

ETRIEVE ORIGINATOR GUIDE

THIS GUIDE PROVIDES AN OVERVIEW OF THE FOLLOWING ORIGINATOR ACTIONS:

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LOCATING AN E-FORM

- All published digital forms can be found here: <https://okanagan.etrive.cloud/central/forms>
- To originate an e-form, Originators need to log into [myOkanagan](#) using their Okanagan College email and password, if they have not already done so.
- Once in Etrieve, with the Forms menu entry selected, you will see a list of all Digital Forms available to you. You can scroll down through the list to locate the exact form you are looking for or use the search function at the top to filter by form name.
- Click on the e-form you would like to initiate, and then it will launch on the right-hand side:

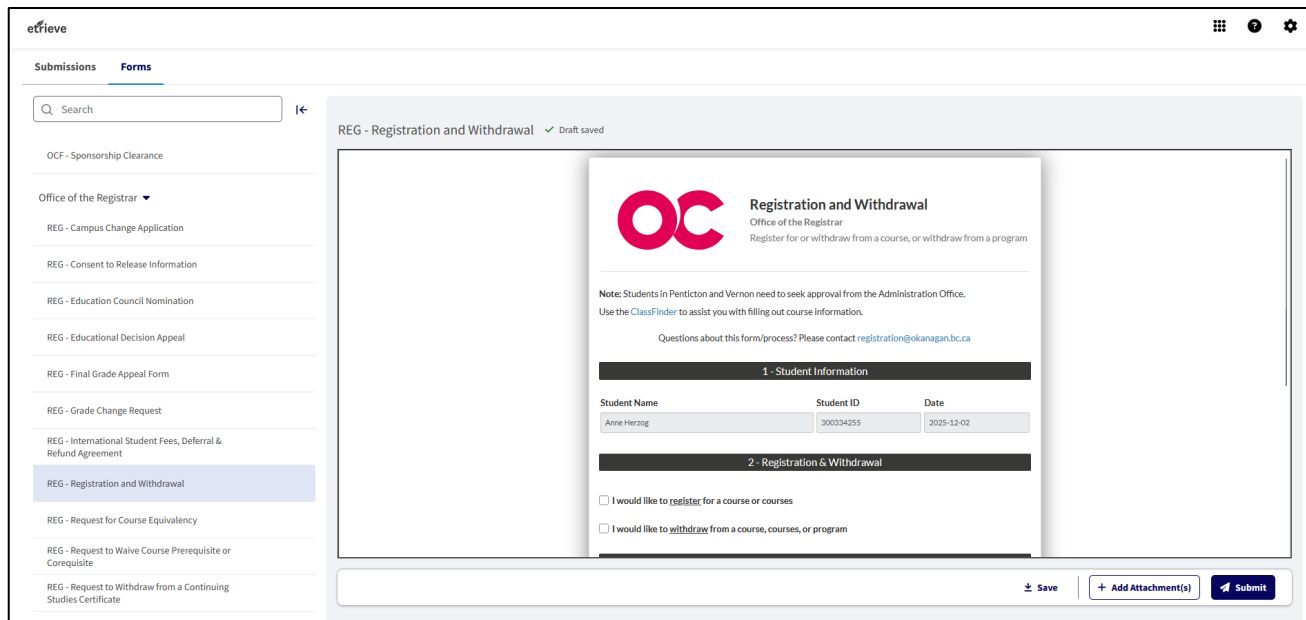


Figure 1. E-Forms start page.

HOW TO FILL OUT AN E-FORM

- To complete an e-form, simply type in the required information or use the drop-down fields as designated.
- When submitting, if a required field is left blank, the system will prompt the user with a dialogue box (Figure 2) in the right-hand corner of the screen, and outline missed fields in red (Figure 3). These must be completed in order for the form to be successfully submitted.

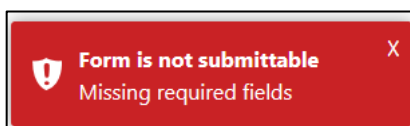


Figure 2. System error received when all required fields are not complete.

