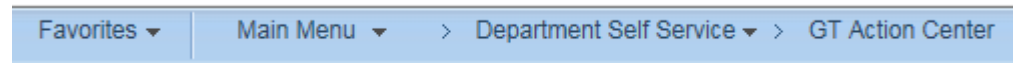


ePAF – Action Center

Navigation:



What about the worklist?

The worklist will remain available to you, the action center is simply an easier method for reviewing forms and taking actions on them.

Recommended usage:

Quick and easy one stop shopping to review and approve open forms, filter on the highest priority or on a specific name or form type. Allows you to evaluate the form at a high level and approve it.

Major points of interest:

- Allows you to review all form on one page
- Allows group or individual approvals (actions)
- Allows easy access to the form itself (Now a single page for approvers).
- Displays key high level details on each form
- Displays Comments without leaving the action center.

Below are as following:

- Details on Usage
- Filter list and usage
- Action and usage
- Details displayed for transactions

Details on Usage:

Home page of Action Center

Navigation: Favorites ▾ | Main Menu ▾ > Department Self Service ▾ > GT Action Center

DEV Hello Sue Search

UMass Action Center

User ID: SUM10097350

Scan summaries of forms awaiting your action, drill into more detail or the form itself, and work multiple forms at once. The page displays a maximum of 100 forms.

Please add a comment if you are returning the form(s) to the initiator or denying the grade change.

You can approve forms individually or follow these steps under the Actions section:

- 1) Click on Select All (or select individual checkboxes)
- 2) Specify the Action
- 3) Set the Action on selected forms
- 4) Click on Submit All

Click on the Refresh button to update the list of the forms. Please note: it can take several minutes for forms to be processed if you withdraw or approve a large number of forms.

Filter List

Form Type	<input type="text"/>	Start Date	<input type="text"/>	<input type="button" value="Apply Filter"/>
Last Name	<input type="text"/>	End Date	<input type="text"/>	<input type="button" value="Clear"/>

Forms

11 of 11 Filtered 11 of 11 Displayed 0 of 11 Selected

Actions

[Select All](#) [Clear Selections](#) Action [Set Action on Selected eForms](#)

Filter List and usage:

Filters allow the approver to focus on certain types of forms, a specific employee or a range of dates.

Filter List

Form Type	<input type="text"/>	Start Date	<input type="text"/>	<input type="button" value="Apply Filter"/>
Last Name	<input type="text"/>	End Date	<input type="text"/>	<input type="button" value="Clear"/>

Enter a filter and click “Apply Filter” (See below)

Filter List

Form Type	HIRE	Start Date	<input type="text"/>	<input type="button" value="Apply Filter"/>
Last Name	<input type="text"/>	End Date	<input type="text"/>	<input type="button" value="Clear"/>

Forms

8 of 11 Filtered 8 of 8 Displayed 0 of 8 Selected

Note the count 8 of 11 Filtered, this tells you the # of forms you have to approve which meet the Filter.

Please note the other filters available work in a similar way.

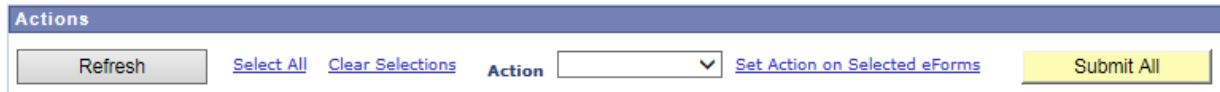
To clear out our “Filtered rows” remove your filters and click “Clear”

Action usage:

The “Group” actions allow you to mark many rows for update at the same time, either to approve or to return back to the initiator.

Once marked you can submit them all.

Below – I will show you how to use it and also how to remove one or more forms from the “Submit All” process should you chose to upon further review.



The screenshot shows a toolbar with the following elements from left to right: a 'Refresh' button, a 'Select All' link, a 'Clear Selections' link, an 'Action' dropdown menu, a 'Set Action on Selected eForms' link, and a 'Submit All' button.

Sequence:

Step 1:

Select all or Clear Selections (Check box on bottom right is impacted), this controls what the Group Actions will update and control the submit all button function.



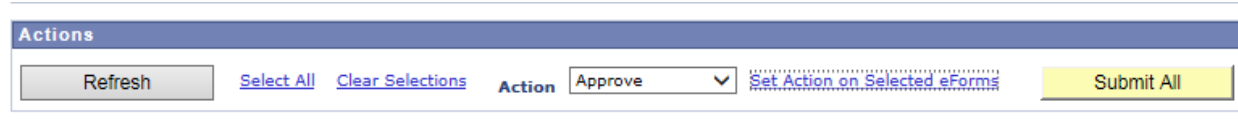
The screenshot shows a single row in a table. At the top, it says 'Form: Rodrigue, Matthew'. Below that is a 'More Info' button. Underneath is an 'Action' dropdown menu. To the right of the dropdown is a 'Submit' button and a checked checkbox.

