WORKFLOW APBUILDER – VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

Contents

Overview

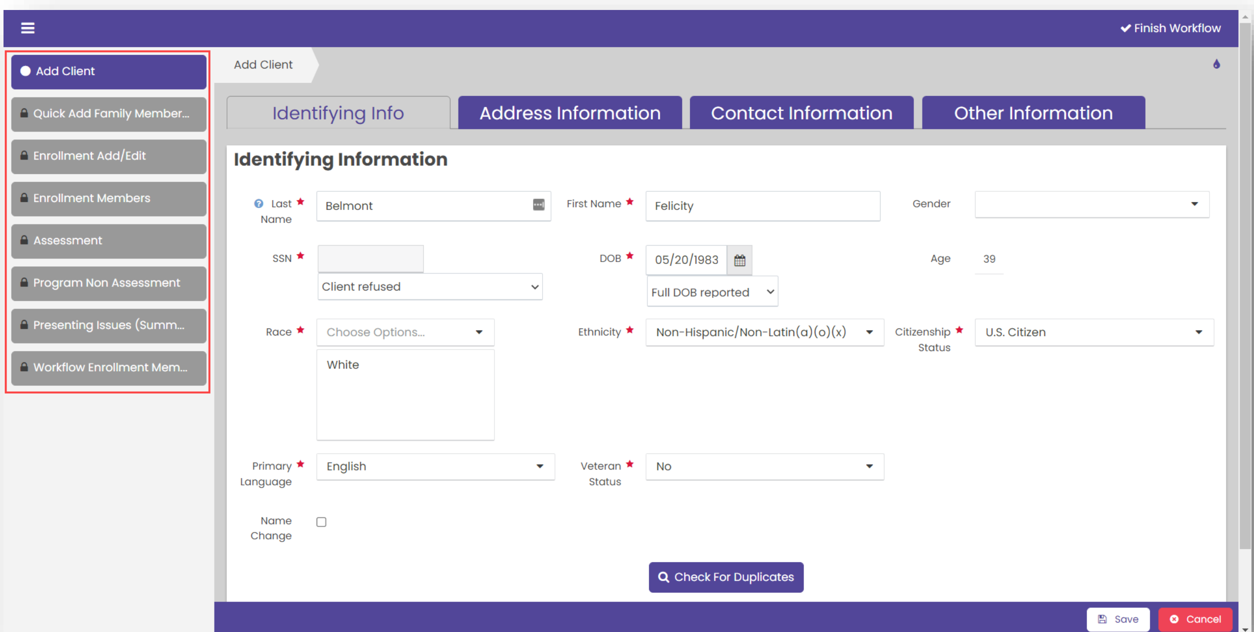
The CaseWorthy *Workflow apBuilder* video series includes information about the following topics:

- An overview of the Workflow apBuilder.
- A review of a baseline workflow and its components.
- How to copy and configure a custom workflow.
- And the steps required to configure a custom workflow using the Free Navigation feature.

This first video highlights important concepts about the Workflow apBuilder.

What is a Workflow?

Workflows are processes which include multiple steps that guide a User through necessary actions to accomplish a task.



Workflows are most commonly used for program enrollment intake, but in baseline they are also available to complete assessments at events other than 'At Entry' such as 'During' and 'At Exit', when creating service plans, recording incident reports, and adding and removing family members.

Workflows create a more efficient experience for the User overall.

They present the necessary forms systematically for the User to easily complete.

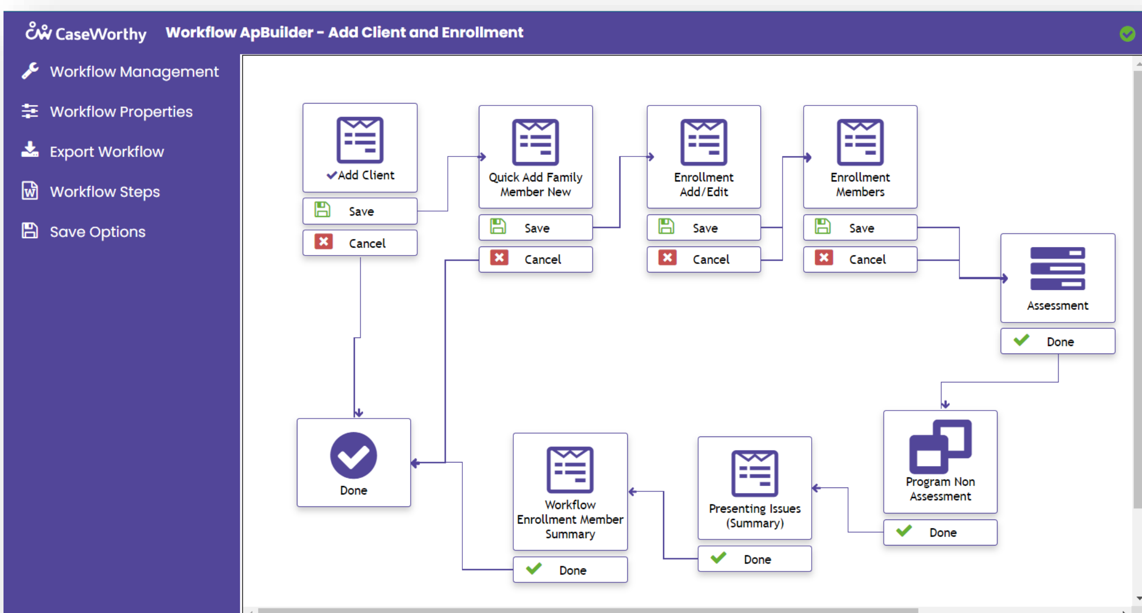
They pass parameters between steps to share information, which eliminates the need for duplicative data entry.

They have the ability to automatically present assessments and non-assessments that apply to the selected program for the necessary members.

NOTE: Please note, the Copy Assessment functionality is covered in the *Assessment* Video Resource Guide series in the fifth part *Other Assessment Configuration*. Please review details there about application settings and workflow properties which impact how assessments behave in workflows.

What is the Workflow apBuilder?

The Workflow apBuilder is the tool within CaseWorthy that is used to build and configure workflows.



Customizing Workflows

It is important to remember a couple of things when adding and customizing workflows.

Baseline workflows can be viewed but cannot be changed.

You do have the ability to copy a baseline workflow, which then becomes a custom workflow that can be modified. However, the baseline forms which are used in the steps of the workflow will remain as the baseline versions, unless individually changed to custom versions.

New custom workflows can be added and customized at any time.

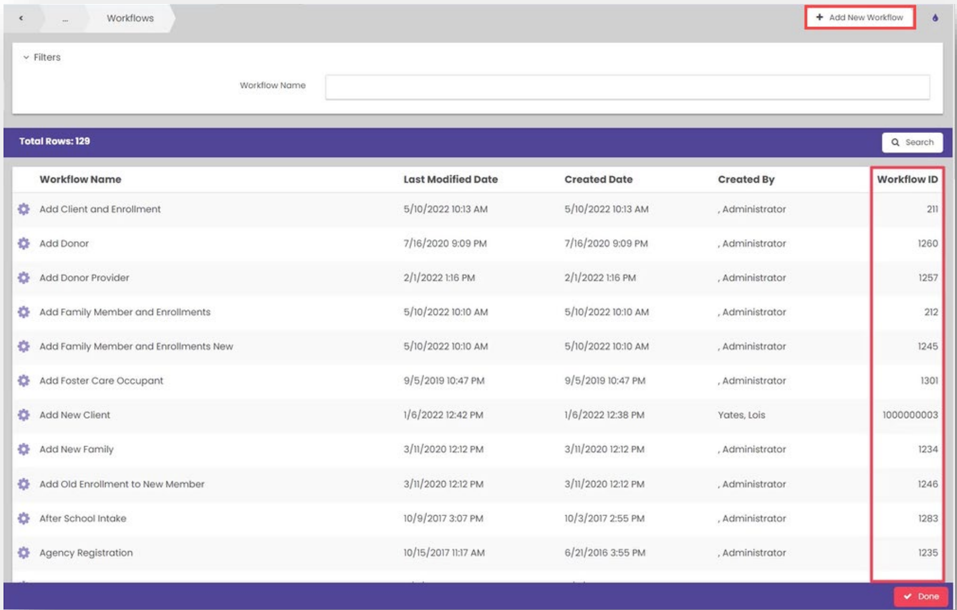
Accessing the Workflow apBuilder

The Workflow apBuilder is available from the Administration tab.

Select Setup, and then select Workflows.

The *Workflows* summary form displays all existing workflows, both baseline and custom.

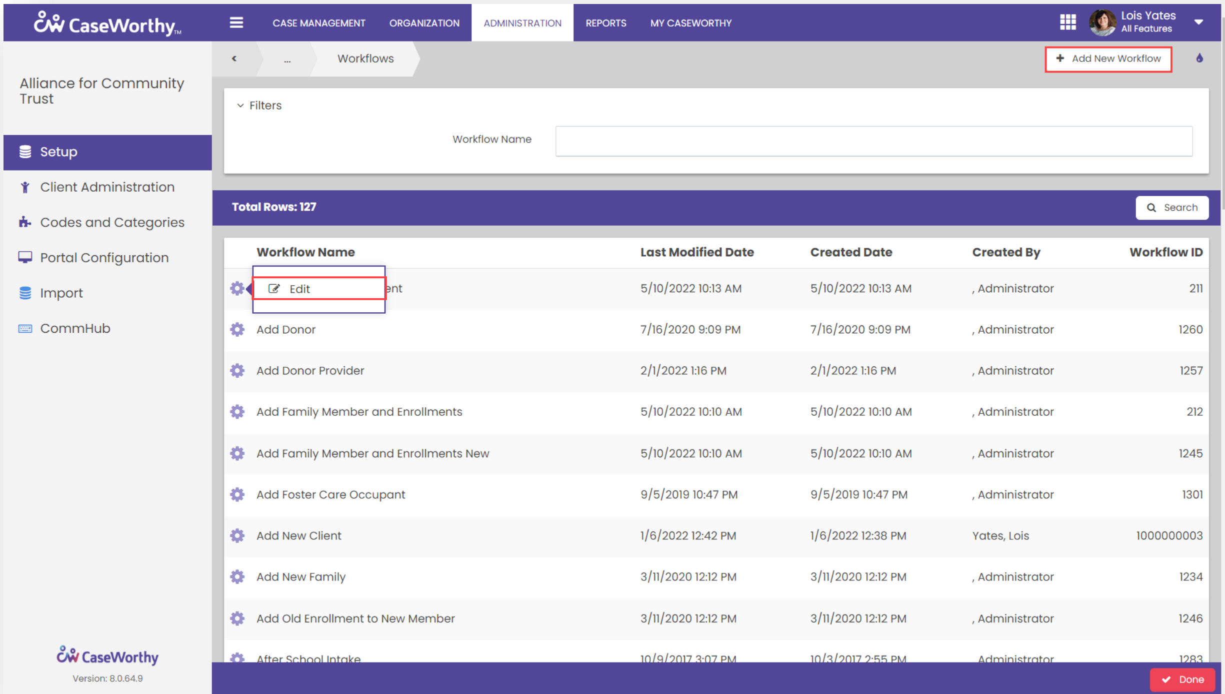
To determine which workflow is baseline versus custom, focus on the **Workflow ID** column. This ID is automatically generated when the workflow is created. All baseline workflow IDs are less than one billion while custom workflows have an ID of over one billion. We can then conclude most of these workflows are baseline, but the *Add New Client* workflow is custom because it has an ID of one billion three.



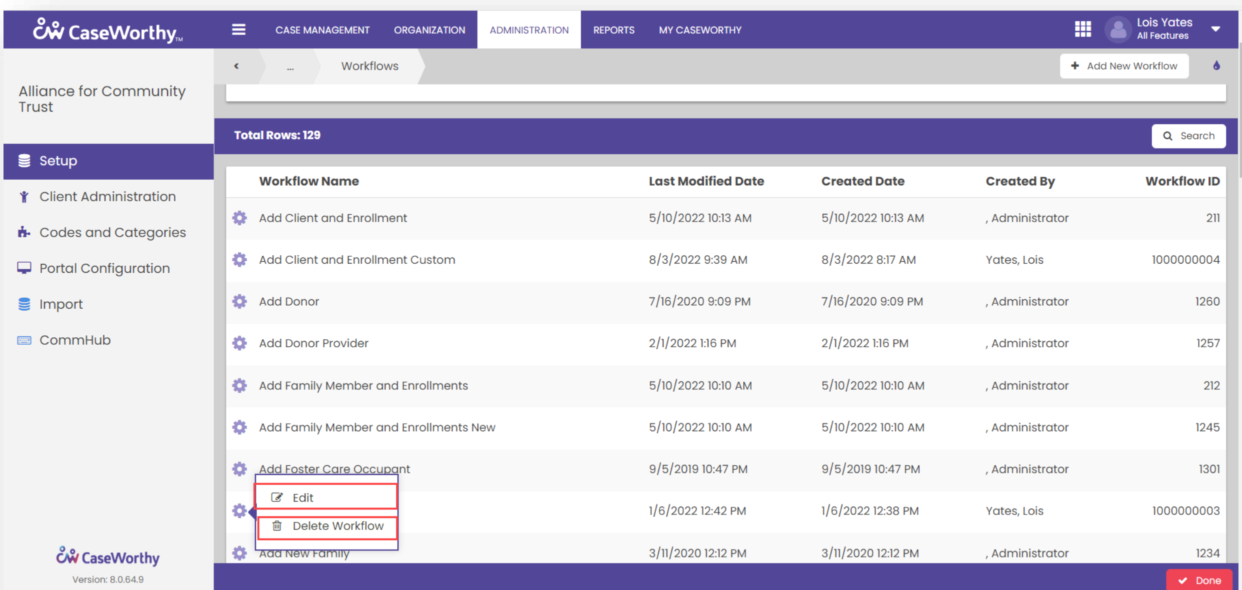
New custom workflows can also be added here with ADD NEW WORKFLOW.

In this video series, we will focus on creating a copy of an existing workflow and then modifying the workflow to meet our needs. This is typically the most efficient method as opposed to creating a new workflow starting from scratch.

From the action gear, existing baseline workflows can be viewed via **Edit** which really only allows for the viewing of the workflow because it is baseline and cannot be changed.



Custom workflows can be edited and deleted.



This concludes the *Workflow apBuilder Overview* video. Next in the series, we will explore all the components of baseline workflows.

Baseline Workflows

This 2nd video of the CaseWorthy *Workflow apBuilder* video series explores the components of baseline workflows.

Access the *Workflows* summary form on the Administration tab, Setup, then Workflows.

Accessing a Workflow

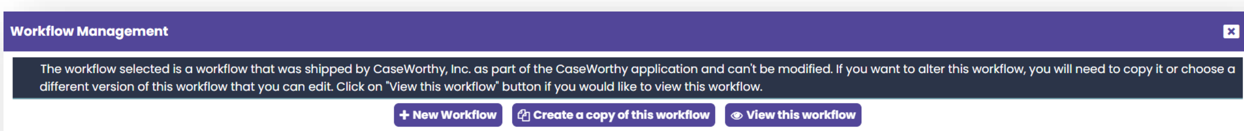
The *Workflows* summary form displays a list of existing workflows, both baseline and custom.

Let us start by reviewing the fundamentals of a baseline workflow. Remember, baseline workflows have an ID of less than one billion.

Because the ID is two hundred eleven, we know the *Add Client and Enrollment* workflow is baseline. Select **Edit** from the action gear to open the Workflow apBuilder.

The Workflow apBuilder opens in a separate window.

Because we opened a baseline workflow, a message displays indicating this workflow cannot be changed. You have three options here.



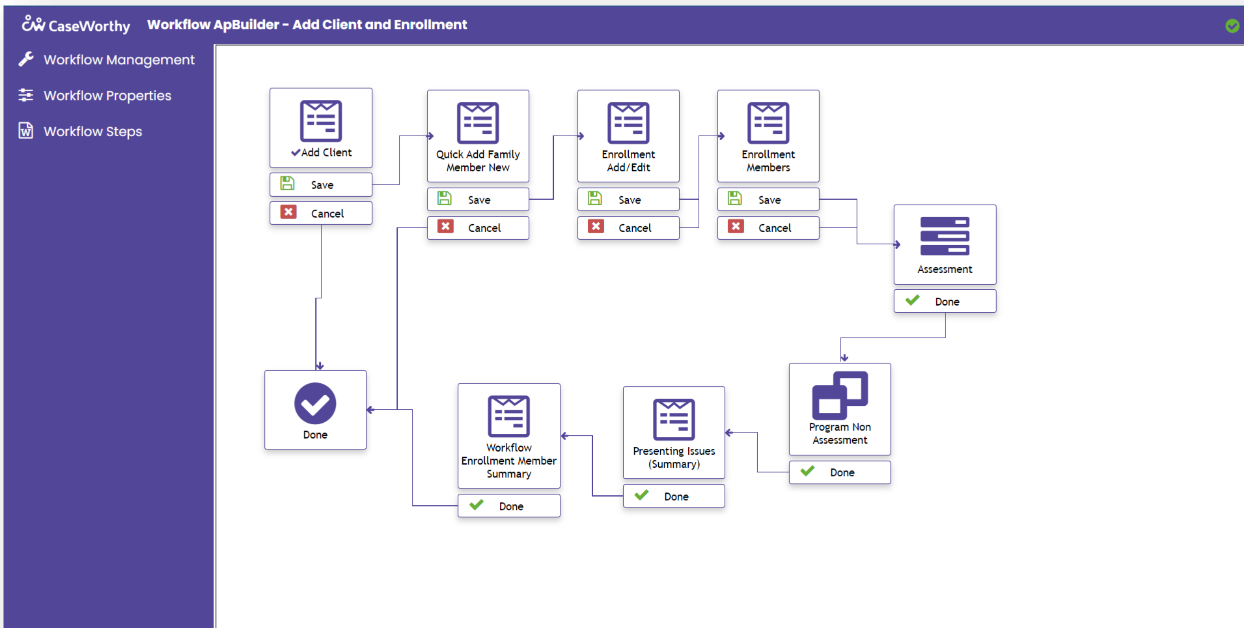
Selecting NEW WORKFLOW begins the process of creating an entirely new custom workflow from scratch. Ideally, we suggest starting with a copy of an existing workflow.

CREATE A COPY OF THIS WORKFLOW allows you to create a copy of this workflow which would be customizable. The copy is automatically saved with an ID over one billion.

For now, we will select VIEW THIS WORKFLOW, which allows us to view the baseline workflow without making any changes.

Baseline Workflow apBuilder Navigation

The Workflow apBuilder is laid out similar to the CaseWorthy application for ease-of-use. The Navigation Menu is on the left and the workspace is on the right.

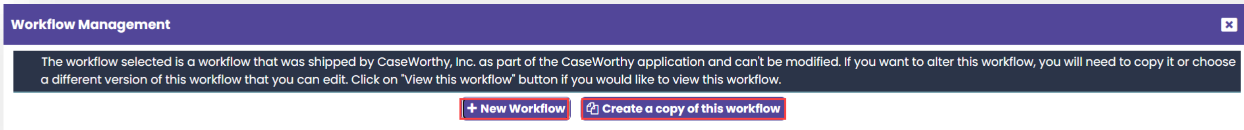


Title

The **title** of the selected workflow displays at the top and cannot be changed as this is a baseline workflow.

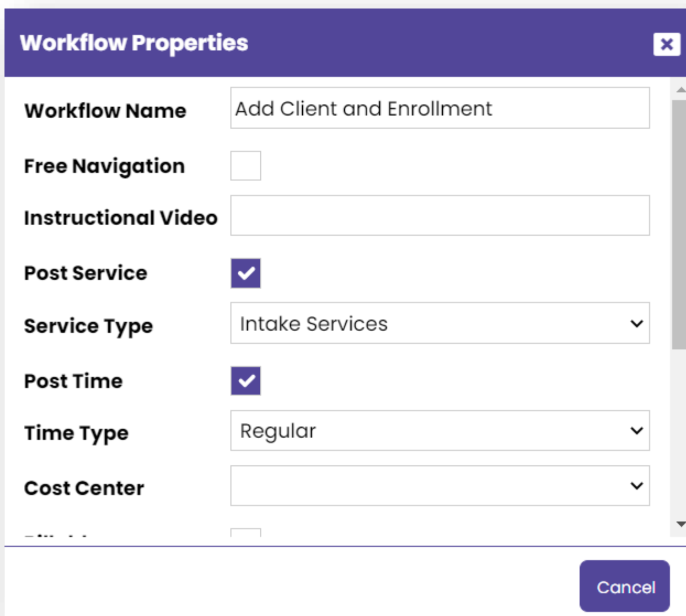
Workflow Management

Within the Navigation Menu, the first option is Workflow Management which gives you another opportunity to create a NEW WORKFLOW or CREATE A COPY OF THIS WORKFLOW.



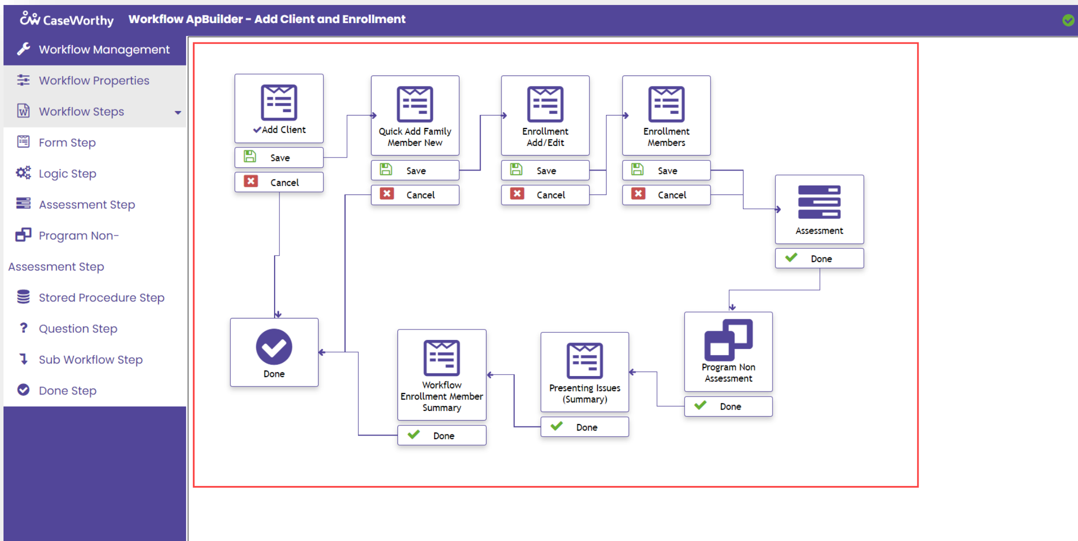
Workflow Properties

Workflow Properties allows you to view the configuration of this workflow, including the title, free navigation setting, if it is set to post a service, etc. Notice free navigation is not enabled, and this workflow is configured to post an intake service.

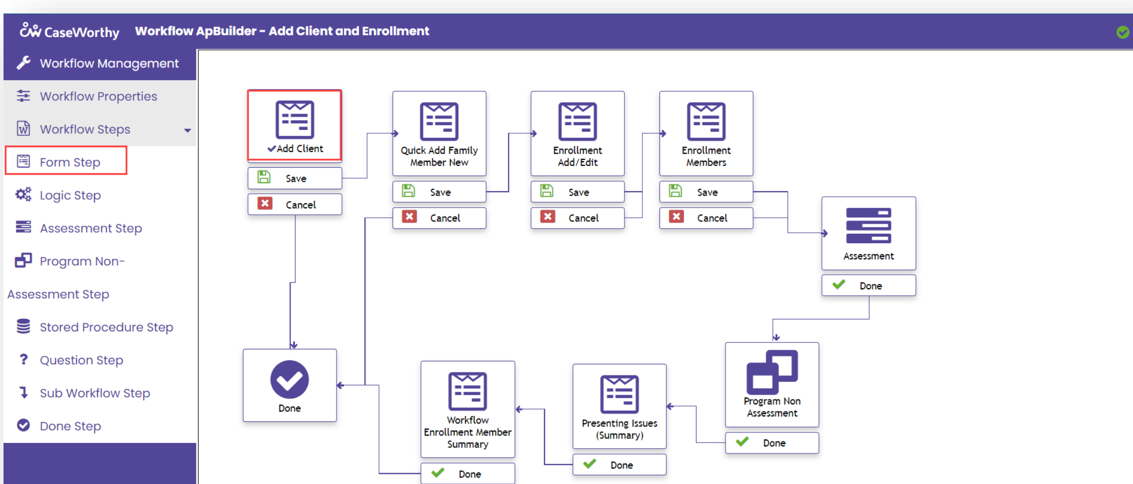


Workflow Steps

Workflow Steps displays the list of different types of steps that exist for configuring workflows. This workflow is configured using nine steps using four step types.



