WSU E-FORMS SYSTEM
User Guide

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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 employee users who have access to the Internet and a valid Network ID and password.

LOG IN

To enter the WSU E-Forms System, users select the following link:

WSU E-Forms System Log-In

![Figure 1: Login Screen](image)

Sign into the WSU E-Forms System with a WSU Network ID and password.

Once logged in, the user's Client Home Page is displayed.

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.

E-Forms are organized in named classification "folders." The first thing a user (client) does to find an form is to select a folder from the Form Classifications window on the left side of the Client Home Page. Clicking on a folder shows a corresponding list of Form Templates groups in the center window.

![Figure 2: E-Forms System Client Home Page](image)

NOTE: Procedures, Records, and Forms adds additional classification folders as needed when new e-form templates are published.

The Client Home Page displays the login name for the current user. The page lists all forms and classifications that can be selected and opened by that user.

The Home Page also has a Search option for assisting the user in finding forms within a large library by entering search criteria.
Every user (Client) has these folders:

- Favorites – A list of the most often used Form Templates
- My Draft Forms – A list of the user's partially filled in e-forms
- My Finalized Forms – A list of the user's completed e-forms
- All Forms – A list of all the Form Templates available to the user
- Workflow – A list of Inboxes available to the user for receiving filled e-forms from other E-Forms System users

Clicking on a Form Template group name from the center window highlights the form name and enables the [Start New] and [Print Blank Form] buttons on the right side of the Home Page. If there are any previously filled-in saved e-forms created from the highlighted Form Template, the [List E-Forms] button is also be enabled.

To launch a new fillable Form Template, click the [Start New] button.

To edit a previously filled Form Template, click the [List E-Forms] button.

To print a blank paper Form Template, click the [Print Blank Form] button.

Figure 3: Select Previously Filled Form Template From List
START A NEW FORM

The WSU E-Forms System Templates are fillable HTML electronic forms (e-forms) that look like paper forms overlayed with input fields. To navigate through an e-form, click on any field with your mouse, or use the Tab key to move through the input fields in reading order.

When selected the fields on the form display in one of two colors. Each color represents a fill property assigned to that field:

- **Green** - Identifies the active input field where the cursor is located.
- **Yellow** - Indicates that the field is “required” to be filled-in before the form can be finalized.

![Figure 4: [Start New] Button Opens a Fillable Form](image)
THE BOTTOM NAVIGATION FRAME

On the bottom navigation frame, there are a series of buttons used to process the filled e-form. The button functions are as follows:

[Help] – Open the help documentation for the current Form Template.

[Attach Files] – Attach an external file (e.g., scanned image, PDF, etc.) to this filled-in e-form.

[List Files] – Show all of the attached files associated with this filled-in e-form.

[Submit to Workflow] – Send this filled-in e-form to another user or group Inbox for more input.

[Return to Sender] – Return this filled-in e-form to the person who sent it to you.

[Save Draft] – Save this filled-in e-form for later editing.

[Finalize] – All input is complete and this filled-in e-form is finished.


Use the Bottom Frame Buttons

When all the fields are filled-in, go to the bottom frame and click the [Save Draft] button to save this filled-in form for later editing, or click the [Submit to Workflow] button if finished filling the form and ready to send it to the next reviewer or administrative office. The administrative office responsible for providing final approval selects the [Finalize] button to complete the form process. NOTE: This process applies to e-forms that include full electronic processing capability, e.g., Travel Expense Voucher.

When using e-forms that are not fully processed electronically, the user selects the [Save Draft] button when finished filling the form, prints a PDF copy, obtains the applicable signatures, and routes the signed form to the responsible administrative office.
PRINT A BLANK FORM

All the WSU E-Forms System Templates are also available as PDF form files that can be opened using the free Adobe Reader. Once a form is displayed in the Reader, the user may print hard copies to any local printer device. The user may also save the PDF file on his or her local hard drive.

The PDF files are not electronically fillable.

Figure 5: Printing a Blank Form Opens Acrobat Reader
LIST FILLED-IN E-FORMS

After the user saves filled-in e-forms into the WSU E-Form System, the user is likely to need to recall some of the forms at some point to:

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

These functions are accessed by going to the Client Home Page, selecting the desired Form Template, and clicking the [List E-Forms] button. The “My Draft Forms” folder lists the names of all of the different Form Templates have been previously opened, filled-in, and saved for later editing using the [Save as Draft] button. The user may have several draft versions saved of each Form Template listed.

