

## Building a Workflow in Identifi – The Basics

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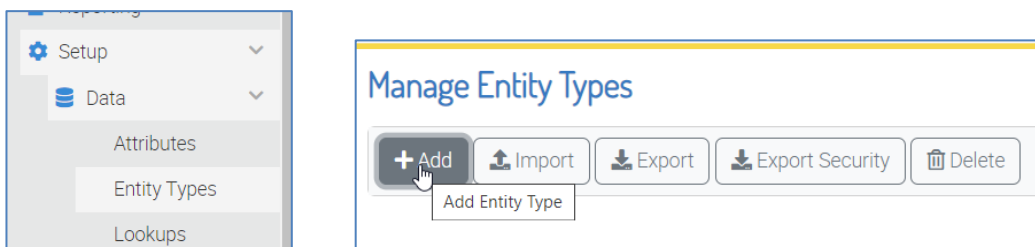
## Create an Entity for the Workflow Plan

Each Workflow requires its own Entity Type, which is where the data for the workflow will be stored.

**Note:** It is recommended to create a new Entity for each new workflow plan; existing Entities that house the Core data coming into Identifi from your host system should remain untouched, as it may impact your Business Line Integration and could affect the functionality of other processes and features.

To create a new Entity Type:

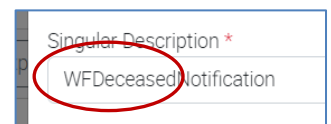
Under **Setup -> Data -> Entity Types**, click "Add" from the menu at the top.



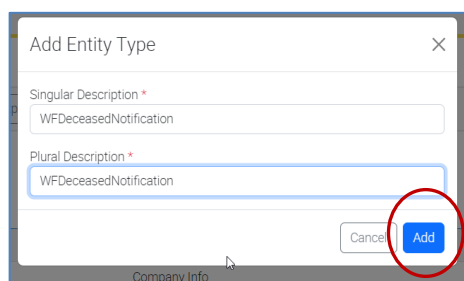
Give the Entity Type a Singular and Plural Description (they can be the same).

*Note: These can be typed with or without spaces in between, as the system will automatically remove the spaces in the internal name.*

**Note:** Since this new Entity Type will be used specifically for a Workflow, it is recommended that the Entity Type Name begin with "WF" to distinguish it from other Entity Types.



Click the **Add** button.



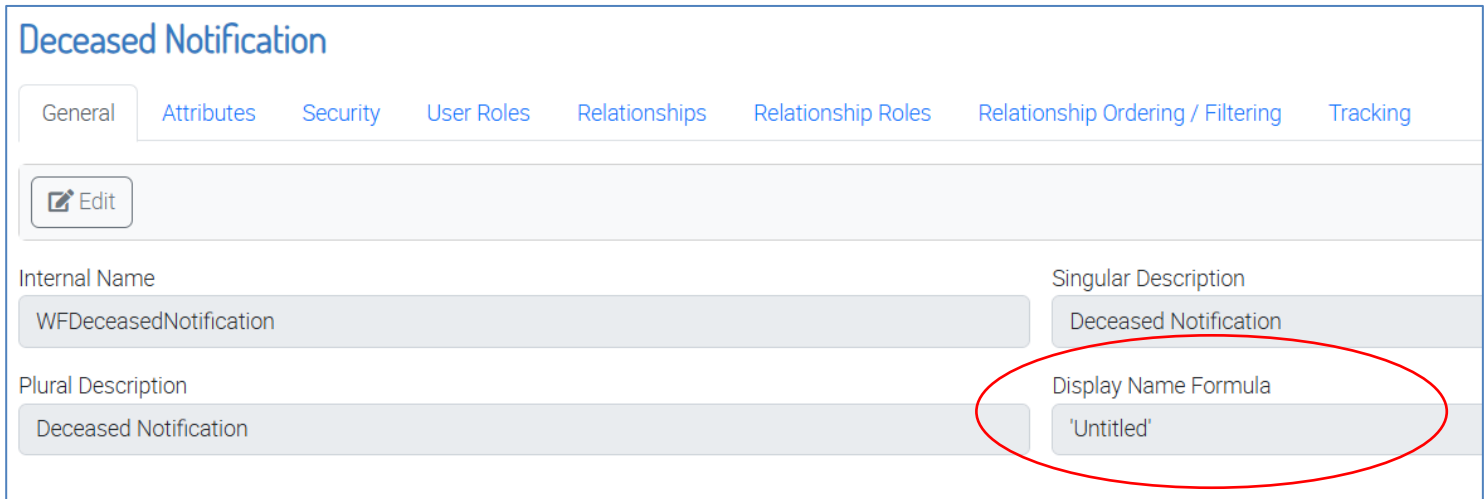
Once created, the Entity will open and the Singular and Plural Descriptions can now be edited.

Click the **Edit** button on the General tab.

- The **Internal Name** cannot be edited.
- Edit the **Singular** and **Plural Descriptions** to remove the "WF" from the beginning and add spaces for clarity.

**Display Name Formula** determines what will be displayed as the name of the Workflow Item. If no formula is defined, the Work Item will display as “Untitled.”

**Note: Before creating the Display Name Formula, be sure your Attributes exist within the Workflow Entity, or an error message will pop up.** (See [Add a New Attribute within the Workflow Entity.](#))



**Deceased Notification**

General | **Attributes** | Security | User Roles | Relationships | Relationship Roles | Relationship Ordering / Filtering | Tracking

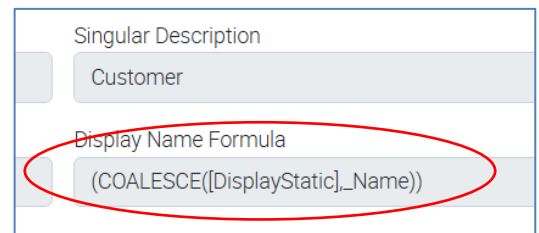
[Edit](#)

Internal Name	WFDeceasedNotification	Singular Description	Deceased Notification
Plural Description	Deceased Notification	Display Name Formula	'Untitled'

The easiest way to input the formula is to copy an existing formula from an Entity that displays the type of Name you want to display in your Workflow Plan items.

For example, if the Customer’s name would be the desired Display Name on the Workflow Items (and “Name” is an Attribute within the Entity), then the Display Name Formula from the Customer Entity could be copied.

**\*\*\*NOTE: Be especially mindful not to change anything within the Source Entity. Only use it to copy the field.\*\*\***



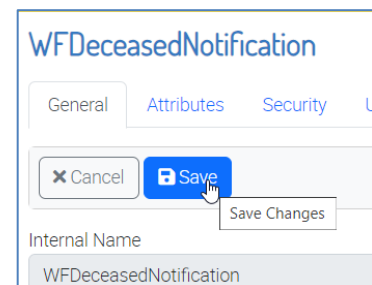
Singular Description

Customer

Display Name Formula

(COALESCE([DisplayStatic]\_Name))

- Once all fields are addressed, click **Save** to save changes.



**WFDeceasedNotification**

General | **Attributes** | Security | U

[Cancel](#) [Save](#) [Save Changes](#)

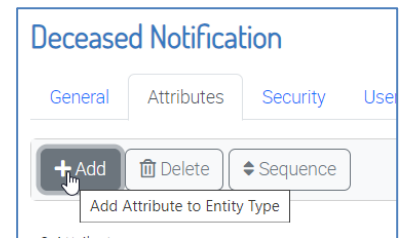
Internal Name

WFDeceasedNotification

## Determine the Workflow Plan’s General Keys

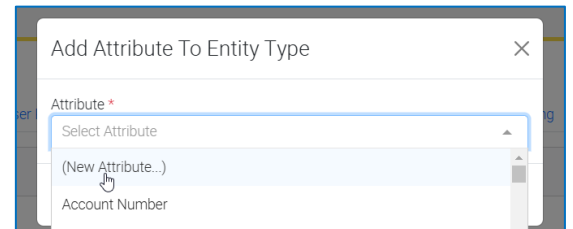
Now that the Entity Type has been created, the next thing to consider is **what are the attributes that will be unique and can be used to distinguish the Workflow item?** The answer to this question will determine which of the Entity Attributes will be assigned as **General Key(s)** in the Workflow Plan.

Click on the **Attributes** Tab within the Entity to add the Attributes to be used in the Workflow (additional attributes can be added). Any attribute that currently exists within the installation can be used, or new attributes can be created. If using an existing attribute, click **Add** and select the Attribute(s) from the dropdown menu.

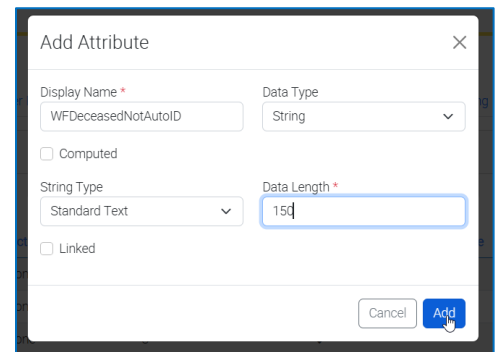


### Creating a New Attribute:

Select “**(New Attribute)**” at the top of the dropdown menu.

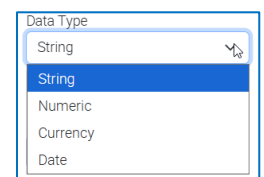


Assign a **Display Name** to the Attribute you are creating. If it will be an AutoID, it is recommended to name it according to the Workflow Entity for clarity. *Note: The Attribute Display Name can be typed with or without spaces, as the system will remove spaces for the internal name.*



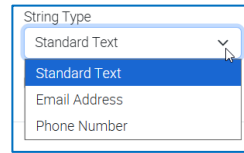
Placing a checkmark next to **Computed** will allow the attribute to use a computed formula to automatically populate its value. It must be marked here for the field to be available later. The formula is entered at the Application level- see this article for details on how this works: [How to use a Computed Attribute.](#)

**Data Type** will default to *String* and *Standard Text* Type, which will allow for both numerical and alphabetical characters. (NOTE: Choose String if representing percentages using a decimal point.) Other options include *Numeric*, *Currency* and *Date*.



Select **Numeric** if the new attribute's values will be only numbers (*Note: Numeric does not allow the use of a decimal point*), **Currency** if the values will be dollar amounts and **Date** if the values will be calendar dates.

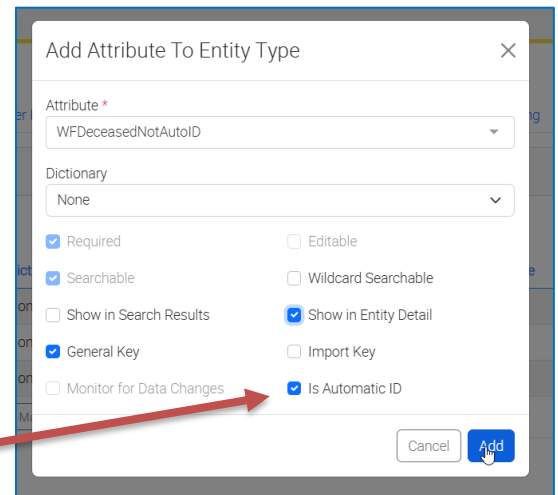
Other String Type options are *email address* or *phone number*.



**Data Length** refers to the number of characters allowed for this Attribute. How many characters will the attribute's values equal? Over-estimating is better than under-estimating, as once Data Length is set, you can increase the number but not reduce it.

If the attribute will be a General Key, indicate it here by selecting the **“General Key”** toggle box. This will also automatically select **“Required”** and **“Searchable.”**

*Note: as of version 24.1, an Automatic ID can be assigned to each individual workflow by toggling the “Is Automatic ID” box. A unique attribute will be assigned, eliminating the need for additional General keys. If additional General Keys are added, they will be automatically added to the Start Form within the workflow and will be required.*



For this sample workflow (Deceased Notification processing), the Auto ID Attribute will be the General Key but also **Date of Death** and **Name** have been designated as General Keys. The AutoID is sufficient, as it is not necessary to have additional General Keys. General Keys are automatically added to the Start Form when the Workflow is kicked off.

Once the General Keys have been created, and any additional attributes have been selected, the Workflow Plan can be built.

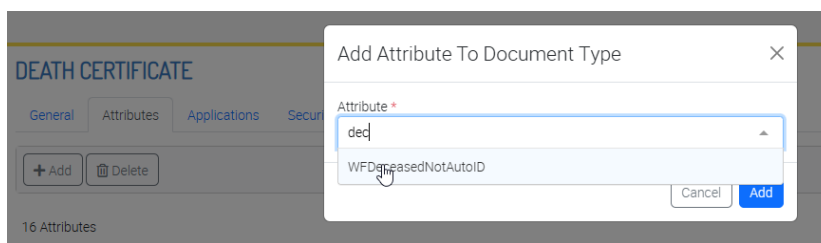
Name	ID	Data Type	Dictionary	Sequence	Required	Editable	Searchable	Wildcard Searchable	Search Results	Detail	General Key	Import Key	Monitor for Changes
Name	34	String (175)	None	1	✓		✓				✓		
Date of Death	111	DateTime	None	2	✓		✓				✓		
WFDeceasedNotAutoID	121	String (150)	None	5	✓		✓			✓	✓		
Address 1	3	String (100)	None	3			✓						
Resident	120	String (3)	Manual	4			✓						

## Determine how the Workflow Will Start (document vs. with a form)

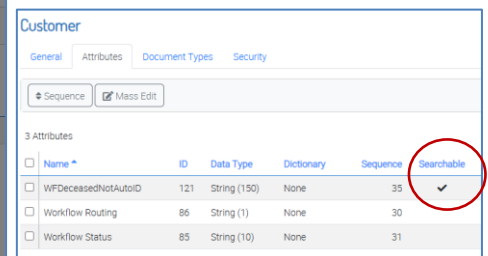
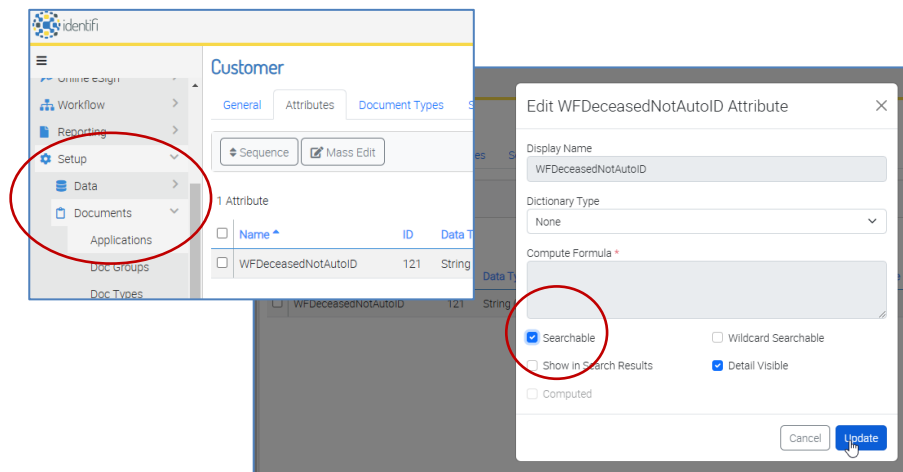
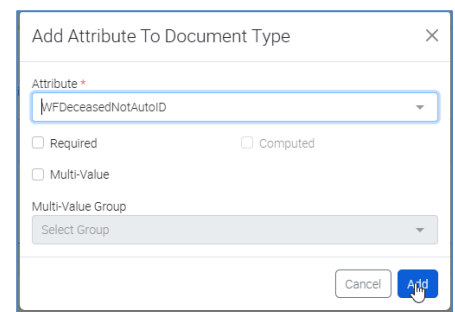
Workflows can be started in one of two ways:

1. **When a document arrives** in the Identifi document repository. Whether scanned, Added or electronically signed, when the document is stored to Identifi, the Workflow will start.

**Note:** Be certain that the General Key Attributes have been assigned to the Document Type AND that the Attributes are designated as "Searchable" within the Application. This is true for any document type that will be made visible within the Workflow steps.

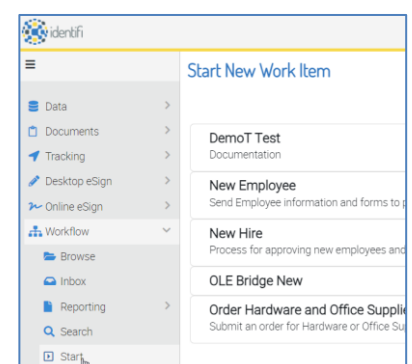


Add the attribute. "Required" and "Multi-Value" can remain unchecked.



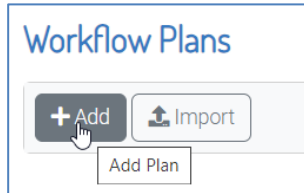
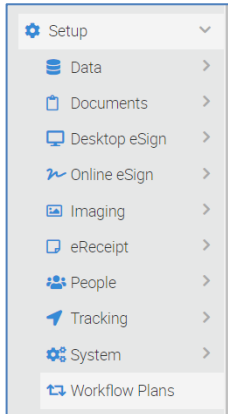
2. When a User selects **Start** from the **Workflow->Start** menu. This will open a form to be completed by the User that initiates the Workflow.

