okanagan college

IT SERVICES

DIGITAL TRANSFORMATION INITIATIVE

Etrieve - Approver Guide

This guide provides an overview of the following Approver actions:

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1. How to locate an e-Form for approval

a) When an e-Form is submitted, the Approver will receive an email notification (see Figure 1) from etrieve@okanagan.bc.ca indicating that the form is available for review.

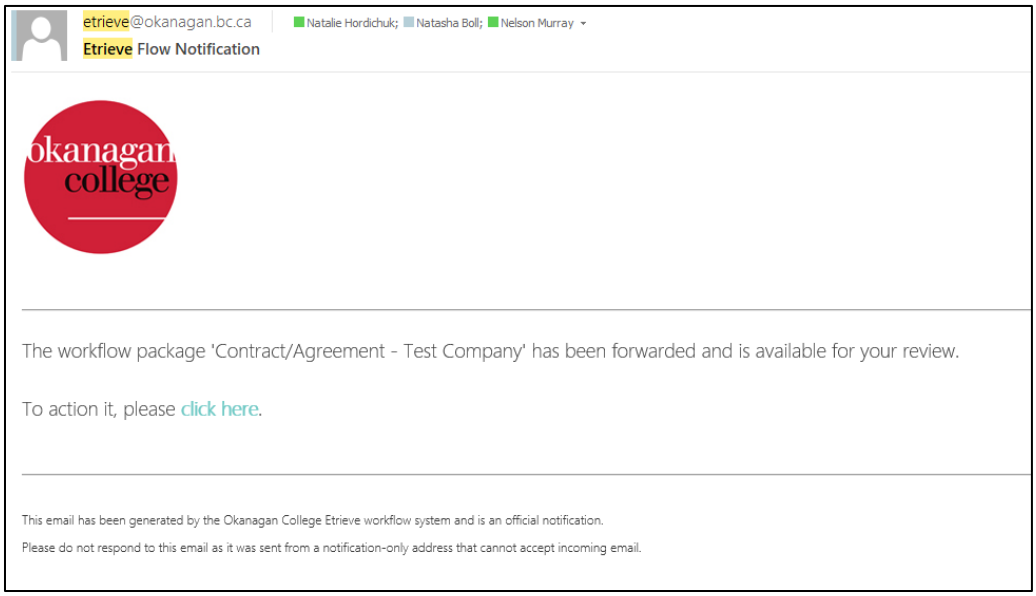
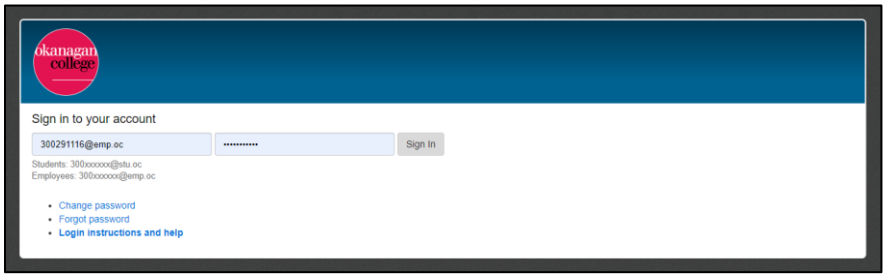


Figure 1. Sample email notification.

b) The approver can access the form by clicking on the link providing in the email and logging-in. Click the inbox, and then click the "package" (see Figure 2).

i. The first time an Approver accesses the system, they will be required to login using the Okanagan College email and password.



ii. Once accessed, the e-Form preview will appear on the right side of the webpage.

