OLD DOMINION UNIVERSITY

Forms:
Set Up Approval Workflows

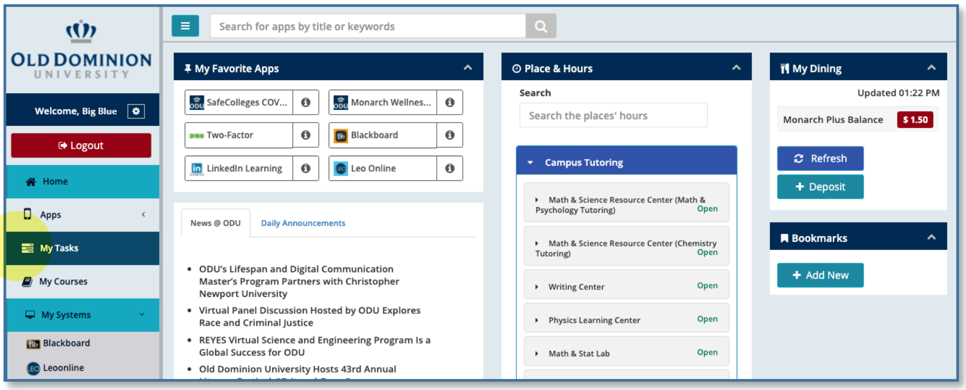
Before setting up workflow

When creating your form in the Forms tool, you should set expectations for potential submitters. Let them know that when they hit **Submit**, the next steps will require approval and that they'll receive notifications when their form is approved or denied.

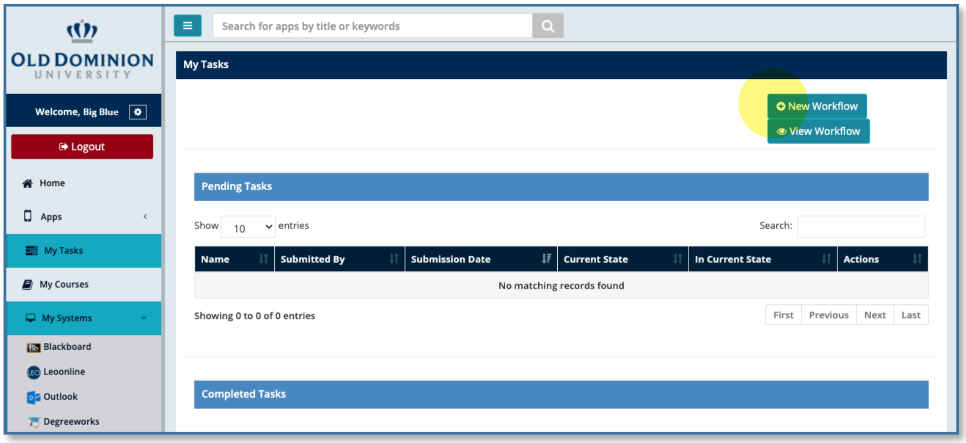
You should also be sure that your form requires authentication, especially if you need the submitter's supervisor or budget unit director approval. The system needs to know who the submitter is before the form can be passed up a chain.

Create a workflow

1. Log in to my.odu.edu and click **My Tasks** in the left-hand menu.



2. Click **New Workflow**.



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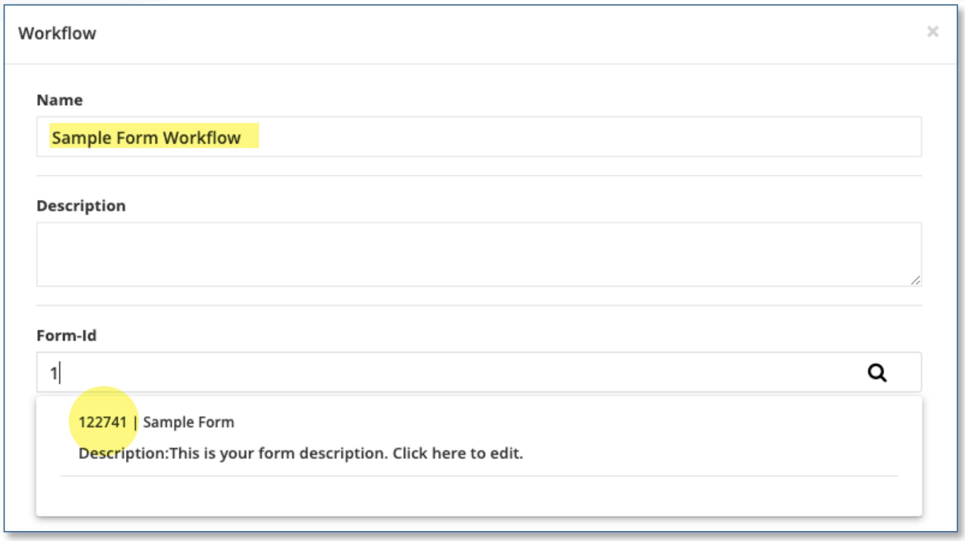
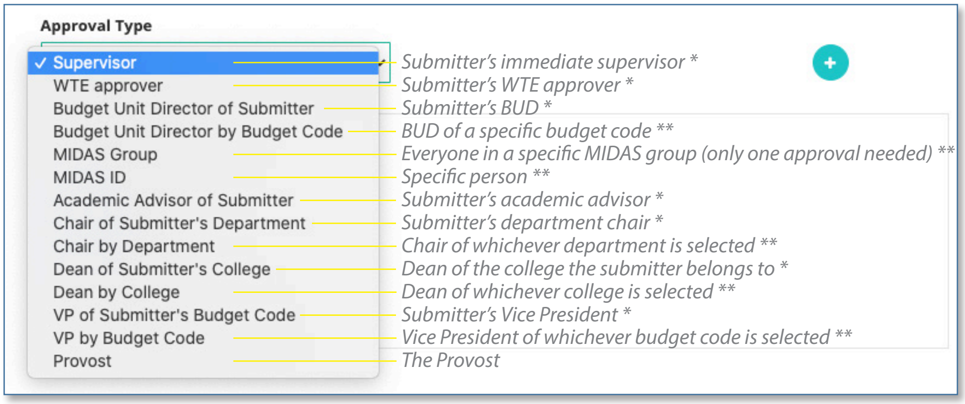
3. Name your workflow, and start typing in the form number. The field will automatically start displaying forms that you have access to in the Forms tool. When the form you're looking for pops up, click on it.

