The eForms User Guide will cover completing evaluations and giving a user security access to that evaluation in order to share that eForm via TitanOnline.
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It is highly recommended that you use Internet Explorer 7 or Safari with eForms. It is also necessary to turn off your popup blocker when using eForms.

### Navigating to Evaluations eForms

**Step 1:**
Go to the campus Portal Login and Logon.

**Step 2:**
Click on the “Titan Online” tab

**Step 3:**
Click on “My WorkPlace” in the eContent box.

There are various eForms training guides on “Training Resources”

**Step 4:**
Select eForms - Human Resources on the left side under “My Workplace”

Click on Classification & Compensation under Human Resources Forms
**Step 5:**
Select the appropriate evaluation folder (i.e., Evaluation – Staff)

**Step 6:**
Select the appropriate evaluation (i.e., Staff Performance Evaluation Unit 2-5-7-9 - Distributed)
Completing an Evaluation eForm

**Step 1:**

Once an evaluation eForm template is selected it opens with your information automatically filled in.

Depending on your security and role, you may wish to fill out the eForm for another person in your department. In order to do this, replace your Empl ID with the Empl ID of the person for whom you are filling out the form. The system will then automatically populate the form with that person’s information.

The sections appearing with red box(es) are required fields. The eForm cannot be printed or saved unless all the required fields are filled.

You are only able to auto populate forms by filling in the lookup field for employees in the departments that you have security access to in CMS.

**Step 1a:**

Cut & Paste:

To copy from another evaluation or word document to an evaluation eForm

Copy:  Ctrl-C
Paste:  Ctrl-V
Cut:    Ctrl-X
**Step 2:**
Once you are done filling out the form, click to print the form.

The form will open in Adobe Acrobat reader and you can click to print.

At this point you can also print a static Adobe Acrobat copy of the evaluation to your desktop by clicking the button.
## Saving and Sharing an Evaluation eForm

### Step 1:
After printing the eForm, close the Adobe Acrobat reader window and click ![Save & Close](image) to save the Evaluation to the eForms database.

### Step 2:
The first time you save an eForm the window on the right appears.

**Note:** This window only appears the first time you click the ![Save & Close](image) button.

**Note:** To continue saving without sharing the eForm, click the ![Finish](image) button. The eForm will be saved to the eForms database.

To share the eForm, click the ![Add New](image) button.
**Step 3a:**

The Set Security – Select Users/Groups window opens

Click on **Users**

Put in the user name (first part of the campus user’s email before the @) in the box next to **Starts with:**

Click the **Search** button.

**Step 3b:**

The Select in field should be set to

**AD.FULLERTON.EDU**

Highlight the User

Click the **Accept** button.
Step 4:
The added User now has "View Content" access to the eForm.

If the added User only needs to "View Content" and not the ability to "Modify", proceed to Step 7 where it says "Click the Finish button." and then proceed to Step 8.

Otherwise, continue to Step 5.

Step 5:
To allow the User access to "Modify" the eForm:

Click on the User
Step 6a:
This screen will open in a new browser window.
Check the box next to Owner Control under Allow.

Step 6b:
This will check all of the boxes below.
Click the Accept button.
Step 7:

That window will close.

The security window now looks like this.

The User now has the ability to modify the form.

Click the Finish button.

Step 8:

Click the OK button.

The eForm has now been saved to the eForms database.
Retrieving and Adding Security to a Previously Saved Evaluation eForm

It is not necessary to change a form’s security for Human Resources or Finance staff to be able to view it. Individuals in central areas have access to all forms by default.

If you wish to allow another person (i.e. your supervisor) to view a saved/submitted form, you must update the form’s security permissions.

**Step 1:**
To change a saved eForm’s security and share it with others, navigate to the appropriate section under My Workplace.

For example, Evaluation eForms are in the

- Classification & Compensation folder under eForms - Human Resources.

For each section of forms, there is a corresponding Search section.

For example, to search for a saved Evaluation eForm you would click the

- Classification & Compensation eForm Search folder. Then clicking on

  Evaluation eForm Search allows you to search for any Evaluation Form that you have submitted or been given security to.

Select the search link that corresponds to the type of form you are searching for.
Step 2:
Leave the search criteria blank to search for all forms you have submitted in this category.

Otherwise, enter search criteria to narrow the search results.

Once the appropriate search criteria are entered, click Search.

Step 3:
A list of your forms will appear.

Check the box next to the form to update the security permissions.

Step 4a:
Select the Actions Menu. A drop-down list of actions appears.

Select Get Info.

Step 4b:
Select Security.
**Step 5:**
The current security permissions for the eForm appear.

Click **Add New** to give security permission to this eForm to another person.

**Step 6a:**
The Select in field should be set to **AD.FULLERTON.EDU**.

Select **Users** to give security permissions to one or more individual users.

**Step 6b.**
Put in the user name (first part of the campus user’s email before the @) in the box next to **Starts with:** then click **Search**.
Step 6c.
The search results appear in the box below the search criteria. Select the person(s) you wish to add and then click **Accept**.

If you wish to exit this screen without adding security permissions, click **Close**.

Step 7:
The added User now has “View Content” access to the eForm.

If the added User only needs to “View Content” and not the ability to “Modify” the eForm, proceed to **Step 9a** where it says “Click to save the updates.” and then proceed to **Step 9b**.

Otherwise, continue to **Step 8a**.

Step 8a:
This screen will open in a new browser window.

Check the box next to **Owner Control** under **Allow**.
Step 8b:
This will check all of the boxes below.

Click the **Accept** button.

Step 9a:
Click **Apply** to save the updates.

Step 9b:
You may click on **Add New** if you want to give security permissions to another person or group. Be sure to click on **Apply** after each addition to save the change.

Click **Exit** when you are finished adding security permissions for this form.
Copy AS: Copy an Evaluation eForm

Sometimes it might seem easier and save time to make a copy of the previous year’s evaluation, modify it, and then save it as a new evaluation for this year. In order to do that, you must use the “Copy AS” feature.

**Step 1:**

Navigate to the Evaluation Search template.

In the “My WorkPlace” window, go to the [Retrieved Human Resources Forms](#) and click on the [Classification & Compensation eForm Search](#).

**Step 1a:**

Click on the [Evaluation eForm Search](#).

**Step 1b:**

Evaluation eForm Search Template

Put in necessary search criteria and click the Search button.
**Step 2:**
A list of your eForms will appear.
Check the box next to the form.

**Step 2a:**
Select the Actions Menu. A drop-down list of actions appears.
Select Copy As.

**Step 2b:**
Click the Finish button.

*Note:* The document Title has temporarily changed to have "- copy" appended to the end of it so that you can tell which is the copy. The copy is now a totally new eForm that you will open and change the Start_Year and End_Year indexes for as well as any other items that need to be changed for this year.

**Step 2c:**
You can tell which is the copy because of the "- copy" appended at the end of the title.
Open the copy
Change the Start_Year and End Year.
Cut and paste and make any other necessary changes.
Click Save & Close to save your changes to the eForm.
Step 2c:

The copy is now a totally new Staff Performance Evaluation eForm. You can tell the difference between the two evaluations by the Index fields—particularly the two year fields (Start_Year and End_Year).