Introduction to Etrieve

Instructional Technology & Web Services

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For clarification, Etrieve is the product we use that is made by Softdocs.

- To find the link to Etrieve, you will need to be sure and log in to the EWU portal page, inside.ewu.edu. If the link at the upper right of the page reads "login," please click it and go through the login process. If it reads "logout," as in the screenshot below, you are already logged in and can move to the next step.

Clicking on A-Z services will present a "fly out" panel from the right, listing all EWU services.
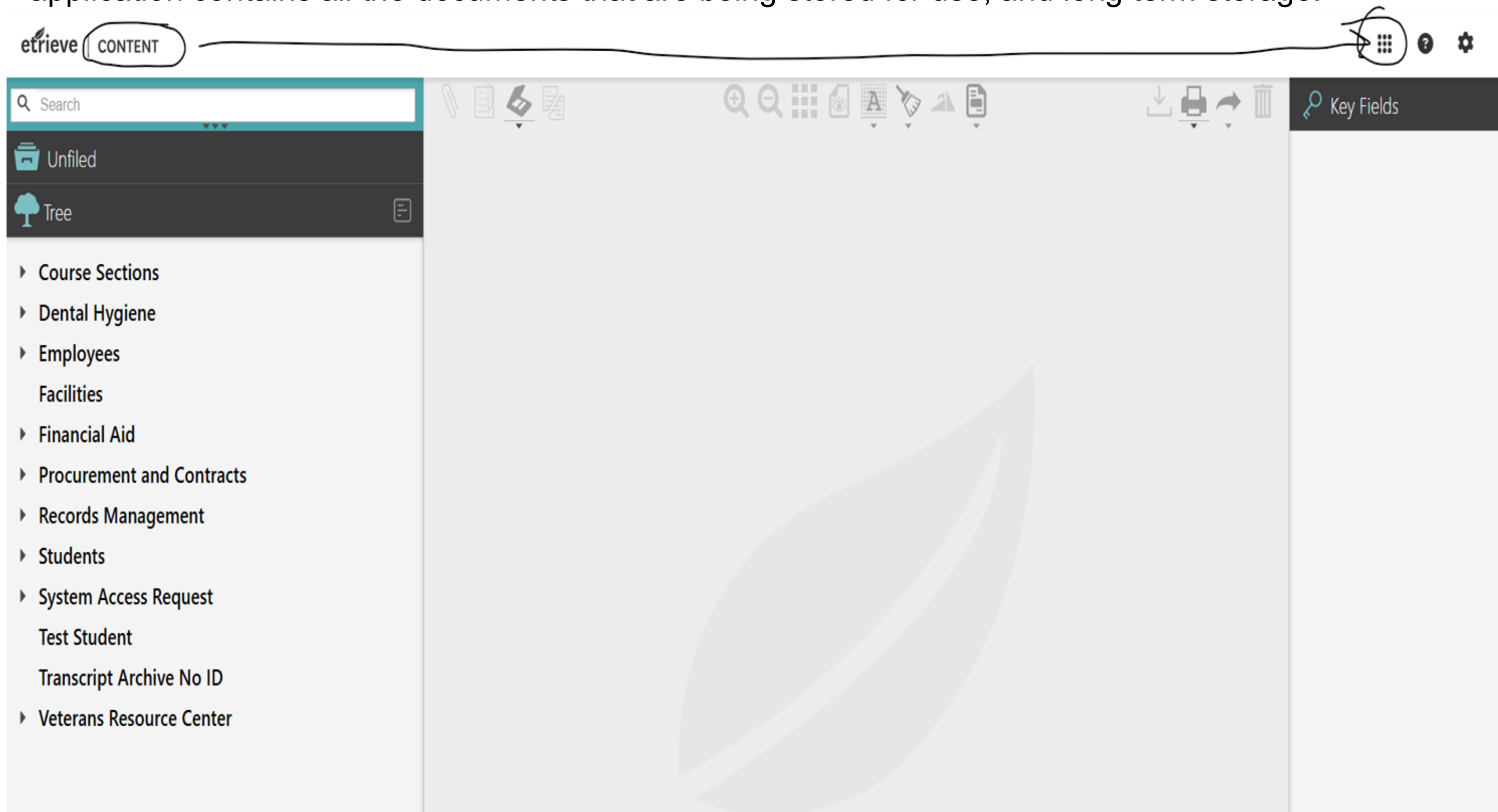
Depending on what level of permissions you have within the Etrieve Application, will depend on what you can do and see next. The link within A-Z sends users directly to Etrieve Content. This area within the application contains all the documents that are being stored for use, and long term storage.