Notice each step in the workspace displays an image that reflects the type of workflow step it correlates with from the Assessment Step Menu on the left. For example, the Add Client Step image is identical to the Form Step icon. This indicates Add Client is a Form Step.

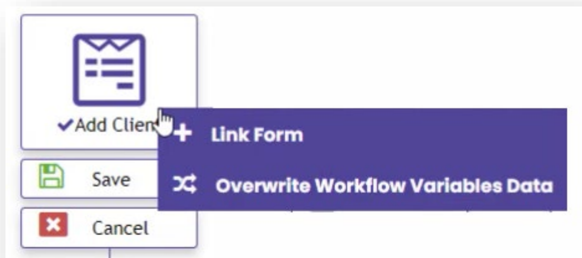


Baseline Intake Workflow Walkthrough

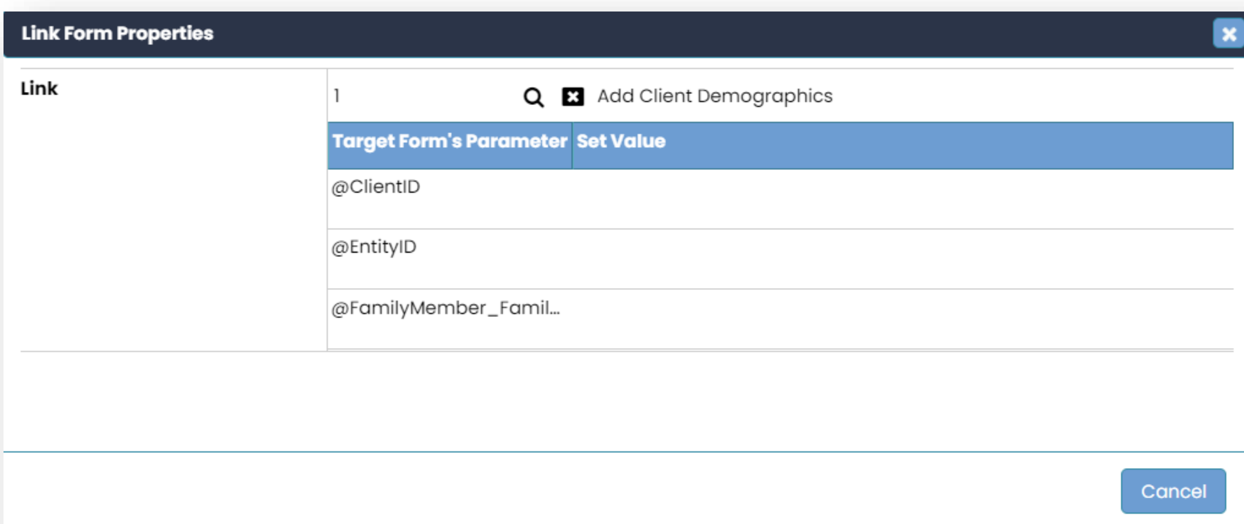
The overall purpose of this workflow is to add a new Client record or search for an existing record, create Client records for family members, if necessary, enroll the family into a program, complete the necessary assessments and non-assessments for the program, and record any issues that may exist.

Add Client

The first step in this workflow is Add Client, which as we have seen, is a Form Step.

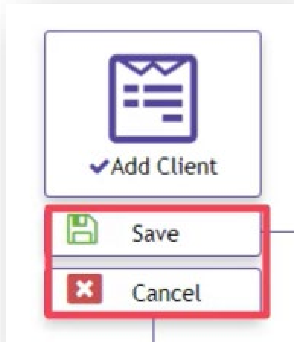


Link Form Properties allows you to view the form for which the step is linked, as well as review the parameters and set values.

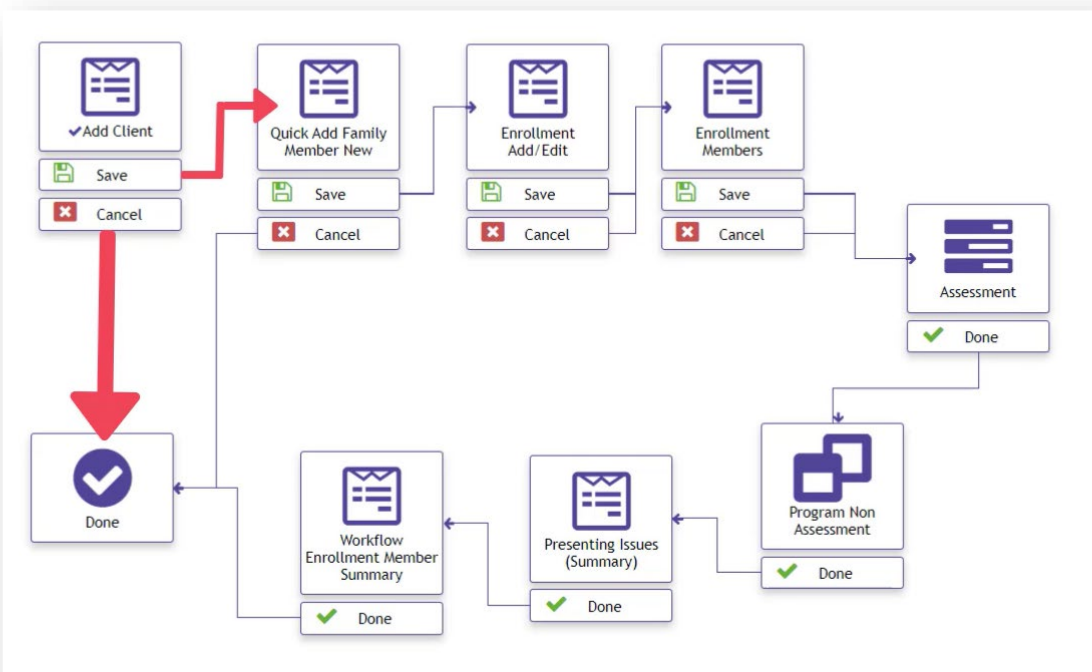


The Client entered during the Add Client Form Step will be referenced by subsequent steps in the workflow.

Notice beneath each step are command controls. These are the buttons that will display at the bottom of each form in the workflow.

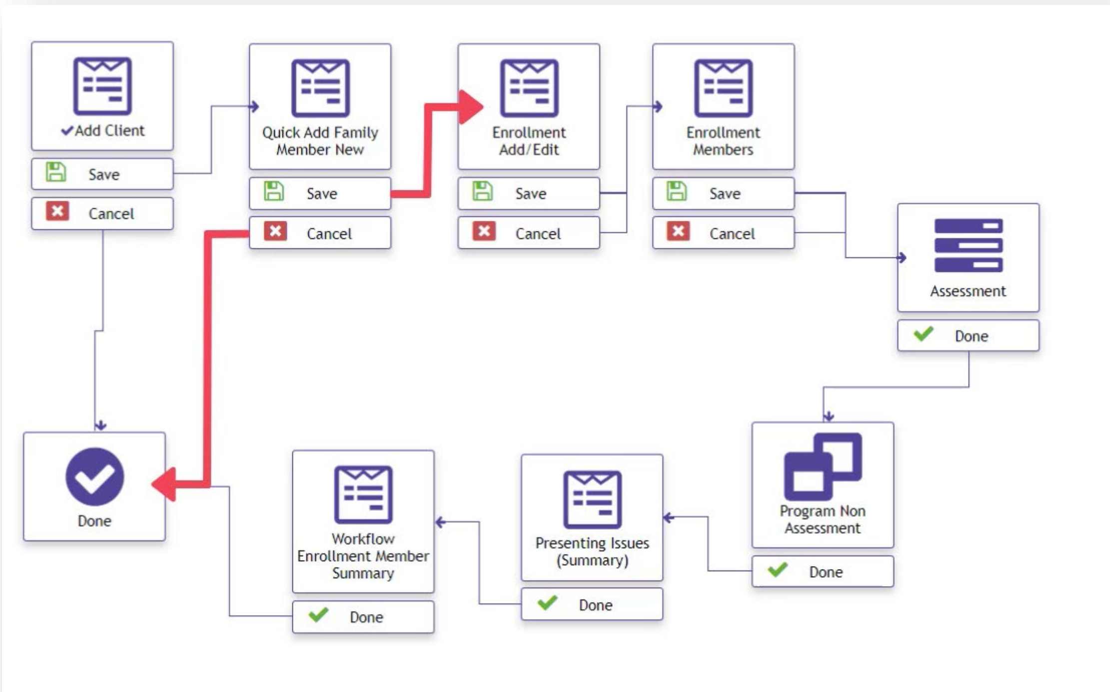


The arrows that display for each command indicate which direction the User will move next in the process when they click the corresponding button.



Quick Add Family Member New

Quick Add Family Member New is the next step in the workflow and is also a Form Step. It is linked to the *Quick Add Family Member* form and allows the User to add family members which can later be included in the enrollment.



If the step is saved, the User is directed to the Enrollment Add/Edit Step. If the step is canceled, the User is directed to the Done Step.

Enrollment/Add/Edit

The next step is Enrollment Add/Edit. This is a form step as well, which is linked to the *Enrollment Add/Edit* form. During this step the User will select into which program the Client is enrolling which is then referenced by the following steps.

Enrollment Members

The fourth step is Enrollment Members which allows the User to select which family members should be enrolled in the selected program.

Assessment

The next step is the Assessment Step, which will present the User with any assessments linked to the program selected in the Enrollment Add/Edit Step for the selected event.

Program Non Assessment

This leads into the Program Non Assessment Step, which will present any non-assessments linked to the program selected in the Enrollment Add/Edit Step.

Event types are not applicable because non-assessments are not triggered by events.

Presenting Issues

Next is another form step which is configured to display the *Presenting Issues* form to record any issues for the Client and family members being enrolled.

Workflow Enrollment Member Summary

The Summary is also a form step. Here it is configured to present the *Enrollment Summary* form. The information that displays includes the enrollment, enrollment members, and if they met the program's eligibility criteria.

Done

The final step in the workflow is the Done Step, which indicates the workflow has been completed. This will display a summary for the User comprising all the steps completed within the workflow.

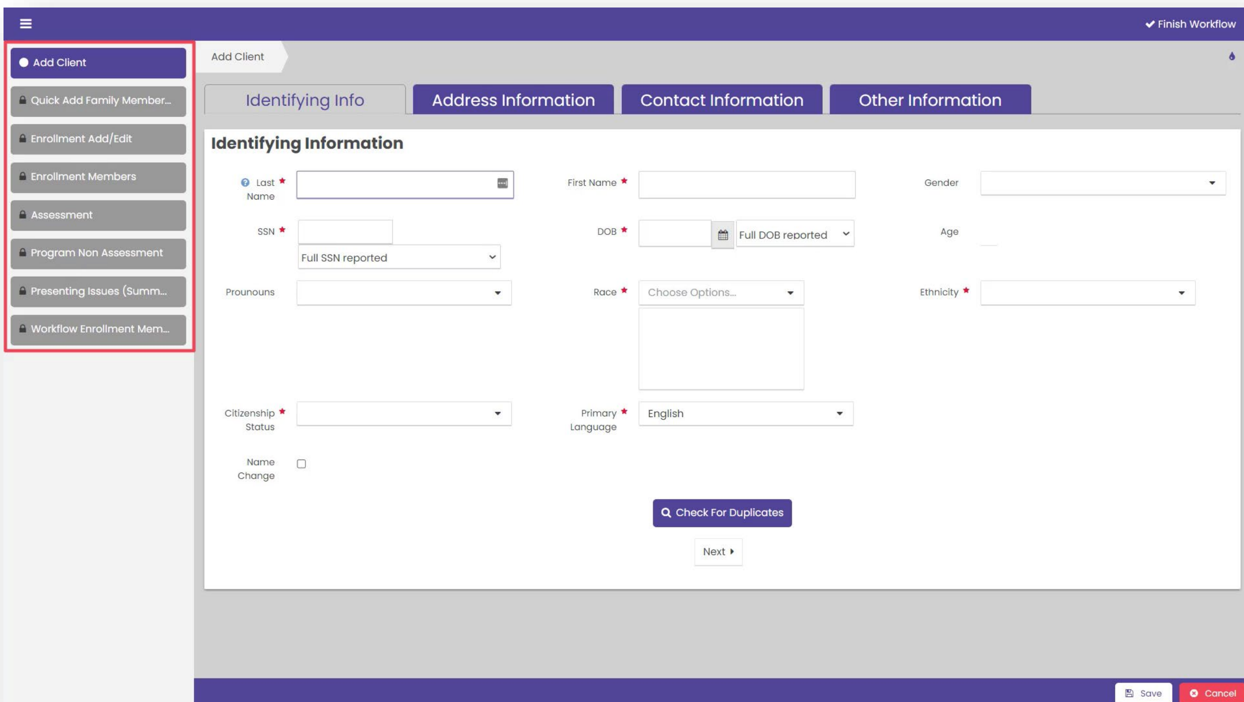
Workflow – User's Perspective

Now that we have reviewed the Administration side of a baseline intake workflow, let us move over to the Case Management tab and see how this same workflow appears for the User.

On the Case Management tab, select Add Client, and then select Add and Enroll Client.

The *Add and Enroll Client* workflow displays in a new window.

The steps that were displayed in the Workflow apBuilder workspace are now all displayed in order along the left of the page.

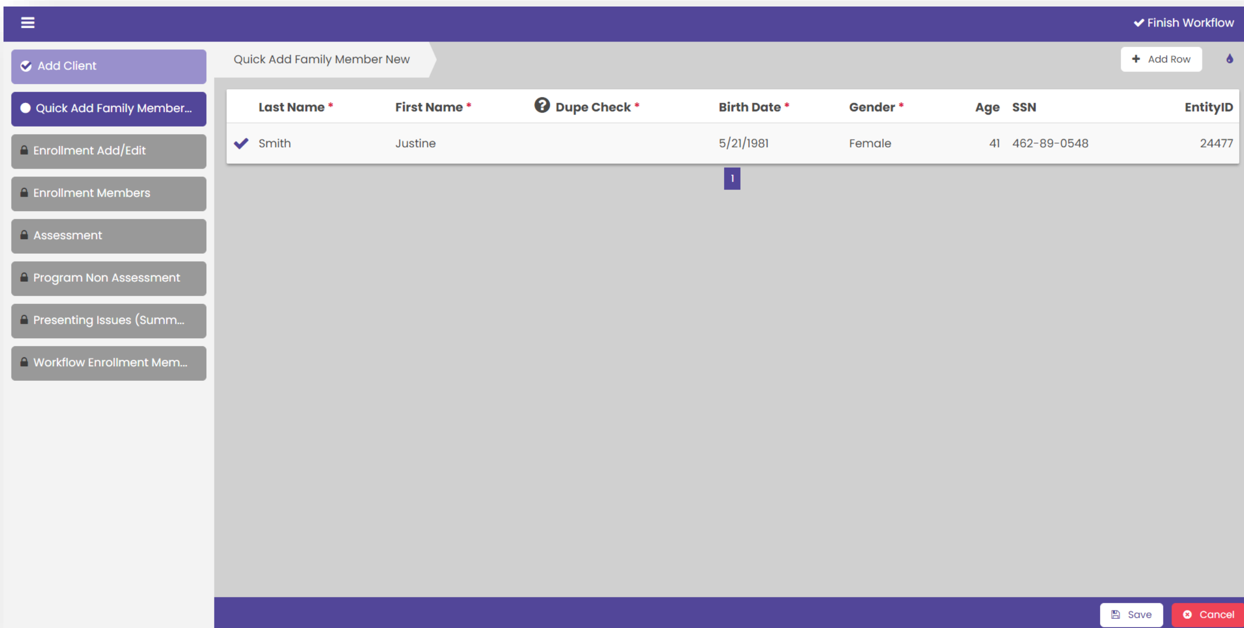


The first step is Add Client, which remember, is linked to the *Add Client Demographics* form. This form presents blank for the User to either create a new Client record or to search for an existing one. Once all required information has been entered on each of the four tabs, click SAVE to move to the next step.

Once saved, if applicable, the new record is created and saved to the database.

While each form is part of the workflow, the form's data is saved at each step when SAVE is clicked. The entire workflow does not need to be completed for each form's data to be retained.

We are now on step two, Quick Add Family Member New.



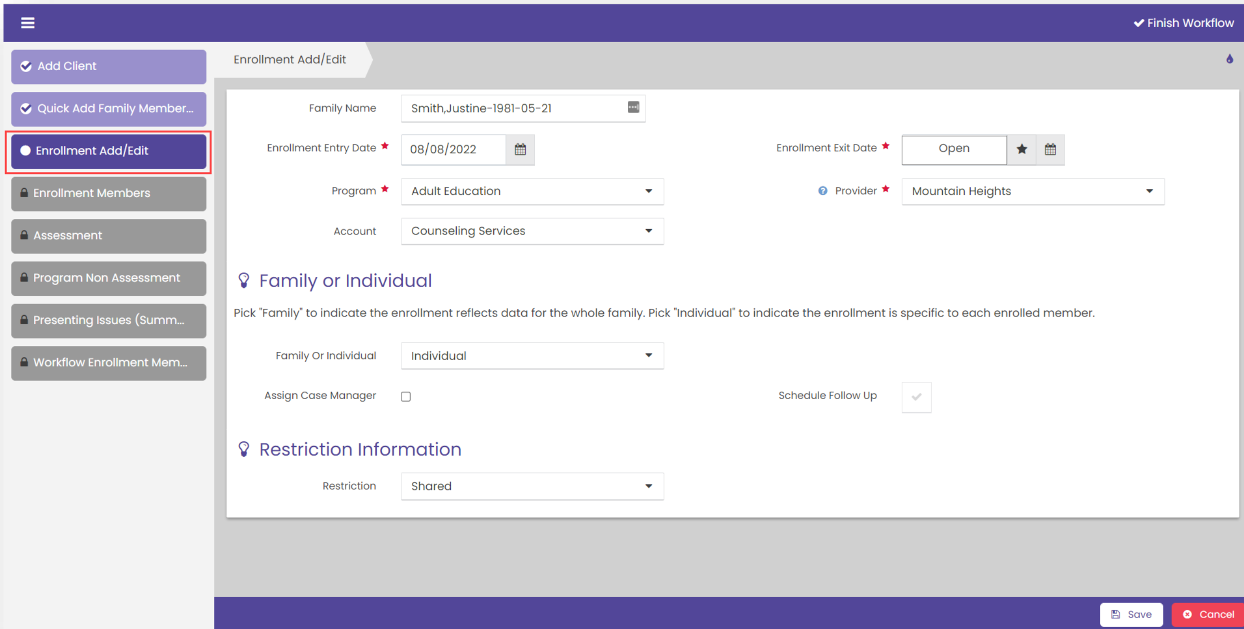
The Client from step one is presented because the step's set parameters state to present all those with the same Family ID as used in the first step. This step is NOT identifying who is going to be enrolled in the program.

If an existing Client was instead selected in the first step and there were other Clients with the same Family ID, they would be listed here.

New family members can be added here as necessary (ADD ROW).

(SAVE)

Step three is linked to the *Enrollment Add/Edit* form. Here, we can easily make our program selection thereby creating the program enrollment record.



The **Family Name** and **Provider** are populated using parameter set values for the Client and the current User.

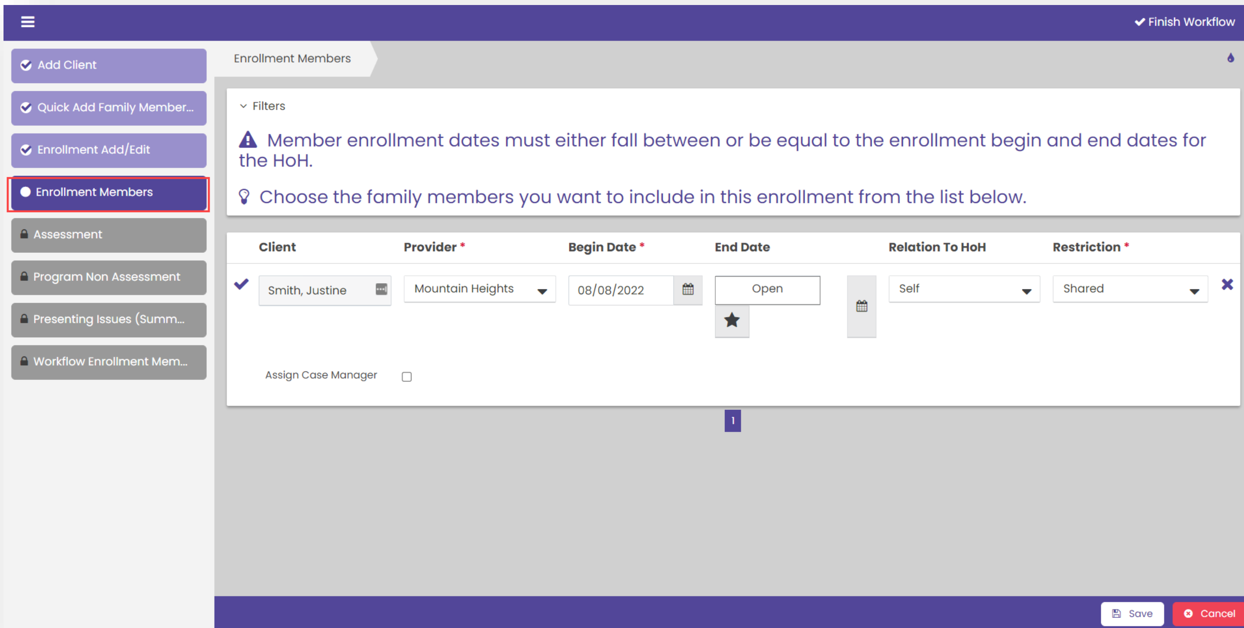
The Program's accounts that have active fiscal calendar display in the **Account** field.

Family or Individual defaults to what was selected on the Program setup form.

The **Case Manager** is also assigned here.

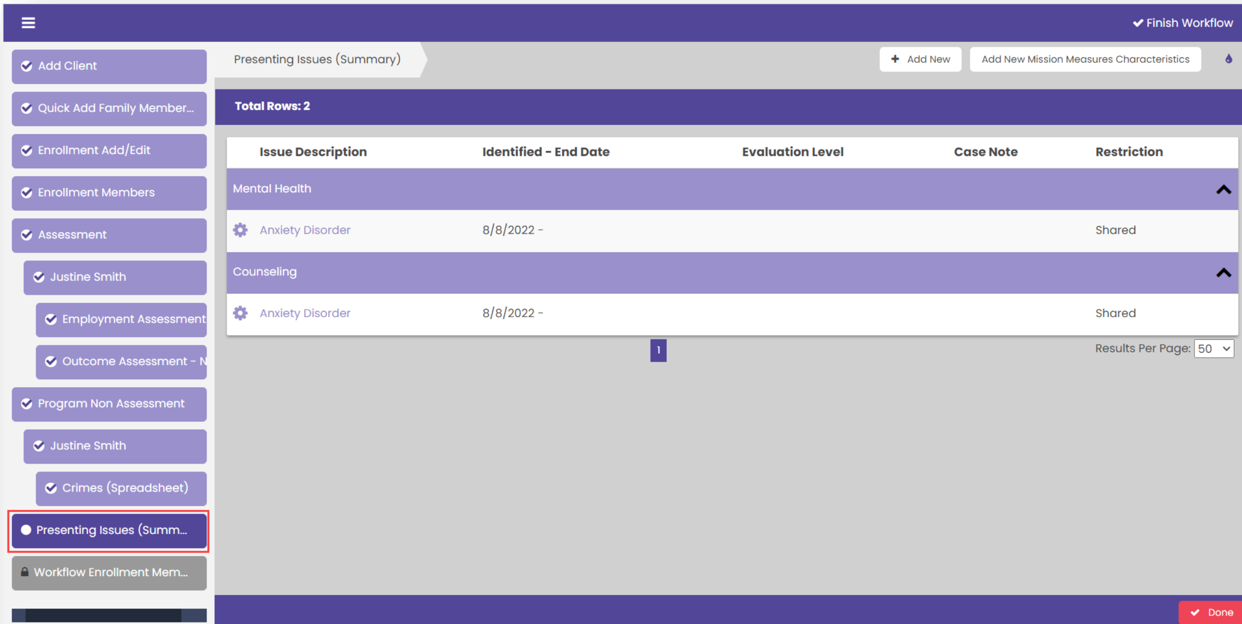
(SAVE)

The Enrollment Members Step allows you to quickly select which members to enroll in the program. Since we did not add any family members, we will only be enrolling the selected Client. (SAVE)



The next steps in the workflow relate to the assessments and non-assessments directly linked to the selected program. In this workflow. the assessments must be completed, and case notes can also be added.

