

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.

Routing Instructions

Follow these instructions to determine the **Route To** address that must be entered in the box below.

Submitter: send to the Department Head

Department Head: approve and submit to Administrative Head / Dean **or** return to submitter

Administrative Head / Dean: approve and send to Vice President / Provost **or** return to previous approver

Vice President / Provost: approve and submit to President ([@oakland.edu](mailto:president@oakland.edu)) **or** return to previous approver

Web Form #29292

Form is Complete

Unlock Duplicate

Signatures

Name	Title/Dept	Email	Time	Status	Action	Comments
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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.