WSU E-FORMS SYSTEM
User Guide

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INTRODUCTION

WSU E-Forms System Description

The WSU E-Forms System is a browser-based user interface designed to simplify and manage access to electronic forms (e-forms). The system is accessible to WSU employees who have access to the Internet and a valid Network ID and password.

Requirements

Access

Full access to the system is limited to WSU employees that have an "@wsu.edu" e-mail address. If any employee regularly uses another WSU domain address (i.e., vancouver.wsu.edu; vetmed.wsu.edu) or an outside e-mail (i.e., gmail.com) he or she needs to have a wsu.edu domain e-mail set up and configured to forward messages to the e-mail address he or she regularly uses. This enables the user to receive e-mail notifications sent by the E-Forms System.

The System creates a repository for a new user the first time he or she logs into the System using an "@wsu.edu" e-mail address. The user is then able to send and receive e-forms in the System.

Browser Settings

The browser that is used to access the E-Forms System needs JAVA and pop-ups enabled to ensure suitable performance of the program. Internet Explorer and Chrome browsers are recommended for using the E-Forms System.

Required Use of E-Forms for TEV

WSU employee travelers are required to use the E-Forms System to process Travel Expense Vouchers (TEV).

Use of the E-Forms System is strongly encouraged for processing nonemployee TEVs. The built-in per diem function in TEV e-forms enables users to access current per diem rates, thus avoiding unnecessary research and inaccurate rate entries. The completed e-TEVs may be printed to route for signatures.

Log-In

To log into the WSU E-Forms System, go to public.wsu.edu/~forms/eforms.html and click on the WSU E-Forms System Log-In link (Fig. I).
Sign into the WSU E-Forms System with a WSU Network ID and password (Fig. 2).

Once logged in, the user's Client Home Page displays (Fig. 3).

NOTE: If there is no activity for two hours, the WSU E-Forms System automatically logs out the user (client).
CLIENT HOME PAGE

The Client Home Page is the starting point for all WSU E-Forms-related activities. It displays the login name for the current user and displays all e-form templates and classifications that may be selected and opened by the user.

The Client Home Page consists of the following four sections that are separated by red tabs:

- Open
- Options
- Find Templates
- Search Records

All the functions necessary for E-Forms System users (clients) to process e-forms in the system are found under the Open tab.

The Find Templates and Search Records functions are for *administrative use only*.

Form Classifications

E-Forms are organized in template lists within named classification folders. Every user has the following folders:

- Favorites – A list of form templates optionally placed in the classification folder by the user (see Options Tab).
- My Draft Forms – A list of the incomplete e-forms saved by the user (see Save Draft).
- My Completed Forms – A list of all finalized e-forms created by the user.
- Workflow – The user's Personal Inbox for receiving e-forms from other E-Forms System users.

If a user is authorized to open and edit forms submitted to a workgroup that finalizes e-forms, the Group Inbox that he or she has access to is also located in the Workflow folder (see Workflow Folder).

- All Forms – A list of all the form template groups available in the system.
- Shipping and Mailing – The Request to Ship Merchandise (RSM) form template.
- Sponsored Programs – The Sponsored Project Activity Request (SPAR) form template.
- Travel – The Travel Expense Voucher (TEV) form template.
E-Forms Templates

The following e-form templates are currently available in the system:

- Request for Shipment of Merchandise | WSU 1212
- Sponsored Project Activity Request | WSU 1326
- Travel Expense Voucher | WSU 1005

Click on a classification folder to view the corresponding list of e-form templates in that folder. The list of templates available in the folder displays in the center window under Form Templates in Classification/Search Results.

ileged list of folders above and Fig. 3.)

Click on an e-form template name from the center window to activate the first three Action Buttons on the right side of the Client Home Page. (Fig. 3).