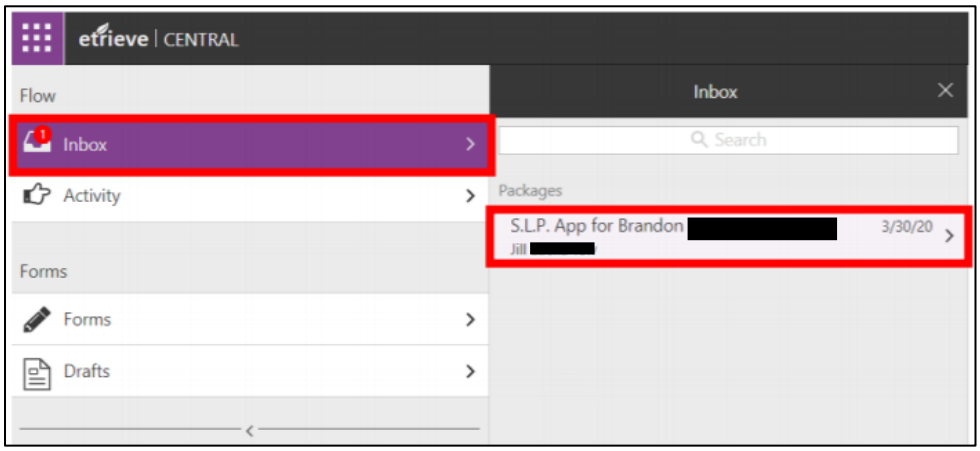


Figure 2. Inbox indicates that a form is waiting to be approved.

iii. e-Forms pending review by the Approver may also be found here in the approver's inbox.

2. Unlocking an eForm for another approver to access

a) Some approval groups contain multiple approvers. Once a form is viewed by one approver, it is locked and cannot be edited or approved by others in the approval group. To have it unlocked, contact the approver that locked the form. If approver is not available, submit an IT Service Request.

Figure 3. Example of a message that appears when an e-Form is locked.

b) To be unlocked, the approver which locked the form must navigate back to the form and click on the locked button at the bottom of the webpage to unlock it.

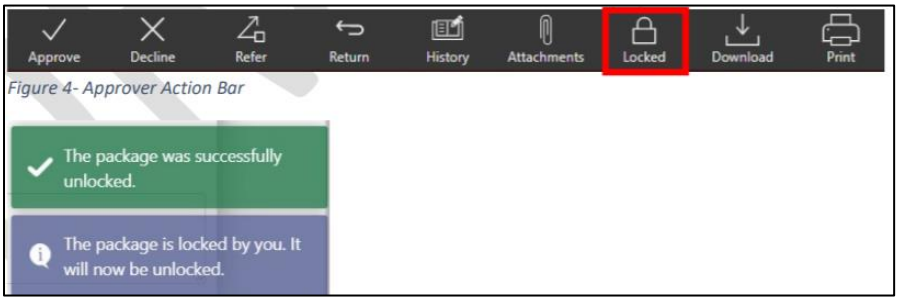


Figure 4. Package locked/unlocked confirmations

3. Reviewing attachments

a) If the originator attached any documents, they can be viewed by clicking on the "Attachments" button at the bottom of the form located in the Approver Action Bar.

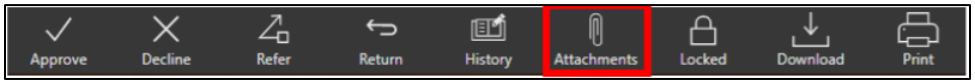


Figure 5. Approver's Action Bar

b) The attachments box opens. The approver can view the document by clicking on the three vertically aligned boxes and select "View". Only image files (BMP, TIF, JPG, PNG, and GIF), Word, Excel, and PDF are accepted. The system will not allow other file types.

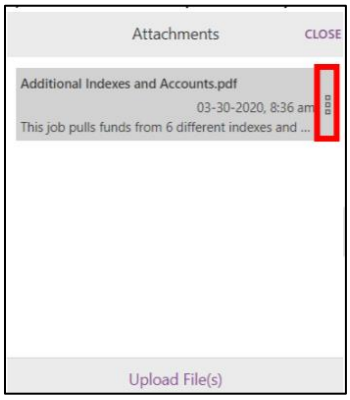


Figure 6. Attachment box with an active attachment.

c) If the attachment is a PDF, it will likely open in a web browser. If the attachment is a picture file, it will likely download to the Approver's computer.