Now that the assessments are complete, notice on the left how we have worked our way down to the Presenting Issues Step of the workflow.



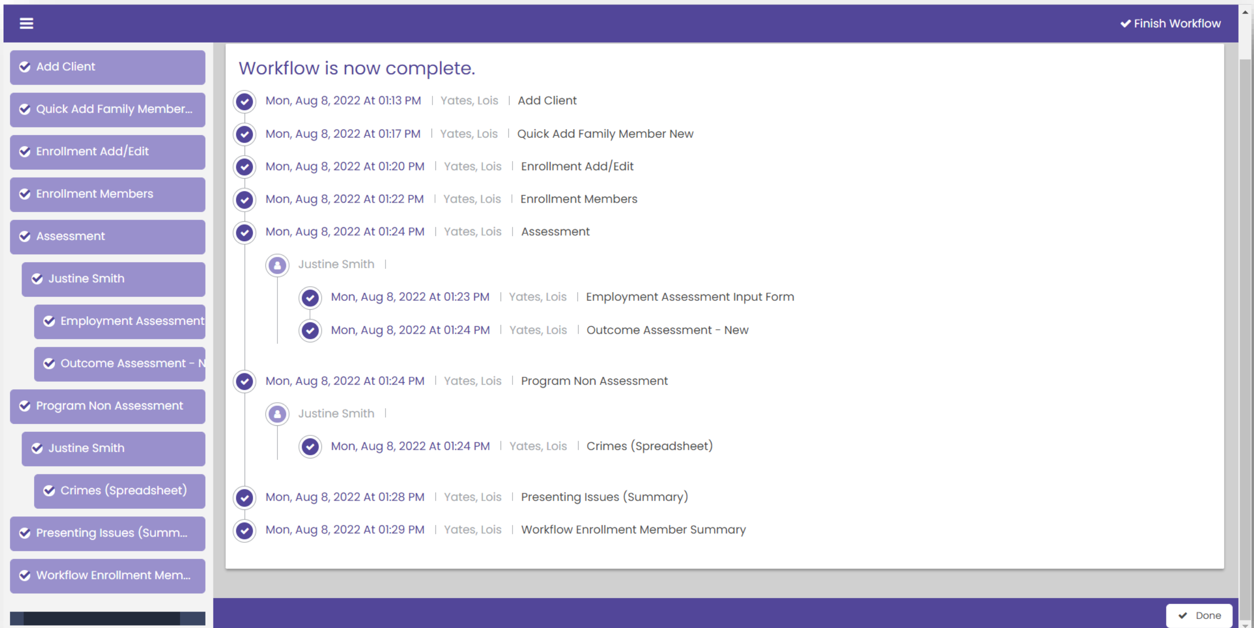
Presenting issues can be added here (ADD NEW) for the Client but are not required in order to complete the workflow.

When DONE, the *Workflow Enrollment Member Summary* form displays with details indicating the Client was either enrolled in the program or eligibility was not met. (DONE)

Status	Program | Assigned Case Mgr	Program Entry - Exit Dates	Eligibility Rule(s) Not Met	Program ID	Enroll ID
Enrolled In Program	Adult Education |	8/8/2022 - Open		482	25521

1 Results Per Page: 50

The final step is what was labeled as the Done Step in the Workflow apBuilder. This step does not display in the Navigation Menu, however, at this point, a summary does appear within the workspace that details each step completed within the workflow.



Clicking DONE here navigates the User to the *Client's Dashboard*.

This concludes the baseline workflow review video. Next in the series, we will explore how to copy and configure a workflow.

Customizing Workflows

This 3rd video of the CaseWorthy *Workflow apBuilder* video series explores how to copy a baseline workflow and customize it using the different types of steps.

Navigation All Features role – Administration tab: Setup > Workflows

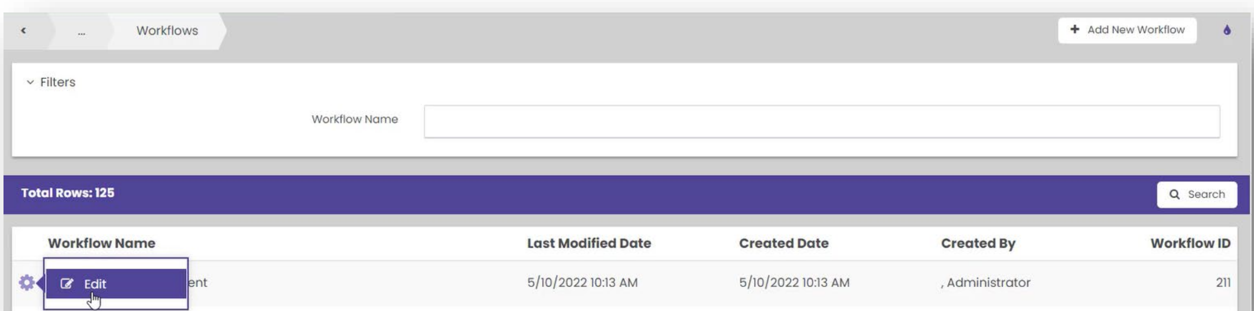
The *Workflows* summary form displays several readily available workflows for your Organization. As they are baseline they cannot be edited, only viewed.

To determine if a workflow is baseline or custom, review the **Workflow ID** column. All baseline workflows have an ID less than one billion while custom workflows are assigned IDs over one billion.

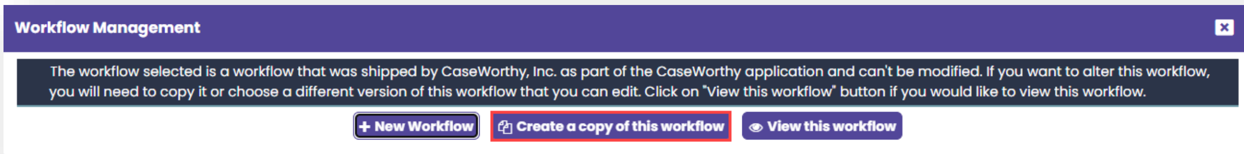
Although you can create a new workflow from scratch, that may involve exerting unnecessary effort, especially in configuring step properties. It is always preferable to identify an existing workflow that could meet your needs with a few modifications. Remember, it is a seamless process to copy and customize the workflow, as opposed to starting from scratch.

How to Copy a Workflow

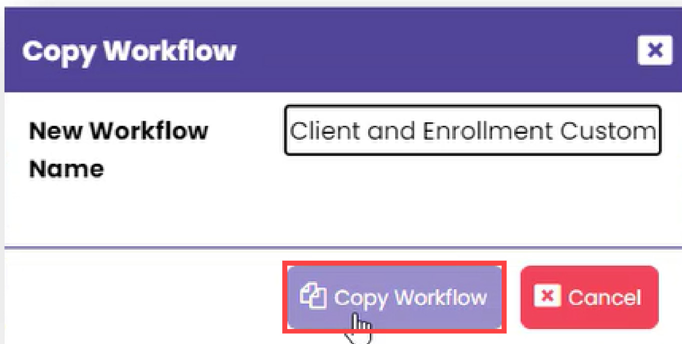
Let us create a copy of *Add Client and Enrollment* to see how this is done. We know this is a baseline workflow because the Workflow ID is less than one billion. (Edit)



In the previous video, we viewed this workflow to examine the components of a baseline workflow. Let us now create our own copy to generate a custom workflow that CAN be edited. (CREATE A COPY OF THIS WORKFLOW)



Immediately, you are prompted to name the new workflow.

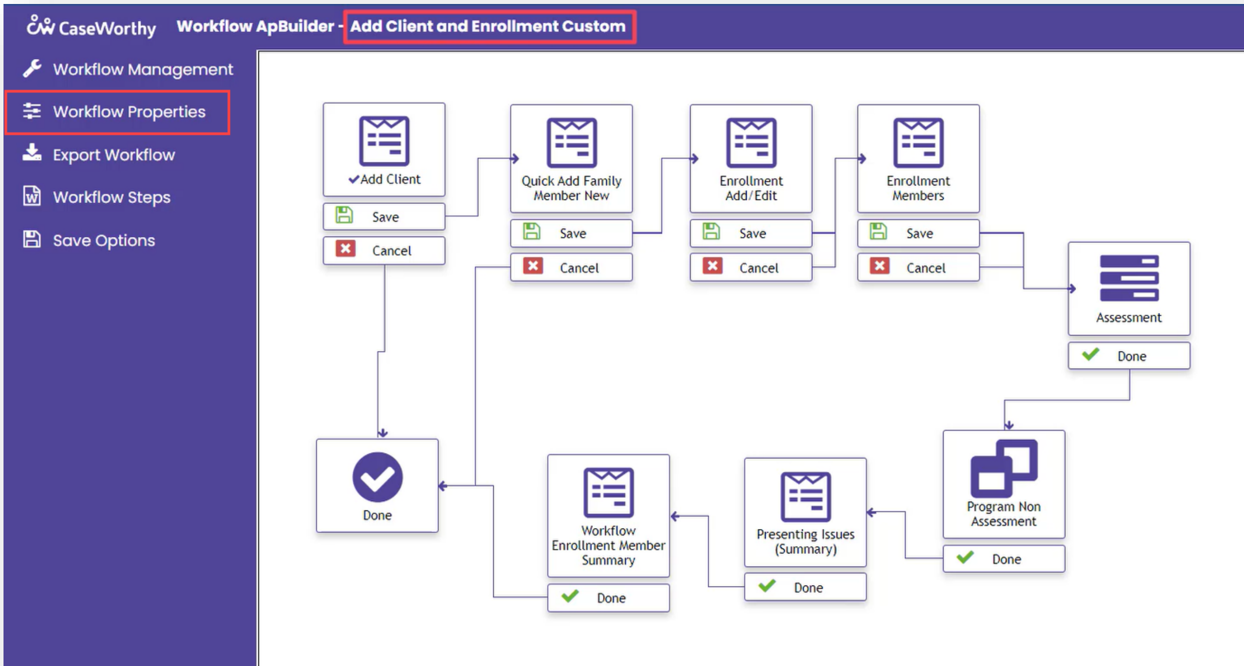


Custom Workflow apBuilder Navigation

The Workflow apBuilder opens in a separate window and is very similar to what we examined in the previous video. The ability to now update and save this workflow accounts for the differences we will encounter along the way.

Title

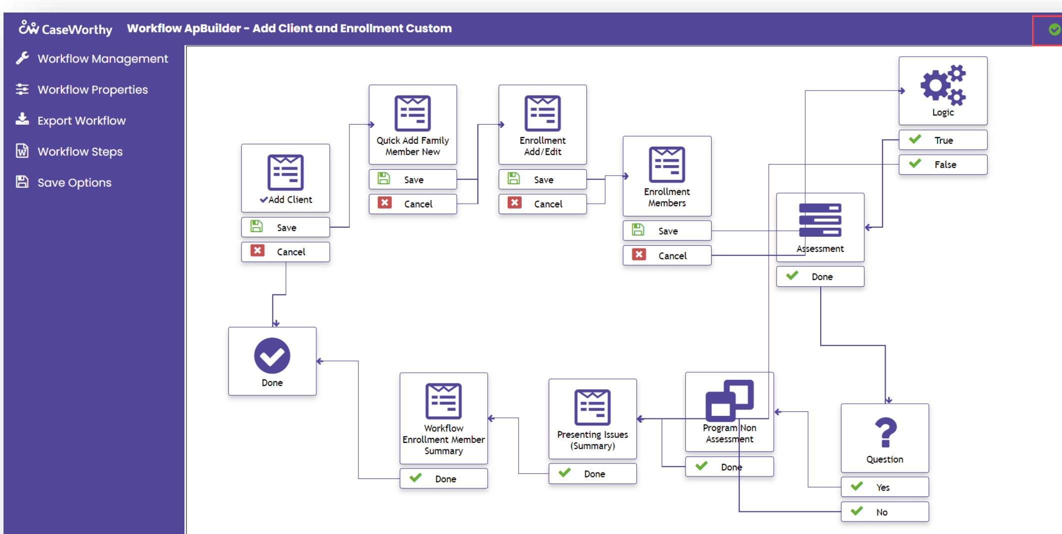
Our new title of the workflow displays at the top. This title can be changed at any time within Workflow Properties.



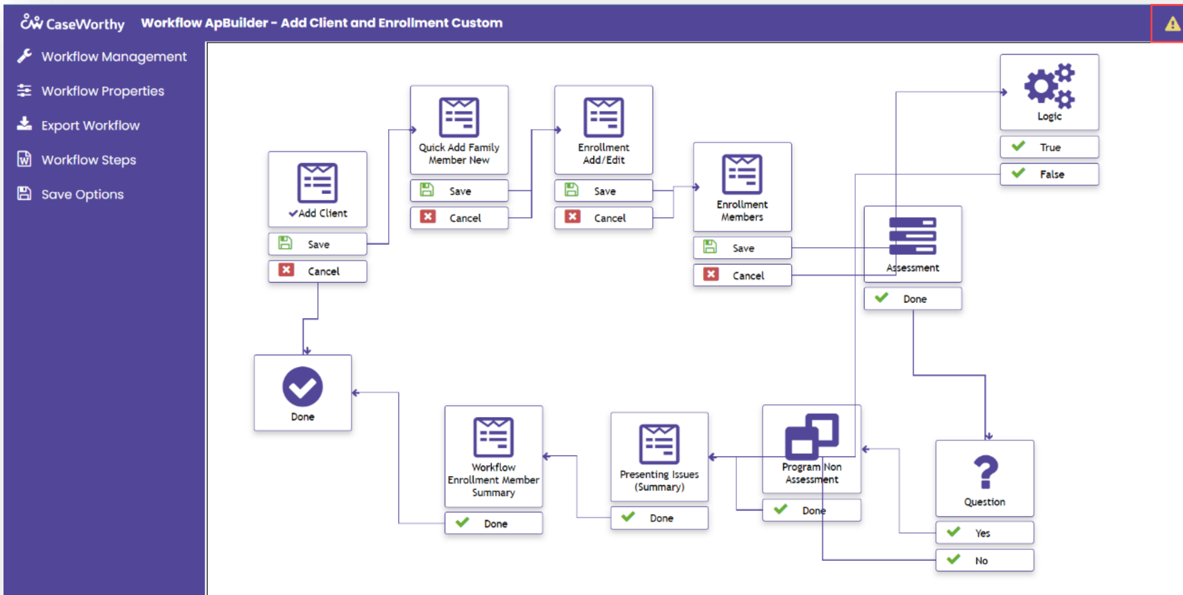
Validation Indicator

In the top right corner, an indicator icon displays.

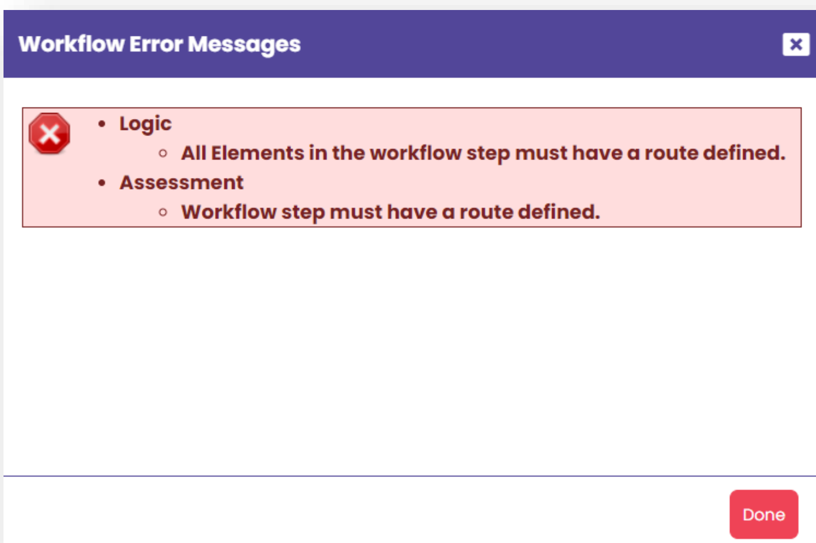
Once the workflow is complete, the goal is to display a green checkmark here to confirm the workflow is configured correctly and will perform as expected for the User.



If there are errors found within the workflow, an exclamation point displays

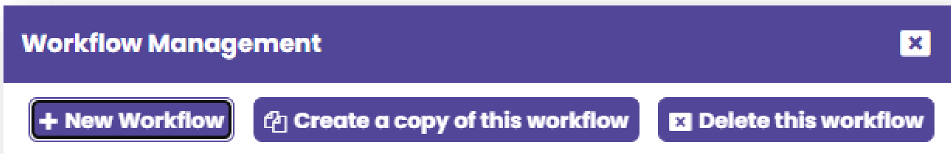


Click the icon to display the error messages, which can then be corrected before releasing the workflow to your Users.



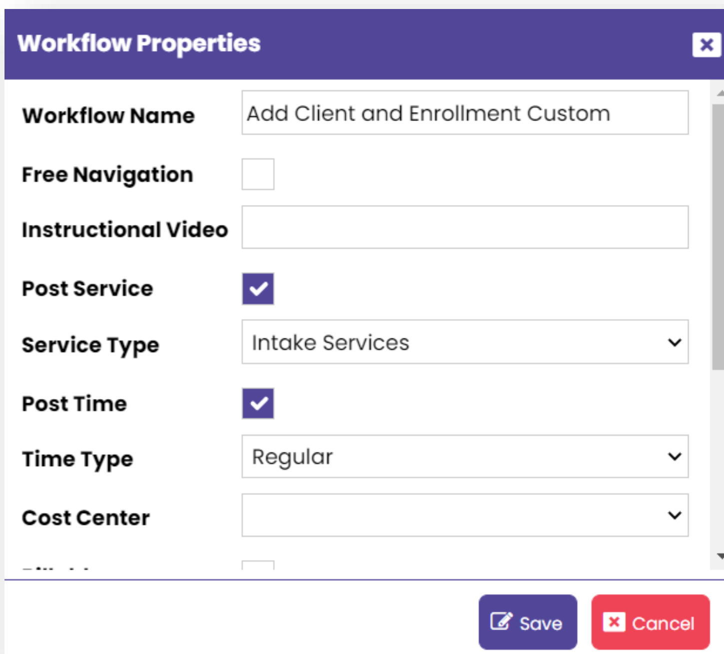
Workflow Management

Along the left of the page is the Navigation Menu. Workflow Management gives you another opportunity to create a new workflow, create a copy of this workflow, and since this is custom, you now have the ability to delete this workflow.



Workflow Properties

The Workflow Properties allow you to view and now edit the configuration of the workflow.



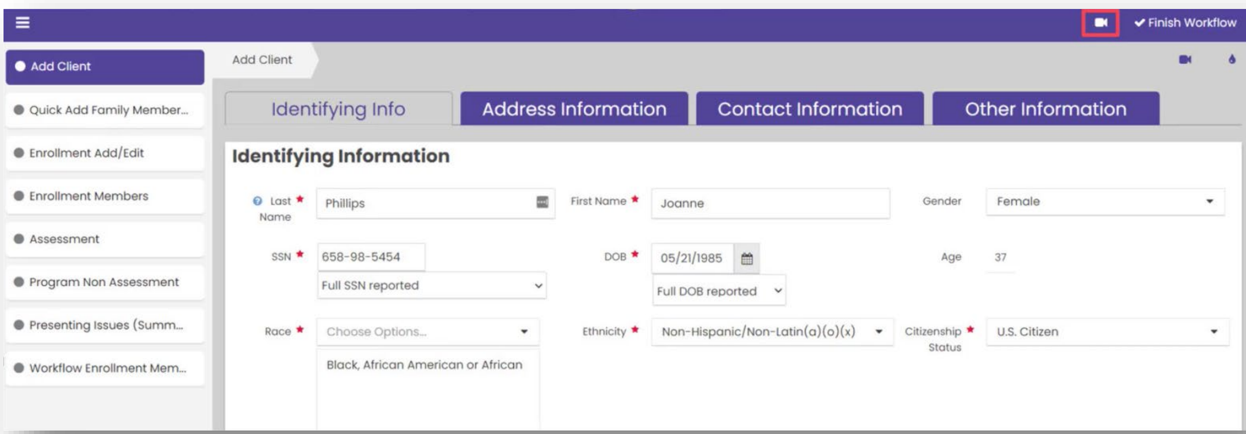
Here, the **Name** can be updated as necessary.

If **Free Navigation** is selected, the User will have the ability to move freely between the steps of the workflow. Otherwise, the User will be led from one step to the next without the ability to move around spontaneously.

When this option is selected, additional properties become available for the workflow steps, which we will review in the *Free Navigation* video of this series.

An **Instructional Video** can also be added to the workflow. First, upload the video to YouTube, and then enter the last part of the link here.

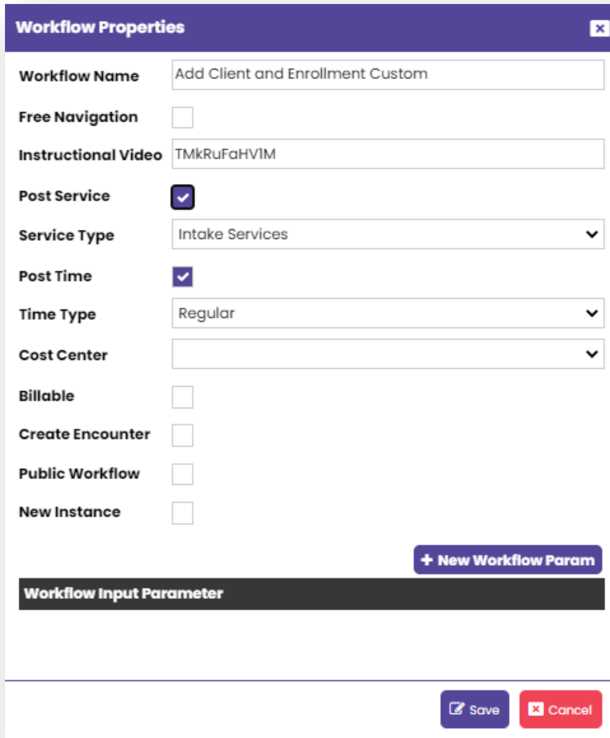
When added, a video icon displays in the top right corner of the workflow, which is accessed by Users to learn more about utilizing the workflow.



Additionally, if the forms used within the workflow also include videos, they will display on each individual form.

Post Service is a method of automatically posting services to the Head of Household's record upon the completion of a workflow. When selected, the specific service is chosen in the **Service Type** dropdown below.

Post Time, **Time Type**, and **Cost Center** are used to post time records to the Client and User. For example, it can be used to capture the amount of time spent completing the process.

