Frevvo E-Business Forms Procedures

Basic Navigation

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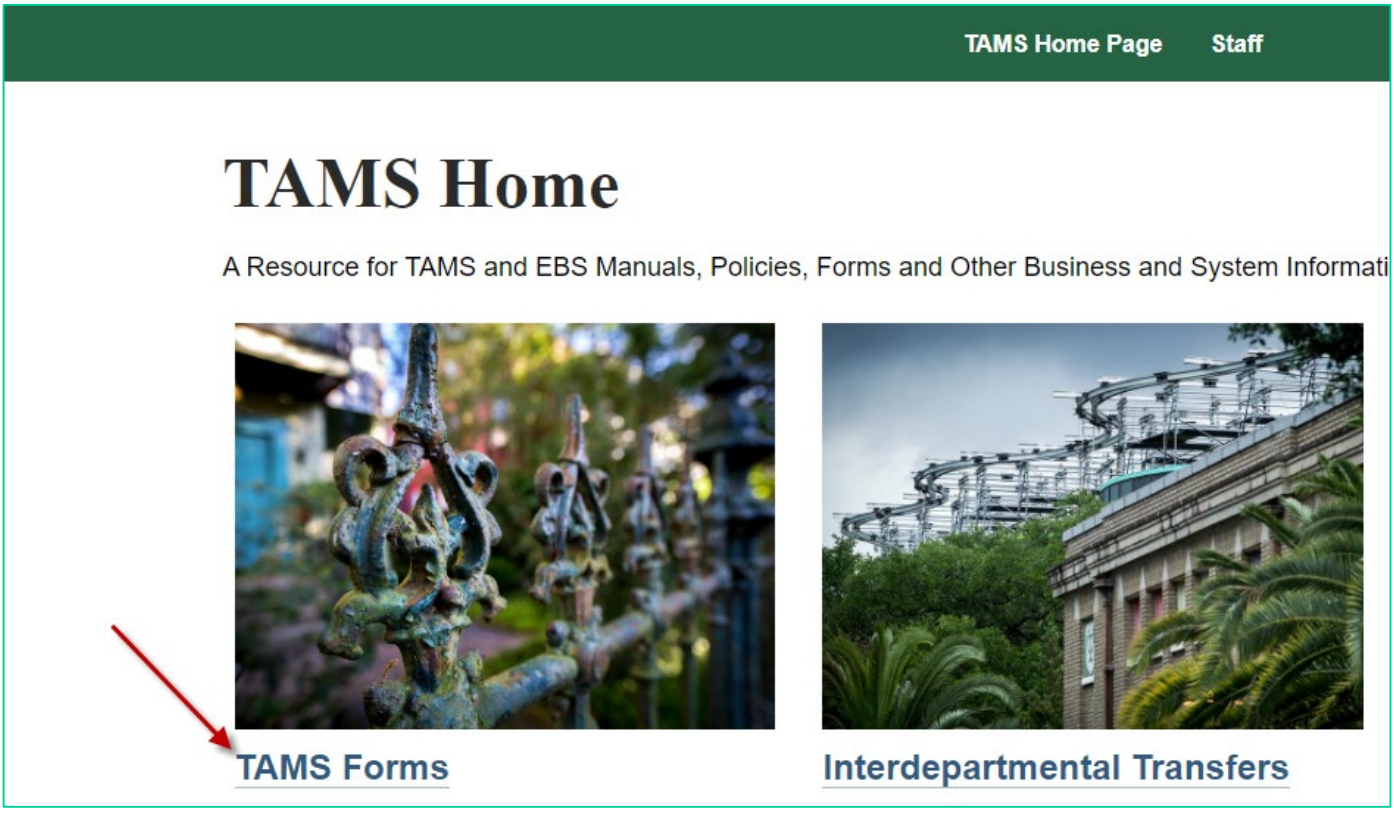
Key Points:

