How to Create a New Approval Workflow

To begin, navigate to the Admin tab. Locate Approval Workflows under the site data column. Then click Create New Approval Workflow from the blue bar.

Give your new workflow a name. Best practices strongly encourage giving your workflows and Areas matching names so the correct approval process is always selected.

If your site is part of a system, you will need to designate an Applicability Group. If you don’t see this option, don’t be alarmed. Not all sites will require this step.

Add users as Approvers to your steps by entering them into the search bar and clicking their name from the list. Accidentally added users can be removed by clicking the X beside their name.

By default, the first step in a new approval workflow is set to require the policy owner’s approval. This allows the same workflow to be used across multiple policies with different owners.It also ensures that the policy Owner is notified every time changes are made and the workflow restarts.

Additionally, as an option, a description can be added to each step to remind users of actions to take or describe the role of approvers, such as a committee.

Add steps and approvers as needed. You can preview the workflow at the bottom of the page to ensure everything is correct.

Click Create Flow when everything looks good.

The workflow can now be used.