Welcome to a BITS Video Tutorial on using electronic forms. Electronic forms are passed from person to person for approval via an email notification. This method of transferring forms has the potential to save time, avoid errors and track where the form is at all times.

This eforms video will take you step by step through the eForms server environment and submission process. BITS video tutorials run just like an online movie; you can review and pause if you need to hear a specific instruction over again. You can also use the Table of Contents, located on the left, to jump forward and back to parts that are relevant to what you need.

1. **LOGIN** - eForms are electronic versions of administrative or academic forms. All electronic forms are now in this format, including those that were previously found in LiquidOffice

   To work with real eForms, first, open your Internet browser and type http://eform1.uwec.edu into your address bar. You may login using your University username and password.

   However, for the purposes of this tutorial, we will use the test site, http://eform2.uwec.edu. I will login with the username Train_1. There is no password required. If you would like to "test" a form here, you can also log in as Train_1.

2. **ENVIRONMENT** - The BP Logix homepage organizes your screen into four windows: Task List, Running Workflows, Searching and Access Forms.
   a. In the upper left hand corner is the Task List window. This shows any forms that have been sent to you, any forms you have started and any forms you are currently working on that have been saved and closed. You can update your Task List to check for new tasks by clicking the "Refresh" icon in the top right corner of the window.
   b. To the right of the Task List window is the Running Workflows window. This shows the path a form takes from initiation to final approval. From this list, you can determine the status of a form, allowing you to see exactly where in the workflow it is.
   c. Beneath this window is the Searching window. This allows you to search for completed forms using criteria such as last name or date of submission.
   d. The final window is the Access Forms window. This is a pull-down menu that allows you to open and begin forms. You can search for forms in this window by the department responsible for them. This tutorial was created when only Human Resources and LTS had available eForms.

3. **NAVIGATING IN A FORM** - For the purposes of this tutorial, we will use the Personnel Action Request Form or PARF Form, located in the Human Resources Department. You'll notice the form is very similar to other forms you may have filled out in the past. However, there are some important tips to remember when working with an eForm.
   a. In most cases, you can press the [Tab] key on your keyboard to move from one field to the next. This is especially handy in instances where you need to type in many different categories of information, much like the first block of this form.
   b. Notice that required fields appear with either a red asterisk or are bordered in red. If you happen to forget or miss completing a required field, when you try to submit the form, you will be prompted to complete the missed field. You will not be able to submit the form if any required fields are left blank.

        i. For this tutorial, let's click on "New Hire-Academic Staff" – notice the loading icon. If you see this icon, there is no need to click again – it simply shows that some processing takes longer than others.

   c. In some forms there are ellipse buttons. These buttons allow you to assign a user to a particular field. Generally, these are used in two particular instances: filling in a user ID and assigning the person after you in the routing order. To use this button, simply click the button to bring up the searchable menu. Type the last name of the user you are looking for, find that user, check the box in front of that user's name, and click [OK].
        i. Notice that once you select the user, their personal information fills in the fields below the ellipse button.
   d. Some forms, particularly in Human Resources, will have a section for account information. In the PARF form, it asks to choose the number of funding strings necessary. This is to show how many sources of funding are used to pay the person being hired. Many times, it is just one source; however, it can be more.
   e. Also, some radio buttons will offer more or less information, depending on your answer. For example, the Contingency field in the PARF form will show more or fewer fields depending on your answer. If you answer yes, notice that several more fields appear.

4. **Attaching a File** - In some forms, attaching a file is necessary. This is very similar to making an attachment in an email. Simply click the [Attach File] button next to the field, browse for your file and click [OK]. More than one file can be attached. You also have the option to remove a file if you change your mind.

5. **Save and Close For Later** - One useful tool you may want to remember is the [Save and Close for Later] button at the bottom of the page. This allows you to save everything you've done on your form, but close it for now so that you can open it at a later time.
   a. Notice you can also choose to print your form; however, since these are electronic forms saved in a database on the server and retrievable at any time, there really is no need to print them.

6. **Submitting a Form** - When you're done with your form and ready to submit it, you will need to select a person to submit it to. This is the person that comes after you in the routing order. At the bottom of the page, you'll notice the ellipse button: this is the last field to fill out. Click the ellipse button and select your user. For the purposes of this tutorial, we'll assign this to "train_2."
   a. Notification of the form will be sent electronically to the next person via email (Display the image of the Outlook message) OR the next person will see the form in their Task List by hitting the refresh icon on the BP Logix eForm homepage.

7. **Working with Submitted Forms** - To simulate being the second person in a routing flow, let's login as Train_2, the user we just assigned the form to. To do this, let's go back to the BP Logix homepage and click "Logoff" in the top right corner. We can now login as "Train_2." Again, no password is needed. Now, in our Task List window, we should see the form we submitted. Notice, as the second person in the workflow, you may have more fields to fill out with necessary information.

   At the bottom of the page, you should see many more possible transactions to choose from, rather than just the ellipse button.

a. You can transfer – this is typically used by people who initiate or review the form but do not have approval authority.
b. You can approve – this places your digital signature on the form and it will go to the next person in the workflow. If no one is chosen from the ellipse button above, the form will, in this case, go to Barb Hanson in the Human Resources office.
c. You can reject – this means you do not approve of the form. The workflow typically ends with a rejection.
d. You can also discard – this exits the form, changes are lost and your screen returns to the Task List portion of the eForm homepage.
e. You may want to click the Return to Initiator button if changes need to be made by the first person in the workflow, the initiator.

Finally, when the form has been approved by all participants, the form will go to the Department, in this case, Barb Hanson in the HR office. When the department approves the form, a follow-up email will be sent automatically to all participants of this form and attached will be the form and all other documents in PDF format. (Display the image of Outlook message with PDFs attached)

8. **Contact Info** – Should you want to make a suggestion for changes to a form, from the BP Logix homepage, go to the Access Forms Window in the bottom left corner and from the pull-down list select **LTS** and choose the **Change Request Form**.

   If you have any questions about the form you're completing, the main contact is the department responsible for the form. If you're filling out a PARF form, for example, call the Human Resources department with specific questions. Your contact is Barb Hanson 836-5040 (Black Screen with name and phone displayed).

   However, if you have technical questions concerning eForms, contact the Help Desk at (836-5711) (Black Screen with Help Desk and phone displayed). If you have any other questions regarding this or other video tutorials, or general software questions, please do not hesitate to contact BITS, located in Old Library 1106, or by email at training@uwec.edu. (Black Screen with name and phone displayed)