



# IT SERVICES

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DIGITAL TRANSFORMATION INITIATIVE

## Etrieve - Originator Guide



This guide provides an overview of the following Originator actions:

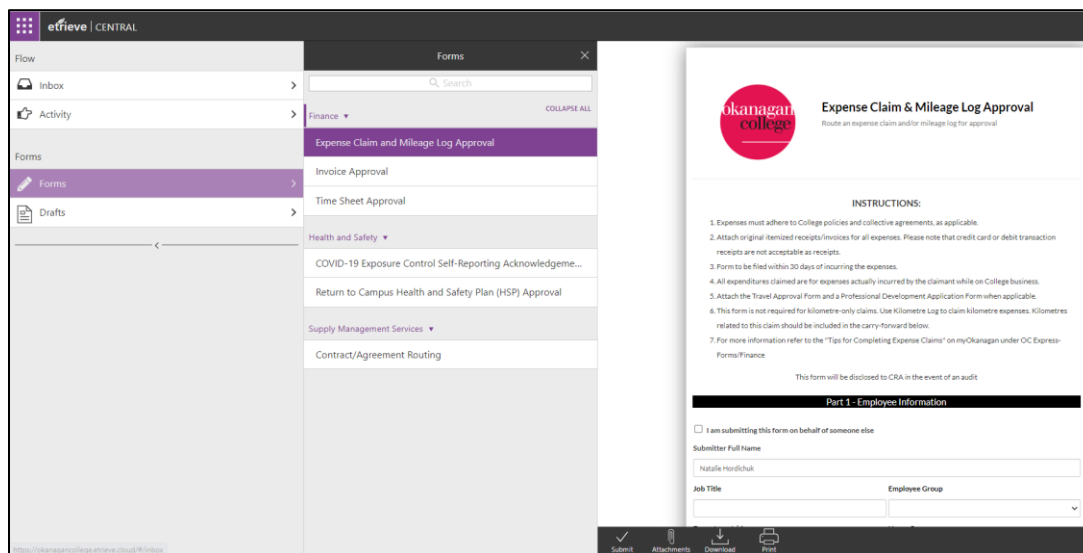
1. Locating an e-form .....	2
2. How to fill out an e-form .....	3
3. Attaching supplemental documents.....	4
4. Routing an e-form for approval.....	6
5. Submitting a completed e-form .....	7
6. When an external signature is required.....	7
7. Drafting an e-form to be submitted later .....	8
8. Tracking a e-form’s status in the workflow.....	9
9. Changing and resubmitting an e-form that has been returned .....	10
10. Discarding an e-form that has been returned .....	11
11. Downloading and printing an e-form .....	12

# 1. Locating an e-form

- a) All digital published forms can be found here: <https://okanagancollege.etrivee.cloud/#/form>.
- b) 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.
- c) Forms are also available in myOkanagan, for example 'Non-Instructional Timesheet'. **Note:** not all forms are digital at this time.



- d) After clicking an e-form link in myOkanagan, the form selected will appear in Etrieve:



## 2. How to fill out an e-form

- a) To complete an e-form, simply type in the required information or use the drop-down fields as designated.
- b) When submitting, if a required field is left blank, the system will prompt the user with a dialogue box (Figure 1) in the right-hand corner of the screen, and outline missed fields in red (Figure 2). These must be completed in order for the form to be successfully submitted.

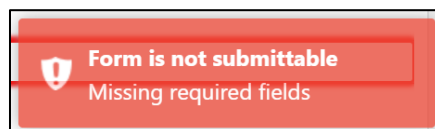


Figure 1. System error received when all required fields are not complete.

