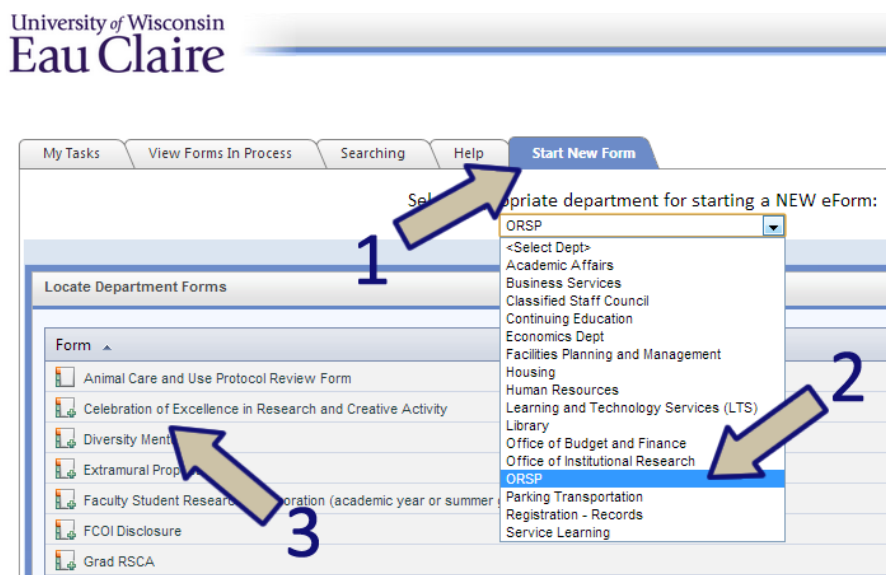


# BP Logix eForm Tip Sheet

## Starting a Form:

In order to start a new form, you will need to use your universal university username and password to login to BP Logix at <https://eform1.uwec.edu>. Once logged into BP Logix, you will need to:

1. Select the “Start New Form” tab.
2. Select an appropriate department from the pull-down.
3. Click the appropriate form from the list of available forms for your chosen department.



A pop-up will ask “Are you sure you want to start this process?” After clicking “OK, BP Logix may take a moment to load. Once BP Logix has finished loading, the form will pop-up in a new window. If you followed the steps above and your form did not automatically open, it may be available under your “My Tasks” tab.

## Multiple forms:

If you keep opening forms from the 'Start New Form' tab, you will have several duplicate forms. Try to avoid this as deleting multiple forms can be tedious.

## Delete a form:

You may delete duplicate forms by opening a started form under 'My Tasks' and clicking the button at the bottom "Delete Form and Workflow":



## Fill in all required fields:

All fields in red must be filled-in, e.g. Student or Faculty Classification, and Department Chair.





## Using the “User Chooser” or button:

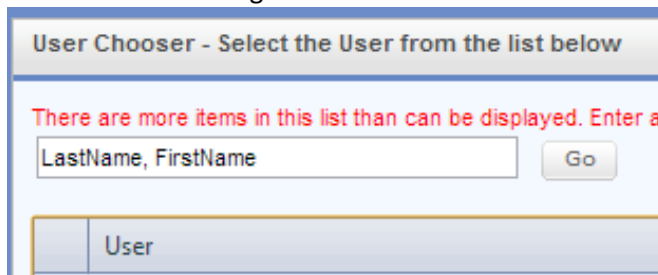
In fields that require you to select a UWEC faculty or student, you will need to use the “...” button. For example, the following field in the “IRB Initial Form Submission” form requires you to use the “...” button:

**Faculty Mentor**

Name

  
 **Select**

1. Click .
2. The “User Chooser” window will pop-up.
3. Type the name of the student or faculty and hit “Go”. If you are searching by last name and first name, you will need to type the last name first, followed by the first name, and separated by a comma. Tip: If a name is not found in a search, try typing only a part of the name or their email address and search again.



User Chooser - Select the User from the list below

There are more items in this list than can be displayed. Enter a

User
------

4. After BP Logix is done searching, you can select the pertinent faculty or staff member. Once you select the name, BP Logix will automatically fill in their details.

