ONLINE FORM APPROVAL

The objective of this documentation is to instruct authorized users on the process for reviewing and approving online workflow request that have been submitted to them.

SECTION 1: ACCESS THE ONLINE FORM APPROVALS

1. Log in to UNF **myWings**
2. Select the **Staff tab**
3. Under **My Applications** click **"Online Form Approvals"**

SECTION 2: TYPES OF REQUEST(S)

1. **Request(s) to Review**
   a. List of request(s) submitted to you for review and approval.
2. **Request Saved but Not Submitted**
   a. List of request(s) saved by you to be completed and submitted at a later time.
3. **Pending Requests**
   a. List of status of request(s) you have previously submitted.

SECTION 3:
REVIEW & APPROVE REQUEST(S)

To open a VPR that has been sent to you for approval

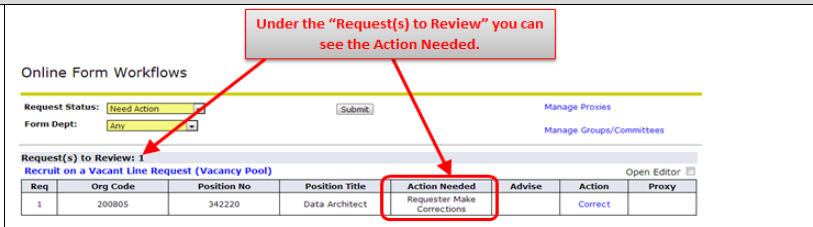
1. Log in to myWings under your **Staff** Tab
2. Under **My Applications**
3. Click **Online Form Approvals**

You will see the following:

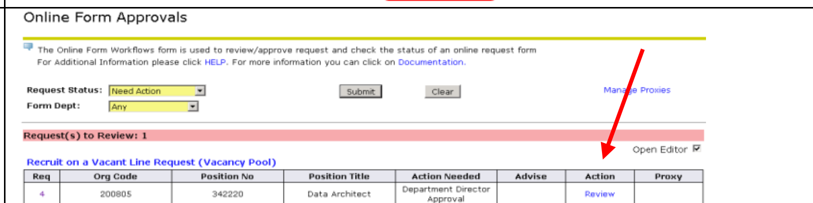
- **Request(s) to Review** – Shows a list of request(s) submitted to you for review and approval.
- **Request(s) Saved But Not Submitted** – Shows request(s) saved by you to be submitted at later time.
- **Pending Request(s)** – Shows the status of request you have previously submitted.

STEPS TO APPROVE A REQUEST

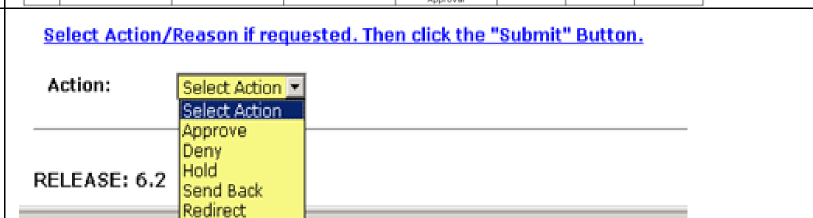
1. Review and make a decision on a request.



2. **Click the link** under "Action" to select the request you want to review.



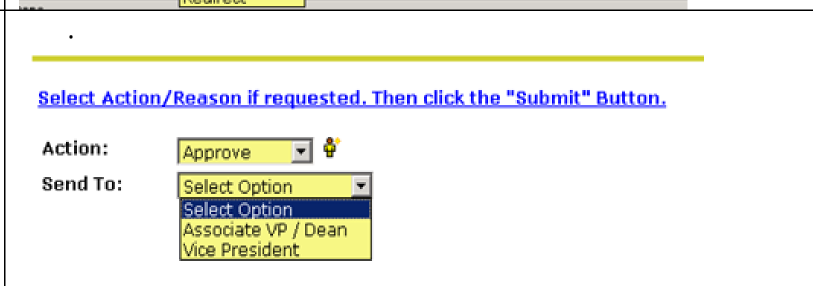
3. **Select an "Action"** at the bottom of the page