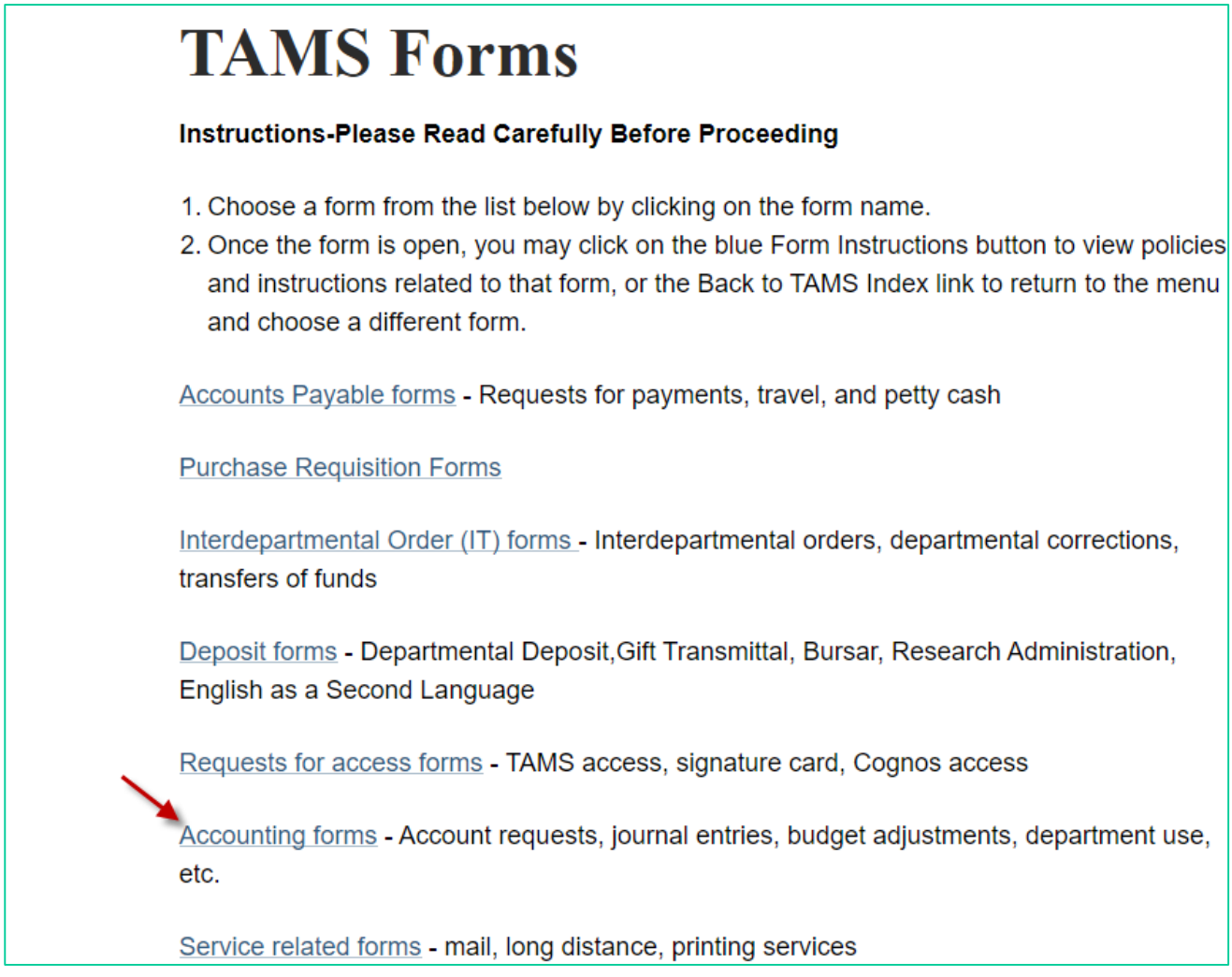
- The Frevvo electronic business forms are located on the TAMS Index under the TAMS Forms tab
- You do not need to request access to use these forms
  - If you are not already logged into the Tulane network when you open a Frevvo form, you will be prompted to include your Tulane user ID and password
- The submitted form routes electronically for approvals based on the authorized approver you list on the form and the campus or school you choose, if applicable
  - You must use the approver's Tulane email address (@tulane.edu)
- Once the form completes the workflow process, the initiator will receive an email with an attached pdf version of the form showing all approvals

Initiating a Form – Forms Location



- Go to the TAMS Index (https://tams.tulane.edu/) and click the TAMS Forms link

Initiating a Form – Forms Location



TAMS Forms

Instructions-Please Read Carefully Before Proceeding

1. Choose a form from the list below by clicking on the form name.
2. Once the form is open, you may click on the blue Form Instructions button to view policies and instructions related to that form, or the Back to TAMS Index link to return to the menu and choose a different form.

Accounts Payable forms - Requests for payments, travel, and petty cash

Purchase Requisition Forms

Interdepartmental Order (IT) forms - Interdepartmental orders, departmental corrections, transfers of funds

Deposit forms - Departmental Deposit,Gift Transmittal, Bursar, Research Administration, English as a Second Language

Requests for access forms - TAMS access, signature card, Cognos access

Accounting forms - Account requests, journal entries, budget adjustments, department use, etc.

Service related forms - mail, long distance, printing services

- When the TAMS Forms page opens, go to *Accounting forms* and click the link name of the form you would like to initiate
  - NOTE: Not all forms have been converted to the new Frevvo electronic versions at this time; complete and route the legacy pdf forms as you normally would
  - If you are not already logged into the Tulane network when opening a Frevvo form, you may be prompted to log in using your Tulane credentials
- For the following basic navigational procedures, we will use the New/Modify Organization Form as an example

Initiating a Form - Form Example

Tulane University

NEW/MODIFY ORGANIZATION REQUEST FORM

Organization Form Request

- (•) New Organization
- ( ) Modify Organization

Date of Request: 10/11/2020

Requestor's Tulane Email Address: psimons@tulane.edu

Requestor's First Name: Peter

Requestor's Last Name: Simonson

Requested on Behalf of (if applicable)

First Name | **Last Name** | **Tulane Email Address**

Requesting School/Division

Justification for New Org

New Organization

Org Name | **School/Division Org Rolls to** | **Org Chair/Department Head**

Will payroll be charged to this organization?