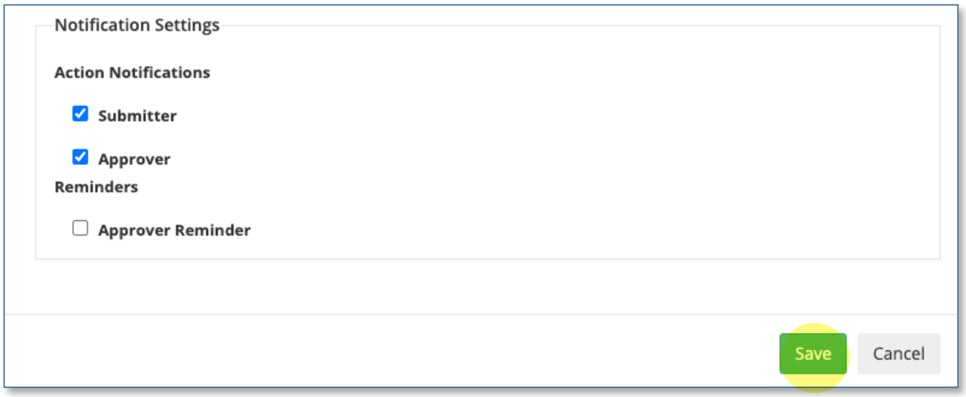


4. Select an approver: Who should sign off on the form before it is submitted? Use **Plus** sign to add additional approvers.



** Approval types based on the submitter are determined by information found in Banner.*
*** Start typing a department, college, name or budget code into the box that appears. As you type, the field will auto-populate and you can make your selection.*

5. Decide who should receive notifications as requests are approved or denied, then click **Save**.



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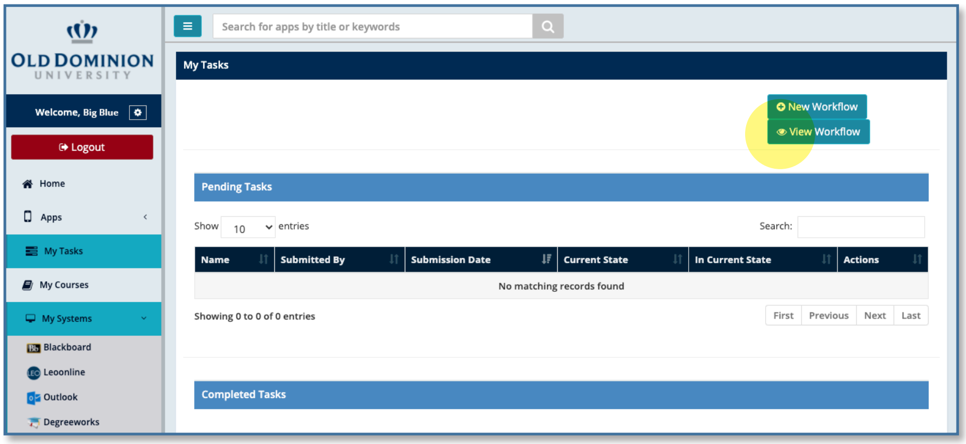
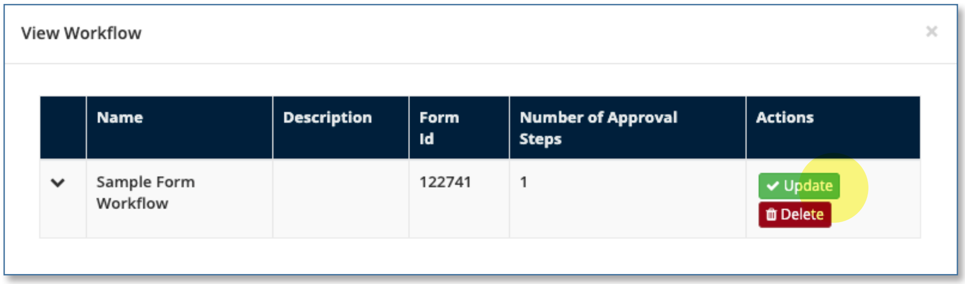
Edit a workflow

1. From [my.odu.edu](my.odu.edu), click **My Tasks**, then **View Workflow**.



2. You'll see all of the workflows you've created. Select the one you want to edit and click **Update**.



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