

## Setting up Approval Workflows in Qualtrics

In today's workshop, we will highlight how to create approval workflows, i.e., person A submits a request, and it goes to Person B, who has the option to approve or deny the request. Perhaps your office could use this for a grade appeal process, to approve preliminary travel, or to request funds; regardless of the purpose, sometimes we need a process to keep track of approvals.

Like the features offered through DocuSign, Qualtrics workflows offer a handy way to send documents, engage in approvals, and notify all related parties of updates.

In today's example, we use a travel request (aka, someone requesting funds for travel). The basic flow is for one person to complete the first part of a survey requesting funds for travel, and then the person approving the request completes the second part of the same survey. Following completion of the first part of the survey, two emails will be triggered: An email with a link to the survey is sent to the approver letting them know a request has been made, and an email is also sent to the requestor letting them know the request has been received. Once the approver decides on the request (aka the second part of the survey), an email is sent to the requestor notifying them of the decision.

The basic steps for building this process include:

1. Build a survey for both the requestor and approver
2. Build a retake survey link
3. Create a workflow that sends an email to the submitter/requestor acknowledging receipt of the request and another email to the approver to request a decision.
4. Create a second workflow that notifies the submitter of the approval decision.

## Step 1

1. To begin, first create a new, blank survey.
2. Create a question block for the information you need from the requestor/submitter. I suggest you name this block “Requestor” to help you keep track of your survey flow. This block will need to ask for their name and email as well as the name and email of the person who will approve/disapprove their request. In this example, we have just one requestor and one approver, but you can add as many of them as you like; just be sure to add them to the email actions later.

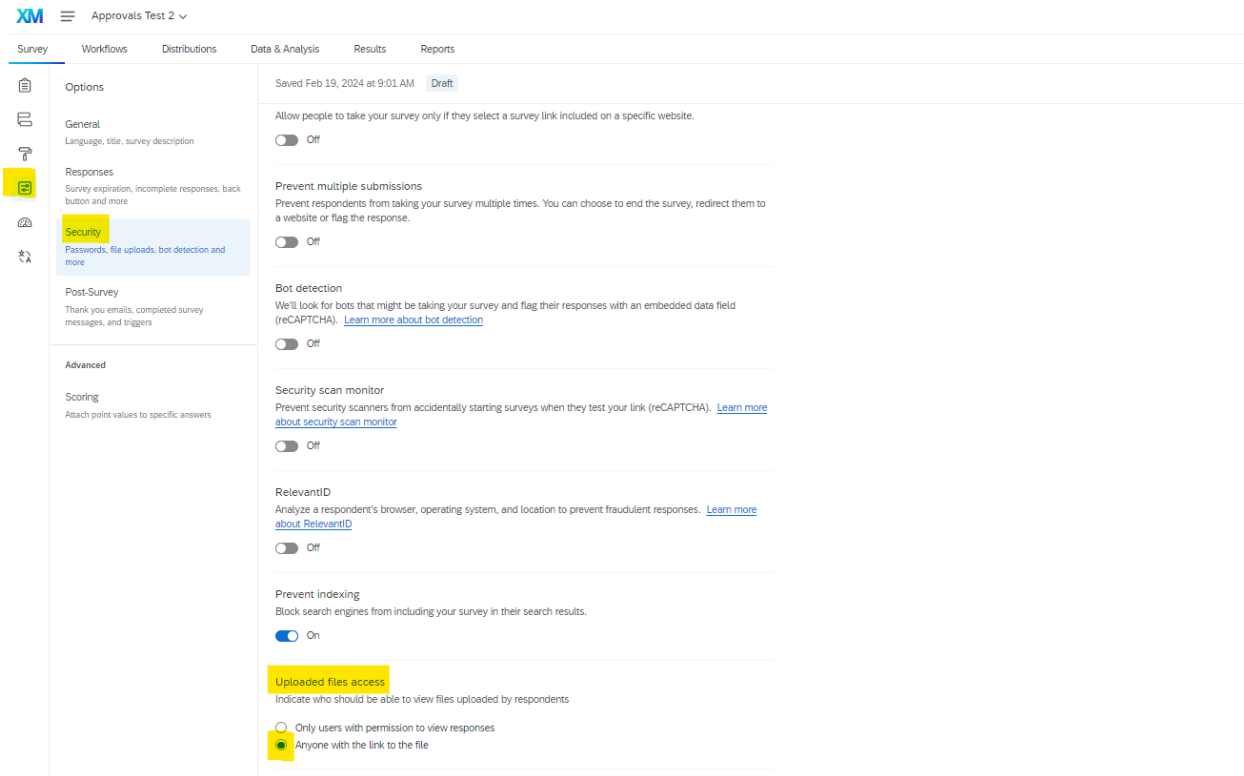
The screenshot shows a survey editor interface for an 'Approval Workflow'. At the top, there are navigation buttons: 'Tools', 'Saved Feb 19, 2024 at 9:01 AM', 'Draft', 'Preview', and 'Publish'. On the right side, there is a search icon and an 'ExpertReview score' indicator showing 'Great'. The main content area is titled 'Approval Workflow' and contains four question blocks:

