



Access and Submit Forms in Etrieve Central

This document is intended to be used by Walsh University students, staff, and faculty members to utilize Walsh E-Forms.

Directions

- 1) Access [Etrieve Central \(https://walshcentral.etrieve.cloud/\)](https://walshcentral.etrieve.cloud/)
- 2) If you are not signed into your account, you will need to login using your single sign-on credentials

Login using the following information:

Email: Walsh Email

Password: Single Sign-On Password



Sign in

Email, phone, or Skype

[Can't access your account?](#)

Back

Next

If you need login or password assistance, Walsh University Help Desk support is available 24/7 by calling (330) 244-4357 or emailing helpdesk@walsh.edu.



Enter password

Password

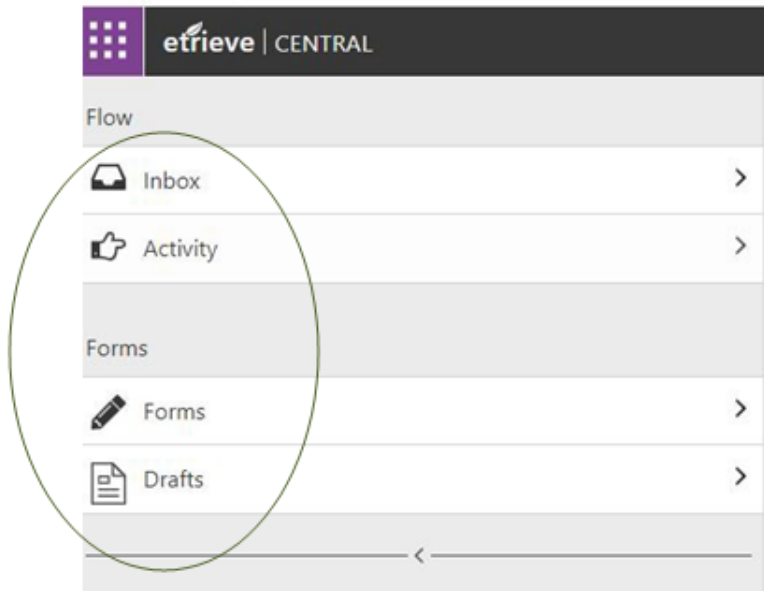
[Forgot my password](#)

Sign in

If you need login or password assistance, Walsh University Help Desk support is available 24/7 by calling (330) 244-4357 or emailing helpdesk@walsh.edu.

3) Once logged in, you will see the etrieve Central dashboard:

**Explanations of tabs below*



*NOTE: The primary navigation panel is located on the left-hand side of the page and consists of *Flow* and *Forms*, with sub-panels that the following options; Inbox, Activity, Forms, and Drafts.

Inbox – area where users can see items waiting to be reviewed and approved. A number will appear in the box when you have items waiting.

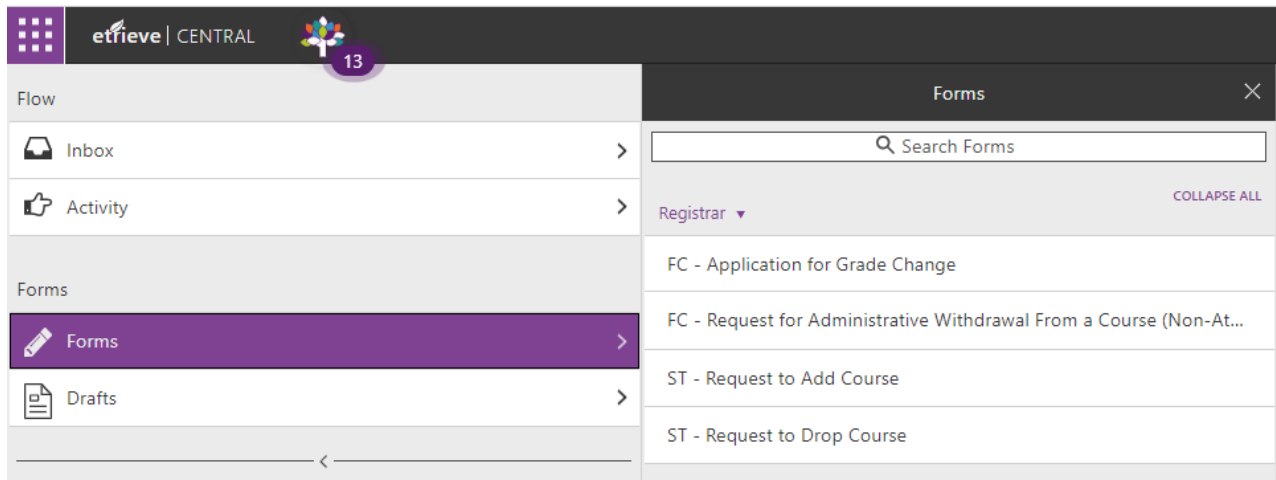
Activity – area where a user can review their form’s activity

Forms – area where you can locate and submit available forms

Drafts – area where forms are saved until submitted by the use

4) Click “Forms”-The window will expand to list the forms you have access to.

