



Introduce yourself in the chat! Which institution are you representing?

Approval and Notifications

Kelsey Seale

Thursday, December 18, 2025

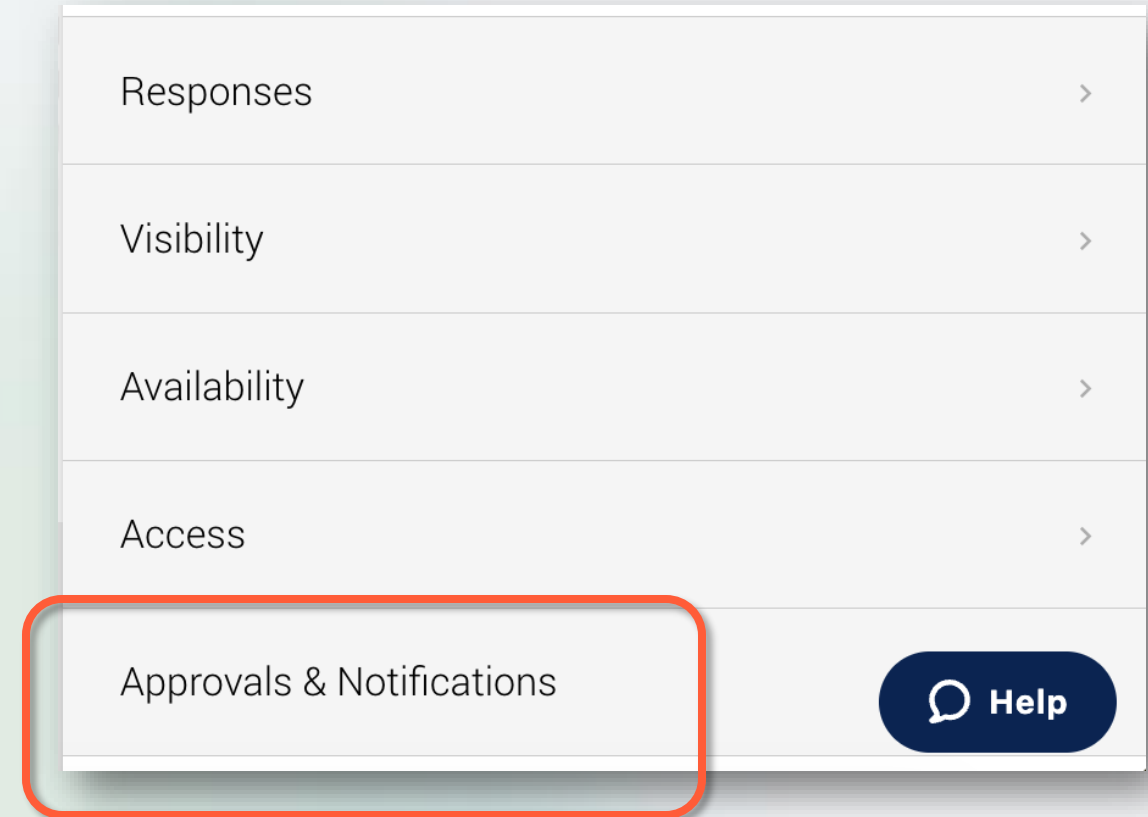
Agenda

1. Approve vs. Notify
2. Ordered vs. Unordered
3. Who gets the email?
4. Conditional Logic
5. FAQs
6. Q&A
7. Close

Approval and Notifications

Approvals & Notifications Form Setting

- You can set approvals and notifications for any form
- Found in the “Settings” tab
- Scroll to the bottom



Approve vs. Notify

Approve vs. Notify

Approve

- Forms require additional attention.
- Forms need to be checked.
- Forms that create content.

Notify

- Forms require additional attention.
- Forms need to be checked.
- Forms that create content.

