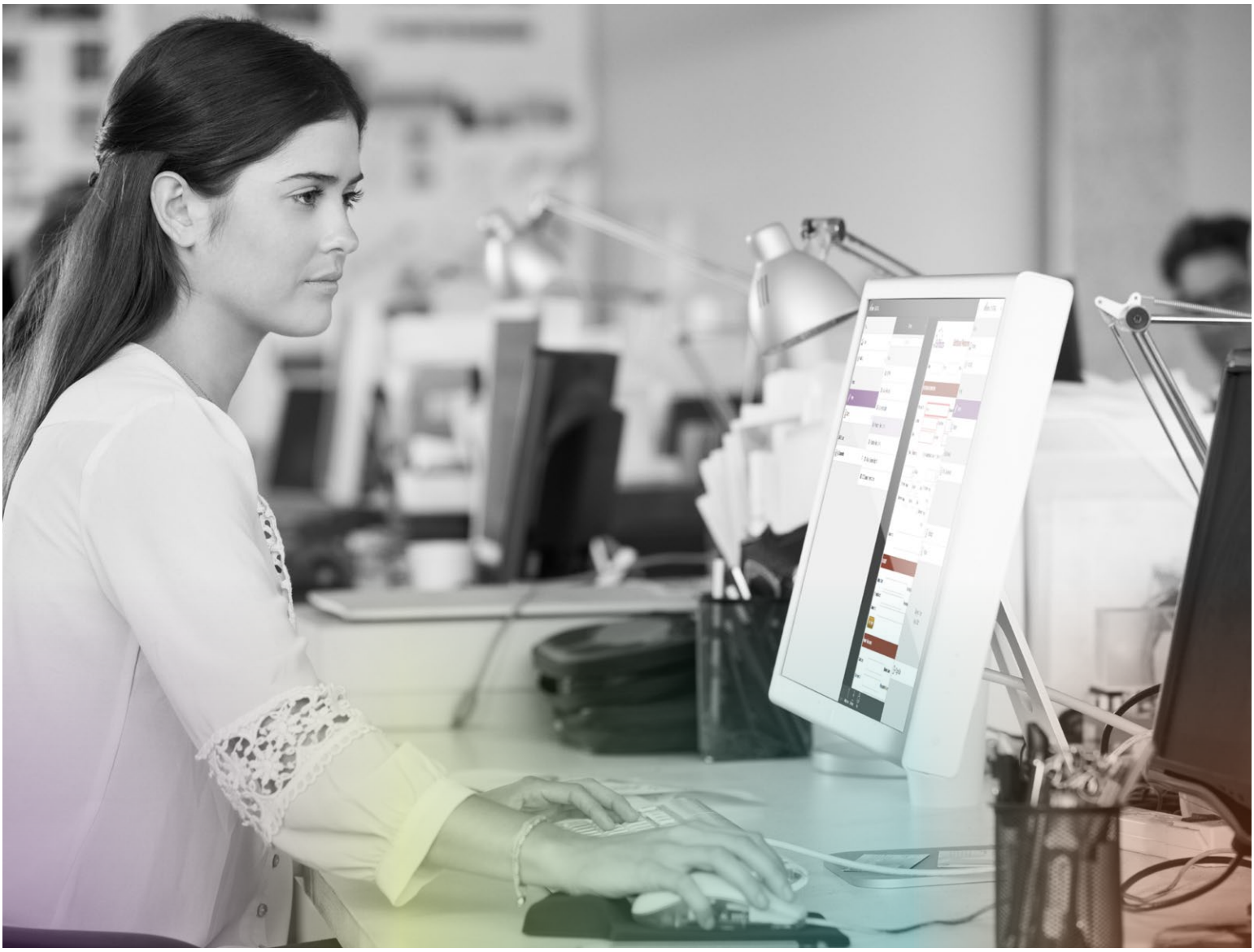
Softdocs

etrieve™
by Softdocs

Central User Guide

VERSION 2021.3



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Etrieve Central Overview

1.1 What is Etrieve Central?

Etrieve Central is a browser-based, mobile first management system for electronic forms and documents. Etrieve Central is designed to be:

- Universally accessible
- Easy to use
- Extensible & customizable
- Mobile friendly and responsive
- Dynamic & fully integrated

Additionally, Etrieve Central is designed to leverage familiar User Interface navigation used in Etrieve Content, minimizing the time for users to become proficient with the application.

1.2 Logging into Etrieve Central

Before logging into Etrieve Central, a user should first open a web browser and navigate to the Etrieve Central website address. The following browsers are supported:

- Microsoft Edge Chromium
- Google Chrome
- Mozilla Firefox
- Safari (Mac/iOS)

Next, the initial "splash page" will be presented, allowing the user to sign in using an Etrieve Username and Password or to select an identity provider from the options provided.

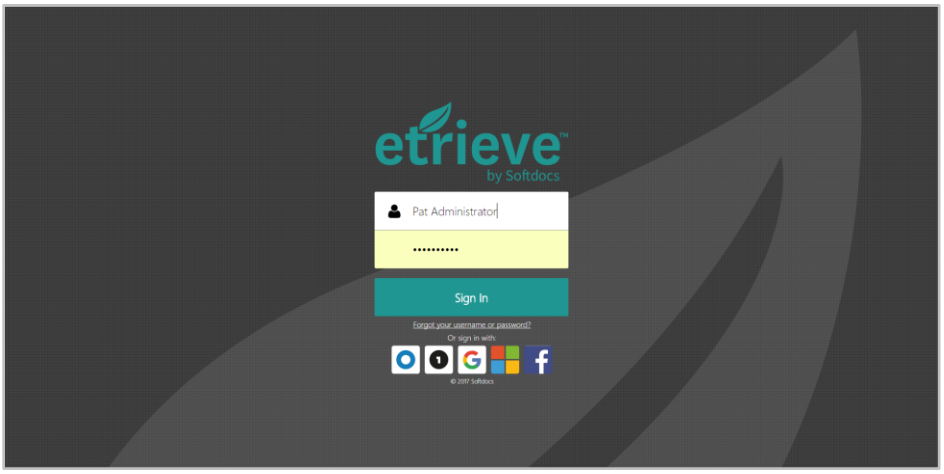


FIGURE 1.1 Etrieve Sign In "Splash" Page

TIP *Add the Etrieve Central website to the list of trusted websites in the domain.*

The list of possible identity providers will depend on the institution's particular needs and configurations. An institution may elect to use a single sign-on or third-party provider. The Sign In page may also be branded with the institution's logo.

Depending on the institution's needs, users will either Sign In using an Etrieve account or will be authenticated using an external identity provider, such as ADFS, Google, Facebook, Microsoft, Okta, or OneLogin.

If an identity provider is selected, its Sign In page will be presented if the user has not yet been authenticated. Also, your institution may have elected to implement an initial message (such as a FERPA warning) which must be agreed to after logging in.

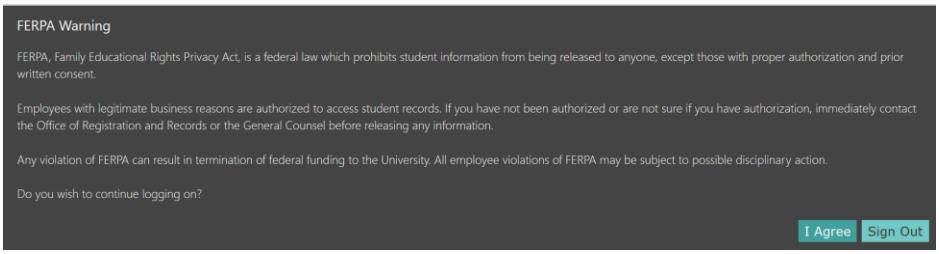


FIGURE 1.2 FERPA Warning Acknowledgement

After the user enters the correct login information and selects the "Sign In" button, the user will be directed to Etrieve Central.

FIGURE 1.3 Etrieve Sign In Page

Etrieve Central's page layout is divided into four sections:

- Header (top bar)
- Primary Navigation Panel (always displayed, left side of page)
- Alternate Navigation Panel (display toggled on/off, right side of page)
- Document Viewer (middle & right side of page when Alternate Navigation Panel is toggled off)

What appears in these four sections will vary depending on the user's security settings. For instance, the Settings selection in the Alternate Navigation Panel on the right will only display if the user is granted the privilege to manage Workflows or Forms.

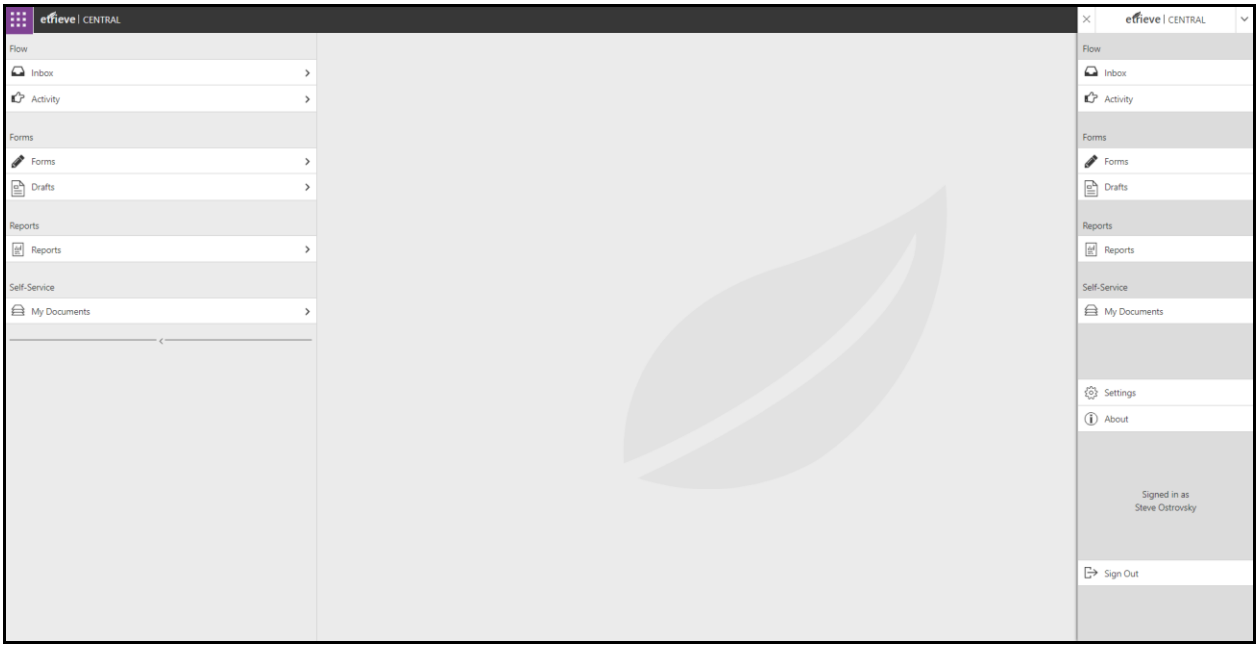


FIGURE 1.4 Etrieve Central Page Layout

1.3 Accessibility Improvements

In Etrieve Central, Forms and Flow accessibility enhancements have been enabled so that users can easily access various parts of Central via reader tools. Landmarks have been added to the right navigation panel and main viewing areas to improve the navigational experience via assistive technology and keyboard-only interaction. Users can now effectively search for and submit a form using assistive technology and keyboard -only navigation. Additional improvements include navigating to the Forms and Drafts options, navigating around the form, downloading, printing, commenting, attaching, and selecting submission options on the form's action bar.

When you open the hamburger menu at the top right of the page there will be links that can be accessed by tabbing through, or via the screen reader leading you to forms, content, and security.

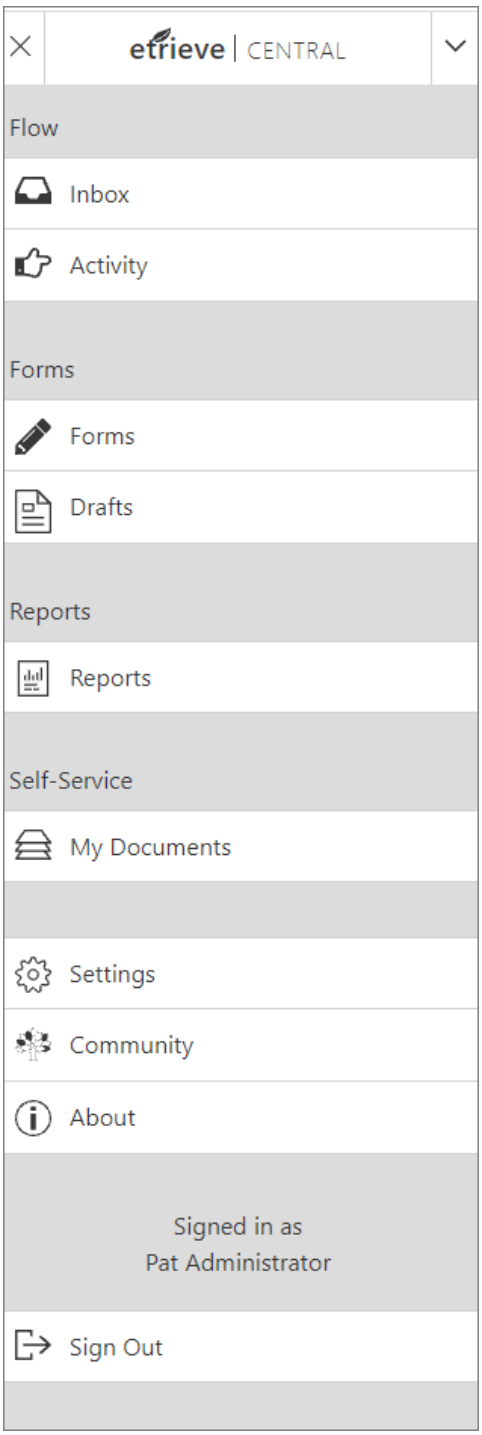


FIGURE 1.5 Navigation Panel that is accessible via tabbing

2

Central Page Layout and Navigation

2.1 Central Page Layout

To perform any function within Etrieve, users should navigate to the appropriate section of the Primary Navigation Panel. The Primary Navigation Panel is located on the left portion of the home page and consists of two sections, Flow, and Forms, with sub-panels that contain available Flow and Forms options. An institution may choose to purchase and install Etrieve Reports and Etrieve Self Service, which will also appear in the Primary Navigation Panel.

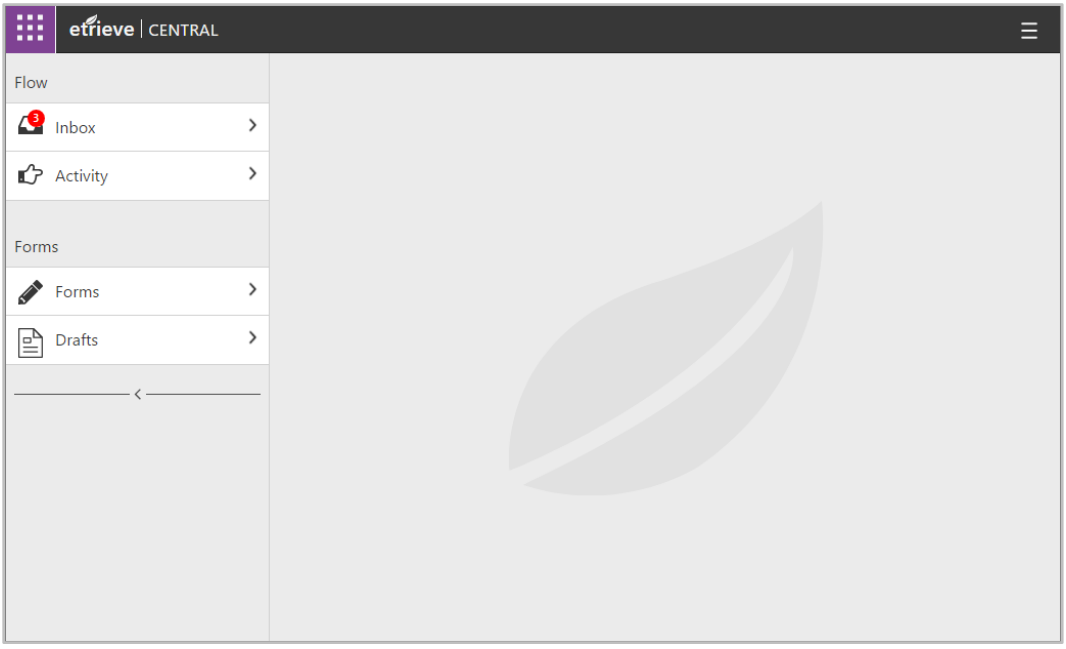


FIGURE 2.1 Etrieve Central Home Page

The Document Viewer displays when the user is working with items in one of the sub-panels and will show for Inbox, Activity, Forms, Drafts, Reports and Self Service.

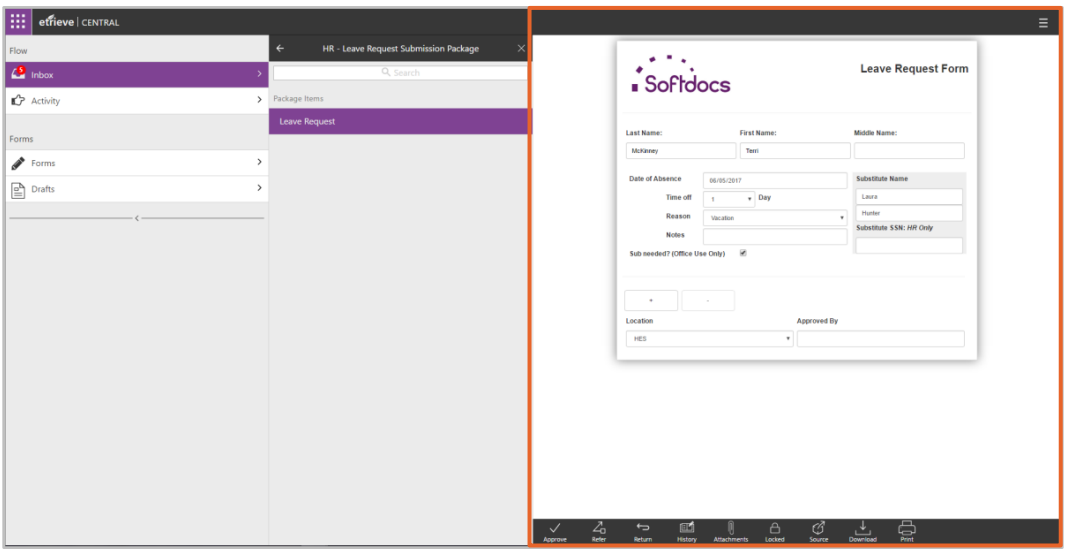


FIGURE 2.2 Etrieve Central Document Viewer

Figure 2.3 shows the appearance of the Etrieve Central home page when the Alternate Navigation Panel has been toggled on.

