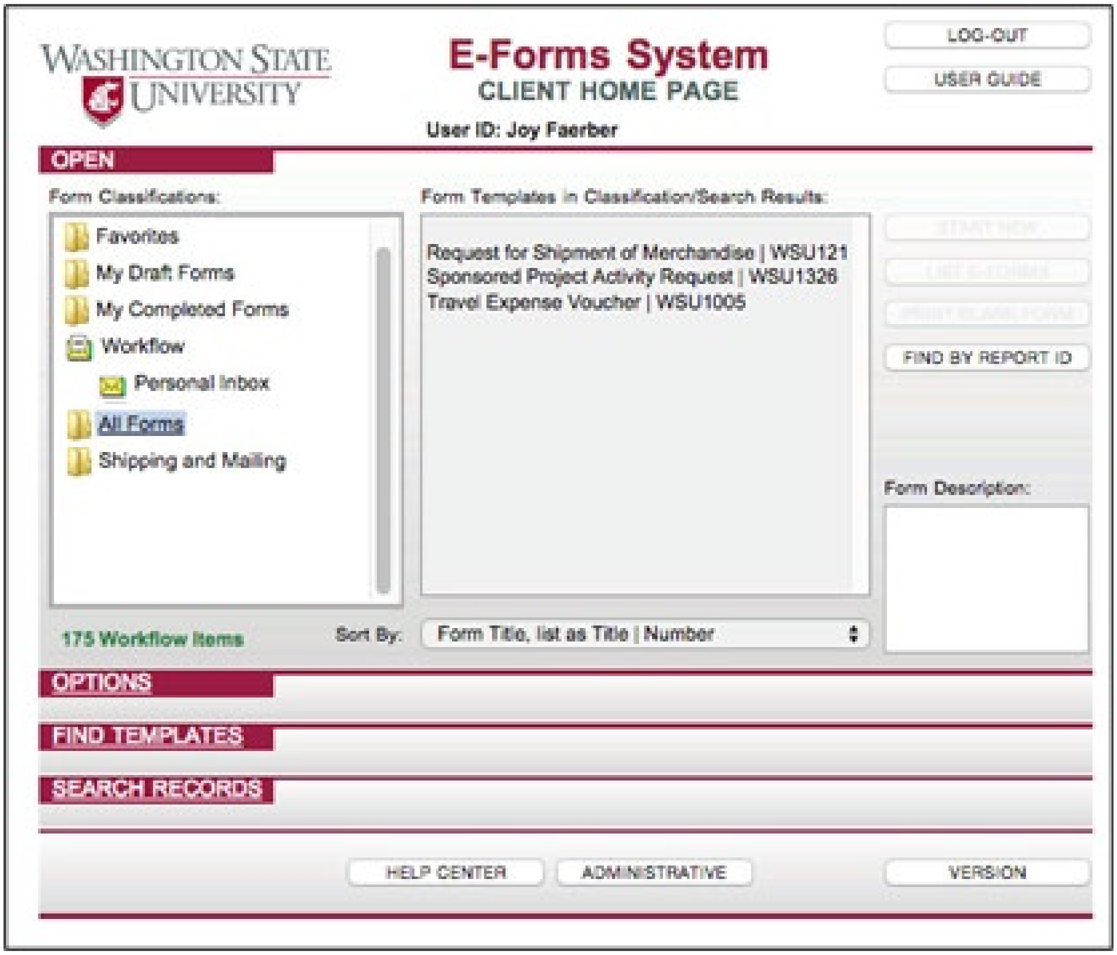
WSU E-FORMS SYSTEM

User Guide



For assistance, contact:
Office of Procedures, Records, and Forms
Information Technology Bldg. 3089
Pullman, WA 99164-1225
509-335-2005
prf.forms@wsu.edu

May 2021

Table of Contents

Figures

INTRODUCTION

WSU E-Forms System Description

The WSU E-Forms System is a browser-based user interface designed to simplify and manage access to electronic forms (e-forms). The system is accessible to WSU employees who have access to the Internet and a valid Network ID and password.

Requirements

Access

Full access to the system is limited to WSU employees that have an "@wsu.edu" e-mail address. If any employee regularly uses another WSU domain address (i.e., vancouver.wsu.edu; vetmed.wsu.edu) or an outside e-mail (i.e., gmail.com) they need to have a wsu.edu domain e-mail set up and configured to forward messages to the e-mail address they regularly use. This enables the user to receive e-mail notifications sent by the E-Forms System.

The System creates a repository for a new user the first time they log into the System using an "@wsu.edu" e-mail address. The user is then able to send and receive e-forms in the System.

Browser Settings

The browser that is used to access the E-Forms System needs JAVA and pop-ups enabled to ensure suitable performance of the program. Internet Explorer and Chrome browsers are recommended for using the E-Forms System.

Log-In

To log into the WSU E-Forms System, go to policies.wsu.edu/prf/index/forms/eforms/ and click on the **WSU E-Forms System Log-In** link (*Fig. 1*).

