EmployeeConnect
Work. Flow. Smarter.

Workflow Toolkit

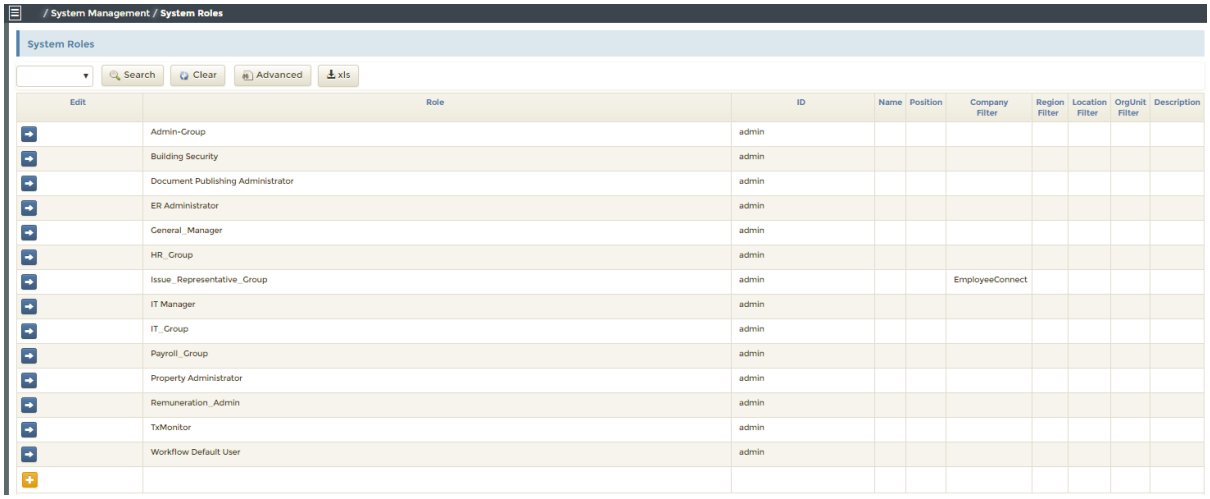
A manual designed to help individuals use the Workflow Toolkit

Workflow

Workflow is the name given to the chain of actions an object follows as it moves through the system. Workflow processes are intended to be somewhat correlated to the current business processes. Basically, Workflow enables paper-based processes to be translated online. For each object, there can be a different *Workflow Process*, and the locations or people to which an object moves must be specified as *Workflow Roles*.

System Roles

To set up workflow processes, workflow roles must be determined and put into the system. From the System Management, Groups and Roles link you can create a new workflow role.



Edit	Role	ID	Name	Position	Company Filter	Region Filter	Location Filter	OrgUnit Filter	Description
	Admin-Group	admin							
	Building Security	admin							
	Document Publishing Administrator	admin							
	ER Administrator	admin							
	General_Manager	admin							
	HR_Group	admin							
	Issue_Representative_Group	admin			EmployeeConnect				
	IT Manager	admin							
	IT_Group	admin							
	Payroll_Group	admin							
	Property Administrator	admin							
	Remuneration_Admin	admin							
	TxMonitor	admin							
	Workflow Default User	admin							

Role

To create a new role, click on the icon. Select the Role from the available picklist and then select the applicable employee for that role. You can create as many roles as needed for the organisation and apply filters if required.

Filters

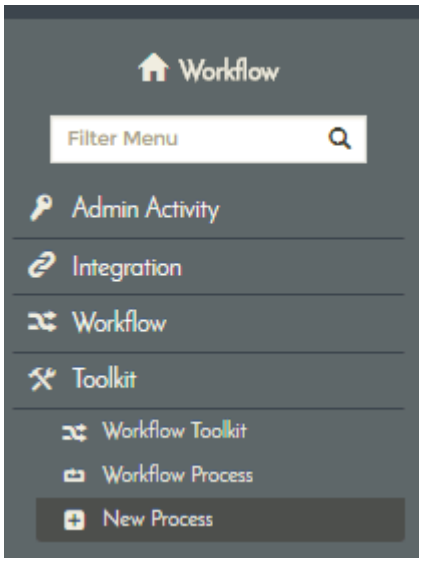
If the organisation has 4 payroll officers in 4 different locations, you can use the Location filter to assign all the payroll officers to the Payroll_Group and then assign their various locations. The system will recognize the location filter when workflow is generated to

ensure workflow is directed to the correct payroll officer based on the submitting employee's location..