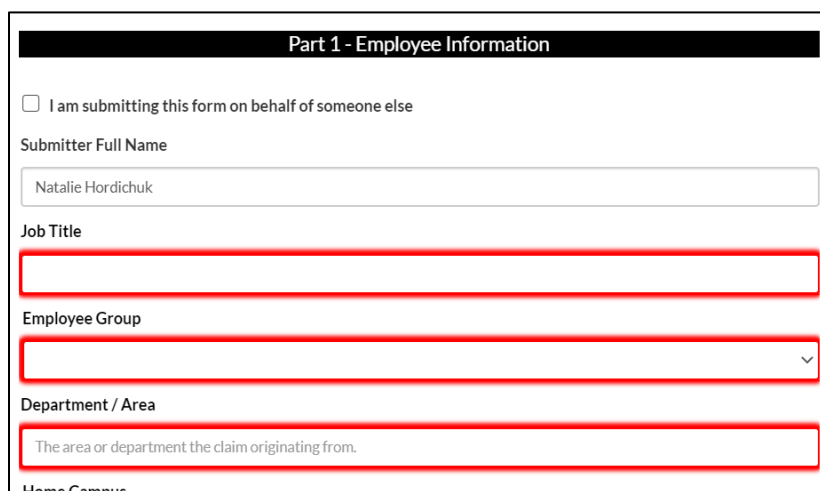
A screenshot of a web form titled "Part 1 - Employee Information". The form contains several fields: a checkbox labeled "I am submitting this form on behalf of someone else", a text field for "Submitter Full Name" containing "Natalie Hordichuk", a text field for "Job Title" which is empty and highlighted with a red border, a dropdown menu for "Employee Group" which is empty and highlighted with a red border, and a text field for "Department / Area" containing "The area or department the claim originating from." and highlighted with a red border. At the bottom left, the text "Home Campus" is partially visible.

Figure 2. Example of how the system highlights required fields after the user has attempted to submit the e-form.

### 3. Attaching supplemental documents

- a) 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 3).

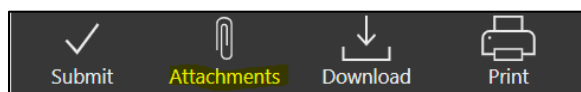


Figure 3. Originator Action Bar

- b) The Attachments box will open. You can attach a document by clicking on the “upload File(s)” link. This will allow you to browse for documents. Only image files (BMP, TIF, JPG, PGN, GIF), PDFs, Word documents, and excel spreadsheets are accepted. The system will not allow uploading of other file types.

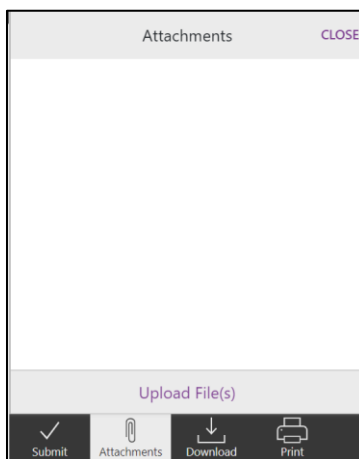


Figure 4. Attachments box

- a) Once the document is attached, it can be edited, deleted, or viewed. Editing the attachment allows for changes to the name and ability to add a description.

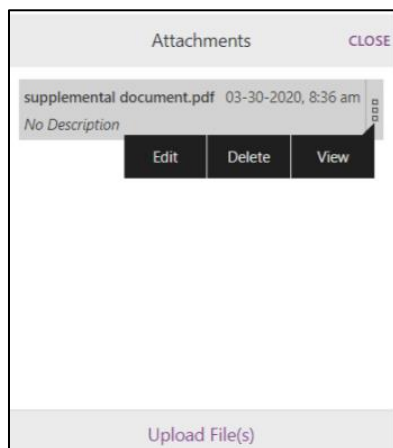


Figure 5. Attachment box with an attached document.

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

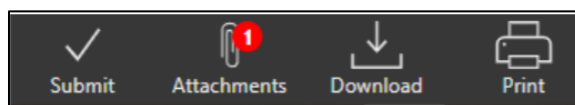
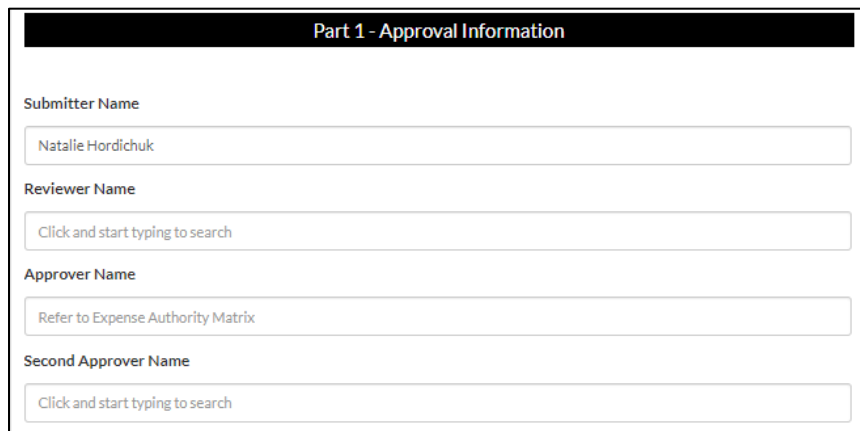


Figure 6. Originator Action Bar showing one document is attached.

