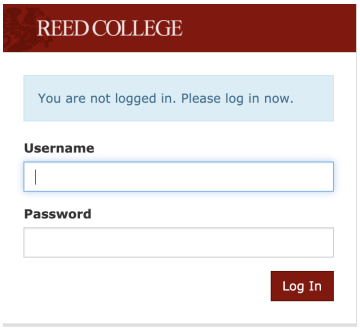
Course Approval - Etrieve Forms Quick Guide

1 Accessing Etrieve

1.1 URL - etcentral.reed.edu

1. Log in with your kerberos account

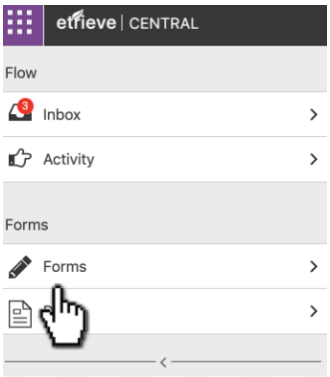


1.2 DUO Authentication

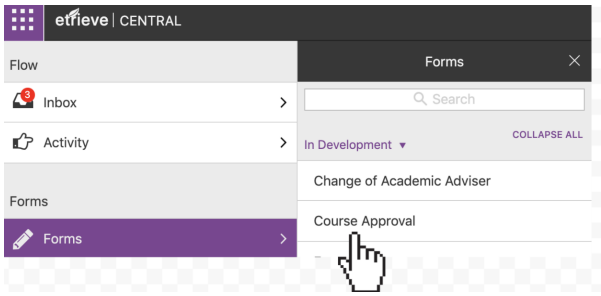
2. Select “Remember me for 30 days”
3. Send yourself a push or type in the access code on your token
4. Click Approve on your Duo Mobile application
5. Sign in with your kerberos account. This would be the same login you use to log into Reed Gmail

2 Forms

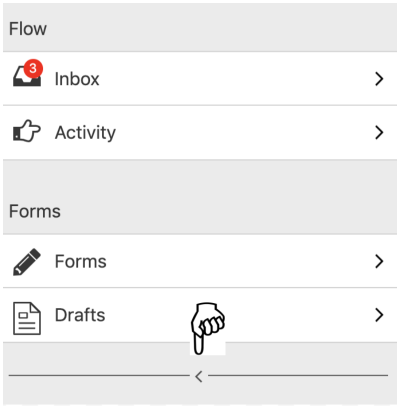
2.1 Select Form



The selected Form will automatically load in the form on the right side of the screen.