NOTE: There is only one template available in some classification folders. (Refer to the

Empty Classification Folder

The Form Templates in Classification/Search Results displays (((Empty Folder))) if the highlighted classification folder does not contain any e-form templates.
Action Buttons

The following three buttons are activated when an e-form template is highlighted:

- **Start New** (launches a new editable e-form).
- **List E-Forms** (opens the List Saved E-Forms page).
- **Print Blank Form** (creates a blank PDF form).

Starting a New E-Form

The WSU E-Forms System forms are fillable HTML electronic forms (e-forms) that look just like the corresponding WSU hardcopy forms. Perform the following steps to create a new e-form:

1. Highlight the desired Form Classification folder, then
2. Highlight the desired E-Form Template, then
3. Click on **Start New**.

**NOTE:** The **Start New** button is not available from the My Completed Forms and Workflow folders.

List E-Forms

Click on **List E-Forms** to display the List Saved E-Forms page. The list of e-forms varies depending on which classification folder and e-form template is highlighted when the user clicks on **List E-Forms**.

For example, to display the list of all of the draft Travel Expense Voucher forms perform the following steps:

1. Highlight the My Draft Forms folder.
2. Highlight the Travel Expense Voucher | WSU1005 Form Template name in the center window of the Client Home Page.
3. Click on **List E-Forms** *(Fig. 4)*.
List E-Forms (cont.)
The List Saved E-Forms page then lists all of the user's saved draft forms for the Travel Expense Voucher. Refer to List Saved E-Forms Page.

Print a Blank Form
All the WSU E-Forms System templates are also available as PDF files. Click on Print Blank Form to create a PDF file of the e-form template to print and fill in manually or save for future use.

NOTE: The PDF files are not electronically fillable.

Find by Report I.D. Button
The Find By Report ID button is located below the three action buttons on the Client Home Page. The Find By Report ID button enables the user to search for any Report ID or Request No. in the system and view the workflow report for that e-form. (See Workflow Reports).

Options Tab
Click on the Options tab to open the Options section (Fig. 5).

Figure 5 Options Tab
The Options section includes a Suggestion Box button for the user to make inquiries or suggestions about the WSU E-Forms System to the Office of Procedures, Records, and Forms. These suggestions are anonymous unless the user chooses to identify himself or herself.

The Options section also includes buttons that allow the user to add and remove form template names from the user's Favorites folder. By default, the Favorites folder form templates are displayed in the center form list window when the user logs into the E-Forms System. Click on Favorites: Add to place a highlighted Form Template name into the Favorites folder. Click on Favorites: Delete to remove a highlighted Form Template name from the Favorites folder.

The Form Info button shown in the Options section is currently not active.
WORKING WITH E-FORMS IN THE SYSTEM

Changes or additions may be made to an e-form only when it is in edit mode (see Editing E-Forms).

Unique E-Form Identifier

All e-forms have a unique identifying number that is not found on WSU hardcopy forms. The E-Forms System assigns a sequential number to every new e-form that is created. The number is found in the upper-right corner of each e-form. This unique identifying number is labeled Request No. on the RSM, and Report ID on the SPAR and TEV.

⚠️ IMPORTANT: The Request No. / Report ID is the best way to track an e-form in the System. It is highly recommended that users make note of the number when starting a new e-form.

Navigating Through an E-Form

Click on any input field to navigate through an e-form or use the Tab key to move through the fields in reading order. The active field displays a green background.

Required Form Fields

Required fields in each e-form display a yellow background. Required fields must be filled-in before an e-form can be sent through workflow.

TRAVEL EXPENSE VOUCHER E-FORM

Refer to section 95.20 in the WSU Business Policies and Procedures Manual (BPPM) for instructions on completing the specific sections of a TEV.

Per Diem Rates Query Box

The E-Forms System is connected to the federal government per diem rate database. This allows users to enter travel expenses into an e-form through the Per Diem Rates Query without having to manually look up those rates. There are two methods to activate the Per Diem Rates Query box:

Method 1: Double-click in the location field, then type in the city name and select the state within the query box. The query box shows a list of cities at or near the city name (Fig. 6). Double-click on the desired location in the list and close the query box. The location meal rate field automatically populates.

