Initiating & Processing Forms Using the eForms Tile

Current forms that are initiated by academic units that have transitioned to eForms in Campus Connection:

- Class Permit
- Administrative Course Drop Request
- Grade Reporting Form

The eForms Tile allows a user to submit and evaluate a form.

Navigation: Campus Solutions Administrator Homepage > NDSU eForms tile

Initiating

1- Click on the NDSU eForms tile

2- Click on Registration and Records

3- Click on the relevant 'Admin-XXXX' form to be initiated
4- Complete the form by filling in necessary fields
    a. Information entered in the Comments box at the bottom of the form will be visible to the student and the Registration and Records processing staff

5- Click Submit

Processing

1-Click Evaluate an eForm and then clicking **Search** will bring up all forms that are in the user's queue for review. The 'Search by' options can be left blank; however, a user can also filter to a specific student, Form type, Form ID or Form status if necessary.

Landing Page

- Customer Account Services ⌄
- Financial Aid ⌄
- Registration and Records ⌄
- Evaluate an eForm
- Update an eForm
- View an eForm

Search by:

Form ID	Begins With	
Form Type	Begins With	🔍
Form Status	is Equal To	⌄
Student Name	Begins With	
Student ID/Empl ID	Begins With	

Use these Search options to filter your search results, if necessary

Search   Clear

4 rows

	Form ID ⌃	Form Type ⌃	Form Status ⌃	Student ID/Empl ID ⌃	Student Name ⌃	Term ⌃	Original Operator ⌃	Original Date ⌃	Last Operator ⌃	Last Date ⌃
1	100149	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-04-19	dholth	2021-04-19
2	100150	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-04-19	dholth	2021-04-19
3	100248	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-05-03	dholth	2021-05-03
4	100250	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-05-03	dholth	2021-05-03

2- Click on the Pending form that needs to be processed.

File Attachments

2 rows

	Status	Action	Description ⌃	File Name ⌃	Delete
1	✅	View		Test1.docx	Replace
2	✅	View		Test2.docx	Replace

Add

▼ Comments

All documentation is correct, CH

Search   Deny   Recycle   Hold   Approve

Select the appropriate action option. See description of each below.

3- Once reviewed, use the actions at the bottom of the form to process. Options available for processing will depend on user's access role within the approval.

- **Search:** returns the user to the search page
- **Deny:** form updates to Denied status
- **Recycle:** form updates to Recycled and returns to the initiator for resubmission or withdrawal, make sure to include instructions, in the Comments field, to the initiator detailing what action needs to be taken
- **Hold:** form is put on hold by the last approver working on it, as they were not yet ready to approve, deny, submit, etc. (if you put a form on hold, you are now the only one that can go back in to process it)
- **Approve:** status depends on the number of approvals in the workflow.
    - For 2 or more approvals, the form will move to a Partially Approved status until the last final approval, and after the final approval, will update to Executed status.
    - For only 1 approval, the form will update directly to Executed.

To Check on the Status of a Form

1-Click View an eForm and then enter the information you may have regarding the form (i.e., student ID, Student Name, Form ID, etc). Click **Search** to bring up any forms with the information provided.

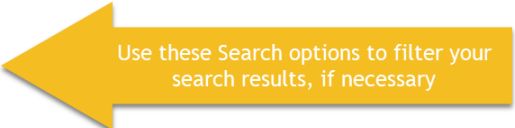| Search by:			
Form ID	Begins With ▾		
Form Type	Begins With ▾		🔍
Form Status	is Equal To ▾		▾
Student Name	Begins With ▾		
Student ID/Empl ID	Begins With ▾		

Use these Search options to filter your search results, if necessary

[Search] [Clear]

4 rows

	Form ID ⬦	Form Type ⬦	Form Status ⬦	Student ID/Empl ID ⬦	Student Name ⬦	Term ⬦	Original Operator ⬦	Original Date ⬦	Last Operator ⬦	Last Date ⬦
1	100149	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-04-19	dholth	2021-04-19
2	100150	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-04-19	dholth	2021-04-19
3	100248	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-05-03	dholth	2021-05-03
4	100250	NDUS_NAME	Pending		(blank)	(blank)	dholth	2021-05-03	dholth	2021-05-03

The form status column indicates where the form is at in the approval process.

Saved – form intitiator has saved to complete at a later time

Withdrawn – form intitiator has withdrawn the request

Recycled – form has been sent back to the initiator for additional information

Executed – form has been completely processed