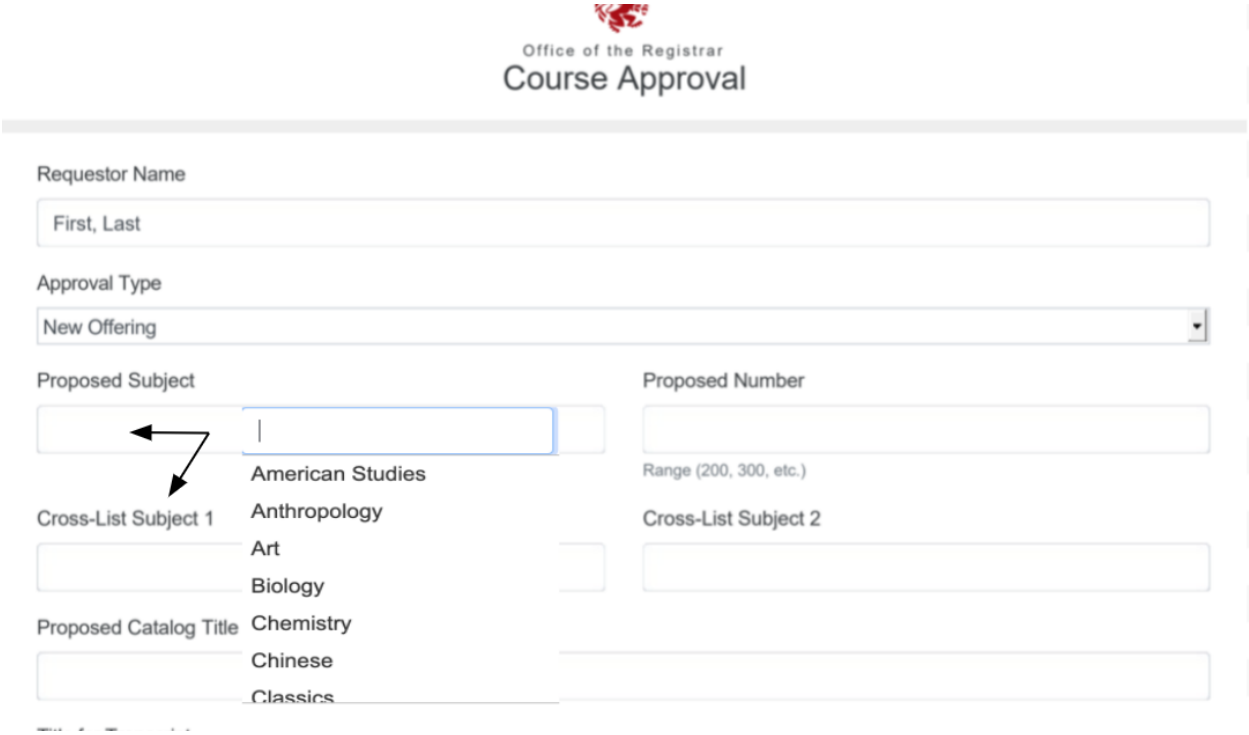


To create more space for your Form, click the arrow underneath the Drafts folder



2.2 Fill out Required Fields

Click into the Subject Fields to obtain a drop down list of subjects, or type in a New Subject.



If you need to change the value of a field that is a drop down list, clear/delete ***all*** the text in the field in order to select another option from a drop down.

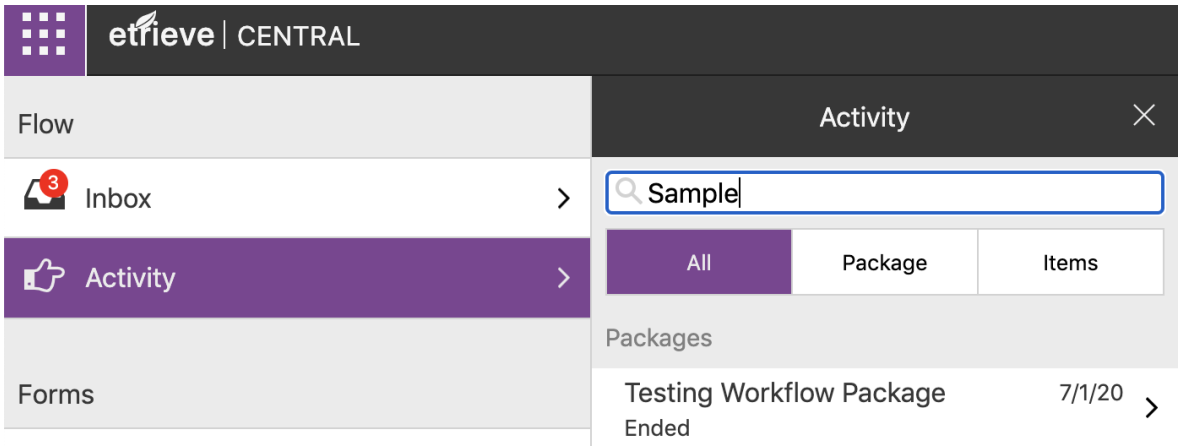
2.3 Submit

After you have filled out the form, click the “Submit” button.

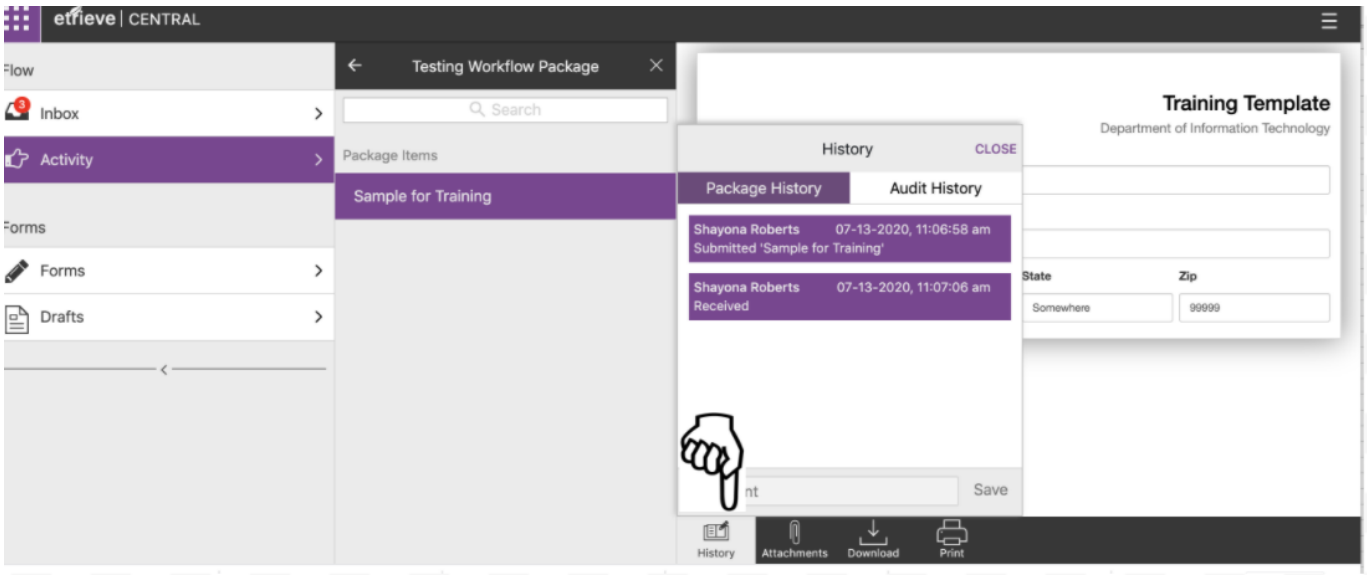
A confirmation will display on screen confirming that your submission went through.

