

# ONLINE FORM APPROVAL

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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

**SECTION 2:** Types of Request(s)

**SECTION 3:** Review and Approve Request(s)

**SECTION 4:** Check the Status of a Request

**SECTION 5:** Manage Proxy Access

**SECTION 6:** Manage Groups & Committees

## 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																	
<p>1. Review and make a decision on a request.</p>	<p>Online Form Workflows</p> <p>Request Status: <span>Need Action</span> <span>Submit</span> <span>Manage Proxies</span></p> <p>Form Dept: <span>Any</span> <span>Manage Groups/Committees</span></p> <p>Request(s) to Review: 1</p> <p>Recruit on a Vacant Line Request (Vacancy Pool)</p> <table border="1"> <thead> <tr> <th>Req</th> <th>Org Code</th> <th>Position No</th> <th>Position Title</th> <th>Action Needed</th> <th>Advise</th> <th>Action</th> <th>Proxy</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>200805</td> <td>342220</td> <td>Data Architect</td> <td>Requester Make Corrections</td> <td></td> <td>Correct</td> <td></td> </tr> </tbody> </table>	Req	Org Code	Position No	Position Title	Action Needed	Advise	Action	Proxy	1	200805	342220	Data Architect	Requester Make Corrections		Correct	
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1	200805	342220	Data Architect	Requester Make Corrections		Correct											
<p>2. Click the link under “Action” to select the request you want to review.</p>	<p>Online Form Approvals</p> <p>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 <a href="#">HELP</a>. For more information you can click on <a href="#">Documentation</a>.</p> <p>Request Status: <span>Need Action</span> <span>Submit</span> <span>Clear</span> <span>Manage Proxies</span></p> <p>Form Dept: <span>Any</span></p> <p>Request(s) to Review: 1</p> <p>Recruit on a Vacant Line Request (Vacancy Pool)</p> <table border="1"> <thead> <tr> <th>Req</th> <th>Org Code</th> <th>Position No</th> <th>Position Title</th> <th>Action Needed</th> <th>Advise</th> <th>Action</th> <th>Proxy</th> </tr> </thead> <tbody> <tr> <td>4</td> <td>200805</td> <td>342220</td> <td>Data Architect</td> <td>Department Director Approval</td> <td></td> <td>Review</td> <td></td> </tr> </tbody> </table>	Req	Org Code	Position No	Position Title	Action Needed	Advise	Action	Proxy	4	200805	342220	Data Architect	Department Director Approval		Review	
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<p>3. Select an “Action” at the bottom of the page</p>	<p>Select Action/Reason if requested. Then click the "Submit" Button.</p> <p>Action: <span>Select Action</span></p> <p>RELEASE: 6.2</p> <p> <span>Approve</span>  <span>Deny</span>  <span>Hold</span>  <span>Send Back</span>  <span>Redirect</span> </p>																
<p>4. Select “Send To”</p> <p><i>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.</i></p> <p><b>NOTE:</b> If the next step is a person (Not an Office or Department) then select the person.</p>	<p>Select Action/Reason if requested. Then click the "Submit" Button.</p> <p>Action: <span>Approve</span></p> <p>Send To: <span>Select Option</span></p> <p> <span>Select Option</span>  <span>Associate VP / Dean</span>  <span>Vice President</span> </p>																
<p>5. Enter Comments in one of the two places below</p> <ul style="list-style-type: none"> <li>• <b>Internal Notes</b> - 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.</li> <li>• <b>Communication Information</b> – Everyone in the workflow routing who touched the request can view these comments/notes.</li> </ul>	<p>Select Action/Reason if requested. Then click the "Submit" Button.</p> <p>Action: <span>Approve</span></p> <p>Send To: <span>Associate VP / Dean</span></p> <p><span>Select the Associate VP / Dean</span> <span>Select</span></p> <p>Internal Notes</p> <p>Communication Information</p> <p>[ Online Form Approvals ]</p> <p>RFI FASF: 6.2 <span>powered by</span></p>																
<p>6. Click the “Submit” button</p> <p>7. A system-generated email will be sent to the next group, committee or individual in the approval queue.</p>	<p>Select Action/Reason if requested. Then click the "Submit" Button</p> <p>Action: <span>Approve</span></p> <p>Send To: <span>Associate VP / Dean</span></p> <p><span>Smyth, Vince (Dir Auxiliary Svcs)</span></p> <p><span>Submit</span> Submit your request.</p> <p>Internal Notes</p> <p>Communication Information</p>																

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

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	<a href="#">View</a>

[ 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 Bill McSherry (Dir IT Enterprise Systems) Ext: 2844	<a href="#">View</a>

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

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

**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	<a href="#">View</a>
Pending	03/03/2014	3986	406003	356510	Athletic Ticket Mana	Vice President Approval	<a href="#">View</a>
Pending	03/03/2014	3985	300500	315650	Dir Alumni Svs	Vice President Approval	<a href="#">View</a>

