

Introduction

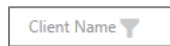
The System Pending Workflow Dashboard is available to monitor workflow where service users are designated as assigned users. There are three tabs on the screen. They are:

- Transaction List
- My Transactions
- Workflow Routes

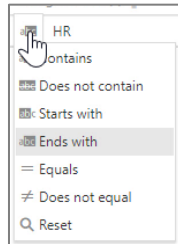
System Pending Workflow Dashboard

Navigate to System Management > System Pending Workflow Dashboard. The functionality on this screen will include the functions of the Data grid with features such as:

- Filter on each column heading



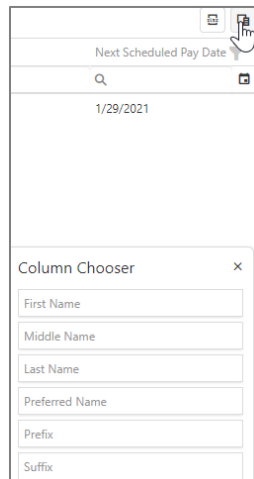
- Search on each column heading



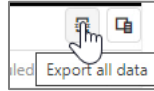
- Drag columns



- Column Chooser



- Export Data



The first tab is titled **Transaction List**. Any Pending Workflow where an Assigned User includes a Service User Group will be listed.

| System Pending Workflow Dashboard | | | | | | | |
|--|-----------------------|------------------|----------------|------------------|-------------------|-----------|-------------------------|
| Transaction List My Transactions Workflow Routes | | | | | | | |
| ▼ Expand All Groups ▲ Collapse All Groups ↻ Clear Grouping/Filters | | | | | | | |
| Drag a column header here to group by that column | | | | | | | |
| Service Team | Client Name | Transaction Type | Employee Name | Step Name | Assigned User(s) | Pay Group | Next Scheduled Pay Date |
| | Joan Test Company Inc | Name / Contact | Daniel L Adams | Pending Approval | Service User - HR | Biweekly | 1/29/2021 |

The second tab is titled **My Transactions**. If the Service Bureau is assigned to the Assigned User group, the workflow transaction will be available for approval/rejection from this screen.

- Click on the **Employee Name**. The system will navigate to Employee Admin Tools > Employee Administration > Pending Workflow.
- Select the **Transaction Type** the service user wants to approve or reject.

| Pending Workflow | | | | | | | Help | |
|--------------------------------|-------------------|------------------|------------------|-----------|-----------------|-----------------|--------|--------|
| Transaction Type: All | | Filter | | | | | Report | Export |
| * Select a row to view details | | | | | | | | |
| Transaction Type | Date/Time | Step Name | Step Description | Pay Group | Employee Number | Employee Name | | |
| Name / Contact | 1/23/2021 9:35 AM | Pending Approval | | Biweekly | 1004 | Adams, Daniel L | | |

- The Service Bureau user will be able to Approve or Reject the transaction.

| Pending Workflow | |
|---|-----------------------------------|
| Transaction 1 of 1 ◀ Previous Next ▶ Approves ▼ Process View List | |
| Daniel L Adams Employee#: 1004 Status: Active | |
| Pay Group: Biweekly Hire Date: 9/15/1981 | |
| Name / Address Details | >Name / Address Updates - Pending |
| * First Name: Daniel | * First Name: Daniel |
| Preferred Name: | Preferred Name: |
| Middle Name: L | Middle Name: L |
| * Last Name: Adams | * Last Name: Adams |
| Prefix: | Prefix: |
| Suffix: | Suffix: |
| Address: 2960 Lafayette Ave | Address: 167 Marshall St |
| * Zip Code: 10465 | * Zip Code: 10465 |
| City: Bronx | City: Bronx |
| State: New York | State: New York ▼ |
| Residence Location: NY0052010 | * Residence Location: NY0052010 |
| Marital Status: Single | Marital Status: Single ▼ |

The third tab is titled **Workflow Routes**. If you select the **Workflow Name**, the system will automatically navigate to Client Management > Workflow Setup > Workflow Routes.

System Pending Workflow Dashboard

Transaction List My Transactions **Workflow Routes**

▼ Expand All Groups ▲ Collapse All Groups 🗑 Clear Grouping/Filters

Drag a column header here to group by that column

| Service Team ▼ | Client Name ▼ | Workflow Category ▼ | Workflow Name ▼ | Workflow Description ▼ | Transaction Type(s) ▼ | Assigned User(s) ▼ | Status ▼ |
|----------------|-----------------------|---------------------|-------------------|------------------------|-----------------------|--------------------|----------|
| | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 |
| | Brian's Crossfit | Offboarding | Release 7.1 Test | Release 7.1 Test | Offboarding | Multiple | Active |
| | Joan Test Company Inc | Employee Updates | EE to SB User -HR | Name/Contact Updates | Name / Contact | Multiple | Active |

Workflow Routes

Status: **Active** ▼

| Name | Category |
|-------------------|------------------|
| EE To HR | Onboarding |
| EE to SB User -HR | Employee Updates |

Routes Process

+ Add New ✎ Edit 🗑 Delete 🔄 Refresh 💾 Save 🚫 Cancel

Identification

Workflow Category: Employee Updates

* Name:

* Description:

Inactive

Associated Transactions

Active: EE to Service User - HR
Inactive: No inactive transactions.