Salt Lake Community College
Human Resources
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eForms Originator (User) Guide

This guide will walk-thru Originator (User) actions:

- Locating an eForm.
- Completing an eForm.
- Attaching a supplemental document.
- Routing an eForm for approval.
- Submitting a completed form.
- Drafting a form to be submitted later.
- Tracking a form's status in the workflow.
- Changing and resubmitting an eForm that has been returned.
- Downloading and printing the eForm.

1) Locating an eForm:

a. Forms can be found on our HR Forms Page at http://i.slcc.edu/hr/forms.aspx

b. eForms on the website are designated by a small eForm graphic and require the originator to login using their SLCC username and password.
   i. Duo Two-Factor Authentication is required.

c. Once accessed, the eForm preview will appear on the right side of the webpage.

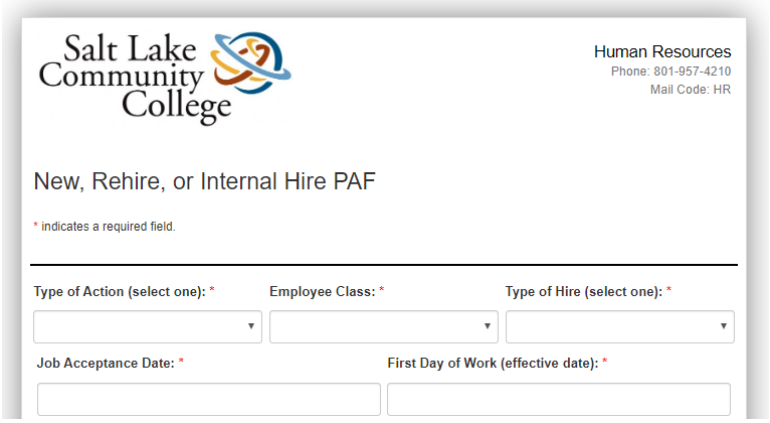

Figure 1- Example of the eForm preview.

2) Completing an eForm:

a. To complete the form, simply type in the required information or use the drop-down fields as designated by red asterisks.

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i. When submitting, if a required field is missed, the system will prompt the user with a dialogue box in the right-hand corner of the screen, and outline missed fields in red. These must be completed the form can be successfully submitted.

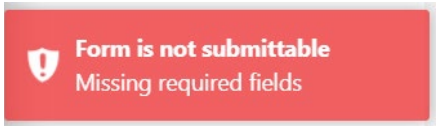

Figure 2- System error received when all required fields are not complete.

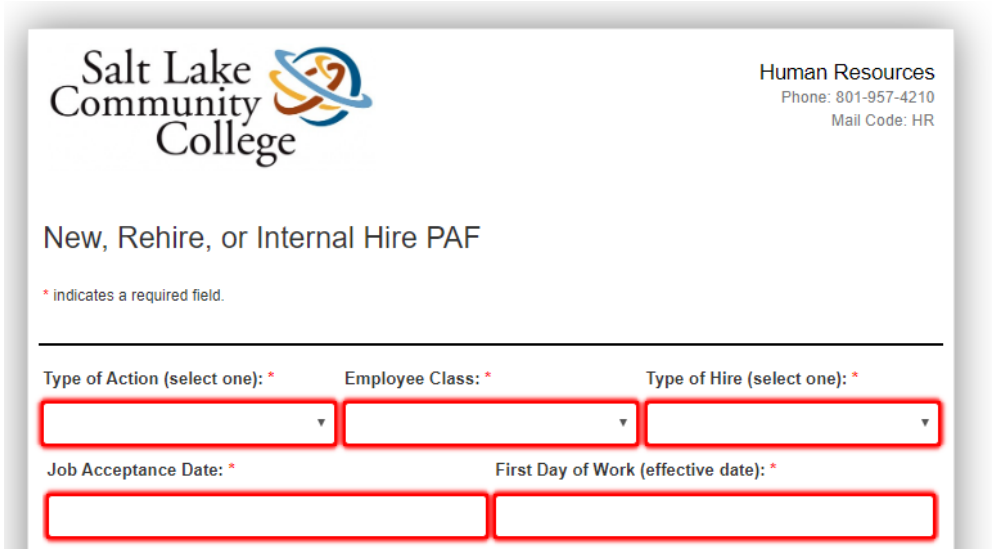

Figure 3- Example of how the system highlights required fields after the user has attempted to submit the eForm.

