How-to Articles: Workflows

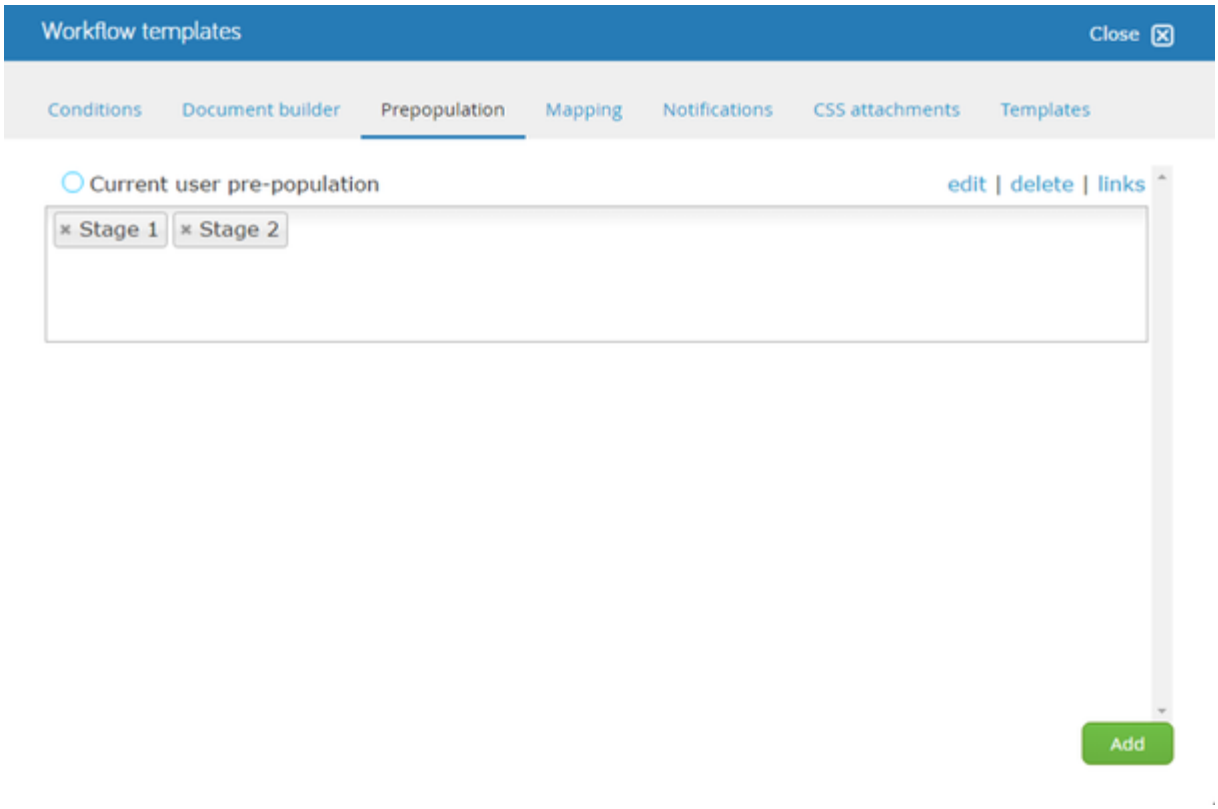
Dashboard	Forms	Workflows
• Cancelling a Request • Cancelling e-Signatures • Cancelling a Signature • Viewing Related Documents • Removing a Workflow • How do I know what is assigned to me? • How do I access TAP from my email? • Editing a Request • Reassigning a Workflow	• Working with Formulas • Setting Global Styles • Setting Styles for Form Fields	• How do I use Workflow Templates? • Setting Conditions for a Stage • Adding Attachments to a Workflow Stage • Configuring Notifications • Text Tagging in Microsoft Word Documents • How do I segment a long form into short, click-through sections? • Documentation Tagging • Setting Conditions for a Relationship • Form Prepopulation • Form Mapping • Salesforce Support • E-Signature Support for Relationships • Form Access • Configuring a Child Workflow

How do I use Workflow Templates?

Centrally store templates for workflow configurations: Conditions, Document Builder, Pre-population, Mapping, Notifications, CSS Attachments. For example, you may create a set of prepopulation rules that you wish to apply to multiple stages in your workflow. Simply create a template, and bulk apply to any stage or relationship. If the template requires a change, modify it in one central location and the entire workflow will update.

Create a workflow template:

1. Navigate to Workflow options -> Workflow templates
2. Choose a template category from the top menu and click ‘Add’ in the bottom right
3. Create a new template
4. Click ‘links’ and use the multi-select to add the link to any stage or relationship



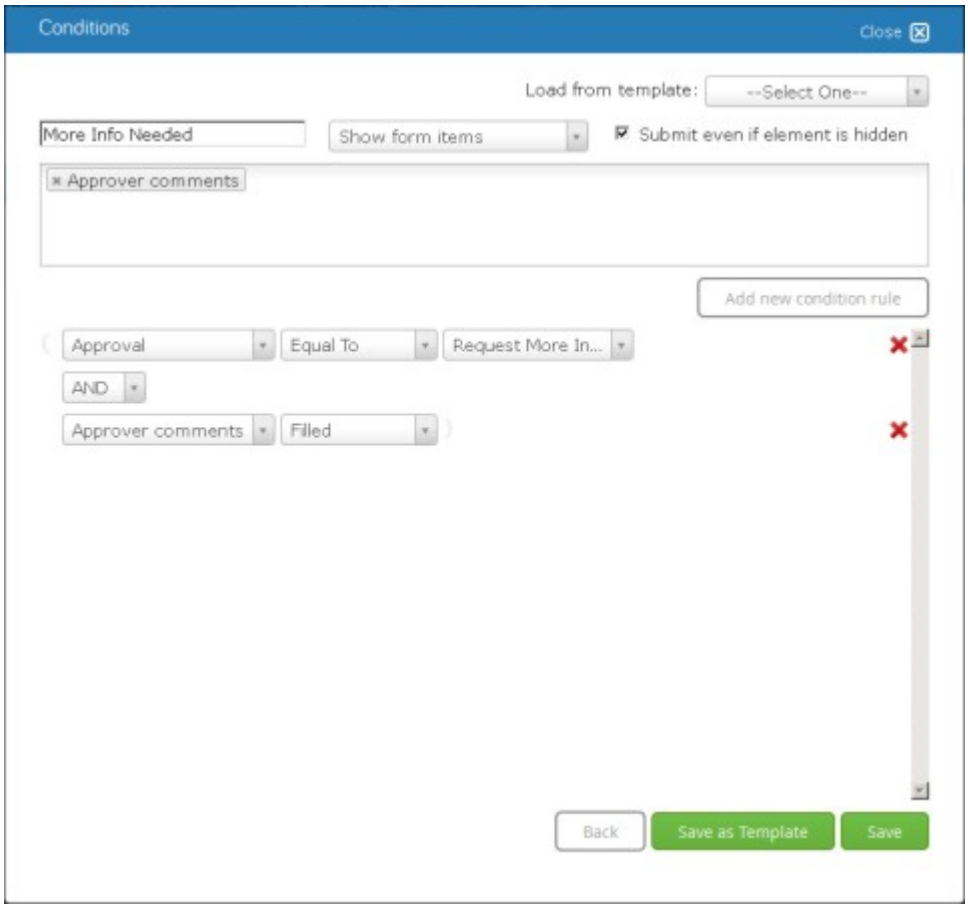
Related articles

- E-Signature Support for Relationships
- Text Tagging in Microsoft Word Documents
- Form Access
- How do I segment a long form into short, click-through sections?

Setting Conditions for a Stage

The **Conditions** property lets you specify rules that determine whether or not a form field is displayed for a given workflow stage based on the status of *one or more* other form fields. You can configure form access for multiple contained in a form, on a *field-by-field* basis. If desired, you can specify and combine multiple rules for given condition using Boolean logic.

To configure a condition:



1. Select the workflow stage for which you wish to configure a condition.
2. Click the

Conditions button in the Workflow Page toolbar.

- The Conditions dialog displays.
- The drop-down menu lists *all fields* contained in the associated workflow form.

3. Select the field for which you wish to specify a condition, then click the **Add** button.
   - The Conditions dialog refreshes to display the **Add new rule** options.

4. If desired, select a template for the form map from the **Load from template** menu.
   - The **Load from template** menu lists *all* condition templates saved for the active workflow. If no templates are associated with the active workflow, the **Load from template** menu *is not* displayed.

5. Enter a name for the condition in the upper text box.

6. Use the drop-down menu to specify if the condition will be used to **Show form items** or to **Hide form items**.

7. Select the **Submit even if element is hidden** check box to allow the form to be submitted in cases where the selected field is hidden.

8. Select the form items to be shown or hidden (as specified in step **6** above):
   - Click the form items text box.
     - A menu displays listing all form fields included in the workflow form *except* the field for which the condition is being created.
   - Select the desired form field.
     - The selected form field is added to the form items text box.
   - Repeat as needed to add *additional* form fields.
     - To remove a form field from the form items text box, click the **X** icon for the desired field.

9. Click the **Add new condition rule** button to specify the condition under which the selected field will be shown/hidden.
   - The Conditions dialog refreshes to display the "select field" menu.
   - The drop-down menu lists all fields contained in the associated workflow form *except* the field for which the condition is being created.

10. Select the field on which you wish to base the condition.
    - The Conditions dialog refreshes to display the "matching criteria" menu.

11. Select the desired matching criteria for the associated field:
    - **Equal to** - field content is equal to the value specified
    - **Not equal to** - field content is not equal to the value specified
    - **Contains** - the condition will be *valid* when the content of the form field *includes* the specified value *anywhere* in the field

- **Does not contain** - the condition will be *valid* when the content of the form field *does not include* the specified value *anywhere* in the field
- **Filled** - field contains content
- **Not filled** - field does not contain content

12. Specify the term against which the matching criteria will be applied.
    - Select the desired value from the drop-down menu, *or*, enter the desired value in the text box, as applicable.

      NOTE

      When a matching criteria of **Filled** or **Not filled** is selected, term options are not applicable.
13. To add another rule to the condition, click the **Add new condition rule** button.
    - The Conditions dialog refreshes to display a new "select field" menu.
    - Choose the Boolean operator to be applied between the rules.
      - Select **AND** if *both* rules must be met to satisfy the condition.
      - Select **OR** if *either* rule must be met to satisfy the condition.
      - Repeat steps **10** through **12** to specify the conditions for the new rule.
      - Repeat step **13** to add *additional* rules to the condition, as desired.
14. Click the **Save** button to save the condition.
    - The Conditions dialog refreshes to display the added condition.
15. Repeat steps **3** through **14** to add *additional* conditions to the currently selected workflow stage.
16. When all desired conditions have been added, click the **Close** button to close the Conditions dialog and return to the Workflow Page.

To save a condition template:

NOTE

Condition templates let you use a previously created condition rule as the basis for creating a *new* condition. Condition templates are "workflow-specific," and are available *only* for the workflow to which they were saved.

To save a condition template, create and save a condition as described above, then click the **Save as Template** button to save the current condition rule as a template. Once a template has been saved, it can be accessed and modified to create a *new* condition for *any stage* in the active workflow.

To edit a condition:

1. Select the workflow stage for which you wish to configure a condition.
   In the screen shown above, you can drag-and-drop conditions to rearrange the logic. You can do this *without* clicking edit.
2. Click the

   Conditions button in the Workflow Page toolbar.
3.
   - The Conditions dialog displays.
   - The dialog shows a list of all currently configured conditions for the workflow stage.
4. Click the **edit** link for the condition you wish to edit.
   - The Conditions dialog refreshes to display the current values for the selected condition.
5. Edit the values for the condition as desired.
   - To remove a rule for a condition, click the

     icon for the desired rule.
6. When all desired changes have been made, click the **Save** button.
   - The Conditions dialog returns to the conditions list.
7. Click the **Close** button to close the Conditions dialog and return to the Workflow Page.

To delete a condition:

1. Select the workflow stage for which you wish to configure a condition.
2. Click the

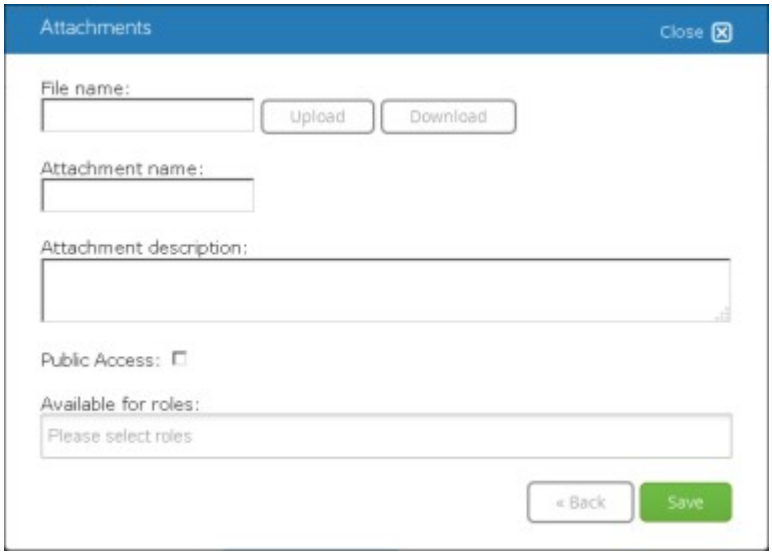
   

   Conditions button in the Workflow Page toolbar.
3.
   - The Conditions dialog displays.
   - The dialog shows a list of all currently configured conditions for the workflow stage.
4. Click the **delete** link for the condition you wish to delete.
   - The Conditions dialog refreshes with the selected condition removed from the list.
5. When all desired conditions have been deleted, click the **Close** button to close the Conditions dialog and return to the Workflow Page.