Method 2: Type a city name in the location field and press Enter once. The query box shows a list of cities at or near the city name (Fig. 6). Double-click on the desired location in the list and close the query box. The location meal rate field automatically populates.
Domestic and Foreign Travel Rates

Use the left side of the Per Diem Rates Query window to search for locations within the contiguous (continental) United States (CONUS). Use the right side of the query window to search for any other location in the world.

NOTE: Alaska and Hawaii are found in the Select your Country dropdown menu on the right side of the query window.

Locations Not Included in the Per Diem Rate Database

A few locations are not included in the federal government per diem rate database.

CONUS Locations

The Per Diem Rates Query window displays the standard CONUS rate when users search for a CONUS city that is not in the database (Fig. 7). However, an alternate location may be entered in the e-TEV using the following process:

1. Click on the Domestic U.S. Per Diem Map link in the e-TEV (Fig. 8) to open the General Services Administration (GSA) per diem rate search page.
2. Enter the actual destination in the search criteria. The per diem rate table displays the city nearest in distance and in the same county as the actual destination entered.
3. Enter the nearby city as the destination location in the e-TEV.
4. In the Travel Details section of the e-TEV, note what the actual destination is and that the nearby city is being used because the actual destination is not included in the federal government per diem rate database.
Outside CONUS Locations

When searching for a location outside CONUS that is not listed in the Select a Locality dropdown menu of the query window, select Other from the bottom of the locality selection list (Fig 9).

Meal Rates

Meal rate fields automatically populate with the correct rate from the per diem rate query. In some circumstances meal reimbursement may differ from the per diem. (See BPPM 95.20)

If the meal rate needs to be adjusted, it is important to note that the query function allows a user to manually change the reimbursable meal rate to less than the high cost rate. However, the function does not allow entry of a meal rate more than the high cost rate for the location.
Lodging Rates

The actual cost of lodging must be manually entered in the e-TEV because the actual cost of lodging will likely not match the per diem rate.

If the total lodging cost exceeds the per diem rate for a particular location, a message appears at the bottom of the screen (Fig. 10). Simply ignore the message. (Note: Some browsers show this message in a pop-up window with a cancel option.) If the base room rate (before taxes) does not exceed the per diem, nothing more is required. If the base room rate does exceed the per diem, check the exception box and select a rule number above the Travel Details section of the e-TEV (Fig. 11).

NOTE: If the exception box is checked, the Rule No. dropdown menu becomes a required field.

![Figure 10 Room Rate Exceeds Allowance](image)

Mileage

Total mileage costs are automatically calculated by the system, based on the current private vehicle mileage rate (see BPPM 95.19).

Account Code

The Exp Auth Sign button is available only when the following account code requirements are in place:

- The account code fields, including the budget, project, object, subobject, and amount must be filled in, and
- The total of all listed account coding line amounts must equal the "Amount Due Claimant."

Grant-Funded Supporting Budgets

There is a check box at the top of the Account Code section. If any supporting budget is in programs 11-14 (grant-funded), this box must be checked (Fig. 12).
Grant-funded travel documents have a different retention period than state-funded travel documents. Checking this box helps identify grant-funded e-TEV's for retention purposes.

**Certification and Approval**

The traveler (claimant) electronically signs the e-TEV after reviewing it for accuracy by clicking on the **Claimant Sign** button at the bottom of the Certification and Approval section (Fig. 13). After signing, the claimant submits the form to Workflow or returns it to the sender, depending on departmental practices.

The **Supv. Sign** and **Exp Auth Sign** buttons appear after the claimant's signature is in place. Sometimes one person assumes both the supervisor and expenditure authority roles, in which case that person can sign as both by clicking on both **Supv. Sign** and **Exp Auth Sign**.

**NOTE:** Once the claimant signs the e-TEV, the system does not allow any further changes to be made to the e-form—*with the following two exceptions*:

- Attachments may be uploaded and deleted.
- Account coding may be changed.

