

# In/Outboxes HR FRONT END TRAINING HOW-TO GUIDE



## Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

## Copyright

Copyright © 2020 University of Illinois System – Office of Business Services. All rights reserved. No part of this publication may be reproduced or used in any form or by any means—graphic, electronic or mechanical, including photocopying, recording, taping or in information storage and retrieval systems—without written permission of University of Illinois System.

## Trademarks

Banner® is a trademark of Ellucian Company L.P. or its affiliates and is registered in the U.S and other countries.

## Course Information

Course ID: In/Outboxes  
Revision Date: October 10, 2020  
Version: 1.0

### **APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION**

*Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.*

#### **You are responsible for any activity that occurs using your logon**

- Do not share your passwords or store them in an unsecured manner.
- Do not leave your workstation unattended while logged on to administrative information systems.

#### **You have access to very sensitive personal information**

- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

**Any violation could subject you to disciplinary action.**

## HR Front End In/Outboxes Quick View

1

- Accessing Transactions from the In/Outboxes

2

- Using Presets and Filters

3

- In/Outbox User Preference

# TABLE OF CONTENTS

---

<b>Introduction</b> .....	<b>5</b>
Conventions Used in this Guide .....	5
<b>Accessing Transactions from the In/Outboxes</b> .....	<b>6</b>
My Inbox .....	6
Group Inbox .....	8
My Outbox .....	9
Group Outbox .....	10
Filter and Preset Chooser .....	11
Showing and Hiding the Filter and Preset Chooser .....	11
<b>Setting User Preferences for In/Outboxes</b> .....	<b>14</b>
Setting In/Outbox Default Settings .....	14
User Preferences – In/Outbox Columns .....	15

## ***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.



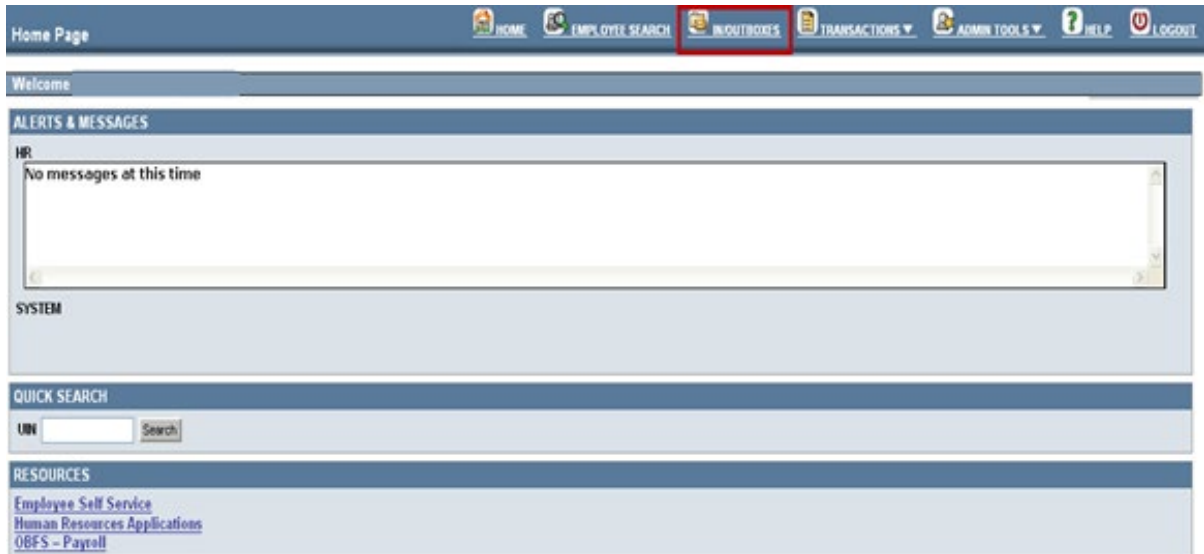
Indicates a **Hint** such as a tip, shortcut, or additional way to do something.



