

Assigning HRCenter Workflows/pages from Enterprise

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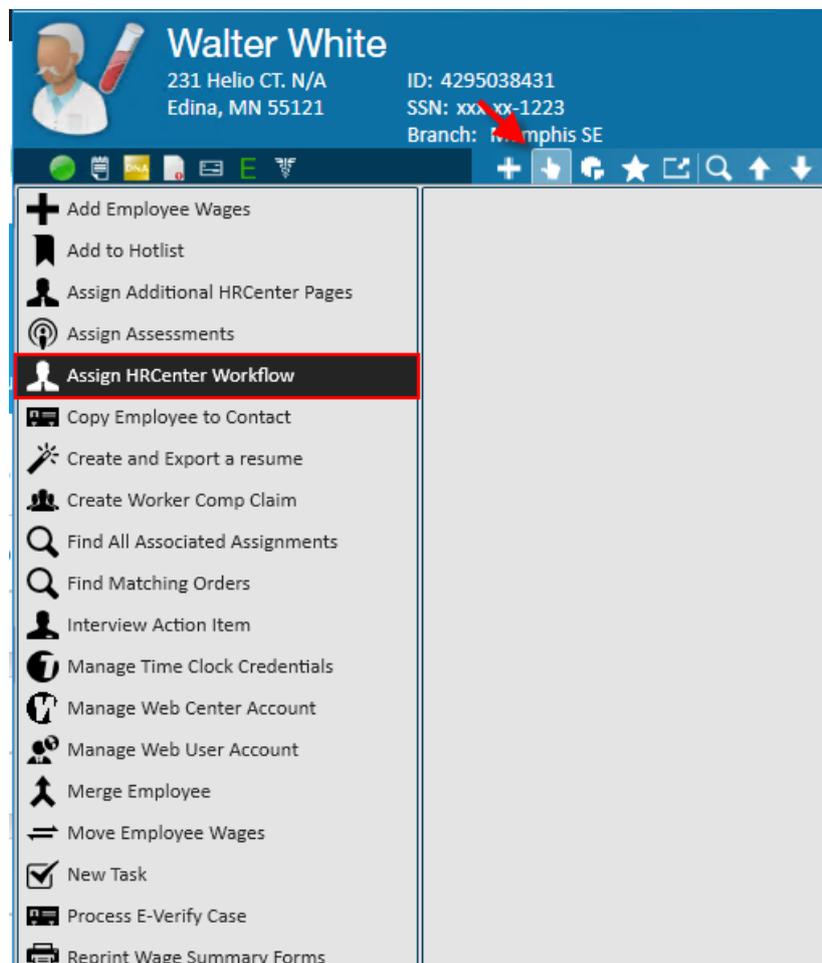
Assigning HRCenter™ Workflows

A workflow in HRCenter represents an application, or series of work items an employee must complete. There are two ways an employee might be given a workflow.

1. If the employee applied/registered online via HRCenter they typically assign themselves a workflow from those that are considered "public". In this process the employee will both create their own record as well as assign themselves a workflow and a web user account.
2. A service rep may assign workflows/and or pages directly to an existing employee record with a [web user account](#). In this way they may assign any workflow, "public or private" as well as individual pages.

In this article we will discuss how a service rep may directly assign these workflows and/ or pages.

After their web user accounts are created, employees can be assigned HRCenter workflows. To do this, navigate to the employees record, then to the actions menu and select 'Assign HRCenter Workflows':



You will be prompted with the 'setup workflow- assign' wizard. The username of the employee will automatically populate, select which workflow (required) and start at step (required) to start the user at. You may choose which language you would like this application to appear in from the language drop down. Click 'Next':

setup workflow - assign

workflow details
Assign a new workflow to this user.

Username: Walter.white

Workflow: Sasquatch Steel On and Offboarding

Start at Step: Step

Language: Step, SS Offboarding, SS Onboarding

Buttons: Cancel, Next >

Note The workflows and steps your team has created (or already assigned to this user) will populate the workflow drop down. If the desired step or workflow is not available it may be inactive.

On the next step of the wizard you will be able to assign additional pages to the step a la carte. Simply highlight a page and select the + icon for any page(s) you wish to assign to the employee. Once your selection is complete, click 'Finish':

setup workflow - add pages

Assign all the pages you'd like to include in the workflow for this user.

