RICOH

Using the Task List

The Live Forms Task List is an electronic listing of workflow tasks that require a user's attention. It is similar to an email Inbox. Users must log in to Live Forms to access their task list. Note: all of the APS District eForms will be combined in your My Tasks by the name of the eForm – Federal Programs, Grants Department, MMEP and/or M&O.

To initiate a new eForm request -
1. Select the appropriate eForm **–** Print Services https://printservices.aurorak12.org/eforms/
2. Do not initiate a new eForm request if you suspect you submitted something incorrectly.
3. If your administrator cannot open your request in their email or in the Ricoh My Tasks there may be an error.
4. If at any time you feel you entered an incorrect email address, please contact the appropriate person, we can assist with resetting the eForm for corrections.
   a. Federal Programs- Sherry (28418)
   b. Grants –Ruth please email rmgonzalez@aurorak12.org
   c. Email printservices@aurora12.org - a ticket will be opened for you.
5. Once you electronically sign and submit your request you can view and track your request by logging into the Ricoh system.
6. Can't remember if you already submitted your request? Sign into the Ricoh System and follow the Search Icon steps below.

To access Ricoh- use one of the following steps
- Sign in using the same login as your computer (case sensitive & use aurorak12.org)
- Open a new task by using eForms-No-Reply link from your Google email or
- Access your eForms Task List – Print Services https://printservices.aurorak12.org/eforms/

My Tasks
Selected tasks will display with a blue background.

My Tasks

1. Click the [icon] icon to manually refresh the Task List. The expanded/contracted state of the refreshed task list will **not** change.
2. Click the [icon] Inbox icon to display a non-expanded task list. The task list is color coded.
   a. White – Tasks with a white background are pending
   b. Red - A red background indicates tasks that have been aborted, a reason will be provided.
   c. Green - Tasks with a green background have been submitted
3. Click the [icon] Recent icon to see all tasks you acted upon in the past 7 days.
4. Click the [icon] icon to search for tasks you have performed in the past.
   a. Enter search criteria and click Submit. Note that the search will only find tasks in your history, i.e. tasks that you have participated in. This search is not guaranteed to find tasks that are pending in your task list.

My pending Tasks

The My Tasks page lists all the flows pending to be performed by you or pending to be performed by someone with one of your assigned roles. Tasks will be separated by the type of eForm; if there is a red triangle you are ready to complete the task.

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1. Click the ▶ icon to perform the task. This icon is red when the task is locked by you so that only you can perform it.
2. Click the ⟲ icon to see the event history for this specific task. For flows you will see all the users that have participated in the flow thus far.
   a. **Note: email fields (Requestor User Name & School or Site Administrator) are case sensitive and should not include aurorak12.org.**
3. If there is a blue triangle or the task is locked, there may be an error you will not be able to complete the task.
4. If at any time you feel you entered an incorrect email address, please contact the appropriate person, we can assist with resetting the eForm for corrections.
   a. Federal Programs- Sherry (28418)
   b. Grants –Ruth rmgonzalez@aurorak12.org
   c. Email printservices@aurora12.org - a ticket will be opened for you.
5. The initiator may receive a pending task if a request is rejected, a reason will be provided.

Audit Trail

Click the ⟲ icon to view a task's event history. A new event is added to a task's history each time that you save, submit, aborted, pending, and/or modified.

Audit Trail

▶	PENDING	By: Maribel F..	Sep 11, 2018 at 11:00 MDT	For User: Antonio V..
▶	PENDING	By: Antonio V..	Sep 11, 2018 at 11:07 MDT	For User: Sherry Hi..
▶	PENDING	By: Sherry Hi..	Sep 11, 2018 at 14:54 MDT	For User: David Sch..
▶	PENDING	By: David Sch..	Sep 11, 2018 at 15:02 MDT	For User: Amy Beruan
▶	PENDING	By: Amy Beruan	Sep 12, 2018 at 07:26 MDT	For User: Sherry Hi..
🖺	SAVED	By: Sherry Hi..	Sep 12, 2018 at 12:17 MDT	For User: Sherry Hi..
⧐	SUBMITTED	By: Sherry Hi..	Sep 20, 2018 at 09:44 MDT	

Search icon

Enter search criteria and click Submit. Note that the search will only find tasks in your history, i.e. tasks that you have participated in. This search is not guaranteed to find tasks that are pending in your task list.

1. Click the 🔍 icon to search for tasks you have performed in the past.
2. Select the Form Type - Select a Start & End Date- Submit
   a. Note that the search will only find tasks in your history, i.e. tasks that you have participated in. This search is not guaranteed to find tasks that are pending in your task list.
   b. The task list is color coded
      i. **White** – Tasks with a white background are pending
      ii. **Red** - A red background indicates tasks that have been aborted, a reason will be provided
      iii. **Green** - Tasks with a green background have been submitted

A **Save Button** was added to every Federal Programs eForm, now you can work on a request and if interrupted, *Save* your eForm. Do not Sign and submit unless you are ready for your principal to approve.

How will you be able to find an eForm once saved?
Easy, log into the Ricoh System (do not open up a new eForm). Use the following link https://printservices.aurorak12.org/eforms/ **OR** from Print Services eForms - Select *Access your eForms Task List*. You will be required to login with your computer login & password.

Under your **My Tasks** look for the eForm that you saved, click the red triangle to open and continue. Your My Tasks will look similar to the screen shot below. Sign and Submit to your principal when your eForm is complete

On a side note: the initiator *cannot* be the Program Administrator, School or Site Administrator *must* be your principal. You will always need to add the first part of your principal's email (without the aurorak12.org). For example: jasmith. When in doubt, click over the icon and it will provide an example.

Rejected eForms
It would be in your best interest to log into Ricoh periodically to check if any eForm requests were rejected back to you. The Ricoh system does generate an eForms-No-Reply email to you that you can also click the link to make corrections.