- Q1:** A text block with the instruction 'This page is to be filled out by the requestor'.
- Q2:** A form titled 'Requestor Contact Information' with two input fields labeled 'Name' and 'Email'.
- Q3:** A form titled 'Supervisor Contact Information' with two input fields labeled 'Name' and 'Email'.
- Q4:** A file upload question titled 'Upload the request form' with a 'Choose File' button and the text 'No file chosen'.

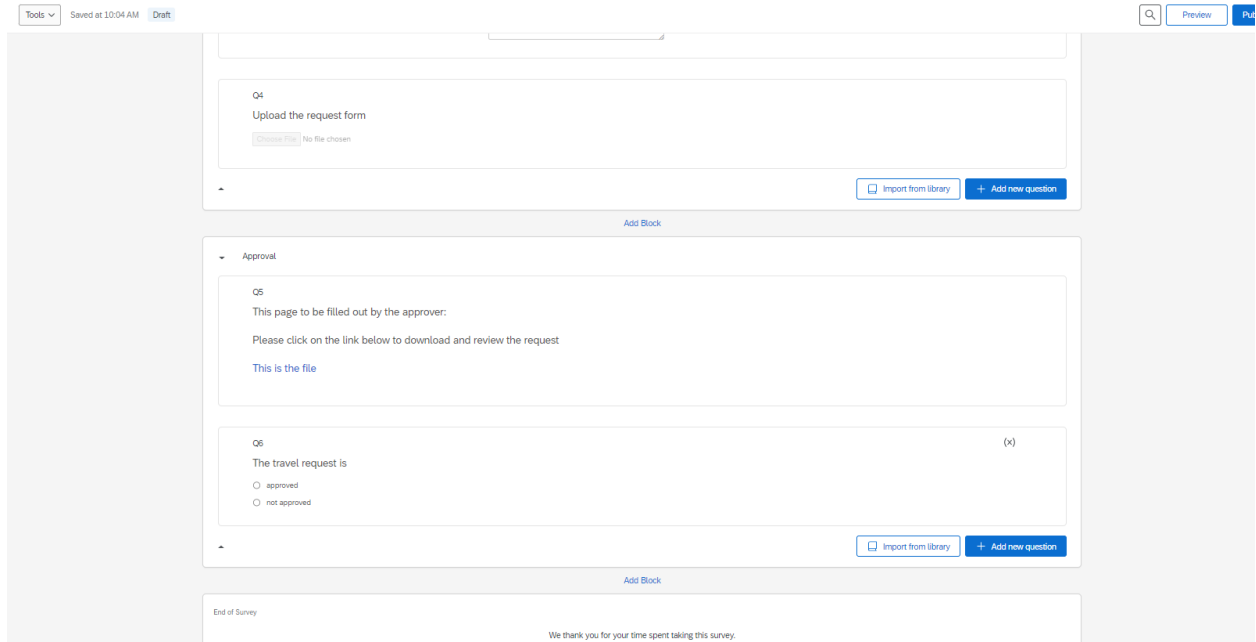
At the bottom right of the question blocks, there are two buttons: 'Import from library' and '+ Add new question'.

- a. You can add other questions as necessary; here we simply ask for a request form that has already been completed using a File Upload question.