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)

Transactions for **James**

MY INBOX
  GROUP INBOXES
  MY OUTBOX
  GROUP OUTBOXES

Show Completed Transactions in Outbox for: 30 days. [Apply to List](#) [Set as Default](#)

PERSONAL PRESET IN USE: - None - [Show Filter and Preset Chooser<<](#)

CRITERIA FOR LISTED TRANSACTIONS:

Route Stop Role:	E-Group:	College:
Route Stop Level:	Campus:	Department:
Transaction Type:	COA:	Organization:

[Refresh List](#) [Select](#)

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input checked="" type="checkbox"/>	472	3797	System Send-To Stop: DEPT:Default:Review A U-1-KN-570-* (1472:3797)	SEPARATION		James		A	U-1-570001		No

**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 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)

The screenshot displays the 'In/Outboxes' application interface. At the top, a navigation bar contains links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below the navigation bar, the 'Transactions for' section is visible, featuring radio buttons for MY INBOX, GROUP INBOXES, MY OUTBOX, and GROUP OUTBOXES. The 'GROUP OUTBOXES' radio button is selected and circled in yellow with a '1'. Below the radio buttons, there is a text input field for 'Show Completed Transactions in Outbox for: 30 days.' with 'Apply to List' and 'Set as Default' buttons. The interface also includes a 'PERSONAL PRESET IN USE:' section with a dropdown menu set to '- None -' and a '>>Show Filter and Preset Chooser<<' button. To the right, the 'CRITERIA FOR LISTED TRANSACTIONS:' section contains several dropdown menus for Route Stop Role, E-Group, College, Route Stop Level, Campus, Department, Transaction Type, COA, and Organization. Below these sections, there are 'Refresh List' and 'Select' buttons, with the 'Select' button circled in yellow and labeled '3'. At the bottom, a table lists transactions with columns for Select, Tran ID, Stop ID, Route Stop, Tran Type, UIN, Last Name, First Name, Empl Group, Home Org, Owned By, and Completed. The first row is highlighted in yellow and circled in yellow with a '2'.

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input checked="" type="checkbox"/>	172	3797	System Send-To Stop: DEPT:Default:Review A U-1-KN-570-* (1472:3797)	SEPARATION		James		A	U-1-570001		No

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)

The screenshot shows the In/Outboxes interface. At the top, there is a navigation bar with icons for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, there are radio buttons for selecting between MY INBOX, GROUP INBOXES, MY OUTBOX, and GROUP OUTBOXES. The main content area is divided into two sections: 'PERSONAL PRESET IN USE' and 'CRITERIA FOR LISTED TRANSACTIONS'. The 'PERSONAL PRESET IN USE' section has a dropdown menu currently showing '- None -' and a button '>>Show Filter and Preset Chooser<<'. The 'CRITERIA FOR LISTED TRANSACTIONS' section contains a grid of criteria: Route Stop Role, E-Group, College, Route Stop Level, Campus, Department, Transaction Type, COA, and Organization. Below these sections are buttons for 'Refresh List', 'Take Ownership', 'Release Ownership', and 'Select'. A table displays transaction data with columns: Select, Tran ID, Stop ID, Route Stop, Tran Type, UIN, Last Name, First Name, Empl Group, Home Org, Owned By, and Completed. The table contains one row of data: a checkbox, 1472, 3797, System Send-To Stop: DEPT:Default:Review A U-1-KN-570-\* (1472:3797), SEPARATION, 00000000000000000000000000000000, Male, James, A, U-1-570001, FilledIn, Gms, No.

