



USER MANUAL – REVIEW FORM SUBMISSIONS

TARGET AUDIENCE: FORM ADMINISTRATORS

Updated November 1, 2024



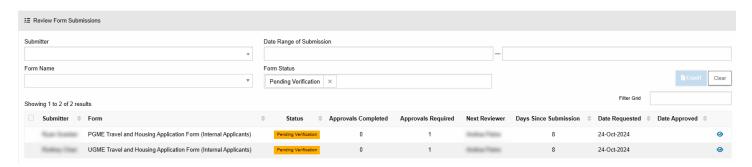


HOW TO REVIEW FORM SUBMISSIONS

As a Form Administrator, you have read only access to all form submissions for the form that you own. You can refer to the "Review Form Submissions" dashboard on your Forms homepage to...

- Review any form that require attention
- See what status of the form is (i.e. pending, approved, etc.)
- See how many approvals are required vs. completed
- See who the next verifier (approver) is in the approval workflow
- See who submitted the form and when
- Etc....

You can use the filters to search for any specific form, status, etc. The "filter grid" will search the data on the dashboard you have filtered.

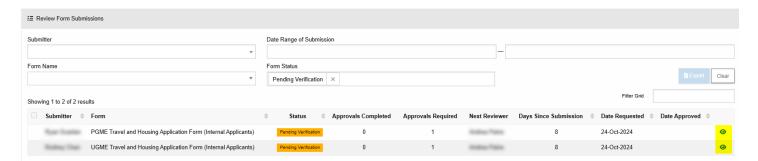


Forms submissions can have one the following status':



If you want to see a copy of the form you can either...

1. Select the eye icon beside the form submission...







2. Download the form submission(s) using the export functionality or the export icon beside the form submission...



If you want to download a form submission, please note that you can only do so once the form has been approved.

Important Note: If you have both an Approver and Form Administrator role, you will have to toggle in your Review Form Submissions Dashboard between...

Administrative View - Read only access to all form submissions for the form that you own.



AND

My Forms – All forms that require your attention as an approver, i.e. read/write access.



There is likely to be overlap in the forms your see in the different dashboard views.

QUESTIONS?

If you have any questions or difficulties with this process, please contact the FHS Forms Manager Team at fhsforms@mcmaster.ca.