3) Attaching a supplemental document:

a. If the user is required to attach a document, they can start by clicking on the "Attachments" button at the bottom of the form located in the Originator Action Bar.

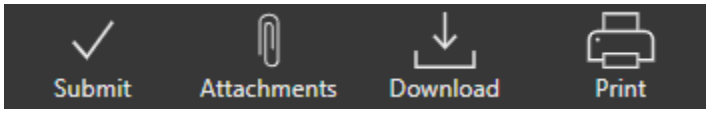

Figure 4- Originator Action Bar

b. The Attachments box opens. The user can attach a document by clicking on the "upload File(s) link. This will allow the user to browse for documents. Only Image files (BMP, TIF, JPG, PGN, GIF) and PDFs are accepted. The system will not allow uploading of other file types.

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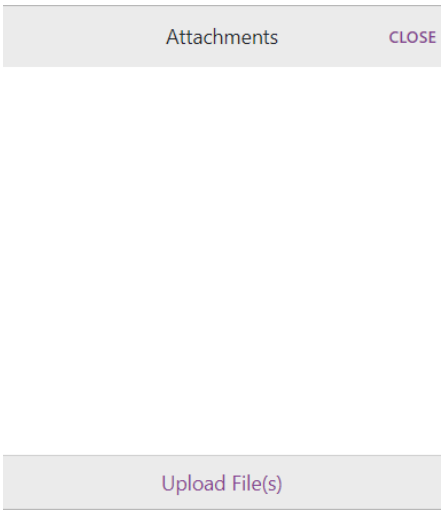

Figure 5- Attachment box

c. Once the document is attached the user can edit, delete, or view the attachment. Editing the attachment allows the user to change the name and add a description.

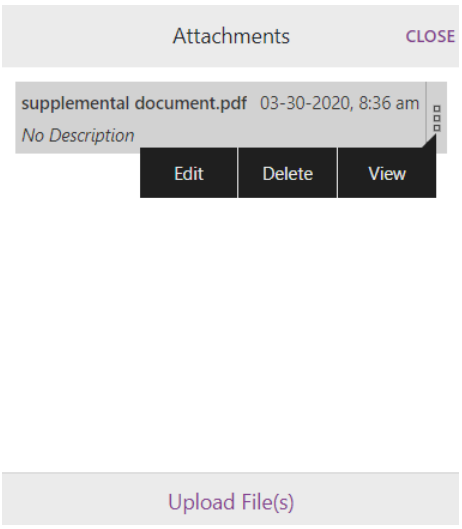

Figure 6- Attachment box with an attached document

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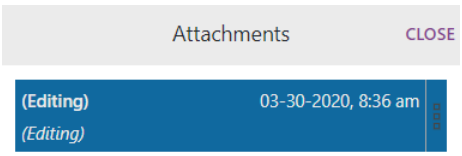

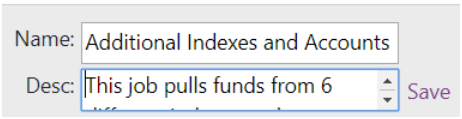

Figure 7- Editing Name and Description

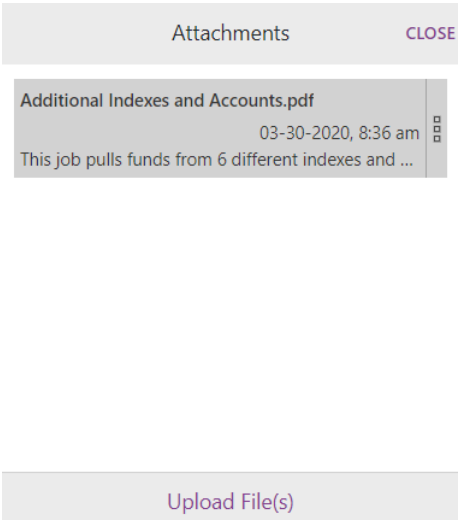

Figure 8- Attachment's name and description successfully edited

d. When completed successfully there will be a red badge number on the attachments button indicating the number of attached files.

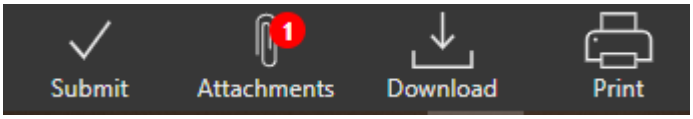

Figure 9- Originator Action Bar showing 1 document is attached.