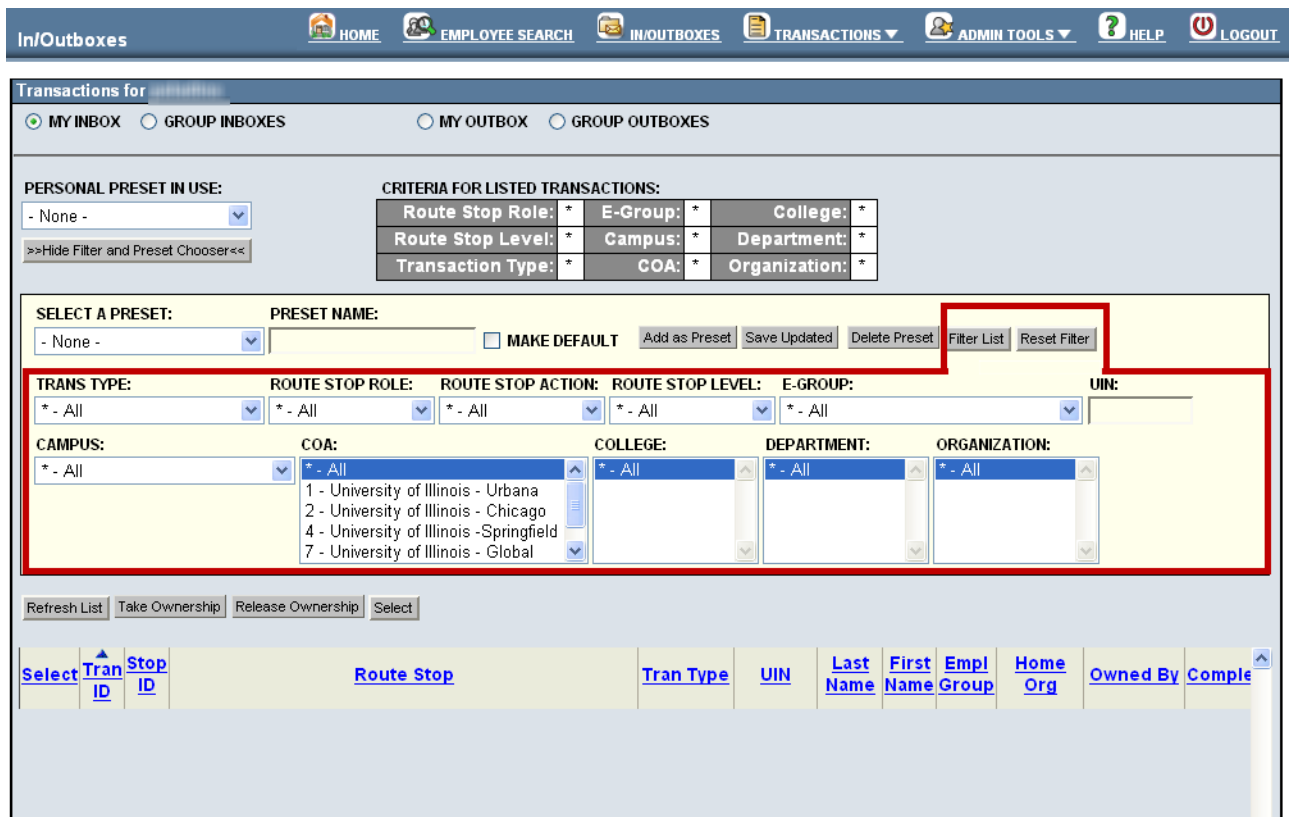
**Figure 6: In/Outbox Fields**

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**

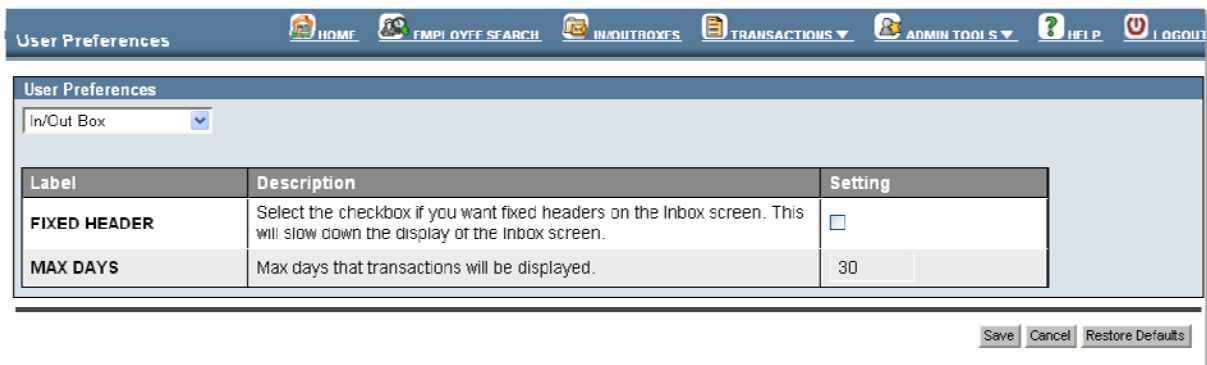
## **Setting User Preferences for In/Outboxes**

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**



Label	Description	Setting
<b>FIXED HEADER</b>	Select the checkbox if you want fixed headers on the Inbox screen. This will slow down the display of the Inbox screen.	<input type="checkbox"/>