Ordered vs. Unordered

Ordered vs. Unordered

Ordered

- Emails are sent in a chain
- Once Sophie approves, THEN Nate can approve

Unordered

- Emails are sent all at once
- Either Sophie OR Nate can approve first

< Approvals

ORDERED ▾

ADD STAGE

1

What

User

Users

Caton, Sofia

should

Action

Approve

LOGIC

MESSAGE

CAN EDIT

2

What

User

Users

Cavan, Kent

should

Action

Approve

LOGIC

MESSAGE

CAN EDIT

3

What

User

Users

Cavnor, Nate

should

Action

Approve

LOGIC

MESSAGE

CAN EDIT

< Approvals

UNORDERED ▼

ADD STAGE

1

What Users Action

User ▲ Caton, Sof ▲ should Approve ▲ LOGIC MESSAGE CAN EDIT

1

What Users Action

User ▲ Cavan, Ke ▲ should Approve ▲ LOGIC MESSAGE CAN EDIT

1

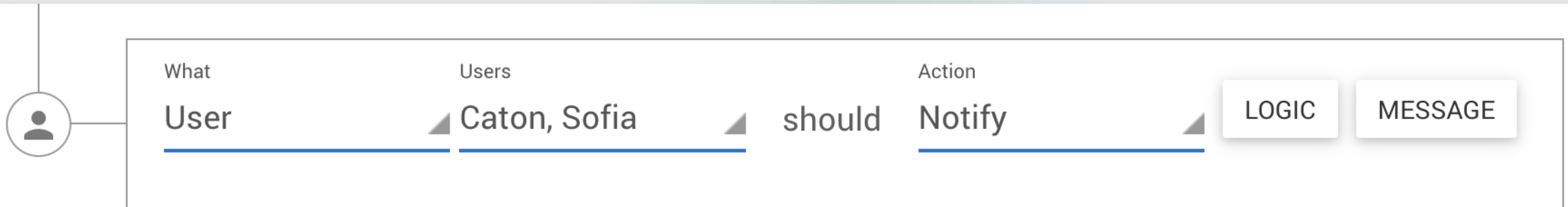
What Users Action

User ▲ Cavnor, Ni ▲ should Approve ▲ LOGIC MESSAGE CAN EDIT

Who gets the email?

Who gets the email? **User**

- You get to choose the exact person
- Note for APPROVE – this is the most restrictive!



A user selection interface showing a search for a user to notify. On the left is a person icon. The main area is a horizontal box with three columns: 'What', 'Users', and 'Action'. Below these columns are three dropdown menus. The first dropdown is labeled 'User' and is underlined. The second dropdown is labeled 'Caton, Sofia' and is also underlined. The third dropdown is labeled 'Notify' and is underlined. To the right of the dropdowns are two buttons: 'LOGIC' and 'MESSAGE'.

