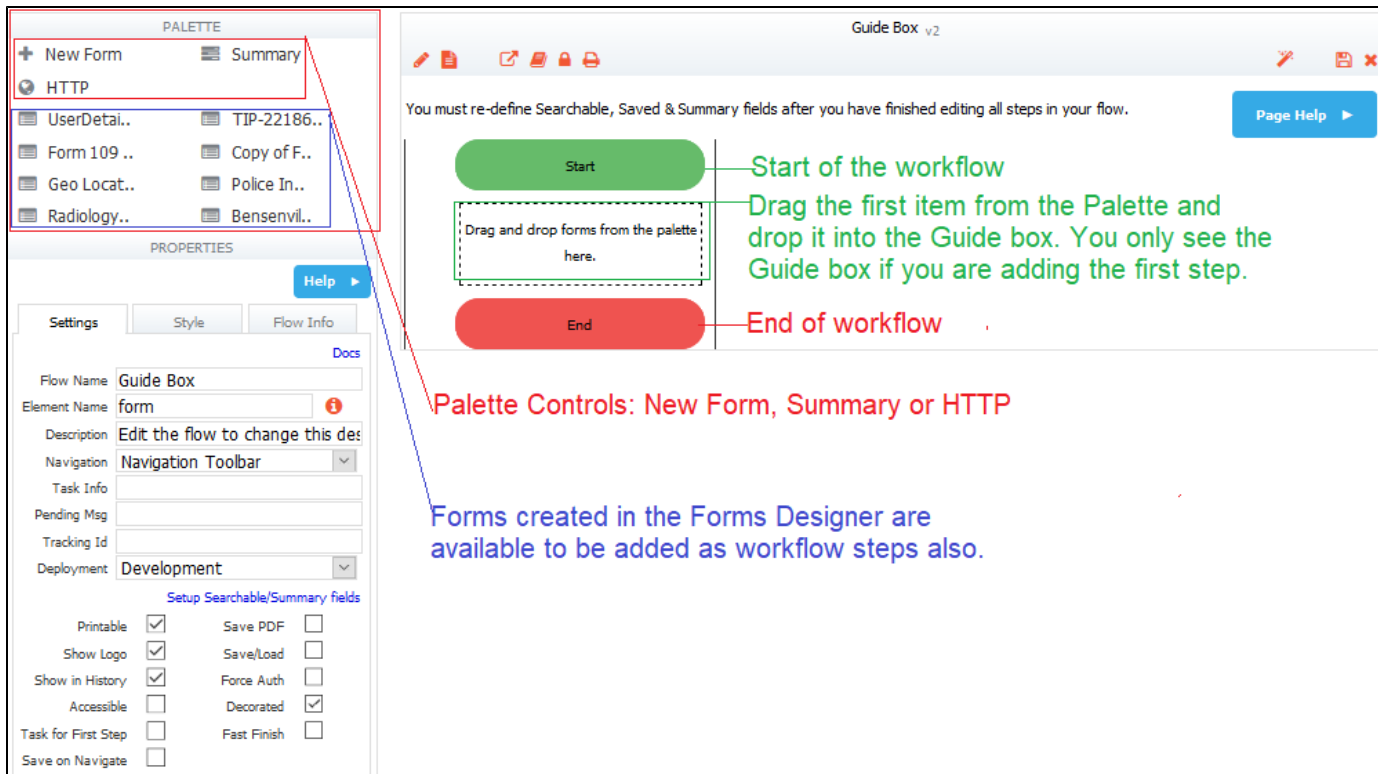


On This Page:

- Adding the First Step to a Workflow
- Adding or Moving Workflow Steps

Adding the First Step to a Workflow

Drag a New Form, Existing Form, Summary or HTTP step from the Palette and drop them into the flow work area. If you are adding the first step of a workflow, drag the step from the Palette and drop it in the guide box. You will only see the guide box when adding the first step.