<b>MAX DAYS</b>	Max days that transactions will be displayed.	30

**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:**

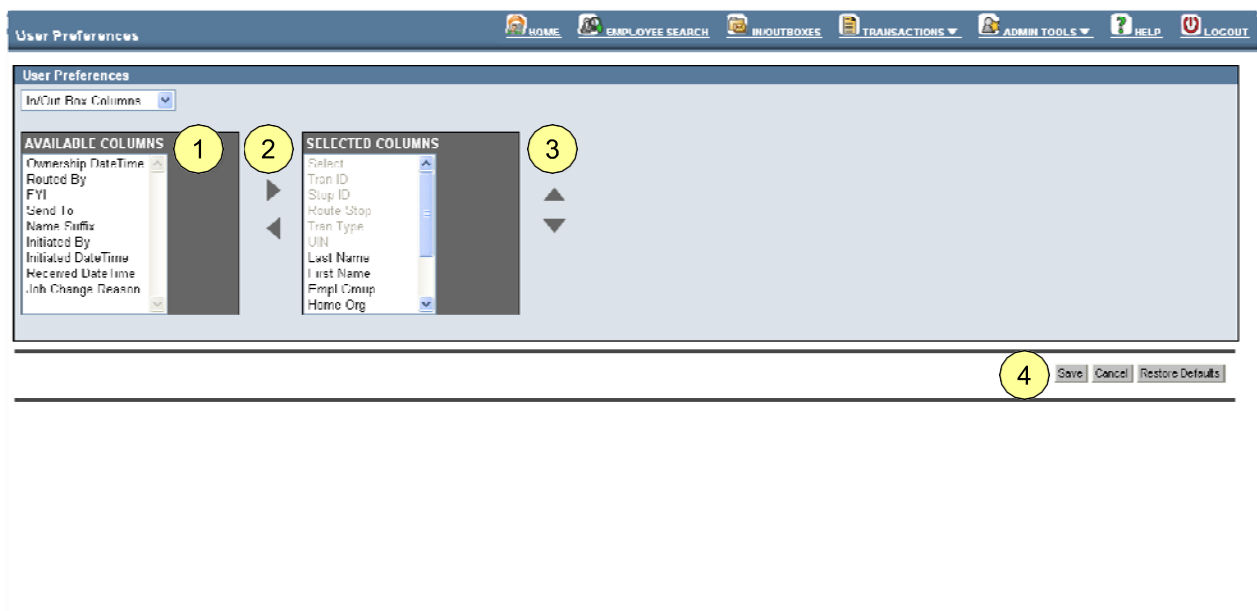
1. Click the item(s) under **Available Columns** to be moved (to select more than one item, hold the CTRL key on the keyboard when selecting the items).
2. Click the arrow button to move the items
3. Once the items have been moved from **Available Columns** to **Selected Columns**, the up and down directional 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