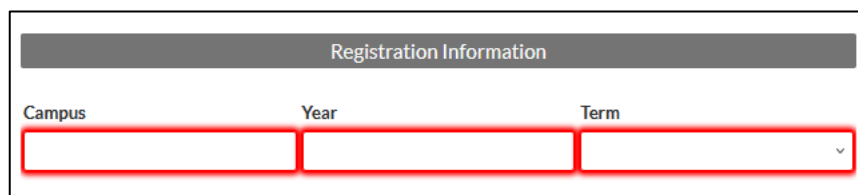


Figure 3. Example of how the system highlights required fields after the user has submitted an e-form.

ATTACHING SUPPLEMENTAL DOCUMENTS

- Some e-forms require documents to be attached. For example, some Expense Claims require receipts to be uploaded and attached. To attach a document, start by clicking the **Attachments** button at the bottom of the form located in the Originator Action Bar (Figure 4).



Figure 4. Originator Action Bar.

- The attachments box will open. You can attach a document by dragging and dropping files into the pop-up window or by clicking on 'Browse Files'. This will allow you to search for documents. Only PDFs, image files (BMP, TIF, JPG, PGN, GIF), Word documents, and excel spreadsheets are accepted. The system will not allow uploading of other file types. Ensure file names do not have special characters (commas, underscores, dashes, etc.).

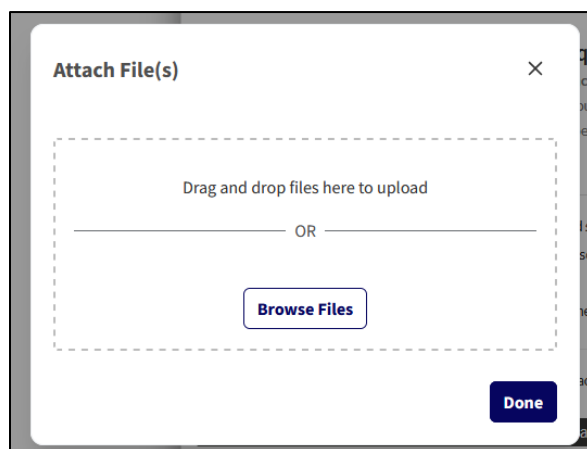


Figure 5. Attachments box.

- Once the document is attached, it can be edited, deleted, or viewed. Editing the attachment allows for changes to the name.

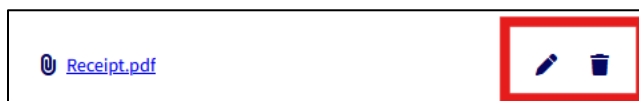


Figure 6. Editing or deleting an attached document.

- When uploaded successfully, there will be a badge number on the attachments button indicating the number of attached files.

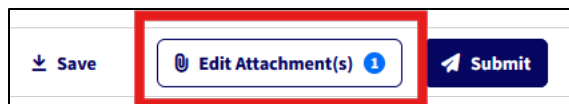


Figure 7. Originator Action Bar showing one document is attached.

ROUTING AN E-FORM FOR APPROVAL

- Some forms may require the Originator to direct which approvers the form will route to. Click on the reviewer or approver box (Figure 8) and start typing the approver's first name to search the list of employees. After clicking the approver's name, the name will populate in the input. Upon submission, the form will be routed for their review/approval.

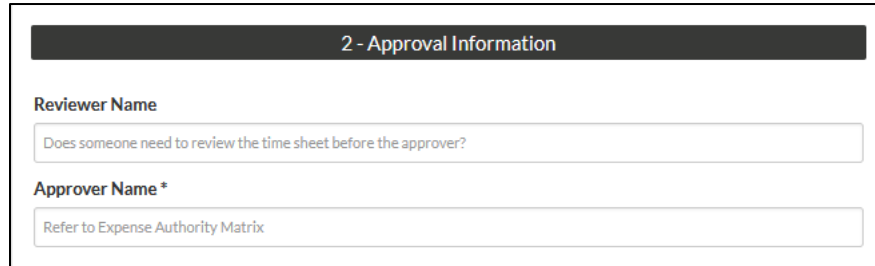


Figure 8. Example of the approver and reviewer search box.

