HRwize

Workflow Guide

Bringing three basic processes to life

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1. Continuous Workflows: Employee Birthday

Create a simple notification for a manager five days before an employee’s birthday, reminding them to purchase a cake and card.

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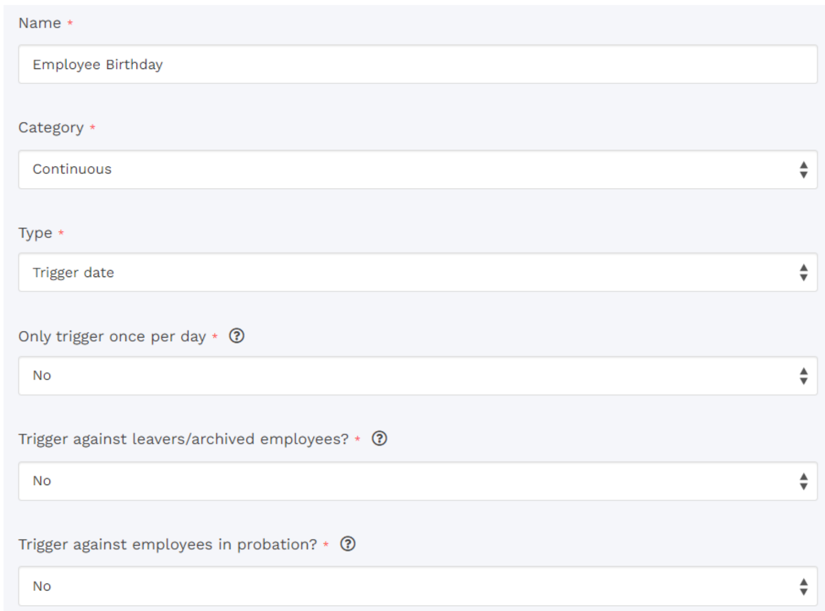
Introduction:

Throughout this document, we'll be building three simple workflows across the continuous, approval and task workflow types – we encourage you to follow this process in your HRWize environment, ensuring that you've set the workflow to "Active – No" within your workflow settings.

Setting up the skeleton:

Initially, we'll need to set up the workflow skeleton by selecting the 'Add' button at the bottom of the workflow screen in Administration > HR > Workflows > Workflows.

Once you reach the workflow screen, begin by applying the following options:



What do these settings mean?

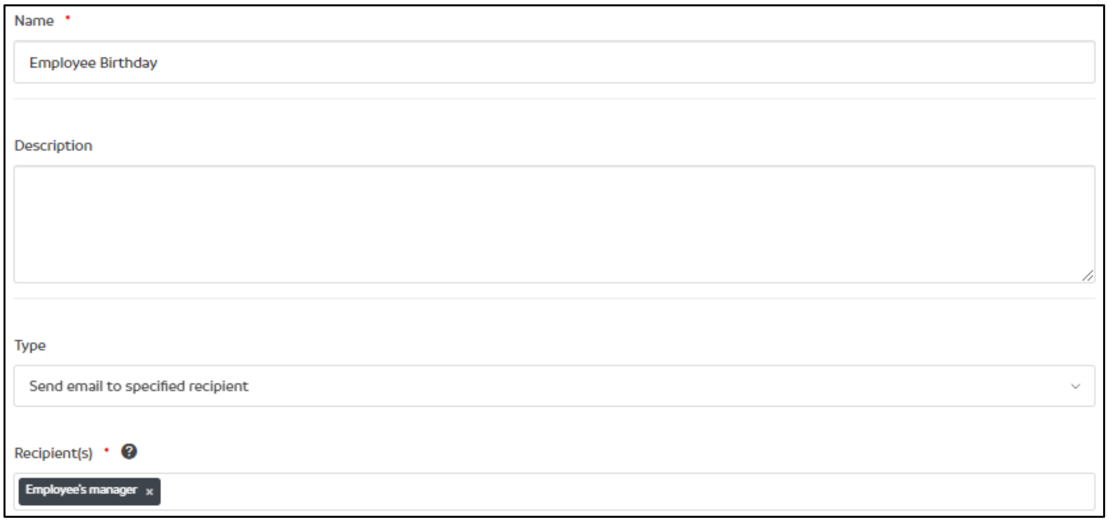
- The workflow is set to continuous, which means it will trigger as an overnight batch process looking for a certain condition.
- The condition is set to the triggering date, which means that it is seeking the trigger condition of the first workflow step.
- The workflow is not triggered against leavers, meaning that it will only trigger your current or active employees.
- The workflow triggers to probation employees, which means it will trigger for employees as well who are under probation before turning to an official employee.

