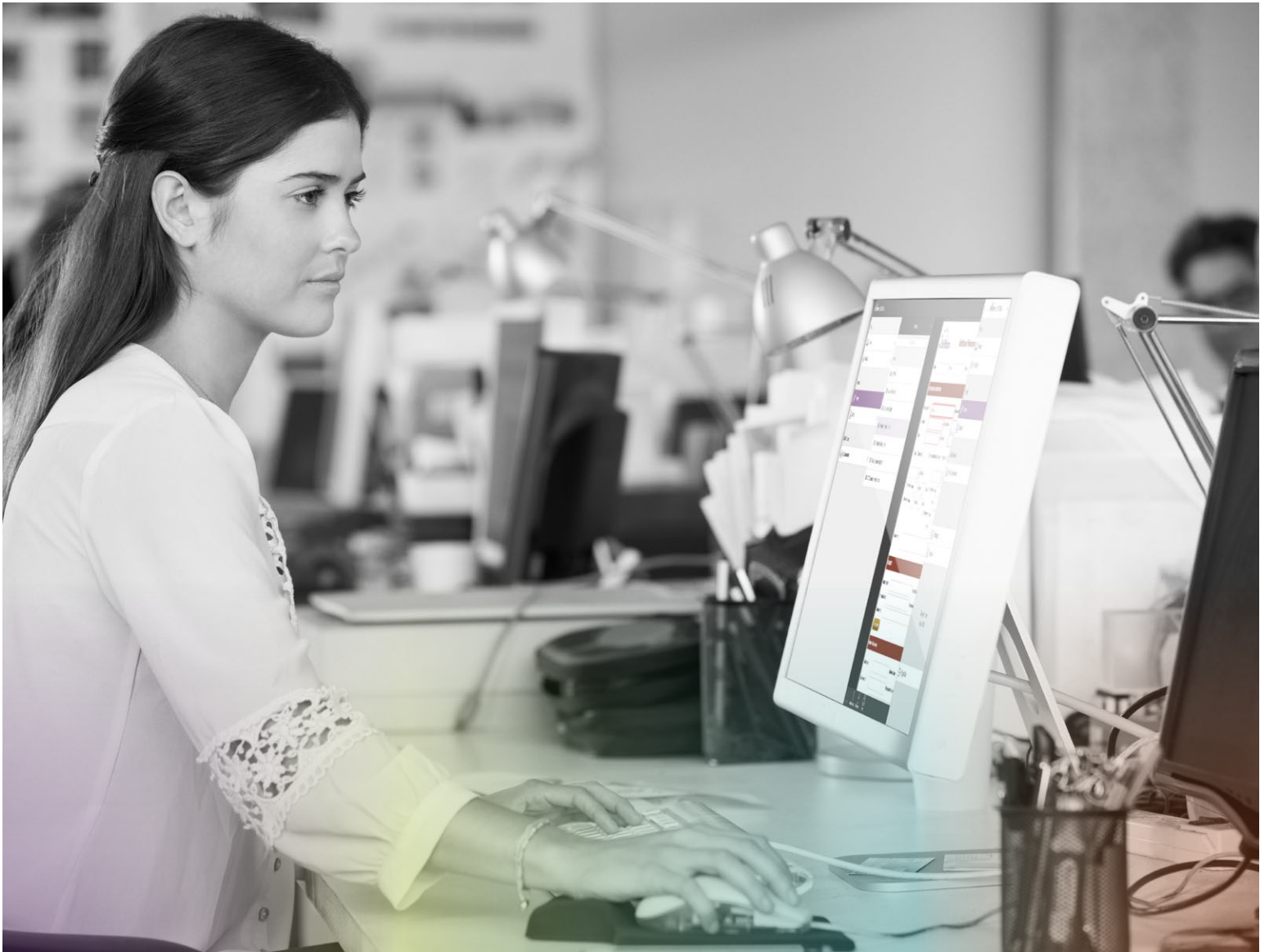




etrieve[™]
by Softdocs

Central User Guide

VERSION 2024.1



VERSION 2024.1



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Etrieve Central User Guide | October 2024

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1

Etrieve Central Overview

1.1 What is Etrieve Central?

Etrieve Central is a browser-based, mobile-friendly electronic forms and document management system. Etrieve Central is designed to be:

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

1.2 Logging into Etrieve Central

Before logging into Etrieve Central, a user should 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 Softdocs Identity and Access Management (IAM) platform sign in page will be presented, unless the institution elected to have users immediately redirected to their third-party single sign-on provider.

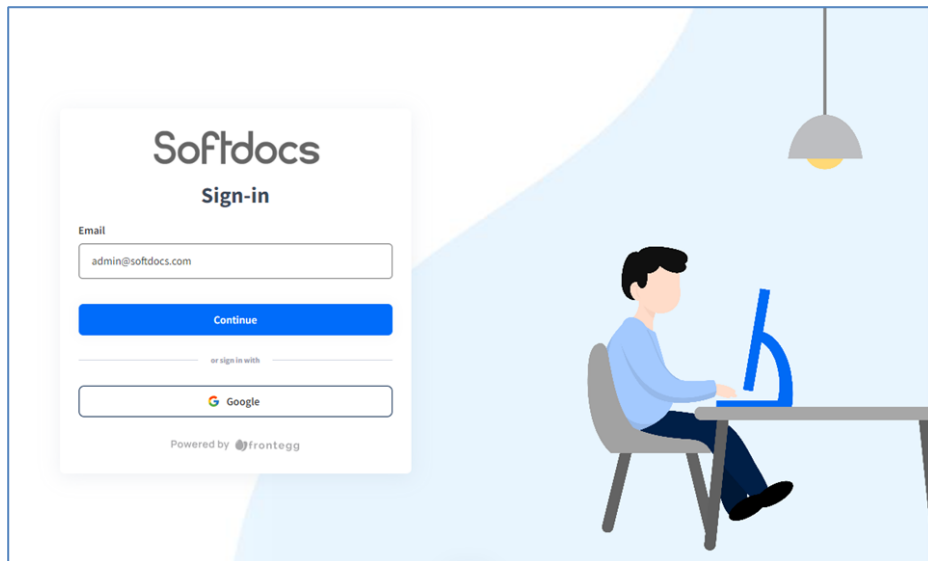


FIGURE 1.1 Softdocs IAM Sign-In Page

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

Users signing in via their institution's SSO provider or with a password will enter their email on the Softdocs IAM sign-in page and click 'Continue'. The IAM platform will use the email domain to decide whether to direct users to SSO or display a password field. If enabled by the organization, users may see social platform login options. Social logins are for public users who can't access an institution's SSO and don't have an Etrieve account. Organizations can customize the IAM sign-in page with their own branding

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

- ▶ Header (top bar)
- ▶ Primary Navigation Panel (always displayed on the left side of the page)
- ▶ Setting 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 sections will vary depending on the user's security settings. For instance, the Admin Settings selection in the Settings Panel on the right will only display if the user is granted the privilege to manage Workflows or Forms.

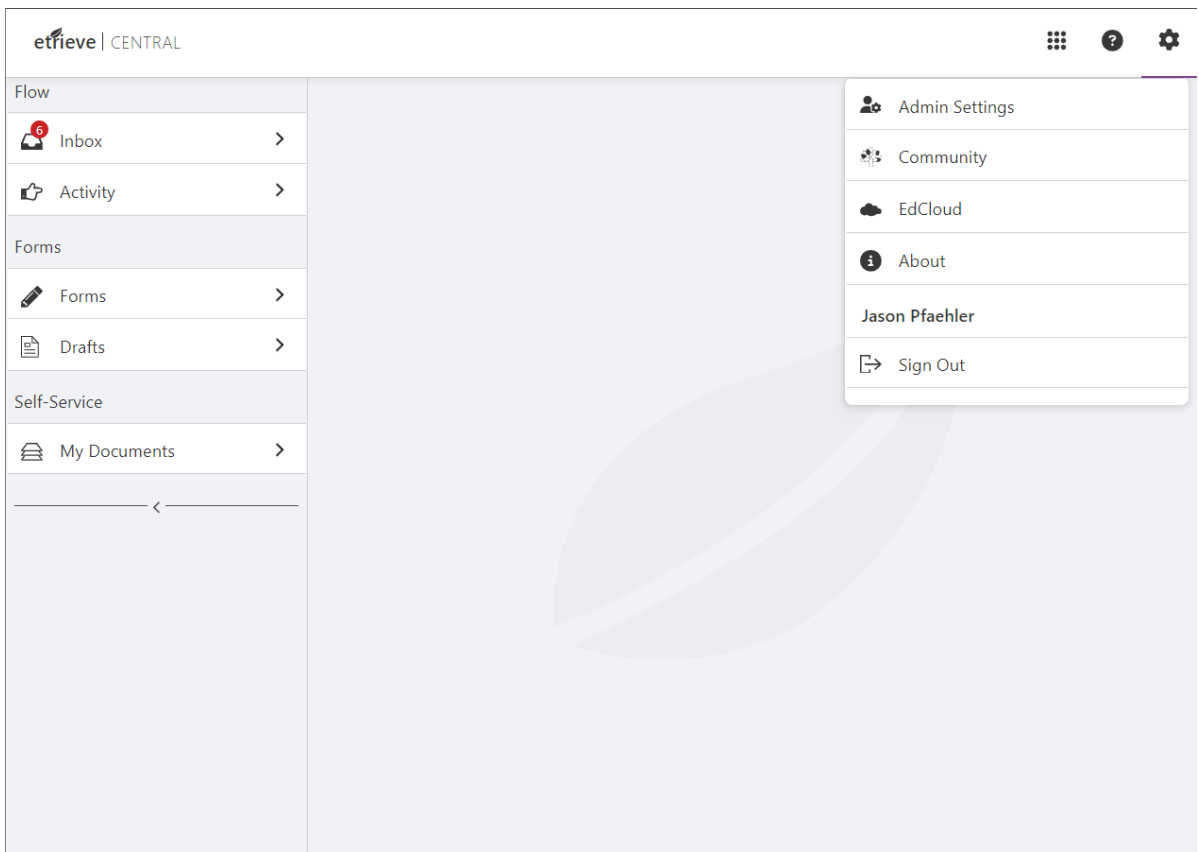


FIGURE 1.2 Etrieve Central Page Layout

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 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, you will see links that can be accessed by tabbing through or via the screen reader. These links lead to forms, content, and security.

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 Panel is located on the left of the home page and consists of two sections, Flow and Forms, with sub-panels containing available Flow and Forms options. An institution may purchase and install Etrieve Reports and Etrieve Self-Service, which will also appear in the Primary Navigation Panel.

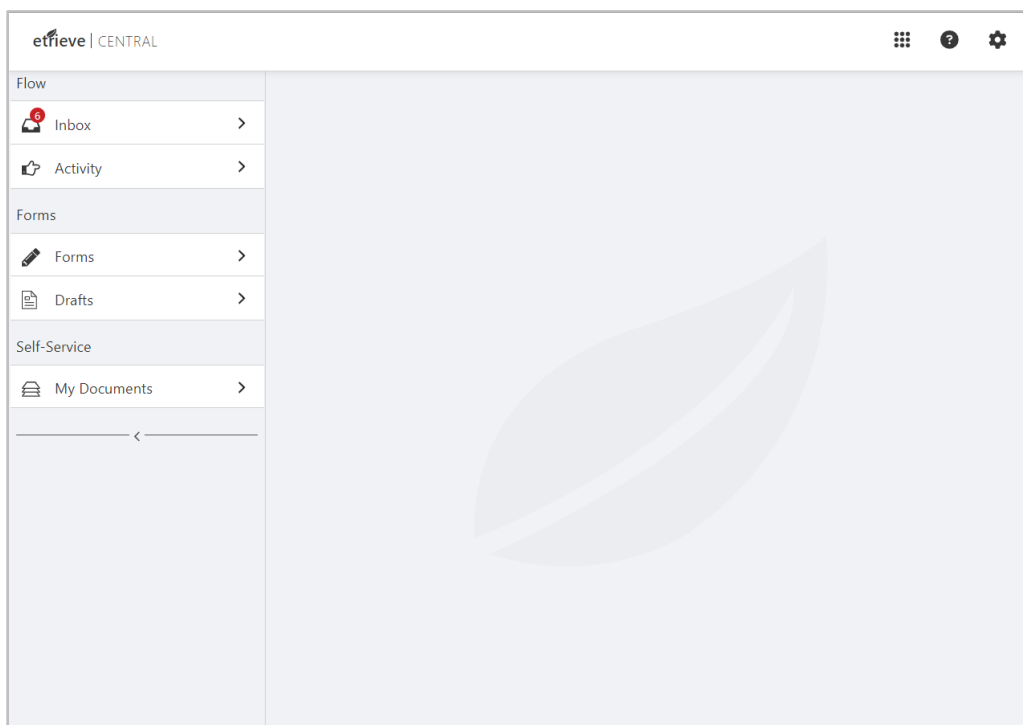


FIGURE 2.1 Etrieve Central Home Page

The Document Viewer displays when the user works with items in one sub-panel. It will show for Inbox, Activity, Forms, Drafts, Reports, and Self-Service.

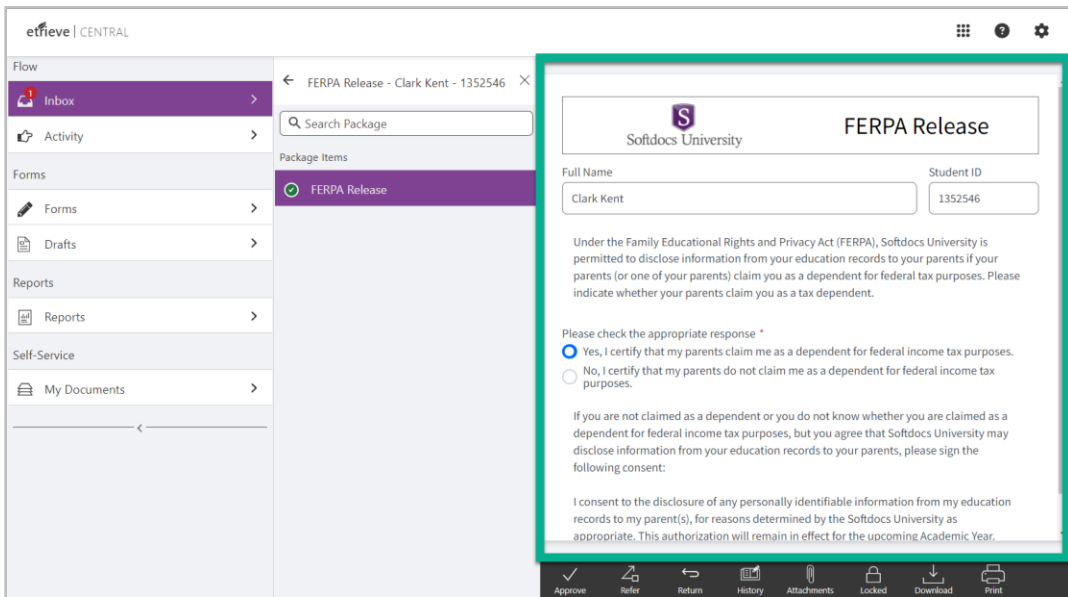


FIGURE 2.2 Etrieve Central Document Viewer

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.

