

Overview

This document is a high level overview of the Probaris SP system. More detailed information can be located in the help section. Additional assistance can be obtained by e-mailing the SP Admin at bc_sp_admin@blm.gov.

What is Probaris SP?

Probaris SP (Secure Process) allows us to replace paper forms with electronic versions that are easier to fill in and *route*, less error prone and more secure.

Mini Glossary

There's a complete glossary available as explained in the tip above. However, it's useful to understand a few key terms right away:

editor - Any authorized user who fills in a form section.

finalize - To close out a form *instance* One electronic copy of a form, which, in the normal course of events, will be filled-in by one or more editors, approved and finalized. A finalized form is no longer active and is considered filed.

originate - To create a new instance of a form.

route - To send a form to the next editor in the form's routing sequence.

section - A form is made up of two* or more sections. For one form you may be authorized to fill in only Section 1 of 5, on another, Sections 2 and 4 of 6 and for yet another, none of the sections. Your job responsibilities determine which sections of which forms you can fill in. If the sections you are supposed to fill in are contiguous (like Sections 2 and 3) you can fill them in at the same time. If the sections are not contiguous (like Sections 2 and 4) you would route the form to the next editor after filling out the first section for which you're responsible. Later, the form would be routed back to you.

* A form always has at least two sections: The Originate section, filled in by the person who originates the form instance, and the Final section, filled in by the person who finalizes the form.

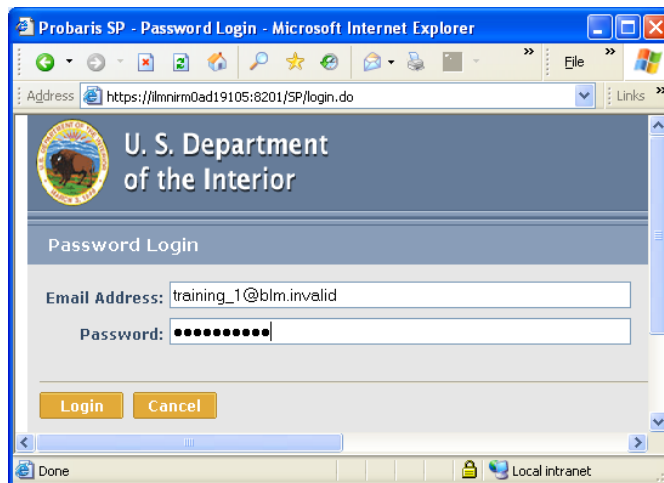
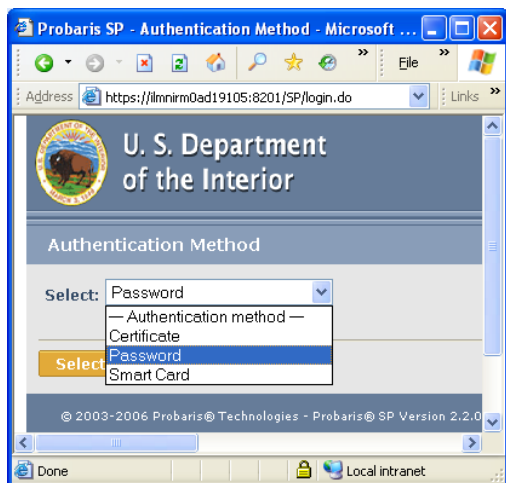
Template vs. Instance

A blank form is a *template*. Every time you need to *originate* a form you open a *template*. Once you've started to fill in a form it becomes an *instance* of the form. When we use the term "form" by itself, we generally mean a form instance.

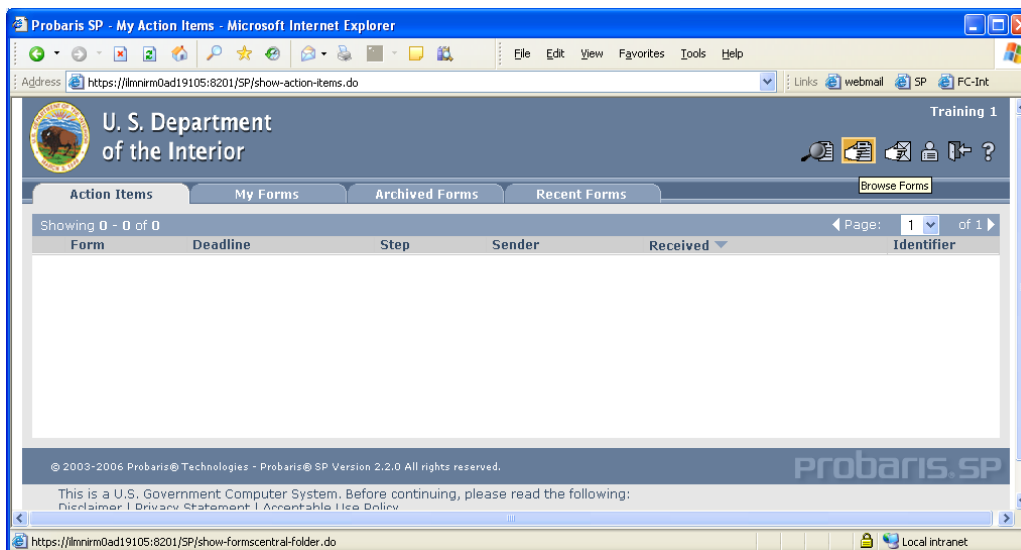
Let's Get Started...

Browse to <https://web.eforms.blm.gov:8201/SP/login.do>, select **password** as your authentication method and click **select**.