Once these rules have been set, choose any relevant permissions using the tick boxes, which will appear below these options. It's important to remember to set the "Workflow Active" option to 'No' to prevent the workflow from being triggered against your employee records.

Once this has been set, click on the 'Submit' button to go into the step builder – once in the step builder, you can use the 'Add step' button at the bottom left to start building your first step.

Defining the steps:

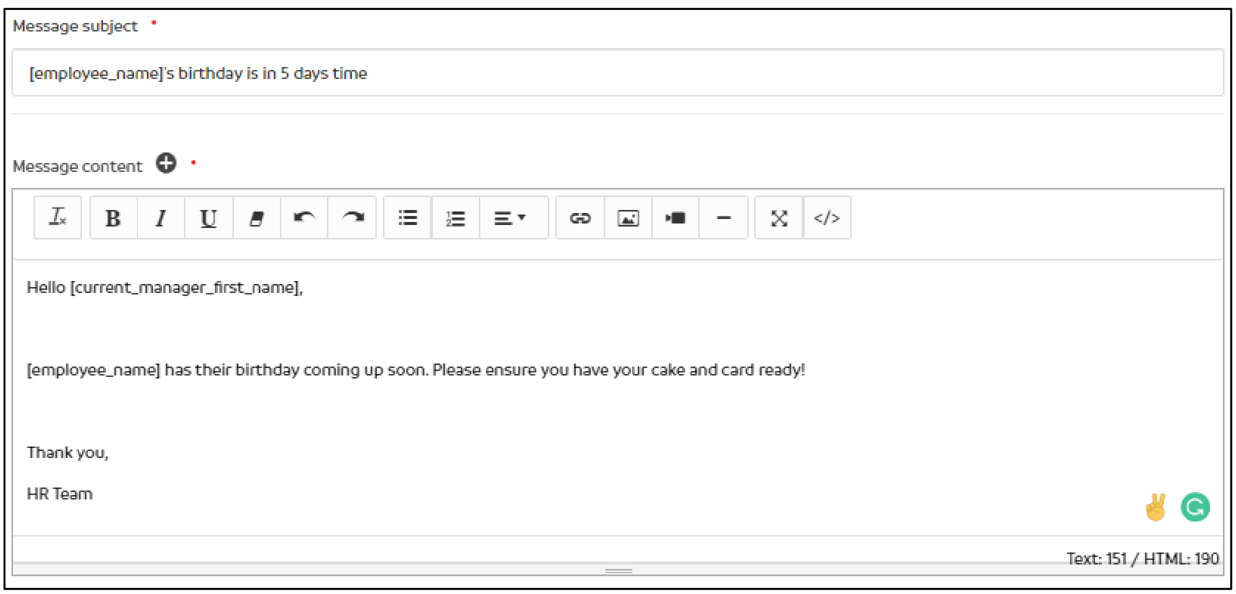
The only step you will have to add in this workflow is the “Send Email to Specified Recipient”, where you input, as the recipient, the employee’s manager to remind the employee’s manager about their employee’s upcoming birthday.



What do these settings mean?

- The workflow step will generate an email notification that will be sent to the employee’s manager.

To personalize the email content, simply edit the message subject and the message content provided in the example below:

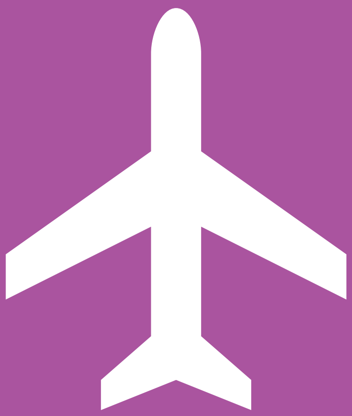


Any text surrounded by brackets is known as a ‘system tag’. These tags will populate information into the email from the employee record. The tick boxes can be left blank as the email does not need to send as a plain text nor does it contain any sensitive data.

