# SoftDocs Training

SoftDocs is a program that we're using at Farmingdale to manage process workflow and forms. This is just a quick primer on how to use the software in order to familiarize you with the process a little better.

First, to access the system, you'll want to go to the site and login. You can find the site at:

http://forms.farmingdale.edu

While you can use any browser to access this, it's recommended to use Google Chrome as we've found certain features don't work as well or at all in other browsers.
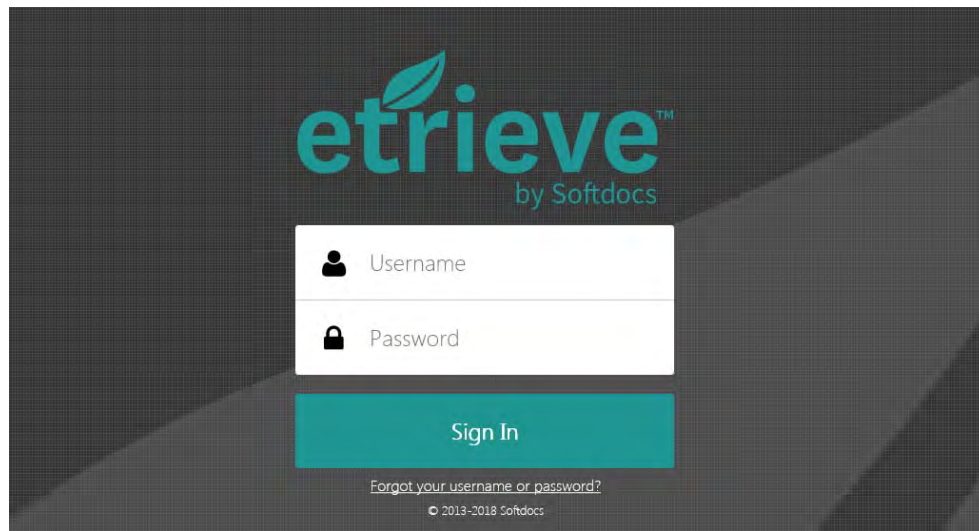

Here, you'll login with your Farmingdale Active Directory account (your email without the @farmingdale.edu at the end) and the same password as you use for your email.

You'll be presented with your home screen for SoftDocs.

In the example, you can see a small red '3' over my "Inbox". What this means is that I have 3 items waiting for me in my Inbox. If you've logged into the system specifically to approve something, this is there you're going to want to click.
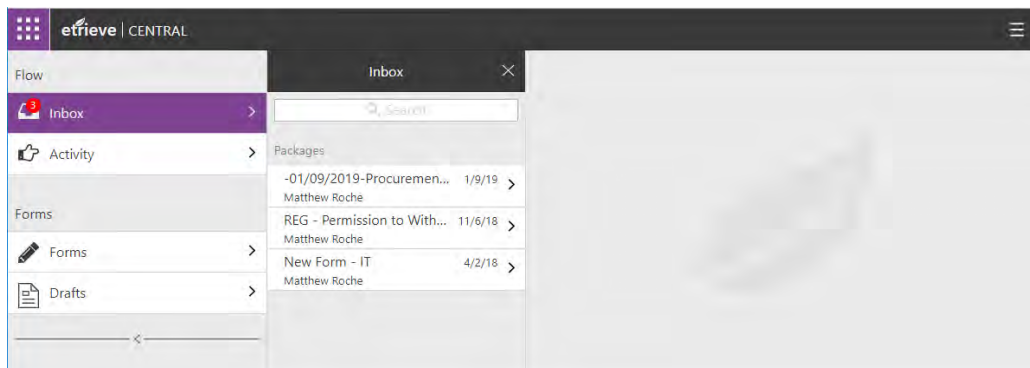

When I clicked on Inbox, the center column populates with 3 items. These are the 3 items or "Packages" in my mailbox.