4. Auditing data in an e-Form

a) To audit the data on the form, click the History button on the Approver's Action Box. Then click the audit history tab, and view the changes button.

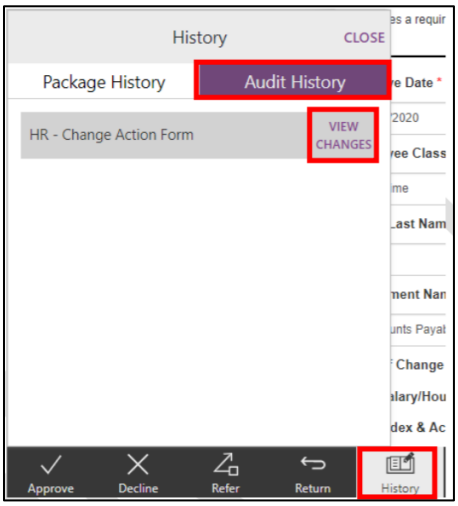


Figure 7. History box to show Audit History.

b) Click on the small information "i" box on a field and the changes window showing when the last change was make in a specific field will appear.

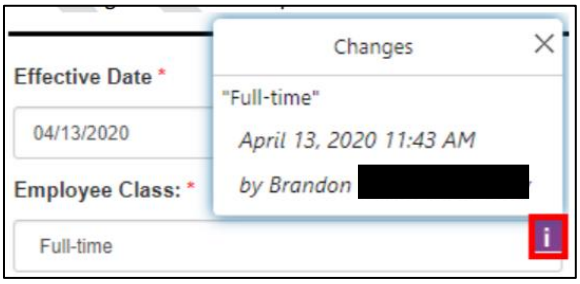


Figure 7. Change history details.

c) To exit the Audit View, click the close button on the blue bar at the top of the form.

5. Approving and digitally signing an eForm

a) Once all required fields and attachments have been completed, click the approve button on the top of the webpage.

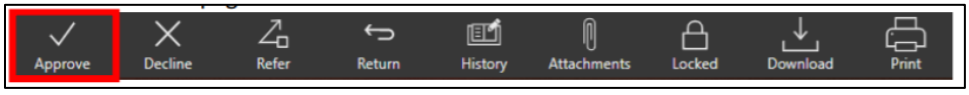


Figure 8. Approver's Action Bar

b) Sometimes a digital or "wet" signature may be required on a contract or agreement. As per the Signing Authority Policy, contracts **over $100,000 require a wet-signature**. To electronically "sign" a document, follow the directions below:

1) Download the document (be sure it is saved as a PDF), save it to your computer before you complete any fields, then open the document in Adobe. Digitally sign the document by clicking on "Fill & Sign" (Figure 9). To set up a digital signature in Adobe, please refer to the Signing Documents through Adobe Signature User Guide located in MyOkanagan.

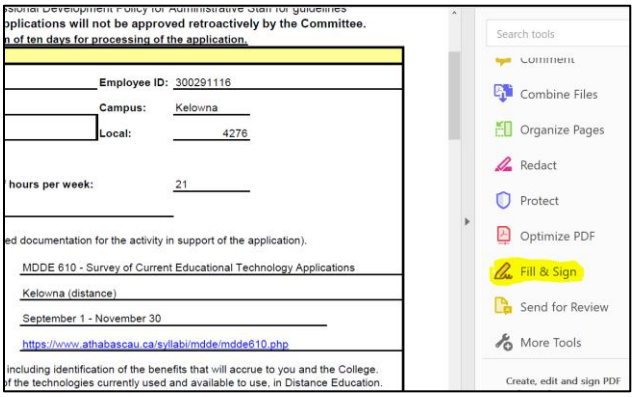


Figure 9. Where to locate the button to digitally sign a document in Adobe.

