HRwize

Workflows

User Guide

www.hrwize.com

May 2020 – Version 3.0

Workflow Concepts

Within HRWize, we have default workflows built-in for all actions that require approval such as adding time off, training, expenses, mileage, timesheets and so on.

These standard workflows generate notifications emails to employees, managers, and approvers as well as sending reminder emails if a request should not be approved within a predefined period.

Additionally, we have specific workflows available for onboarding, offboarding and recruitment.

With this release, we are adding the ability to create totally custom workflows. These workflows are available in three distinct types:

1. **Approval** – A workflow for anything that requires approval such as time off requests, salary increase, etc. These requests will usually require approval of sorts, but that is not necessarily always the case.

2. **Tasks** – A checklist of which can be used for any process that requires actions to be completed or information to be checked such as onboarding a new employee or a recruitment process. A task is usually triggered manually.

3. **Continuous** – A workflow that runs on a schedule in the background and only triggers when a rule is met.

Adding a Workflow

Approval, Task and Continuous

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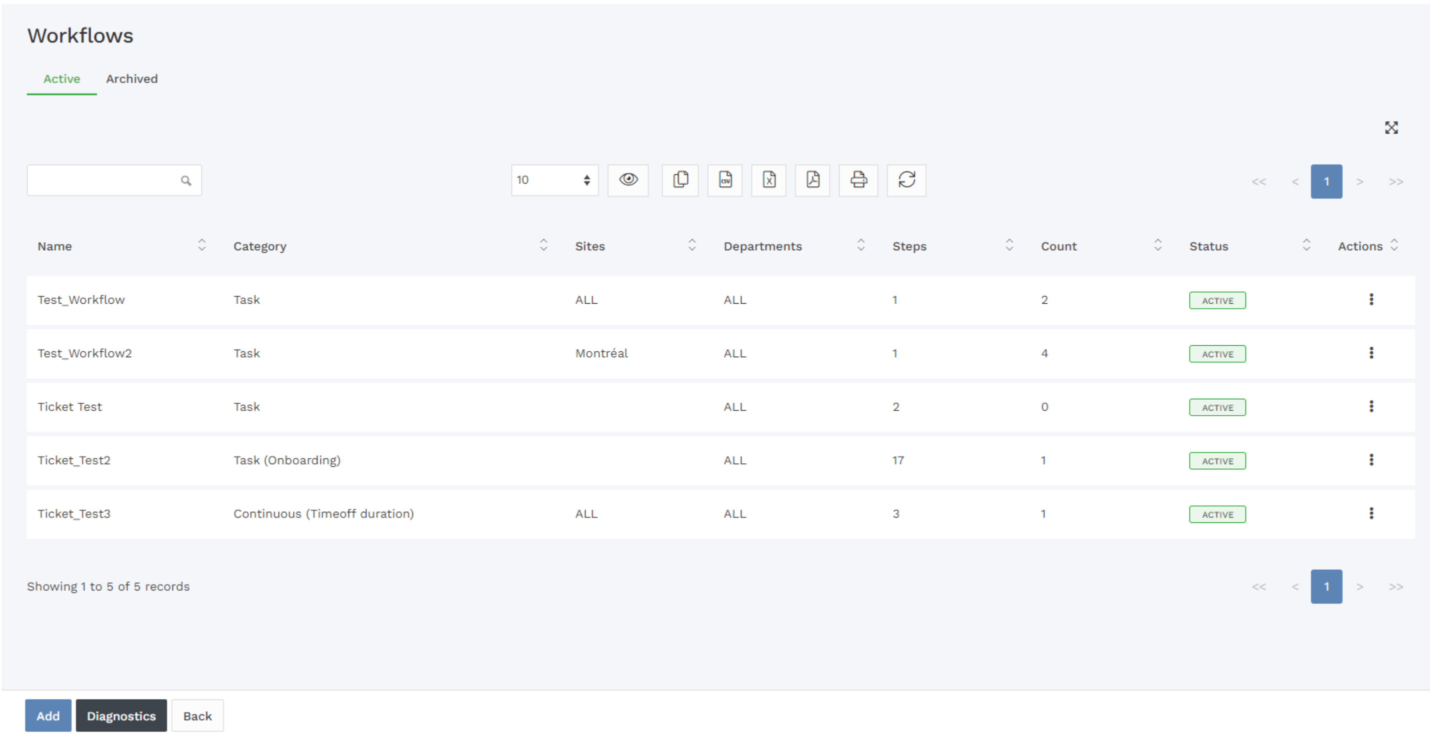
Adding a workflow

Workflows are accessed via Administration > HR > Workflows > Workflows (https://www.hrwize.com/hr/company/workflows/) – this is only available to HR and admin level users.

