UAB Electronic Forms Dashboard
PAR/CRF Approver Training
Introduction

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

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
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)
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.
Forms Quick links drop down:

- Forms History
- My Approvals
- My Saved Forms
- Reports/Print Views
- Training/FAQs

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.
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.
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.
Page navigation is available at the bottom right of the expanded section. You can use this function with both the search and sort functions.
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.
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.
Click the up arrow to collapse the Submitted Forms section.
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.
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.
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.
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
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.
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.
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
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.
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.
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.

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: 33324
Dept/Division/Org #: 191402000 APPLICATIONS & CONSULTING SVCS
Job Code/Title (Current): 1020046 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. ****
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 at www.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.