In/Outboxes

Human Resources Front End

How-To Guide

HR Front End Training Team

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

In/Outboxes

HR Front End

How-To Guide

Revision Information

Guide ID: In/Outboxes

Revision Date: September 23, 2009

Version: 1.0

HR Front End In/Outboxes Quick View

1	• Accessing Transactions from the In/Outboxes
2	• Using Presets and Filters
3	• In/Outbox User Preferences

TABLE OF CONTENTS

Introduction

This training guide covers the In/Outboxes of the HR Front End. In this guide you will learn:

- Accessing transactions from the In/Outboxes.
- Setting presets and filters.
- Setting User Preferences for the In/Outboxes.

Conventions Used in this Guide

Indicates a **Note** or additional information that might be helpful to you.

Indicates a **Hint** such as a tip, shortcut, or additional way to do something.

Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.

Accessing Transactions from the In/Outboxes

The purpose of the In/Outboxes is to locate transactions and their view statuses. This section of the HR Front End is divided into four screens: My Inbox, Group Inbox, My Outbox, and Group Outbox.
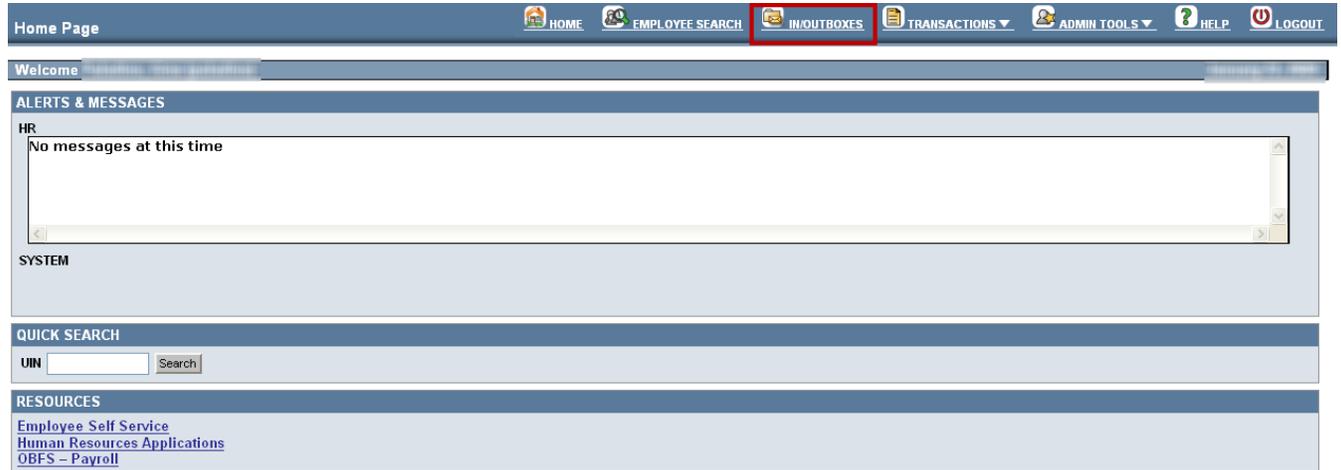

Figure 1: Accessing the In/Outboxes

My Inbox

My Inbox contains transactions that the user has ownership of (either by initiating the transaction himself or herself, taking ownership of it, or another user sent the transaction directly to them)

To open a transaction from **My Outbox**:

1. Select **In/Outboxes**

    In/Outboxes opens to the screen that was accessed last

2. Select **My Inbox** radio button

    *A list of transactions in **My Outbox** is displayed.*

3. Select the transaction by clicking on it once (which will highlight the transaction)

    Transaction Row is highlighted in Blue.

4. Click the **Select** button

    Transaction is opened and displayed.

> **NOTE**: You can also open a transaction by double-clicking on the transaction from **My Inbox.**

Figure 2: Accessing Transactions from My Inbox

Group Inbox

The **Group Inbox** contains transactions that have been routed/sent to a group of individuals with similar security permissions. In order to access transactions from the **Group Inbox**, users must take ownership of them.

In order to access and take ownership of transactions in **Group Inboxes**:

1. Access the Group Inboxes, by selecting the **Group Inboxes** radio button

2. Select the transaction by clicking on it once (which will highlight the transaction)

3. Click the **Take Ownership** button

> **NOTE**: For most transaction types, you can also double-click the transaction, and click **Take Ownership** from the Employee Record View.

