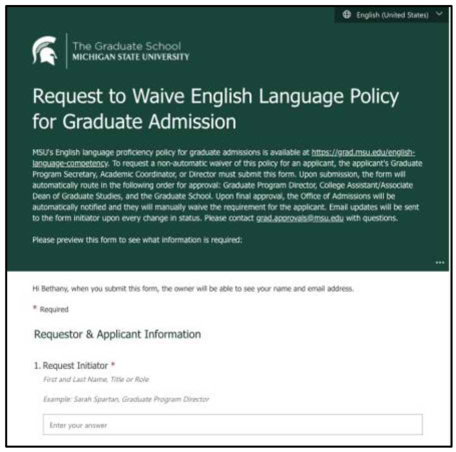
The Graduate School
MICHIGAN STATE UNIVERSITY

Job Aid

Digital Forms with Automated Routing



Screenshot 1: Example digital form from the Graduate School

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I can't see the entire form without filling it out. How do I know what information I will need to submit?

Each form contains a set of instructions at the top. Those instructions contain a link to the form preview, which will show you what you will need to provide. Note that the digital form may contain branching logic, and the form preview shows all branch options one after the other. You may not see all options from the preview when you complete the live form.

How do I submit an approval request?

1. **Head to the Graduate School's Forms page.**
2. Click the link to open the form you need. If you are not yet signed in with your MSU NetID credentials, you will be prompted to sign in. Note: Not all forms are digital forms.
3. Complete the digital form.
4. Click submit at the end.

Notes

- The digital form saves your progress as you go.
- You cannot start different instances of the same form. They will all open filled with the same information until one is submitted.
- Due to Microsoft Power Automate limitations, email addresses for approvers must be for an individual person (no shared inboxes) and must be in the format of NetID@msu.edu. See the form fields for details.

How do I track the status of an approval request?

There are two ways to track an approval's status.

1. If you submitted the original request through the form, then you can check your "Sent" list in Power Automate. Click a request to see who is currently reviewing it. You may want to bookmark your "Sent" list for easy access at any time. Your "Sent" list is also visible in your Approvals app in Teams.
2. If you are the form submitter, the (matriculated) student, or someone who's already approved the request, then will receive automatic email notifications whenever someone approves. That means the most recent email notification reflects the status of the form. Denial notifications are sent one level back, and the recipient is instructed to convey the decision to the appropriate people with a plan for next steps.

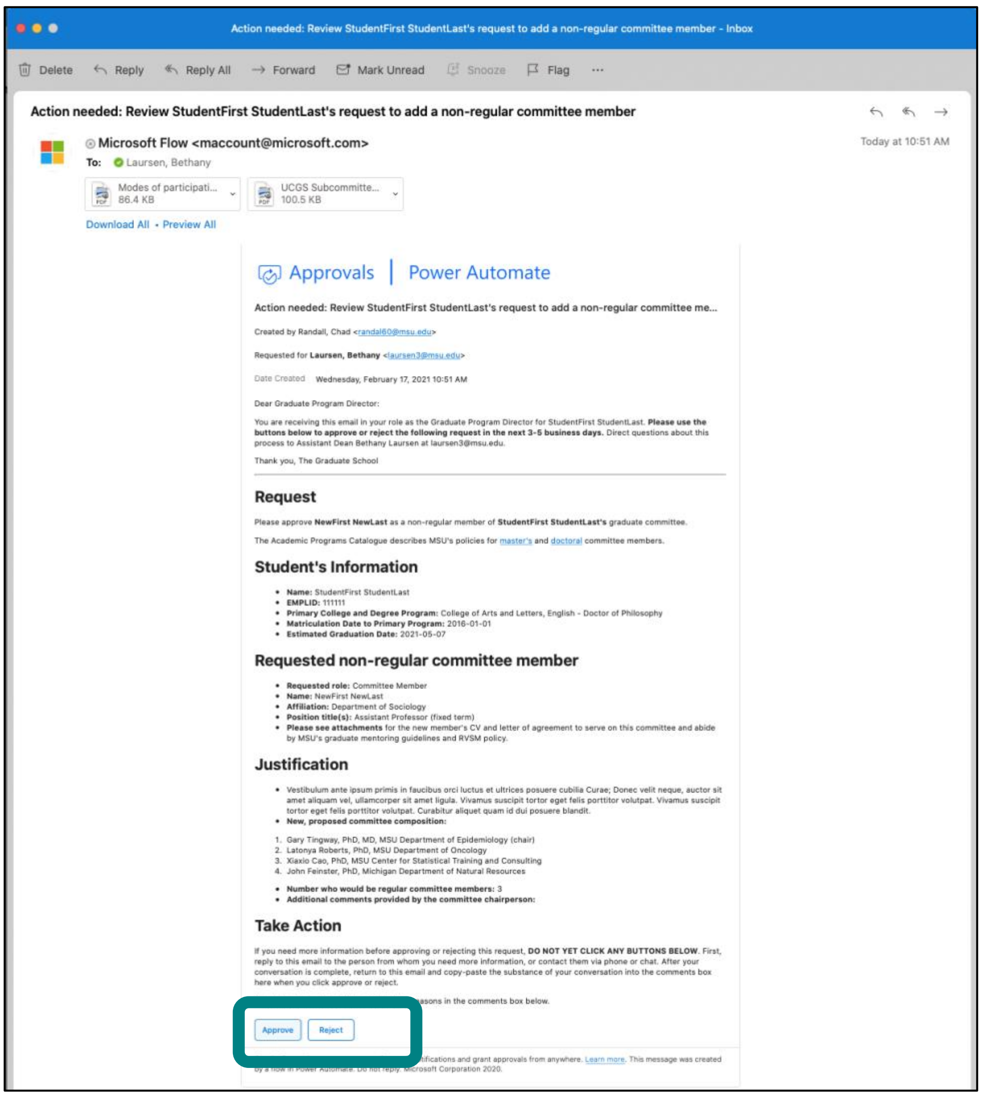
If you don't see anything in your "Sent" list and you haven't received any emails, please reach out to approvals@grd.msu.edu to check the status of your request.