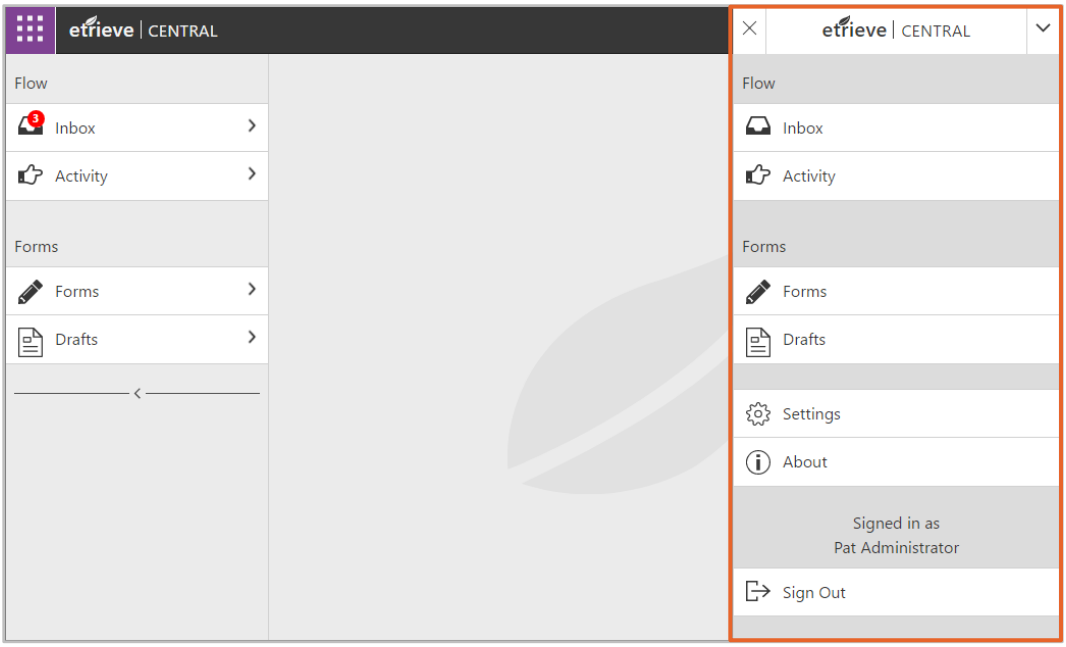


FIGURE 2.3 Etrieve Central Alternate Navigation Panel

The Primary Navigation Panel may be collapsed to increase the screen space available for the Document Viewer by clicking the arrowhead (<) at the center of the line at the bottom of this Panel. Clicking it again will restore the original Panel size.

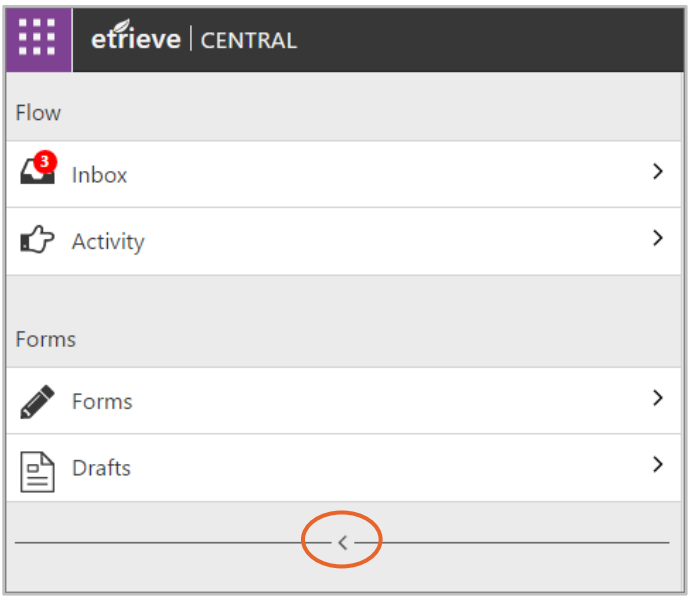


FIGURE 2.4 Collapse Primary Navigation Panel

2.2 The Header and Navigation

The Header is the top most bar on the Central Page. It contains three sections from left to right:

- App Switcher
- Etrieve | Central (View Reset)
- Alternate Panel Toggle (Three stacked bars)

FIGURE 2.5 The Header

APP SWITCHER | Clicking this icon (nine white squares) opens a three-button menu, allowing the user to navigate between Central, Content, and Security, the three main Etrieve applications.

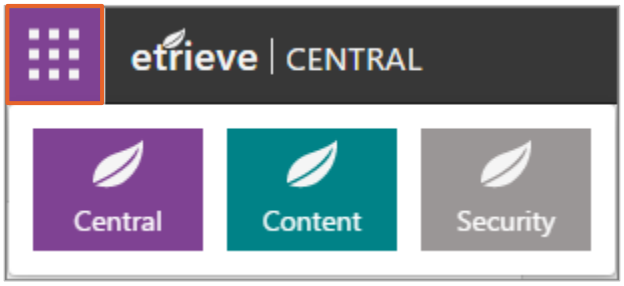


FIGURE 2.6 App Switcher

ETRIEVE | CENTRAL | Clicking here resets the user's view, closing any Inbox packages currently being viewed. It will return the user to the initial Etrieve Central home page.

FIGURE 2.7 Etrieve | Central

MENU ACCESS | Clicking the three stacked bars menu icon on the right toggles on the Alternate Navigation Panel, the elements of which are described below.

Within the Alternate Navigation Panel, the settings menu provides Central Flow and Forms settings that are configured to meet your institution's business processes, Forms and Workflows.

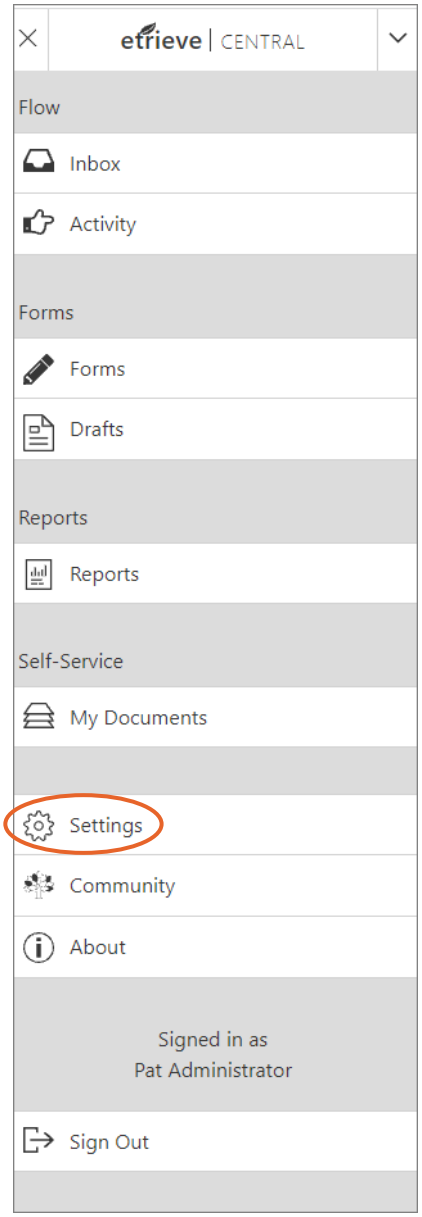


FIGURE 2.8 Etrieve | Central Alternate Navigation Panel

The Alternate Navigation Panel may be toggled off by clicking the X in the upper left of the Panel. Also on this Panel, the user may switch to other Etrieve Applications by clicking the down arrowhead (v) in the upper right of the Panel and selecting the desired application. This is the equivalent function of selecting the App Switcher on the Header Bar.

FLOW AND FORMS ACCESS | After the Alternate Navigation Panel is toggled on, if the user clicks on Inbox, Activity, Forms, Drafts or Self Service, this Panel will be immediately toggled off, and the equivalent selection on the Primary Navigation Panel will be activated.

SETTINGS COG | The Settings Cog will be visible to users who have access to manage and configure Etrieve Workflows and Forms. Clicking the Cog will open the Central Settings main menu.

COMMUNITY | Community provides a link to access Softdocs' Community Login page.

ABOUT | About provides details on the version of Etrieve Central that the user is accessing, as well as copyright and licensing information.

USERNAME | The username of the currently logged-in user is displayed here.

SIGN OUT | Signs out the currently logged in user. After the application has been idle for the configured amount of time, the user will be redirected to the 'You are logged out' page. Select the 'Log Back In' button or click the back arrow on your browser to return to the Sign In Page.

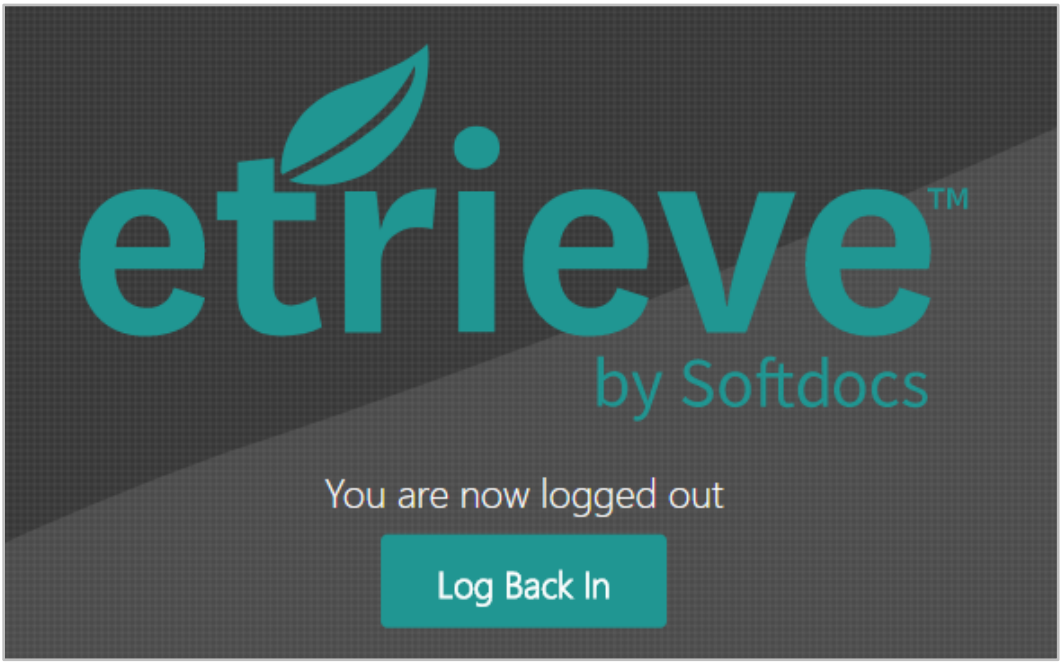


FIGURE 2.9 Log Back In Button

2.3 The Document Viewer

The Document Viewer fills the available space on the right side of the Etrieve Central homepage. Users may take a variety of actions on the contents of Packages that have been routed to the Inbox by Workflows. Additionally, users may fill and submit Forms for which they have been granted access.

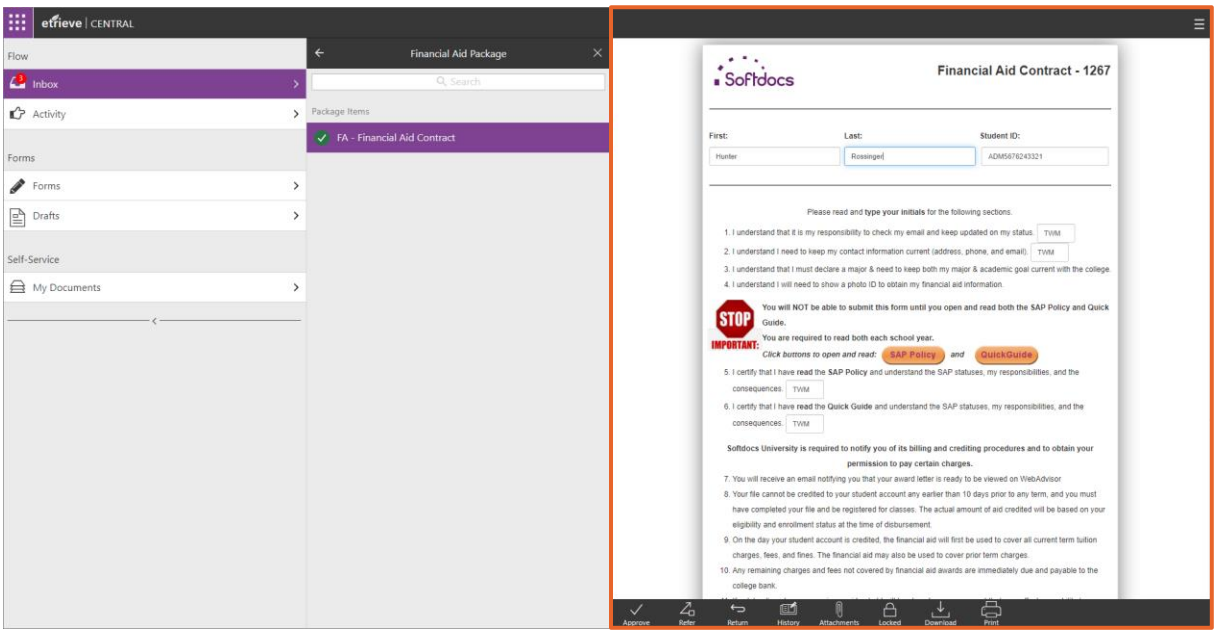
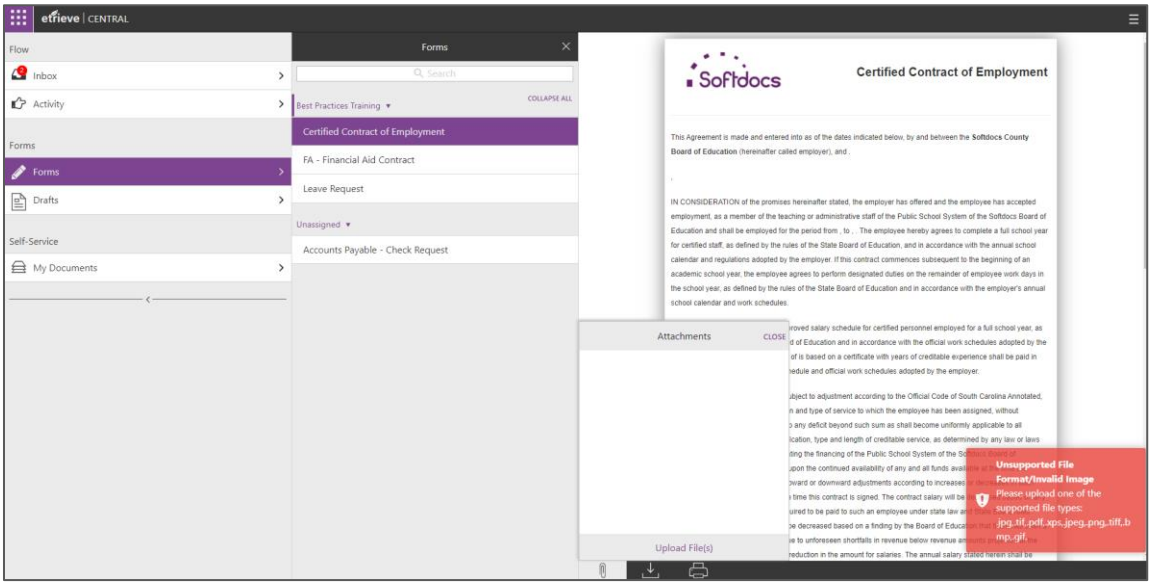


FIGURE 2.10 Etrieve Central Inbox – View Package Items and Associated Document

ATTACHMENTS | From the Document Viewer, users can upload attachments to a form while filling it out. There are limited supported file types for attachments. The file types supported are: .jpg, .tif, .pdf, .xps, .jpeg, .png, .tiff, .bmp, and .gif. If a user attempts to upload a file with a type that is not included in this list, an error message will appear to let the user know the limitation.



ANNOTATIONS | From the Document Viewer, users can view any annotations that may be present on a document in Etrieve Content. Annotations viewed through the Document Viewer in Etrieve Central are not live and cannot be edited.

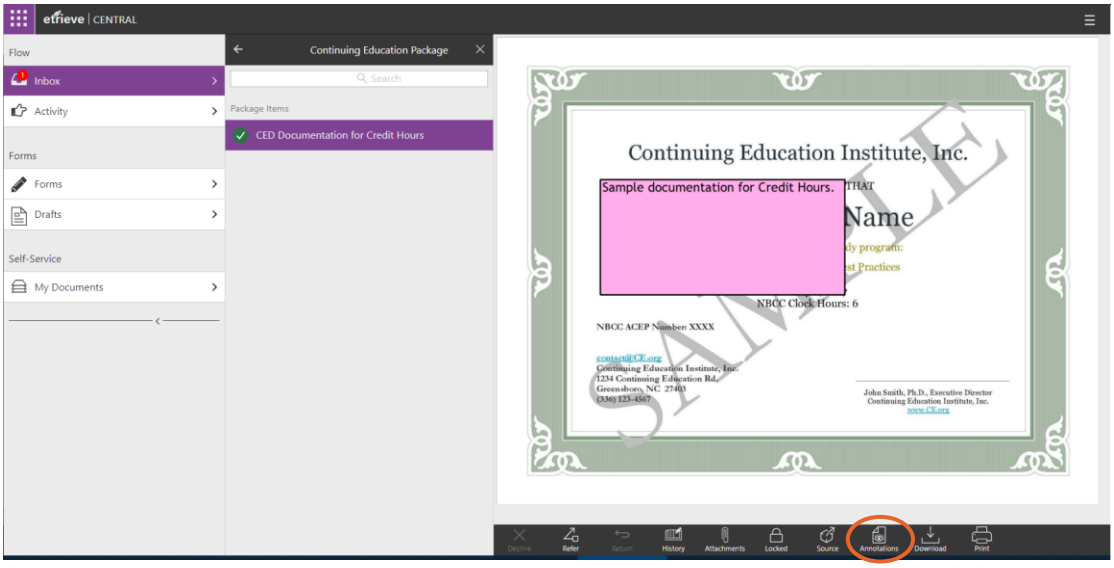


FIGURE 2.11 Etrieve Central Inbox - View Package Items and Associated Completed Form with Annotation

2.4 Focus Mode

Some institutions may benefit from the "Focus Mode" feature when sending links for some employee to fill out a form without extra distractions. Users can send links to forms that open in "Focus Mode" by utilizing URL parameters. The user then clicking on the link with focus mode URL parameters will find that the document viewer has been pared down to include only what is required for filling out forms. This feature aids users in the ability to provide links via external methods—such as email—to others in their institution.

