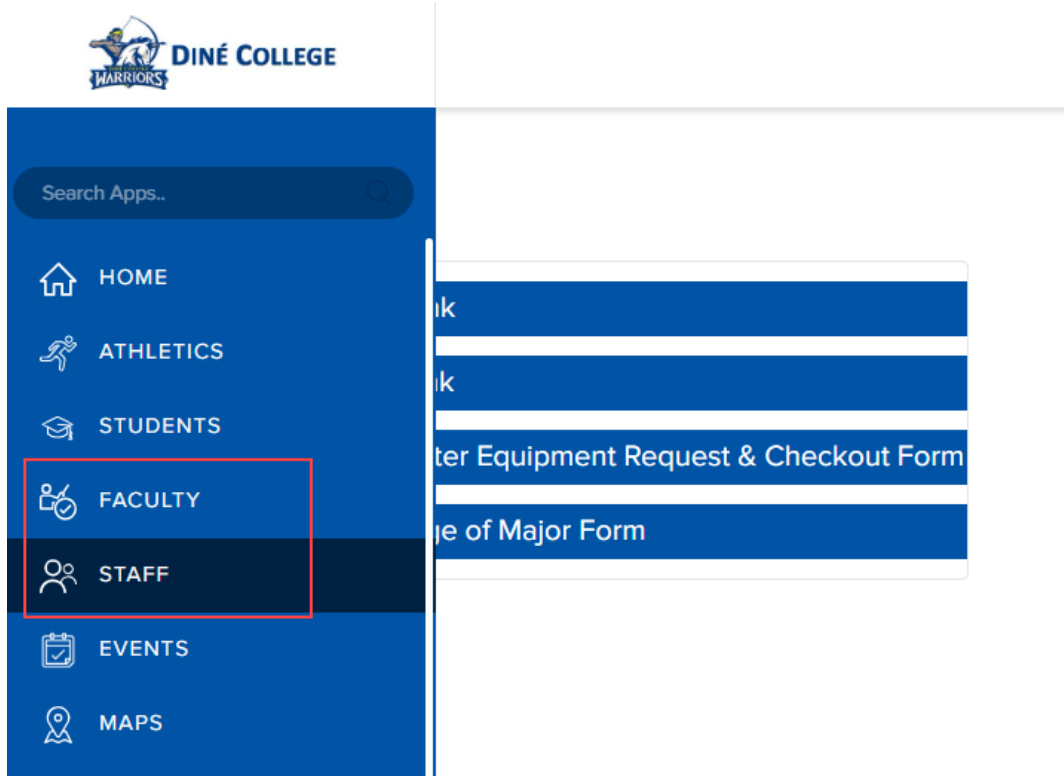
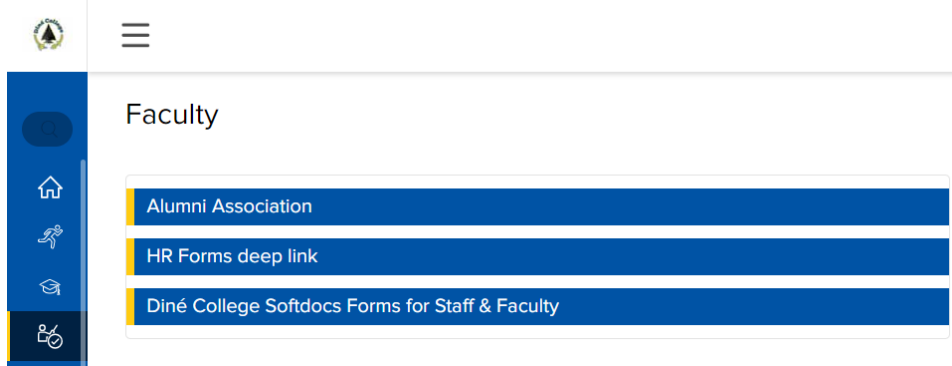


