

Action Steps of Web Forms

Duplicating

The duplicate option creates a new form containing all of the content from a previously completed (locked) form as the starting values, but none of the signatures. This is useful for removing redundancy when several forms of the same content need to be issued or a complex form needs to be resubmitted.

1. The Final Approver locks a form so no further changes can be made, or a Submitter can lock a form to prevent the request from further processing. The original submitter of the form is notified that the form has been completed. Once locked, the form can be duplicated by any submitter or approver with access to the form. The duplicated form will have (if applicable) a new Submitter, and no signatures.
Note: the ability to UNLOCK a form is only available to the individual responsible for locking the form.
2. Retrieve locked and completed form. There are a few ways to retrieve the form:
 - a. Through e-mail notifications of the form, this will contain a reference form link.
 - b. Through the **Form Finder** feature, this is a search tool available on the main menu under **Tools** (<https://forms.oakland.edu>).
 - Define your criteria through Form Name and select a date range for when your form was originally created. No criteria are required, but this will be helpful in limiting the form results.
 - c. Or, contact the UTS Helpdesk (x 4357) for assistance retrieving your form.
3. After bringing up a locked form, the Submitter will find the DUPLICATE button, which is located towards the bottom of the form, just above the Signatures fields. Click Duplicate.

The screenshot shows a web form interface. At the top, there is a yellow header bar labeled "Routing Instructions". Below this, there is a section titled "Follow these instructions to determine the Route To address that must be entered in the box below." followed by four lines of instructions for different roles: Submitter, Department Head, Administrative Head / Dean, and Vice President / Provost. Below the instructions is a large yellow box containing the text "Web Form #29292" and "Form is Complete". At the bottom of this yellow box are two buttons: "Unlock" and "Duplicate". The "Duplicate" button is circled in red. Below the yellow box is a section titled "Signatures" which contains a table with columns: Name, Title/Dept, Email, Time, Status, Action, and Comments. A red arrow points from the text "Duplicate Feature" to the "Duplicate" button.

Duplicate Feature

4. A message will popup indicating you are about to duplicate the form. Click OK.
5. You will now be looking at a "New Form" (the label you will see in the upper right corner) containing the content from the form you duplicated. Be sure to remove any duplicated content that is no longer applicable (e.g. comment fields, date fields, any "For Office Use Only" fields).
6. Submit the form according to the Routing Instructions.