

Business Process	Navigation
1. To create a new form 2. Search for a previously submitted form	1. Main Menu > Finance Navigation > Employee Self-Service > Forms > 2. Main Menu > Finance Navigation > Employee Self-Service > Forms > Search / Fill a Form

Process 1: Create a From

Use the following navigation to create a Form.

1. From the Menu, select **Finance Navigation** > **Employee Self-Service** > **Forms** >
2. Select a Form.
3. Select **Add a New Value**
4. Please note: Any field displaying an asterisk (*) is required.
5. **Subject:** Please enter a relevant title. This Subject will display in the Approver's worklist.

6. **Priority:** Changing the Priority will not cause a change to the position in the Approver's worklist, so this may be left as a 3 – Standard.
7. **Due Date:** May be entered.
8. **Status:** This updates as the form is created (Initial), in workflow (Pending) and then either Approved or Denied.
9. Detailed instructions specific to the Form will be displayed on the **Instructions** tab.

More Information:

10. Enter any additional information in the **More Information** field.

11. You may attach any files relevant to the form. Click **Attachments**

Favorites | Main Menu > Employee Self-Service > Forms > Vendor Request

Form | Instructions | Attachments

Vendor Request

*Subject:

Download Templates			Personalize Find View All First 1 of 1 Last
	Description	Attached File	Open
1			Open

Upload your attachments			Personalize Find View All First 1 of 1 Last
	*Description	Attached File	Attach Open
1			Attach Open

12. To upload an attachment, click , then Browse. Select the desired file, and click .
13. Certain forms will have a file that should be filled out and submitted along with the form. One example of this is the Deposit Report Form:

Favorites | Main Menu > Employee Self-Service > Forms > Deposit Report

Form | Instructions | Attachments

Deposit Report

*Subject:

Download Templates			Personalize Find View All First 1-2 of 2 Last
	Description	Attached File	Open
1	CE_Deposit_CF_List.xls	CE_Deposit_CF_List.xls	Open
2	IS_Deposit_CF_List.xls	IS_Deposit_CF_List.xls	Open

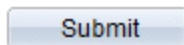
Upload your attachments			Personalize Find View All First 1 of 1 Last
	*Description	Attached File	Attach Open
1			Attach Open

- 14.
15. To detach an attached file, click on the [Open](#) , choose Save As, and save the file.
16. To upload the completed spreadsheet, click , then Browse. Select the desired file, and click ..

More Information:

17. Return to the main Form page by clicking **Form** and click **Save** to save the transaction.

18. Click

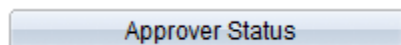


From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Kenneth Schumacher	04/25/2013	Transaction Approved	Approval Workflow	3-Low	FormApproval_81_ASSET_RET_1900-01-01_N_0_AssetRetirementForm_test-18	Mark Worked	Reassign
Kenneth Schumacher	05/06/2013	Transaction Approved	Approval Workflow	3-Low	FormApproval_191_VENDOR_ADD_1900-01-01_N_0_VendorRequestVendor-35	Mark Worked	Reassign
Kenneth Schumacher	05/06/2013	Transaction Approved	Approval Workflow	3-Low	FormApproval_192_VENDOR_ADD_1900-01-01_N_0_VendorRequestVendor-36	Mark Worked	Reassign

19. After action has been taken on your form, you will see activity in your worklist: **Main Menu > Finance Navigation > Worklist > Worklist**. If your request was denied please review the comments on the form. You may need to add additional information and submit your form again.

- 20.

21. Click on



The screenshot shows a web browser window with the following breadcrumb trail: **Favorites** > **Main Menu** > **Employee Self-Service** > **Forms** > **Search/Fill a Form**.

The main heading is **Vendor Request**. Below it, the **Subject** is **NEW VENDOR**.

A section titled **Review/Edit Approvers** contains a single entry:

- Vendor Request: 80:Approved** (with a green checkmark icon)
- 1** (in a small box)
- Approved** (in a green box with a green checkmark)
- [Mary Engel](#)
Vendor Creator
07/22/13 - 11:30 AM

An **OK** button is located at the bottom left of the form.

22. The approver(s) and any comments will be displayed.

The screenshot shows a web browser window with the following breadcrumb trail: **Favorites** > **Main Menu** > **Employee Self-Service** > **Forms** > **Search/Fill a Form**.

The main heading is **Vendor Request**. Below it, the **Subject** is **NEW VENDOR**.

A section titled **Review/Edit Approvers** contains a single entry:

- Vendor Request: 1319:Denied** (with a red X icon)
- 1** (in a small box)
- Approved** (in a green box with a green checkmark)
- [Rick Marko](#)
WFL AP Vendor Form Approvers
09/03/13 - 1:16 PM
- Denied** (in a red box with a red X icon)
- [Jan Fennell](#)
Vendor Creator
09/05/13 - 2:02 PM

Below the approvers, there is a **Comments** section:

- Jan Fennell at 09/05/13 - 2:02 PM**
- 09/05/2013 Added address to vendor ID#17064. jf

At the bottom, there is a **Comment History** section.

23. Click on  to expand Comments or Comment History.
24. If it was approved and the form was for a vendor, the newly created vendor ID number will be listed as a hyperlink at the bottom of the form. The creation of a vendor ID or update of an address doesn't mean that it's immediately accessible, but rather the vendor request has been entered into the system for final approval.

More Information:

Related Documents			
Link to Related Component	Component Name	Submitted By	Submitted Date/Time
1 SHARE/0000044640	VNDR_ID	029784	07/22/13 11:31:01AM

Process 2: Search for a Previously Created Form

Use the following navigation to locate a Form that was created. All created forms will be available for review.

- From the Menu, select **Finance Navigation > Employee Self-Service > Forms > Search /Fill a Form**

Favorites Main Menu > Employee Self-Service > Forms > Search/Fill a Form

Search/Fill a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Sequence Number: =

Subject: begins with

Form: begins with

Document Key String: begins with

Priority: =

Due Date: =

Approval Status: =

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-11 of 11 Last

Sequence Number	Subject	Form	Document Key String	Priority	Due Date	Approval Status	Created Date/time
72	test	VENDOR ADD	SHARE/0000044636	3-Standard	(blank)	Approved	06/26/2013 3:32PM
73	ssn	VENDOR ADD	(blank)	3-Standard	(blank)	Approved	06/26/2013 3:49PM
74	ssn testtttt	VENDOR ADD	(blank)	3-Standard	(blank)	Approved	06/26/2013 3:51PM
75	ssn pt 2	VENDOR ADD	SHARE/0000044637	3-Standard	(blank)	Approved	06/26/2013 3:57PM
76	with SSN	VENDOR ADD	(blank)	3-Standard	(blank)	Approved	06/27/2013 10:21AM

- All forms created will be displayed.
- If the Approval Status for your form displays "Initial", it needs to be submitted for workflow to process. (Process 1, Step 18)