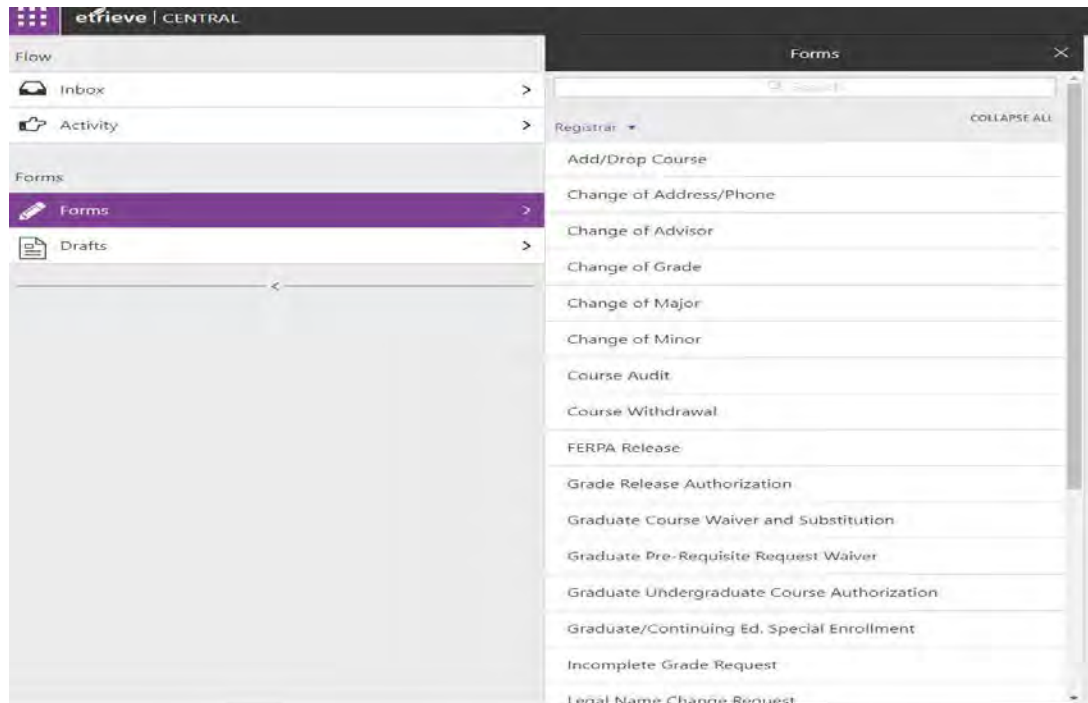
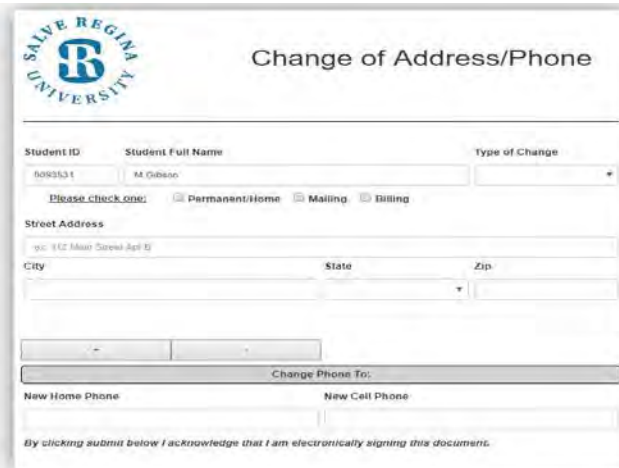


## How To Find And Complete Your Etrieve Form

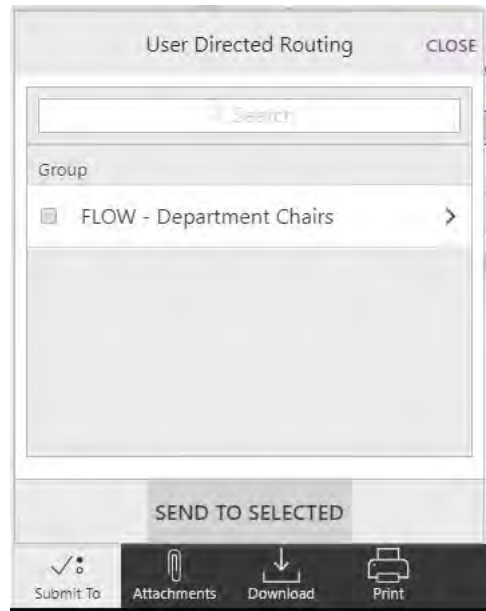
- Once you login to Etrieve you will see a list of available forms that you have access to complete.
- To view the list of available forms, click the arrow on the forms tab and scroll down.
  - You can also search for a form at the Forms tab.



