

How to Create a New Approval Workflow Request

1. Log into the University's policy website: policies.unc.edu.
2. Click "Knowledge Base" in the menu bar along the top of the page:



The University of North Carolina at Chapel Hill Policies, Procedures and Standards

The policies, procedures and standards of the [University of North Carolina at Chapel Hill](#) are maintained in the [Policy](#). To find a policy, procedure, or standard, you may utilize the search box above or browse policies by unit.

If you have any questions or concerns about a specific policy, please reach out to the Responsible Unit document. If you have general UNC-Chapel Hill policy questions, please contact the Office of Ethics at [ethics@unc.edu](#).

3. Click "Services" in the menu bar along the top of the page:

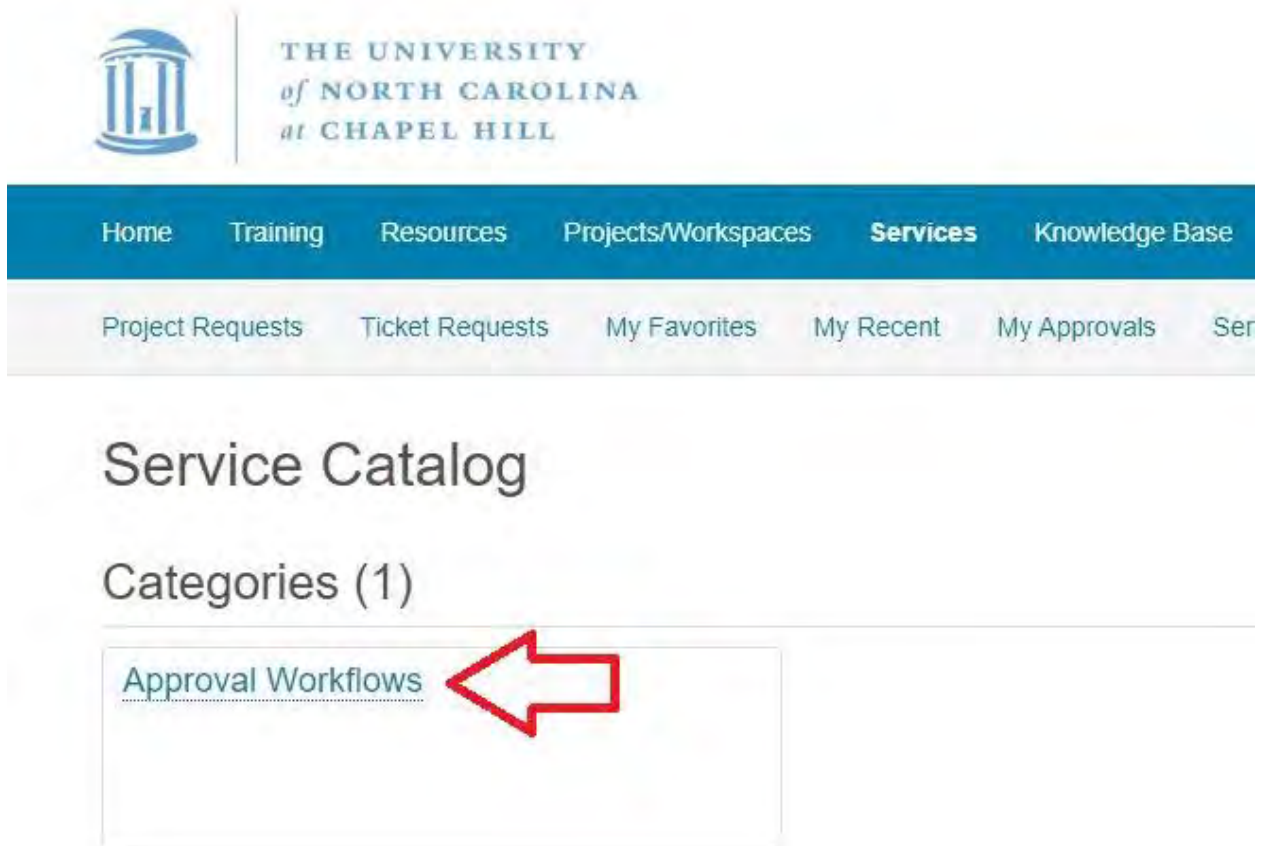


Knowledge Base

Categories (18)

How to Create a New Approval Workflow Request

- Click the “Approval Workflows” link under “Service Catalog.”



