

Introduction

Service User Groups can be assigned users in workflow process. In order to create groups of user types, navigate to Security > Service User Groups.

Service User Groups

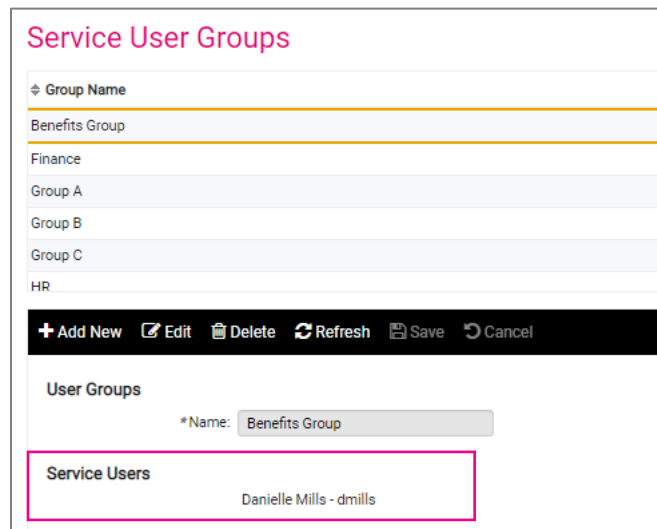
Remember that a Service User Group can be part of the workflow process the same as a Client User Group. Therefore, when thinking of a Name to add consider the functionality of that group. Here are some examples:

- Benefits
- Finance
- HR

Navigate to Security > Service User Group.

- Click on the **Add New** icon.
- **Name:** Add a group name.
- Click on **Save**.

Note: Once Service users are assigned to that group, the name will appear under Service Users.



Assigning Service Users

Navigate to Security > Service User Setup. You are able to add a new user or edit an existing user to add to the Service Group created.

- Click **Add New** or **Edit**.
- **Service Group Access:** All user groups created will be available for selection.
- **Service User Groups:** Check all groups the Service User should have access to.
- Click on the **Save** icon.

Service User Setup

User Name	Email	Last Activity Date	Last Login Date	Roles
jjones1	jjones@isolvedhcm.com	7/2/2020 3:56:00 PM	12/21/2019 9:51:49 PM	Basic Service User
jjones2	jjones@isolvedhcm.com	1/13/2021 6:49:11 PM	1/13/2021 6:48:44 PM	SB User - Super User
jjRCQA	jjones@isolvedhcm.com	11/2/2020 2:37:51 PM	11/2/2020 2:37:51 PM	SB User - Super User, Basic Service User, SB User -
JKoroncai	JKoroncai@isolvedhcm.com	1/13/2021 9:49:57 AM	1/13/2021 9:49:57 AM	SB User - Super User, Basic Service User
jlayne	jlayne@isolvedhcm.com	9/21/2020 6:12:27 PM	2/26/2020 7:06:54 PM	SB User - Super User, Basic Service User, SB User -
imcalister	imcalister@isolvedhcm.com	1/23/2021 8:01:15 AM	1/23/2021 8:01:15 AM	SB User - Super User, Basic Service User, SB User -

+ Add New Edit Delete Refresh Save Cancel Revoke API Tokens

Service User Role Membership Contact Report Group Access **Service Group Access**

Service User Groups

- Benefits Group
- Group A
- Group B
- Group C
- HR
- Finance

Once the addition to the Service User Group is made, the Service User Groups screen will add the Service User added to that group.

Service Users

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Workflow Routes

Navigate to Client Management > Workflow Setup > Workflow Routes.

- Click on the **Add New** icon.
 - **Workflow Category**: Make your selection.
 - **Name**: This setting is discretionary.
 - **Description**: This setting is discretionary.
 - Click on the **Next** icon.
 - **Assigned User Type**: Add the initiator of the transaction.
- Note**: Remember to add your Email template if a Notification or approval is required.

Email

*User Type: Service User - HR

*Template: Complete Transaction

Add New

Save Cancel

- **Pending Approval:** Select the Assigned User Type. All Service User Groups created will be available for selection.

*Assigned User Type	Allow Edits	*Action Taken	*Next Step
Service User - HR	<input type="checkbox"/>	Approves	Complete - Transaction Approved
Assigned Manager		Rejects	Complete - Transaction Rejected

- Complete the Steps.
- Click on the **Save** icon.

Employee Self-Service

Once the change is made by the Employee in Self-Service based on the setup above, the Service User will receive the Email Template indicating a change was made.

Joan Test Company Inc Daniel L Adams has made a change. Please approve or reject

Any Service User assigned to the Service User Group will be able to Approve or reject the transaction. The Service User will navigate to either Employee Admin Tools > Employee Administration > Pending Workflows or System Pending Workflow Dashboard. Please refer to the [System Pending Workflow Dashboard](#) article in the University Library.

Note: If notification is used in the Workflow Process, the Service User will only receive the Email to notify them of the transaction.