2) Then click "Me" for who needs to sign first (Figure 10). Locate the area on the document where your digital signature is required.

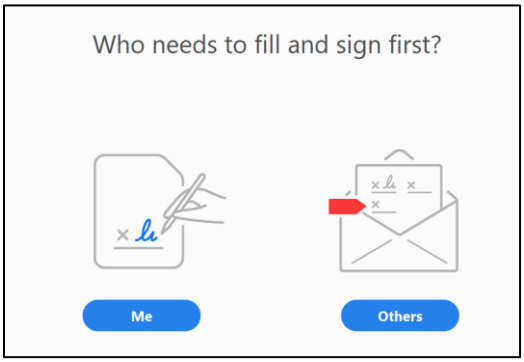


Figure 10. Window that pops up after selecting "Fill & Sign"

3) Then click "Sign" (Figure 11).

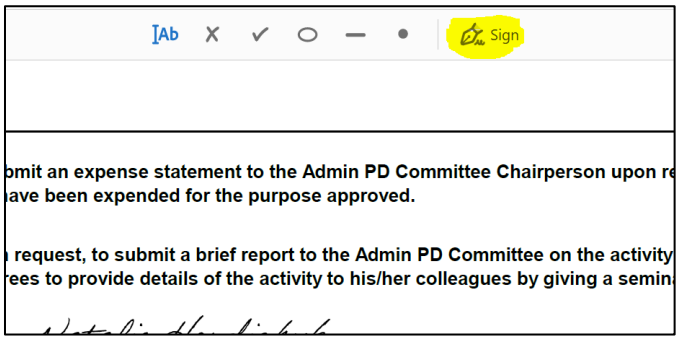


Figure 11. Location of the button to digitally insert a signature.

4) Select your signature and drop it on the signature line.
5) Lastly, go back to the routing form, upload, and attach the digitally signed document then click approve.
6) The other option is to can print, sign, upload, and attach to the signed document to the routing form then click approve.

6. Declining an e-Form

a) Declining a form will, in most cases, terminate the workflow permanently. When the workflow terminates, the form can still be seen in the Activity Tab (see figure 12), but it cannot be re-submitted. If a form is declined by accident, a new form will need to be resubmitted the originator.

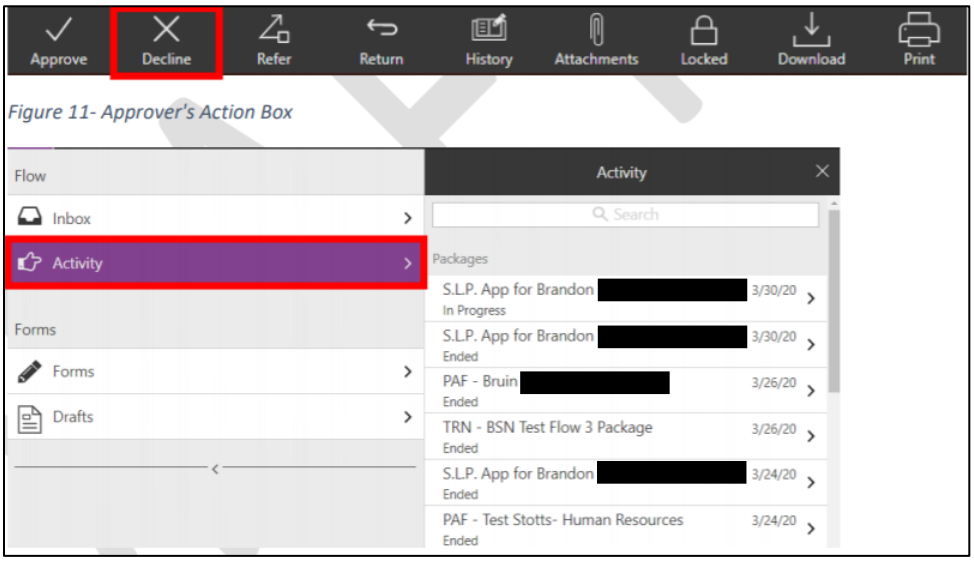


Figure 12. Activity shows all previously submitted forms.