The URL parameters that apply to focus mode are:

- https://[central_URL]/#/form/[FormID]/?header=false&focus=true
  - Displays only the Form Viewer and Action Bar, hiding the Etrieve Central header
- https://[central_URL]/#/form/[FormID]/?focus=true
  - Displays only the Form Viewer and Action Bar, but does not hide the Etrieve Central header
- https://[central_URL]/#/form/[FormID]/?header=false
  - Only hides the Central Header

The following figures show examples of each of the types of URL parameters and their associated views:

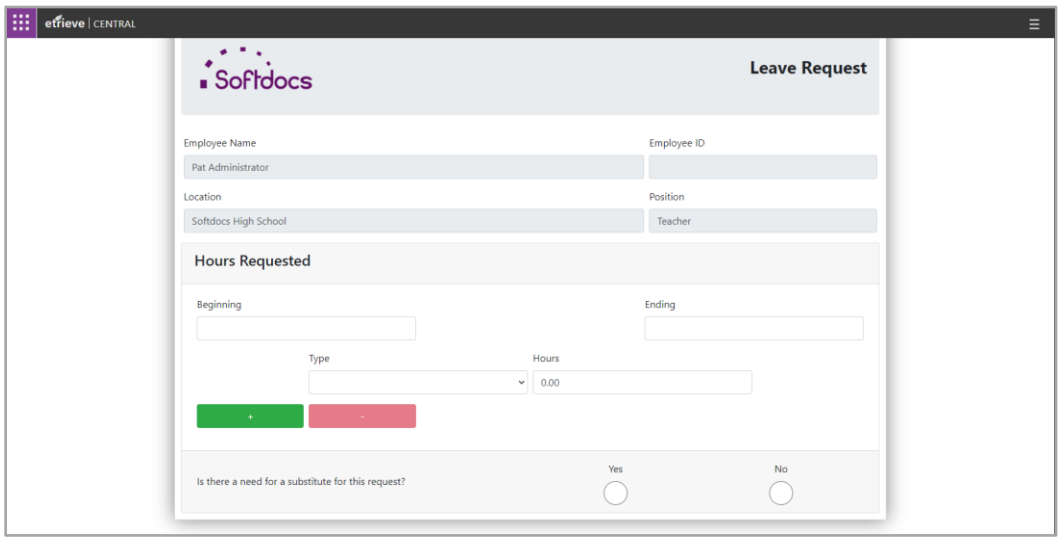


FIGURE 2.12 Etrieve Central Forms Viewer without Header and in Focus Mode

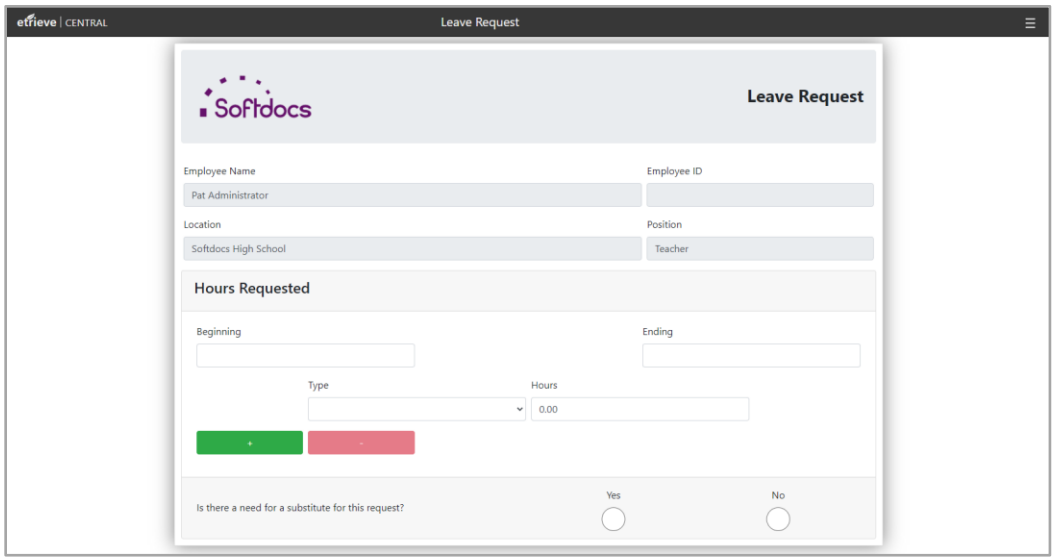


FIGURE 2.13 Etrieve Central Forms Viewer in Focus Mode (with header)

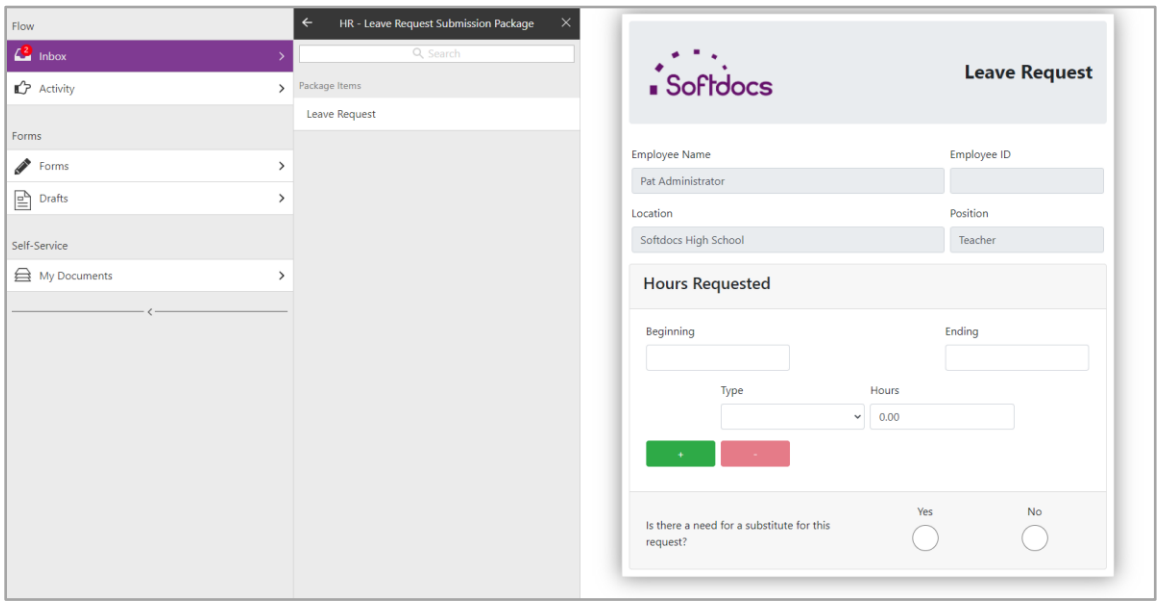


FIGURE 2.14 Etrieve Central Forms Viewer without header (no Focus Mode)

2.5 Anonymous Access

A form that has “Anonymous Access” enabled will be available to users without an Etrieve login. This feature provides forms to be more widely accessible without needing to create Etrieve logins for example student forms. Users who are logged into Etrieve will view forms with Anonymous Access in the standard form viewer. However, users without Etrieve logins will view Anonymous Access forms in a simplified viewer, as shown in Figure 2.15.

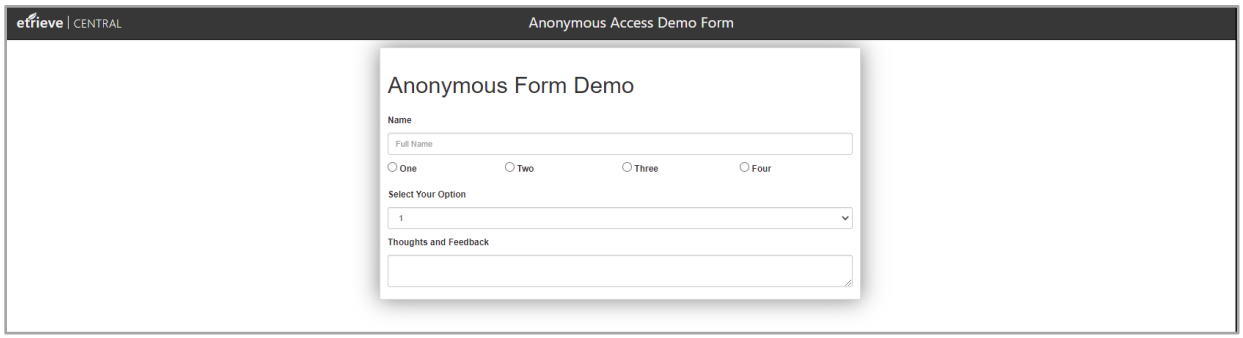


FIGURE 2.15 Etrieve Central Anonymous Access Form View for Users without Etrieve Login

3

Central Flow Management

3.1 Flow Inbox Panel

The Inbox panel maintains all document packages which have been routed to the user via workflows. The most recent package will appear first (similar to e-mail). Packages arrive in the Inbox once they are approved by the previous actor in the workflow. The backend workflows are designed and implemented by Etrieve Content Administrators and are transparent to the end user.

Document Packages contain one or more items, typically document image(s) and/or electronic forms (e Forms). The Inbox can be searched for the name of a document package or for the name of any item it contains. Users may search for Package names, Item names, or both (All). The list of Packages will be filtered to show only those specified in the search bar.

If a user performs a search and navigates to a Package or Item, the system will keep the criteria for the search after they navigate away from the Inbox or Activity. If the user returns to Inbox or Activity, their search filter will still be in place.

'All' represents an inclusive list of every Inbox Package.

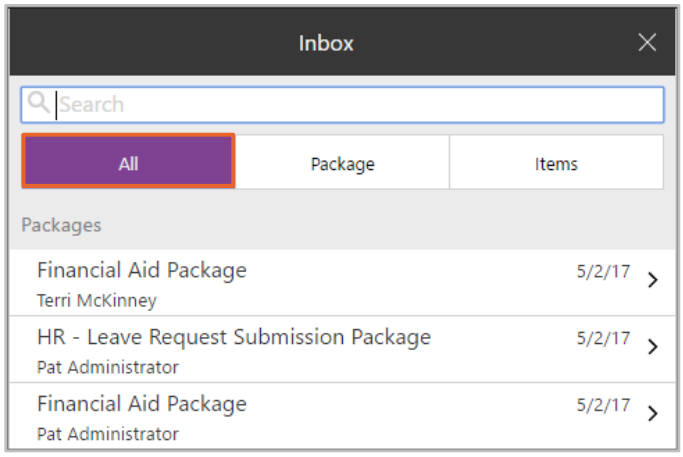


FIGURE 3.1 Flow Inbox Search All

‘Package’ represents a bundle of similar Items that are grouped together for a common purpose.

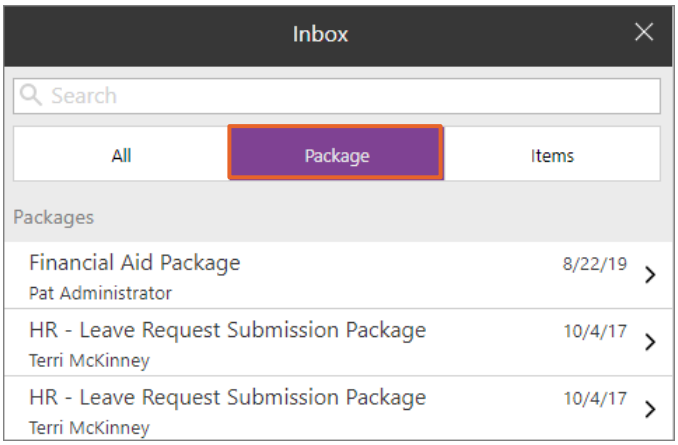


FIGURE 3.2 Flow Inbox Search Package

‘Items’ represent individual files that make up a package. There may be more than one item in a package.

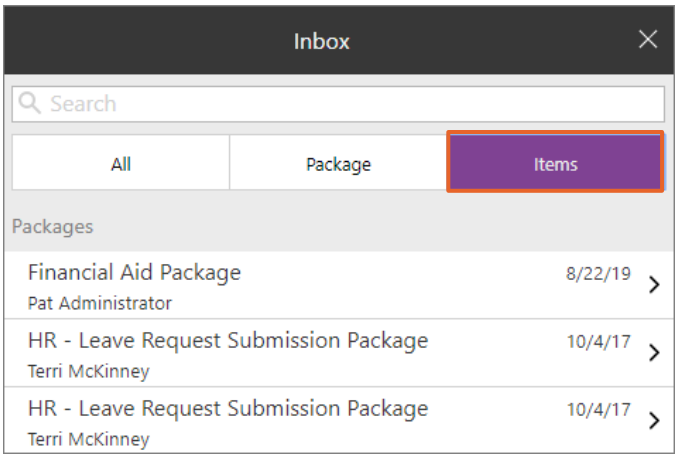


FIGURE 3.3 Flow Inbox Search Items

From the Document Viewer panel, a user can perform the following actions within Flow:

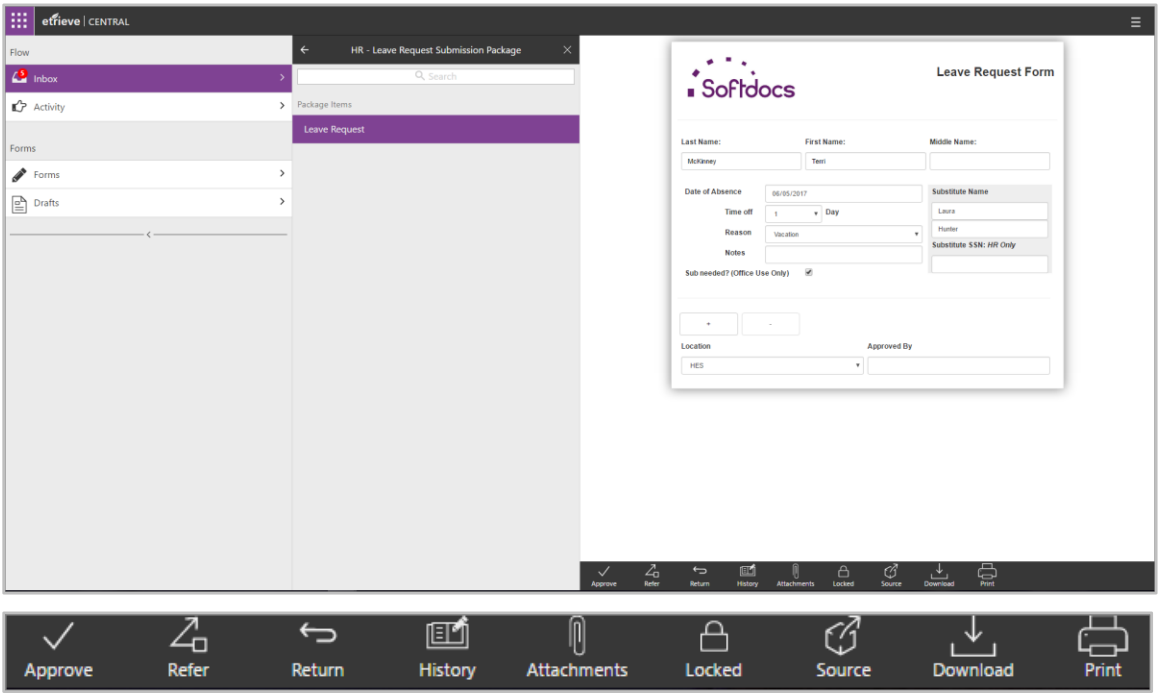


FIGURE 3.4 Flow Inbox Illustration of Action Buttons

APPROVE | Approves the document, allowing it to continue with its approved workflow. If the User Directed Routing feature has been incorporated into a given workflow, when the Approve icon is selected, the name of the User Group(s) at the next step in the workflow is displayed as illustrated in Figure 3.5. If the workflow is designed to send the Package to more than one Group as the next step in the workflow, all of these Groups (and their constituent Users) will be selectable. The approver may choose to send the Package to the entire Group by clicking the checkbox to the left of the Group name or may select one or more Group members by clicking the arrowhead (>) to the right of the Group name. Only available users will be included in the candidate list to avoid sending Packages to users no longer at the Institution. Approve may only be selected once to avoid erroneous approvals. The list of available approvers is configured by the Administrator in Security.

NOTE | Depending on your institution's workflow, the approve icon may or may not be displayed.

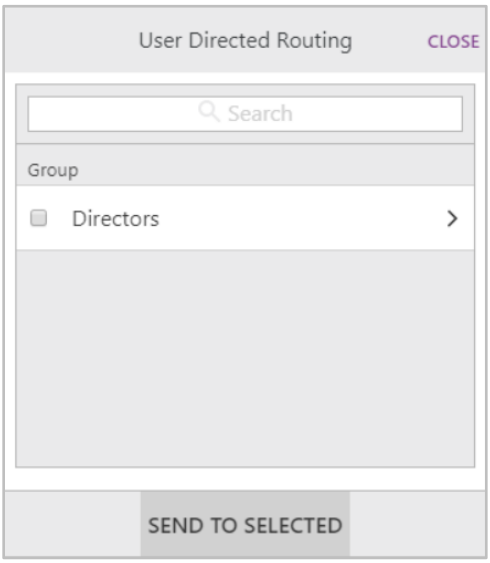


FIGURE 3.5 Select Group to Receive Form / Package

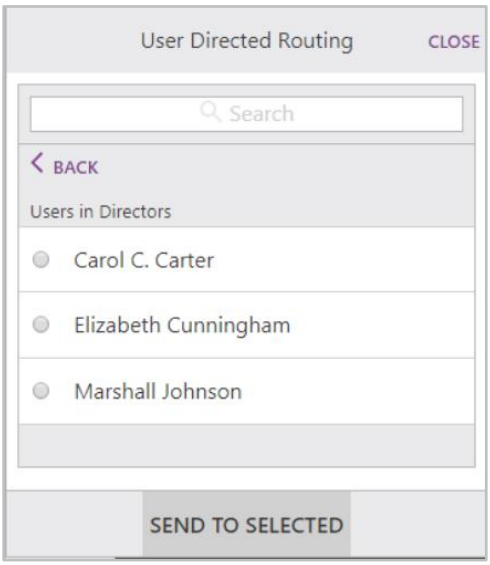


FIGURE 3.6 Select Individual Users to Receive Form / Package

DECLINE | Declines the document and sends it through an alternate declined workflow.

NOTE | Depending on your institution's workflow, the decline icon may or may not be configured in the flow.

REFER | Allows the document to be submitted to an alternative user for review. This action can be enabled or disabled at a specific Actor Step in a workflow by an administrator. The user may or may not be an element in the workflow. The user will need the appropriate security access to 'Etrieve Forms.' The user to whom the Package has been referred has all the normal options except for Deny, including the ability to refer the Package to a third Etrieve user, thus creating a 'chain' of referrals. The Username and the Display Name of the alternative user will be shown to avoid confusion of users with the same name. As a name is entered into the Search field, results will be filtered and narrowed down. The application will only display the first 50 results from the page.

ENFORCE PACKAGE REVIEW NOTE | Required fields do not have to be satisfied to perform this action, unless the workflow step has been set to enforce package review. Administrators have the option to enforce package review by required fields on any decision actor. In this case, required fields must be completed by the reviewer before the package can be acted upon.

NOTE | A referral user cannot return a referred document back to the user who initially referred the document. For example, if User A refers a document to User B, then User B will not be able to return that document back to User A.