What	Users	Action
<u>User</u>	<u>Caton, Sofia</u>	<u>Notify</u>

LOGIC MESSAGE

Who gets the email? **Role**

- Less restrictive
- Choose a role type instead of a specific person

< Approvals

ORDERED ▾

ADD STAGE



What

Role

Roles

▲ Campus Admini ▼

should

Action

Approve ▼

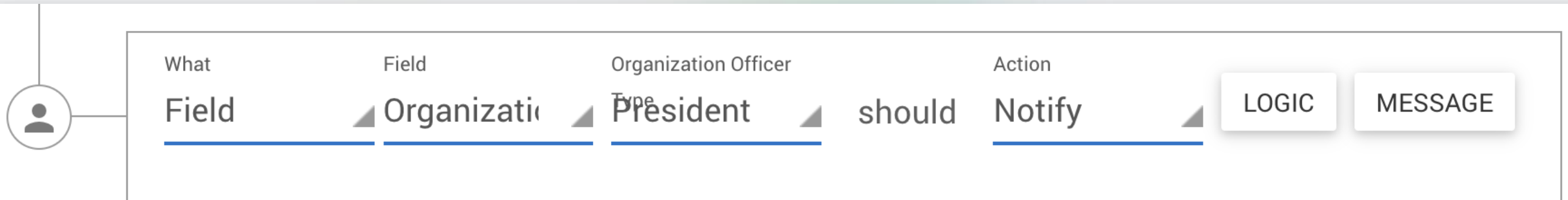
LOGIC

MESSAGE

Who gets the email? **Field**

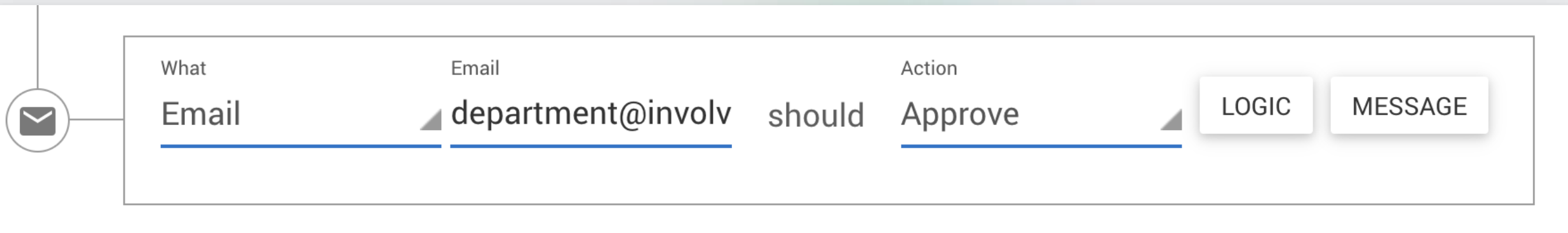
For use with Org Widget or Email Field

- Email = Directly to the email provided
- Org Widget = Select the officer type




Who gets the email? **Email**

- Use for people who are not users in Involve



Use someone's Name whenever possible.

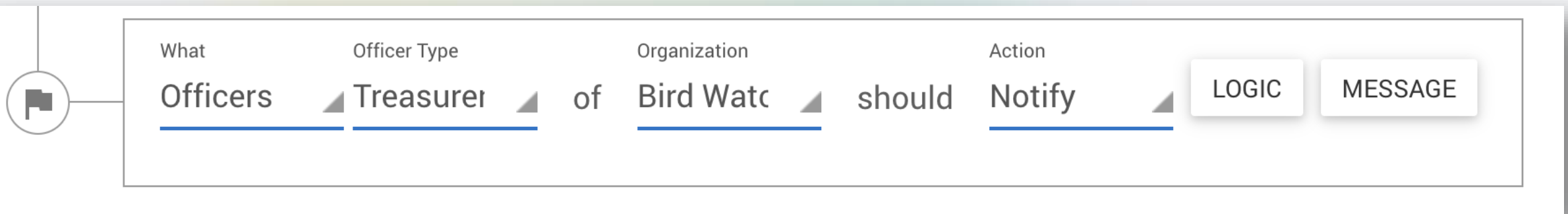
- If user exists in your platform, use their name rather than their email in the approval process.
- The email stage is intended for people who don't have accounts (e.g. the off-campus fire dept needs to approve events over a certain number of people).



What	Email		Action		
<u>Email</u>	<u>department@involv</u>	should	<u>Approve</u>	LOGIC	MESSAGE

Who gets the email? **Officers**

- Must select a specific organization
- Can be sent to any officer type
- Send all funding requests to the Student Government Treasurer!
- Send all print requests to the Printing Club President



What Officer Type Organization Action

Officers Treasurer of Bird Watc should Notify LOGIC MESSAGE

Customize your email.

Custom Email Message

- Provide additional details, information, or context in the approval / notification email

The screenshot shows an email interface. At the top, the subject is "Event Registration needs your approval". The sender is "Modern Campus Involve - Do Not Reply" with the email address "hello@presen...". The recipient is "kseale+8002520@moderncampus.com". There is a PDF attachment named "cpr-certification-cla..." with a size of 562.2 KB. Below the attachment are links for "Download All" and "Preview All". A placeholder for the "Modern Campus Involve Logo" is shown. The main body of the email contains the text: "A new response for Event Registration needs your approval". A yellow rounded rectangle highlights a custom message: "Make sure to check the calendar before approving events! Let the organizer know if they need to update either the time, date, or location". At the bottom, there is a purple button labeled "Review Response & Take Action".

Event Registration needs your approval

MC Modern Campus Involve - Do Not Reply <hello@presen...> Today at 2:09

To: kseale+8002520@moderncampus.com

cpr-certification-cla... 562.2 KB

Download All • Preview All

Modern Campus Involve Logo

A new response for Event Registration needs your approval

Make sure to check the calendar before approving events! Let the organizer know if they need to update either the time, date, or location

Review Response & Take Action

Adding conditional logic.

Conditional Logic

- You can decide specific conditions under which a form needs to be approved or notified
- Your event has food? Notify campus catering.
- Your event will have more than 30 people? Notify campus security.
- The feedback is below a 6/10? Send to Jane.

Any vs. All

- Any

- Any of these conditions will trigger the email
- All conditions do NOT need to be met
- Least restrictive

- All

- Email goes out only when all conditions are met
- Most restrictive

All - Conditional Logic

- Campus animal control should be notified if there will be animals **AND** it's on campus.

What
Email

Email
animalcontrol@cu.edu

should

Action
Notify

LOGIC MESSAGE

Conditional Logic

All of the following match. ADD

Target	Field	Operators	Options
Field	Will your event have any of the following	Is	Animals
Field	Is your event on or off campus?	Is	On Campus

[Add additional logic](#)

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Any – Conditional Logic

- Rick needs to know about **ANY** events tagged "Cricket Points" **OR** tagged "Service."

