WSU E-Forms

Request for Shipment of Merchandise Training

Office of Procedures, Records, and Forms

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

Training Overview

E-FORMS SYSTEM ACCESS

To access the e-forms system go to:

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

Procedures, Records, and Forms

WASHINGTON STATE UNIVERSITY

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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.

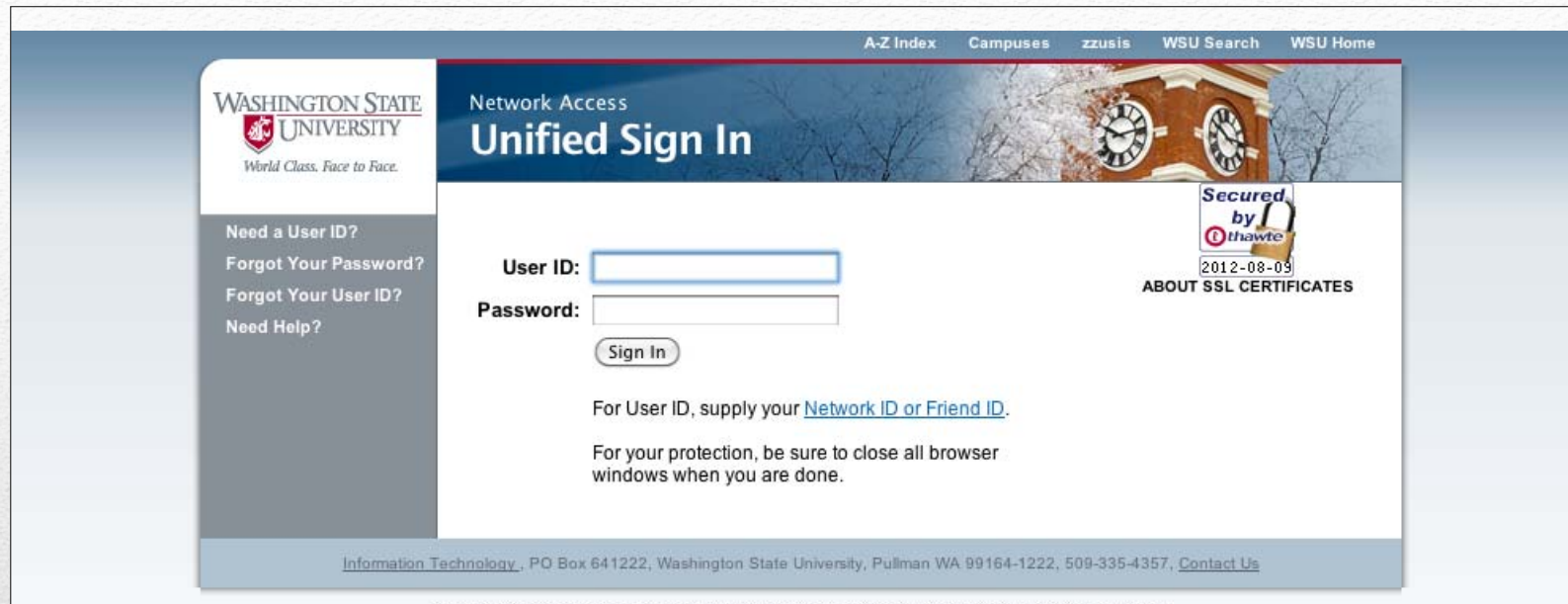If this doesn't help, contact PR&F for further assistance.

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.

Enter your Network User ID and password.

System Sign In

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

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 SENT
REQUEST NO. 54073

FREIGHT CHARGES	CARRIER

CARRIER TRACKING NUMBERS

DATE	BUDGET	PROJECT

SHIP TO:

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

SHIP VIA: ☐ GROUND ☐ AIR 3-DAY ☐ AIR 2-DAY ☐ AIR 1-DAY ☐ PREPAID LABEL ☐ AUTO FREIGHT

NO. OF CARTONS	SPECIAL INSTRUCTIONS

DESCRIPTION OF MERCHANDISE

BILLING	PAID BY ☐ WSU	BILL ☐ RECIPIENT	RECIPIENT SHIPPING ACCOUNT NUMBER _____	☐ AUTO FREIGHT COLLECT

| DEPT. ACCT | BUDGET | PROJECT | OBJ | INSURE? ☐ NO ☐ YES | VALUE PER CARTON _____ |

COMPLETE THIS SECTION IF SHIPPING HAZARDOUS MATERIAL

HAZARDOUS MATERIALS? ☐ NO ☐ YES	☐ DRY ICE ☐ OTHER	DETAILED HAZARDOUS MATERIAL DESCRIPTION _____

HAZARDOUS MATERIAL PACKAGE PREPARER	TELEPHONE

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

DATE	BUDGET	PROJECT	

SHIP TO:

BUSINESS NAME	ATTENTION

STREET NO. USE STREET ADDRESS ONLY -- NO PO BOXES	RECIPIENT TELEPHONE NO. (Required)

CITY	STATE	ZIP CODE

SHIP VIA: ☐ GROUND   ☐ AIR 3-DAY   ☐ AIR 2-DAY   ☐ AIR 1-DAY   ☐ PREPAID LABEL   ☐ AUTO FREIGHT

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

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

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

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

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

Workflow

Workflow Notification – ReportID (44588)

jenks@wsu.edu

Sent: Monday, March 31, 2014 4:26 PM
To: Bartlett, Deborah

From 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

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

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

Highlight the form and press "Edit Form" to open it.

Workflow Recipient

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

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

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

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

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.

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

- 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
- Telephone 509-335-2005

Questions?