If it is necessary to make changes to a signed e-form, *all* signatures must first be removed. Click **Claimant Remove** to remove all signatures that are in place.
Claimant Signature Time Limitation

If the claimant signs the e-TEV more than sixty days after the Trip End Date shown on the form, an Alert Message appears asking for confirmation of acknowledgement that the signature is beyond sixty days of the Trip End Date (*Fig. 14*).

![Signature Acknowledgement Alert](image)

*Figure 14 Signature Acknowledgement Alert*

The claimant clicks **OK** to proceed.

Refer to *BPPM 95.20* for information about the claimant signature time limitation.

Additional Signatures Required

If additional supervisor and/or expenditure authority signatures are required, check the indicated box to the right of "Certification and Approval."

⚠️ **IMPORTANT**: After checking the box, it is necessary to either save the e-form as a draft or send the e-form through Workflow to activate the **Supv. Sign** and **Exp Auth Sign** buttons on the second page.
SPONSORED PROJECT ACTIVITY REQUEST E-FORM

Start a new Sponsored Project Activity Request (SPAR) e-form from the Client Home Page (see Starting a New E-Form).

Refer to BPPM 40.23 for instructions on completing the SPAR.

Required Fields

The Home Account No. and Explanation fields are always required in a SPAR e-form. Additional fields in the e-form may become required when the Guarantee or Other section is completed. Which fields become required depend upon the box that is checked.

Net Effect Field

If the Net Effect field does not equal zero, the e-form cannot be sent through Workflow.

Approvals

The Principal Investigator or Director signs the completed e-form by pressing PI/Director Sign at the bottom of the e-form.

After the PI or Director signs the e-form, it must be saved as a draft or sent through Workflow to activate the Dept Chair Sign button.

After the Department Chair signs the e-form, it must be saved as a draft or sent through Workflow to activate the Dean/Director Sign button. (Note: The Dean/Director signature is only required if one of the Guarantee checkboxes is selected.)

Refer to BPPM 40.23 for an explanation of the approval process.

REQUEST FOR SHIPMENT OF MERCHANDISE E-FORM

Start a new Request for Shipment of Merchandise (RSM) e-form from the Client Home Page (see Starting a New E-Form).

Refer to BPPM 80.15 for instructions on completing the RSM form.

Required Fields

The RSM includes the following required fields:

- Business name, address and telephone fields
- Ship via (must select one option)
- Hazardous materials (must select yes or no)
- Name of sending department
Authorization of the E-Form

The RSM form requires only one signature. Click on Sign Form to populate both the Authorized Name and Authorized Signature fields with the user's name and digital signature.

BOTTOM NAVIGATION FRAME

At the bottom of the browser window a second window frame holds a series of buttons used to manage an e-form (Fig. 15).

![Figure 15 Navigation Buttons to Process E-Forms](image)

The button functions are as follows:

**Help** – Open the help documentation for the current form template. *(Note: The Help documentation is currently unavailable.)*

**Attach Files** – Attach an external file (e.g., scanned image, PDF, etc.) to the e-form.

**List Files** – Show all of the files attached to the e-form.

**Submit to Workflow** – Send the e-form to another user or Group Inbox (see Workflow).

**Return to Sender** – Return the e-form to the person who sent it to you.

**Save Draft** – Save the e-form for later editing.

**Finalize** – *This button is used only by administrative offices responsible for providing final approvals.*

**Cancel** – Return to the classification folder without saving the e-form.

Using the Bottom Frame Buttons

**Attaching Files**

Supporting documentation may be uploaded as an attachment to any e-form. Files no larger than 150 MB in any format may be uploaded. There is no limit on the number of files that may be uploaded. Word documents, image files, or PDF files are the most commonly used formats.

