

# GT Action Center



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## What is the GT Action Center?

The GT Action Center is a supplementary interface that enables eform approvers to perform bulk form actions for pending eforms. eForm approvers can use the GT Action Center to view eforms they would normally see in their worklist, with the added benefit of filtering and performing bulk actions, like adding comments or approving multiple eforms all at once.

Currently, OUHSC only allows the Additional Pay eform and Job Change ePAF in the GT Action Center. The Job Change ePAFs available through the GT Action Center only include pay change and funding change actions. These eforms will continue to also be available through the worklist.

## Navigation

Main Menu > Department Self Service > GT Action Center

## Action Center

The screenshot displays the 'Action Center' interface. At the top, there is a 'User ID' field. Below it, a message states: 'Here you can scan summaries of all eForms awaiting your action, drill into more detail on the eForm itself, and work many eForms at once.' A 'Filter List' section contains search criteria for Form Type, Empl ID, Department, and Pay Period End, with 'Apply Filter' and 'Clear' buttons. The 'Forms' section shows '3 of 3 Filtered', '3 of 3 Displayed', and '0 of 3 Selected'. Below this is a 'Comments' text area and an 'Actions' section with buttons for 'Refresh', 'Select All', 'Clear Selections', an 'Action' dropdown, 'Set Action on Selected eForms', and 'Submit All'.

**Forms Needing Action**

**227637 Job Change**

Name:	Wayne,Bruce	Effdt:	6-11-2017
Empl ID:	506743	Action Reason:	JED DST   PAY INC
Empl Group:	Faculty	Comp:	Biweekly \$2,892 - \$1,892
Department:	COM800 - Dept of Urology	Annual Comp:	\$70,000 - \$44,000
Job Code:	1773 - Prof,Asoc	FTE:	0.75
From:	Thompson,Lisa Marlene	Affiliate FTE:	0.25
		Affiliate:	Y

**HR Account Code**

HR Account Code	GL Acct	Org	Project/Grant	Fund	Prog	Subclass	Amount
000048782	511021	COM800	COM27012	CLNOP	00111	M7521	\$846.15
000056254	511021	COM800	(None)	HSPRM	00111	M7521	\$846.15

**227639 Job Change**

Name:	Flintstone,Fred	Effdt:	6-11-2017
Empl ID:	517618	Action Reason:	JED DST   PAY INC
Empl Group:	Faculty	Comp:	Biweekly \$3,077 - \$5,077
Department:	COM800 - Dept of Urology	Annual Comp:	\$80,000 - \$132,000
Job Code:	1771 - Prof	FTE:	1
From:	Thompson,Lisa Marlene	Affiliate FTE:	0
		Affiliate:	N

## Filter List

The Filter List group box allows the user to filter the eforms to be reviewed. Clicking the magnify glass to the left of each field can help with the search and based on the user's security.

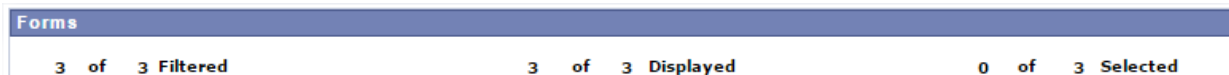


The screenshot shows a 'Filter List' group box with a blue header. Below the header are five search fields: 'Form Type' (a dropdown menu), 'Department', 'Empl ID', 'Name', and 'Pay Period End'. Each field has a magnifying glass icon to its right. To the right of the search fields are two buttons: 'Apply Filter' and 'Clear'.

- Form Type – Displays all possible form types with in the Action Center.
- Department – Search by department
- Empl ID – Search for someone specific using his/her employee ID
- Name – Search by the employee's name
- Pay Period End – An additional field to use whenr searching Additional Pay eforms
- 'Apply Filter' button – Fetches all pending eforms based on filter criteria
- 'Clear' button – Clears all filter criteria

## Forms

The Forms group box offers an at-a-glance summary of the eforms in the users Action Center.

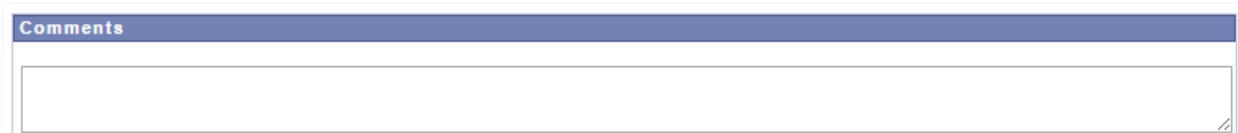


The screenshot shows a 'Forms' group box with a blue header. Below the header, there are three summary statistics: '3 of 3 Filtered', '3 of 3 Displayed', and '0 of 3 Selected'.