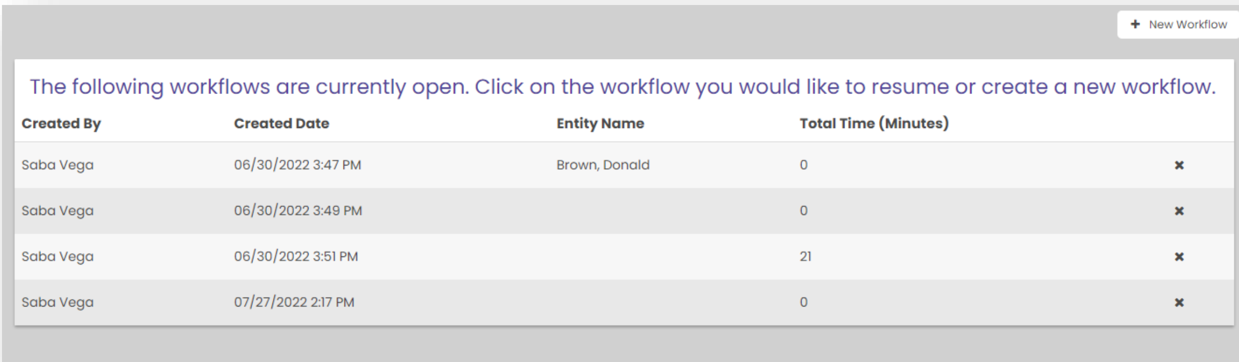


Billable can be selected if this specific time record is something that is billable. We will leave it blank.

Create Encounter is used to capture an encounter record about the time spent completing the workflow if your agency is using the Encounter functionality within CaseWorthy.

Public Workflow is specific to Client portals and makes the workflow available to Clients publicly before creating a portal User account.

New Instance means every time the User opens the workflow, it will create a new occurrence as opposed to providing an option to continue a previously initiated workflow.



Created By	Created Date	Entity Name	Total Time (Minutes)	
Saba Vega	06/30/2022 3:47 PM	Brown, Donald	0	×
Saba Vega	06/30/2022 3:49 PM		0	×
Saba Vega	06/30/2022 3:51 PM		21	×
Saba Vega	07/27/2022 2:17 PM		0	×

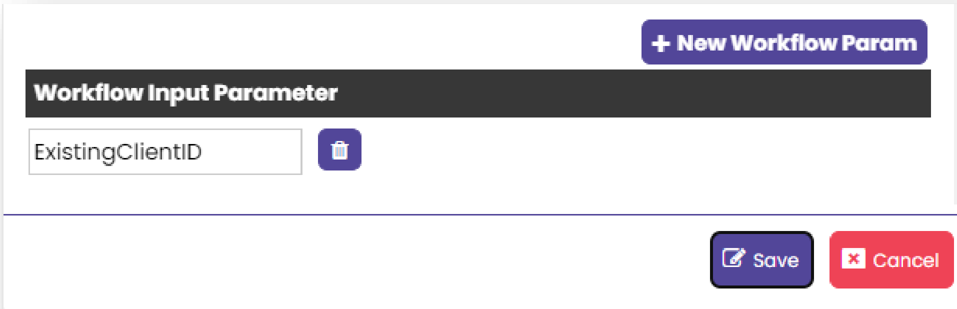
NEW WORKFLOW PARAMETER allows for the creation of a text-based placeholder that can be used to configure the steps of the workflow.

Adding a workflow input parameter here allows you to pass parameters through links to the workflow that can be referenced within the workflow.

For further clarification, a workflow parameter adds a field to reference, even if it is not an actual column in the database. It is a holding location for a value to be stored temporarily. This variable never actually has any data stored since it is not an actual column in a table.

For example, in this workflow, the first action performed is either adding a new Client or finding an existing Client. Therefore, there is no parameter set value.

But, in some cases, the Client might need to be automatically identified, like when completing assessments from the enrollment status. For this purpose, we will enter ExistingClientID.



Multiple parameters can be stored here for reference elsewhere.

Since we entered a variable, it will display as an available option in dropdowns throughout some of our next steps.

Export Workflow

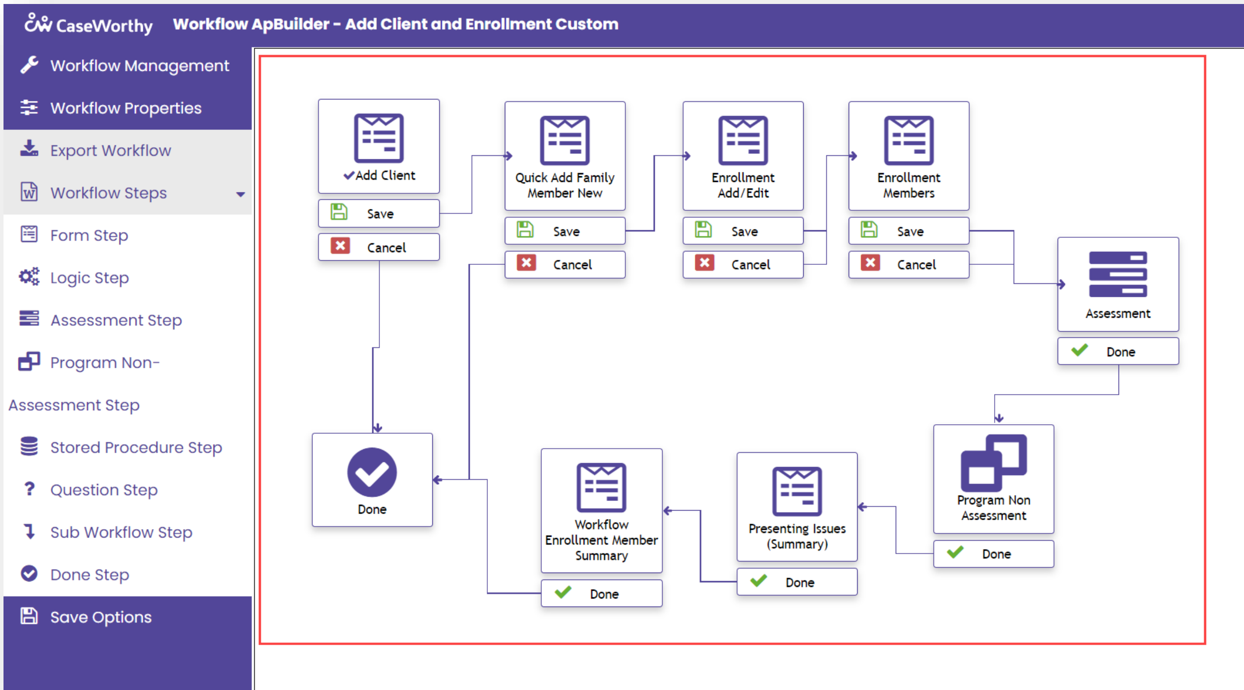
Export Workflow allows you to share this workflow with your other CaseWorthy environments, such as from your Training database to your Production database.

Selecting this option downloads the XML file to your computer. You can then save the file and import the file within a different environment by navigating on the Administration tab to CaseWorthy Object Import.

Workflow Step Types

The next option in the Navigation Menu is Workflow Steps. Here, each of the various steps that can be added to the workflow display, like a Form, Assessment, Question, Logic, and more.

Since we copied this workflow, multiple steps are already configured and display in the workspace. Previously, we walked through these steps as they are configured in the baseline workflow. Now that this is a custom workflow, these steps can be updated and saved.

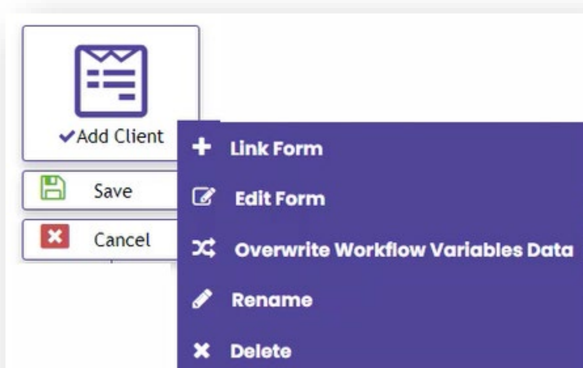


Form Step

The first and most commonly used is the Form Step. While this is a basic step, it is often utilized because it is configured to present an identified form for the User, which can then be populated based on set parameter values.

Within this workflow, there are multiple Form Steps, one of which is Add Client. Let us take a look at the various menu items available here.

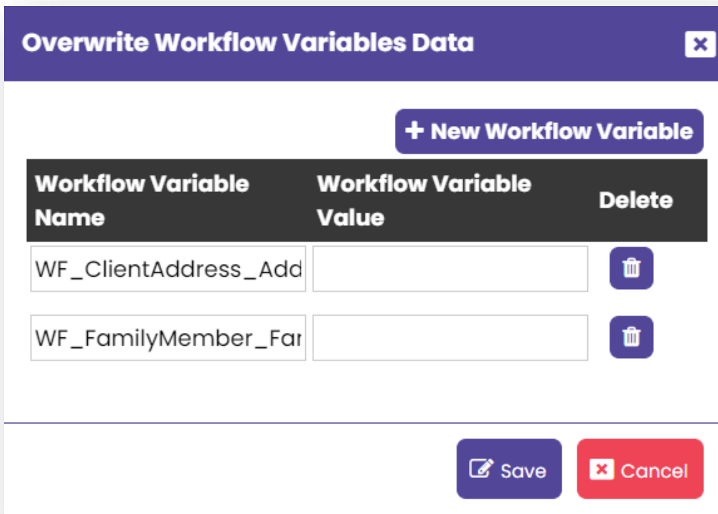
Form Step Menu



Link Form is used to configure the form which is presented in the step. Parameters are an important aspect of this setup, which we detail shortly.

Edit Form opens the Form apBuilder for the linked form. If a form is not yet linked, this option will not display. Here, you can edit the linked form if it is custom. If the form is baseline, it can still be reviewed.

Overwrite Workflow Variables Data is not often used, but it allows for a parameter or variable to be overwritten, if necessary, for example to force a parameter to reset.

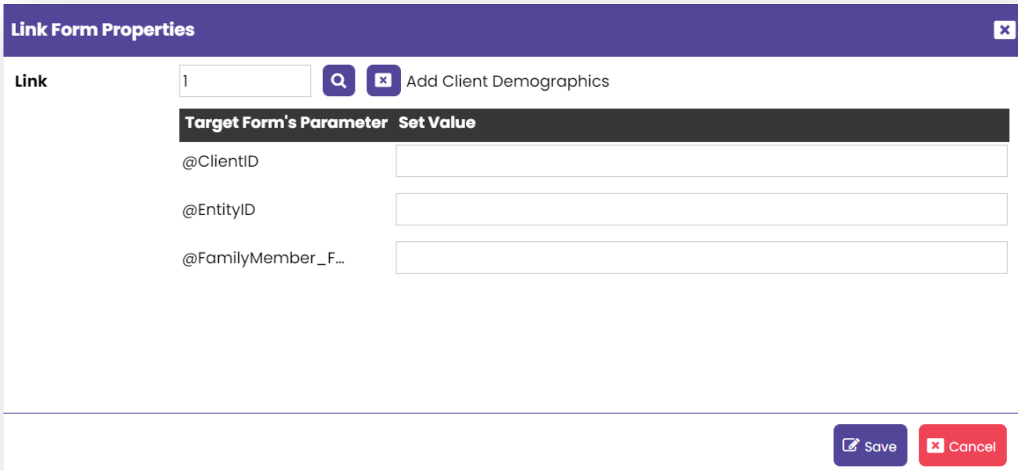


Rename allows you to assign a different title to this step. The step's name displays for the User in the Navigation Menu when working through the workflow. It initially defaults to the form name, which in this example, was *Add Client Demographics*. It has already been renamed and shortened to 'Add Client', which we will leave as is.

Delete permanently removes the step from the workflow. A confirmation message displays to confirm you would like to remove the step.

Form Step Properties

Let us now go back to **Link Form** to review the available properties.



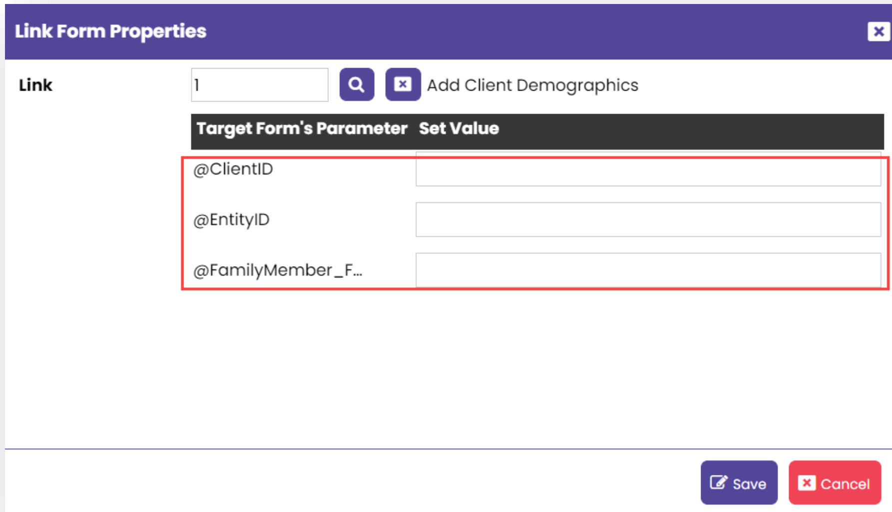
Since we copied this workflow, this form step is already configured. The link is directed to the *Add Client Demographics* form.

IMPORTANT: The *Client Demographics* form is the most likely to be customized form in an agency's database as it collects basic information which is required in reporting. If your agency uses a custom *Client Demographics* form, remember to link it to all necessary workflows in addition to the application links in your custom roles.

To change the form, click the lookup icon, and search for a form by ID, name, or description. We will keep the link as it is for this step.

The **Name** and **ID** of the selected form display here.

The selected form's primary parameters automatically display below.

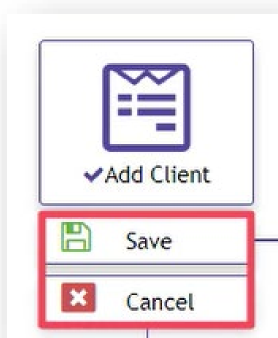


Each parameter **Set Value** can be selected from the dropdown, depending on the needs in the workflow.

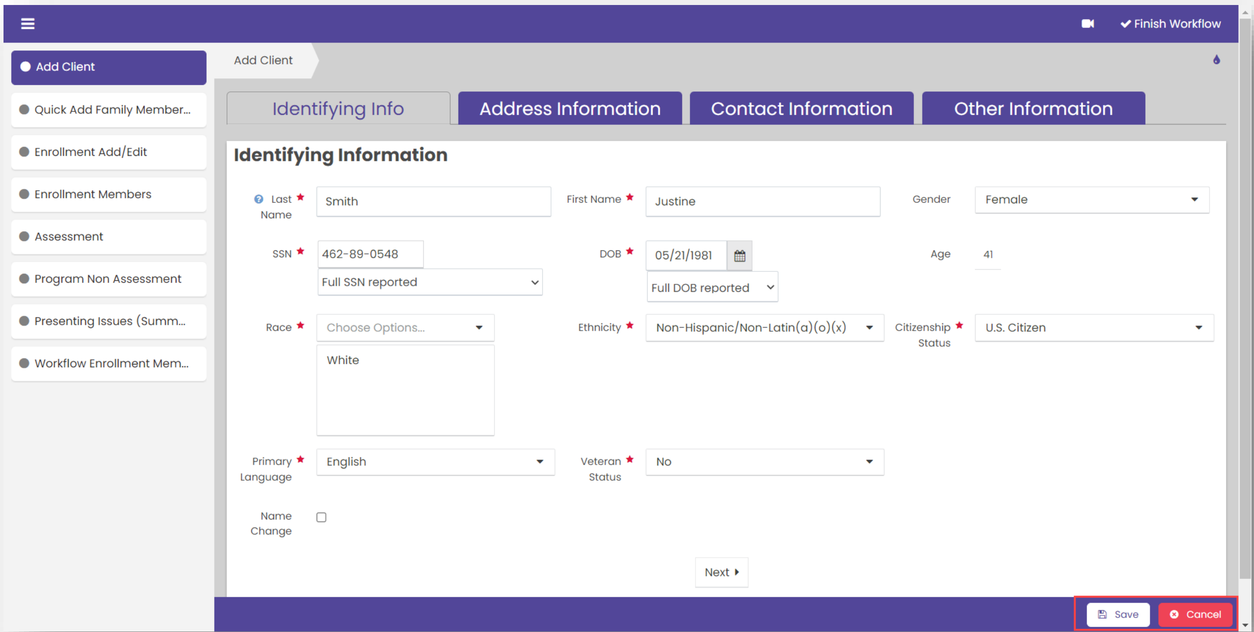
You may be asking, if this form has already been configured, then why are these values blank?

In this step of the workflow, the User will enter the Client's information on the form or search for and select an existing Client. No Client information should display automatically, therefore, these parameter values will remain blank for this step.

Let us move on to the command options below the form step, SAVE and CANCEL.



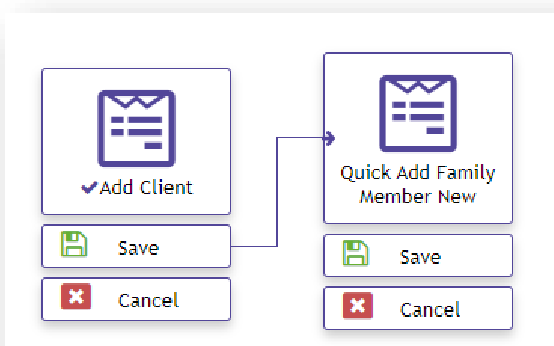
These are the buttons that display on the form



Each button must be configured to identify what happens when the button is clicked by the User.

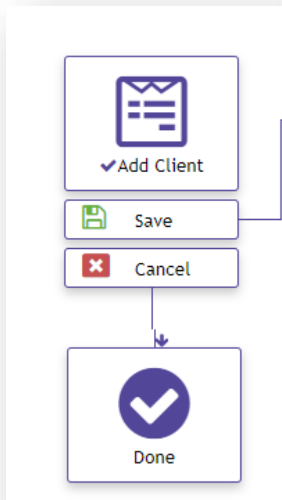
Ask yourself, “What should happen when the User clicks SAVE?”

The User should move to the next step of the workflow, which is the *Quick Add Family Member New* form.



Using drag-and-drop functionality, drag the SAVE button to the next form in the process. An arrow then displays indicating the User will move from step 1 to step 2 when they click SAVE on the form in the workflow.

Let us do the same for the next command button. What should happen if the User clicks CANCEL on this form in the workflow? The process should most likely be Done if a Client is not added or searched for and selected and the User clicks CANCEL.



Then let us create that connection. The linking arrow will appear.

Now that we have completed the configuration for the *Add Client* form, let us move on in the process. Notice steps two, three, and four are forms as well and are configured in the same manner as the first.

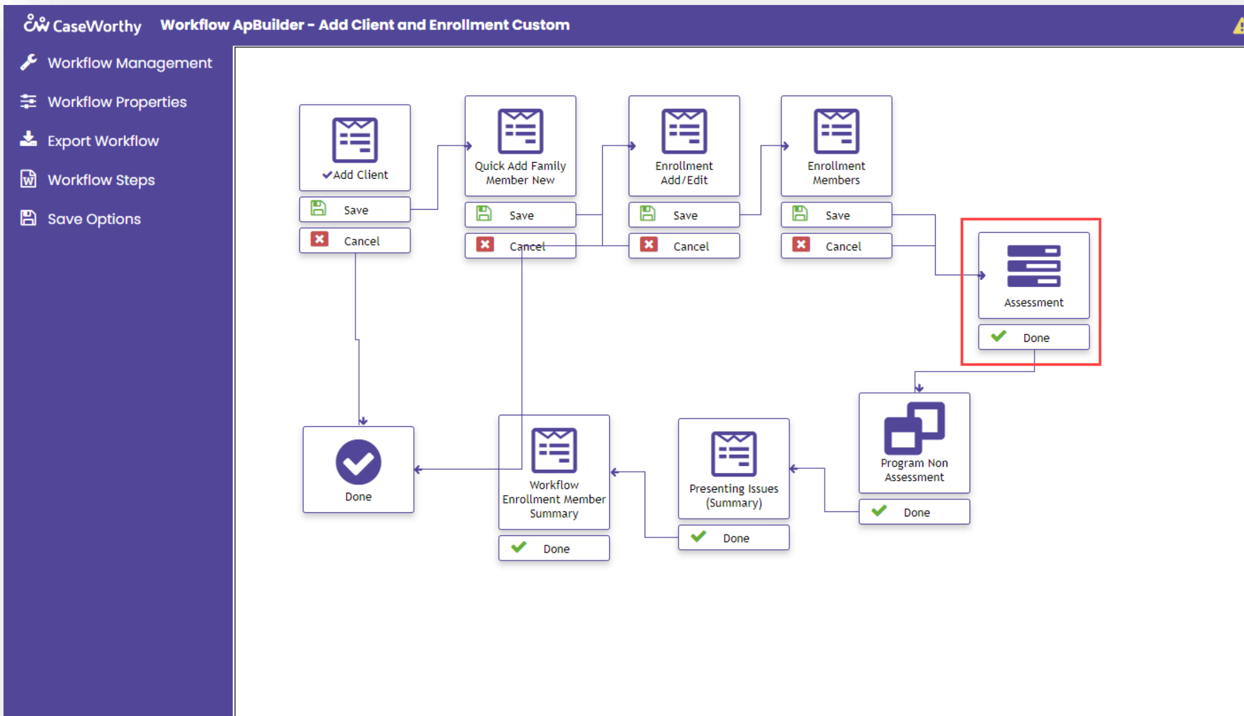
In this workflow, I'm going to update the directions of the command buttons.

If CANCEL is clicked on the *Quick Add Family Member New* form, the User should instead still be directed to the 'Enrollment Add/Edit' form step.

If CANCEL is clicked on the *Enrollment Add/Edit* form, the User should instead still be directed to Done.

Assessment Step

We will skip over to the next type of step in this workflow, Assessment.



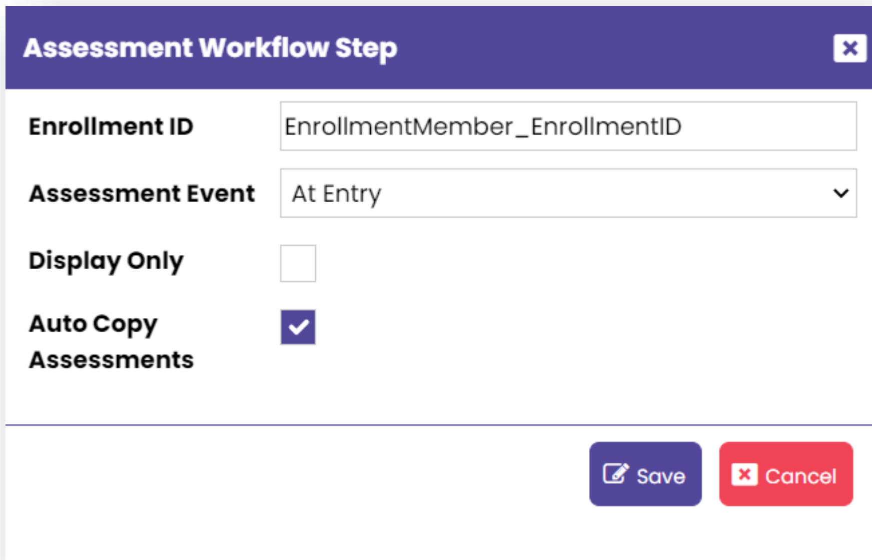
This is another commonly used type and is designed to present all assessments linked to the selected program for the specified event and necessary Clients.

Assessment Step Properties

Link Enrollment ID allows you to set the properties for this step. Here is an example of the benefit of using a copy of a baseline workflow. You are provided access to the pre-configured step's properties.

This type of workflow step is designed to present the assessments which are linked to the program which is selected in the Enrollment Add/Edit Step. Further, this step is configured to only display the program assessments which include the indicated **Assessment Event**.