## Saving a form to edit later:

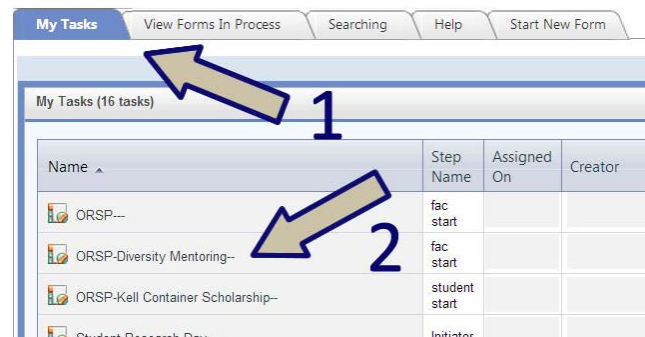
You may save a form and continue filling it out later. To do so, please click “Save and Close for Later” at the bottom of the page.



## Opening a saved form:

To open a saved form:

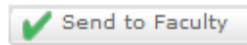
- 1) Click on your “My Tasks” tab.
- 2) Choose the appropriate saved form from the list.
- 3) Your form will open in a new browser window.



Name	Step Name	Assigned On	Creator
ORSP--	fac start		
ORSP-Diversity Mentoring--	fac start		
ORSP-Kell Container Scholarship--	student start		
Student Research Day--	Initiator		

## Submitting your form:

You will need to send the form to the next person on the routing order. Who you will need to submit to varies from form to form. Click the appropriate button at the bottom of the form to submit. For example, at the bottom of the CERCA form, you will need to click “Send to Faculty”:



**Do not close the browser window yet!**

## The LOADING image:



Once you send a form to the next person in the routing order, **you must wait for BP Logix to finish loading**. Many people who have problems with forms don't wait for BP Logix to finish loading. While loading, a loading icon (pictured left) will appear at the top of your form. When BP Logix has finished processing a form, the browser window containing your form will automatically close. If you close the browser window before BP Logix has finished processing your form, **your form may not get submitted**.

Once you submit your form, it may be viewed but not changed. To view submitted forms, click the “View Forms in Process” tab.

Upon submission, you will receive an email with a PDF of your form attached. If you do not receive the email with the attached PDF or have any questions about this, please contact the main contact responsible for the form. For ORPS forms [orsp@uwec.edu](mailto:orsp@uwec.edu) or 715-836-3405. After submission, you can view and track the progress of your form under the View Forms In Process tab.

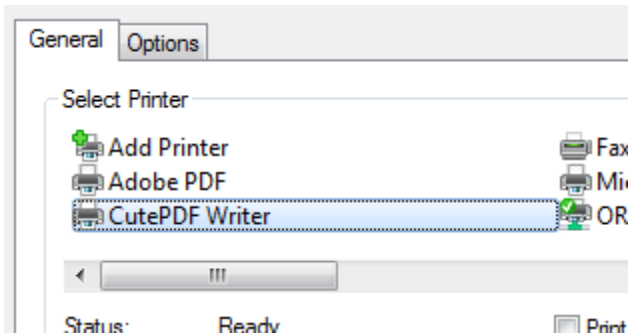
## Form workflow:

Each form can only be edited by one person at a time. If you are the current “user” in the routing order, it will be available in your “My Tasks” folder. If a form is not in your My Tasks folder, it is in another user’s My Tasks folder, and, therefore, will not be editable by you. However, you will always be able to read it in the View Forms in Progress folder.

## Printing and sharing a PDF of your form:

You can print a form at any time by following these steps. Note: these instructions assume you have CutePDF installed, and are written with Internet Explorer in mind, but the process will be similar with most browsers and PDF printing software.

1. With the form open, press  on your keyboard.
2. A new window should open. Select CutePDF Writer (installed by default on campus computers).



3. Select a name and location to save your PDF when prompted.
4. A PDF version of your form will then be generated.

## Who to call for questions or additional help:

Call the main contact responsible for the form. For example, for questions on a Small Research Grants application, call ORSP at 715-836-3405, or email [orsp@uwec.edu](mailto:orsp@uwec.edu).