Two or more receipts may be scanned to one 8 ½ X 11 page, and any number of pages may make up one file. All images and text in the file **must** face upward to avoid the need to rotate pages in order to be legible.
Filename Requirements

Name the file with alphanumeric characters only and no spaces in the filename.
EXCEPTION: An underscore may be used in the filename (e.g., hotel_receipt.pdf)

 عليهم: Attachments with filenames that contain spaces or special characters often cannot be opened by other users or may create multiple copies of the same.

Uploading Attachments

Click on Attach Files in the bottom navigation frame to activate the Upload Form window (Fig. 16). Click on Choose File to select the file to upload. Rename the file if needed, then click on Upload. Repeat the process for each attachment that needs to be uploaded.

 عليهم: The e-form needs to be either saved as a draft or sent through workflow for the uploaded file(s) to stay attached. The Upload Form window indicates that an e-form is not saved by displaying an asterisk before the attachment filename (Fig. 17).

Viewing List of Attachments

The List Files button activates when at least one attachment has been uploaded to an e-form. Clicking on the List Files button displays an Attachment List window (Fig. 17).

A user may open or delete any of the attachments in the list, using the buttons at the bottom of the Attachment List window.

Save Draft

Users may want to save a draft of an e-form to complete at a later time, use as a template, or print a hardcopy. Click the Save Draft button to save an e-form in the Draft Forms folder.
**E-Form Templates**

💡 TIP! Users often need to create e-forms that contain the same information (e.g., a faculty member that travels often, or a parcel that is shipped to the same location on a regular schedule). In cases like this, the user may save a partially filled e-form in the Draft Forms folder as a template.

Each time a new e-form is needed that contains the commonly-used information, the user makes a copy of the template. The copy contains all the information contained in the template, but it has a new Report ID or Request No. (Refer to [Copying E-Forms](#)).

**Printing an E-Form to Process Manually**

When processing e-forms that are not finalized electronically (e.g., TEVs for non-employee travelers), click on **Save Draft** to save the filled-in e-form. From the List Saved E-Forms page, highlight the e-form and click on **Print Form** to print a PDF hardcopy. Route the printed PDF file for signatures and finalization.

**Return to Sender**

Depending on individual department processes, e-form recipients may want to return an e-form to the sender. The e-form may be returned to the sender through the workflow process (see [Workflow](#)). However, clicking on **Return to Sender** sends the e-form directly back to the sender without the need to enter his or her username or email in the system.

⚠️ NOTE: The function behind the Return to Sender option sends the e-form back one step in the workflow process. Therefore, if the original sender sends an e-form to a recipient from his or her Draft Forms folder, the e-form returns to the sender's Draft Forms folder when the recipient sends the e-form back using the **Return to Sender** button. Likewise, if the original sender sends an e-form to a recipient from his or her Personal Inbox, the e-form returns to the sender's Personal Inbox when the recipient sends the e-form back using the **Return to Sender** button.

**Finalizing an E-Form**

The administrative office responsible for providing final approval clicks on **Finalize** to complete the form process. After an e-form is finalized, it automatically moves to the originator's Completed Forms folder.

The finalization process applies to e-forms that include full electronic processing. If a hard copy of an e-form is printed to be processed manually, the finalization step is not used in the E-Forms System.
WORKFLOW

Inbox Workflow Page

Click on **Submit to Workflow** to send an e-form to a specific recipient's Personal Inbox or a Group Inbox. Clicking on **Submit to Workflow** opens the Inbox Workflow page (Fig. 18).

Send the e-form to the Personal Inbox of an individual user or to a Group Inbox from the Inbox Workflow page.

**Send to Personal Inbox**

Enter the recipient's WSU network I.D. or email address in the left field and then click on **Add**. The recipient's network I.D. appears in the right Selections box and the **Submit to Workflow** button at the bottom of the window becomes active (Fig. 19). Click on **Submit to Workflow** to finish the process of sending the form to the recipient.

⚠️ **IMPORTANT**: The system allows users to add more than one recipient in the Selections box. However, it is highly recommended that users send an e-form to only one recipient. E-forms cannot be opened and viewed by more than one user at a time.