On this screen, you will see a list of all your current custom workflows (should there be any) – each workflow will be listed along with information on the type of workflow and any restrictions:


Workflows

Active Archived

Name	Category	Sites	Departments	Steps	Count	Status	Actions
Test_Workflow	Task	ALL	ALL	1	2	ACTIVE	⋮
Test_Workflow2	Task	Montréal	ALL	1	4	ACTIVE	⋮
Ticket Test	Task		ALL	2	0	ACTIVE	⋮
Ticket_Test2	Task (Onboarding)		ALL	17	1	ACTIVE	⋮
Ticket_Test3	Continuous (Timeoff duration)	ALL	ALL	3	1	ACTIVE	⋮

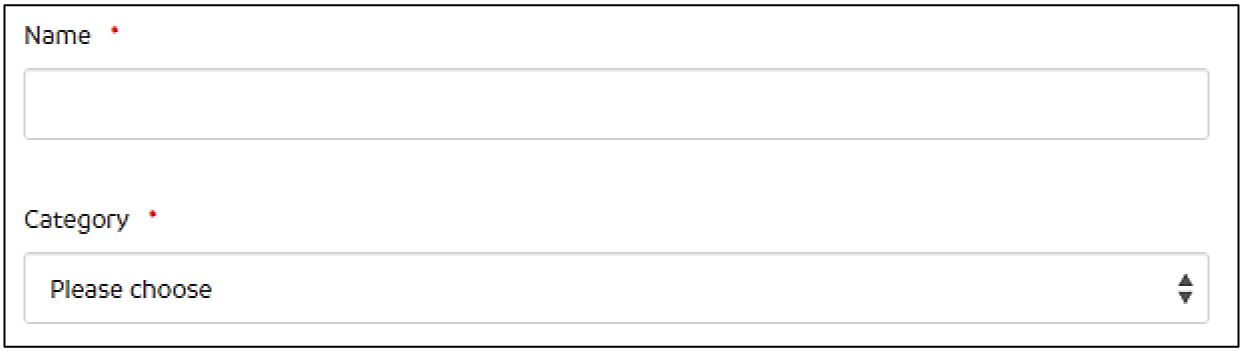
Showing 1 to 5 of 5 records

Add Diagnostics Back

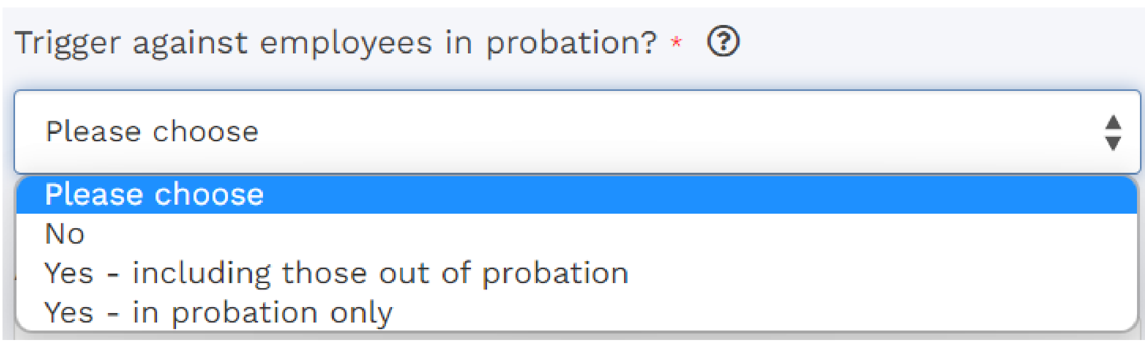
What do these columns in the table mean?

- The category column will show if the workflow is set as task, approval, or continuous with its corresponding type.
- The departments and sites columns allow you to have different workflows for different locations and departments.
- The steps column shows the number of steps currently in the workflow.
- The count column tells how many employees are using this workflow.
- The actions column allows you to modify the name, view the workflow list, change the workflow steps, set the workflow active or inactive, and delete the workflow when one becomes necessary.

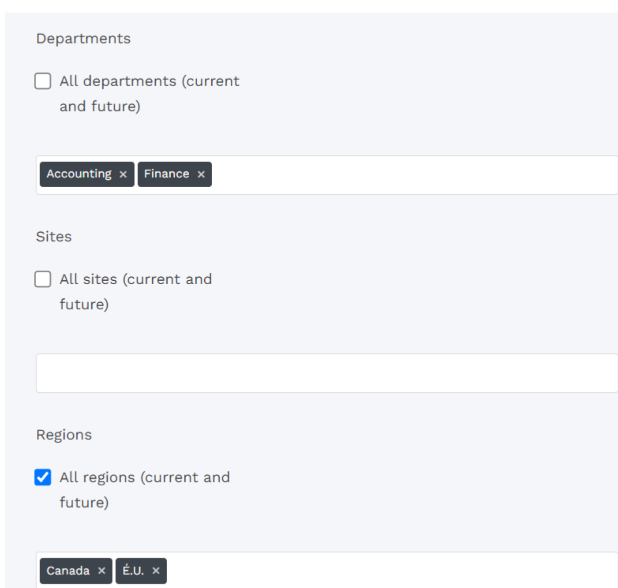
When adding a workflow, you will be presented with different fields for you to complete. First, you need to enter the name of your workflow and the category and type of workflow. Please see page 6 for more information:



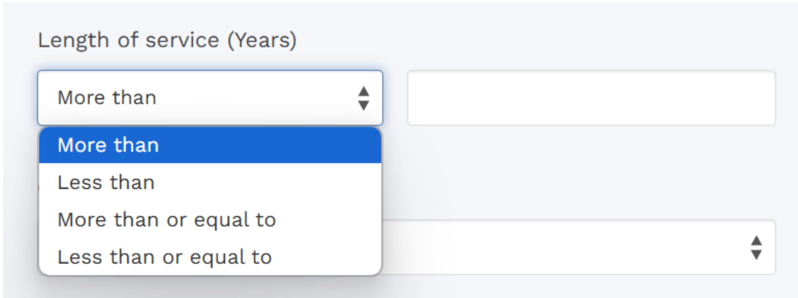
You will have to choose whether this workflow is set to trigger employees on probation. An employee is classed as being in probation if their probationary end date is set to the future – if the date is blank or is in the past, they are classed as being out of probation:



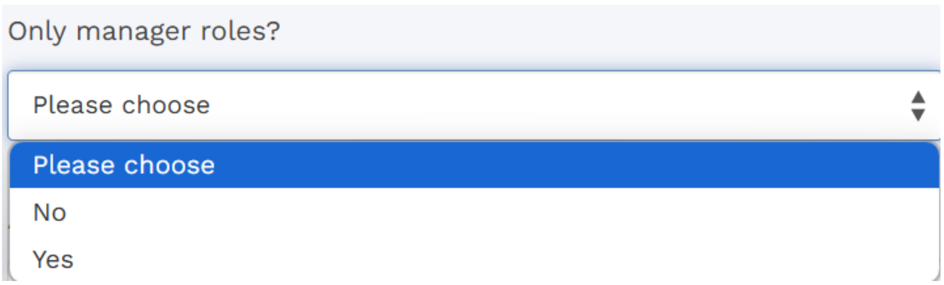
Next, you will have a series of choices that can be manipulated to restrict access to the workflow depending on region, department, sites, and more. You will have the option to display them to all of each field, or only specific ones pertaining to your company.



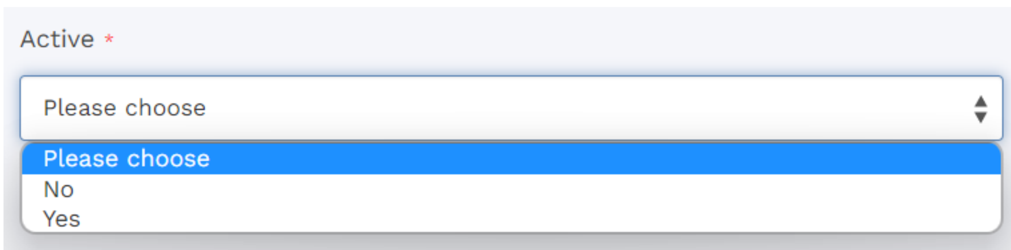
Below this, you will have the option to specify a “length of service” in years, which will restrict the workflow based on the amount of years an employee has been employed for:



Additionally, you may specify whether you want this workflow to apply only to employees with manager roles:



Finally, you will have to set the workflow as being active or not. This is a mandatory field.



When you have entered necessary fields, click on “Submit”, and you will be automatically redirected to the Workflow Builder for your newly created workflow. Alternatively, you can access the workflow builder for any workflow from the workflow listing screen by clicking on the builder icon in the Actions column.

Approval Workflows

Approval workflows are designed to follow an action whenever the system requires a submission to be approved or declined such as time off requests, training requests, etc.

They automatically replace the system’s default workflow and trigger immediately based on the assigned trigger type.