EXAMPLE: To get the list of all of the draft "Travel Expense Voucher" forms, highlight the Travel Expense Voucher / WSU1005 form template group name in the center window of the Client Home Page and then click the [List E-Forms] button.
The "List Saved E-Forms" page displayed below lists all of the user's saved draft forms for the Travel Expense Voucher.

![E-Forms System](image)

**Figure 7: Select a Form Record for Editing**

Click on any of the words in a form line in the list to highlight the form (turning the line blue). This activates the buttons on the upper right side of the window, allowing the user to Copy, Edit, or Print the specific filled e-form. To Print or Export multiple filled e-forms at the same time, click the Checkboxes. To search within the list of filled e-forms, use the Search List features at the bottom of the “List Saved E-Forms” page.
EDIT FORM

Highlight a form from the list (click on a word in the form listing line to turn the line blue) to re-edit the previously filled e-form. Click the [Edit Form] button.

When all the fields are filled-in, go to the bottom frame and click the [Save Draft] button to save this filled-in e-form for later editing, or click the [Submit to Workflow] button to send this to another user for her or his input or approval.

![Fig 8](https://www.wsuforms.com/forms/cgi-bin/forms/wsuv1_1_4/mlForms_wsuv1_ml.cgi)

**Figure 8: After Editing Choose an Option for Saving From Bottom Frame**

In the case of e-forms set up for full electronic processing, the responsible administrative office selects the [Finalize] button after completing final approval of the form. In the case of e-forms that are not fully processed electronically, the user selects the [Save Draft] button when finished filling the form, prints a PDF copy, obtains the applicable signatures, and routes the signed form to the responsible administrative office.
OTHER SECTIONS OF THE CLIENT HOME PAGE

The Client Home Page has three collapsible sections for special functions:

![Figure 9: Three Collapsible Sections](image)

OPTIONS

The Options section provides the following user options:

- The [Favorites] buttons allow the user to Add and Remove form template names from the user's Favorites folder. By default, the Favorites folder form templates are displayed in the center form list window when the user logs into the E-Forms System. Click the [Favorites: Add] button to place a highlighted Form Template name into the Favorites folder. Click the [Favorites: Delete] button to remove a highlighted Form Template name from the Favorites folder.

- The [Suggestion Box] button is for the user to make recommendations or criticisms about the WSU E-Forms System to the Office of Procedures, Records, and Forms. These suggestions are anonymous unless the user chooses to identify himself or herself.

- The [Form Info] button displays historical and document management information about the highlighted Form Template, such as the version number.

- There is also a [Client Profile] button for the user to view common identity information (Last Name, First Name, E-Mail Address, etc.) auto-entered from the WSU Active Directory (Network ID/Password system). NOTE: WSU users are strongly advised **not** to edit the Client Profile.
FIND TEMPLATES

The WSU E-Forms System may eventually have over one hundred Forms Templates in dozens of Classifications, so this section is provided for users to search for a Forms Template from the repository.

Key in anything known about a Form Template and the Forms List displays the matches. Once the user finds the desired Form Template, the user may open it or add it to the Favorites folder (if frequently needed).

![Find Templates](image)

**Figure 10: Locating a Template**

To search for forms, the user enters information in one or more of the search criteria fields and clicks the [Find] button. The search results list will display all forms that match the criteria.

To clear the list, click [Clear] button.

**Form Number/Name:** The first field is for locating a form by its Form Number; the second is for locating a form by its Form Name. The wild card character (*) may be used within these fields.

**Key Word(s) in Form Info:** This searches through the Form Description for any key words entered into this field. The wild card character (*) may be used within this field.

**Asterisk (*) Wild Card:** The asterisk (*) character is used as a wild card to mean "any other characters." A user may enter the wild card character when the entire Form Number or Form Name is not known. For example: The user knows the number starts with "65." The user inputs the Form Number as "65*." The program then lists all forms starting with "65." If the Form Number ends with "54," the user inputs "*54."

The asterisk can be used before and after words to mean "any Form Name that has the letters shown." For example: Searching for "*work*" finds both "Work Schedule" and "Worksheet."

*Note: All searches ignore the difference between upper and lower case characters.*
SEARCH RECORDS

Every time any user saves, submits, or finalizes a filled-in e-form, a data record is created or updated. The Search Records section provides an easy way to search through the database of filled-in e-forms to find the form needed.