**Note:** A User will only see the Workflow Plans to which they have been granted visibility.

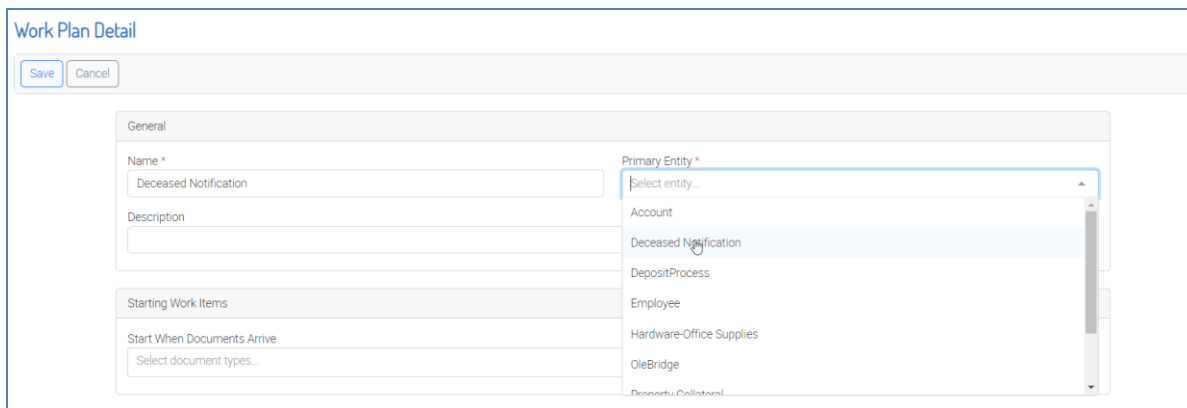


## Create the Workflow Plan

Navigate to **Setup->Workflow Plans** and click on the **Add** button.



Within the **Work Plan Detail** screen, complete all required (\*) fields.



- **General**

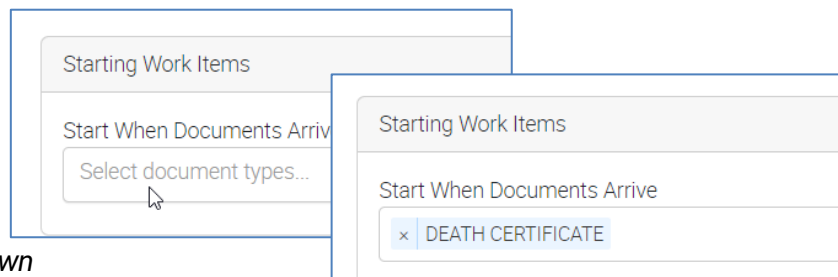
- **Name:** Assign a name to this Workflow Plan
- **Primary Entity** Choose the Entity created specifically for this Workflow.  
*Note: Once selected, the Primary Entity cannot be changed.*
- **Description:** If the Workflow begins manually with a form, it is recommended to enter a description to distinguish it from other Workflows.

- **Starting Work Items** – If the workflow will begin when a document arrives in Identifi, choose the document from the dropdown menu.

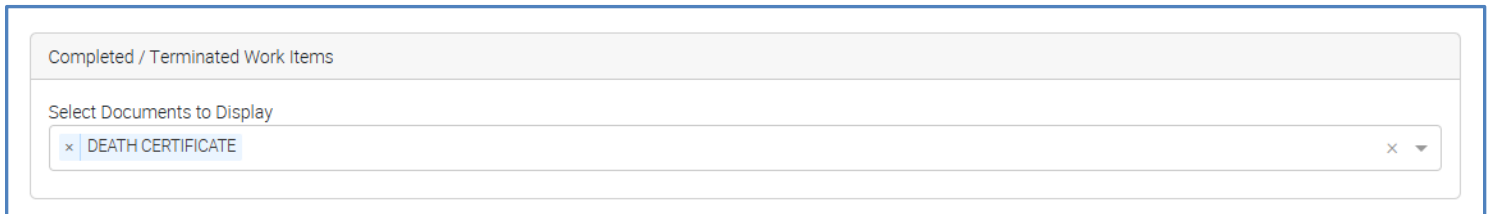
**Reminder:** As stated [above](#), for the

Document Type to be available in the drop-down

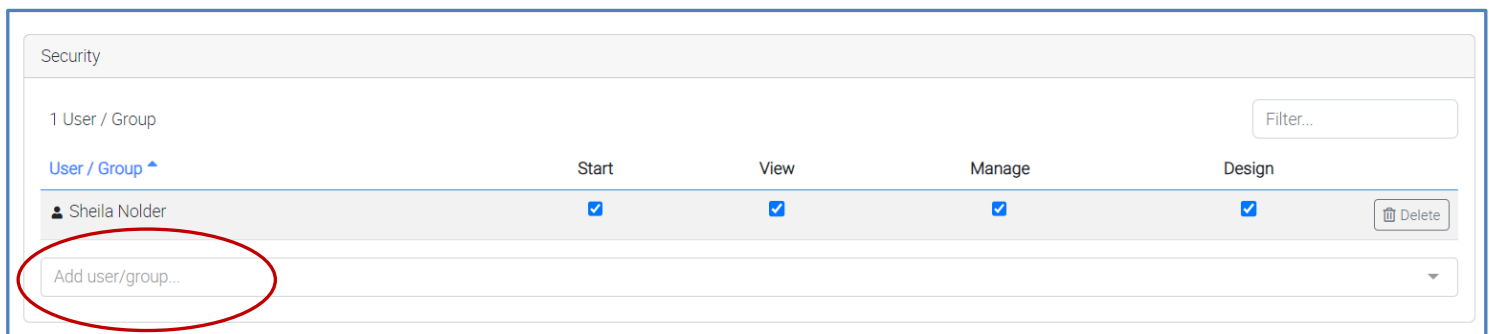
menu, the **General Keys** must (1) be an Attribute on the document type AND (2) must be made Searchable within the Application to which the Document Type belongs.



- **Completed/Terminated Work Items** – List any Documents to display once the work item has been completed or terminated. If this is not defined, any/all documents within the Application that meet the set Attribute criteria will be displayed.

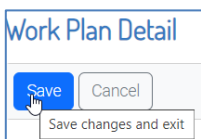


- **Security** – The system will automatically assign full permissions to the User creating the Workflow Plan. Additional Users/Groups can be added to the Workflow Plan and granted permission as follows:



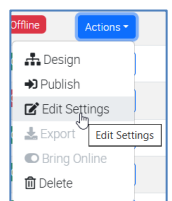
### Workflow Plan Permissions:

- **Start** allows the person to start the Workflow from the Workflow->Start menu;
- **View** allows them to see items in the Workflow Plan and to use the Search function.
- **Manage** allows for the User to Browse work items and reassign and terminate work items.
- **Design** gives access to the Designer Canvas to make edits to the Workflow Plan and Steps.



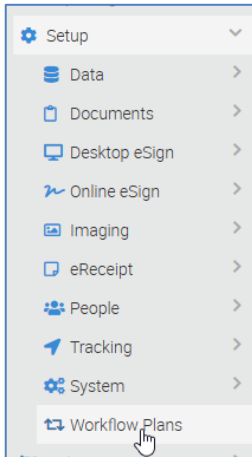
Click **Save** at the top to save changes to the Workflow Plan and exit.

To return to the Workplan Details screen, select **"Edit Settings"** from the Actions menu on the Workflow Plan.





The newly created plan will be visible within the list of Workflow Plans under Setup and is ready to design.

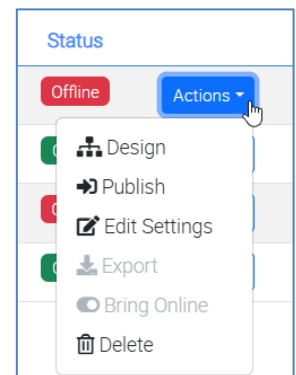


Workflow Plans			
+ Add		Import	
8 Workflow Plans			
Plan	Primary Entity	Last Published	Status
Deceased Notification	Deceased Notification		Offline Actions
DemoTTest	Employee	1/17/2025 12:33 PM	Online Actions

**Note:** At the beginning, the plan is displayed as “Offline” because steps and actions must be built. It will be Online once published.

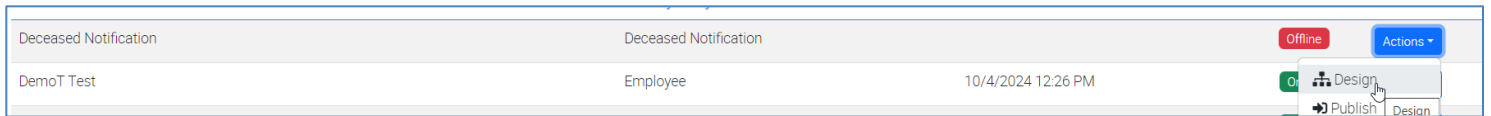
Click the **Actions** button to begin designing.

- **Design** – opens the Designer to create/edit/manage the Workflow steps and actions.
- **Publish** – must be clicked after any changes have been made or they will not be visible.
- **Edit Settings** – opens the Work Plan Detail screen to edit security, add additional documents that will start the workflow, add additional documents to show when a work item is completed or terminated or other details.
- **Export** – allows export of this workflow plan which can then be imported. (Used infrequently.)
- **Bring online** will be visible once the plan is published. This can be toggled between Take Offline and Bring Online as needed.
- **Delete** – deletes the plan.

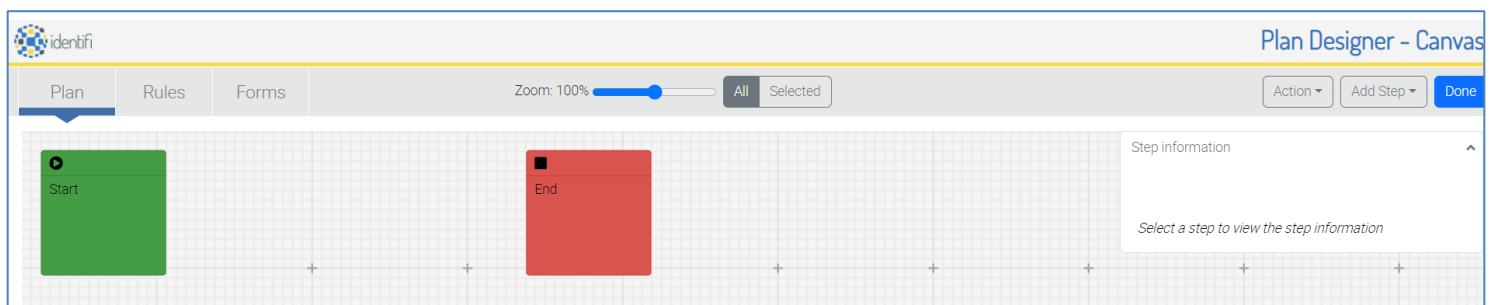


## Add Workflow Steps

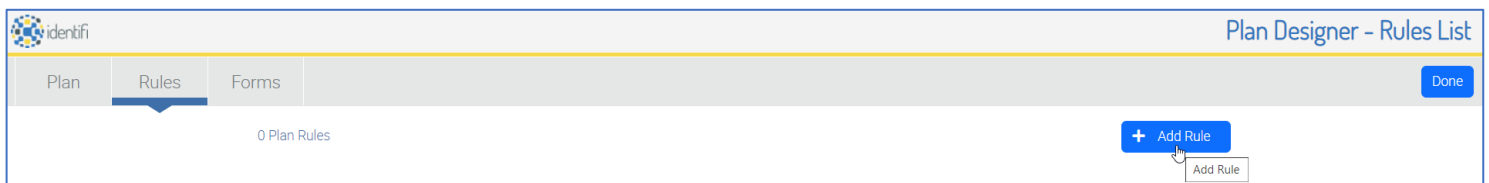
Under the Actions menu, click **Design**.



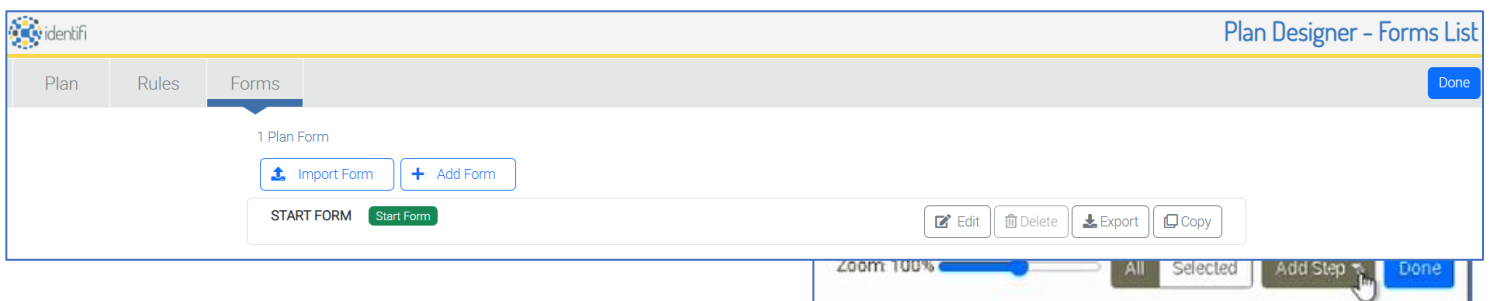
This will open the **Plan Design – Canvas**, and when it opens, it defaults to the “Plan” tab. The **Start** and **End** steps have been provided, but the rest of the plan steps must be created in relation to these two steps.



The other two available tabs are the “**Rules**” tab, where rules to route items/steps can be developed. See [Working with Rules](#) for additional information.



The “**Forms**” tab displays the forms to be used within the Workflow steps. Forms determine what information is collected and presented at each step, and a form will be required for each step created in the Workflow Plan. Multiple forms can be created or only can be used for each step, depending on the specific Workflow. (See [Working with Forms](#).)



## Adding an INTERNAL USER STEP

Click on **Add Step** in the top, right corner of the Plan Designer Canvas and choose the type of step to be added.

**(Note: In the example Workflow for this guide, Internal User steps will be used to route the document to each department for review.)**

### Internal User Step Properties

Appearance

Name \*

Provide a unique name for the step (50 char max)

Instructions

Please review the Death Certificate and confirm all information is correct. Click 'Confirm.'

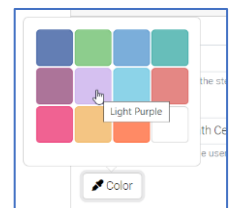
Instructions displayed to the user when working with this step

Color

Preview

RETAIL REVIEW

- **Appearance** field determines how the step will appear in the Plan Designer.
  - **Name** – Name the step
  - **Instructions** – these will be the instructions to the User who opens/processes the workflow step.
  - **Assign a color to the step** – this can be based on a department (certain color per department), or color by certain rules so those steps with Rules are easily identified. White tends to blend into the background, so choose some sort of color, even if it's random.



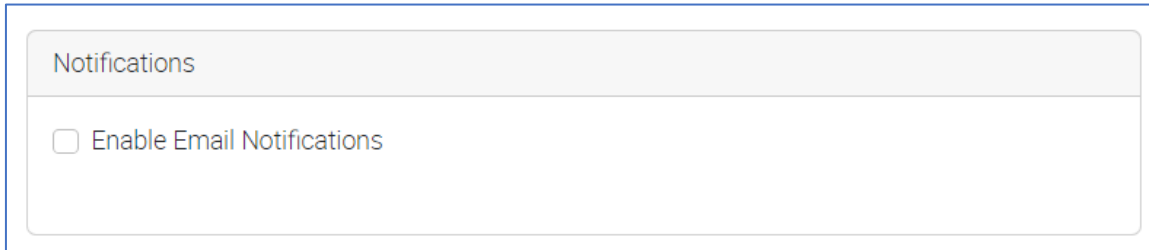
- **Form** - This is the form that will be seen on the screen when the WF Item is opened. At this point, the Start Form has been created for the Workflow Plan. Additional forms can be designed and assigned to each step.

Form

(None) ▼

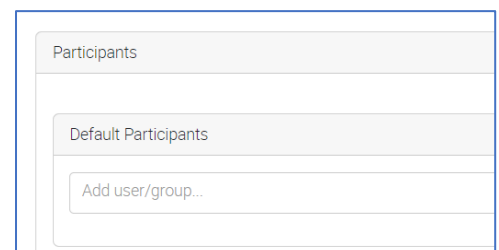
- **Notifications** –This will send an email to the User/Group assigned to the step. Until the plan is ready for testing, it is recommended to leave this unchecked.

*Note: the notification setting is ignored if two consecutive steps go to the same user.*

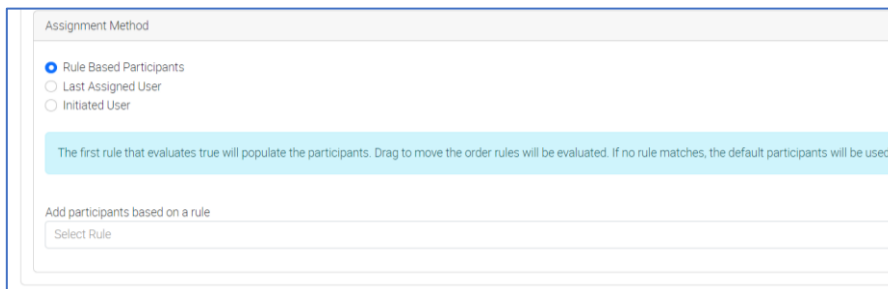


- **Participants**

- Choose the User(s)/Group(s) who will be the **Default Participants** on this step. At least one default user must be assigned.



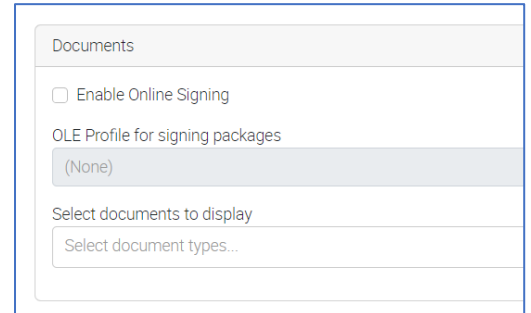
- Choose the **Assignment Method**:



- **Rule-Based Participants** is the default. This allows the builder of the workflow to decide who gets what based on a rule (if it's for this department, it goes to this person, for example).
- **Last Assigned User** will send it to the user last assigned when it came through. If it comes through this step again for whatever reason, the last person who touched it will get it.
- **Initiated User** will send it back to the person who initiated the Start of the WF (either using the Start function or by adding the document to Identifi).
- Add Participants based on a Rule - Click the radio button by Rule Based Participants and select the Rule from the dropdown. \*See [Creating Rules for Workflow Plans](#).