Here are the trigger types:

- **Allowance Change** – The workflow will trigger whenever an employee time off allowance is adjusted;
- **Expenses** – The workflow will trigger whenever an expense request is submitted;
- **Job Change** – The workflow will trigger whenever a change is made to the employee's job on the employee's "change" page;
- **Mileage** – The workflow will trigger whenever a mileage request is submitted;
- **New Employee** – The workflow will trigger whenever a new employee is added to the system;
- **Recruitment Requisition** – The workflow will trigger whenever a manager raises a requisition request that must be approved by Admin/HR/Recruiters;
- **Salary change** – The workflow will trigger whenever an employee's salary is changed in either the employee's "change" or "benefits" page;
- **Timeoff** – The workflow will trigger whenever a time off request is submitted;
- **Timeoff deletion** – The workflow will trigger whenever a time off request is deleted;
- **Timesheets** – The workflow will trigger whenever an employee submits a timesheet;
- **Time tracking** – The workflow will trigger whenever a time tracking record is created that requires approval;
- **Training** – The workflow will trigger whenever an employee or manager requests training.

Task Workflows

Task workflows are typically manually triggered by using the publish button on the workflows screen though you can also automatically trigger these workflows from actions within the system.

The options listed have no bearing on how the workflow triggers or functions. They are simply used as identifiers:

- **Onboarding;**
- **Offboarding;**
- **Recruitment;**
- **Task.**

Continuous Workflows

Continuous workflows run in the background and look for a situation that matches the specific criteria and then triggers.

These trigger in batches overnight and are usually triggered following a change or an event:

- **Calendar** – The workflow will trigger based upon certain calendar days. These can be set to relative dates which are based around potentially changing dates such as the first Friday of every month. They can alternatively be set to absolute dates which are specified dates such as "January 12";
- **Changes** – The workflow will trigger whenever a change has been made. This can be set to trigger on various options such as "Start date" and "Last working day;
- **Trigger date** – The workflow will trigger once on a specific date that is based on the FIRST item in the attached workflow. Please note, this will not trigger on the earliest date - it will always be based on the first in the list. This is useful for things such as employee birthdays and so on;

- **Expenses cost** – The workflow will trigger when the selected expense falls within a specified cost range;
- **Mileage distance** – The workflow will trigger when an employee's mileage distance falls within a specified range;
- **Mileage cost** – The workflow will trigger when an employee's mileage costs fall within a specified range**;**
- **Time off duration** – The workflow will trigger when an employee's time off duration falls within a specified range. You can also set a trigger date for this. If a trigger date is set only time off instances after this date will be counted in the calculations for checking for occurrences of time off;
- **Time off instances** – The workflow will trigger when the employees' number of time off instances falls within a specified range;
- **Employee age** – The workflow will fire when an employee's age matches the conditions give

Workflow Builder

Steps, When, Escalation Path

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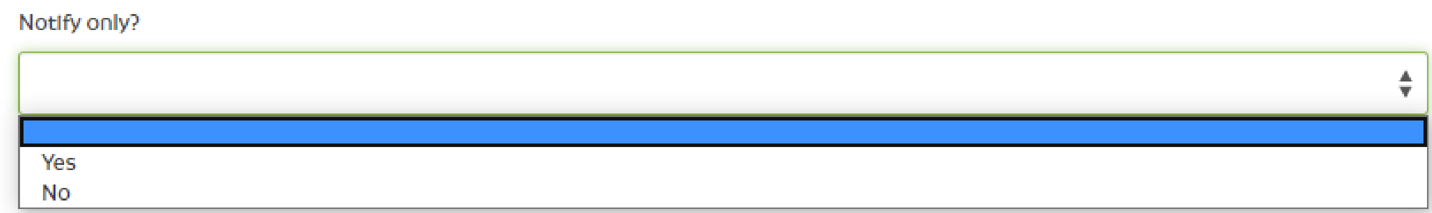
Workflow Builder

Regardless of the workflow type, a workflow is made up of a series of steps that need to be actioned to allow the workflow to be completed.

To create a step, click on the ‘Add’ button on the workflow screen and this will load the step builder. The actual layout will vary slightly depending on whether you are building an approval, task or continuous workflow.

Approval Workflow Option

The only difference between these three workflow categories would be that the approval workflow category is the only category that has the “Notify only?” field.



This field does the same as sending an email, however, the main difference would be that when a request is declined, all steps that are marked ‘Yes’ will still trigger. Hence, the email will be delivered whereas those with a type of “Send email to specified recipient” and “Send email to (external) email address” will not.

For example, if declining a promotional request, the manager who submitted the request can still get notified of the outcome, but none of the other people who you wanted to notify such as Finance will get their emails as they would only send if the request was approved.

Common Workflow Builder Options

When you add a workflow step, some common fields apply to most of the options. These are predominantly time-based fields that control when you want the action to happen and how to deal with escalation.

