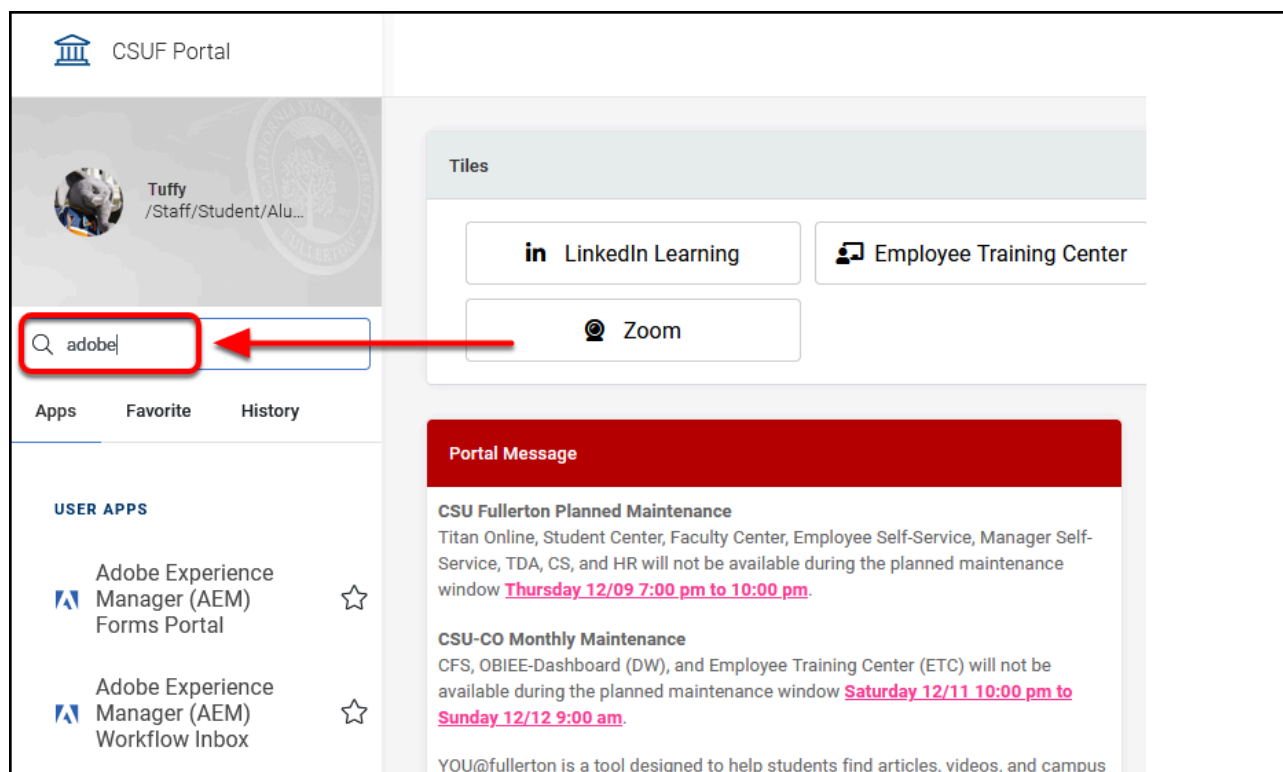# HRDI Forms Guide

This guide is designed to guide you through logging in to the HRDI Forms portal as well as a navigation through the portal tabs and functionality.