## 4. Routing an e-form for approval

- a) Some forms may require the Originator to direct which approvers the form will route to. Click on the reviewer or approver box (Figure 7) 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.



The screenshot shows a form titled "Part 1 - Approval Information" with the following fields:

- Submitter Name:** A text box containing "Natalie Hordichuk".
- Reviewer Name:** A text box with the placeholder text "Click and start typing to search".
- Approver Name:** A text box containing "Refer to Expense Authority Matrix".
- Second Approver Name:** A text box with the placeholder text "Click and start typing to search".

Figure 7. Example of the approver and reviewer search box.

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

## 5. Submitting a completed e-form

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

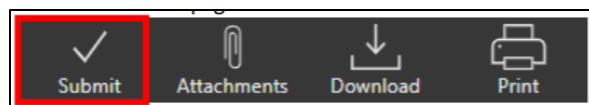


Figure 9. Submit button at the bottom of the webpage.

- b) 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 have them return it to you (see part 8, Tracking an e-forms status in the workflow).

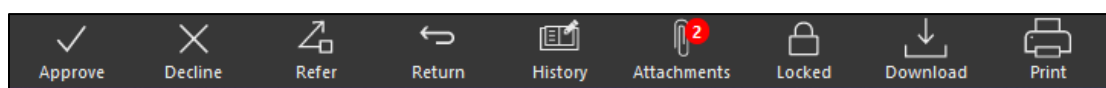


Figure 8. Approver Action Bar options.

## 6. When an external signature is required

- a) In some cases, an external signature may be required on a document. Etrieve is not yet publicly available (update coming April 2022) but there is a quick solution. Once the document has been approved and/or digitally signed by the internal approvers, download the signed document and save it to your computer.
- b) Then, use [DocuSign](#) or Adobe Acrobat to collect signatures
- c) Refer to the DocuSign User Guide for a more detailed explanation on how to route documents for external approval.
- d) In the event the document needs to be signed externally first, use DocuSign or Adobe Acrobat then attach the signed document to your e-form and follow the routing process.



## 7. Drafting an e-form to be submitted later

- a) 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 under the form's header 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.

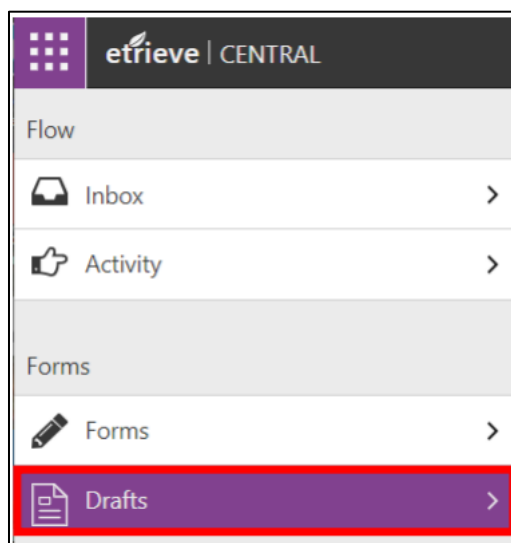


Figure 10. Location where the system stores the user's drafts.

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

- a) To track a previously submitted form's status, click on **Activity** (Figure 11) under the flow heading on the left of the page. Then search for and click on the form that was previously submitted.