Figure 3: Accessing Transactions from Group Inboxes

My Outbox

My Outbox allows users to view the statuses of all transactions that have moved out of their My Inbox. **My Outbox** contains:

- Transactions on which the users has previously owned and worked
- Transactions which the users has sent down the approval path with a Route command
- Transactions meeting the above criteria that are still in the system

In order to access transactions in **My Outbox**:

1. Access the My Outbox, by selecting the **My Outbox** radio button
2. Select the transaction by clicking on it once (which will highlight the transaction)
3. Click the **Select** button (which takes users to a read-only version of the transaction)

Figure 4: Accessing Transactions from My Outbox

Group Outbox

The **Group Outbox** allows users to view the statuses of all transactions that have been processed by themselves or others with the same security permissions group. **Group Outbox** contains:

- Transactions on which the user worked (had ownership of)
- Transactions on which the user could have could have worked (was in the Group Inbox at one time but they did not "own")

In order to access transactions in **Group Outboxes**:

1. Access the Group Outboxes, by selecting the **Group Outboxes** radio button

2. Select the transaction by clicking on it once (which will highlight the transaction)

3. Click the **Select** button (which takes users to a read-only version of the transaction)

Figure 5: Accessing Transactions from Group Outboxes

Filter and Preset Chooser

The **Filter and Preset Chooser** in the In/Outboxes allows users to both create filters for the transactions that are displayed in the In/Outboxes and create presets that they can apply at any time that they choose.

The following fields will be displayed to let users know what is currently being displayed in their In/Outboxes:

- **Personal Preset in Use** – this area allows users to see if they currently are applying a preset to the list of displayed transactions.
- **Criteria for Listed Transactions** – this area allows users to see which criteria are being shown for the transactions that are listed.

Showing and Hiding the Filter and Preset Chooser

In order to show the Filter and Preset Chooser:

- Click the **Show** Filter and Preset Chooser button

In order to hide the Filter and Preset Chooser:

- Click the **Hide** Filter and Preset Chooser button (which appears when the Filter and Preset Chooser is being displayed)

Figure 6: In/Outbox Fields

If the **Filter and Preset Chooser** button is clicked and the **Filter and Preset Chooser** is displayed, users have the option of using one or more of the following criteria to serve as a filter for the transaction list:

- **Transaction Type**
- **Route Stop Role**
- **Route Stop Action**
- **Route Stop Level**
- **E-Group**
- **UIN**
- **Campus**
- **COA**
- **College** – to select more than one, hold down the CTRL key when selecting
- **Department** - to select more than one, hold down the CTRL key when selecting
- **Organization** - to select more than one, hold down the CTRL key when selecting

The **Filter List** button will allow users to use the current filter settings to apply a temporary filter to the transaction list.