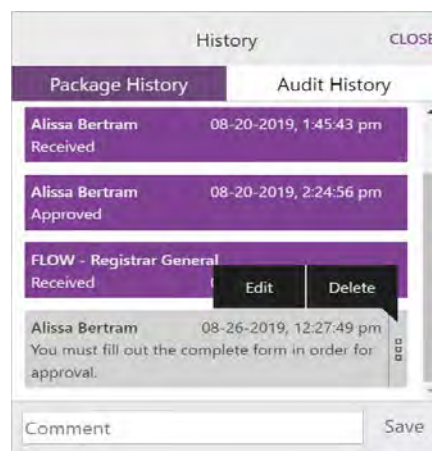
- Once you select the form you would like to complete, click on the form and fill in the blanks.
- Once your form is filled out you may have a few options at the bottom of the form to select from, depending on the form.



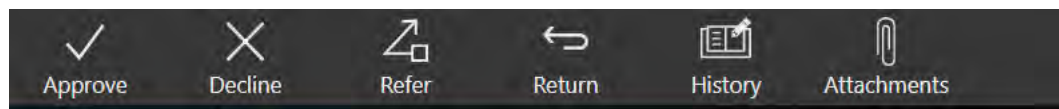
- The most common option will be the Submit button. Pressing the submit button will send the form to the next person/office in the workflow to approve the form.
- The second option will be Submit To. In this option you will select a group such as:
  - Instructors
  - Department Chairs
  - Program Directors



- Once you select the group, you will then select an individual's name from the group and then click the button Send to Selected.
- The third options is Approve To. In this option you will also select a group such as.
  - Instructors
  - Department Chairs
  - Program Directors
- Once a form is available for approval, you will have an option to put in Comments that the sender or other individuals in the work flow can see and can write comments back.



- Once you enter a Comment you must hit Save. If you need to edit or delete the comment, the option is available by clicking on the three dots on the right-hand side of the History box.
- The other options available for approvers are: Refer, Decline and Return.
  - Refer—When you choose refer you can pick another individual at Salve to send a copy of the form to and have them review it, and then they will only have the option to then Approve the form.
  - Decline—When you choose decline that means this form cannot be approved and the requester is denied approval of the form.
  - Return—When you choose return this returns the form back to the sender so they can resubmit the form. This is usually used if the sender needs to update information on the form before it is approved. The person returning the form should make a note in the History section so the sender knows what to correct in order to resubmit the form for approval.




- Before submitting your form you have some additional options at the bottom.
  - The Attachment option. This is required for some forms that require additional documentation. To use this option, you click on the Attachment button and then click Upload File.



- Once you select the file and it has uploaded, you click the Close button on the screen.
- Other options at the bottom of the form are the ability to Download the form as a PDF or to Print a copy of the form.
- In Etrieve Central you will have some other options besides the form tab.
- Inbox is the folder where all of the forms you have received are stored.
- Activity allows you to view activity on all previously submitted forms.

Once a form is submitted the person submitting the form will receive an email to their Salve email address letting them know if the form was approved, declined, or returned.

Etrieve Flow Notification



SE SoftDocs Etrieve Today, 10:47 AM M Gibson

Reply all

The workflow package 'Undergraduate Special Enrollment-M Gibson-0093531' containing a document submitted by you has been Approved by Alissa Bertram.

To access it, please [click here](#).

If a sender completes a form that needs approval, the person the form needs approval from will also receive an email to their Salve email.



SE SoftDocs Etrieve Alissa Bertram

Etrieve Flow Notification

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The workflow package 'Grad Special Enrollment - 0093531-M Gibson' has been submitted by M Gibson and is available for your review

To access it, please [click here](#).