Beyond - How to Assign a New HRCenter Workflow or Page

Last Modified on 01/26/2023 3:28 pm CST
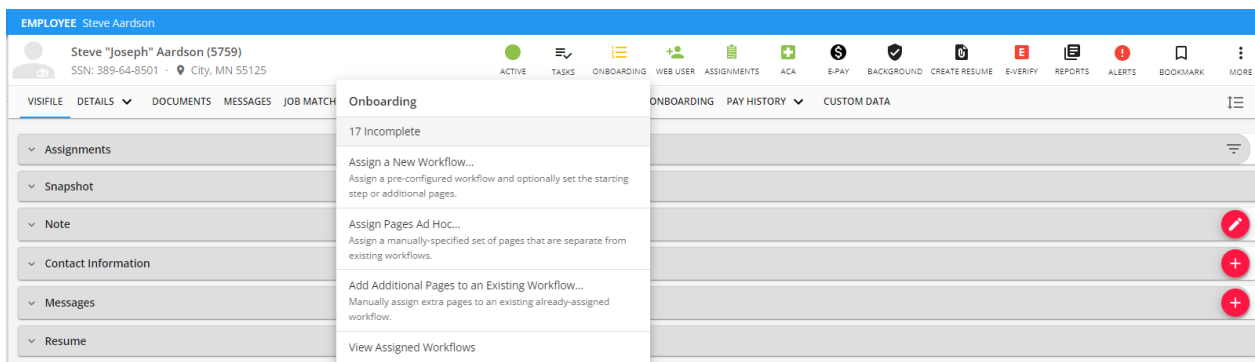
Assigning New Workflows or Pages

Current employees may need to fill out new workflows for specific customers or complete new I-9's and other documents. This will require your staffing specialists to assign new workflows or pages to them.

There are 3 Ways to Assign New Workflows or Pages:

1. Onboarding Charm
2. Onboarding Tab
3. Search Results (Assigning En Masse)

Utilizing the Onboarding Charm

The onboarding charm located in the upper right will reveal the current records history with relation to onboarding:

It also serves as a quick way to add a new workflow to the employee record as well as additional pages separate from a workflow or to an existing workflow.

Assigning Workflows or Pages from the Onboarding Tab

When you navigate to the employee's onboarding tab there will be an 'Assign' button in the upper right:

Steve "Joseph" Aardson (5759)
SSN: 389-64-8501 · City, MN 55125

ACTIVE · TASKS · ONBOARDING · WEB USER · ASSIGNMENTS · ACA · E-PAY · BACKGROUND · CREATE RESUME · E-VERIFY · REPORTS · ALERTS · BOOKMARK · MORE
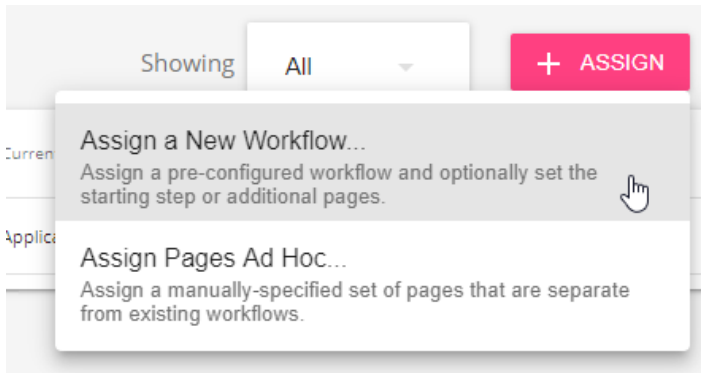
VISIFILE · DETAILS · DOCUMENTS · MESSAGES · JOB MATCHING · ASSIGNMENTS · STORY · REFERENCES · PAY SETUP · ONBOARDING · PAY HISTORY · CUSTOM DATA

Showing 17 of 17 Assigned Workflows   Showing All   + ASSIGN

Drag a column header here to group by that column

Workflow	Current Step	Current Step Stat...	Date Assigned ↓	Date Completed	Date Rejected
Additional Pages	Pages	Unstarted	11/5/2019		
Additional Pages	Pages	Unstarted	11/5/2019		
Additional Pages	Pages	Unstarted	11/5/2019		

This will allow you to assign an additional workflow or ad-hoc pages that need to be completed:

Showing All   + ASSIGN

Assign a New Workflow...
Assign a pre-configured workflow and optionally set the
starting step or additional pages.

Assign Pages Ad Hoc...
Assign a manually-specified set of pages that are separate
from existing workflows.

Once you select workflow or pages, you will be guided through a wizard to select your options. If you have notifications turned on in HRCenter, your employee will receive an email that there is a new workflow assigned to them.

You can also assign additional pages to a current application step by navigating to that step and selecting the add pages option on the pages card.

∧ **Required Signatures**

No signatures are required right now   Add

∧ **Pages**   ⊕

✓   2017 Health Insurance

✓   Texas I-9

From Search Results

You can assign a new workflow or page directly from a search result. This is a great option when you need to send out a new workflow or pages to multiple employees. You can assign from the employee or assignment searches.

1. Search for the employees you want to assign a new workflow or pages to
   - This can be from the employee or assignment search
   - Consider searching by interest code, current washed status, etc.

2. Select the box next to the employee(s) you want to assign the new workflow/page to

- You can select all shown by taping on the box at the top of the search results
- You can select all results by selecting the text next to the action box
- Only employees with a web user account will be assigned a new workflow/page

3. Select the Action button at the top and choose assign new workflow or pages

4. Select your workflow or pages

○ If you chose workflow, select the workflow, review the pages and complete the assignment:

Assign Onboarding Workflow

① Select a Workflow ─────────── ② Choose Pages ─────────── ③ Assign

Choose a workflow to assign for the 3 selected employees.

> You have selected multiple employees. Please select an HRCenter tenant to determine the available workflows to assign. Any selected employee who is not part of this tenant will fail to be assigned the workflow.

Tenant
twdemo ▾

Workflow
‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗‗ ▾
*Required

Start at Step
▾
....
*Required

Language
English ▾

CANCEL   NEXT >

○ If you chose pages, select your tenant (choose secondary actor if there are pages that require the recruiter to assign), select the page or pages, and complete the assignment

Assign Onboarding Pages Ad Hoc

✓ Select a tenant ─────────────── ② Choose Pages ─────────────── ③ Assign

Choose pages to assign to the 3 selected employees. These pages will be separate from any previously-assigned workflows.

Language
English ▾

Show all ▾	🔍 Filter by page name...

0 SELECTED PAGES

You must select at least one page to assign

⊘ 2017 Health Insurance	Form Blocks
⊘ 2017 Insurance Form	Form Blocks
⊘ AAA - Melissa Address Standardization	Info Blocks
⊘ ABC Company Acknowledgement	Survey Blocks
⊘ Acknowledgement	Survey Blocks
⊘ Addition Quiz	survey
⊘ Additional Qualifications	Info Blocks
⊘ Adjustment Demo	Form Blocks
⊘ Adjustment Demo Copied	Form Blocks
⊘ ADP WOTC	Info Blocks

CANCEL   < PREVIOUS   NEXT >

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