Description

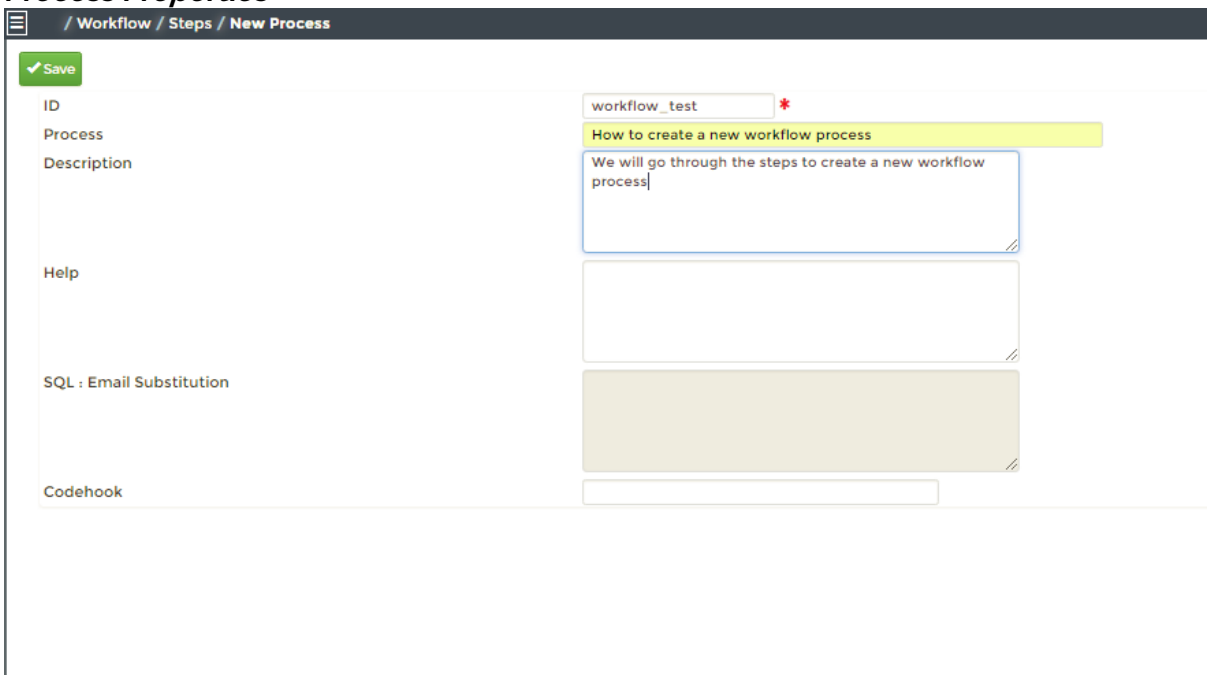
You can use this memo box to write a brief description of what the role is for. This is helpful to future administrators to understand, at a glance, what was to be achieved.

Workflow Processes



To create a new Workflow Process, select New Process on the Advanced>Workflow>Toolkit Menu.

Process Properties



The above example of a test process shows the various properties associated with a workflow process.

ID
A unique identifier for this workflow process.

Process
Enter what the process is to be called. Ensure that the name accurately describes the process being created.