7. Returning an eForm to an originator or an earlier approver in the workflow

a) If an approver declines the form, it will terminate the form and not send it back to the Originator. If the Approver intends to send the form back to the Originator, they should click on the return button in the Approver's Action Box. **Whichever name the approver selects will be where the form is sent back to in the workflow.**

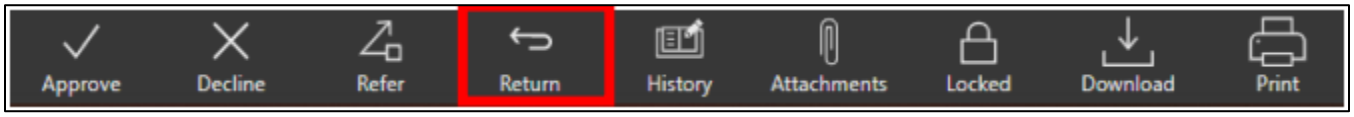


Figure 13. Approver's Action Box

8. Referring an eForm to another User

a) If this feature is available, the Approver can refer the form to another user for review. Caution: Once the eForm has been referred, it is sent outside of the normal workflow. There is not a way to get the form back until the referred user approves the form.

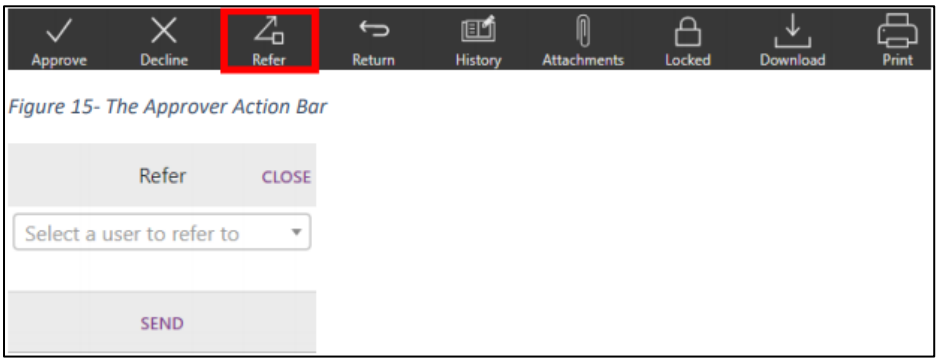


Figure 14. Refer and send box.

a) The referred user has access to approve, view history, upload attachments, download, and print the form.

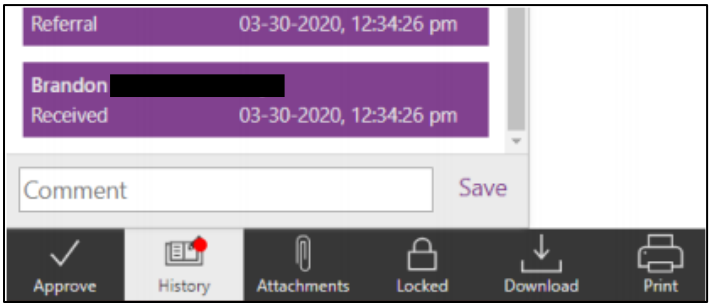


Figure 15. What the Action Bar looks like to a referred user.

b) Example: The refer feature may be used when an approver has a need to send the form to their own supervisor, the originator's supervisor, or if the approver has an administrative assistant that needs to track the form.

9. Tracking an eForm's status in the workflow

a) To track a form's status that has been submitted. Click on "Activity" under the Flow heading on the left of the page. Then click on the form that was previously submitted.