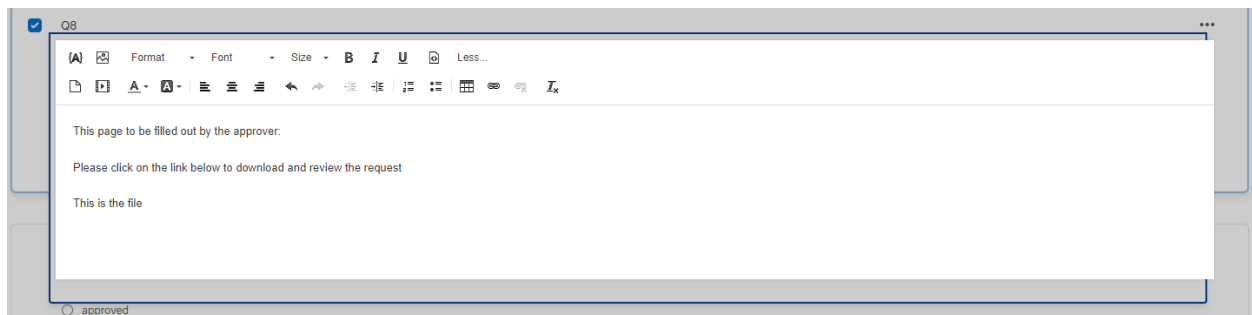
- Next, go to survey options (the fourth icon down on the left-hand side toolbar) and go to “Security.” Under “Uploaded Files Access,” activate “Anyone with the link to the file.”



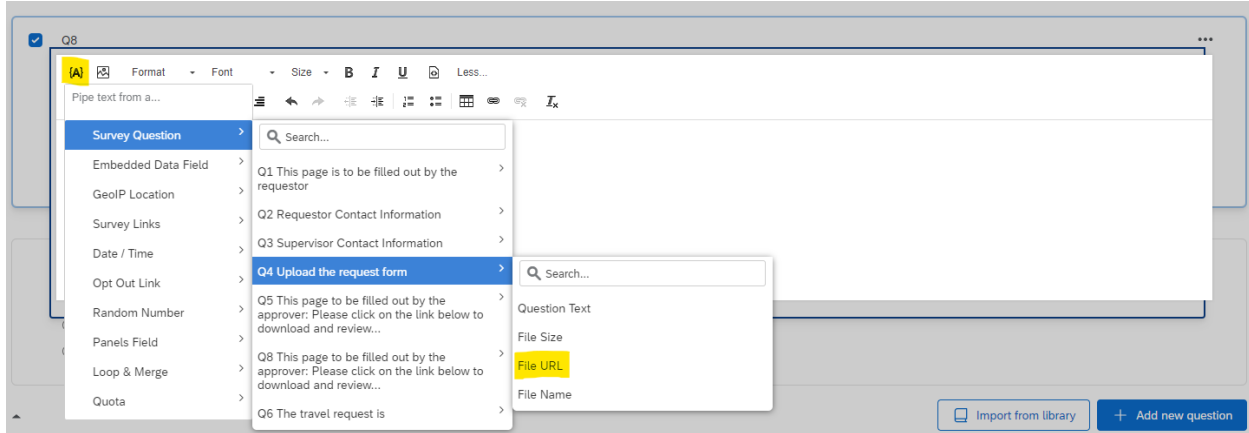
- In a new block named “Approval,” add the questions you will ask the person who will approve the request.



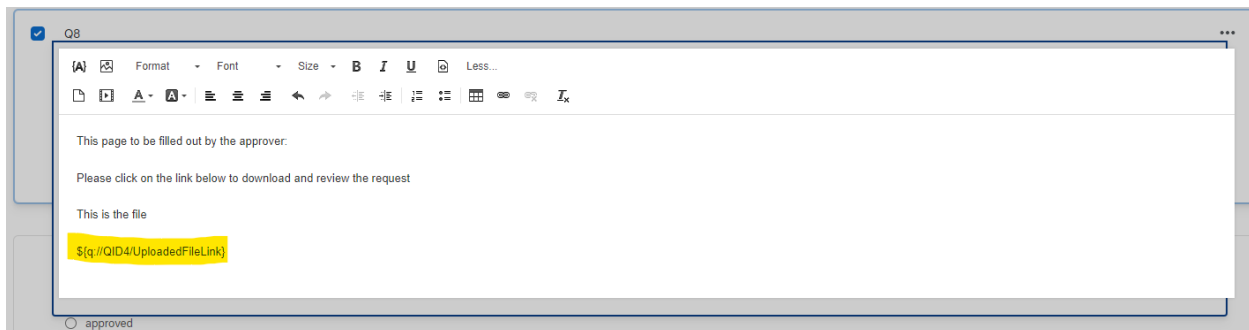
5. Question 5 is a Text/Graphic type question. The hyperlink is to the file uploaded by the requestor. You use the Rich Content Editor and piped text features to build the file link. See the additional steps below
  - a. First, click on the question and open the Rich Content Editor. Enter the text you want and the text for the download link (see steps a-e below).