Adding Attachments to a Workflow Stage

The **Attachments** property lets you add attachments to or enter instructions for a given workflow stage. You can also download or delete previously added attachments.

To add an attachment to a workflow stage:



1. Select the workflow stage to which you wish to add an attachment.
2. Click the

   Attachments button in the Workflow Page toolbar.
   - The Attachments dialog displays. The dialog shows the **Attachments** page by default.
   - If attachments were previously added to the workflow stage, the dialog shows a list of attachments.
   - If no attachments have been added to the workflow stage, the attachment list is empty.

3. Click the **Add** button.
   - The dialog refreshes to display the attachment detail page.

4. Click the **Upload** button.
   - A standard File Upload dialog displays.

5. Locate and select the document you wish to upload, then click the **Open** button on the File Upload dialog.
   - The File Upload dialog closes automatically.
   - A status icon displays while the upload is in process.
   - When the upload has completed, the file name of the uploaded file is automatically entered in the **File name** and **Attachment name** text boxes.

6. If desired, you can edit the **Attachment name**.

   NOTE

   The **File name** is "read only," and cannot be edited.

7. Enter a description for the attachment in the **Attachment description** text box.

   NOTE

   You *must* include an **Attachment description** or the attachment *cannot* be saved to the workflow stage.

8. Specify the users that will have access to the attachment:
   - To make the attachment available to *all users*, select the **Public Access** check box.

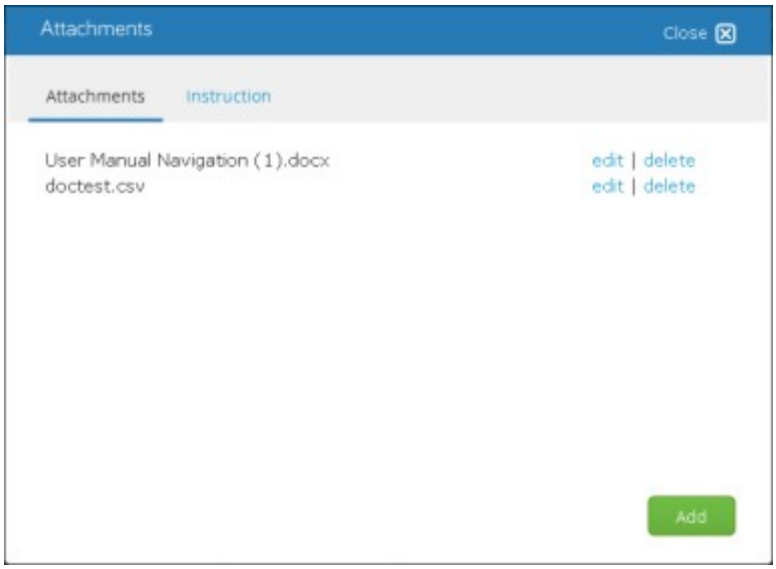
9. To limit access to users assigned to specific user roles, select *one or more* user roles from the **Available for roles** menu.

   NOTE

   You must either select the **Public Access** check box or select *at least one* user role from the **Available for roles** menu or the attachment *cannot* be saved to the workflow stage.

10. When all necessary information has been entered, click the **Save** button to save the attachment to the workflow stage.
    - The Attachments dialog refreshes with the new attachment added to the list.

To edit an attachment:



1. Select the workflow stage for which you wish to edit an attachment.
2. Click the

   Attachments button in the Workflow Page toolbar.
   - The Attachments dialog displays and shows a list of attachments for the workflow stage.
3. From the attachments list, click the **edit** link for the desired attachment.
   - The attachment detail page displays the current values for the attachment.
4. Edit the **Attachment name** and **Attachment description** and/or modify attachment access, as desired.
5. When all desired changes have been made, click the **Save** button to save your changes.
   - The attachments list displays.

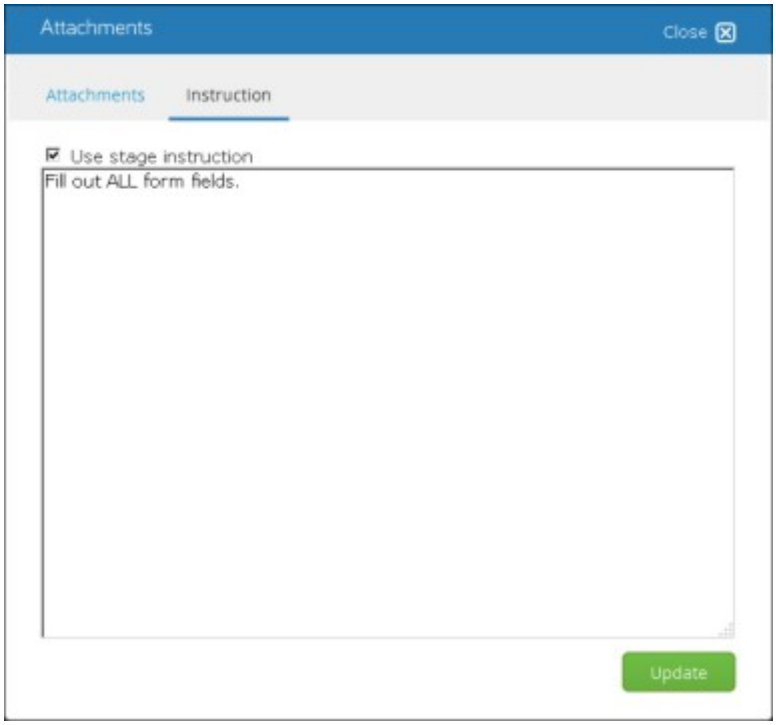
To delete an attachment:

1. Select the workflow stage for which you wish to edit an attachment.
2. Click the

   Attachments button in the Workflow Page toolbar.
   - The Attachments dialog displays and shows a list of attachments for the workflow stage.
3. From the attachments list, click the **delete** link for the desired attachment.
   - The selected attachment is deleted from the list.

To add instructions to a workflow stage:



1. Select the workflow stage to which you wish to add instructions.
2. Click the

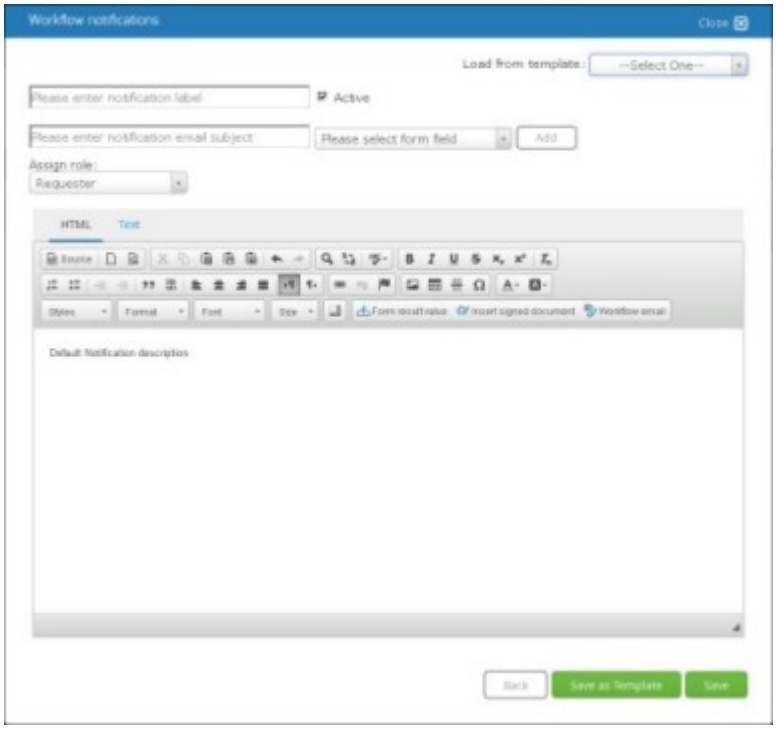
   

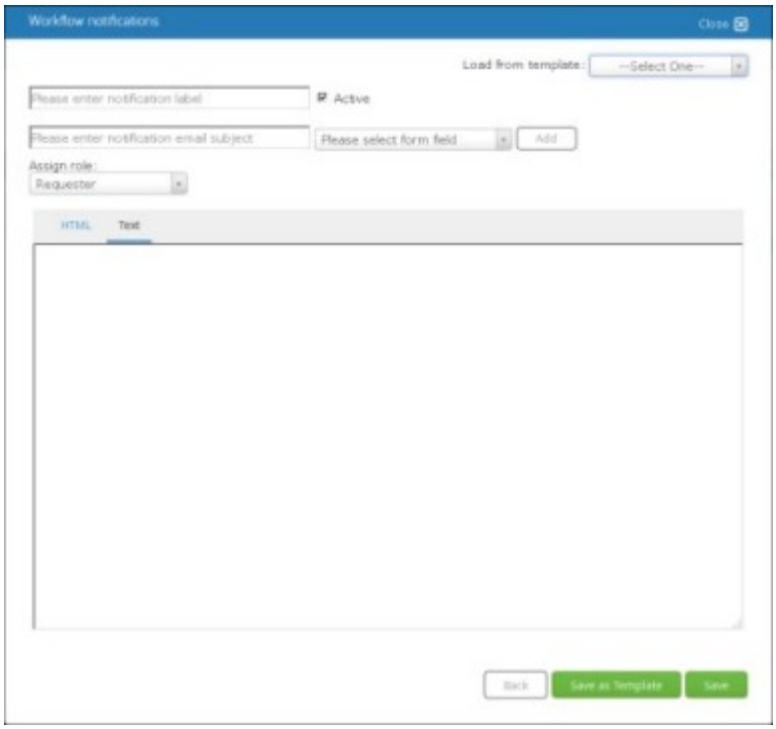
   Attachments button in the Workflow Page toolbar.
   - The Attachments dialog displays. The dialog shows the **Attachments** page by default.
3. Click the **Instruction** tab.
   - The Instruction page displays.
4. Select the **Use stage instruction** check box, then enter instructions for completing the workflow stage in the text box.
5. When all desired instructions have been entered, click the **Update** button to save your changes.
   - A popup dialog displays the message "Stage instruction was updated."
6. Click the **Close** button to close the Attachments dialog and return to the Workflow page.

Configuring Notifications

The **Notifications** property is a relationship-level property that lets you define the content of the email notification sent to the user responsible for completing the next stage of the workflow, as well as configure informational notifications to other users. The **Next participant notification** is provided by default and *cannot be deleted*.

To configure an information notification:





1. Select the workflow relationship for which you wish to configure a notification.
2. Click the

   Notifications button in the Workflow Page toolbar.
   - The Workflow notifications dialog displays.
   - The Workflow notifications dialog shows the **Next participant notification** and any **Information notifications** configured for the relationship.

3. Click the **Add** button.
   - The Workflow notifications dialog dialog refreshes to display the notification entry fields.

4. If desired, select a template for the notification from the **Load from template** menu.
   - The **Load from template** menu lists *all* notification templates saved for the active workflow. If no templates are associated with the active workflow, the **Load from template** menu *is not* displayed.

5. Enter a name for the notification in the **Please enter notification label** text box.

6. Select the **Active** check box to set the notification as active.

7. Enter a subject line for the notification email in the **Please enter notification email subject** text box.
   - Use the **Please select form field** menu to use content taken from *one or more* form fields in the subject line.
     - The **Please select form field** menu lists *all form fields* for the associated workflow.

- Select the desired form field from the **Please select form field** menu, then click the **Add** button. The name of the selected form field (e.g.,
  ParseError: EOF expected (click for details)

  > **Callstack:**
  > **at (TAP/UserManual/How-to_Articles/Configuring_Notifications), /content/body/div[1]/ol/li[7]/ul/li/ul/li[2]/strong[3]/span, line 1, column 9**

) is added to the **Please enter notification email subject** text box at the current cursor location.
- Repeat as necessary to add additional form fields to the subject line.

8. Select the user to receive the information notification from the **Assign role** menu.
   - The **Assign role** menu lists *all user roles* defined for the associated workflow.

9. Enter the notification message.
   - To create an HTML notification message:
     - Click the **HTML** link to display the HTML editor page.

       NOTE

       The Workflow notification HTML editor uses the Open Source CKEditor HTML editor to create the expiration notification content. Click here to find information on using the features and functions available through the CKEditor.
     - Enter and format the content for the notification as desired.
   - To create a text notification message:
     - Click the **Text** link to display the HTML editor page.
     - Enter the content for the notification as desired.

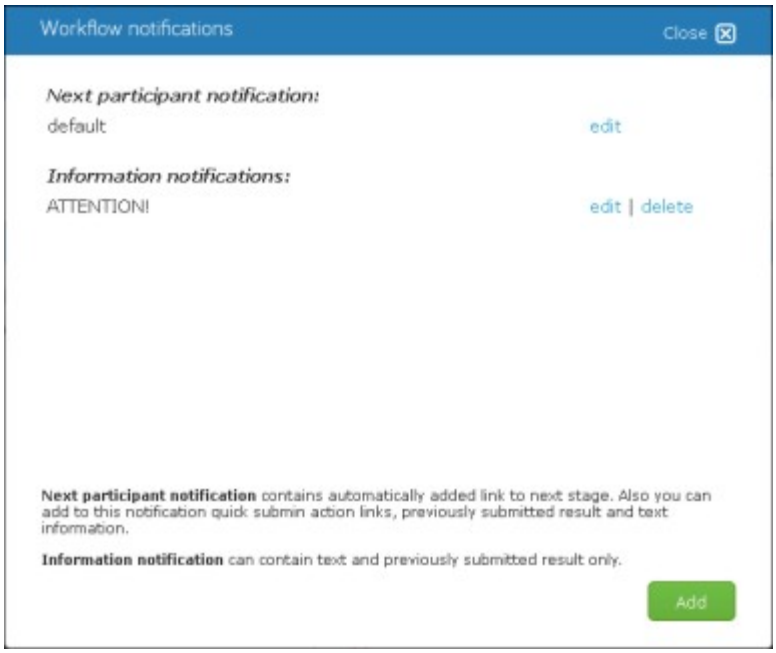
10. When all notification content has been configured as desired, click the **Save** button to save your changes.