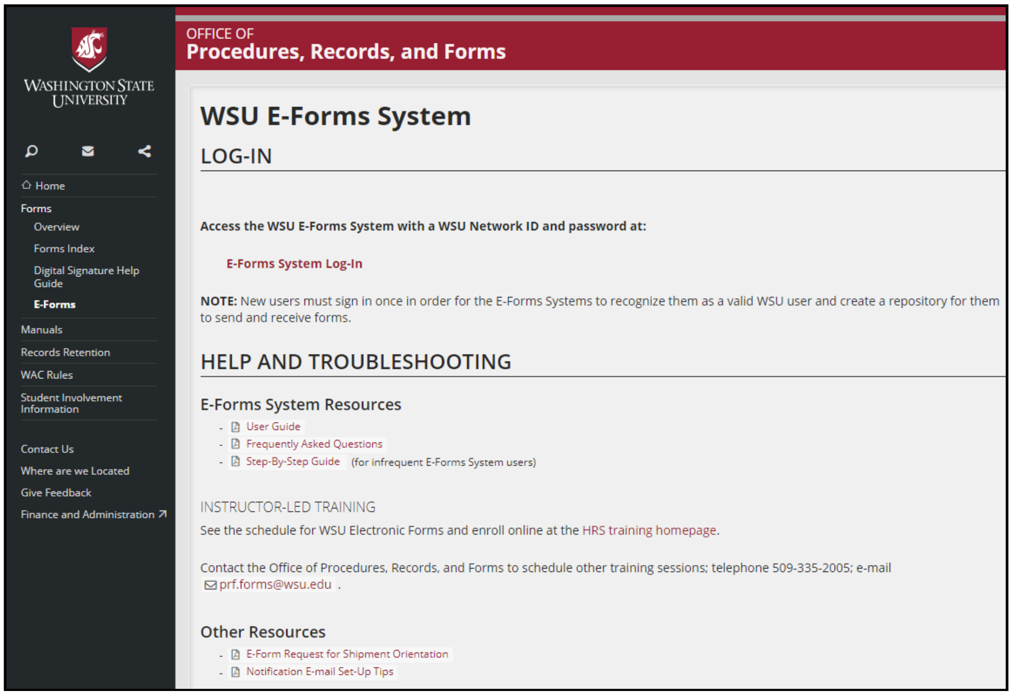


Figure 1 E-Forms Web Page

Sign into the WSU E-Forms System with a WSU Network ID and password (*Fig. 2*). (NOTE: This system requires multi-factor authentication (MFA) to log into. See the WSU SSO Multi-Factor Authentication webpage at: https://its.wsu.edu/its-multi-factor-authentication/).

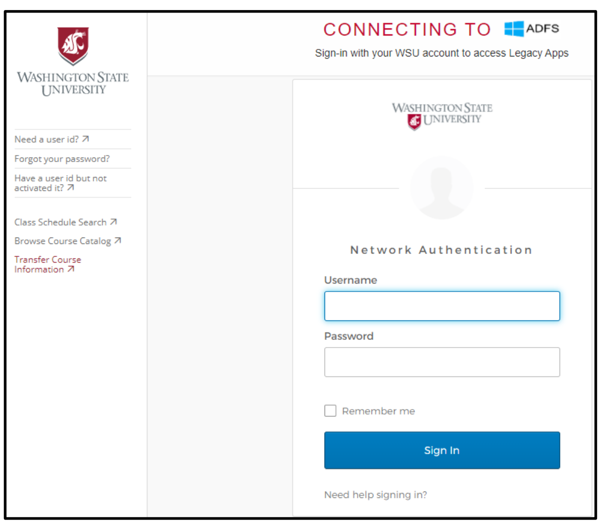


Figure 2 Login Screen

Once logged in, the user's Client Home Page displays *(Fig. 3*).

NOTE: If there is no activity for two hours, the WSU E-Forms System automatically logs out the user (client).

CLIENT HOME PAGE

The Client Home Page is the starting point for all WSU E-Forms-related activities. It displays the login name for the current user and displays all e-form templates and classifications that may be selected and opened by the user.

The Client Home Page consists of the following four sections that are separated by red tabs:

- Open
- Options
- Find Templates
- Search Records

All the functions necessary for E-Forms System users (clients) to process e-forms in the system are found under the Open tab.

The Find Templates and Search Records functions are for *administrative use only*.

Form Classifications

E-Forms are organized in template lists within named classification folders. Every user has the following folders:

- Favorites – A list of form templates optionally placed in the classification folder by the user.
- My Draft Forms – A list of the incomplete e-forms saved by the user (see Save Draft).
- My Completed Forms – A list of all finalized e-forms created by the user.
- Workflow – The user's Personal Inbox for receiving e-forms from other E-Forms System users.

  If a user is authorized to open and edit forms submitted to a workgroup that finalizes e-forms, the Group Inbox that they have access to is also located in the Workflow folder (see Workflow Folder).
- All Forms – A list of all the form template groups available in the system.
- Shipping and Mailing – The Request to Ship Merchandise (RSM) form template.

E-Forms Templates

The following e-form templates are currently available in the system:

- Request for Shipment of Merchandise | WSU 1212
- Sponsored Project Activity Request | WSU 1326 (*view legacy only*)
- Travel Expense Voucher | WSU 1005 (*view legacy only*)

E-Forms Templates (cont.)

Click on a classification folder to view the corresponding list of e-form templates in that folder. The list of templates available in the folder displays in the center window under Form Templates in Classification/Search Results.

NOTE: There is only one template available in some classification folders. (Refer to the bulleted list of folders above and *Fig. 3*.)

Click on an e-form template name from the center window to activate the first three Action Buttons on the right side of the Client Home Page. *(Fig. 3)*.

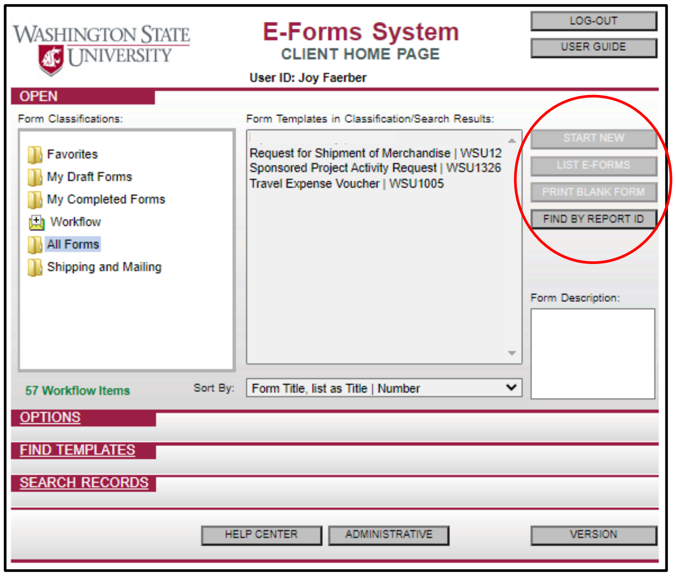


Figure 3 Form Template Action Buttons

Empty Classification Folder

The Form Templates in Classification/Search Results displays ((((Empty Folder)))) if the highlighted classification folder does not contain any e-form templates.