The **Reset Filter** button will reset the filter choices to the default settings.
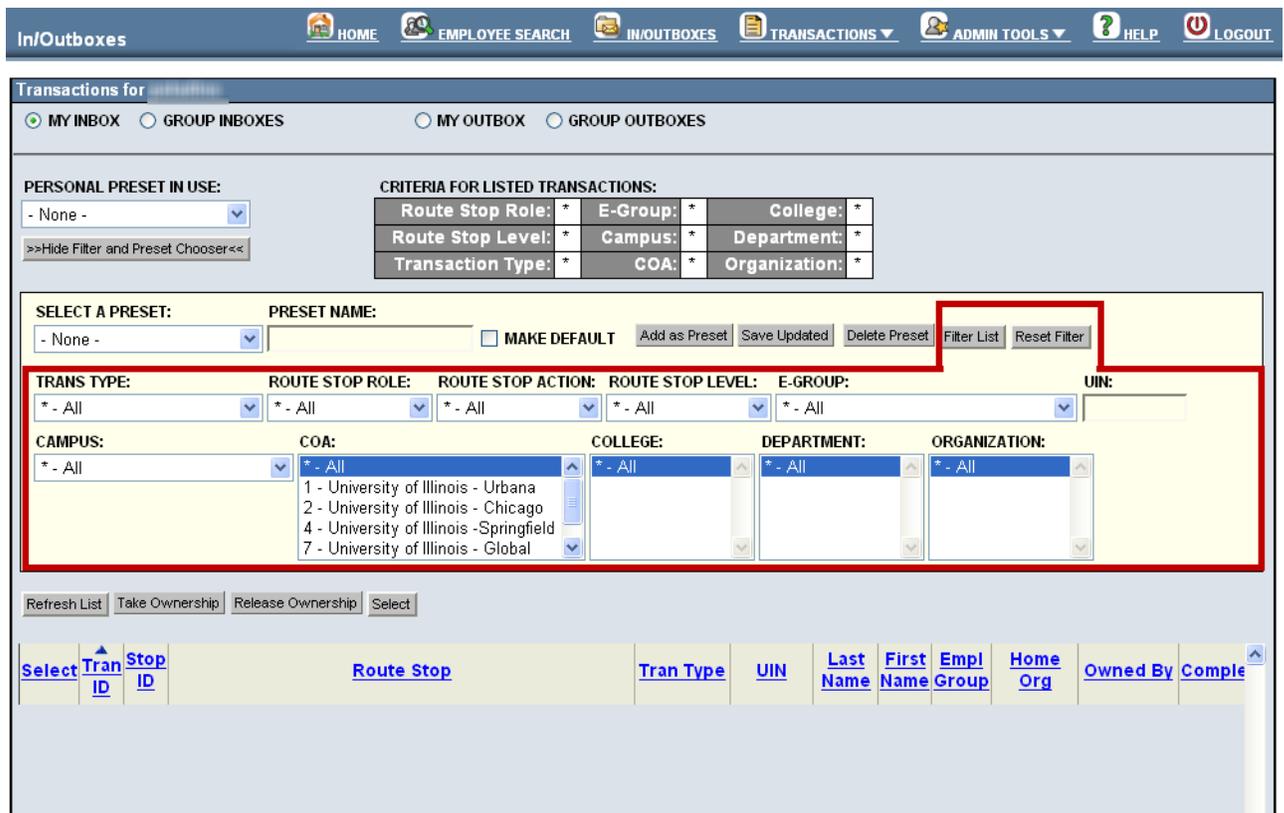

Figure 7: In/Outbox Filter

Users are also able to create and use presets for the transaction list in the In/Outboxes.

Fields:

- **Select a Preset** – allows users to select from a previously created preset to apply to the transaction list
- **Preset name** – allows users to create a new preset with the filter fields and enter a specific preset name that they can apply at a later time
- **Make default** – allows users to declare a certain preset to be the default setting for the In/Outbox transaction list

Buttons:

- **Add as Preset** – allows users to add a filter as a preset that they can access later
- **Save updated** – allows users to make updates to a preset that they have
- **Delete Preset** – allows users to delete any presets that they wish to remove

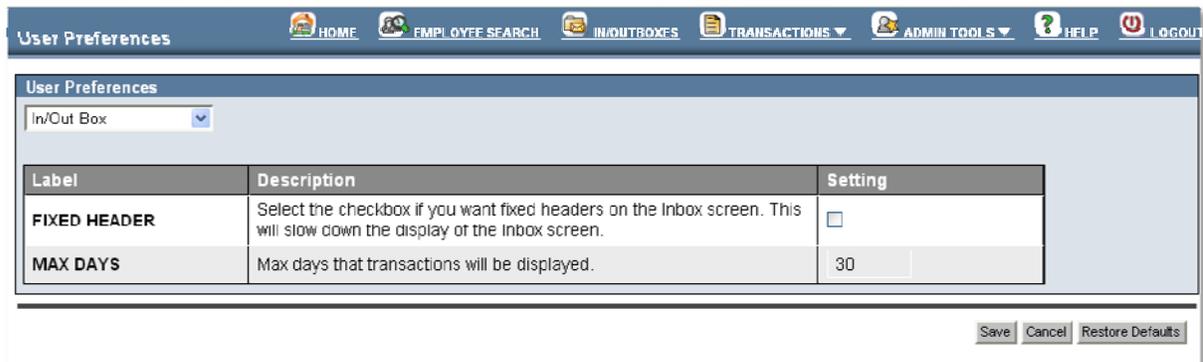
Figure 8: In/Outbox Preset Chooser

Setting User Preferences for In/Outboxes

User Preferences in the HR Front End allow users to customize certain settings. In this section, you will learn how to set the User Preferences for the In/Outbox screens. There are two user preference options related to In/Outboxes:

- In/Outboxes – Set the defaults for the In/Outboxes.
- In/Outbox Columns – Add or Remove columns for the In/Outbox tables.