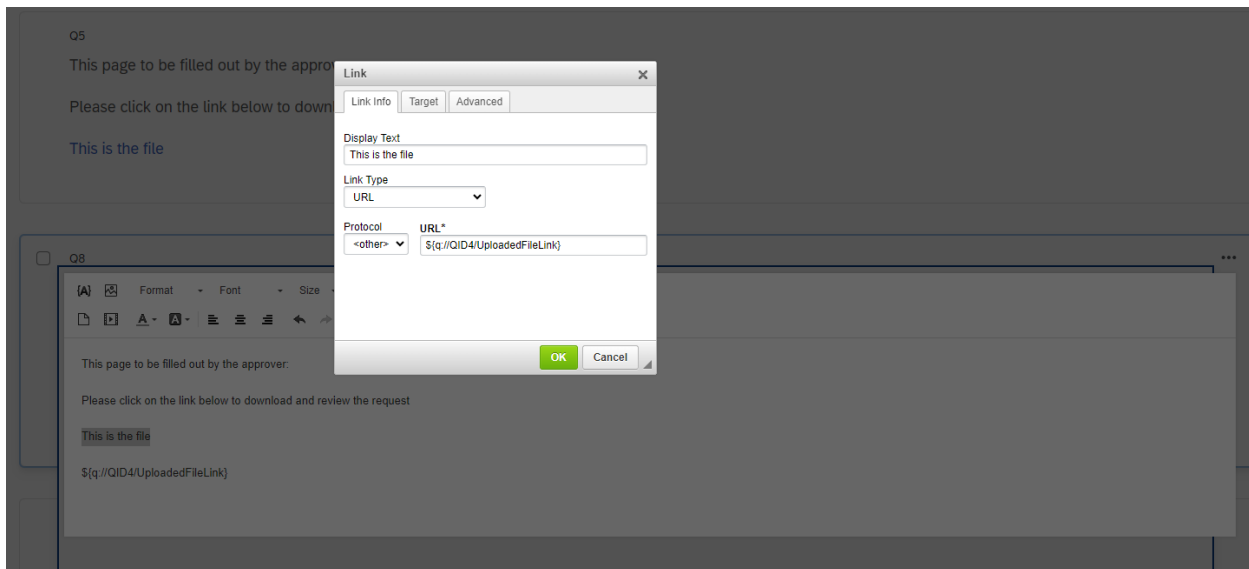
- b. Next, click on the piped text icon and find the URL for the file (Survey Question > Q4 Upload the request form > File URL:



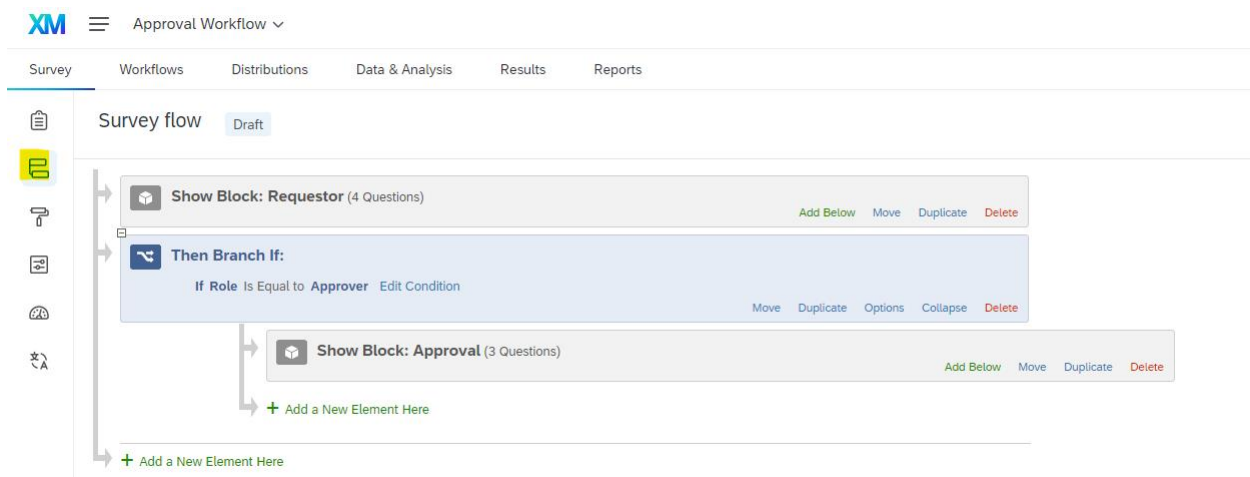
c. It should produce the following code:



- d. Highlight and copy the code produced (yellow code highlighted above).
- e. Then, highlight the text you want to use for the link, and click on the Link icon (looks like a chain). Paste the link code into the URL box and change the Protocol to "Other." Click OK. Delete the link code in the body of the question and click outside the question box to close the Rich Content Editor.