At this workflow is based around a triggered date defined in the workflow skeleton, we can now set up the trigger rule using the "When Should This Happen?" statement as below:

2. Approval Workflow:
Holiday Approvals

Simplifying your time off process via our two-step approval workflow.



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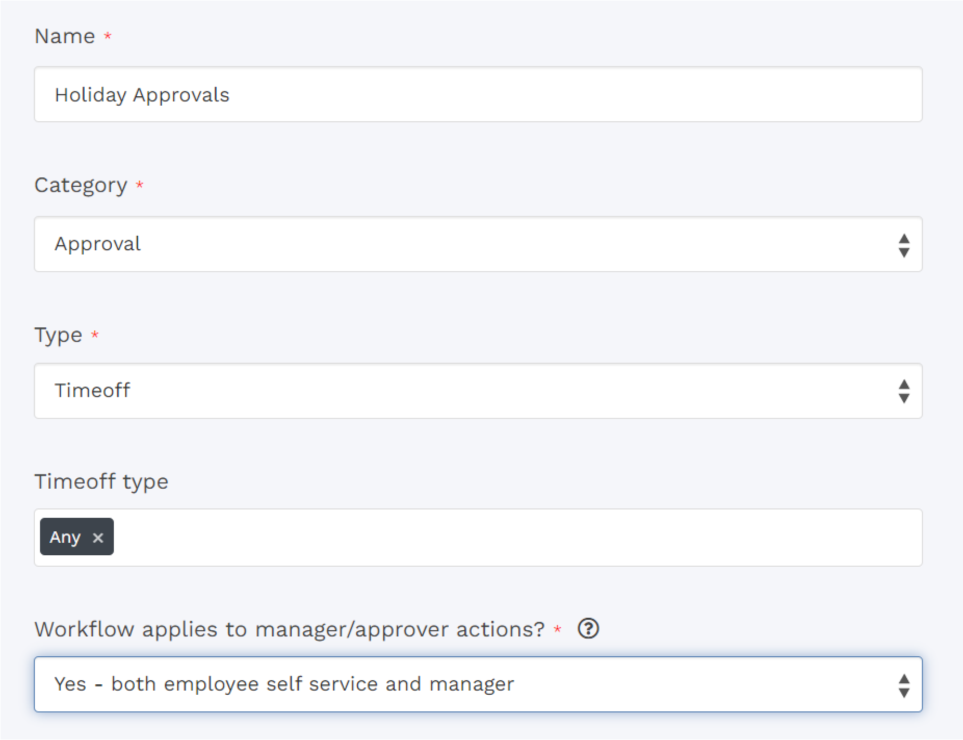
Setting up the skeleton:

Similar to the previous workflow we have created, we'll need to set up the skeleton using the 'Add' button at the bottom of the workflows home screen via Administration > HR > Workflows > Workflows.

Once you're on the add screen, the workflow rules will need to be set up as follows:



What do these settings mean?

- The approval workflow will trigger automatically once a request that requires an approval has been made.
- Time off type means that the request is looking specifically for any employee time off approvals.
- The time off type set to 'Any' indicates that the workflow will apply to all time off types. You can always set this to a specific time off type such as sickness, maternity leave, etc.

Setting up an approval workflow for time off will disable the default process. Please ensure that you're covering all types of time off with either single or multiple workflows before setting these active.