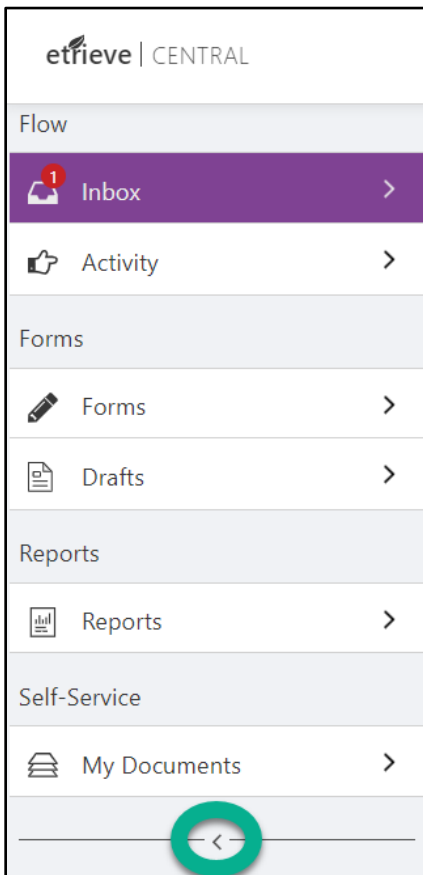


FIGURE 2.4 Collapse Primary Navigation Panel

2.2 The Header and Navigation

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

- ▶ Etrieve | Central (View Reset)
- ▶ App Switcher
- ▶ Resource Center (Question Mark) – Displays based on privileges.
- ▶ Settings Panel Toggle (Gear)

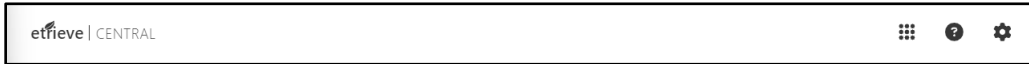


FIGURE 2.5 The Header

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

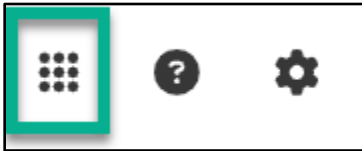


FIGURE 2.6 App Switcher

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



FIGURE 2.7 Etrieve | Central

MENU ACCESS | Clicking the gear menu icon on the right toggles on the Settings Panel.

The Settings Panel may be toggled off by clicking the gear.

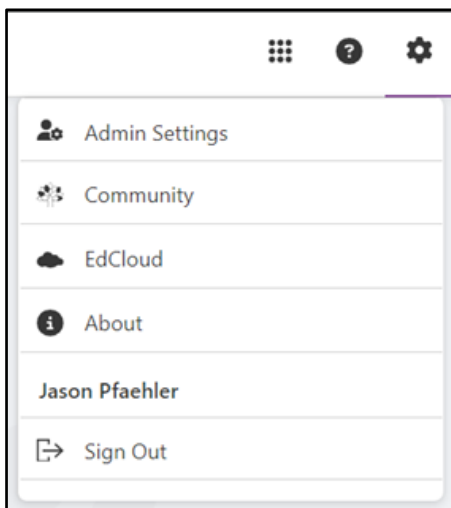


FIGURE 2.8 Etrieve | Central Settings Panel

ADMIN SETTINGS | The Admin Settings option will be visible to users with access to manage and configure Etrieve Workflows and Forms.

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

[EdCloud/GovCentral](#) | EdCloud/GovCentral provides a link to access EdCloud/GovCentral pages if licensed (Cloud Offering).

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

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 sign-out page. Select the 'Sign In' button to return to the Softdocs IAM sign-in page.

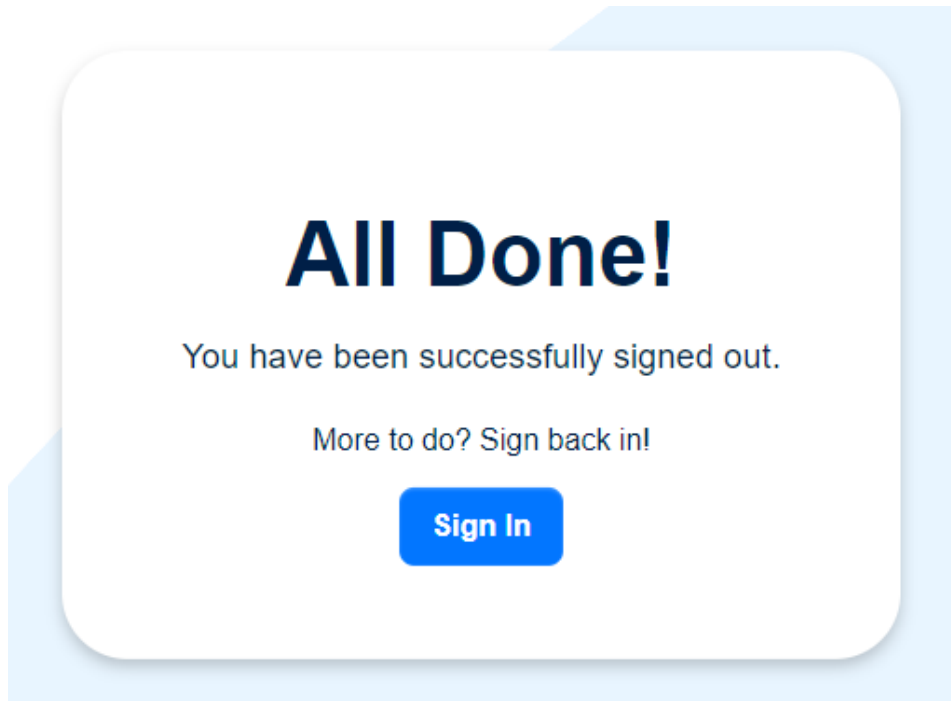


FIGURE 2.9 Sign-Out Page

2.3 The Document Viewer

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

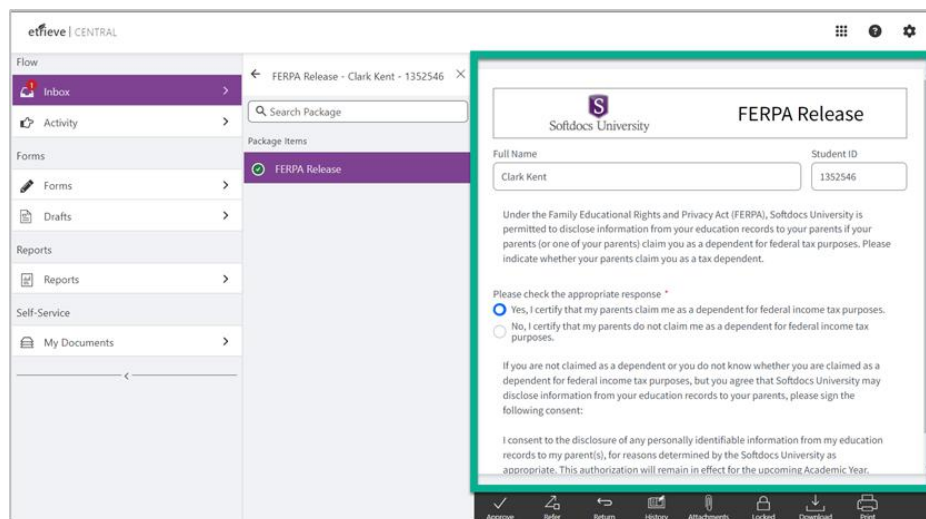


FIGURE 2.10 Etrieve Central Inbox – View Package Items and Associated Document

ATTACHMENTS | From the Document Viewer, users can upload attachments to a form while filling it out. The supported file types for attachments are limited to .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.

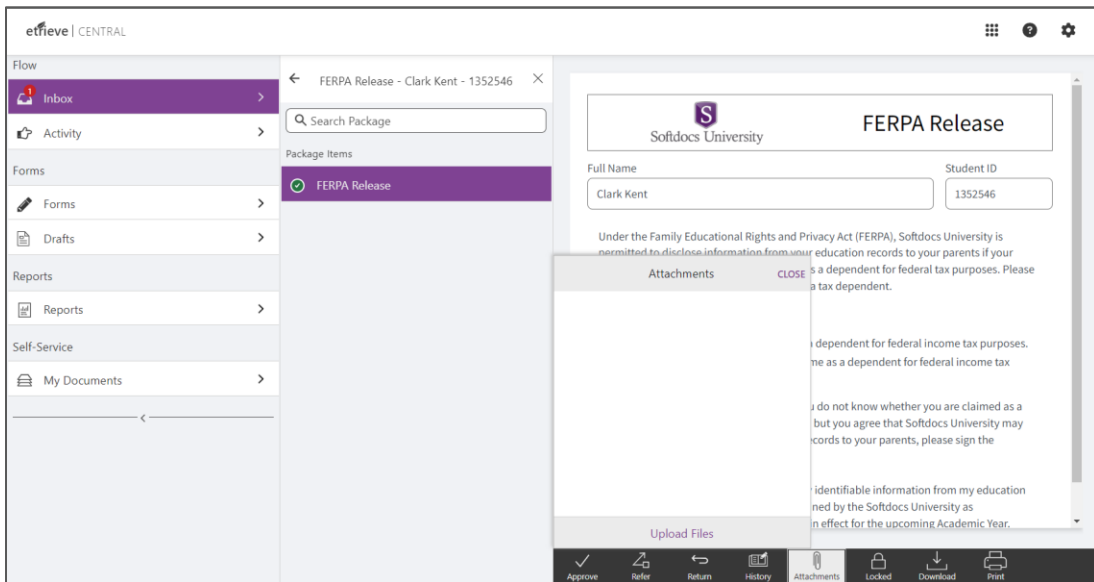


FIGURE 2.11 Etrieve Central Inbox – View Package Items and Form Attachments

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.

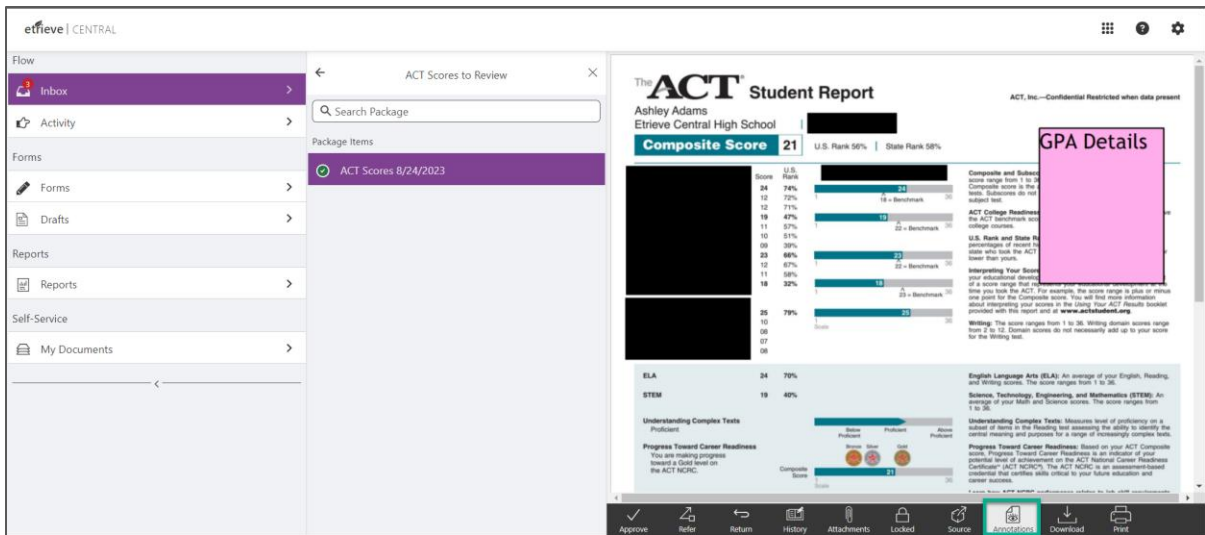


FIGURE 2.12 Etrieve Central Inbox - View Package Items and Associated Completed Form with Annotation

2.4 Focus Mode

Some institutions may benefit from the “Focus Mode” feature when sending links so employees can 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 providing 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:

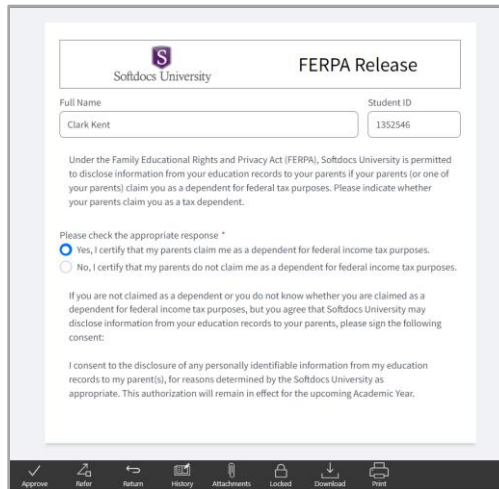
A screenshot of a web form titled "FERPA Release" from Softdocs University. The form is displayed in a focused view, meaning the top navigation header is hidden. It features two input fields: "Full Name" with the value "Clark Kent" and "Student ID" with the value "1352546". Below the fields is a paragraph of text explaining FERPA and a request for consent. There are two radio button options: "Yes, I certify that my parents claim me as a dependent for federal income tax purposes." (which is selected) and "No, I certify that my parents do not claim me as a dependent for federal income tax purposes." At the bottom, there is a consent statement. A dark action bar at the very bottom contains icons for Approve, Refer, Return, History, Attachments, Locked, Download, and Print.

FIGURE 2.13 Etrieve Central Forms Viewer without Header and in Focus Mode

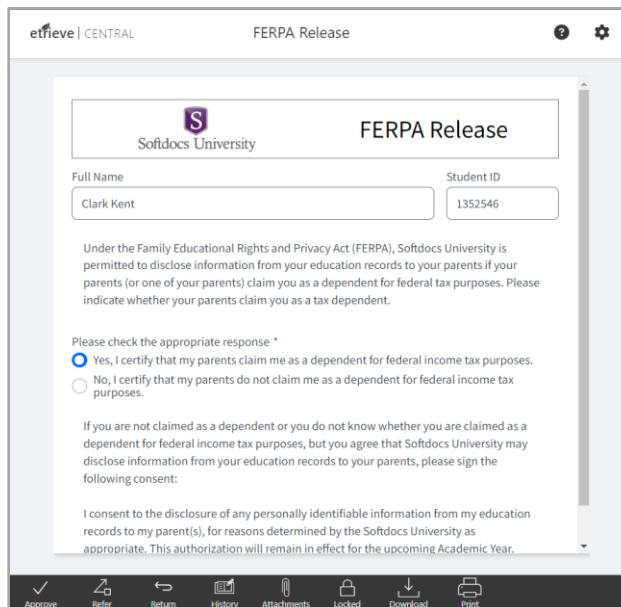
A screenshot of the same "FERPA Release" form, but this time it is shown with the Etrieve Central header. The header includes the "etrieve | CENTRAL" logo on the left and the form title "FERPA Release" on the right, along with help and settings icons. The form content is identical to the previous screenshot, including the name and ID fields, the consent text, and the radio button options. The same dark action bar with icons is visible at the bottom.