The top line of each package is the title of that individual package. To the right side, each package will have a date for when it was last worked on. And on the bottom line of each package, you'll see the person who previously performed any activity on the package such as an approval or package creation.

When you know which package you want to look at, click on the '>' at the right-size of the package.
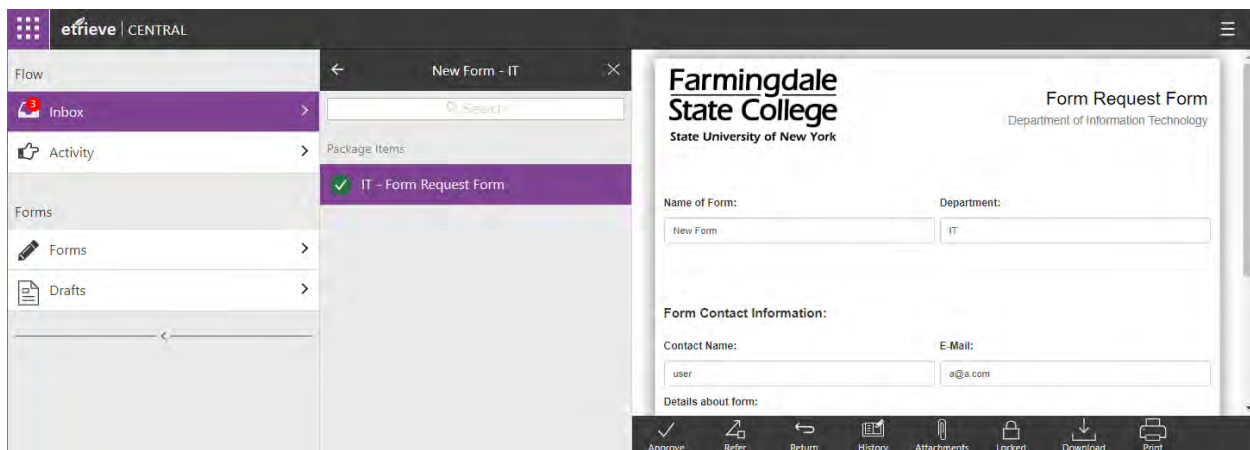
And there we have a form. Filling out the form is pretty straightforward. Just enter what you need in the box and if you're approving, you can take a look at the form beforehand. The more complicated part of the system comes in at the bottom of the form:
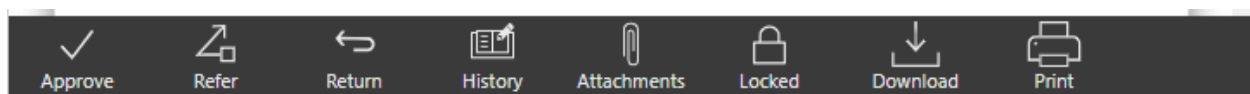
Each of these buttons does something different and can be confusing or problematic if used at the wrong time, so we're going to break each button down one at a time:

- Approve – This button is the first button in the list because it's the most important. This will sometimes be called Submit or Submit To:. We'll cover "Submit To" in a bit. As an Approve/Submit button, what it means is that it'll move the form to the next person in the
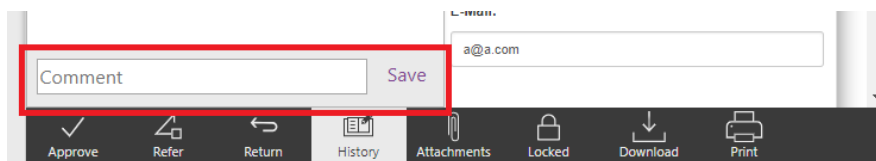
workflow. The difference between Submit and Approve is that if you're the person that created the document (called the "originator"), it'll be a Submit. Otherwise, it's identical to Approve.

