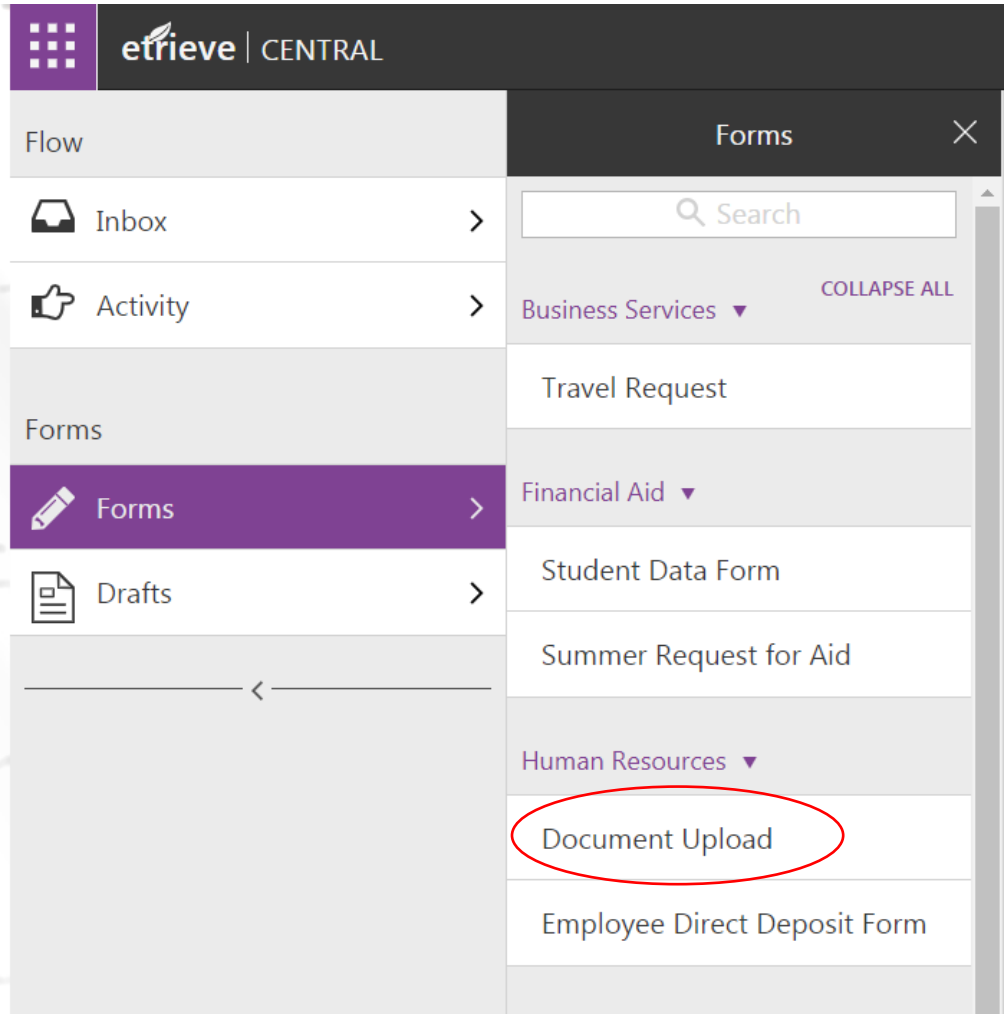
Instructions for Document Upload on Etrieve