- Review/Approver inputs search all employees in Etrieve. If an approver or reviewer is out of the office, an alternate reviewer/approver can be selected

SUBMITTING A COMPLETED E-FORM

- Once all required fields and attachments have been completed, click the **Submit** button on the bottom of the webpage.



Figure 9. Submit button at the bottom of the webpage.

- Once an e-form is submitted, the Originator cannot act on the form or retrieve it. Only a reviewer/approver can act on the form. If you need to adjust your submission, contact whomever the form is with, and ask them to return it to you (see [Tracking an e-form's status in the workflow](#)).

FORM DRAFTS

- As you make changes to a form by entering data and adjusting inputs, a draft is kept up to date. All drafts can be accessed in the Drafts section (Figure 10) and are listed in order of last modified. This is useful for logging mileage or hours as you incur them to be submitted later.

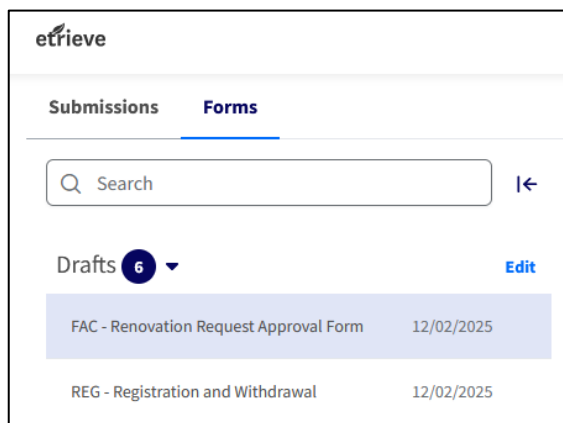


Figure 10. Location where the system stores the user's drafts.

TRACKING AN E-FORM'S STATUS IN THE WORKFLOW

- To track a previously submitted form's status, click on Submissions and filter by 'In Progress' and/or 'Completed' (Figure 11). 'In Progress' means that a form is still in the workflow. 'Completed' filters forms that have been fully processed, the workflow has ended. Search for and click on the form that was previously submitted.

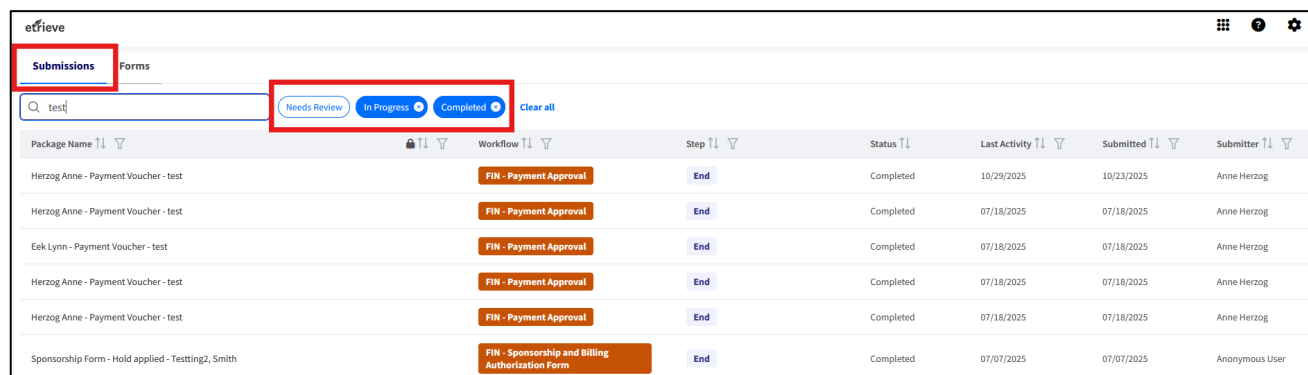


Figure 11. Submissions page with In Progress and Completed filters.

