# FormAssembly Workflow Setup

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## Introduction

The FormAssembly Workflow solution is a visual, no-code process-building interface that allows our users to combine forms, emails, integrations, and more into sequential data collection roadmaps. Workflow is a powerful tool that can help you meet your data collection needs in the following ways:

- Enable better decision-making through automated conditional routing.
- Enhance teamwork through email notifications, connector executions, and involving multiple respondents in a workflow.
- Simplify and automate business processes that require data to be collected from multiple different parties, in multiple different forms.
- Save time and money by reducing the number of cross-departmental responsibilities & tasks.

Thanks to Workflow, you can get processes rolling quickly without a need for extensive setup.

This solution is being slowly rolled out to all Enterprise and Compliance Cloud customers. Over the next several weeks, we will be progressively rolling out the new Workflow experience to customers on these plans. Keep an eye out for the “New” flag in your FormAssembly account to know when you can jump use the new Workflow solution. It is not possible to request early access - we apologize for any inconvenience.

**Please Note:**

- Workflow is currently only available on Cloud plans.
- Passing data between forms is limited by the maximum size allowed for URLs and shouldn't be used for large text fields (over 2000 characters, all fields combined).
- Workflows cannot currently be shared amongst users.
- You **must use the Workflow URL to access a workflow.** The IDs associated with the individual forms within the workflow are only associated with the forms, not the entire workflow.

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## The Workflow List Page

The Workflow List page is where all of your workflows live. You can check this page to view the name, ID, and last modified date of each Workflow in your account. You can also edit and delete your workflows here. This page can be reached by accessing your Forms List and then clicking on the "Workflow List" button in your left-side menu.

You will also notice a "V1" or "V2" in your Workflow IDs. These will let you know which version your workflow is, and will indicate whether you'll be able to use the new Workflow Builder on each individual workflow. V1 is the legacy workflow feature and V2 is the new Workflow Builder solution. You will not be able to edit V1 workflows in the new Workflow Builder.

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# The Workflow Builder

To create a new workflow, you can click the "New Workflow" button in the Workflows menu:

This will open a blank Workflow Builder. The Workflow Builder contains a number of tools that you can use to build out your workflows. Within the empty map, you will see a blue button that says “Select a Form” which you can click to start building your workflow.

**Workflow Builder Anatomy**

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## Side Navigation

The Workflow Builder has the same side navigation as the Forms List page. You can expand and collapse the side navigation with the double arrow button (>> or <<) in order to provide more space for the map, or to expand the text associated with the icons in the side navigation.

## Toolbar

The toolbar contains the following tools:

- **Workflow Title** - The default title is "Untitled Workflow". You can change the title by clicking on the title and updating the text.
- **Configuration Status Indicator** - This indicator has two states, and shows whether Steps in the workflow have been fully configured or not. Steps awaiting configuration are denoted with a yellow accent bar and an exclamation triangle icon. The two states are:
    - All Steps Configured
        - A green checkmark accompanied by the text “All Steps Configured” means that there are no further configurations needed at this time and your workflow should function as expected. You will also see

a green accent bar on the left side of all Steps.

  - Configuration Required
    - A yellow triangle with an exclamation point accompanied by the test “Configuration Required” means that there are components of the workflow that need to be configured. You will also see a yellow accent bar on the left side of the Step which requires configuration.

- **Undo and Redo** - Once changes have been made to the Workflow configuration, the Undo button is enabled. You can use this to undo previous actions. The Redo button will be disabled until an Undo event occurs, and can be used to reverse the Undo event.
- **Share** - The Share button is disabled until Steps have been added to the workflow, and the workflow has been saved. Once it is enabled, you can click the Share button to open a pop-up where you can copy the Workflow URL. **You will need this URL to test or share your workflows. The Form IDs cannot be used.**
- **Save** - The Save button is disabled until a change is first made to the workflow. Once it has been enabled, you can use this button to save your building progress. Please note that changes in the Workflow Builder are **not** automatically saved. We recommend regularly saving all updates and progress made to your workflows.

## Map

The Map is the area of the Workflow Builder where workflows are built. It is made up primarily of Steps and Paths. These create the flow diagram that illustrates the timing and order in which the Steps of the workflow will run. You can zoom in and out of the Map, and click and drag to move around as needed.

You will add your first Step using the “Select a Form” button. All other Steps in the workflow will be added using the “Add Step” button. You can also hover over the space between Steps in your workflow and the “+” icon will appear. You can read more about Workflow Steps below.

## Properties Panel

The Properties Panel is where all Step configuration is completed. This panel slides out from the right side of the screen, next to the Map. You can open the Properties Panel by either adding a new Step or clicking on a specific Step. You can also close this panel by clicking the "X" in the top-right corner.

The Properties Panel comes with a number of tabs that you can use to configure your Steps. This is also where you can delete Steps in your workflow. Click on the Step you wish to delete, then click on the red "Delete" button at the bottom of the Properties Panel. Every Step, with the exception of the first Step, can be deleted.

You can view the documentation for each Step in order to learn more about the available properties tabs.

# Workflow Step Types

As you build your workflow, you'll want to add Steps. Steps contain the action or activity which your respondent will experience at this point in their journey. Below is a list of each available Step:

- **Start Workflow/Select a Form** - The first form in a workflow is considered the Start Workflow Step. You will start your Workflow by adding a form. You cannot delete this Step. However, if you added a form here by mistake then you can click the Undo button to take you back to a blank Map.
- **Form** - A Form Step represents a form view and response collection activity from a respondent. You can learn more here.
- **Conditional** - Allows for automated decision-making to take place in a workflow. You can learn more here.
- **Email** - An Email Step represents an activity in a workflow in which an email is sent to one or more recipients. You can learn more here.
- **Go to Step** - Direct the workflow to a previous or future Step, or even to a Step on another path. You can learn more here.
- **Connector** - Add a FormAssembly Connector to the workflow. You can learn more here.
- **Page Redirect** -Redirect respondents to a Thank You page or an external page using a URL. You can learn more here.

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# Embedding a Workflow

### The Workflow URL

This URL can be copied from the Share button and is needed in order to launch your workflows. This is because the individual URLs for your forms will still only bring your respondent to that specific form. Because of this, **you must use the Workflow URL to share/access the workflow**. **The first form's URL will not launch a workflow**. This allows you to have one form in multiple workflows without any of them conflicting.

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### Using an iFrame

To publish your workflow within an iFrame, use the standard FormAssembly iFrame code and replace "" below with your Workflow URL:

## Feedback

# FormAssembly Workflow Feedback

Please use this form to submit feedback regarding your experience with FormAssembly Workflow or submit a Workflow feature or improvement request.

First Name

Last Name

FormAssembly Username or Email Address *

How are you currently using Workflow?

What type of request would you like to submit? *

- Workflow Feature or Improvement Request
- Report Feedback or an Issue with Workflow

**Workflow Feedback or Issue**

Feedback Topic

Please select...

Other Topic

Upload an Image or Screenshot

Choose File No file selected