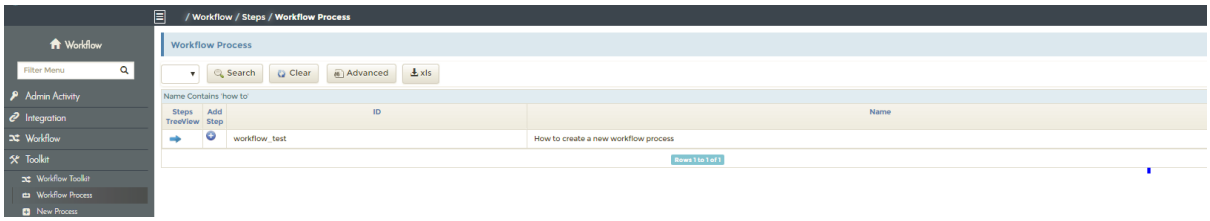
Description
You can use this memo box to write a brief description of what the process does. This is helpful to future administrators to understand, at a glance, what was to be achieved.

SQL: Email Substitution.
This area is used to create code needed to replace data fields as needed in the email message over and above standard substitution functions.

Codehook
This field is used to reference a selection of stored procedures defined by EmployeeConnect to trigger separate additional events from this workflow process. Please confer with your EmployeeConnect consultant for available options.

Workflow Process Steps

To create the steps that comprise the workflow process, select the newly named process from the Workflow Process list

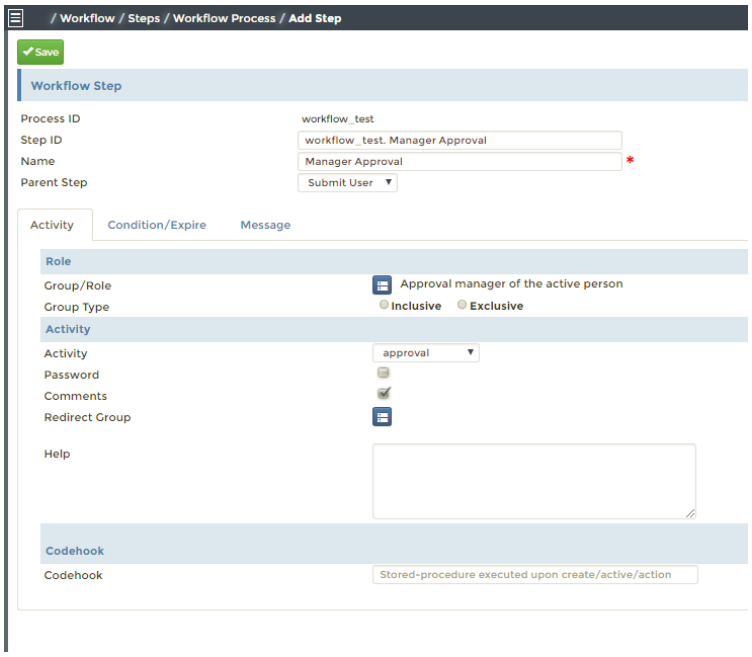


The first step in each workflow process is automatically set as Submit. This is recorded as Step 0. Each step after that is up to the administrator to create and update. Click on the Add Step icon to begin building the workflow process.

Step ID
Enter what the step is to be called. Ensure that the name accurately describes the step being created and is easily understood by all users. The usual convention is to use the workflow process id and add '.' and the role name. *ie workflow_test.manager_approval*

Parent Step
From the listbox, choose what step the current step is to follow. This is how the system defines the sequence of the process.

