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## **Creating Approval Workflows**

Created by <u>Harris, Jeffrey</u>, last modified on <u>02/06/2023</u>

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.

Q Search

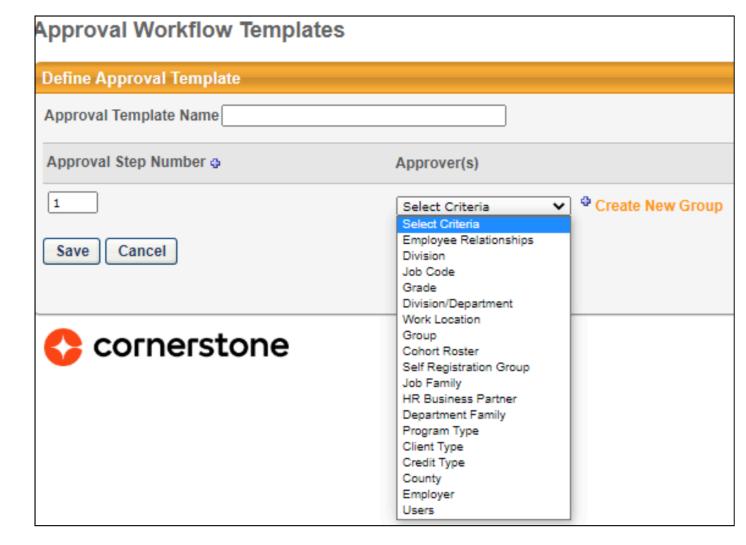
Create an Approval Template

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** 

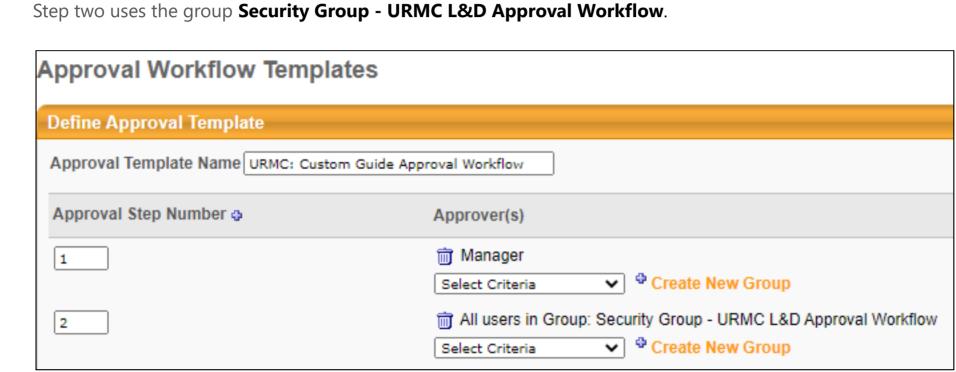
Approval Workflow Templates **Define Approval Template** Approval Template Name Approval Step Number 4 Approver(s) Cancel Save

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.

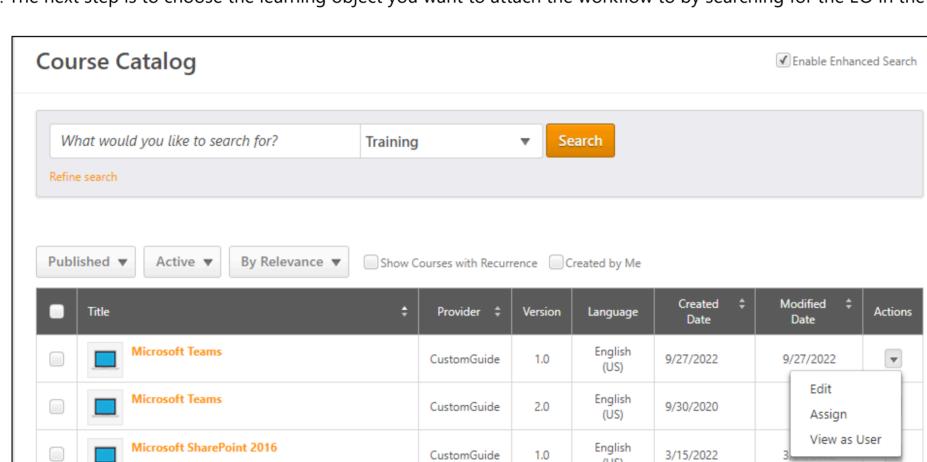


5. If you plan to use a group, create that before moving forward by clicking the **Create New Group** link. Groups are useful because you can set multiple users, depts. in the group.

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.