![Figure 18 Send Filled-In E-Form to Another User or Group](image)

![Figure 19 Click on [Submit to Workflow] Button](image)
Send to Group Inbox

Send a filled-in e-form to a Group Inbox when the form is ready to be finalized. By default, all users have access to the following group inboxes:

- Central Receiving
- OGRD
- Sponsored Programs
- Travel

Highlight the Group Inbox name in the left field and then click on Add. The Group Inbox name appears in the right Selections box and the Submit to Workflow button at the bottom of the window becomes active (Fig. 19). Click on Submit to Workflow to finish the process of sending the e-form to the group.

Save Workflow Selections

The Save button, located at the bottom of the screen on the Inbox Workflow page automatically saves a workflow selection in the Selections box.

To save a workflow selection, add the individual or group selection to the Selections box, then click on Save. The workflow selection then automatically appears in the Selections box on the Inbox Workflow page every time the user sends an e-form through workflow.

To remove an automatic workflow selection, highlight the workflow selection in the Selections box, click on Remove, then click on Save.

NOTE: A workflow selection should only be saved in the rare case that a user sends e-forms to the same individual or group every time he or she uses the system.

Workflow Folder

Personal Inbox

When a user sends an e-form through Workflow, the e-form recipient receives an email notification that the e-form is available in his or her Personal Inbox that is located within the Workflow folder on the Client Home Page. The recipient opens the Workflow folder to access the Personal Inbox. When one or more e-forms are available in the recipient's Personal Inbox, the folder text appears in bold and shows the number of e-forms available in parentheses (Fig. 20 indicates the Personal Inbox contains one e-form).

![Figure 20 Form Is Available in Personal Inbox](image-url)
LIST SAVED E-FORMS PAGE

WSU E-Form System users are likely to need to recall some of the e-forms at some point to perform any of the following functions:

- Continue filling a draft form.
- Print a copy of a filled form.
- Start a new form from a copy of a previously filled form.

To list e-forms, select the desired form template on the Client Home Page and click on List E-Forms. This option may be accessed from any form classification folder.

Click on any of the text in a form row in the list, which highlights the row in blue. This activates the Copy Form, Edit Form, and Print Form buttons on the upper right side of the window.

Editing E-Forms

Highlight an e-form record from the list to edit (Fig. 21), then click on Edit Form.

Complete the form fields as needed, then go to the bottom frame and click on Save Draft to save the e-form for further editing, or click on Submit to Workflow to send it to another user for their input or approval (Fig. 15). (See Using the Bottom Frame Buttons).

Copying E-Forms

The Copy Form option may be used to create a new e-form that already contains often-used information, (i.e. a common travel itinerary). To copy an e-form, highlight the e-form record in the e-forms list and click on Copy Form. A new e-form appears that contains the same information as the copied e-form, but it has a new Report I.D. / Request number. Update the necessary information in this new e-form and route it as needed.
Copying E-Forms (cont.)

*TIP:* If the same travel itinerary is often-used, the originator may enter the travel information that does not change on a new e-TEV, then save it in his or her Draft Forms folder to use specifically as a template to copy.

Printing E-Forms

Click on **Print Form** to open a PDF file of the e-form to download or print from within the browser.

Selecting Multiple E-Forms

Print List or Export Multiple E-Forms

Click on one or more checkboxes in the Select column to activate the **Print Selected**, **Print List**, and **Export List** buttons on the lower right side of the window. The **Select All** button at the top of that group of buttons is always active. (Fig. 22).

*Print Selected*

The **Print Selected** button creates a PDF of only the first selection in the list. **NOTE:** It does not create a PDF of all the e-forms when more than one is selected.

*Print List*

The **Print List** button creates a list of all the selected e-forms that includes pertinent information for each e-form (Fig. 23).

*Export List*

The **Export List** button creates a .csv file that opens in Excel.
Searching E-Forms

Use the Search List features at the bottom of the List Saved E-Forms page to search within the list of e-forms (Fig. 24).