FIGURE 2.14 Etrieve Central Forms Viewer in Focus Mode (with header)

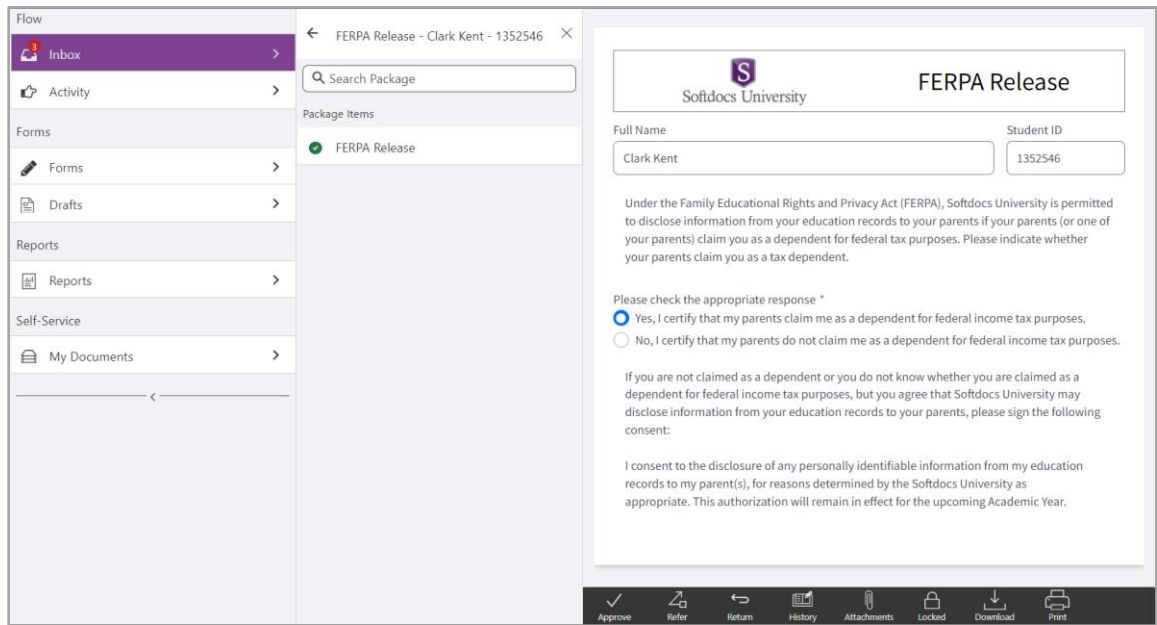


FIGURE 2.15 Etrieve Central Forms Viewer without header (no Focus Mode)

2.5 Anonymous Access

A form with “Anonymous Access” enabled will be available to users without an Etrieve login. This feature makes forms more widely accessible without creating 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 2.16.

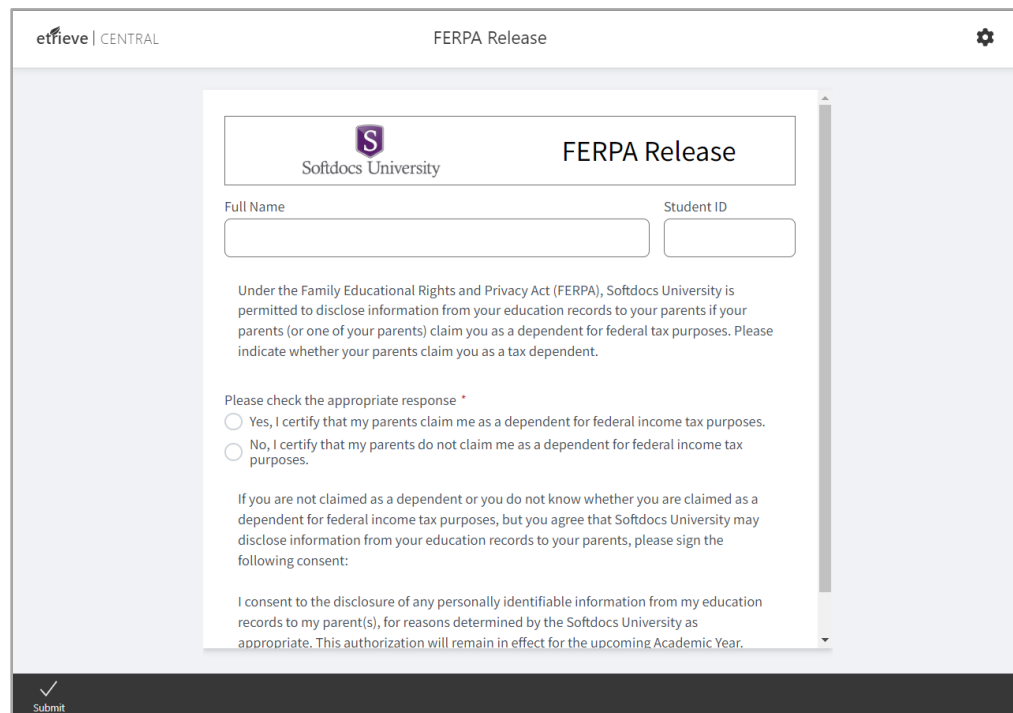


FIGURE 2.16 Etrieve Central Anonymous Access Form View for Users without Etrieve Login

3

Central Flow Management

3.1 Flow Inbox Panel

The Inbox panel maintains all document packages routed to the user via workflows. The most recent package will appear first (like an e-mail inbox). Packages arrive in the Inbox once the previous actor approves them in the workflow. The backend workflows are designed and implemented by Etrieve Central 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.

Any user in the recipient group/role can lock a package. A document in a locked package can only be edited, approved, referred to, etc., by the user who locked it. Viewing an unlocked package automatically locks it to that user.

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 search criteria after navigating away from the Inbox or Activity. If the user returns to Inbox or Activity, their search filter will remain.

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

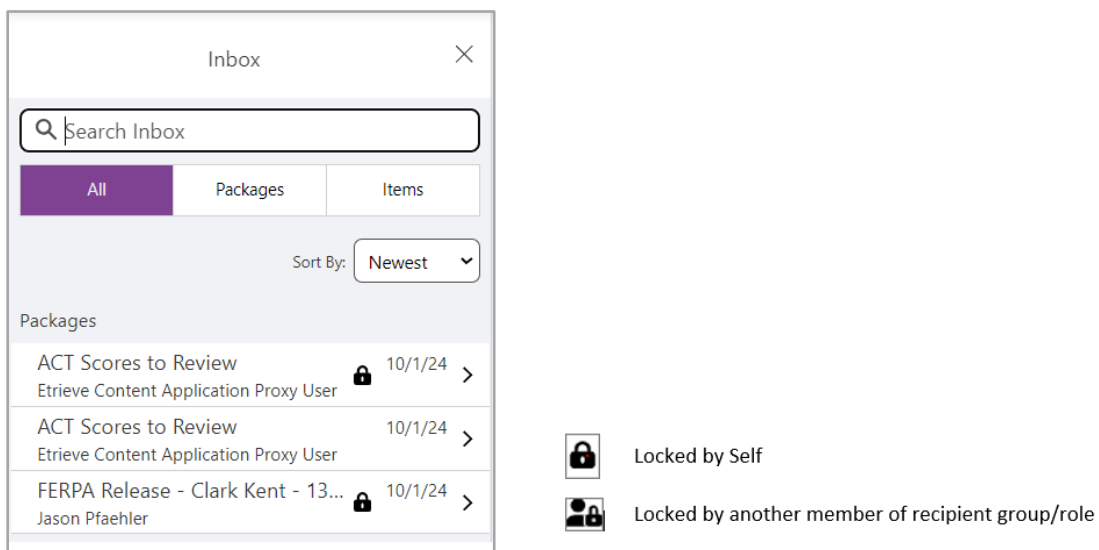


FIGURE 3.1 Flow Inbox

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

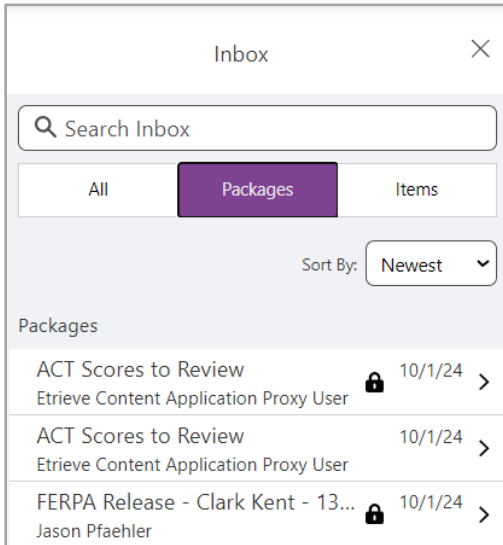


FIGURE 3.2 Flow Inbox Search Package

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

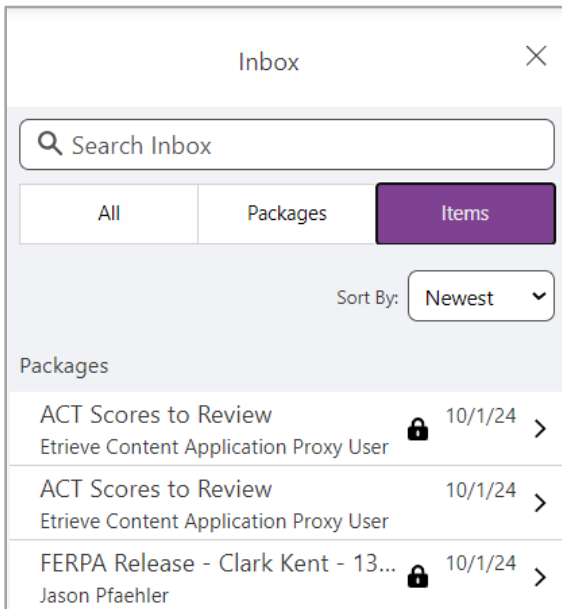


FIGURE 3.3 Flow Inbox Search Items

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

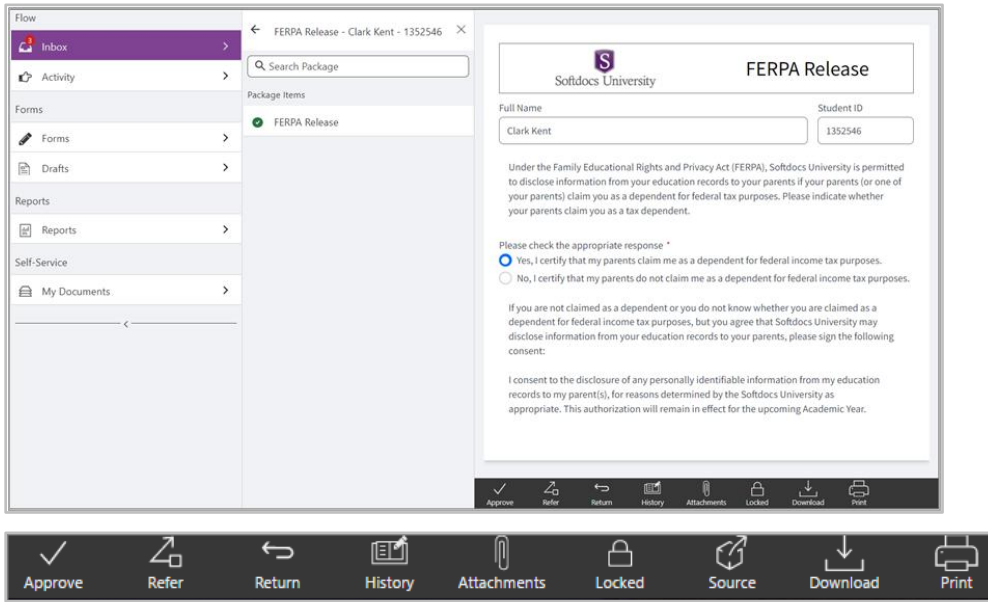


FIGURE 3.4 Flow Inbox Illustration of Action Buttons

APPROVE | The document is approved, allowing it to continue 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 who are no longer at the Institution. Approve may only be selected once to avoid erroneous approvals. The Administrator configures the list of available approvers in Security.

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

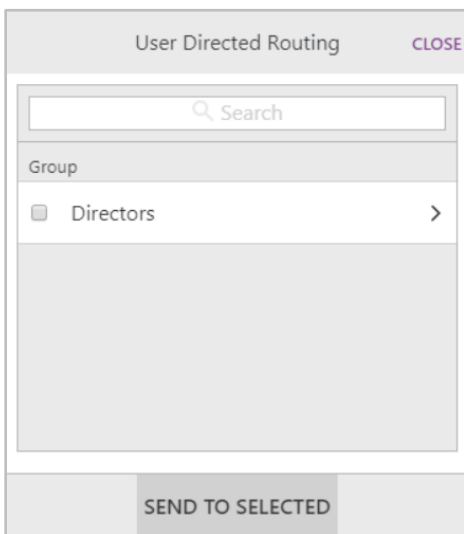


FIGURE 3.5 Select Group to Receive Form / Package

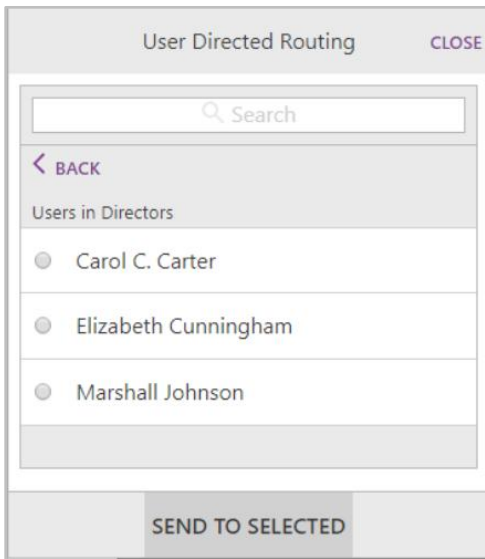


FIGURE 3.6 Select Individual Users to Receive Form / Package

DECLINE | The document is declined and sent through an alternate declined workflow.

NOTE | Depending on your institution’s workflow, the decline icon 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 by an administrator at a specific Actor Step in a workflow. 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 among users with the same name. As a name enters 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, the reviewer must complete the required fields before the package can be acted upon.