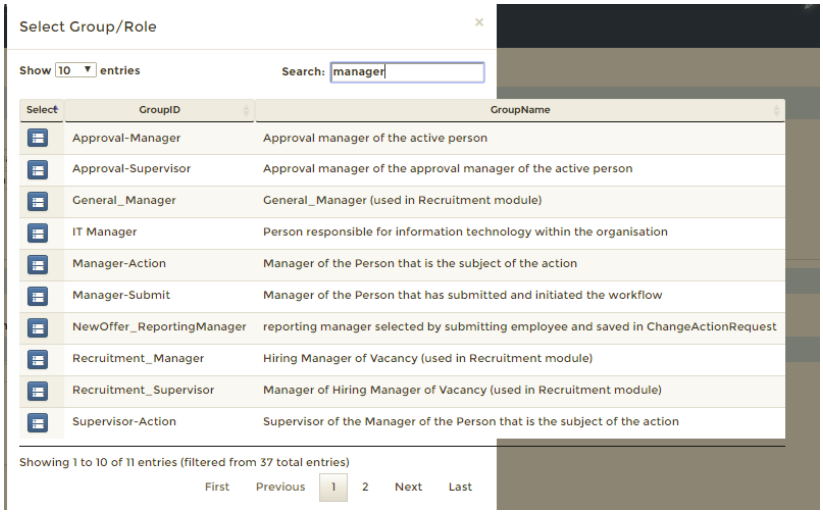
Activity Tab



Group/Role

Define which Workflow Role is to act on this step. Select the appropriate role from the listbox. List values are created when Workflow Roles are set up. Only one role can be chosen to act in any given step, however, many steps can occur at the same time.

There are a number of types of Manager Roles. Correct selection of the manager type will ensure the correct results.

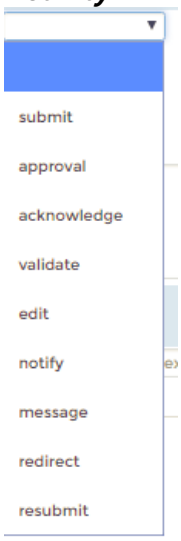


In our example, we have chosen Approval- Manager role – being the approval manager of the person that submitted the form.

Group Type

If there are multiple people assigned to the selected role, you can determine whether everyone in the group has to complete the required action (inclusive) or any one of the group can complete the action (exclusive).

Activity



Define the type of action that is to be performed at this step of the process.

- ***Approval***

The action role has the choice of approving or rejecting the submission.

- ***Acknowledge***

The action role is required to select a checkbox to indicate that they have acknowledged this submission.

- ***Validate***

The validate activity combines the Approval activity with the Edit activity allowing the action role to approve or reject and edit the submission.

- ***Edit***

The action role can insert and change data on the submission. This is useful for processes such as performance reviews on which several people may be providing data.

- ***Notify***

Informs the action role of the occurrence of this submission. The action role selects a checkbox to indicate that this activity should be removed from their Workflow View. The notify activity is only different from acknowledge in that it doesn't wait for action to continue through the remainder of the workflow process.

- ***Message***

Notifies the action role of the process via email, but does not require any action from the action role. This is equivalent to a message headed "For Your Information."

- ***Redirect***

The action role is able to edit and re-direct the workflow to a selected peer from the available list. This is useful for a process that might need to be approved by a previous manager or a new manager.

- ***Resubmit***

The action role is able to edit and then resubmit into workflow so that the entire process begins again from the start. This is useful for processes such as performance reviews where there may be many edits before all parties agree.

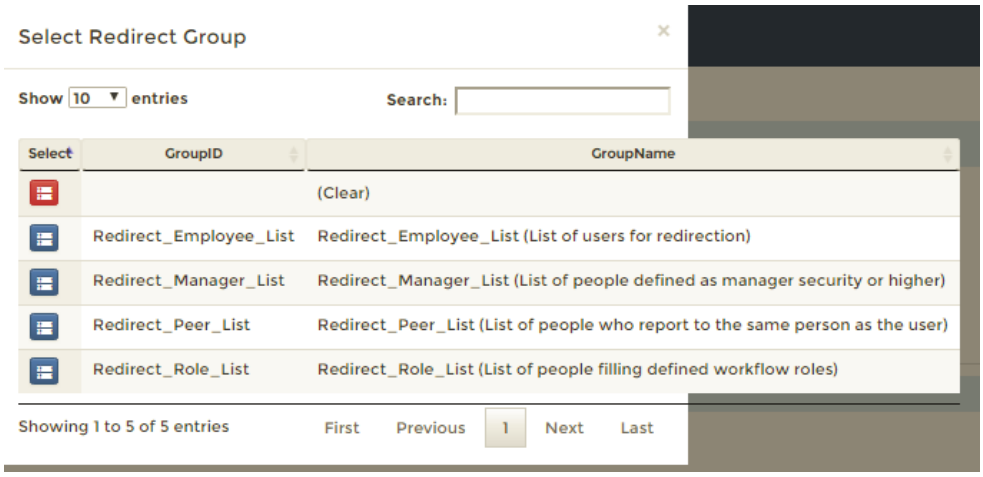
Password

If selected, an electronic signature (password) must be entered on the action as part of the activity. This adds security to the workflow process and can be a part of any of the activities available.

