

# Softdocs Etrieve Quick Guide

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## 1.0 GET STARTED

### 1.1 DEVELOPER ACCESS

If you are new to developing an Etrieve form, you will need to submit an IT Helpdesk ticket requesting developer access and support.

- Create an IT Helpdesk ticket - select Software/Applications > Softdocs
- IT will add you to the Developers LDAP group and grant you access to MS Team-Softdocs where you will find training documents and videos.

### 1.2 FORM STANDARDS

- Branding (UofM Logo required)
- SSN is not allowed on any forms
- Always create a test form first and save the form in the 'Test/Development' folder with a form name format "Dept abbreviation – name of form – TEST"
- Don't use the signature pad for UofM employees, SSO is sufficient
- Approval statements must be included for approvers
- Publishing requires a meeting with the IT Support group. Update your IT Helpdesk ticket requesting a meeting.

### 1.3 RESOURCES

- UmWiki – list of resources <https://umwiki.memphis.edu/display/ITBIS/Softdocs+Etrieve>
- MS Teams – [Softdocs](#) you will have access to:
  - PowerPoint Training Documents
  - Training recordings
- Softdocs Etrieve login – URL <https://etrievecentral.memphis.edu>

## 2.0 TYPES OF FORMS

There are two types of forms, simple and complex. Complex forms may require IT resources during development. Below are guidelines to help you determine the type of form you will be creating.

### 2.1 IT HELPDESK TICKETS

- If you have not submitted an IT Helpdesk ticket for 'Softdocs' support, one is required to provide technical support. Select Software/Applications > Softdocs.

## 2.2 SIMPLE FORM

- Workflow does not require signatures
- 'Saved Section' fields can be used
- No Banner data will be pre-populated
- Does not require approvals
- Form is sent directly to a department upon submission
- Requires a meeting with IT Technical Support group for review before publishing

## 2.3 COMPLEX FORM

- Workflow does require approvals/signatures
- 'Saved Section' fields can be used
- Banner data can be used for pre-populating form
- Required process review with the Softdocs review team before development begins
- 'Saved Section' fields can be used
- Requires a meeting with IT Support group for review before publishing

## 3.0 CREATING COMPLEX FORMS

### 3.1 LDAP GROUPS

- LDAP groups can be used for granting form access
  - Review the [Softdocs Umwiki page](#) to determine if the LDAP group already exists in Softdocs
- For New and Existing groups to be released to Softdocs you must create a separate IT Helpdesk ticket. Select Software/Applications > Softdocs
  - New LDAP group - provide a group name and suggested email
  - Existing LDAP group - does not appear on the wiki page, provide the existing group name and email to be released to Softdocs

### 3.2 DEVELOPING FORMS

- Importing Banner data, use source database connection to **UofM Banner Test**. Ex. use the 'getUidUuidPidmNameById' source in the viewmodel.js for the form. Update your IT Softdocs helpdesk ticket if you need IT assistance
- Identify users for testing to be added to the form (for example Joe & Sue). Update your IT Softdocs helpdesk ticket with a list of individuals/groups needed for testing

## 4.0 PUBLISHING

### 4.1 BEFORE YOU PUBLISH

- Make a copy of your form and give it the final name with the format of "Dept Abbreviation – name of form" for Production

- Save the form in the appropriate department form group
- Identify the correct groups/users needing access
- Identify approver groups if workflow is included
- Identify roles – action users can take ex: submit, approve, return for correction, cancel
- Update your IT Softdocs Helpdesk ticket you are ready to publish. IT will schedule a meeting to review your form, test workflow, set up group/user access, and update the database connection to UofM Banner Prod
- After review, you will be able to publish the form
- Update your webpage with a new form name (if needed) and add a hyperlink to the form