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

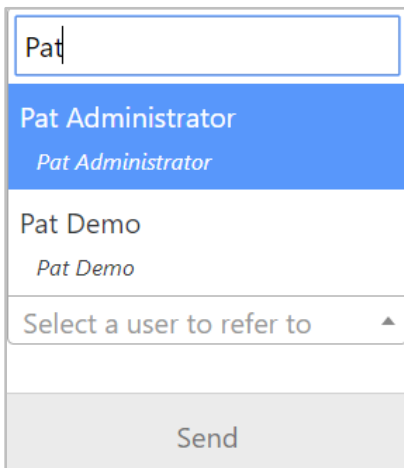


FIGURE 3.7 Refer Search Field

RETURN | This action 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 it 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 before an E-Sign step, they will be presented with the following data loss warning:

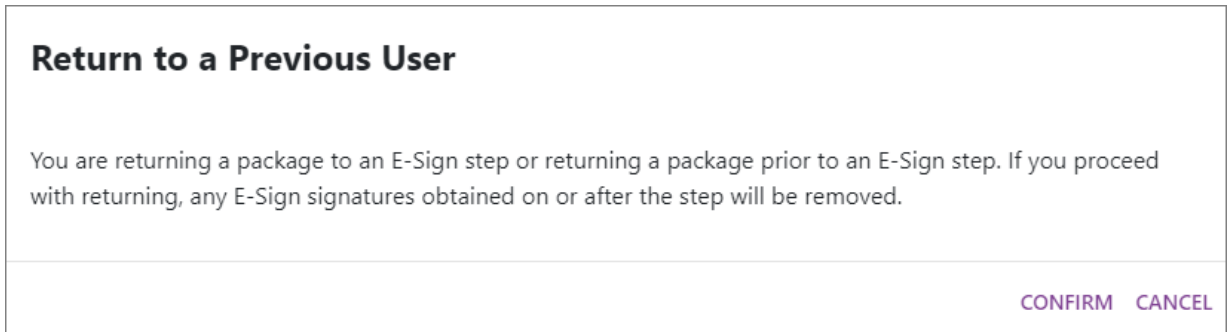


FIGURE 3.8 E-Sign Return to Previous Step Warning

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

NOTE | Required fields need not 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. If the Package Item is an e-form, 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 can 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.

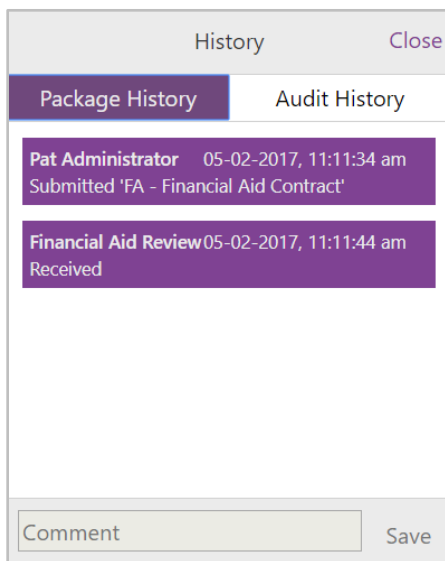


FIGURE 3.9 History | Package History

AUDIT HISTORY | (Classic Forms Only) View any changes or updates 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 changes were made. If a field on the Form was changed, the actual change made, date, time, and user ID are presented when the informational tag for that field is selected.

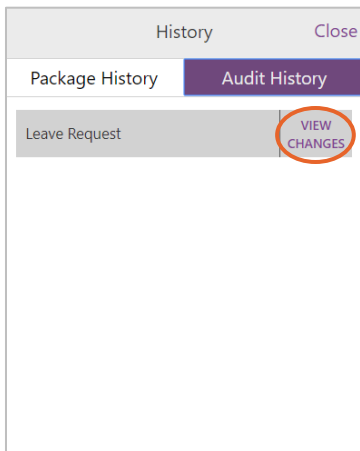


FIGURE 3.10 a Audit History

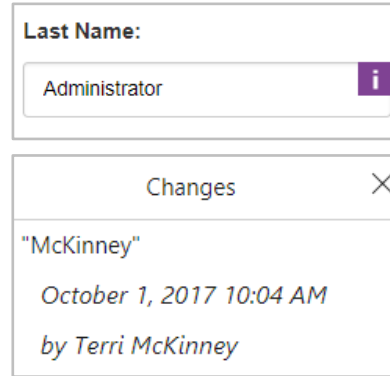


FIGURE 3.10 b Audit History | Changes Made

ATTACHMENTS | Users may upload file(s) to the Item currently displayed in the Viewer. Click on the icon, and a panel will appear 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. Users can select this icon to Edit, Delete, or View the Attachment. When View is selected, the file will be downloaded in native format.

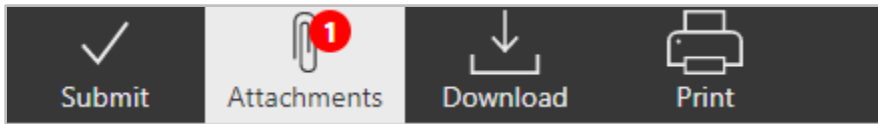


FIGURE 3.11 Attachments Icon

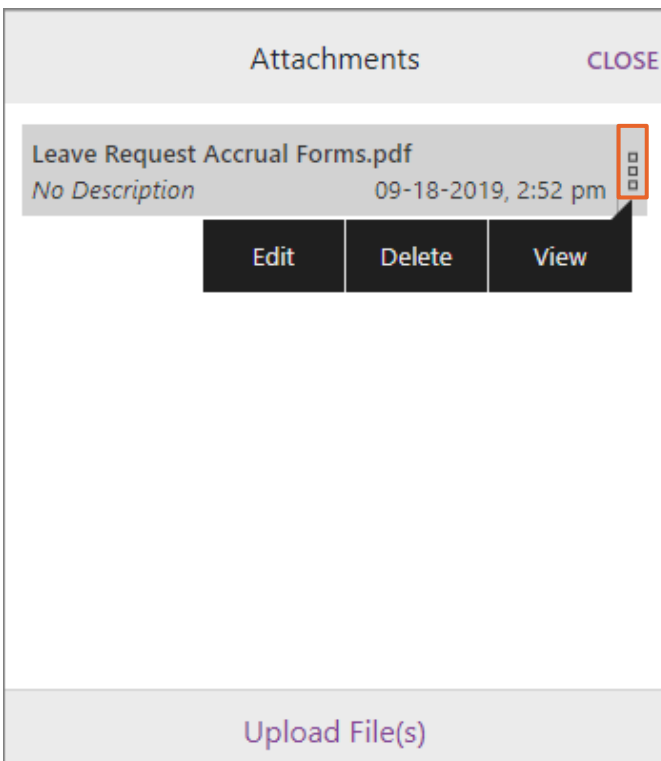


FIGURE 3.12 Attachments

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

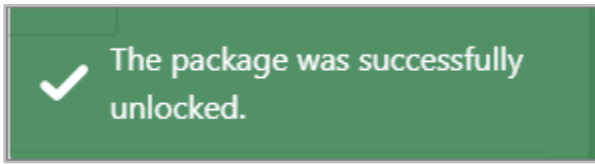


FIGURE 3.13 Locked Advisory

Other users can change and manipulate an unlocked document within the workflow.

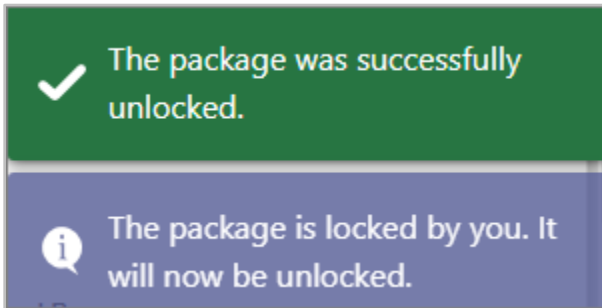


FIGURE 3.14 Unlocked Advisory

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 alert 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 with a link to the appropriate package needing a signature is sent to the email address identified at that step.

When external users click the E-Sign link in the email, they are presented with the form in focus mode.

If you do not wish to Electronically Sign you may choose to Opt Out, download the form to print and physically sign. If there is something wrong with the information on the form you may decline and leave a comment on the error. X

Employee Information

Legal First Name	Legal Middle Name (if applicable)	Legal Last Name
Preferred Name	Contact Phone	
	(999) 999-9999	

Equipment Preferences

Laptop	Mouse Preference	Keyboard Preference

Policies & Orientation

- I have reviewed key policies.
- I have reviewed general administrative policies.
- I have been given general introduction and orientation.
- Reference documents and guidelines have been shared with me.

Clear Signature

Submit
 Decline
 Opt Out
 Download
 Print

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

The E-Sign view includes a banner that overlays the top portion of the view, explicitly informing the user of their options if they do not want to E-Sign the form. The user can 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.

If you do not wish to Electronically Sign you may choose to Opt Out, download the form to print and physically sign. If there is something wrong with the information on the form you may decline and leave a comment on the error. X

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:

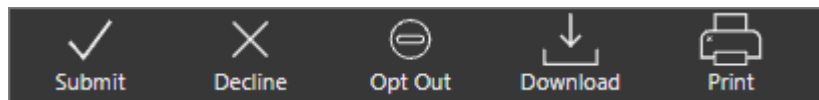
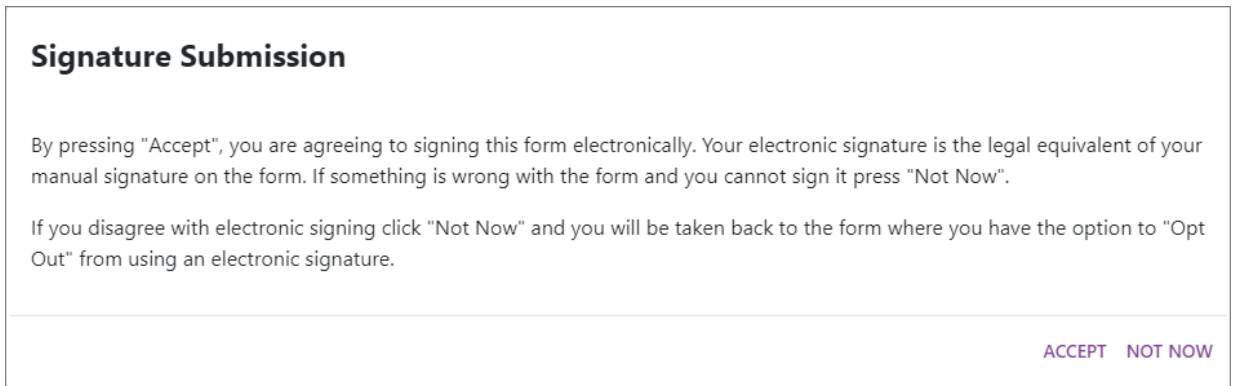


FIGURE 3.17 Etrieve Central E-Sign View Action Panel

SUBMIT | This button allows users to submit the E-Sign form package after they've filled out all the required signature fields on the form. Any field required but not 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, after clicking the Submit button, the user will be asked for consent to do business electronically. Choosing the 'Accept' option will submit the form with the user's electronic signature affixed. An email with a link to a read-only copy of the form is sent to the user, which they can refer to in the future. Choosing "Not Now" will take the user back to the E-Sign view of the form, where they can either edit the form fields and/or perform an action.



Signature Submission

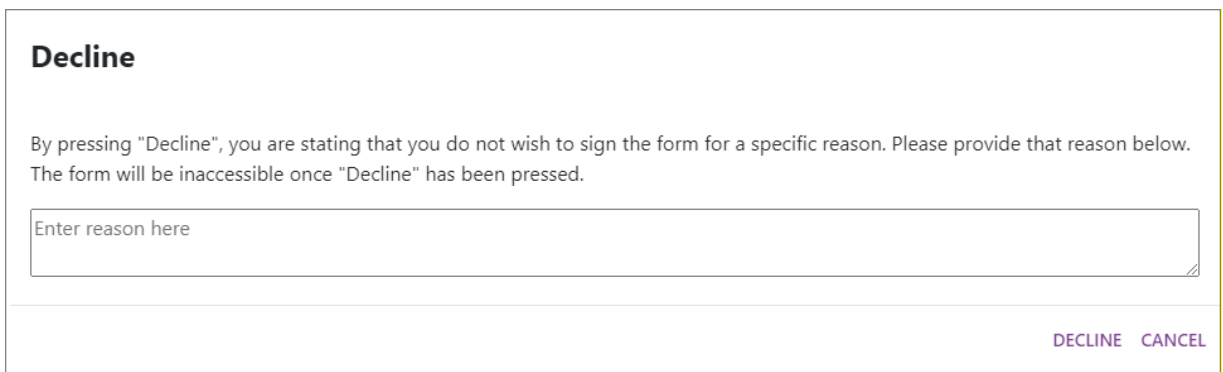
By pressing "Accept", you are agreeing to signing this form electronically. Your electronic signature is the legal equivalent of your manual signature on the form. If something is wrong with the form and you cannot sign it press "Not Now".

If you disagree with electronic signing click "Not Now" and you will be taken back to the form where you have the option to "Opt Out" from using an electronic signature.

[ACCEPT](#) [NOT NOW](#)

FIGURE 3.18 Confirmation of consent to do business electronically

DECLINE | The document is declined and sent 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.



Decline

By pressing "Decline", you are stating that you do not wish to sign the form for a specific reason. Please provide that reason below. The form will be inaccessible once "Decline" has been pressed.

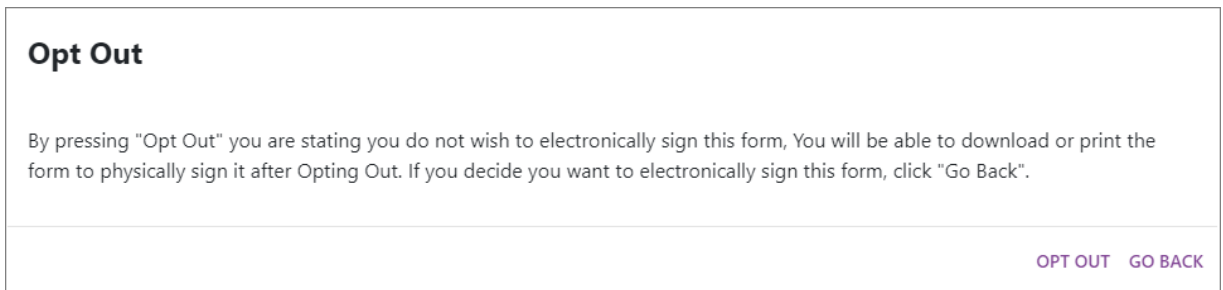
Enter reason here

[DECLINE](#) [CANCEL](#)

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 | This option allows the user to opt out of electronically signing a document. When choosing this option, the user is asked to confirm their selection and must provide a copy with a physical signature if a signature is required.



Opt Out

By pressing "Opt Out" you are stating you do not wish to electronically sign this form, You will be able to download or print the form to physically sign it after Opting Out. If you decide you want to electronically sign this form, click "Go Back".

[OPT OUT](#) [GO BACK](#)

FIGURE 3.20 E-Sign Opt Out Confirmation

If a user opts out and changes their mind later, they can refer 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 status of these packages and any related activities. No action can be taken regarding a package from this panel.

Like the Inbox Panel, user activity may be searched and filtered to limit results by all packages, specific packages, or 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.