Step 2:

Chose the action from the drop down

- Approve
- Back to Initiator

To apply action to selected forms (step 1) click “Set Action on Selected eForms”



The screenshot shows the same toolbar as in the first image, but now the 'Action' dropdown menu is set to 'Approve'. The 'Set Action on Selected eForms' link is now highlighted with a dotted border.

Each form will “selected” step 1 check box will be updated with the following



The screenshot shows the same form row as in the second image, but now the 'Action' dropdown menu is set to 'Approve' and the checkbox is checked.

Step 3 (optional):

Should you choose not to process one form from our selected group simply uncheck the checkbox



Find First 1-11 of 11 Last

[Form: Rodrique, Matthew](#)

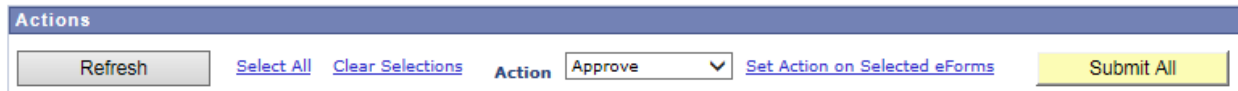
More Info

Action

Approve Submit

Step 4:

Click the Submit All button and you are done, this button also can be found at the bottom of the scrollable area. IT will only work with the checkbox (step 1), so if you'd like to hand update a number of them and submit all at once that's fine, but please check the box manually yourself.



Actions

Refresh [Select All](#) [Clear Selections](#) Action Approve [Set Action on Selected eForms](#) Submit All

Details displayed for transactions

70912 Job Change		Employee Group: Departmental Assistants	
Effdt:	2015-06-16	Action:	Data Change
Employee	Harrington-Abend,Elijah	Reason:	Reappointment
Employee ID:	10164850		

[Form: Harrington-Abend, Elijah](#)
[More Info](#)

Action

[Submit](#)

75779 Hire		Employee Group: Students	
Effdt:	2015-08-30	End Date:	2016-05-03
Employee:	Samuel,Jarell	Hourly Comp	9
Employee ID:	10191170	Std Hours:	20
Action:	Hire	Department:	Admissions Office
Job Code	Student Employee		

[Form: Samuel, Jarell](#)
[More Info](#)

Action

[Submit](#)

Details displayed are to give you a high level view of the change you are being requested to approve, in some cases the data display may allow you to approve directly from the action center itself.

Top left to right

Display form#, type of form and employee group associated with the form

70912 Job Change		Employee Group: Departmental Assistants	
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Right side of the transaction displayed:

Consistent details:

All forms display employee ID, Name, Action, Action Reason and effective date

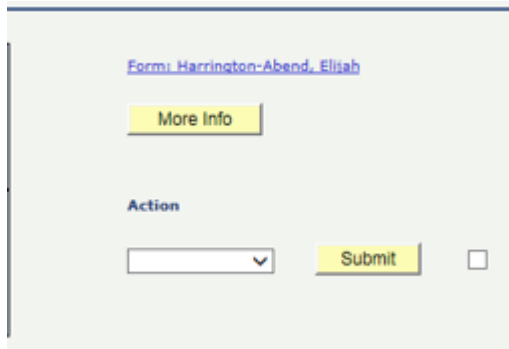
70912 Job Change		Employee Group: Departmental Assistants	
Effdt:	2015-06-16	Action:	Data Change
Employee	Harrington-Abend,Elijah	Reason:	Reappointment
Employee ID:	10164850		

Changeable details are:

Form dependent and were chosen to provide value to the approver

	Department	Job Code	Std Hrs	Hourly Comp	End Dt
New	Blue Wall Cafe	Departmental Assistant	40	12	2015-07-18
Old	Blue Wall Cafe	Departmental Assistant	40	12	2015-06-15

Left side of the transaction displayed allows you to perform approvals and review more data as you require:



The screenshot shows a user interface for a transaction. At the top, there is a blue hyperlink labeled "Form: Harrington-Abend, Elijah". Below this is a yellow button labeled "More Info". Underneath is the label "Action" followed by a dropdown menu with a downward arrow. To the right of the dropdown is a yellow button labeled "Submit" and a small, empty square checkbox.

- The name hyperlink, allows you drill directly into a single page scrollable form (New to this release) to review details and to take actions should you deem appropriate.
- More Info, is a display of any comments or prior approvals
- Action, you can select to return a form back to the initiator or approve the form when chosen
 - When an action is chosen you must click Submit (Immediate approval) or you may check the box immediately to the right of the button, allowing you to use the "SUBMIT ALL" (Group approval) button found within the top of the action center or at the bottom of the scrollable area in the action center.