# **Template - Request for Information**

The template named “Template - Request for Information” is applicable to CampusNexus Student.

## Purpose and Outcome

This sequence is intended to be used by prospective students who are interested in attending your institution. This is an anonymous sequence that does not require the user to be authenticated.  When the user successfully completes the sequence, a new prospect inquiry record and a systudent record are created in the CampusNexus Student database.

The campus configuration determines whether duplicate checks are executed. Depending on the campus configuration, if a systudent record exists and a person with the same first and last name completes the RFI form, the status of the original systudent record may be updated to a new status (.e.g., New Lead > Active).

## Prerequisites

The template was built with Forms Builder using the applications listed below. The template is forward compatible with later versions of the listed applications.

|  |  |
| --- | --- |
| **Application** | **Minimum Version** |
| Forms Builder Designer and Renderer | 3.2 |
| Web Client for CampusNexus Student | 18.0 |
| Workflow Composer | 2.4 |
| Packages installed from Package Manager in Workflow Composer | Activities and Contracts (V1) 18.0.0  Activities and Contracts (V2) 18.0.0  Forms Builder Contracts 3.2 |
| Workflow Tracking Database | N/A |
| Staff STS 2.0 | 2.0 |

You should also have a login for <http://www.mycampusinsight.com> to access  Help.

## Step 1: Download and Import the Template

1. Download the template file to your environment (local drive or network location).
2. Log into **Forms Builder – Form Designer**.
3. Click the **Export/Import** tile.
4. Select the **Import** tab.
5. Click **Select exported file** and navigate to the downloaded template file.
6. Click **Import**.

* [Export/Import](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/ExportImport.htm)

### Step 2: In Form Designer…

1. From the Forms slide out, select **Request for Information**.
2. Optional - Customize the form for your environment. Modify properties on current fields to make them required, etc., or add/remove fields on form.

* [Fields](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/Fields.htm) and [Components](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/Components.htm)

### Step 3: In Sequence Designer…

1. Select the **Template - Request for Information** sequence.
2. Click **Save As** to create a copy of the sequence/workflow and customize the copy for your use. This way you can always refer back to the original sequence/workflow you downloaded.
3. Optional - Add a custom style (theme) associated with your campus.

* [Themes](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/Themes.htm)

1. Open the associated sequence workflow.

Depending on your environment, to open Workflow Composer either click **Open Workflow** in Sequence Designer or launch of a local installation of Workflow Composer.

* [Opening Workflows for Sequences](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/HostedEnv.htm)

### Step 4: In Workflow Composer…

1. Select the **Arguments** tab and note that the *prospectInquiryEntity* argument has been created due to entity fields on form.

* [Updating a Form After Creation of a Sequence](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/AddingEntities.htm) and [Components](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/Components.htm)

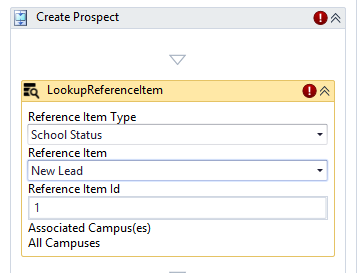
1. Double-click the **Start Your Journey** transition.

Note: This is a state machine workflow. Each form is a state, and the arrows are transitions from one state to another.

* [State Machine Workflows](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/StateMachineWorkflows.htm)

1. Modify the hard coded assignment values for your CampusNexus Student environment. To get the values, you may either query the database directly or use the LookupReferenceItem activity within the workflow.

Simply drag/drop the **LookupReferenceItem** activity into the workflow. Select the **Type** you are looking for (e.g., School Status) and then select the Item you are looking for within that Type (e.g., New Lead). The activity will return the hard coded Id value (e.g., 1).



* [LookupReferenceItem activity](http://www.mycampusinsight.com/support/CampusNexus%20Workflow%20Help/Content/Workflow/LookupReferenceItem.htm?Highlight=lookupreferenceitem)

1. Modify the right side (value) for all assignment statements. These are fields that a student would not typically fill in and would be supplied by the system at time of creation. These fields are required to create a new prospect.

prospectInquiryEntity.Student.SchoolStatusId

prospectInquiryEntity.LeadTypeId

prospectInquiryEntity.LeadSourceId

prospectInquiryEntity.AssignedAdmissionsRepId

prospectInquiryEntity.Student.CountryId

* [[CreateProspectInquiry activity](http://www.mycampusinsight.com/support/CampusNexus%20Workflow%20Help/Content/Workflow/CreateProspectInquiry.htm?Highlight=prospectInquiryEntity)](http://www.mycampusinsight.com/support/CampusNexus%20Workflow%20Help/Content/Workflow/LookupReferenceItem.htm?Highlight=lookupreferenceitem)
* [Cmc.Core.Workflow.Activities.EntityModel](http://www.mycampusinsight.com/support/CampusNexus%20Workflow%20Help/Content/Workflow/Toolbox_CMC_CoreEntities.htm) (CRUD activities for entities)

1. Remove the LookupUpReferenceItem activity by highlighting it, right-clicking, and then select **Delete**.
2. Click the **Publish** button in the ribbon. Select the check box **Enable This Workflow Version?** and click **Publish.**

* [Saving and Publishing a Workflow](http://www.mycampusinsight.com/support/CampusNexus%20Workflow%20Help/Content/Workflow/PublishWorkflow.htm)

### Step 5: In Forms Renderer…

Select your sequence and try it out! You should have a new prospect created upon completion.

* [Sequence List](http://www.mycampusinsight.com/support/Forms%20Builder%20Help/Content/WorkspaceSequenceList.htm)

### Step 6: Lastly…

Once your updated sequence has been tested successfully, it is recommended that you disable the workflow for the original Template version.

1. In Workflow Composer, in the Server section of the ribbon, click **Open**.
2. Find the workflow named **Template - Request for Information**.
3. Clear the **Enabled** check box and click **Save**.