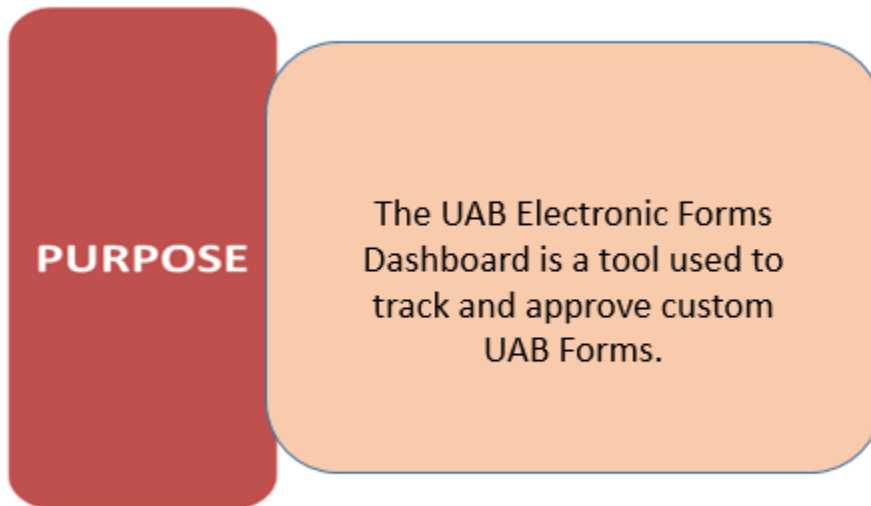


**UAB Electronic Forms Dashboard**  
PAR/CRF Approver Training

# 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.



## 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

UAB THE UNIVERSITY OF ALABAMA AT BIRMINGHAM

Welcome: kaaron [Home](#) [Forms Quicklinks](#)

**Submit New Forms**

- Legacy Dashboard
- External/Internal Activity Approval/Financial Interest Disclosure
- Faculty Data Form
- Nepotism Exception Form
- UAB-Related International Travel Registration

**Alerts** 4 New Alerts!

Expand

**Submitted Forms** 0 Forms

Expand

**Forms for Approval** 1 Approval Forms!

Expand

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.

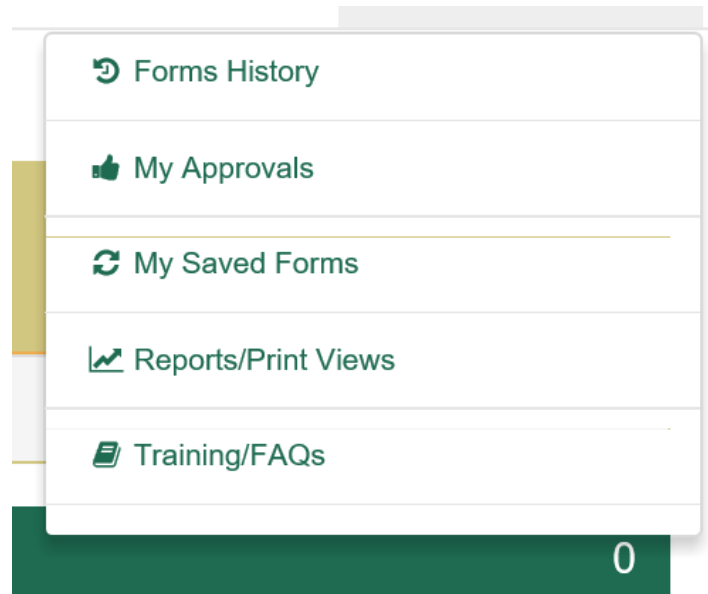
The Forms Quick links drop down is the location of the following items that may be used to seeing in tabs on the legacy system.