Step 1: Login: Single Sign On

Step 2: Click on Etrieve

Step 3: Click on Forms

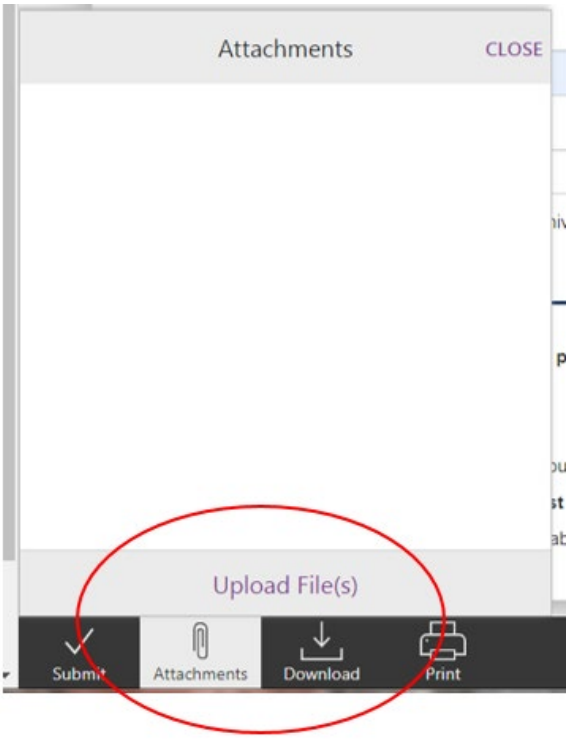
Step 4: Click Document Upload under the Human Resources section

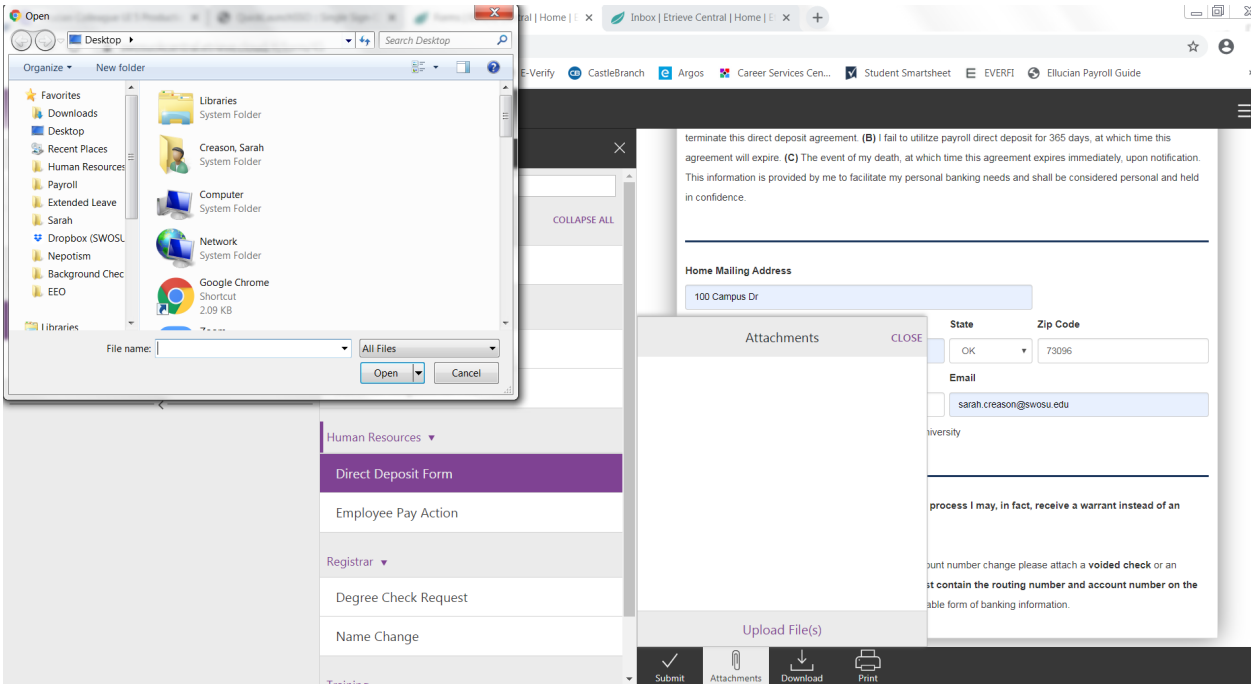


Step 5: Complete the form. Please only send time sheets or leave of absence reports through this form.