As an approver, how do I act on the request?

How do I approve or deny a request?

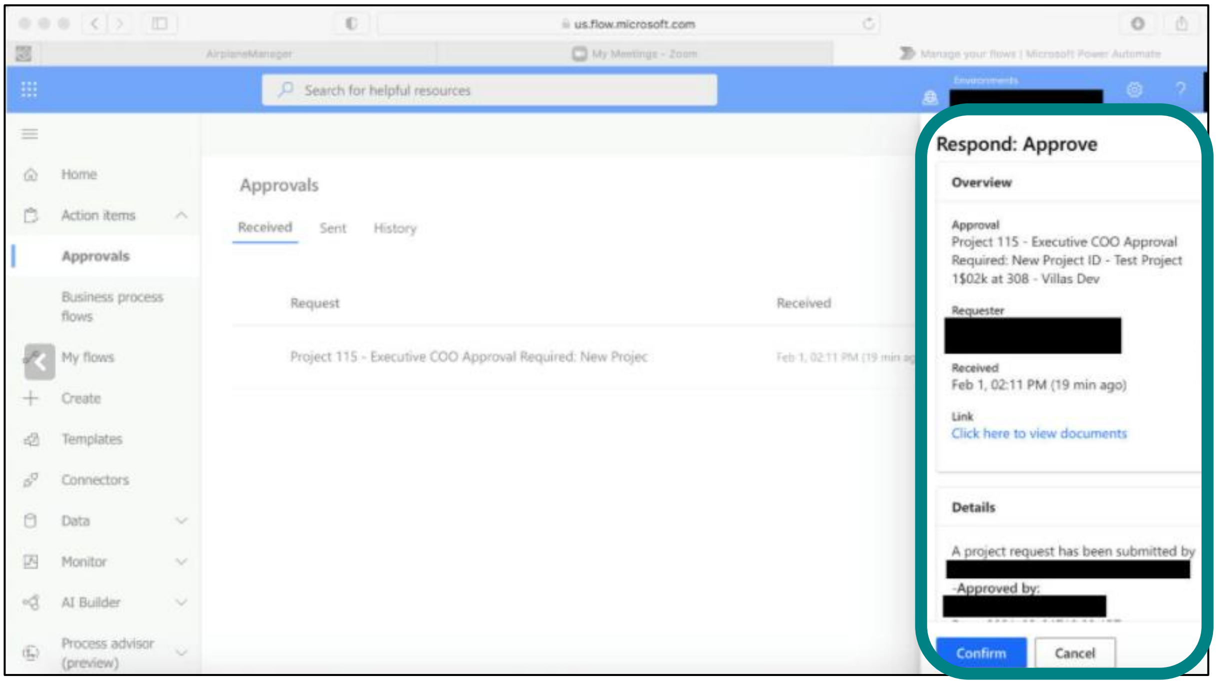
Email is easiest. You can approve/deny the approval in 3 possible locations: (1) Email, (2) Teams, and (3) the Power Automate app.