It makes sense that the **Enrollment ID** should reference the Enrollment Member table's **Enrollment ID** column. This configuration is also used to populate the assessment manager within the workflow.



As this is an intake workflow, 'At Entry' is selected for the **Assessment Event**. An exit enrollment workflow would instead be configured to present all program assessments with the 'At Exit' event.

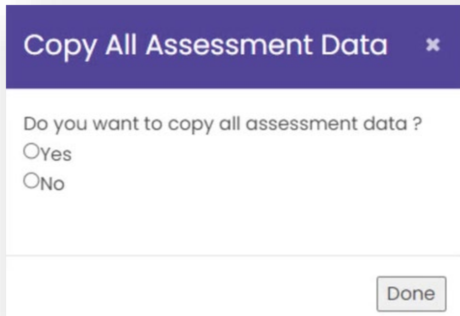
As this step presents the assessments that are linked to the program, the same intake workflow can be used for various programs. This is a robust functionality. It can limit the number of workflows that need to be created and maintained and ensures the consistency of the data that is collected for enrollments into various programs.

If **Display Only** is selected, the assessment will be read-only, data will not be able to be recorded. This might be helpful if questions are to be asked but the answers are recorded outside of the application.

If **Auto Copy Assessments** is selected, the system automatically generates a copy of the previously completed assessment without prompting the User for confirmation to do so.

If the option is selected, the system will present the assessment as a copy of the previously completed assessment. The dialog box that typically appears presenting the option to copy will NOT appear.

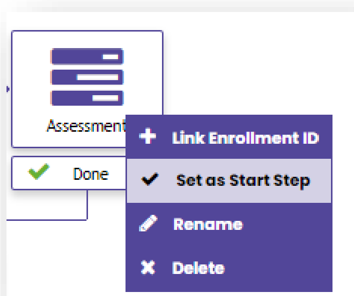
If the option is not selected, a dialog box will display asking if you would like to copy the previous Assessment.



Again, more details about copying assessments can be found in the *Assessments* video reference guide series.

Assessment Step Menu

Back to the Assessments menu, **Set as Start Step** allows you to set this as the first step in the workflow.

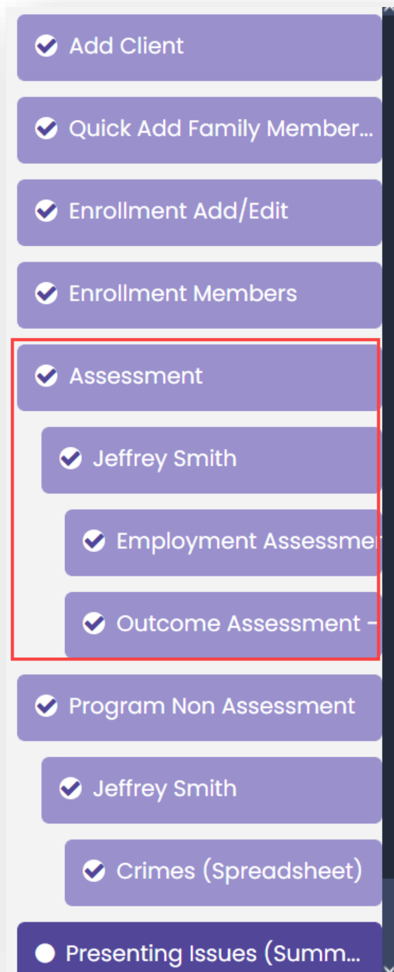


All steps initially include this option in their menu. Once a step is selected as the starting point in the workflow, the option disappears from its own menu.

The Add Client Form Step has already been designated as the starting step for this workflow, therefore, the option is no longer available off its menu.

Any step can be designated as the start step by selecting this option at any time.

Rename is also an option available here which could be used to display something other than 'Assessment' for the User. The names of the specific assessments that are triggered will display their respective names in the Navigation Menu of the workflow for the User as seen here.



And finally, **Delete** will remove the step from the workflow.

Program Non-Assessment Step

The next step in the workflow is Program Non-Assessment. The purpose of this step is to have forms which are linked to programs that are not assessment forms but have them present in the same manner.

There are some key points to remember about non-assessments.

Non-assessments can be used to collect data on each member of an enrollment or just the head of household within a workflow, whereas a form cannot.

Non-Assessments include rules functionality so as to be configured control for which Clients/enrollment members the non-assessment presents.

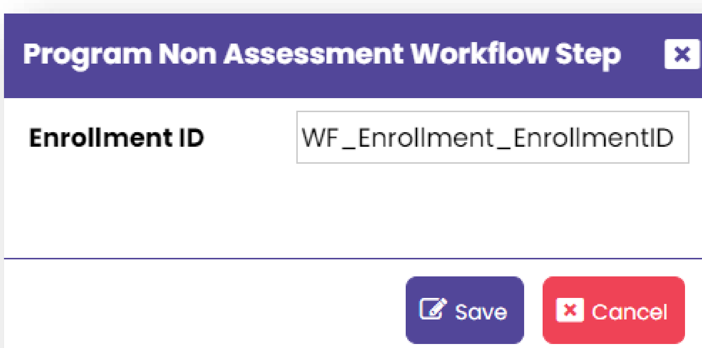
While assessments are designed to collect the same data at different points in time, non-assessments do not, meaning Events are not associated with non-assessments.

Non-Assessment Menu

The same menu options are available as with the Assessment Step. The only notable configuration differences are within **Link Enrollment ID**.

Non-Assessment Properties

Here, you must set the **Enrollment ID** in order to present all non-assessments linked to the program. Preferably, this should be set to WF_Enrollment_EnrollmentID, which is how the program that was selected in the workflow can be identified.

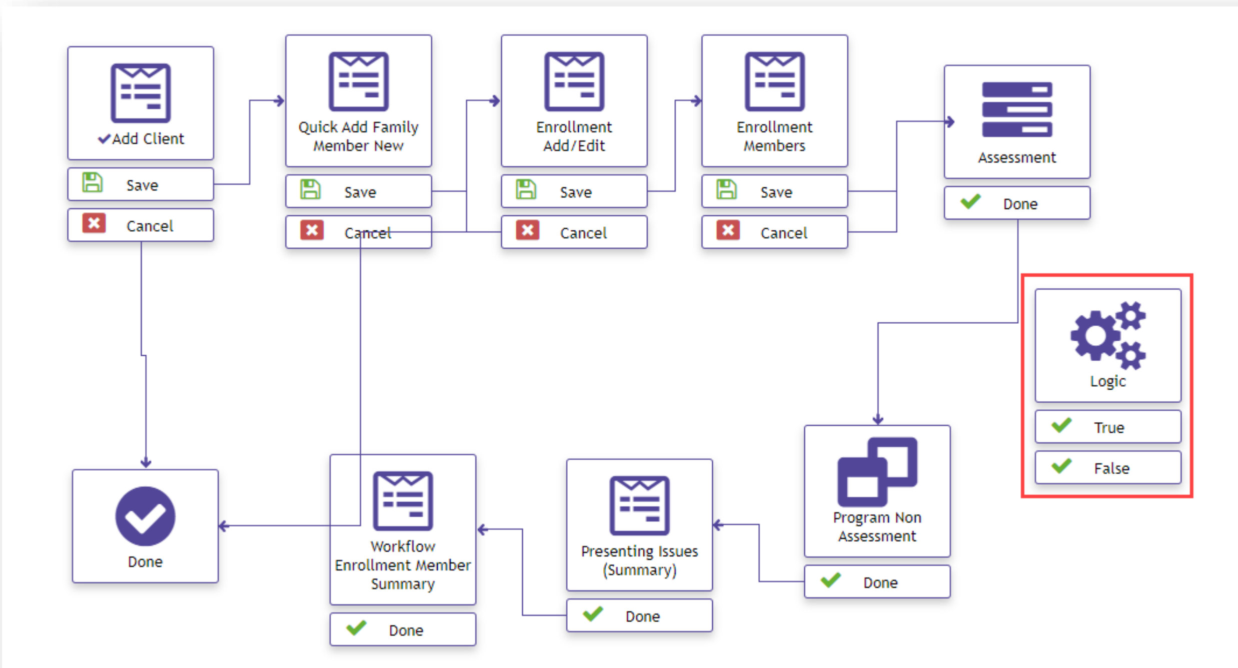


Logic Step

The Logic and Question Steps are used to direct the User through the flow of the process by either automatically determining the next step based on logic configured rules, or by asking the User a question.

Adding a Logic Step is similar to configuring rules as we have done in Program Eligibility and Assessments. The logic is set to either equal true or false.

Let us add a new Logic Step before our *Assessment* form.

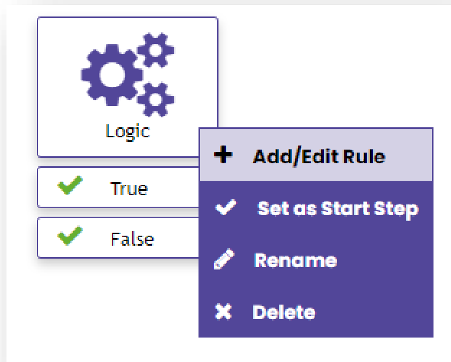


In this scenario, we will add logic based on the Client's age.

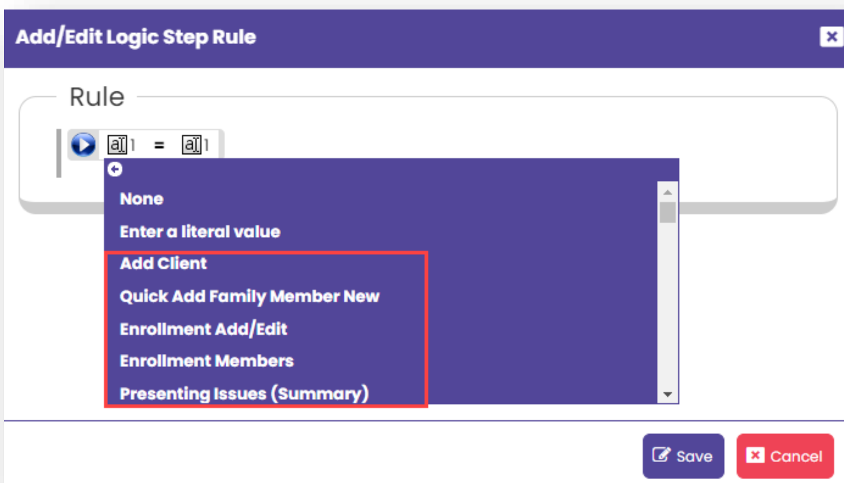
- If the Client is 18 or older, which will be true, the User will move to the Non-Assessment Step in the workflow.
- If the Client is under 18, which will be false, the User will not need to complete the Non-Assessment Step for the Client.

Logic Step Add/Edit Rule

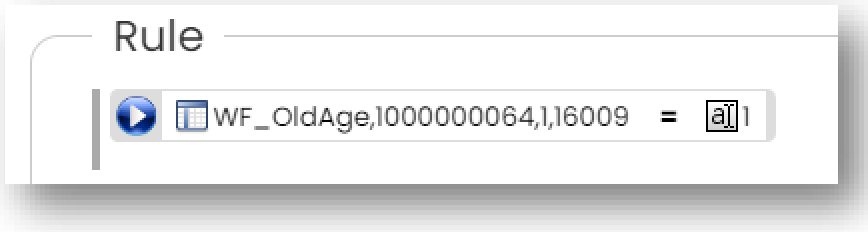
Here, we can add the rule to the step.



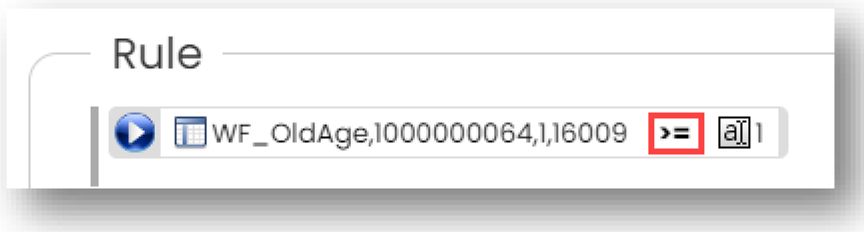
This rule allows for the selection from forms which are included in the workflow.



Because we are looking at the Client's age, we will select the 'Add Client' form, and then select the 'WF_Old Age' field.



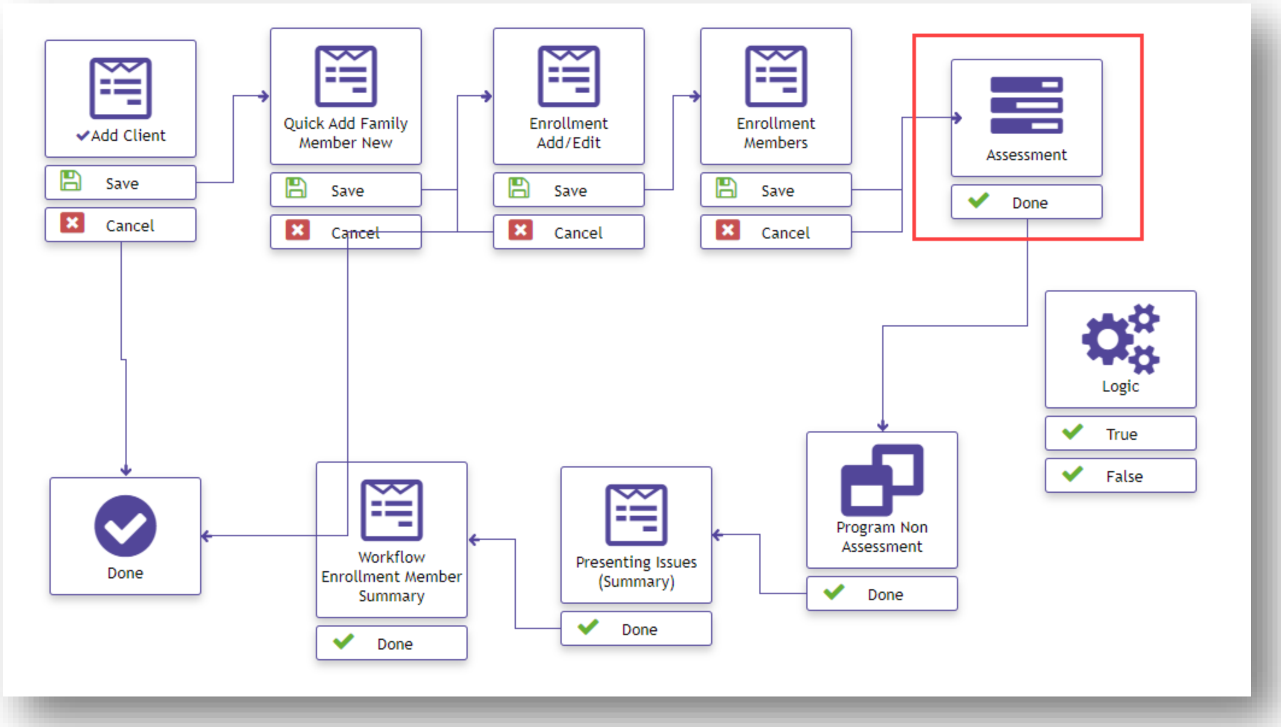
In order to make the rule true, the Client needs to be greater than OR equal to 18. Let us then change the equal symbol to greater than or equal to.



The last part of the equation should then be a literal value of 18, which we can enter here.

Now that our rule is saved, we need to address the flow of the process, both before our new logic step, and after.

At this point, the Client and family members have been added, enrollments have been carefully chosen, and Assessments are completed.

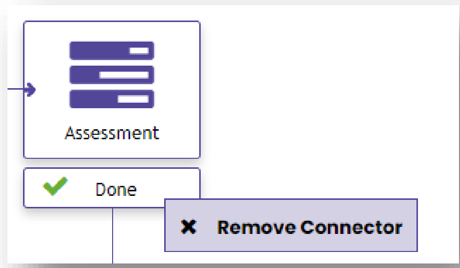


Once we arrive at the Logic Step, we want to determine which step the User should continue to next, the Program Non-Assessment Step or Presenting Issues Step.

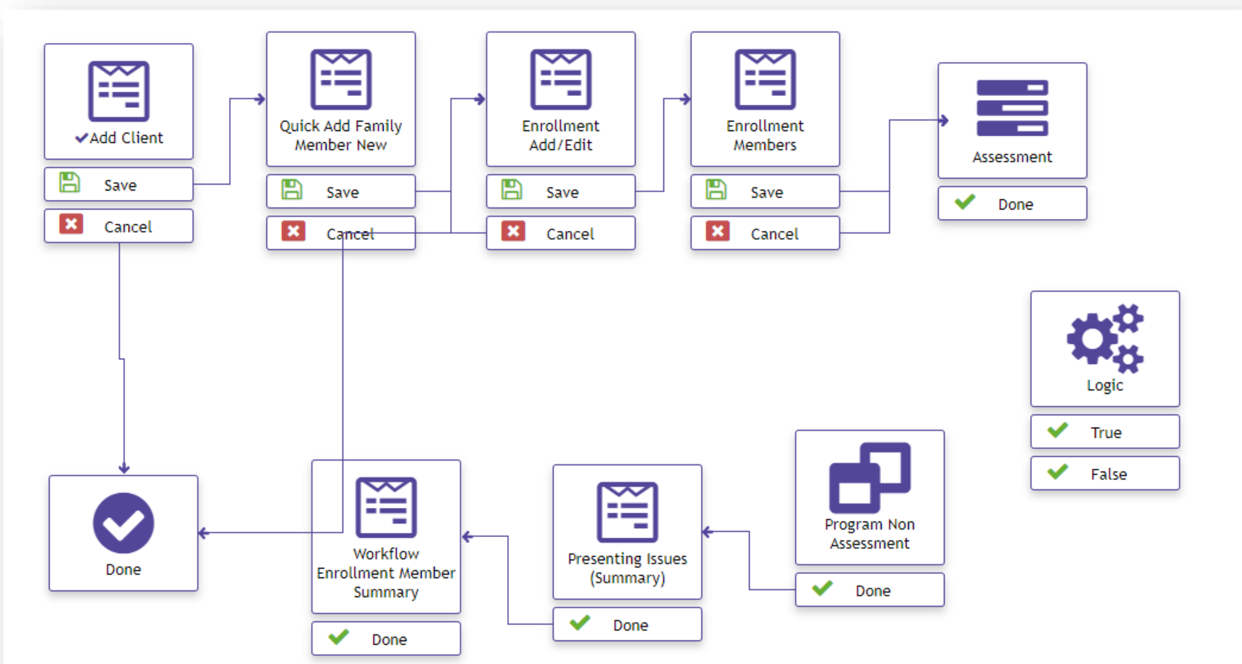
Our new Logic Step will identify if the Client is 18 or over. If yes, then the User will be directed to complete the Program Non-Assessment Step. If the Client is under the age of 18, the User will bypass Non-Assessments altogether and will move directly to Presenting Issues

By using the drag-and-drop feature like we did with the SAVE and CANCEL command buttons previously, we will make the following changes:

First, any connectors that were previously configured will need to be removed.



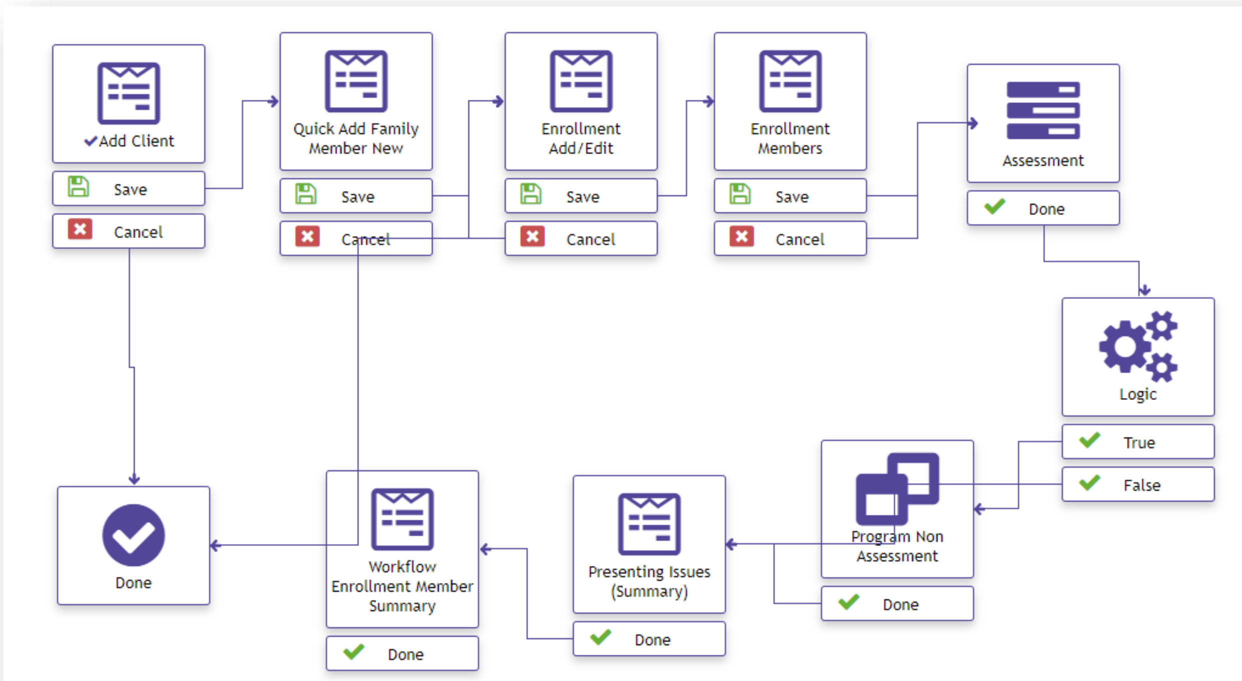
Now the new flow can be added.



The Assessment DONE button will lead to the Logic Step.

If the Logic Step is TRUE, the User will move to the Non-Assessment Step

If the Logic Step is FALSE, the User will move to the Presenting Issues (Summary) Form Step.



Now, once the User completes the Assessment Step and clicks DONE, the system will automatically determine if the Client is 18 years old or over. If yes, the User is directed to the Non-Assessment Step. If no, the User is directed to skip non-assessments directed to the Presenting Issues Form Step.

Remember, this same logic can also be built into assessments and non-assessments when they are linked to programs.

Logic Step Menu

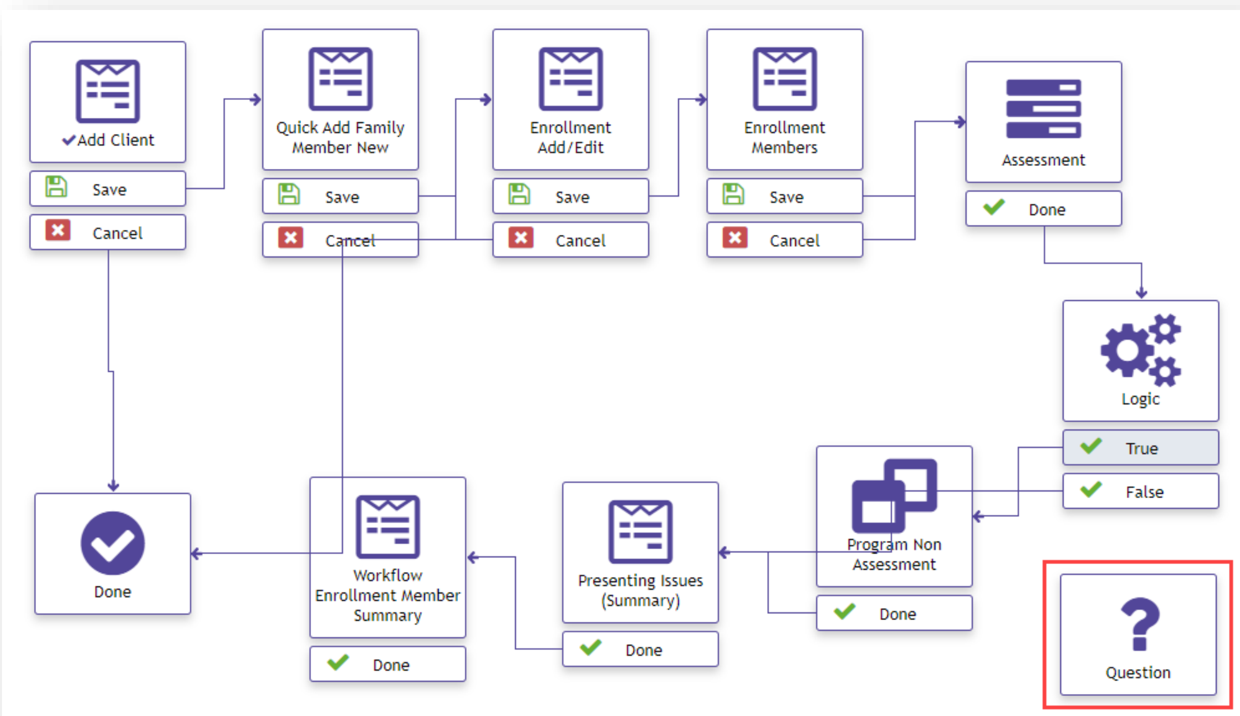
The Logic Step menu also includes **Set as Start Step**, **Rename**, and **Delete** which function as mentioned previously for other step types.