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

# UAB Electronic Forms Dashboard Approval

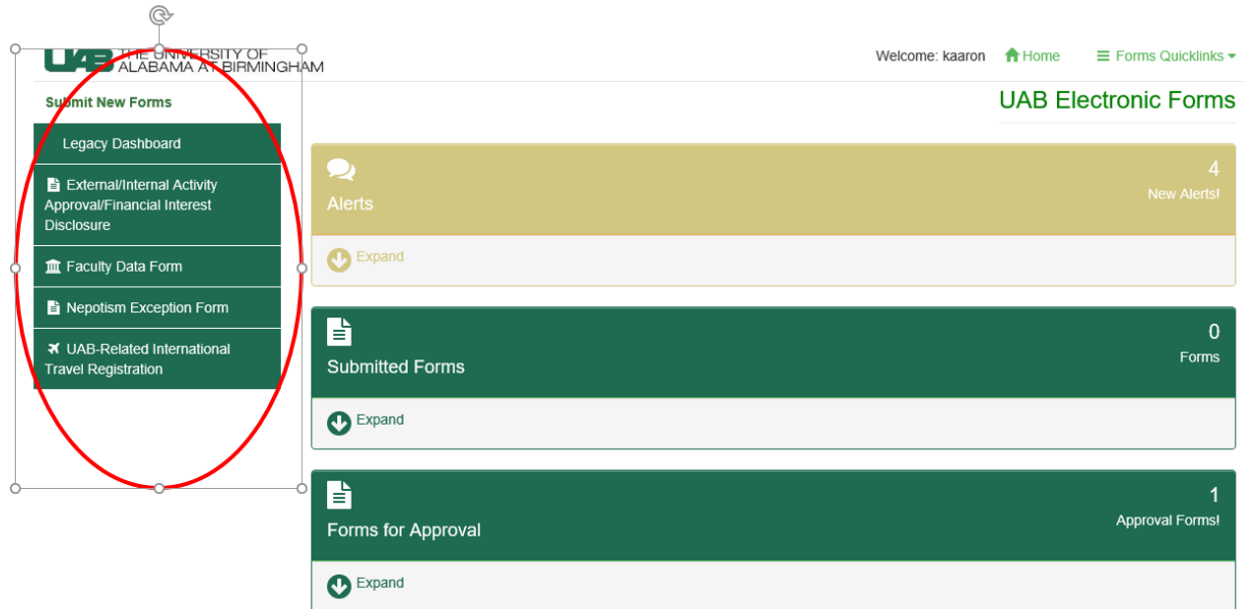
Forms Quick links drop down:



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:

The screenshot shows the UAB Electronic Forms Dashboard. On the left is a sidebar with navigation options: Legacy Dashboard, External/Internal Activity Approval/Financial Interest Disclosure, Faculty Data Form, Nepotism Exception Form, and UAB-Related International Travel Registration. The main content area is titled "UAB Electronic Forms" and contains three summary cards: "Alerts" (4 New Alerts), "Submitted Forms" (0 Forms), and "Forms for Approval" (1 Approval Form). The "Alerts" card is circled in red, and its "Expand" button is also circled in red.

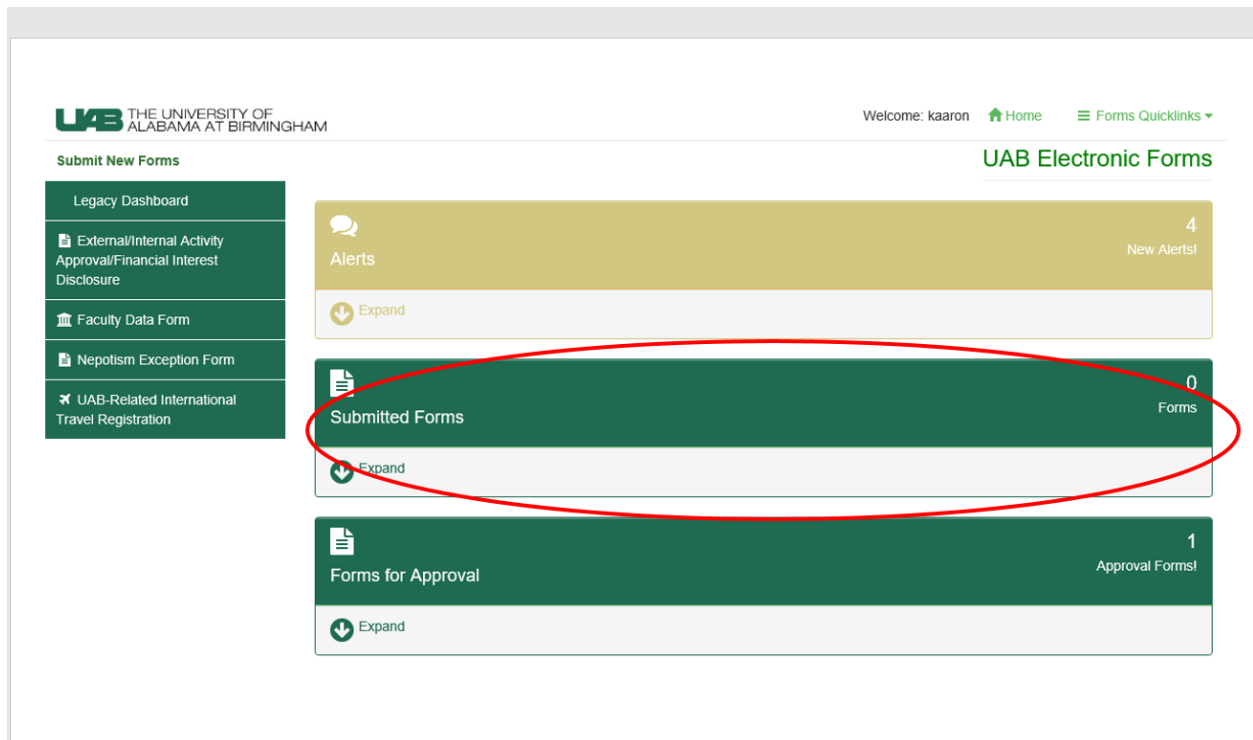
On the right hand side of the Alert bar you will see a number of new alerts, if you click on the expand arrow, you can see the alert details.