4. **Select "Send To"**

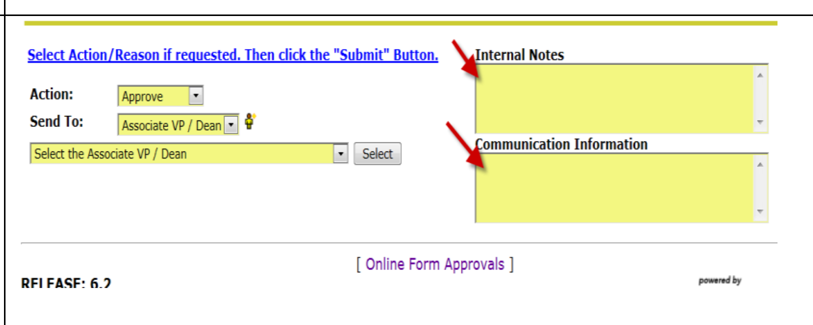
   If you are a Director, depending on your department's established guidelines, you may be required to forward the VPR to an Associate VP or Dean for review. In this case, the Associate VP or Dean will forward the request to the Vice President.

   NOTE: If the next step is a person (Not an Office or Department) then select the person.



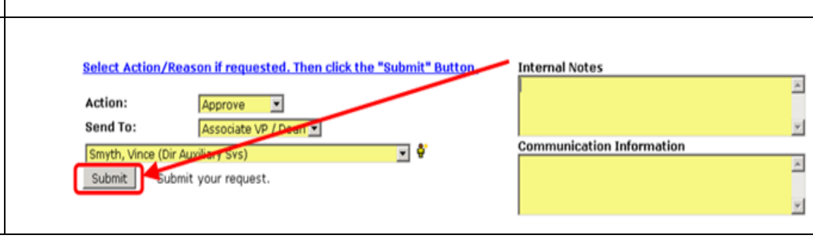
5. **Enter Comments** in one of the two places below

   - **Internal Notes** - Only the person entering the comments can see these notes. If this is a committee/office (group approval), they will be able to view these comments as well.
   - **Communication Information** – Everyone in the workflow routing who touched the request can view these comments/notes.



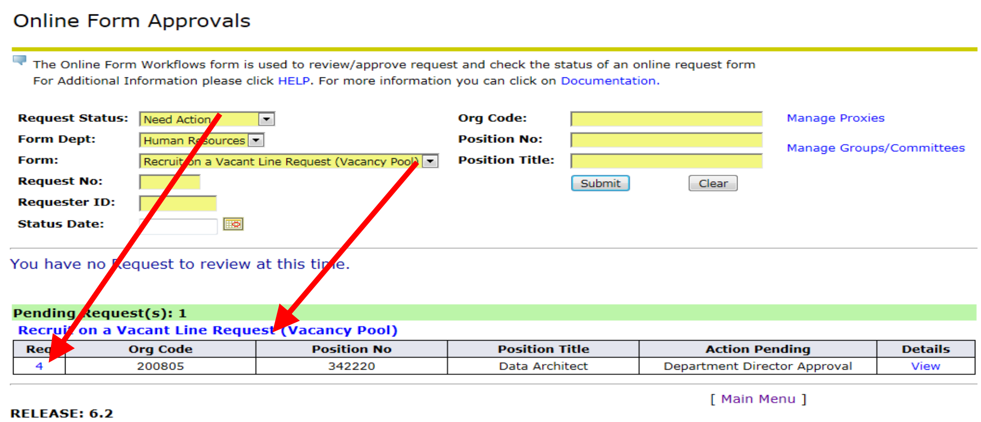
6. **Click** the **"Submit"** button

7. A system-generated email will be sent to the next group, committee or individual in the approval queue.



SECTION 4:
CHECK THE STATUS OF THE REQUEST

The default view shows any request you have pending (Status = “Need Action”) under “Pending Request” (see Green highlighted section below).



Online Form Approvals

The Online Form Workflows form is used to review/approve request and check the status of an online request form
For Additional Information please click HELP. For more information you can click on Documentation.

Request Status: Need Action
Form Dept: Human Resources
Form: Recruit on a Vacant Line Request (Vacancy Pool)
Request No:
Requester ID:
Status Date:
Org Code:
Position No:
Position Title:
Submit Clear
Manage Proxies
Manage Groups/Committees

You have no Request to review at this time.