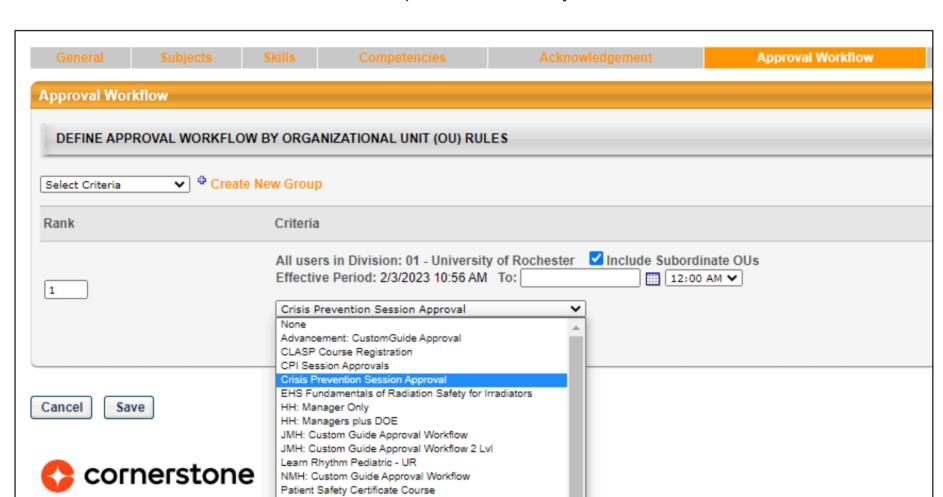
7. The next step is to choose the learning object you want to attach the workflow to by searching for the LO in the **Course Catalog**.



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



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.



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.

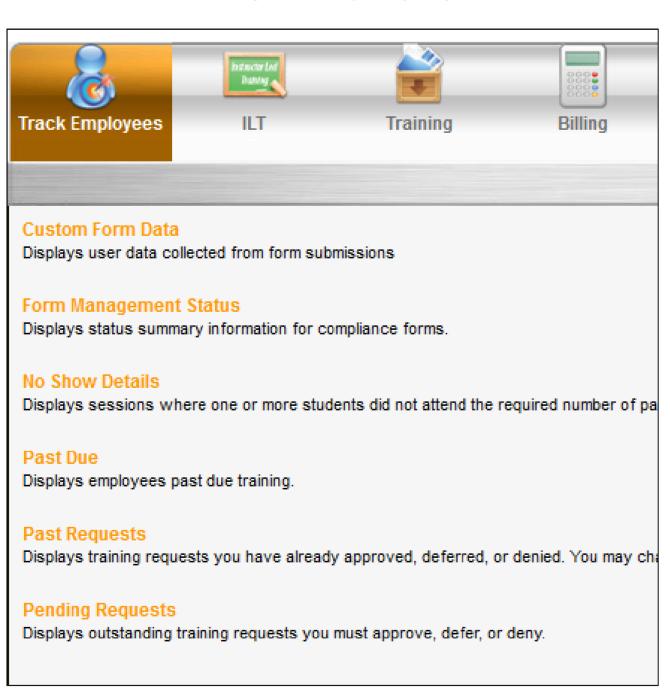
-For events and sessions, Required Training Approvals can be found under Session Details at the event level and the Details section on the session level. -The number you enter needs to be plus one because **Required Training Approvals** on the user record is set as 1. So, if you have one approval, the number should be 2.



Viewing, Approving & Denying Approval Requests

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

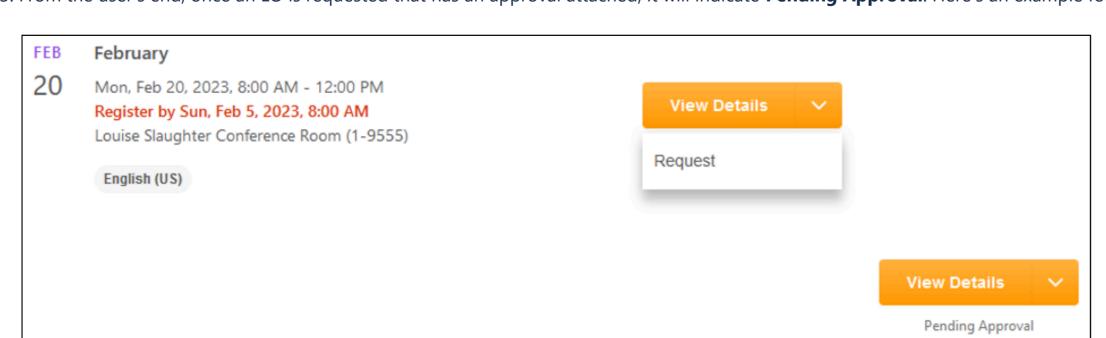
12. Finally, navigate to Availability and uncheck Pre-Approved and make sure Register Upon Approval is selected.



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.



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:



Related articles

Creating Approval Workflows **E** Learning Objects Overview

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