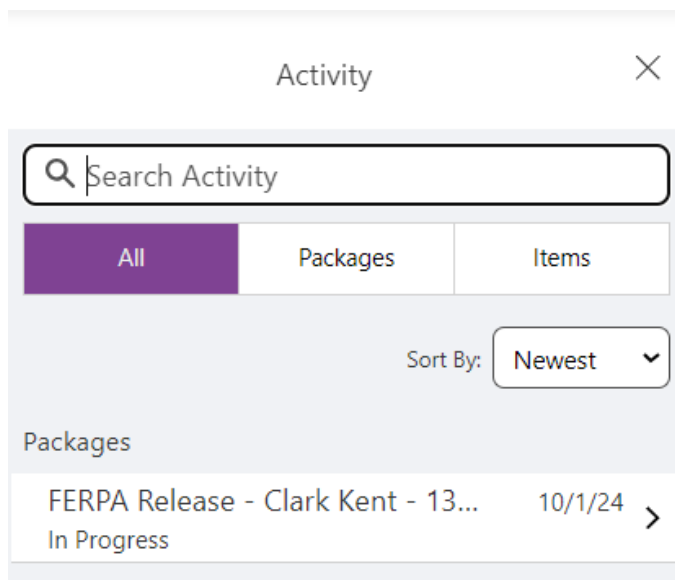


FIGURE 3.21 Flow Activity Search All Filtered by 'HR'

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

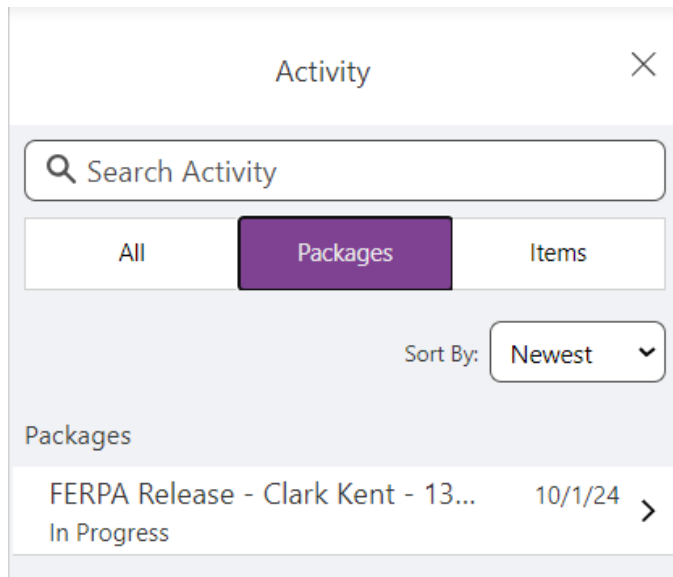


FIGURE 3.22 Flow Activity Search Package Filtered by 'Route'

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

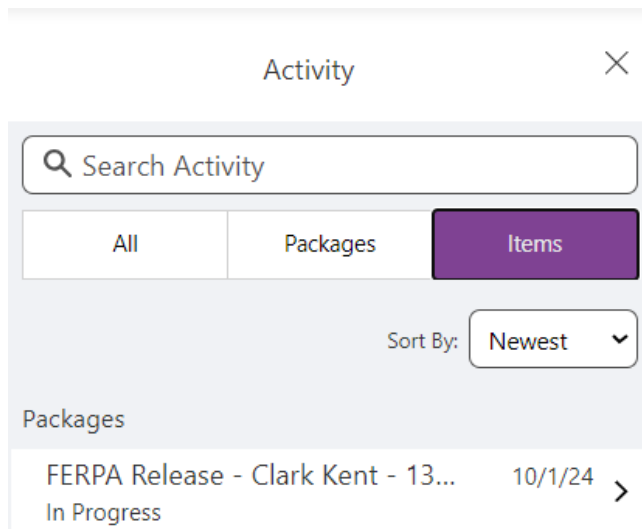


FIGURE 3.23 Flow Activity Search Items

The status of a Package will also be described in the Activity Panel. A Package can either be in Progress or 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 satisfied all activities.

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. If the Package Item is an e-form, 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 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 can add general comments regarding package actions. Click 'Save' to preserve any comments made.

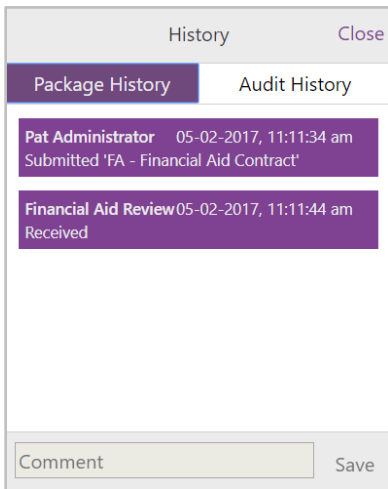


FIGURE 3.24 History | Package History

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 changes were made. If a field on the Form was changed, the actual change made, date, time, and user ID are presented when the informational tag for that field is selected.

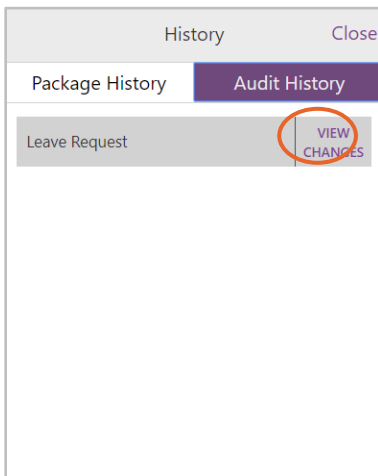


FIGURE 3.25 a Audit History Page

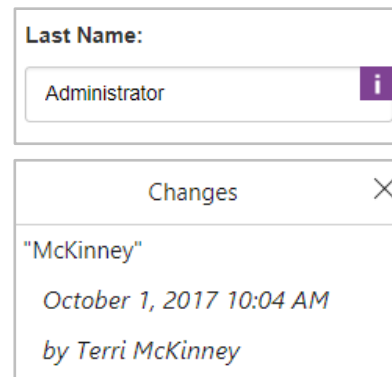


FIGURE 3.25 b Audit History | Changes Made Page

ATTACHMENTS | Users may upload file(s) to the Item currently displayed in the Viewer. Click on the icon, and a panel will appear where the user can select and upload files. 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. Users can select this icon to Edit, Delete, or View the Attachment. When View is selected, the file will be downloaded in its native format.

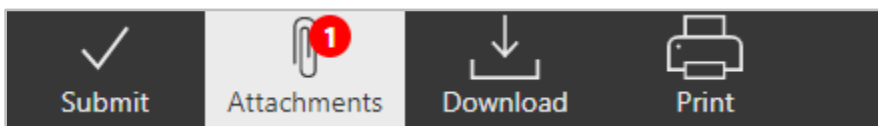


FIGURE 3.26 Attachments Icon

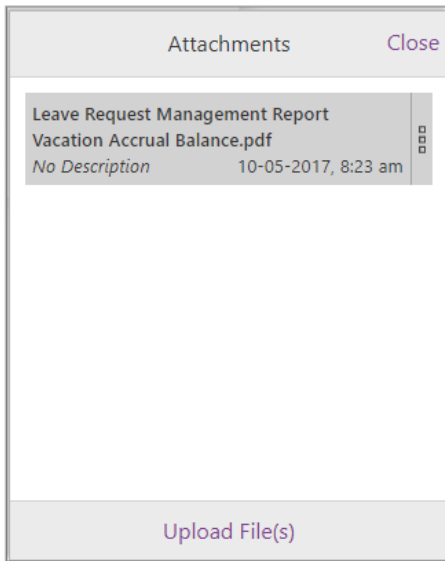


FIGURE 3.27 Attachments

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 alert 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.

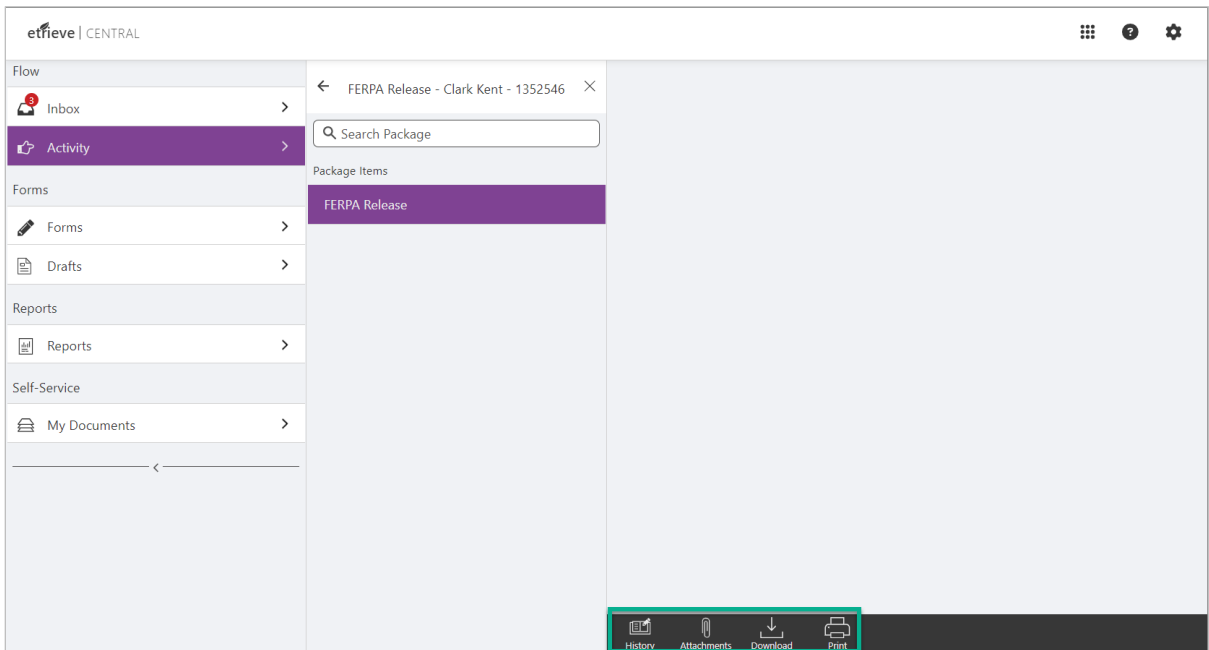


FIGURE 3.28 Flow Activity Actions

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.

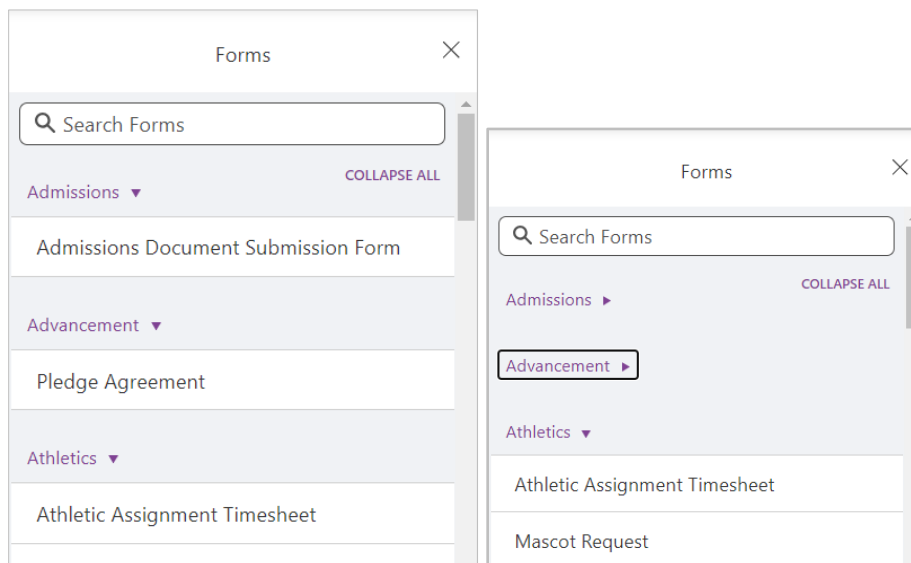


FIGURE 4.1 a Available Forms for Multiple Forms Groups FIGURE 4.1 b Hidden Forms Groups

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 becomes available. This feature operates identically here and in Flow. The Administrator configures the available list in Security. Forms can only be transmitted to the applicable configured users.

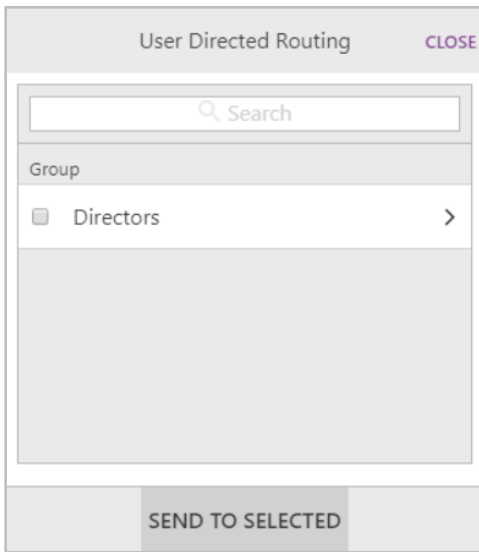


FIGURE 4.2 a Select the Group to View

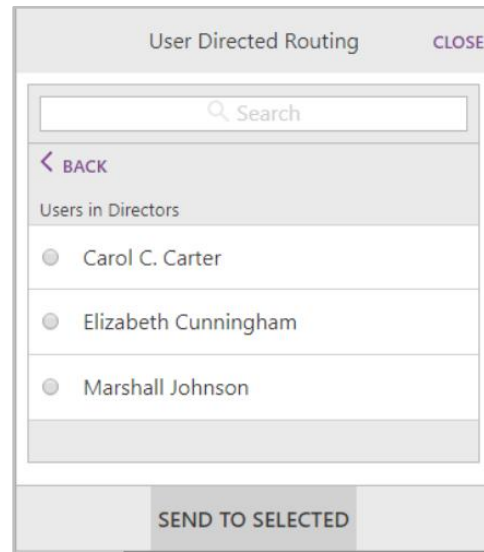


FIGURE 4.2 b Select Users to Receive Form / Package

When a user clicks the Submit button, a spinner icon will display to indicate that 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.

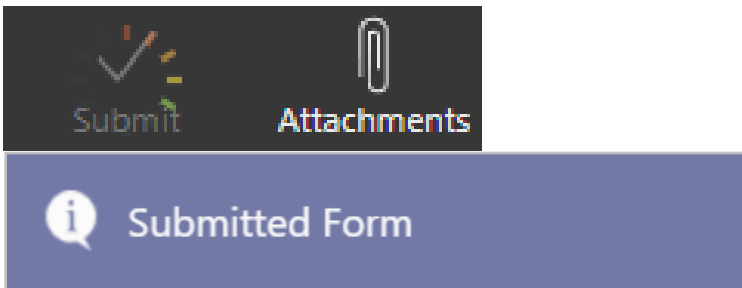


FIGURE 4.3 Submitted Form Confirmation

ATTACHMENTS | Users may upload file(s) to the Item currently displayed in the Viewer. Click on the icon, and a panel will appear where the user can select and upload files. 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. Users can select this icon to Edit, Delete, or View the Attachment. When View is selected, the file will be downloaded in native format.

