UAB Electronic Forms Dashboard
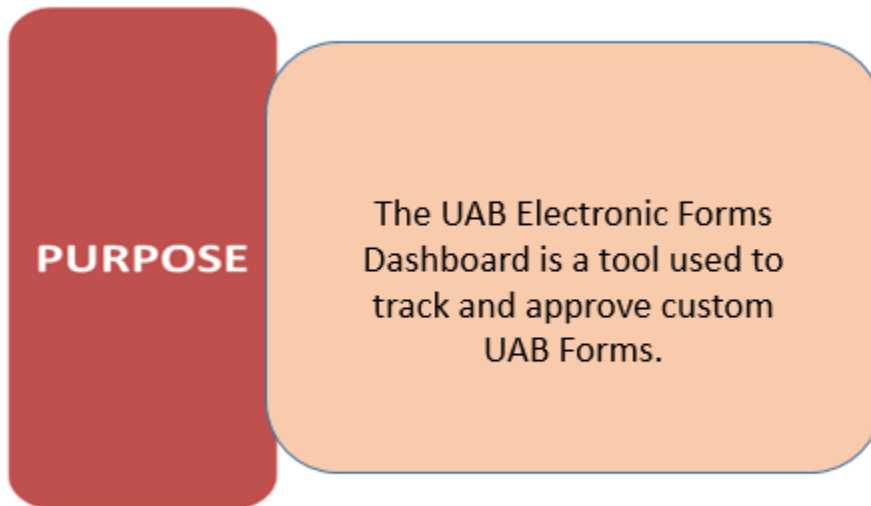
PAR/CRF Approver Training

UAB Electronic Forms Dashboard Approval

Introduction

Welcome to the UAB Electronic Forms Dashboard. This course was designed to be a guide to the forms approval process through the Dashboard.

PURPOSE

The UAB Electronic Forms Dashboard is a tool used to track and approve custom UAB Forms.

What This Course Covers

At the end of this course you will be able to:

- What forms are available on the Dashboard
- Dashboard overview –
  - navigation, quick links, alerts, submitted forms, forms for approval
- How do I track a form
- How do I approve a form
  - Adding Dynamic approvers
- Email notification

UAB Electronic Forms Dashboard Approval

What forms can I approve?

The following forms are currently available on the Dashboard:

- Nepotism Exception Form
- UAB-Related International Travel Registration (submitted after 11/15/2019)
- Faculty Data Form (submitted after 11/23/2019)
- Conflict of Interest Form (submitted after 11/29/2019)
- CRF/PAR (submitted after 2/8/2020)

UAB Electronic Forms Dashboard Approval

Dashboard Overview

Here you will see a Welcome to the Dashboard, the Blazer ID of the person logged in will be displayed here. This should be your Blazer ID.

The Home button will take you back to this view of the Dashboard Homepage.

The Forms Quick links drop down is the location of the following items that may be used to seeing in tabs on the legacy system.

You will only have access to Form History and Reports/Print Views with the appropriate permissions.

UAB Electronic Forms Dashboard Approval

Forms Quick links drop down:
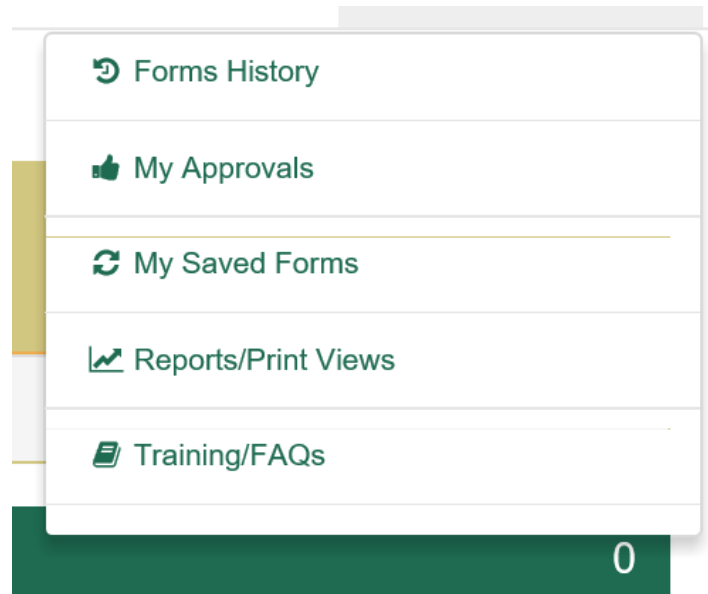
All history from the Legacy Dashboard will be available in reports, you will need appropriate permissions to access these reports.