To save a notification template:

NOTE

Notification templates let you use a previously created notification as the basis for creating a *new* notification. Notification templates are "workflow-specific," and are available *only* for the workflow to which they were saved.

To save a notification template, create and save a notification as described above, then click the **Save as Template** button to save the current notification as a template. Once a template has been saved, it can be accessed and modified to create a *new* notification for *any stage* in the active workflow.



To edit a notification:

1. Select the workflow relationship for which you wish to edit a notification.
2. Click the

   Notifications button in the Workflow Page toolbar.
   - The Workflow notifications dialog displays.
   - The Workflow notifications dialog shows the **Next participant notification** and any **Information notifications** configured for the relationship.
3. Click the **edit** link for the notification you wish to edit.
   - The Workflow notifications dialog refreshes to display the current values for the notification.
4. Edit the parameters for the notification as desired.
5. When all desired changes have been made, click the **Save** button to save your changes.
   - The Workflow notifications list displays.

To delete a notification:

NOTE

The **Next participant notification** is *mandatory*, and *cannot* be deleted.

1. Select the workflow relationship for which you wish to edit a notification.
2. Click the

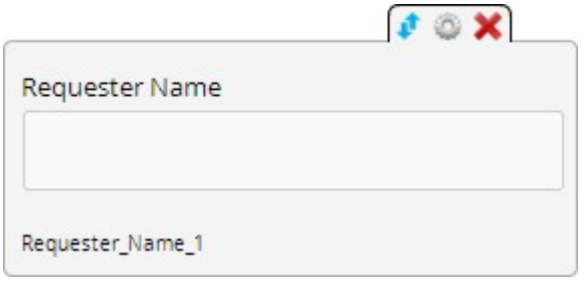
   

   Notifications button in the Workflow Page toolbar.
   - The Workflow notifications dialog displays.
   - The Workflow notifications dialog shows the **Next participant notification** and any **Information notifications** configured for the relationship.

3. Click the **delete** link for the notification you wish to delete.
   - The Workflow notifications list refreshes with the selected notification removed from the list.

Text Tagging in Microsoft Word Documents

When you send a contract out for signature, you can tag the contract so that information captured in a form is merged into the contract. Text tagging lets you merge text fields into your final document, as well as provide the receiving party with a place to sign the contract.



The TAP system uses element ID for a form field to merge data from a webform directly into a document template.

To use element IDs for text tagging, the IDs must comply with the following requirements.

1. "Blank" spaces must be replaced with underscores; e.g., "_"
2. The element ID cannot start with a number or a special character

The method used to populate a Word document with information from a webform depends on whether your eSignature provider is Adobe Sign or Docusign. Determine which provider you use and then follow the appropriate directions below.

When tagging with Adobe Sign in Word, different syntax is used for tagging text fields and signature fields.

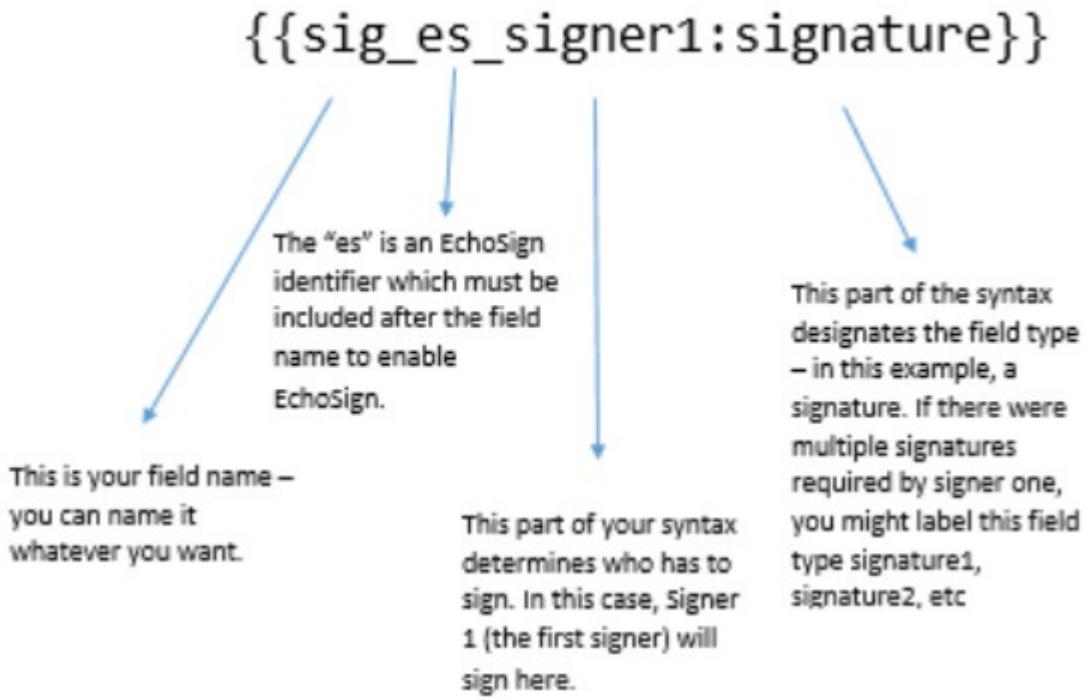
Text Fields

To merge a text field into a Word document, place the corresponding element ID inside curly brackets – **{{ }}**. For example, to merge the "Requester_name_1" form field into a Word document, add the tag **{{Requester_name_1}}** to the document at the desired location.

To designate a merged text field as "read only," add an exclamation mark at the beginning of the element ID. For example: {{!Requester_name_1}}.

Signature Fields

Signature fields do not pull data from the webform. A signature field is used by the signer to add his or her signature. The notation for adding a signature field is **{{sig_es_:signer1:signature}}**, as defined in the accompanying diagram.

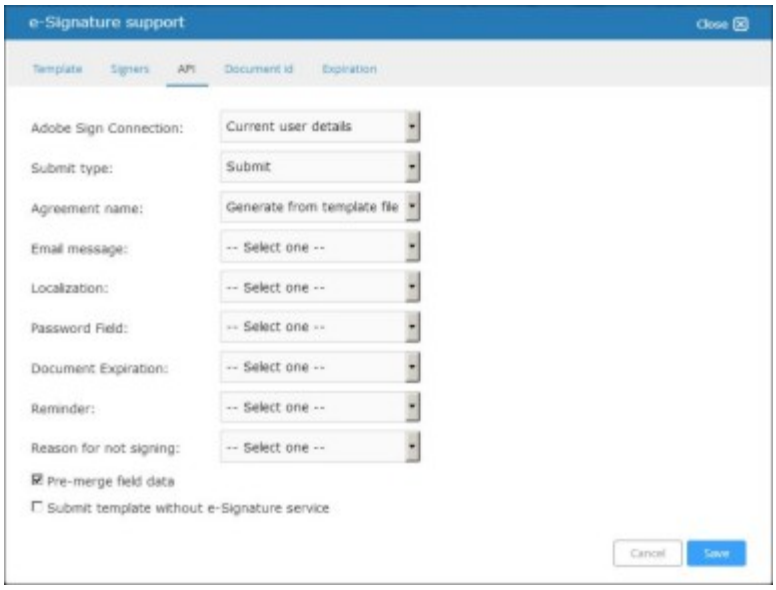


The same rules of syntax apply when merging information into a PDF document; however, the curly brackets are not necessary.

Pre-merge Text Fields

By default, the amount of space added to the Word document for insertion of the form field content is determined by the amount of space between the curly brackets. If the element ID is short, such as the word "name," the space into which the name will merge may be too small.

Select the **Pre-merge field data** check box when configuring eSignature support to use TAP functionality to properly format merged text tags in your documents.



When tagging with DocuSign in Word, different syntax is used for tagging text fields, signature fields, and signature date fields.

You can use either of the following methods to add element ID tags to your document:

1. **White Out method** – Copy the element ID and paste it into the appropriate location in the document. Thereafter, “white out” the text of the element ID. This is required as the system will merge the data over the element ID.

2. **Curly Braces/Brackets method** – Paste the element ID between double opening and closing curly braces/ brackets in the appropriate locations in the document.

Text Fields

Text fields function as described above. For example, **{{Requester_Name_1}}** will merge form field data.

NOTE

In order to use this method you must define the process in the API section of eSignature support.

Signature Fields

Signature fields do not pull data from the webform. A signature field is used by the signer to add his or her signature. The notation for adding a signature field is:

Signer1 – for the first signer

Signer2 – for the second signer

Signature Date Fields

A signature date field is used by the signer to add the date on which the document was signed. The notation for adding a signature date field is:

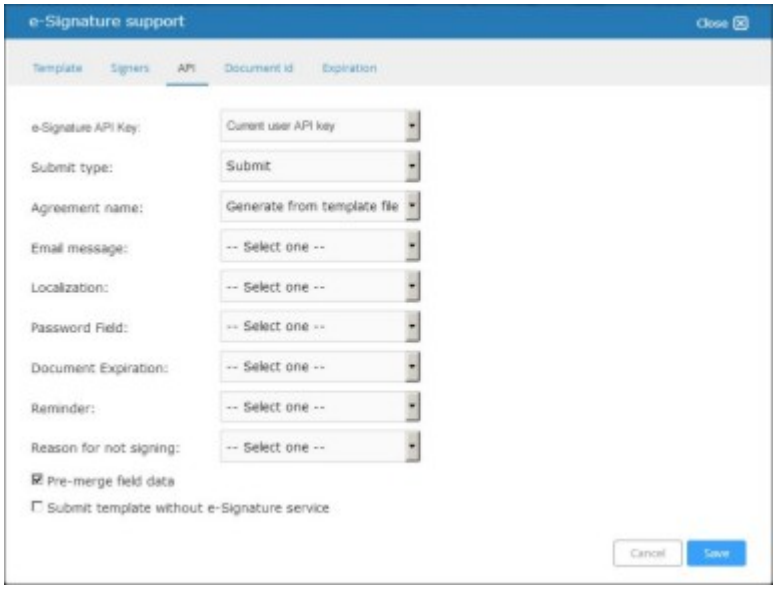
Date1 – for signer 1 date

Date2 – for signer 2 date

Pre-merge Text Fields

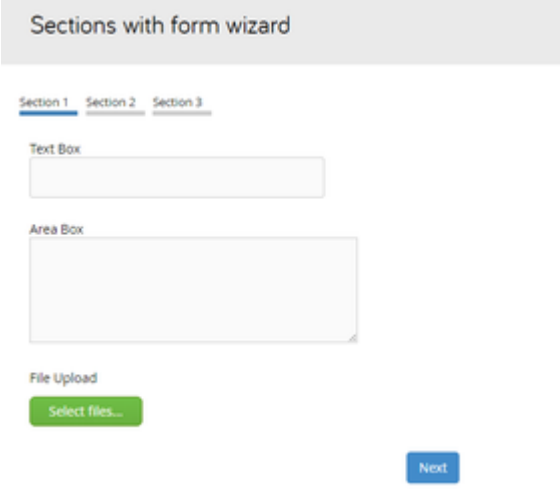
By default, the amount of space added to the Word document for insertion of the form field content is determined by the amount of space between the curly brackets. If the element ID is short, such as the word "name," the space into which the name will merge may be too small.

Select the **Pre-merge field data** check box when configuring eSignature support to use TAP functionality to properly format merged text tags in your documents.



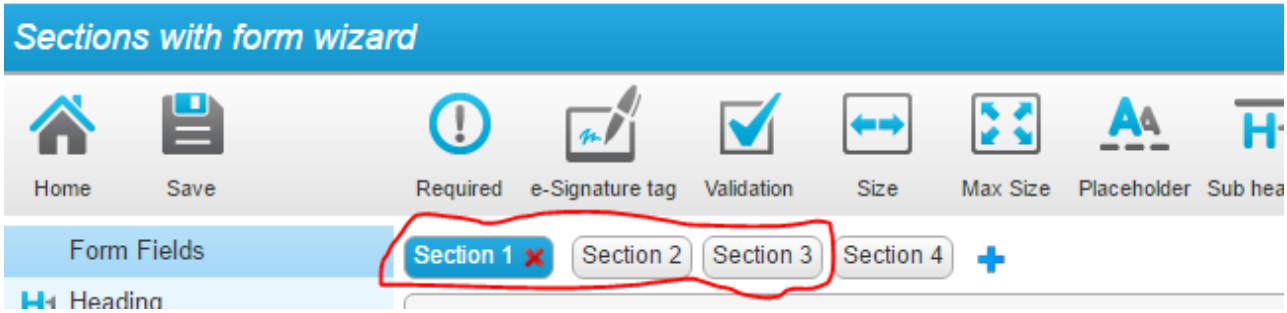
How do I segment a long form into short, click-through sections?