4) Routing an eForm for approval.

a. Some forms will require the originator to direct which approvers the form will route to. See Figure 10 for an example of the search box used to direct routing. Type the approver's email in the search box, then click Search. (ex. bruin.bear@slcc.edu) After clicking search, the approver's first name, last name, and username should populate in the row below. Upon submission, the form will be routed for their review.

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b. Troubleshooting: If an error occurs, first check the spelling of the email against the outlook directory. If everything is spelled correctly, try capitalizing the first and last names in the email (ex. Bruin.Bear@slcc.edu).

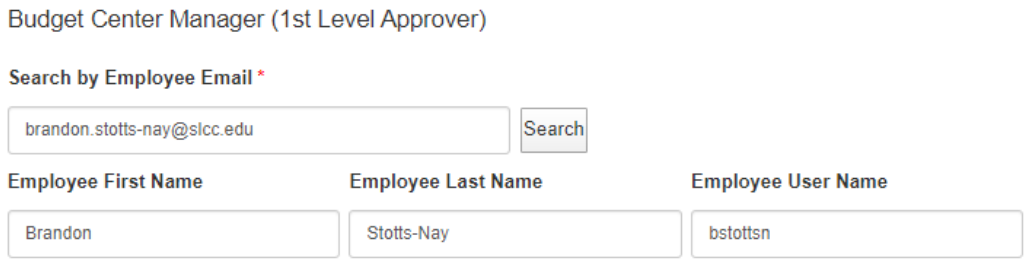

Figure 10 - Example of a first level approver search box.

c. If the Originator knows that one of the approvers will be out of the office and is aware of another approver that can sign on their behalf, they can search for the person instead and the form will be routed to them upon submission.
d. Once a form is received, it can only be only be re-routed (returned, approved, declined) by the approver that received it. If the form cannot wait for the approver to return, the originator of the form will need to restart the process and submit the form again.

5) Submitting a completed form:

a. Once all required fields and attachments have been completed, click the submit button on the bottom of the webpage.

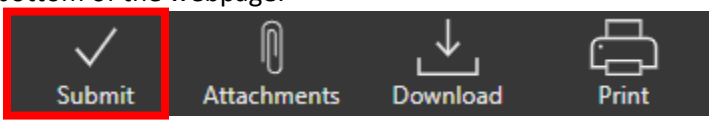

Figure 11- Submit button at the bottom of the webpage.

6) Drafting a form to be submitted later:

a. If the User begins an eForm they can leave and come back to it later. The system will save a draft of all fields the User inputted in their previous session along with any attachments that were uploaded. This can be accessed under the form's header in the Drafts section.

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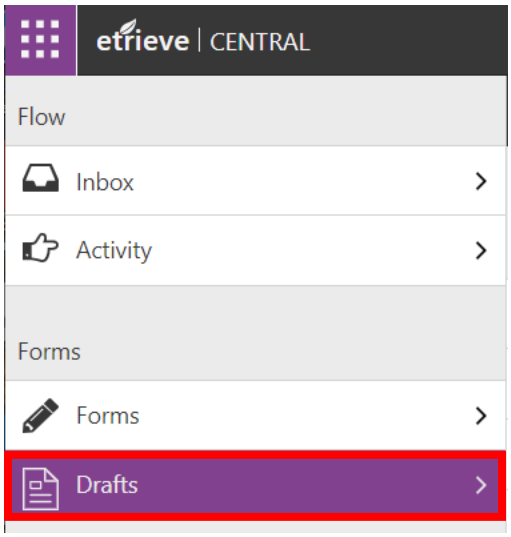

Figure 12- Location where the system stores the User's drafts.

7) Tracking an eForm's status in the workflow:

a. To track a form's status that has been submitted. Click on "Activity" under the Flow heading on the left of the page. Then click on the form that was previously submitted.

i.