available + assigned

Chase_Direct Deposit

ChaseStaffing_Federal I9

Code of Safety Practices

Conflict Resolution Survey

Contact Information

Contingent Offer

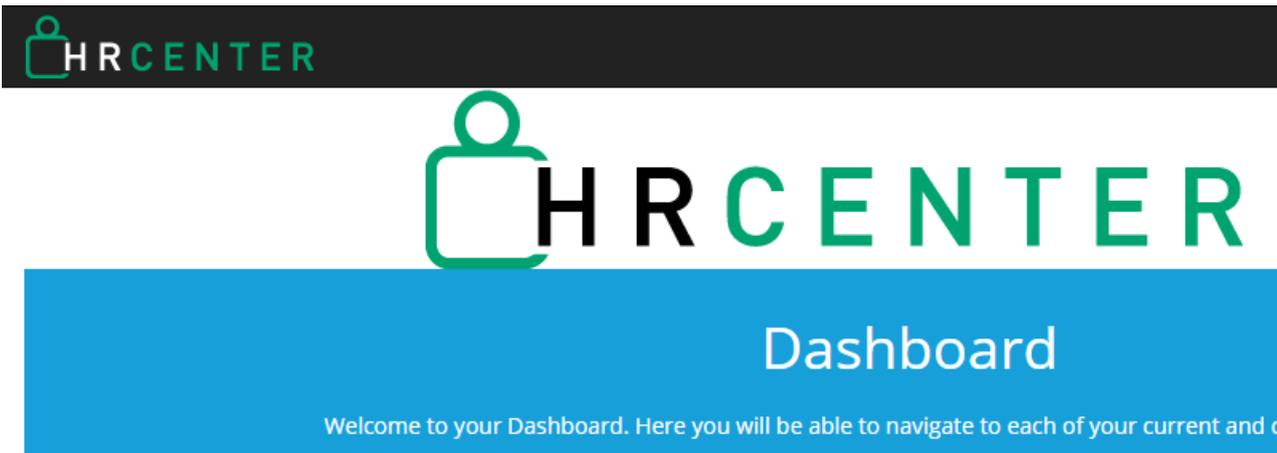
Occupational Safety & Health Video

Occupational Safety & Health Quiz

Sasquatch Steel Confidentiality Agree

Buttons: Cancel, < Back, Finish

When an employee logs on to HRCenter they will see all assigned workflows and steps available from their dashboard. They can begin a workflow, or step, by clicking its name:



Incomplete Workflows

Sasquatch Steel On and Offboarding	Continue
SS Onboarding Incomplete	Assigned just now
Basic Application	Continue
Safety Training Incomplete	Started 6 months ago

Assign Additional HRCenter Pages

Once the employee has gone through the application and onboarding process you have the ability to go back and add individual pages or groups of pages that you wish for them to fill out or update. Examples include a new form the customer requires the employee to fill out prior to assignment, W4's that need updating, safety quizzes, etc.

To begin navigate to the employee's record, then open the actions menu, select assign additional HRCenter pages:

Walter White
231 Helio CT. N/A
Edina, MN 55121
ID: 4295038431
SSN: xxx-xx-1223
Branch: Memphis SE

- + Add Employee Wages
- 🔖 Add to Hotlist
- 👤 Assign Additional HRCenter Pages**
- 📍 Assign Assessments
- 👤 Assign HRCenter Workflow
- 📄 Copy Employee to Contact
- ✂️ Create and Export a resume
- 👤 Create Worker Comp Claim
- 🔍 Find All Associated Assignments
- 🔍 Find Matching Orders
- 👤 Interview Action Item
- 🕒 Manage Time Clock Credentials
- 🌐 Manage Web Center Account
- 👤 Manage Web User Account
- 👤 Merge Employee
- 👤 Move Employee Wages
- ☑️ New Task
- 📄 Process E-Verify Case
- 🖨️ Reprint Wage Summary Forms

The username will automatically populate. When assigning individual pages, a workflow to add them to must be selected from a list of uncompleted workflows. If no incomplete workflows exist a new temporary workflow will be created by selecting "Additional Pages". Click 'next' to continue:

The screenshot shows a dialog box titled "choose workflow - assign". At the top, there is a blue header bar with a user icon, the title, and window control icons (help, close). Below the header, the text "workflow details" is followed by the instruction "Assign a new workflow to this user." There are three input fields: "Username" with the value "Walter.white", "Workflow" with a dropdown menu showing "Additional Pages", and "Language" with a dropdown menu showing "English". At the bottom right, there are two buttons: "Cancel" and "Next >". A red arrow points to the "Next >" button.

The 'Page Category' field may be used to filter what type (survey, form, informational, etc.) of page you wish to assign:

The screenshot shows a dialog box titled "choose workflow - add pages". At the top, there is a blue header bar with a user icon, the title, and window control icons (help, close). Below the header, the text "Assign all the pages you'd like to include in the workflow for this user." is followed by the label "Page Category". There is a dropdown menu with "Show All" selected. A red arrow points to the dropdown arrow. Below the dropdown, there is a list of page categories: "Page Category", "Show All", "Info Blocks", "Form Blocks", and "Survey Blocks". To the right of the list, there is a window titled "assigned" with a close button and the text "List is empty".

This will alter which pages appear under the available column. Select from the available column, highlight those in which you would like the employee to fill out:

choose workflow - add pages

Assign all the pages you'd like to include in the workflow for this user.