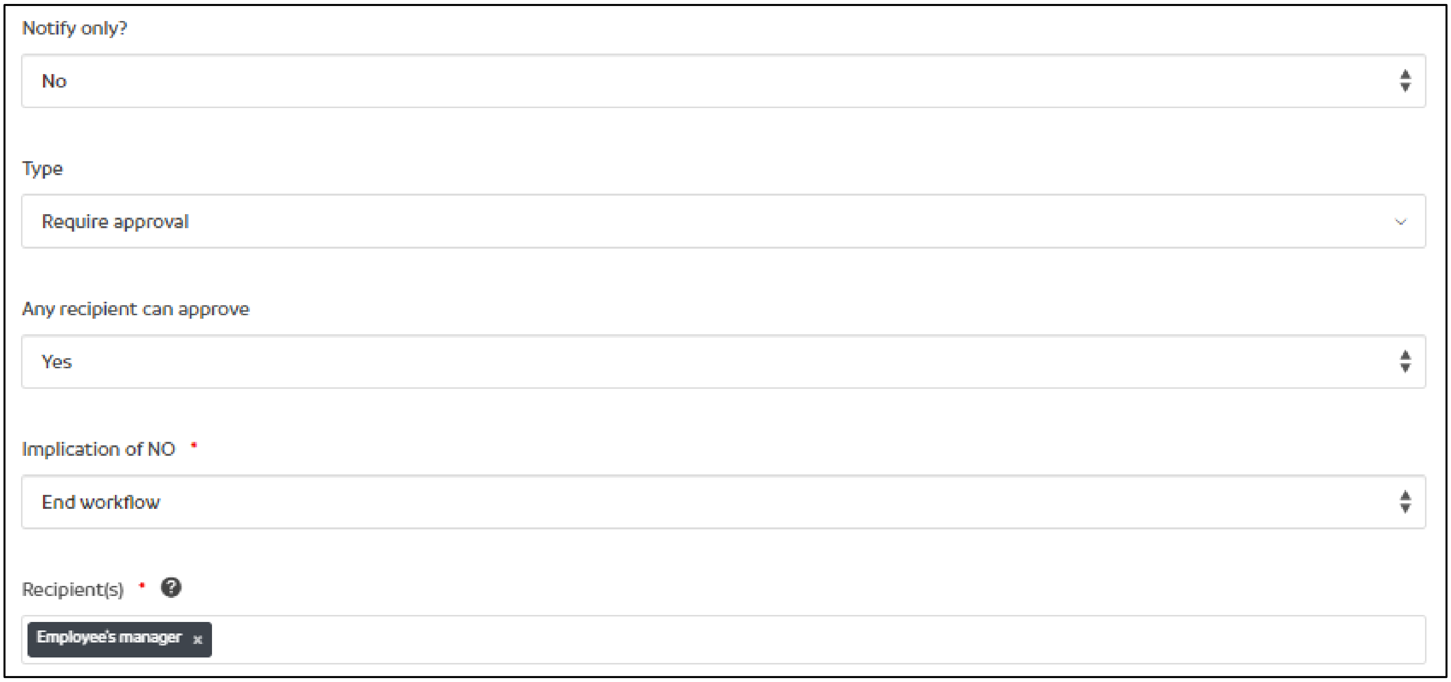
Similarly, to the Birthday Workflow, you can define your permissions in the same way ensuring you set the active status to 'No'.

Once the above is set, you can select 'Submit' to go into the workflow step builder.

Defining the steps:

This particular workflow will be made up of two approval steps. The first approval will be going to the employee's manager while the second will be going to the employee's head of department.

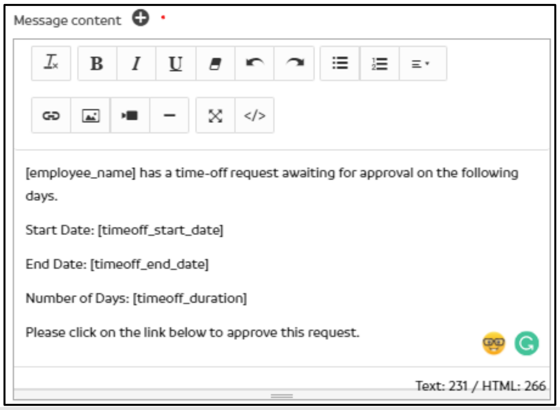
The first step would be set up as followed:



What do these rules mean?

- The steps require an action rather than being just a notification.
- The step requires an approval action to be completed by the employee's manager. You could always add in multiple recipients if needed by clicking in the blank space next to the previous added recipient to open a new selection dropdown.
- If the approval is declined, the workflow will end.
- The employee's manager will receive the step action.

The email content can be set up in the same way as the birthday notification:



Any tick boxes can be left unticked due to the email not displaying as plain text or is considered as sensitive information.