- To view details about an e-form's progress in the workflow, click on the form's name to open it. The History pane on the right side of the screen will show at which step in the workflow the form is.

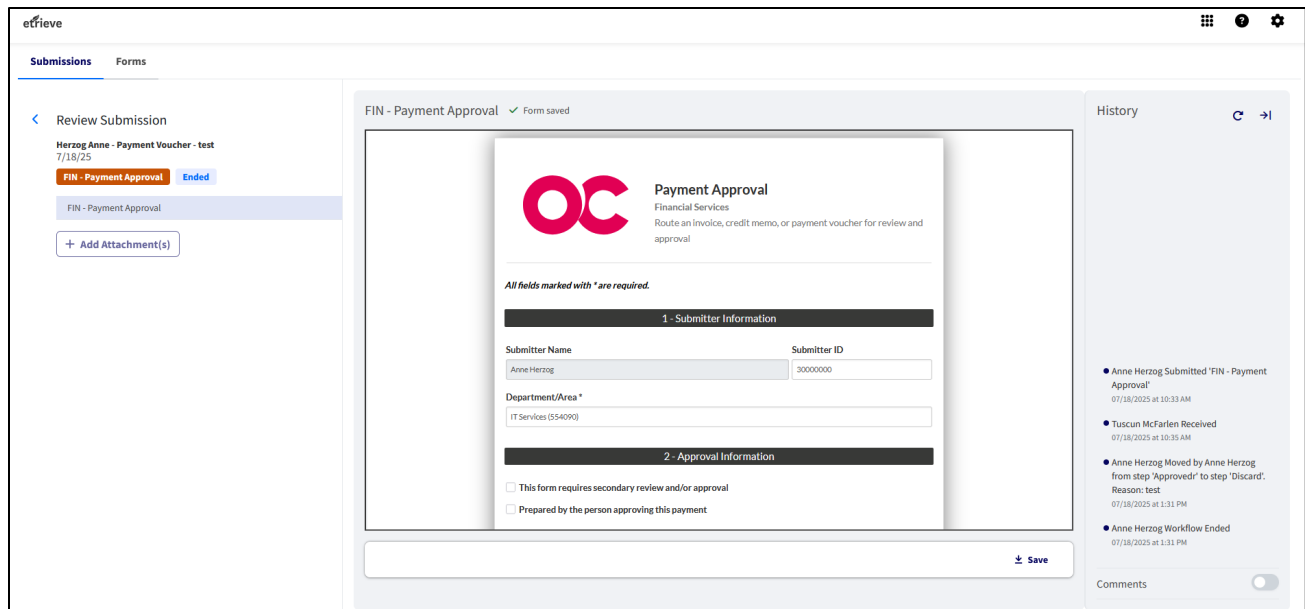


Figure 12. Form detail view and history.

CHANGING AND RESUBMITTING AN E-FORM THAT HAS BEEN RETURNED

- If a form is returned by an Approver, the Originator will receive an email from etrieve@okanagan.bc.ca indicating that the form has been returned and is available for review. Comments may be included in the email notification.
- The Originator can access the form by clicking the link provided in the email or by navigating to their Etrieve Submissions, filtering by 'Needs Review' and selecting the package. Details and comments can be viewed by clicking on the form to open it.

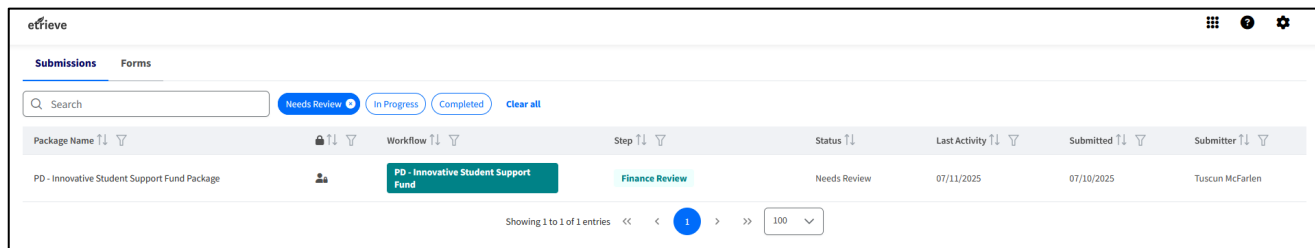


Figure 13. Submissions page with Needs Review filter.

