

Etrieve Training

Leave Requests and Absence Affidavits

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Lenny Riley – Instructional Technology
Specialist



NORCO
COLLEGE



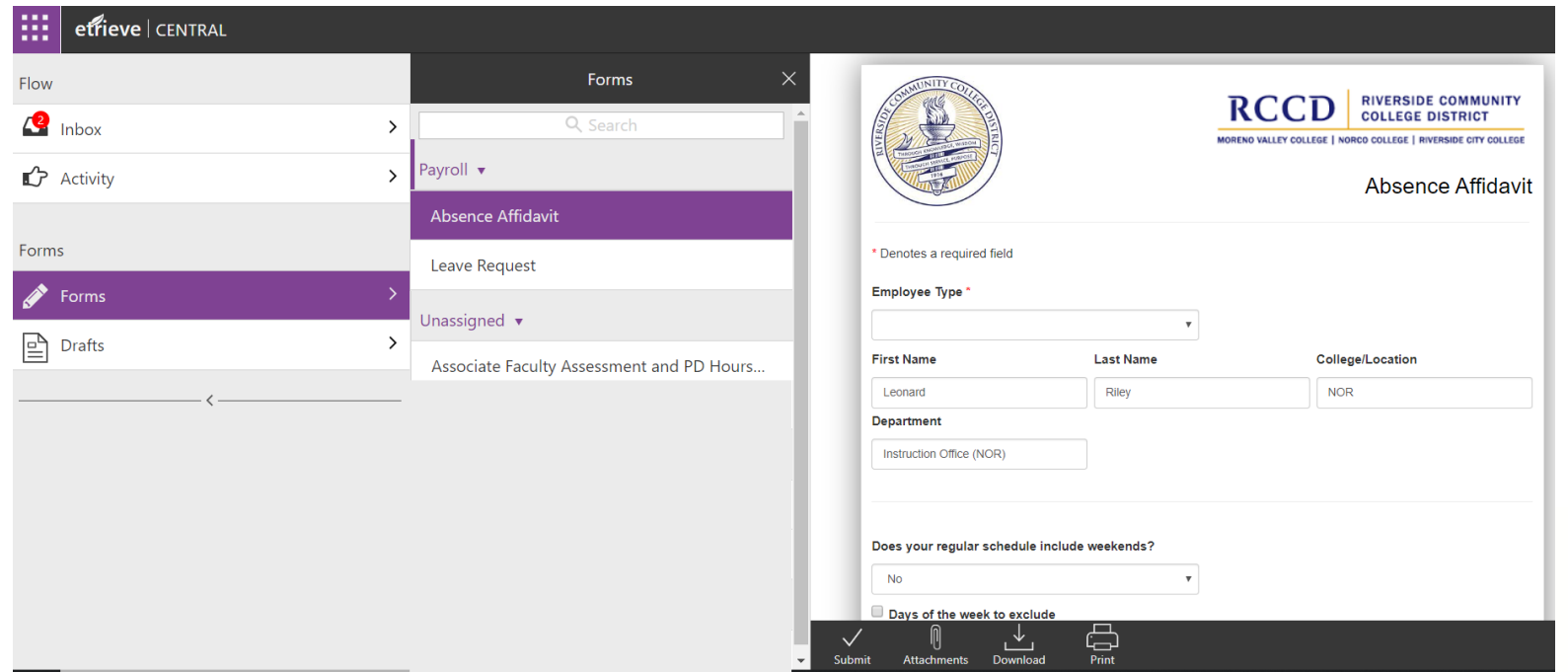
- What is etrieve?
- What will Norco College be using it for?
- How does this differ from fillable PDF's and how does it benefit RCCCD?
- What is our timeline?



- How do I login?
- How do I fill out a form?
- How does a form get approved?
- What are the form options in etrieve?



What is etrieve?



etrieve (also known as ***Etrieve Central***) is RCCCD's electronic forms program.



What will Norco College be using it for?

Norco College will be using it to submit and approve leave requests and absence affidavits for staff.



How does this differ from fillable PDF's and how does it benefit RCCD?

The big difference between PDF's and etrieve's forms is security and tracking. With etrieve, we can limit who can access individual forms, control the workflow of the request, and track its progress from one user interface.



Benefits

- Improves upon current processes
- Eliminates leg work
- Tracks status of submitted requests
- Data export
- Auto-populates the eforms
- Email notifications
- Mobile friendly



What is our timeline?

- August 2018 – Training and Pilot implementation with Business Services
- January 2020 – Pilot implementation with Academic Affairs
- May 2020 – Training for attendance keepers, managers and staff
- June 1, 2020 – Go live throughout the entire college. *This means that the paper process will no longer be used.*

How do I login?