Question Step

With the Question Step, you can write a question that is presented to the User at a specific point within the workflow. The next step is then determined based on the User's answer to the question.

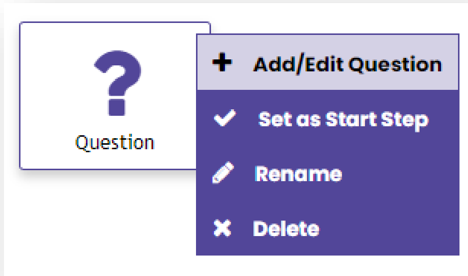
As our example here, we can add a question asking the User if the Client has a criminal record. If the answer is 'Yes', then we will direct the User to complete a non-assessment *Crimes* form for the Client. If the answer is 'No' because the Client does not have a criminal record, the non-assessment form will be skipped entirely.

Let us add our question between the new logic and Program Non Assessment Steps.



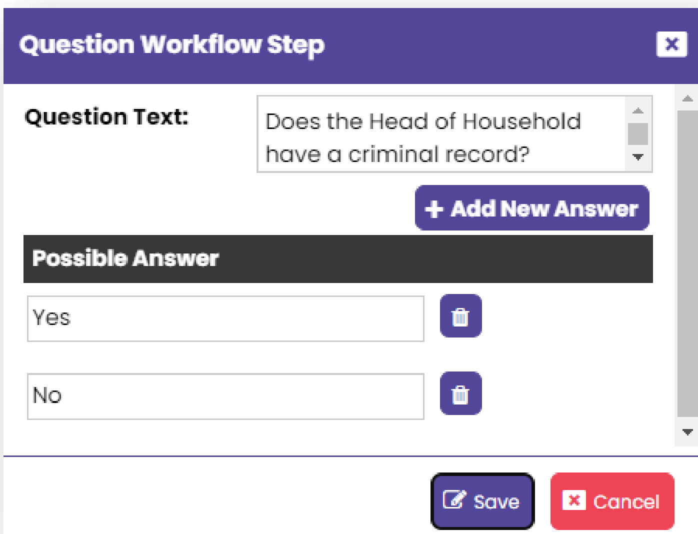
Add/Edit Question

The question to display for the User can be added here (Add/Edit Question off new Question Step menu).

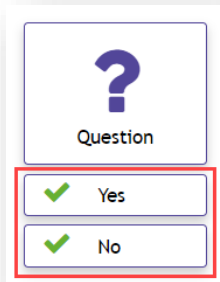


Enter the question exactly as it should display for the User.

Let us now add our two answer options. (ADD NEW ANSWER)



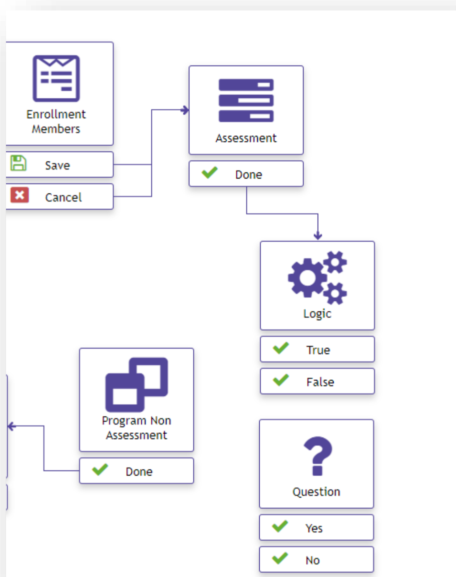
Once saved, the new command buttons display below the Question Step in the workflow. Each option is labeled with a possible answer choice, **Yes** and **No**.



Similar to the Logic Step, we need to revise the path the User should take in the workflow based on the Question Step responses.

Let us make the following modifications:

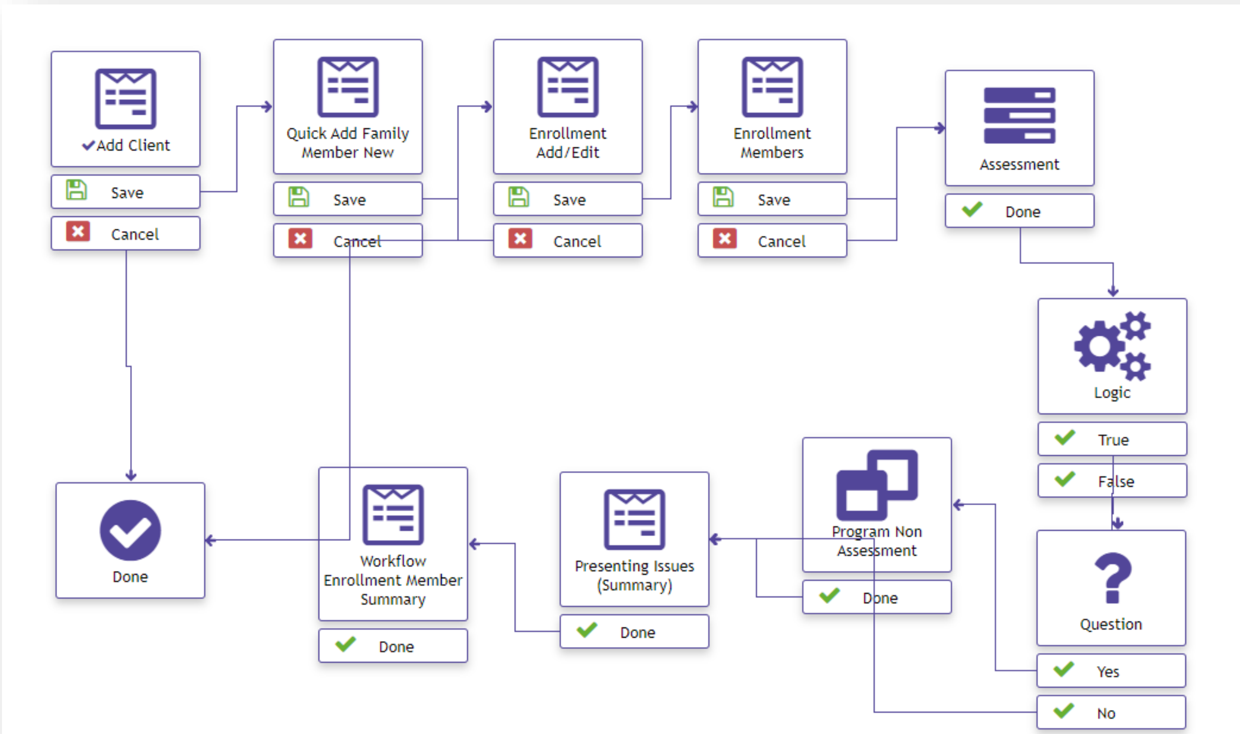
First, remove connectors for the step before the Question.



When the Logic Step is TRUE and FALSE, the next step will be the Question prompt.

If the User selects YES to the question, the next step will be Program Non-Assessment.

If the answer is NO, the next step will be Presenting Issues.



Question Step Menu

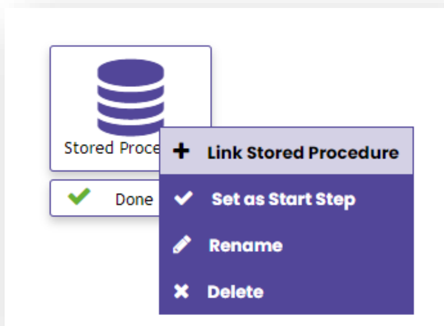
The Question Step menu also includes **Set as Start Step**, **Rename** and **Delete** which function as mentioned previously for other step types.

Stored Procedure Step

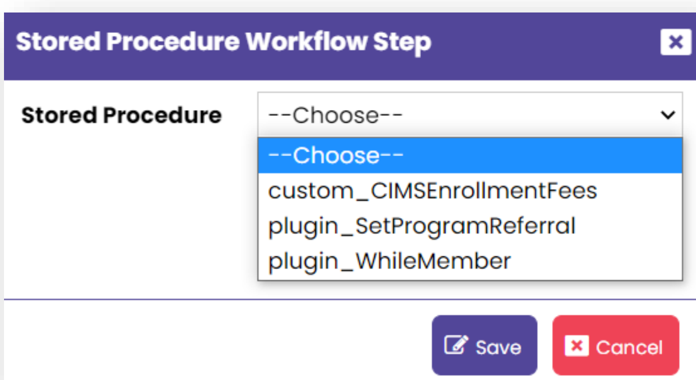
The Stored Procedure Step is an advanced option as it requires the ability of the User to develop a stored procedure. Once developed using the correct schema syntax, as seen here, enter a request through your Project or Account Manager to have the stored procedure executed.

```
Workflow.x_plugin_YourProcedure
```

Add the step to the workflow and then link the stored procedure



Select the executed **Stored Procedure** from the dropdown.



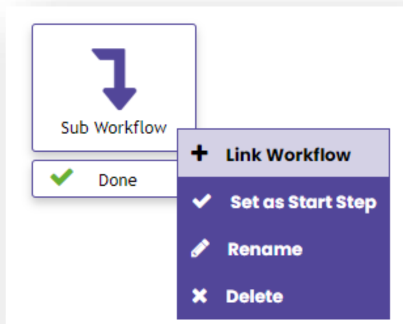
Stored Procedure Step Menu

The Stored Procedure menu also includes **Set as Start Step** and **Rename**.

Since we are not going to configure the Stored Procedure Step, let us now remove it from our workflow.

Sub Workflow Step

Another more complicated step is Sub Workflow. This allows you to add a second workflow to this main workflow.



Using Sub Workflows becomes tricky as it requires parameters to be passed in-and-out of the sub workflow, requiring extensive configuration.

For additional information about adding and configuring a sub workflow within a workflow, please contact your System Program or Account Manager at CaseWorthy.

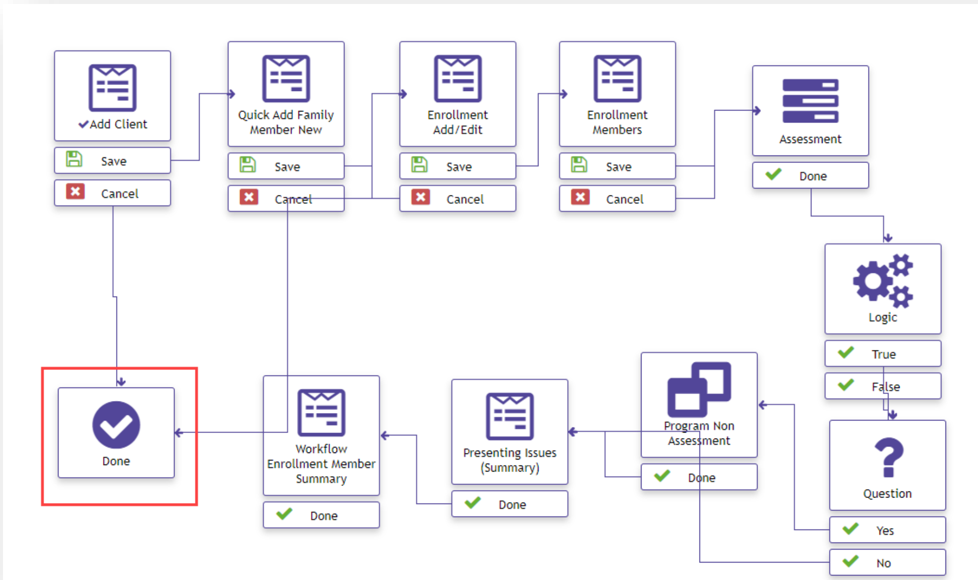
Sub Workflow Menu

The Sub Workflow menu also includes **Set as Start Step**, **Rename**, and **Delete**.

Done Step

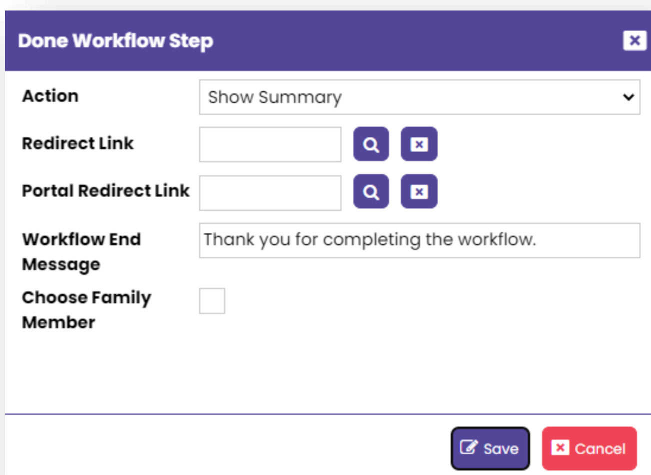
The Done Step signifies the end of the workflow. This step's configuration determines what displays at the end of the workflow as well as where the User will be redirected when the workflow is closed.

As a component of our copied baseline workflow, we already have a Done Step added to our process.



Done Step Add/Edit Properties

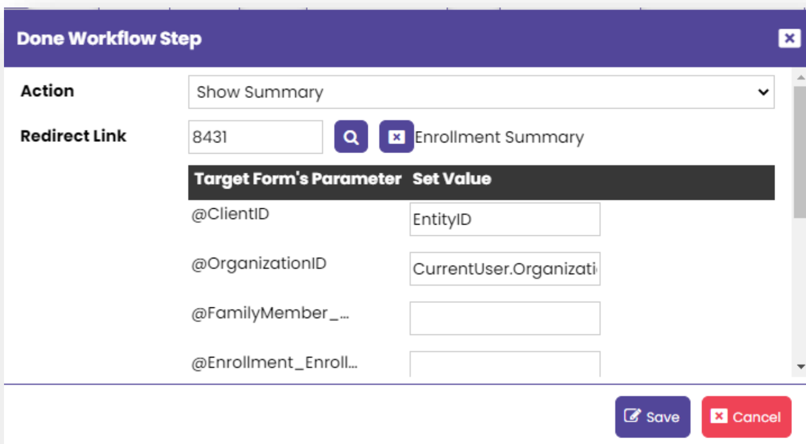
Let us take a look at its properties.



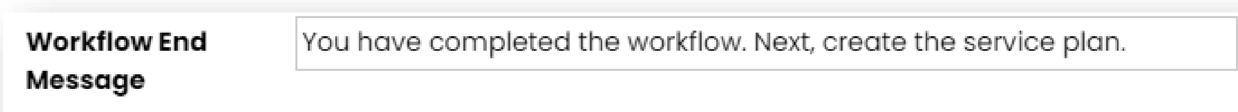
The **Action** allows you to select what happens for the User when the workflow is complete. The User can either be presented with a summary of the workflow, which is selected by default, or a URL can be specified that redirects the User to a different Web Page altogether which may be used in portals.

A **Redirect Link** is used for workflows in the application while **Portal Redirect Link** is used for portals. They are both configured the same way to redirect the User to a specific form, workflow, or dashboard when they close the window.

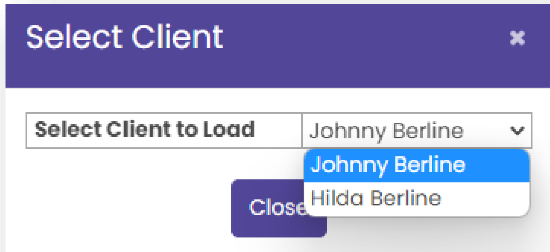
By default, the User is redirected to the *Client Dashboard* on the Case Management tab as we saw in our baseline walkthrough. For my custom intake workflow, I'm going to redirect the User to the *Program Enrollment Summary* form instead where the service plan is entered. I'll also enter the necessary parameter **Set Values**.



You can also enter a custom message that displays at the top of the page when the workflow is done.



UPDATE: **Choose Family Member** provides the ability to the User to select to which Client's record they should be navigated when the workflow is completed for multiple enrollment members. If this setting is not selected, and a Redirect link is not set, they will be directed to the Head of Household's *Client Dashboard.*



This setting only applies to workflows in the application, but not portal or kiosk.

Done Step Menu

Rename and **Delete** are available here too.

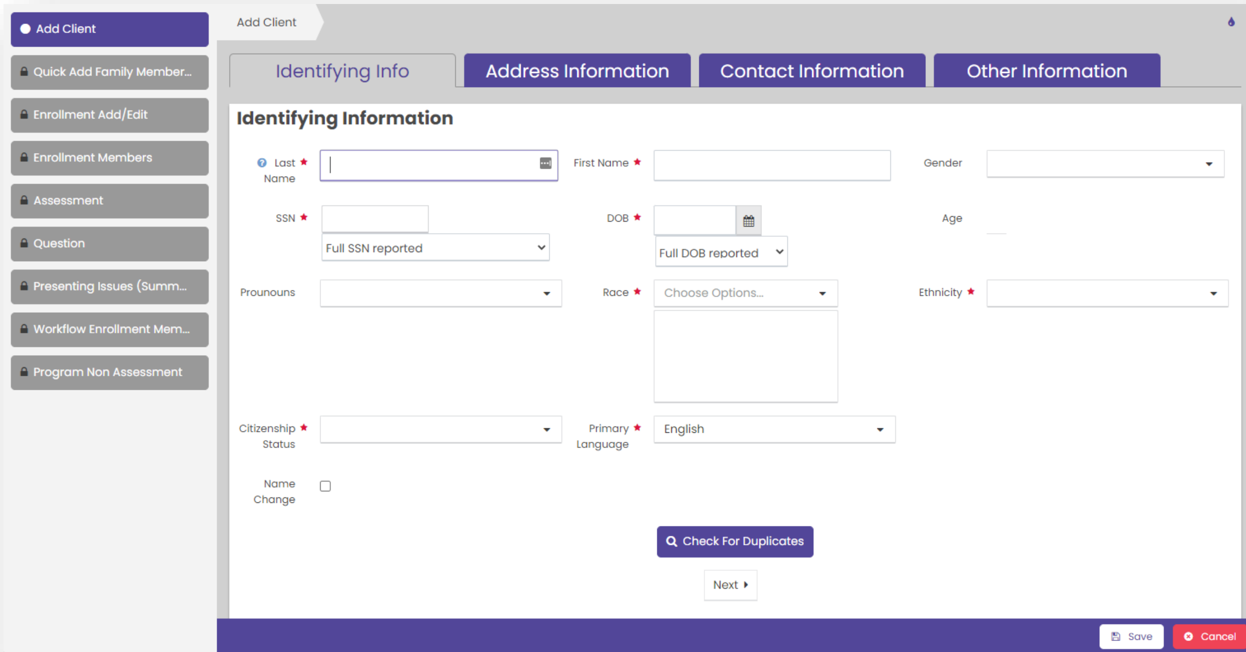
Last step before saving is to ensure the validation indicator is green. Otherwise, the User will get an error message when attempting to use the workflow.

If there are any errors found within your set dependencies, required steps, etc., an exclamation point displays. You can click the icon to display the error messages, which can then be corrected before releasing the workflow to your Users.

To complete the workflow click Save Options > Save & Close.

Custom Workflow Walkthrough

Once the custom workflow is added to a custom role, it can be tested.



I can see the workflow's steps now include the Question Step.

The Logic Step does not appear as it is designed to automatically occur.

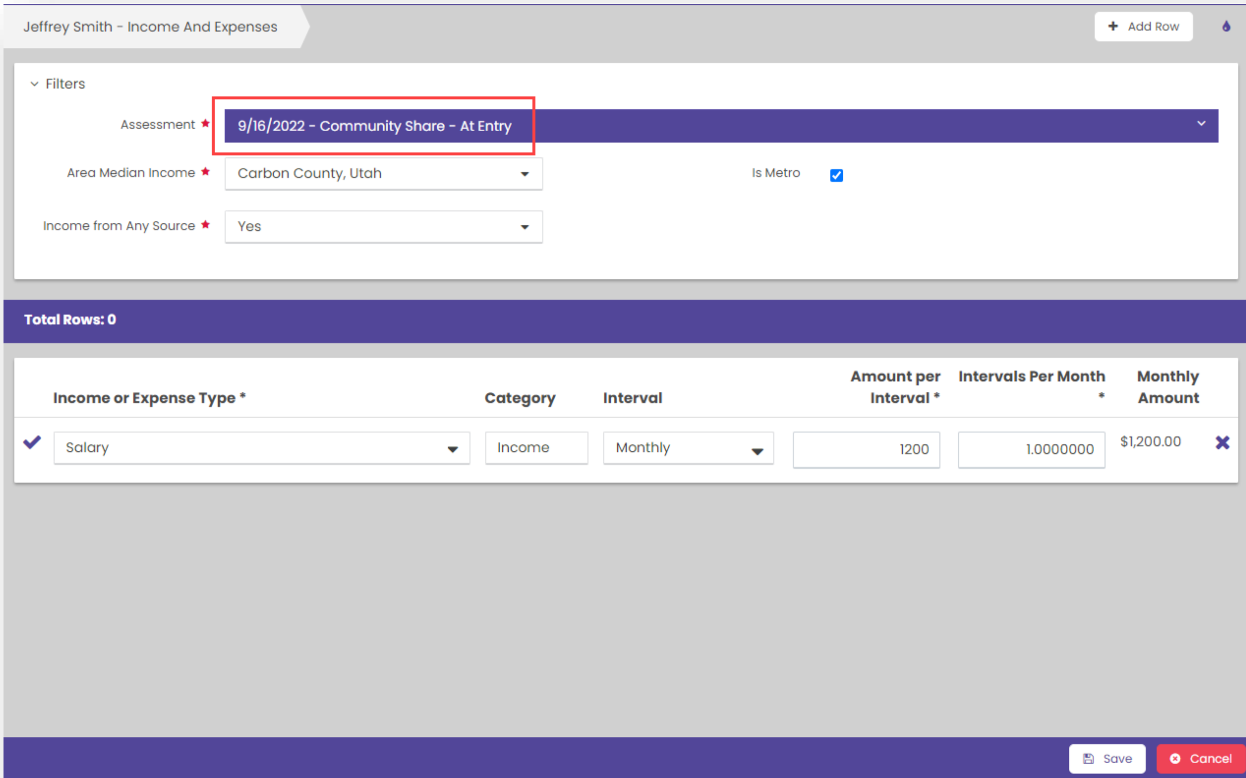
Remember, we updated the workflow to have this Form Step direct to the next step when both SAVE or CANCEL is clicked.

Next is the Enrollment Add/Edit Form Step.

Now the Enrollment Members Form Step. Again, I updated this Form Step to move to the next step using SAVE and CANCEL.