Comments

If selected, the action role may include comments that will be viewed on the Form by any employee included in the workflow process.

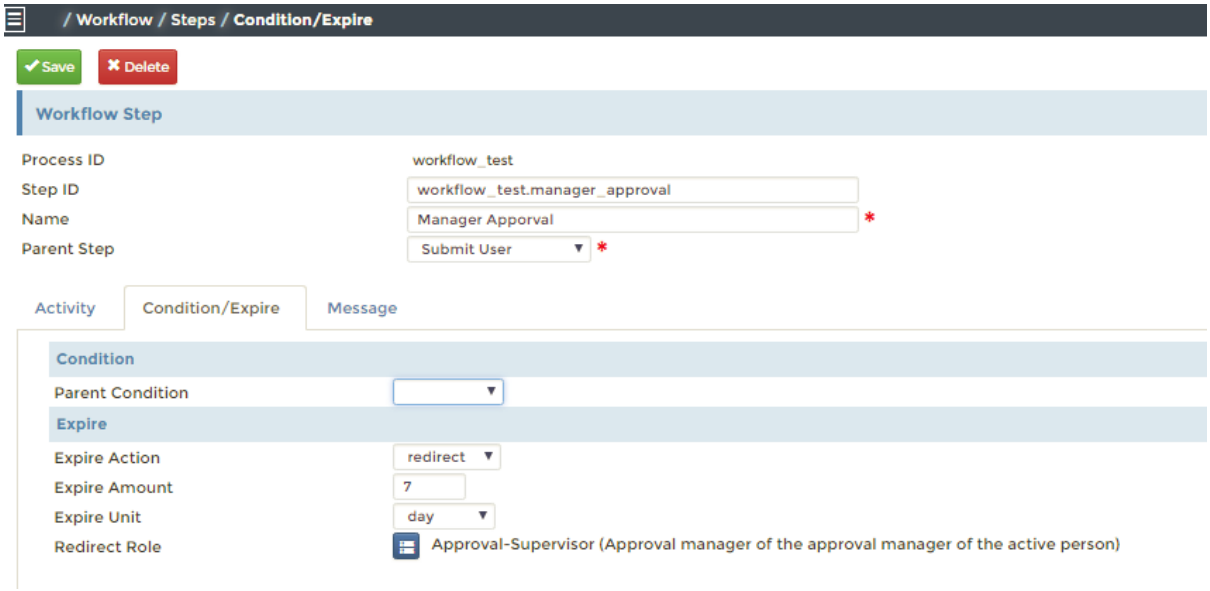
Re-direct Group
If the step allows a re-direct, select the appropriate re-direct group to select from.



Help
The administrator can enter in instructions for the step or activity here. The text entered will appear in the activity box when the workflow step is acted upon. Unlike other help tags for other parts of the system, this help will appear automatically.

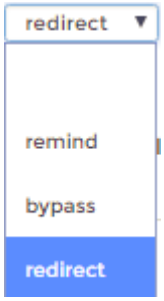
Codehook
This field is used to reference a selection of stored procedures defined by EmployeeConnect to trigger separate additional events from this workflow step. Please refer to your EmployeeConnect consultant for available options

Condition Expire Tab



Expire Action

This is used when a business rule is set to Expire. Select from the available expiry actions.