UAB Electronic Forms Dashboard Approval

Left Navigation Buttons:
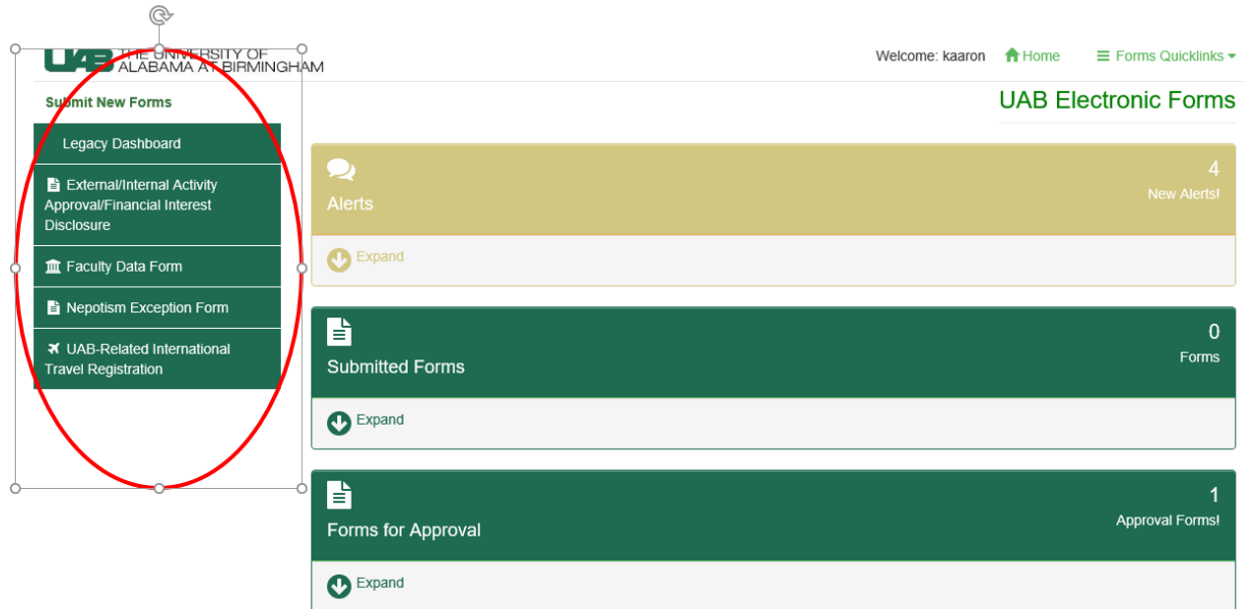
These buttons allow quick navigation to available forms. You will ONLY be able to open a blank form with the appropriate permissions. You may have permission to access some or all of the custom forms.

The Legacy Dashboard button will take you to the prior UAB Electronic Forms Dashboard. This Dashboard will become unavailable in the near future. All history will be available in the reports through the Forms Quick Links.

UAB Electronic Forms Dashboard Approval

Alerts:

On the right hand side of the Alert bar you will see a number of new alerts, if you click on the expand arrow, you can see the alert details.

By clicking on the up arrow, you can collapse the section.