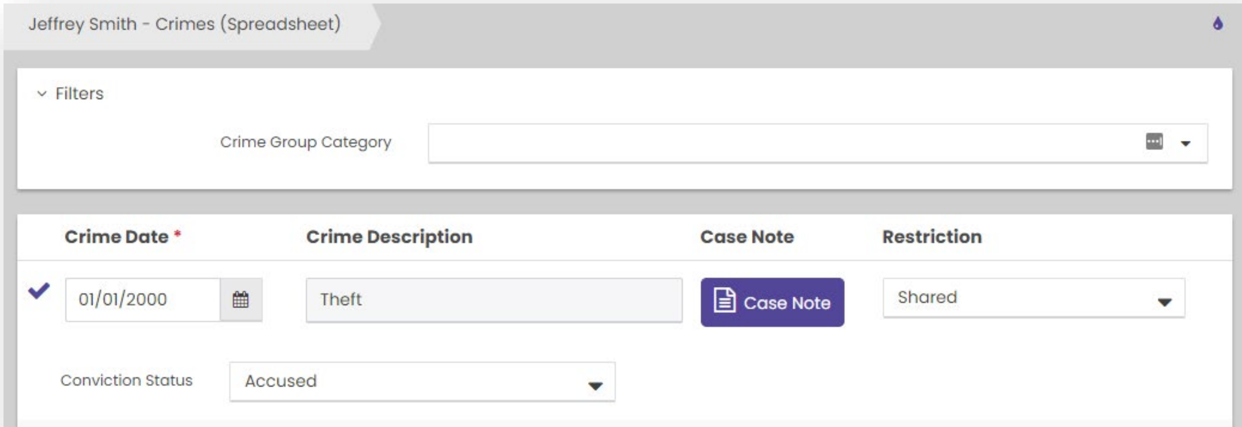
Next, the Program's assessment which includes an 'At Entry' event presents.

The benefit of completing assessments in workflows is that the workflow automatically populates the assessment manager with the date, program enrollment, and event.



Next, our Question Step presents.

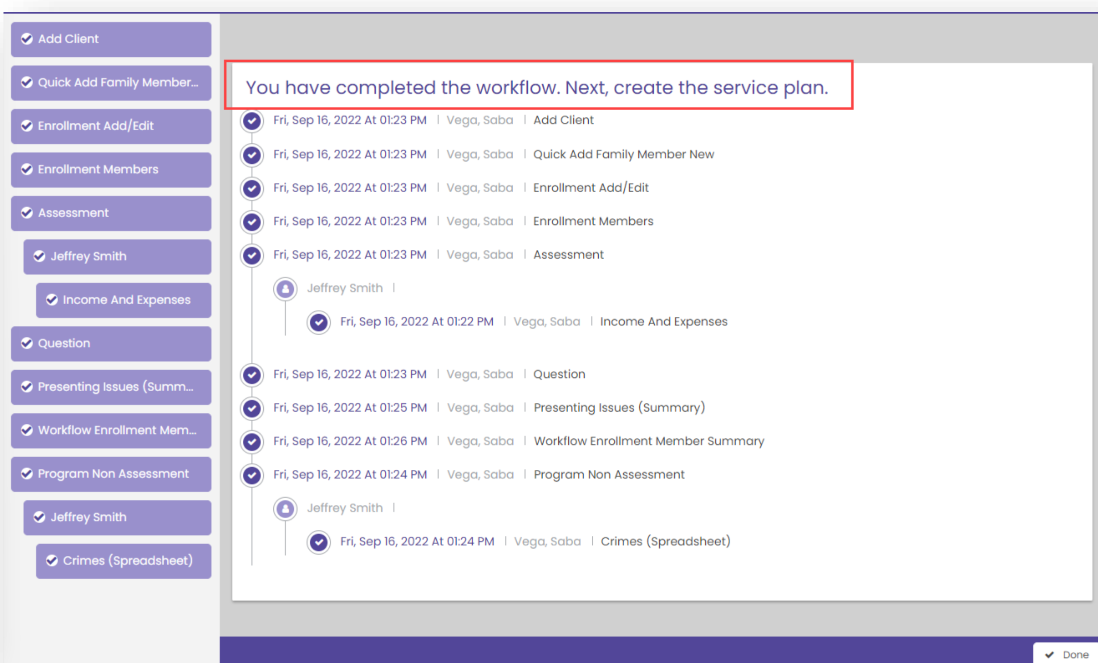
Click ‘Yes’ and we are presented the program’s non-assessment.



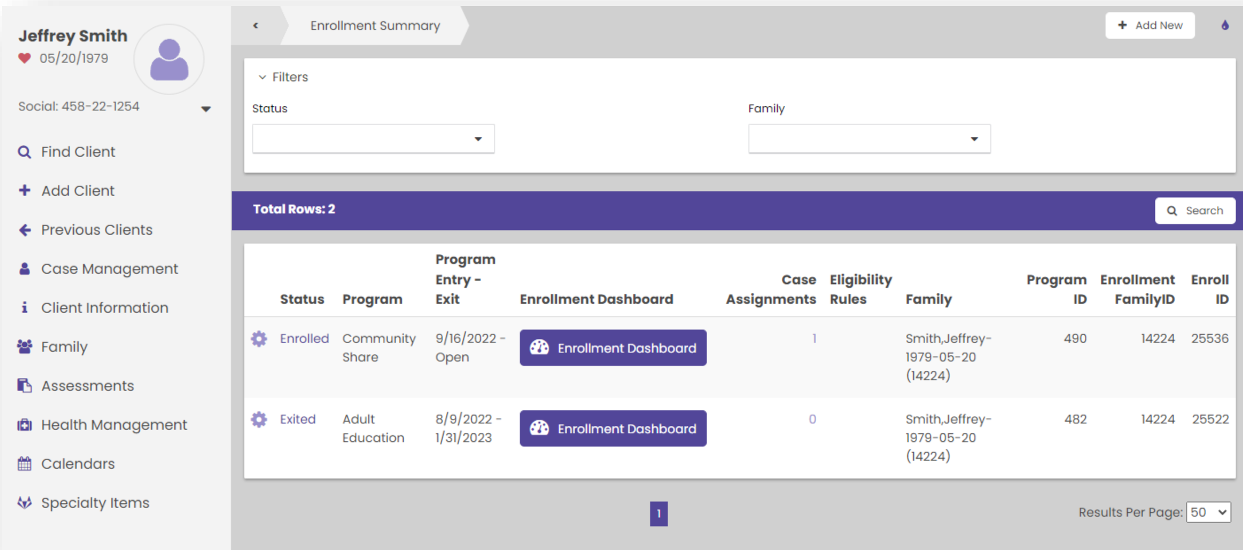
Next is the Presenting Issues Form Step for which I don’t have anything to record so I click DONE.

The *Workflow Enrollment Member Summary* form Step displays, as expected. I click DONE.

My Summary form includes the message I added to the Done Step.



I click DONE and I am directed to the Client's *Enrollment Summary* form as also configured in the Done Step where the User can easily enter the service plan.



This concludes the video on how to copy and configure a workflow. Next in the series, we will explore how to enable and customize the Free Navigation feature.

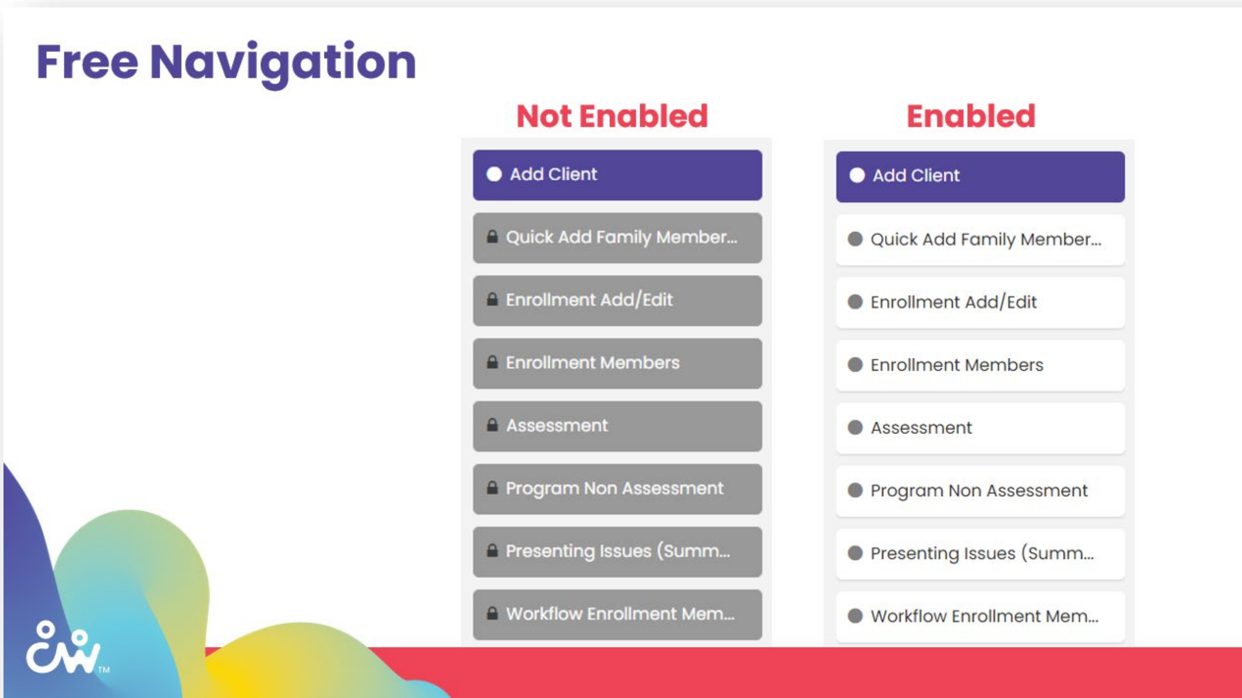
Free Navigation

This 4th and final video of the CaseWorthy *Workflow apBuilder* video series explores how to enable and configure Free Navigation.

What is Free Navigation?

As we explored previously, a workflow is comprised of multiple steps where the User is led from one step to the next without the ability to move around spontaneously.

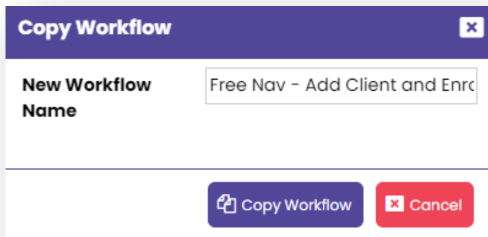
By adding the Free Navigation component, the User can skip over steps and return to previous ones.



For example, if the User is on the Assessment Step of the workflow and wants to navigate back to review the Add Client Form Step, without Free Navigation, the steps are locked, and the User could not access the earlier form. If Free Navigation is enabled, the User could move back freely.

I'm going to make a copy of the custom workflow I created in the last video.

BEST PRACTICE: It is a suggested best practice to retain versions of complicated items you configure so as to have a reference point for where you began.

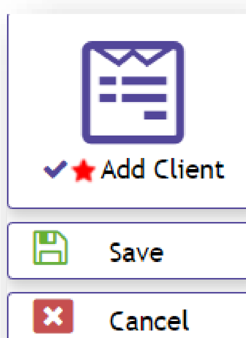


Free Navigation Configuration

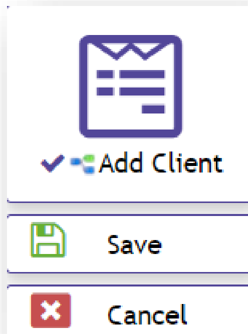
It is more complex than simply flipping a switch because as we reviewed in the previous videos of this series, steps are designed to depend on other steps by passing over parameter set values.

Once the Free Navigation feature is enabled, there are two primary items that will need to be reviewed.

First, you may need to set certain steps as required. This indicates a step must be completed before the User can move on to another step. If a step is required, a red star will display next to the step title in the Workflow apBuilder



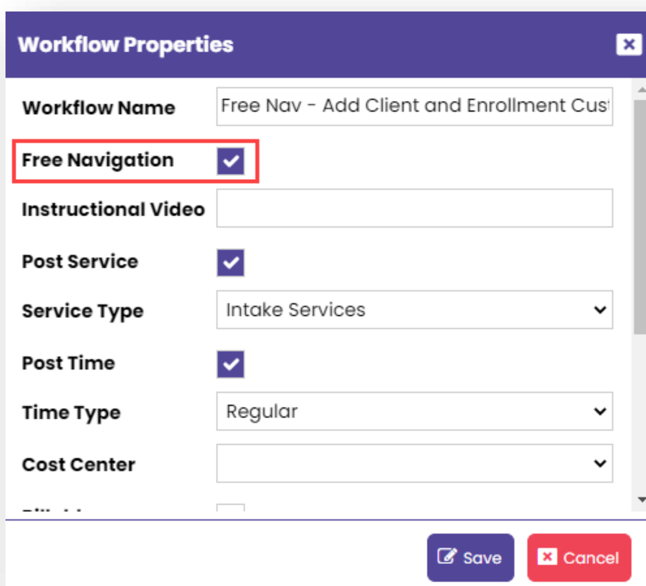
Second, dependencies may need to be configured, which signifies a step cannot be completed until a previous step is completed first. If a step has a dependency attached, a green chart displays next to the step title.



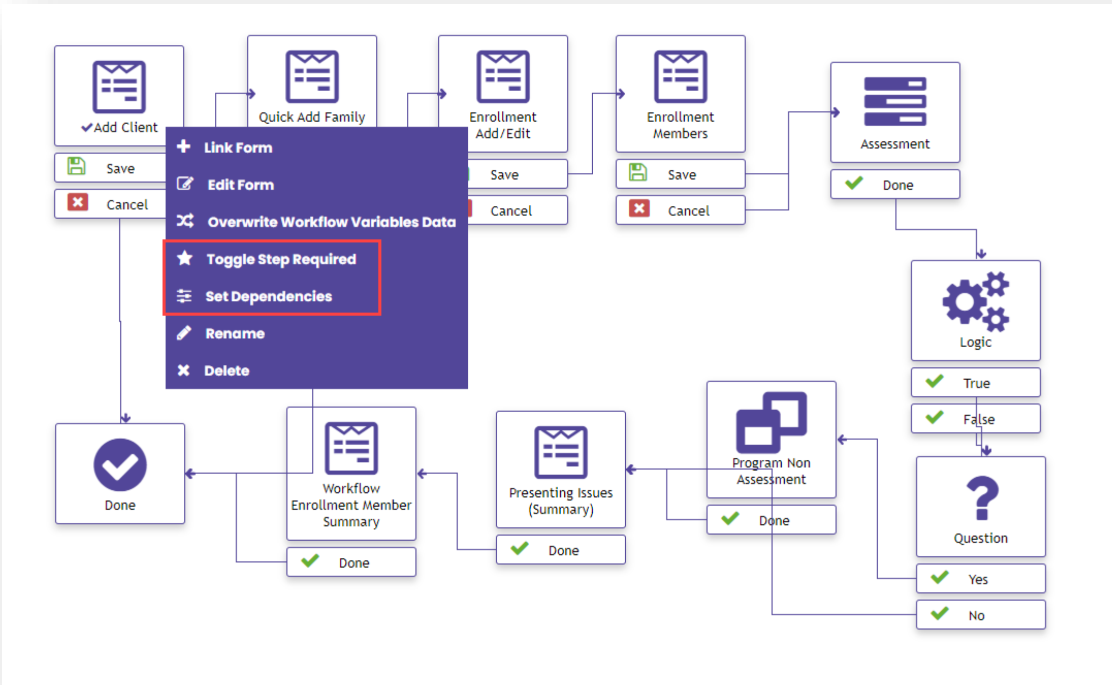
Workflow Properties

Let us start with turning on the Free Navigation feature for our custom workflow.

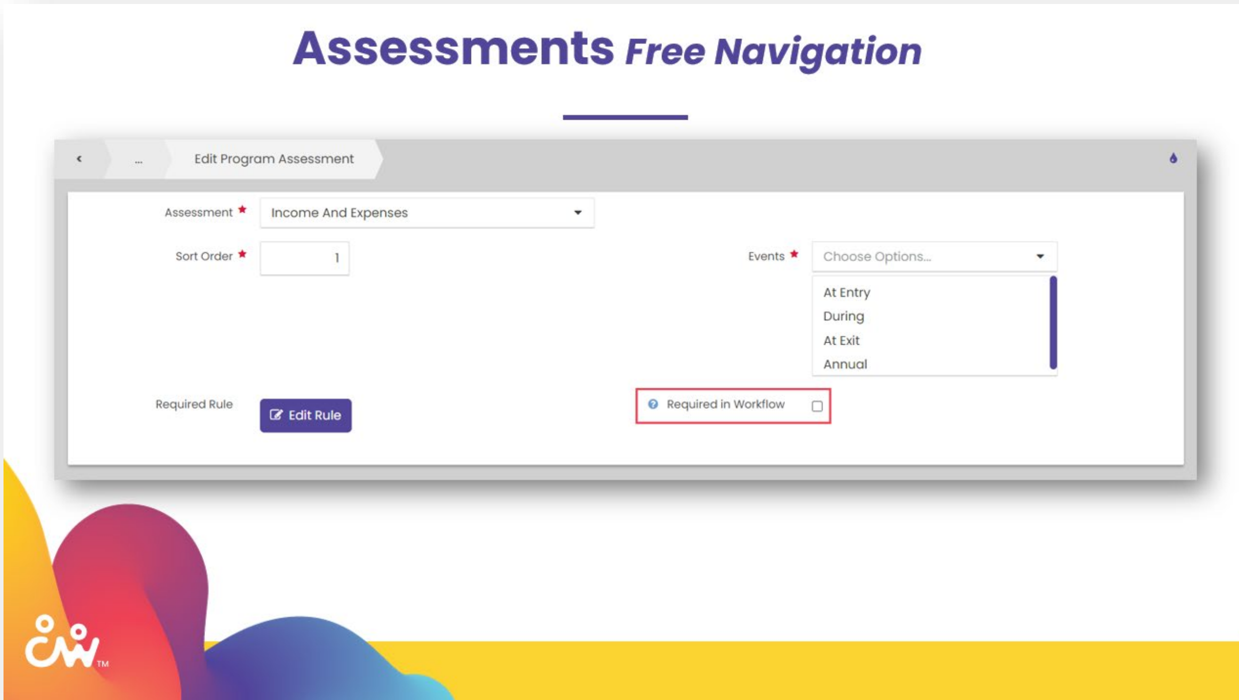
Within Workflow Properties, simply select **Free Navigation**, and then save the changes.



With the feature now enabled, each of the Form and Question Steps on the workflow will include two additional options: **Toggle Step Required** and **Set Dependencies**.



The Assessment and Non Assessment Steps do not include these new options because they are actually marked as required when they are linked to programs. If the assessment was marked as required, it will then become a required assessment within the workflow ONLY when the Free Navigation feature is turned on.



If that setting is on, the User will not be able to skip the assessment when completing a workflow. If all required assessments have not been completed by the last step of the workflow, the User is directed back to the assessment step and receives a message that says, “Please complete all required steps.”

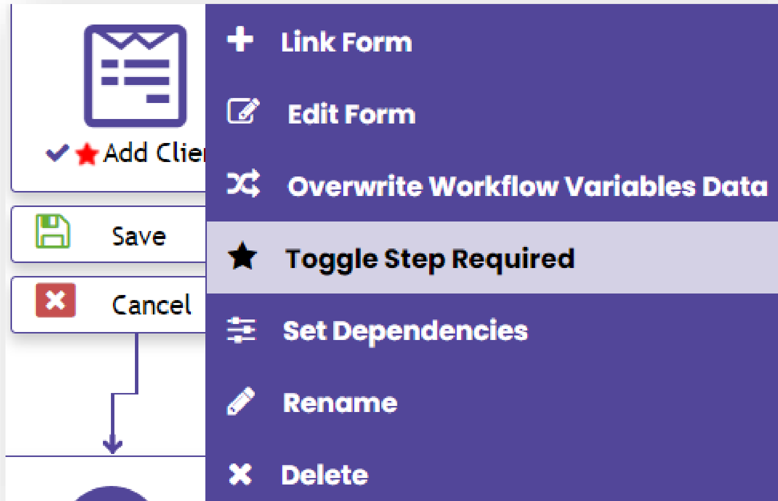
Required Steps

Now you must reevaluate your workflow’s purpose, expected flow, its existing steps, and how free navigation may impact the process.

The intention of the workflow we are reviewing is to add a new Client, or select an existing Client, and then to enroll selected members into a program.

Let us review the Add Client Step. Here, we are adding or selecting an existing Client. Without a Client, there is no member to enroll. Therefore, this step should be required.

Notice the red star that now displays indicating this is a required step.

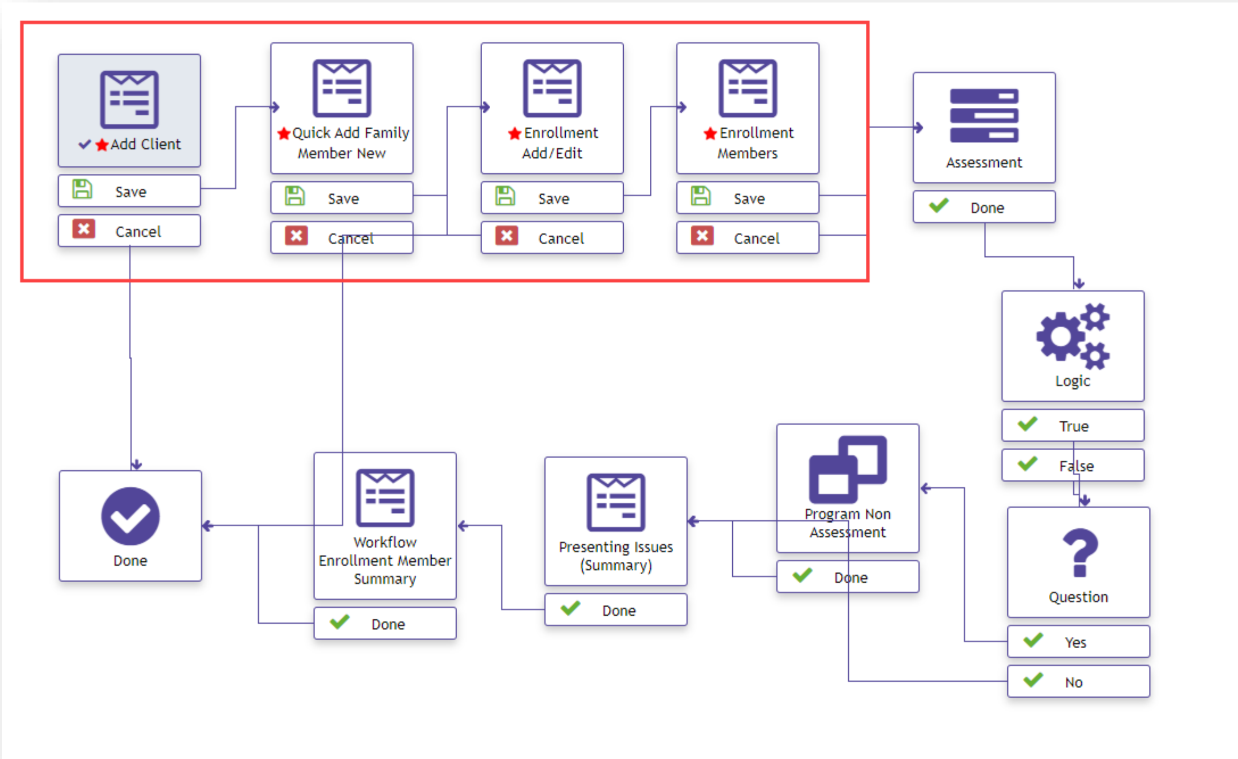


What about the Quick Add Family Member New Step? Here, we are prompting the User to add family members. An efficiency granted by intake workflows is the ability to enroll all members at the same time. If that is a step that is important in your process and should never be skipped, it should also be marked as required. We will indicate this is a required step as well.

The next step allows the User to select the program for enrollment. We will indicate this is also a required step since the purpose of the workflow is to record an enrollment.

Next is Enrollment Members. This step allows the User to select the members to be enrolled from the family group. Since the first three steps are required, wherein we add members and select a program for which to enroll them, this step would also need to be a required step because this is how the User indicates which members are going to be enrolled.

Now that each of our first four steps are marked as required, notice the red star that displays for each. This is your visual indicator of which items are required within the workflow.

