




# WSU E-Forms

Request for Shipment of Merchandise Training  
Office of Procedures, Records, and Forms

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- 
- Sign in procedures
  - How to start, complete, and route a form
  - How to attach scanned files
  - How to make reference copies

# Training Overview

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# **E-FORMS SYSTEM ACCESS**

To access the e-forms system go to:

<http://public.wsu.edu/~forms/eforms.html>

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## WSU E-Forms

See the current training schedule for  
WSU Electronic Forms and enroll online at:  
<http://hrs.wsu.edu/ILT%20Schedule>  
Contact the Office of Procedures, Records, and Forms  
to schedule other training sessions (see Contact Us  
information below).

The WSU E-Forms System is a repository for electronic forms (e-forms) associated with administrative procedures published in the WSU Business and Safety Policies and Procedures Manuals (BPPM and SPPM). Currently, e-form versions of the following forms are available:

- Travel Expense Voucher
- Request for Shipment of Merchandise
- Sponsored Project Activity Request

Additional e-forms are in development.

Users directly access the WSU e-forms using standard Internet browsers, e.g., Internet Explorer, Google Chrome, and Safari. NOTE: Firefox delivers less satisfactory results than other browsers. Through the E-Forms System, WSU users may:

- Open and complete e-forms
- Save drafts of in-progress e-forms

## WSU E-Forms System

For access, sign in with a WSU Network ID and password at:

[WSU E-Forms System Log-In](#)

## Problems?

Some E-Forms System access problems are browser-related.

If you're having problems, be sure to clear the browser cache (temporary storage of webpage data) and restart the browser.

If this doesn't help, contact PR&F for further assistance.

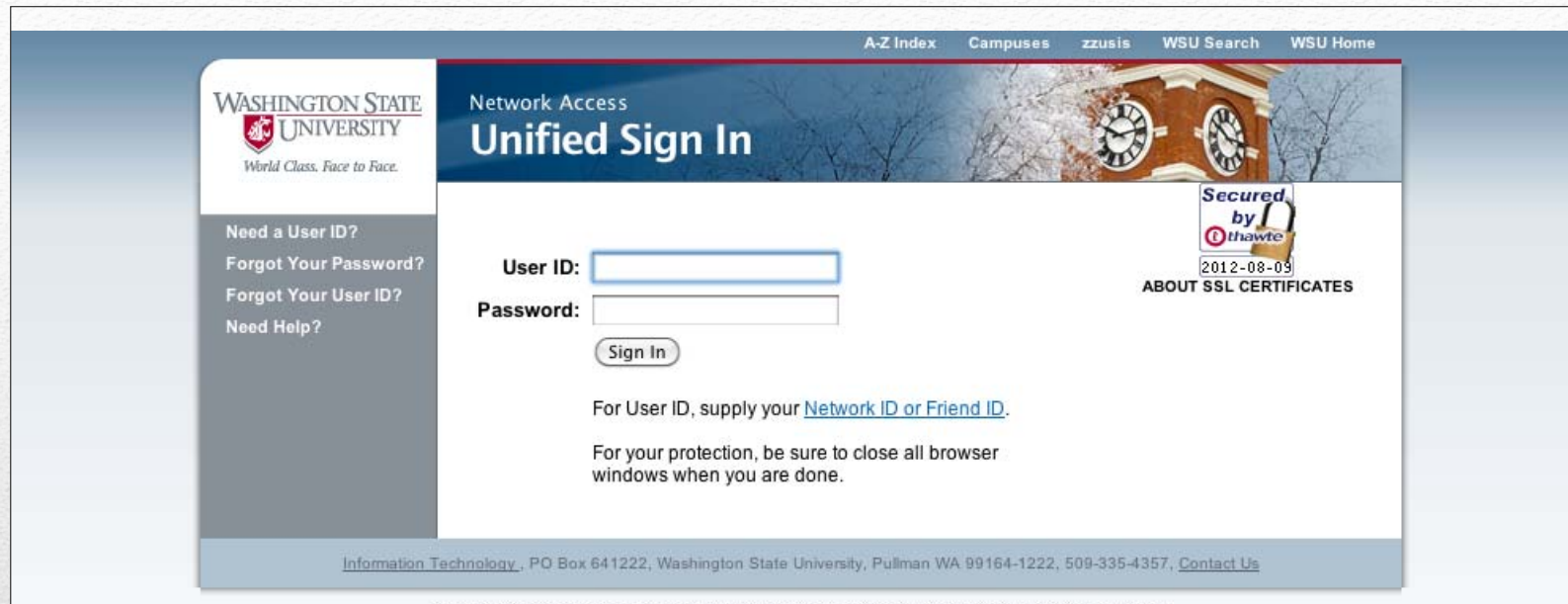
## Help

View and/or print user guidelines by selecting:

- [E-Form Orientation for All TEV Users](#)
- [E-Form Guide for TEV Signers](#)
- [E-Form Request for Shipment Orientation](#)
- [Notification E-mail Set-Up Tips](#)

Click either log-in link to access the log-in page.