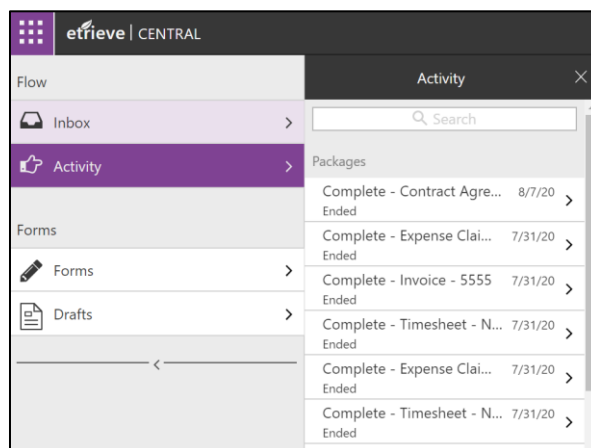


Figure 11. Activity shows all previously submitted forms.

- 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.

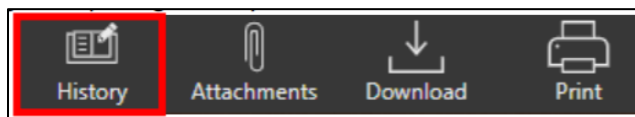


Figure 12. History button at the bottom of the webpage.

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

- a) If a form is returned by an Approver, the Originator will receive an email from [etrieve@okanagan.bc.ca](mailto:etrieve@okanagan.bc.ca) indicating that the form has been returned and is available for review. Comments may be included in the email notification
- b) The Originator can access the form by clicking the link provided in the email or by navigating to their Etrieve **Inbox** and selecting the package.

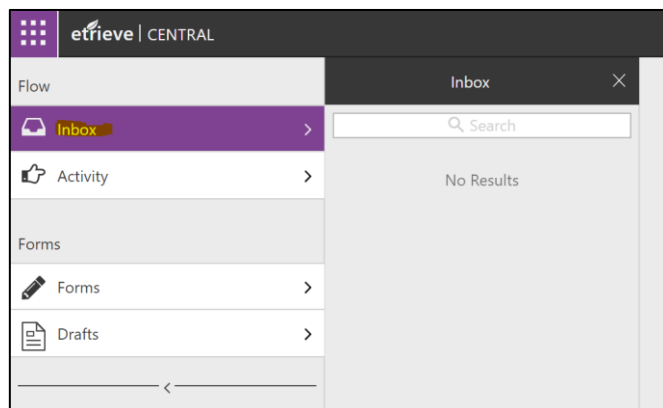


Figure 13. Inbox indicates that a form is waiting to be acted upon.

- c) Comments can be reviewed by clicking on the history button. Complete the approver's request and submit the form again. Comments can be submitted by the Originator if completed before the form is resubmitted.

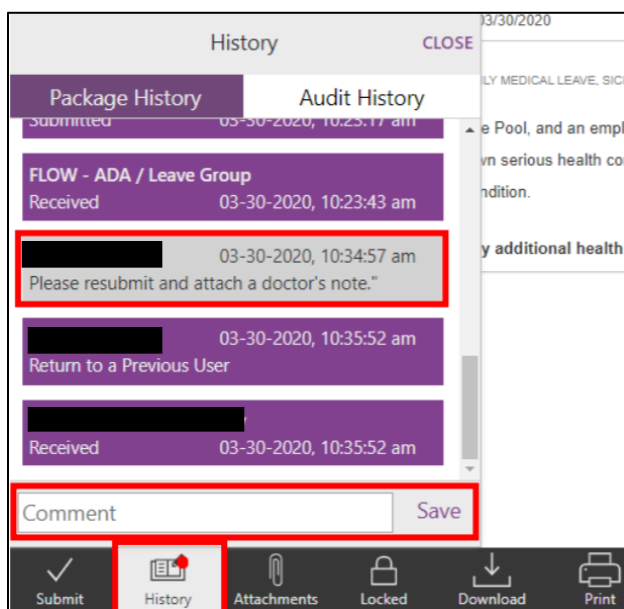
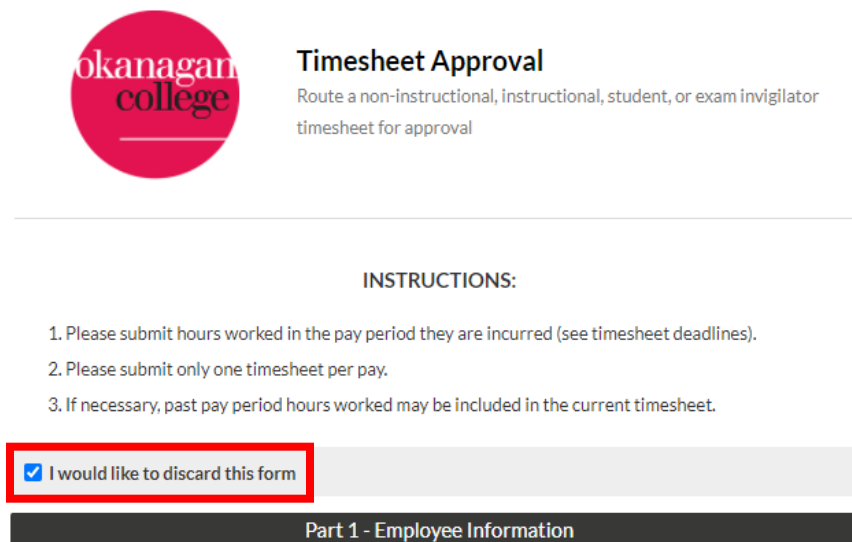


