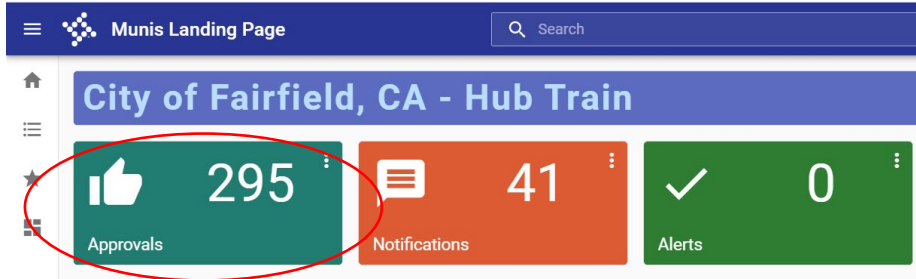


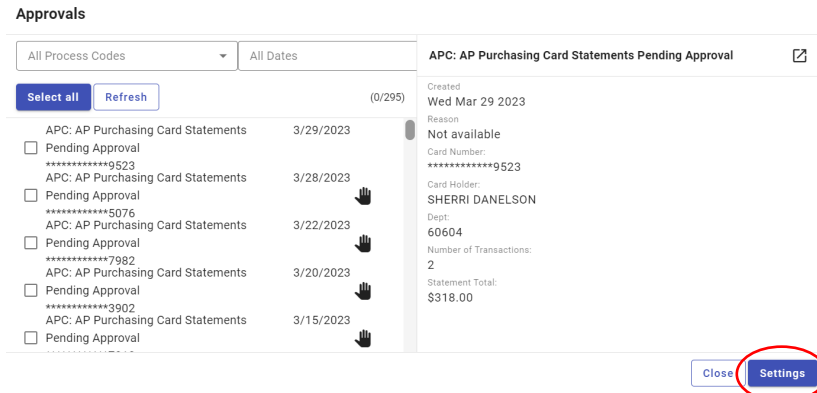
Tyler Topic: Workflow Forwarding

Note: If a user forgets to set their Workflow Forwarding when they are out of office, please contact Tylerhelp@fairfield.ca.gov and we can assist in setting this up.

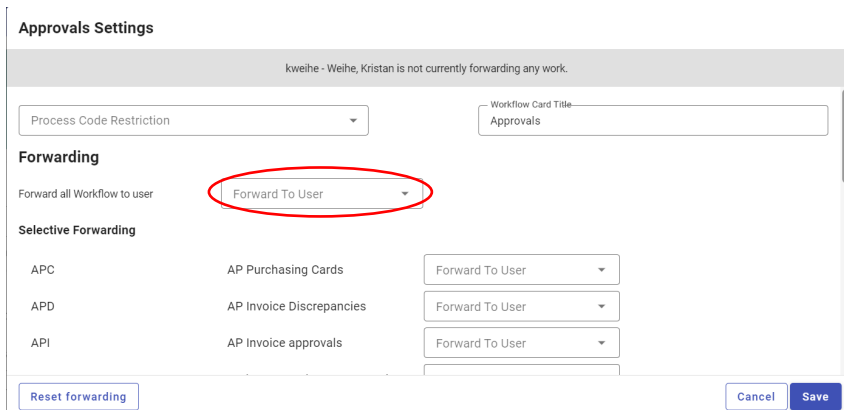
1) On the Munis Landing Page, click on the Approvals Tile.



2) Click on Settings in the lower right corner of the Approvals screen.



3) To Forward all Workflow to one user, choose an Approver from the dropdown options as shown below:



4) Or Selective Forwarding can be used to forward different processes to different approvers, or to not forward specific processes.

Approvals Settings

kweihe - Weihe, Kristan is not currently forwarding any work.

Process Code Restriction Workflow Card Title: Approvals

Forwarding

Forward all Workflow to user Forward To User

Selective Forwarding

APC	AP Purchasing Cards	Forward to user: Gangnay, Tenzin
APD	AP Invoice Discrepancies	Forward To User
API	AP Invoice approvals	Forward to user: Dixon, Myles
BGA	Budget Amendment Approvals	Forward to user: de Guzman, Julie
FAA	Capital Asset Adjustment	Forward To User

Reset forwarding Cancel Save

5) The Schedule Forwarding section at the bottom of the screen can be set to forward workflow for a specific timeframe with a start and end date.

