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
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.

- 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 when 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.

- 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.”

- 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.

- ‘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.
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.