1. **Email (recommended).** As an approver, you will receive an approval email with all of the request information and any supplemental attachments, and at the bottom, there are two action buttons: Approve and Deny.
    a. If you view this email using Microsoft Outlook (web, mobile, or desktop), clicking the button in the email opens the optional comments box in the email itself and then completes the request directly (screenshot 2).



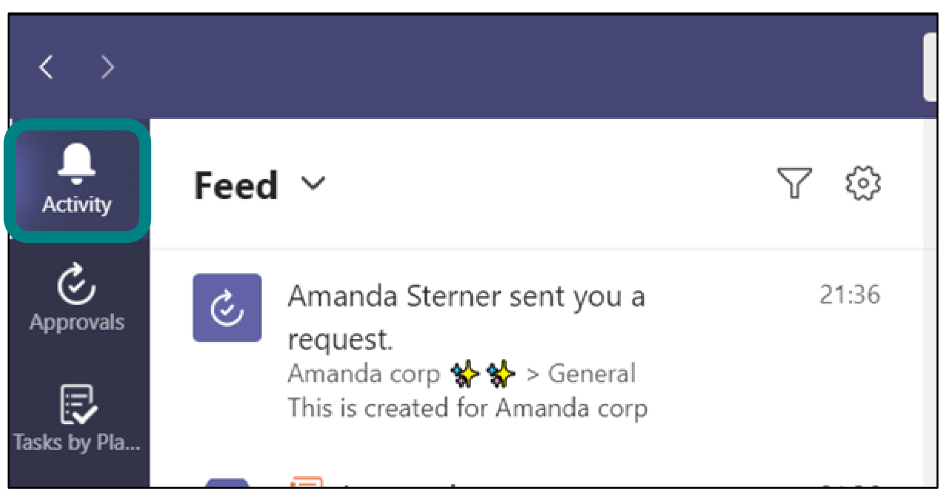
Screenshot 2: An approval request in Outlook with action buttons at the bottom.

b. If you view this email using any other email client besides Outlook, clicking the button in the email opens the request in your web browser. There, you can provide comments and then again click the button to complete your action (screenshot 3).



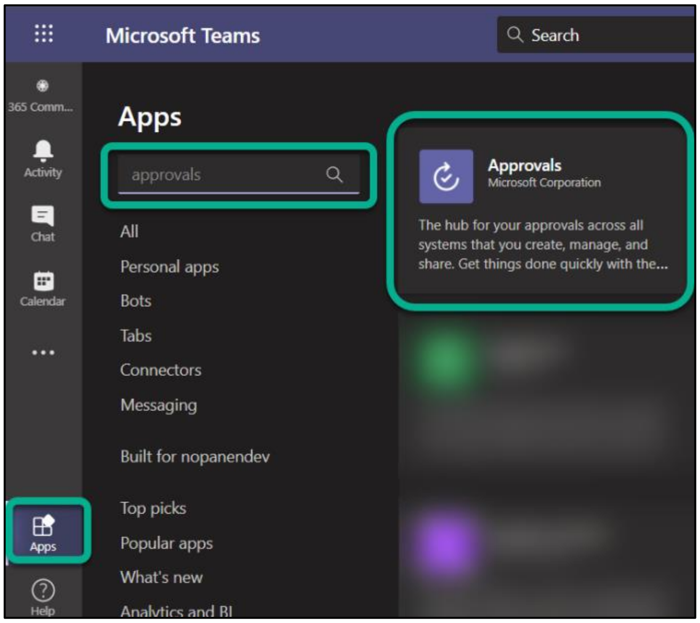
Screenshot 3: Approval in web browser. This is your "Received Action Items" list in Power Automate. You can also access your “Sent” and “History” lists here.

2. **Teams**. By default, Microsoft 365 sends approvals through both email and Teams. The approvals notification will appear in your Activity Feed, unless you have turned these off (see below) (screenshot 4).