UAB Electronic Forms Dashboard Approval
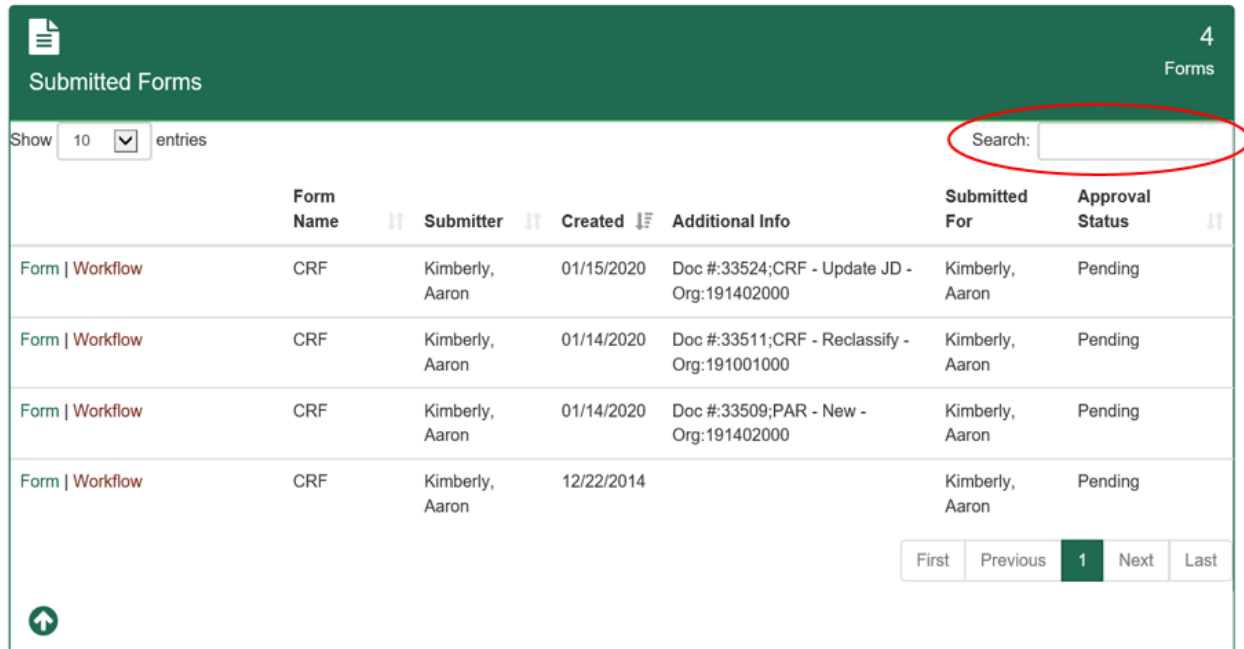
Submitted Forms:

On the right hand side of the Submitted Forms bar you will see a number of forms that you have submitted, if you click on the expand arrow, you can see links to the submitted forms. This will include all saved forms and submitted forms in process for the past 7 days. Submitted forms older than 7 days can be found in Forms History under the Quicklinks dropdown.

You can also access SAVED FORMS through the quick links navigation button at the top right of the Dashboard page.

UAB Electronic Forms Dashboard Approval

The search box allows you to search on any of the columns. You also can sort the Submitter and Created columns by clicking on the column header. The first click will sort in oldest to newest order. To sort newest to oldest, click the column header again. Both search and sort can be used together.