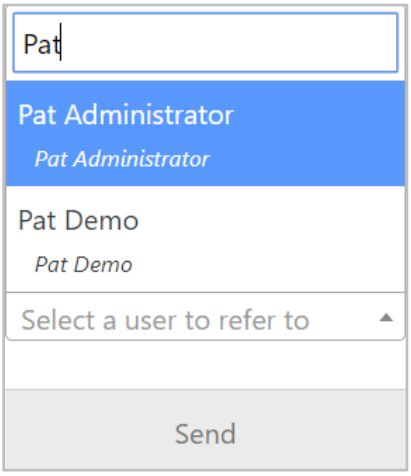


FIGURE 3.7 Refer Search Field

RETURN | Allows the document to be submitted to any previous user within the workflow for review. The workflow administrator has the option to prevent a package recipient from returning a package to a referral user who approved the package during previous steps. The referral users will be omitted from the list of available users when performing a 'Return to Previous Step' action.

If a package has electronic signatures collected from external users on previous steps in a workflow and the reviewer tries to return it to a step prior to an E-Sign step, they will be presented with the following data loss warning:

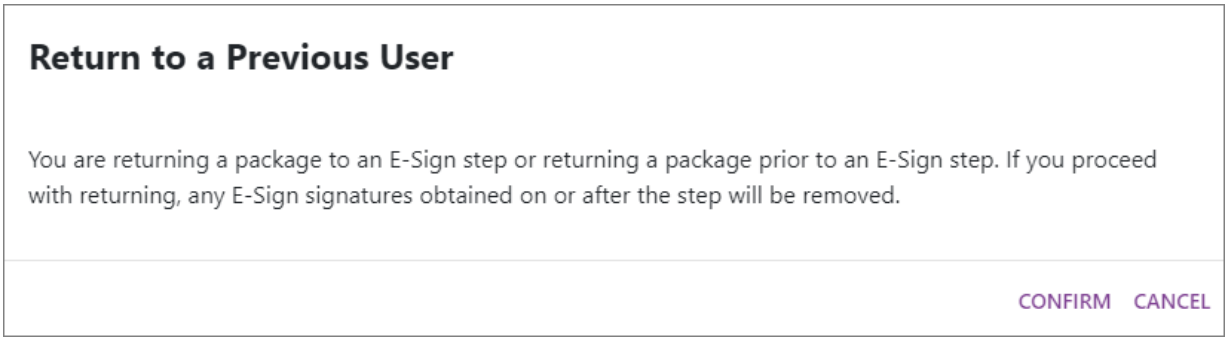


FIGURE 3.8 E-Sign Return to Previous Step Warning

Clicking 'Confirm' returns the package to the previous step with all the data on the signature fields removed.

NOTE | Required fields do not have to be satisfied to perform this action.

HISTORY | History allows the user to view information about the Package's routing in the workflow up to the present time. If the Package Item is an eForm, information about any changes that have been made to the form will also be recorded.

PACKAGE HISTORY | View a detailed history of the Package's progress. Additionally, a user has the ability to add general comments regarding package actions. Whenever a member of a group or role acts on a package (either to approve the package or to deny the package) on behalf of that group or role, the package will be listed in the activity of all members of the group. If the group or role participates in filtered routing, then the Activity will be filtered through the same configuration. Click 'Save' to preserve any comments made.

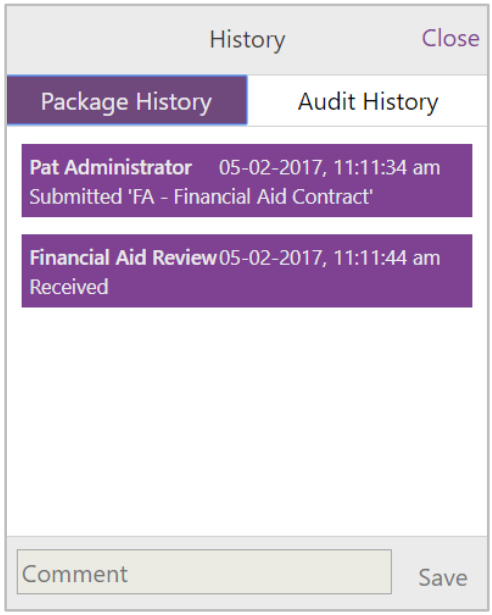


FIGURE 3.9 History | Package History

AUDIT HISTORY | View any changes or updates that have been made to the Form. Select the View Changes button to the right of the Form Name and the Form will appear in the Viewer in a read-only format. Purple informational

tags are displayed in each field of the Form regardless of whether or not changes were made. If a field on the Form was changed, the actual change made, date, time and user ID is presented when the informational tag for that field is selected.

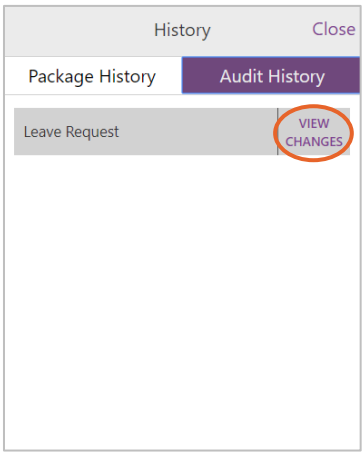


FIGURE 3.10 a Audit History

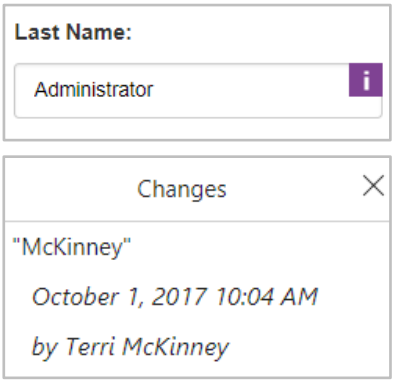


FIGURE 3.10 b Audit History | Changes Made

ATTACHMENTS | Users may upload file(s) to the Item that is currently being displayed in the Viewer. Click on the icon and a panel will be displayed where the user can select files and upload them. After attachments have been uploaded, when the icon is selected, there will be a red badge on the icon displaying the count of attached documents. There will also be a small image with three stacked squares in the Upload Dialog Box. The user can select this icon to Edit, Delete or View the Attachment. When View is selected, the file will be downloaded in its native format.

FIGURE 3.11 Attachments Icon

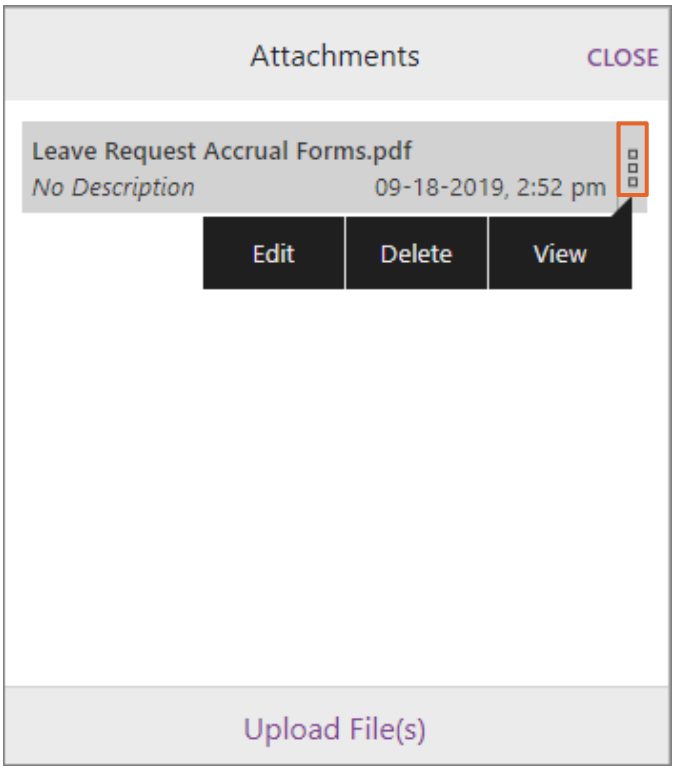


FIGURE 3.12 Attachments

LOCKED/UNLOCKED | Represents the current Lock status of the document. A locked document can only be edited, approved, referred, etc., by the user who locked it.

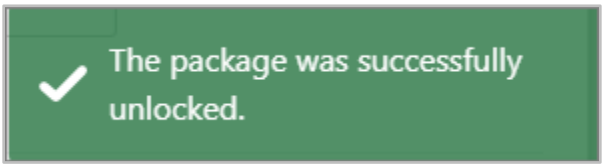


FIGURE 3.13 Locked Advisory

An unlocked document can be changed and manipulated by other users within the workflow.

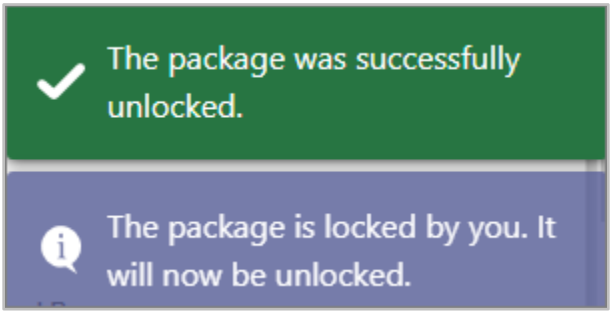


FIGURE 3.14 Unlocked Advisory

SOURCE | If the document was initiated from Etrieve Content and routed through an Automation to arrive in Central, this button will switch the user back to Etrieve Content and open the document there. There is no direct return to the Package after viewing it in Content. If this process is not applicable, an orange pop-up will appear alerting the user that the configured Package Item must be selected.

DOWNLOAD | Downloads a PDF version of the Package. An Item with multiple pages includes all pages within the PDF. An additional page with the Package history information will be appended to the end of the Package PDF file.

PRINT | Prints the current document.

3.2 E-Sign View for External Users

Institutions use the E-Sign feature to collect electronic signatures on forms from users such as Parents, Applicants or Vendors who are external to the institution and do not have an Etrieve login. When a form is routed to an E-Sign step via an active workflow, a custom email is sent to the email address identified at that step with a link that corresponds to the appropriate package needing signature.

When external users click the E-Sign link in the email, the external user is presented the form in the focus mode.

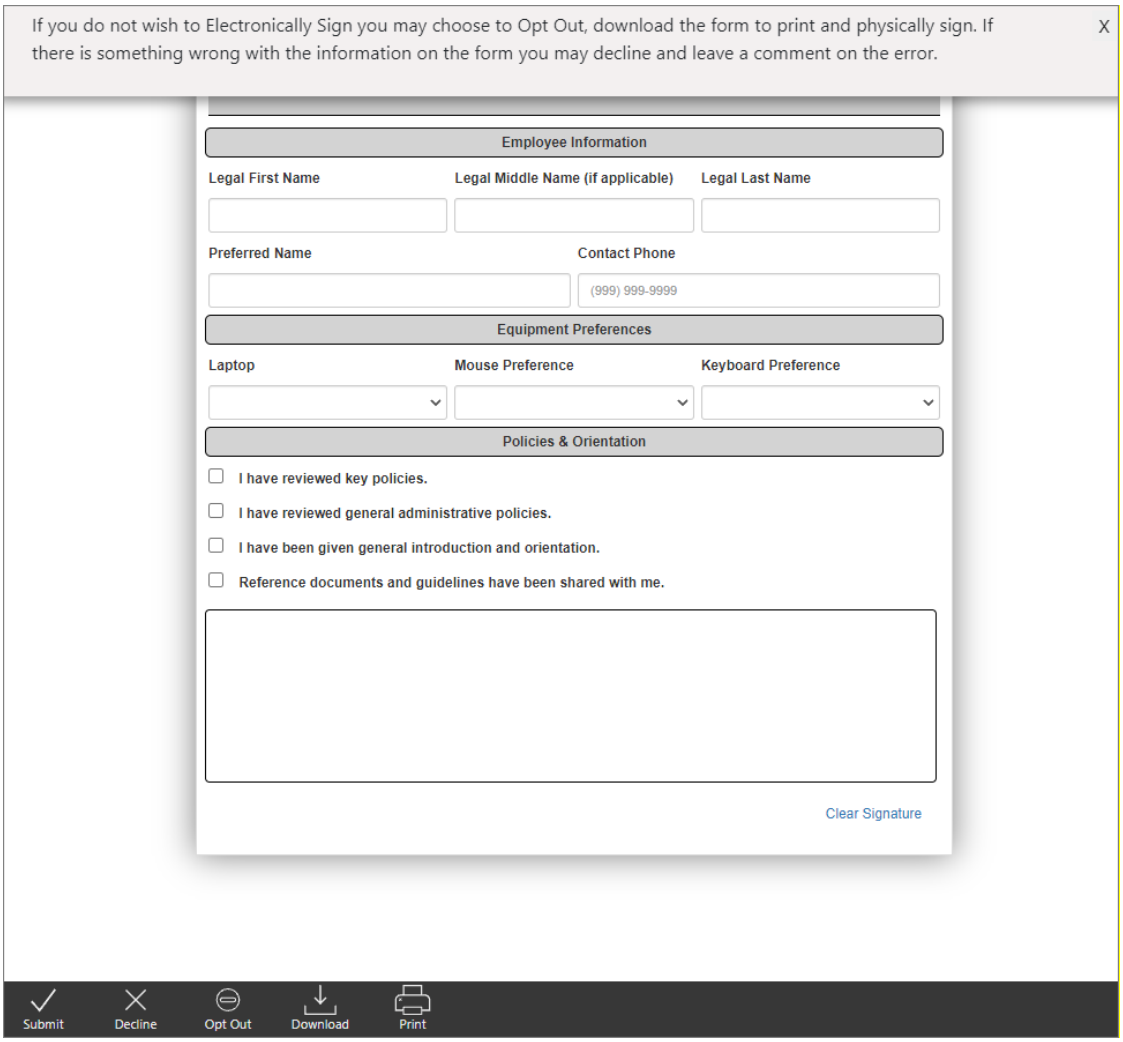


FIGURE 3.15 Etrieve Central E-Sign View for Users without Etrieve Login

The E-Sign view includes a banner which overlays the top portion of the view, explicitly informing the user of the options that they have if they do not want to E-Sign the form. The user has the option to opt out of electronically signing the form and submit a physically signed copy instead. The decline action requires a reason for the decline as well. By selecting the 'x' at the top of the banner, the banner will close, and the user can continue to fill out the form and select options in the Action Panel.

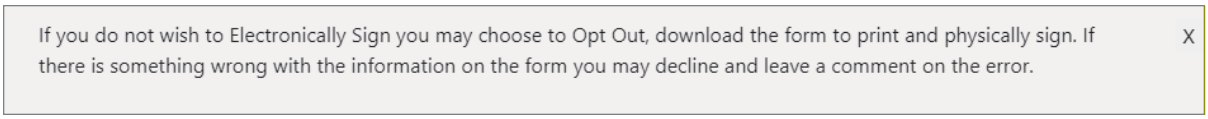


FIGURE 3.16 Etrieve Central E-Sign View Banner informing users that they can Opt Out

From the E-Sign View panel, a user can perform the following actions within Flow:

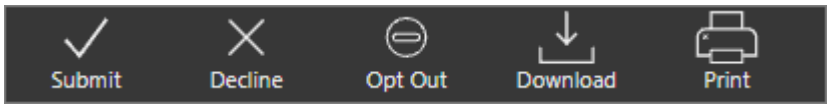


FIGURE 3.17 Etrieve Central E-Sign View Action Panel

SUBMIT | Allows user to submit the E-Sign form package after they've filled out all the required signature fields on the form. Any field that is required but has not been completed when this button is clicked will be surrounded by a red border. A prompt will appear in the bottom right corner reminding the user to enter text in the required fields before submission.

Additionally, the user will be asked for consent to do business electronically after they click the Submit button. Choosing the 'Accept' option will submit the form with the user's electronic signature affixed. An email is sent to the user with a link to a read-only copy of the form which they can refer back to in the future. Choosing "Not Now" will take the user back to E-Sign view of the form where they can either edit the form fields and/or perform an action.

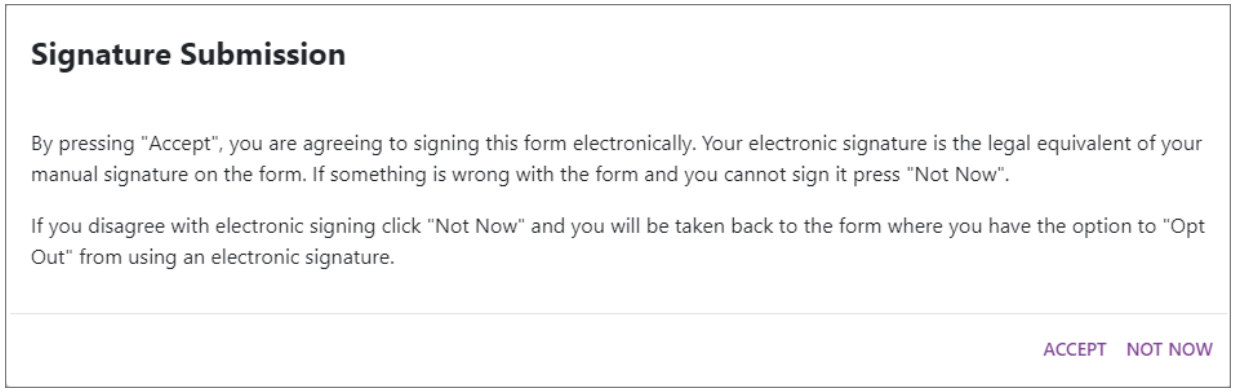


FIGURE 3.18 Confirmation of consent to do business electronically

DECLINE | Declines the document and sends it through an alternate declined workflow. However, when on an E-Sign step, the user is required to provide a reason for declining to sign the document.

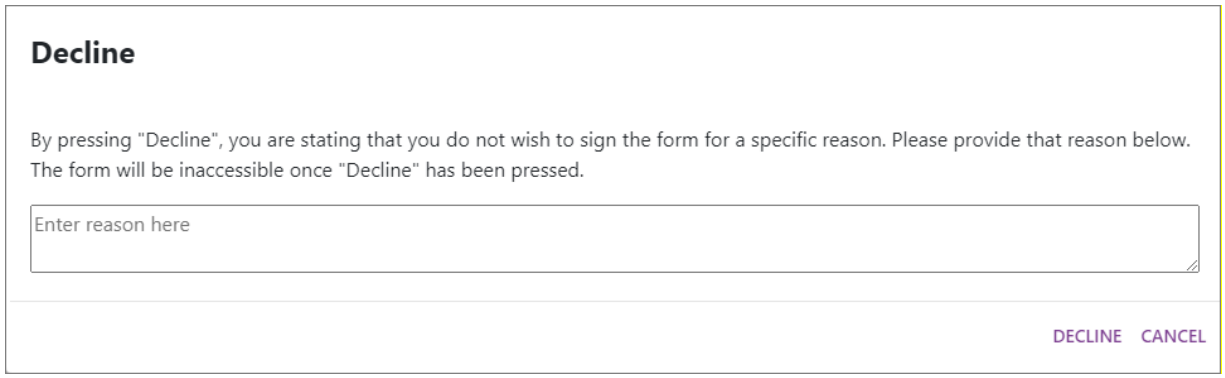


FIGURE 3.19 Reason for declining to electronically sign a document

NOTE | Depending on your institution's workflow, the decline icon may or may not be configured in the flow.

OPT OUT | Allows the user to opt out of electronically signing a document. When choosing this option, the user is asked to confirm their selection and will need to provide a copy with a physical signature if signature is required.