2.3 Checking the Status of your Form

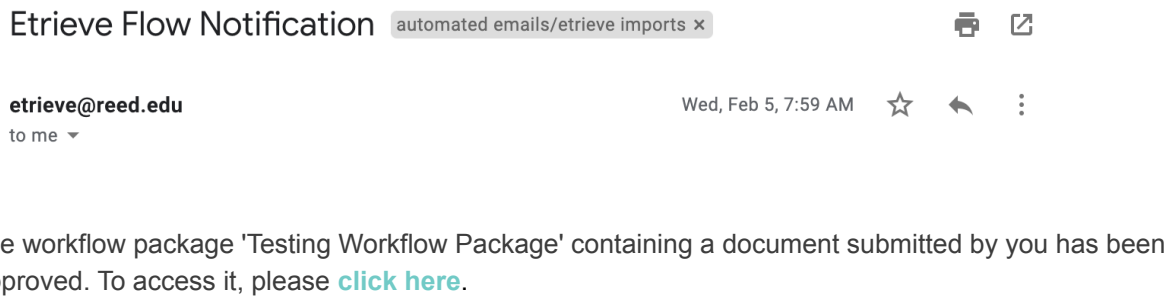
If you want to check on the status of your request after you submit it, you can log into Etrieve and click on “Activity” in the menu on the left.



Select your Form and select “History” at the bottom of the screen. The Package History will show the progress of your request.



You will receive an email notification with Subject “Etrieve Flow Notification” from etrieve@reed.edu (see below) when your request has been processed by the Approver.



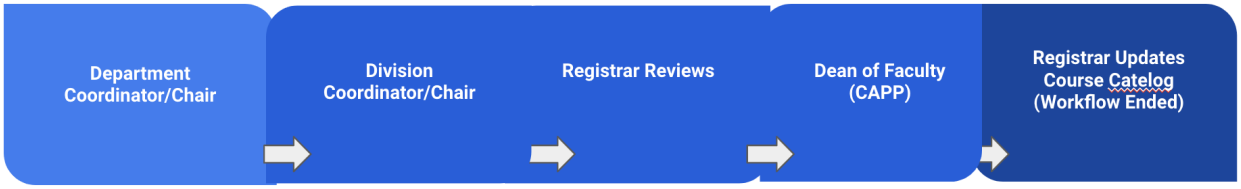
Please note that when you have a form in process, you will not be able to make additional changes to your curriculum.

3 Workflow

Once submitted, forms can be routed through approval using a rule based workflow, with the employee or student being able to track it's status at any time.

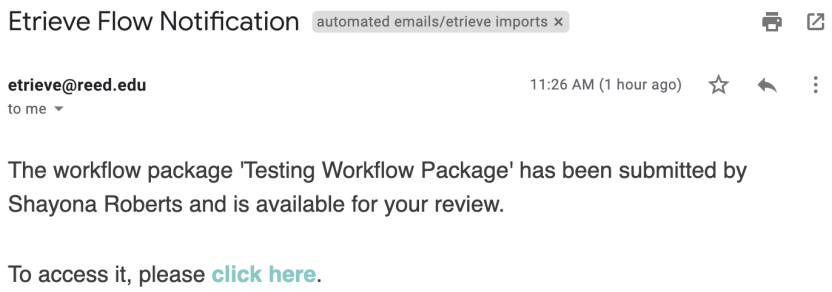
Recipients can then review, approve, deny, comment, edit, or re-route the form based on situational needs.