"Submit To:" is the button that will be here when you have a form that needs to be routed to someone who can't be programmatically defined in the workflow. For example, some departments will have some forms filled out by a secretary on behalf of a requestor and other times they'll be filled out by the requestor. There's no way to know at a form level who should approve the document or how many approval steps there are. To handle this, we use "Dynamic Routing". What this does is it allows the person at that step to decide who to route their document to as they should know who needs to approve next in the workflow.

- Refer – This one is a little trickier. The Refer button sends the document to someone who you want to show the document to without them being part of the permanent workflow. So if you need advice from someone before you click "Submit", you can send it with Refer to someone else and it'll drop into their SoftDocs inbox and will stay there until it's approved by the person you referred it to. This might seem a little confusing, but when a document has been referred to you, to send it back you **MUST** approve it for them to get it back.

  This can be confusing because another logical way to send it back to them would be to refer it back to them. If you do that however, the system will assume that this is a fresh referral and will send the document to the original person and be waiting for an approval… and when that's approved, it'll go back to you! So to break out of the referral loop, you need to approve the document to send it back to the normal workflow.

- Return – Returning is just how it sounds. You return the document to a previous submitter/approver. Most people will immediately say "But how do I provide a reason for the return here? It just disappeared after I specified who to return it to". That's because SoftDocs expects you to enter your comments on the document directly into your history. To do that, we need to look at…

- History - This is where you enter comments and view the document's history. So you'll want to click this before you click the "Return" button in most situations. Clicking on the "History" button, you'll usually get something like this:

In the box at the bottom labeled "Comment", you simply type your comment and click on "Save". When you do, the comment should appear in your history (colored with a gray background) along with a timestamp of when the comment was made and who made the comment.

In addition to comments, you'll see any approvals/referrals/receipts of messages in this section, listed in chronological order from top to bottom with everything but comments colored in purple.

- Attachments – These are the attachments that were provided to the document. There are a variety of file types that can be used with a SoftDocs form and they can either be attached to the form with this button or downloaded from this button if they've already been attached. This button is just a way of linking a document that's external to SoftDocs to a form and provides a way of storing these documents.

- Locked/Unlocked – The Locked button will be called either Locked or Unlocked. Typically, as soon as you bring up a form, it will lock the form to you and the button will say "Locked". However, if there's someone else in your approving group that you want to do the approving, you can click the "Locked" button and it will become "Unlocked". At that point, someone else in your group can login and take control of the document. Each document can only have one person locking the document at a time. This is to prevent one person approving a document while another person denies or holds up the same approval. If there's a document that you're trying to approve and you're told that the document is already locked, if you take a look at the history tab, it should tell you who the last person was who looked at the document and this will likely tell you who has the document locked. If that fails or if someone has the document locked and they're unavailable, if you contact IT, they will also be able to tell you who has the document locked and can unlock it if necessary.

- Download – This downloads the form as a static document. When you click on this, it will take the information in the form and workflow and compile it into a PDF that contains the basic shape of the form and will append the document history to the end of the document. It should also append any PDF attachments that may be part of the workflow to the final PDF and will save it to your local workstation.

- Print – This is the same as Download, but instead will send it to a printer.

With that all covered, the rest of the home screen works as follows:

- Activity – When you click on the "Activity" tab, you'll get a listing of any previous documents you've worked on. This would include if you were the originator or an approver at any stage of the document's workflow. On the right-hand side of the document selector, there will be a date listed for when it was last worked on and on the bottom, it will tell you what stage of workflow the document is in (In Progress, Ended, etc).

- Forms – Clicking on this tab will take you to the forms that available for you to originate. If you want to submit a new form. This is where you go. Forms are typically broken down into groups sorted by the area of who handles them with an up to 3-character code (REG for Registrar, PUR for Purchasing, IT for IT, etc). Clicking on the form you want will generate a new form in the right-hand pane that you would fill out and eventually submit to send along its way.

- Drafts – Self-explanatory. These are draft versions of forms that you've started in the past. For most people, this will be empty.

That should cover most of the functionality of the system. If you have any questions on how to use the system or need a form to be created, please contact IT in order to get the issue resolved.