<https://myapplications.microsoft.com>

- College/District Email Address =
FirstName.LastName@norcocollege.edu
- Password is the same as your Network and Email
(Office365) password



Enter your College/District Email Address and click “Next.”



Sign in

Email or phone

[Can't access your account?](#)

[Sign in with a security key](#) ⓘ

Next

**Enter your College/District Email password
and click “Sign in.”**



Enter password

Password

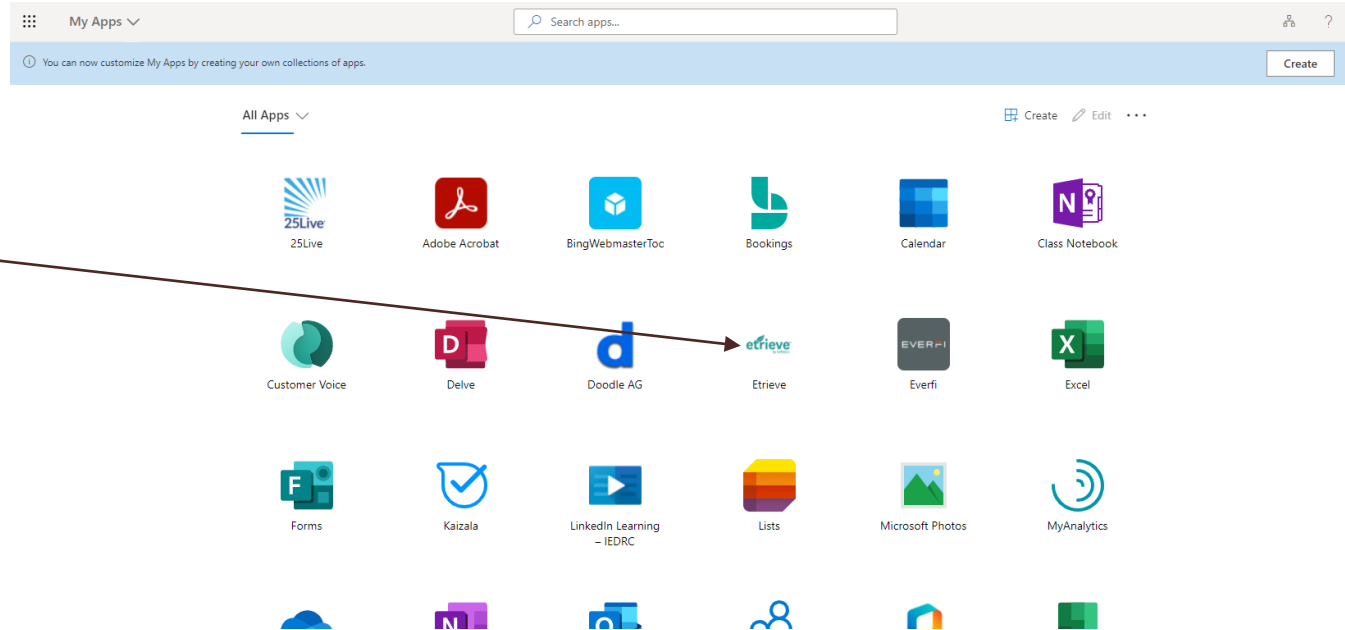
[Forgot my password](#)

Sign in

myapplications.microsoft.com

Single Sign-On (SSO) Portal

**Click on the
Etrieve icon**



Etrieve

etrieve | CENTRAL

Flow

- Inbox >
- Activity >

Forms

- Forms >
- Drafts >

<

How do I fill out a form?

- Auto-filled
 - Drop-down list
 - Date Field Calendars
 - Select the date from the drop-down calendar
- Insert/Remove extra lines

* Denotes a required field be populated before continuing.

Is this a New or Revised request?

First Name: Last Name: College/Location:

Department:

Does your regular schedule include weekends?

Days of the week to exclude

Vacation Requests must be submitted in advance and are subject to the approval of the District. Vacation shall be scheduled according to the needs of the District and the preference of the employee. Approval is subject to sufficient number of vacation time earned to cover the request.

Leave Type *	Requested Date Start *	Requested Date End *	Hours Per Day	Days	Total Hours
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="-"/>	<input type="button" value="+"/>			<input type="text" value="0"/>	<input type="text" value="0"/>

How do I fill out a form?