Steps

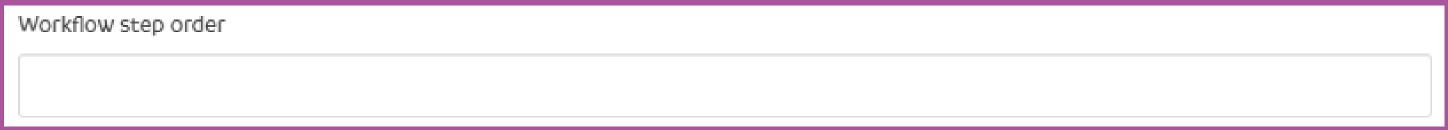
When building any of the different types of workflows, there is several different types of steps which can be created. Each of the different step types denote an action that will take place as part of the workflows.

Here is a list of the different step types with its corresponding description:

- **Assign to** - Assign a task to an individual which appears under the user’s notices until it is completed;
- **Create template** - Create a pre-populated message using a template created through Documents > Templates;
- **Schedule meeting** - Set up a meeting between the assigned employee and the chosen individual;
- **Send account email** - Sends an email to the assigned employee with their account details;

- **Send document for signing** - Sends a document from your company document folder to the employee to be digitally signed;
- **Send email to (external) email address** - Send an email to an external email address. You can use multiple email addresses here by separating the addresses with a comma;
- **Send email to specified recipient** - Send an email to a specific individual assigned by the system based on your selection;
- **Send existing form** - Send a form previously included in the workflow to an internal named recipient;
- **Send existing form (externally)** - Send a form previously included in the workflow to an external email address;
- **Send form which triggered Workflow** - Send a form completed outside a workflow to an internal named recipient;
- **Send link to document** - Send a link to a company document;
- **Send link to page** - Send a link to a specified URL address;
- **Send link to Report** - Send a shared report to a workflow recipient;
- **Send new form** - Send a new copy of a form created in the form builder;
- **Yes / No** - Send a task to the assigned individual which requires a yes/no answer. This is like a branch in the workflow where you ask the question and the flow of the workflow is then determined by the answer:
    - If you choose 'Yes' to this question, the workflow will simply move to the next step;
    - If you choose 'No' there are 4 additional choices which you can select:
        - *End workflow* - This ends the workflow and declines all following steps;
        - *Trigger workflow* - This will trigger an additional workflow. Until this workflow is fully completed, this step will show as pending;
        - *Move to next step* - this answer the question as no but, in effect, allows the workflow to continue;
        - *Move to specified step* - this allows the workflow to loop back to an earlier step which then creates a loop. For example, if you required the user to do something and it was not done correctly, selecting no and move to specified step could send this step back to the user to do again before looping back to the Yes/No answer again and so on.
- **Yes/No - including existing form** - Shows the content of an existing form on a Yes/No step;
- **Employee enter address** - Creates a task for the employee to enter their address;
- **Employee enter bank details** - Creates a task for the employee to enter their bank details;
- **Employee enter emergency contact** - Creates a task for the employee to enter their emergency contact details;
- **Employee upload document** – Creates a task for the employee to upload a document
- **Asset check** - Check the system to see if a specific asset is assigned;
- **Bank details check** - Check the system for whether the employee's bank details have been fully entered;
- **Document signature check** - Check the system to see if a specific document has been signed;
- **Emergency contact details check** - Check the system for whether emergency contact details are present;
- **Form check** - Check to see if a specific form has been completed;
- **Mandatory document check** - Check the system for whether a mandatory document is present;
- **Personal details check** - Check the system for whether an employee's personal details have been fully entered;
- **Training check** - Check the system for whether an employee has completed a specified training course;
- **Trigger Workflow** - Trigger an additional workflow;
- **Send link to candidate's CV** - Send an email link to the candidate's CV;
- **Send link to candidate's File** - Sent a link to the candidate's file;
- **Update recruitment stage** - Update the recruitment stage of an associated requisition

There is an option called "Workflow step order":



The system will allow you to drag and drop workflow steps after assigning a field order. Please use this option with caution! Dragging and dropping a workflow step can create corruption – make sure to use this option a safer way with the correct step orders.

When

The core part of any workflow is when you want the action to be triggered. There are four parts to "When?":