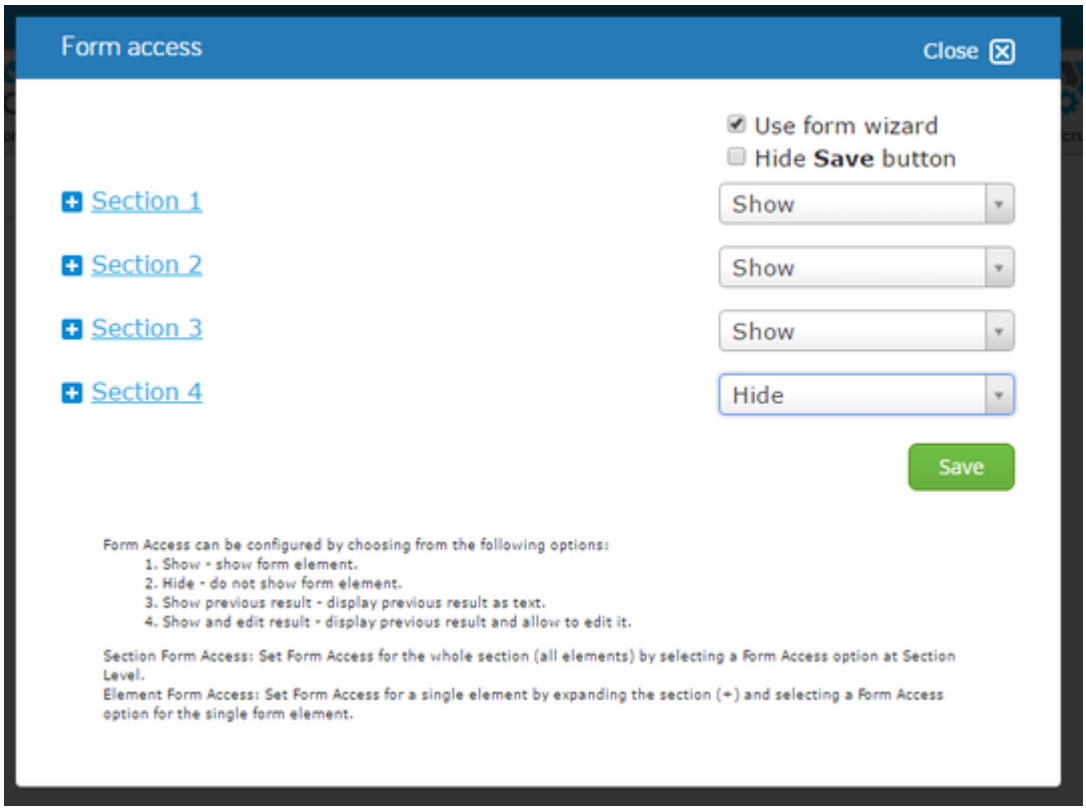
When your end user needs to fill out a monster long form, you might want to break the form up into more manageable sections for them to click through.



Segment your forms using Form Wizard:

1. In the form builder, separate your form fields into different sections.
2. Toggle to your Workflow Builder
3. Assign form access to your stage (this is the stage at which your end user is filling in the long form).
4. Assign each section that you wish to be visible to your end user as "show"
5. Select, "Use Form Wizard."
6. Save and preview.





Related articles

- E-Signature Support for Relationships
- Text Tagging in Microsoft Word Documents
- Form Access
- How do I use Workflow Templates?

Documentation Tagging

Here is documentation regarding the available tag types and the different options you can add that are specific to Adobe Sign.

https://www.scribd.com/doc/185973204/Adobe-EchoSign-Text-Tag-Documentation

Use double brackets in Word and those fields will be converted to form fields.

Double brackets are not necessary when adding form fields in Adobe Acrobat Reader, just use the text inside the brackets as the title of the form field.

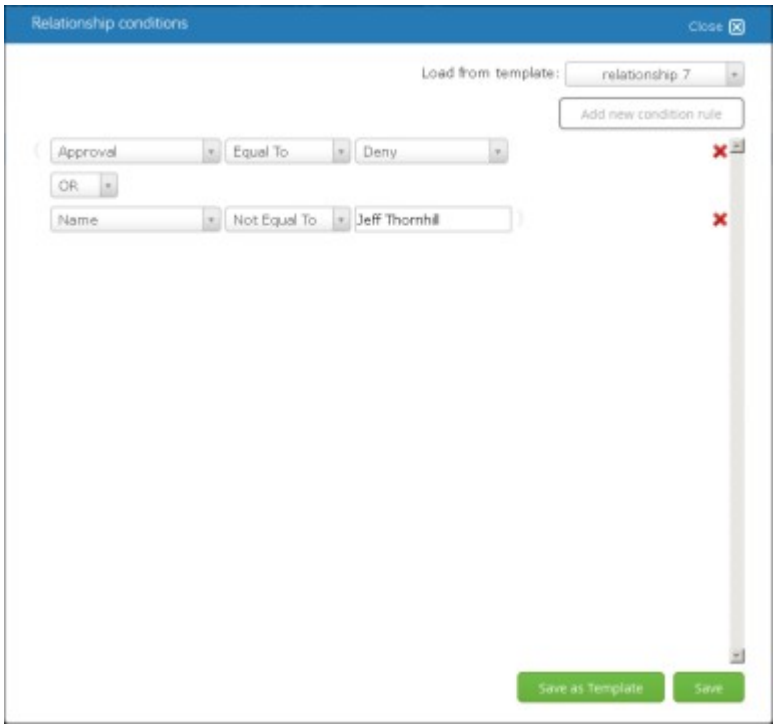
The tags are mostly useful for text fields. It is not necessary to use special dropdown tags in Acrobat Reader, just use a dropdown field. The options work and are still useful for non-text fields (i.e. :signer1)

In order to get fields to populate into a form, the steps are different for each field type. For the remainder of this page, form field title refers to the form field title up to "_es_". For example, if a form field is called "Form_es_:signer1:date", the title is just "Form"

Setting Conditions for a Relationship

The **Conditions** property is a relationship-level property that lets you establish the condition rules under which a relationship is valid when *two or more* relationships are associated with a workflow stage. When multiple relationships exist for a workflow stage, one relationship is designated as the *default* relationship. The default relationship is considered *valid* when all other conditional relationships are *invalid*. The **Conditions** property *cannot* be applied to the default relationship.

To configure a condition rule for a relationship:



1. Select the workflow relationship for which you wish to configure a notification.
2. Click the

   Conditions button in the Workflow Page toolbar.
   - The Relationship conditions dialog displays.

- The Relationship conditions dialog shows a list of *all* currently configured conditions for the relationship.

3. Click the **Add new condition rule** button to display the condition entry fields.
   - To base the new condition on a template, select the desired template from the **Load from template** menu.

4. Select the form field on which to base the condition from the *first* **Please select** menu.

5. Select the matching criteria for the condition from the second please select menu:
   - **Equal to** - the condition will be *valid* when the content of the form field is an *exact match* to the value specified
   - **Not equal to** - the condition will be *valid* when the content of the form field is not an *exact match* to the value specified
   - **Contains** - the condition will be *valid* when the content of the form field *includes* the specified value *anywhere* in the field
   - **Does not contain** - the condition will be *valid* when the content of the form field *does not include* the specified value *anywhere* in the field
   - **Filled** - the condition will be *valid* when the form field *does* contain a value (is *filled*)
   - **Not filled** - the condition will be *valid* when the form field *does not* contain a value (is *empty*)

6. Specify the term against which the matching criteria will be applied.

   - Select the desired value from the drop-down menu, *or*, enter the desired value in the text box, as applicable.

     NOTE

     When a matching criteria of **Filled** or **Not filled** is selected, term options are not applicable.

7. To add another rule to the condition, click the **Add new condition rule** button.
   - The Conditions dialog refreshes to display a new "select field" menu.
   - Choose the Boolean operator to be applied between the rules.
     - Select **AND** if *both* rules must be met to satisfy the condition.
     - Select **OR** if *either* rule must be met to satisfy the condition.
     - Repeat steps **4** through **6** to specify the conditions for the new rule.
     - Repeat step **7** to add *additional* rules to the condition, as desired.

8. When all necessary values for the condition rule have been specified, click the **Save** button to save the rule.

To save a condition template:

NOTE

Condition templates let you use a previously created condition rule as the basis for creating a *new* condition. Condition templates are "workflow-specific," and are available *only* for the workflow to which they were saved.

To save a condition template, create and save a condition as described above, then click the **Save as Template** button to save the current condition rule as a template. Once a template has been saved, it can be accessed and modified to create a *new* condition for *any stage* in the active workflow.

To delete a condition rule:

1. Select the workflow relationship for which you wish to configure a notification.
2. Click the

   Conditions button in the Workflow Page toolbar.
   - The Relationship conditions dialog displays.
   - The Relationship conditions dialog shows a list of *all* currently configured conditions for the relationship.
3. Click the

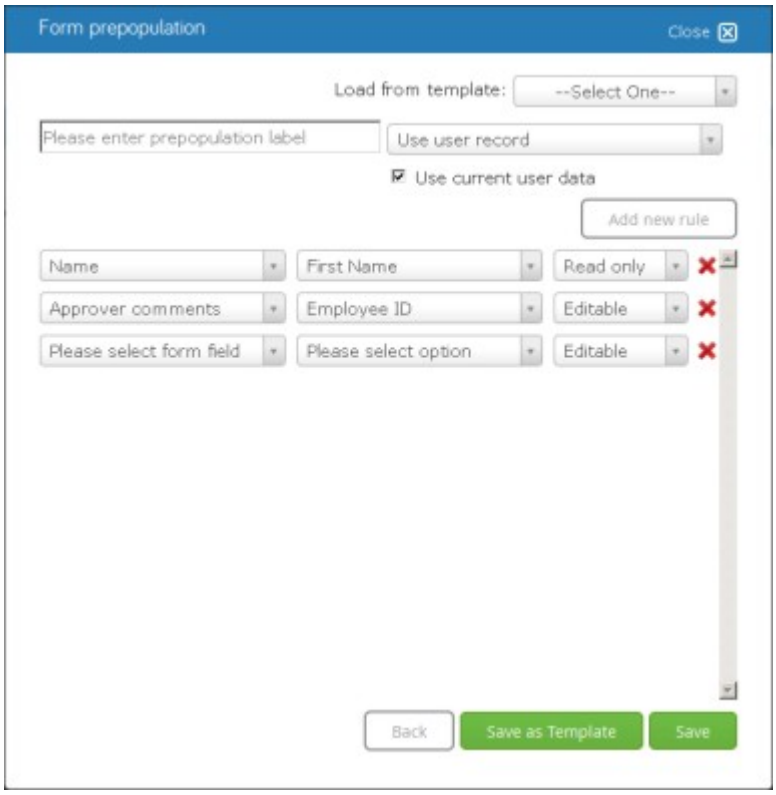
   

   icon for the condition rule you wish to delete.
   - The Relationship conditions dialog refreshes with the selected condition rule (and associated logical operator, where applicable) removed from the list

Form Prepopulation

The **Form prepopulation** property lets you specify default values for form fields for a given workflow stage with data taken from a specified source (user record, workflow record, Salesforce record, grid data source record). Prepopulated form fields can be configured as "editable" or "read only."

To prepopulate form fields from a user record:



1. Select the workflow stage for which you wish to configure a condition.
2. Click the

   Form prepopulation button in the Workflow Page toolbar.
   - The Form prepopulation dialog displays.
   - If prepopulation rules were previously defined, the dialog shows a list of rules.

- If no prepopulation rules have been defined, the list is empty.

3. Click the **Add** button.
   - The Form prepopulation dialog refreshes to display the prepopulation options.

4. If desired, select a template for the prepopulation rule from the **Load from template** menu.
   - The **Load from template** menu lists *all* form prepopulation rules saved for the active workflow. If no templates are associated with the active workflow, the **Load from template** menu *is not* displayed.

5. Enter a name for the prepopulation rule in the **Please enter prepopulation label** text box.

6. Select **Use user record** from the drop-down menu.

7. Select the **Use current user data** checkbox to prepopulate the form with data from the current user's user record according to the rules specified.

8. Click the **Add new rule** button.
   - The Form prepopulation dialog refreshes to display a data entry line for the new rule.

9. Select the form field you wish to prepopulate from the **Please select form field** menu.
   - The **Please select form field** menu lists *all* form fields in the associated workflow form.

10. Select the user record field containing the data you wish to use to populate the selected form field from the **Please select option** menu.
    - The **Please select option** menu lists *all* available user record fields.

11. Indicate whether or not the prepopulated field can be edited by selecting **Editable** or **Read only** from the third menu.

12. To add another prepopulation rule, repeat steps **8** through **11**.
    - To remove a rule, click the

      icon for the rule you wish to delete.
      - The Form prepopulation dialog refreshes with the selected rule removed from the list.

13. When all desired prepopulation rules have been entered, click the **Save** button to save the rules, then click the **Close** button to close the Form prepopulation dialog and return to the Workflow Page.

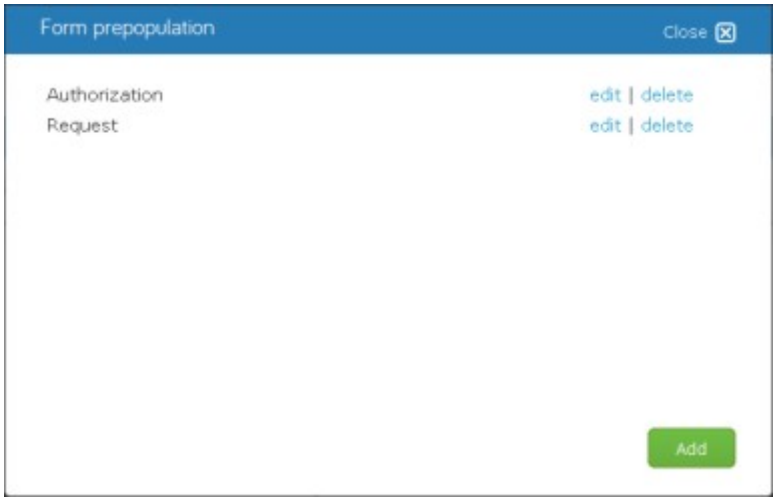
To save a form prepopulation template:

NOTE

Form prepopulation templates let you use previously created rules as the basis for creating *new* rules. Templates are "workflow-specific," and are available *only* for the workflow to which they were saved.