Action Buttons

The following three buttons are activated when an e-form template is highlighted:

- **Start New** (launches a new editable e-form).
- **List E-Forms** (opens the List Saved E-Forms page).
- **Print Blank Form** (creates a blank PDF form).

Starting a New E-Form

The WSU E-Forms System forms are fillable HTML electronic forms (e-forms) that look just like the corresponding WSU hardcopy forms. Perform the following steps to create a new e-form:

1. Highlight the desired Form Classification folder, then
2. Highlight the desired E-Form Template, then
3. Click on **Start New**.

NOTE: The **Start New** button is not available from the My Completed Forms and Workflow folders.

IMPORTANT: The Sponsored Project Activity Request and Travel Expense Voucher e-forms are no longer created in the E-Forms System. Use these templates *only* to list existing legacy forms already in this system.

List E-Forms

Click on **List E-Forms** to display the List Saved E-Forms page. The list of e-forms varies depending on which classification folder and e-form template is highlighted when the user clicks on **List E-Forms**.

For example, to display the list of all of the completed Travel Expense Voucher forms perform the following steps:

1. Highlight the My Completed Forms folder.
2. Highlight the Travel Expense Voucher | WSU1005 Form Template name in the center window of the Client Home Page.
3. Click on **List E-Forms** *(Fig. 4)*.

The List Saved E-Forms page then lists all of the user's saved draft forms for the Travel Expense Voucher. Refer to List Saved E-Forms Page.

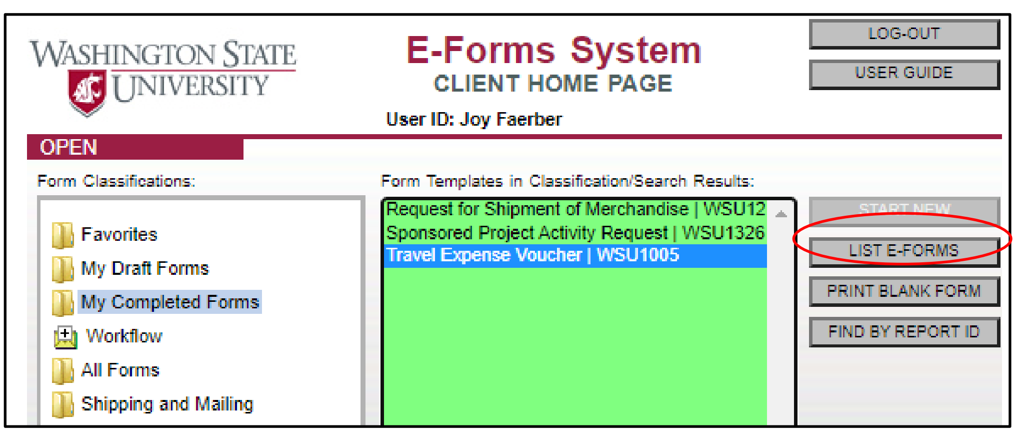


Figure 4 Select a Form Template Group for Listing

Print a Blank Form

All the WSU E-Forms System templates are also available as PDF files. Click on **Print Blank Form** to create a PDF file of the e-form template to print and fill in manually or save for future use.

NOTE: The PDF files are *not* electronically fillable.

Find by Report I.D. Button

The **Find By Report ID** button is located below the three action buttons on the Client Home Page. The **Find By Report ID** button enables the user to search for any Report ID or Request No. in the system and view the workflow report for that e-form. (See Workflow Reports).

WORKING WITH E-FORMS IN THE SYSTEM

Changes or additions may be made to an e-form only when it is in edit mode (see Editing E-Forms).

Unique E-Form Identifier

All e-forms have a unique identifying number that is not found on WSU hardcopy forms. The E-Forms System assigns a sequential number to every new e-form that is created. The number is found in the upper-right corner of each e-form. This unique identifying number is labeled Request No. on the RSM, and Report ID on the SPAR and TEV.

IMPORTANT: The Request No. / Report ID is the best way to track an e-form in the System. It is *highly recommended* that users make note of the number when starting a new e-form.

Navigating Through an E-Form

Click on any input field to navigate through an e-form or use the **Tab** key to move through the fields in reading order. The active field displays a green background.

Required Form Fields

Required fields in each e-form display a yellow background. Required fields must be filled-in before an e-form can be sent through workflow.

TRAVEL EXPENSE VOUCHER E-FORM

Travel expenses are submitted using the Expense Report business process in Workday. Travel Expense Vouchers in the E-Forms System are available *for viewing and printing only* until the end of the stated retention period.

SPONSORED PROJECT ACTIVITY REQUEST E-FORM

Sponsored Project Activity Requests are submitted using the Create Sponsored Account Request business process in Workday. Sponsored Project Activity Requests in the E-Forms System are available *for viewing and printing only* until the end of the stated retention period.

REQUEST FOR SHIPMENT OF MERCHANDISE E-FORM

Start a new Request for Shipment of Merchandise (RSM) e-form from the Client Home Page (see Starting a New E-Form).

Refer to *BPPM* 80.15 for instructions on completing the RSM form.

Required Fields

The RSM includes the following required fields:

- Business name, address and telephone fields
- Ship via (must select one option)
- Hazardous materials (must select yes or no)
- Name of sending department

Authorization of the E-Form

The RSM form requires only one signature. Click on **Sign Form** to populate both the Authorized Name and Authorized Signature fields with the user's name and digital signature.