- ( ) Yes
- ( ) No

Will existing accounts be transferred to this organization?

- ( ) Yes - Note: Grants cannot be transferred from their original organizations.
- ( ) No

Will grants (5##### accounts) roll up to this organization?

- ( ) Yes
- ( ) No

Does Any Org Involved belong to the School of Medicine?

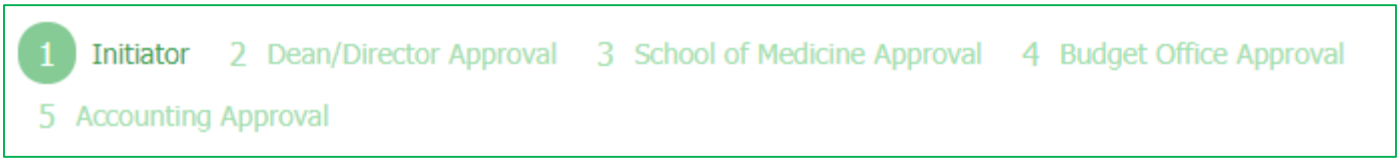
- ( ) Yes
- ( ) No

Please complete the below information for the Dean/Director associated with this request.

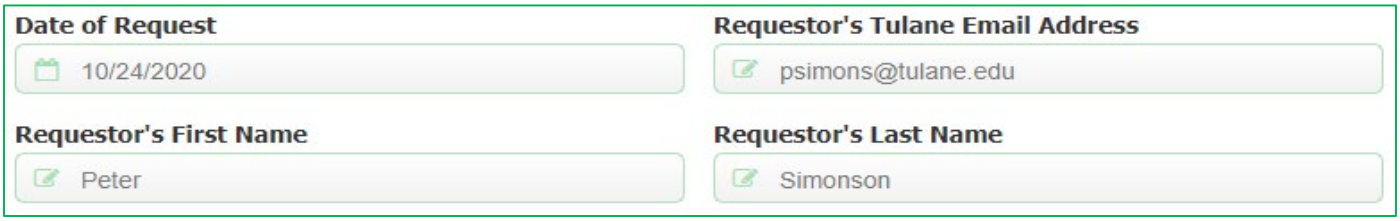
Dean/Director First Name | Dean/Director Last Name | Dean/Director Tulane Email