Supervisor Select

- Type in the person's name
- Select the correct person
- Press ENTER to select your approver

Attendance Person Select

- Type in the person's name
- Select the correct person
- Press ENTER to select your attendance person

The image shows two screenshots of web forms. The top form is titled "Supervisor Select" and contains a search bar with the text "Please search for your supervisor by name or title *". Below the search bar are two input fields: "Supervisor's First Name" with the value "Joann" and "Supervisor's Last Name" with the value "Bailey". The bottom form is titled "Attendance Person Select" and contains a search bar with the text "Please search for the person in charge of your attendance report." Below the search bar are two input fields: "First Name" with the value "Natarikia" and "Last Name" with the value "Williams Morris". Both forms have a small blue icon with a right-pointing arrow next to the input fields.

How do I fill out a form?

- Acknowledgement of accuracy checkbox
- Submit and/or other options

Required Checkbox for Form Submittal

I understand that checking this box constitutes a legal signature confirming that information provided on this form is accurate to my knowledge. *

Submit Attachments Download Print

How does a form get approved?

- Once you click Submit, it will route to the Approver - Supervisor
- Email notification will be sent to you, the Supervisor and the Attendance Keeper



Fri 5/8/2020 2:28 PM

Etrieve@rccd.net

Etrieve Flow Notification.

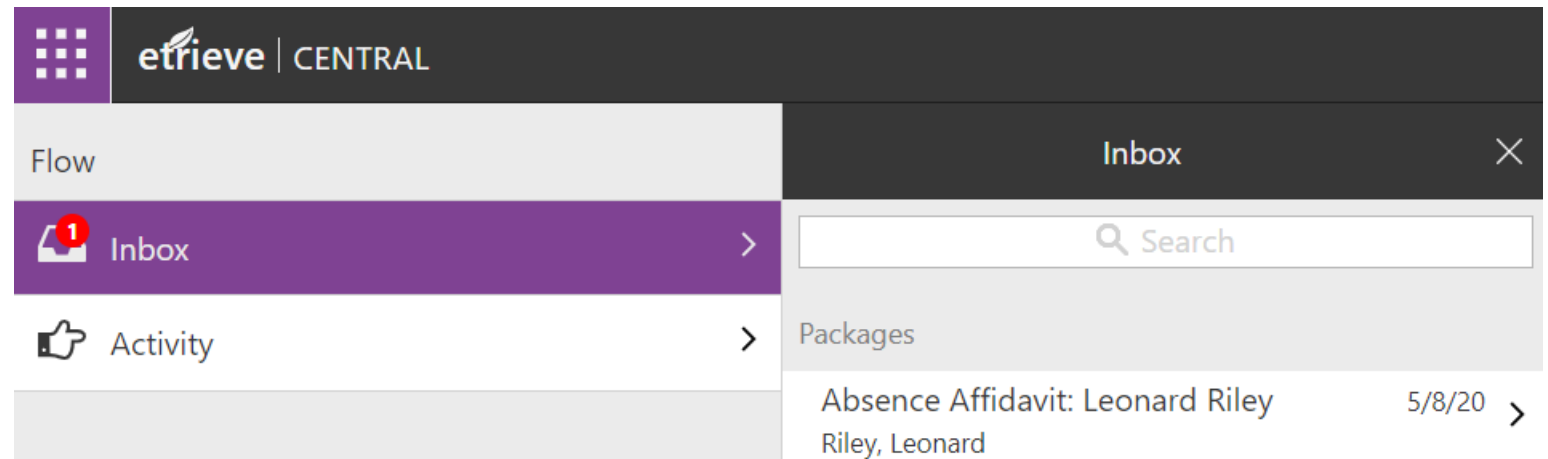
To Riley, Leonard

The workflow package 'Absence Affidavit: Leonard Riley' has been submitted by Riley, Leonard and is available for your review.

To access it, please [click here](#).


How does a form get approved?

- **Inbox Notification**
- **Supervisor will click on Inbox**
- **Click on the form in second column**



How does a form get approved?

- Click on the form a second time to review and approve or decline the request

 **RCCD** | RIVERSIDE COMMUNITY COLLEGE DISTRICT
MORENO VALLEY COLLEGE | NORCO COLLEGE | RIVERSIDE CITY COLLEGE

Absence Affidavit

* Denotes a required field

Employee Type *

Classified

First Name **Last Name** **College/Location**

Leonard Riley NOR

Department





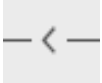
Instruction Office (NOR)

Does your regular schedule include weekends?

No





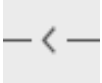
Days of the week to exclude

Approve Decline Refer Return History Attachments Locked Source

-  • Inbox
-  • Activity
-  • Forms
-  • Drafts
-  • Expand/Collapse





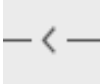
INBOX contains eforms that were delivered to you either directly or through an approval workflow.

