General Request eForm

Submitter Instructions - Geisel
General Request e-Form

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

- Secure
- Trackable

**Request Types:**

<table>
<thead>
<tr>
<th>Type of Request</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart of Account Change</td>
<td>To add GL Chart segments</td>
</tr>
<tr>
<td>General Question / Other</td>
<td>Any question or request</td>
</tr>
<tr>
<td>Vendor Payment Status</td>
<td>Check the status of a Vendor Payment</td>
</tr>
<tr>
<td>Reporting</td>
<td>Ad hoc report request or questions on a report</td>
</tr>
<tr>
<td>System Security Access</td>
<td>Request System Access (IRA/Oracle/Kronos)</td>
</tr>
<tr>
<td>HR / Payroll / Tax Reporting Submittal</td>
<td>Any HR/Payroll request for Personnel Action, Quick Pays, and Student Kronos corrections</td>
</tr>
<tr>
<td>Student Information Submittal</td>
<td>For students to submit Social Security Numbers</td>
</tr>
</tbody>
</table>

** Provides a secure method for providing Social Security Numbers and Date of Birth fields
## 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>X</td>
<td></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>X</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>X</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

## System Security Access

**Purpose:**
Route Security Access forms to Oracle Processing

**Workflow Routing:**

- **Submitter:**
  - Submits Request to Finance Center
  - Uploads completed Security Access Form
  - Routes for Approval (if necessary)

- **Finance Center**
  - Routes to Oracle Processing

- **Oracle Processing**
  - Reviews request, approval, and attachment
  - 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 to Payroll or Tax Reporting

➢ Payroll or Tax Reporting
  • Reviews request, approval, and attachment
  • Routes for Approval (if necessary)
  • Marks Request Complete
General Request eForm
Student Information Submittal

Purpose:
Student submits Social Security or tax forms 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 to Tax Reporting

- **Tax Reporting**
  - Reviews request and attachment
  - Marks Request Complete
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
General Request eForm
Custom Queries

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.