Submit for Dean/Director Approval

Initiating a Form – Completing the Form

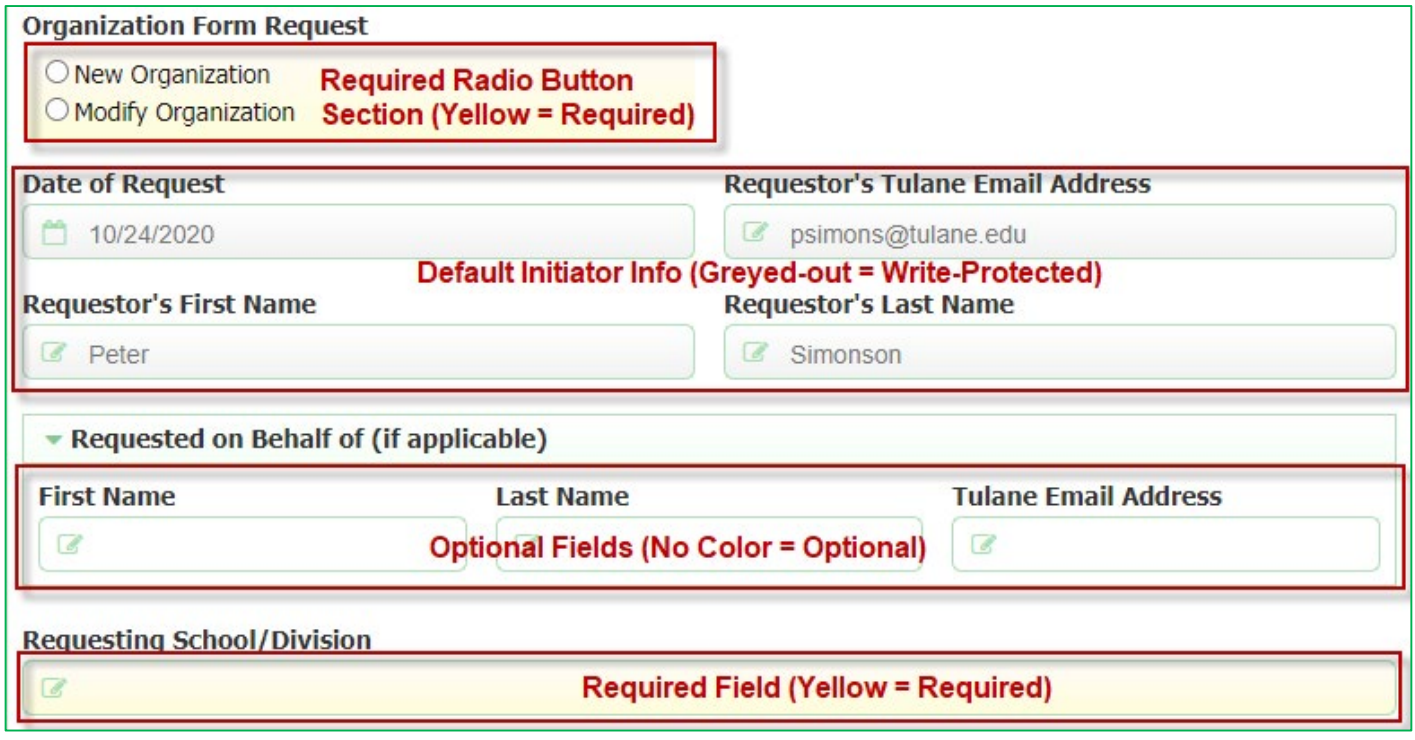


- At the top of the form is a list displaying the workflow steps in sequential order for the form that you have open
  - The workflow steps can be different depending on the business form
  - The highlighted workflow number indicates the current workflow step



- Your name, email address and date of request will default on the form
  - This information is write-protected and cannot be edited

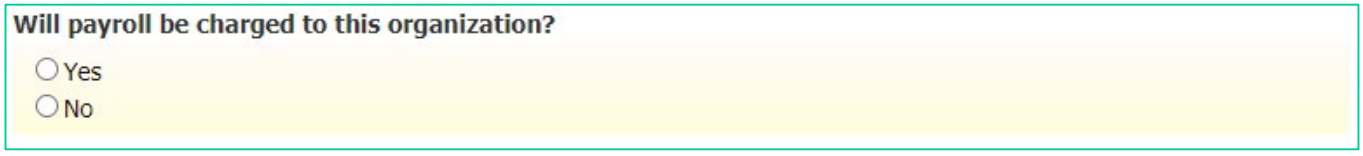
Initiating a Form – Completing the Form



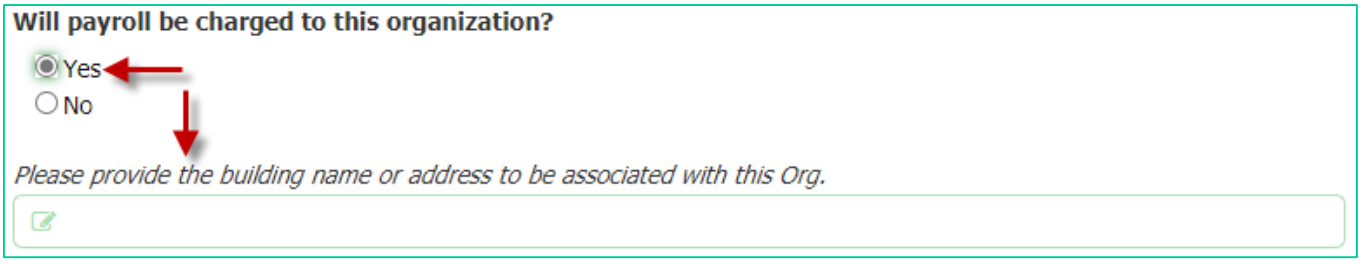
- Yellow fields and yellow radio button sections are required
- Greyed out fields contain default information and are write-protected
- Unshaded fields are optional
- Tulane Email Address fields are validated by a Tulane database

Initiating a Form – Completing the Form

Radio Button Section: Yellow section = required



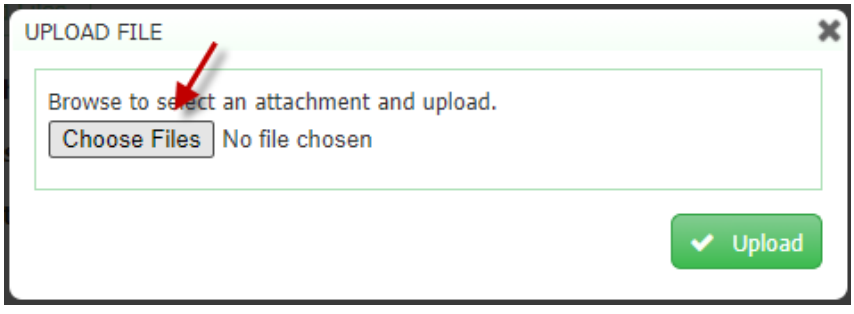
Radio Button Section: Selecting 'Yes' may open another field requiring further information