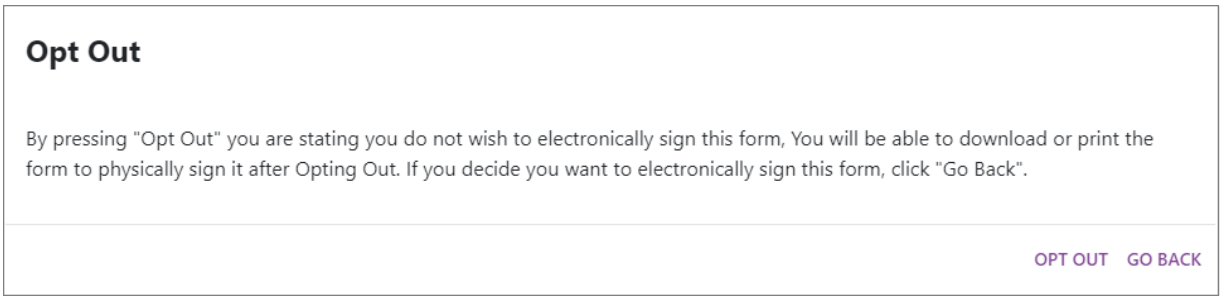


FIGURE 3.20 E-Sign Opt Out Confirmation

If a user opted out and changes their mind at a later time, they can refer back to the initial email and select the link again to provide an electronic signature.

DOWNLOAD | Downloads a PDF version of the Package. If the PDF has multiple pages, all pages will be included in the PDF package. An additional page with the Package history information will be appended to the end of the Package PDF file.

PRINT | Prints the current document. A user who opted out of the electronic signature can use this option to print & physically sign the copy and deliver it to the appropriate office at the institution.

3.3 Flow Activity Panel

The Activity Panel contains any workflow packages that the user had an active role in such as approving, initiating, etc. This Panel reviews the current status of these package as well as any activities that were related to the package. No action can be taken towards a package from this panel.

Similar to the Inbox Panel, user activity may be searched and filtered to limit results by all, specific packages, or by items. If a user applies a filter to the list of workflow packages in their Inbox or Activity, those filters will be preserved until the user logs out or closes the browser.

'All' represents an inclusive list of every Inbox Package.

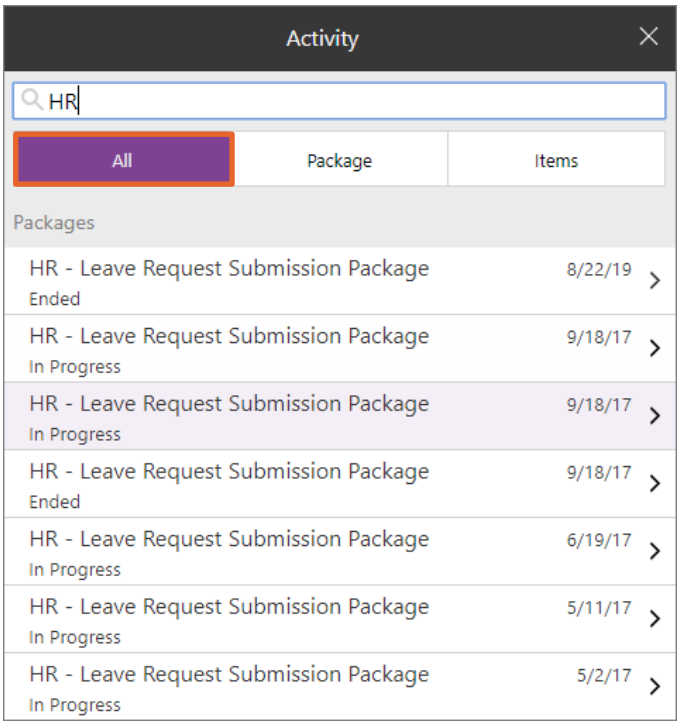


FIGURE 3.21 Flow Activity Search All Filtered by 'HR'

'Package' represents a bundle of similar Items that are grouped together for a common purpose.

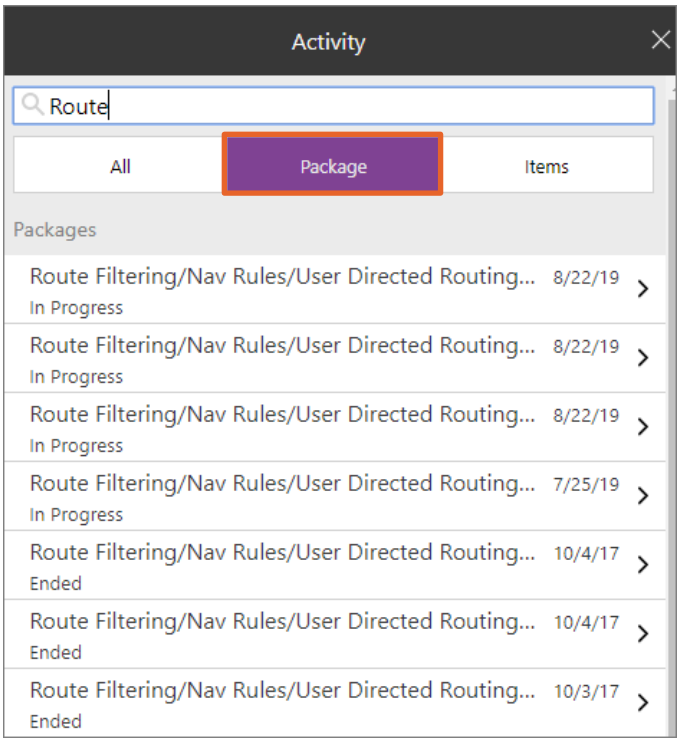


FIGURE 3.22 Flow Activity Search Package Filtered by 'Route'

‘Items’ represent individual files that make up a package. There may be more than one item in a package.

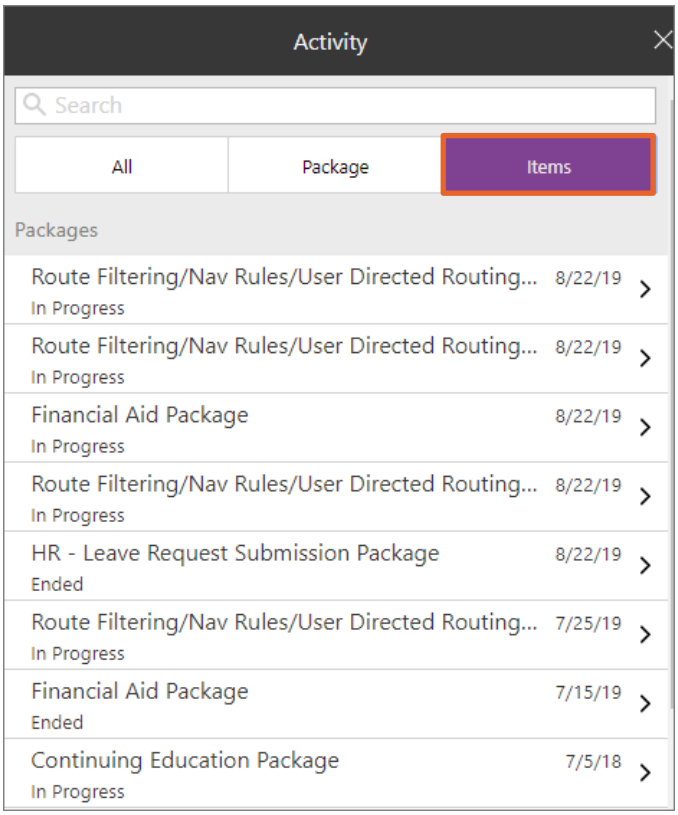


FIGURE 3.23 Flow Activity Search Items

In the Activity Panel, the status of a Package will also be described. A Package can either be in Progress or will have Ended in the workflow. In Progress refers to a workflow that is still requesting activities from Users and has not been completed thus far. Ended refers to a Package that has completed the workflow, and all activities have been satisfied.

From the Activity Panel a user can perform the following actions within the Flow Activity:

HISTORY | History allows the user to view information about the Package’s routing in the workflow up to the present time. If the Package Item is an eForm, information about any changes that have been made to the form will also be recorded.

NOTE | If a package is routed to a specific member of a group using User Directed Routing and is acted on by them, it will be listed only in that member’s activity. The activity of the other group members will not indicate that the package was acted upon.

PACKAGE HISTORY | View a detailed history of the Package’s progress. Additionally, a user has the ability to add general comments regarding package actions. Click ‘Save’ to preserve any comments made.

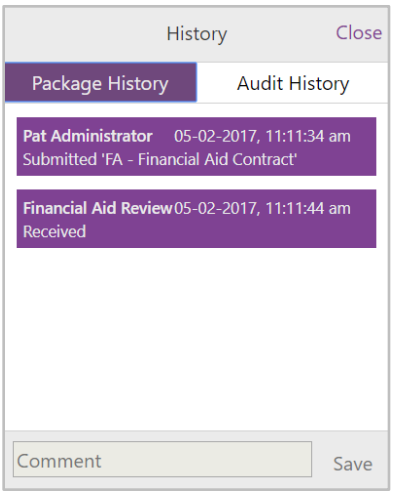


FIGURE 3.24 History | Package History

AUDIT HISTORY | View any changes or updates that have been made to the Form. Select the View Changes button to the right of the Form Name and the Form will appear in the Viewer in a read-only format. Purple information tags are displayed in each field of the Form regardless of whether or not changes were made. If a field on the Form was changed, the actual change made, date, time and user ID is presented when the informational tag for that field is selected.

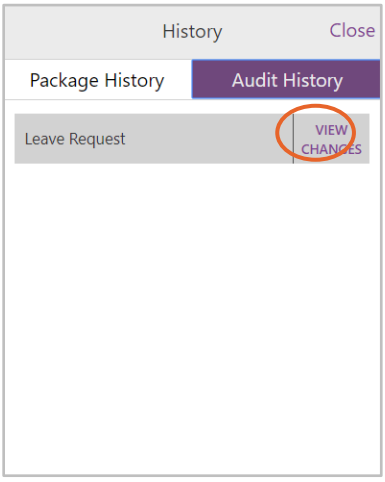


FIGURE 3.25 a Audit History Page

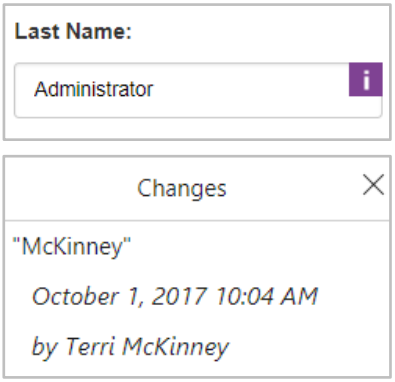


FIGURE 3.25 b Audit History | Changes Made Page

ATTACHMENTS | Users may upload file(s) to the Item that is currently being displayed in the Viewer. Click on the icon and a panel will be displayed where the user can select files and upload them. After attachments have been uploaded, when the icon is selected, there will be a red badge on the icon displaying the count of attached documents. There will also be a small image with three stacked squares. The user can select this icon to Edit, Delete or View the Attachment. When View is selected, the file will be downloaded in its native format.

FIGURE 3.26 Attachments Icon

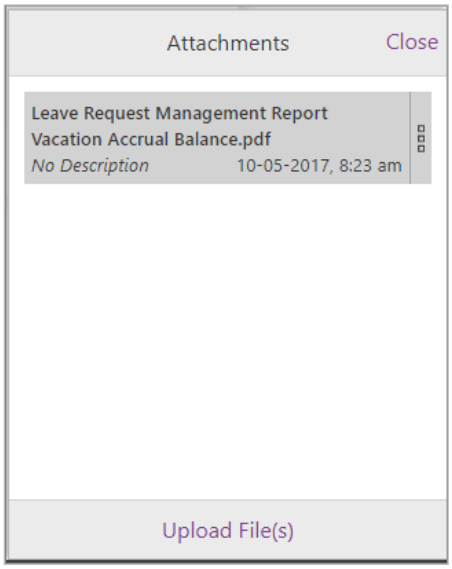


FIGURE 3.27 Attachments

SOURCE | If the document was initiated from Etrieve Content and routed through an Automation to arrive in Central, this button will switch the user back to Etrieve Content and open the document there. There is no direct return to the Package after viewing it in Content. If this process is not applicable, an orange pop-up will appear alerting the user that a configured Package Item must be selected.

DOWNLOAD | Downloads a PDF version of the Package. An Item with multiple pages includes all pages within the PDF. An additional page with the Package history information will be appended to the end of the Package PDF file.

PRINT | Print the current document.

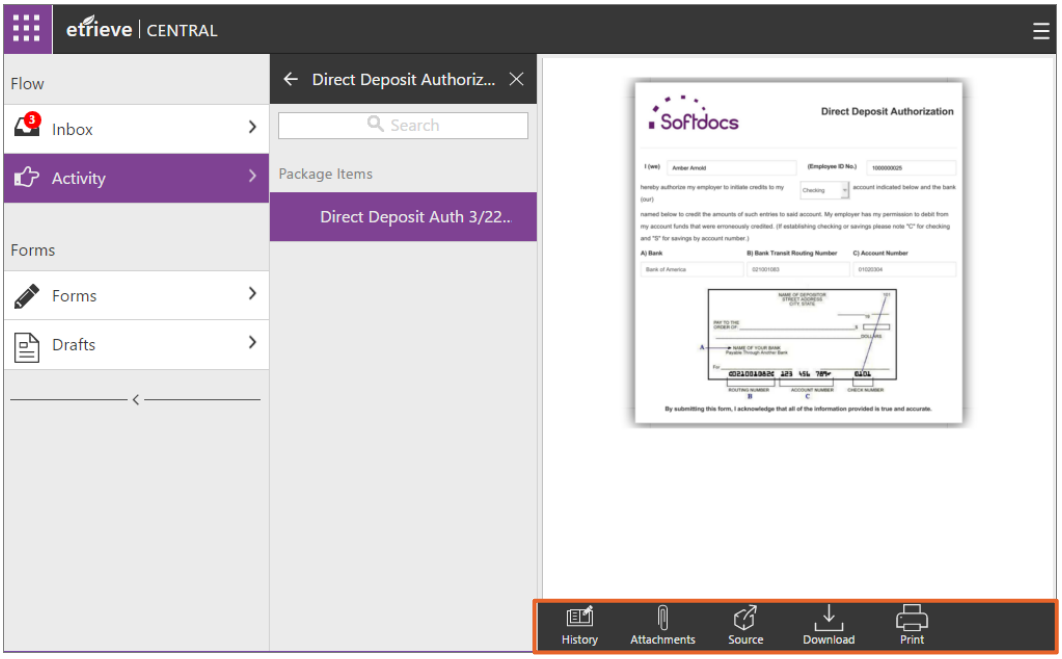


FIGURE 3.28 Flow Activity Actions

4

Central Forms Management

4.1 Forms Panel

The Forms Panel maintains a list of all forms that a user has permission to complete and submit.

A user can be a member of numerous Form Groups, and multiple forms can be assigned by an Administrator to each Forms Group. Select the arrow to the right of the Forms Group Name to open the drop-down list of available Forms. Select the arrow again to hide the available Forms for that group. There is an Expand All/Collapse All button in the top right corner that will perform the corresponding action.

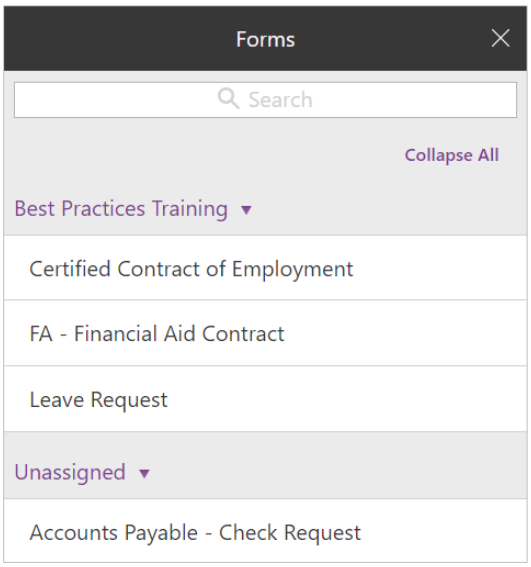


FIGURE 4.1 a Available Forms for Multiple Forms Groups

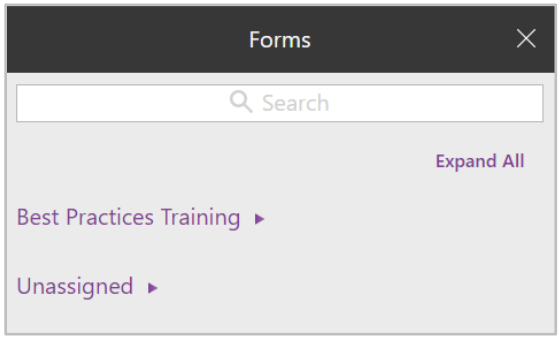


FIGURE 4.1 b Hidden Forms Groups

From the Forms Panel a user can perform the following actions:

SUBMIT | Submit a form into its assigned workflow. Any field that is required but has not been completed when this button is clicked will be surrounded by a red border. A prompt will appear in the bottom right corner reminding the user to enter text in the required fields before submission.

If User Directed Routing has been implemented for a Form, a list of candidates then becomes available. This feature operates identically here and in Flow. The available list is configured by the Administrator is Security. Forms can only be transmitted to the applicable configured users.

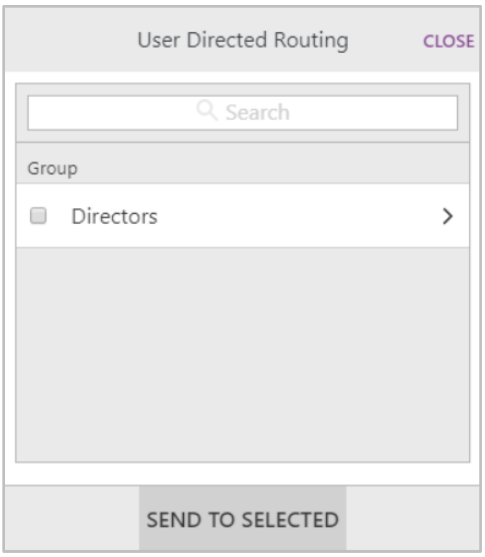


FIGURE 4.2 a Select the Group to View

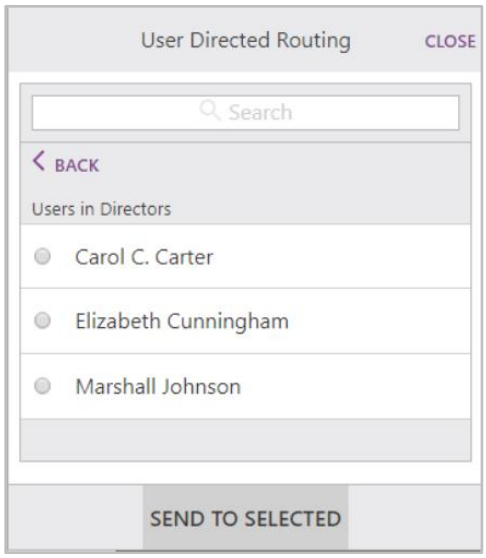


FIGURE 4.2 b Select Users to Receive Form / Package

A spinner icon will display when a user clicks the Submit button to indicate the form has been successfully submitted. A form can only be submitted once. Once submitted the form will disappear from the Viewer and a confirmation pop-up will appear in the lower right corner alerting that the form was submitted.