The expanded Alerts section displays a welcome message: "Welcome to the new UAB Forms Dashboard. Currently, only 4 forms are being hosted here – the Nepotism Exception form, UAB-Related International Travel Registrations (submitted after 11/15/2019), Faculty Data Form (submitted after 11/23/2019) and Conflict of Interest forms (submitted after 11/29/2019). If you are looking for other forms like CRF/PAR, please click [HERE](#) to return to the legacy dashboard." It also includes an update notice: "**UPDATE!!** UAB-Related International Travel Registrations (UAB ITR) submitted after 11/15/2019, Faculty Data Forms submitted after 11/23/2019 and Conflict of Interest forms submitted after 11/29/2019 are now available for review below. For UAB ITR forms submitted prior to 11/15/2019, Faculty Data Forms submitted prior to 11/23/2019 and COI forms submitted prior to 11/29/2019 still pending review, please check [HERE](#) to return to the legacy dashboard. Those forms will be available for review and action only until 12/15/2019. After 12/15/2019, any pending forms still requiring review and action will have to be resubmitted in the new form. All approved, rejected, and pending forms before and after 11/15/2019 are available on the Reports view with appropriate permissions." Below the message, there is a link to "Forms Quicklinks" and a section for "New Features: Graphical Workflow Display, Streamlined Approval Page, Search and Sort within the display grids." At the bottom left of the expanded section, an up arrow icon is circled in red.

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

# UAB Electronic Forms Dashboard Approval

## Submitted Forms:



The screenshot shows the UAB Electronic Forms Dashboard. At the top left is the UAB logo and "THE UNIVERSITY OF ALABAMA AT BIRMINGHAM". At the top right, it says "Welcome: kaaron" with a home icon and a "Forms Quicklinks" dropdown menu. Below the logo is a "Submit New Forms" section with a list of links: Legacy Dashboard, External/Internal Activity Approval/Financial Interest Disclosure, Faculty Data Form, Nepotism Exception Form, and UAB-Related International Travel Registration. To the right of this list is the "UAB Electronic Forms" section. It contains three bars: "Alerts" with 4 New Alerts! and an Expand button; "Submitted Forms" with 0 Forms and an Expand button (circled in red); and "Forms for Approval" with 1 Approval Forms! and an Expand button.