UAB Electronic Forms Dashboard Approval
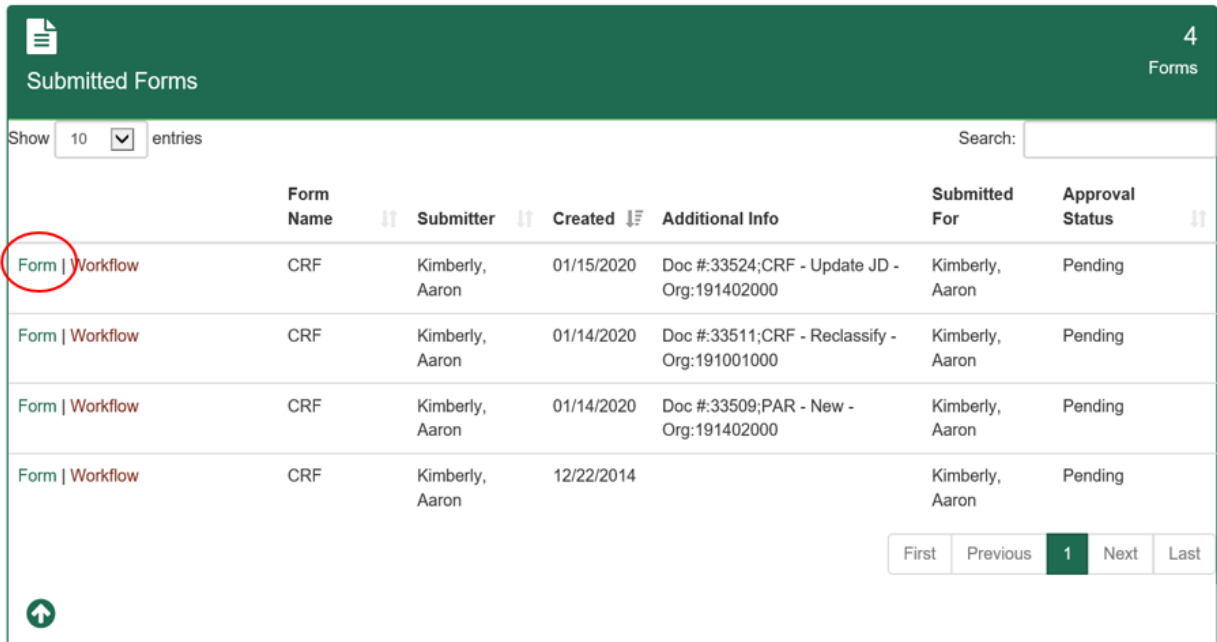

Page navigation is available at the bottom right of the expanded section. You can use this function with both the search and sort functions.

UAB Electronic Forms Dashboard Approval
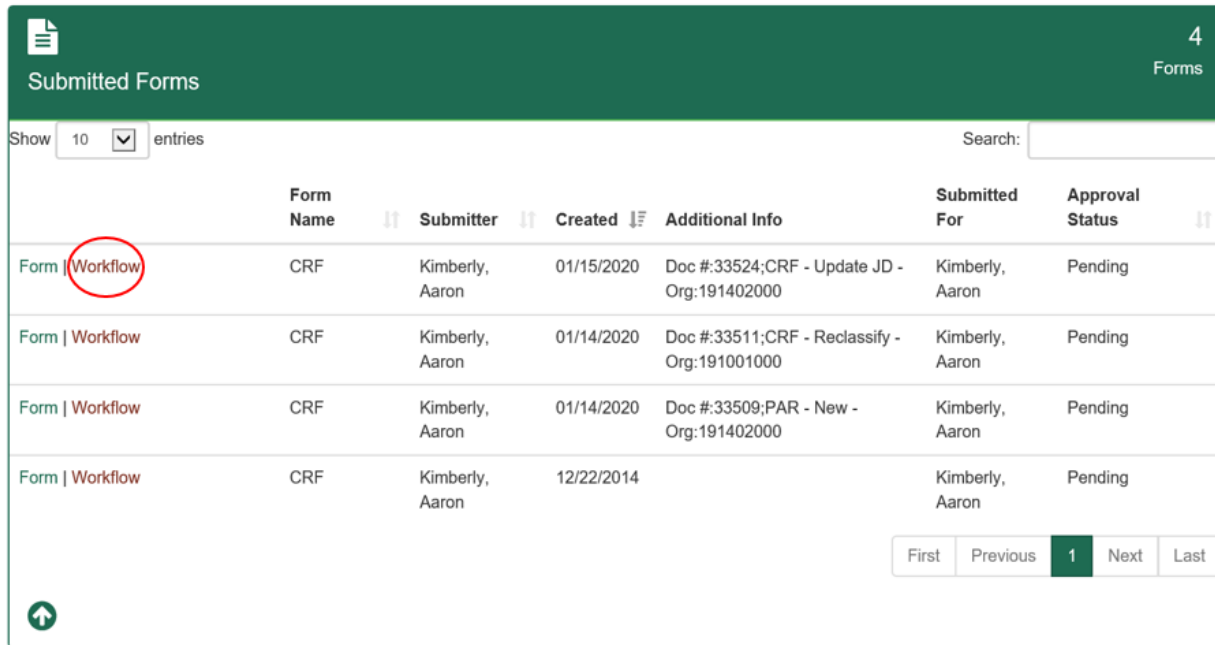
The FORM link will take you to the form in a new tab in your browser.