The screenshot shows the Washington State University Network Access Unified Sign In page. At the top, there is a navigation bar with links: A-Z Index, Campuses, zzusis, WSU Search, and WSU Home. The main header features the Washington State University logo and the text "World Class. Face to Face." on the left, and "Network Access Unified Sign In" on the right. Below the header, there is a sign-in form with fields for "User ID:" and "Password:", and a "Sign In" button. To the left of the form, there is a sidebar with links: "Need a User ID?", "Forgot Your Password?", "Forgot Your User ID?", and "Need Help?". To the right of the form, there is a "Secured by iThenticate" logo and a date "2012-08-09". Below the form, there is a note: "For User ID, supply your [Network ID or Friend ID](#)." and another note: "For your protection, be sure to close all browser windows when you are done." At the bottom, there is a footer with contact information: "Information Technology, PO Box 641222, Washington State University, Pullman WA 99164-1222, 509-335-4357, [Contact Us](#)".

WASHINGTON STATE UNIVERSITY  
World Class. Face to Face.

Need a User ID?  
Forgot Your Password?  
Forgot Your User ID?  
Need Help?

Network Access  
**Unified Sign In**

User ID:

Password:

[Sign In](#)

For User ID, supply your [Network ID or Friend ID](#).

For your protection, be sure to close all browser windows when you are done.

Secured by iThenticate  
2012-08-09  
ABOUT SSL CERTIFICATES

Information Technology, PO Box 641222, Washington State University, Pullman WA 99164-1222, 509-335-4357, [Contact Us](#)

Enter your Network User ID and password.

# System Sign In

WASHINGTON STATE UNIVERSITY

**E-Forms System**  
CLIENT HOME PAGE

User ID: Deborah Bartlett

LOG-OUT

USER GUIDE

**OPEN**

Form Classifications:

- Favorites
- My Draft Forms
- My Completed Forms
- Workflow
- All Forms
- Shipping and Mailing
- Sponsored Programs
- Travel

Form Templates in Classification/Search Results:

- Input Table Utility | INPUT1
- Request for Shipment of Merchandise | WSU121
- Sponsored Project Activity Request | WSU1326
- Travel Expense Voucher | WSU1005

START NEW

LIST E-FORMS

PRINT BLANK FORM

FIND BY REPORT ID

Form Description:









At the Home Page, select the form classification you want to view. Select the form template you want to use, e.g., Travel Expense Voucher or Request for Shipment of Merchandise. (Note: Only system administrators have access to the Input Table Utility form template.)

# System Home Page



OPEN

Form Classifications:

-  Favorites
-  My Draft Forms
-  My Completed Forms
-  Workflow
-  All Forms
-  Shipping and Mailing
-  Sponsored Programs
-  Travel

Form Templates in Classification/Search Results:

Request for Shipment of Merchandise | WSU121

START NEW

LIST E-FORMS

PRINT BLANK FORM

FIND BY REPORT ID

Form Description:

Request for Shipment  
of Merchandise

Highlight the form template you want to access and click on “Start New.”

# Home Page

## REQUEST FOR SHIPMENT OF MERCHANDISE

**CENTRAL RECEIVING 1120  
WASHINGTON STATE UNIVERSITY**

If WSU pays shipping, please provide the WSU account number (budget project) below to the carrier as a reference. The carrier should include this number on the bill sent to WSU.

DATE

BUDGET	PROJECT

FREIGHT CHARGES

This section completed by department providing merchandise directly to carrier.

