

Etrieve - Originator Guide



1. Locating an e-form



2. How to fill out an e-form



3.

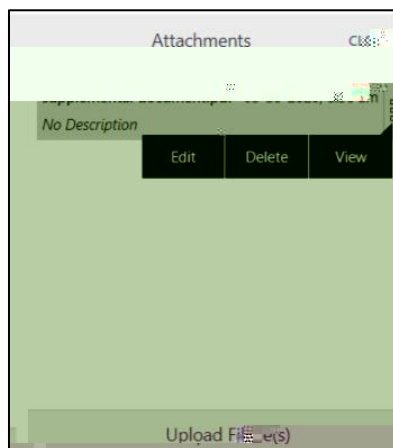


Figure 5. Attachment box with an attached document.

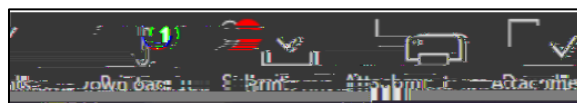


Figure 6. Originator Action Bar showing one document is attached.



5. Submitting a completed e-form

8. Tracking a e-form's status in the workflow

Activity

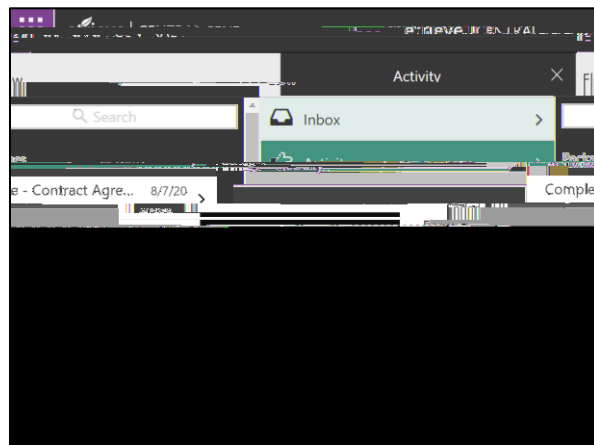


Figure 11. Activity shows all previously submitted forms.

History

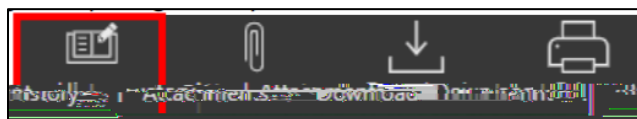


Figure 12. History button at the bottom of the webpage.



9. Changing and resubmitting an e-form that has been returned



Inbox

Figure 13. Inbox indicates that a form is waiting to be acted upon.



10. Discarding an e-form that has been returned

- a) If an e-form is returned and you would like to discard it, you can check the checkbox on the form that states, "I would like to discard this form".



Figure 15. Discard checkbox location.

- b) Once this box is checked, the *Discard* button will appear in place of the *Submit* button on the Action Bar below the form.

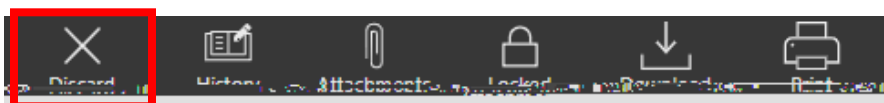


Figure 16. Discard button location.

- c) Click the *Discard* button and, after a confirmation, the form will be deleted from your inbox and the workflow.



11. Downloading and printing an e-form

Figure 17. Activity shows all previously submitted forms.

Figure 18. Download and print buttons.