1. **Number** – This is the number of days, weeks, or months (Please Note – 0 is a valid number, thus, if you want something to happen on a specific trigger point, you can set 0 as the number).
2. **Period** – Option of days, weeks or months.
3. **Relative** – Before or after.
4. **Trigger point** – The date within HRWize or the workflow itself where you wish to trigger the workflow. The valid options for trigger points are:
    a. *Start date* – The employee's start date;
    b. *Leave date* – The employee's leave date;
    c. *Contract end date* – The date an employee's contract expires/end;
    d. *Resignation date* – The date an employee resigns;
    e. *Last working day* – The employee's last working day;
    f. *Probationary period end date* – The last day of an employee's probation;
    g. *Birthday* – The date of the employee's birthday;
    h. *Anniversary date* – The yearly anniversary of the employee's start date in the current year;
    i. *Submission date* – The day that a form or change is submitted;
    j. *Creation date* – The day the form is assigned or published to the employee;
    k. *Last workflow action* – Immediately after the previously step is performed. Please note that the order of your workflow steps is critical when using this trigger, or your working may trigger in the wrong order;
    l. *Employee document expiry date* – The date an employee's document expires;
    m. *Interview date* – The scheduled interview date for a candidate on the system;
    n. *Time off start date* – The start day of an employee's time off;
    o. *Time off end date* – The last day of an employee's time off;
    p. *Training expiry date* – The day an employee's completed training expires;
    q. *Start of current holiday year* – The first day of your holiday year;
    r. *Start of current financial year* – The first day of your financial year;
    s. *None* – This workflow step does not fire.

"Creation date" is the best option to select if your workflow is designed to give actions that you want the associated user to address as soon as the workflow is activated. Setting this to “0 days after creation date” will cause the workflow to fire immediately upon publishing.

Escalation path

The escalation path is used to control what you want to happen when the required task doesn’t take place by “When” date creation above. Similar to “When”, it specifies a number, a period and its action.

The valid actions are:

1. **Send reminder** – This will resend the original email to the assignee;
2. **Escalate to manager** – This will send the original email to the assignee’s manager;
3. **Escalate to manager’s manager** – This will send the original email to the assignee’s manager’s manager;
4. **Escalate to approver** – This will send the original email to the assignee’s approver;
5. **Escalate to super approver** – This will send the original email to the assignee’s super approver;
6. **Escalate to Head of department** – This will send the original email to the head of the assignee’s department;
7. **Escalate to Head of HR** – This will send the original email to the assignee’s Head of HR;
8. **Escalate to HR Business Partner** – This will send the original email to the assignee’s HR Business Partner
9. **Escalate to HR mailbox** – This will send the original email to the HR mailbox;
10. **Escalate to Finance mailbox** – This will send the original email the Finance manager;
11. **Escalate to Recruitment mailbox** - This will send the original email to the recruitment mailbox;
12. **Escalate to Training mailbox** – This will send the the original email to the training mailbox;
13. **Approve** – This will, in effect, bypass this step and mark as completed;
14. **Trigger workflow** – This will give the option of triggering another workflow should the escalation process required be more complex than simple sending a reminder or escalating to the above-named people.

The logic behind “When” and “Escalation path” is best demonstrated with an example shown below:

In this example, the action should be checked for 1 week after the employee’s start date. If this is not completed, then in 3 days, a reminder will be sent to the employee.

HRwize

Sending a Message (Email)

Common Workflow Step Type for All Workflow Categories

Version 3.0

Sending a Message (Email)

The recipients drop down allows you to choose who the request will go to base on either their role or a named user. The available options are:

1. Employee – Placeholder for the employee that the workflow will be sent to;
2. Candidate;
3. Employee’s manager;
4. Employee’s approver;
5. Employee’s super approver;
6. Employee’s manager’s manager – The employee’s second level manager;
7. Employee’s head of department;
8. Hiring manager;
9. Requester;
10. HR mailbox – The email address defined in settings for HR mailbox;
11. Finance mailbox – The email address defined in settings for Finance mailbox;
12. Training mailbox;
13. Facilities mailbox.

You can also choose a specific employee you want to send by scrolling down the dropdown, and it will display all your employees in your organization.

Once the recipient has been chosen, you will need to specify the content of the email which is sent – you can specify and customize both the subject and body.

Please note that if the request requires an action or approval, the link will automatically be included in the email – you do not need to add the link each time.

When entering text, you want to use system fields in the email subject or content, by choosing from the following table below. When entering text with system fields, please ensure that you enter these with square brackets around them. Thus, when the email is sent, these system fields will be replaced by the system value for that field for the current request.

For example, if you enter “[employee_first_name] [employee_sur_name] time off request” for an employee named “John Smith”, the email would display as “John Smith time off request”.

[employee_first_name] [employee_sur_name] [employee_works_id] [employee_work_email] [employee_work_telephone] [employee_start_date] [employee_leave_date] [employee_contract_end_date] [employee_dob] [employee_birthday] [employee_probation_date]	[candidate_first_name] [candidate_sur_name] [candidate_email] [candidate_telephone] [candidate_role_applied_for] [candidate_apply_date] [candidate_stage] [candidate_available_date]	[timeoff_type] [timeoff_start_date] [timeoff_end_date] [timeoff_duration] [training_name] [training_location] [training_start_date] [training_end_date] [training_duration] [expenses_name] [expenses_total] [expenses_date] [mileage_name] [mileage_total] [mileage_date] [timesheets_name] [timesheets_date]	[current_salary] [new_salary] [current_hours_per_week] [new_hours_per_week] [current_working_days] [new_working_days] [employee_current_job_title] [employee_current_office_name] [employee_current_department] [employee_current_cost_centre] [current_manager_first_name] [current_manager_sur_name] [current_manager_work_email] [employee_new_job_title] [employee_new_office_name] [employee_new_department] [employee_new_cost_centre] [new_manager_first_name] [new_manager_sur_name] [new_manager_work_email] [effective_date]