3.1 Course Approval Workflow

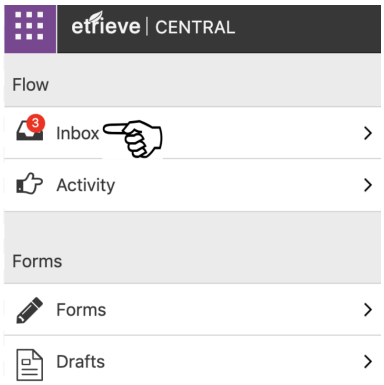


3.2 Workflow Actions

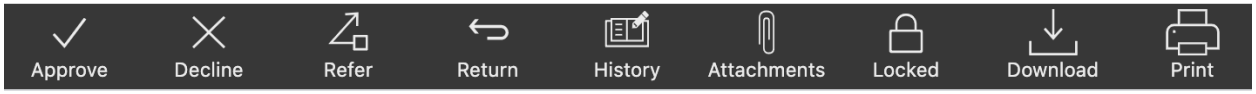
When a Form is submitted the approver(s) will received an email as follows:



Click the link from your email or click on the form in your Inbox



From the Inbox panel a user can perform the following actions within Flow:



APPROVE | Approves the document, allowing it to continue with its approved workflow

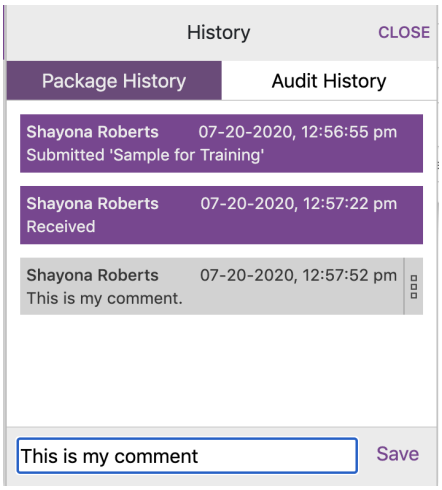
DECLINE | Declines the document and sends it through an alternate declined workflow.

REFER | Allows the document to be submitted to an alternative user for review.

RETURN | Allows the document to be submitted to any previous user within the workflow for review.

HISTORY | History allows the user to view information about the Package's routing in the workflow up to the present time. If the Package Item is an eForm, information about any changes that have been made to the form will also be recorded.

PACKAGE HISTORY | View a detailed history of the Package's progress. Additionally, a user has the ability to add general comments regarding package actions. Anyone in the workflow can see your comments. Comments should be used if you are returning the document to a previous person in the workflow, including the one who submitted the form (Originator).



AUDIT HISTORY | View any changes or updates that have been made to the Form. Select the View Changes button to the right of the Form Name and the Form will appear in the Viewer in a read-only format. Purple informational tags are displayed in each field of the Form regardless of whether or not changes were made. If a field on the Form was changed, the actual change made, date, time and user ID is presented when the informational tag for that field is selected.

ATTACHMENTS | Users may upload file(s) to the Item that is currently being displayed in the Viewer. Click on the icon and a panel will be displayed where the user can select files and upload them. After attachments have been uploaded, when the icon is selected, there will be a red badge on the icon displaying the count of attached documents. There will also be a small image with three stacked squares in the Upload Dialog Box. The user can select this icon to Edit, Delete or View the Attachment. When View is selected, the file will be downloaded in its native format.

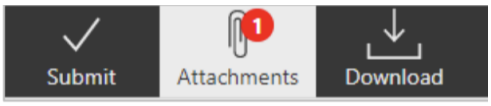
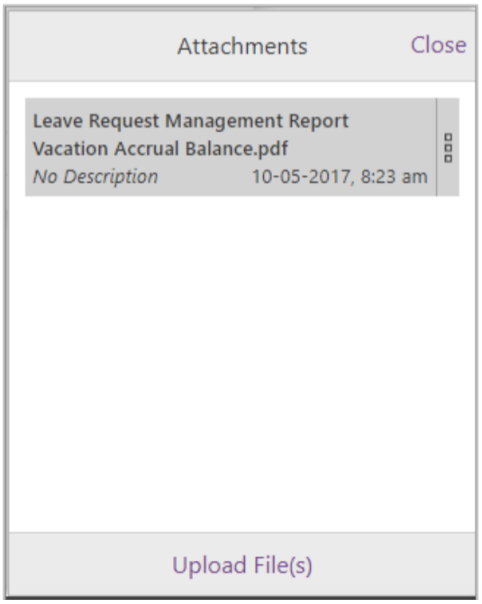


FIGURE 3.10 Attachments Icon



LOCKED/UNLOCKED | Represents the current Lock status of the document. A locked document can only be edited, approved, referred, etc., by the user who locked it.

DOWNLOAD | Downloads a PDF version of the Package. An Item with multiple pages includes all pages within the PDF. An additional page with the Package history information will be appended to the end of the Package PDF file.

PRINT | Print the current document.