What
User

Users
Christal, Rick

Action
should Notify

LOGIC MESSAGE

Conditional Logic —

Any ▾ of the following match. ADD

Target	Field	Operators	Tags Options
<u>Field</u>	<u>Tags - Tags</u>	<u>Is</u>	<u>Cricket Points</u>

Target	Field	Operators	Tags Options
<u>Field</u>	<u>Tags - Tags</u>	<u>Is</u>	<u>Service</u>

[Add additional logic](#)

“ADD” vs. “Add additional logic”

< Approvals UNORDERED ▾ ADD STAGE

What: Field Field: Basic Informatio Organization Officer Type: Advisor Action: should Approve LOGIC MESSAGE CAN EDIT

Conditional Logic

All of the following match. ADD

Target	Field	Operators	Categories
Field	Basic Information - Host	Is In Category	Academic
Target	Field	Operators	Tags Options
Field	Tags - Tags	Is	Career

Add additional logic

Can edit

Can Edit

< Approvals

ORDERED ▾

ADD STAGE

What	Roles	Action	
<u>Role</u>	<u>Campus Adm</u>	<u>should Approve</u>	LOGIC MESSAGE CAN EDIT
Conditional Logic			+
Notification Message			+



Can Edit

- Form must require login
- Form must have “Allow Revisions” turned on

← Approvals ORDERED ▾ ADD STAG

What	Roles	Action	
Role	Campus Adi	should Approve	LOGIC MESSAGE CAN EDIT
Conditional Logic			+
Notification Message			+