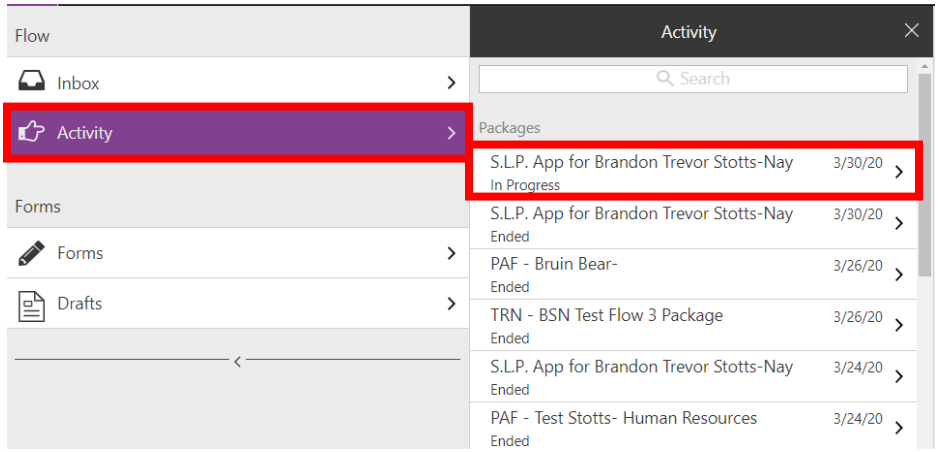

Figure 13- Activity shows all previously submitted forms.

b. Once the form has been opened, click on the history button at the bottom of the webpage. The package history will show where the form is at in the workflow.

i.

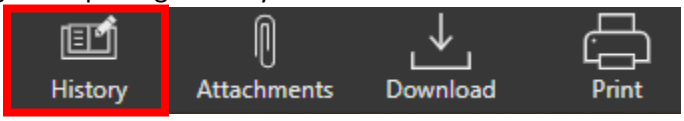

Figure 14- History button at the bottom of the webpage.

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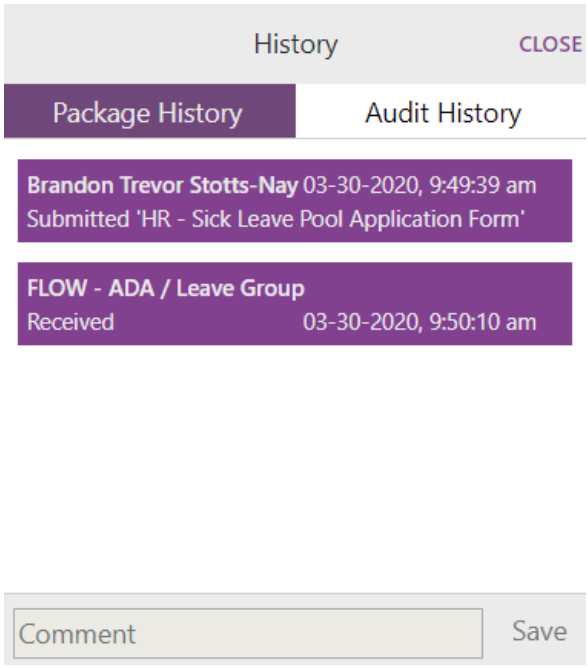

Figure 15- History indicates that this form is pending approval at the ADA/Leave Group level

8) Changing and resubmitting an eForm that has been returned:

a. If a form is returned by an Approver, the user will receive an email from etrieve@slcc.edu indicating that the form has been returned and is available for review.

b. The user can access the form by clicking the link provided in the email and logging-in. Click inbox, and then click the "package". This will take you to the form.

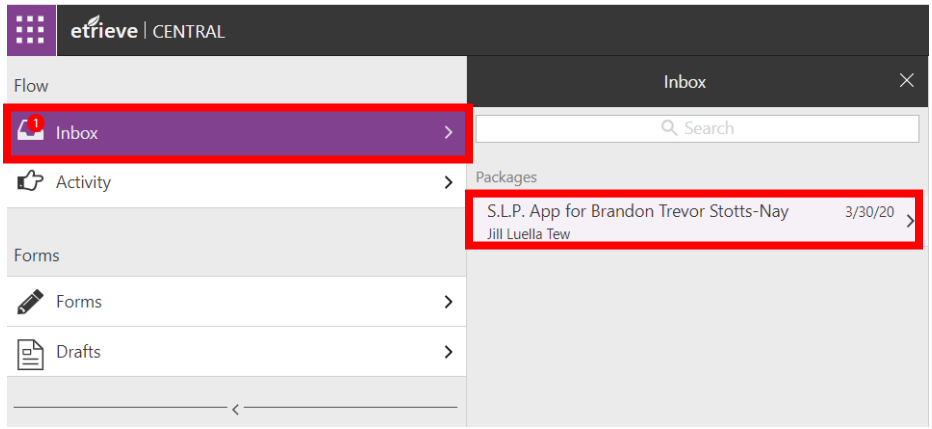

Figure 16- Inbox indicates that a form is waiting to be acted upon.

c. Comments can be reviewed by clicking the history button. Complete the Approver's request and resubmit the form. Comments can be submitted by the Originator if completed before form is resubmitted.