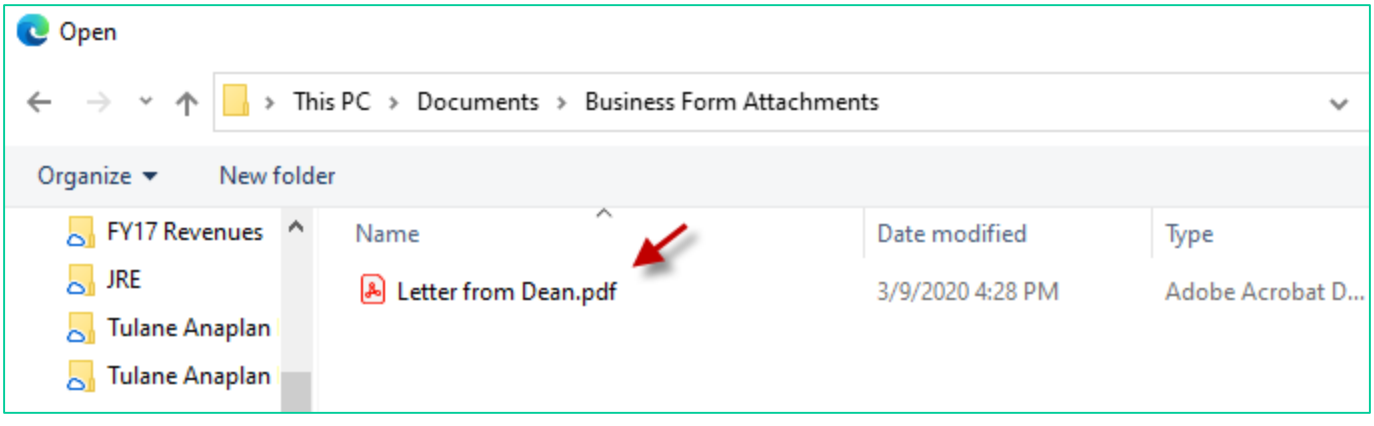
- For this example, notice the radio button section is yellow indicating a required response
- Depending on your response, a new field may open requiring you to include additional information
  - In this example, Yes was chosen requiring you to complete an additional field

Initiating a Form – Completing the Form (Adding Attachment)

- To add an attachment, click the Add Files button
  - Not all forms give the option to add an attachment

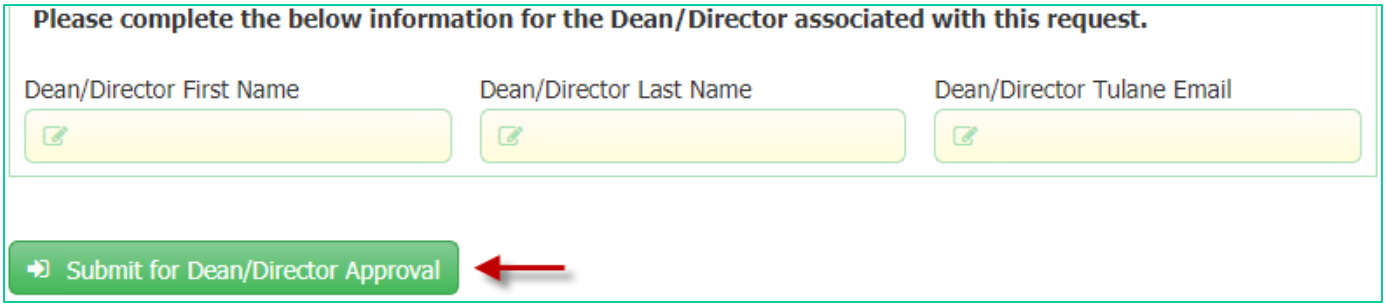


- Click the Choose Files button to open your File Explorer



- Double-click the file that you would like to attach to your form, then click the Upload button

Initiating a Form – Submitting the Form

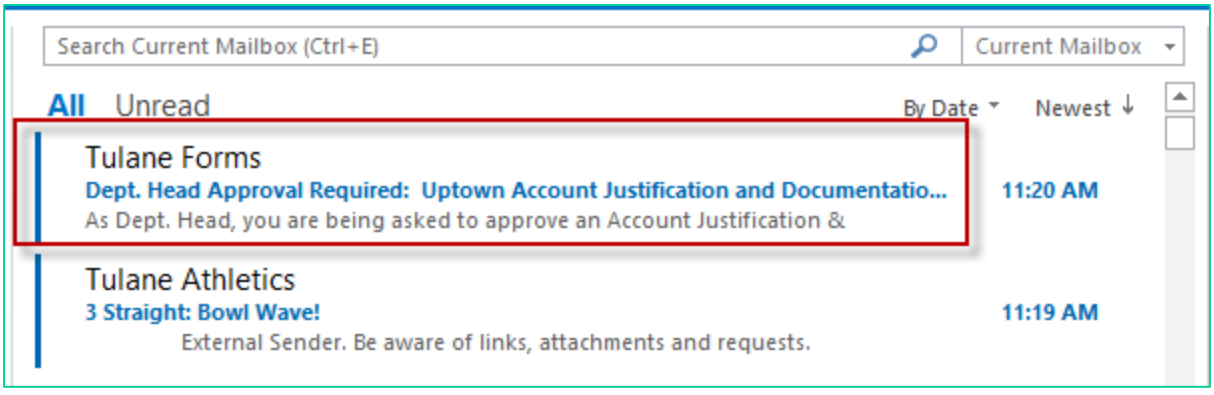


- Include the first name, last name and email address of your organization's authorized approver
  - If you are the requestor and also the authorized approver for your org, you should include your name and email address in these fields
  - An approval request email notification with a link to the form will be sent to the approver's email address that you include in the Tulane Email field (This field is validated by a Tulane database)
- Once you click the Submit button, the form will begin to move through the approval workflow process
- The workflow sequence is:

