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| Managing Form Routing Workflows | | | |
| **NBIS Release Version:** 4.0 | **Updated Date:** 02/25/2022 | | **File ID:** JA-022 |
| **Application Section:** Organization Management | | **User Roles:** Workflow Manager | |
| **Applies to Organizations:** SSC, FSO | | | |
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**Purpose**: The **Workflow Manager** is responsible for managing the Agency Workflows in the **Form Routing** tab. A form routing **Workﬂow** determines which organizations will perform the review and authorization phases of the agency process for the Initiating Org.

Two tables will be displayed: one displaying all workflows for your organization, and another showing all workflows that you are a part of (including Organization Relationships).

Review and Authorization organizations do not configure this routing unless they are initiating cases as well. This only needs to be configured for SSC and FSO organizations.

# Workflow Overview

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** Tab.
3. From the Configuration menu drop-down, select **Form Routing**.

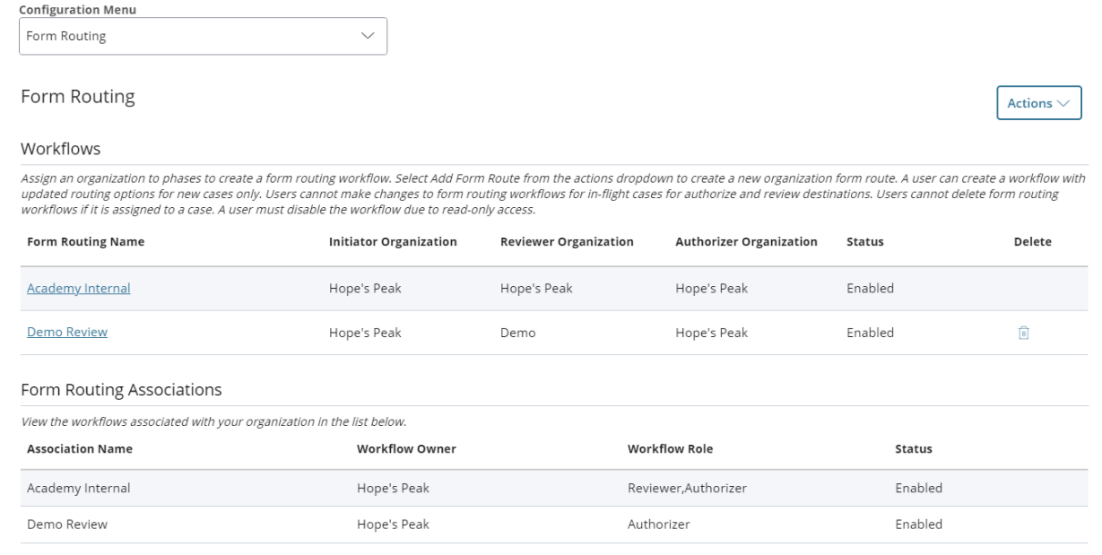


Figure 1: Configurations - Form Routing

Note: From the Actions drop-down you can access the table **History**.

Note: Users cannot delete a form routing workflow if it is assigned to a case. A user can disable a workflow to prevent further use.

# Create a Workflow

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** Tab.
3. From the Configuration menu drop-down, select **Form Routing**.
4. From the Actions drop-down, select **Add Form Route** and complete the form.

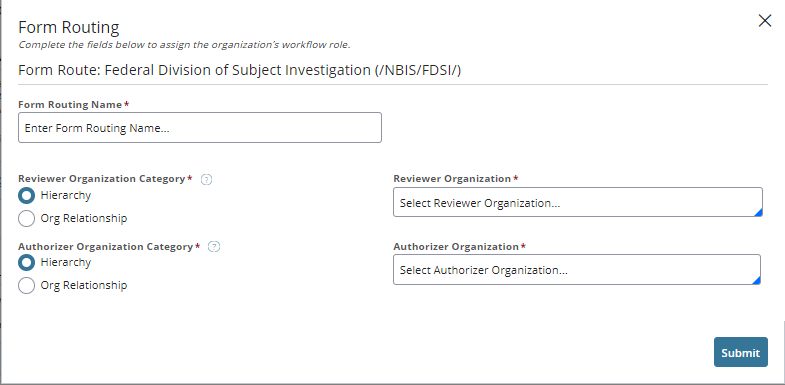


Figure : Form Routing Configuration Modal

* Select **Hierarchy** to choose the same organization in which you are creating the workflow or other organizations within your hierarchy to complete the respective phase.
* Select **Org Relationships** to choose an organization you have established a relationship with that is outside of your organizational hierarchy, to complete the respective phase.

1. Once all required fields are completed, select **Submit** to create and save the new workflow.

# View & Edit a Workflow

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** Tab.
3. From the Configuration menu drop-down, select **Form Routing**.
4. From the Form Routing Name column, select a **Workflow**.
5. Select **Edit** and Update the workflow as needed.

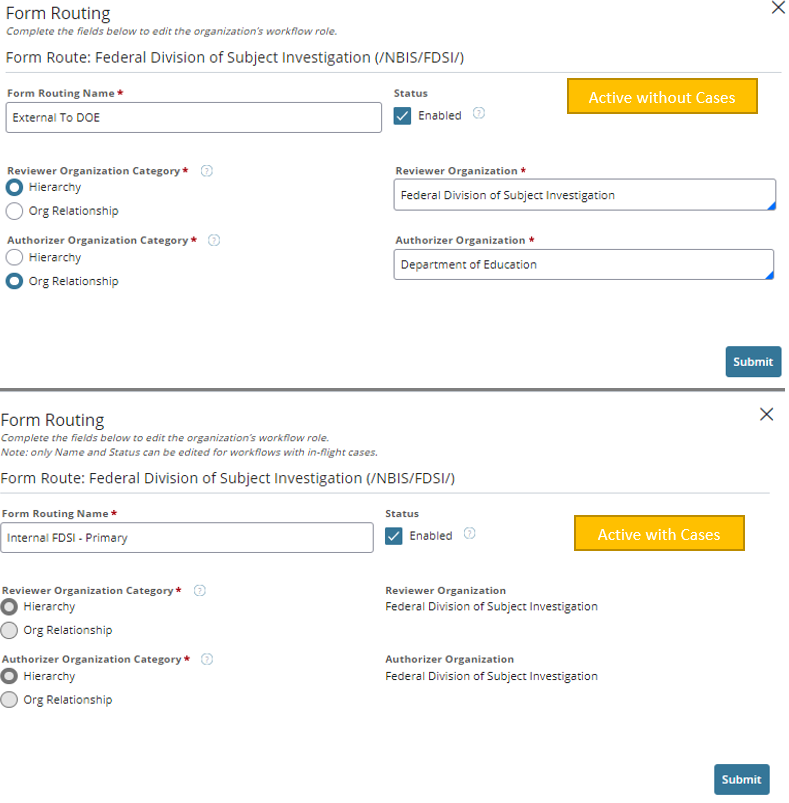


Figure : Edit Options for Form Routing Workflows

Note: Only Name and Status can be edited for workflows with in-flight cases (Authorize & Review).

1. Select **Save**.