To save a form prepopulation template, create and save the desired prepopulation rules as described above, then click the **Save as Template** button to save the current rule(s) as a template. Once a template has been saved, it can be accessed and modified to create a *new* prepopulation rule for *any stage* in the active workflow.

To edit prepopulation rules:



1. Select the workflow stage for which you wish to configure a condition.
2. Click the  **Form prepopulation** button in the Workflow Page toolbar.
3.
   - The Form prepopulation dialog displays.
   - The dialog shows a list of all currently configured prepopulation rules for the workflow stage.
4. Click the **edit** link for the rule you wish to edit.
   - The Form prepopulation dialog refreshes to display the current values for the selected rule.
5. Edit the values for the rule as desired.
   - To remove a rule, click the  icon for the rule you wish to delete.

6. When all desired changes have been made, click the **Save** button, then click the **Close** button to close the Form prepopulation dialog and return to the Workflow Page.

To delete prepopulation rules:

1. Select the workflow stage for which you wish to configure a condition.
2. Click the

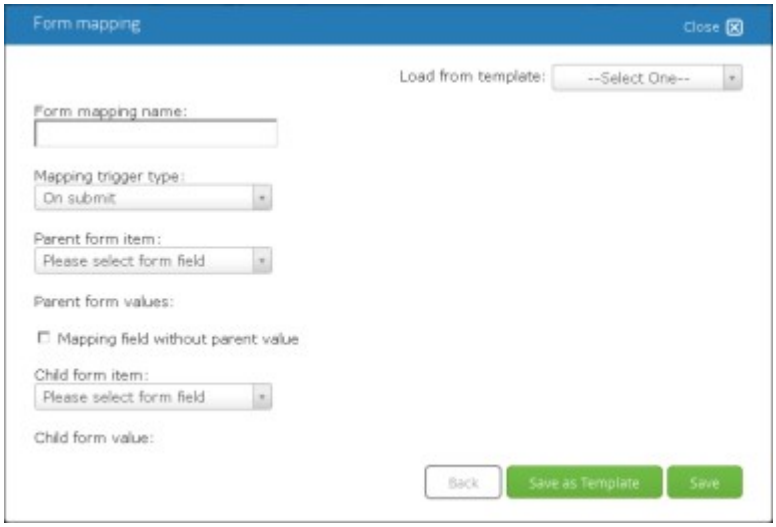
   Form prepopulation button in the Workflow Page toolbar.
3.
   - The Form prepopulation dialog displays.
   - The dialog shows a list of all currently configured prepopulation rules for the workflow stage.
4. Click the **delete** link for the prepopulation rule you wish to delete.
   - The Form prepopulation dialog refreshes with the selected rule removed from the list.
5. When all desired rules have been deleted, click the **Close** button to close the Form prepopulation dialog and return to the Workflow Page.

Form Mapping

Form Mapping lets you create "auto-text" values that are entered in selected form fields for a workflow stage when a specified trigger event occurs (when the workflow stage is submitted or when a change is made to a form item value). Two types form mapping are supported:

- **Parent/Child Mapping:** The auto-text for a given field (child) is dependent on the content of a second field (parent).
- **Trigger-Only Mapping**: The auto-text is entered in the field automatically when the trigger event occurs.

To perform parent/child form field mapping:



1. Select the workflow stage for which you wish to map a form field.
2. Click the

   Form mapping button in the Workflow Page toolbar.
   - The Form mapping dialog displays.
   - If form fields were previously mapped, the dialog shows a list of map names.
   - If no form fields have been mapped, the list is empty.
3. Click the **Add** button.

- The Form mapping dialog refreshes to display the mapping options.

4. If desired, select a template for the form map from the **Load from template** menu.
   - The **Load from template** menu lists *all* form map templates saved for the active workflow. If no templates are associated with the active workflow, the **Load from template** menu *is not* displayed.

5. Enter a name for the mapped value in the **Form mapping name** text box.

6. Select the trigger for the auto-text entry from the **Mapping trigger type** menu:
   - **On submit** - the **Child form value** (auto-text) will be entered in the **Child form item** (mapped field) when the workflow stage is submitted.
   - **On change form item value** - the **Child form value** (auto-text) will be entered in the **Child form item** (mapped field) when the content of the **Child form item** (mapped field) is changed.

7. Select the field on which the mapping will be based from the **Parent form item** menu.
   - The **Parent form item** menu lists *all fields* in the associated workflow form.

8. Select the value that will trigger the auto-text entry from the **Parent form values** menu.
   - You can specify *one or more* **Parent form values**.
   - Click the **Parent form values** field and select the desired value. Repeat as necessary to select *additional* values.
     - To *remove* a value from the **Parent form values** field, click the **x** icon for the desired value.
   - To *batch select* **Parent form values**:

     NOTE

     The **batch select values** link is available *only* when the selected **Parent form item** field contains *two or more* preset optional values.

     - Click the **batch select values** link; the Batch select dialog displays.
     - Enter *two or more* valid values for the **Parent form item** in the text box provided, one value per line.
     - When all desired values have been entered, click the **Save** button to save your changes and return to the Form mapping dialog.

       NOTE

       If you enter an invalid value in the Batch select dialog, an advisory popup displays the message "You have entered in values that are not present in the Parent Form Mapping field: (*invalid entries*). Please edit these values and re-save." Edit the content of the Batch select dialog as necessary, then click the **Save** button to save your changes.

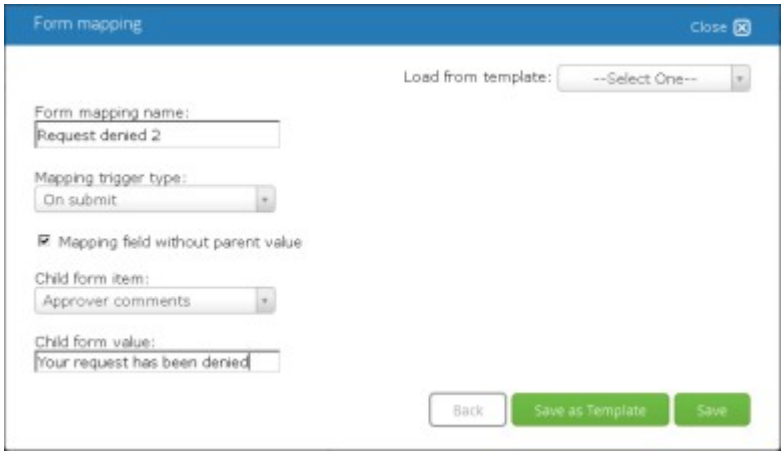
9. Select the field into which the auto-text value will be inserted from the **Child form item** menu.

- The **Child form item** menu lists all fields in the associated workflow form *except* the field selected as the **Parent form item**.

10. Enter the value to be inserted into the **Child form item** field in the **Child form value** text box.

11. When all necessary parameters have been specified, click the **Save** button to save your changes.
    - The Form mapping dialog refreshes with the new map added to the list.

To perform trigger-only form field mapping:



1. Select the workflow stage for which you wish to map a form field.
2. Click the

   Form mapping button in the Workflow Page toolbar.
3.
   - The Form mapping dialog displays.
   - If form fields were previously mapped, the dialog shows a list of map names.
   - If no form fields have been mapped, the list is empty.

4. Click the **Add** button.
   - The Form mapping dialog refreshes to display the mapping options.

5. If desired, select a template for the form map from the **Load from template** menu.
   - The **Load from template** menu lists *all* form map templates saved for the active workflow. If no templates are associated with the active workflow, the **Load from template** menu *is not* displayed.

6. Enter a name for the mapped value in the **Form mapping name** text box.

7. Select **On submit** from the **Mapping trigger type** menu

NOTE

The **On change form item value** option should not be used for "trigger-only" form field mapping..

8. Select the **Mapping field without parent value** check box.

9. Select the field into which the auto-text value will be inserted from the **Child form item** menu.
   - The **Child form item** menu lists *all fields* in the associated workflow form.

10. Enter the value to be inserted into the **Child form item** field in the **Child form value** text box.

11. When all necessary parameters have been specified, click the **Save** button to save your changes.
    - The Form mapping dialog refreshes with the new map added to the list.

To save a form map template:

NOTE

Form map templates let you use a previously created form map as the basis for creating a *new* form map. Form map templates are "workflow-specific," and are available *only* for the workflow to which they were saved.

To save a form map template, create and save a form map as described above, then click the **Save as Template** button to save the current form map as a template. Once a template has been saved, it can be accessed and modified to create a *new* form map for *any stage* in the active workflow.

To edit a form map:

1. Select the workflow stage for which you wish to map a form field.
2. Click the

Form mapping button in the Workflow Page toolbar.

3.
   - The Form mapping dialog displays.
   - The dialog shows a list of map names for the workflow stage.

4. Click the **edit** link for the form map you wish to edit.
   - The Form mapping dialog refreshes to display the current values for the form map.

5. Edit the parameters for the form map as desired.

6. When all desired changes have been made, click the **Save** button to save your changes.
   - The form map list displays.

To delete a form map:

1. Select the workflow stage for which you wish to map a form field.
2. Click the

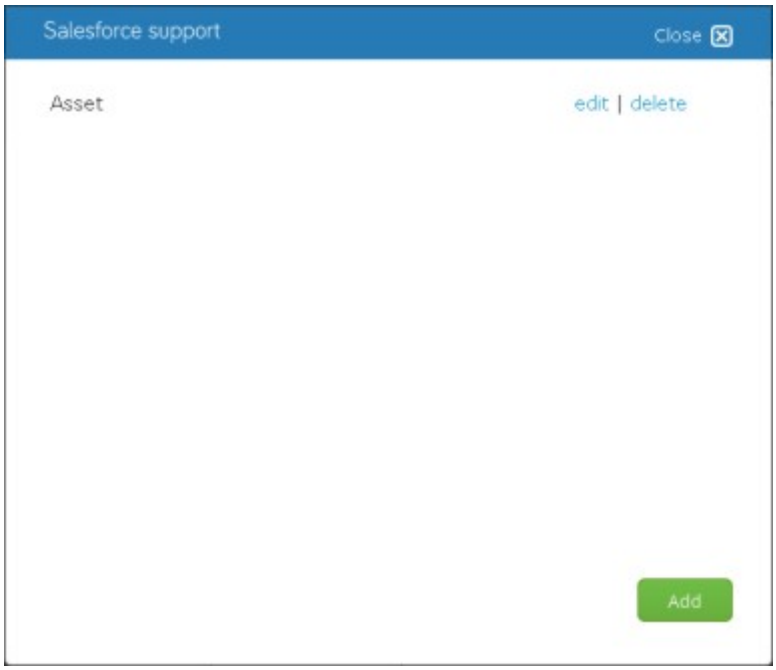
Form mapping button in the Workflow Page toolbar.

3.
   - The Form mapping dialog displays.
   - The dialog shows a list of map names for the workflow stage.

4. Click the **delete** link for the form map you wish to delete.
   - The form map list refreshes with the selected map removed from the list.

Salesforce Support

The **Salesforce support** property lets you define the attributes, options and trigger conditions for Salesforce integration with a relationship. Click the **Salesforce support** button to display the Salesforce support dialog.



To access Salesforce support:

1. Select the workflow relationship for which you wish to configure Salesforce support.
2. Click the

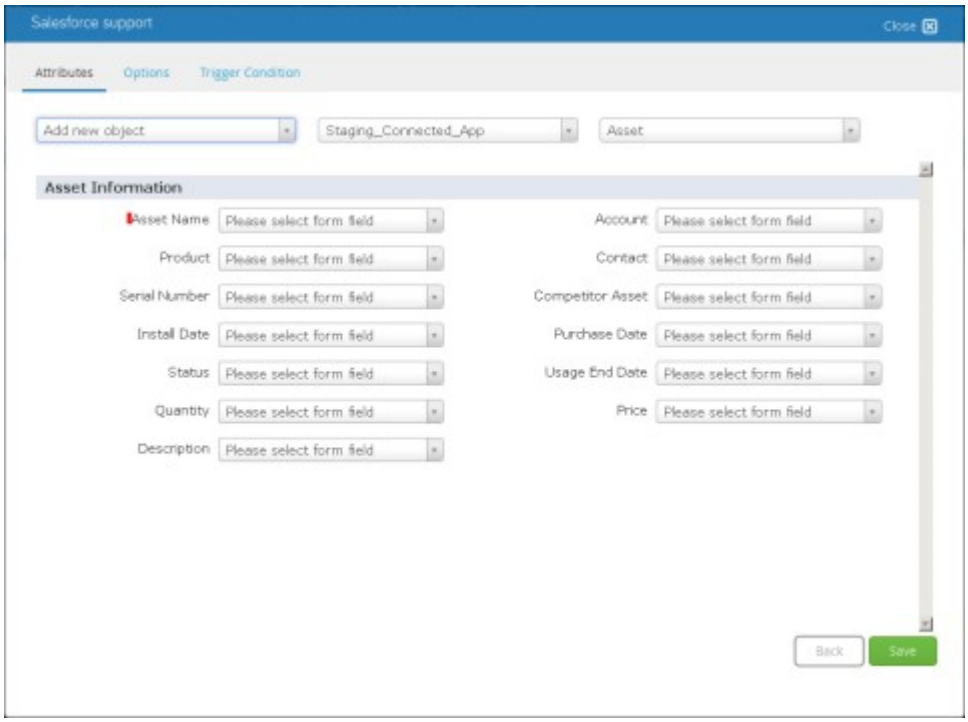
   Salesforce support button in the Workflow Page toolbar.
   - The Salesforce support page displays.
   - The Salesforce support page shows a list of *all* currently defined Salesforce support configurations for the relationship.