  Requestor ⇨ *Org Approver(s) ⇨ Administrative Approvals ⇨ Final Processing

  **Some forms may require multiple org approvers depending on the business purpose*
- Once the form is submitted, it cannot be edited unless it is returned to the initiator by one of the approvers

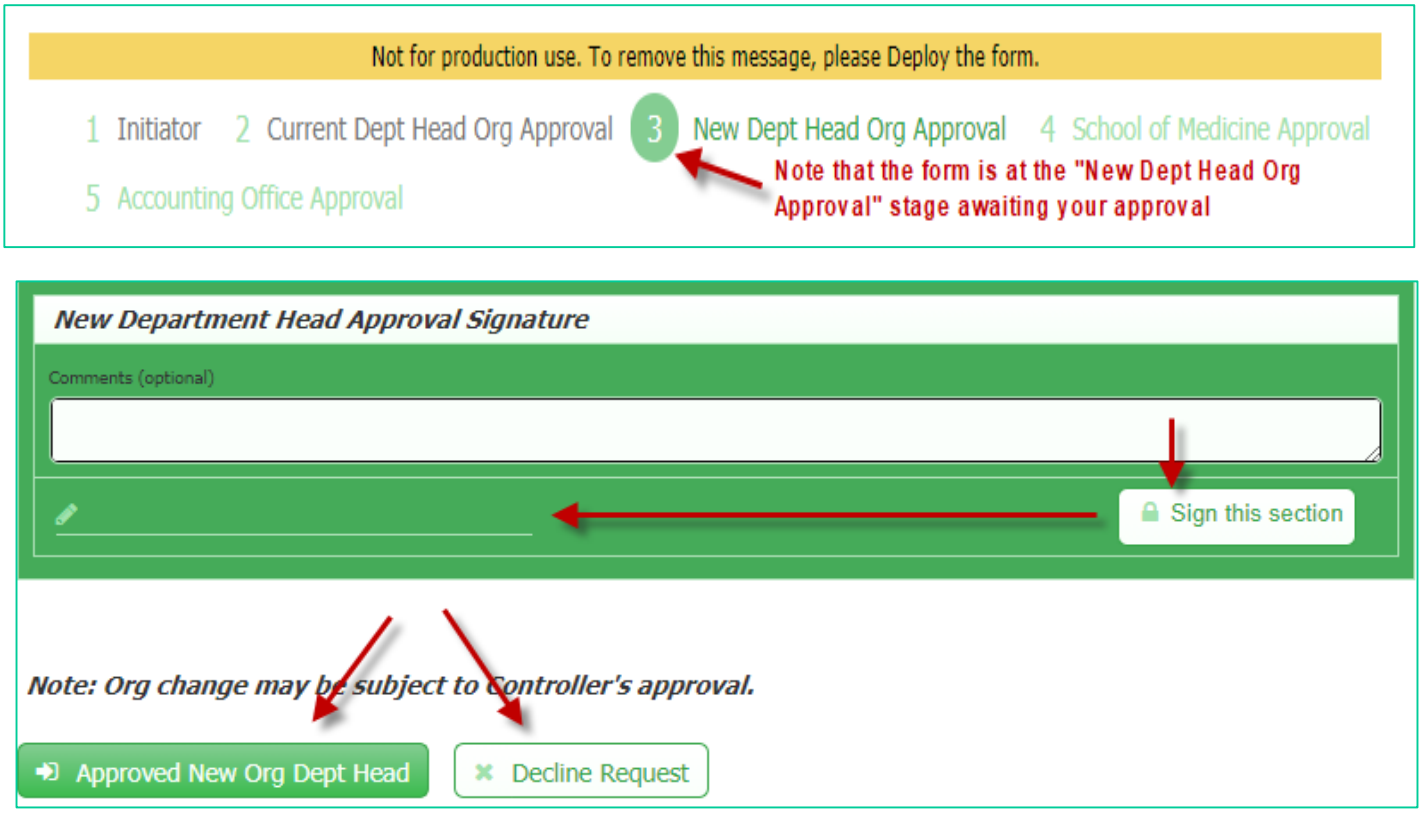
Approver – Email Approval Notification



- If you have been designated as an approver of a form, you will receive an email notification containing a link to the form once the form is ready for your approval
  - The form should be approved as soon as possible to release it to the next stage of the workflow