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Service Catalog

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[Approval Workflows](#)

- Click the “Reviewing and Approving Policy Documents” link.



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Approval Workflows

Services (1)

[Reviewing and Approving Policy Documents](#)

This approval workflow is to document your Unit's review and approval of a policy document before that document is published. This workflow is intended for all Unit documents and for new or major edits to University documents.

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6. Click the green "Request Service" button in the menu on the right side of the page.
 - a. You may have other green buttons than those shown in this screenshot. You can ignore all options except "Request Service."

The screenshot shows the top navigation bar of the University of North Carolina at Chapel Hill client portal. The main navigation menu includes Home, Training, Resources, Projects/Workspaces, Services, Knowledge Base, Questions, and Reports. Below this, a secondary menu lists Project Requests, Ticket Requests, My Favorites, My Recent, My Approvals, Services A-Z, Categories, Permissions Audit, Templates, and Search. The breadcrumb trail reads: Service Catalog / Approval Workflows / Reviewing and Approving Policy Documents. The main heading is "Reviewing and Approving Policy Documents" with a "Feed (0)" section below it. A light blue message box states "No feed entries were found." To the right, a vertical menu of green buttons includes "Request Service" (highlighted with a red arrow), "Share", "Edit Service", and "Add to Favorites". A "Comment" button is also visible.

7. The system will load a form. Please complete the form using the prompts.

The screenshot shows the form for creating a new approval workflow request. The breadcrumb trail is: Service Catalog / Approval Workflows / Reviewing and Approving Policy Documents. The main heading is "Reviewing and Approving Policy Documents" with "+ Show Help" and "- Hide Help" options. A text box explains: "This approval workflow is to document your Unit's review and approval of a policy document before that document is published. This workflow is intended for all Unit documents and for new or major edits to University documents." The form contains the following fields:

- What is your name? *** (required, with help icon): A dropdown menu with "Matthew Teal" selected. Below it, a note says "Please enter your name if the system does not automatically populate it for you."
- Which School/Unit do you work for? *** (required, with help icon): A dropdown menu with "Ethics Integrity and Plcy Mgt" selected. Below it, a note says "Please enter the name of your academic school or administrative unit here if the system does not populate it for you."
- What is the policy document's name? *** (required, with help icon): A text input field with a note: "Please enter the name of the policy document."
- Who will be the document's Issuing Officer? *** (required, with help icon): A text input field with "Start typing..." and a note: "Please enter the policy document's Issuing Officer. The Issuing Officer is the Dean or Vice Chancellor that has the authority to issue the policy, or that person's designee."

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- Once you complete the form, click the “Request” button at the bottom of the page.

Document Reviewers

Please list who needs to review this document. You must list at least one person, and may list up to five people. Please contact Matthew Teal (mwteal@email.unc.edu) if you need to have more than five reviewers.

Note: You do **NOT** need to list the Issuing Officer as a Document Reviewer. The Issuing Officer will review and approve/reject the document once the Document Reviewers have reviewed the document.

Document Reviewer #1 *

Document Reviewer #2 (if applicable)

Document Reviewer #3 (if applicable)

Document Reviewer #4 (if applicable)

Document Reviewer #5 (if applicable)

- Congratulations! You will see a confirmation page saying you have successfully created an approval workflow request. You can click on the “View the ticket you just created” link to review your request.

 Request Created Successfully!

Service Request ID: 18310402

What do you want to do now?

[Create another request of this type](#)

[View the request you just created](#)

[View your ticket requests](#)



- Please contact the University Policy Analyst, Matthew Teal, if you have any trouble with this process or have any questions.
 - Email: mwteal@email.unc.edu