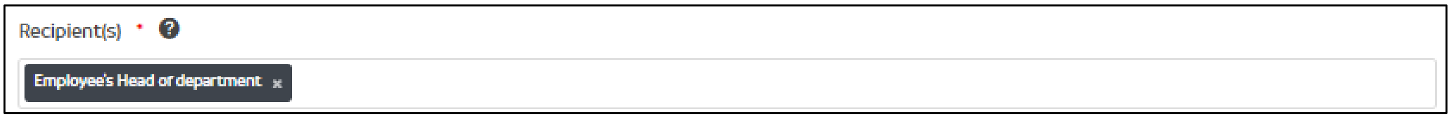
The trigger rule can now be set up with the aim for the email to trigger immediately upon the request being made:

The final option that we have on this screen creates an escalation. You can open the options for this by clicking the escalations options tick box.

This option allows you to escalate any workflow step that has an assigned action. The example below shows that if the request hasn't been actioned in three days, a reminder will be sent to the manager. Please note that you can only have five escalations per step.

Once this step is complete, you can go ahead and click on 'Submit'. Upon clicking submit, you'll be taken to a new workflow step "add page" where you can begin to set up your next workflow step.

The second and final step of the workflow is set up in the same way except for the message content and the recipient. As such, you can repeat the above process but instead of selecting "employee's manager" as the recipient, you'll select "Employee's Head of department" as shown below:



You'll also need to define the point at which this goes out to be once the previous step has been completed. As such, your "When should this happen?" statement will read as below:

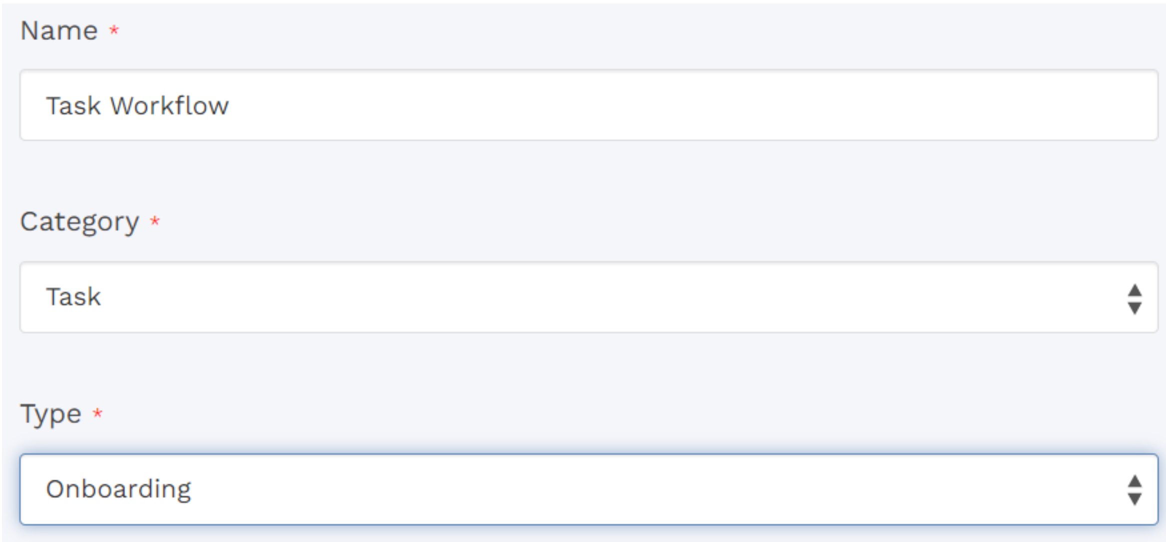
3. Task Workflow:
New Starter Account & Details

Build a simple onboarding process that provides a new hire with key information central to an employee’s HRWize account.

Setting up the skeleton:

As with the other workflows, you'll start the process by clicking 'Add' at the bottom of the workflow screen found by going to Administration > HR > Workflows > Workflows.

Once on the workflow edit screen, you'll need to set the rules up as follows:



What do these settings mean?

