

- Cornerstone
- Jira Procedures
- Reporting
- Core
- Learning
 - Certificate Overview
 - Certifications
 - Connect Overview
 - Creating Approval Workflows
 - Creating a Test
 - Creating Deep Links
 - Curriculums
 - CustomGuide Process
 - Data Merge
 - Evaluations
 - Events, Sessions, Rosters User Gu
 - Events and Sessions
 - HTML Script for ILT Zoom Sessio
 - Learning Assignment Tool (LAT)
 - Learning Job Aids
 - Learning Objects Overview
 - Mobile App Login
 - Mobile App Navigation
 - New Employee Orientation (NEC
 - On the Job Training Overview
 - Removing Trainings with the Trai
 - System Generated Emails
 - Test Reset
 - Uploading Online Courses
- Space tools

Creating Approval Workflows

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An Approval Workflow enables administrators to create approval workflow templates for learning objects (LO). Approval can be set based on numerous criteria such as users, departments, manager and groups.

Create an Approval Template

1. Navigate to **System Mgmt > Configuration Tools > Learning > Learning Preferences > Default Approval Workflow Templates**.
2. Click **Create New Approval Template**.
3. Give the template a name by typing in the box labeled **Approval Template Name** then click on the icon next to **Approval Step Number**

Approval Workflow Templates

Define Approval Template

Approval Template Name

Approval Step Number

Approver(s)

Save

Cancel

4. Here is where you will select the criteria for approval from the drop down- ex. user, group, division, etc. Choose the criteria you want and click the icon to make a selection.

Approval Workflow Templates

Define Approval Template

Approval Template Name

Approval Step Number

Approver(s)

Save

Cancel

Select Criteria

Employee Relationships

Division

Job Code

Grade

Division/Department

Work Location

Group

Cohort Roster

Self Registration Group

Job Family

HR Business Partner

Department Family

Program Type

Client Type

Credit Type

Country

Employer

Users

Create New Group

5. If you plan to use a group, create that before moving forward by clicking the **Create New Group** link. Groups are useful because you can set multiple users, depts. in the group.
6. You can create multiple levels of approval as in this example showing the **URMC: Custom Guide Approval Workflow**. In this example, there are two approval steps; step one uses the criteria **Employee Relationships** and selecting **Manager**. Step two uses the group **Security Group - URMC L&D Approval Workflow**.

Approval Workflow Templates

Define Approval Template

Approval Template Name

Approval Step Number

Approver(s)

Save

Cancel

1

2

Manager

Select Criteria

Create New Group

All users in Group: Security Group - URMC L&D Approval Workflow

Select Criteria

Create New Group

7. The next step is to choose the learning object you want to attach the workflow to by searching for the LO in the **Course Catalog**.

Course Catalog

What would you like to search for?

Training

Search

Refine search

Published

Active

By Relevance

Show Courses with Recurrence

Created by Me

Title

Provider

Version

Language

Created Date

Modified Date

Actions

Microsoft Teams

CustomGuide

1.0

English (US)

9/27/2022

9/27/2022

Edit

Assign

View as User

Microsoft Teams

CustomGuide

2.0

English (US)

9/30/2020

9/30/2020

Microsoft SharePoint 2016

CustomGuide

1.0

English

3/15/2022

3/15/2022

8. Under **Actions** click the arrow and choose **Edit**. On the next screen click the **Approval Workflow** tab.

Edit Microsoft Office 2021 Online Training

Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.

General

Subjects

Skills

Competencies

Acknowledgement

Approval Workflow

Edit Training

9. Now we need to define the workflow. In the drop down box that says **Select Criteria**, we need to select the audience for the workflow. In the below image we chose **All users in Division: 01 - University of Rochester** and the **Subordinates**.

Approval Workflow

DEFINE APPROVAL WORKFLOW BY ORGANIZATIONAL UNIT (OU) RULES

Select Criteria

Create New Group

Rank

Criteria

1

All users in Division: 01 - University of Rochester

Include Subordinate OUs

Effective Period: 2/3/2023 10:56 AM To: 12:00 AM

Crisis Prevention Session Approval

None

Advancement: CustomGuide Approval

CU-SP Course Registration

CPI Session Approvals

Crisis Prevention Session Approval

EH&S Fundamentals of Radiation Safety for Irradiators

HR Manager Only

HR Managers Plus COE

JMH Custom Guide Approval Workflow

JMH Custom Guide Approval Workflow 2 Lvl

Learn Rhythm Pediatrics - L&R

NHM Custom Guide Approval Workflow

Patient Safety Certificate Course

PHSA-CTSA-00101-1001-1001

Cancel

Save

10. From the bottom drop down box select the template you created in the earlier steps. If you need to select another template repeat step 9. You can change the order of multiple templates by changing the **Rank** number. When finished click **Save**.
11. There are a couple of **Required Training Approvals** sections within the LO that need to be updated;
 - Under the **General** tab, scroll to the bottom and find **Required Training Approvals** and put the number of approvals needed in the box.
 - For events and sessions, **Required Training Approvals** can be found under **Session Details** at the event level and the **Details** section on the session level.
 - The number you enter needs to be plus one because **Required Training Approvals** on the user record is set as 1. So, if you have one approval, the number should be 2.
12. Finally, navigate to **Availability** and uncheck **Pre-Approved** and make sure **Register Upon Approval** is selected.

General

Subjects

Skills

Competencies

Acknowledgement

Approval Workflow

Availability

Emails

Recommendations

Training Units

12

Availability Selection Criteria

Select Criteria

Create New Group

REMOVE CRITERIA

All users in Division: 01 - University of Rochester

INCLUDE SUBORDINATES

PRE-APPROVED

REGISTER UPON APPROVAL

Viewing, Approving & Denying Approval Requests

1. The approver can view pending requests by navigating to **Standard Reports > Track Employees > Pending Requests**.

Track Employees

ILT

Training

Billing

Custom Form Data

Displays user data collected from form submissions

Form Management Status

Displays status summary information for compliance forms.

No Show Details

Displays sessions where one or more students did not attend the required number of pa

Past Due

Displays employees past due training.

Past Requests

Displays training requests you have already approved, deferred, or denied. You may ch

Pending Requests

Displays outstanding training requests you must approve, defer, or deny.

2. Click the Approve ✓, Defer ⚠, or Deny ✗ icon under the **Options** column. If an approval is deferred by the first approver, then the second approver acts as the first approver when applying approvals.

Training Pending Approval

Printable Version

Export to Excel

(1 Result)

Name

Search

Requested By

Abate, Amany

50 - Strong Memorial Hospital (Division)

500431 - Emrgy Nrsq G-16/SMH (Division/Department)

Training

Verbal Intervention (with disengagement skills)

(Starts 2/20/2023)

Type

Initial

Date

2/3/2023 4:14 PM

Purpose

Options

✓

⚠

✗

3. From the user's end, once an LO is requested that has an approval attached, it will indicate **Pending Approval**. Here's an example for a session:

FEB

February

Mon, Feb 20, 2023, 8:00 AM - 12:00 PM

Register by Sun, Feb 5, 2023, 8:00 AM

Louise Slaughter Conference Room (1-9555)

English (US)

View Details

Request

View Details

Pending Approval

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- Learning Objects Overview

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