Details >

Form Name
New Form

Form Description

Category

Status
Active

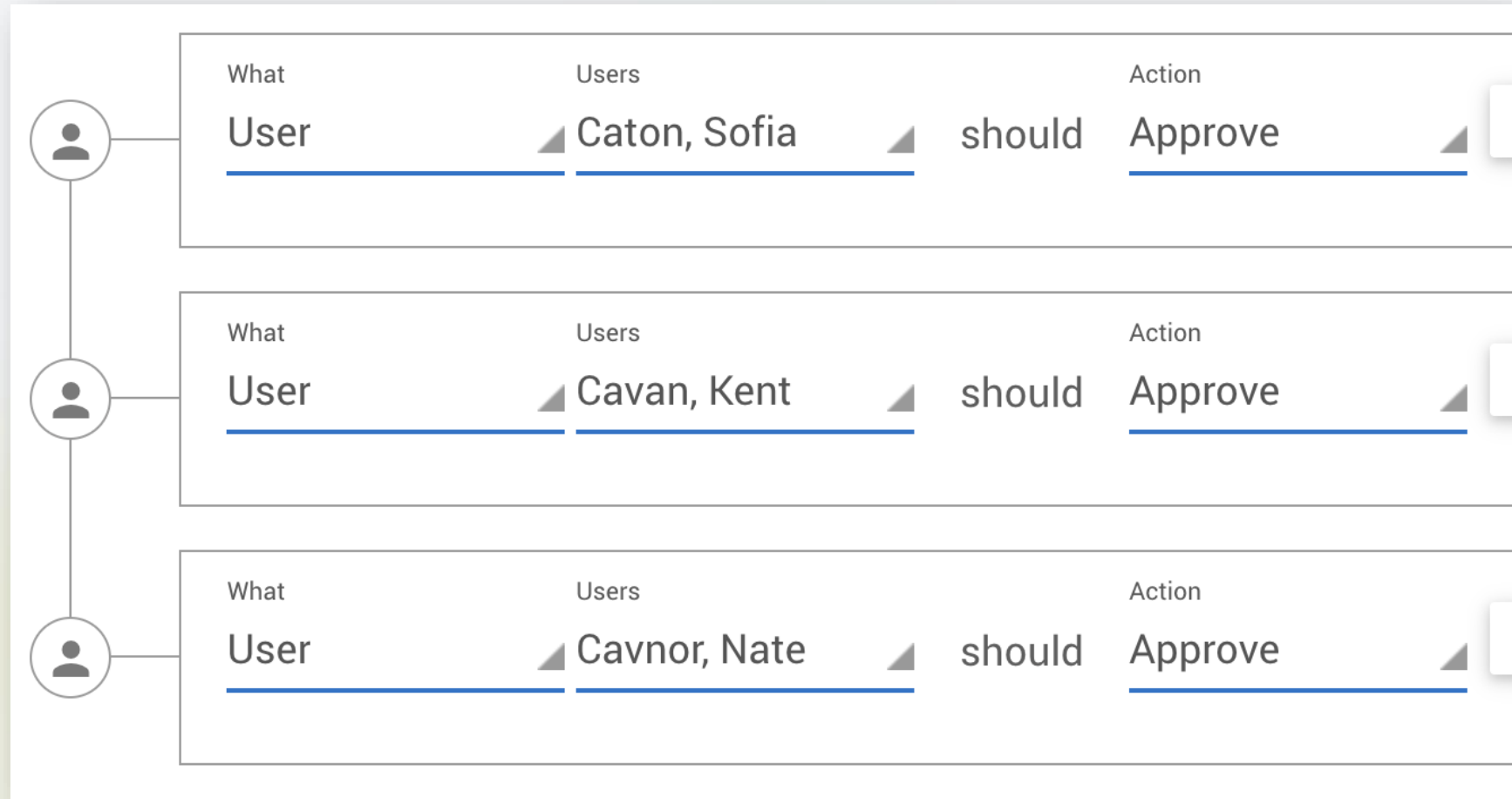
Allows Revisions

Lock Revisions After Approval

FAQs

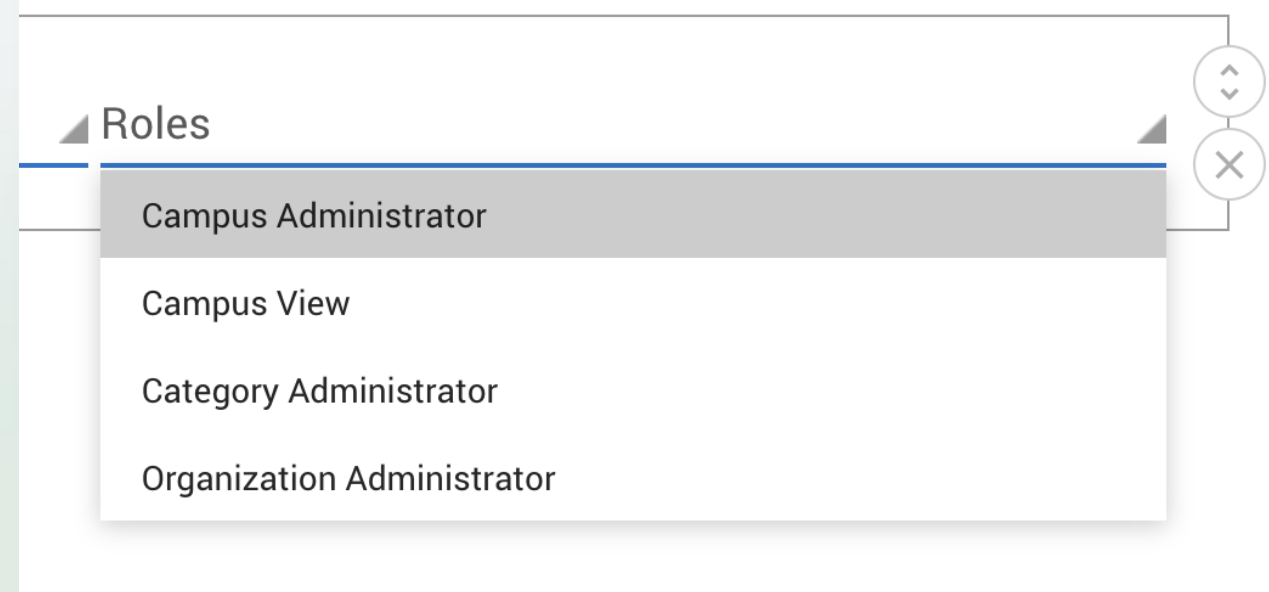
Can we require approvals from multiple users?

- Yes!



Can require approval from either one person OR the other?

- No
- You can require approval from a certain user TYPE (ie an account admin)



I'm a campus admin, can I approve this form on behalf of someone else?

- Regardless of your admin status, you will need edit or higher access to approve the form!