Expire Amount

Enter the numeric value to be applied

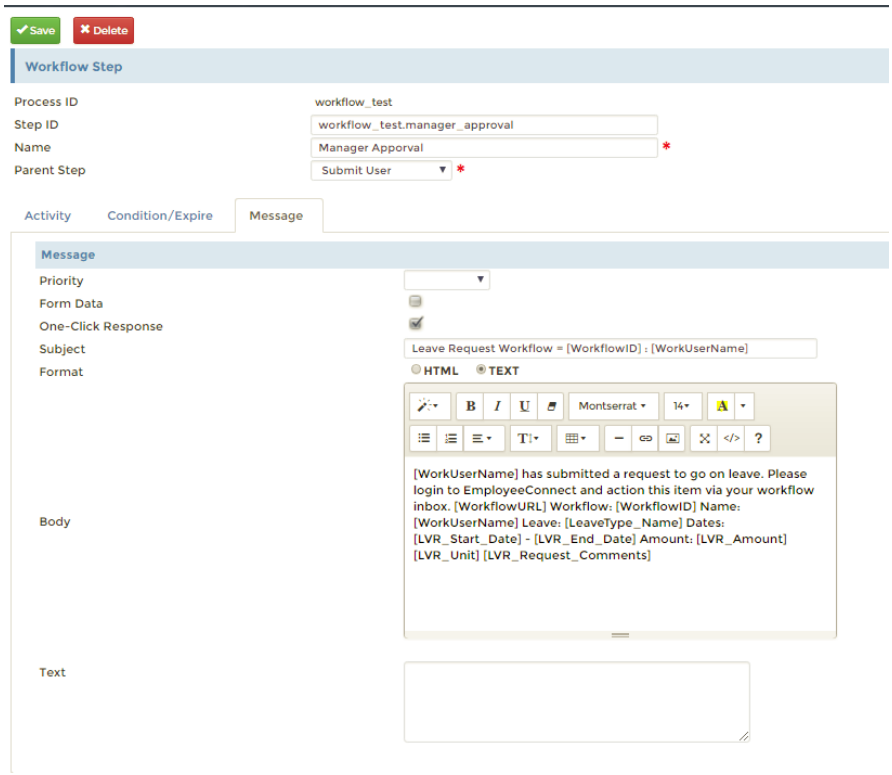
Expire Unit

Select the required unit.

Redirect Role

Select the appropriate redirect role

Message Tab



Priority
Select from the options if you want the message to have a priority flag

Form data
The object submitted will be included in the body of the email as HTML so that it will appear in the email exactly as it would appear in the browser window.

One-Click Response
The email gives a link straight to the workflow activity to be performed. There is no need for the user to log into EmployeeConnect to complete the action. However, it allows Approve or Reject only, there is no ability to add comments if using this option.

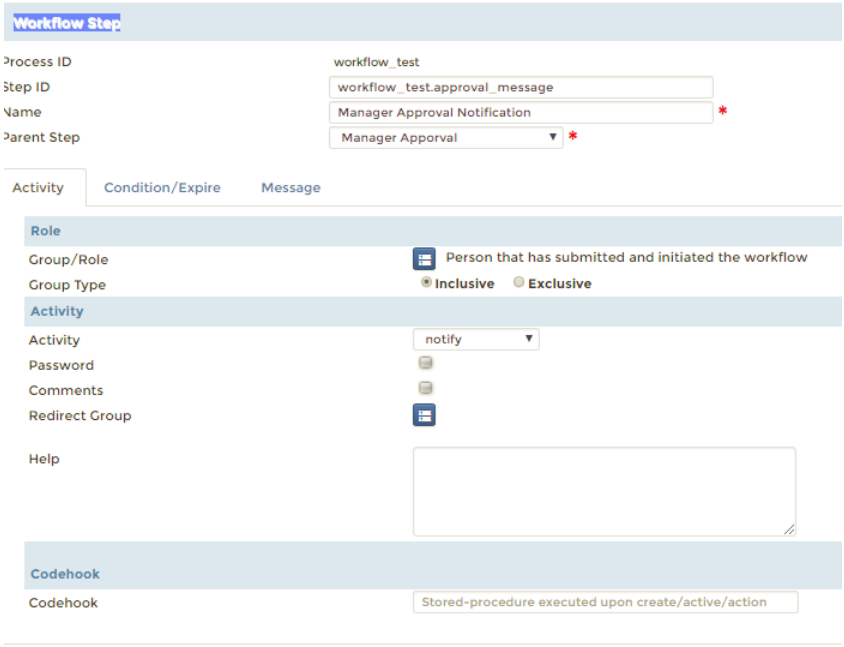
Subject
Enter the text that will appear in the recipient's email subject box when the workflow process generates the email. Every time this step occurs, the same subject will appear.