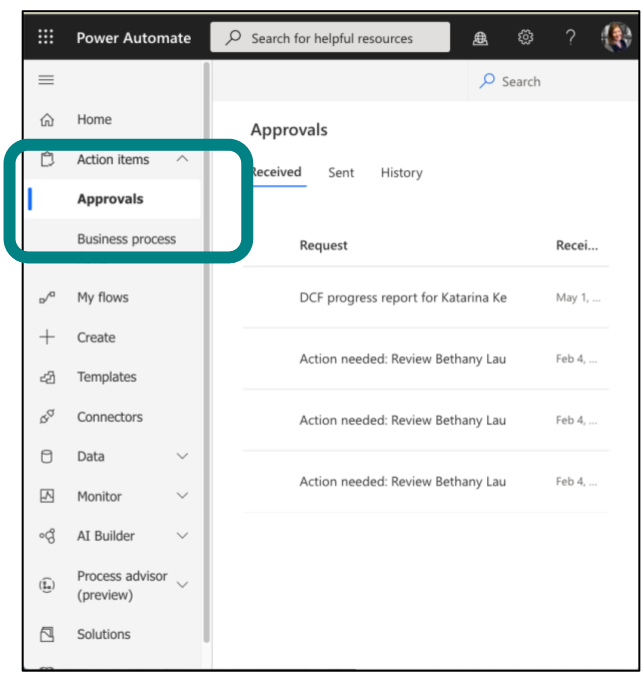
Screenshot 4: Approval notifications appear in Teams activity feed.

You can also see all of your approvals in Teams by opening [the Approvals app in Teams]() (accessed through the left-side menu; see screenshot 5).



Screenshot 5: Open the Approvals app in Teams.

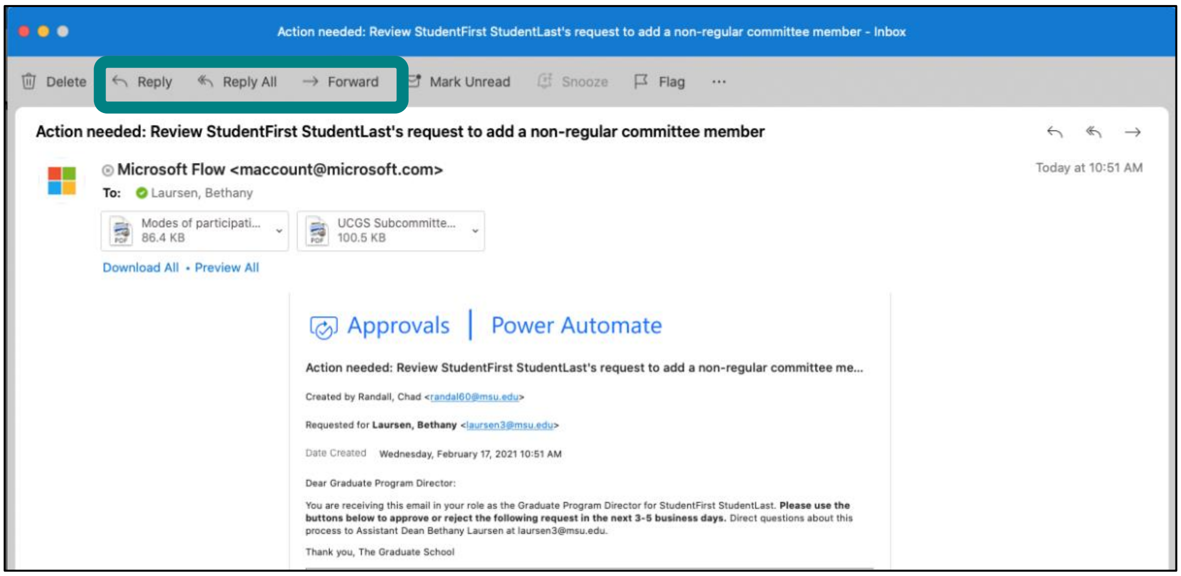
3. **Spartan 365 Power Automate**. Power Automate is the Microsoft Office 365 app that handles the automatic routing and approvals. You can find your "Received" approvals list in Power Automate under "Action Items" in the left-hand menu (screenshot 6). Tip: bookmark this link for easy access at any time.



Screenshot 6: Approvals "action items" in Power Automate on the web.

