New Gift Form

Budget Amendment Rules

1. Initiator
   a. Initiator fills in the form for 
      Instruction (1)

2. Initiator fills in the form for 
   a. Instruction for Gift Donation (2)

3. Initiator fills in the form for 
   a. Instruction for Gift Info (3)

4. Initiator fills in the form for 
   a. Instruction for Initiator (4)

If you need to exit before completing the form, click the "Save" button and exit the browser. Log back into the form system to complete the form. Use this link will take you back to the form. (https://forms.fau.edu/tasks). This is for each page.
If you answer yes to any of the Sponsored Research questions it will route to OSP.

5. Initiator Steps Completed
   a. After the initiator enters the information in the form and clicks the "Continue" button
   
   b. The form will be emailed to first approver. The e-mail will come from noreply@fau.edu

   c. The form will be emailed to second approver. The e-mail will come from noreply@fau.edu

   d. Please inform your approvers of the notification. If the approvers do not receive the e-mail, they can login directly into the form system to review and approve the form. (https://forms.fau.edu/tasks).

6. First Approver
   
   a. Click on tab 1.Instruction and start to review the details
b. Click “Continue” to review next section 2. Gift Donation

c. Click “Continue” to review next section 3. Gift Info

d. Click “Continue” to review next section 4. Gift Donation

e. Click “Continue” to review next section 5. Research

f. Click “Continue” to review next section 6. Approver 1

g. Leave any comments, sign the section and click Continue, the form will be sent to Second approver

h. Initiator, approvers can find / check status at any time, using this link (https://forms.fau.edu/tasks) to log into the Form

8. Find/Track the approval status for each form:

a. Login to frevo form https://forms.fau.edu/tasks/

b. Click on the magnifying glass icon

c. Setup search filters and click “Submit” button

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7. Second Approver

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9. Workflow Configuration and Troubleshooting

Example to Search by Initiator Name

Field
Initiator Name

Condition
Contains

10. Form Submission Complete – Initiator will receive an email and a copy of the form:

Example to Search by Initiator Name

Field
Initiator Name

Condition
Contains

a. Left panel (see diagram) is the list of submissions under NewGift form request

b. Select the submission, click on the arrows icons to show Audit Trail.
   i. 1st column is status (pending/submitted)
   ii. 2nd column is the submitters.
   iii. 3rd column is date/time
   iv. 4th column - approvers

c. Hold the mouse over “By”, For User” or ”For roles”: will see (Submitter's or Approver's full name/role name)

d. Initiator, approvers can find / check status at any time, using this link (https://forms.fau.edu/tasks) to log into the Form