

# Montgomery Community College Employee Forms in Etrieve

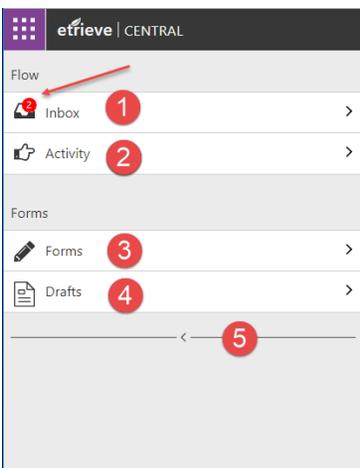
## Access Forms

1. Go to <https://etcentral.montgomery.edu> or the MCC website at [www.montgomery.edu](http://www.montgomery.edu), click the **Faculty and Staff** link (at top of page), then choose Employee Forms (Etrieve).
2. Use the same login credentials as other services (Colleague, Gmail, WebAdvisor, Office PC, etc.)

### Create desktop shortcut to access forms:

- a) Open Google Chrome and go to <https://etcentral.montgomery.edu>
- b) Login with your credentials.
- c) To the right of the address bar, click the three vertical dots and point your mouse on **More Tools**, then click **Create shortcut**.
- d) A shortcut is now on your desktop. You can drag this shortcut to your taskbar at the bottom of your screen and **Pin to Taskbar** if you would like it to appear there, as well. It will appear as a "leaf icon."

## Forms Interface



- 1 Click arrow (>) to view incoming forms
- 2 Click arrow (>) to view current form progress and past forms
- 3 Click arrow (>) to access forms
- 4 Click arrow (>) to access unsubmitted forms
- 5 Click to collapse menu

## Submit a Form

1. Click the arrow to the right of **Forms** to access the list of available forms.
2. Click the form you wish to submit. It will appear on the right side of the screen.
3. For most forms, your name and Employee ID will already be populated. Click the down arrow to choose your Department. Now, click the down arrow to choose your Supervisor. For some users this may be automatically populated once Department is chosen. If not, choose whether you report to a Dean, Vice-President, President or the specific name of your supervisor, if available.
4. Fill in the information requested on the form.
5. Click Attachments to add a file to the form before it is sent, or click Submit to send the form.  
**Note: You can view the basic form routing at the bottom of each form. As the form moves through the route, users can Return a form to a previous user or Refer a form to a user not on the route.**

## View/Approve Incoming Forms

1. Click the arrow to the right of **Inbox** to access the list of incoming forms.  
*Note: The number in the red circle indicates the number of forms in your Inbox.*
2. Click the form you wish to view (once to select, a 2<sup>nd</sup> time to view). It will appear on the right side of the screen.



**Approve:** Click Approve to send the form to the next user on the route.

**Note:** You can view the basic form routing at the bottom of each form.

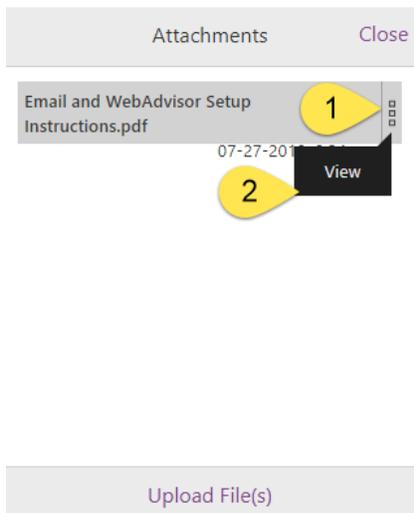
**Decline:** Click Decline to end the form. It will be sent to archive as Declined.

**Refer:** Click Refer to display a box to type in the name of the user for referral. Once the form is “Approved” by the person it is referred to, it will come back to the user making the referral. Clicking Approve once this user has returned to you will send the form to next user based on original route.

**Return:** Click Return to send the form back to a previous user in the route.

**History:** Click History to see the route history.

**Attachments:** Click to view attachments (if any). If attachments exist, a red circle with the number of attachments will be displayed.



**View attachments:**

1. Click the three boxes to the right of the file name.
2. Click View.

**Add attachments:** Click Upload Files to add additional files to the form.

**Locked:** A Locked symbol indicates a user (normally yourself), has the form in use. In cases where groups are used, it is important to click Lock to Unlock the form so the other users can add information/make changes.

**Source:** Disregard at this time.

**Download:** Downloads a PDF to your PC of the current form with the Package History (attachments not included).

**Print:** Displays the Print dialog box to print the form and Package History.

## View Status/Location of Submitted Forms

1. Click the arrow to the right of **Activity** to access the list of incoming forms.  
**Note: Under the form name, you will see either “In Progress” or “Ended”**
2. Click the form you wish to view (once to select, a 2<sup>nd</sup> time to view). It will appear on the right side of the screen.
3. Click the History button (at bottom of screen).
  - **Package History** - shows who has Received and Approved the request including the date and time. The last entry in the list indicates the current location/status.
  - **Audit History**- Click View Changes, then choose the information icon  to view the changes made to a particular field.

## Form Drafts

If you begin a form, but do not submit, the form will automatically save to the Drafts area. Click Drafts, then click the Form name to display and continue filling out.

If you wish to delete a draft, click the Edit button at the top of the list of drafts, then click the checkbox next to the form name. Now click the Delete button at the top of the form list.

## Form Changes

**New User Access Form** – Initiated by Human Resources, this form will go to the supervisor of the new employee. Supervisor will provide specific information on services/equipment needed, then form is routed to IT.

**Travel Reimbursement- NEW FORM.** Employee will choose an approved Travel Authorization from the list provided. List of authorizations include date authorization was submitted and dates of travel.

For dollar amounts, fill in ONLY the boxes in green for Less Advance, Transportation and Other Expenses, and select appropriate meals (Breakfast, Lunch, Dinner) for Subsistence.

Use the Attachments button to send receipts or other documentation.

**Request for School Vehicle** – Use only if you have a blanket authorization. If no blanket authorization, use the Travel Authorization form.

**Travel Authorization** – Use for both day and overnight travel (check appropriate box). Form will be automatically routed to the President for Out of State/Overnight Travel.

**Note: If MCC vehicle is needed, mark under Travel Method (no additional form is required). If P-Card is needed, a Purchase Requisition must be filled out to Bank of America.**