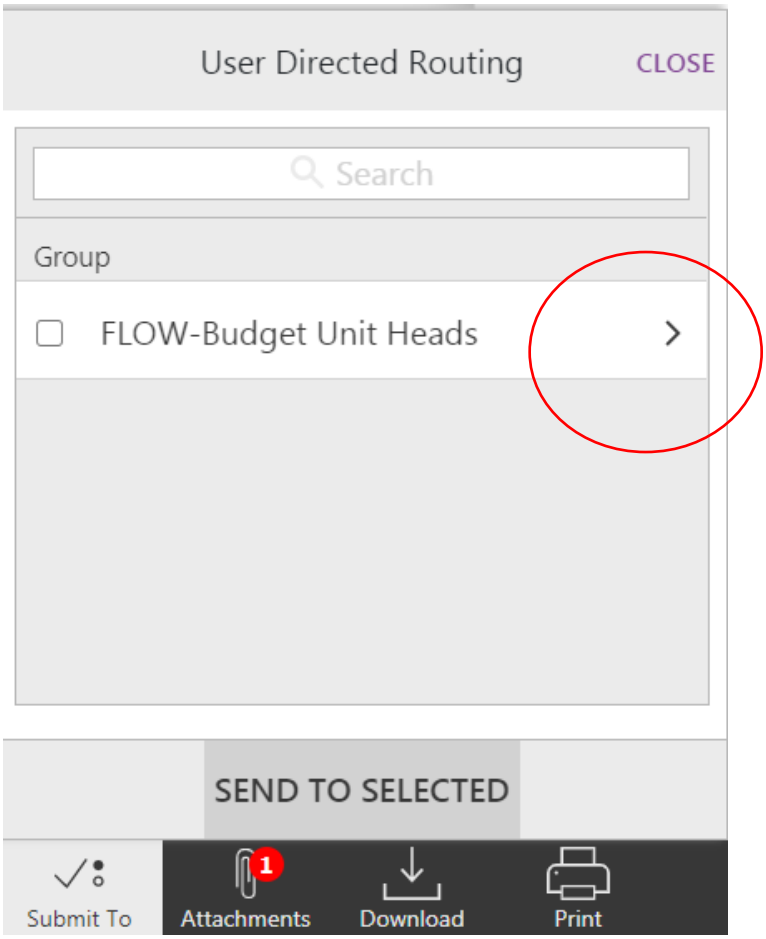
Step 6: Upload the applicable document by clicking on the attachment button. It will need to be in either a .jpg, .tif, .pdf, .xps, .jpeg, .png, .tiff, .bmp, .gif. format (a picture from a cell phone will work).

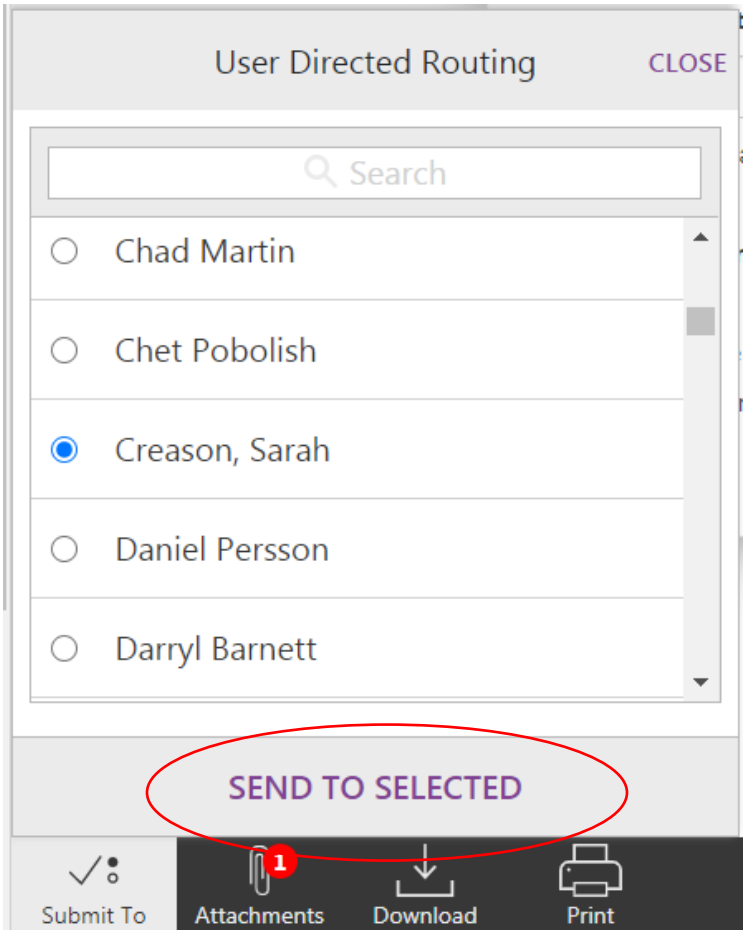
To upload an attachment, first click “Attachment” and then click “Upload File(s)”. A box will pop up for you to select the document to upload.