BOTTOM NAVIGATION FRAME

At the bottom of the browser window a second window frame holds a series of buttons used to manage an e-form *(Fig. 5)*.

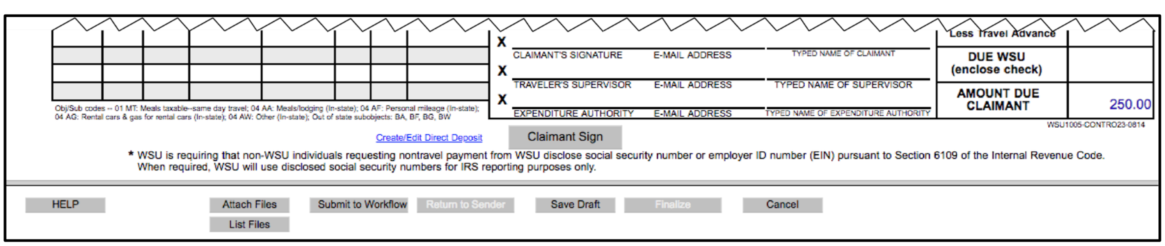


Figure 5 Navigation Buttons to Process E-Forms

Bottom Navigation Frame (cont.)

The button functions are as follows:

Help – Open the help documentation for the current form template. *(Note: The Help documentation is currently unavailable.)*

Attach Files – Attach an external file (e.g., scanned image, PDF, etc.) to the e-form.

List Files – Show all of the files attached to the e-form.

Submit to Workflow – Send the e-form to another user or Group Inbox (see Workflow).

Return to Sender – Return the e-form to the person who sent it to you.

Save Draft – Save the e-form for later editing.

Finalize –*This button is used only by administrative offices responsible for providing final approvals.*

Cancel – Return to the classification folder without saving the e-form.

Using the Bottom Frame Buttons

Attaching Files

Supporting documentation may be uploaded as an attachment to any e-form. Files no larger than 150 MB in any format may be uploaded. There is no limit on the number of files that may be uploaded. Word documents, image files, or PDF files are the most commonly used formats.

Two or more receipts may be scanned to one 8 ½ X 11 page, and any number of pages may make up one file. All images and text in the file *must* face upward to avoid the need to rotate pages in order to be legible.

Filename Requirements

Name the file with alphanumeric characters *only* and no spaces in the filename. EXCEPTION: An underscore may be used in the filename (e.g., hotel_receipt.pdf)

NOTE: Attachments with filenames that contain spaces or special characters often cannot be opened by other users or may create multiple copies of the same.

Uploading Attachments

Click on **Attach Files** in the bottom navigation frame to activate the Upload Form window *(Fig. 6)*. Click on **Choose File** to select the file to upload. Rename the file if needed, then click on **Upload**. Repeat the process for each attachment that needs to be uploaded.

NOTE: The e-form needs to be either saved as a draft or sent through workflow for the uploaded file(s) to stay attached. The Upload Form window indicates that an e-form is not saved by displaying an asterisk before the attachment filename (*Fig. 7*).

Viewing List of Attachments

The **List Files** button activates when at least one attachment has been uploaded to an e-form. Clicking on the List Files button displays an Attachment List window (*Fig. 7)*.

A user may open or delete any of the attachments in the list, using the buttons at the bottom of the Attachment List window.

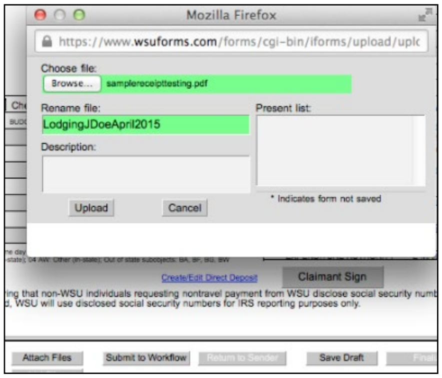


Figure 6 Attach Scanned Files

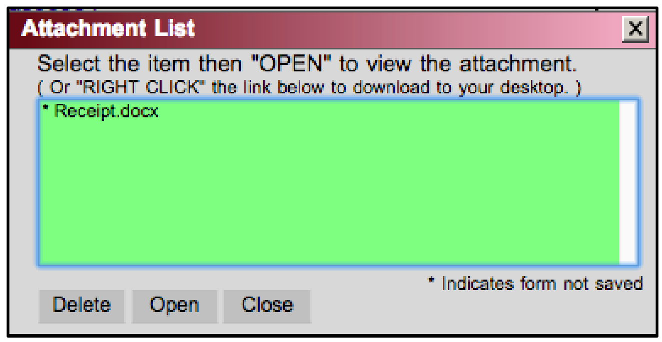


Figure 7 Attachment List

Save Draft

Users may want to save a draft of an e-form to complete at a later time, use as a template, or print a hardcopy. Click the **Save Draft** button to save an e-form in the Draft Forms folder.

E-Form Templates

TIP! Users often need to create e-forms that contain the same information (e.g., a parcel that is shipped to the same location on a regular schedule). In cases like this, the user may save a partially filled e-form in the Draft Forms folder as a template.

Each time a new e-form is needed that contains the commonly-used information, the user makes a copy of the template. The copy contains all the information contained in the template, but it has a new Report ID or Request No. (Refer to Copying E-Forms.)

Printing an E-Form to Process Manually

When processing e-forms that are not finalized electronically, click on **Save Draft** to save the filled-in e-form. From the List Saved E-Forms page, highlight the e-form and click on **Print Form** to print a PDF hardcopy. Route the printed PDF file for signatures and finalization.

Return to Sender

Depending on individual department processes, e-form recipients may want to return an e-form to the sender. The e-form may be returned to the sender through the workflow process (see Workflow). However, clicking on **Return to Sender** sends the e-form directly back to the sender without the need to enter their username or email in the system.