3. To create a *new* Salesforce support configuration, click the **Add** button.

4. To edit an *existing* Salesforce support configuration, click the **edit** link for the desired configuration.

You can define a *new* Salesforce support configuration for the currently selected relationship.

To configure attributes for a *new* Salesforce object:



1. Access the Salesforce support dialog.

2. Click the **Attributes** link on the Salesforce support dialog.
   - The Attributes page displays.

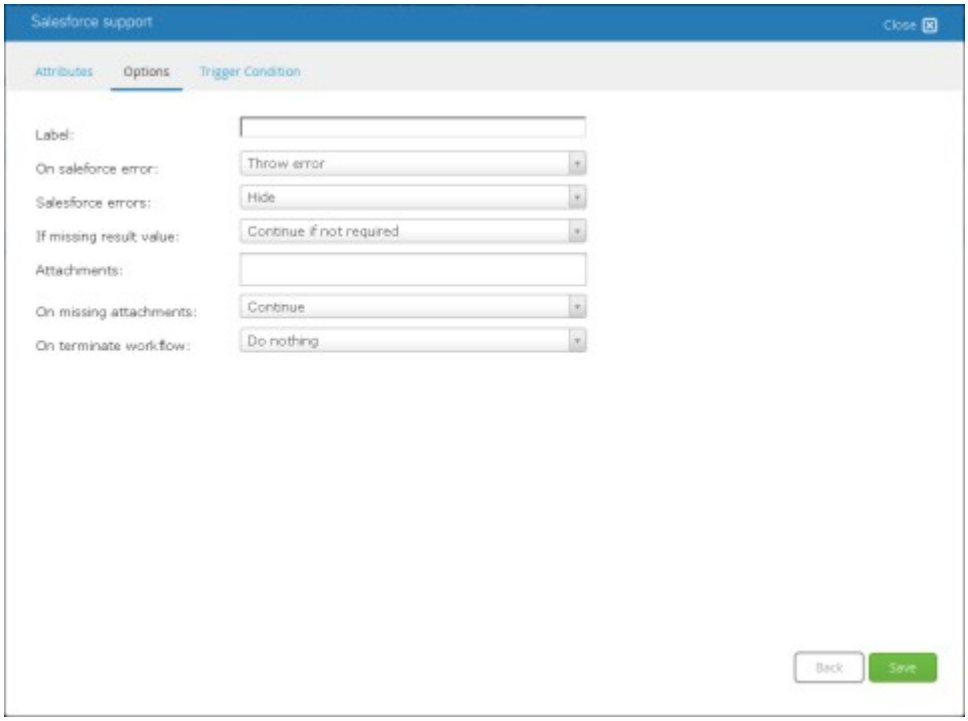
3. Select **Add new object** from the *first* drop-down menu.
   - To edit attributes for an *existing* Salesforce object, select **Update existing object** from the *first* drop-down menu, then choose the desired object from the **Please select object to update** menu.

4. Select the desired Salesforce key from the **Please select salesforce key** menu.
   - The **Please select salesforce key** menu lists all Salesforce keys for which you may configure Salesforce support.

5. Select the desired Salesforce object from the **Please select object type** menu.
   - The **Please select object type** menu lists all available object types for the selected Salesforce key.

6. The Attributes page refreshes to display the specific Salesforce form fields associated with the selected Salesforce object.
7. Make the desired selections from each **Please select form field** menu, as appropriate.
   - Mandatory fields are indicated by a red bar preceding the name of the field. All other fields are optional.
   - You *must* make a selection for *all* mandatory fields.
8. When all desired values have been selected, click the **Save** button to save the Salesforce attributes.
   - The Options page displays.

To configure options for Salesforce support:



1. Access the Salesforce support dialog.

2. Click the **Options** link on the Salesforce support dialog.
   - The Options page displays.

3. Enter a name for the Salesforce support configuration in the **Label** text box.
4. Select the desired handling method when a Salesforce error is generated during the workflow from the **On salesforce error** menu, as desired.
   - **Throw error** - an error is generated for the workflow.
   - **Skip salesforce support** - Salesforce support is terminated for the workflow relationship.

5. If **Throw error** is selected from the **On salesforce error** menu, use the **Salesforce errors** menu to select whether to **Hide** or **Show** the error.

- The **On salesforce error** menu is shown *only* when **Throw error** is selected from the **On salesforce error** menu.

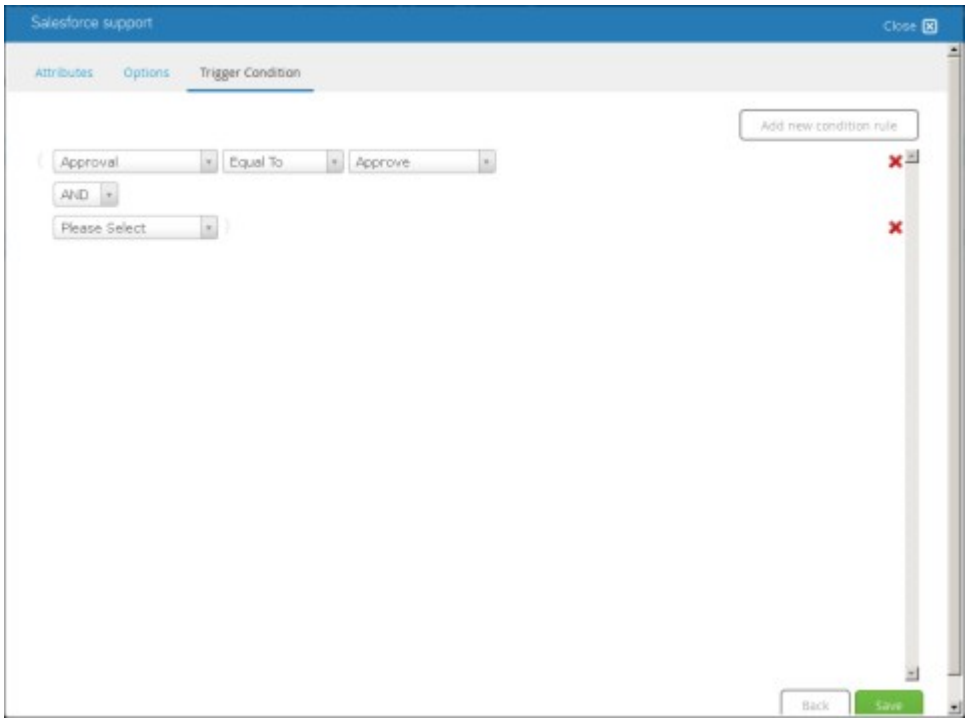
6. Select any mandatory attachments for the workflow from the **Attachments** menu.
   - The **Attachments** menu shows the label for each **File upload** or **Multi upload** form field in the workflow form.
     - To de-select an attachment, click the **X** next to the attachment name.

7. Select the desired handling method when to be used a mandatory attachment (selected from the **Attachments** menu) has not been included in the workflow stage associated with the relationship from the **On missing attachments** menu.
   - **Continue** - the workflow is allowed to proceed to the next stage.
   - **Throw error** - an error is generated for the workflow.

8. Select the desired handling method to be used when a workflow is manually terminated from the **On terminate workflow** menu.
   - **Do nothing** - no change is made to Salesforce record related to the workflow.
   - **Update salesforce record** - the Salesforce record associated with the workflow is updated upon manual termination.

9. When all options have been configured, click the **Save** button to save the option settings.

To configure trigger conditions for Salesforce support:



1. Access the Salesforce support dialog.

2. Click the **Trigger conditions** link on the Salesforce support dialog.
   - The Trigger conditions page displays.

3. Click the **Add new condition rule** button to display the condition entry fields.

4. Select the form field on which to base the condition from the *first* **Please select** menu.

5. Select the matching criteria for the condition from the second please select menu:
   - **Equal to** - the condition will be *valid* when the content of the form field is an *exact match* to the value specified
   - **Not equal to** - the condition will be *valid* when the content of the form field is not an *exact match* to the value specified
   - **Contains** - the condition will be *valid* when the content of the form field *includes* the specified value *anywhere* in the field
   - **Does not contain** - the condition will be *valid* when the content of the form field *does not include* the specified value *anywhere* in the field
   - **Filled** - the condition will be *valid* when the form field *does* contain a value (is *filled*)
   - **Not filled** - the condition will be *valid* when the form field *does not* contain a value (is *empty*)

6. Specify the term against which the matching criteria will be applied.

   - Select the desired value from the drop-down menu, *or*, enter the desired value in the text box, as applicable.

     NOTE

     When a matching criteria of **Filled** or **Not filled** is selected, term options are not applicable.

7. To add another rule to the condition, click the **Add new condition rule** button.
   - The Conditions dialog refreshes to display a new "select field" menu.
   - Choose the Boolean operator to be applied between the rules.
     - Select **AND** if *both* rules must be met to satisfy the condition.
     - Select **OR** if *either* rule must be met to satisfy the condition.
     - Repeat steps **3** through **5** to specify the conditions for the new rule.
     - Repeat step **6** to add *additional* rules to the condition, as desired.

8. When all necessary values for the condition rule have been specified, click the **Save** button to save the rule.

You can edit an *existing* Salesforce support configuration for the currently selected relationship.

NOTE

You can also edit an *existing* Salesforce support configuration by selecting **Update existing object** from the Attributes page, then choosing the desired object from the **Please select object to update** menu.

To edit a Salesforce support configuration:

1. Access the Salesforce support page.
2. Click the **edit** link for the Salesforce support configuration you wish to edit.
   - The Attributes page displays.
   - The page is pre-filled with the current values for the selected Salesforce support configuration.
3. Edit the attributes, options, and trigger conditions for the Salesforce support configuration as desired.
4. When all desired changes have been made, click the **Save** button to save your changes.

You can delete an *existing* Salesforce support configuration from the currently selected relationship.

To delete a Salesforce support configuration:

1. Access the Salesforce support page.
2. Click the **delete** link for the Salesforce support configuration you wish to delete.
   - The selected Salesforce support configuration is removed from the list.

E-Signature Support for Relationships

The **e-Signature support** property lets you configure e-signature support options for a relationship. You can add an e-signature template, define signers for the relationship, configure API support for one or more e-signature form fields, configure the document ID, and set an expiration for executing the signature(s).

To enable e-signature support:

1. Select the workflow relationship for which you wish to configure e-signature support.

2. Click the

   e-Signature support button in the Workflow Page Toolbar.
   - The e-Signature support dialog displays. The **Template** page displays by default.

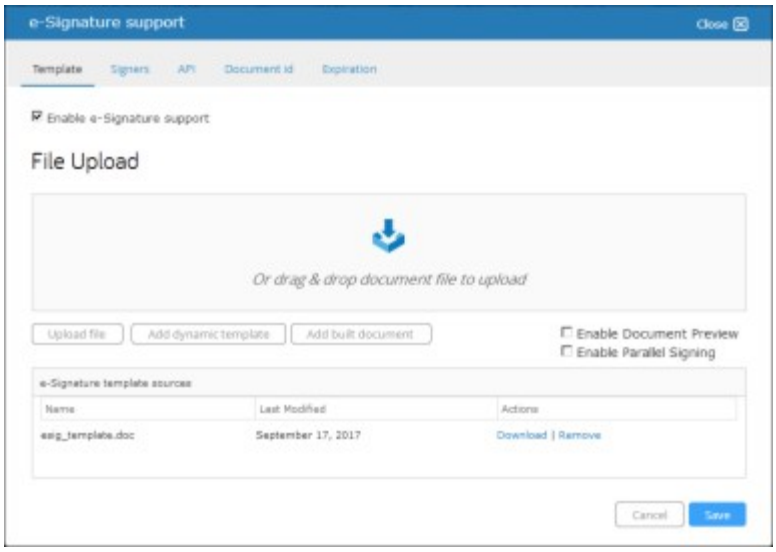
3. Select the **Enable e-Signature support** check box.

To add an e-signature template:

You can upload an e-signature template or reference a file uploaded through a form field in the associated workflow form.

NOTE

When uploading a template file, files *must* be in Adobe Portable Document File (.pdf) or Microsoft Word (.doc, .docx) format.



1. If necessary, click the **Template** tab to display the e-Signature support Template page.

2. Add *at least one* e-signature template. You may add an e-signature template by uploading the desired document or referencing a document added through a form field in the associated workflow form.

   - **To upload a file using "drag and drop:"**
     1. Locate the document you wish to upload on your local workstation.
     2. Make sure both the directory containing the file for upload *and* the e-Signature support dialog are visible on the desktop.
     3. Position the cursor on the file you wish to upload.
     4. Click and hold the left mouse button, then "drag" the file to the **drag & drop document to upload** field on the e-Signature support dialog.
        - When the upload has completed, the uploaded file is shown in the **e-Signature template sources** list.

   - **To upload a file using the Upload file function:**
     1. Click the **Upload file** button.
        - A standard File Upload dialog displays.
     2. Locate and select the document you wish to upload, then click the **Open** button on the File Upload dialog.
        - The File Upload dialog closes automatically.
        - When the upload has completed, the uploaded file is shown in the **e-Signature template sources** list.

   - **To add a dynamic template:**
     1. Click the **Add dynamic template** button.
        - A drop-down menu is added to the **e-Signature template sources** list.
        - The menu lists *all form fields* that can be used as an e-signature template source.