## 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	
<ol style="list-style-type: none"> <li>1. Log in to <a href="#">myWings</a> under your <b>Staff Tab</b></li> <li>2. Under <b>My Applications</b></li> <li>3. Click <b>Online Form Approvals</b></li> <li>4. Click on the link <b>Manage Proxies</b></li> </ol>	
<ol style="list-style-type: none"> <li>5. On the “Manage Proxy” screen you will see the following:             <ol style="list-style-type: none"> <li><b>A. People who are proxy for you</b> <ul style="list-style-type: none"> <li>➤ These are the people that can view/edit/and approve request for you.</li> </ul> </li> <li><b>B. Committees/Groups you are on</b> <ul style="list-style-type: none"> <li>➤ These are the committees/groups you are on.</li> <li><b>NOTE:</b> Your proxies will also be able to view/edit/approve for these groups on your behalf.</li> </ul> </li> <li><b>C. People you are proxy for</b> <ul style="list-style-type: none"> <li>➤ These are the people you can view/edit/approve request for them.</li> </ul> </li> <li><b>D. Add/Update Proxy section</b> <ul style="list-style-type: none"> <li>➤ This is where you can select employees that can act as proxy for you and what proxy access they have:                             <ol style="list-style-type: none"> <li>1. Approve                                     <ul style="list-style-type: none"> <li>• They can approve request on your behalf</li> </ul> </li> <li>2. Edit                                     <ul style="list-style-type: none"> <li>• They can update request information on your behalf but <u>NOT</u> approve.</li> </ul> </li> <li>3. View Only                                     <ul style="list-style-type: none"> <li>• They can view request that have been assigned to you.</li> </ul> </li> </ol> </li> </ul> </li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li><b>A. People who are proxy for you</b> <ul style="list-style-type: none"> <li>➤ These are the people that can view/edit/and approve request for you.</li> </ul> </li> <li><b>B. Committees/Groups you are on</b> <ul style="list-style-type: none"> <li>➤ These are the committees/groups you are on.</li> <li><b>NOTE:</b> Your proxies will also be able to view/edit/approve for these groups on your behalf.</li> </ul> </li> <li><b>C. People you are proxy for</b> <ul style="list-style-type: none"> <li>➤ These are the people you can view/edit/approve request for them.</li> </ul> </li> <li><b>D. Add/Update Proxy section</b> <ul style="list-style-type: none"> <li>➤ This is where you can select employees that can act as proxy for you and what proxy access they have:                             <ol style="list-style-type: none"> <li>1. Approve                                     <ul style="list-style-type: none"> <li>• They can approve request on your behalf</li> </ul> </li> <li>2. Edit                                     <ul style="list-style-type: none"> <li>• They can update request information on your behalf but <u>NOT</u> approve.</li> </ul> </li> <li>3. View Only                                     <ul style="list-style-type: none"> <li>• They can view request that have been assigned to you.</li> </ul> </li> </ol> </li> </ul> </li> </ol>
<ol style="list-style-type: none"> <li>6. To update the person(s) who can act as your proxy perform the following steps:</li> </ol>	<ol style="list-style-type: none"> <li><b>A. Select the person you want to add or edit in the “Add/Update Proxy” section.</b></li> <li><b>B. Select the level of access you want to grant.</b></li> <li><b>C. Click the “Submit” button.</b></li> </ol>

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".

Employee Services Faculty Services Finance Information Personal Information

Manage Proxy Users

✓ Keith Hufford Approver access added.

People who are proxy for you		Committees/Groups you are on	
Person	Access	Committee	Position
Keith R Hufford (Associate Director)	Approver	Vacancy Pool Committee	Member

Add/Update Proxy

Person

People you are proxy for



Person

[ Online Form Approvals ]

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## SECTION 6: MANAGE GROUPS & COMMITTEES

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

STEPS TO MANAGE PROXY ACCESS	
<ol style="list-style-type: none"> <li>1. Log in to <u>myWings</u> under your <b>Staff Tab</b></li> <li>2. Under <b>My Applications</b></li> <li>3. Click <b>Online Form Approvals</b></li> <li>4. Click on the link <b>Manage Groups/Committees</b></li> <li>5. The Manage Group/Committee page will open and display all members.</li> </ol>	<p>Employee Services Finance Information Personal Information <span style="float: right;">SITE MAP HELP</span></p> <p style="text-align: center;">Online Form Approvals</p> <p>The Online Form Approval form is used to review/approve request and check the status of an online request form For Additional Information please click <a href="#">HELP</a>. For more information you can click on <a href="#">Documentation</a>.</p> <p>Request Status: <input type="text" value="Need Action"/> <input type="button" value="Submit"/> <input type="button" value="Clear"/></p> <p>Form Dept: <input type="text" value="Any"/></p> <p style="text-align: right;"><a href="#">Manage Prox</a> </p> <p style="text-align: center;">[ Main Menu ]</p>
<ol style="list-style-type: none"> <li>6. Select the <b>group</b> you want to manage</li> <li>7. Select the <b>employee</b> you want to add, change or remove</li> <li>8. Select the <b>type</b> of member (i.e. Member or Chair)</li> <li>9. Click the "Submit" button</li> </ol>	<p>Employee Services Finance Information Financial Aid Personal Information Student Services WebTailor Administration</p> <p style="text-align: center;">Manage Group/Committee Members</p> <p>Update Group Members</p> <p>Select Group/Committee <input type="text" value="Budget Office"/> Select Employee <input type="text" value="Hufford, Keith R (Associate Director)"/> Select Type <input type="text" value="Select Type"/></p> <p><input type="button" value="Submit"/></p> <p><b>Admissions Hold</b></p> <p><b>NOTE:</b> You will receive a confirmation message at the top of the page as seen below.</p> <p style="text-align: center;"> Keith Hufford has been added to Budget Office</p>

-----DOCUMENTATION END-----