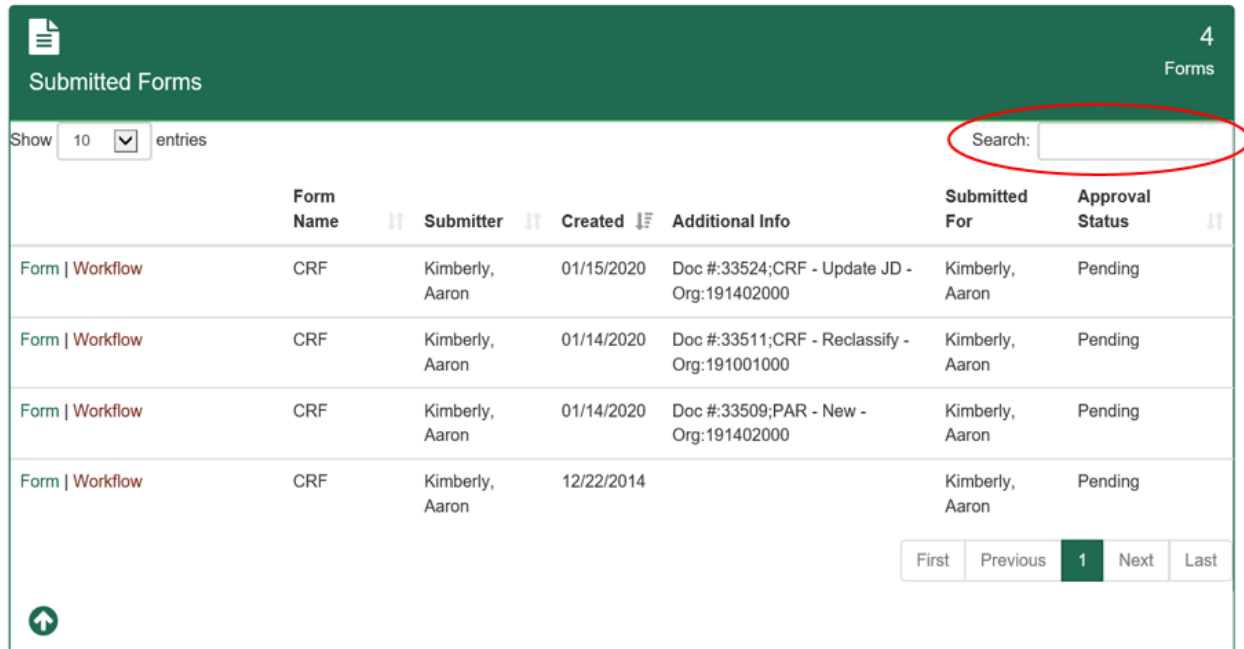
On the right hand side of the Submitted Forms bar you will see a number of forms that you have submitted, if you click on the expand arrow, you can see links to the submitted forms. This will include all saved forms and submitted forms in process for the past 7 days. Submitted forms older than 7 days 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 screenshot displays a dashboard titled "Submitted Forms" with a green header. In the top right corner, it indicates "4 Forms". Below the header, there is a "Show 10 entries" dropdown menu and a search box labeled "Search:" which is circled in red. The main content is a table with the following columns: Form Name, Submitter, Created, Additional Info, Submitted For, and Approval Status. The table contains four rows of data, all with a "Pending" status. At the bottom right, there are pagination controls: "First", "Previous", "1" (highlighted), "Next", and "Last". A green up arrow icon is located in the bottom left corner.

	Form Name	Submitter	Created	Additional Info	Submitted For	Approval Status
Form   Workflow	CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	01/14/2020	Doc #:33511;CRF - Reclassify - Org:191001000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	01/14/2020	Doc #:33509;PAR - New - Org:191402000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	12/22/2014		Kimberly, Aaron	Pending

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

 Submitted Forms 4 Forms

Show  entries Search:

	Form Name	Submitter	Created	Additional Info	Submitted For	Approval Status
Form   Workflow	CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	01/14/2020	Doc #:33511;CRF - Reclassify - Org:191001000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	01/14/2020	Doc #:33509;PAR - New - Org:191402000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	12/22/2014		Kimberly, Aaron	Pending

