• Description of WSU e-forms system
• Sign in procedures
• How to start, complete, and route a form
• How to attach scanned receipts and attachments
• Form tracking
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.
Enter your Network User ID and password.

**System Sign In**
At the Home Page, select the form classification you want to view. Select the form template you want to use, e.g., Travel Expense Voucher or Request for Shipment of Merchandise. (Note: Only system administrators have access to the Input Table Utility form template.)
Highlight the form template you want to access and click on “Start New.”

Home Page
Enter data into the fields as you would with any other automated form.
Be sure to enter the start date of trip. The rate fields are programmed to check this date to apply the correct rate.
When you get to the meal rate section of the TEV, enter the name of the city and double click. You will get a query box. Highlight the correct city in the list and double click again. The correct rate for the city will be entered.

Rates Query Box
Another way to obtain rates is to simply double click with the cursor in the appropriate blank location box. That will bring up the query box. You can enter search criteria for your meal location. After selecting search, the desired city or locality will appear. Highlight the city or locality and double click again. The correct meal rate will be entered.

**Rates Query Box**
You may also use the query box to look up room rates, however you must manually enter the correct room rate including any taxes. The room rate plus the taxes will likely make the total more than the allowable rate. If you get a popup concerning the amount entered exceeding the allowable amount, simply cancel it and move on. If the actual rate (not including taxes) is more than the allowable amount, you will need to enter an exception number below. (See next screen.)
If the room rate (not including taxes) exceeds the allowable amount, you will need to claim an exception to the maximum room rate. Check the exception box and then move the cursor to the “Rule No.” box and select the correct exception number.

**Room Rate Exceptions**
Receipts are required for lodging and certain other expenses. Receipts must be scanned and uploaded. Select “Attach Files” at the bottom of the screen and browse for your scanned file of the receipt. Press “Upload” to attach the receipt file. NOTE: If renaming a file, include no spaces or special characters in the name.
• Make sure that the scanned receipt is clear and legible.
• Do not scan the receipt at the highest resolution. Receipts scanned at the highest resolution result in large files that are difficult to upload and occupy excessive storage space. Try to keep file size below 500 kb.
• The submitting department is responsible for retaining paper originals of the scanned receipts for the full retention period of the Travel Expense Voucher, usually six years after the end of the current fiscal year.

Attached Receipts
After the form is completed the Claimant electronically signs. The Claimant clicks 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.
In order to request another employee to review and sign the form, the form must be submitted to workflow. Click the “Submit to Workflow” button below the form.
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 information into the “Selections:” box. You may enter comments for the recipient in the “Include comments:” box.

Workflow
The “Add” button has been pressed and a recipient selected. You may enter several recipients in the personal inbox selections field. However, it is best to send to only one recipient at a time. Workflow is tracked for the first recipient only. Also, a form opened by two or more recipients at the same time may lock and be unavailable until the system times out, which takes two hours.

NOTE: An intended workflow recipient must have previously signed in to the system before you can send workflow to him or her.

Workflow
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, select the Group Inbox for Travel and add it to the selections. Submit the form to workflow just as you did for the other recipients.

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

**Workflow to Travel**
Whenever you submit a form to workflow, the recipient receives an email notification that he or she has a form to review.

**Workflow Notification**
When the recipient opens the home page, he or she will have workflow items in his or her personal inbox. To access the personal inbox, the recipient clicks on the + (plus) sign in front of “Workflow.”

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

Recipient Workflow
Highlight the form and press “Edit Form” to open it.

Workflow Recipient
The recipient reviews the form, signs it as claimant, expenditure authority, or supervisor. After signing, the recipient can either submit the form to workflow or return it to sender.

**Workflow Recipient**
Move your cursor over the form status portion of the form listing to see the form’s current workflow location.

**Tracking Workflow**
To obtain a report of the complete workflow of a form you originated, select “Find by Report ID” on the right side of the page.

Workflow Report
Enter the form number, found in the upper right of the TEV, and select “Find Report.”
In order to see the workflow report, select “Display WF Report.”

**Workflow Report**
The workflow report shows where the form has been and where it is now.

NOTE: The simple format of the workflow report calls all repositories “Personal Inbox.” Review the “Open From” and “Submit To” entries. If “Submit To” is different from “Open From,” the form is likely to be in the recipient’s Workflow—Personal Inbox. If “Open From” and “Submit To” are the same, the form is likely In the recipient’s My Draft Forms folder.

**Workflow Report Example**
If during any part of the workflow process you wish to retain a copy for later reference, 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 eforms system.
• You should be able to access a blank form, complete it, sign it, and submit it to workflow.
• You should be able to receive workflow and act upon it.
• You should be able to track progress of a form you originated.
• You should be able to save PDF reference copies.
• Contact the Office of Procedures, Records, and Forms if you have problems with the eforms system or require further instruction.
• Email prf.forms@wsu.edu
• Telephone 509-335-2005