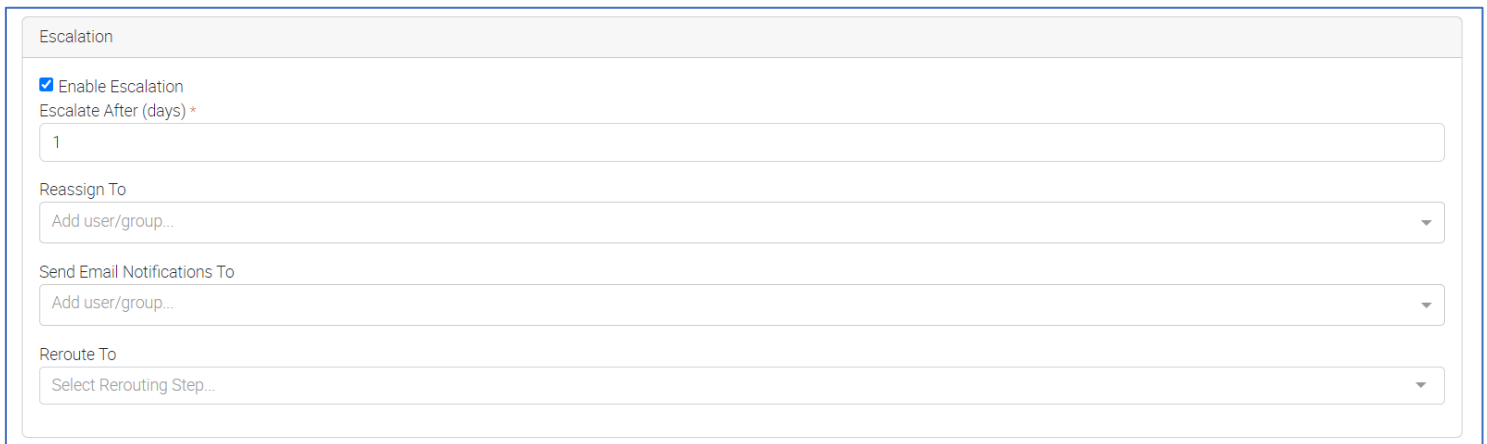
- **Documents**

- If **Online eSign** will be used in the Workflow step, toggle the option here and choose the appropriate Profile. (**Note:** Profiles are created within **Setup->Online eSign->Profiles** and direct the documents to the appropriate Application within Identifi.)
- If documents will be visible on the Workflow step, select which documents to display from the drop-down menu.



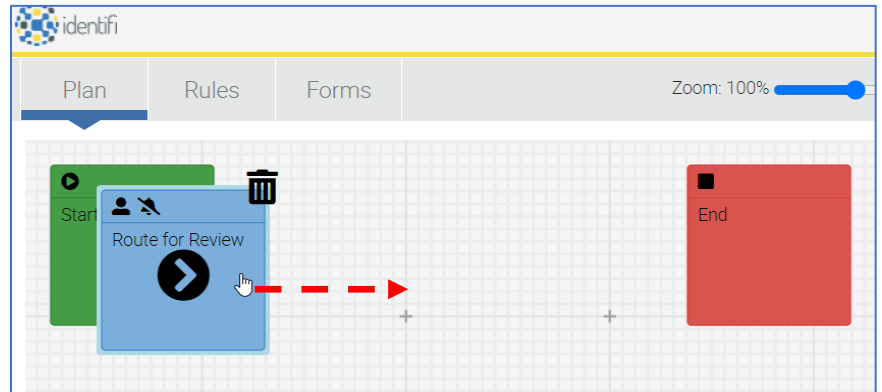
*(Note: For Document Types to be listed here in the drop-down menu, the Document Types must have the General Key Attributes AND the Attributes must be searchable within the Application.)*

- **Escalation** – toggle this on to allow escalation to be set on the step, meaning if something sits in a step for too long, it can be re-routed and/or an email notification sent to a manager and/or someone else. (*Not typically checked at the beginning, when the WF is being set up.*)




After all sections have been completed, click **“Save”** to add the step to the Designer Canvas.

The step shows up in the Designer Canvas on top of the Start Step. Click the new step and drag it to its desired location.



Continue adding steps to the Workflow as needed. The following are various types of steps that can be created within a Workflow. Note that a new step will always come into the Workflow Canvas on top of the Start step and will need to be moved.

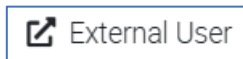
### Types of Workflow Steps:

- **INTERNAL USER STEP**



(most widely used) Routes the step to an internal user and requires some type of action on that step. (See [Add an Internal User Step](#), above.)

- **EXTERNAL USER STEP**



Produces an email to an external user and can be used to complete a form and/or the addition of documents that will return to be stored within Identifi.



**(Note: this step requires that an additional URL be created and would incur an additional charge for the creation of that URL.)**

- **Appearance** fields determine what the user will see at the top of the step when the step is being worked, as well as how the step will appear in the Plan Designer.

Appearance

Name \*


Provide a unique name for the step (50 char max)

Instructions

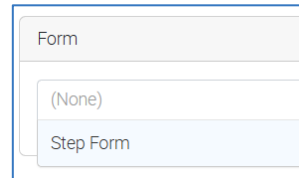
Instructions displayed to the user when working with this step

Color

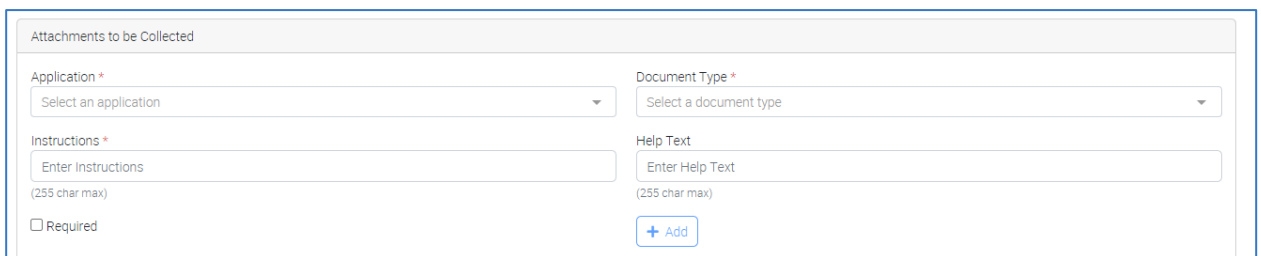
Preview



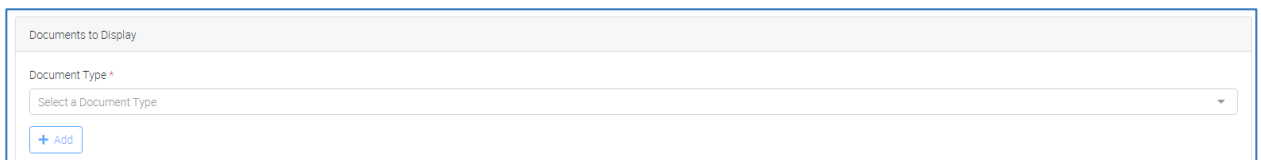
- **Form** - select the appropriate Form.



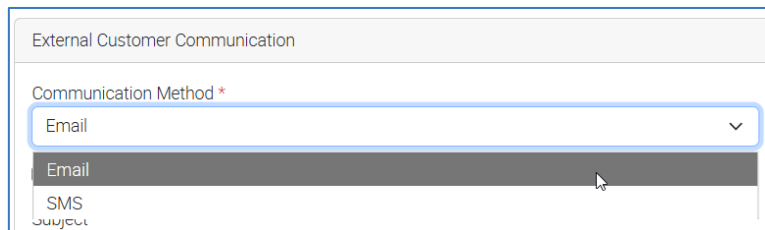
- **Attachments to be Collected** fields allow for the External Users to return attach a document as part of the step. Begin by selecting the Application, followed by the Document Type. The *Instructions* field is required, *Help Text* is optional. As in Internal Steps, these documents are automatically added to the archive. Click **+Add** to add additional Document Types.



- **Documents to Display** fields allow for a document to accompany the work item and display for the External User.  
Click **+Add** to add additional Document Types.

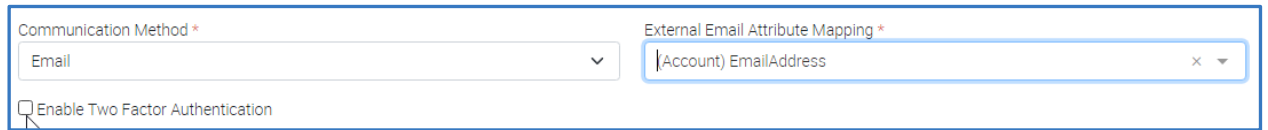


- In the **External Customer Communication** area, users will determine how the item is sent to the external participant: Select the Communication Method (email or SMS).

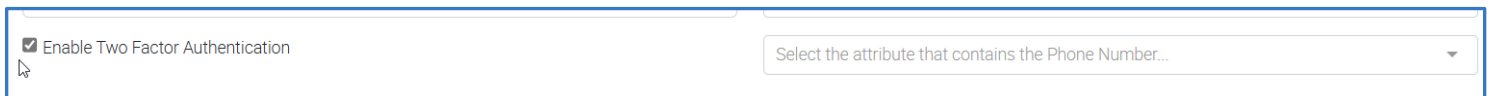


## Communication Method: email

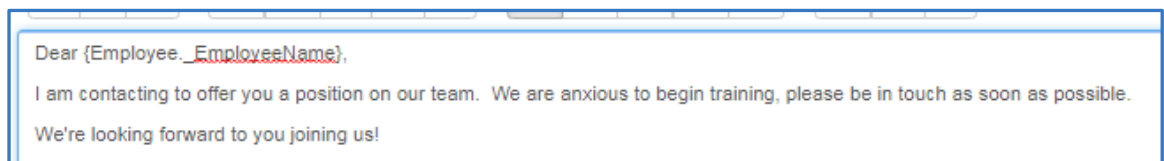
- **Email:** Choose *Email* and then select the appropriate email attribute from the dropdown.



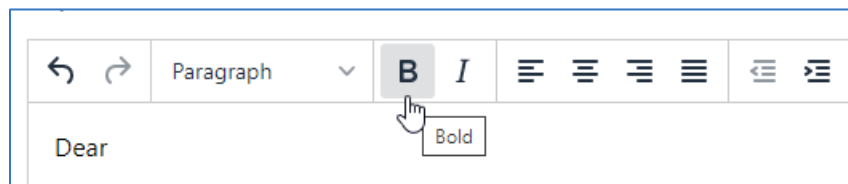
Check the box to **'Enable Two Factor Authentication'** and then select the appropriate phone number attribute from the dropdown that appears. When the recipient of the work item clicks the link to load the web form, a text message will be sent and they will be prompted to enter it correctly before they are able to access the item.



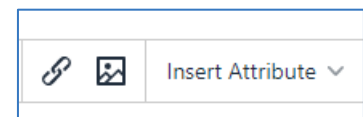
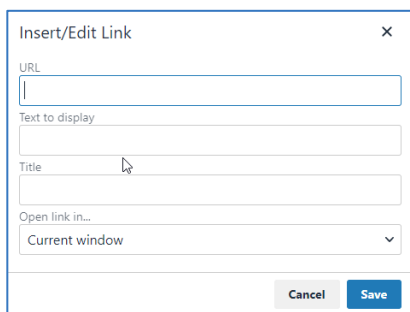
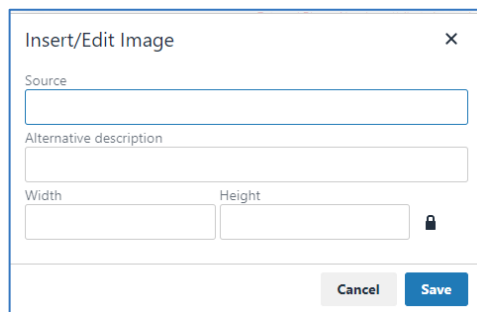
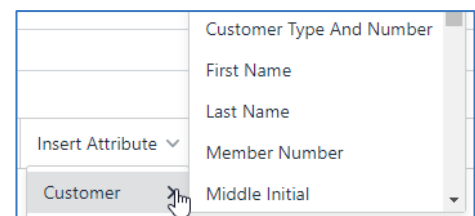
Then enter the Subject and Body of the email that the External User will receive.



Rich Text Formatting available.



Insert links, images and **attribute placeholders** in the message.



## Communication Method: SMS

- o **SMS:** Choose SMS and then select the appropriate phone number attribute from the drop-down.

Communication Method *	External Phone Number Attribute Mapping *
SMS	(Account) PhoneNumber

Enter the content of the text message that the External User will receive.

Insert Attribute ▾

Dear Customer, Your {Account.\_AccountType} needs your attention. Please log onto your Online Banking to review.

Insert an **attribute placeholder** to include in the message.

Please be aware th  
to send. Current le

Insert Attribute ▾

Account >

- Major Type
- Maturity Date
- Minor Type
- Officer Number
- Open Date

- **EMAIL STEP**



will trigger a form letter style email.

### Email Step Properties

**Appearance**

Name \*

Provide a unique name for the step (30 char max)

Color

Preview

**Recipients**

Recipients

Select user(s) or group(s)

External Recipients

Enter email addresses...

Type an email address and press the Enter key to add it to the list.

Attribute Mapped Recipients

Select the attribute(s) that contain the email addresses...

Send Email to Initiator

**Email**

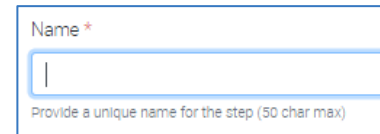
Subject

Subject line sent in email

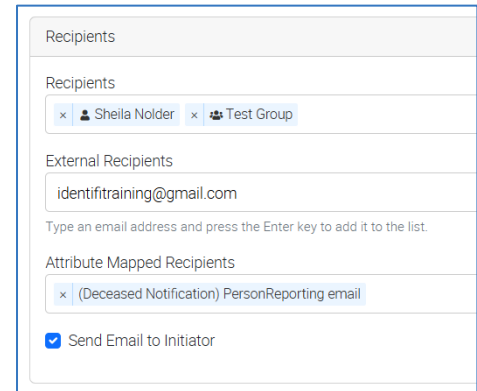
Paragraph ▾ B I

Insert Attribute ▾

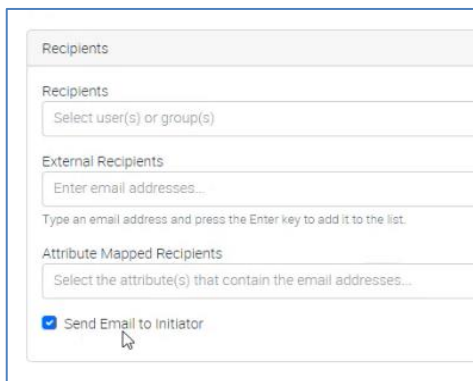
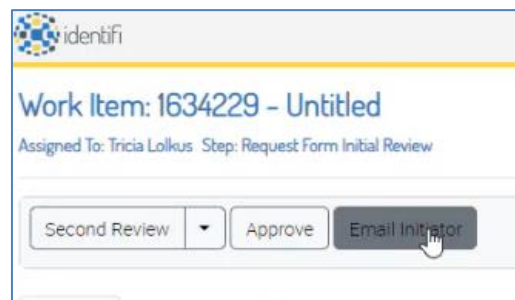
- **Appearance** fields allow the user to give the step a Name, color and an icon.



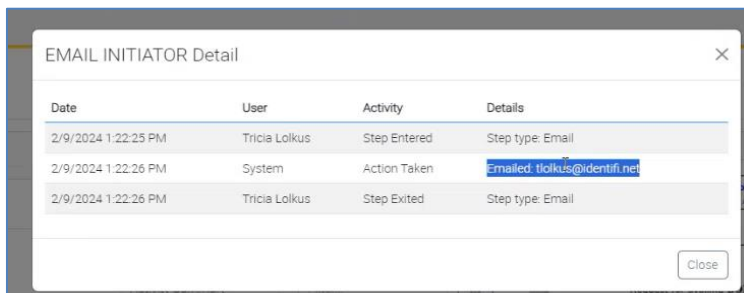
- **Add Recipients by:**
  - Selecting other Identifi Users under Recipients
  - Entering email addresses under External Recipients
  - And/or selecting email address attributes from the associated Entity under *Attribute Mapped Recipients*.



**Send email to Initiator:** This option within the Email Step Properties can be enabled to allow an email to be sent to the initiator of the Workflow item, in addition to any designated Users and/or Groups listed within that step.

EMAIL INITIATOR	Emailed (System)
REQUEST FORM INITIAL REVIEW	In Progress... (Tricia Lolkus)



Date	User	Activity	Details
2/9/2024 1:22:25 PM	Tricia Lolkus	Step Entered	Step type: Email
2/9/2024 1:22:26 PM	System	Action Taken	Emailed: tlolkus@identifi.net
2/9/2024 1:22:26 PM	Tricia Lolkus	Step Exited	Step type: Email

- Finally, enter the Subject and Body of the **Email**. Rich Text formatting available.

Use **Insert Attribute** to add attribute data to the email.


- **SMS STEP**  will trigger a text message to a mobile phone.

### SMS Step Properties

**Appearance**

Name \*

Provide a unique name for the step (50 char max)

 Color

**Recipients**

Attribute Containing Recipient Phone Number \*

Select the attribute(s) that contain the Phone Number...

**Message**

Please be aware that messages over 160 characters may be segmented into multiple messages based on the carrier. Also any message over 1600 characters will fail to send. **Current length:** 0.

Insert Attribute ▾

- **Appearance** fields allow the user to give the step a Name, color and an icon.

- Add **Recipient's Phone Number** by selecting the appropriate attribute from the drop-down list:
- Finally, enter the content of the **Message**.

