



## Managing Form Routing Workflows

**NBIS Release Version:** 4.0

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**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**.

Configuration Menu

Form Routing

Form Routing

Actions

Workflows

Assign an organization to phases to create a form routing workflow. Select Add Form Route from the actions dropdown to create a new organization form route. A user can create a workflow with updated routing options for new cases only. Users cannot make changes to form routing workflows for in-flight cases for authorize and review destinations. Users cannot delete form routing workflows if it is assigned to a case. A user must disable the workflow due to read-only access.

Form Routing Name	Initiator Organization	Reviewer Organization	Authorizer Organization	Status	Delete
<a href="#">Academy Internal</a>	Hope's Peak	Hope's Peak	Hope's Peak	Enabled	
<a href="#">Demo Review</a>	Hope's Peak	Demo	Hope's Peak	Enabled	

Form Routing Associations

View the workflows associated with your organization in the list below.

Association Name	Workflow Owner	Workflow Role	Status
Academy Internal	Hope's Peak	Reviewer, Authorizer	Enabled
Demo Review	Hope's Peak	Authorizer	Enabled

Figure 1: Configurations - Form Routing

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

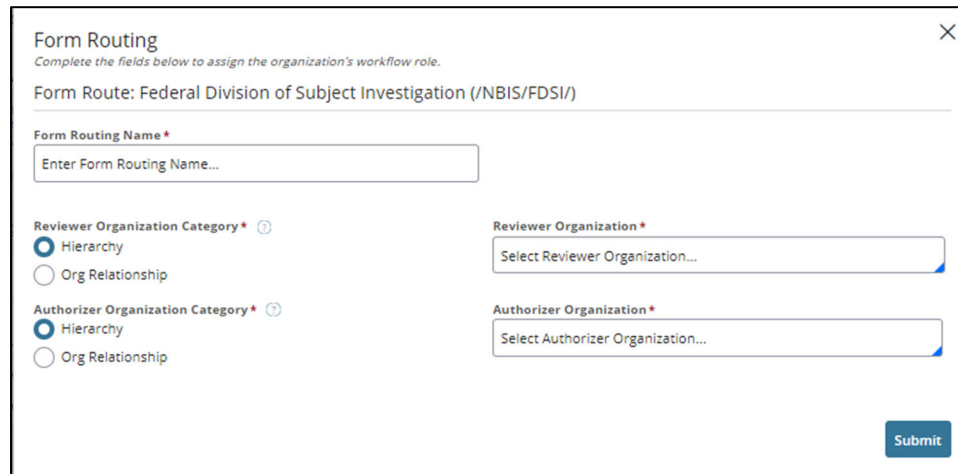
Note: Users cannot delete a form routing workflow if it is assigned to a case. A user can disable a workflow to prevent further use.





## 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.



The modal is titled "Form Routing" with a close button (X) in the top right corner. Below the title is a subtitle: "Complete the fields below to assign the organization's workflow role." The main heading is "Form Route: Federal Division of Subject Investigation (/NBIS/FDSI/)".

There are four main input sections:

- Form Routing Name \***: A text input field with the placeholder "Enter Form Routing Name..."
- Reviewer Organization Category \***: Two radio button options: "Hierarchy" (selected) and "Org Relationship".
- Reviewer Organization \***: A dropdown menu with the placeholder "Select Reviewer Organization..."
- Authorizer Organization Category \***: Two radio button options: "Hierarchy" (selected) and "Org Relationship".
- Authorizer Organization \***: A dropdown menu with the placeholder "Select Authorizer Organization..."

A blue "Submit" button is located in the bottom right corner.

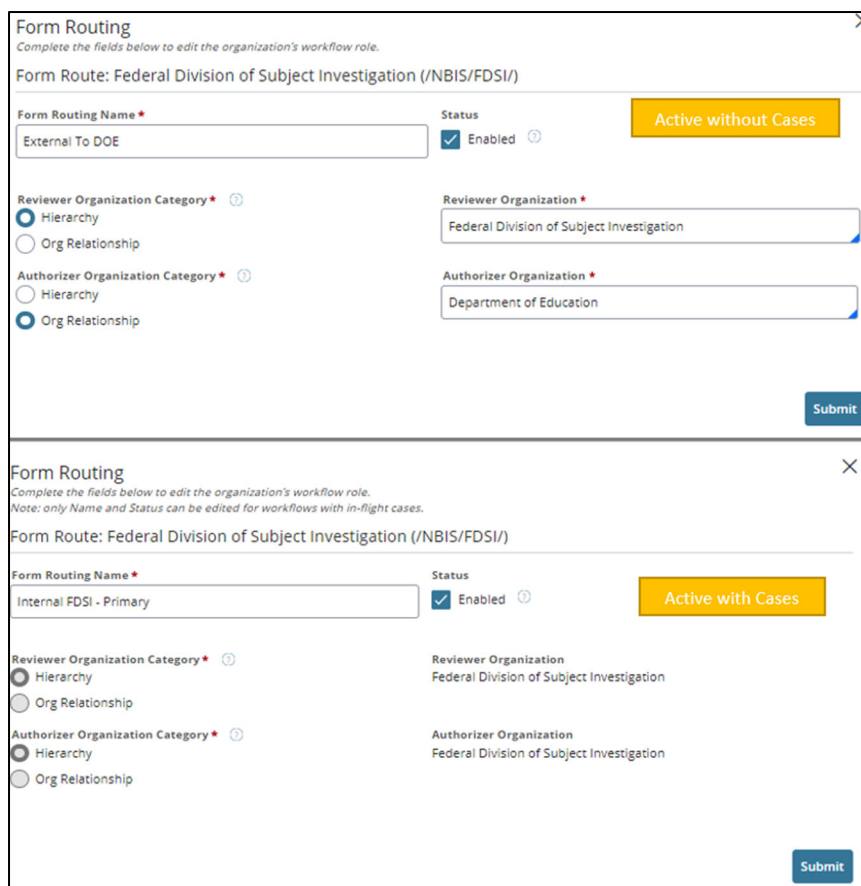
Figure 2: Form Routing Configuration Modal

- 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.
5. 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.




**Form Routing**  
Complete the fields below to edit the organization's workflow role.  
Form Route: Federal Division of Subject Investigation (/NBIS/FDSI/)


Form Routing Name \*  
External To DOE

Status  
☒ Enabled 

Active without Cases

Reviewer Organization Category \*   
☒ Hierarchy  
☐ Org Relationship

Reviewer Organization \*  
Federal Division of Subject Investigation

Authorizer Organization Category \*   
☐ Hierarchy  
☒ Org Relationship


Authorizer Organization \*  
Department of Education

Submit


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**Form Routing**  
Complete the fields below to edit the organization's workflow role.  
Note: only Name and Status can be edited for workflows with in-flight cases.  
Form Route: Federal Division of Subject Investigation (/NBIS/FDSI/)


Form Routing Name \*  
Internal FDSI - Primary

Status  
☒ Enabled 

Active with Cases

Reviewer Organization Category \*   
☒ Hierarchy  
☐ Org Relationship

Reviewer Organization  
Federal Division of Subject Investigation

Authorizer Organization Category \*   
☒ Hierarchy  
☐ Org Relationship

Authorizer Organization  
Federal Division of Subject Investigation

Submit

Figure 3: Edit Options for Form Routing Workflows

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

6. Select **Save**.