Figure 14. History opened, with Approver's comment viewable.

## 10. Discarding an e-form that has been returned

- a) If an e-form is returned to you and you'd like to discard it and start over, locate the checkbox near the top of the form that states, "I would like to discard this form".



The screenshot shows the Okanagan College logo on the left and the title "Timesheet Approval" on the right. Below the title is a subtitle: "Route a non-instructional, instructional, student, or exam invigilator timesheet for approval". A horizontal line separates the header from the "INSTRUCTIONS:" section. The instructions are a numbered list of three items. Below the instructions is a checkbox labeled "I would like to discard this form" which is checked. A dark grey bar below the checkbox contains the text "Part 1 - Employee Information".

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.

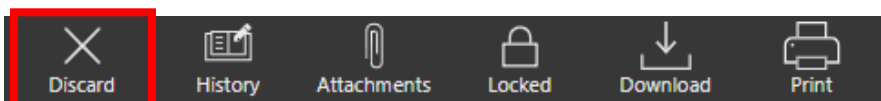


Figure 16. Discard button location.

- 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

- a) All past forms that have been submitted by an Originator can be accessed under the Flow header in the Activity section.

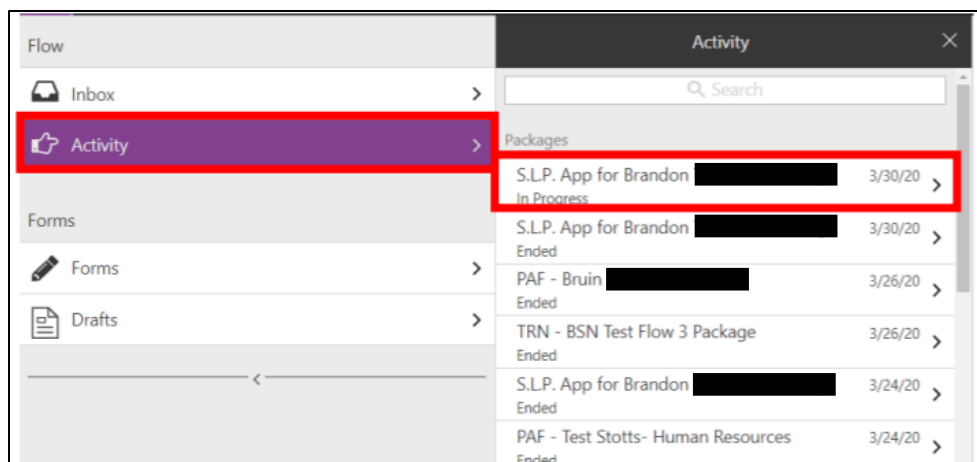


Figure 17. Activity shows all previously submitted forms.

- b) The Originator can download or print a copy of the form at any time by clicking the download or print buttons on the Originator Action Bar at the bottom of the webpage.

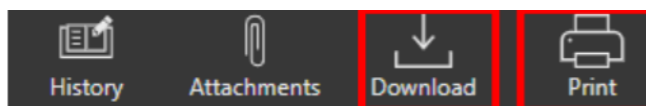


Figure 18. Download and print buttons.

- 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.