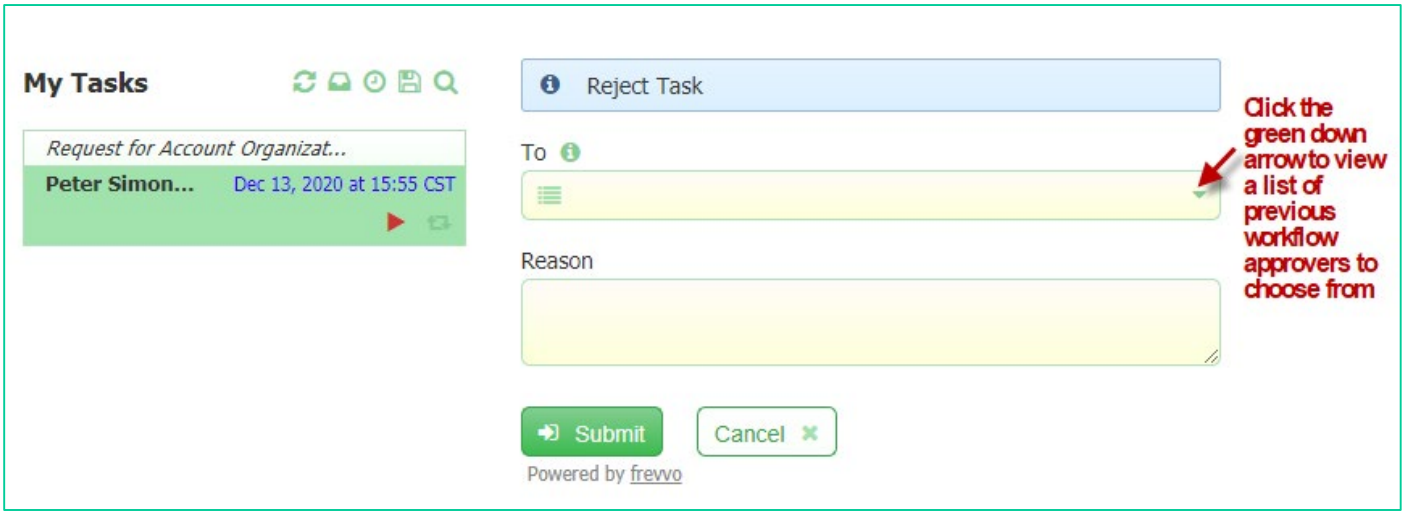
- Click the embedded link to open the form
- See pages 13 and 14 for instructions to approve or reject (decline) a form

Approver – Approving a Form



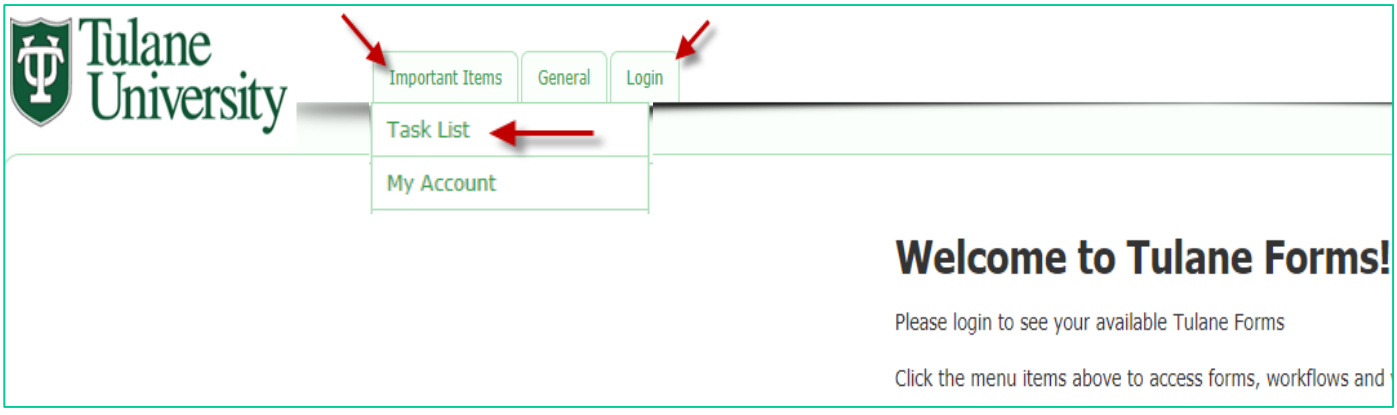
- If a form is awaiting your approval, you will be notified via an email with a link to the form; click the link to open the form
- Note the workflow stage at the top of the form; in this example, the form is awaiting approval from the “New Dept Head”
- Scroll down the form until you see the appropriate section to approve and click the “Sign this section” button to automatically populate your name and date in the Signature field
- Click the Approved button to move the form to the next workflow step, or
- Click Decline Request to return the form to anyone in the previous workflow (See next page)

