

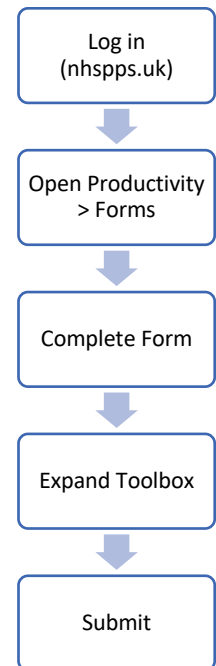
Introduction

This quick guide provides a one page reference to users of the NOESIS system on how complete an electronic form. This guide is intended to be a high level quick reference rather than an exhaustive explanation of how the system works.

Electronic Forms (eForms) have been developed to digitise and automate various processes. When you access the My Forms page, a list of forms you have access to is presented along with a button to complete the form. Once submitted, the form response will follow a series of predefined workflow steps including approvals before being processed. As the responder, you will be notified by email as your response proceeds, and can check and interact with the form at any time in the process.

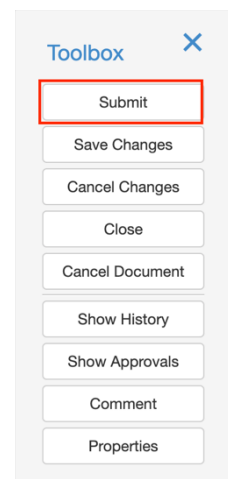
Steps

1. Log in to NOESIS at <https://nhspps.uk> using your username and password
2. At the top of the screen, select Productivity > Forms
3. Select the form you would like to complete
4. Complete all the relevant sections and questions, note questions with a red asterix require a response
5. Some questions and sections have some inline help which can be viewed by clicking on the blue question mark icon
6. You can save a partially completed form and return later by clicking on the Toolbox on the left and clicking **Save Changes**
7. Once you have completed all relevant questions, open the toolbox on the right and click **Submit**
8. You will receive a notification with a link to track your response, or can access your response through the My Forms page.



The toolbox contains several functions to help you manage your response:

| Function | Description |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Save Changes | Will save your response without validating the content for later submission. You can return to your draft response through the My Forms page (click on the responses button) |
| Cancel Changes | Will revert to the form state since the last save |
| Close | Closes the page without saving progress |
| Cancel Document | Changes the status of the document to cancelled. Any existing workflow steps will also be withdrawn. |
| Approve | Available to the current approver. Clicking this will open a box to enter a comment before approving the workflow step. |
| Reject | Available to the current approver. Clicking will open a box to enter a comment before rejecting the response. The responder will be notified and can change the form and resubmit if appropriate. |
| Forward | Available to the current approver. Clicking will allow the approver to select a colleague to forward the approval request to in order to approve on your behalf. |
| Not For Me | Available to the current approver. To be used when documents are sent to you in error. Clicking this will notify the form owner of a problem which they will fix and route to the correct person. |
| Show History | Clicking this will display a list of all changes and actions taken against the form. This also includes any comments that have been added. |
| Show Approvals | This will display a visual representation of any previous and current approval steps. Green steps are complete, Red steps have failed and Amber steps are current. Each step includes the status, outcome and details of colleagues assigned. |
| Comment | Available to all users, enables you to add a comment to the history. Current approvers and responders will be notified of new comments added |
| Properties | Provides a summary of key properties such as date entered and responder. |



Getting Help

If you experience any problems, you can log a call with the PPS help desk either online at <http://nhspps.uk> or by calling 020 3322 1935.

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