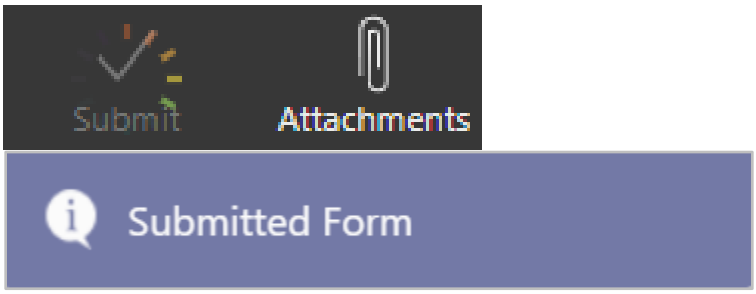


FIGURE 4.3 Submitted Form Confirmation

ATTACHMENTS | Users may upload file(s) to the Item that is currently being displayed in the Viewer. Click on the icon and a panel will be displayed where the user can select files and upload them. After attachments have been uploaded, when the icon is selected, there will be a red badge on the icon displaying the count of attached documents. There will also be a small image with three stacked squares. The user can select this icon to Edit, Delete or View the Attachment. When View is selected, the file will be downloaded in its native format.

FIGURE 4.4 Attachments Icon

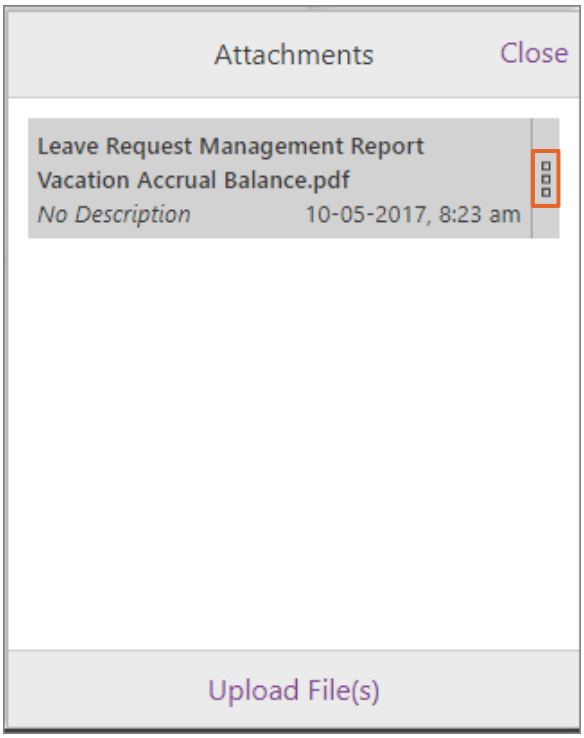


FIGURE 4.5 Attachments (Edit, Delete, or View)

DOWNLOAD | Downloads a PDF version of the Package. An Item with multiple pages includes all pages within the PDF. An additional page with the Package history information will be appended to the end of the Package PDF file.

PRINT | Print the current document.

When the user prints, exports, or downloads a form, all values entered in the form are preserved in the downloaded copy.

Forms that are commonly used to manage contracts and policy changes typically require a Broadcast Actor in the workflow. Broadcast Actors require the use of Etrieve Integrations, a separate module. A file can be sent to a filtered list of multiple users which eliminates irrelevant users and data that is not pertinent to the contract or policy change. Within this form the user can perform the following actions:

BROADCAST | The Display Names and E-mail Addresses that are received through workflow compiles a list of Etrieve Users to whom a form may be sent. E-mail Address is the only ID that can be used to connect the Etrieve User to the list of those receiving the form, and by default, any e-mail that matches an Etrieve User is automatically selected. Up to 100 results will be displayed at one time.

- Select All | Selects every user in the provided list.
- Deselect All / Unchecks every user that was checked; allows the Central User to choose specific Etrieve Users to receive the form by simply clicking on the Display Name.
- Filters /May be used to narrow the initial scope of Etrieve Users which may be selected to receive the Form. Click on Add Filter to add one or more Filters. Each category chosen will display multiple choices on a drop-down menu, and multiple Filters of the same type may be added. For instance, for the 'duty' Filter, the user may add a Teacher duty and a Staff duty. To remove the filter, select the (x) to the filter name.

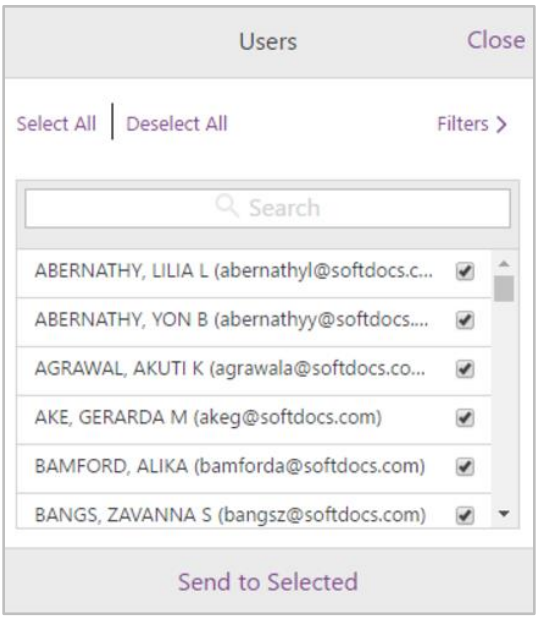


FIGURE 4.6 a Forms Panel | Broadcast Icon

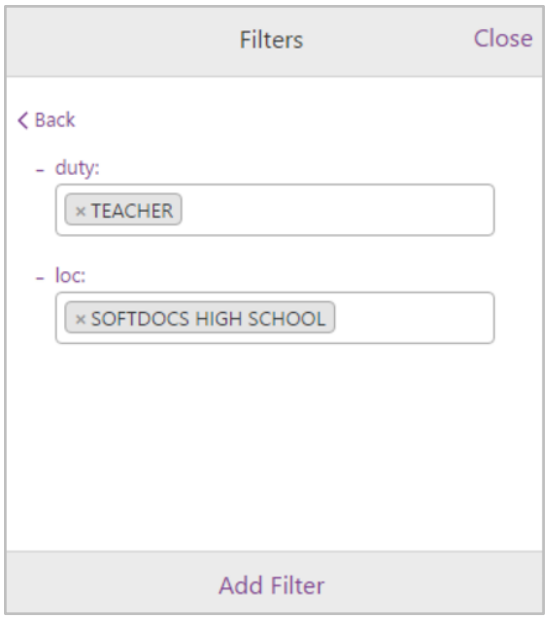


FIGURE 4.6 b Forms Panel | Broadcast Icon | Filters

PREVIEW | Cycle through the dataset and view the form from each individual Etrieve User's point of view. To scroll left, select Previous and to scroll right, select Next. A Hide button is available to remove the preview box from view and allows you to view a more substantial portion of the form. Up to 100 results will be displayed at one time.

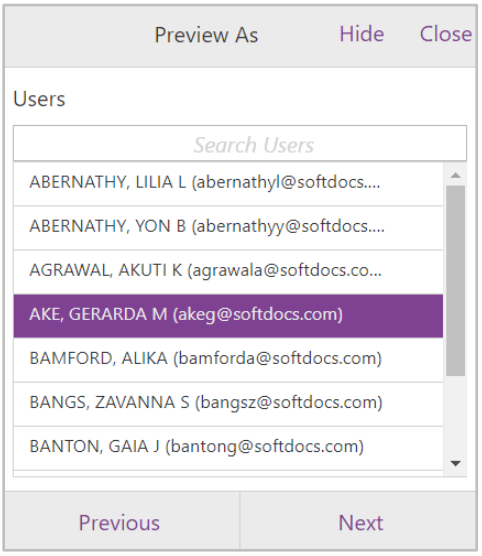


FIGURE 4.7 a Forms Panel | Preview Icon Full Page

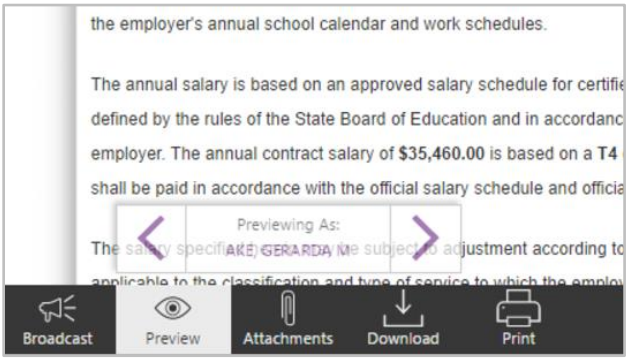


FIGURE 4.7 b Forms Panel | Preview Icon | Hide Engaged

ATTACHMENTS | Users may upload file(s) to the Item that is currently being displayed in the Viewer. Click on the icon and a panel will be displayed where the user can select files and upload them. After attachments have been uploaded, when the icon is selected, there will be a red badge on the icon displaying the count of attached documents. There will also be a small image with three stacked squares. The user can select this icon to Edit, Delete or View the Attachment. When View is selected, the file will be downloaded in its native format.

FIGURE 4.8 Attachments Icon

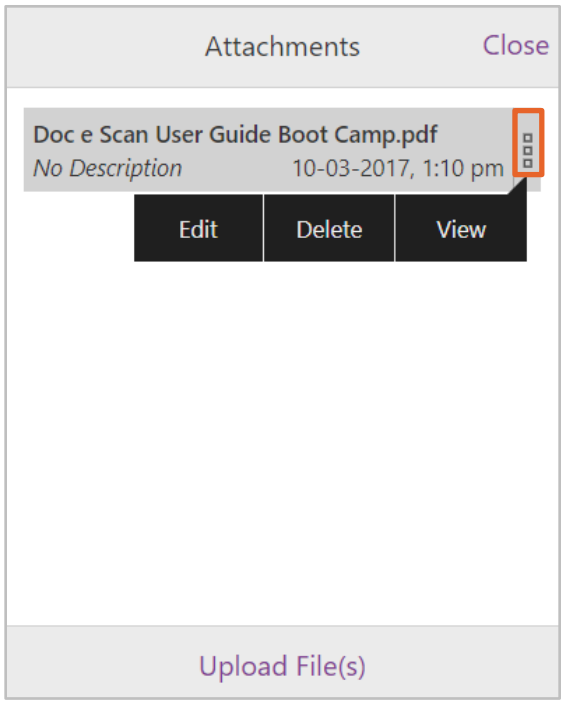


FIGURE 4.9 Attachment Options (Edit, Delete, or View)

DOWNLOAD | Downloads a PDF version of the Package. An Item with multiple pages includes all pages within the PDF. An additional page with the Package history information will be appended to the end of the Package PDF file.

PRINT | Print the current document.

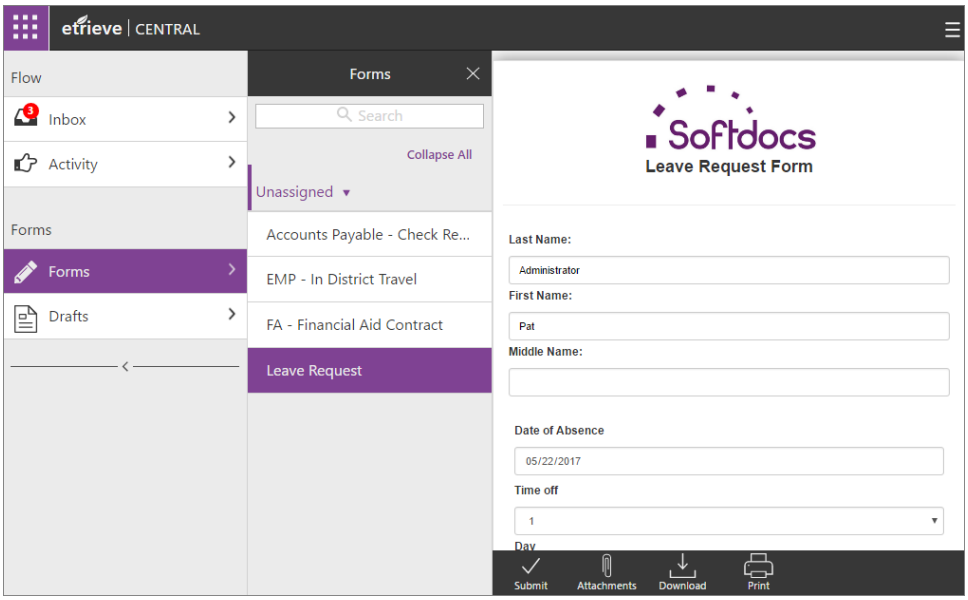


FIGURE 4.10 Forms User Has Permission to Edit/Submit

4.2 Drafts Panel

The Drafts Panel acts as a location for all incomplete forms. Here a user can manage, complete or delete forms that are in a 'work-in-progress.' The 'Edit' feature is located in the upper right-hand side of the Drafts Panel. When

Edit is selected, the options of Delete | Cancel will be displayed. Checking the box to the left of the Draft name and then selecting Delete will remove the draft. From the Drafts Panel a user can perform the following actions:

SUBMIT | Submit a form into its assigned workflow. Any field that is required but has not been completed when this button is clicked will be surrounded by a red border. A prompt will appear in the bottom right corner reminding the user to enter text in the required fields before submission.

If User Directed Routing has been implemented for this Form, a list of candidates then becomes available. This feature operates identically here and in Flow. The available list is configured by the Administrator is Security. Forms can only be transmitted to applicable configured users.

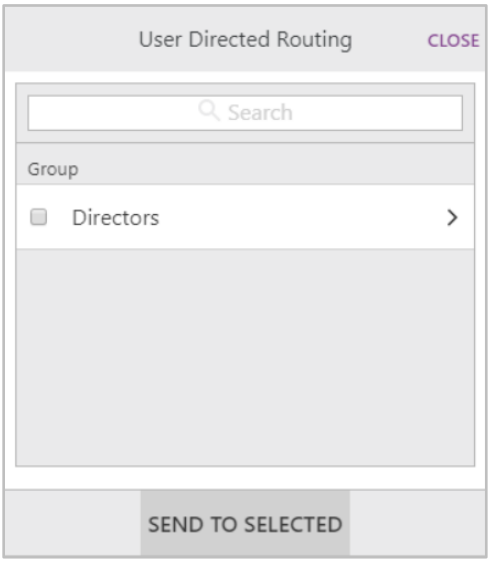


FIGURE 4.11 a Select Group to View

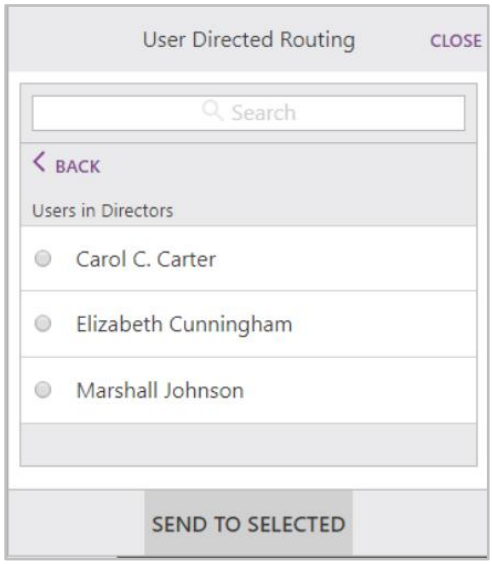


FIGURE 4.11 b Select Users to Receive Form / Package

A form can only be submitted once. Once submitted, the form will disappear from the Viewer and a confirmation pop-up will appear in the lower right corner alerting that form was submitted.

FIGURE 4.12 Submitted Form Confirmation

ATTACHMENTS | Users may upload file(s) to the Item that is currently being displayed in the Viewer. Click on the icon and a panel will be displayed where the user can select files and upload them. After attachments have been uploaded, when the icon is selected, there will be a red badge on the icon displaying the count of attached documents. There will also be a small image with three stacked squares. The user can select this icon to Edit, Delete or View the Attachment. When View is selected, the file will be downloaded in its native format.

FIGURE 4.13 Attachments Icon

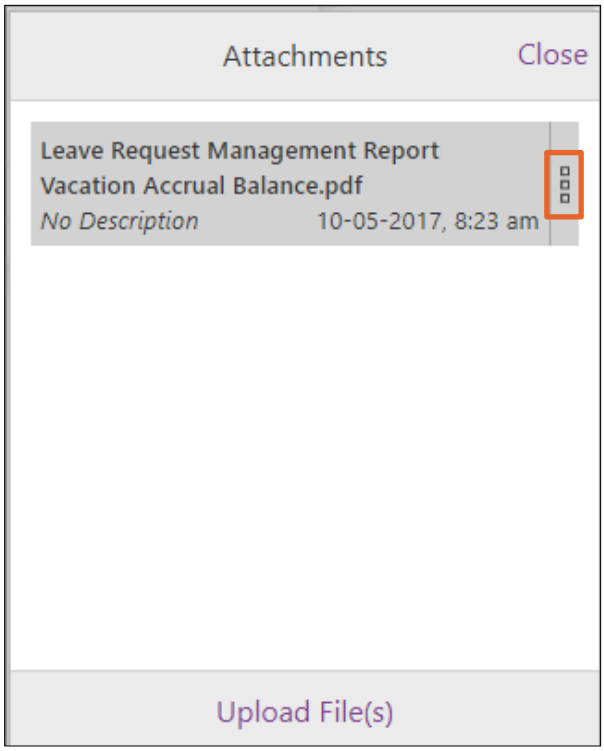


FIGURE 4.14 Attachments

DOWNLOAD | Downloads a PDF version of the Package. An Item with multiple pages includes all pages within the PDF. An additional page with the Package history information will be appended to the end of the Package PDF file.

PRINT | Print the current document.