⚠️ **NOTE:** The e-form originator may use the List E-Forms option to find the location of a form in workflow (see [Review Current Recipient of Workflow Item](#)).
WORKFLOW REPORTS

Review Current Status of Workflow Item

Review the entire workflow process for a particular e-form by searching on the unique Report ID / Request No. of a form.

To find the Report ID or Request No. of a form, go to the Client Home Page and select the desired form template from the All Forms or applicable subject folder (e.g., the Travel folder), then click on **List E-Forms**. In the list of forms, note the Report ID / Request No. associated with the e-form.

Navigate back to the Client Home Page and click on **Find By Report ID** (Fig. 25). The **Find By Report ID** button opens the Display Report page, which enables the user to search for any Report ID or Request No. in the system and view the workflow report for that e-form.

![Figure 25 Find an E-Form Using the Report ID](image)

Enter the Report ID / Request No. (e.g., 102527) and click on **Find Report** on the Display Report page (Fig. 26). When the report is found click on **Display WF Report** to view the complete workflow report for the e-form.

**NOTE:** The **Display Report** button above the **Display WF Report** button opens the e-form as a PDF file. This option is available only to the originator of the e-form.
Review the **Open From** and **Submit To** column entries in the Workflow Report to see where the e-form is currently located (Fig. 27). The **Submit To** column entry is where the e-form currently resides. The **Open From** column entry shows the previous location of the e-form (where it was sent from).

If the **Submit To** entry displays (Finalized), it is currently in the e-form originator's Completed Forms folder.

![Figure 27 Workflow Report](image)

**TIP:** If the Open From entry and Submit To entry display the same network ID name, it is likely that the sender failed to click on **Submit to Workflow** on the Inbox Workflow Page to confirm sending the e-form to the next recipient (Fig. 19).
Review Current Recipient of Workflow Item

An e-form originator may review the last user or group to whom an e-form was sent in Workflow.

From the Client Home Page, select the desired e-form template from the All Forms or applicable subject folder (e.g., the Travel folder), and click on List E-Forms.

When the originator holds the cursor over the Form Status for an e-form, the name of the e-form and the e-mail address of the recipient’s inbox appears in a pop-up window (Fig. 28).

![Image](image.png)

Figure 28 Reviewing Recipient of Item Sent in Workflow
# TROUBLESHOOTING

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attachments</strong></td>
<td></td>
</tr>
<tr>
<td>System creates numerous copies of a single file attachment.</td>
<td>Remove all the attachment copies. <em>(For assistance with removing very large quantities of attachments, contact the Procedures, Records, and Forms office.)</em> Rename the attachment file using only alphanumeric characters and no spaces, then reattach it to the e-form. If the attachment file is correctly named, and the system still creates numerous copies, the e-form is likely corrupt and a new one should be created. See <a href="#">Filename Requirements</a>.</td>
</tr>
<tr>
<td>E-form attachment cannot be viewed.</td>
<td>The attachment may have become corrupt. The originator should remove the corrupt file and rescan and upload the attachment again. Ensure the attachment filename contains no spaces or special characters.</td>
</tr>
<tr>
<td><strong>Bottom Frame</strong></td>
<td></td>
</tr>
<tr>
<td>The buttons at the bottom of the e-form are not showing.</td>
<td>The E-Form System browser window is split into two “frames,” and the buttons reside in the bottom frame. Be sure the browser window is not in full screen mode, then drag the bottom of the screen up a bit by moving the cursor over the bottom frame dividing line and dragging the line up. The bottom frame that contains the buttons appears. You may need to scroll the bottom frame up or down a little to view the buttons.</td>
</tr>
<tr>
<td><strong>Error Messages</strong></td>
<td></td>
</tr>
<tr>
<td>The TEV Per Diem Rates Query window displays an error message or is not allowing the user to add locations.</td>
<td>Check the trip start and trip end dates for accuracy. Clear out the browser cache (history and cookies) and be sure pop-ups are enabled.</td>
</tr>
<tr>
<td>The error message “form is locked” displays when trying to open an e-form.</td>
<td>Logout and close the browser, then wait <strong>two</strong> hours for the system to unlock the form. Clear the browser cache (history and cookies) before logging back in to the system. To help avoid this issue, use the E-Forms System navigation buttons, rather that the browser back button to move to a different page in the system.</td>
</tr>
<tr>
<td>The error message “Form window is blocked!” displays when trying to open an e-form from the List Saved E-Forms page.</td>
<td>Enable pop-ups in the browser settings.</td>
</tr>
</tbody>
</table>
## TROUBLESHOOTING (cont.)

