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:

- x   Allows you to review all form on one page

- x   Allows group or individual approvals (actions)

- x   Allows easy access to the form itself (Now a single page for approvers).

- x   Displays key high level details on each form

- x   Displays Comments without leaving the action center.

Below are as following:

- x   Details on Usage

- x   Filter list and usage

- x   Action and usage

- x   Details displayed for transactions

Details on Usage:

Home page of Action Center

Filter List and usage:

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

Enter a filter and click "Apply Filter" (See below)

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

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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.

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.

Step 2:

Chose the action from the drop down

        x   Approve

        x   Back to Initiator

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

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

Step 3 (optional):

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

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.

Details displayed for transactions

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

Right side of the transaction displayed:

Consistent details:

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

Changeable details are:

Form dependent and were chosen to provide value to the approver

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

- x 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.

- x More Info, is a display of any comments or prior approvals

- x Action, you can select to return a form back to the initiator or approve the form when chosen

  - o 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.