General Request eForm

**Purpose:**
To provide Dartmouth employees and students a method of submitting Finance Centers requests, in lieu of email that is:

- Secure
- Trackable

**Workflow Routing:**
- Approval
- Finance Centers
- GL Chart
- Procurement
- Tax Processing
- Oracle Processing
- Payroll
General Request eForm

Request Types

- To add GL Chart segments
- Any question or request
- Check the status of a Vendor Payment
- Ad hoc report request or questions on a report
- Request System Access (Reports/Oracle/Kronos)
- Any HR/Payroll request from personnel action, Quick Pays, and Student Kronos corrections.
- For students to submit Social Security Numbers

Provide Secure method for providing Social Security Numbers and Date of Birth fields.
# General Request eForm

## Request Type and Function

<table>
<thead>
<tr>
<th>Request Type*</th>
<th>Request Explanation*</th>
<th>Date of Birth</th>
<th>Social Security</th>
<th>Dept. Admin Add’l Access**</th>
<th>Attachment</th>
<th>Approver</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart of Account Change</td>
<td>Required</td>
<td></td>
<td></td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>General Question/Other</td>
<td>Required</td>
<td></td>
<td></td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>Vendor Payment Status</td>
<td>Required</td>
<td></td>
<td></td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>Reporting</td>
<td>Required</td>
<td></td>
<td></td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>System Security Access</td>
<td>Required</td>
<td></td>
<td></td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>HR/Payroll/Tax Reporting</td>
<td>Required</td>
<td>Optional</td>
<td></td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>Student Information Submittal</td>
<td>Required</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
</tbody>
</table>

*Request Type and Explanation Required

**Dept Admin Add’l Access Required if submission needs to be viewed by someone other than the Submitter
# General Request eForm

## Workflow Routing

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Submitter</th>
<th>Finance Center</th>
<th>Host Dept.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add Attachments</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Route for Approval</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Route to Finance Center</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Route to Host Dept</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Route to Other Host Dept</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Route back to Submitter</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Change Request Type</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Complete</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Cancel</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**Host Department Functions**

- GL Chart
- Chart of Account Changes
- Accounts Payable
- Tax Reporting
- Procurement Services
- Vendor Questions
- Oracle Processing
- System Access
- Dartmouth Payroll
- Payroll/Tax Reporting
General Request eForm
Chart of Account Change

Purpose:
Department requests chart string segment change, in which Department would like the Finance Center to complete the Segment Request form and submit to GL Chart

Workflow Routing:
- **Submitter:**
  - Submits Request to Finance Center
  - Routes for Approval (if necessary)
- **Finance Center**
  - Complete the Segment Request form
  - Attaches form to eForm request
  - Routes for Approval (if necessary)
  - Routes for Additional Information
  - Routes to GL Chart for processing
- **GL Chart**
  - Reviews request, approval, and attachment
  - Routes for Additional Information
  - Routes for Approval (if necessary)
  - Marks Request Complete
General Request eForm
General Question/Other

Purpose:
General Requests that have not been defined in another Request Type

Workflow Routing:
- **Submitter:**
  - Submits Request to Finance Center
  - Routes for Approval (if necessary)
- **Finance Center**
  - Complete the Segment Request form
  - Attaches form to eForm request
  - Routes for Approval (if necessary)
  - Routes for Additional Information
  - Routes to Host for processing
General Request eForm
Vendor Payment Status

Purpose:
Department requests the status of a Vendor Payment

Workflow Routing:
- Submitter:
  - Submits Request to Finance Center
- Finance Center
  - Complete checks to status
  - Routes for Additional Information
  - Marks request Complete
General Request eForm Reporting

Purpose:
Department requests ad hoc report or has questions regarding details on a report

Workflow Routing:
- **Submitter:**
  - Submits Request to Finance Center
  - Routes for Approval (if necessary)
- **Finance Center**
  - Complete creates or researches report
  - Attaches report to eForm request
  - Routes for Additional Information
  - Marks Request Complete
General Request eForm
System Security Access

Purpose:
Department requests system access change, in which Department would like the Finance Center to complete the System Security Access form and submit to Oracle Processing.

Workflow Routing:
- **Submitter:**
  - Submits Request to Finance Center
  - Routes for Approval (if necessary)
- **Finance Center**
  - Complete and Attaches the System Security Access form
  - Routes for Approval (if necessary)
  - Routes for Additional Information
  - Routes to Oracle Processing
- **Oracle Processing**
  - Reviews request, approval, and attachment
  - Routes for Additional Information
  - Routes for Approval (if necessary)
  - Marks Request Complete
General Request eForm
HR/Payroll/Tax Reporting

Purpose:
Department submits requests related to:
• HR – Personnel Action – Hiring, Transferring, Terminating, Additional Assignment or Payment
• Payroll – Quick Pay/Stop Payment, Taxable Imputed Income
• Tax Reporting – Taxable Income from non-AP payment

Workflow Routing:
➢ Submitter:
  ➢ Submits Request to Finance Center
  ➢ May provide Date of Birth and SSN for New Hire or non-Employee
  ➢ Routes for Approval (if necessary)
➢ Finance Center
  ➢ Reviews requests, approval, and attachment
  ➢ Routes for Approval (if necessary)
  ➢ Routes for Additional Information
  ➢ Routes to Payroll or Tax Reporting
➢ Payroll or Tax Reporting
  ➢ Reviews request, approval, and attachment
  ➢ Routes for Additional Information
  ➢ Routes for Approval (if necessary)
  ➢ Marks Request Complete
General Request eForm
Student Information Submittal