How to Access Softdocs Forms for Staff and Faculty

1. LOG INTO [MYDCPORTAL](#)
2. CLICK ON THE LEFT BLUE SIDE BAR AND SELECT EITHER STAFF OR FACULTY AND YOU WILL SEE "Diné College Softdocs Forms for Staff & Faculty"

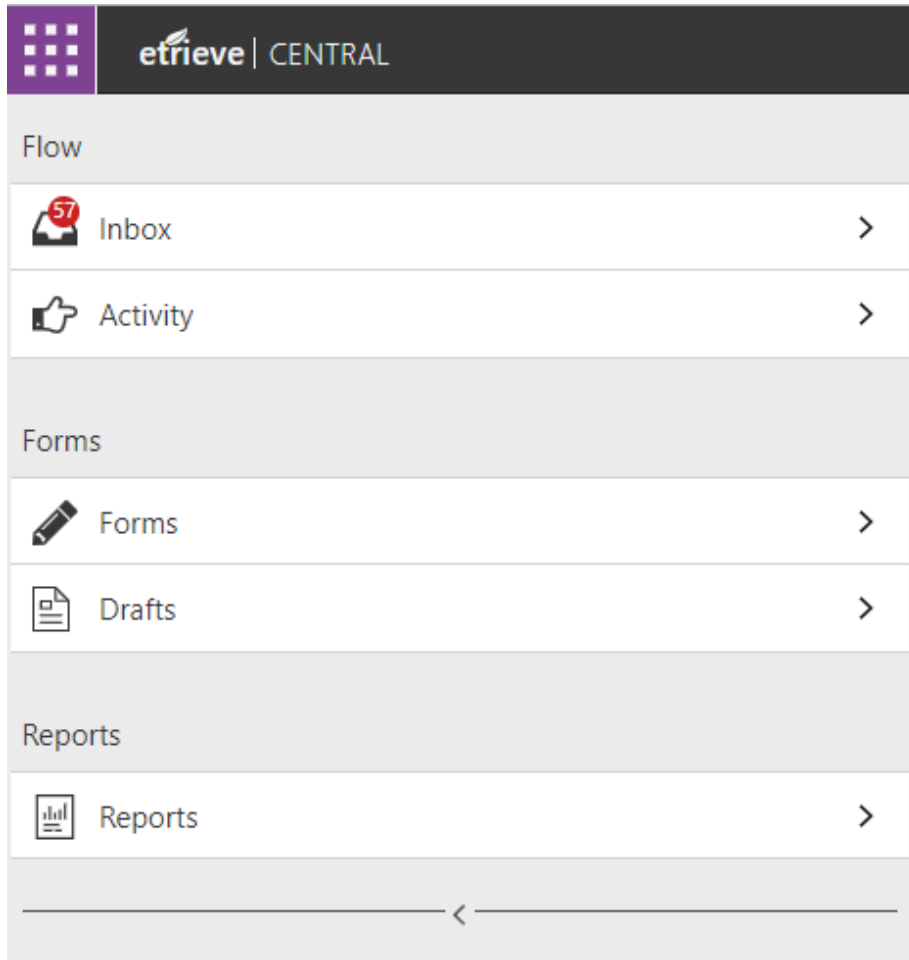


3.



4.

5. You will be directed to your SoftDocs Etrieve Central Flow; Inbox, Activity log, **Forms**, & Drafts. Click on Forms and your forms menu will appear.



- 6.
7. Your **Inbox** will show forms that require your attention if there is a **RED** dot that shows the number of forms that are in your queue. As part of the workflow, you will also receive emailed notifications that there is a form for you to process.
8. Your **Activity** will show everyone who worked (were a part of the workflow). No action can be done in your "Activity" menu other than to View the form history, download, and print. This is a digital log of all forms in which you were a part of.
9. By clicking on **Forms**, your forms menu (the forms for which you have access to) will appear.

