WSU E-Forms

Request for Shipment of Merchandise Training
Office of Procedures, Records, and Forms
• Sign in procedures
• How to start, complete, and route a form
• How to attach scanned files
• How to make reference copies

Training Overview
E-FORMS SYSTEM ACCESS

To access the e-forms system go to:
http://public.wsu.edu/~forms/eforms.html
Click either log-in link to access the log-in page.
Enter your Network User ID and password.
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.)

System Home Page
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.
Completing the Form

<table>
<thead>
<tr>
<th>SHIP TO:</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSINESS NAME</td>
</tr>
<tr>
<td>STREET NO.</td>
</tr>
<tr>
<td>CITY</td>
</tr>
</tbody>
</table>

Certain fields are required. These fields must be completed before the form can be submitted to workflow. The fields in yellow above are required, as well as “Ship VIA” and “Hazardous Materials?” checkboxes.
If necessary, attachments may be scanned and uploaded. Select “Attach Files” at the bottom of the screen and browse for your scanned file. Press “Upload” to attach the file.

## Attachments
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.

Workflow
Enter the Network User ID name 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 “Comments” box.

**Workflow**
At the bottom of the workflow page, press the “Submit to Workflow” button to send an email workflow notification to the reviewing individual.
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
After the form is completed the expenditure authority electronically signs. The signer clicks the “Sign Form” button. The signature locks most fields on the form. Locked fields cannot be changed unless the signature is removed.
In order to send the form to Central Receiving it must be submitted to workflow. Click the “Submit to Workflow” button below the form.
Select the Group Inbox for Central Receiving and add it to the selections.

Workflow to Central Receiving
After selecting the Group Inbox for Central Receiving and adding it to the selections, click on “Submit to Workflow” to route the form to Central Receiving.

**Workflow to Central Receiving**
If the shipping charges are supported by a sponsored program account (projects 11-14) and the shipment is sent by FedEx, route the Request for Shipment of Merchandise to OGRD. OGRD routes the form on to Central Receiving.

**Workflow to OGRD -- FedEx RFS Only**
Note the “Request No.” in the upper left of the form. Write this number on the shipping box near the address label. This enables Central Receiving to match the shipment with the electronic form.

Telephone Central Receiving and notify them that the shipment is ready to be picked up.
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 save PDF reference copies.
• Contact 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