

Digital Forms

Multi-stage, Multi-Respondent Workflows

Video Link: vimeo.com/691449962

What are Multi-stage, Multi-Respondent Workflows?

With multi-stage, multi-respondent workflows, a single digital form can be integrated into a workflow process in your organization. You can create workflow stages in a form to match the steps in your company's global or location-specific workflow processes.

1 Create and assign sections of a form to specific stage(s) in your workflow process.

The screenshot displays a configuration interface for a digital form. On the left, a form preview shows 'Stage 1' with a 'Facility Location' dropdown menu set to 'Denver'. On the right, a configuration panel includes a list of locations (Denver, Houston, Phoenix) with expand/collapse, delete, and help icons. Below this are fields for 'Custom Class' and 'Custom ID'. A 'Workflow' section, highlighted with a red box, contains a list of stages: 'Stage 1' (checked), 'Stage 2', 'Stage 3', and 'Stage 4'. An 'Edit Workflow' button is located to the right of this list. At the bottom of the configuration panel is a 'Field Status' section.

2 Designate respondents from any location or in any role in your company to each stage in your form.

The screenshot shows a configuration interface for assigning respondents to a form stage. A 'Title' field is set to 'Stage 2'. A 'Respondents' section, highlighted with a red box, contains two dropdown menus: 'Evaluator 1' and 'Company Role'. Below these are two buttons with plus signs. To the right, a list of roles is shown: 'Chief Safety Officer (CSO)' and 'Health & Safety Manager', each with a close button. Below the list are radio button options: 'Global' (selected), 'Location Specific', and 'Location and Child Location'. At the bottom right are 'Revert' and 'Save' buttons.

3

Schedule stages in your form to match deadlines or milestones in your workflow processes.

Time Delay
To release the stage with a time delay. Choose a delay setting from the dropdown below, and enter the length of the delay. The form will remain in-progress with the previous stage's respondent until the delay expires.

On a specific date April 14

Allow editing until release

4

Customize the pop-up confirmations delivered to users after they submit the fields in their stage.

Success Popup
This is the message displayed to the respondent when the form is successfully submitted to the next stage

English Translate

Thank you for completing the **Stage 1 - Service Request** of this form! A technician will be assigned to complete the next stage of this form and contact you if any follow-up is required.

5

Customize email notifications to designated respondents when their stage is released and ready for them to fill out.

Stage Notification
Customize the notification sent to the respondents in this stage using the fields below.

Assigned to User English Translate

Available variables
(Form Title)
(Form Assignee Name)
(Form Start date)
(Previous Stage Respondent Name)
(Current Stage Respondent Name)
(Previous Stage Title)
(Current Stage Title)
(Launch Form Link)

Subject
You have been assigned Stage 3 in (Form Title)

Message
Paragraph **B I** [Text Alignment] [List] [Link] [Code]

Hi (Current Stage Respondent Name),
{Previous Stage Respondent Name} has completed their inspection and entered their results in Stage 2 (Previous Stage Title). Please review and approve the inspection results by signing off in Stage 3 (Current Stage Title).
Click here (Launch Form Link) to access (Form Title).
Thank you kindly.

Benefits of Multi-Stage, Multi-Respondent Workflows:

- Ensures sections are completed and verified before proceeding to the next sections
- Ensures users have all prior information so they can better complete their sections
- Reduces the number of forms required
- Reduces admin and overhead time
- Information can be added to a single form from contributors across your organization
- Verification and approval can be incorporated in the form at various stages