← Access

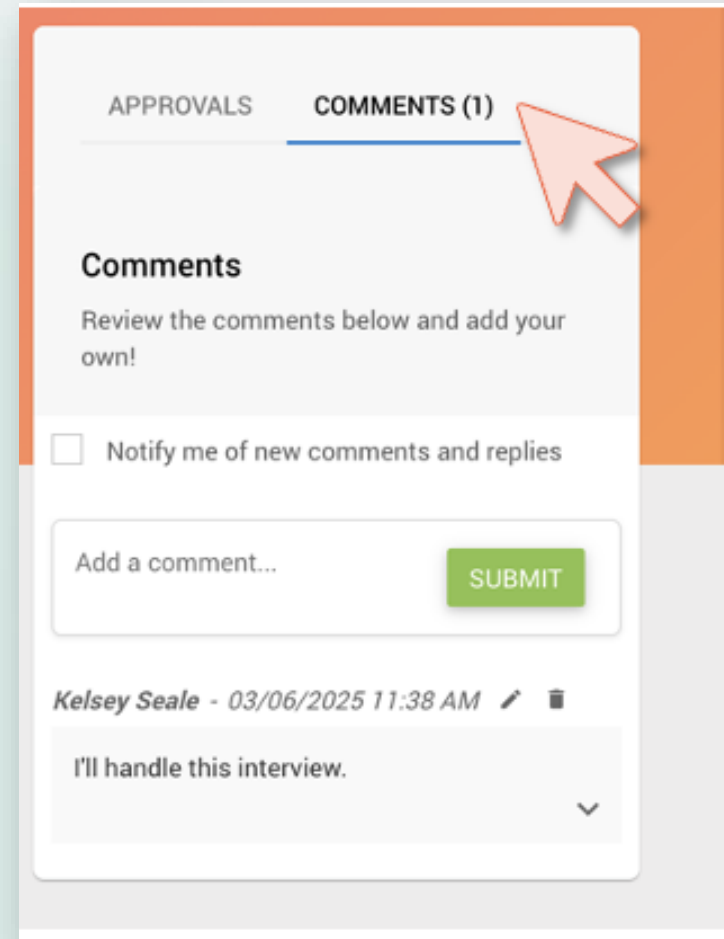
Control who can access and edit this form and its responses.

Who	Roles	Access	
Role	Campus Administrator	can	Edit

ADD RIGHT

Once a form has been denied, can the submitter make new changes and resubmit?

- No, they'll need to make a new submission.
- Want to give the change to edit? Use form commenting to suggest edits **BEFORE** denying the submission.



The screenshot displays a user interface for form commenting. At the top, there are two tabs: 'APPROVALS' and 'COMMENTS (1)'. The 'COMMENTS (1)' tab is selected and underlined, with a mouse cursor pointing to it. Below the tabs, the section is titled 'Comments' and contains the instruction 'Review the comments below and add your own!'. There is a checkbox labeled 'Notify me of new comments and replies' which is currently unchecked. Below this is a text input field with the placeholder 'Add a comment...' and a green 'SUBMIT' button. A comment from 'Kelsey Seale' is shown, dated '03/06/2025 11:38 AM', with the text 'I'll handle this interview.' and a dropdown arrow on the right.

A form response was auto-approved even though we have an approval workflow!

- This usually happens when the submitted response didn't meet the conditions required to trigger the approval workflow.
- Since none of the conditions were triggered, the form response didn't have anyone to go to approve, hence the auto-approval.
- Need help reviewing the submission or identifying exactly which condition wasn't triggered, they can reach out via live chat or open a support ticket.

Best Practices

Work out of your Responses Inbox instead of the Requests Tab

The screenshot displays the 'Forms' section of the Modern Campus interface. The main header is 'Forms' with a red background. Below it are navigation tabs: 'RESPONSES' (selected), 'MY FORMS', 'CAMPUS FORMS', 'FORM CATEGORIES', and 'BASE FORMS'. Under 'RESPONSES', there are sub-tabs for 'INBOX', 'OUTBOX', and 'SHARED'. The 'INBOX' tab is active, showing a list of responses. The interface includes a search bar, filters for 'FORM', 'STATUS', and 'DATES', and a refresh button. The response list contains three entries:

Form Title	Status	Date
Event Registration Hot Chocolate Social	Approved	Dec 15
Organization Registration Knitting Club	Draft	Dec 5
Organization Registration		Dec 5

When your process requires role-based approvals, use the “role” approval stage rather than updating the user each year.

- The "Treasurer of SGA" can approve year after year without making updates to the form (as long as they are appropriately doing transitions and/or updating officers).
- If Tiffany is the treasurer and they have the approval assigned to Tiffany, they will have to update the form next year when Angelo becomes treasurer.

Q&A

Please put your questions into
the Zoom Q&A feature!

Thank You

See you next month!

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campus

modern[®]
campus