DATE SENT
REQUEST NO. 54073
CARRIER
CARRIER TRACKING NUMBERS

### SHIP TO:

BUSINESS NAME		ATTENTION
STREET NO. USE STREET ADDRESS ONLY -- NO PO BOXES		RECIPIENT TELEPHONE NO. (Required)
CITY	STATE	ZIP CODE

SHIP VIA:	<input type="checkbox"/> GROUND	<input type="checkbox"/> AIR 3-DAY	<input type="checkbox"/> AIR 2-DAY	<input type="checkbox"/> AIR 1-DAY	<input type="checkbox"/> PREPAID LABEL	<input type="checkbox"/> AUTO FREIGHT
-----------	---------------------------------	------------------------------------	------------------------------------	------------------------------------	--	---------------------------------------

NO. OF CARTONS	SPECIAL INSTRUCTIONS
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DESCRIPTION OF MERCHANDISE
----------------------------

BILLING <input type="checkbox"/> PAID BY WSU	<input type="checkbox"/> BILL RECIPIENT	RECIPIENT SHIPPING ACCOUNT NUMBER	<input type="checkbox"/> AUTO FREIGHT COLLECT		
DEPT. ACCT	BUDGET	PROJECT	OBJ	INSURE? <input type="checkbox"/> NO <input type="checkbox"/> YES	VALUE PER CARTON

### COMPLETE THIS SECTION IF SHIPPING HAZARDOUS MATERIAL

HAZARDOUS MATERIALS? <input type="checkbox"/> NO <input type="checkbox"/> YES	<input type="checkbox"/> DRY ICE <input type="checkbox"/> OTHER	DETAILED HAZARDOUS MATERIAL DESCRIPTION
HAZARDOUS MATERIAL PACKAGE PREPARER		TELEPHONE

Enter data into the fields as you would with any other automated form.



DATE <div style="background-color: yellow; height: 20px; width: 100%;"></div>	BUDGET <div style="background-color: yellow; height: 20px; width: 100%;"></div>	PROJECT <div style="background-color: yellow; height: 20px; width: 100%;"></div>	
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**SHIP TO:**

BUSINESS NAME <div style="background-color: yellow; height: 20px; width: 100%;"></div>	ATTENTION <div style="background-color: yellow; height: 20px; width: 100%;"></div>
STREET NO.                      USE STREET ADDRESS ONLY – NO PO BOXES <div style="background-color: yellow; height: 40px; width: 100%;"></div>	RECIPIENT TELEPHONE NO. (Required) <div style="background-color: yellow; height: 20px; width: 100%;"></div>
CITY <div style="background-color: yellow; height: 20px; width: 100%;"></div>	STATE <div style="background-color: yellow; height: 20px; width: 100%;"></div>
ZIP CODE <div style="background-color: yellow; height: 20px; width: 100%;"></div>	

SHIP VIA: <input type="checkbox"/> GROUND <input type="checkbox"/> AIR 3-DAY <input type="checkbox"/> AIR 2-DAY <input type="checkbox"/> AIR 1-DAY <input type="checkbox"/> PREPAID LABEL <input type="checkbox"/> AUTO FREIGHT
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Certain fields are required. These fields must be completed before the form can be submitted to workflow. The fields in yellow above are required, as well as “Ship VIA” and “Hazardous Materials?” checkboxes.

# Completing the Form

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The image shows a web form titled "Upload Form" with a URL bar displaying "https://www.wsuforms.com/forms/cgi-bin/iforms/cgi-bin/...". The form is overlaid on a larger form titled "SPECIAL INSTRUCTIONS". The background form has several sections:

- NO. OF CARTONS:** 2
- DESCRIPTION:** pipette tip
- BILLING PA:** ☐ WS
- DEPT. ACCT:** BU
- HAZARDOUS:** ☒ NO
- HAZARDOUS MATERIAL DESCRIPTION:**
- TELEPHONE:**
- COMPLETE THIS SECTION IF RETURNING MERCHANDISE:**
  - PURCHASE ORDER NUMBER:** F
  - FIELD ORDER NO.:** F
  - OR:**
  - K ORDER NO.:**
  - OR:**
  - BLANKET ORDER NO.:** B
  - ITEM NO.:**
  - REASON FOR RETURNING:** ☐ WRONG ITEM ☐ WRONG DELIVERY ☐ REPAIR ☐ DAMAGED ☐ OTHER DESCRIBE BELOW

The "Upload Form" dialog box is open, showing the following fields:

- Choose file:** Choose File samplereceipttesting.pdf
- Rename file:**
- Present list:**
- Description:**
- Buttons:** Upload, Cancel
- Footer:** \* Indicates form not saved

If necessary, attachments may be scanned and uploaded. Select “Attach Files” at the bottom of the screen and browse for your scanned file. Press “Upload” to attach the file.