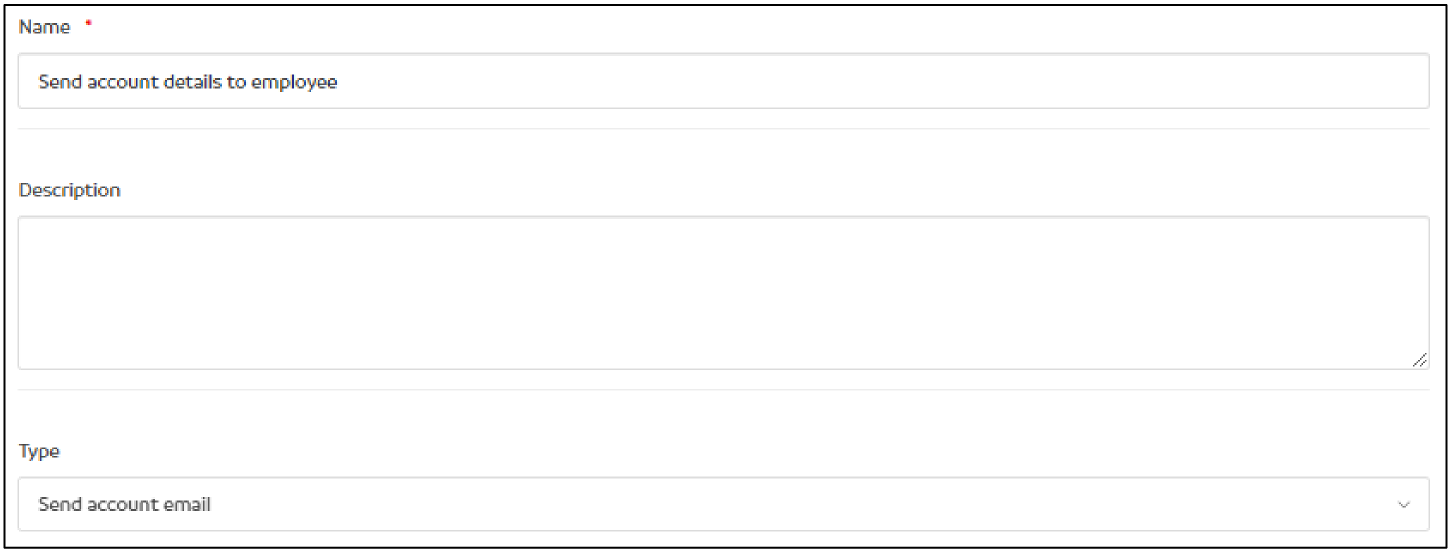
- The workflow is a manually triggered task which can be published to your users.
- The workflow will be available within the employee add screen as an onboarding process.

Following the same pattern as the previous workflows, you'll need to set this workflow with the relevant permissions and <u>set the active status to 'No' to avoid impacting your current users</u>. You can then click 'Submit' as it takes you the workflow step builder.

Defining the steps:

The particular workflow will be made of four steps – one step will generate the employee account and three identical steps asking an employee to enter their details.

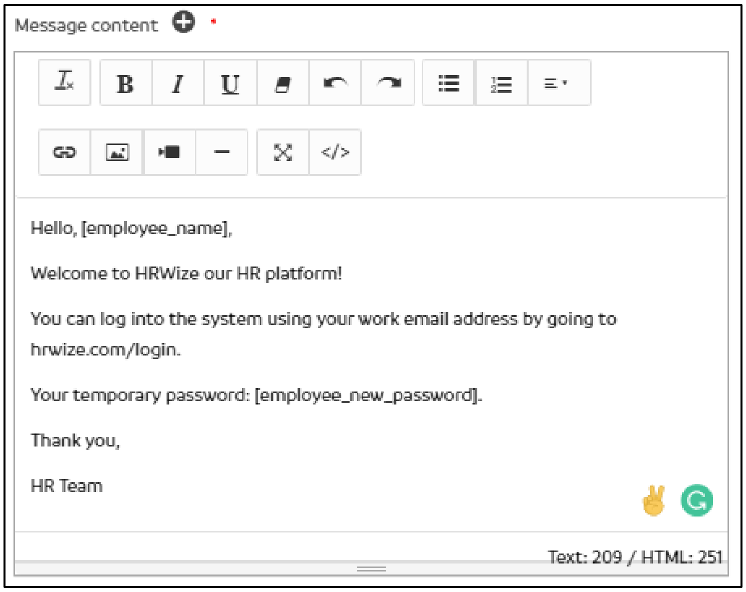
The first step will be set up as follows:



What do these settings mean?