Logging In
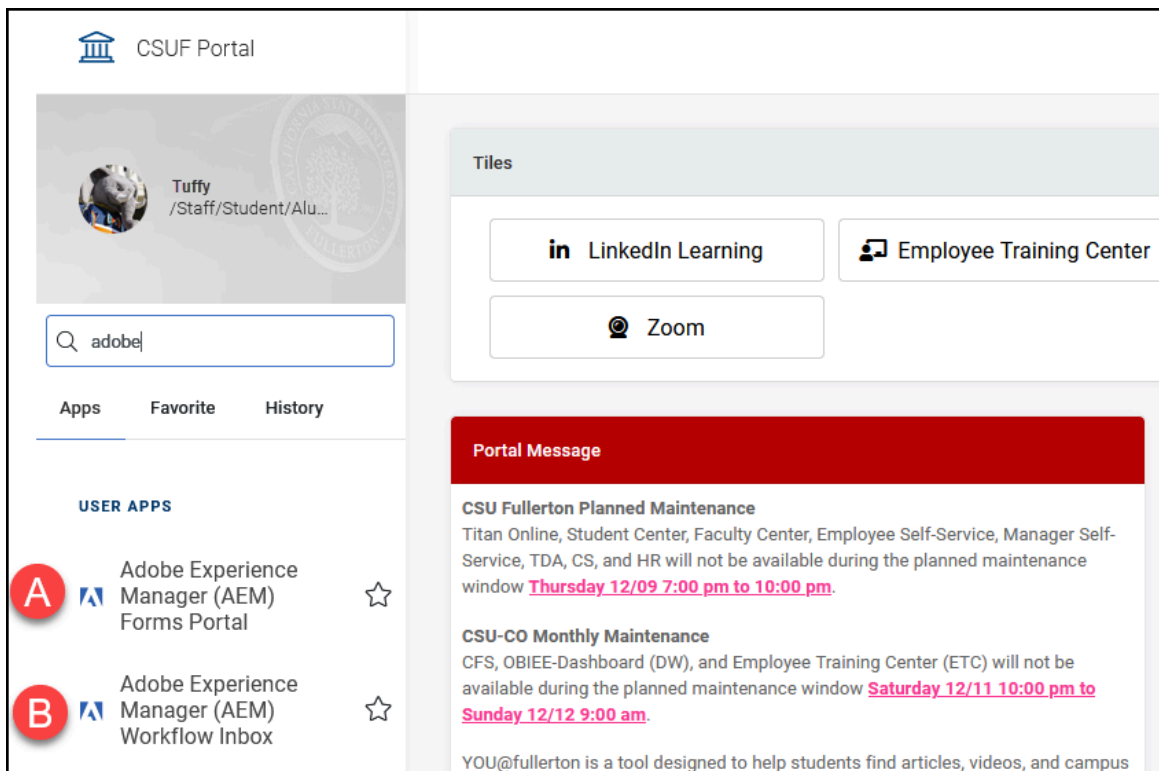
1. Log on to the campus portal.

[View instructions on how to log on to the campus portal.](#)

2. Enter Adobe into the search bar on the left of your portal.

3. Click on Adobe Experience Manger (AEM) Workflow Inbox or

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Page 1

Adobe Experience Manager (AEM) Forms Portal.

A. **Adobe Experience Manager (AEM) Forms Portal** will take you to the list of available forms so you can create a new form.
B. **Adobe Experience Manager (AEM) Workflow Inbox** will take you directly to the existing forms that are waiting for your review/approval.

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Page 2

4. Enter your campus username and password. Then click Sign In.

A. Enter your campus username and password. This is the same information you use to log on to the campus portal.
B. Then click **Sign In**.

5. You can now start a new form or select an existing form to review.

Navigation

Tabs

To navigate through the form, click on the side tabs

The amount and names of tabs will differ from form to form (as shown in the examples below)

Action buttons

There are 4 action buttons located at the bottom of each form

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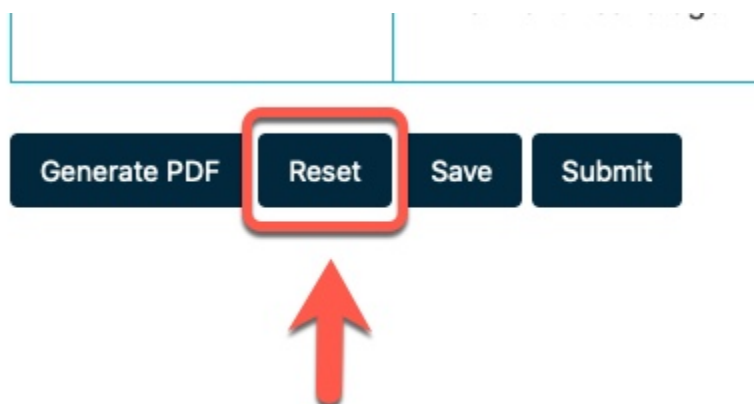
Page 5

Generate PDF
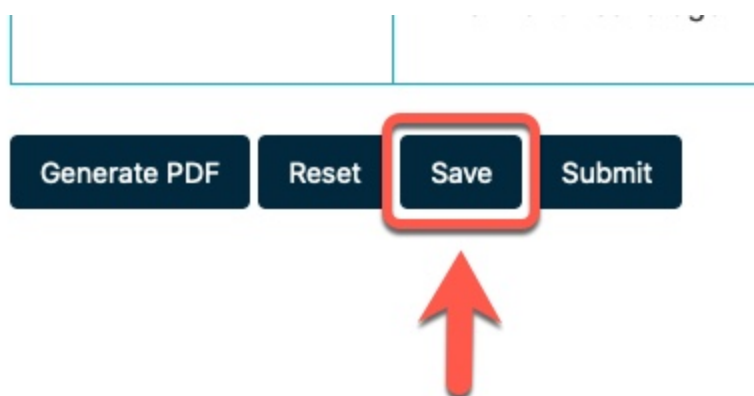
The Generate PDF button will open up a PDF copy of the form