Recipients

Attribute Containing Recipient Phone Number \*

Select the attribute(s) that contain the Phone Number...

Message

Please be aware that messages over 160 characters may be segmented into multiple messages based on the carrier. Also any message over 1600 characters will fail to send. Current length: 129.

Insert Attribute ▾

Hello, Your {Account\_AccountType} account requires attention. Please log onto your Safety Harbor Bank Online Banking to review,

Use **Insert Attribute** to add attribute data to the email.

Insert Attribute ▾

- Address 1
- Date of Death
- Name
- PersonReporting email
- PersonReporting Name
- Resident
- State of Residence
- WFDeceasedNotAutoID

Deceased Notification >

Deceased Notification

- INTEGRATION STEP**



The Integration Step is an advanced feature of Workflow that provides users with the ability to execute custom code which can only be developed by the Identifi Professional Services team.

Typically, custom programs are built to perform a specific function which cannot be performed within the Product itself. Some examples of this are: updating Entity Data that is outside of Workflow, Logging data in a custom table that can then be used to integrate with a third-party system etc.

**Note:** This step requires contacting Identifi for set up and would incur an additional charge.

To use the Integration Step, the Identifi Professional Services team must be engaged to build a custom program to meet the customer’s needs. This engagement will incur additional fees.

Once the custom program is developed and deployed to the installation it will be available to configure. After adding the Integration Step to the plan, the custom component should be selectable.

### Integration Step Properties

Appearance

Name \*

Provide a unique name for the step (50 char max)

Color

**Note:** Integration Steps happen automatically, so do not require instructions.

Preview

⇌

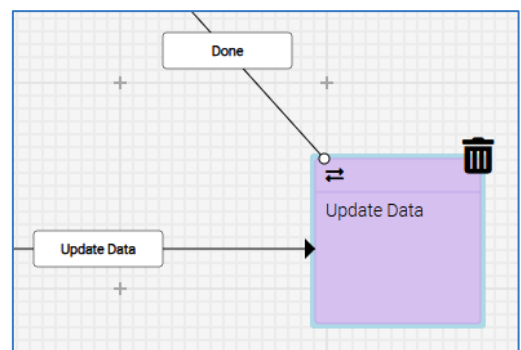
UPDATE DATA

Integration Component

Integration\_throw\_exception

**Integration Components** are specially configured entity attributes. Select the appropriate one for the step being created.

When a work item passes through an integration step, the custom program will be triggered and upon successful completion, the work item will be passed to the next step in the plan.

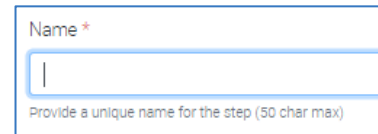


- **START WORKFLOW STEP**



Actions taken from a step of this type will launch a new (“child”) workflow.

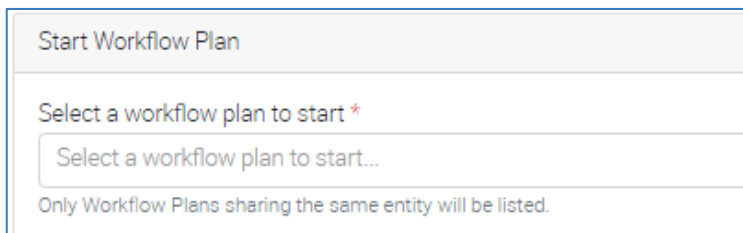
- **Appearance** fields allow the user to give the step a Name, color and an icon.
- Select a **workflow plan to start** by choosing the appropriate plan from the drop-down list.



Name \*

Provide a unique name for the step (50 char max)

**Note:** All “child” workflow plans must share the same Entity as the main “Parent” workflow. They also must be created before this step can be added to the main workflow designer.



Start Workflow Plan

Select a workflow plan to start \*

Select a workflow plan to start...

Only Workflow Plans sharing the same entity will be listed.

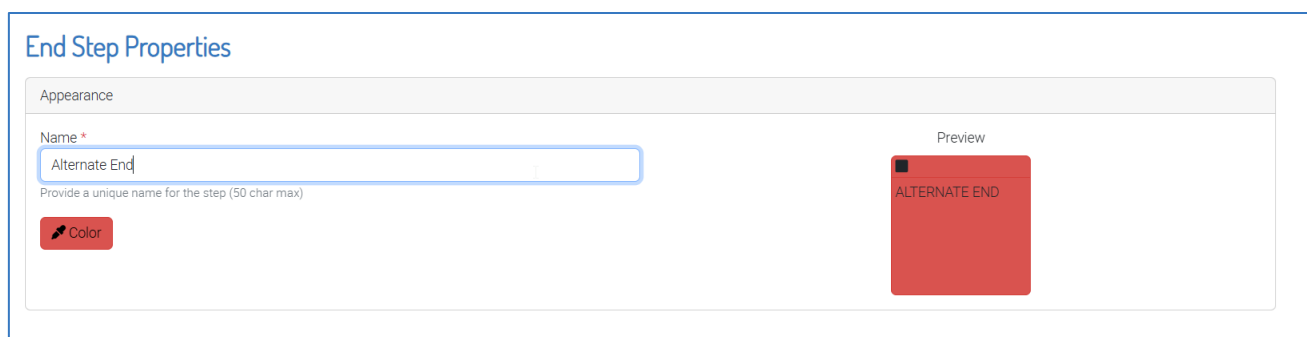
**Note** that only Plans that share the same entity will be offered.

- **END STEP**



Additional End steps can be added within the Workflow.

- **Appearance** fields determine how the step will appear in the Plan Designer. The color will default to red but can be changed.



End Step Properties

Appearance

Name \*

Alternate End

Provide a unique name for the step (50 char max)

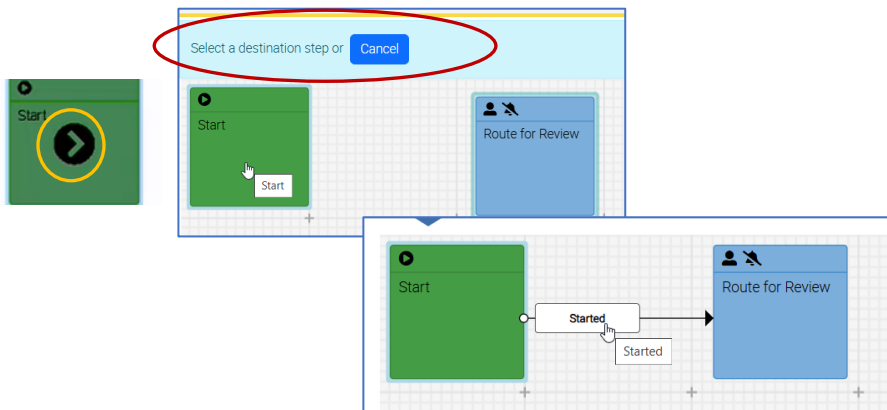
Color

Preview

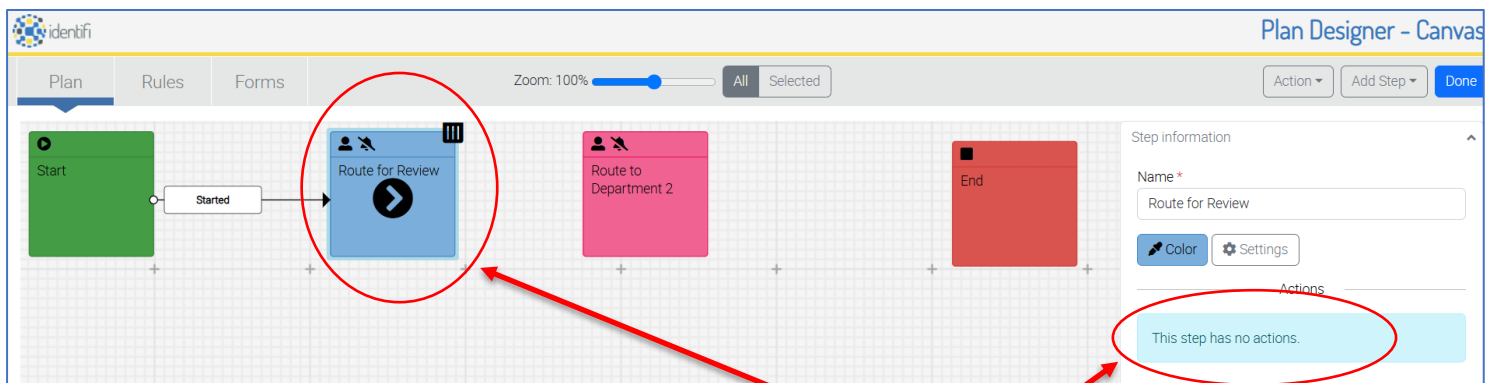
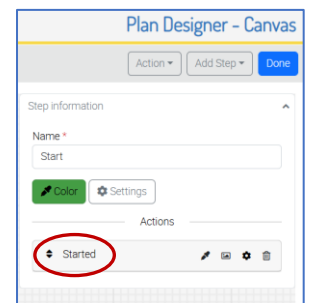
ALTERNATE END

## CONNECTING WORKFLOW STEPS

To connect the steps, click on the first step to highlight it, then the “play” arrow at the center of the step to select the destination step. Click the destination step to connect the two steps.

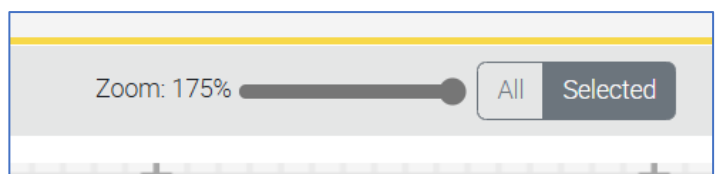


These connections form **Actions** and will appear as *Action Buttons* on the work items. For the Start step, it will automatically reflect “Started.” (For subsequent steps, the word will be “Action” and can be changed to reflect the desired action, such as *Complete, Submit, Return for Correction, etc.*)

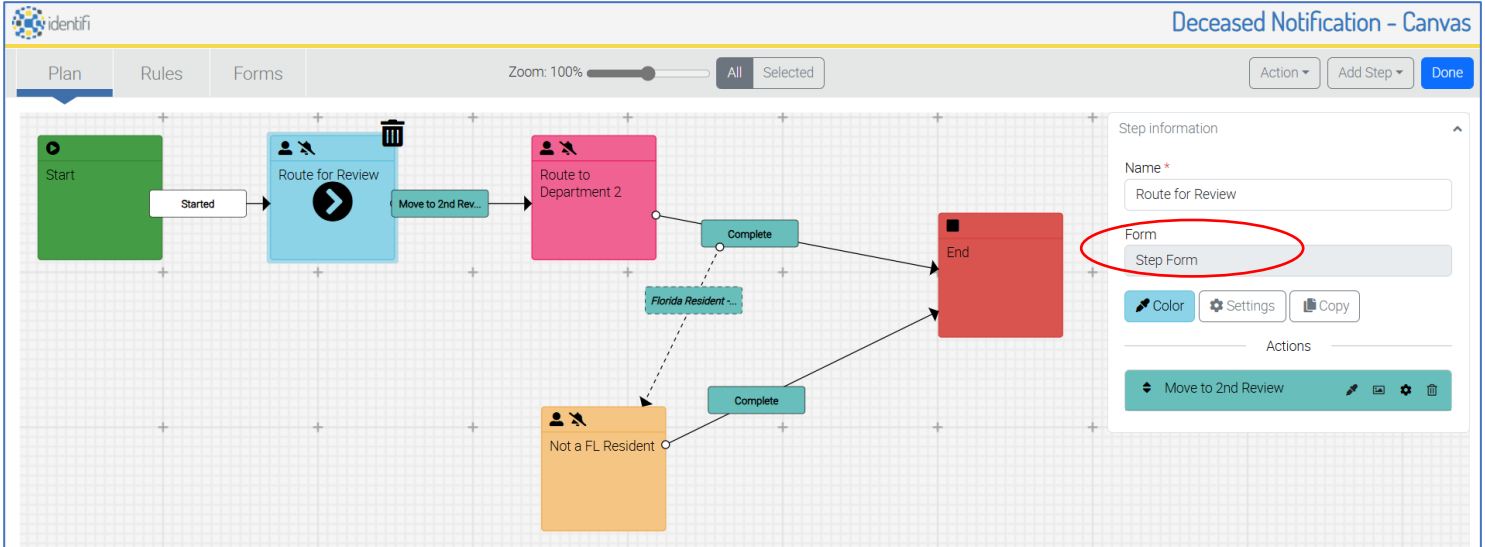


**Note:** the “Route for Review” step highlighted in the above screenshot reflects “*This step has no actions*” because it is not connected to any subsequent steps. Clicking the “Play” button in the middle will allow the builder of the Workflow to choose the next step for routing (Department 2 or End).

**Note:** The Canvas can be Zoomed up to 175%. The “**Selected**” button at the top will display only the Action(s) for the selected step. “**All**” will display all step Actions.

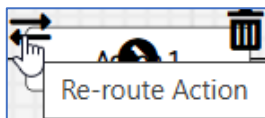


**Continue adding and connecting steps to the Workflow as needed. For any of the steps following the initial Start step, a Form will need to be assigned to each step.**

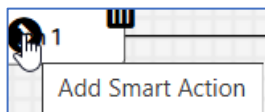


**To edit the Action** (what the buttons for the WF step will say), select the “Action” button between the connected steps in the Plan Designer Canvas.

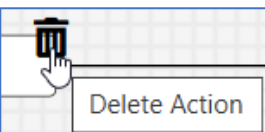
Once selected, it will appear like this:



The **two arrows** will re-route the action to another step.



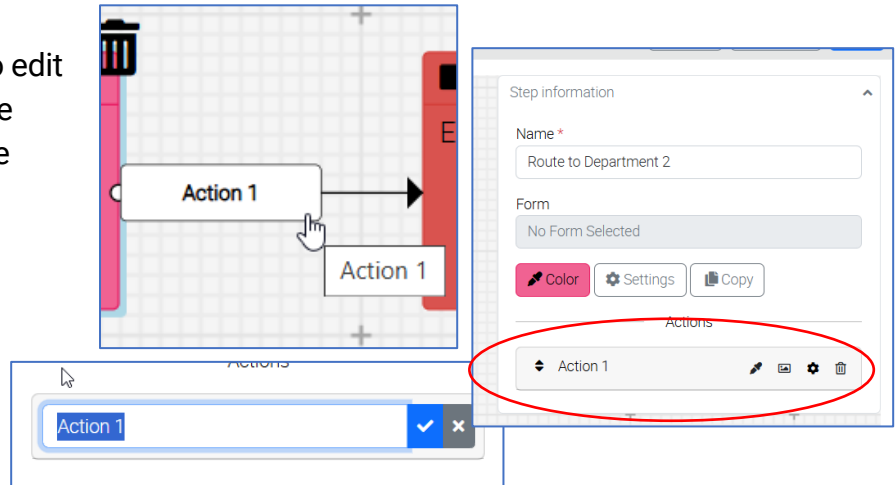
The **play button** allows the user to assign a Smart Action, based on a [Rule](#).



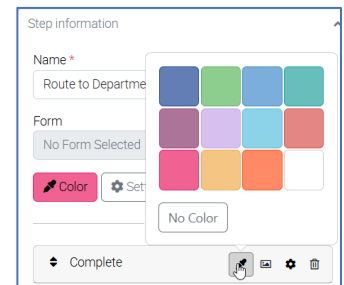
The **trash can** will delete the Action.



- **Action Name**- click on the name to edit it. The Action Name determines the wording on the Action Button in the work item (examples might be *Complete, Return for Correction, Terminate, Send for Approval, etc.*)

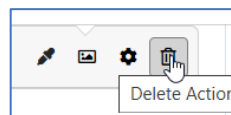


- **Color of the Action** - determines the color the Action Button will have in the work item.

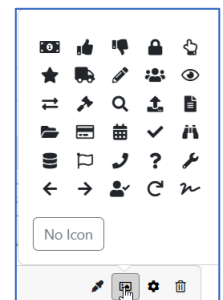
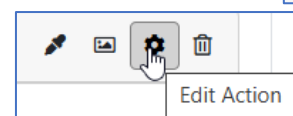


- **Icon for the Action** - determines the icon seen on the Action Button in the work item.

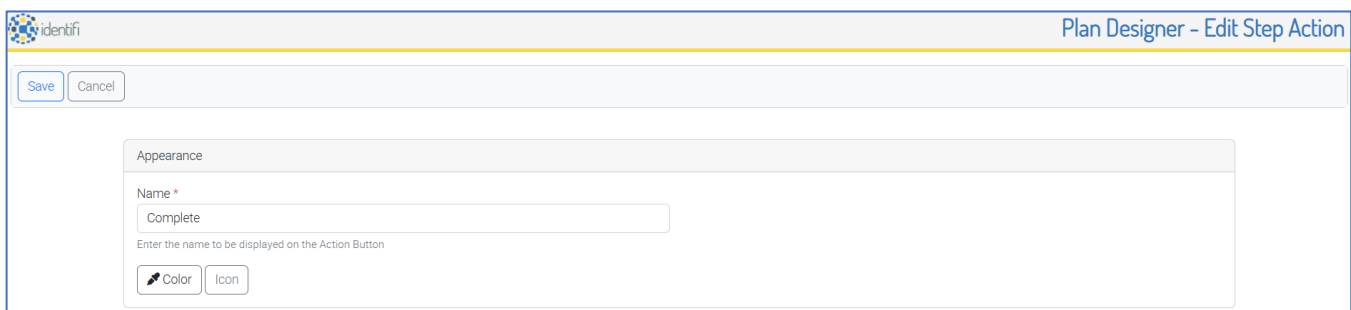
- **Delete Action** – deletes the Action.



- The **Gear Icon** opens the Action in the Plan Designer for editing.



- **Appearance** - Edit the Appearance of the Button (color and icon).