6. Finally, we add the actual approval question: Q6: *The travel request is:* (Multiple choice question; answers are “approved” or “denied”).
7. Before we move to developing our survey flow, go ahead and publish the survey.
  - a. Publish survey is the blue button on the top left of your survey builder screen.
8. Once our survey is built, we need to create a Survey Flow to make sure only the Approver sees the Approval Block.
  - a. Click on Survey Flow (the second icon from the top, on the left-hand toolbar).
  - b. Click the green “Add Below” link to add a branch below the first block.
  - c. Add the condition in the Branch using embedded data.
    - i. We will set the embedded data variable “Role” using a URL in a later step.
  - d. Finally, move the Approval Block under the branch and hit the blue “Apply” button on the bottom right hand of the screen. It should look like this:



## Step 2 & 3

Next, we need to build the Retake Survey Link, which enables the Approver to make their decision using the same survey form as the Requestor, rather than a new one. The link will be emailed to the Approver. In this same step, we will create the workflow that will email the Requestor and Approver.

- e. First, click on the Distributions tab at the top left, of your screen
- f. Click the Anonymous Link. Copy and paste the Anonymous Link into notepad or a blank Word document.
- g. [https://uttyler.az1.qualtrics.com/jfe/form/SV\\_4Jb6XorLSc3JFPg](https://uttyler.az1.qualtrics.com/jfe/form/SV_4Jb6XorLSc3JFPg)

Pause response collection

- Distribution summary
- Anonymous link
- Emails
- Personal links
- Text message (SMS)
- Access codes
- Social media

### Get an anonymous survey link

Paste this reusable link into emails or onto a website; it can't be tracked, and can't be used to identify respondents

[https://uttyler.az1.qualtrics.com/jfe/form/SV\\_bJdvRLKF25GxUiy](https://uttyler.az1.qualtrics.com/jfe/form/SV_bJdvRLKF25GxUiy)

Read-only

Copy survey link

h. Next, click on "Workflows" tab on the top left, then click "Create a Workflow"

## Welcome to workflows

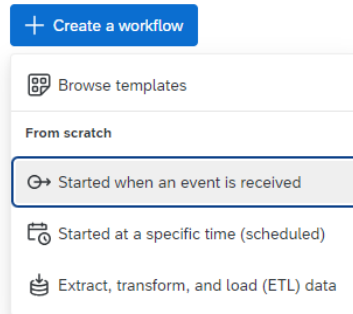
Manage all the workflows in your project. Create your first workflow to learn about all the ways Qualtrics can automate tasks.

+ Create a workflow

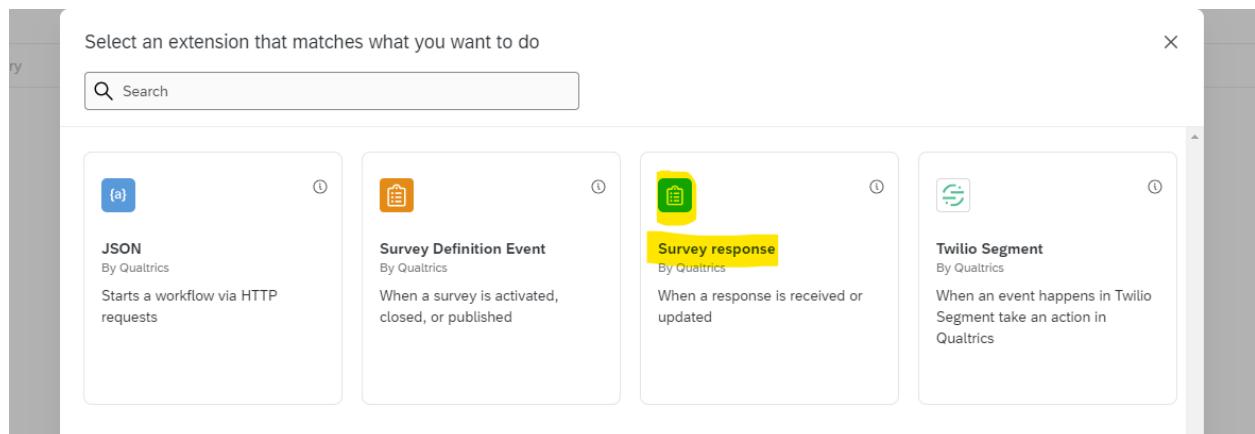
i. Choose "Started when an event is received"

## Welcome to workflows

Manage all the workflows in your project. Create your first workflow to learn about all the ways Qualtrics can automate tasks.



