



RCCD Etrieve Central Training

RCCD Electronic Forms Training for Originators and Approvers

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Objective(s)

The objectives of this lesson plan is to 1) Introduce Etrieve Central and its capabilities, 2) Navigate Etrieve Central, 3) Learn how to properly route an electronic form for approval, and 4) Demonstrate how to submit and/or approve an electronic form such as a Time-off/Vacation Request, Absence Affidavit, etc.

Why do I need Etrieve Central Training?

Etrieve Central training will help to acquaint you with the electronic forms (eforms) accessible through the Etrieve Central application. Etrieve Central is an application developed by Softdocs which uses the Softdoc's "Forms" and "Workflow" components for the sole purpose of centralizing the functions to design, publish, and manage electronic forms. These eforms can be driven through an approval workflow, which is the second component of "Forms" and "Workflow." RCCD has selected the Softdocs Forms and Workflow applications within Etrieve Central to replace the current PDF forms and the manual process in which various forms are signed/approved.

How will it improve the process?

The Etrieve Central solution will allow users to complete and submit while allowing Approvers to approve/decline eforms within one interface. The intent is to expedite the approval process, reduce the amount of "leg-work" associated with obtaining an approval, and reduce the amount of paper used. The Etrieve Central solution allows for tracking of submitted forms, capturing important data, and providing information necessary to complete the form, as the eform is being filled in.

It is also 100% mobile friendly! Etrieve Central users can submit and/or act on an eform from modern mobile devices inside and outside of the RCCD Network.



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Accessing Etrieve Central

Single Sign-On Portal:

IMPORTANT! Use of Google Chrome browser is highly recommended. Other browsers such as Firefox and Safari may not support certain functions and formats within the eform.

Security management occurs through Active Directory and access to Etrieve Central is possible with a link within the RCCD Single Sign-On Portal landing page. Simply point your browser to **go.rccd.edu** and sign-on using your College/District email address and password. If this is your first time signing onto the SSO Portal, you will be prompted to answer several questions to secure your access to the Single Sign-On Portal. You can skip this for now and complete it later. For more details regarding First-time sign-on, please refer to link below

RCC - <http://www.rcc.edu/about/it/Pages/wifi.aspx>

Norco - <http://www.norcocollege.edu/Pages/WiFi.aspx>

Moreno Valley - <http://www.mvc.edu/students/lostpassword.cfm>

Navigating within Etrieve Central

There are two Roles a user can play in Etrieve Central, the Originator and/or the Actor.

Originator is the person who will start the process by filling in the required elements of an eform and then submitting it for approval.

Actor is the person who will “act” upon the submitted eform by either Approving, Declining, or Referring the eform.

Upon accessing the landing page for Etrieve Central, you will be greeted with a short menu.



Inbox - The Inbox will packages that will contain an eform (and anything which may have been attached to the form) submitted to you for action.



Activity - The status of the eform you had submitted for approval.



Forms - Forms will contain all the eforms you will have access to submit. These are displayed in Groups and there is the ability to search for an eform based on the name of the form. A “Collapse All” feature is available and will collapse to the Group level.



Drafts - Drafts will contain any form you have started to fill in but have not yet submitted. You can delete drafts by clicking on the Edit text at the top right of the list.



Collapse/Expand - This feature will allow desktop users to collapse or expand the menu width to allow for more room for the eform.

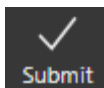


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Completing an eform:

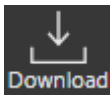
1. Click on the Forms menu item
2. Select an eform from the list. A single click on the eform will display the eform page to the right of the list.
3. A red asterisk * denotes a required element within the eform and must be populated prior to submitting the eform.
4. Provide the name/email of the person(s) to approve the form. Example: The Absence Affidavit requires the Originator provide the name of the Supervisor and Administrative Assistant (or person in charge of attendance). Other eforms will require more than just one person who will approve and may require the name of a Dept/Group.
5. Some eforms will have a required Acknowledge check box as well as the Approval Routing for that particular eform.
6. Once all the required elements have been provided, the Originator can click on the "Submit" button.
7. Functions available to the Originator:



Submit the form [once all the required information have been provided]



Attach a document to the eform



Download the eform to a PDF file



Print a copy of the eform



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Acting on an eform:

Actions available to Actors:

The Actions available include Approve, Refer, and Return based on your approval privileges and/or form approval routing.



Approve a submitted eform.



Decline the eform and terminate the workflow.



Refer an eform to another for action. Receiver will [inherit](#) approving rights.



Send an eform back to the Originator or last Actor.



Add a Note and/or View the routing history of the form (Audit Trail).



Attach a document to an eform.



Another person has taken ownership and no one else can act upon it.



No one has taken ownership of the eform.



[Not used for RCCD implementation]



Download a PDF copy of an eform.



Print a copy of an eform.



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Approving an eform is as simple as clicking on the Approve button, but there may be other actions needed or feedback from other parties prior to approving an eform. The Refer, Return, and History buttons help with this need. The History button allows the Actor to enter a note or comment into the eform's History after which the Actor can either "Refer" the eform to another person or "Return" the eform to the previous Actor or Originator.

When an eform is "Referred" to another person, that person will inherit the Referrer's ability to approve the eform. When an eform is "Returned", it does not [inherit](#) the Referrer's approval abilities. In either situation, the History icon will have a red asterisk indicating a Note/Comment is included with the eform.



