WSU E-Forms

Sponsored Project Activity Request Training
Office of Procedures, Records, and Forms
Training Overview

- Sign in procedures
- How to start, complete, and route a form
- How to attach scanned files
- How to make reference copies
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

Certain fields are required. These fields are highlighted in yellow and must be completed before the form can be submitted to workflow.

In addition to the Explanation field near the bottom of the form, a Guarantee Account is required if any of the first three boxes under “This is a request to: GUARANTEE” are checked.
Completing the Form

If the “Internal rebudget of existing accounts” box is checked under “This is a request to: OTHER,” the Home Account No., From Account #, and To Account # fields are required.
When rebudgeting accounts, the net effect of the move of funds from one account to another must be zero. The Net Effect zero result is required but not highlighted on the form.

**Completing the Form**
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.

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 reviewing individual.
Workflow Notification - ReportID (51559)
dbartl@wsu.edu  
Sent: Friday, May 29, 2015 2:05 PM  
To: Bartlett, Deborah L

From dbartl@wsu.edu,

- ReportID (51559)
Please sign this form and send it back to me using the Return to Sender button. Be sure to click OK at the two subsequent confirming dialogue boxes.

This message is notification that you have a new "Sponsored Project Activity Request" E-Form in your Workflow Personal Inbox.

Office of Procedures, Records, and Forms  
https://webapps.wsu.edu/ais/wsueforms

Whenever you submit a form to workflow, the recipient receives an email notification that he or she has a form to review.
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 PI/director, department chair, or dean/director. After signing, the recipient can either submit the form to workflow or return it to sender.

Workflow Recipient
In order to send the form to Sponsored Programs Services it must be submitted to workflow. Click the “Submit to Workflow” button below the form.
Select the Group Inbox for Sponsored Programs and add it to the selections.

**Workflow to Sponsored Programs**
After selecting the Group Inbox for Sponsored Programs and adding it to the selections, click on the confirming “Submit to Workflow” to route the form to Sponsored Programs.

Workflow to Sponsored Programs
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 SPAR, and select “Find Report.”
Select Display WF Report to see a 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Level</th>
<th>Date Time</th>
<th>UserID</th>
<th>Open From</th>
<th>Submit To</th>
<th>Status</th>
<th>Endapsed Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 / 8</td>
<td></td>
<td>2012-08-03 21:57:32</td>
<td>jenks</td>
<td>(Start New)</td>
<td>Personal Inbox (jenks)</td>
<td>2 - Workflow</td>
<td>...</td>
</tr>
<tr>
<td>2 / 9</td>
<td></td>
<td>2012-08-03 22:01:03</td>
<td>darril</td>
<td>Personal Inbox (darril)</td>
<td>Personal Inbox (jenks)</td>
<td>2 - Workflow</td>
<td>0</td>
</tr>
</tbody>
</table>

### Table Listing

E-FORMS - Workflow Report
Report ID: 30150
FormTemplate: WSU1005 | Travel Expense Voucher
Date: August 03, 2012
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 E-Forms 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.

Summary
Questions?

• 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