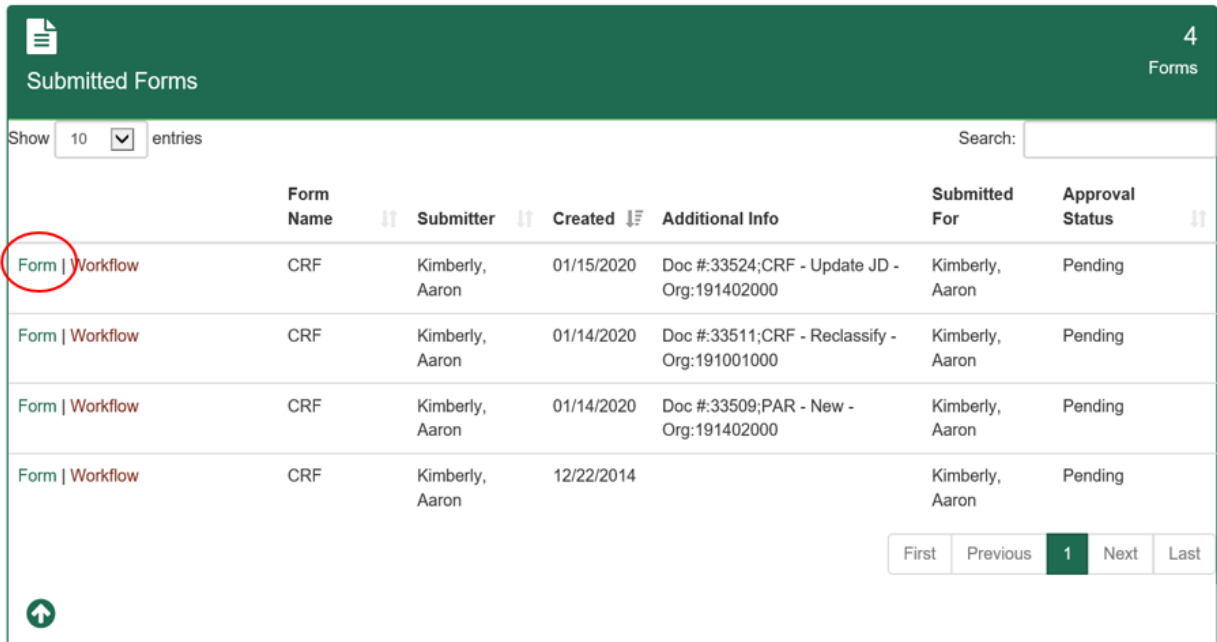
First Previous 1 Next Last



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




Submitted Forms 4 Forms

Show  entries Search:

	Form Name	Submitter	Created	Additional Info	Submitted For	Approval Status
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron	Pending
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	01/14/2020	Doc #:33511;CRF - Reclassify - Org:191001000	Kimberly, Aaron	Pending
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	01/14/2020	Doc #:33509;PAR - New - Org:191402000	Kimberly, Aaron	Pending
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	12/22/2014		Kimberly, Aaron	Pending

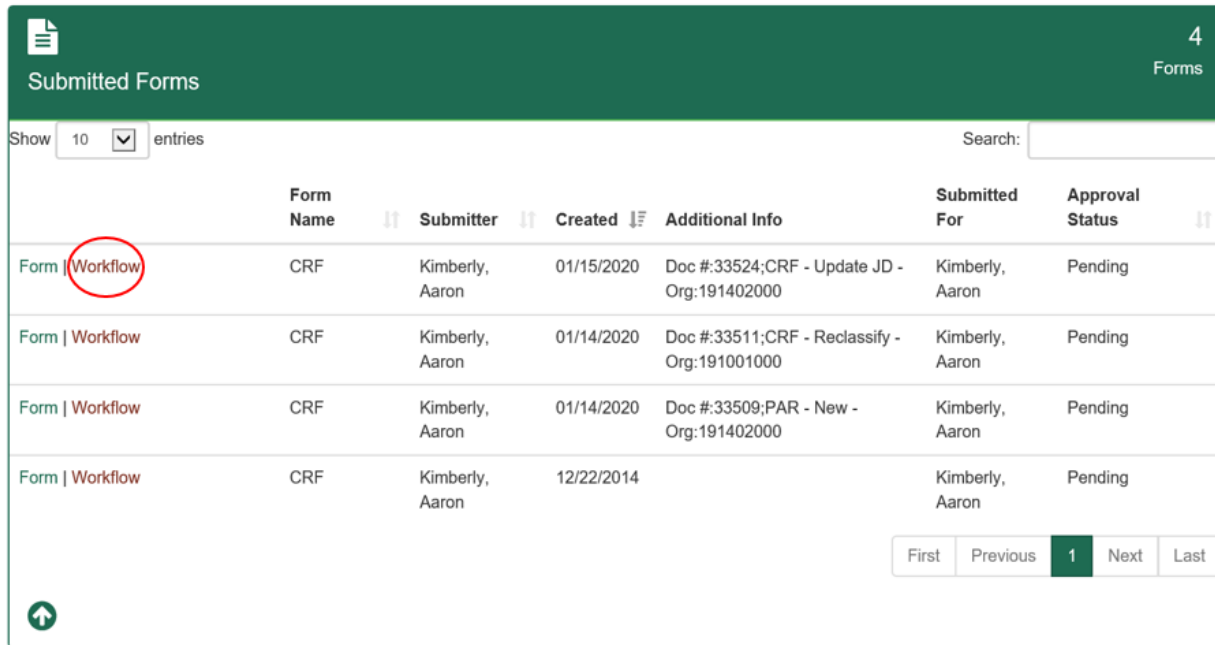
[First](#) [Previous](#) **1** [Next](#) [Last](#)