- Saved Form – you can continue to work and submit your form.
- Submitted Forms- you can view submitted forms, but cannot make any changes.

UAB Electronic Forms Dashboard Approval

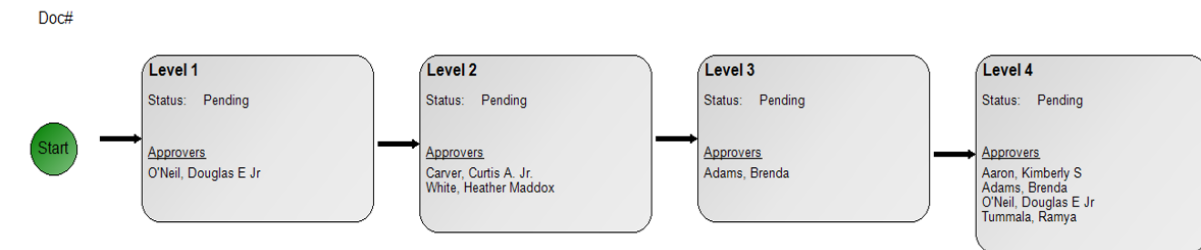The WORKFLOW link will show you where your document is in the workflow process and who the approvers are in workflow.

To close the workflow diagram click the close button.

UAB Electronic Forms Dashboard Approval

Click the up arrow to collapse the Submitted Forms section.

UAB Electronic Forms Dashboard Approval

Form Approval:

On the right hand side of the Forms for Approval bar you will see a number of forms for your approval, if you click on the expand arrow, you can see links to the forms.

You can adjust the number of forms available on the screen in the upper left hand of the section.

UAB Electronic Forms Dashboard Approval

The search box allows you to search on columns, you can search on any of the columns. You also can sort the Submitter, Created and Additional Info columns by clicking on the column header. The first click will sort in oldest to newest order. To sort newest to oldest, click the column header again.

Page navigation is available at the bottom right of the expanded section. You can use this function with both the search and sort functions.

UAB Electronic Forms Dashboard Approval

Approval:

To approve a pending document, click on the Review/Approve link. This will open up the form for your review.
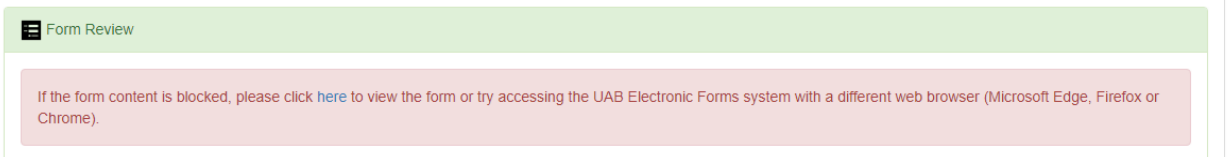
If you are unable to see the form in the frame, click on the link to open the form in a new tab.

UAB Electronic Forms Dashboard Approval

The form displayed in the frame is the form that was submitted.

Verify all information on the form before completing the approval process.
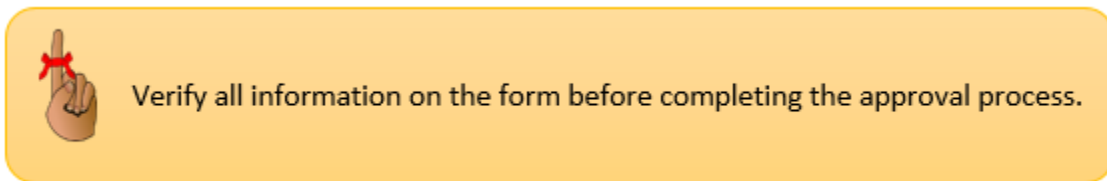
The form has three sections that will need verification:

- Position Information
- Administration
- Submitter/Approval Information

UAB Electronic Forms Dashboard Approval

Approval options:

- Approve
- Cancel
- Reject
- Return to Requestor

Comments may be added in the comments section, this section is not required.