2. Select the desired option from the drop-down menu.

- **To add a built document**
  1. CONTENT IN DEVELOPMENT

- **To download an e-signature template document:**
  1. Click the **Download** link for the desired document in the **e-signature template sources** list.
     - A standard File Download dialog displays.
  2. Select the "save" option from the File Download dialog.
     - A standard Save As dialog displays.
  3. Navigate to the location in which you wish to save the document.
  4. If desired, enter a new name for the document in the **File name** text box. *Be sure* to retain the file extension.
  5. Click the **Save** button on the Save As dialog.
     - The document is downloaded to the selected location.

- **To re-order e-signature template documents:**
  1. Position the cursor on the document you wish to move.
  2. Click and hold the left mouse button.
  3. Drag the document to the desired position, then release the left mouse button.

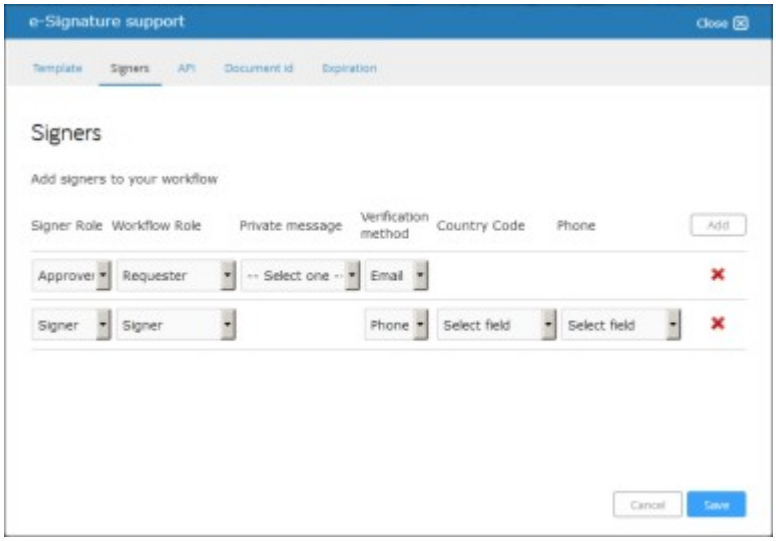
- **To remove an e-signature template document:**
  - Click the **remove** link for the desired document.
    - The selected document is removed from the **e-Signature template sources** list.

3. If you wish to allow users to preview the template document upon receipt of the associated workflow stage, select the **Enable Document Preview** check box.

4. To configure support for Adobe Sign's parallel signing capabilities, select the **Enable Parallel Signing** check box.
   - When the **Enable Parallel Signing** check box is selected, signers can sign in *any* order.

5. When all desired e-signature template documents have been added, click the **Save** button to save your changes.

To add signers:



1. Click the **Signers** tab to display the e-Signature support Signers page.
   - The Signers page includes a single signer by default.

2. Select the appropriate signer role for the the signer from the **Signer Role** drop-down menu:
   - **Signer** - associated workflow role is responsible for signing the document
   - **Approver** - associated workflow role is responsible for approving the executed signature
   - **CC** - associated workflow role will receive courtesy copy of the executed document

3. Select the workflow role responsible for the associated **Signer Role** from the **Workflow Role** drop-down menu.
   - The **Workflow Role** menu lists all workflow roles defined for the workflow.
   - *For Adobe Sign ONLY:* If a Recipient Group is selected from the **Workflow Role** menu, the document is sent to all members of the group. The first group member to sign the document proceeds the signing workflow to the next step.

4. *For Adobe Sign ONLY:* To include a private message to the signer, select the desired Email Message field from the **Private message** menu.
   - The **Private message** menu lists all Email Message field types contained in the "source" workflow stage for the selected relationship.

5. Select the verification method for the signer from the **Verification Method** drop-down menu; **Email** or **Phone**.

   - If **Phone** is selected as the **Verification method**, select the form fields containing the country code and phone number from the **Country Code** and **Phone** drop-down menus. The **Country Code** and **Phone** menus list all text fields contained in the "source" workflow stage for the selected relationship.

     NOTE

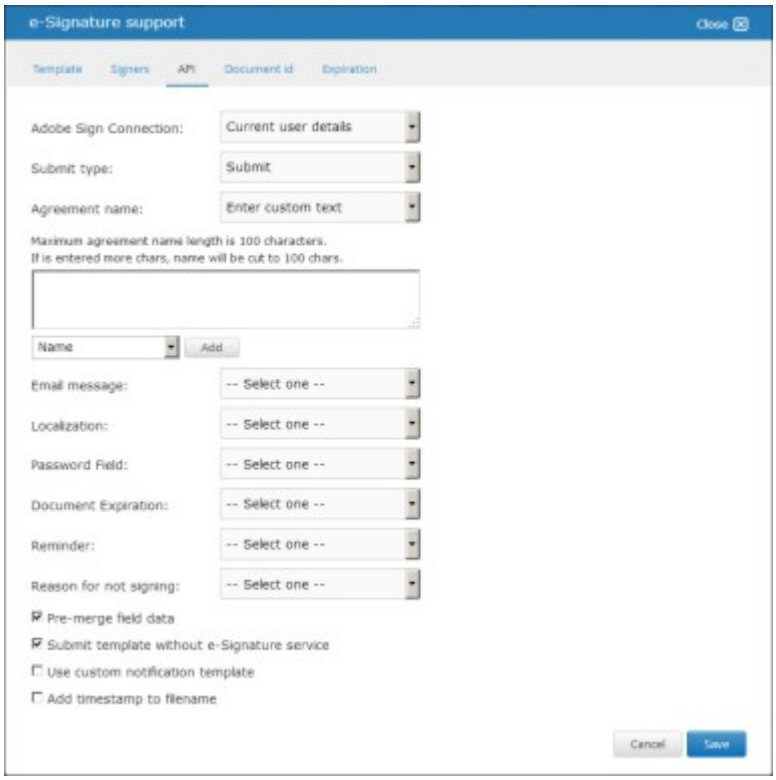
eSignature providers offer a two-factor authentication option for signers via SMS. Both a phone number and email address must be captured to use two-factor authentication for your signers.

6. To add *additional* signers, click the **Add** button, then repeat steps **2** and **3**.
   - To remove a signer from the Signers page, click the

     
     icon next to the desired signer.

7. When all desired signers have been added, click the **Save** button to save your changes.

To configure API support:



1. Click the **API** tab to display the e-Signature support API page.

2. Select the appropriate API from the **e-Signature API key** or **Adobe Sign Connection** drop-down menu, as appropriate.
   - The **e-Signature API key** menu lists all available API keys for your TAP system.
     - The default selection for the **e-Signature API key** menu is **Current user API key**.
   - The **Adobe Sign Connection** menu lists all available connections for your TAP system.
     - The default selection for the **Adobe Sign Connection** menu is **Current user details**.

3. Select the desired submit option for the e-signature(s) from the **Submit type** drop-down menu; **Submit**, **Submit interactive** or **Sign after submission**.

4. Specify the name for the agreement using the **Agreement name** drop-down menu;
   - Select **Generate from template file** to derive the agreement name from an uploaded e-signature template.
   - Select **Enter custom text** to specify a custom name for the agreement. A text box displays into which you will enter the agreement name.
     - Enter the desired agreement name in the text box provided. The agreement name can be a *maximum* of 100 characters.
     - To include content from *one or more* selected form fields in the agreement name, select the desired field from the drop-down menu, then click the **Add**button. The name of the selected form field (e.g., **ParseError: EOF expected (click for details)**

       > **Callstack:**
       > **at (TAP/UserManual/How-to_Articles/E-Signature_Support_for_Relationships), /content/body/div[3]/ol/li[4]/ul/li[2]/ul/li[2]/strong[2]/span, line 1, column 9**

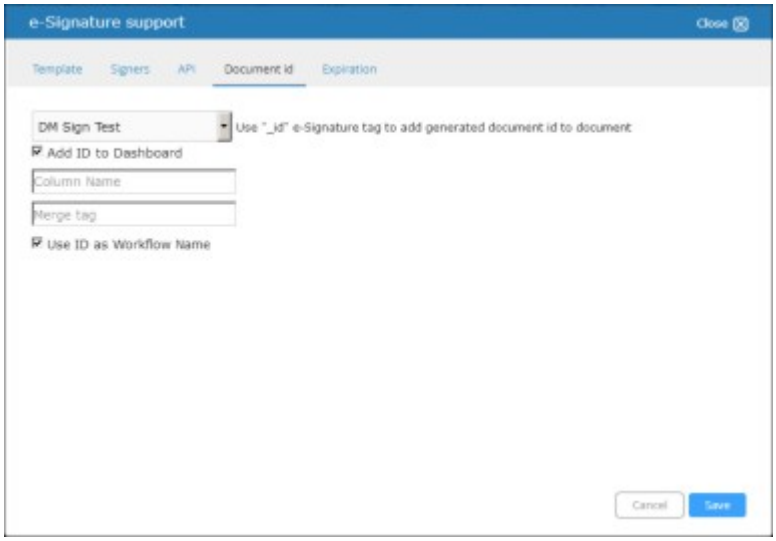
) is added to the text box at the current cursor location.

5. Select the e-signature fields associated with the relationship from the **Email message**, **Localization**, **Password Field**, **Document Expiration**, **Reminder** and/or **Reason for not signing** menus, as applicable.
   - Each menu includes the field names for each field type included in the associated workflow form.

6. To submit the previously uploaded e-signature template as a Microsoft Word or PDF file *only* (with e-Signature service support), select the **Submit template without e-Signature service** check box.
   - If the **Submit template without e-Signature service** check box is selected, the **Use custom notification template** and **Add timestamp to filename** check boxes display, and a **Notification** tab is added to the e-Signature support dialog.
     - If you wish to use a custom notification (rather than the the default notification from the relationship) as the notification text for e-signatures, select the **Use custom notification template** check box, and configure the **Notification** text.
     - If you wish to include a timestamp in the filename of the Microsoft Word or PDF file, select the **Add timestamp to filename** check box.

7. When API support has been configured as desired, click the **Save** button to save your changes.

To configure the document ID:



1. Click the **Document id** tab to display the e-Signature support Document id page.

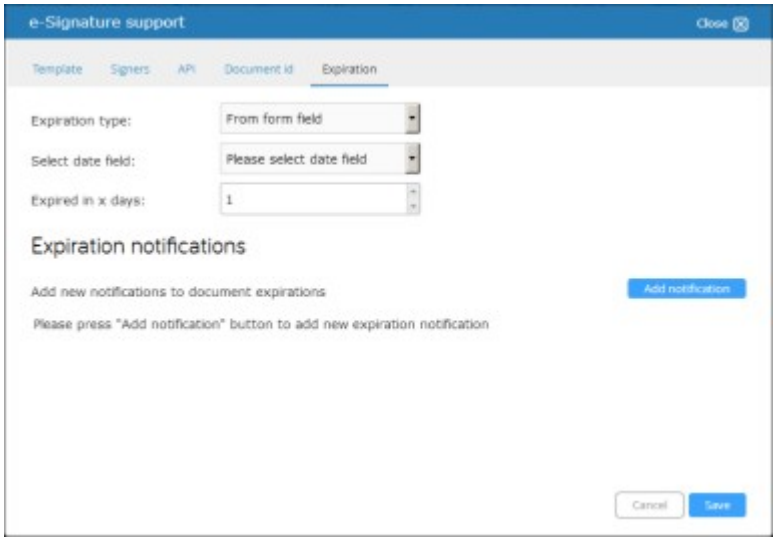
2. Select the desired document ID from the **Select an ID Sequence** menu.
   - The **Select an ID Sequence** menu lists *all* auto-generated ID sequences defined through the **Sequence Generator** option.

3. To add the document ID to the Workflow Dashboard, select the **Add ID to Dashboard** check box. If the **Add ID to Dashboard** check box is selected, complete the following fields:
   - **Column Name** -determines the name of the column in which the document ID will be displayed
   - **Merge Tag** - determines the tag with which the selected ID sequence will be merged to generate the document ID.

4. To use the document ID as the workflow name, select the **Use ID as Workflow Name** checkbox.

5. When the document ID has been configured as desired, click the **Save** button to save your changes.

To set the expiration type:



1. Click the **Expiration** tab to display the e-Signature support Expiration page.
   - By default, the **Expiration type** selection is set to **Do not use expiration** (the associated e-signature document *will not* expire).

2. To set an expiration for the associated e-signature document, select the desired option from the **Expiration type** drop-down menu:
   - **From form field** - the associated e-signature document will expire a specified number of days from the date entered in the form field selected from the **Select date field** drop-down menu.
     - Select the desired date field from the **Select date field** drop-down menu. The **Select date field** menu lists *all* date fields included in the workflow form.
     - The **Select date field** menu is shown *only* when **Select date field** is selected from the **Expiration type** menu.
   - **Dynamic, from send date** - the associated e-signature document will expire a specified number of days from the date the workflow is submitted to the designated signer.
     - The **Select date field** menu is not shown when **Dynamic, from send date** is selected from the **Expiration type** menu.

3. Enter the number of days from the selected **Expiration type** date on which the associated e-signature document will expire in the **Expired in x days** field.
   - Use the

     buttons to increase or decrease the number of cays in one-day increments.
   - The default value for the the **Expired in x days** field is 1 day.