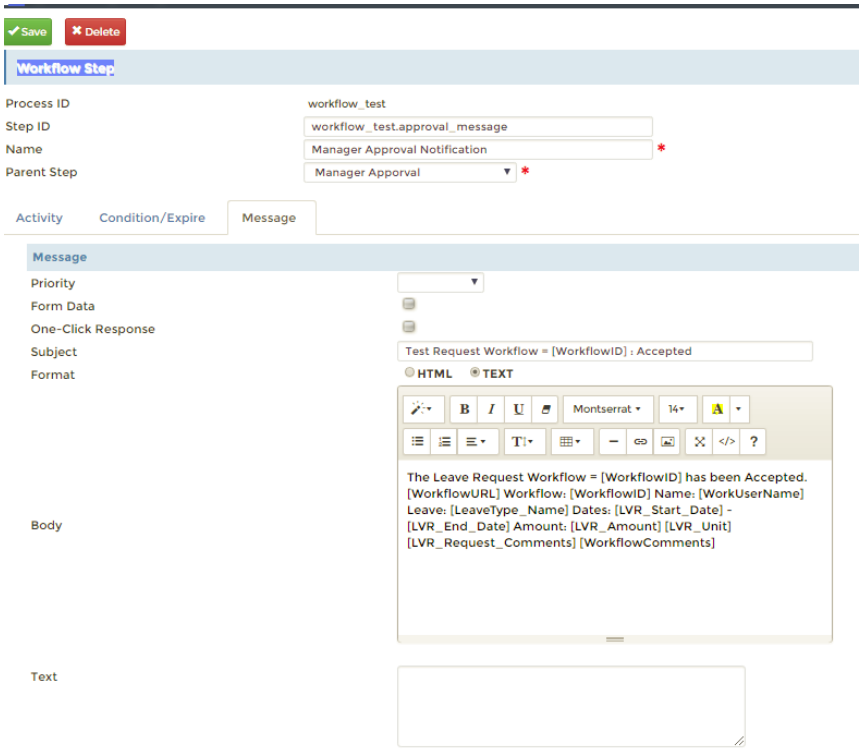
Body
Enter the text that is to be included in the body of the email message. Be aware that data fields surrounded by [] are substituted values.

Sending an email is not a compulsory part of the step. If no email is required, leave the Tab blank.

You can continue to add as many steps as are required to complete your defined process. The following steps show the message sent to the employee when the manager approves the leave request as well as the message sent when the manager rejects the request.

Approval:





Reject:

Save Delete

Workflow Step

Process ID workflow_test
Step ID workflow_test.manager_reject
Name Manager Rejection Notification *
Parent Step Manager Apporval *

Activity Condition/Expire Message

Role
Group/Role Person that has submitted and initiated the workflow
Group Type Inclusive Exclusive

Activity
Activity notify
Password
Comments
Redirect Group
Help

Codehook
Codehook Stored-procedure executed upon create/active/action

Save Delete

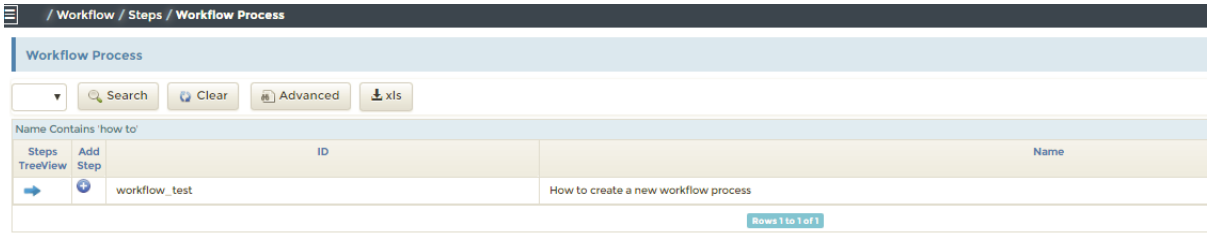
Workflow Step

Process ID workflow_test
Step ID workflow_test.manager_reject
Name Manager Rejection Notification *
Parent Step Manager Apporval *

