

Forms: Set Up Approval Workflows

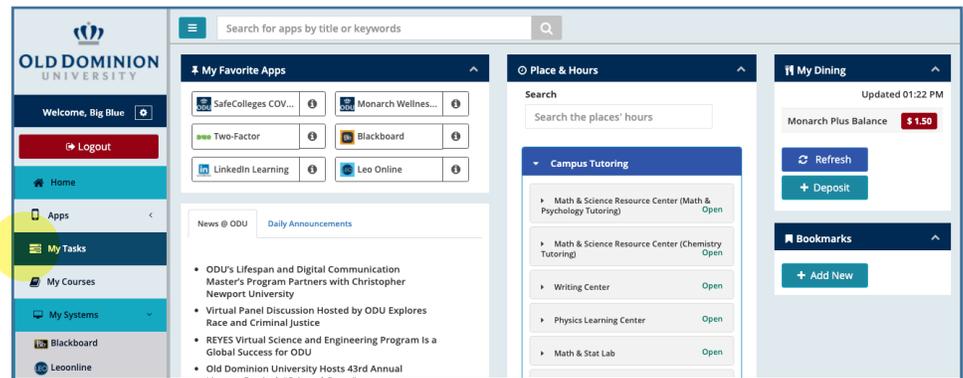
Before setting up workflow

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.

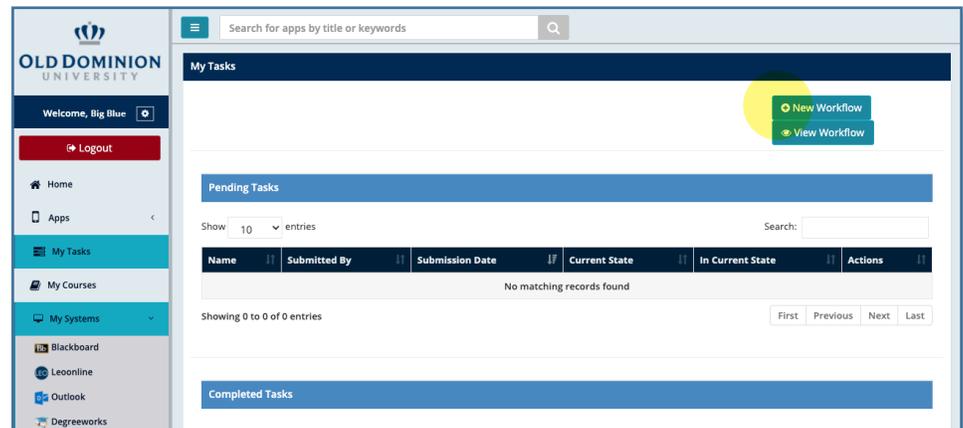
You should also be sure that your form requires [authentication](#), especially if you need the submitter's supervisor or budget unit director approval. The system needs to know who the submitter is before the form can be passed up a chain.

Create a workflow

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



2. Click **New Workflow**.



- 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.

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

Approval Type	Description
<input checked="" type="checkbox"/> Supervisor	Submitter's immediate supervisor *
<input type="checkbox"/> WTE approver	Submitter's WTE approver *
<input type="checkbox"/> Budget Unit Director of Submitter	Submitter's BUD *
<input type="checkbox"/> Budget Unit Director by Budget Code	BUD of a specific budget code **
<input type="checkbox"/> MIDAS Group	Everyone in a specific MIDAS group (only one approval needed) **
<input type="checkbox"/> MIDAS ID	Specific person **
<input type="checkbox"/> Academic Advisor of Submitter	Submitter's academic advisor *
<input type="checkbox"/> Chair of Submitter's Department	Submitter's department chair *
<input type="checkbox"/> Chair by Department	Chair of whichever department is selected **
<input type="checkbox"/> Dean of Submitter's College	Dean of the college the submitter belongs to *
<input type="checkbox"/> Dean by College	Dean of whichever college is selected **
<input type="checkbox"/> VP of Submitter's Budget Code	Submitter's Vice President *
<input type="checkbox"/> VP by Budget Code	Vice President of whichever budget code is selected **
<input type="checkbox"/> Provost	The Provost

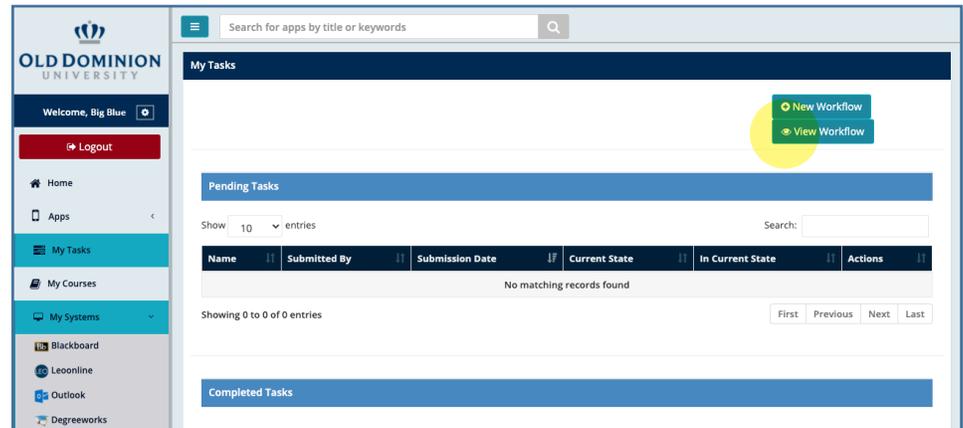
* Approval types based on the submitter are determined by information found in Banner.

** 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.

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

Edit a workflow

1. From 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**.