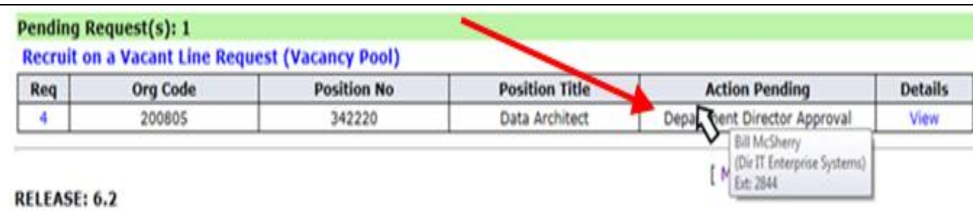
Pending Request(s): 1
Recruit on a Vacant Line Request (Vacancy Pool)

Req	Org Code	Position No	Position Title	Action Pending	Details
4	200805	342220	Data Architect	Department Director Approval	View

[Main Menu]

RELEASE: 6.2

If the request is with an individual (e.g. Director, Associate VP, Dean or Vice President) you can see the person’s name and phone extension by placing your mouse over the “Action Pending”.



Pending Request(s): 1
Recruit on a Vacant Line Request (Vacancy Pool)

Req	Org Code	Position No	Position Title	Action Pending	Details
4	200805	342220	Data Architect	Department Director Approval	View

RELEASE: 6.2

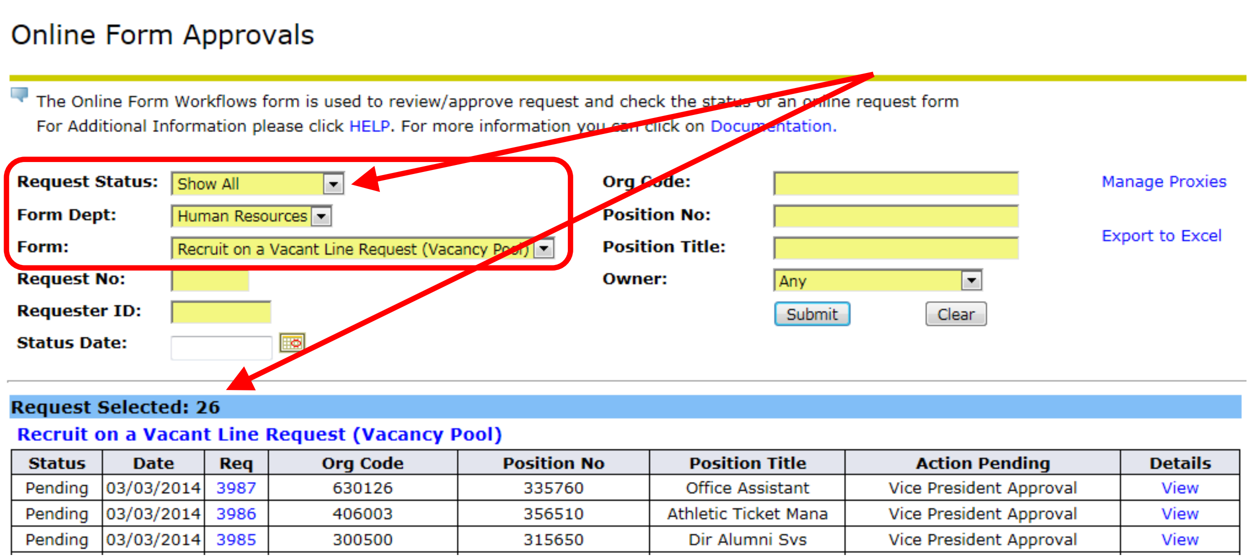
NOTE: *Offices and Committees e.g. HR, Budget Office, and Vacancy Pool Committee, will not be seen.*

To view ALL items initiated or approved by you, do the following:

A. **Select** “Show All” in the Request Status field
B. **Select** “Department who owns the form (i.e. HR for Recruit on a Vacant Line Request) in the Form Dept field
C. **Select** “Form” in the Form field (i.e Recruit on a Vacant Line Request)

NOTE: You will have the option to filter the output by other items:
Example: Recruit on a Vacant Line Request, you will have the option to filter by:

- Request Number
- Organization Code
- Position Number
- Position Title
- Owner (The location in the workflow).