- j. Then click "Survey Response" because we want the workflow to begin when we receive a survey response and then click "Finish."





**Survey response**

What do you want to look for?

Newly created responses

Responses updated via the [Qualtrics API](#)

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Additional response types

Include imported responses

Include incomplete responses

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Select what language to receive response data in

Keep the language the response was received in

Resolve translations into another language  
Note: written responses by the respondent won't be translated

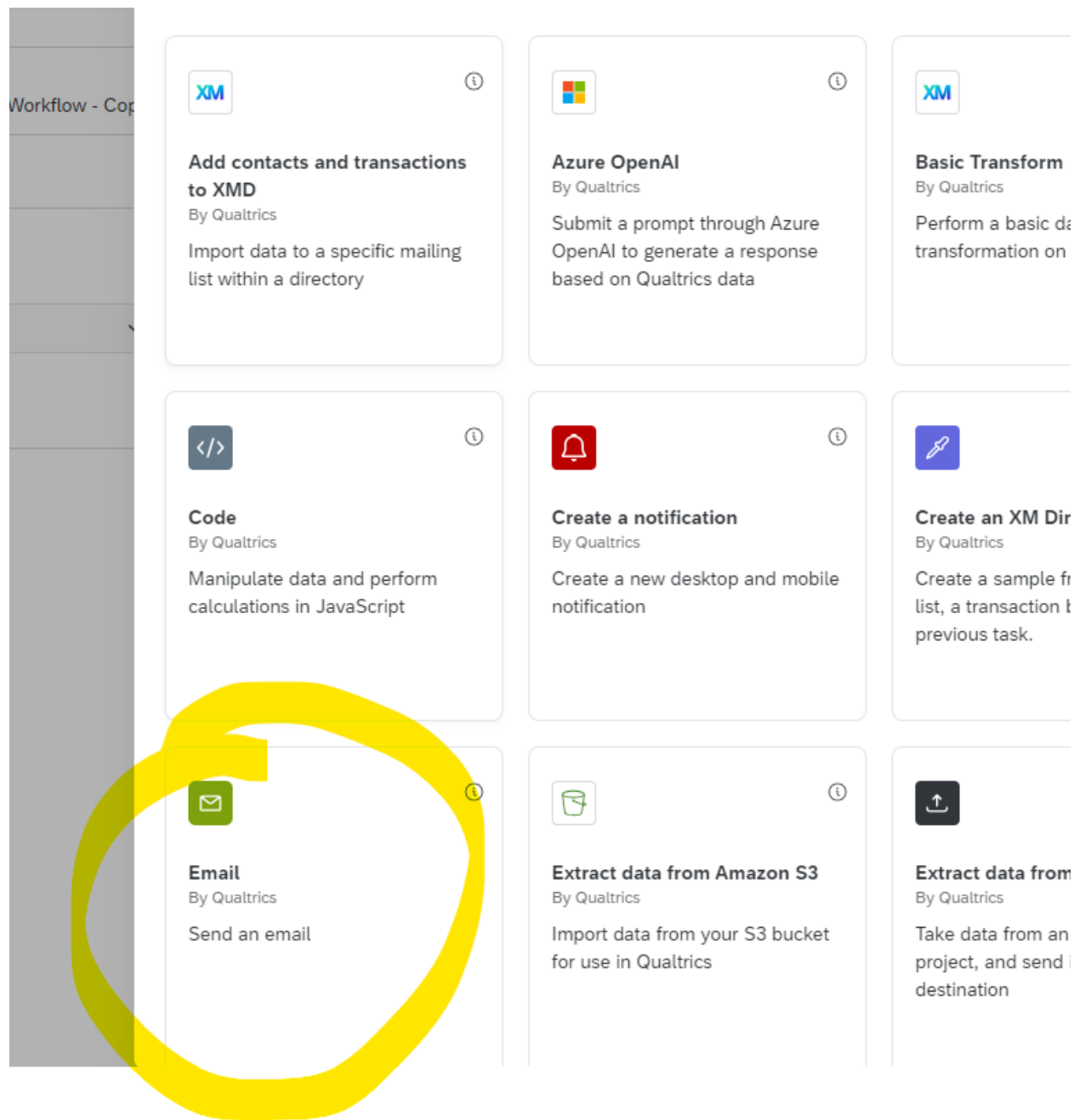
[← Back](#) [Cancel](#) [Finish](#)

Next, we create the conditions to determine if/when the emails should be sent. We have two emails we want to send at this point of the approval workflow. The first email goes to the supervisor, indicating that a new request has been made and requesting their review. The second email is to the person who filled out the form, telling them their submission has been received.