Return to Sender (cont.)

NOTE: The function behind the Return to Sender option sends the e-form back one step in the workflow process. Therefore, if the original sender sends an e-form to a recipient from their Draft Forms folder, the e-form returns to the sender's Draft Forms folder when the recipient sends the e-form back using the **Return to Sender** button. Likewise, if the original sender sends an e-form to a recipient from their Personal Inbox, the e-form returns to the sender's Personal Inbox when the recipient sends the e-form back using the **Return to Sender** button.

Finalizing an E-Form

The administrative office responsible for providing final approval clicks on **Finalize** to complete the form process. After an e-form is finalized, it automatically moves to the originator's Completed Forms folder.

The finalization process applies to e-forms that include full electronic processing. If a hard copy of an e-form is printed to be processed manually, the finalization step is not used in the E-Forms System.

WORKFLOW

Inbox Workflow Page

Click on **Submit to Workflow** to send an e-form to a specific recipient's Personal Inbox or a Group Inbox. Clicking on **Submit to Workflow** opens the Inbox Workflow page *(Fig. 8)*.

Send the e-form to the Personal Inbox of an individual user or to a Group Inbox from the Inbox Workflow page.

Send to Personal Inbox

Enter the recipient's WSU network I.D. or email address in the left field and then click on **Add**. The recipient's network I.D. appears in the right Selections box and the **Submit to Workflow** button at the bottom of the window becomes active (*Fig. 9)*. Click on **Submit to Workflow** to finish the process of sending the form to the recipient.

IMPORTANT: The system allows users to add more than one recipient in the Selections box. However, it is *highly recommended* that users send an e-form to only one recipient. E-forms cannot be opened and viewed by more than one user at a time.

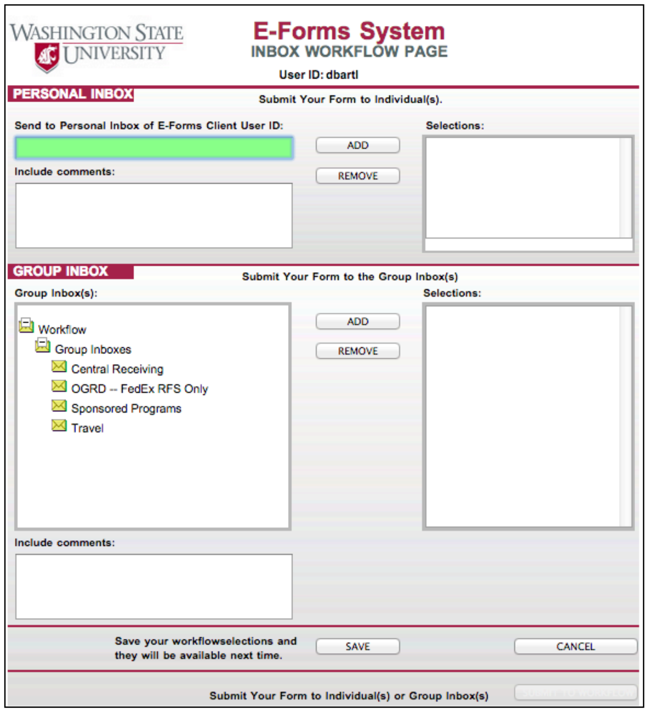


Figure 8 Send Filled-In E-Form to Another User or Group

Send to Group Inbox

Send a filled-in e-form to a Group Inbox when the form is ready to be finalized. By default, all users have access to the Central Receiving group inbox.

Highlight the Group Inbox name in the left field and then click on **Add**. The Group Inbox name appears in the right Selections box and the **Submit to Workflow** button at the bottom of the window becomes active *(Fig. 9)*. Click on **Submit to Workflow** to finish the process of sending the e-form to the group.

Save Workflow Selections

The **Save** button, located at the bottom of the screen on the Inbox Workflow page automatically saves a workflow selection in the Selections box.

To save a workflow selection, add the individual or group selection to the Selections box, then click on **Save**. The workflow selection then automatically appears in the Selections box on the Inbox Workflow page every time the user sends an e-form through workflow.

To remove an automatic workflow selection, highlight the workflow selection in the Selections box, click on **Remove**, then click on **Save**.

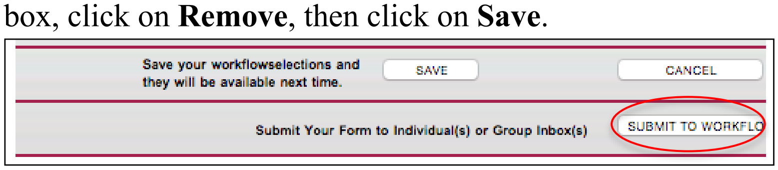


Figure 9 Click on [Submit to Workflow] Button

Save Workflow Selections (cont.)

NOTE: A workflow selection should only be saved in the rare case that a user sends e-forms to the same individual or group *every time* they use the system.

Workflow Folder

Personal Inbox

When a user sends an e-form through Workflow, the e-form recipient receives an email notification that the e-form is available in their Personal Inbox that is located within the Workflow folder on the Client Home Page. The recipient opens the Workflow folder to access the Personal Inbox. When one or more e-forms are available in the recipient's Personal Inbox, the folder text appears in bold and shows the number of e-forms available in parentheses (*Fig. 10* indicates the Personal Inbox contains one e-form).

LIST SAVED E-FORMS PAGE

WSU E-Form System users are likely to need to recall some of the e-forms at some point to perform any of the following functions:

- Continue filling a draft form.
- Print a copy of a filled form.
- Start a new form from a copy of a previously filled form.

To list e-forms, select the desired form template on the Client Home Page and click on **List E-Forms**. This option may be accessed from any form classification folder.