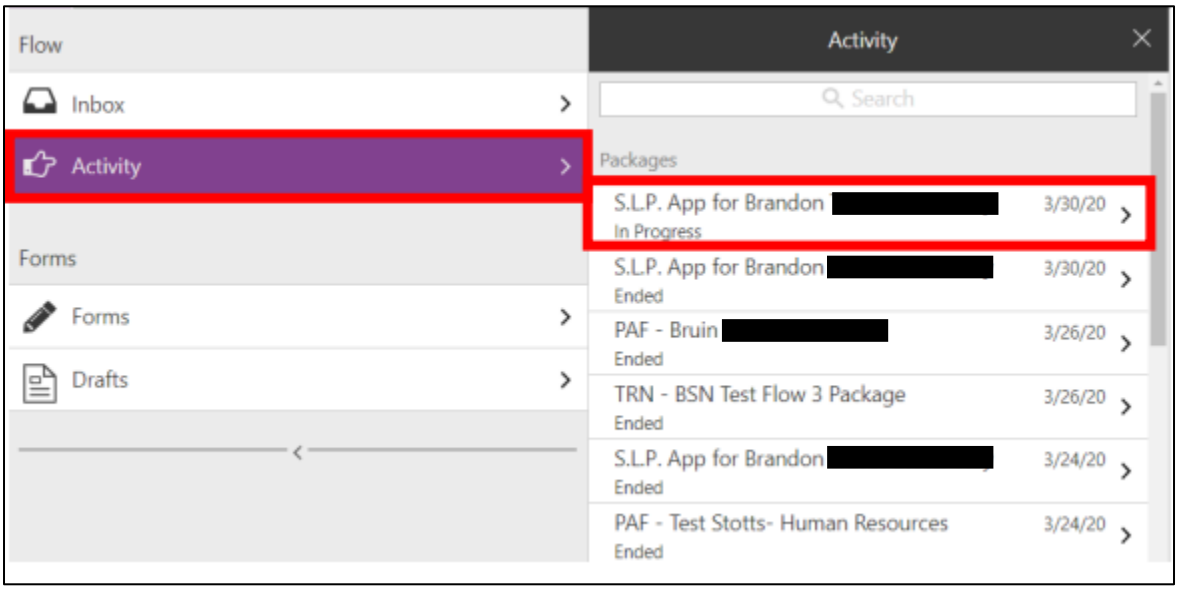


Figure 16. Activity shows all previously submitted forms.

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 17. History button at the bottom of the webpage.

10. Changing and resubmitting an eForm that has been returned

a) If a form is returned by another Approver, an email from etrieve@okanagan.bc.ca will be received indicating that the form has been returned and is available for review.

b) The form can be accessed by clicking the link provided in the email and logging-in. Click inbox, and then click the "package".

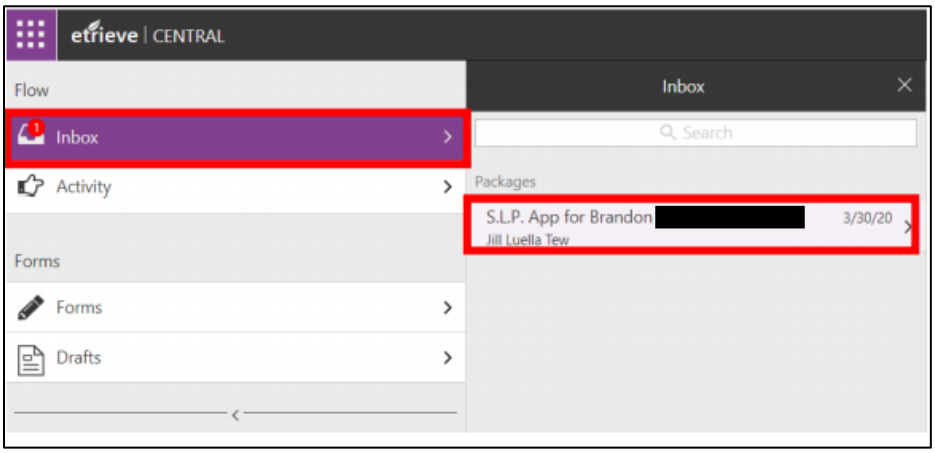


Figure 18. Inbox indicates that a form is waiting to be acted upon.

c) Comments can be reviewed by clicking the history button. Complete the Approver's request and resubmit the form. Comments can be submitted if completed before the form is approved.