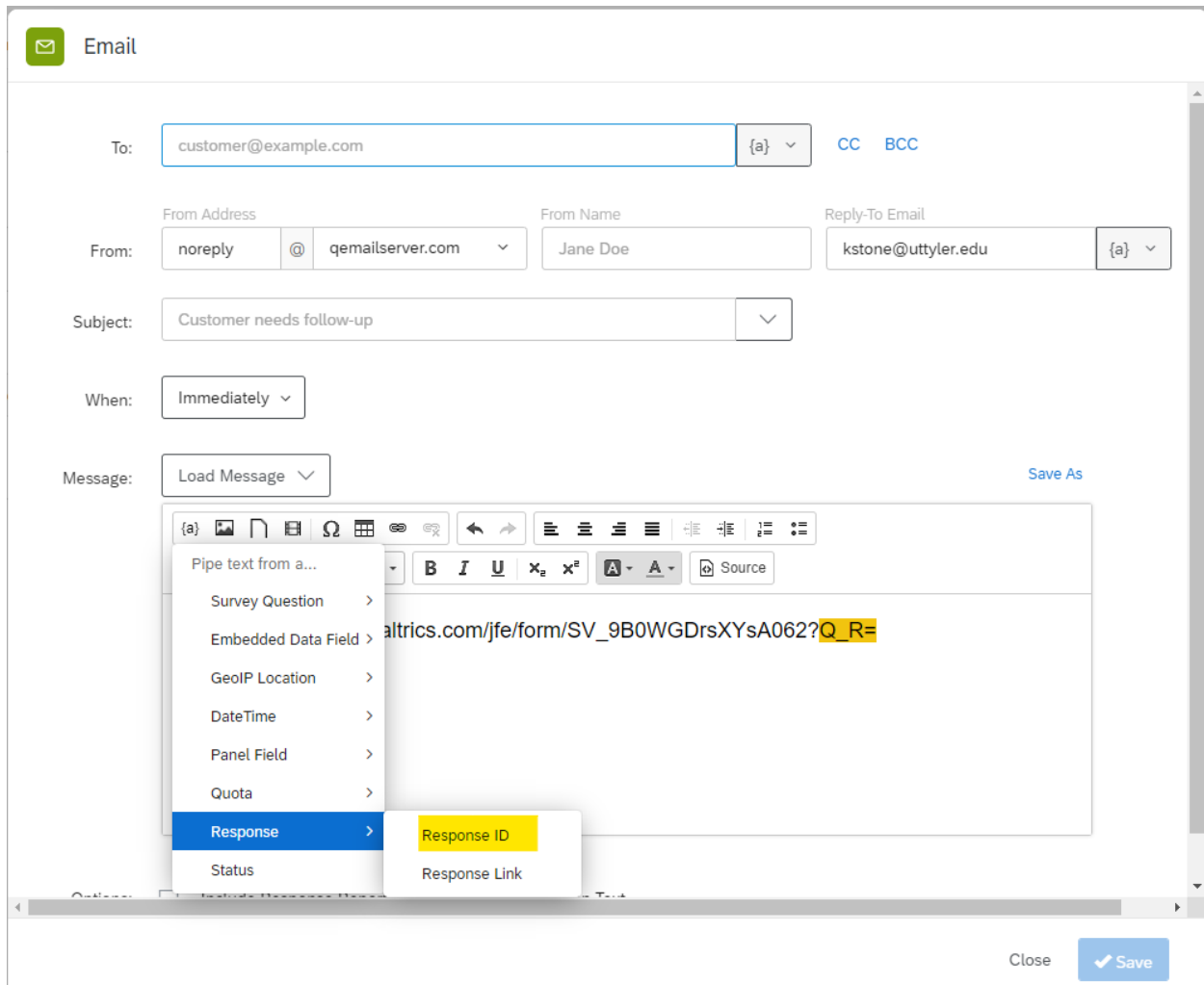
1. First label your workflow in the top left-hand corner. I suggest naming it "First Workflow."
2. The conditions should be as follows: Click the plus sign (+) then click "Add a condition." >All of the following are true > Embedded Data > Type in "Role" > Doesn't equal > type in "Approver" (see image below)