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



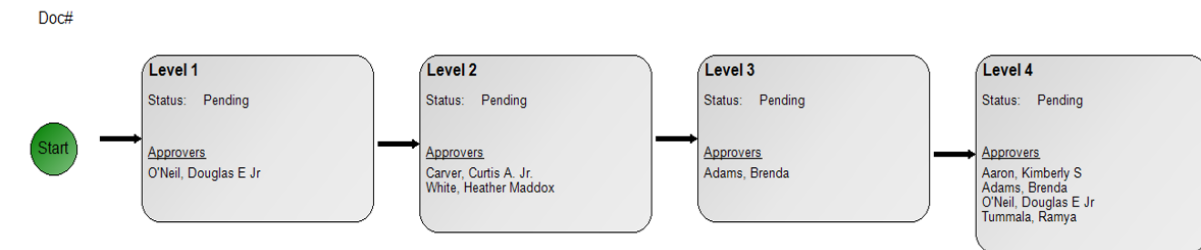
Submitted Forms 4 Forms

Show 10 entries Search:

	Form Name	Submitter	Created	Additional Info	Submitted For	Approval Status
Form   <b>Workflow</b>	CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	01/14/2020	Doc #:33511;CRF - Reclassify - Org:191001000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	01/14/2020	Doc #:33509;PAR - New - Org:191402000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	12/22/2014		Kimberly, Aaron	Pending

First Previous 1 Next Last


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



Close

To close the workflow diagram click the close button.


# UAB Electronic Forms Dashboard Approval

 Submitted Forms 4 Forms

Show  entries Search:

	Form Name	Submitter	Created	Additional Info	Submitted For	Approval Status
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron	Pending
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	01/14/2020	Doc #:33511;CRF - Reclassify - Org:191001000	Kimberly, Aaron	Pending
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	01/14/2020	Doc #:33509;PAR - New - Org:191402000	Kimberly, Aaron	Pending
<a href="#">Form   Workflow</a>	CRF	Kimberly, Aaron	12/22/2014		Kimberly, Aaron	Pending

[First](#) [Previous](#) **1** [Next](#) [Last](#)



Click the up arrow to collapse the Submitted Forms section.

# UAB Electronic Forms Dashboard Approval

## Form Approval:

The screenshot shows the UAB Electronic Forms Dashboard. On the left is a 'Submit New Forms' sidebar with links to Legacy Dashboard, External/Internal Activity Approval/Financial Interest Disclosure, Faculty Data Form, Nepotism Exception Form, and UAB-Related International Travel Registration. The main content area has three cards: Alerts (4 New Alerts), Submitted Forms (0 Forms), and Forms for Approval (1 Approval Form). The 'Forms for Approval' card is circled in red.

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.

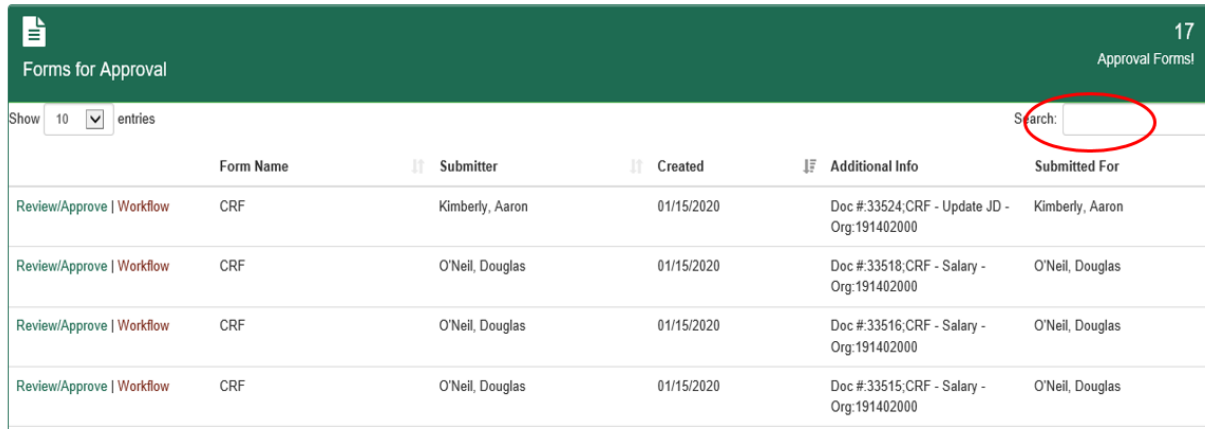
The expanded 'Forms for Approval' section shows a table with 17 entries. The 'Show 10 entries' control is circled in red. The table has columns for Form Name, Submitter, Created, Additional Info, and Submitted For.