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Approval Routing

Etrieve's Workflow component has the two methods for routing eforms. Workflow provides the capability of automatic or manual routing for approval.

Automatic routing allows eforms to route to an approver (or a series of approvers) based on predefined workflows and is very data-dependent.

Manual routing allows the Originator and/or Actor to select the approver(s).

Due to inaccuracies within our databases, we will utilize the Manual routing option and display the intended Workflow at the bottom of each eform.

Example 1: Multiple Approvers

Approval Routing:

Professional Development:
Assessment Coordinator-> Professional Development Coordinator-> Dept. Chair-> Dean -> Payroll Group

Assessment:
Professional Development Coordinator-> Dept. Chair -> Dean -> Payroll Group

Online Canvas Academy:
If you are submitting the form for Online Canvas Academy, please select Rolando Regino as the first Approver for Open Campus.

The approved routing for Approval.

Select Approver Type

Approver Lookup

Person/Group: Person

Search for Approver by Name

Selected Approver Name

Selected Approver Title

Selected Approver Username

Remove Last

Add Approver

Add Approver to Approval Routing List.

List of Approvers in Order

Approval Routing List

Order	Approver Name	Title	Type
1	Rene Balingit [Business Systems Analyst] [Inforr	Business Systems Analyst	P
2	Ryan Concepcion [Analyst Programmer] [Informa	Analyst Programmer	P
3	Laurie Crouse [Administrative Assistant IV] [Busir	Administrative Assistant IV	P



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Example 2: Single Approver

Supervisor Select

Please search for your supervisor by name

Search for primary by Name

Select

Add to Routing List.

Supervisor's First Name

Supervisor's Last Name

Attendance Person Select

Please search for the person in charge of your attention

Search for secondary by Name

Please search by name or title *

Select

Add to Routing List.

First Name

Last Name



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Form Specific Instructions

[PT Faculty Assessment and Professional Develop Hours Report](#)



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PT Faculty Assessment and Professional Development Hours Report

Originators

- 1) Confirm the pre-populated Employee information is accurate
- 2) Professional Development Hours
 - a. Enter the date of the event
 - b. Enter the Activity
 - c. Enter the amount of hours
 - d. OPTIONAL: Click on the button with the + symbol to insert a new blank line. [Max. 4]
 - e. Provide a description or summary of the activity
- 3) Assessment Hours
 - a. Enter the date of the event
 - b. Enter the Activity
 - c. Enter the amount of hours
 - d. OPTIONAL: Click on the button with the + symbol to insert a new blank line. [Max. 4]
 - e. Provide your Self-Reflection or Summary of the Activity
- 4) Approver Lookup
 - a. Select the Approver type: Person/Group
 - b. Search for the Approver by Name [Online Canvas Academy please select Rolando Regino as the only approver]
 - c. Click on the Add Approver button to add the Approver Person or Group to the Approval Routing List
 - d. Repeat if necessary [Refer to the Approval Routing information]
- 5) Approval Routing List
 - a. Review the list of Approvers selected and they are in the order based on Approval Routing information]
- 6) Confirm the information provided is accurate and then click on the check box
- 7) Click on the Submit button



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Professional Development Coordinators

- 1) Click on the link to the eform within the email notification or Locate the eform within your Inbox
- 2) Click on the package to open
- 3) Click on eform to open the eform
- 4) Review the information
- 5) In the section labelled "Optional items for use by Professional Development Coordinators", click on the box to "Show Optional Items"

OPTIONAL ITEMS FOR USE BY PROFESSIONAL DEVELOPMENT COORDINATORS

☐ Show Optional Items

- 6) select the corresponding activity
- 7) OPTIONAL: Click on the History button to enter Notes/Comments
- 8) Click Approve to submit the form to the remaining Actors

Payroll Technician

- 1) Locate the eform within your Inbox
- 2) Click on the package to open
- 3) Click on eform to open the eform
- 4) Review the information Submitted
- 5) Within the section labelled "Payroll Use Only", Click on the box to "Show Calculator"
 - a. Verify the Budget Code is accurate
 - b. Select the appropriate Funding Line and Rate then click "Add Line" to insert into the calculation table
 - c. Enter the Hours for each Funding Line + Budget Code entry
 - d. Review the Total Hours and Grand Total
 - e. Click Approve to complete the process

Payroll Use Only - Funding Line Calculations

☐ Show Calculator



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FAQ:

Q: Can I print my eform prior to submitting it?

A: Yes, the form can be printed and/or stored as a PDF before submitting it as well as after it was submitted/approved.

Q: Can I access the eforms and my inbox off site?

A: Yes. Etrieve Central can be access from outside of the RCCD Network via the Single Sign-On Portal.

Q: Can I use my iPad, Tablet, or Smartphone to submit or act upon an eform?

A: Yes. Etrieve Central is mobile friendly and can be accessed using many common portable devices with access to the LAN or Internet.

Q: How secure are the eforms?

A: RCCD uses Active Directory to authenticate a person's ability to access Etrieve Central through HTTPS.

Q: Will 3rd Parties (Vendors) be able to access our eforms?

A: Not without an RCCD Active Directory Account.

Q: How do I access eforms?

A: Etrieve Central is accessible by logging directly into Etrieve Central via go.rccd.edu (or through the "Forms" page on our Intranet site)

Q: What does "inherit" mean when referring an eform to another person?

A: When an eform is "Referred" to another person through Etrieve Central, that person will obtain the same privileges to act upon the eform, mainly the ability to Approve or Decline an eform.