10. Click on the form to open it up and begin filling it out.

11.
12. As the form initiator or submitter, you will complete all applicable and/or required data fields and click submit (located at the bottom of the form screen). You have the option to upload any supporting documentation (supported file types to upload are JPG, TIF, PDF, XPS, JPEG, PNG, BMP, GIF) unsupported file types will cause an error to appear).

13.

14. An error message may also appear upon clicking SUBMIT, if a **REQUIRED FIELD** has not been filled out:

Please inform the student that they may be put on a waiting list for a WiFi device.

Student Information

Student Name	Student ID	Email
<input type="text"/>	<input type="text"/>	<input type="text" value="Verify the correct email address"/>
Address	City	State
<input type="text"/>	<input type="text"/>	-- Select State --
Zip Code	Phone no.	Pickup Campus Center
<input type="text"/>	<input type="text"/>	<input type="text"/>

Equipment Information

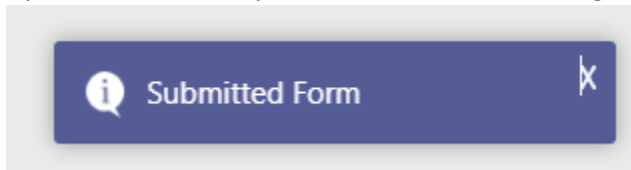
Computer Name	Computer ID	
<input type="text"/>	<input type="text"/>	
Computer Model #	Serial no.	
<input type="text"/>	<input type="text"/>	
Wireless Device	Wireless ID	
<input type="text"/>	<input type="text"/>	
Wireless Model #	IMEI #	
<input type="text"/>	<input type="text"/>	
IT Technician	Technician Email	Technician Rev
<input type="text"/>	<input type="text"/>	<input type="text"/>
IT Ticket or Comment		

Form is not submittable
Missing required fields

submit Attachments Download Print

15.

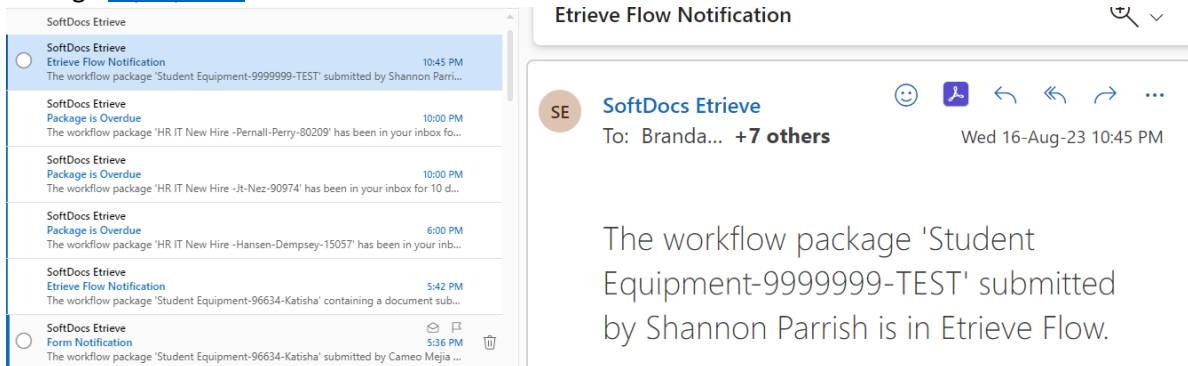
16. Upon successful completion of the form, a message that the form was submitted will appear:



17.

18. The form will move to the next step in the workflow, which could be an individual or a group.

19. They will receive emailed notifications in their DC email account; they can also access directly by navigating through [mydcportal](#) to the SoftDocs forms tab as shown above.



20.

21. The first recipient(s) in the workflow steps will open the form and complete their section to enter data.

22. The recipient will have "action" options to APPROVE, REFER to another user, RETURN to the submitter, view the form HISTORY, Upload ATTACHMENTS, LOCK AND UNLOCK the form if it is locked by another user, DOWNLOAD, and PRINT.