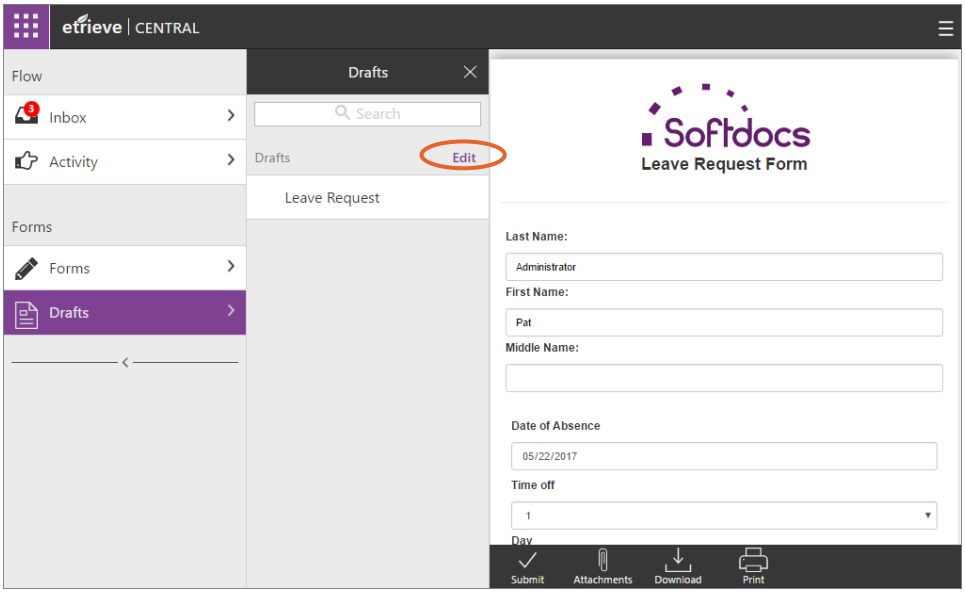


FIGURE 4.15 Drafts of Partially Completed Forms with Edit Option

5

Etrieve Reports

5.1 An Overview of Reports

Etrieve Reports is an add-on tool that provides a visual insight into the data living within the Etrieve sites. Reports provides a library of standard reports that have been built out of requirements and feedback provided by Etrieve customers. These reports are available both as raw grids of data and as aggregated bar graphs and charts, all of which are designed to provide a better understanding into the content within Etrieve. A Central user with permissions to view reports has access to the report from Central. Every user will see listed only the reports that they have permission to view. Reports can be shared with both Etrieve users and non-Etrieve users but only if they have the permissions to view them.

5.2 Accessing Reports

To access Reports, click on the Reports tab in the Primary Navigation panel.

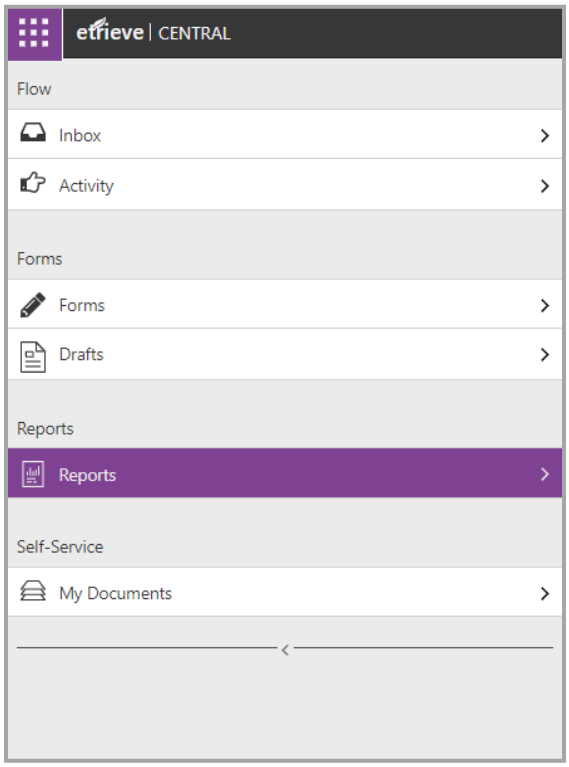


FIGURE 5.1 Reports in Central

A list of the reports available to the user will be displayed in the 'My Reports' panel, which will display in the center of the page. Reports are grouped by pre-defined categories.

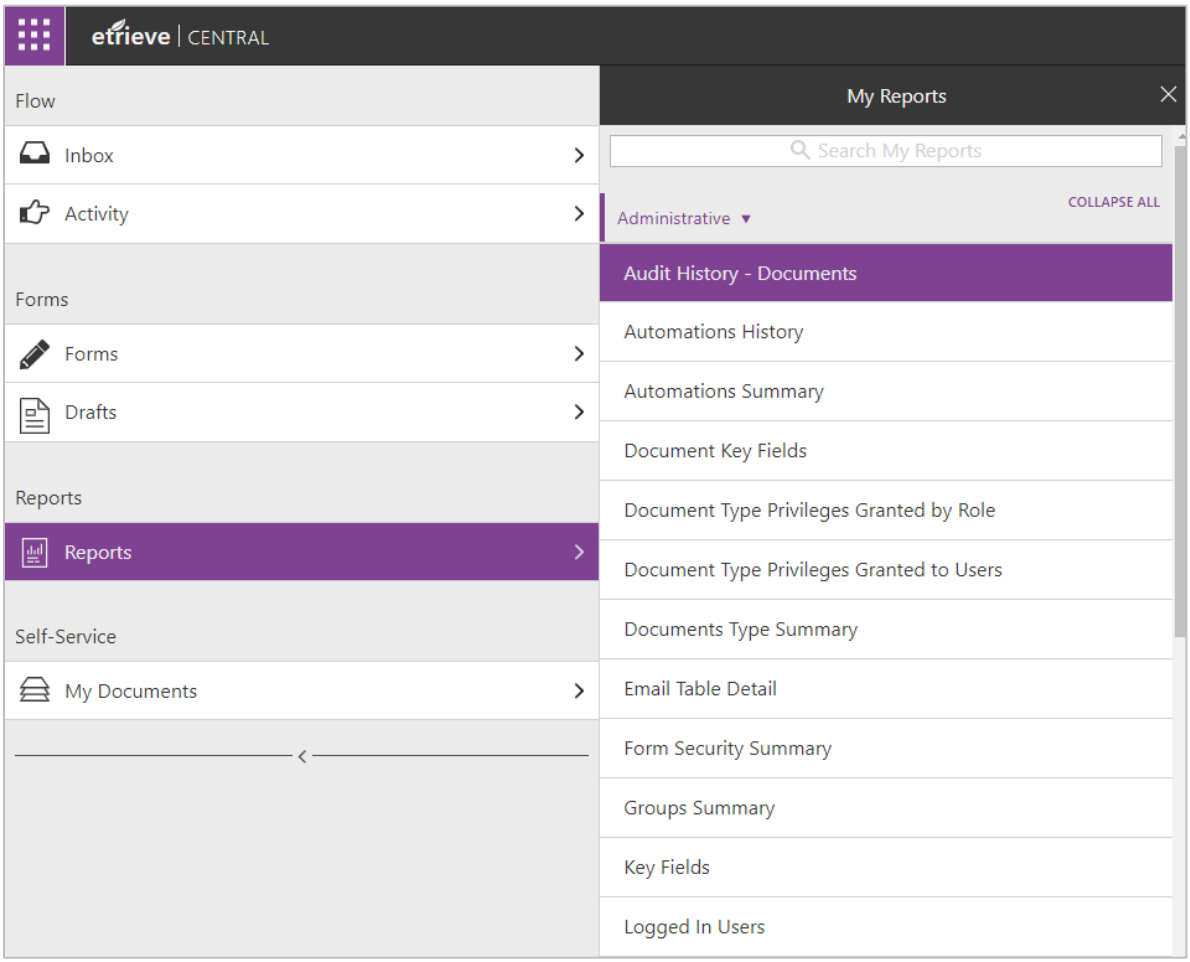


FIGURE 5.2 My Reports Panel

The categories can be collapsed or expanded by clicking on them. Users can also search for specific reports by entering a search term in the 'Search' field at the top of the My Reports panel.

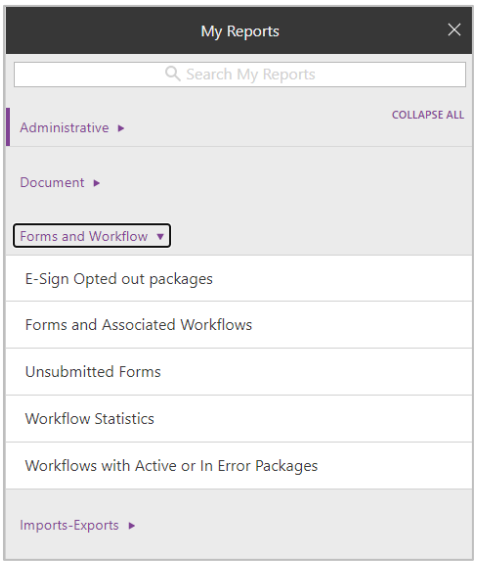


FIGURE 5.3 Collapsible Categories

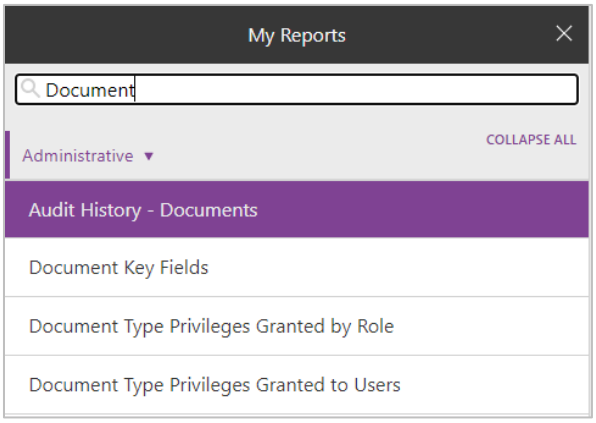


FIGURE 5.4 Search Field for Reports

5.3 Anatomy of a Report

To open a report, click on the report's name at the Reports sub navigation list. The report area will display the report's description, and the Search Parameters collapsed. Click the Search button to display the report's data.

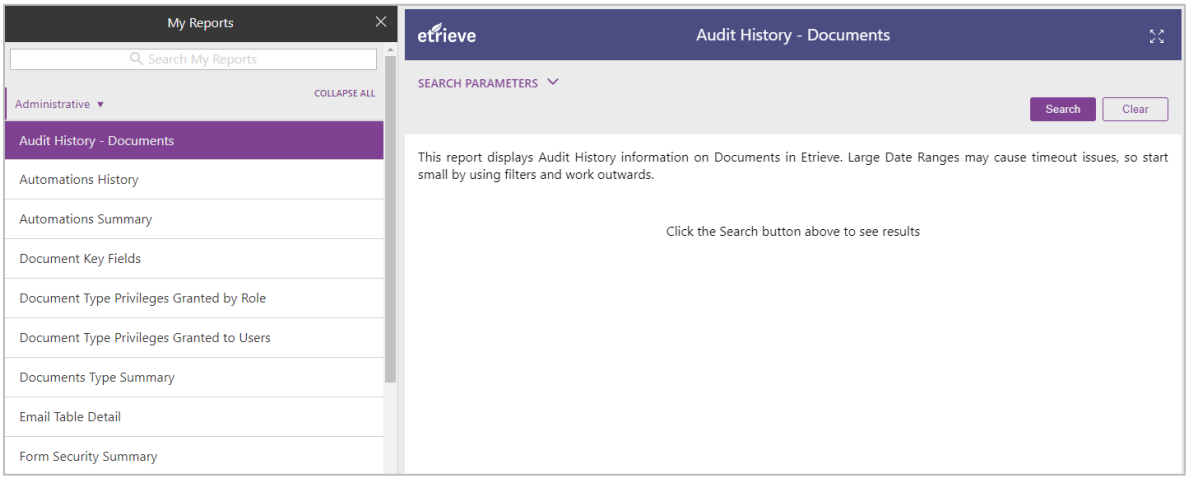


FIGURE 5.5 Reports in Central

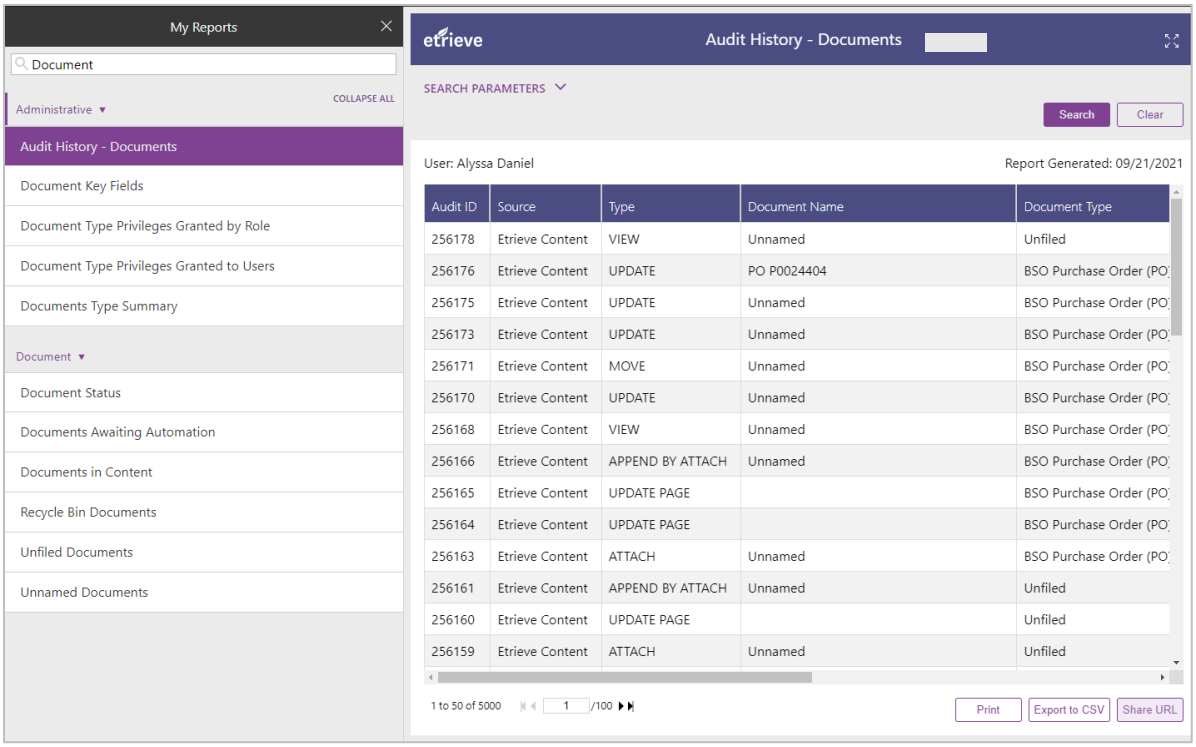


FIGURE 5.6 Displayed Report

Each report is composed of the same parameters. Please review below to understand best practices on how to adjust search terms and consolidate reports.

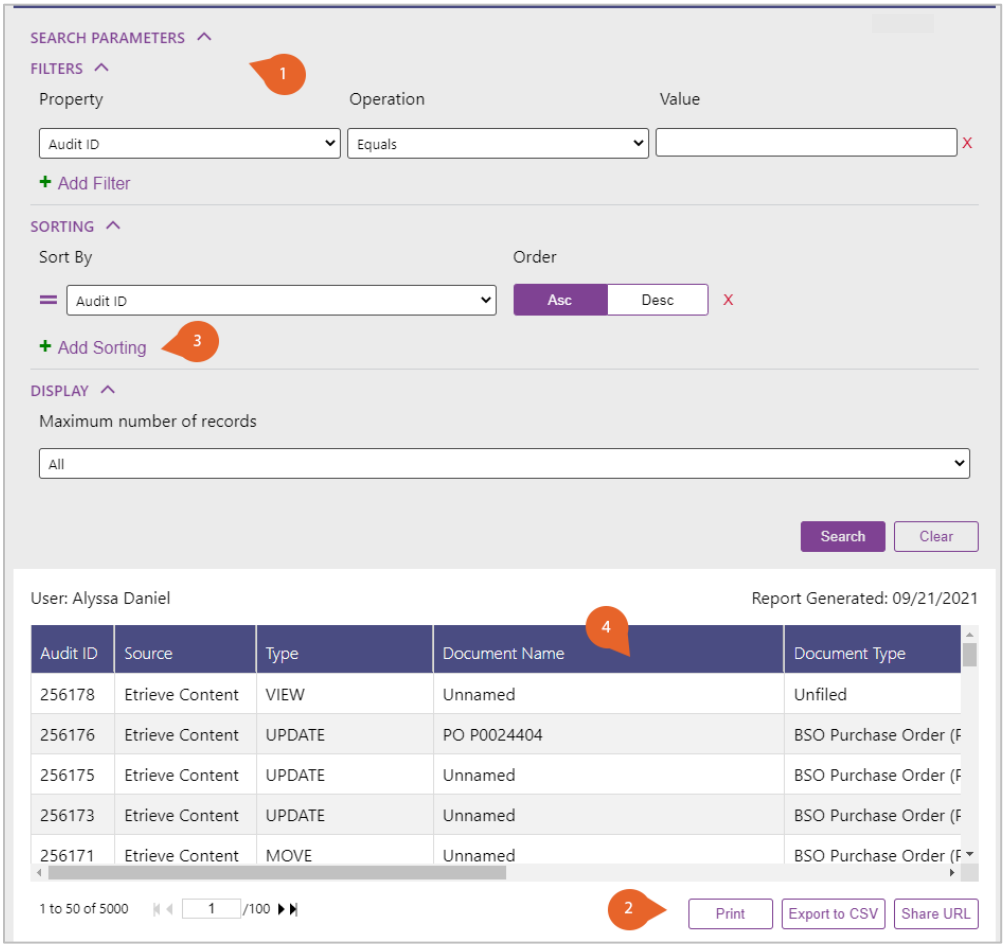


FIGURE 5.7 Etrieve Reports Sections

1 HEADER | The Search Parameters and the name of the report is listed at the top of the Reports page. Click the arrow to expand the search parameters.

2 MENU BAR | The menu bar resides at the bottom of the Reports page and allows the user to provide access to the report outside of Etrieve.

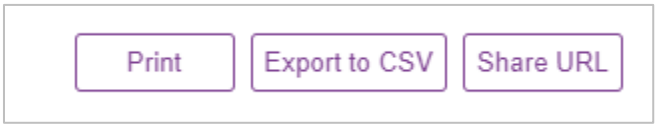


FIGURE 5.8 Menu Bar

PRINT | The Print button can be used to print the currently displayed report.
EXPORT to CSV | Users can export a report to an Excel sheet or a CSV file.
SHARE URL | Shares the Report URL to a user who has permissions to view the report.

3 SORTING RECORDS | This setting controls the number of records that are displayed in the main reports area.

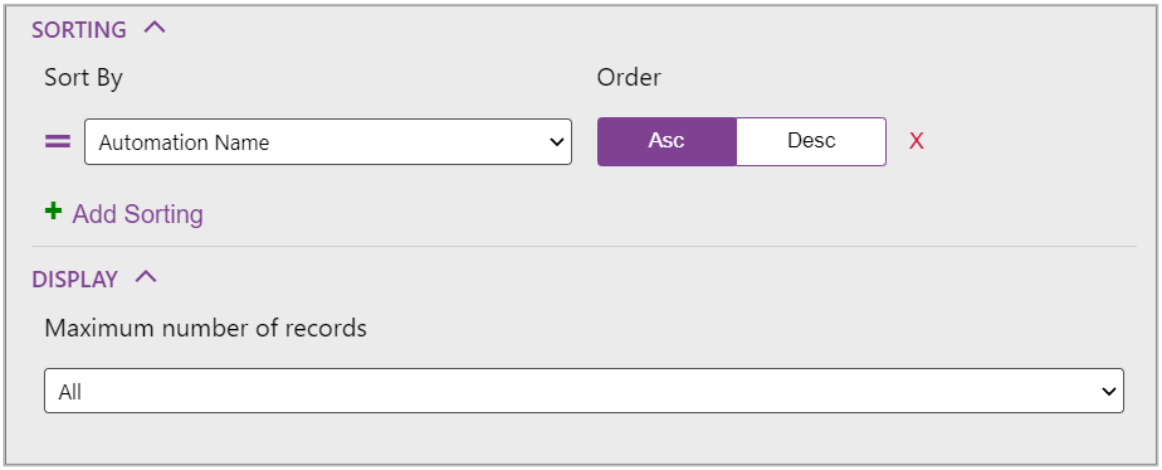


FIGURE 5.9 Sorting Records

NOTE | Setting this to All on a report can result in long load times if the report includes a large number of records. It is recommended to start with a small number of previews and then increase as needed.