# Attachments



AUTHORIZED NAME	DEPARTMENT Financial
AUTHORIZED SIGNATURE	PREPARER jones@v
<div>Sign Form</div>	
<div>HELP</div> <div>Attach Files</div> <div>Submit to Workflow</div> <div>Return to Sender</div> <div>Save Draft</div> <div>List Files</div>	

In order to request another employee to review and sign the form, the form must be submitted to workflow. Click the “Submit to Workflow” button below the form.

# Workflow

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## E-Forms System INBOX WORKFLOW PAGE

User ID:jenks

### PERSONAL INBOX

Submit Your Form to Individual(s).

Send to Personal Inbox of E-Forms Client User ID:

dbartl@wsu.edu

ADD

Include comments:

Please review this form and sign it and send it to Central Receiving.

REMOVE

Selections:

dbartl

### GROUP INBOX

Submit Your Form to the Group Inbox(s)

Group Inbox(s):

Selections:

Enter the Network User ID name or complete email address of the intended workflow recipient and then press the “Add” button. Pressing the “Add” button enters the recipient information into the “Selections:” box. You may enter comments for the recipient in the “Comments” box.

# Workflow



The screenshot shows a web form interface. At the top, there are two empty rectangular input fields. Below the left field is a label "Include comments:" followed by a larger empty text area. At the bottom of the form, there is a horizontal bar containing the text "Save your workflow selections and they will be available next time." to the left of a "SAVE" button, and a "CANCEL" button to the right. Below this bar is another horizontal bar with the text "Submit Your Form to Individual(s) or Group Inbox(s)" to the left of a "SUBMIT TO WORKFLOW" button.

At the bottom of the workflow page, press the “Submit to Workflow” button to send an email workflow notification to the reviewing individual.

# Workflow

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## Workflow Notification – ReportID (44588)

jenks@wsu.edu

Sent: Monday, March 31, 2014 4:26 PM

To: Bartlett, Deborah

From [jenks@wsu.edu](mailto:jenks@wsu.edu),

– ReportID (44588)

Please review this form and sign it and send it to Central Receiving.

This message is notification that you have a new "Request for Shipment of Merchandise" E-Form in your Workflow Personal Inbox.

Office of Procedures, Records, and Forms

<https://webapps.wsu.edu/ais/wsueforms>

Whenever you submit a form to workflow, the recipient receives an email notification that he or she has a form to review.

# Workflow Notification

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WASHINGTON STATE UNIVERSITY

**E-Forms System**  
CLIENT HOME PAGE

User ID: Ralph Jenks

**OPEN**

**Form Classifications:**

- Favorites
- My Draft Forms
- My Completed Forms
- + Workflow
- All Forms
- Travel

**Form Templates in Classification/Search Results:**

START NEW

LIST E-FORMS


PRINT BLANK FORM

FIND BY REPORT ID

Form Description:

When the recipient opens the home page, he or she will have workflow items in his or her personal inbox. To access the personal inbox, the recipient clicks on the + (plus) sign in front of “Workflow.”

# Recipient Workflow



# E-Forms System


## CLIENT HOME PAGE


[LOG-OUT](#)  
[USER GUIDE](#)


User ID: Ralph Jenks


OPEN


Form Classifications:


 Favorites


 My Draft Forms


 My Completed Forms

 Workflow

 **Personal Inbox (1)**

 All Forms

 Shipping and Mailing

 Travel

1 Workflow Items

Form Templates in Classification/Search Results:

Request for Shipment of Merchandise | WSU12

[START NOW](#)

[LIST E-FORMS](#)

[PRINT BLANK FORM](#)

[FIND BY REPORT ID](#)

Form Description:

Request for Shipment of Merchandise


Sort By: 

Form Title, list as Title | Number

After making the personal inbox visible, the user highlights personal inbox and the form template. The forms in the inbox may be listed by pressing “List E-Forms.”

# Recipient Workflow





E-Forms System

LIST SAVED E-FORMS

User ID:jenks

CLIENT HOME

SELECT

Personal Inbox : WSU1212 | Request for Shipment of Merchandise

1 Matches | Page 1 of 1

Select	Form Status	ReportID	Date Sent	Carrier	Business Name
<input type="checkbox"/>	Open	44588			Fisher Scientific

Highlight row for functions below

COPY FORM

EDIT FORM

PRINT FORM

REFRESH LIST

Highlight the form and press “Edit Form” to open it.