Reset

The Reset button will clear the form of inputted content

Save

The Save button will save the form

Submit

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Page 6

The Submit button will allow you to submit the form for the next step in the workflow

My Tasks Navigation

Task Details Panel

By default the Task Details Panel will be collapsed

To open it, click the double arrow caret

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Page 7

Upon clicking the double arrows, the Task Details Panel will show

To close the Task Details Panel click the double arrow caret again

Submit

Step 1:

Click the **Submit** button

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Page 8
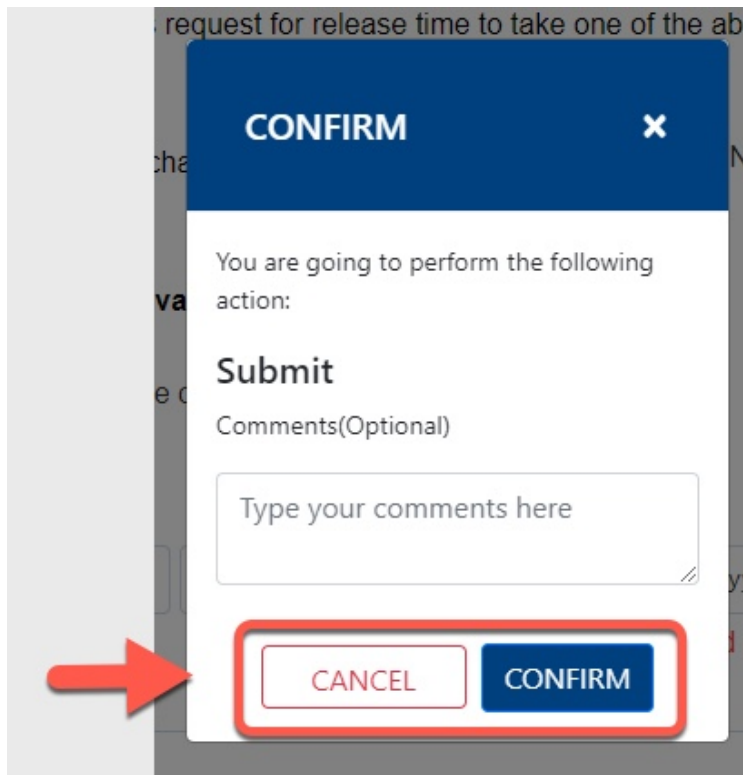
Step 2: (Optional)

Leave comments in the **Comments(Optional)** field
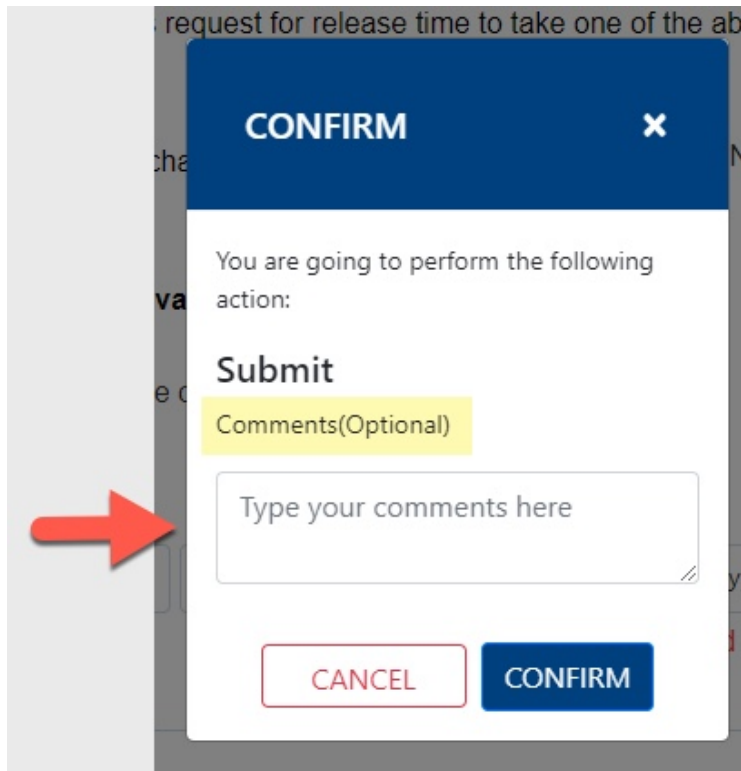
Step 3:

Click on the **Cancel** or **Confirm** button:

- Cancel to cancel submitting the document
- Confirm to proceed in submitting the document

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Page 9

Save

Step 1:

Click the **Save** button

If you have not completed the form (required fields), the page will not save and show what required fields are missing by noting in red

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Page 10

Form   Workflow Details

Faculty and Staff Employee Fee Waiver Application

Employee Information	**Immediate Supervisor Review**
School-Related Information	
Course Information	
Request Reimbursement of Application Fee	
Tax Implications	
Authorizations	
Immediate Supervisor Review And/Or Authorization	

Immediate Supervisor Review

1. Are you granting employee's request for release time to take one of the above fee waiver course?   ○ Yes ● No

2. Will the course(s) require a change in the employee's work schedule?   ○ Yes ○ No   [List days and times]

Immediate Supervisor Approval

☐ Please indicate that you have completed the review

This Field is a required field.