Form Name	Submitter	Created	Additional Info	Submitted For
Review/Approve   Workflow CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron
Review/Approve   Workflow CRF	O'Neil, Douglas	01/15/2020	Doc #:33518;CRF - Salary - Org:191402000	O'Neil, Douglas
Review/Approve   Workflow CRF	O'Neil, Douglas	01/15/2020	Doc #:33516;CRF - Salary - Org:191402000	O'Neil, Douglas
Review/Approve   Workflow CRF	O'Neil, Douglas	01/15/2020	Doc #:33515;CRF - Salary - Org:191402000	O'Neil, Douglas

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 screenshot shows the 'Forms for Approval' dashboard. At the top right, there is a green header with a document icon, the text 'Forms for Approval', and the number '17' next to 'Approval Forms'. Below the header, there is a search bar with the text 'Search:' and a red circle around it. The main content is a table with the following columns: Form Name, Submitter, Created, Additional Info, and Submitted For. The table contains four rows of data.

	Form Name	Submitter	Created	Additional Info	Submitted For
Review/Approve   Workflow	CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron
Review/Approve   Workflow	CRF	O'Neil, Douglas	01/15/2020	Doc #:33518;CRF - Salary - Org:191402000	O'Neil, Douglas
Review/Approve   Workflow	CRF	O'Neil, Douglas	01/15/2020	Doc #:33516;CRF - Salary - Org:191402000	O'Neil, Douglas
Review/Approve   Workflow	CRF	O'Neil, Douglas	01/15/2020	Doc #:33515;CRF - Salary - Org:191402000	O'Neil, Douglas

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.



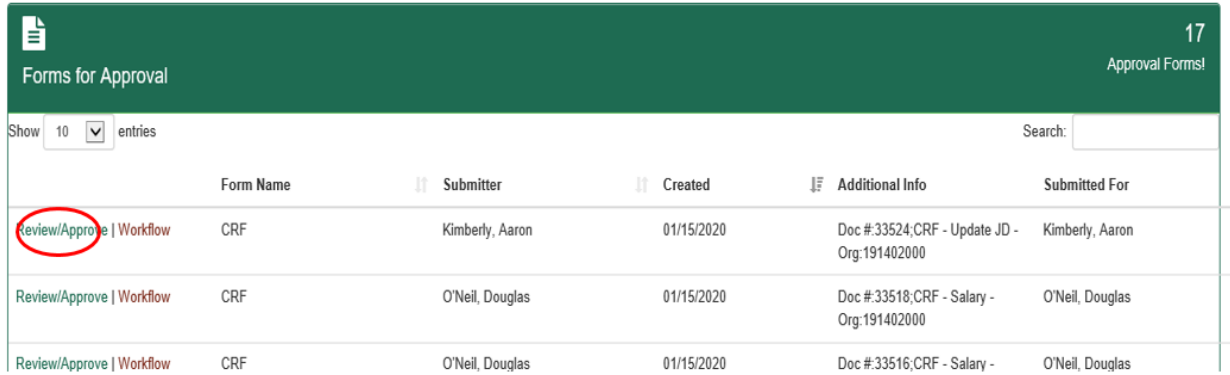
The screenshot shows a table with the following columns: Form Name, Submitter, Created, Additional Info, and Submitted For. The table contains two rows of data. At the bottom right of the table, there is a pagination control with buttons for 'First', 'Previous', '1', 'Next', and 'Last'. The '1' button is highlighted with a red circle.

Form   Workflow	CRF	Kimberly, Aaron	01/14/2020	Doc #:33509;PAR - New - Org:191402000	Kimberly, Aaron	Pending
Form   Workflow	CRF	Kimberly, Aaron	12/22/2014		Kimberly, Aaron	Pending

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

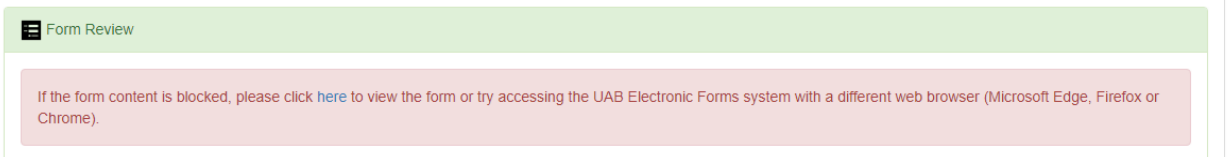
## Approval:



	Form Name	Submitter	Created	Additional Info	Submitted For
<a href="#">Review/Approve   Workflow</a>	CRF	Kimberly, Aaron	01/15/2020	Doc #:33524;CRF - Update JD - Org:191402000	Kimberly, Aaron
<a href="#">Review/Approve   Workflow</a>	CRF	O'Neil, Douglas	01/15/2020	Doc #:33518;CRF - Salary - Org:191402000	O'Neil, Douglas
<a href="#">Review/Approve   Workflow</a>	CRF	O'Neil, Douglas	01/15/2020	Doc #:33516;CRF - Salary -	O'Neil, Douglas

To approve a pending document, click on the Review/Approve link. This will open up the form for your review.