Purpose:
Student submits Social Security or tax forms for Tax Processing for taxable payments (gifts, prizes and awards, internships)

Workflow Routing:
- Department
  - Instruct students to complete form
    - Select Finance Center
    - Select Student Information Submittal Request
    - Request Explanation
    - SSN and/or Tax Documents
- Student Submitter:
  - Submits Request to Finance Center
- Finance Center
  - Routes for Additional Information
  - Routes to Tax Reporting
- Tax Reporting
  - Reviews request and attachment
  - Routes for Additional Information
  - Marks Request Complete
# General Request eForm

## Social Security Number Viewing

- **HR/Payroll/Tax Reporting**
- **Student Information Submittal Request Types**

<table>
<thead>
<tr>
<th>Social Security Number</th>
<th>Submitter</th>
<th>Approver</th>
<th>Finance Center</th>
<th>Payroll/Tax Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submission</td>
<td>R/W</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>R/W</td>
<td>-</td>
<td>R/W</td>
<td>RO</td>
</tr>
<tr>
<td>Pending Finance Center</td>
<td>R/W</td>
<td>-</td>
<td>R/W</td>
<td>RO</td>
</tr>
<tr>
<td>Pending Host Dept.</td>
<td>R/W</td>
<td>-</td>
<td>R/W</td>
<td>RO</td>
</tr>
<tr>
<td>Additional Information</td>
<td>R/W</td>
<td>-</td>
<td>R/W</td>
<td>RO</td>
</tr>
<tr>
<td>Complete</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>RO</td>
</tr>
<tr>
<td>Cancelled</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

### Key
- **RO**: Read-Only
- **R/W**: Read/Write
- **-**: No Viewing

*Note: Date of Birth will be viewable throughout processing*
General Request eForm
Workflow and Life Cycles

- Finance Center Queues
  - GEN - Pending Submission (0)
  - GEN - Pending Approval (0)
  - GEN - Received (5)
  - GEN - In Process (0)
  - GEN - Hold (0)
  - GEN - Additional Information (0)
  - GEN - Vendor Maintenance (0)
  - GEN - Tax Processing (0)
  - GEN - Payroll (3)
  - GEN - GL Chart (0)
  - GEN - Oracle Processing (0)

- Host Dept Queues
  - Vendor Maintenance – Procurement Services
  - Tax Processing – Account Payable
  - Payroll – Dartmouth Payroll
  - GL Chart – GL Chart
  - Oracle Processing – Oracle Processing
General Request eForm Workflow - Received

- Assign to me
- Assign to Other User
- Assign to Other Finance Center
- Route to other Approver
- Cancel Request
General Request eForm Workflow - In Process

- **Assign to**
  - me
  - Other User
  - Other Finance Center

- **Route to**
  - Back to Requestor
  - other Approver

- **Send to**
  - Vendor Maintenance Queue
  - Tax Processing Queue
  - Payroll Queue
  - GL Chart Queue
  - Oracle Processing Queue

- **Tasks**
  - Hold
  - Add Area
  - Import Document
  - Send Received Email
  - Cancel Request
  - Change Request Type
  - Complete
General Request eForm Workflow – Host Department Queues

- Complete
- Return to Finance Center
- Import Document
- Route to other Approver

FIN - General Requests
- GEN - Pending Submission (0)
- GEN - Pending Approval (0)
- GEN - Received (0)
- GEN - In Process (1)
- GEN - Hold (0)
- GEN - Additional Information (0)
- GEN - Vendor Maintenance (0)
- GEN - Tax Processing (0)
- GEN - Payroll (3)
- GEN - GL Chart (0)
- GEN - Oracle Processing (0)
General Request eForm Workflow – Route to other Approver

To Route to another Approver that was not on the form:
- Double-click on the form to make the form editable
- In the Approvals section begin typing the last-name of the Approver in the text box
- Once the name appears below the text box, drag your cursor to and click to select the name

- Click on the “Add This Approver” button

- Scroll down and click on the “Save Updates” button at the bottom of the form

- Select “Route to other Approver” within the Workflow Task bar at the top of the window
General Request eForm

Custom Queries

Use Custom Queries to find an eform:
- ‘Custom Queries’ is located under the “Home” tab
- Click on ‘Finance General Request and Related Documents’
- Enter your search criteria in the Query fields
- Click ‘Search’ to run your query.

Helpful Hints:
- ‘Submitter’ is the only name field that is formatted as: First, M, Last, so querying by last name requires an “*” prior to the last name (i.e. *Wallace)
- Double-click on the Query field, to get duplicate fields to search multiple criteria (i.e. range of dates)
- Formula operators are available at the end of query fields to allow fine tuning the query (>= 12/1/2015 <= 1/1/2016)
  - = Equal
  - <> Does not contain
  - > Greater than
  - < Less than
  - >= Greater than or equal
  - <= Less than or equal
Use Filters to refine your search by:
• Request Type
• Finance Status

The Column Box indicate additional formula function

Column Filters allow for additional refining

View the document selected by clicking the double arrow at the bottom of the screen.