FILTERS | Filters allow users to trim down large datasets into more concise results. Please review Section 5.4 to understand filters in more depth.

FIGURE 5.10 Filters

4 REPORT | The main area of Etrieve Reports contains the results of the report in a grid format. Reports have various columns displaying the information of the report. Columns can be expanded or shrunk by clicking & dragging the column splitter. Columns can be sorted by clicking on the column header once for an ascending sort, again for a descending sort, and a third time to clear the sorting. Links for documents or key fields can be selected to take the user to that item in Content.

NOTE | Links to Content will not bypass permission settings. Users will not be able to view any items for which they do not have the necessary security permissions.

Automation Name	Start Time ↑	End Time	Cancelled
Send to Workflow Template" PreventChaining="True	01/18/2021, 19:30:08.803	01/18/2021, 19:30:09.020	false
Send to Workflow Template" PreventChaining="True	01/18/2021, 19:34:48.817	01/18/2021, 19:34:48.927	false
Send to Workflow Template" PreventChaining="True	01/18/2021, 19:34:55.647	01/18/2021, 19:34:55.833	false
Send to Workflow Template" PreventChaining="True	01/18/2021, 19:36:38.787	01/18/2021, 19:36:38.877	false
Send to Workflow Template" PreventChaining="True	01/18/2021, 19:36:42.880	01/18/2021, 19:36:42.963	false

FIGURE 5.11 Report Body Example

GRID PAGE CONTROLS | Below are the page controls. Many report grids will return no more than 50 records at a time. The total number of records returned will be shown here, along with the total number of pages. Users can specify a page number to jump to, or can navigate to the last page by clicking the rightmost arrow.

FIGURE 5.12 Report Grid Page Controls

5.4 Filters

Filters are a useful way to narrow down the results of a report. Typical filters will sort report records according to date ranges, areas, document types, workflow names, and other common elements. To run a filter, simply define the values for the filter and click on the Search button.

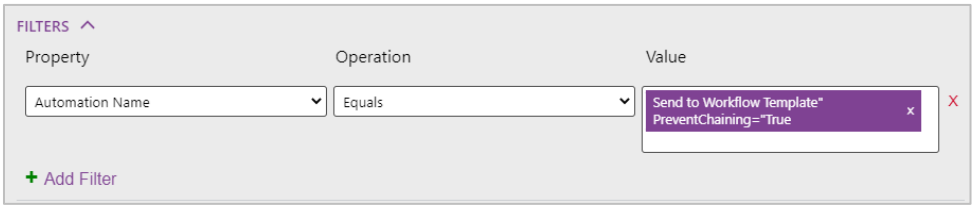


FIGURE 5.13 Filter Values Example

Each report has a list of available properties that can be used to filter the data.

The list of property data types, their operations and input values are as follows:

Property Data Type	Operation	Input Value
Text	Equals	Search suggestions available. It allows Multiple values.
Text	Not Equals	Search suggestions available
Text	Starts with	Free text. It allows multiple values
Text	Contains	Free text. It allows multiple values
Text	Does not contain	Free text
Date	Greater than	Date
Date	Less than	Date
Date	Greater than or equal to	Date
Date	Less than or equal to	Date
Numeric	Equals	Number
Numeric	Greater than	Number
Numeric	Less than	Number
Numeric	Greater than or equal to	Number
Numeric	Less than or equal to	Number
Boolean	Equals	True or False

Multiple filters can be used at a time.

NOTE | Filters are applied consecutively, from left to right. Area filters will narrow down the options for Document Type filters.

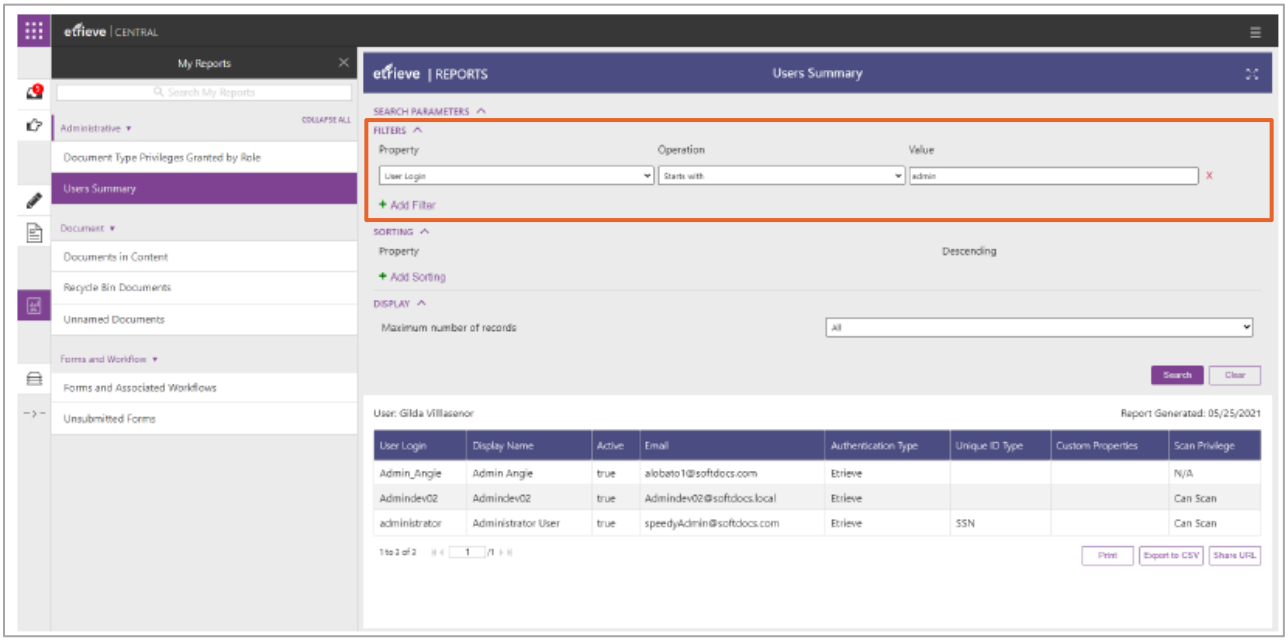


FIGURE 5.14 Multiple Filters

If filters are not needed, users can increase page space by clicking on the arrow next to Search Parameters to collapse the panel.

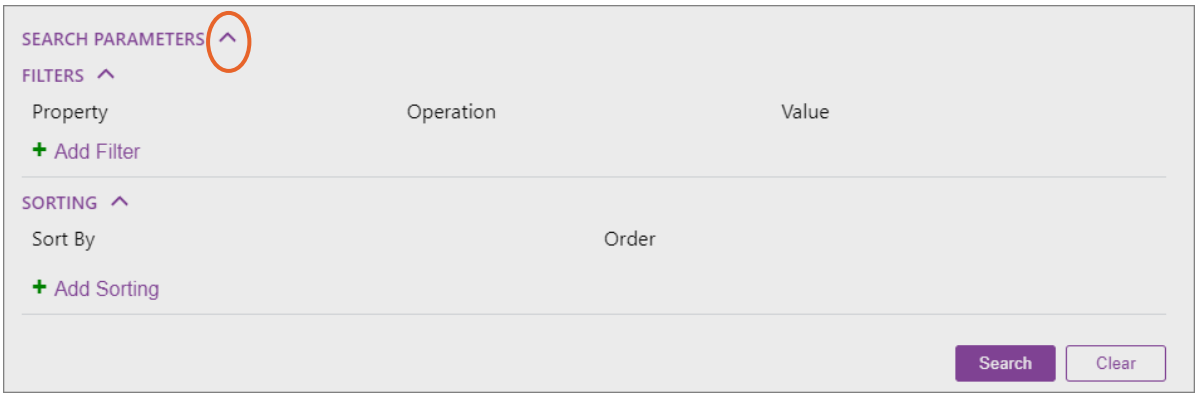


FIGURE 5.15 Collapse Arrow

5.5 Sub-reports

Some reports feature a sub-report component. Sub-reports include links to more detailed information, shown in a separate report from the parent report. Users will access sub-reports in the following main reports:

KEY FIELDS | Document Detail & Lookup Detail columns
DOCUMENT TYPE PRIVILEGES GRANTED BY ROLE | Role column

To access a sub-report, click on the link in the report. The column name for accessing sub-reports varies from report to report.

Key Field	Field Type	Field Rule	Rule Value	Document Detail	Lookup Detail
Academic Year	Text			Yes	
Accounts Adjusted	Text			Yes	
Action Type	Text			Yes	
Advisor ID	Text				
Advisor Name	Text				
Alternate ID	Text				
Amount	Text			Yes	
Any Date	Date				
Any Decimal	Decimal				

FIGURE 5.16 Sub-Report Link

Like reports, sub-reports may contain links to documents, key fields, or other items in Content. Clicking these links will take the user to the item in Content (if the user has the necessary privileges).

To return to the parent report, click on the link at the top of the sub-report.

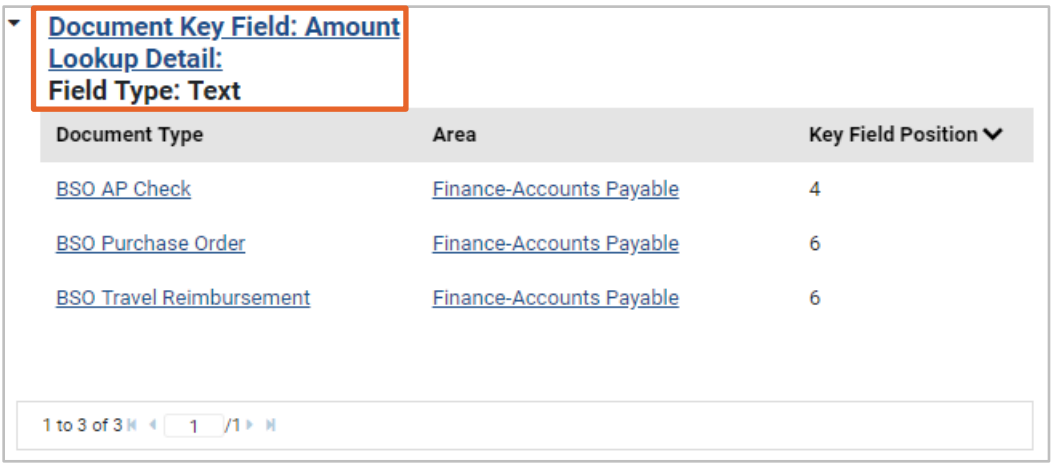


FIGURE 5.17 Link to Return to Parent Report

5.6 Printing & Exporting

Users can print any report by clicking on the Print link in the Menu Bar (see Figure 5.8). A new tab will open in the browser to choose print settings.

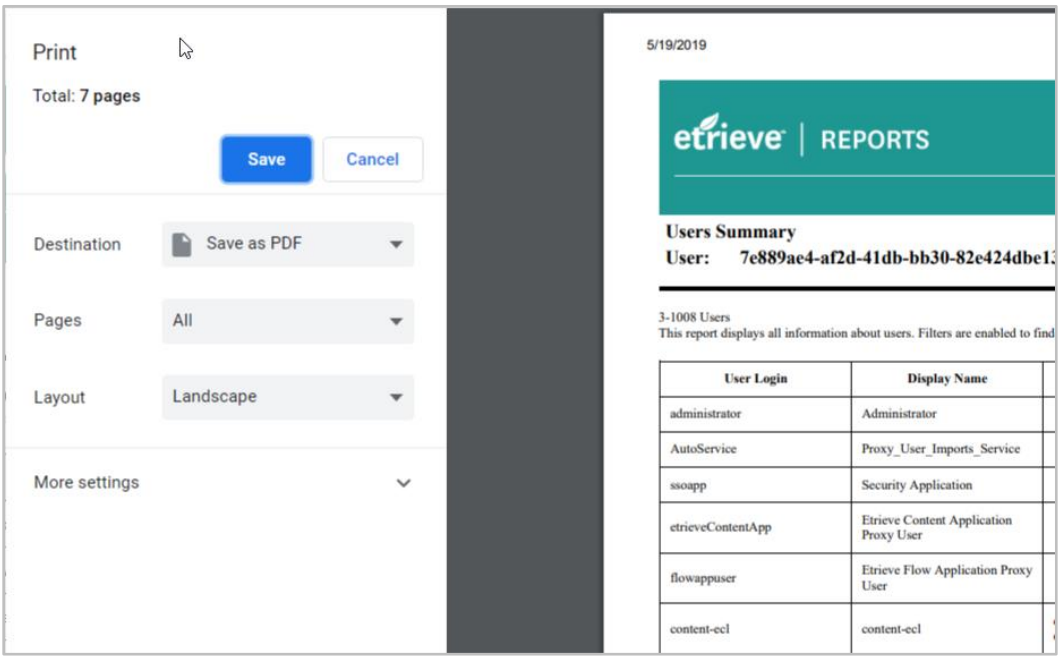


FIGURE 5.18 Print Options

Reports can also be exported to share with users outside of Etrieve. The Export option can be accessed through the Menu Bar to export the active report as either an Excel or CSV file. A dialog box will appear when exporting for the user to select where to save the exported report.

NOTE | Exported reports are static reports and not linked to the system, so data in exported reports will not update.

6

Self-Service

6.1 My Documents

Some institutions may elect to implement the Self-Service add-on component in Etrieve Central. Self-Service provides secure access to employee forms like direct deposit notices, paystubs, tax forms, and more. Privileges for Self-Service are assigned and maintained for access within Etrieve Security and Etrieve Content Configuration during system implementation.

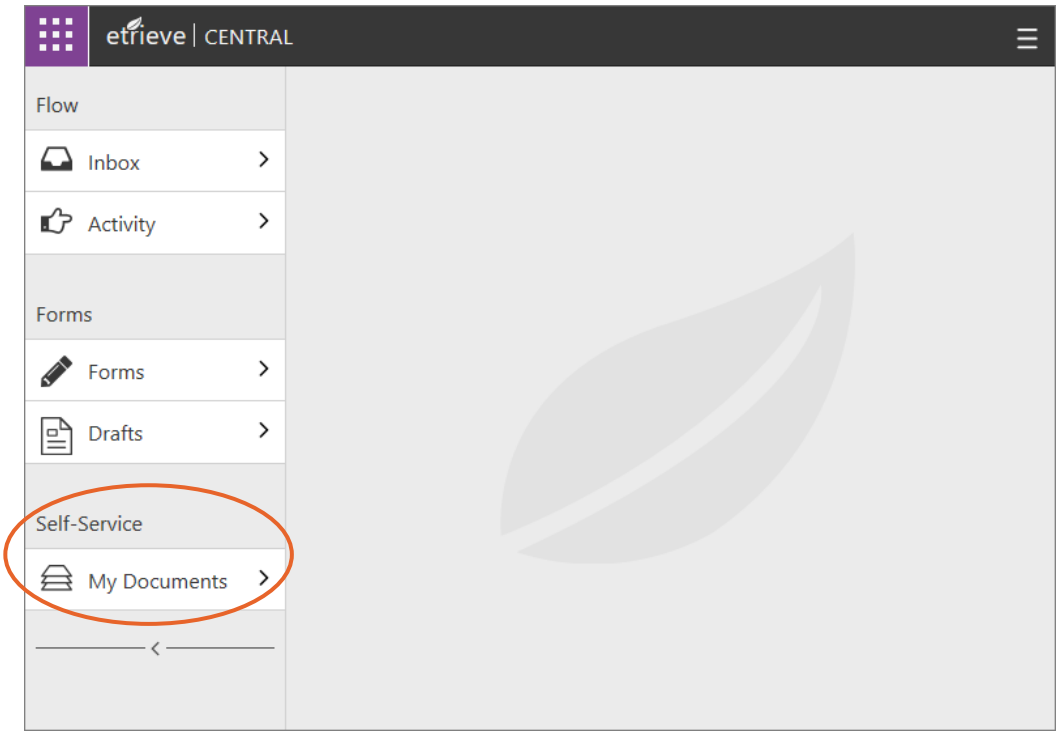


FIGURE 6.1 Self-Service

From the Document Viewer a user can perform the following actions:

DOWNLOAD | Downloads a PDF version of the document. A document with multiple pages includes all pages within the PDF. An additional page with document history information will be appended to the end of the PDF File.

PRINT | Print the current document.

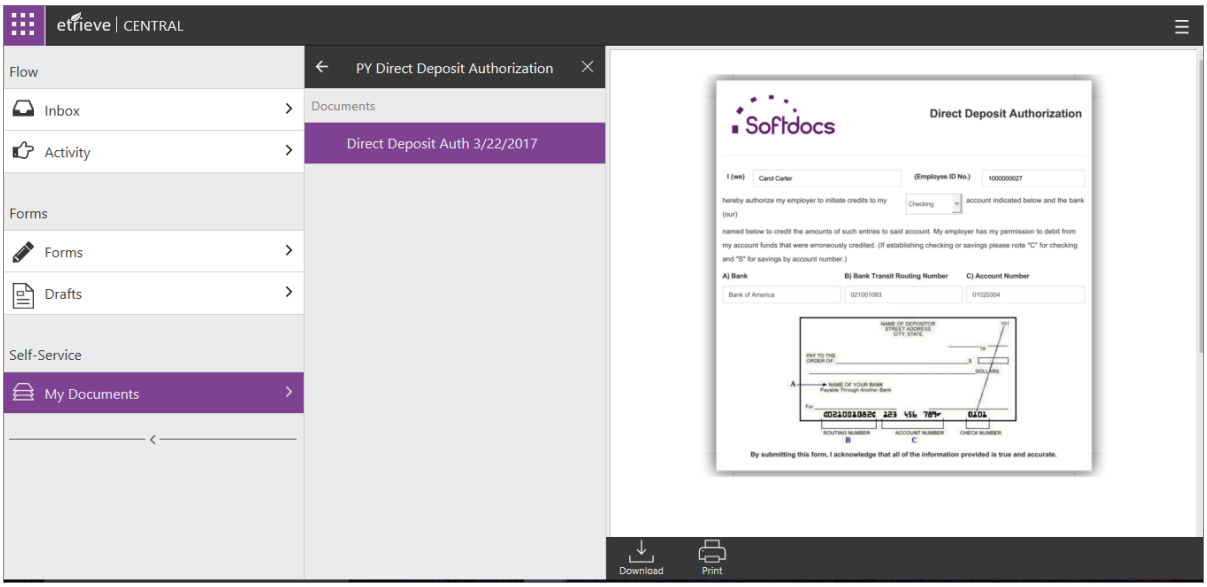


FIGURE 6.2 Self-Service – Document Viewer