# Workflow Recipient

		RETURN
AUTHORIZED NAME		DEPARTM Financi
AUTHORIZED SIGNATURE		PREPARE jones@

Sign Form

After the form is completed the expenditure authority electronically signs. The signer clicks the “Sign Form” button. The signature locks most fields on the form. Locked fields cannot be changed unless the signature is removed.

# Signature

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		RETURN A
AUTHORIZED NAME Ralph Jenks		DEPARTME Creamer
AUTHORIZED SIGNATURE Signature On File		PREPARED March 10, 2014
<div>Remove</div>		
<div>HELP</div> <div>Attach Files</div> <div>Submit to Workflo</div> <div>Return to Sender</div> <div>Save Draft</div>		

In order to send the form to Central Receiving it must be submitted to workflow. Click the “Submit to Workflow” button below the form.

# Workflow

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WASHINGTON STATE UNIVERSITY

**E-Forms System**  
INBOX WORKFLOW PAGE

User ID:jenks

**PERSONAL INBOX** Submit Your Form to Individual(s).

Send to Personal Inbox of E-Forms Client User ID:

Include comments:

Selections:

**GROUP INBOX** Submit Your Form to the Group Inbox(s)

Group Inbox(s):

- Workflow
- Group Inboxes
  - ☒ Central Receiving
  - ☐ Travel

Selections:

Select the Group Inbox for Central Receiving and add it to the selections.

# Workflow to Central Receiving



After selecting the Group Inbox for Central Receiving and adding it to the selections, click on “Submit to Workflow” to route the form to Central Receiving.

## Workflow to Central Receiving

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The screenshot shows a web interface titled "GROUP INBOX" with a subtitle "Submit Your Form to the Group Inbox(s)". On the left, under "Group Inbox(s):", there is a tree view with "Workflow" as the root, containing "Group Inboxes". Under "Group Inboxes", there are four items: "Central Receiving", "OGRD -- FedEx RFS Only" (which is highlighted with a blue background), and "Travel". In the center, there are two buttons: "ADD" and "REMOVE". On the right, under "Selections:", there is a text box containing the path "/Workflow/Inbox/OGRD -- FedEx RF".

If the shipping charges are supported by a sponsored program account (projects 11-14) and the shipment is sent by FedEx, route the Request for Shipment of Merchandise to OGRD. OGRD routes the form on to Central Receiving.

## **Workflow to OGRD -- FedEx RFS Only**

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## SHIPMENT OF MERCHANDISE

§ 1120  
E UNIVERSITY

Provide the WSU account number  
as a reference. The carrier should  
contact WSU.

FREIGHT CHARGES

This section completed by department providing  
merchandise directly to carrier.

DATE SENT

REQUEST NO.

44588

CARRIER

CARRIER TRACKING NUMBERS

BUDGET PROJECT

Note the “Request No.” in the upper left of the form. Write this number on the shipping box near the address label. This enables Central Receiving to match the shipment with the electronic form.

Telephone Central Receiving and notify them that the shipment is ready to be picked up.

# REQUEST NO.

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## E-Forms System

### LIST SAVED E-FORMS

[CLIENT HOME](#)

User ID:jenks

**SELECT**

WSU1212 | Request for Shipment of Merchandise

3 Matches

| Page 1 of 1

Select	Form Status	ReportID	Date Sent	Carrier	Business Name
<input type="checkbox"/>	Draft2	43699	2013-10-11	UPS	Amazon Com
<input type="checkbox"/>	Draft2	44567	2013-10-10	FedEx	Amazon
<input type="checkbox"/>	Draft2	44588			Fisher Scientific

Highlight row for  
functions below

[COPY FORM](#)[EDIT FORM](#)[PRINT FORM](#)[REFRESH LIST](#)


Check box(es) for  
functions below

[SELECT ALL](#)[PRINT SELECTED](#)

If during any part of the workflow process you wish to retain a copy for later reference, click on “Print Form” to make a PDF copy that you can file. You can simply save the PDF copy to your hard drive or other digital storage device.


# PDF Reference Copy



- 
- You should now know how to sign into the eforms system.
  - You should be able to access a blank form, complete it, sign it, and submit it to workflow.
  - You should be able to save PDF reference copies.

# Summary

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- Contact the Office of Procedures, Records, and Forms if you have problems with the E-Forms System or require further instruction.
  - Email [prf.forms@wsu.edu](mailto:prf.forms@wsu.edu)
  - Telephone 509-335-2005

# Questions?

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