Setting In/Outbox Default Settings

1. Select **Admin Tools** from the Menu Bar.

2. Click **User Preferences**

    User Preference screen is displayed

3. Select **In/Outbox**

    In/Outbox Preference Screen is displayed.

4. Select preference for each of the options:

    - Fixed Header – Keeps headers at top of column fixed when scrolling.
    - Max Days – Select the maximum number of days that completed transactions will stay in the In/Outboxes.

5. Click **Save**

Figure 9: In/Outbox Preferences

NOTE: Click the **Cancel** button to cancel the changes. Click the **Restore Defaults** button to restore to the system default settings

User Preferences – In/Outbox Columns

If the In/Outbox Columns option is selected, the screen will refresh and users will be able to choose which columns will be displayed in the In/Outboxes.

- The **Available Columns** contains columns that are not currently displayed.
- The **Selected Columns** contains columns that are currently being displayed.

In order to move items from **Available Columns** to **Selected Columns**:

1. Click the item(s) under **Available Columns** to be moved (to select more than one item, hold the CTRL key on the keyboard when selecting the items).

2. Click the arrow button to move the items

3. Once the items have been moved from **Available Columns** to **Selected Columns**, the up and down directional arrows can be used to order the items in Selected Columns accordingly.

4. Click **Save**.

NOTE: The Select, Tran ID, Stop ID, Route Stop, Tran Type, and UIN cannot be moved from the Selected Columns.

NOTE: Click the Cancel button to cancel the changes. Click the Restore Defaults button to restore to the system default settings
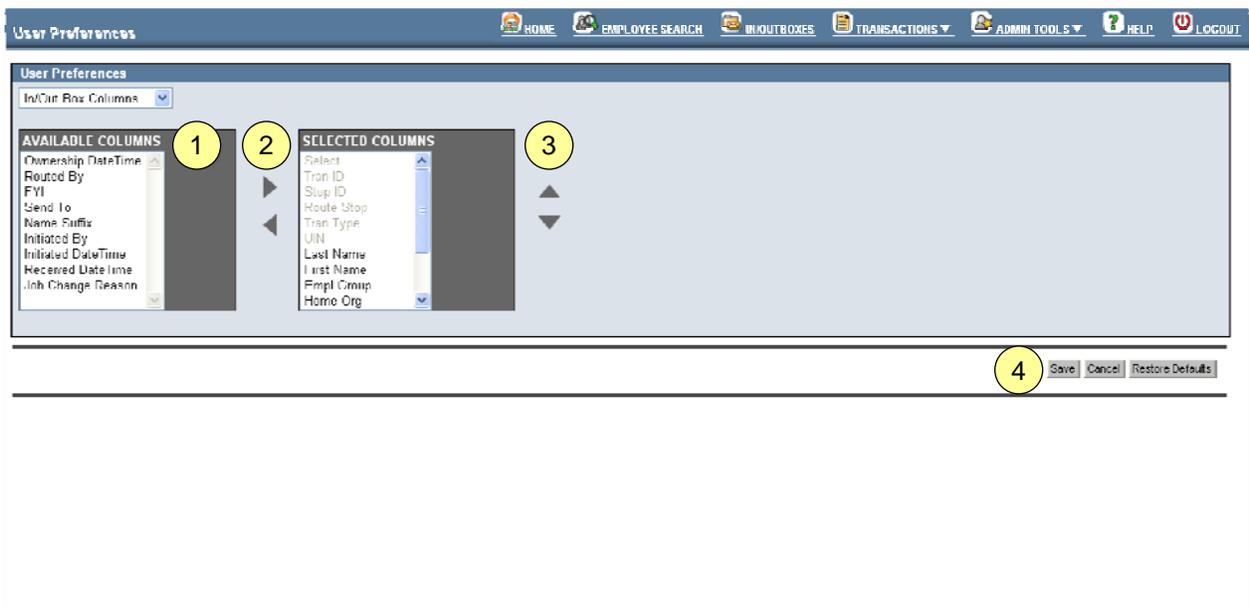

Figure 10: User Preferences – In/Outbox Columns

THIS PAGE INTENTIONALLY LEFT BLANK

HR Front End Training Team