* Print Name	* Signature	* Date	* Recommend
		mm/dd/yyyy	● Approval ○ Denial
This Field is a required field.	This Field is a required field.	This Field is a required field.	

Comments

[   ]

Generate PDF

Once you have included all required fields, upon clicking the Save button, the screen will refresh with a Save confirmation message

✓

Saved

This task has been successfully saved

OK
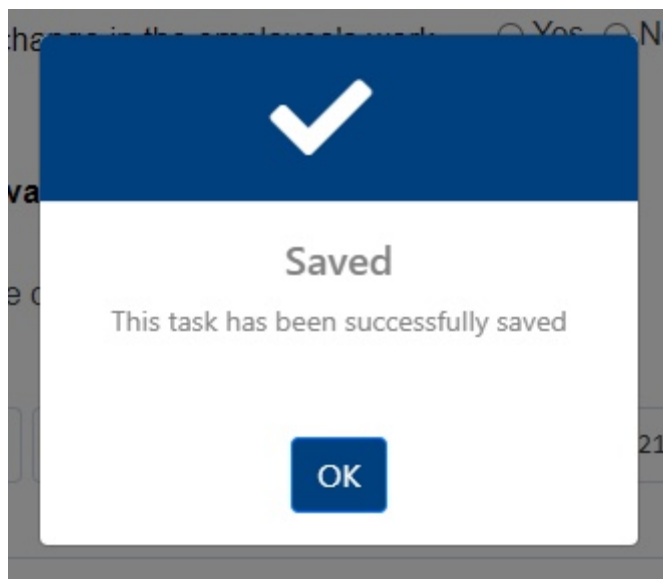
Delegate

To set a delegate (assign another person to process the document in question), you will need to specify the delegate

Step 1:

Click the **Delegate** button in the upper right hand corner
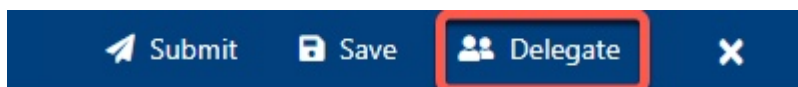
Step 2:

Click the **User** drop-down caret

Step 3:

Select the appropriate user to delegate to

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Page 12

Step 4: (Optional)

Leave comments in the **Comments(Optional)** field

Step 5:

Click on the **Cancel** or **Submit** button:

- Cancel to cancel submitting the delegate specification
- Submit to proceed in submitting the delegate specification

Exit

Step 1:

Click the **X** icon
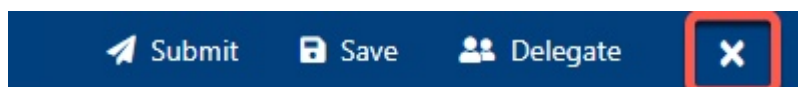
The screen will refresh to your **My Tasks** view

Forms Tabs

My Forms Tab

To search for a form:

A) Utilize the search bar

B) Utilize the page buttons for a manual search

Launch a form:

Click on the arrow that coordinates to the document you would like to launch

My Drafts Tab

Any saved documents that you have not submitted will show in the My Drafts tab.

⚠️ Note: You will not be able to view drafts saved by other users.

Locate draft:

A) Utilize the search bar

B) Utilize the page buttons for a manual search

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Page 16

Show Saved Form:

Click on the 'eye' icon

Start a new form (with current form data):

Click on the 'plus' icon

Delete:

Click on the 'trash' icon

My Tasks Tab

Viewing Tasks:

You can view the tasks by list view or icon view

   For list view, click on the list button

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Page 18

For icon view, click on the icon button

Locate task:

A) Utilize the search bar

B) Utilize the page buttons for a manual search

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Page 19

Open Task:

Check the box that coordinates to the tasks you would like to open

Click the **Open** button

The page will refresh to show your open document

In the upper right hand corner there are several buttons for your use:

- Submit
- Save
- Delegate
- Exit

Need More Help?

For questions or assistance, please contact HRDI at:

hrdievaluations@fullerton.edu