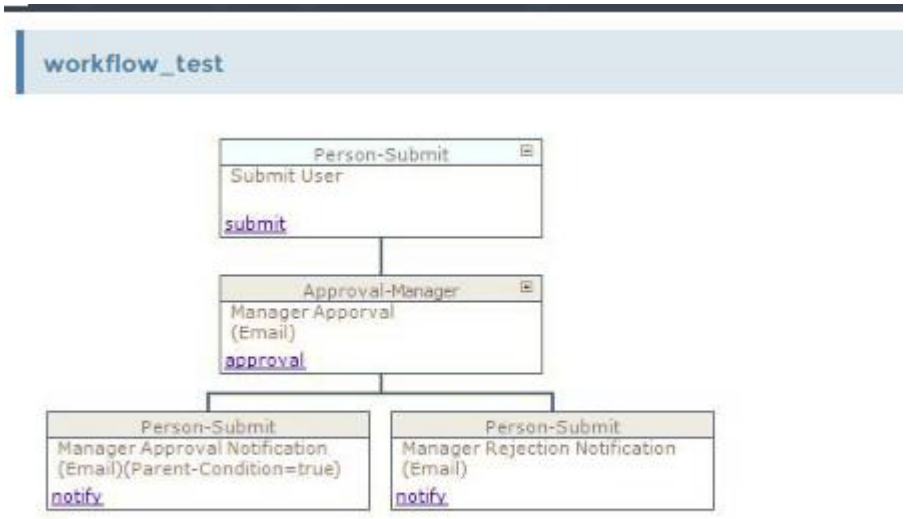
Activity Condition/Expire Message

Message
Priority
Form Data
One-Click Response
Subject Test Request Workflow = [WorkflowID] : Rejected
Format HTML TEXT
Body The Leave Request Workflow = [WorkflowID] for [WorkUserName] has been Rejected by the Manager. Workflow: [WorkflowID] Name: [WorkUserName] Leave: [LeaveType_Name] Dates: [LVR_Start_Date] - [LVR_End_Date] Amount: [LVR_Amount] [LVR_Unit] [LVR_Request_Comments] [WorkflowComments]
Text

When the process has been defined, it can be viewed in the tree format for a visual representation of the steps and their dependencies.



Click on the Steps TreeView



Hints:

- It is best to define your process on paper as a flowchart prior to starting the actual definition in EC
- Ensure you understand the roles involved in the workflow process

Appendix A

Icon	Activity	Function
	Submit	Within Workflow Supervisor, this appears as the submit step. Within Workflow outbox, it appears as a form that is still waiting for the workflow to finish.
	Approval	The user either clicks approve or reject and clicks submit
	Acknowledge	This activity is similar to Notify, however, the process does wait for this action to occur before it continues
	Validate	This activity combines the approval function with the edit function. The user can edit the form as well as Approve or Reject the form. Within the workflow supervisor, this icon also refers to any activity done by EmployeeConnect (eg Continue, TxMonitor
	Edit	The user can change entries that are updateable on the form before clicking submit. The user must also click a checkbox
	Notify	The user is required to complete a checkbox and click submit. The remainder of the process does not wait for this action to occur, however
	Message	An email is sent to the user and no further action is required. (This icon should only be viewable in Workflow Supervisor)
	Redirect	This activity allows the user to choose who the form will go to instead of the current user.
	Resubmit	The user can change entries in the form and submit back to the process from the beginning. (Resets all steps to Pending)