- When the workflow is triggered, the step will create and generate a password for the user.
- An email notification will then be sent to the employee.

You can then set up the email content in the same way as the previous workflows. It is worth noting that you would need to add the [employee_new_password] field tag into the workflow for the employee to see their new password.

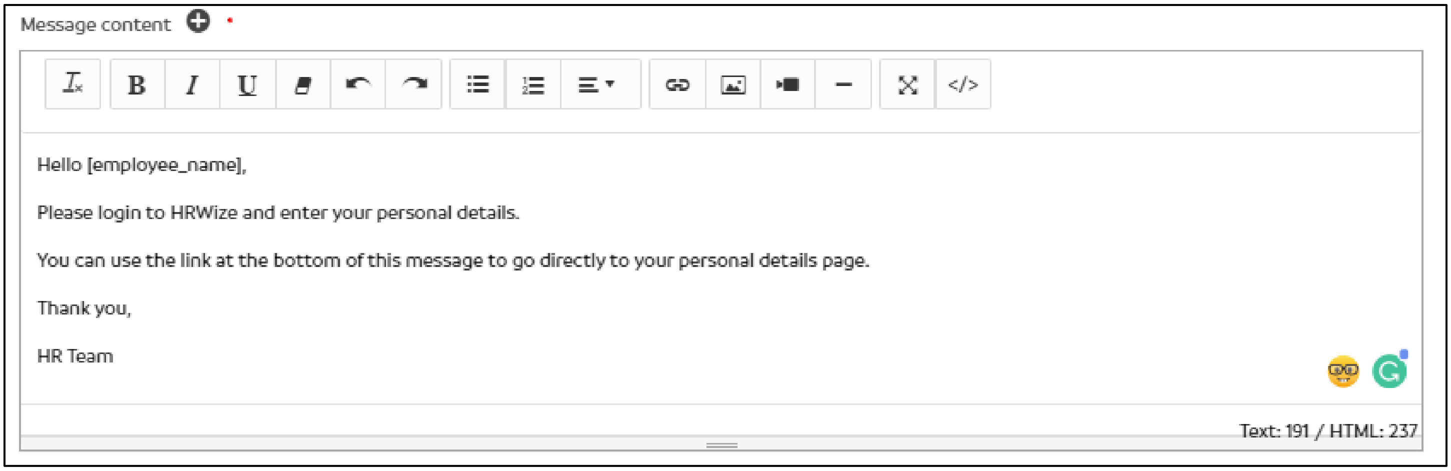


An email notification can be set up by sending it out at a specific time. The example below shows the account is created on the employee's first day to assist with the onboarding process.

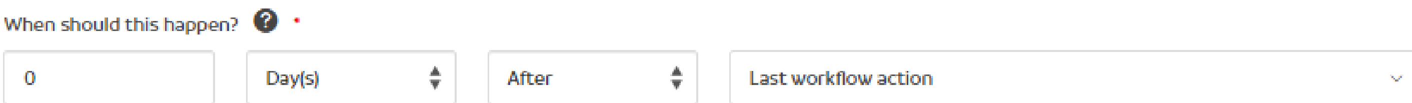
Once these options have been set, your first step is complete, and you can select submit to add this to the workflow.

The remaining three steps of this workflow all use a similar field type. Firstly, you'll need to define the statement and create the email content. The steps below will show you how to send the notification out upon employee access.

The email content has been filled out to let the employee know they need to enter their details in HRWize.



Once access has been granted, we'd want the process to be sent to the employee, so we need to send this out upon the last action being completed.



It's important to keep in mind that 'Last workflow action' steps will trigger when the previous is fully complete. For example, a completed field being filled in on a form or an assign to step being marked complete. This allows you to create a dependency chain for processes such as approvals where you require a previous step to be completed before you can continue.

You can then add in any relevant escalations now the step has been completed.

To finish the process, you'll need to set up another two steps in the same way but rather than selecting "employee enter address" as the type, you'll need to select "employee enter bank details" and "employee enter emergency contact" accordingly.

Once everything is set, this workflow is complete, and you can set this to active if you want to run this as part of your onboarding process.

Thank You!

You're on your way on becoming a HRWize workflow expert.