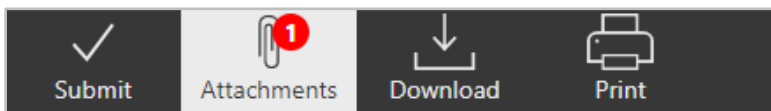


FIGURE 4.4 Attachments Icon

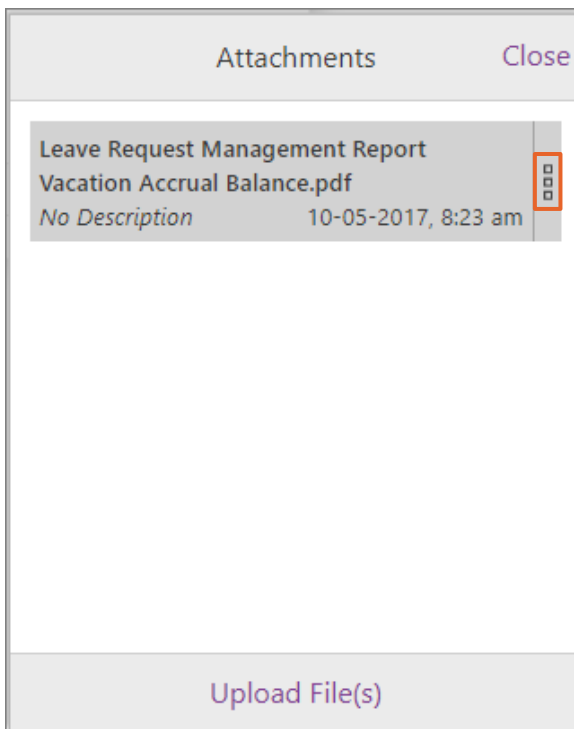


FIGURE 4.5 Attachments (Edit, Delete, or View)

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 are preserved in the downloaded copy.

Forms commonly used to manage contracts and policy changes 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, eliminating irrelevant users and data 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 compile a list of Etrieve Users to whom a form may be sent. The 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** | Select every user in the provided list.
- ▶ **Deselect All** | Unchecks every user checked; allows the Central User to choose specific Etrieve Users to receive the form by clicking the Display Name.
- ▶ **Filters** | Filters may be used to narrow the initial scope of Etrieve Users who 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) next to the filter name.

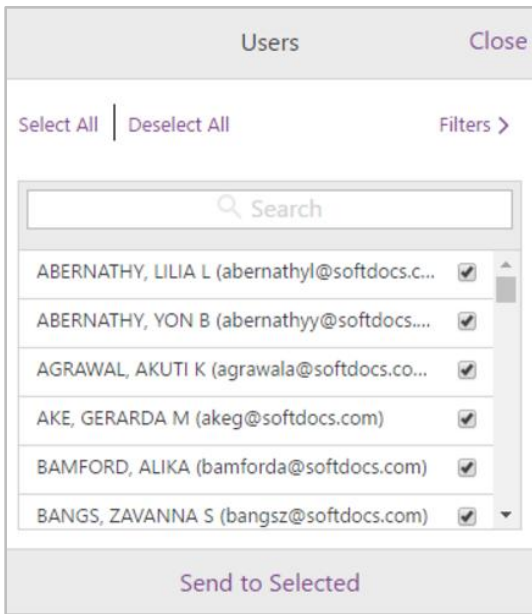


FIGURE 4.6 a Forms Panel | Broadcast Icon

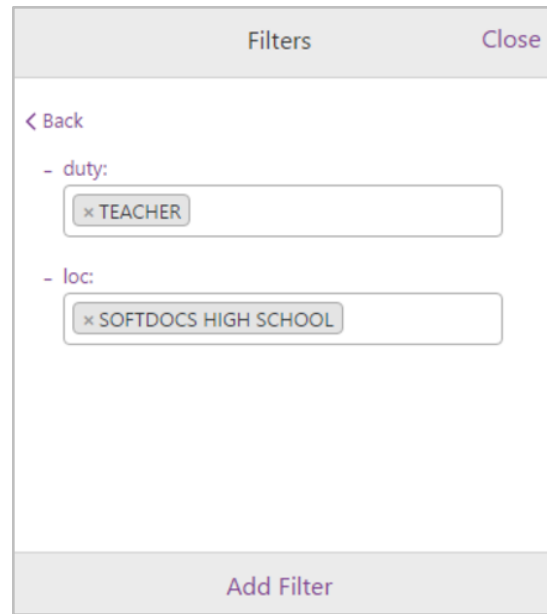


FIGURE 4.6 b Forms Panel | Broadcast Icon | Filters

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

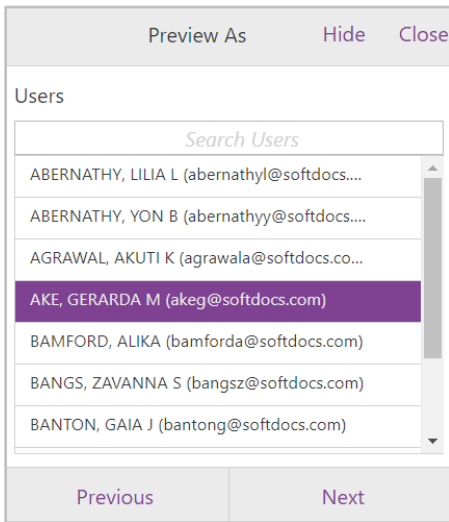


FIGURE 4.7 a Forms Panel | Preview Icon Full Page Engaged

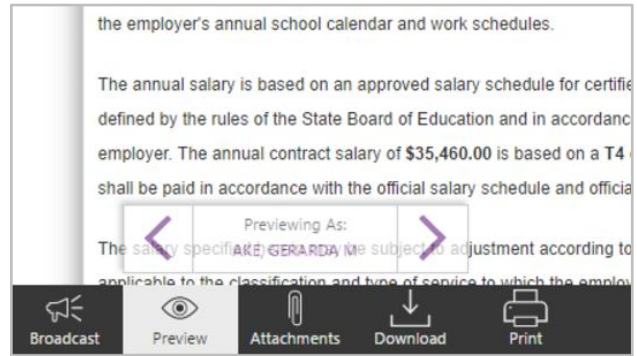


FIGURE 4.7 b Forms Panel | Preview Icon | Hide

ATTACHMENTS | Users may upload file(s) to the Item currently displayed in the Viewer. Click on the icon, and a panel will appear where the user can select and upload files. 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. Users can select this icon to Edit, Delete, or View the Attachment. When View is selected, the file will be downloaded in native format.

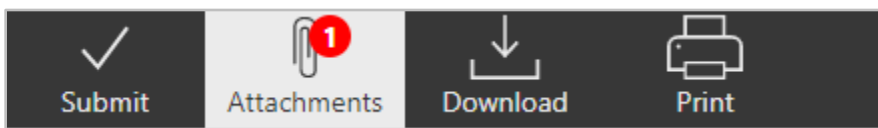


FIGURE 4.8 Attachments Icon

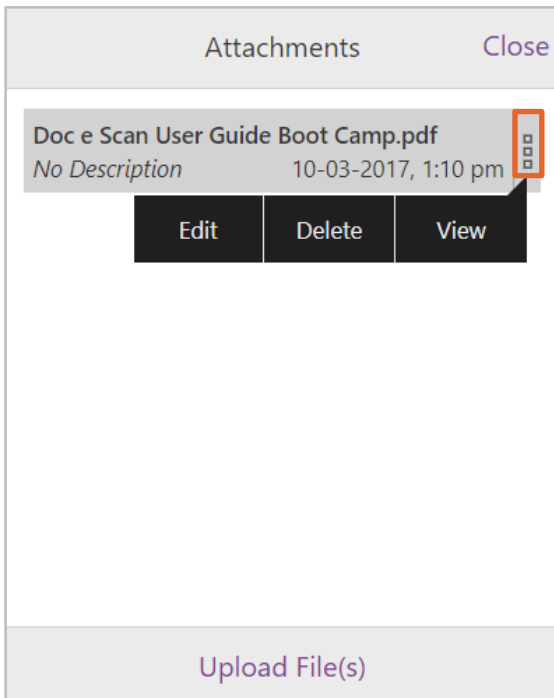


FIGURE 4.9 Attachment Options (Edit, Delete, or View)

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.

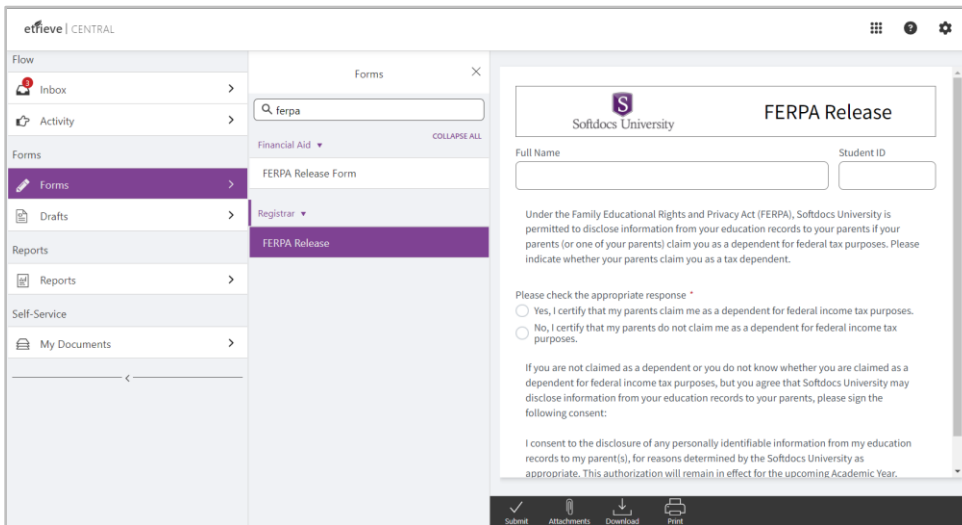


FIGURE 4.10 Forms User Has Permission to Edit/Submit

4.2 Drafts Panel

The Drafts Panel acts as a location for all incomplete forms. A user can manage, complete, or delete forms in a 'work-in-progress.' The **'Edit'** feature is 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 required but not 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 becomes available. This feature operates identically here and in Flow. The available list is configured by the Administrator as Security. Forms can only be transmitted to applicable configured users.

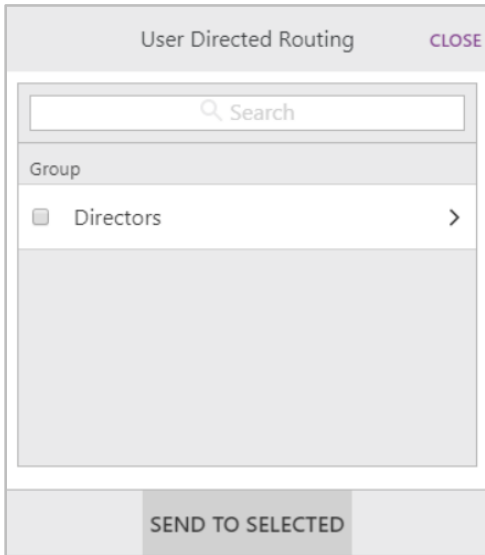


FIGURE 4.11 a Select Group to View

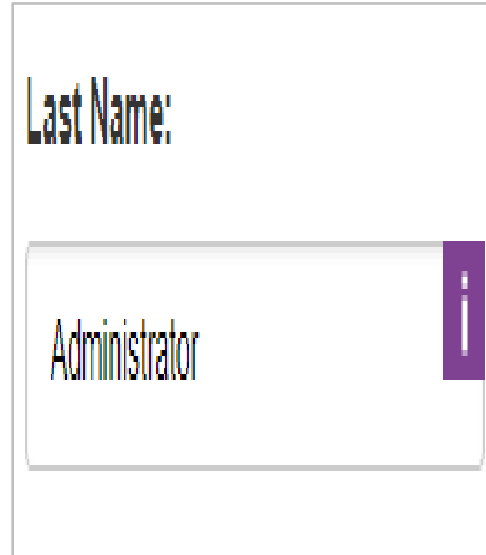


FIGURE 4.11 b Select Users to Receive Form / Package

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

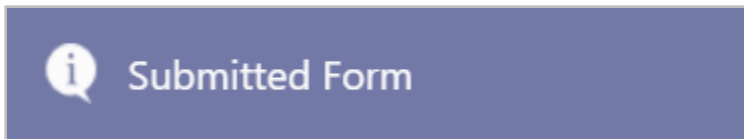


FIGURE 4.12 Submitted Form Confirmation

ATTACHMENTS | Users may upload file(s) to the Item currently displayed in the Viewer. Click on the icon, and a panel will appear where the user can select and upload files. 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. Users can select this icon to Edit, Delete, or View the Attachment. When View is selected, the file will be downloaded in native format.

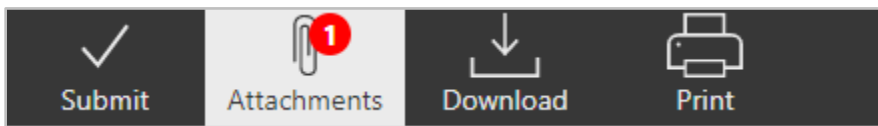


FIGURE 4.13 Attachments Icon

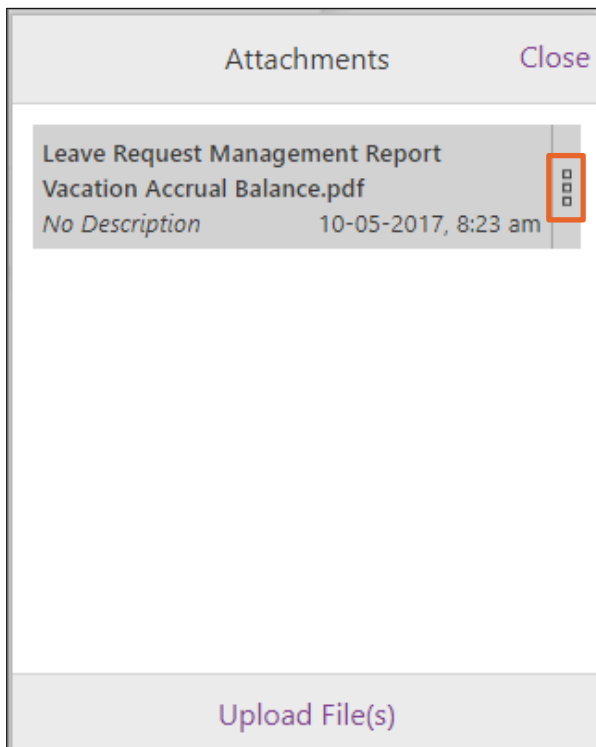


FIGURE 4.14 Attachments

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.