- Filtered – Of the total pending eforms for the user, "Filtered" indicates the number of eforms returned by the filter.
- Displayed – Indicates the number of eforms displayed in the *Forms Needing Action* area located in the last section of the Action Center.
- Selected – Of the total filtered eforms available, "Selected" indicates the number of eforms selected for bulk action.

## Comments

The Comments group box allows users to configure a comment which will appear on all eforms to which a bulk action applies. For example, a user may want to add a comment that "this form was approved as part of a bulk approval action."



The screenshot shows a 'Comments' group box with a blue header. Below the header is a large, empty text entry field for adding a comment.

- Comment Box – Allows plain text entry.

## Actions

The Actions group box displays actions available to perform on the eforms returned by the filter, if any. Note that many of the actions taken in this group box will be reflected in the *Forms Needing Action* area in the section below.

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

- 'Refresh' button – Refreshes the filter results, and also clears the *Forms Needing Action* center of those that have been worked.
- Select All – Selects all eforms for bulk action.
- Clear Selection – Deselects all selected eforms.
- Action dropdown – Indicates the actions available for bulk action. Use the dropdown arrow to view and select an actions.
- Set Action on Selected eForms – Updates the intended Form Action for all forms that have been selected.
- 'Submit All' button – Executes the Form Action form all selected forms. This button also appears at the bottom of the page, underneath the *Forms Needing Action* area.

## Forms Needing Action

The Forms Needing Action group box displays a customizable summary of information for all eforms returned by the filter, if any, and provides the opportunity to act on a list of individual eforms all at once.

The 'Forms Needing Action' interface displays two job change forms. Each form includes a summary of employee information, a table of financial data, and a set of action buttons.

**Form 227637: Job Change**

Name: Wayne, Bruce      Effdt: 6-11-2017  
 Empl ID: 506743      Action/Reason: JED DST | PAY INC  
 Empl Group: Faculty      Comp: Biweekly \$2,692 > \$1,692  
 Department: COM800 - Dept of Urology      Annual Comp: \$70,000 > \$44,000  
 JobCode: 1773 - Prof,Asoc      FTE: 0.75  
 From: Thompson, Lisa Marlene      Affiliate FTE: 0.25  
 Affiliate: Y

HR Account Code	GL Acct	Org	Project/Grant	Fund	Prog	Subclass	Amount
000048782	511021	COM800	COM27012	CLNOP	00111	M7521	\$846.15
000056254	511021	COM800	(None)	HSPRM	00111	M7521	\$846.15

Action buttons: [Form: Wayne, Bruce](#), Comments, Distribution, Action dropdown, Submit.

**Form 227639: Job Change**

Name: Flintstone, Fred      Effdt: 6-11-2017  
 Empl ID: 517618      Action/Reason: JED DST | PAY INC  
 Empl Group: Faculty      Comp: Biweekly \$3,077 > \$5,077  
 Department: COM800 - Dept of Urology      Annual Comp: \$80,000 > \$132,000  
 JobCode: 1771 - Prof      FTE: 1  
 From: Thompson, Lisa Marlene      Affiliate FTE: 0  
 Affiliate: N

HR Account Code	GL Acct	Org	Project/Grant	Fund	Prog	Subclass	Amount
000020165	511021	COM800	(None)	STATE	00111	M7518	\$1,000.00
000051466	511021	COM800	(None)	HSPRM	00111	M7518	\$4,076.92

Action buttons: [Form: Flintstone, Fred](#), Comments, Distribution, Action dropdown, Submit.

### eForm Link

The GT Action Center provides a quick glance option as opposed to opening every eform in the worklist to approve. If more information is needed, click on the blue link with the employee's name. In the screen shot above, one of the blue links is [Form: Wayne, Bruce](#). Clicking this link will open up the entire ePAF.

### Chartfield Display

The section that displays the chartfield spread(s) and account code(s) has room to view five (5) lines of information. If there are more than five lines, the 'Distribution' button (currently grayed out) will be highlighted in yellow for the user to click on to view all the funding lines.

### Comments

If there is a comment on the eform, the 'Comments' button will be highlighted in yellow for the user to click on to view all comments.

### Action Dropdown

This dropdown indicates the actions available for the particular eform, and the value selected only applies to the selected eform.

### Selected Checkbox

To select a specific eform click on the check box located to the right of the 'Submit' button.

### Submit Button

Executes the selected eform, based on the chosen action provided by the dropdown box. If the 'Submit' button is grayed out, it means that the eform is no longer actionable.