- **Action Behaviors** – Edit what happens when the Action Button is clicked in the Workflow item.

Action Behaviors

Enable Auto Follow
  Enable Return to Sender

Generate a pdf of the workflow form when action is taken

PDF Document Type \*

Select document type for the generated PDF...

Document type is required.

- **Enable Auto Follow** automatically moves the work item to the next step in the workflow and opens automatically, assigned to the same user as the previous step for continued processing (the user does not have to return to their Workflow Inbox to open the work item).
- With **Return to Sender** enabled, the item will automatically return to the user that had it in the previous step in the workflow (the user who last touched it).
- With **Generate a PDF** enabled, a PDF of the step's form can be created and stored in the Document Repository.  
**Note:** The Document Type must exist in Identifi to be visible in the dropdown and should be added to the [“Completed/Terminated Work Items”](#) section within the Workflow Plan Settings.
- **User Assignment Override** allows the end-user of the work item to select from a drop down of specific individuals to manually assign the work item directly to the selected User's Inbox, overriding the default Assignment.

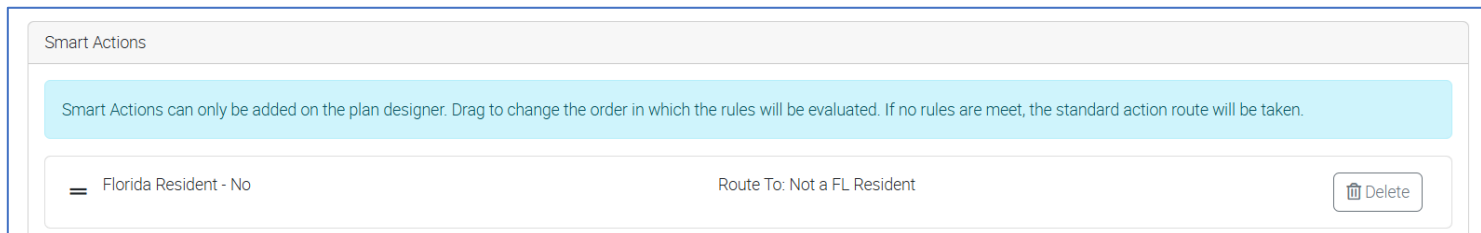
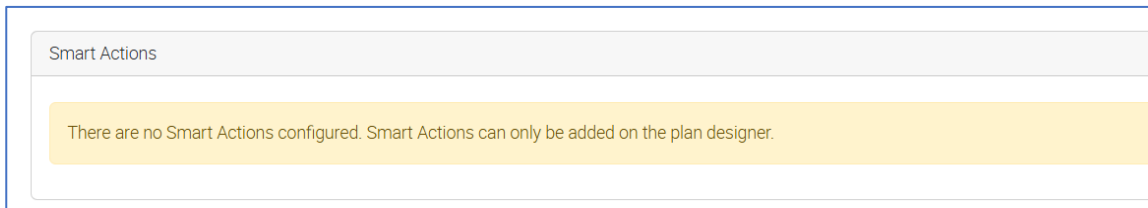
User Assignment Override

Allow for the Next Assigned User to be Manually Assigned  
 Indicate the Users and/or Groups that can be assigned

x Tests User
x Sheila TestUser
x Workflow Test Group
x ▼

- Configured **Smart Actions** will be displayed in the Smart Actions section.

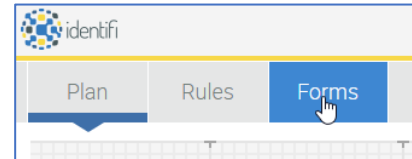
Smart Actions are associated with Rules and allow items to move through steps in the Workflow without user action (see [Creating a Smart Action using Rules.](#))



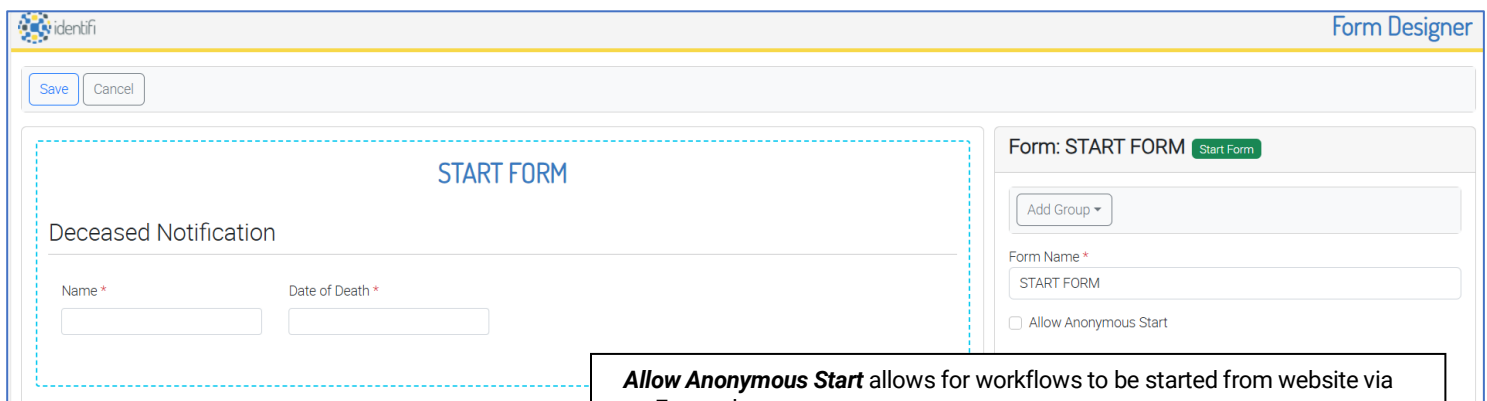
## Working with Forms:

Forms determine what information is collected and presented at each step. A Start Form will automatically be created (which can be customized) and multiple other forms can be configured for the Plan.

Within the Plan Designer, click on the “Forms” tab at the top.



The START FORM already exists and contains the plan’s General Keys.



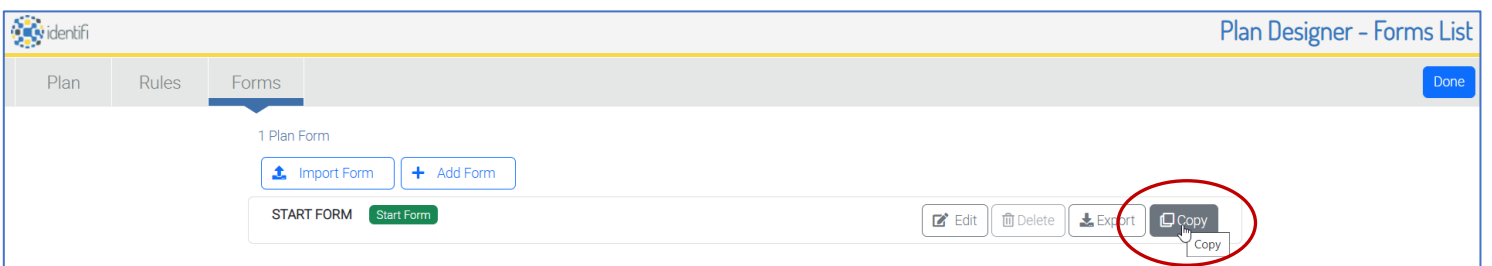
**Allow Anonymous Start** allows for workflows to be started from website via an External step.

**Note:** an external URL must be created to use this feature. Contact Identifi to arrange for configuration.

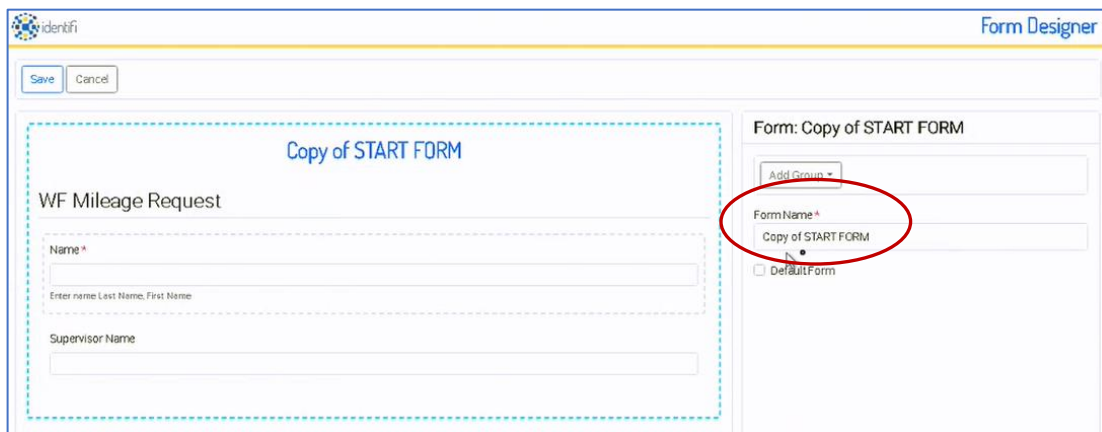
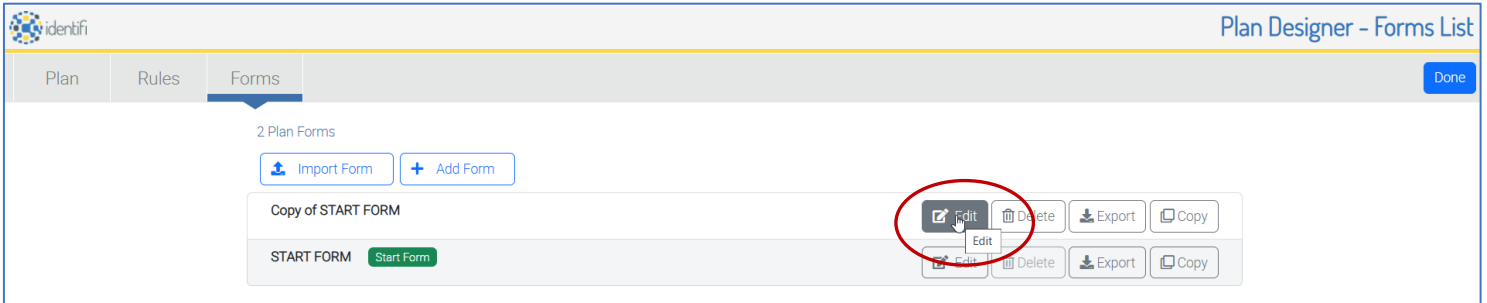
- For Workflow Plans being started by **completion of a Workflow Form** (rather than a Document arriving in the archive), the Start Form can be modified to include additional attributes that are needed to start the Workflow.
- For Workflow Plans that begin **with the arrival of a document to Identifi**, the Start Form can remain untouched and additional forms created that are associated with a specific step.

For this example Workflow, the Start Form will remain untouched, and the copy option will be used to create a new Form for the first and subsequent steps.

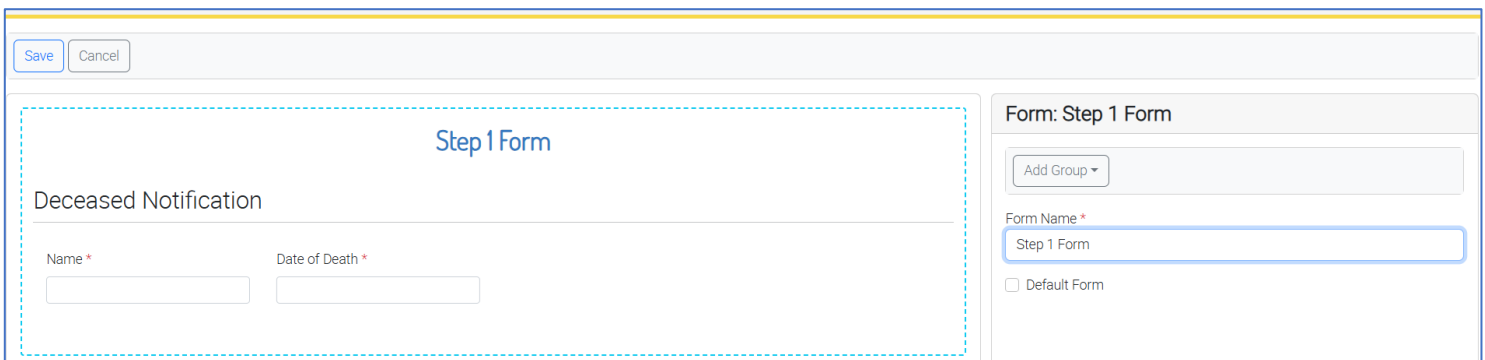
Click “**Copy**” to create a copy of the Start Form.



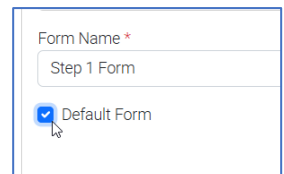
The Copy of the Start Form appears at the top of the forms list. Click **“Edit”** to make changes to this new form.



For this example, the form has been renamed **“Step 1 Form.”**



**Note:** Toggling the box for **Default Form** will designate the form as the Default. A Default form must be selected so that something is visible besides the action buttons for the End User.



The Default Form also allows the form to be visible on completed work items. If there are multiple forms within the Workflow, it is recommended that the form that has the most information be designated as the Default Form.

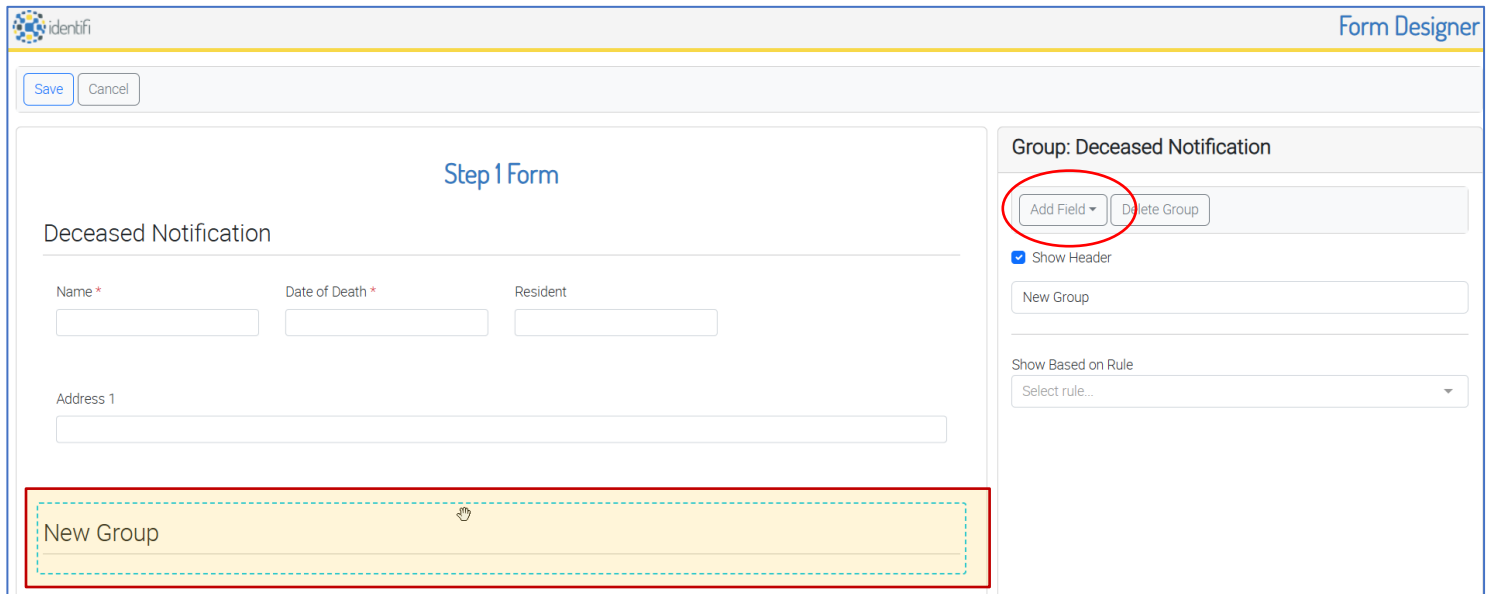
Additional Attributes can be added to this new form (Attributes that currently exist within the system), and new Attributes can also be created if needed.

## A few tricky things related to the form.

Notice the highlight around each section when it is selected. The label to the right changes.

In the following example, the **Group** is selected:

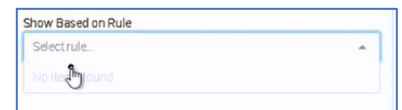
Because the group is selected (the blue dotted lines are around it), the **“Add Field”** is available to the right of the screen. Within each group, a field can only be added once.