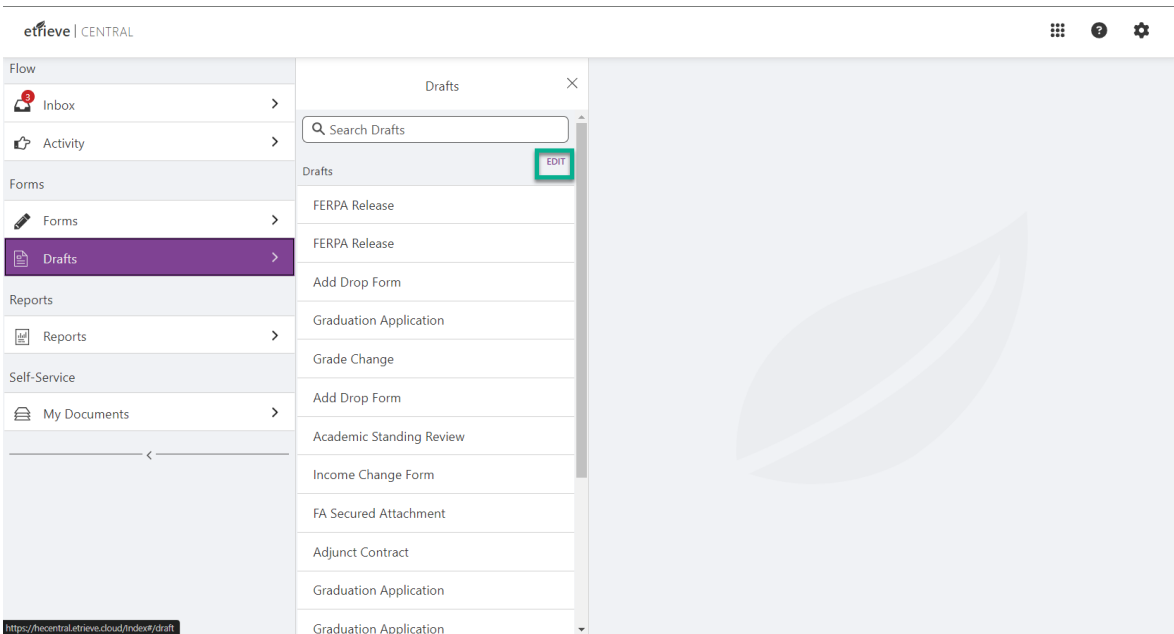


FIGURE 4.15 Drafts of Partially Completed Forms with Edit Option

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 provide a library of standard reports that have been built out of requirements and feedback provided by Etrieve customers. These reports are available as raw grids of data designed to provide a better understanding of the content within Etrieve. A Central user with permission to view reports has access to the report from Central. Every user will see only the reports they have permission to view. Reports can be shared with Etrieve and non-Etrieve users only if they can view them.

5.2 Accessing Reports

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

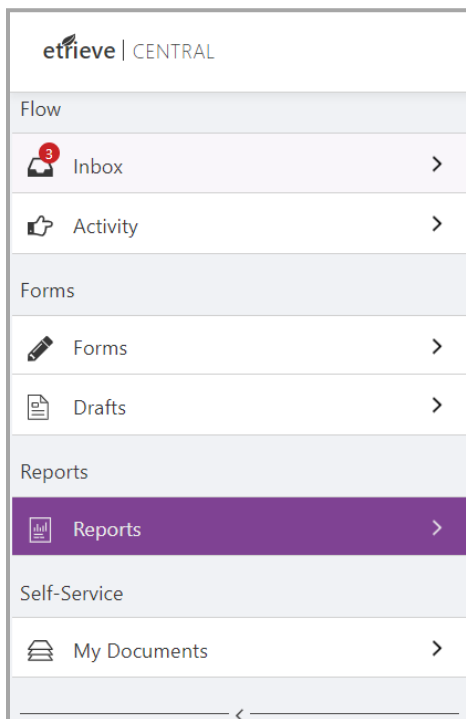


FIGURE 5.1 Reports in Central

The ' My Reports ' panel, located in the center of the page, displays a list of the reports available to the user. Reports are grouped into pre-defined categories.

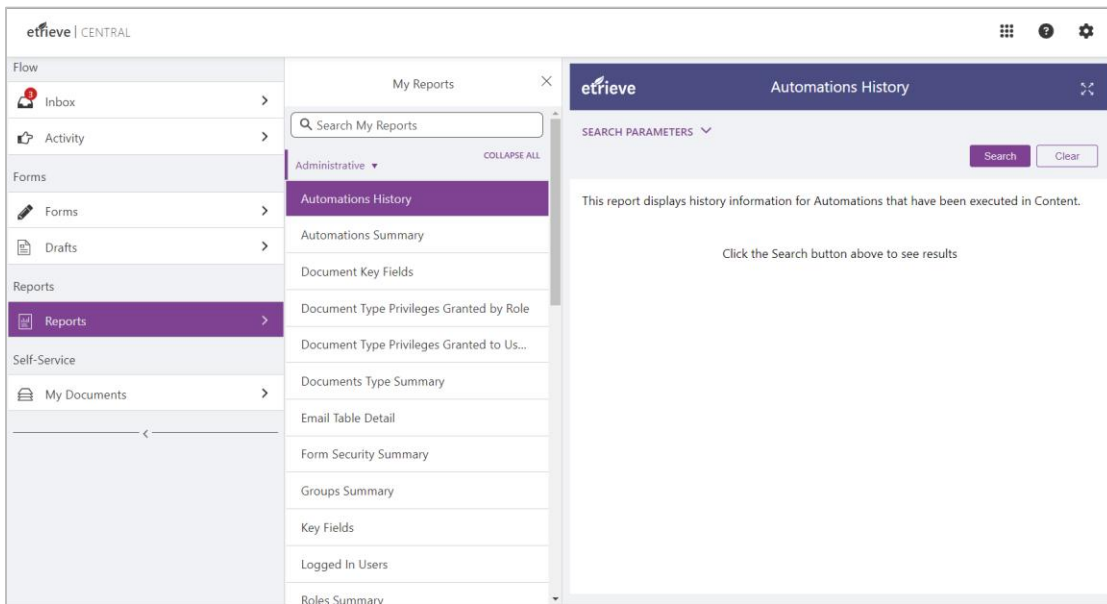


FIGURE 5.2 My Reports Panel

Clicking on the categories collapses or expands 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.

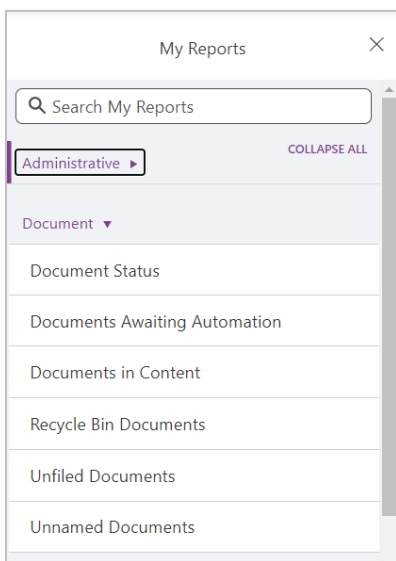


FIGURE 5.3 Collapsible Categories

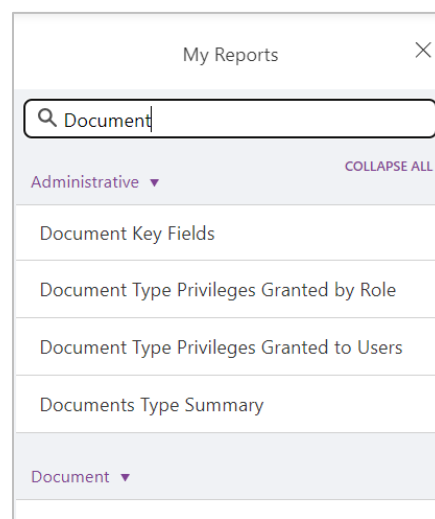


FIGURE 5.4 Search Field for Reports

5.3 Anatomy of a Report

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

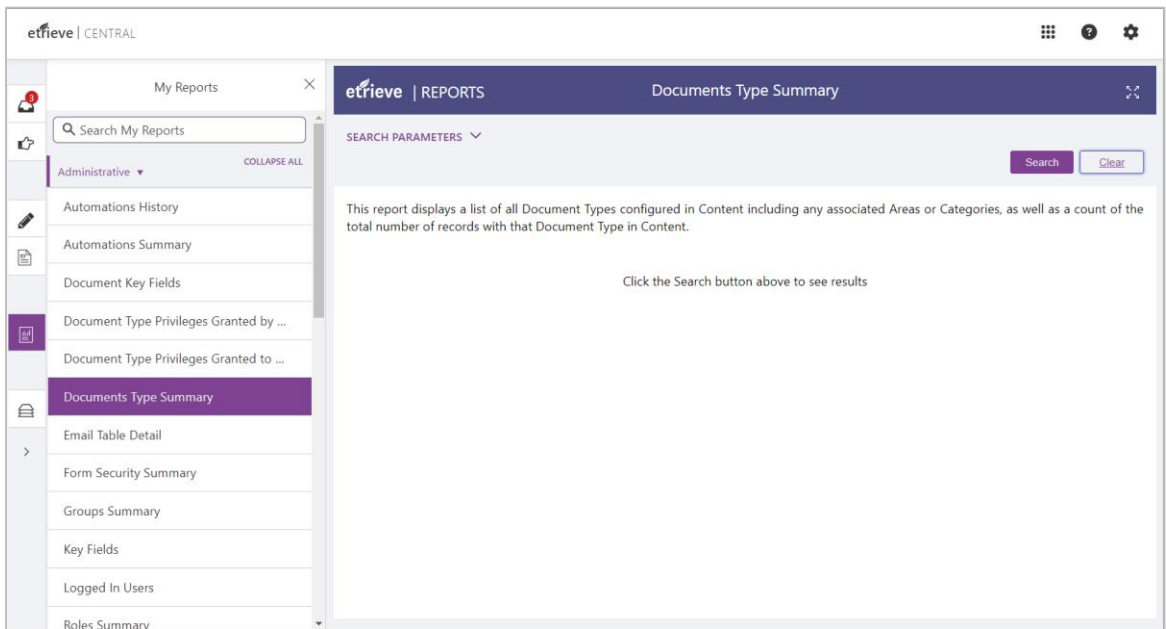


FIGURE 5.5 Reports in Central

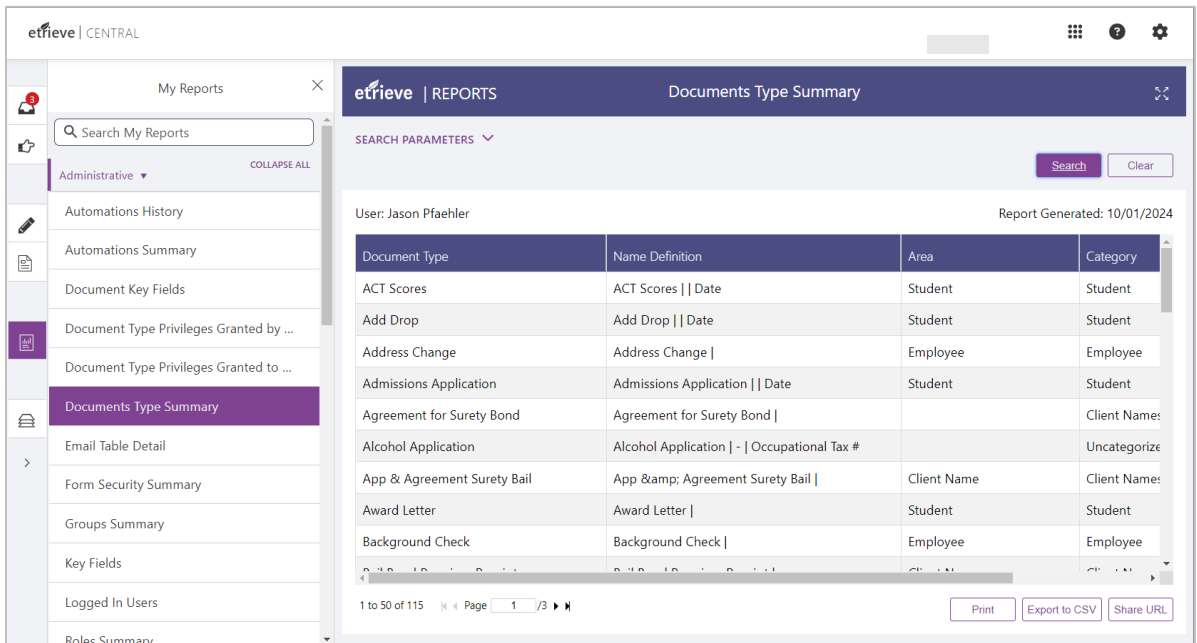


FIGURE 5.6 Displayed Report

Each report is composed of the same parameters. Please review the below to understand the best practices for adjusting search terms and consolidating reports.

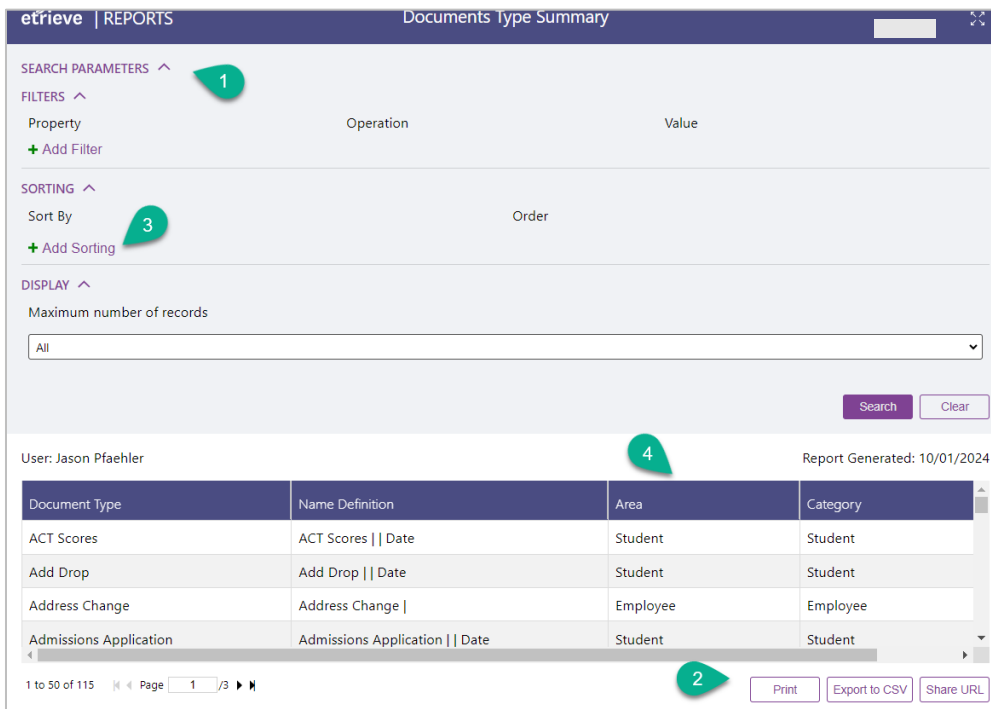


FIGURE 5.7 Etrieve Reports Sections

1 HEADER | The Search Parameters and the report's name are 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.

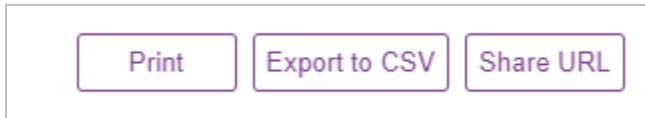


FIGURE 5.8 Menu Bar

PRINT | The Print button can print the currently displayed report.

