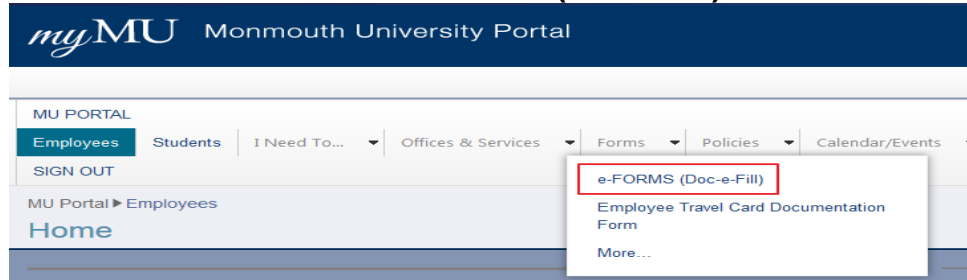


MONMOUTH UNIVERSITY

How to Use ADVISOR*INITIATED e-FORMS

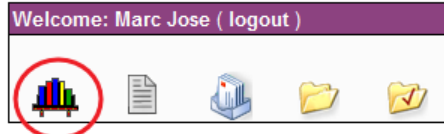
[myMU Portal](#)

Forms > e-FORMS (Doc-e-Fill)



Login: Use **YOUR MONMOUTH UNIVERSITY LOGIN** and **PASSWORD**

Select: Document Library (1st ICON – row of books)



After selecting the Document Library icon, a listing of ADVISOR*INITIATED e-FORMS will be displayed below.

Once the appropriate e-Form is selected, the Form will be displayed on the right half of the screen.

Fill Out Form: STUDENT ID*NO (7 digits – no ‘S’ and -0- fill e.g. 0123123) and Click “UPDATE”

The student’s information will automatically populate into the first section of the e-Form. Please make sure that this is the correct student. If not, start over by clicking on the icon for the Document Library and reselect the e-Form. If it is the correct student, continue with filling out the e-FORM.

****Please note that some forms require that all fields be completed.***

Routing e-Form: Once you have completed filling out the e-Form, Click “SEND”

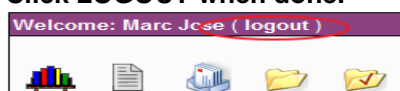
You will also have the option to attach **PDF documents, make additional comments and Save your e-Form as a draft.

(Drafts are accessible via the e-Form Draft icon )

*****All attachments must be saved in PDF format before it can be attached.***

THE e-FORM WILL BE APPROPRIATELY ROUTED TO THE DEPARTMENT FOR REVIEW.

Logout: Click LOGOUT when done.



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How to Send Back an e-Form (History)

Sometimes an e-Form will need to be routed back to the initiating advisor/department/approver/etc. for necessary revisions or additional information. Please see the below steps on how to do this.

Click on the Destination drop-down menu for the e-Form you want to route back and select "History"

The screenshot shows a web interface for routing an e-Form. A dropdown menu for 'Destination' is open, listing various individuals and departments. 'History' is highlighted in blue. Below the dropdown, there are buttons for 'Send/Authorize', 'Deny', 'Update', 'Attachments', 'Print Preview', and 'Cancel'. A 'Comments' text area is visible below the buttons.

Click on "History" again. This will now bring up a list of the individuals who have previously worked on the particular e-Form.

The screenshot shows the 'History' dropdown menu open, displaying a list of individuals who have previously worked on the e-Form. 'test, test' is highlighted in blue. The 'Deny' button is circled in red in the original image.

Select the Individual who you would like to send the form back to. *In the Comments section, please explain why the form is being routed back and Click "Deny"

****Please be aware that students who initiate a form will be able to see any comments you enter into the comments section.***

The screenshot shows the 'Deny' button selected and a comment entered in the 'Comments' text area: 'Please provide additional details.' The 'Deny' button is circled in red in the original image.

The form has now been routed back to the selected individual.

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How to Update/Make Changes to an e-Form

Received e-Forms can be updated and changes can be made before approving or routing to a selected destination. Please see the below steps on how to do this.

Click on your Inbox  and open the received e-Form you want to update or make changes to.

Update or make the necessary changes to the e-Form and Click UPDATE. (After clicking on Update, the e-Form will close and return back to your Inbox. ****You must go back into your Inbox and open the form to Route/Re-Route/Approve/etc.****)

Destination Send/Authorize Deny **Update** Attachments Print Preview Cancel

Comments:



The History Panel will display the History of the particular e-Form you have open. It will show who sent/approved/updated the e-Form and what the status is.

| History | | | |
|------------------|-----|-----------------|---|
| Start: test test | --> | reg 2 Registrar | 07/21/15 11:23 AM Sent View |
| reg 2 Registrar | --> | reg 2 Registrar | 07/21/15 11:24 AM Saved View (Modified) |



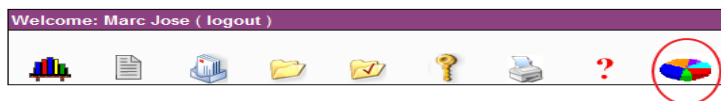
***Please note that each version of the e-Form prior to the last change or modification can be viewed by clicking on the [View](#) link to the far right of the History Panel.**

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Reporting

Within e-Forms, you are able access a few reporting features which provide you with a summary of your e-Form activity as well as details of your e-Form activity. Any e-Form you have Initiated/Approved/Denied will appear on the reports.

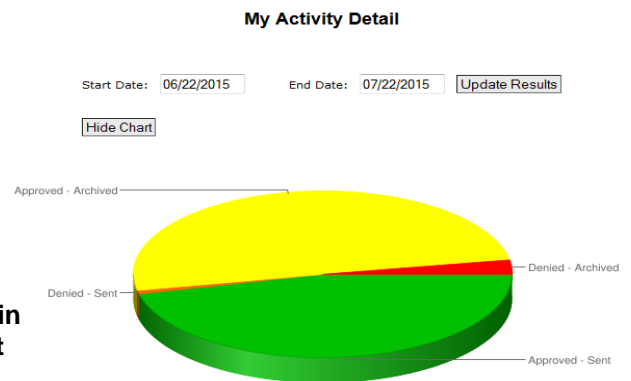
To access the Reporting function of e-Forms, click on the Pie Chart icon at the end of the e-Form Toolbar Menu.



- Reports
- My Action Summary
 - My Activity Detail
 - My Form Activity

Reports will appear on the right half of the screen. Fields within the report are clickable to provide you additional details about your e-Form activity.

***Please note that e-Forms is best viewed using Internet Explorer. Some functions may not work properly in other browsers.**



| Status | Total |
|------------------------|-------|
| Approved - Sent | 67 |
| Denied - Sent | 1 |
| Approved - Archived | 73 |
| Denied - Archived | 4 |
| Originated - Documents | 0 |