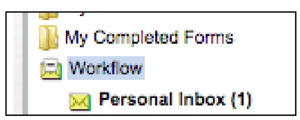


Figure 10 Form Is Available in Personal Inbox

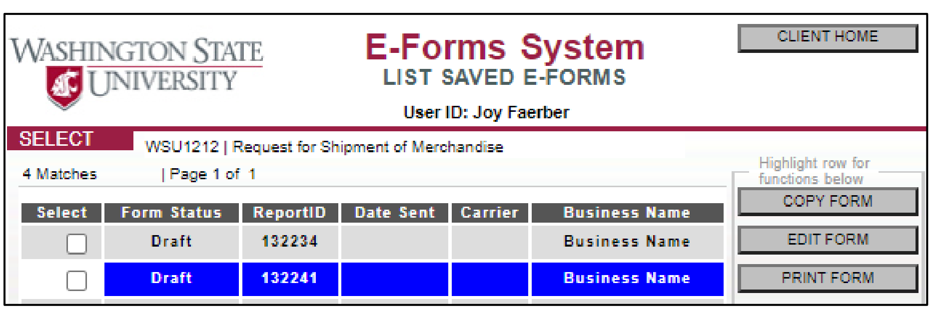


Figure 11 Select a Form Record for Editing

List Saved E-Forms Page (cont.)

Click on any of the text in a form row in the list, which highlights the row in blue. This activates the **Copy Form**, **Edit Form**, and **Print Form** buttons on the upper right side of the window.

Editing E-Forms

Highlight an e-form record from the list to edit *(Fig. 11)*, then click on **Edit Form**.

Complete the form fields as needed, then go to the bottom frame and click on **Save Draft** to save the e-form for further editing, or click on **Submit to Workflow** to send it to another user for their input or approval *(Fig. 5)*. (See Using the Bottom Frame Buttons).

Copying E-Forms

The Copy Form option may be used to create a new e-form that already contains often-used information, (i.e. a common travel itinerary). To copy an e-form, highlight the e-form record in the e-forms list and click on **Copy Form**. A new e-form appears that contains the same information as the copied e-form, but it has a new Report I.D. / Request number. Update the necessary information in this new e-form and route it as needed.

TIP: If the same travel itinerary is often-used, the originator may enter the travel information that does not change on a new e-TEV, then save it in their Draft Forms folder to use specifically as a template to copy.

Printing E-Forms

Click on **Print Form** to open a PDF file of the e-form to download or print from within the browser.

Selecting Multiple E-Forms

Print List or Export Multiple E-Forms

Click on one or more checkboxes in the Select column to activate the **Print Selected**, **Print List**, and **Export List** buttons on the lower right side of the window. The **Select All** button at the top of that group of buttons is always active. (*Fig. 12*).

Print Selected

The **Print Selected** button creates a PDF of only the first selection in the list. *NOTE: It does not create a PDF of all the e-forms when more than one is selected.*

Print List

The **Print List** button creates a list of all the selected e-forms that includes pertinent information for each e-form (*Fig. 13*).

Export List

The **Export List** button creates a .csv file that opens in Excel.

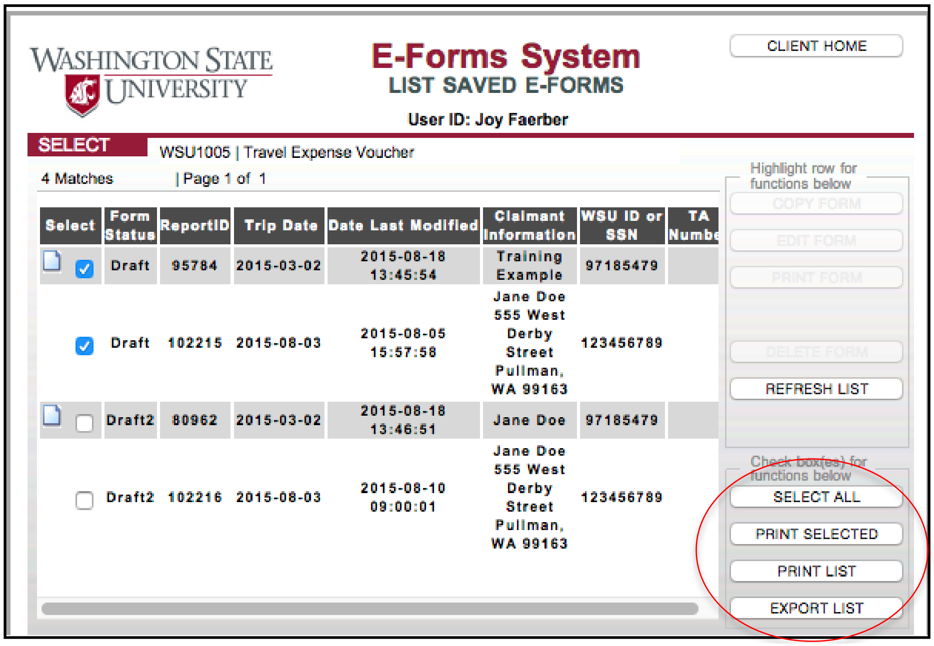


Figure 13 Select Multiple E-Forms

Figure 12 Print List

Searching E-Forms

Use the Search List features at the bottom of the List Saved E-Forms page to search within the list of e-forms *(Fig. 14)*.

NOTE: The e-form originator may use the List E-Forms option to find the location of a form in workflow (see Review Current Recipient of Workflow Item).