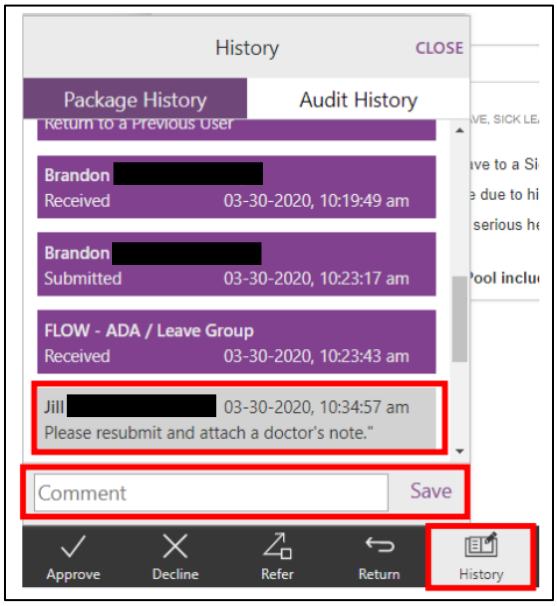


Figure 19. Comments in the history of a package.

11. Downloading and printing an eForm

a) All past forms any user has approved can be accessed in the Activity section as long as they are still an approver for the group.

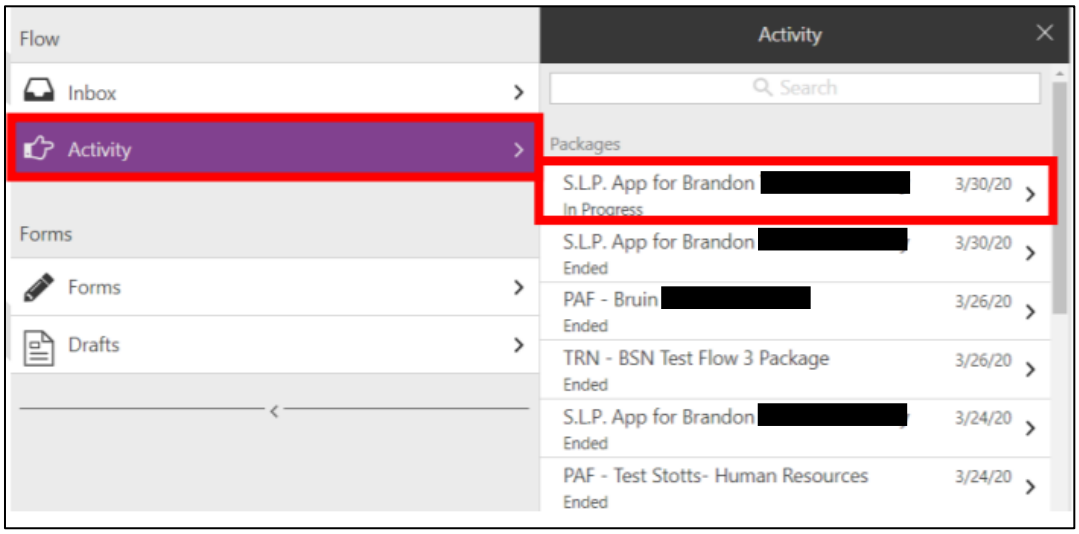


Figure 20. Activity shows all previously submitted forms.

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

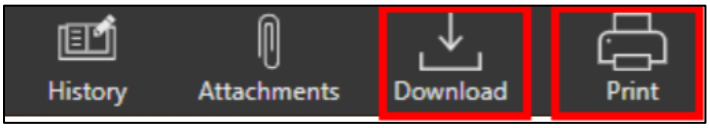


Figure 21. Download and print buttons.