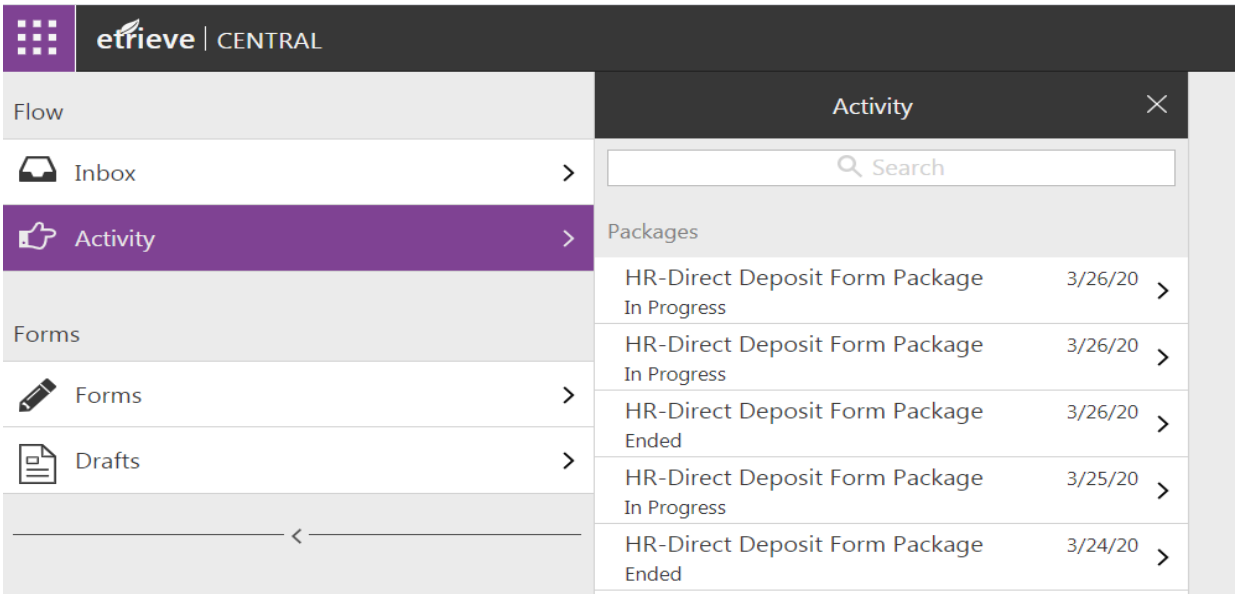


Step 7: Once the document has been attached, (The attachment is successfully attached by the 1 circled in red). Click the checkmark “Submit to” and select the arror to the right of “FLOW-Budget Unit Heads” and then click on the appropriate Budget Unit Head. Then click “Send to Selected”.

