User Input

Purpose

Presents the user with an auto-generated form or a pop-up picker window, to input data for use in the workflow.

Properties

The 'user input' activity can present the user with a form or a pop-up picker to input data for use in a workflow as Variables or Inputs

Setting	Description
For Person	The person who is presented with this input
Record	The record that will be presented to the person when opening the task
Task name	The user input task name in the message box
Prompt	Text to display at the top of the form or in pop-up picker window
Display as	Select either **Form** or **Pop up** to display
Add Workflow Inputs or Variables	Add variables or inputs that will be displayed to the user
Save for later	Option for the user to complete the user input at a later time

Parameters created

None

User Input activity has the ability to filter one input variable list based on another. This

can be configured between choice fields, lookups or even relationships.

How to set up a filtered list on a User input activity

Whether you are filtering between choice fields, lookups or even relationships, it is all dependant on a parent-child relationship and the set-up on a report and its analyser conditions. The report of the child relationship must contain the parent as a filter on the analyser.

The example below describes how to filter between Campus and Buildings lookups and assumes you already this scenario configured.

1. Open up the child report the in **Report Builder** that you would like to use for the workflow, in this case a Building report
2. Add the Campus lookup as a condition on the **Analyser**
3. **Save** the report
4. Create a new Workflow
5. Select the **Start** activity and add select **New Input Parameters**
6. Select the object **Definition** of where you would like this workflow to be based on
7. Select **New Variable** and add to Campus details:
   1. **Name:** Campus
   2. **Type: Record List**
   3. **Definition:** Campus
8. Select **New Variable** again and add Building details:
   1. **Name:** Building
   2. **Type: Record List**
   3. **Definition:** Building
9. Add **User Input** activity to the workflow
10. In the **User Input** activity properties select **Add Workflow Inputs or Variables** for Campus:
    1. **Variable Name:** Campus
    2. **Report:** Campus Report
11. Select **Add Workflow Inputs or Variables** for Building:
    1. **Variable Name:** Building
    2. **Report:** Building Report
    3. Select the funnel icon and **Add Filter** and select the parent in **Filter by field** and **Parameter**
12. **Save** the workflow