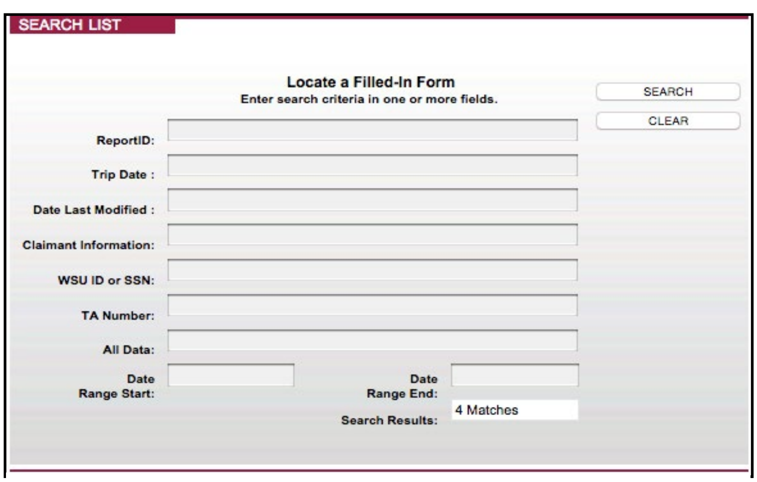


Figure 14 Search the List of E-Forms

WORKFLOW REPORTS

Review Current Status of Workflow Item

Review the entire workflow process for a particular e-form by searching on the unique Report ID / Request No. of a form.

To find the Report ID or Request No. of a form, go to the Client Home Page and select the desired form template from the All Forms or applicable subject folder (e.g., the Travel folder), then click on **List E-Forms**. In the list of forms, note the Report ID / Request No. associated with the e-form.

Navigate back to the Client Home Page and click on **Find By Report ID** *(Fig. 15)*. The **Find By Report ID** button opens the Display Report page, which enables the user to search for any Report ID or Request No. in the system and view the workflow report for that e-form.

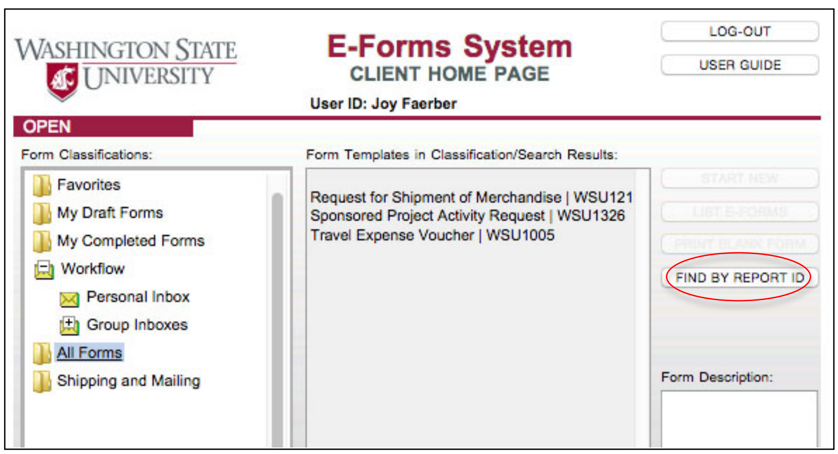


Figure 15 Find an E-Form Using the Report ID

Enter the Report ID / Request No. (e.g., 102527) and click on **Find Report** on the Display Report page (*Fig. 16*). When the report is found click on **Display WF Report** to view the complete workflow report for the e-form.

NOTE: The **Display Report** button above the **Display WF Report** button opens the e-form as a PDF file. This option is available *only* to the originator of the e-form.

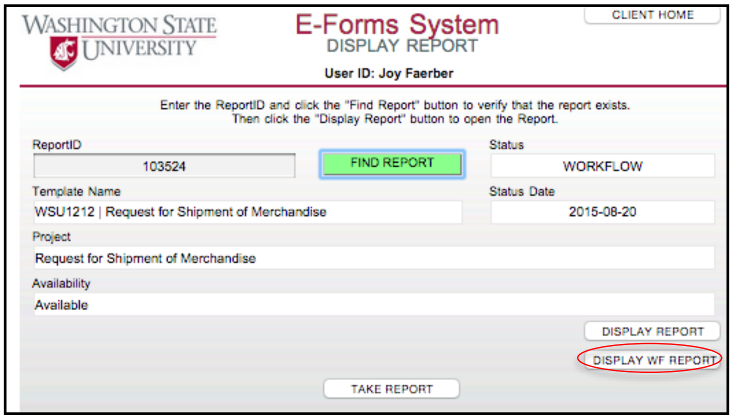
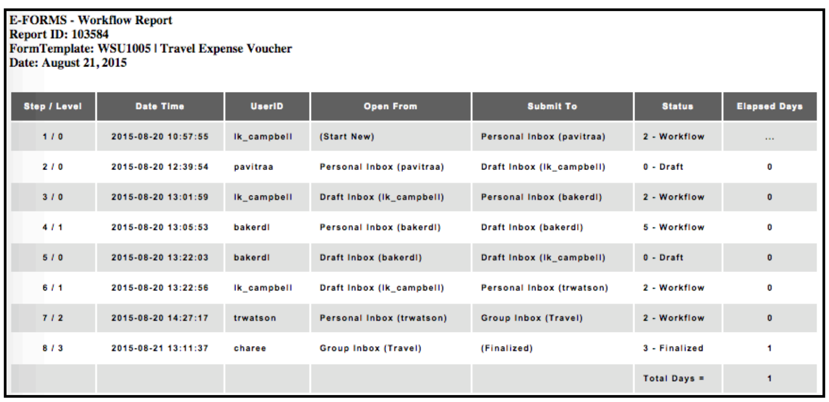


Figure 16 Display Report Page

Review the **Open From** and **Submit To** column entries in the Workflow Report to see where the e-form is currently located *(Fig. 17)*. The **Submit To** column entry is where the e-form currently resides. The Open From column entry shows the previous location of the e-form (where it was sent from).

If the **Submit To** entry displays (Finalized), it is currently in the e-form originator's Completed Forms folder.