DELETING AN E-FORM THAT HAS BEEN RETURNED

- If an e-form is returned to you and you'd like to delete it from your inbox, locate the checkbox near the top of the form that states, "I would like to discard this form".

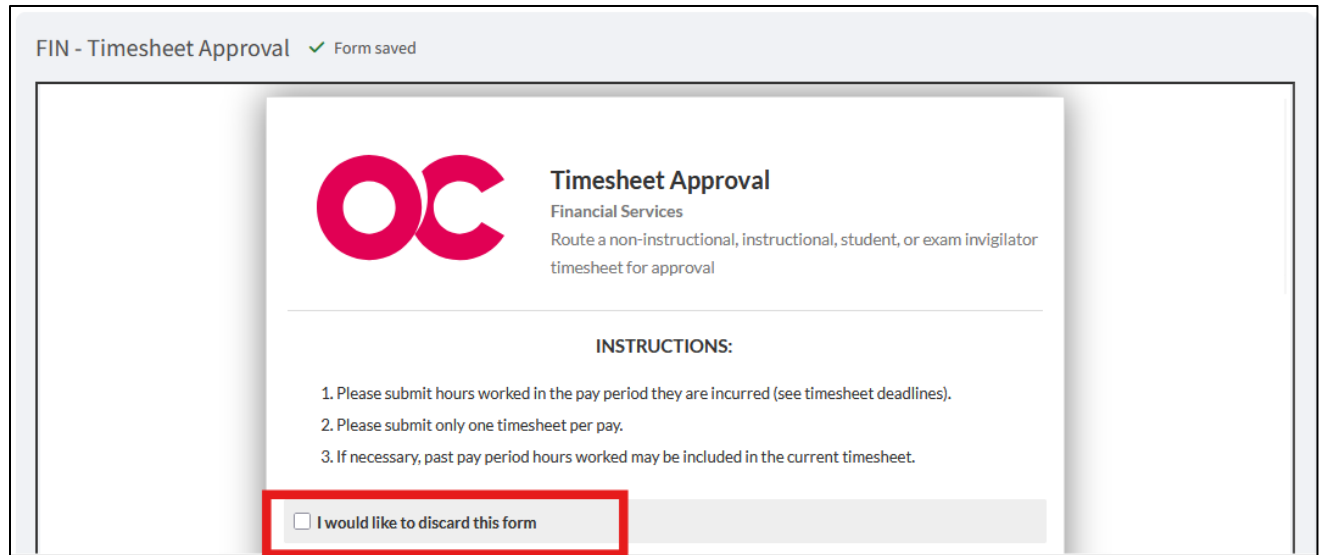


Figure 14. Discard checkbox location.

- Check the box, then click 'Submit'. If the box is checked, this will not move the form back into the workflow.
- Click 'confirm', and the form will be deleted from your inbox and the workflow.

DOWNLOADING AND PRINTING AN E-FORM

- All forms that you have submitted can be accessed on the Submissions page when filtering by 'In Progress' and 'Completed'.
- To download or print a copy of a form, open a form from the submissions page, then click 'Save' at the bottom. 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.

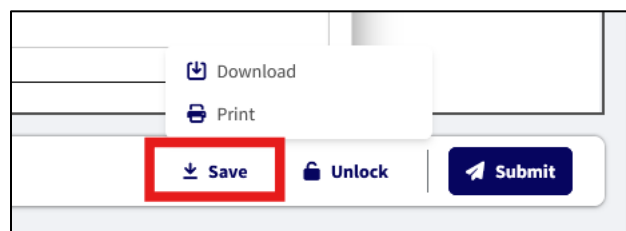


Figure 15. Save to download or print button.