A screenshot of the Flow Designer interface. On the left is the "PALETTE" with options: "New Form", "HTTP", "UserDetail..", "Form 109 ..", "Geo Locat..", "Radiology..", "Summary", "TIP-22186..", "Copy of F..", "Police In..", and "Bensenvil..". Below the palette is the "PROPERTIES" panel for a flow named "Guide Box". It includes fields for "Flow Name", "Element Name", "Description", "Navigation", "Task Info", "Pending Msg", "Tracking Id", and "Deployment". There are also checkboxes for "Printable", "Show Logo", "Show in History", "Accessible", "Task for First Step", "Save on Navigate", "Save PDF", "Save/Load", "Force Auth", "Decorated", and "Fast Finish". On the right is the "Guide Box v2" canvas. It contains a green "Start" button, a dashed box with the text "Drag and drop forms from the palette here.", and a red "End" button. A "Page Help" button is in the top right. Red and blue annotations with arrows point to the palette and properties panels.

- The Flow Designer canvas displays the flow in a flow chart like format. The arrows are drawn automatically as the step is dropped on the canvas. This graphical rendering clearly emphasizes the process and flow routing and makes the designer more intuitive.
- Adding a pre-condition in the Precondition tab, automatically represents it as a decision box (yellow diamond). The precondition is part of the step that follows it. Clicking on the



Precondition cog icon in the yellow diamond is one way to go directly to the Precondition tab for editing.

PALETTE

+ New Form Summary

HTTP

PROPERTIES

Supervisor

General Settings

Continue: Continue

✓ Printable ✓ Save/Load

⊗ Save To Role ⊗ Save To User

⊗ Fast Finish ⊗ Allow Sign Pad

(Task) Assignment

No Task Assignments

Messages

Task Info:

Pending Msg: Your request is being proce...

Precondition

Step executes only if precondition is true.

Precondition:

Logic: GrandTotal is equal or more than 10000

Rejection

✓ Reject to Here ✓ Reject from Here

Escalations

There are 0 escalation(s) configured.

Email (Post-Step)

⊗ No post-step email will be sent.

Expense Report v2

You must re-define Searchable, Saved & Summary fields after you have finished editing all steps in your flow.

Page Help ▶

```

graph TD
    Start([Start]) --> Employee[Employee]
    Employee --> Reviewer[Reviewer]
    Reviewer --> Precondition{GrandTotal is equal or more than 10000}
    Precondition -- Yes --> Supervisor[Supervisor]
    Precondition -- No --> Accounting[Accounting]
    Supervisor --> Accounting
    Accounting --> End([End])
    
```

In this workflow, the Supervisor step is only performed if the Grand total is equal to or greater than \$10000.00. The Precondition that was added is represented by the yellow diamond. If the condition is true, the Supervisor step is performed. If the condition is false, the Supervisor step is skipped. These actions are represented by the Yes/No options and black arrows automatically drawn between the yellow diamond and the Supervisor step when the Precondition was added. The flow routing becomes immediately clear.

If the following properties are selected in your form, they will be unchanged when you drag and drop this form into a flow as one of the steps:

Settings:

- Save/Load
- Task Info
- Allow Sign Pad
- Printable

Style:

- Orientation

Adding or Moving Workflow Steps

Help to determine the drop target is provided when dragging and dropping new steps from the Palette or moving existing steps. As you move a step over existing ones, the step that is the drop target will show a flashing green "bulls eye"



to indicate the exact place where the step is to be placed. You cannot drop between a step and its precondition diamond.

PALETTE
PROPERTIES

HTTP Post to Finance

General Settings
URL: http://<server:port>/services/testyanf/

Email (Post-Step)
No post-step email will be sent.

Guide Box v3

You must re-define Searchable, Saved & Summary fields after you have finished editing all steps in your flow.

Page Help

Start

Bensenville Loan Applicati...

New Form
HTTP Post to Finance

flashing green "bull's eye"

When adding or moving steps:

- Look for the flashing green "bull's eye" when adding or moving steps. When you see it, drop the step and it will be placed in the intended position.