• Advantages of electronic processing

• Sign in procedures

• How to sign and route a form
Advantages

- Faster processing and faster claimant reimbursement
- More accurate data entry and calculation, thus fewer errors
When someone generates an electronic Travel Expense Voucher that involves you as claimant, supervisor, or expenditure authority, you will receive an email notification telling you that you have a form to review and sign. The notification includes a link to the Electronic Forms Home Page that includes an access link to the E-Forms System.

Workflow Notification
E-FORMS SYSTEM ACCESS

To access the e-forms system go to:
http://public.wsu.edu/~forms/eforms.html
Click either location to access the log-in page.
To sign into the E-Forms System enter your Network User ID and password.

System Sign In
When you open the client home page you will have workflow items in your personal inbox. To access your personal inbox, click on the + (plus) sign in front of “Workflow.”

Workflow
After making the personal inbox visible, highlight personal inbox and the form template. The forms in the inbox may then be listed by pressing “List E-Forms.”

Workflow
Highlight the desired form by clicking on any form field and then press “Edit Form” to open it.

Workflow
Note the claimant signature box at the bottom-center of the form.
The claimant electronically signs the form after reviewing it. The claimant signs by clicking the “Claimant Sign” button. The claimant’s signature locks most fields on the form. (The account coding information and Controller’s Office fields are not locked.) Locked fields cannot be changed unless the signature is removed.
Many departments have one individual originate and route forms using workflow as shown above. In such cases, the approver only needs to press the “Return to Sender” button to finish processing the form and send it back to the originator. The originator sends it to the next approver and eventually to Travel.
After signing, the claimant can either submit the form to workflow or return it to sender, depending on departmental practices.

**Workflow Recipient**
After the claimant signs, the form is routed to the supervisor and expenditure authority. Sometimes both roles are assumed by one person. In such cases, one person can sign as both by clicking both signature buttons. After signing, each recipient can either submit the form to workflow or return it to sender.

**Workflow Recipient**
If a reviewer wants to submit the form directly to another employee to review and sign the form, the form must be submitted to workflow. Click the “Submit to Workflow” button below the form.

**Workflow**
Enter the Network User ID or complete email address of the intended workflow recipient and then press the “Add” button. Pressing the “Add” button enters the recipient’s Network ID information into the “Selections:” box. You may enter comments for the recipient in the “Include comments:” box.

Workflow
Workflow

The “Add” button has been pressed and a recipient selected.

NOTE: An intended workflow recipient must have previously signed in to the system before you can send workflow to him or her.
At the bottom of the workflow page, press the “Submit to Workflow” button to send an email workflow notification to the next reviewing individual.
When all signatures have been obtained and the form is ready to send to Travel Services, the Group Inbox for Travel is selected and added to the selections. The form is submitted to workflow just as with the other recipients.

Travel reviews the form and either returns it for corrections or finalizes it.

**Workflow to Travel**
If during any part of the workflow process you wish to retain a copy for later reference, save the form to your draft folder, open the draft folder, highlight the form, and click on “Print Form” to make a PDF copy that you can file. You can simply save the PDF copy to your hard drive or other digital storage device.

PDF Reference Copy
• You should now know how to sign into the E-Forms System.
• You should be able to receive workflow and act upon it.
• You should be able to save PDF reference copies.
Questions?

- Contact your office’s support personnel or the Office of Procedures, Records, and Forms if you have problems with the E-Forms System or require further instruction.
- Email prf.forms@wsu.edu
- Telephone 509-335-2005