



# Approval workflow activity

 <b>By the end of this activity, you will be able to:</b>	 <b>Follow these steps to get the course activity assets</b>
<ul style="list-style-type: none"><li>• Create an approval workflow</li></ul>	<ol style="list-style-type: none"><li>1. Go to the Get the Course Activity Assets lesson on the left</li><li>2. Click the appropriate link for your region</li><li>3. Open the following sheet: 03_Automation Course Assets &gt; 11_Approval Workflow Activity &gt; 11_Marketing Request Tracker - Approval Workflow</li></ol>

## Add approval actions

### Update 1: Manager approval for new and urgent requests workflow

In this activity you'll update the alert you created in the previous lesson. Go to the Automation menu > Manage workflows > Edit the Alert for new and urgent requests.

Before any of your employees are notified about a request you want to approve the request. You can leave the trigger as is, but then you'll add an approval for every new request. So your workflow reads like this: When a request is submitted, send yourself an approval request. If you approve the request perform the existing actions. If you decline the request, alert the submitter that their request has been declined.

- Approval workflow
  - Insert a new approval action below the trigger (blue plus button > add an action > Request an approval)
  - Send to specific people: send to yourself
  - Save responses to: default choice
- If approved: follow all previous actions
- If declined: send an alert to the requestor email with a customized message

## Update 2: Director approval for urgent requests

In this activity you'll update the alert you created in the previous lesson. Go to the Automation menu > Manage workflows > Edit the Alert for new and urgent requests.

Before any of your employees are notified about urgent requests you want your Director to approve the request. You can leave the trigger and first approval as is, but then you'll add an approval for every new urgent request. So your workflow reads like this: When a request is submitted, send yourself an approval request. If you approve the request check if the urgent flag is checked. If it is, send an approval to your director. If your director approves the request, alert the assigned employee. If your director declines the request, alert yourself and the requestor e-mail.

- Approval workflow
  - Insert a new approval action below the condition that checks if URGENT is Checked (blue plus button > add an action > Request an approval)
  - Send to specific people: send to yourself (in practice this would be your Director's e-mail)
  - Save responses to: default choice
- If approved: follow all previous actions
- If declined: send an alert to the requestor email with a customized message

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*Great job! You reached the end of the activity!*