Using Conditional Routing

**Note**
This is taken from an email from Dynamic Forms. A better step-by-step guide to come.

To route your forms like a post-form routing form with a conditional routing workflow, you’d need to first build the area that participants will enter the contact information for the participants on your form itself. With post form routing, you’re able to enter their information at the end of the form, so you would need to create fields that collect First Name, Last Name, and Email of each participant that needs to be routed in this manner.

If you are going to use a dropdown to determine who should sign the form, you will need to set up the values of the dropdown in this manner:

[FirstName],[LastName],[EmailAddress]

Example: Ryan,Silva,ryan@ngwebsolutions.com

By separating each value with a comma, we will know how to differentiate which value from the other.

Once this has been done for each user in the dropdown or once you’ve created the appropriate first name, last name and email fields, you will need put in some “filler” data for each participant. When adding the faculty, chair, dean and osp officer, you’ll want to set the way that the user is designated to “I will specify the user” and put generic information in for the contact info like this:

This will act as a placeholder so that users do not need to manually input the contact information for this participant.
Once that is complete for each participant, you will need to click on the “Events” tab and click “Add Event.” From there, you can select "GENERAL: Designate cosigner from form data" for the Event Type. You can give the event a name, but I’d recommend naming the event the same as the participant that will be prefilled. The next step is to select the cosigner(participant) that will be prefilled. Under that field, you’ll see 3 columns – First Name, Last Name and Email. There will also be 3 rows – Page Item, Transformation and Index. The columns represent the information that will be used to prefill the participants contact info. The rows indicated what will be used to assign that info for the contact information.

If you’re using a dropdown to determine the participant information, you can reference the same Page Item. If you have separate fields that collect the first name, last name and email, you’ll want to make sure you use those fields in the appropriate locations. The transformation is just the delimiter so if you use the commas like mentioned above, you will select “Comma-delimited(,)” for First Name, Last Name and Email. You’ll want to make sure to set the correction transformation if you’re using a dropdown to determine who the participant is. The Index represents the location of that value in the string of info. Since first name comes first, the index value will be 0, last name will be 1, and email will be 2. Again, you’ll want to make sure to use this if you’re using a dropdown on your form that determines the participant. I’ve included a screenshot of what it would possibly look like when completed. This example shows from a dropdown:

This is an example of an event that uses separate fields on a form:
You would need to follow these steps for each participant on the form.