INFOPORTE

Routing Requests in Infoporte

Routing Requests

- Getting Started
- Establishing Groups
- Establishing Routes
- Submitting a request
- Dispositioning a request
- Questions
Getting Started

Make sure that you have access:

- Creating Routes and Groups
  - Inbox > Groups
  - Inbox > Routes
- Viewing and dispositioning requests
  - HR Requests
  - HR Views

Creating Groups

Groups allow you to send things to more than one user at a time
- For example: CAS - Dean’s Office HR = all dean’s office HR Staff

Groups can be edited after they are created
- Add or remove members
- Be specific when naming your group to make it easier to find

- Create groups prior to routes
Slide notes

To create a group, Select the Inbox icon. Under the groups tab, select new group.

REMINDER

★ If you already have groups established for departments to which you have access, you will see them listed on the Groups Tab.

★ You can modify existing groups if you have one that closely matches what you need for your route.
Slide notes

Name the new group.
Slide notes
Choose the department by selecting the name from the drop-down list or manually adding the name and then selecting it.

Slide notes
Click update.
Slide notes

Once the group is created, the banner will indicate that it is complete. Add names as needed. When creating groups you have the ability to select any active employee in the University who is in Infoporte.

Slide notes

When group members are added successfully, names appear in the "Members for" area. You will have the ability to add or delete members in the future.
Creating Routes

- Routes tell the request where to go
- Multiple stops are allowed on a route
- Create a draft route with groups prior to creating them in Infoporte
- Add yourself to Stop 1 as an approver to ensure that the submission is correct
- Remember that if one person at the stop approves the request, it will move to the next stop.

Request Routes

It is important to choose the correct request type. It will determine how and where the user can access the route.
For example, Faculty Review routes can only be accessed from the Faculty Request Icon.
Slide notes
To create a route, select the Inbox icon. Under the routes tab, select new route.

Slide notes
From the Create Route tab, enter the route name.
Slide notes

Enter the department number.
Select the category.
Slide notes
For stop 1, choose a person or group.

Slide notes
Selecting the FYI box will provide a notification to the recipient, but the recipient will not approve the submission. Select Receive email, if those on the stop are to receive an email notification.
Click to add the person or group to the route.

Add additional stops in the route, choosing FYI and/or receive email.
When adding individuals or groups to a route you should select one person to approve for each stop and should check the FYI box for everyone else. By selecting FYI, the action will stay in the Inbox for review, rather than disappearing, once it is approved at that particular stop.
Slide notes

If an approver on the route approves the request, it moves from that stop to the next.
When the route is successfully created, the message displays in the banner.

A New Request

Slide notes
Required fields have an asteriks. After submission, the Retract button will allow additional comments to be submitted.

**Tracking Requests**

- Easily view status updates
- Email notifications (optional)
- Confirmation of completed transactions

**The Inbox**

- The Inbox has filters like other Infoporte search screens
- The Inbox list can be exported
  - Originators can view comments/notes in the request by opening the request from the Inbox.
  
  **COMMENTS CANNOT BE DELETED.**
The HR Specialist Inbox

The Administrative Manager Inbox
This is a completed request

Questions?
Contact your Staff Development Specialist or your HR Specialist