To find all the filled e-forms records that have specific data, key in the desired criteria and click the [Search] button. If any matches are found, the field labeled “Search Results” shows a record count. Click the [Display] button to show the list of e-forms with matching data, as shown below:

![E-Forms System](image.png)

Figure 11: Locate Form by Entering Search Criteria on Bottom Frame

Now you can highlight a record to copy, print, or export.
**WORKFLOW**

**SIMPLE WORKFLOW**

Every E-Forms System user (Client) has a Personal Inbox that can be used for Simple Workflow. When one user needs to send a filled e-form specifically to another user for additional input, it can be sent via the [Submit to Workflow] button to the other user's Personal Inbox. The [Submit to Workflow] button is located on the bottom navigation frame of every fillable e-form.

There are no limitations on the number of times a filled e-form can be Submitted to Workflow.

![Figure 12: Inbox Workflow Page](image-url)
WORKFLOW INBOXES

When a user goes to the E-Forms System Home Page and expands the Workflow folder, he or she sees a list of Inboxes. If there are any filled e-forms waiting for the user to act on, a notice appears under the Classifications window on the left side of the Home Page.

Some users also have one or more named Group Inboxes to which many other users also have shared access. (Group Inboxes are set up only for administrative offices that finalize forms.) When one user needs to send a filled e-form to an administrative office (e.g., Travel) to complete the form process, the user sends the e-form via Workflow to a Group Inbox. Any authorized user with access to the named Group Inbox can open and edit any filled forms that are sent to that Inbox.

![Workflow Items Pending](image)

**Figure 13: Workflow Items Pending**
REVIEW CURRENT RECIPIENT OF WORKFLOW ITEM

The form originator may review the last user or group to whom a form was sent in workflow.

Go to the E-Forms System Home Page and expand the All Forms or applicable subject folder (e.g., the Travel folder). Select to highlight the form template group name and select the [List E-Forms] button.

The form originator locates the form to review by examining the identifying information that appears in the Select window. When the originator holds the cursor over the Form Status for a form, the name of the form and the e-mail address of the recipient's inbox appears in a pop-up window.

Figure 14: Reviewing Recipient of Item Sent in Workflow
WORKFLOW REPORTS

The form originator may review the entire workflow process for a particular e-form.

Go to the E-Forms System Home Page and expand the All Forms or applicable subject folder (e.g., the Travel folder). Select to highlight the form template group name and select the [List E-Forms] button. Locate the form needed by examining the identifying information that appears in the Select window. Note the Report ID associated with the specific e-form. (The E-Forms System assigns a unique Report ID to each e-form created within the system.)

Go back to the E-Forms System Client Home Page. Select the [Find by Report ID] button. Enter the Report ID (e.g., 30027) and click the [Find Report] button. When the report is found, select the [Display WF Report] button to access the complete workflow report for the e-form.

![E-Forms Workflow Report](https://www.wsuforms.com/forms/cgi-bin/portal-UserldLogin-pl.cgi)

**Table Listing**

<table>
<thead>
<tr>
<th>Step / Level</th>
<th>Date Time</th>
<th>UserID</th>
<th>Open From</th>
<th>Submit To</th>
<th>Status</th>
<th>Elapsed Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 / 0</td>
<td>2012-05-14 17:42:95</td>
<td>redman1</td>
<td>(Start New)</td>
<td>(Save Draft)</td>
<td>0 - Draft</td>
<td>...</td>
</tr>
<tr>
<td>2 / 1</td>
<td>2012-05-14 18:08:48</td>
<td>redman1</td>
<td>(Save Draft)</td>
<td>Group Inbox [Travel]</td>
<td>2 - Workflow</td>
<td>0</td>
</tr>
<tr>
<td>3 / 1</td>
<td>2012-05-14 20:37:48</td>
<td>jenkins</td>
<td>Group Inbox [Travel]</td>
<td>Personal Inbox (redman1)</td>
<td>2 - Workflow</td>
<td>0</td>
</tr>
<tr>
<td>4 / 1</td>
<td>2012-05-15 16:53:34</td>
<td>redman1</td>
<td>Personal Inbox (redman1)</td>
<td>Group Inbox [Travel]</td>
<td>2 - Workflow</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total Days</td>
<td>1</td>
</tr>
</tbody>
</table>

**Figure 15: Reviewing Workflow Report**

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.
Host and Support:

OneForm Designer Plus Forms Portal
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