What are the form options in etrieve?





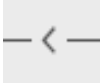
-  • Inbox
-  • Activity
-  • Forms
-  • Drafts
-  • Expand/Collapse

ACTIVITY contains a list/history of eforms you have submitted or acted upon (Approved/Declined/etc...)

What are the form options in etrieve?





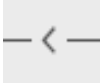
-  • Inbox
-  • Activity
-  • Forms
-  • Drafts
-  • Expand/Collapse

FORMS contains a list of eForms you have access to complete and submit.

-  • Inbox
-  • Activity
-  • Forms
-  • Drafts
-  • Expand/Collapse

DRAFTS contains any eform you began but had not yet Submitted.

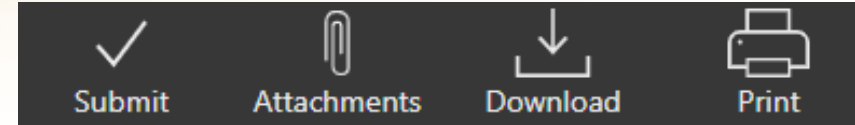
What are the form options in etrieve?

-  • Inbox
-  • Activity
-  • Forms
-  • Drafts
-  • Expand/Collapse

EXPAND/COLLAPSE allows you to minimize or maximize the Menu Column.

What are the form options in etrieve?

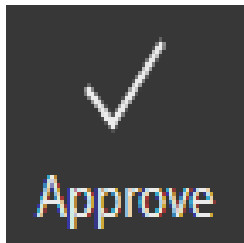
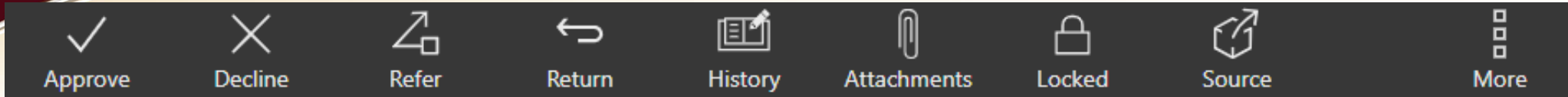
Submitting a form



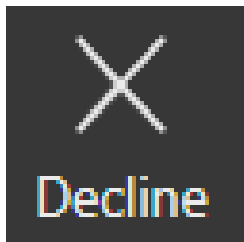
- **Submit** – sending to Supervisor for approval
- **Attachments** – attaching any supporting documents
- **Download** – downloading the form as a PDF
- **Print** – printing the form to your printer

What are the form options in etrieve?

Approving a form

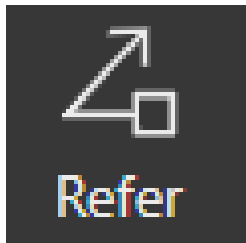
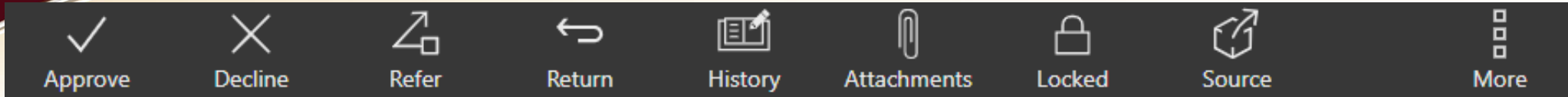


- **Approve**



- **Decline**

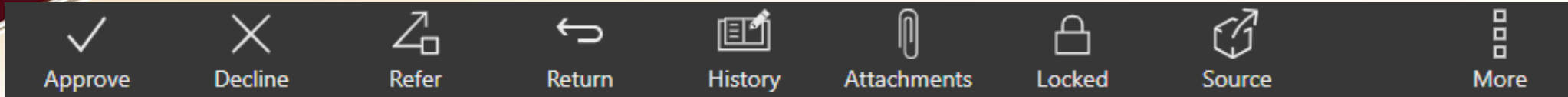
What are the form options in etrieve?



- **Refer**

- Supervisor refers the form to designated approver (perhaps while on leave)
- Designated approver obtains privileges of the person who referred the form
- Temporary access – only for that form

What are the form options in etrieve?



- **History**

- Click on **VIEW CHANGES**
- Click **CLOSE** to display entire screen
- Click on **i** to view the History of that field
- Refresh your browser to clear the icons

What are the form options in etrieve?



Lenny Riley
Instructional Technology Specialist

(951) 372-7075