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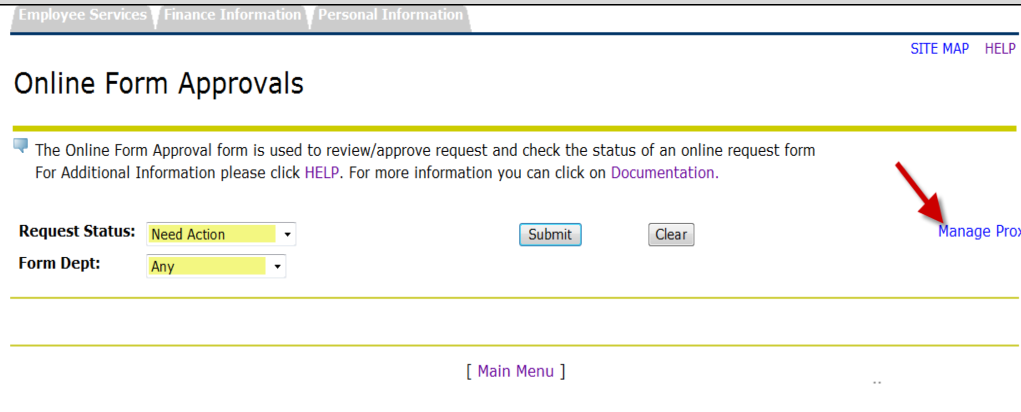
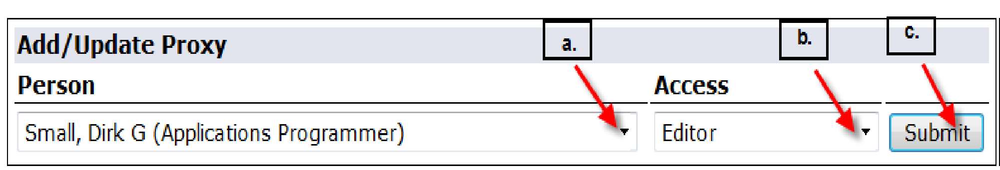
Request Status: Show All
Form Dept: Human Resources
Form: Recruit on a Vacant Line Request (Vacancy Pool)
Request No:
Requester ID:
Status Date:
Org Code:
Position No:
Position Title:
Owner: Any
Submit Clear
Manage Proxies
Export to Excel

Request Selected: 26
Recruit on a Vacant Line Request (Vacancy Pool)

Status	Date	Req	Org Code	Position No	Position Title	Action Pending	Details
Pending	03/03/2014	3987	630126	335760	Office Assistant	Vice President Approval	View
Pending	03/03/2014	3986	406003	356510	Athletic Ticket Mana	Vice President Approval	View
Pending	03/03/2014	3985	300500	315650	Dir Alumni Svs	Vice President Approval	View

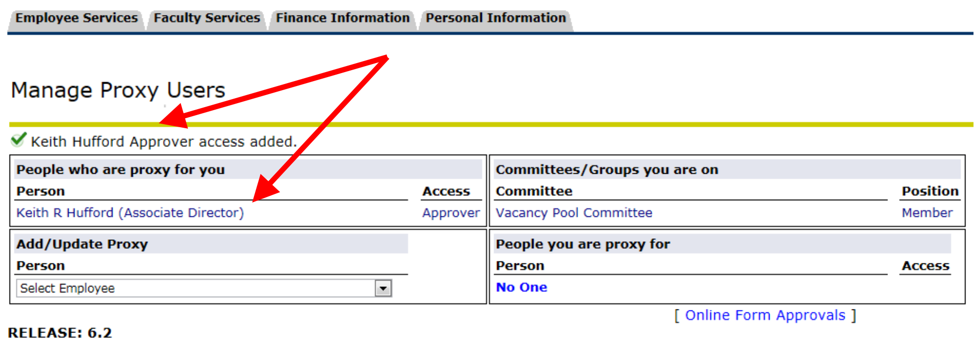
SECTION 5:
MANAGE PROXY ACCESS

This section allows you to grant others the authority to review and approve items that are in your queue (typically in your absence).