Approver – Rejecting a Form



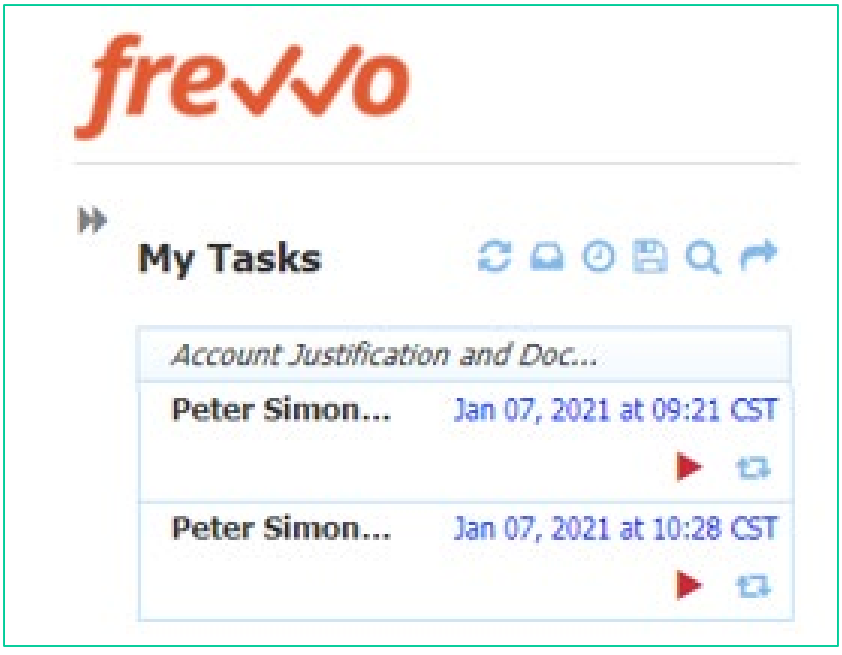
- If you click on the Decline Request button, a screen will open that requires you to choose to whom you'd like to return the form
  - Click the Down Arrow on the "To" field to view a list of valid workflow participants (initiator/approvers) from which you can choose
  - Please note that only the initiator of the form can make any changes to the form; if you choose to reject the form to a past approver, that person can then reject the form to the initiator if any changes are required
- Include a reason for the rejection in the required "Reason" field
- Click the Submit button
- Once the person to whom you returned the form re-submits the form, it will repeat the workflow steps from that stage

Approver – Checking All Pending Approval Requests



- If you are an approver and would like to view all requests awaiting your approval, you can go to Tulane Forms at: https://forms.tulane.edu
- If you are not logged into the Tulane network, you will need to click the Login tab to log in
- Click the Important Items tab, then Task List, to view all forms that are awaiting your approval

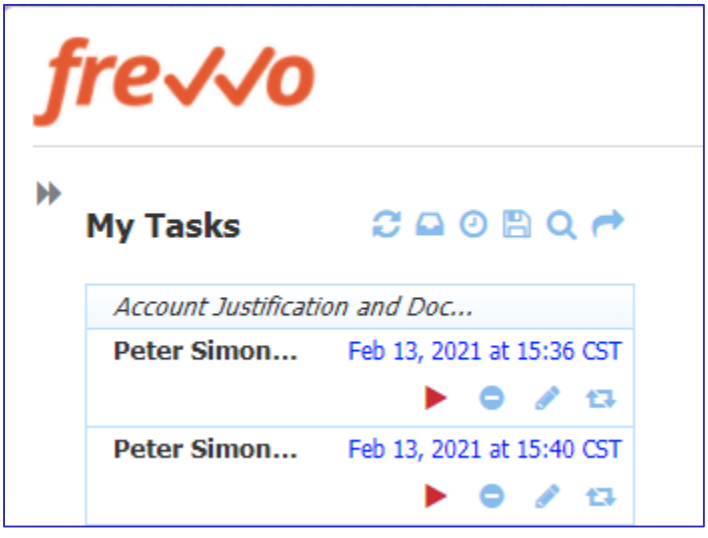
Approver – Checking All Pending Approval Requests



- Any form awaiting your approval will show up in a list
- Click the red “play button” ▶ to open the form to approve or reject it (Follow the approval steps as shown on pages 12 - 13)
- Click the “rotating arrow” icon ⟳ to view the audit trail of the form

Administrative Group Approvers

- Health Science Center Dean's Office
- School of Public Health and Tropical Medicine Dean's Office
- Budget Office
- Financial Services
- Accounting Office



- If you are an approver in one of the approval groups listed above, instead of an email notification with a link taking you directly to the form awaiting your approval, you will receive an email notification with a link to your My Task list that shows all forms awaiting your approval
  - You may be prompted to log in with your Tulane credentials
  - Forms awaiting your approval will be identified by a red triangle (play button)
- Click the red play button to open the form to either approve or reject it (see pages 13 and 14)

Special Instructions - Administrative Group Approvers (HSC Dean, SPHTM Dean, Budget Office, Financial Services, Accounting Office)

IMPORTANT NOTE: Please be aware that once a form is approved by someone in your group, the form will no longer be available if you try to open it from your notification email after the initial approval

If you open a form and DO NOT either approve or reject it, you must Log Out (and not "X" out of the screen) before any of the other approvers in your group can open the form