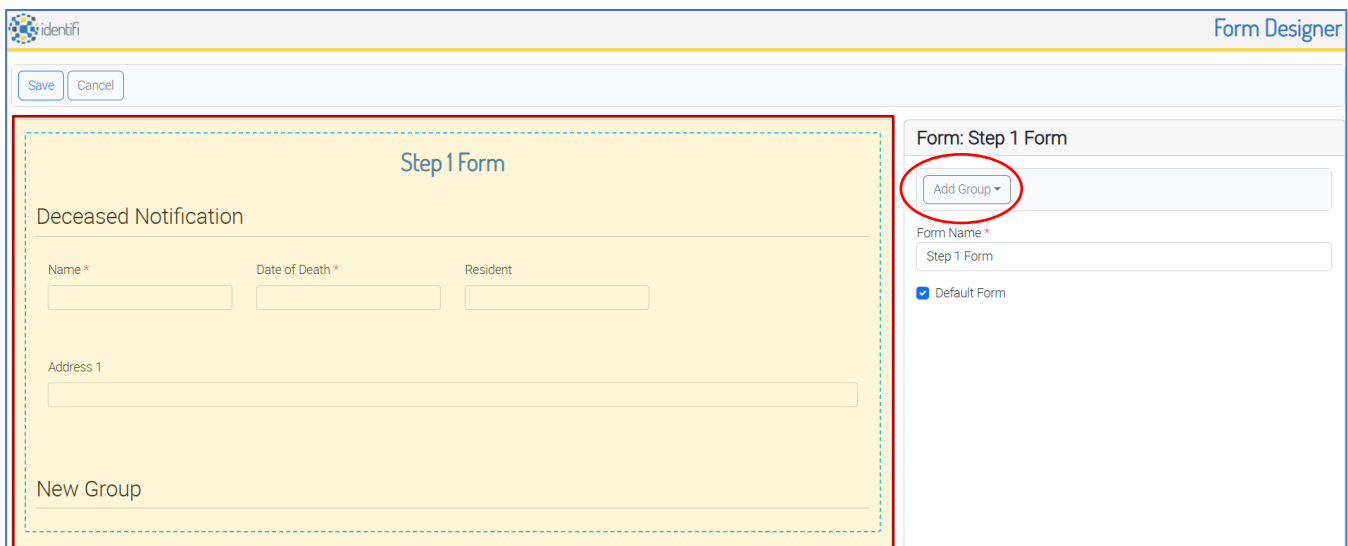
The screenshot shows the 'Form Designer' interface. On the left, a form titled 'Step 1 Form' contains a section 'Deceased Notification' with fields for 'Name \*', 'Date of Death \*', 'Resident', and 'Address 1'. Below this is a 'New Group' button. A blue dotted border highlights the 'New Group' button. On the right, a panel titled 'Group: Deceased Notification' contains an 'Add Field' button (circled in red), a 'Delete Group' button, a 'Show Header' checkbox (checked), a 'New Group' input field, and a 'Show Based on Rule' dropdown menu.

In the next example, when the cursor is outside of the Group, the entire Form is selected and the **“Add Group”** button is available to the right of the screen.

This would be especially important, for example, if a specific Group would be displayed based on a rule. (See [Working with Rules.](#))



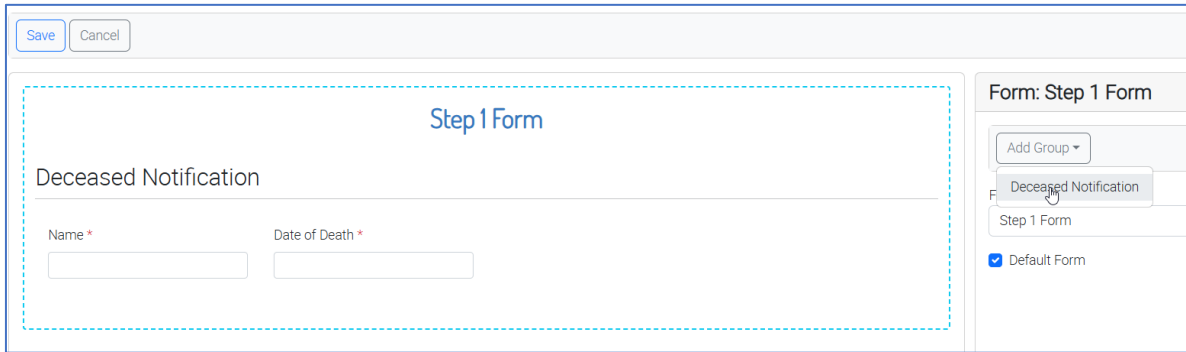
A close-up of the 'Show Based on Rule' dropdown menu. It shows 'Select rule...' at the top and 'No rule found' below it. A mouse cursor is pointing at the 'No rule found' option.



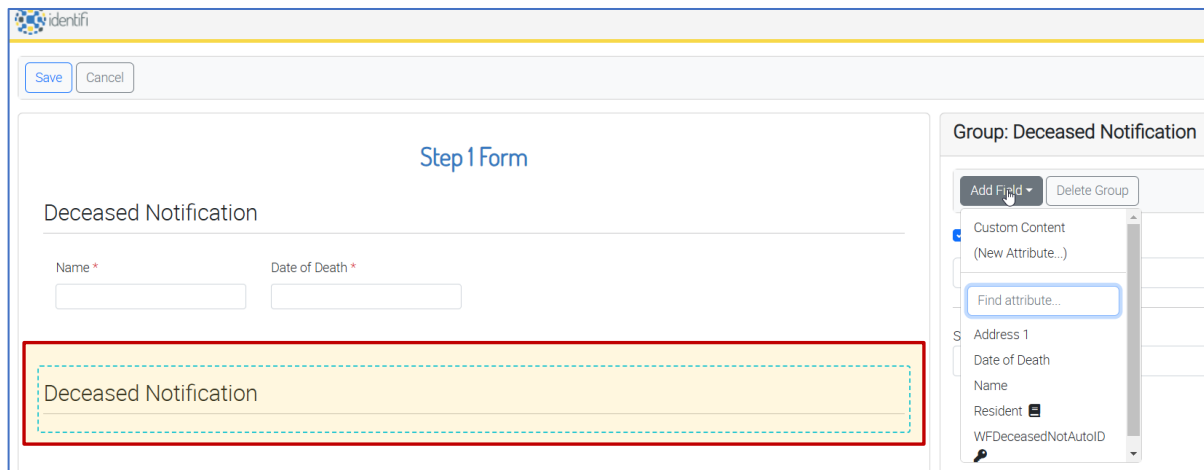
The screenshot shows the 'Form Designer' interface. The entire 'Step 1 Form' is highlighted with a blue dotted border. On the right, a panel titled 'Form: Step 1 Form' contains an 'Add Group' button (circled in red), a 'Form Name \*' input field with 'Step 1 Form' entered, and a 'Default Form' checkbox (checked).

Click **“Add Group.”** The system offers us the name of the available group(s).

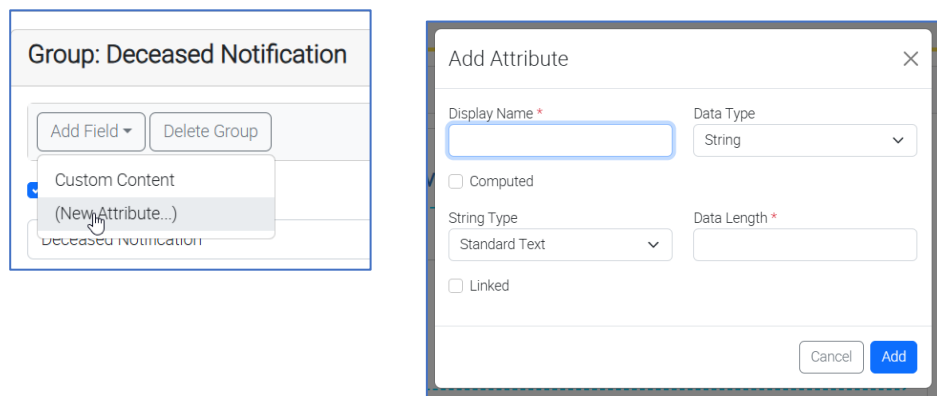
Selecting the Group name from the drop down will select that Group(s) for the form and create a new Group and its available Attributes.



Attributes within the Workflow Entity will be the fields listed here to be added to the Group. Select the desired fields and add them to the Group. If a new Attribute is needed that has not yet been created, it can be created here or within the Workflow Entity (see [Create a New Attribute](#)).

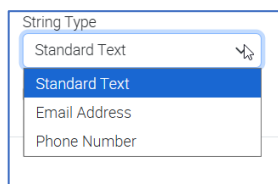


**To create it a new Attribute from within the Form**, select “(New Attribute)” from the dropdown and complete the “Add Attribute” dialog box.



- **Display Name** – the name given to this new field
- **Data Type:**
  - **String** – Words/verbiage – allows for both Numeric and Alphabetic characters in the field. Most of the time the Attribute will be a String Attribute because it is a word or phrase.
    - When choosing String Data Type, the **Data Length** also must be defined; so, if you put in 5 as the data length, the Attribute can only be up to 5 characters long.
 

*Note: Once the Data Length is set, you can go UP in value, but not DOWN, so bear that in mind when setting the length.*
  - **Numeric** – zero through nine (0-9)
  - **Currency**
  - **Date**
- **String Type**
  - Standard Text
  - eMail
  - Phone Number

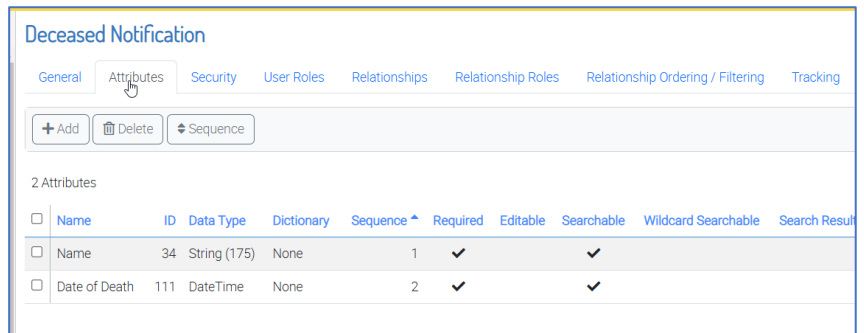
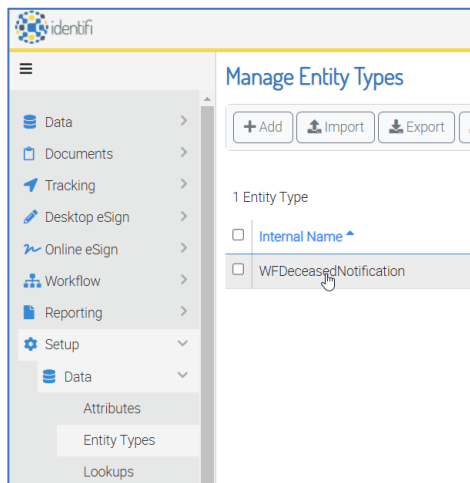


A **Dictionary Value** can also be assigned to offer a drop-down for the Attribute. This is configured within the Entity, not from within the Workflow Form. The Attribute can be created from within the Workflow Form, but the Dictionary Values will be defined at the Entity level. (See [Adding a Manual Attribute with Dictionary Values.](#))



### Creating a New Attribute within the Workflow Entity:

- Under **Setup -> Data -> Entity Types** click the Entity Type for the Workflow Plan to open it.
- Click on the **Attributes** Tab to display the Attributes:
- Click the **“Add”** button at the top.

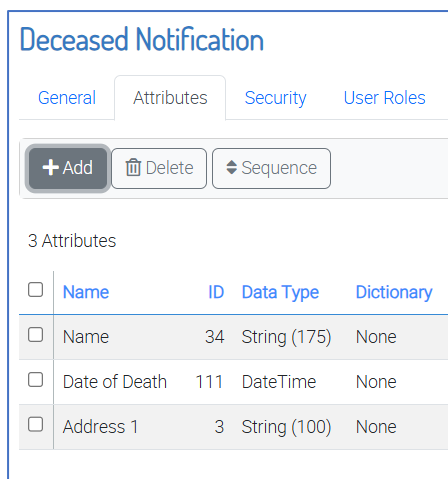
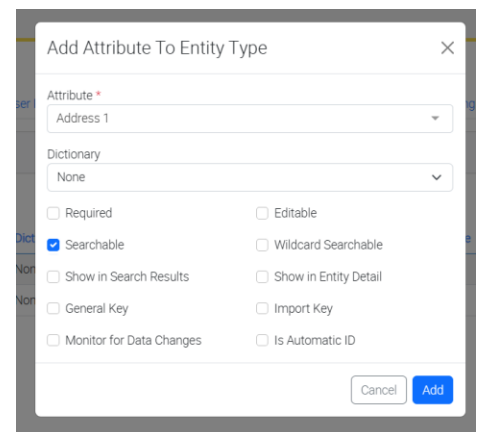


Select from the list of existing Attributes or select “(New Attribute)” to create a new Attribute.

As an example, “Address 1” already exists in the system and can be added directly to this new Entity from the list offered.

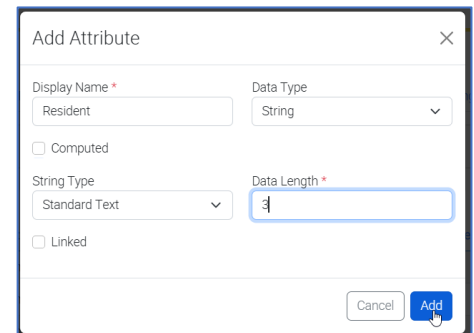
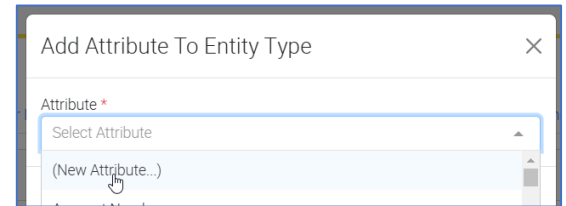
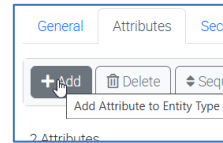
- Ensure that it is marked **“Searchable.”**
- Click **“Add”** at the bottom.

“Address 1” is now part of the Workflow Entity.



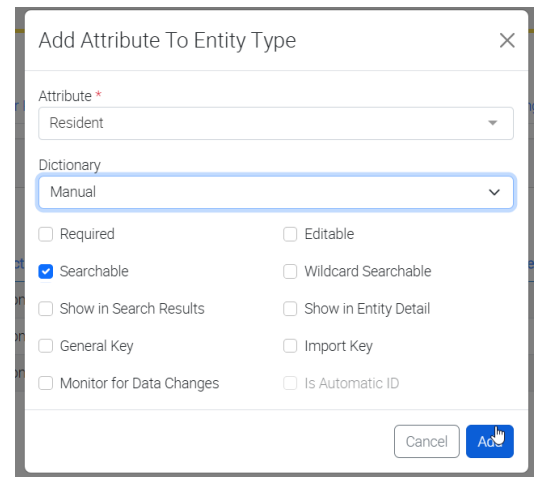
**To add a Manual Attribute with a dictionary values:**

- From the Attributes Tab, click the **“Add”** button at the top.
- Select **“(New Attribute)”** from the drop-down menu
- Define the Data Type/String Type/Data Length for this attribute.



Select **Manual** which means that once the Attribute has been created, the options for a drop-down can be defined.

Make it **Searchable**.

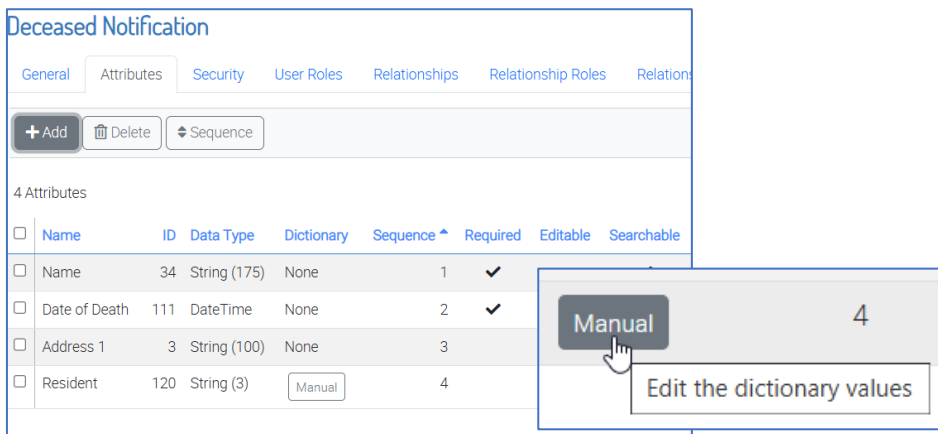


**Note:** See below for a definition of each of the other Attribute options available when creating a new Attribute:

- **Required**- sets the attribute as required for new items added to the Entity.
- **Editable** – designates whether the attribute is editable within Data.
- **Searchable**- enables the attribute to be searchable through Data Search.
- **Wildcard Searchable** – enables the attribute to be searchable using a partial term accompanied by an asterisk (\*).

- **Search Results** – displays if the attribute is shown as a column in Document Search.
- **Show in Entity Detail** – designates if the attribute is shown on the *Data Detail* screen within Entity Data.
- **General Key**- sets the unique record for Work items and triggers Trak to look for this attribute; **Note:** *If the installation is enabled for the “Desktop eSign to Online eSign Bridge” feature, the General Key for that Entity will be set to “Receipt Number.”*
- **Import Key**- sets the unique attribute marked for import of the host data file (**do not edit this**).
- **Monitor for Changes**- enables the attribute, and all related attributes, to be updated as part of the Data Sync process.
- **Is Automatic ID** - designates a unique identifier for the specific workflow when used as a General Key.

Once the Manual Attribute has been created, it is visible in the Attribute list, and the **“Manual”** button will be displayed to allow definition of the options for the Attribute when the button is clicked.



Deceased Notification

General | **Attributes** | Security | User Roles | Relationships | Relationship Roles | Relationships

+ Add | Delete | Sequence

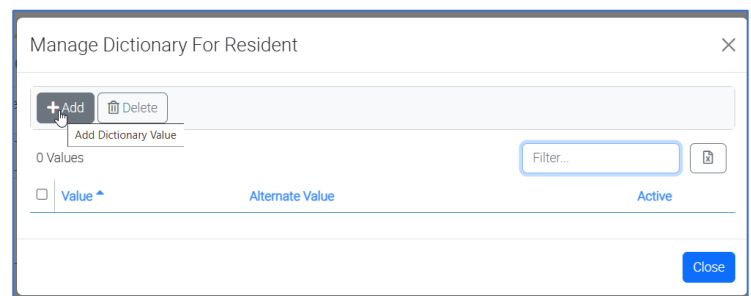
4 Attributes

<input type="checkbox"/>	Name	ID	Data Type	Dictionary	Sequence	Required	Editable	Searchable
<input type="checkbox"/>	Name	34	String (175)	None	1	✓		
<input type="checkbox"/>	Date of Death	111	DateTime	None	2	✓		
<input type="checkbox"/>	Address 1	3	String (100)	None	3			
<input type="checkbox"/>	Resident	120	String (3)	Manual	4			

Manual | 4

Edit the dictionary values

Click **“Add”** at the top to add the first Dictionary Value to be added to the drop-down list for this Attribute.