## Approval Screen



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

## Approval Screen

Form Review

If the form content is blocked, please click [here](#) to view the form or try accessing the UAB Electronic Forms system with a different web browser (Microsoft Edge, Firefox or Chrome).

**Update Job Description Only** Print

GENERAL INFORMATION Doc# 33524

**COMPENSATION REQUEST/RATIONALE/JUSTIFICATION FOR CHANGE**

Description \*

Name:

Employee ID:

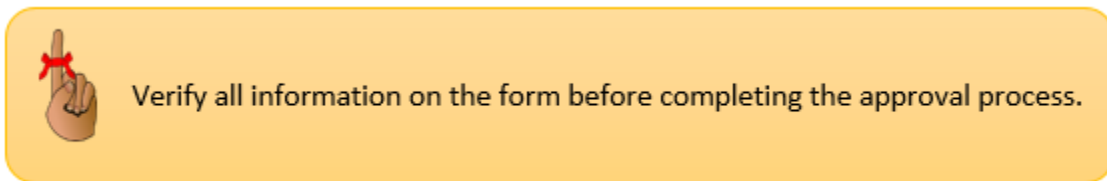
School/Entity: \*

Dept/Division/Org #: \*

Contact Program:

Contact Program Abbreviation:

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



The form has three sections that will need verification:

- Position Information
- Administration
- Submitter/Approval Information

# UAB Electronic Forms Dashboard Approval

Approval Actions

Approval Type: \*

--Select Status--

Comments:

I certify I have reviewed this form. \*

Additional Approvers Add 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.


Name	BlazerID
------	----------

Submit

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:

The screenshot shows the 'Approval Actions' section of the UAB Electronic Forms Dashboard. It includes a dropdown menu for 'Approval Type' with the text '--Select Status--', a 'Comments' text area, and a checkbox labeled 'I certify I have reviewed this form.' Below this is the 'Additional Approvers' section, which is highlighted with a red oval. This section contains a green 'Add Approver' button and a pink informational box that reads: '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.' Underneath the box is a table with two columns: 'Name' and 'BlazerID'. At the bottom left of the form, a green 'Submit' button is also circled in red.

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

Verbs Used to Describe Job Duties. Percentage of time should not be

el

**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:

# UAB Electronic Forms Dashboard Approval

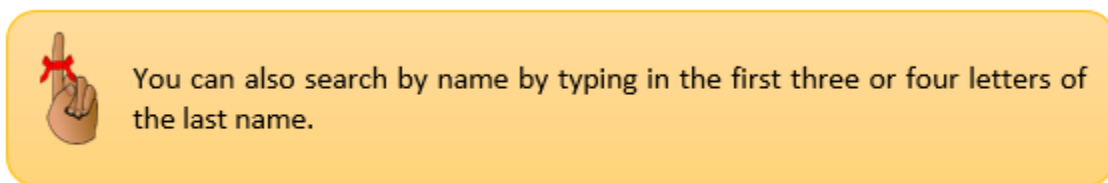
Add Dynamic Approver:

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:

- Aaron, Kiara Nicole | [KAARON21](#)
- Aaron, Kimberly S | [KAARON](#)
- [Kaaret](#), Alana | [AKAARET](#)
- Soota, [Kaartik](#) | [KSOOTA](#)

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



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#

```
graph LR; Start((Start)) --> L1[Level 1]; L1 --> L2[Level 2]; L2 --> L3[Level 3];
```

The workflow diagram consists of three rectangular boxes representing approval levels, connected by arrows from left to right. A green circle labeled 'Start' is on the far left. The first box is yellow and labeled 'Level 1'. It contains the text: 'Status: Approved 01/15/2020 by Tummala, Ramya' and 'Approvers: Aaron, Kimberly S, O'Neil, Douglas E Jr, Tummala, Ramya'. The second box is also yellow and labeled 'Level 2'. It contains the text: 'Status: Approved 01/15/2020 by Tummala, Ramya' and 'Approvers: Adams, Brenda, Tummala, Ramya'. The third box is grey and labeled 'Level 3'. It contains the text: 'Status: Pending' and '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 at [www.uab.edu/uabforms](http://www.uab.edu/uabforms).

### **General Questions:**

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