Schedule Forwarding

Start Date: 04/04/2023 Hour: 12 Minute: 00 AM/PM: AM End Date: 04/05/2023 Hour: 11 Minute: 45 AM/PM: PM

Reset forwarding Cancel Save

If no timeframe is filled in, workflow forwarding will begin immediately and continue until it is manually reset. Click Save once the desired fields have been filled out.

6) If you choose to forward all workflow to one user and start immediately, the below message will appear and your Approvals tile will now be empty of items. If only Selective Forwarding or a date in the future is used to Schedule Forwarding, no message will appear.

Approvals

All Process Codes All Dates

Select all Refresh No Items to Display (0/0)

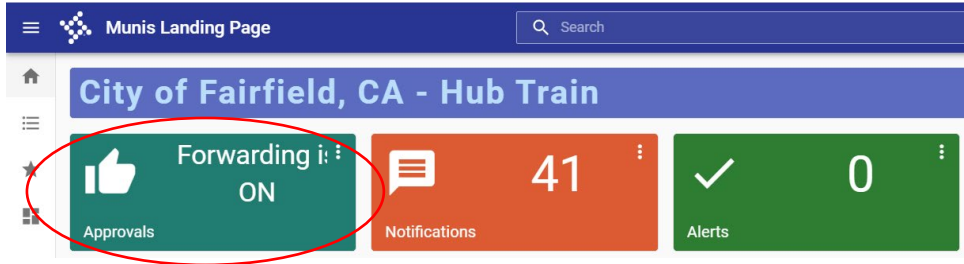
Workflow Message

[Workflow Message] The approver kweihe - Weihe, Kristan is currently forwarding work to approver (deguzman - de Guzman, Julie). You cannot receive pending actions while you are forwarding.

Ok

Close Settings

7) Click OK and then Close in the bottom right corner. The Approvals tile will now indicate Forwarding is ON if you chose to forward all workflow starting immediately.



8) The person who is receiving the Workflow Forwarding will get the below message that they are receiving forwarded work when they open their Approvals tile.

Approvals

You are currently receiving forwarded work from (kweihe - (kweihe - Weihe, Kristan)).

All Process Codes: All Dates **APC: AP Purchasing Card Statements Pending Approval**

Select all Refresh (0/302) Created: Wed Mar 29 2023

Process Code	Card Number	Date	Hand Icon
APC: AP Purchasing Card Statements Pending	*****9523	3/29/2023	
APC: AP Purchasing Card Statements Pending	*****5076	3/28/2023	Hand
APC: AP Purchasing Card Statements Pending	*****7982	3/22/2023	
APC: AP Purchasing Card Statements Pending	*****3902	3/20/2023	Hand
APC: AP Purchasing Card Statements Pending	*****7312	3/15/2023	Hand
APC: AP Purchasing Card Statements Pending	*****7312	3/14/2023	Hand

Reason: Not available
 Card Number: *****9523
 Card Holder: SHERRI DANELSON
 Dept: 60604
 Number of Transactions: 2
 Statement Total: \$318.00

9) To turn off Workflow Forwarding (if not scheduled to end at a certain date), repeat steps 1 & 2, click "Reset Forwarding," then click "Save."

Approvals Settings

kweihe - Weihe, Kristan is currently forwarding work to primary approver jddezuzman - de Guzman, Julie.

Process Code Restriction: Workflow Card Title: Approvals

Forwarding
 Forward all Workflow to user: Forward To User: de Guzman, Julie

Selective Forwarding

Process Code	Card Title	Forward To User
APC	AP Purchasing Cards	Forward To User
APD	AP Invoice Discrepancies	Forward To User
API	AP Invoice approvals	Forward To User
BGA	Budget Amendment Approvals	Forward To User
FAA	Capital Asset Adjustment	Forward To User

Reset forwarding Cancel **Save**