Enter your user id (your e-mail address) and the password **Eforms_123**. Click **Submit**. You will be required to change the password on your first login.



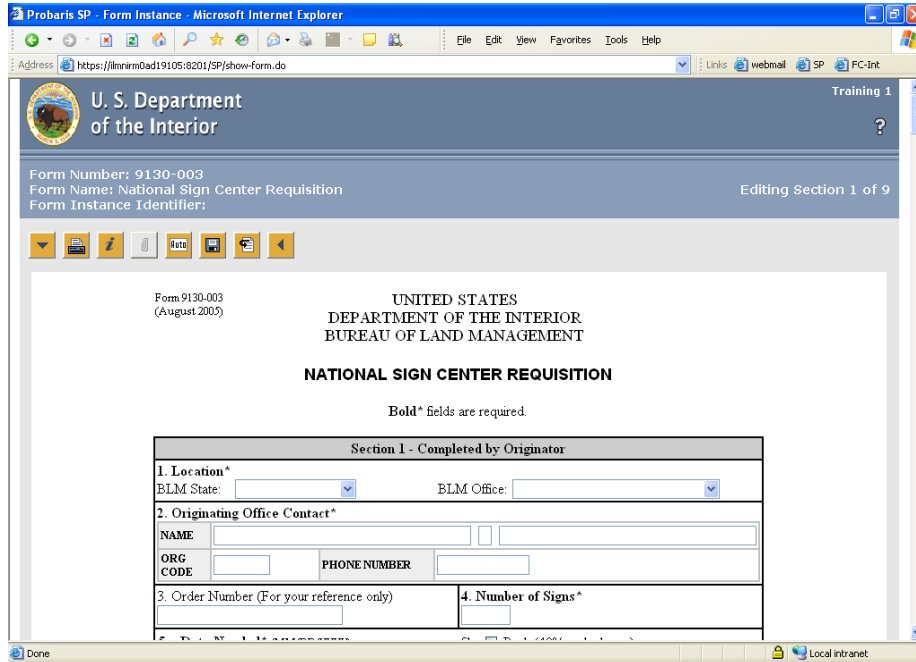
Once you are logged in, the first screen (your home screen) is the **Action** tab. Any items that are assigned to you for action will appear on this screen. Below shows how to create an *instance* of a form and route it as needed. The easiest way to locate a form is by using the **browse** function. In the screenshot below the browse button is highlighted on the upper right corner. Click this button.



You will be directed into a section that looks similar to Forms Central. Click on the correct folders until you locate your form. For the purposes of this high level training document, we will demonstrate with the Sign Painters form.

- 📁 [Bureau of Land Management](#)
- 📁 [Grouped by Form Numbers](#)
- 📁 [9000-9999](#) **this is located on page 2 of the form number folders
- 📄 [9130-003](#)

Each section has a header and each header tells us who is responsible to complete that section of the form. In the below example, section 1 is to be completed by the originator of the form. If you are starting this *instance* then you are the originator.



There are a series of buttons on the upper left corner of the page as well as a question mark icon (the help section) on the right corner.

The Form Button Bar



What Each Button Means



Bottom/Top of Page Goes to the bottom of the page, which is where the Form Actions menu is located.



Printable Downloads a printable (PDF) version of the form as it looks right now.



Info Opens the Form Instance Details page (in a new window) showing the actions that have been taken for this form instance.



Attachments



Opens a page (in a new window) in which you can attach a file to the form. If the button is grey, this indicates the form does not have any files attached.



Save Saves the form.

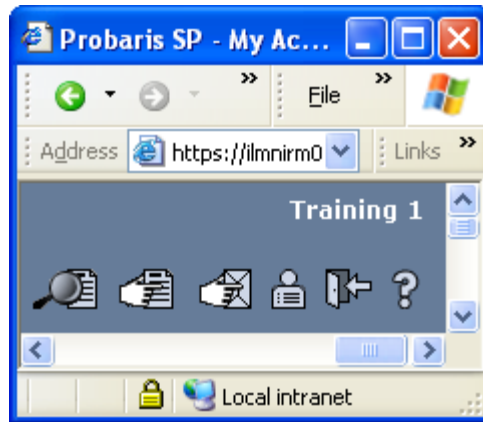


Reset Clears the form. Clears everything you have entered since your last save.



Close and Go Back Closes the form and goes back to the folder you were in last. Use the this button to close a form without routing it.

The Action Tab Toolbar



Search Forms



Browse Forms - *** This is the easiest way to locate a form



Manage User Invitations – If you have sent an invitation



My Profile – Your user information



Logout



Help – Comprehensive online help system

FAQ's

I routed the form to someone who is out of the office or to the incorrect person. What should I do?

Enter the form which needs to be re-routed. Click the down arrow to move you to the bottom of the page. Click the down arrow on the **Form Actions** menu and select **Withdraw**. Click **OK**.

I routed the form to someone who is out of the office or to the incorrect person. What should I do?

Withdraw the form. Make any necessary corrections and re-route if needed.

I can't remember my password.

Send an e-mail to bc_sp_admin@blm.gov requesting a password reset.

I need to route my form to someone and don't see them in the address book.

Enter their e-mail address in the **To** field and click **Submit** on the bottom. You will receive a message that the user is not a valid user of the system. If the form is one that will allow you to send the user an invitation you will see a text box which will allow you to click invite to send the user an invitation. If it is not a form where you can send an invitation you will only see the message that they are not a valid user of the system. Have the new user send an e-mail to bc_sp_admin@blm.gov and request a user id.