STEPS TO MANAGE PROXY ACCESS	
1. Log in to <u>myWings</u> under your **Staff** Tab 2. Under **My Applications** 3. Click **Online Form Approvals** 4. Click on the link **Manage Proxies**	
5. On the "Manage Proxy" screen you will see the following:	**A. People who are proxy for you** section ➢ These are the people that can view/edit/and approve request for you. **B. Committees/Groups you are on** section ➢ These are the committees/groups you are on. <u>NOTE:</u> Your proxies will also be able to view/edit/approve for these groups on your behalf. **C. People you are proxy for** section ➢ These are the people you can view/edit/approve request for them. **D. Add/Update Proxy section** section ➢ This is where you can select employees that can act as proxy for you and what proxy access they have: 1. Approve • They can approve request on your behalf 2. Edit • They can update request information on your behalf but <u>NOT</u> approve. 3. View Only • They can view request that have been assigned to you.
6. To update the person(s) who can act as your proxy perform the following steps:	**A.** Select the person you want to add or edit in the **"Add/Update Proxy"** section. **B.** Select the level of access you want to grant. **C.** Click the "Submit" button. 

Continuation of step 6:

D. You will see the confirmation with a check mark informing you of your change and you will see the person's name under your "People who are proxy for you".

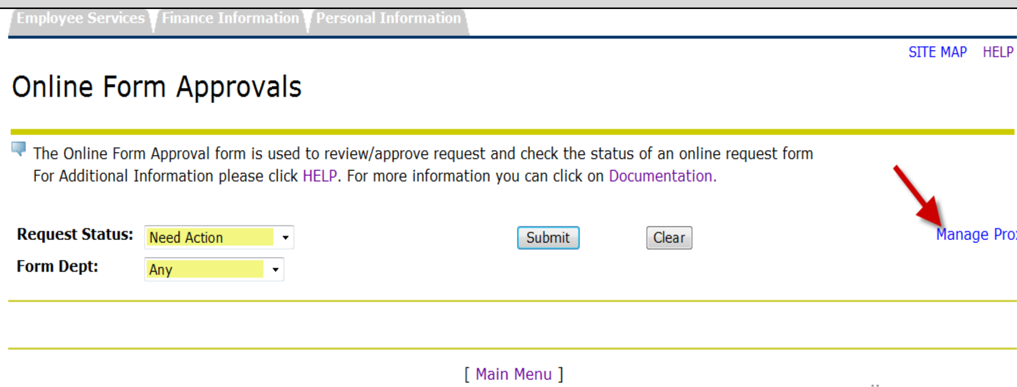


SECTION 6:
MANAGE GROUPS & COMMITTEES

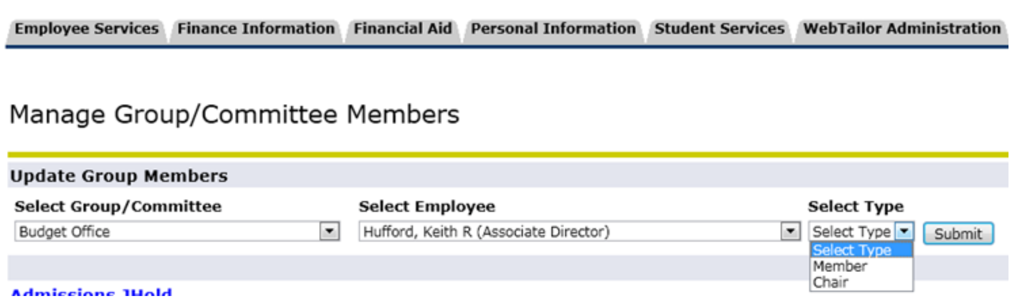
This section allows the **"Chair"** to see ALL Members within the group or committee.

STEPS TO MANAGE PROXY ACCESS

1. Log in to myWings under your **Staff** Tab
2. Under **My Applications**
3. Click **Online Form Approvals**
4. Click on the link **Manage Groups/Committees**
5. The Manage Group/Committee page will open and display all members.



6. Select the **group** you want to manage
7. Select the **employee** you want to add, change or remove
8. Select the **type** of member (i.e. Member or Chair)
9. Click the "Submit" button



NOTE: You will receive a confirmation message at the top of the page as seen below.

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