Assigning a Workflow to Employees or Candidates

Specifically, for Task Workflows

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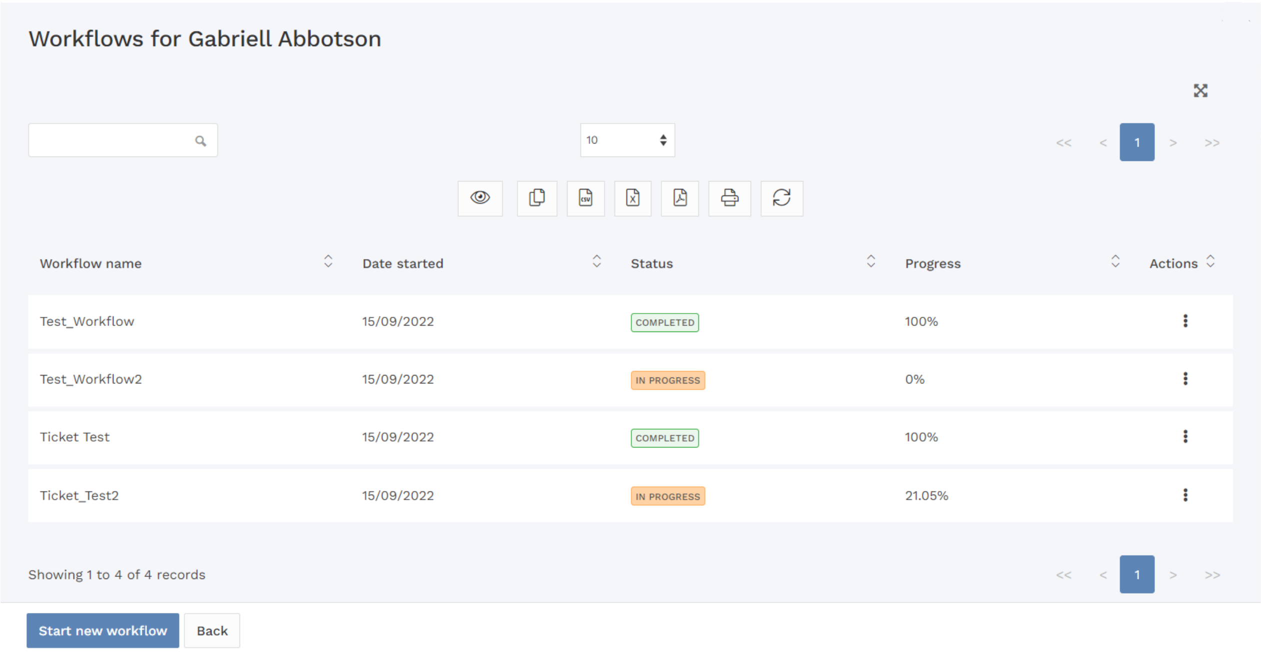
Assigning a Workflow to an Employee or Candidate

Once you have created your workflow, you need to assign them to an employee or candidate. You only need to do this for task workflows, as approval and continuous workflows will be automatically assigned when the employee submits a relevant request, or it meets a specific criterion.

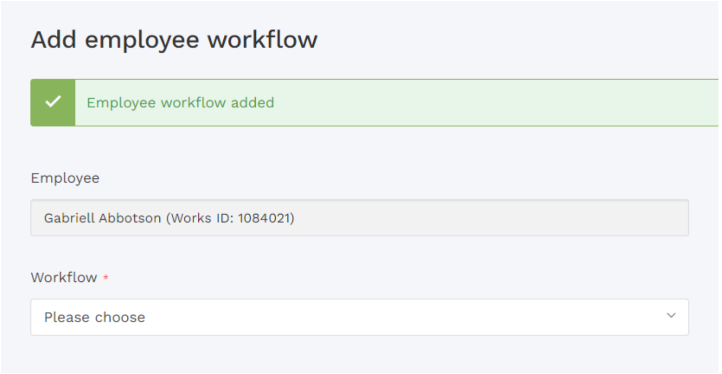
There are two ways to assign a workflow to an employee:

First, you can go to the employee's or candidate's file and click on Workflows under the "Documents and Workflows" tab on the right. This will show you all the current task workflows for this individual.