EXPORT to CSV | Users can export a report to a CSV file.

SHARE URL | Shares the Report URL to a user who can view the report.

3 SORTING RECORDS | This setting controls the columns used to sort the data in the report.

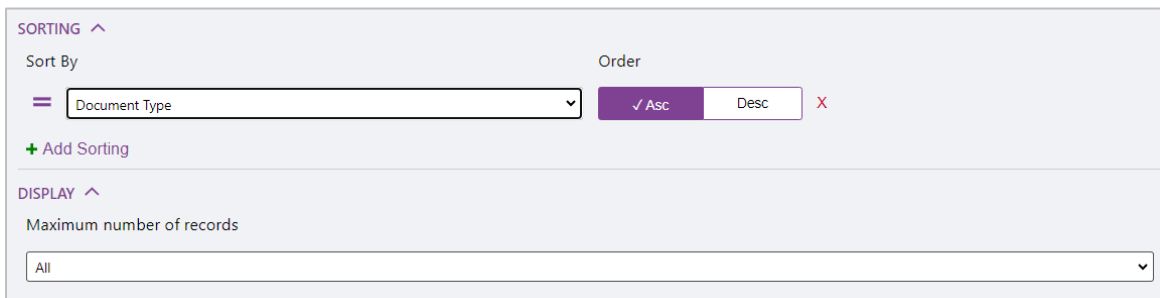


FIGURE 5.9 Sorting Records

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

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

The screenshot shows a 'FILTERS' panel with a table structure. The columns are 'Property', 'Operation', and 'Value'. The 'Property' column has a dropdown menu with 'Document Type' selected. The 'Operation' column has a dropdown menu with 'Equals' selected. The 'Value' column has a text input field containing 'ACT Scores' with a small 'x' icon to its right. Below the table is a '+ Add Filter' button.

FIGURE 5.10 Filters

4 REPORT | The main area of Etrieve Reports contains the report's results in a grid format. Reports have various columns displaying the information. Columns can be expanded or shrunk by clicking & dragging the column splitter. 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 cannot view any items for which they do not have the necessary security permissions.

Document Type	Name Definition	Area	Category
ACT Scores	ACT Scores Date	Student	Student
Add Drop	Add Drop Date	Student	Student
Address Change	Address Change	Employee	Employee
Admissions Application	Admissions Application Date	Student	Student

1 to 50 of 115 Page 1 / 3

Print Export to CSV Share URL

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 and the total number of pages will be shown here. Users can specify a page number to jump to or navigate to the last page by clicking the rightmost arrow.

The screenshot shows a page control bar with the text '1 to 50 of 468' followed by navigation arrows and '1 / 10'.

FIGURE 5.12 Report Grid Page Controls

5.4 Filters

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

This is a duplicate of Figure 5.10, showing the 'FILTERS' panel with 'Document Type' set to 'Equals' and the value 'ACT Scores'.

FIGURE 5.13 Filter Values Example

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

Multiple filters can be used at a time.

NOTE | Filters are applied consecutively, from top to bottom.

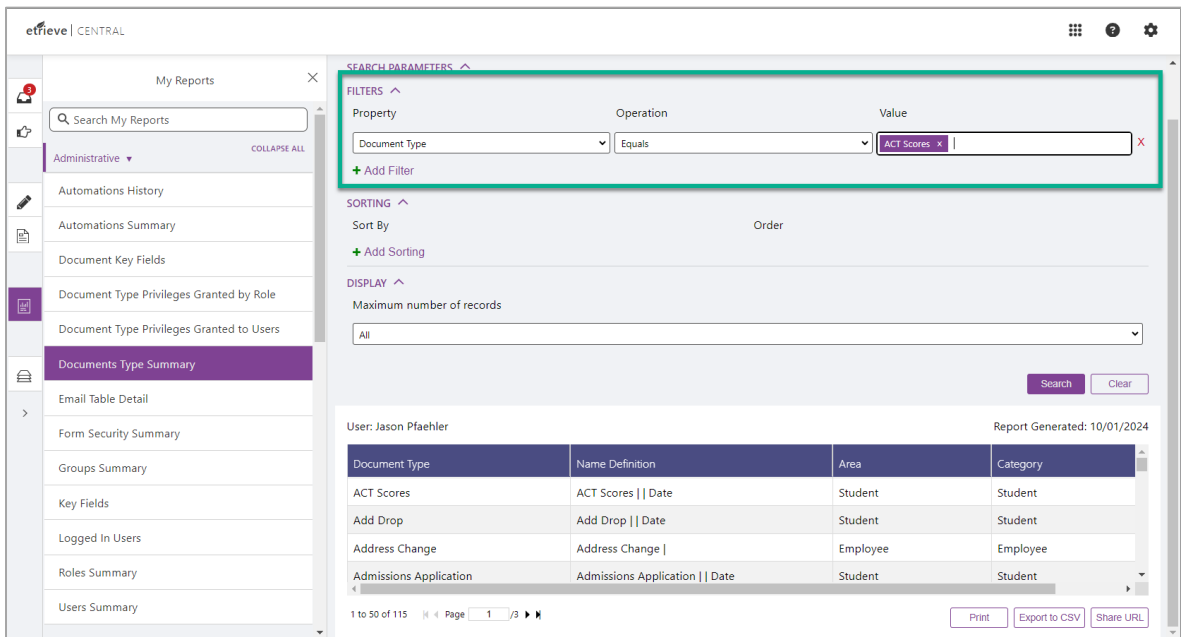


FIGURE 5.14 Multiple Filters

Users can increase page space if filters are unnecessary by clicking the arrow next to Search Parameters to collapse the panel.

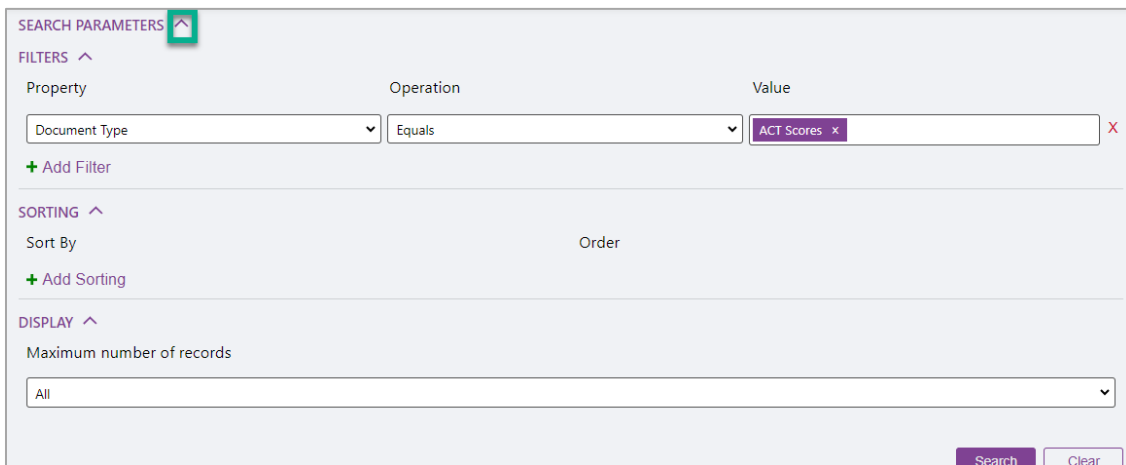


FIGURE 5.15 Collapse Arrow

5.5 Sub-reports

Some reports feature a sub-report component. Sub-reports include links to more detailed information, shown separately from the parent report. Here is a sample of a main report, which includes sub-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	Data Type	Field Rule	Document Detail	Lookup Detail	Key Field Type
Academic Year (YYYY)	Text	Text Pattern			Lookup
Academic Year (YYYY)	Text	Value Suggestions			Lookup
Acquisition Date	Date		Yes		Document
Aid Year	Text		Yes		Document
Amount	Money		Yes		Document
Any Date	Date				System
Any Decimal	Decimal				System
Any Money	Money				System
Any Number	Number				System
Any Text	Text				System
AP Status	Text	Constraint List	Yes		Document
AP Status	Text	Value Suggestions	Yes		Document

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 close icon at the top right corner of the sub-report.

Document Type	Area	Key Field Position
AN Doc Type 1	AN Test Area	1
AN Doc Type 2	AN Test Area	1

FIGURE 5.17 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.

2/3/22, 3:23 PM Etrieve Reports

etrieve | REPORTS Key Fields

User: Gilda Villasenor Report Generated: 02/03/2022

This report lists details for all Key Fields defined in Content. Clicking the Key Field link will open the configuration page for that Key Field in Content. If the Document Detail link displays a Yes, clicking on that link will display information for all of the Document Types that make use of the Key Field. If the Lookup Detail link displays a Yes, clicking that link will display detailed information for that Lookup Field.

Key Field	Data Type	Field Rule	Document Detail	Lookup Detail	Key Field Type
AutoTest060d7hm	Text	Value Suggestions			Lookup
AutoTest0arawou	Text	Value Suggestions			Lookup
AutoTest060d8by	Text	Constraint List			Lookup
AutoTest060d8by	Text	Value Suggestions			Lookup
AutoTest1kco9bz	Text	Value Suggestions			Lookup
AutoTest2br8yyb	Text	Value Suggestions			Lookup
AutoTest340k1d	Text	Value Suggestions			Lookup
AutoTest477lobj	Text	Value Suggestions			Lookup
IBI Alternate ID	Text	Value Suggestions			Lookup
IBI Date of Birth	Date				Lookup
IBI First Name	Text	Value Suggestions			Lookup
IBI ID Number	Text	Value Suggestions			Lookup
IBI Last Name	Text	Value Suggestions			Lookup
IBI Middle Name	Text	Value Suggestions			Lookup
IBI Student Information	Lookup			Yes	Lookup
AB - Test Field	Text	Constraint List	Yes		Document
AB Student	Lookup		Yes	Yes	Document
AB Student ID	Text	Value Suggestions			Lookup
AB Student Name	Text	Value Suggestions			Lookup
AB Student Status	Text	Value Suggestions	Yes		Document
Akrs14 KE	Date				Lookup
Aks	Decimal				Lookup
AN KeyField	Lookup		Yes	Yes	Document
AN KeyField00b7gqj	Number				Lookup

https://mbcentral.etrieve.cloud/#reports/key_fields/reports 1/17

Print 17 pages

Destination Save as PDF

Pages All

Layout Portrait

More settings v

[Save](#) [Cancel](#)

FIGURE 5.18 Print Options

Reports can also be exported and shared with users outside of Etrieve. The Export to CSV option is at the bottom of the active report. The report's data will be downloaded as a CSV file.

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, pay stubs, tax forms, etc. Privileges for Self-Service are assigned and maintained for access within Etrieve Security and Etrieve Content Configuration during system implementation.

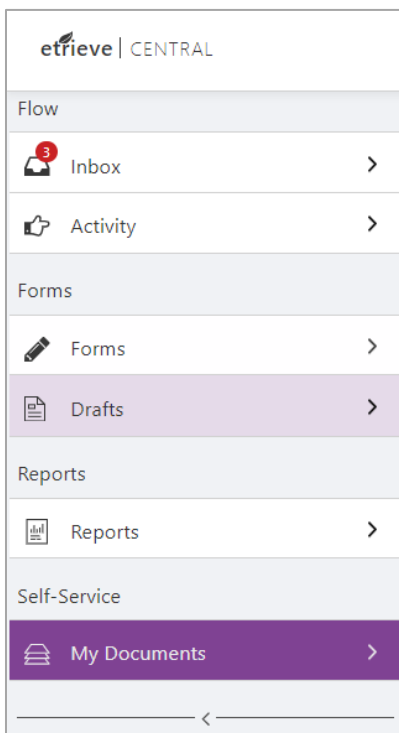


FIGURE 6.1 Self-Service

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 information on the document history will be appended to the end of the PDF file.

PRINT | Print the current document.

The screenshot shows the 'etrieve | CENTRAL' interface. On the left is a sidebar with categories: Flow (Inbox, Activity), Forms (Forms, Drafts), Reports (Reports), and Self-Service (My Documents). The main content area is titled 'Certified Contract' and shows a document from 'Sofdocs' titled 'Certified Contract of Employment'. The document text includes:

This Agreement is made and entered into as of the dates indicated below, by and between the **Softdocs County Board of Education** (hereinafter called employer), and **Vince Silvestri**.

5908 CAMBER DR SAN DIEGO, CA 90210

IN CONSIDERATION of the promises hereinafter stated, the employer has offered and the employee has accepted employment, as a member of the teaching or administrative staff of the Public School System of the Softdocs Board of Education and shall be employed for the period from "July 1", 2020 to "June 30", 2021. The employee hereby agrees to complete a full school year for certified staff, as defined by the rules of the State Board of Education, and in accordance with the annual school calendar and regulations adopted by the employer. If this contract commences subsequent to the beginning of an academic school year, the employee agrees to perform designated duties on the remainder of employee work days in the school year, as defined by the rules of the State Board of Education and in accordance with the employer's annual school calendar and work schedules.

The annual salary is based on an approved salary schedule for certified personnel employed for a full school year, as defined by the rules of the State Board of Education and in accordance with the official work schedules adopted by the employer. The annual contract salary of "**\$65,600.00**" is based on a **TS** certificate with **12** years of creditable experience shall be paid in accordance with the official salary schedule and official work schedules adopted by the employer.

The salary specified herein may be subject to adjustment according to the Official Code of South Carolina Annotated, Title 20, applicable to the classification and type of service to which the employee has been assigned, without obligation by the employer to make up any deficit beyond such sum as shall become uniformly applicable to all employees of the same group, classification, type and length of creditable service, as determined by any law or laws now or hereinafter in operation regulating the financing of the Public School System of the Softdocs Board of Education. The salary is conditioned upon the continued availability of any and all funds available at the time this contract, with all salaries subject to upward or downward adjustments according to increases or decreases in such funding from the level projected at the time this contract is signed. The contract salary will be decreased based on any decrease in the minimum amount required to be paid to such an employee under state law and State Board rules applicable to the **2020** work year and may be decreased based on a finding by the Board of Education that there has been a decrease in funds from any source due to unforeseen shortfalls in revenue below revenue amounts projected at the time of this contract so as to justify a reduction in the amount for salaries. The annual salary stated herein shall be subject to an adjustment on a pro rata basis for the number of employee work days the employee does not complete during the annual school year due to employment after the start of the academic school year, resignation, termination, or employee's absence when there is no accumulated leave to cover such absence, in accordance with the following formula:

$$\frac{\text{(Number of Days in Pay Status)}}{\text{(Number of Workdays in Workyear)}} \times (\text{salary}) - \text{Amount Paid} = \text{Amount Due}$$

The number of days in pay status is equal to the minimum required to be paid to such an employee for the minimum number of days required under state law and State Board rules applicable to the **2021** work year and in accordance with the official work calendars and salary schedules adopted by the employer in the event the employee is eligible for

At the bottom of the document viewer, there are 'Download' and 'Print' icons.

FIGURE 6.2 Self-Service – Document Viewer