<table>
<thead>
<tr>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>A message appears stating “Did not pass form level validation. Not saved yet.” when trying to submit the e-form to workflow.</td>
<td>A required form field is not filled in. See <a href="#">Required Form Fields</a>. The <strong>Net Effect</strong> field in an e-SPAR form does not equal zero.</td>
</tr>
</tbody>
</table>
| A "thank you" message displays when trying to add attachments to an e-form. | - Enable pop-ups in the browser.  
- Delete the browsing history.  
- Use a different browser. |
| **TEV Form**                                                        |                                                                          |
| The "additional signatures required" box is checked, but the second page does not show any signature buttons. | Save the e-TEV as a draft, or send it through Workflow. See [Claimant Signature Time](#) Limitation  
If the claimant signs the e-TEV more than sixty days after the Trip End Date shown on the form, an Alert Message appears asking for confirmation of acknowledgement that the signature is beyond sixty days of the Trip End Date *(Fig. 14)*.  
The claimant clicks OK to proceed.  
Refer to **BPPM 95.20** for information about the claimant signature time limitation. Additional Signatures Required. |
| The TEV Per Diem Rates Query window displays the standard low cost rate for a location that is in a higher cost area. | Check the trip start and trip end dates for accuracy. See [Locations Not Included in the Per Diem Rate Database](#). |
| The incorrect per diem meal rate appears for the location that is chosen. | The TEV form reads the daily date (first column under Trip Information) as being in the same year as the Trip Start date.  
*Example:* The Trip Start Date is 12/27/2018 and the Trip End Date is 1/5/2019. When the daily trip information for 1/2/2019 is entered, the TEV form displays the per diem rate for 1/2/2018, rather than 1/2/2019.  
Solution: In the above example, when entering daily trip information for 1/2/2019, temporarily change the Trip Start Date to 1/1/2019. Change the Trip Start Date to the correct date after entering all the daily information. |
<p>| <strong>Workflow</strong>                                                        |                                                                          |
| The <strong>Add</strong> button is grayed out when trying to select a Group Inbox on the Inbox Workflow page. | Remove any individual users from the Selections box in the Personal Inbox area of the page. The system does not allow e-forms to be sent to individuals and groups simultaneously. |</p>
<table>
<thead>
<tr>
<th>An individual or group selection automatically appears in the Selections box on the Inbox Workflow page.</th>
<th>Remove the individual(s) or group from the Selections box by using the <strong>Remove</strong>. Then click on the <strong>Save</strong> button at the bottom of the window. See <a href="#">Save Workflow Selections</a>.</th>
</tr>
</thead>
<tbody>
<tr>
<td>An e-form was sent to a person who is no longer a WSU employee.</td>
<td>Contact the Procedures, Records, and Forms office; telephone 509-335-2005, or e-mail <a href="mailto:prf.forms@wsu.edu">prf.forms@wsu.edu</a>.</td>
</tr>
</tbody>
</table>
RESOURCES

E-Form System users may download a frequently asked questions list to use as a quick desktop reference.

https://policies.wsu.edu/prf/documents/2017/08/e-forms-faq.pdf/

This short step-by-step guide for reviewing and routing TEV forms is helpful for infrequent E-Form System users that just need to review and sign their TEV forms.

https://policies.wsu.edu/prf/documents/2017/08/travelers-basic-guide.pdf/