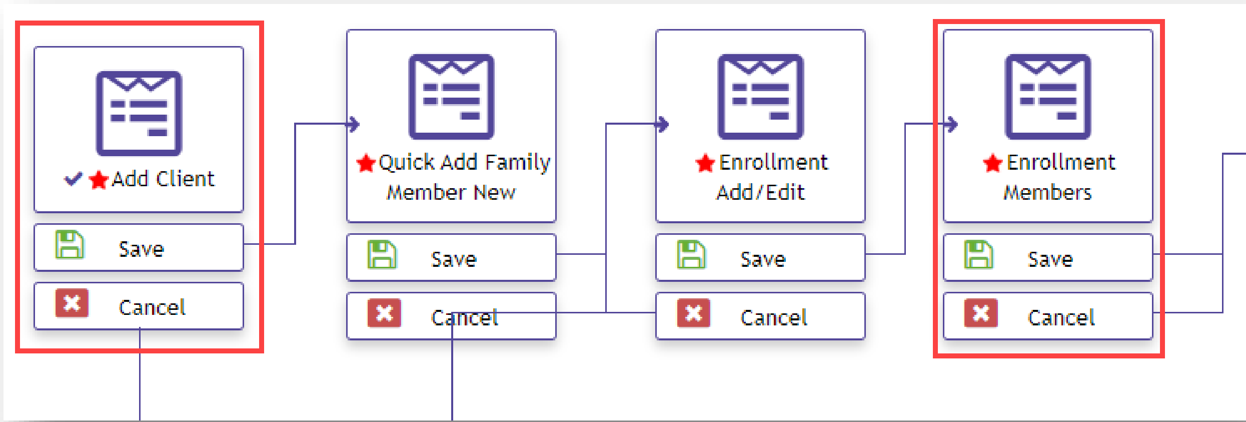


If at any point you would like to remove the requirement from a step, simply select **Toggle Step Required** off the menu again. The red star is removed.

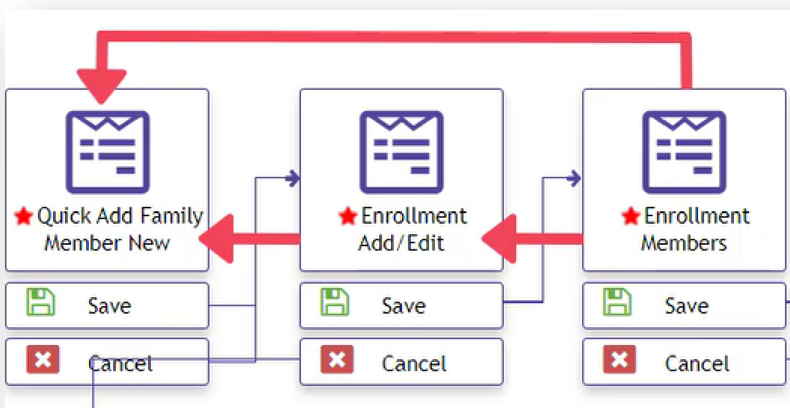
Dependencies

Let us now move on to the dependencies.

Some forms within your workflow may be dependent upon other forms being completed first. For example, in our workflow here, we should not be able to enroll members if we have not yet created or identified a Client.

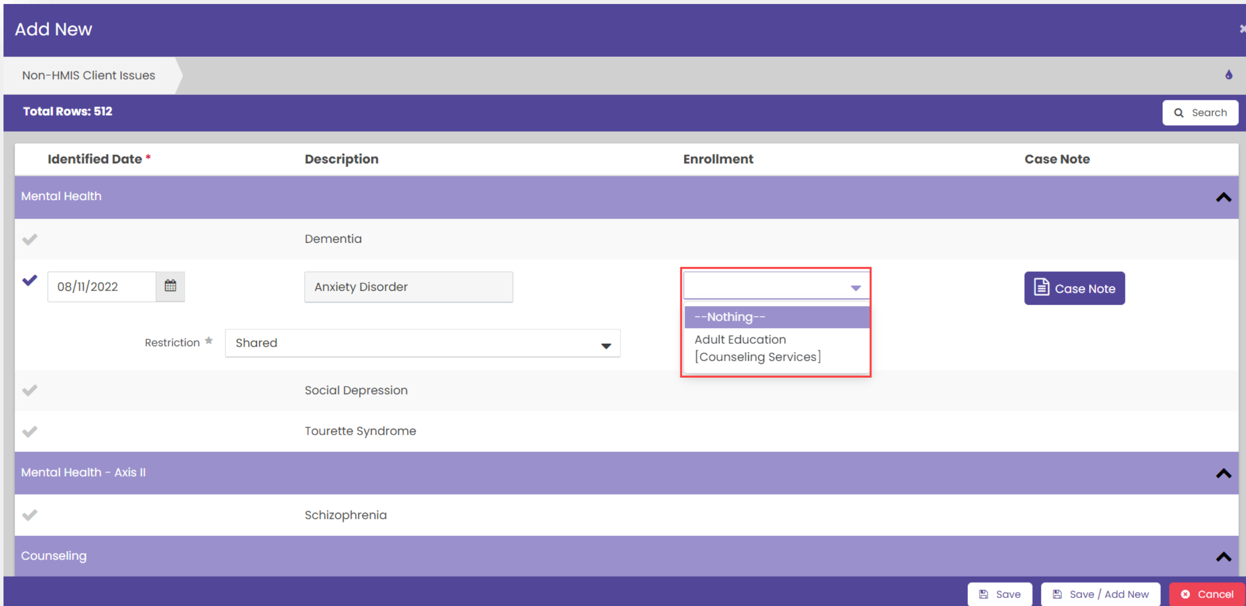


Dependencies cascade within the workflow, which means, if step four depends on step three, and step three depends on step two, then step four also depends on step two.



Configuring the dependencies requires a thorough understanding of your custom workflow before applying any changes.

For example, when adding an issue on the Presenting Issues Step, you also have the ability to link that concern to a program enrollment.



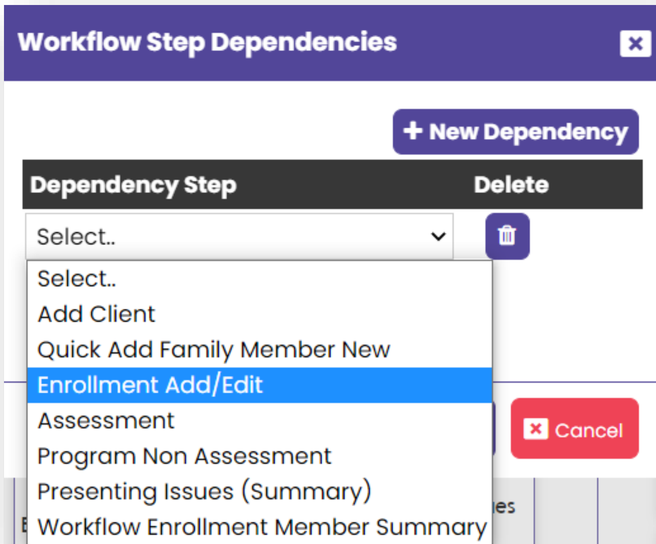
If the workflow is set up with Free Navigation and the Presenting Issues Step is NOT dependent upon the Enrollment Add/Edit Step, then the User could skip ahead to enter an issue before selecting the enrollment, thereby not linking the issue to the enrollment.

Once you understand the workflow and where dependencies should exist, it is a simple process to add them.

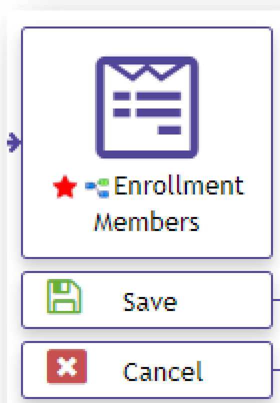
In our workflow, we only want members to be selected once a program enrollment has been specified, so let us add a dependency where the Enrollment Members Step depends on the Enrollment Add/Edit Step.

From the Enrollment Members Step menu, select **Set Dependencies**.

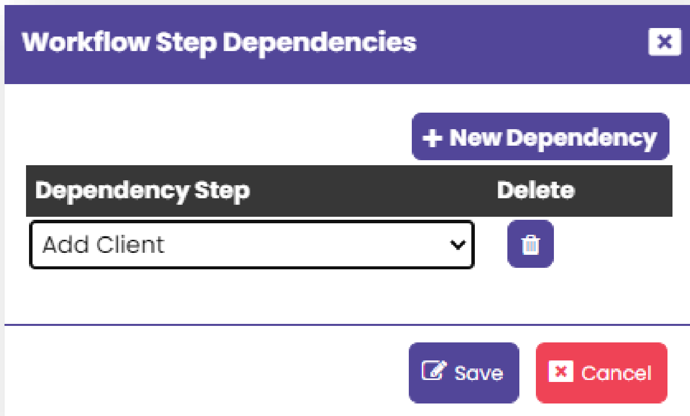
Here, we can add a new dependency and choose the step Enrollment Members should depend upon. The dropdown automatically includes all steps that exist within the workflow.



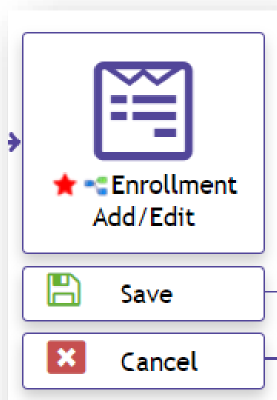
Once saved, the Enrollment Members Step displays a flow chart to indicate there is an existing dependency



In our workflow, we only want to select a program enrollment once a Client has been added or selected. Therefore, the Enrollment Add/Edit Step should depend on the Add Client Step.



The Enrollment Add/Edit Step displays a flow chart icon to indicate there is an existing dependency.



Form Step's Parameter Set Values

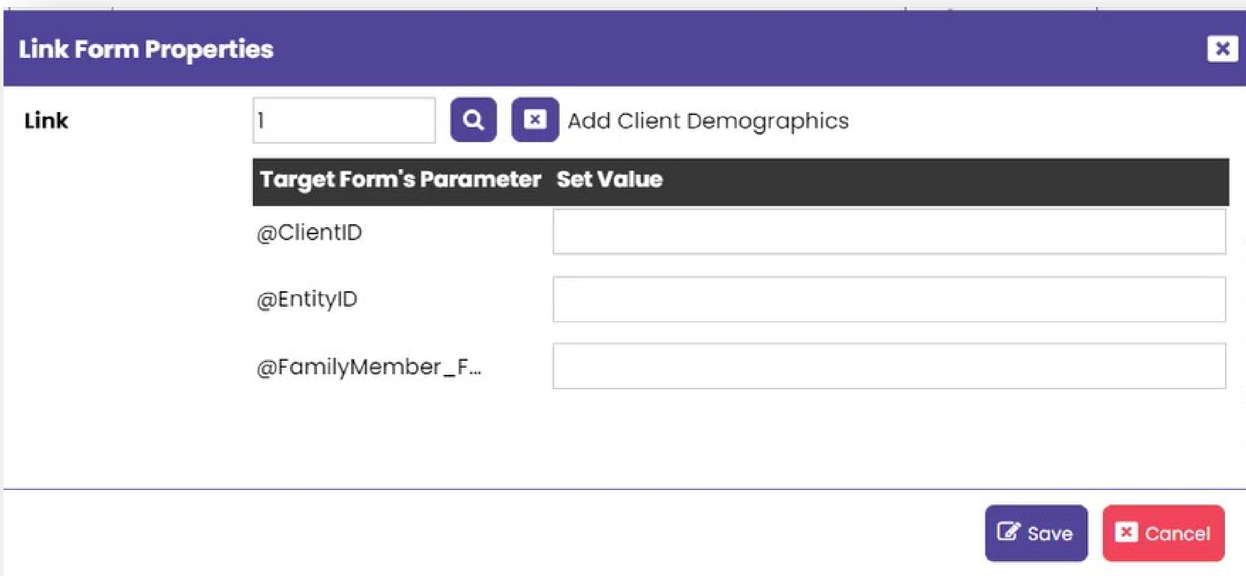
Now that we have set our dependencies, we need to go a step further.

Since the User will now have the ability to move backwards in the workflow, we need to set form's parameter values in a way that will display data if the User navigates backwards to the form, as opposed to appearing blank.

Let us look at the Add Client Step. Here, the User initially adds or selects a Client. If at any later point in the workflow process, the User navigates back to this step, the form should display the previously populated Client's information.

We need to set the parameter values for this to occur within the Link Form Properties. (Add Client Form Step menu > Link Form)

Remember, the primary parameters from the form are presented. Here we have the **ClientID**, **EntityID**, and **FamilyMember_FamilyID** parameters.



We didn't set values for this form previously because we want the form to be blank for the User so they can create or select a Client record.

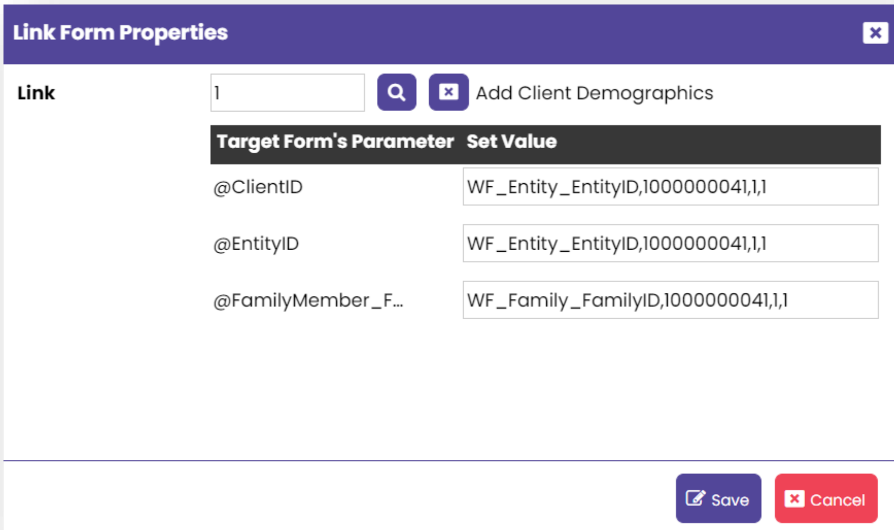
But in order for this form to retain data that the User can review while using a free navigation workflow, we need to now set the values.

Previously we covered referencing other values from other forms. Here we need to actually reference this form's own values so that the User can return to this form and review what was previously entered.

For Client ID, select the 'Add Client' form, then that form's EntityID. (Add Client > WF_Entity_EntityID)

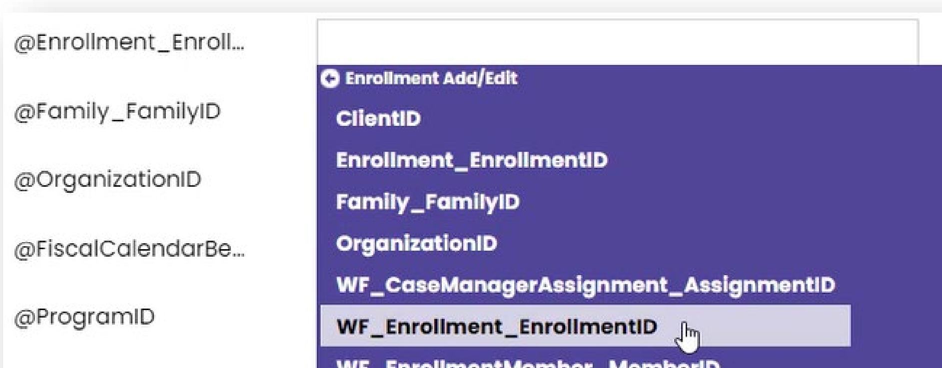
For EntityID, we do the same. (Add Client > WF_Entity_EntityID)

For FamilyMember_FamilyID, select the 'Add Client' form. Then FamilyID. (Add Client > WF_Family_FamilyID)

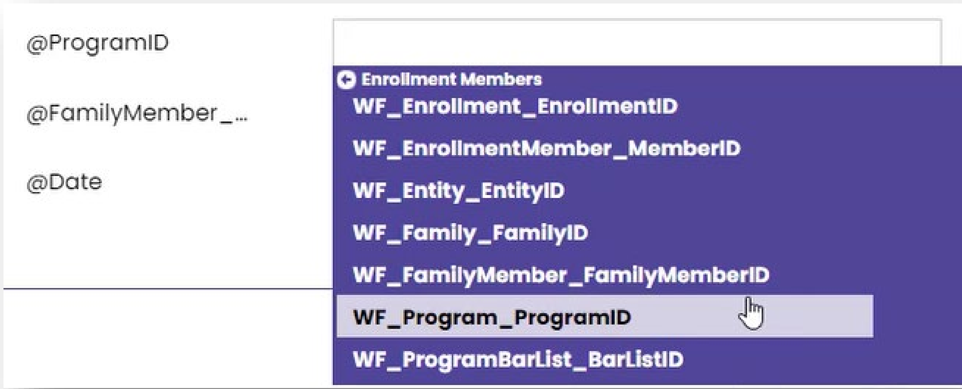


Let us set the parameters values for the Enrollment Add/Edit Step as well.

In order for the User to see the enrollment information if they navigate back to this form, we need to select the form's own EnrollmentID. (Enrollment Add/Edit > WF_Enrollment_EnrollmentID)

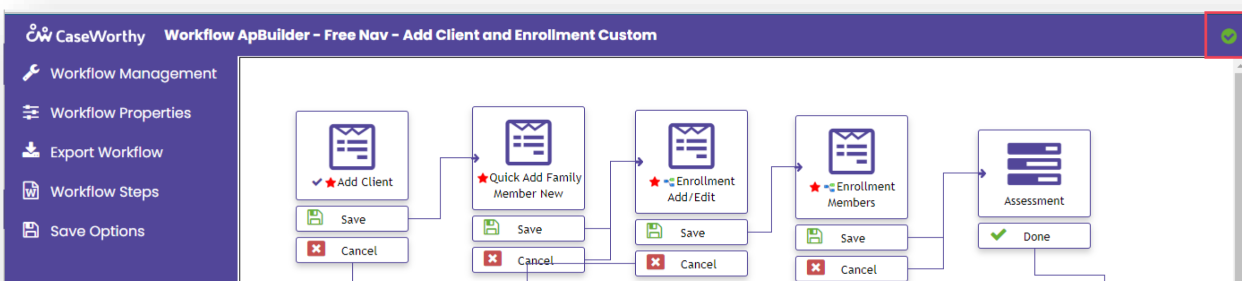


The ProgramID must also be set. (Enrollment Add/Edit > WF_Program_ProgramID)



As previously reviewed, an indicator icon displays in the top right corner of the workflow

Once the workflow is complete, the goal is to display a green checkmark here to confirm the workflow is configured correctly and will perform as expected for the User.

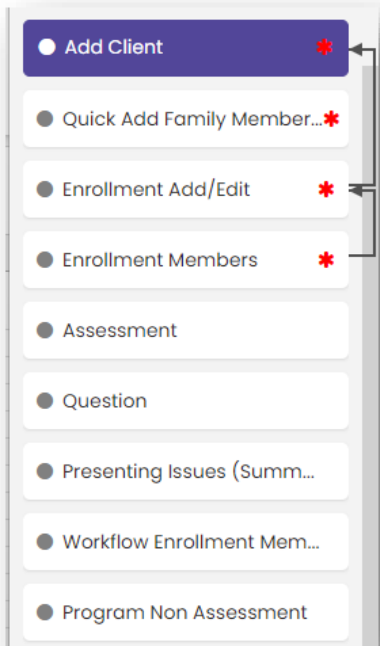


Free Navigation Workflow Walkthrough

Again, in order to test your custom workflow, you need to add the workflow to a custom role.

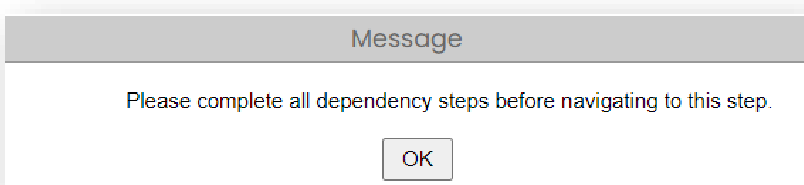
When our workflow first opens, we immediately see some key differences in the steps on the left.

There are red stars indicating the first few steps are required.



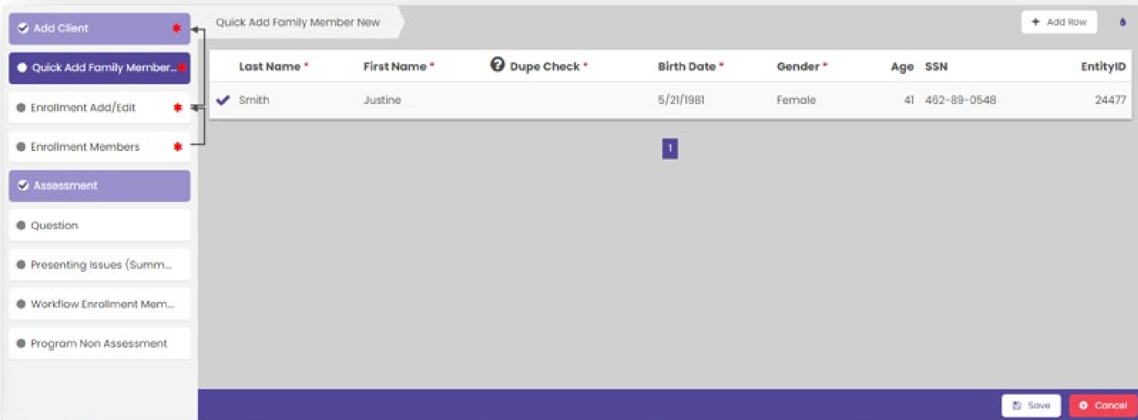
There are also black arrows that represent our dependencies.

And, if we attempt to move to a step where a dependency exists, a warning message displays indicating a dependency exists and the form must be completed before moving on to the selected step.



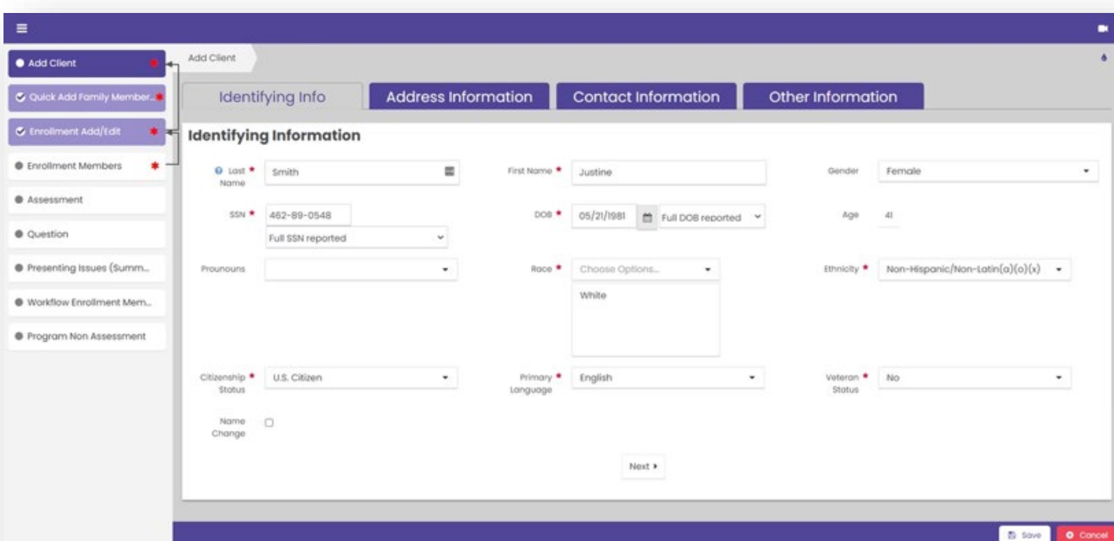
Additionally, notice how the steps are no longer locked and we can move throughout the workflow freely.

Lastly, we can confirm our parameter values are set correctly. Let us search for a Client here. Once saved, we automatically move to the second step in the process.



We're going to select and save the enrollment.

But now, through our set parameters, we can navigate back to the Add Client Step at any time, and the same Client's information will appear! As well as to the Enrollment Add/Edit Step.



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This concludes the *Workflow apBuilder* video series.