Manage Dictionary For Resident

+ Add | Delete

Add Dictionary Value

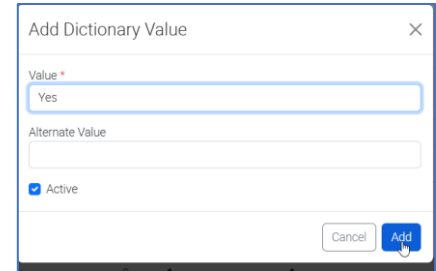
0 Values

Filter...

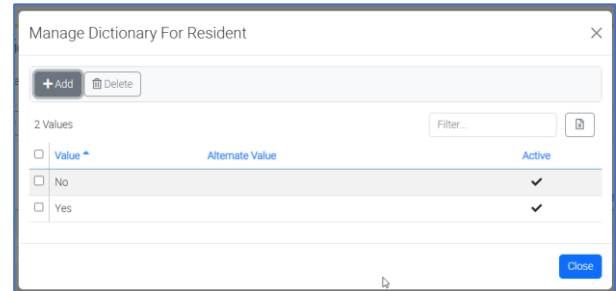
<input type="checkbox"/>	Value	Alternate Value	Active
--------------------------	-------	-----------------	--------

Close

Enter the first Value ( in this example, “Yes,” and click “Add.”  
Add the next dictionary value(s) in the same way.



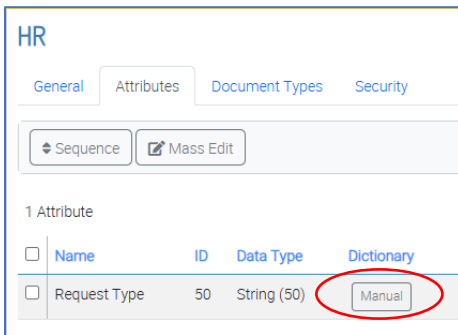
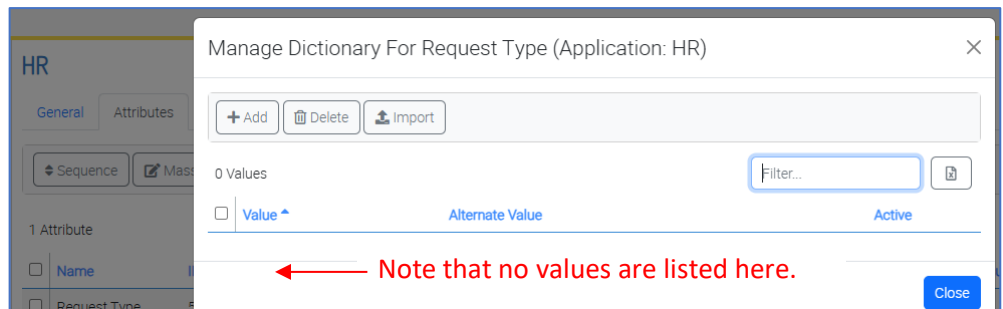
Once added, options will be listed in alphabetical order.  
Click “Close” to complete the Manual Attribute.



The new Attributes will now be available to add to the Form.

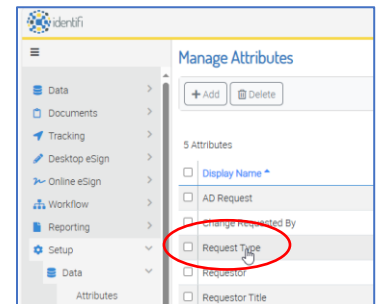
**Important Note regarding Manual Attributes:**

If the Workflow Plan allows for the upload of documents or the creation of a .pdf document of a form to be stored to Identifi, ensure that the Manual Attribute listed within the Application contains values. When created within the Workflow Entity, the values are not automatically added to the Application, even though the Manual button is visible in the Attribute list in the Application(s). This will prompt an error message when attempting to upload a document or create a .pdf document within the Workflow.

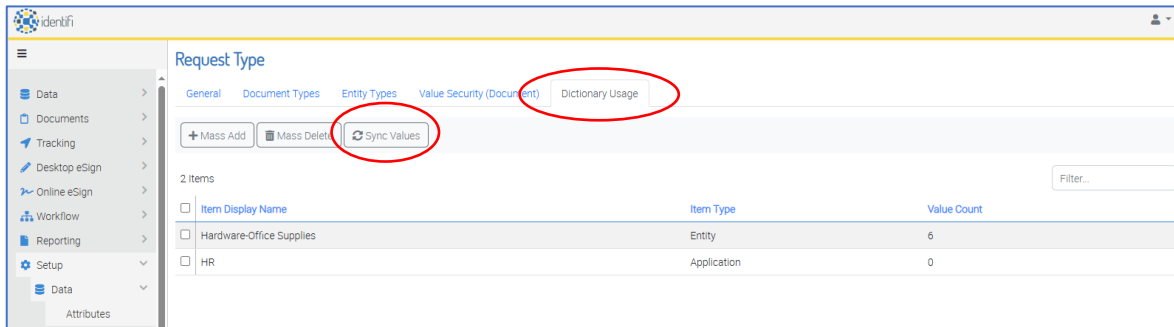



**Do not add the values manually here;** instead, go to **Setup -> Data -> Attributes** and click on the Attribute Display Name to open the Attribute.

Select the **Dictionary Usage** tab to view the usage of this Attribute in the system.



The **Value Count** column will display the number of values within the Attribute for each usage instance. To reconcile the Value Count, select the toggle boxes next to the Display Name of each instance and click **Sync Values**.

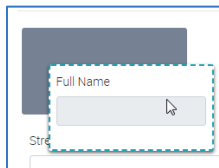


Once all Attributes have been added to the Workflow Entity, the Display Name Formula for the Entity can be created. See [Display Name Formula](#).

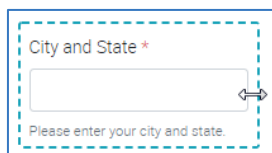
### Editing Fields within a Form

Fields can be modified in the following ways:

- **Reposition:** Drag to reposition



- **Resize:** Hover cursor and use arrows to resize



- **Custom Label:** Add a custom label and help text to make it the form clearer for users and customers.

- **Set Default Value:** Populate with a default value if no other value is entered into the field.



**Note:** With the fields resized to their smallest dimensions, a maximum of 6 fields can be positioned in a single row.

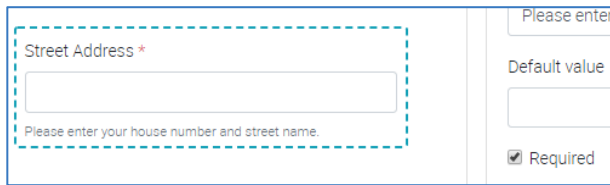
**Field: Address**

Delete Field

Custom label  
Street Address

Help text  
Please enter your house number and street name.

- **Required:** Set as required and prevent the Step from being completed without that field being populated.

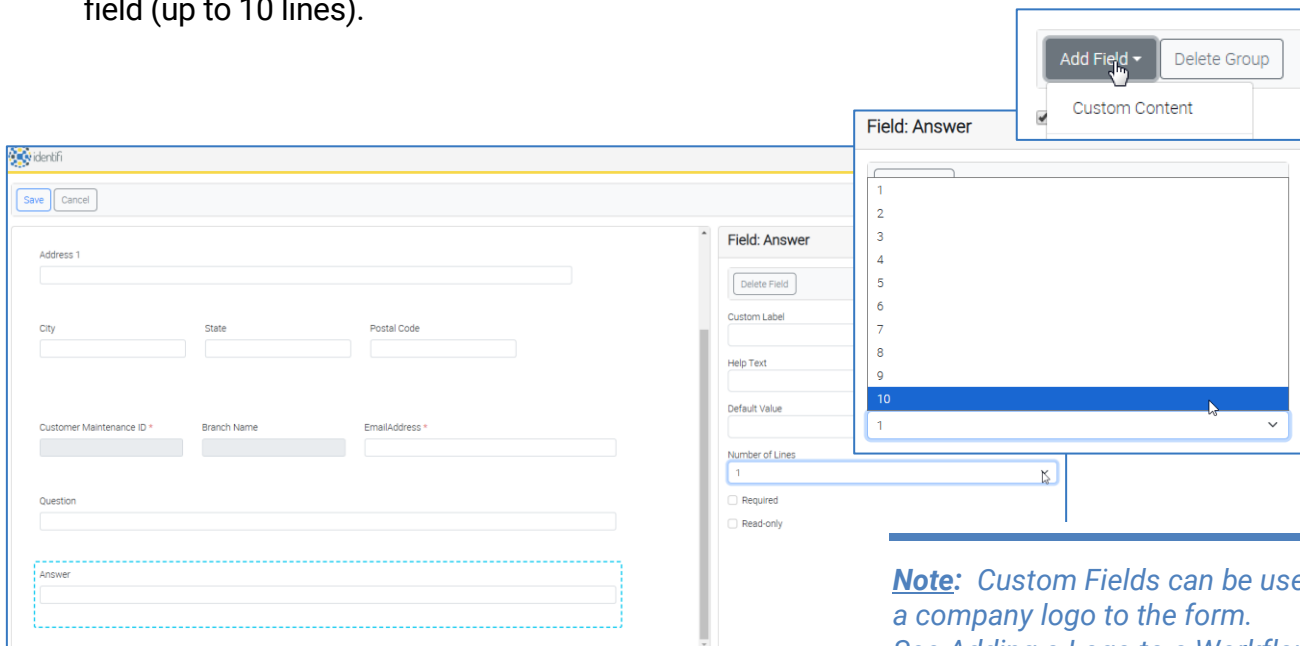


**Note:** *Computed Attribute fields will not have Default Value, Required or Read-Only settings available.*

- **Read Only:** Set as Read Only and prevent changes



- **Create a New Field:** Select *Custom Field* and using the Rich Text Editor to create an entirely unique field (up to 10 lines).



**Note:** *Custom Fields can be used to add a company logo to the form. See [Adding a Logo to a Workflow Form](#) in the Identifi Help Center.*

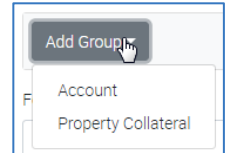
## **Adding Additional Groups within a Form**

Additional Groups can be added by clicking outside the current Group's field area and then selecting **Add Group** again.

---

**Note:** *Multiple Groups will only be listed if there are Entities related to the one selected for the Plan.*

---

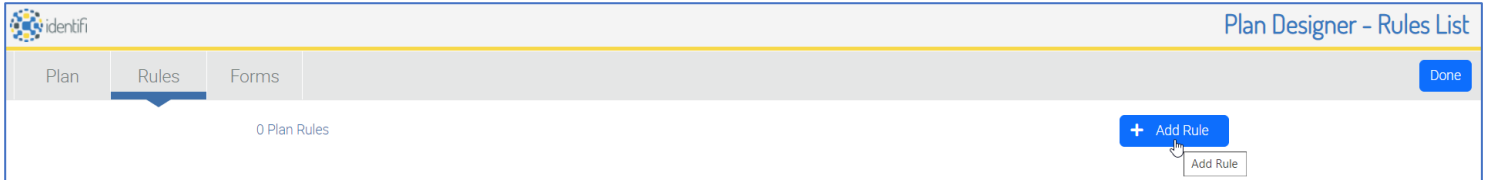


Select the new Group and repeat the steps above.

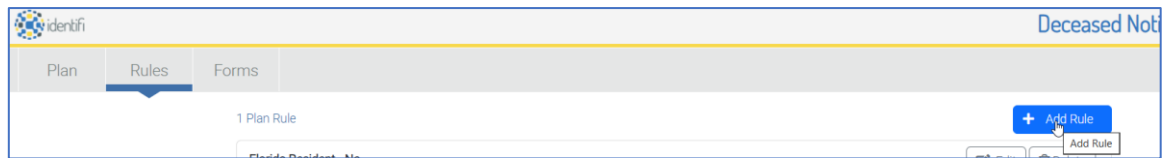
## Working with Rules

### Creating Rules for Workflow Plans

Rules are added under the **Rules** tab of the Plan Designer.

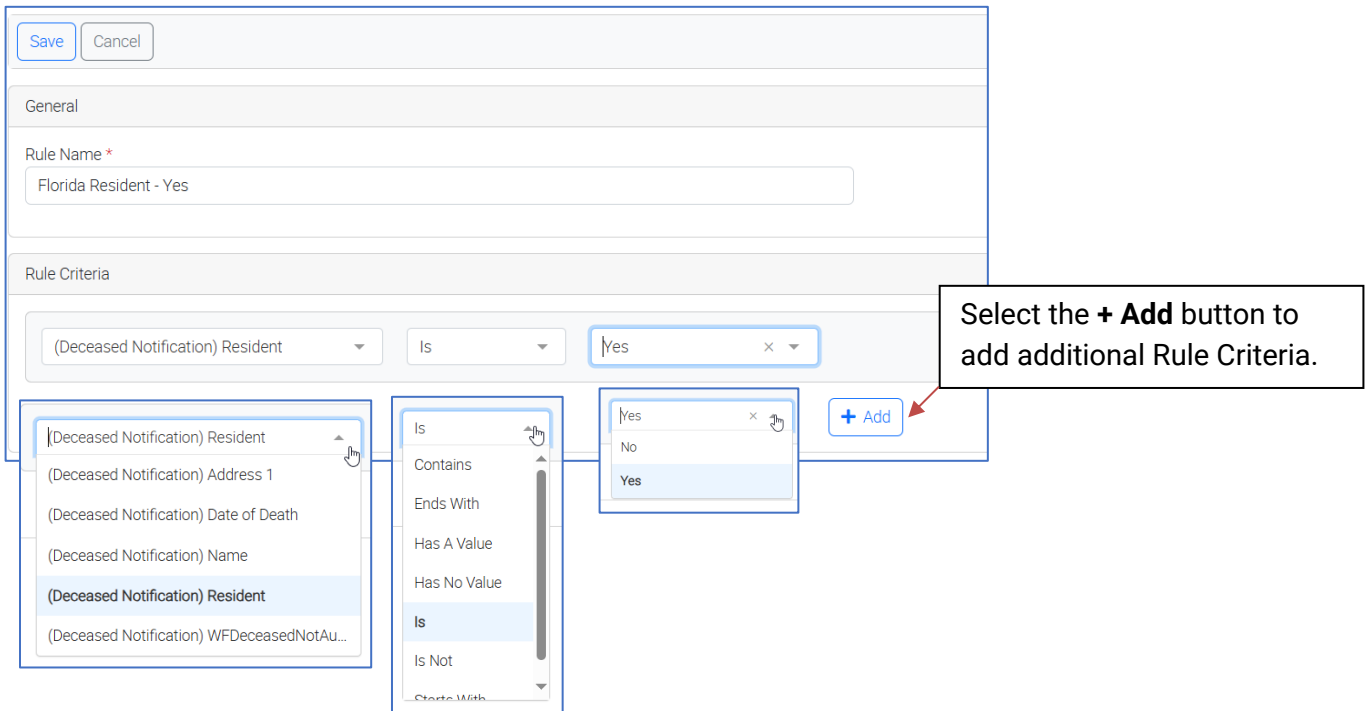


1. Click **Add Rule**



2. The Rule Designer will open to configure the rule.

3. Enter the **Rule Name** and **Rule Criteria**.





Rule Criteria

(Deceased Notification) Resident    Is    Yes

Select Entity / Attribute

**Note: If multiple rule criteria are used, all rules must be either AND or OR; the statements cannot be combined.**

And  
Click to switch the comparison to Or

Or

4. Click Save to save the Rule.

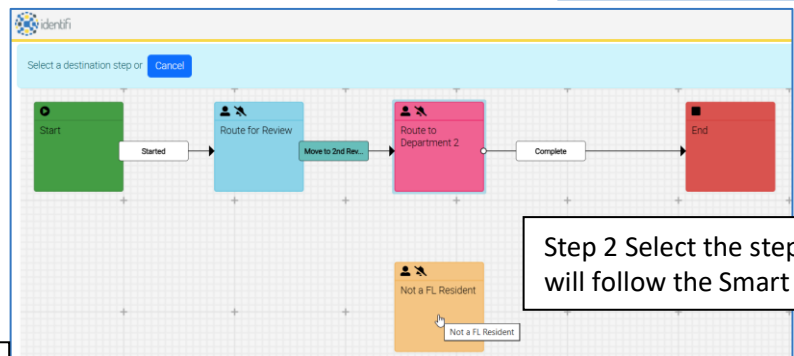
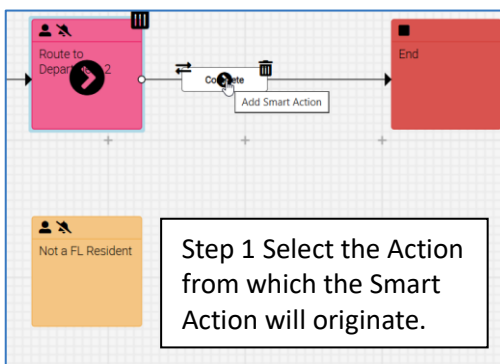
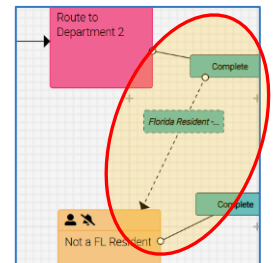
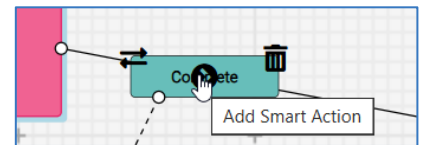
Save    Cancel

Save changes and exit

General

### Creating a Smart Action Using Rules

1. Click on an existing Action to access the play button arrow and then select the Step that will follow the Smart Action.
2. Select the Rule that will run this Action. The Smart Action will automatically save and retain both the original name of the Action and well as the Rule Name.