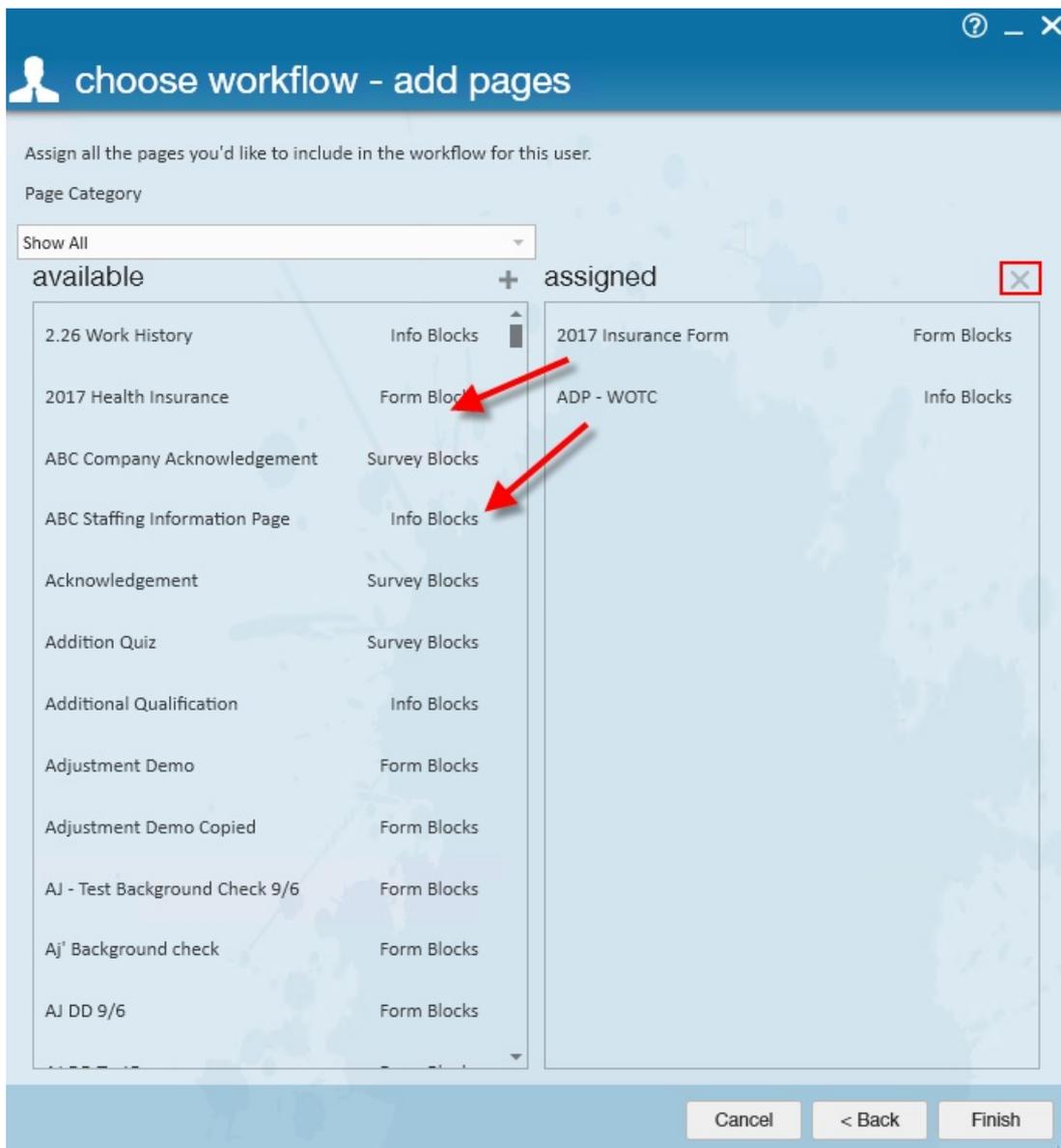
Page Category

Show All

available	+	assigned	X
2.26 Work History	Info Blocks	List is empty	
2017 Health Insurance	Form Blocks		
2017 Insurance Form	Form Blocks		
ABC Company Acknowledgement	Survey Blocks		
ABC Staffing Information Page	Info Blocks		
Acknowledgement	Survey Blocks		
Addition Quiz	Survey Blocks		
Additional Qualification	Info Blocks		
Adjustment Demo	Form Blocks		
Adjustment Demo Copied	Form Blocks		
ADP - WOTC	Info Blocks		
AJ - Test Background Check 9/6	Form Blocks		

Cancel < Back Finish

Click the '+' icon to assign to the employee. To remove those in the assigned column click on the 'X' icon:



Note Once additional pages have been assigned to the employee, they will appear in HRCenter one of two ways:

- If only one additional page was assigned, the name of the page will be displayed in HRCenter for the employee to complete.
- If more than one page is assigned, the "Additional Pages" will be displayed in HRCenter for the employee to complete.

Related Articles