I need more information from someone before I make my approval decision. What do I do?

Just send an email. When viewing the approval request via email (see above), you can do email things with it like reply and forward. If you need more information from someone before making your approval decision, you can first hit reply or forward, then enter the email address of the person(s) you need to contact, and then hold an email conversation about the request or set up a meeting to discuss it further (screenshot 7).



Screenshot 7: An approval request in Outlook, where you can treat it like a normal email.

When you're ready to make your decision, **go back to the original email** (or find the approval in your Teams or Power Automate apps, see above) and click the appropriate button.

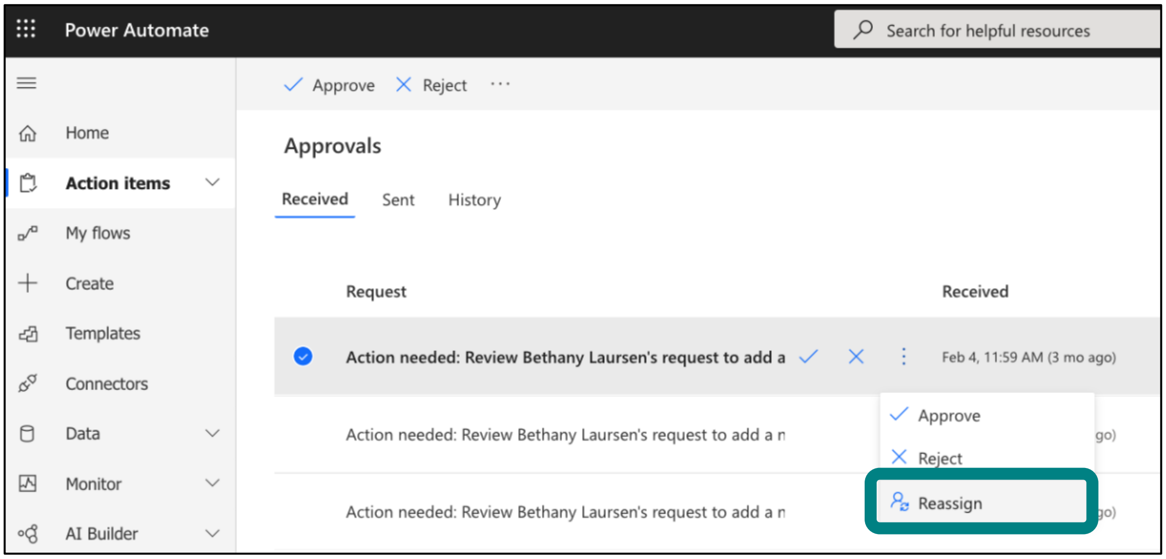
Note:

> The approval action buttons are links that are **unique to you,** so no one else will be able to click on the buttons in your email thread and complete the request for you. Only you can do it. This gives security but also means you cannot re-assign an approval request just by forwarding it to someone via email.

I'm not the right person to approve this. How do I give it to the right person?

If you received the approval request in error, e.g., you are not the graduate program director, **the request must be "reassigned" to someone else for it to be completed**; you cannot just forward the approval email.

1. First, you need to find the request in your list of approvals in Power Automate (see above, or from the approval email, you can click "Power Automate").
2. Second, click the three dots on a request in the list to open the extra menu of options, and click "reassign" (screenshot 8).



Screenshot 8: The reassign option in your list of approval requests.

3. Third, enter the [NetID@msu.edu]() email of the person who should approve this request. Done! [See Microsoft instructions]() for more detail.

I thought this was an email thing. Why am I getting these approval notifications in Teams?

By default, Microsoft 365 sends approvals through both email and Teams. To turn off the notifications in Teams, [follow these Microsoft instructions]().

How can I see a list of all requests I've ever approved?

Visit [your "History" list in Power Automate.]() Tip: Bookmark this link for easy access at any time. Your "History" list is also in your Approvals app in Teams.

I read this job aid and I'm still stuck!

Ask the Graduate School for technical assistance. If you get completely stuck with the technology and are unsure of how to solve your problem, contact [Graduate School IT specialist Chad Randall]() with your question.

Ask the Graduate School for policy assistance. If you have questions about the approval policy itself (e.g., what information is required, who approves, when forms should be submitted), please contact [approvals@grd.msu.edu]().