Package Items

- IT Student Computer Equipment Checkout Form

86556 19287246648 Tuba City

Equipment Information

Computer Name	Computer ID	
HP LAPTOP PRO BOOK G9	123456789	
Computer Model #	Serial no.	
Computer Model No	CKGQC00386624	
Wireless Device	Wireless ID	
R717 Franklin mobile hotspot	Wireless ID	
Wireless Model #	IMEI #	
Wireless Model #	IMEI #	
IT Technician	Technician Email	Technician Review Date
Glo Edison	email address	08/16/2023

IT Ticket or Comment

issued laptop. student will pick up device at TC center. |

2nd IT Technician	2nd Technician Email	2nd Technician Review Date

IT Ticket or Comment

Student Signature and Acknowledgment of Receipt of Computer Equipment

Student	Date

Approve Refer Return History Attachments Locked Download Print

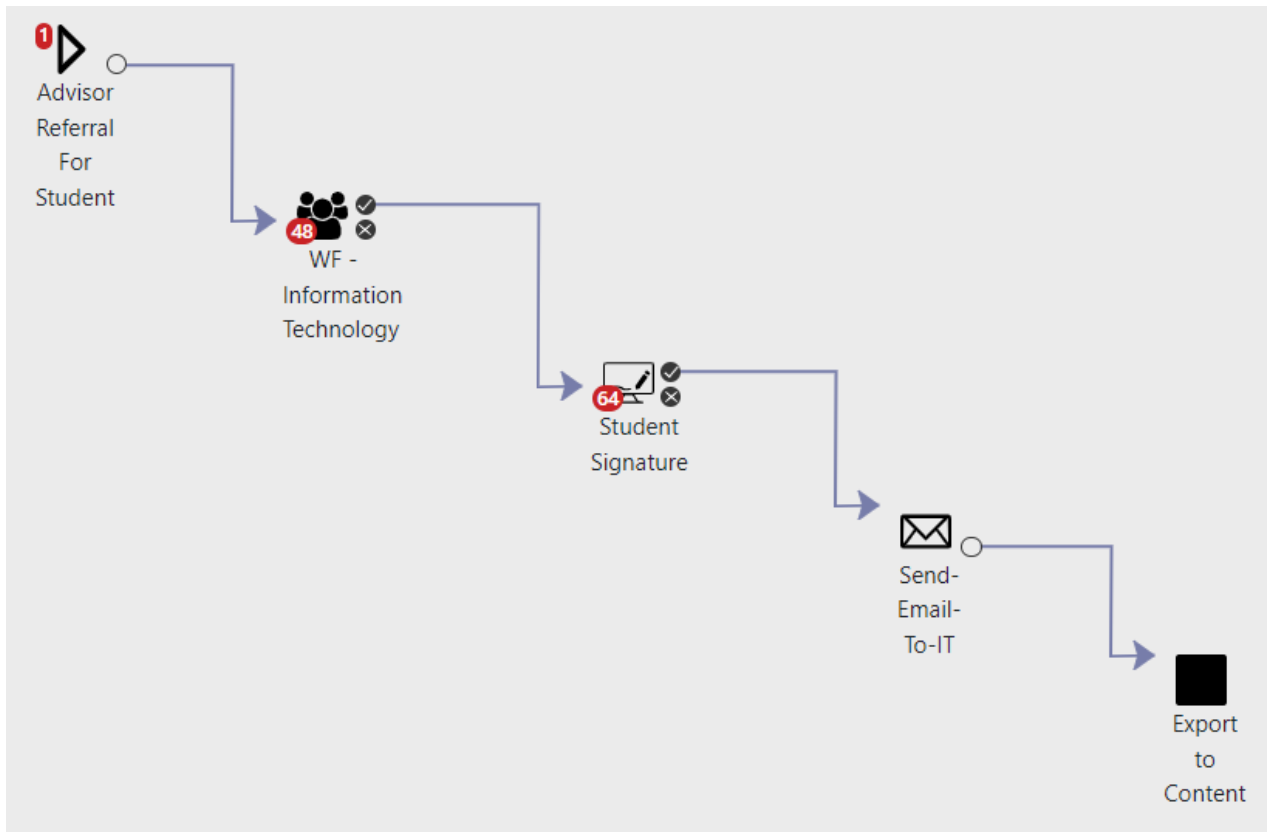
- 23. If you wish to Refer the form to another person; it will go to them to take action.
- 24. If you wish to Return the form to the submitter or another person within the workflow; it will be returned to that person and will come back to you to approve.
- 25. TO LEAVE A NOTE OR REASON AS TO YOUR REFER OR RETURN; CLICK ON THE HISTORY ICON AND NEW COMMENT. ENTER YOUR COMMENT, SAVE, AND THEN APPROVE, REFER, OR RETURN.