Add Smart Action

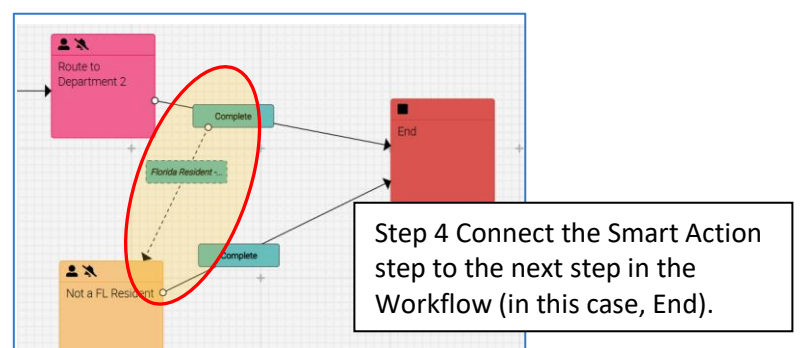
Rule \*

Select a rule to use for this smart action...

Florida Resident - No

Cancel    OK

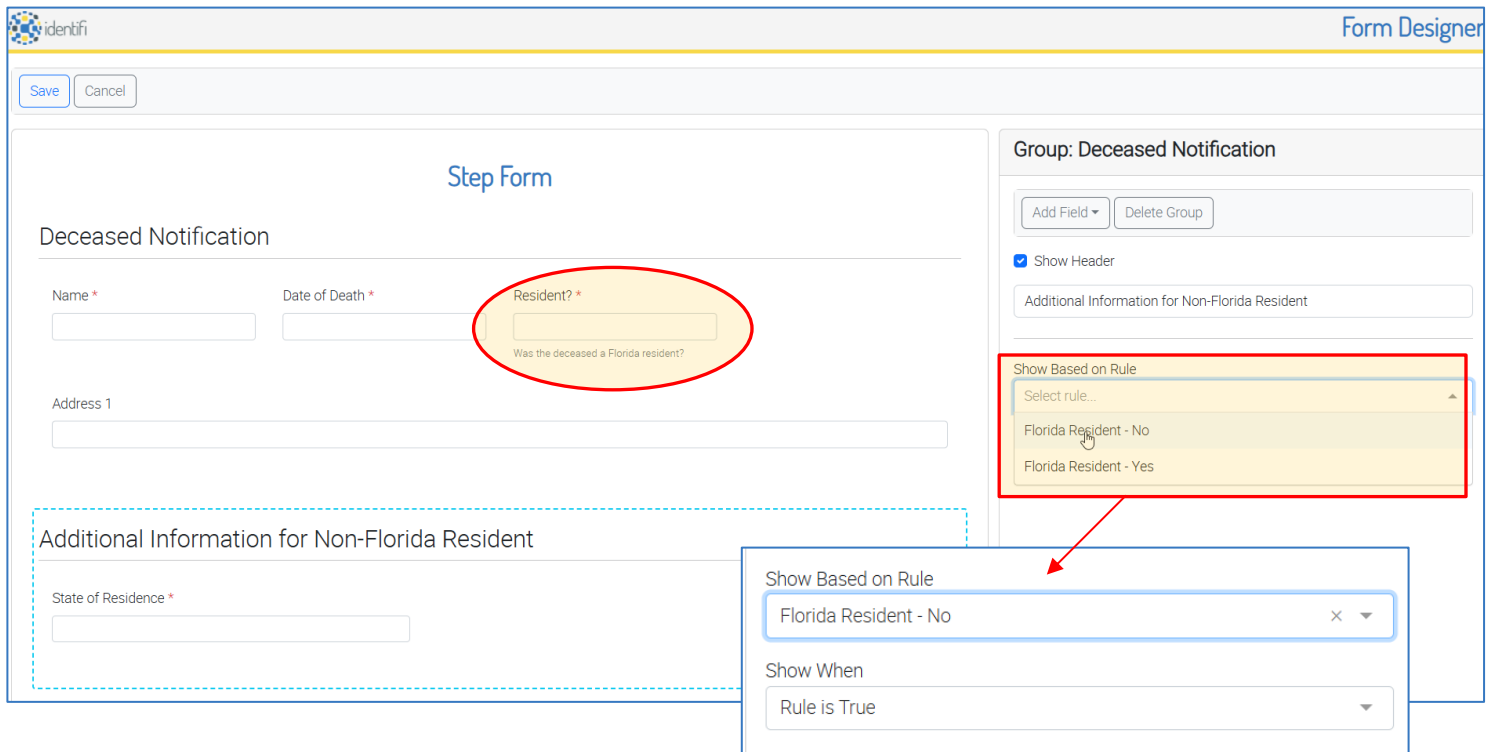
Step 3 Choose the Rule to route the Smart Action.



## Using Rules within a Form to Display Groups:

Note that Groups can be configured to show conditionally within the Form, based on Rules.

In the example below, the second group's "Additional Information for Non-Florida Resident" is selected (blue dots around it to indicate). Over on the right, this group can be configured to display based on a rule ("Florida Resident – No") selected within the workflow item's "Resident?" field.



The screenshot shows the 'Form Designer' interface for a 'Deceased Notification' form. The main form area contains fields for 'Name \*', 'Date of Death \*', 'Resident? \*', and 'Address 1'. The 'Resident? \*' field is circled in red and contains the text 'Was the deceased a Florida resident?'. Below this is a group titled 'Additional Information for Non-Florida Resident' which contains a 'State of Residence \*' field. On the right, the configuration panel for the 'Group: Deceased Notification' is visible. It includes 'Add Field' and 'Delete Group' buttons, a 'Show Header' checkbox, and a text field for 'Additional Information for Non-Florida Resident'. A 'Show Based on Rule' dropdown menu is open, showing 'Select rule...', 'Florida Resident - No', and 'Florida Resident - Yes'. A red arrow points from this dropdown to a larger configuration box below it. This box shows 'Show Based on Rule' set to 'Florida Resident - No' and 'Show When' set to 'Rule is True'.

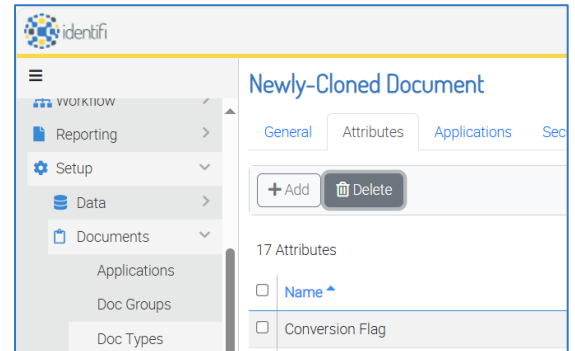
In the workflow item, if "Resident?" is "Yes," then the additional Group will not be displayed. That Group will only be displayed if the Rule "Florida Resident – No" is true.

## Putting it all Together

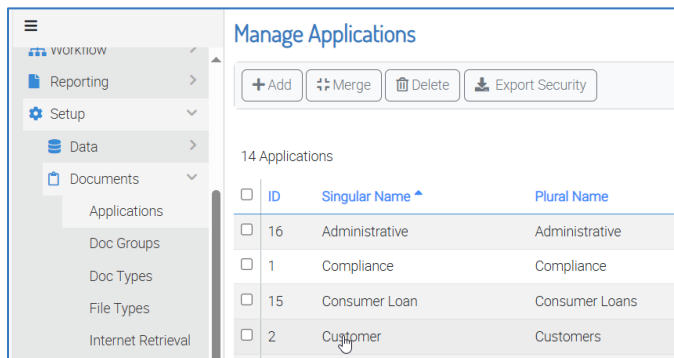
### Creating a .pdf of the Form to be stored to the Identifi Repository

- Create the Document Type by Cloning a Document (see [How to Clone a Document.](#))
- Go to **Setup -> Documents -> Doc Types** and open the cloned Document Type.

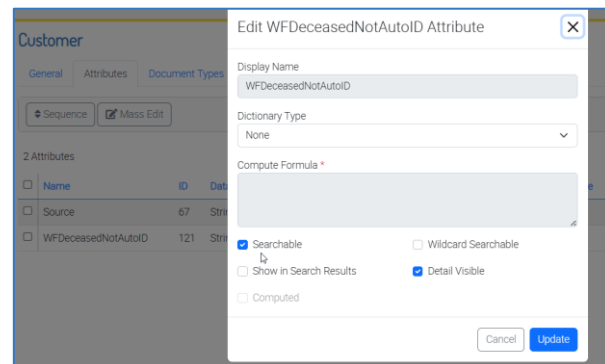
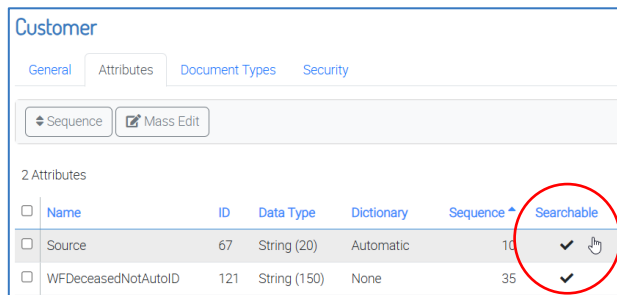
Under the **Attributes** tab, confirm that the Workflow Plan's General Key Attributes exist on the Document Type. (Be sure to include the AutoID if applicable.)



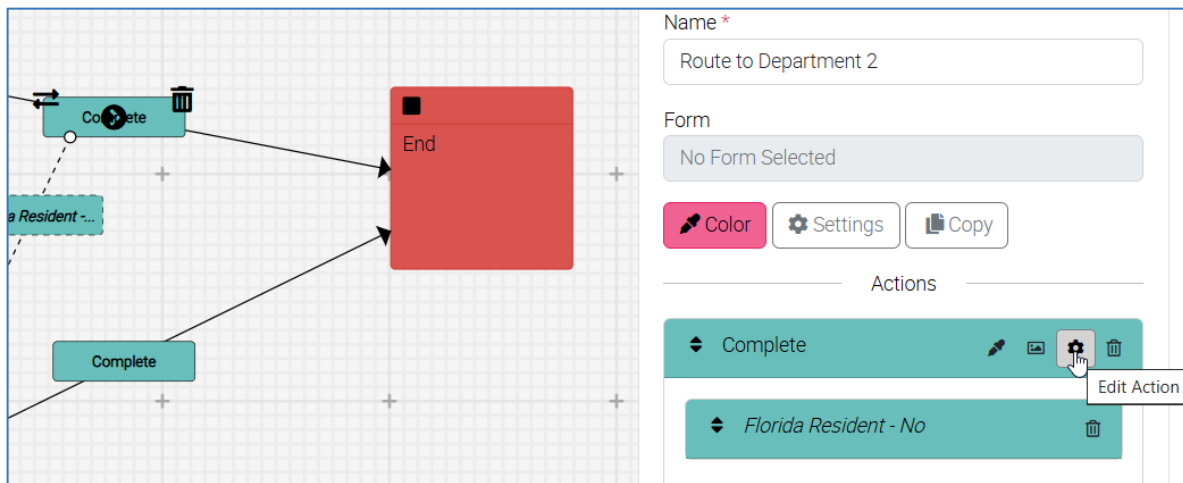
- Go to **Setup -> Documents -> Applications** and open the Application.



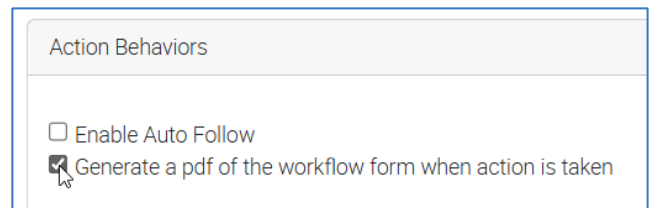
Under the **Attributes** tab, confirm that the Workflow Plan's General Keys are made Searchable within the Application.



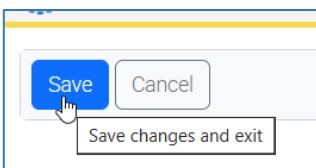
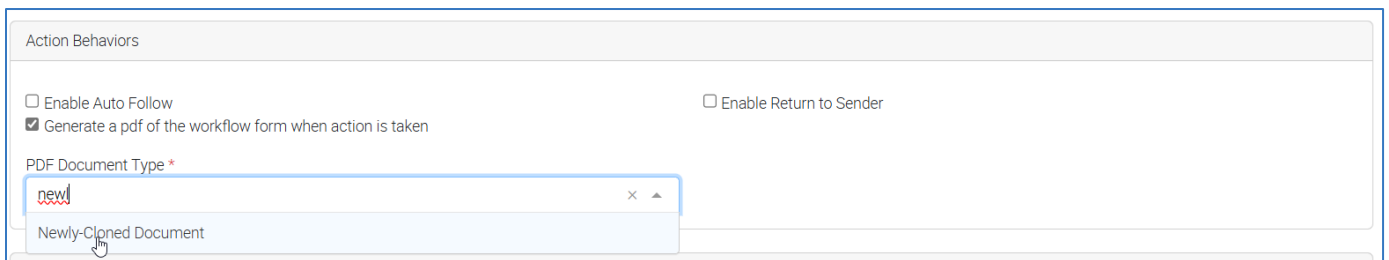
- Within the Workflow Plan Designer Canvas, select the Action going to the step at which the PDF will be created.
- Click the Settings gear on the Action to open for editing.



- In the **Action Behaviors** section, toggle the “Generate a .pdf of the workflow form when action is taken.”



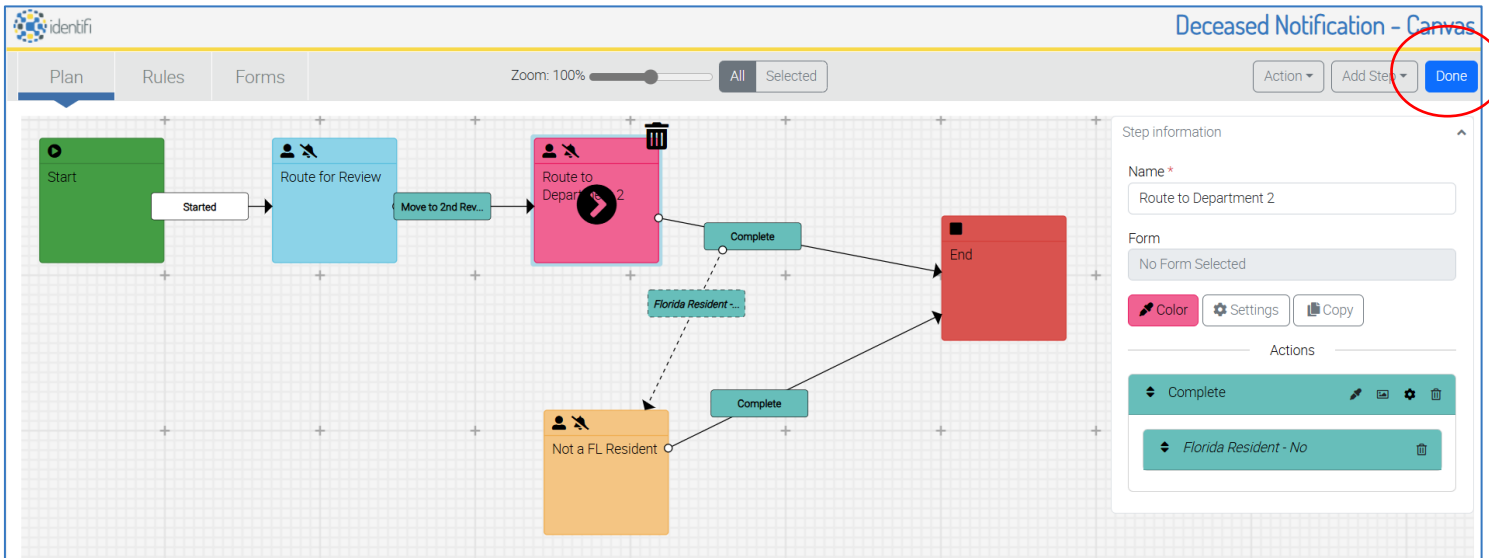
- Select the newly-cloned Document Type from the drop-down menu.



Click Save to save changes.

## Done and Publish:

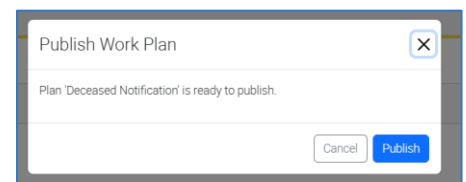
Once all changes have been made to the Plan, Rules and Forms, click the **“Done”** button at the top right of the screen. This will save any edits and return to the Workflow Plans list.



- Click the down arrow on the **“Actions”** button and select **“Publish”** to bring the Workflow Plan online for use.

Plan	Primary Entity	Last Published	Status
Deceased Notification	Deceased Notification	2/5/2025 4:27 PM	Offline
DemoT Test	Employee	1/29/2025 1:51 PM	Offline
Deposit Processing	DepositProcess		
New Employee	Employee		
New Hire	Employee		
OLE Bridge	OleBridge		

- Confirm the action of **“Publish”** by clicking the **“Publish”** button at the next screen prompt.



**Note:** Whenever a change is made to the Workflow Plan, it must be saved (**“Done”**) and Published.

Once published, the offerings under “Actions” display the “**Export**” and “**Take Offline**” options.

- **Export** – Downloads the plan, which can then be imported to create a duplicate Workflow Plan.
- **Take Offline** – unpublishes the plan.
- A new choice is also available: **Revert Unpublished Changes** will restore the Workflow Plan back to the previous version.