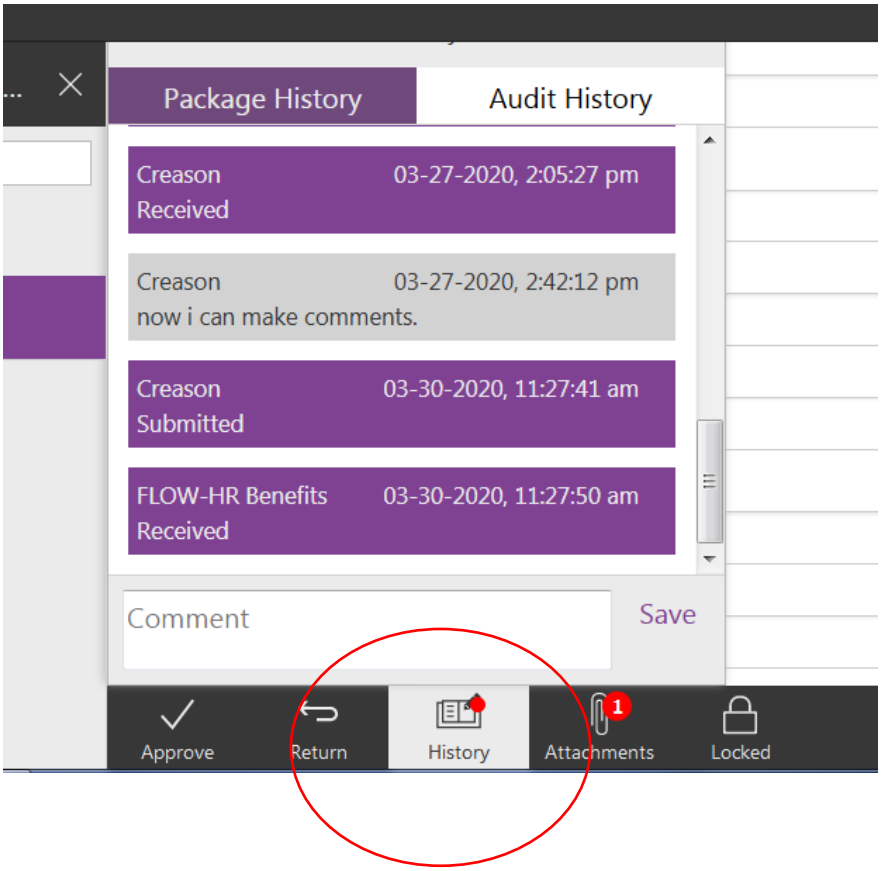

User Directed Routing
CLOSE
Search
Group
FLOW-Budget Unit Heads
SEND TO SELECTED
Submit To
Attachments
Download
Print


User Directed Routing
CLOSE
Search
Chad Martin
Chet Pobolish
Creason, Sarah
Daniel Persson
Darryl Barnett
SEND TO SELECTED
Submit To
Attachments
Download
Print

Once the form has been submitted, you can click on “Activity” to see the status of any form you have submitted (it’s referred to as a package).

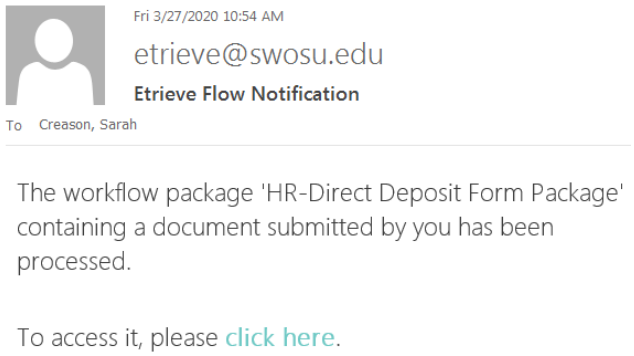


If an error is found on the form, it will be sent back to the person who originally submitted the form. If this happens, there will be a red dot on the history tab. If you click on the history tab, it will show you the comments on why it was sent back.



Comments can be added when the history button appears. To add a comment, click on the history icon and the comment/history box will appear. You will only have access to submit a committ when the form is assigned to you. You will always be able to view comments on the form under “Activity.”

Once your form has been submitted and processed, you will receive an email advising the form is complete. (This could be days later since the Budget Unit Head and Connor have to process it).



If you have questions, please email time@swosu.edu.