The screenshot shows a workflow editor interface. At the top, there is a navigation bar with the following tabs: "Workflow editor" (which is underlined), "Run history", "Revision history", "Sharing and permissions", and "Settings". Below the navigation bar, there is a task card titled "Survey response" with a subtext "A response was created for Approval Workflow - Copy". Below the task card, there is a plus sign (+) indicating an expandable section. This section contains a condition configuration panel. The panel has a dropdown menu set to "All of the following are true" and a three-dot menu icon. Below this, there are four input fields: "Embedded Data" (with a dropdown arrow), "Role" (with a dropdown arrow), "doesn't equal" (with a dropdown arrow), and "Approver" (with a three-dot menu icon). At the bottom of the panel, there are two buttons: "Save condition" (highlighted in blue) and "Cancel". Below the panel, there is another plus sign (+).

3. Click "Save Condition"
4. Click on the (+) under the condition we just created and click "Add Task," and select "Email."



5. We are going to create/write our first email. This email will be sent to the supervisor/approver and asks them to review the request and then either approve or deny it. Here are the steps:
  - a. Paste the copied anonymous survey link into the body of the email. Write in “?Q\_R=” to the end of the URL.
  - b. Place the cursor directly after the “=” and click the piped text icon and add the ResponseID to the end of the URL (it should be: `{rm://Field/ResponseID}`)



- c. Now add "**&Q\_R\_DEL=1**" to the end of the URL. This will add the Approver's responses to the original data rather than creating a new record.
- d. Finally, add "**&Role=Approver**"
  - i. This is your Retake Survey Link (highlighted below)

6. Now we can write the rest of the email. This email will go to the Approver.
  - a. In the “To:” section, insert piped text for the supervisor’s email (Q3 in our example).
  - b. Adjust the “From address”, “From name”, and “Reply-to email” to fit the specific needs of your office area/request.
  - c. Write in an email subject line. For this exercise, I suggest “A new travel request has been submitted for your review.”
  - d. As the final component, complete the body of the email with whatever text you need without deleting the hyperlink. I suggest: (Note: the <> indicate piped text):


*Dear <Name>,*

*<Name of requestor> has made a travel request. Please click on the link below to access the request and approve or deny the request. The question to approve is found on the second page.*

*Thank you,*



- Now we need to finish creating the Action, by including one last email. In the workflow home page, click the (+) below the email icon and click “Add a Task.”
- Select Email, then edit the email as you did above, except this email will be sent to the Requestor to acknowledge receipt of the request so be sure to change the “From”, “To”: and “Subject” fields accordingly. See below for an example:
  - Click save when you are finished.

 Email

To:  {a} v CC BCC  
Enter up to 30 email addresses, each separated by a comma.

From Address:  @  v







































From Name:


Reply-To Email:  {a} v

Subject:  v

When:  v

Message:  v Save As

{a}                                        

 **Survey response**  
A response was created or updated for Approval Workflow


+

All of the following are true

Embedded Data Role equals Approver

[Edit condition](#)

2. "Save" the condition
3. Under the condition, click on the (+) and add a task. Click "Email"
4. Create an email and fill all the fields as the above email that goes to the Requestor. In the body of the message, you can use piped text to inform the email recipient of the decision.
  - a. *Dear <name of requestor>, <Name of supervisor> has <answer choice> your travel request. You may proceed forward. Thanks.*

 **Email**

To:  {a} ▾ CC BCC  
Enter up to 30 email addresses, each separated by a comma.

From Address:  @  ▾







































From Name:





























Reply-To Email:  {a} ▾

Subject:  ▾

When:  ▾

Message:  ▾ [Save As](#)

{a}                                      

Font ▾ Size ▾ **B** *I* U                              



Congrats! Your Travel Request workflow is now complete! Hit publish again and try it out via the Preview feature.

You can view the responses and access any uploaded files by going to the Data & Analysis page and double-clicking on a record. There will be a link to the uploaded file in the pop-up window.

Please note that Gmail, Yahoo, and Hotmail email addresses often block emails sent from the Qualtrics mailer so please only use @uttyler or @patriots.uttyler.edu email addresses.

Thank you!

Please don't hesitate to contact me with any questions, concerns, or updates to this workflow:

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