It is required to check the box confirming that you have reviewed the form entirely before submitting your approval.

If no additional approvers (outside of workflow) are needed, click the Submit button.

UAB Electronic Forms Dashboard Approval

Dynamic approvals:

In this section, you can add additional approvers that are not currently in the workflow process. Once you have approved the document, it will then go to the additional approvers. Once it has been approved, it will continue on the workflow path.

To add a dynamic approver, click the Add Approver button. A new box will open.

UAB Electronic Forms Dashboard
Approval

Add Dynamic Approver:

Optional Dynamic Workflow: Here you may enter a Blazerid for an additional approver not already in the regular workflow to whom you wish to route this form for review and action.

Approver: [Please enter 4 or more characters of either Name or BlazerID]

Add   Close

UAB Electronic Forms Dashboard Approval

Choose the appropriate approver and click add. If you have more dynamic approvers, click add and repeat the process until you are done.

You can also search by name by typing in the first three or four letters of the last name.
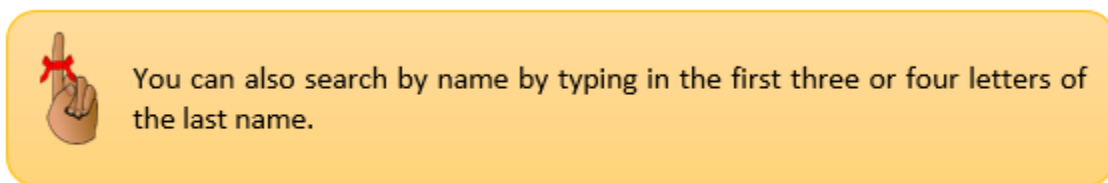
Make sure that the approval type and check box are completed and click submit.

UAB Electronic Forms Dashboard
Approval

Approval History

Approved By	Approval Level	Approval Date	Approval Type
Tummala, Ramya	1	01/15/2020	Department WAM Approvers
Tummala, Ramya	2	01/15/2020	STAFF HRM

Workflow History

Doc#

Start

Level 1

Status: Approved 01/15/2020
           by Tummala, Ramya

Approvers
Aaron, Kimberly S
O'Neil, Douglas E Jr
Tummala, Ramya

Level 2

Status: Approved 01/15/2020
           by Tummala, Ramya

Approvers
Adams, Brenda
Tummala, Ramya

Level 3

Status: Pending

Approvers
Aaron, Kimberly S
Adams, Brenda
O'Neil, Douglas E Jr
Tummala, Ramya

A workflow overview is displayed at the bottom of the approval form. Note that it does not include any dynamic approvers that you have added. To view the workflow with the dynamic approvers, click the workflow link in forms for approval.

UAB Electronic Forms Dashboard Approval

Email notification:

You will receive an email when there is a document ready for your approval, you can click the link in the email to take you to the Dashboard.

Click here to approve the Form

A UAB Position Authorization/Compensation Request Form submitted by Aaron, Kimberly requires your approval. Please click on the link above to review the form for approval.

Additional Form Information
Form Type: Request to Update Job Description Only
Location: Campus
Document Number: 33524
Dept/Division/Org #: 191402000 APPLICATIONS & CONSULTING SVCS
Job Code/Title (Current): I020046.SOFTWARE DEVELOPER III-ENT
Job Code/Title (Requested):
Position Number (Current):
Position Number (Requested):
Submitted By: Aaron, Kimberly
Submitter Job Title: SYSTEMS ANALYST-ENT
Submission Date: 01/15/2020

**** Please do not reply to this message. This email address is not monitored. ****

UAB Electronic Forms Dashboard Approval

Conclusion

This concludes the UAB Electronic Forms Dashboard Approval course.

Additional Training:

The primary source for training is the online tutorial. For the online tutorial please see the Training tab on the UAB Forms site atwww.uab.edu/uabforms.

General Questions:

Questions regarding general and technical use of UAB Electronic Forms Dashboard should be directed to AskIT@uab.edu or by calling 6-5555.