E-FORMS - Workflow Report
Report ID: 103584
FormTemplate: WSU1005 | Travel Expense Voucher
Date: August 21, 2015

Step / Level	Date Time	UserID	Open From	Submit To	Status	Elapsed Days
1 / 0	2015-08-20 10:57:55	lk_campbell	(Start New)	Personal Inbox (pavitraa)	2 - Workflow	...
2 / 0	2015-08-20 12:39:54	pavitraa	Personal Inbox (pavitraa)	Draft Inbox (lk_campbell)	0 - Draft	0
3 / 0	2015-08-20 13:01:59	lk_campbell	Draft Inbox (lk_campbell)	Personal Inbox (bakerdl)	2 - Workflow	0
4 / 1	2015-08-20 13:05:53	bakerdl	Personal Inbox (bakerdl)	Draft Inbox (bakerdl)	5 - Workflow	0
5 / 0	2015-08-20 13:22:03	bakerdl	Draft Inbox (bakerdl)	Draft Inbox (lk_campbell)	0 - Draft	0
6 / 1	2015-08-20 13:22:56	lk_campbell	Draft Inbox (lk_campbell)	Personal Inbox (trwatson)	2 - Workflow	0
7 / 2	2015-08-20 14:27:17	trwatson	Personal Inbox (trwatson)	Group Inbox (Travel)	2 - Workflow	0
8 / 3	2015-08-21 13:11:37	charee	Group Inbox (Travel)	(Finalized)	3 - Finalized	1
					Total Days =	1

Figure 17 Workflow Report

TIP: If the Open From entry and Submit To entry display the same network ID name, it is likely that the sender failed to click on **Submit to Workflow** on the Inbox Workflow Page to confirm sending the e-form to the next recipient (*Fig. 9*).

Review Current Recipient of Workflow Item

An e-form originator may review the last user or group to whom an e-form was sent in Workflow.

From the Client Home Page, select the desired e-form template from the All Forms or the Shipping and Mailing folder, and click on **List E-Forms**.

When the originator holds the cursor over the Form Status for an e-form, the name of the e-form and the e-mail address of the recipient's inbox appears in a pop-up window *(Fig. 18)*.

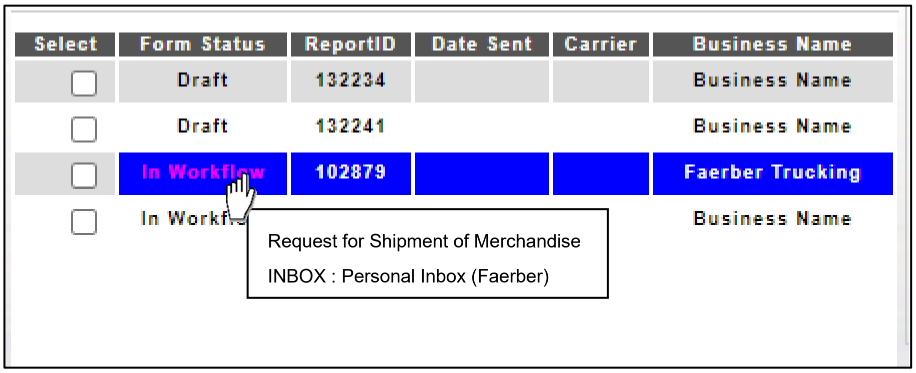


Figure 18 Form Status box

TROUBLESHOOTING

Problem	Solution
Attachments	
System creates numerous copies of a single file attachment.	Remove all the attachment copies. *(For assistance with removing very large quantities of attachments, contact the Procedures, Records, and Forms office.)* Rename the attachment file using only alphanumeric characters and no spaces, then reattach it to the e-form. If the attachment file is correctly named, and the system still creates numerous copies, the e-form is likely corrupt and a new one should be created. See Filename Requirements.
E-form attachment cannot be viewed.	The attachment may have become corrupt. The originator should remove the corrupt file and rescan and upload the attachment again. Ensure the attachment filename contains no spaces or special characters.
Bottom Frame	
The buttons at the bottom of the e-form are not showing.	The E-Form System browser window is split into two "frames," and the buttons reside in the bottom frame. Be sure the browser window is not in full screen mode, then drag the bottom of the screen up a bit by moving the cursor over the bottom frame dividing line and dragging the line up. The bottom frame that contains the buttons appears. You may need to scroll the bottom frame up or down a little to view the buttons.
Error Messages	
The error message "form is locked" displays when trying to open an e-form.	Logout and close the browser, then wait **two** hours for the system to unlock the form. Clear the browser cache (history and cookies) before logging back in to the system. To help avoid this issue, use the E-Forms System navigation buttons, rather that the browser back button to move to a different page in the system.
The error message "Form window is blocked!" displays when trying to open an e-form from the List Saved E-Forms page.	Enable pop-ups in the browser settings.
A message appears stating "Did not pass form level validation. Not saved yet." when trying to submit the e-form to workflow.	A required form field is not filled in. See Required Form Fields. The **Net Effect** field in an e-SPAR form does not equal zero.
A "thank you" message displays when trying to add attachments to an e-form.	- Enable pop-ups in the browser. - Delete the browsing history. - Use a different browser.

TROUBLESHOOTING (cont.)

Workflow	
The **Add** button is grayed out when trying to select a Group Inbox on the Inbox Workflow page.	Remove any individual users from the Selections box in the Personal Inbox area of the page. The system does not allow e-forms to be sent to individuals and groups simultaneously.
An individual or group selection automatically appears in the Selections box on the Inbox Workflow page.	Remove the individual(s) or group from the Selections box by using the **Remove**. Then click on the **Save** button at the bottom of the window. See Save Workflow Selections.
An e-form was sent to a person who is no longer a WSU employee.	Contact the Procedures, Records, and Forms office; telephone 509-335-2005, or e-mail prf.forms@wsu.edu.

RESOURCES

E-Form System users may download a frequently asked questions list to use as a quick desktop reference.

https://policies.wsu.edu/prf/documents/2017/08/e-forms-faq.pdf/