26.

The screenshot displays a software interface for managing travel requests. On the left, a 'History' sidebar is open, showing a list of actions: 'Shannon Parrish' received the package on 11-17-2023, 'Shannon Parrish' approved the trip on 11-20-2023, and 'WF - Verify Funds' received on 11-20-2023. Below the history is a 'Comment' field with the text 'reason for returning or referign/NOTE'. The main form area contains fields for 'Date of Request' (11/14/2023), 'Fiscal Year' (23/24), and 'TA Number' (10205). It also includes 'Travel Type' (Per Diem) and 'Do you need a Travel Advance?' (Yes). Employee information includes 'Employee ID' (21195), 'Employee Full Name' (Shannon Parrish), 'Department' (TEST), and 'Employee Email' (sparrish@dinecollege.edu). Charge account numbers are '123-236-8953' and '000-0000-0000'. The bottom navigation bar includes icons for 'Approve', 'Refer', 'Return', 'History', 'Attachments', 'Locked', 'Download', and 'Print'. The 'History' icon is highlighted with a red box.

27. The form will move through the workflow until it ENDS or in this case, will be imported into the student's electronic document repository, Etrieve Content:

28.



29.

Form Monitoring and Form Workflow Administration:

- 30. Department form owners, module owners, and designated frequent form users, will be assigned to act as **form administrators** and will have the responsibility to MTR (monitor, track, and report) on forms within their departments.
- 31. They have the authorization to assist with UNLOCKING forms, RE-ASSIGNING forms to another user, and MOVING forms back or forward to another step in the workflow.

The screenshot displays the 'Workflow Monitor' interface. At the top, there is a search bar with 'stu' entered and a 'Refresh' button. Below the search bar is a table with columns: Name, Status, Workflow, Workflow Descri..., Current Step, Time at Current S..., Time in Workflow, Date Workflow St..., Date Package Sta..., and Assigned To. Below the table, there is a 'Details' section for a specific workflow package. The details include:

- Status: In Progress
- Workflow: IT Student Computer Equipment Request & Checkout Form
- Description: Advisor, Coordinator, Faculty initiates form on behalf of student-submit form to IT Department > IT staff received email notification and flow inbox, IT identifies, assigns, and Issues Equipment record info on equipment portion > IT "Approves" request >notification form goes to student for Student acknowledgment and signature Receipt> upon student signature > notification goes to originator and IT that student has signed and form has been "processed" > File form in student file in Etrieve Content
- Current Step: WF - Information Technology
- Time at Step: 1 day, 8 hours
- Time in Workflow: 1 day, 8 hours
- Workflow Started: 08-15-2023, 3:18 pm
- Package Started: 08-15-2023, 3:21 pm
- Assigned To: WF - IT Admins & Techs
- Error Messages:
- Locked By: Trisha L Jumbo
- Actor Filter:

Below the details are 'Package Actions' including 'Unlock Package', 'Move Package', and 'Reassign Actor'. To the right of the details is a workflow diagram showing the following steps: 'Advisor Referral For Student' (start), 'WF - Information Technology' (current step), 'Student Signature', 'Send-Email-To-IT', and 'Export to Content' (end).

32.

For assistance, requests, and further forms training, please submit an [IT Helpdesk ticket](#).

End.