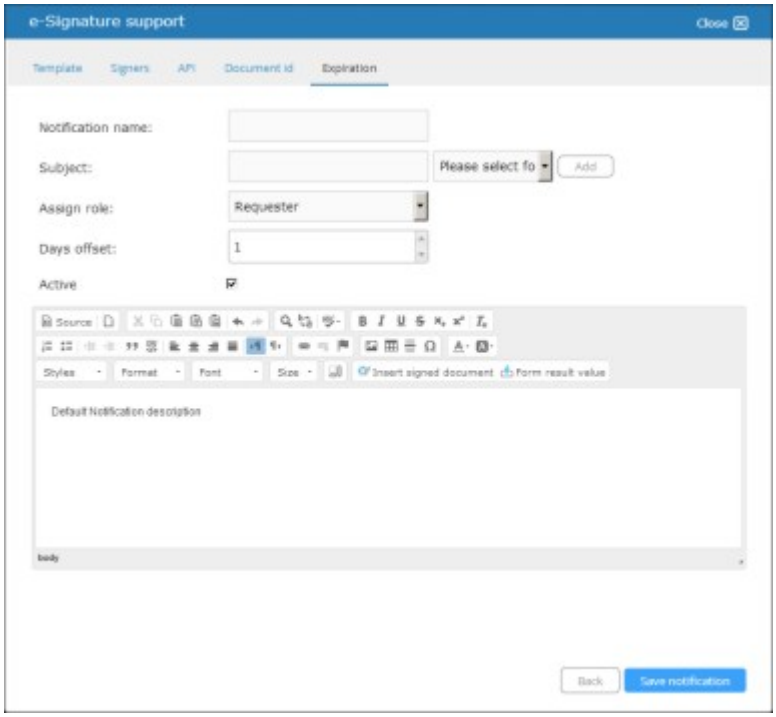
4. If desired, add an expiration notification.

5. When all desired notification options have been specified, click the **Save** button to save your changes.

To add an expiration notification:

NOTE

The Notification editor uses the Open Source CKEditor HTML editor to create the expiration notification content. Click here to find information on using the features and functions available through the CKEditor.



1. On the e-Signature support Expiration page, click the **Add notification** button.
   - The Notification editor displays.

2. Enter a name for the expiration notification in the **Notification name** text box.

3. Enter a subject for the expiration notification in the **Subject** text box.
   - To include content from *one or more* selected form fields in the expiration notification subject, select the desired field from the drop-down menu, then click the **Add** button. The name of the selected form field (e.g., **ParseError: EOF expected (click for details)**

> **Callstack:**
> **at (TAP/UserManual/How-to_Articles/E-Signature_Support_for_Relationships), /content/body/div[6]/ol/li[3]/ul/li/strong[2]/span, line 1, column 9**

) is added to the **Subject** text box at the current cursor location.

4. Select the role of the user to receive the expiration notification from the **Assign role** drop-down menu.
   - The **Assign role** menu lists *all* user roles defined for the associated workflow.

5. Use the **Days offset** menu to enter the number of days *prior to* e-signature expiration the expiration notification should be sent to the user selected from the **Assign role** menu.
   - Use the

     buttons to increase or decrease the number of cays in one-day increments.
   - The default value for the the **Days offset** field is 1 day.

6. Select the **Active** check box to enable the expiration notification.
   - The **Active** check box is selected by default.

7. Enter and format the content for the expiration notification as desired.

8. When all expiration notification content has been configured as desired, click the **Save** button to save your changes.

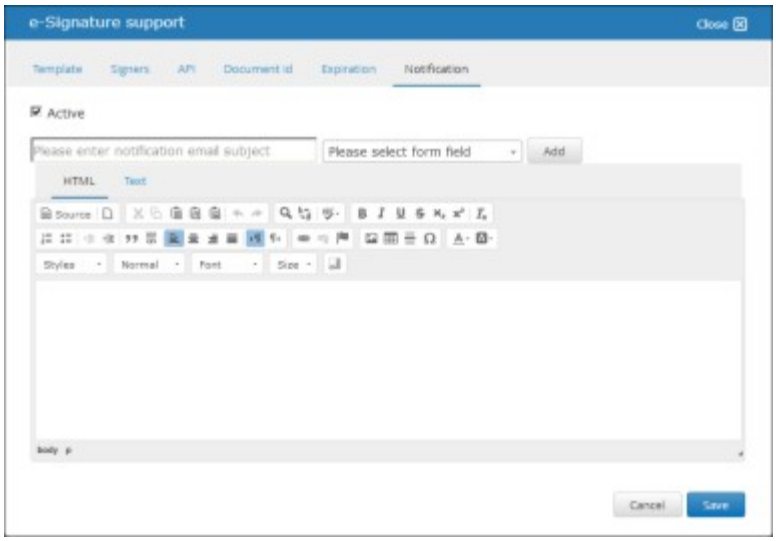
To create a custom Notification:

NOTE

The **Notification** tab is available *only* when the **Use custom notification template** check box on the API tab is selected.

NOTE

The **Notification** editor uses the Open Source CKEditor HTML editor to create the expiration notification content. Click here to find information on using the features and functions available through the CKEditor.



1. Click the **Notification** tab to display the e-Signature support Notification page.
   - The **Active** check box is selected by default.

2. Enter a subject for the notification in the **Please enter notification email subject** text box.
   - To include content from *one or more* form fields in the notification email subject:
     - Position the cursor at the desired location in the subject text.
     - Select the form field containing the content you wish to include from the **Please select form field** drop down menu.
     - Click the **Add** button.
     - Repeat as needed to add *additional* form fields.

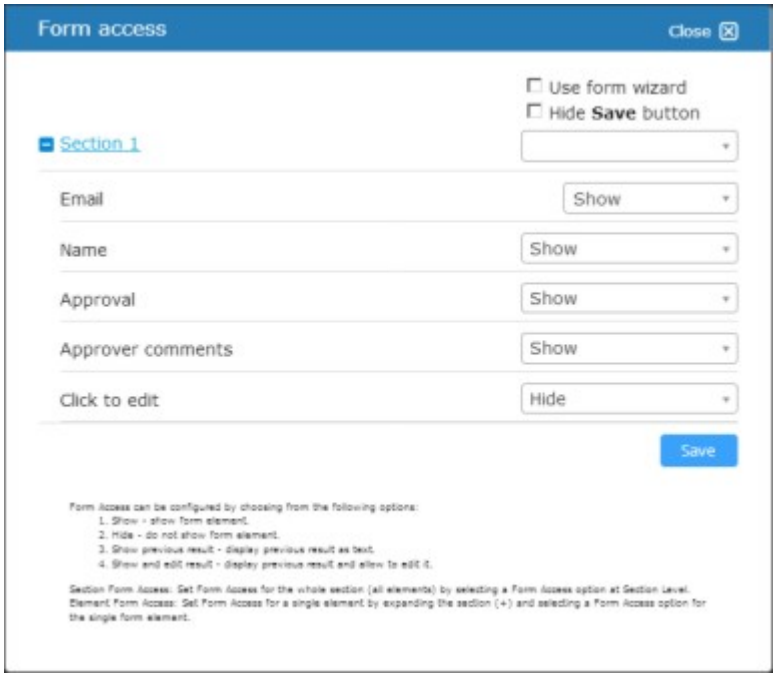
3. Enter and format the content for the Notification as desired.

4. When all Notification content has been configured as desired, click the **Save** button to save your changes.

Form Access

The **Form access** property lets you specify which form fields are displayed for a given workflow stage, and whether or not previously entered data for a displayed field is read-only or editable. You can configure form access for *all fields* contained in a given form section, or on a *field-by-field* basis.

To configure Form access for a workflow stage:



1. Select the workflow stage for which you wish to configure Form access.
2. Click the

   Form access button in the Workflow Page toolbar.
   - The Form access dialog displays. The dialog lists all sections for the associated workflow form.
     - Click the

       icon next to a section name to *expand* the section (view the form fields in the section).
     - Click the

icon next to a section name to *collapse* the section.

3. If desired, select the **User form wizard** check box to to use a form wizard to establish form access.

4. If you wish to suppress display of the **Save** button for the current stage, select the **Hide Save** button check box.
5. Use the drop-down menus associated with each section and field name to configure access for the section/field for the selected workflow stage as desired.
   - To set the *same access option* for *all* form fields in a section, use the section-level drop-down menu.
   - To set *unique access options* for *one or more* form fields, use the field-level-drop-down menus.
   - Select the desired value from the following options:
     - **Hide** - the section/form field *will not* be displayed at the associated workflow stage
     - **Show** - the section/form field *will* be displayed at the associated workflow stage, but any previously entered content *will not* be displayed
     - **Show previous result** - the section/form field *will* be displayed at the associated workflow stage, and any previously entered content *will* be displayed as "read-only"
       Show and edit result - the section/form field *will* be displayed at the associated workflow stage, and any previously entered content *will* be displayed as "editable"

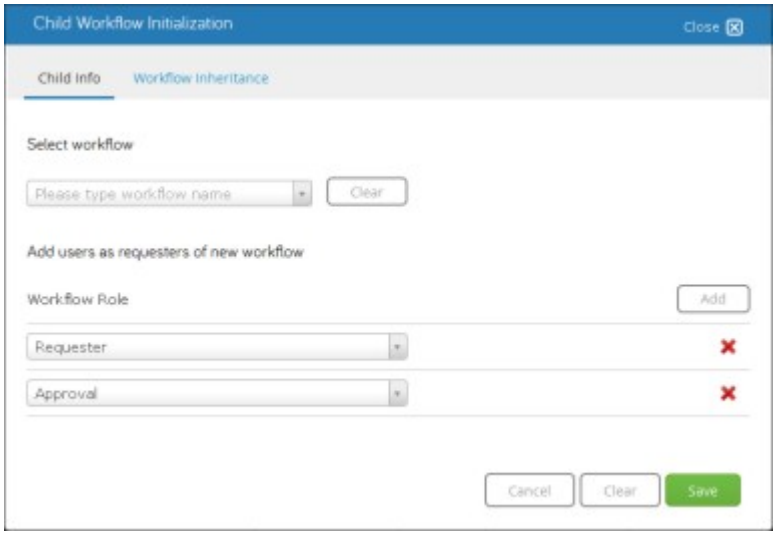
       NOTE

       If "show" access is set for *one or more* form fields in a section, *BE SURE* to set form access for the section to **Show**.
6. When form access has been configured for all sections/form fields, click the **Save** button to save your changes.

Configuring a Child Workflow

The **Child workflow** property is a relationship-level property that lets you configure a relationship to initiate a secondary (child) workflow. You can also specify values from the parent workflow to prepopulate form fields in the child workflow.

To configure a child workflow:



1. Select the workflow relationship you wish to trigger a child workflow.
2. Click the

   Child workflow button in the Workflow Page toolbar.
   - The Child Workflow Initialization dialog displays.
3. Select the **Child info** link.
   - The Child Info page displays.
4. Select the desired child workflow from the **Select workflow** menu.
   - Click the **Select workflow** menu then enter two or more characters of the workflow name. The **Select workflow** menu refreshes as you type to display the workflows that match your search term.
   - Select the desired workflow.

5. Use the **Workflow Role** menu to specify the users to be designated as requester of the child workflow.
    - The Workflow Role menu lists *all* workflow roles configured for the parent workflow. By default, the **Requester** option is selected in the **Workflow Role** menu. If desired, you can select a different workflow role.
    - To add *additional* requesters:
        - Click the **Add** button. An additional **Workflow Roles** menu displays. Select the desired workflow role.
        - To delete a requester, click the ✖ icon for the desired requester.

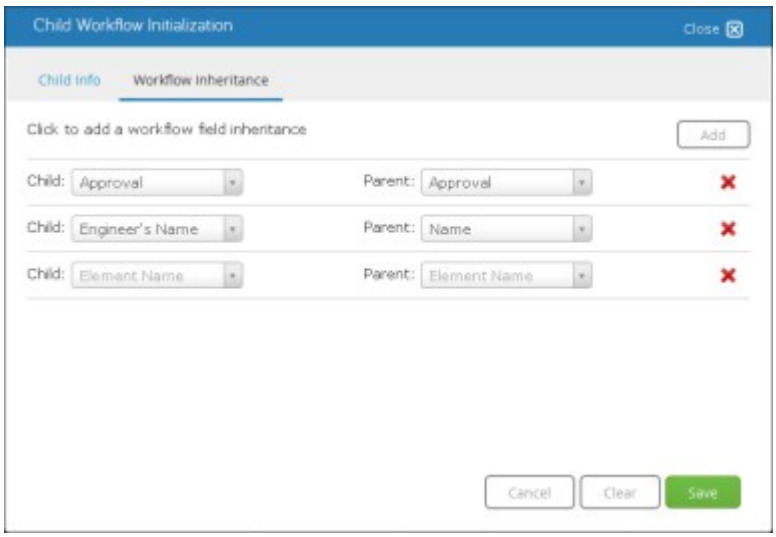
6. If desired, specify workflow field inheritance options for the child workflow.

7. When all desired options have been specified, click the **Save** button to save the child workflow.
    - The Child Workflow Initialization dialog closes, and the ⊕ symbol displays to the left of the relationship name to confirm configuration for triggering a child workflow.

To configure workflow inheritance options:

NOTE

The **Workflow inheritance** page lets you prepopulate form fields in the child workflow with content taken from fields in the parent workflow.



1. Select the **Workflow inheritance** link on the Child Workflow Initialization dialog.

- The Workflow Inheritance page displays.

2. Click the **Add** button.
   - The Workflow Inheritance entry fields display.

3. Select the child workflow field you wish to prepopulate with content from the parent workflow from the **Child** menu.

4. Select the parent workflow field containing the data to be used to prepopulate the selected child workflow field from the **Parent** menu.

5. Repeat steps **2** through 4 to configure *additional* inheritance options.
   - To delete an inheritance option, click the

     icon for the desired option.