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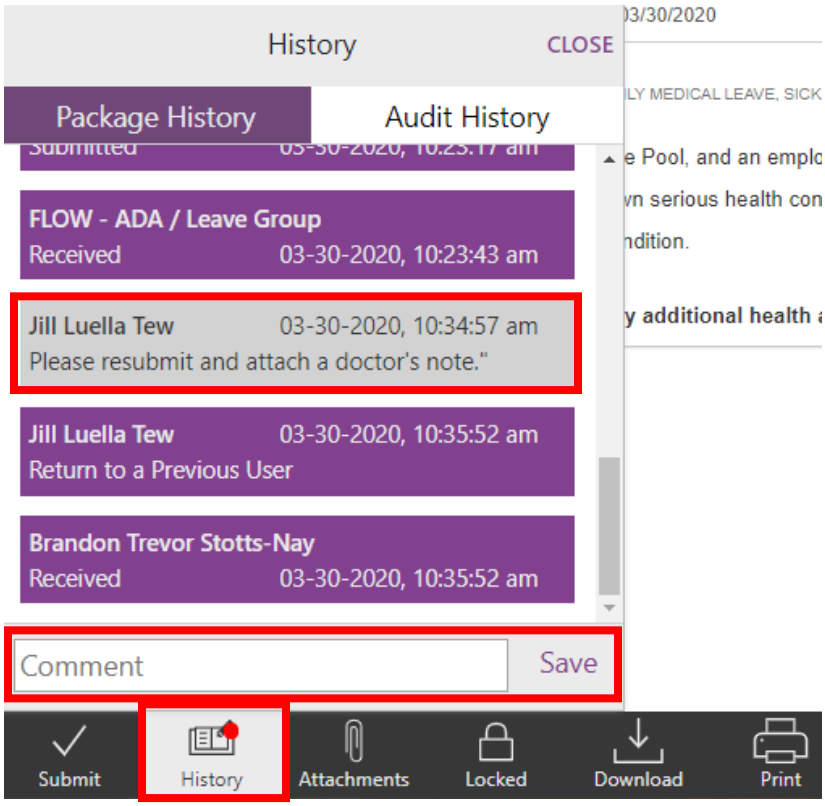

Figure 17- History opened, with Approver's comment viewable.

9) Downloading and printing an eForm:

a. All past forms the user has submitted can be accessed under the Flow header in the Activity section.

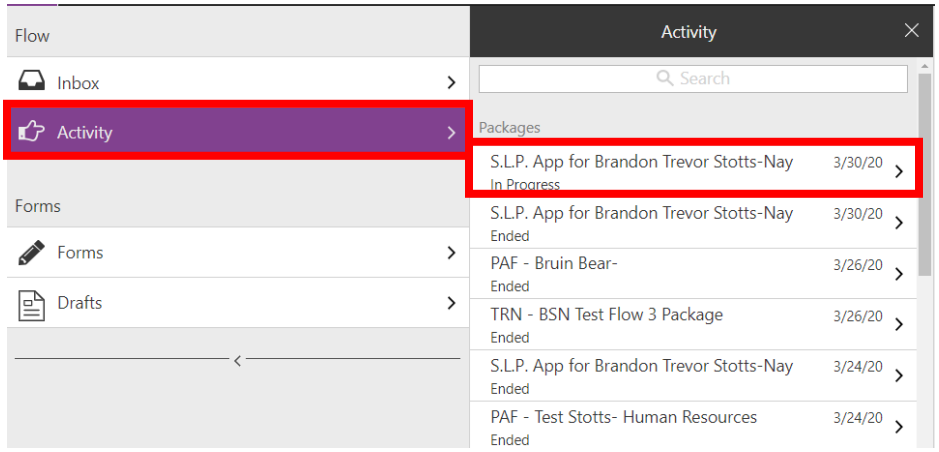

Figure 18- Activity shows all previously submitted forms.

b. The user can download or print a copy of the form at anytime by clicking the download or print buttons on the Originator Action Bar at the bottom of the webpage.

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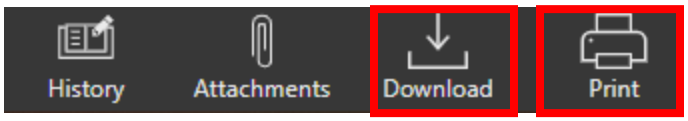
i. 

Figure 19- Download and print buttons.

c. If downloaded, a pdf will be downloaded to the user's computer. If printed, a pdf will open in the user's browser allowing for the form to be sent to a printer.