***Explanation of forms set-up below*



****NOTE:** When viewing available forms, you will see that they are divided into their respective departments/groups (EX: The “Registrar” group houses all forms that are handled by the Office of the Registrar)

5) Click the form you want to submit and the form will populate on the right- hand side of the screen. *See example below*

WALSH UNIVERSITY Request to Add a Course
EDUCATION FOR LIFE

All Athletes:
This Add Course must meet NCAA compliance regulations of maintaining full-time enrollment.

All Students:
Your enrollment at the University creates an implied contract for payment of tuition and fees. If you choose not to attend the University, you must officially withdraw from all courses within the first week of classes or you must pay all charges in full. I understand that should my student account become delinquent in excess of 150 days, Walsh University has the right to forward my account to a collection agency, and I will be responsible for all related collection costs of approximately 35%.

Date:
02/22/2023

Student Information

First Name: [Redacted] Last Name: [Redacted] Student ID: [Redacted]

Add Course Information

A \$10 Add/Drop Fee will be assessed for ALL changes in registration processed after the last day to drop with a refund.

Select Semester: [Dropdown]

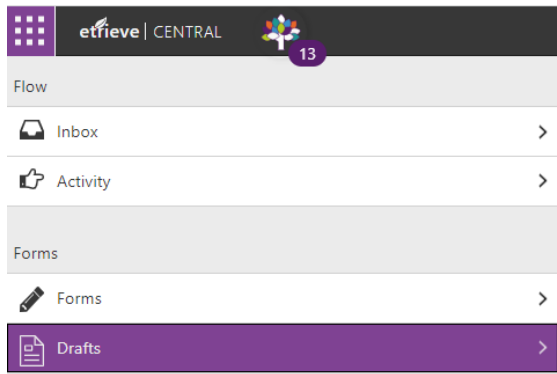
Course Information: [Select a course] Credits: [Input]

Add Course [Total Credits: 0]

Your name and ID will be auto-populated for you.

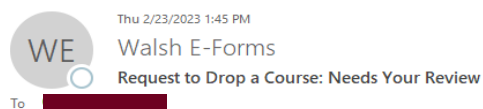
Fill out the form by completing the required fields on the form and adding any additional information that is needed.

The form automatically saves as you work. Click “Drafts” on the dashboard to view any documents previously started to continue filling out if applicable.



6) Once the form has been completed and required fields have been filled out, you will be able to submit your form using the submit button found towards the bottom of the page.

7) If the form being submitted requires you to have a role within the form's approval review process, you will receive an email notification letting you know that you have a form to review.



Hello,

The workflow package [redacted] has been submitted by [redacted] and is available for your review.

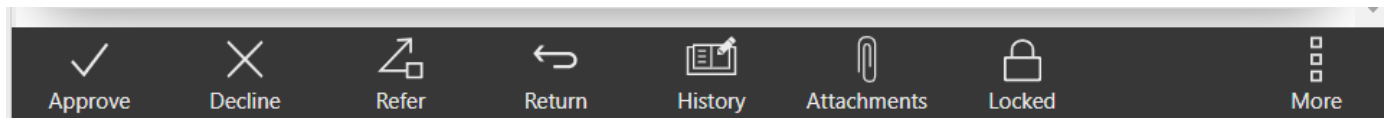
To access it, please [click here](#).

Sincerely,
The Office of the Registrar
Walsh University
Farrell Hall 101
registrar@walsh.edu
330-490-7367



You can either click on the "click here" link within the email, or you can go to your inbox on the retrieve Central dashboard when you first login.

8) When you open the form, you will be able to review the information filled out and submitted by the initiator of the form. At the bottom of the page you will have many, if not all, of the options below to choose from.



NOTE: If you are involved in the "workflow" of a form, you will likely see the options above to choose from. See explanations below.

Approve - This button is to be used when approving a request. The form will continue on in the workflow/review process.

Decline - To be used when a request is being denied. The form will not continue on in the workflow/review process and the form's originator will be notified.

***Refer** - This is used when the reviewer of a form requires feedback from another individual before a decision is made. Once the form is reviewed by individual it was referred to, it will return to the individual who referred the form so he/she can make their decision. *USED BY FACULTY/STAFF ONLY

Return - Returns the form to the previous step/reviewer in the workflow.

History
CLOSE

Package History

Audit History

02-23-2023, 12:44:26 pm

Submitted 'ST - Request to Drop Course'

02-23-2023, 12:44:44 pm

Received

Comment

+ Add Comment

Save Comment

***History** - To be used by reviewers to leave a comment to be included with the form. Keep in mind that all comments can be reviewed by the Office of the Registrar and/or the form's manager. ***FACULTY/STAFF SHOULD INCLUDE ANY COMMENTS EXPLAINING THE REASON FOR THEIR DECISION, EVEN IF THE FORM ITSELF INCLUDES SPACE FOR A REASON.**

Attachments - This is used to attach any documents that the form's originator would like to include for the form's review process. Note: some forms require 1 or more attachments.

Locked - Indicates whether or not the form is locked by another user.