**Shared workflow**

You can create workflow (active links, filters, and escalations) that can be attached to one or multiple forms. For example, you could create an employee information active link that would populate generic identification and address fields anytime a user enters a name, and use this on multiple forms. Shared workflow lets you efficiently build, maintain, and troubleshoot versions of forms and applications. Fewer workflow objects need to be stored on the server because any changes you make only need to be made once for all forms that uses the objects.

**WARNING:** Sharing active links and active link guides among forms in different deployable applications requires caution. Role permissions are resolved based on which application has ownership. The owner application contains the form that is the primary or reference form in the active link or active link guide. The non-owner application might have identical roles mapped to different groups, but these mappings are

Ignored. If only implicit groups have permission (no role permissions), there are no conflicts. For more information, see the *Form and Application* *Objects* guide. The way you define shared active links, filters, or escalations is similar to the way you define workflow for an individual form. The main difference is that instead of attaching the workflow to one form, you attach it to multiple forms. If you do not want the workflow to be shared, select only one form. See “Defining workflow basics” on page 26 for instructions on creating workflow. Workflow actions interact with fields based on field ID (not the field name) on each of the forms to which the field ID is attached. Because shared workflow uses any valid field ID, plan how you want to use shared workflow before attaching it to multiple forms. Multiple forms that share workflow can show different field names for fields with the same ID. To make it easier to administer shared workflow, create fields with the same ID *and* the same field name on each form to help you remember the purpose of the field. Otherwise, the workflow might not fire, or the shared workflow

Actions will still be triggered but might not use the expected field. In either case, the action you expect to happen—because you have connected the workflow to a non-existing field or the wrong field—will have no effect (depending upon the workflow). Finally, if fields have matching IDs but are different data types, AR System will convert them appropriately. After you have created a form with which you want to share workflow, you can:

\_ Create a new workflow object and then attach it to forms.

\_ Select an existing workflow object and then attach it to forms.

**WARNING:** When you create a copy of a field to put on another form, the new field retains all of the properties of the original field including the field ID. Use caution when using different field names that share the same field ID since shared workflow uses the field ID to trigger actions. When exporting definitions, you can choose whether to maintain an association between the selected workflow and all related forms. See the *Form* *and Application Objects* guide for more information. When you delete a form that uses non-shared workflow, the workflow is deleted along with the form. However, if workflow is shared by multiple forms, it will not be deleted until the last form that uses it is deleted.

**Sample uses of shared workflow**

Possible ways to use shared workflow include:

\_ Populating common fields used to store employee data.

\_ Automatically assigning cases (based on tasks and applications).

\_ Accessing common forms such as bulletin boards, reporting, preferences,

reminders, and so on.

\_ Navigating, for example, in a configuration tool.

\_ Displaying a message or warning dialog box that appears whenever a user

submits a form or enters invalid information.