etrieve CONTENT

Q Search

Unfiled

Tree

▸ Course Sections

▸ Dental Hygiene

▸ Employees

Facilities

▸ Financial Aid

▸ Procurement and Contracts

▸ Records Management

▸ Students

▸ System Access Request

Test Student

Transcript Archive No ID

▸ Veterans Resource Center

Key Fields

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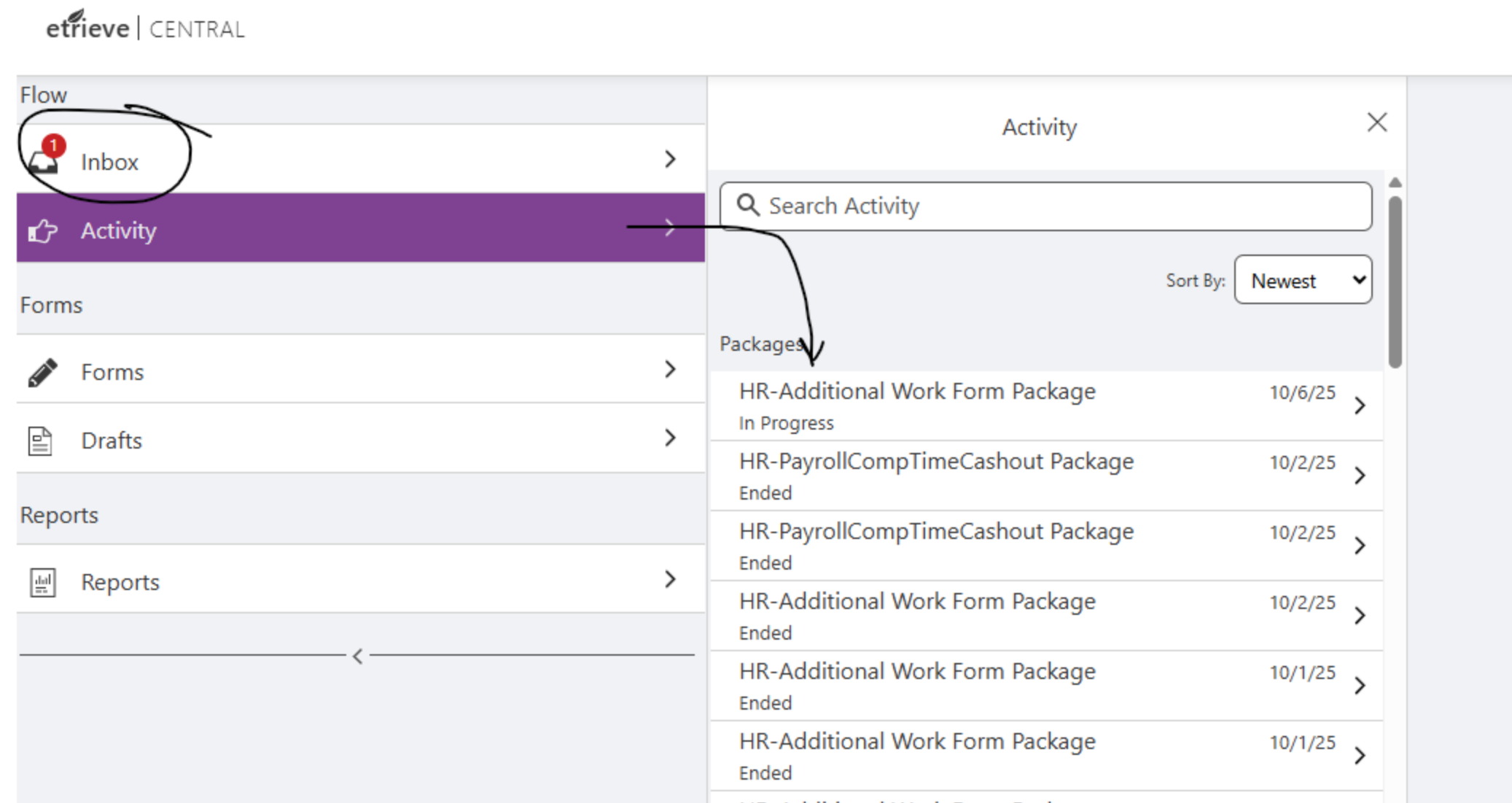In the upper right on the Content page, you will see nine dots arranged in a square. Clicking on this will give you options, again, based on your level of access.

Central   Content   Security

Most commonly, specific areas within Central and Content will be available to users. In some cases, users may only have access to particular forms within Central, but not the whole of Central itself. Forms will be linked from departmental web pages that need to utilize them. For Example, Human Resources.

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Once in Central, you will see this page (below):

- The menu on the left will vary with permission levels.
- If you have permissions that show an inbox, this means you are in a group that needs to interact with forms that are passing through workflows.
- **This is a group inbox however, and every form you see in this inbox will not always be yours to approve**
- The best way to check this, is to select the Activity option, and glance at the form to ensure it is one that is yours to act upon.
- Additionally, if you've been requested to act on or approve a form, you will get an official notification within your Outlook email, with a link, that should take you directly to the form in question.

To see what forms you may have access to, select "Forms." in Central (below):

Once you've been linked to a form to fill out, it will look like this on the right pane, or in the center of the screen, depending on the link sent. Either way, it is the same form. As can be seen below, the "submit" button is at the bottom left, outside of the form itself.

Once submitted, it will go through the associated Workflow for processing, and completion. You will receive emails as to its progress while this process is under way

Contact Information

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