In the above list, you can see the date they started this workflow, the current status with a progress percentage.

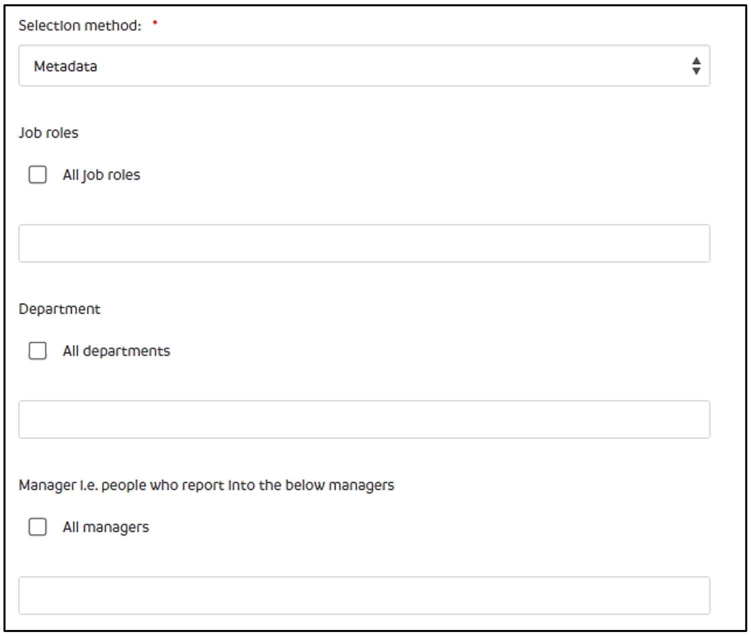
To start a new workflow, click on 'Start new workflow' at the bottom left. Then, choose the relevant workflow from the dropdown and click on 'Submit'. You will then get a confirmation message button to view the workflow that will appear next to the submit button as shown in the image below:



Another way to assign a workflow to an employee is to go to Administration > HR > Workflows > Workflows. Once there, you will notice three dots under the Actions column on every Task Workflow. Click on the three dots, and then “Publish Workflow”.

Name	Category	Sites	Departments	Steps	Count	Status	Actions
Test_Workflow	Task	ALL	ALL	1	4	ACTIVE	⋮

Once in the “Publish workflow”, you can select the method in how you want to choose your employee. You can choose a specific employee or all employees, or you can choose the metadata where this will let you choose a specific job role, department, site, etc.

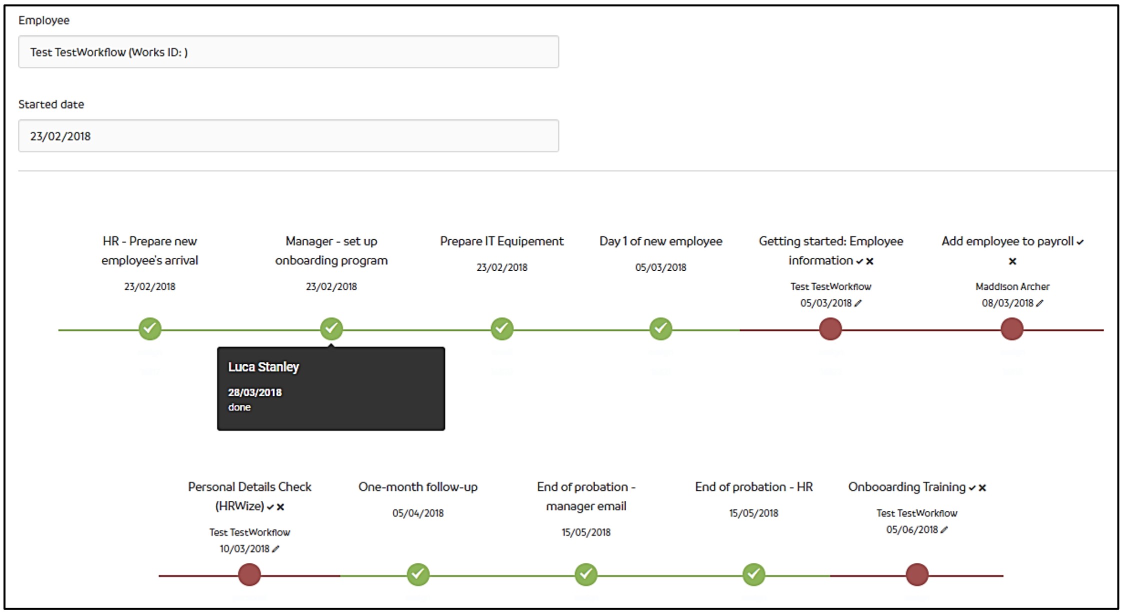


View Workflow Progress

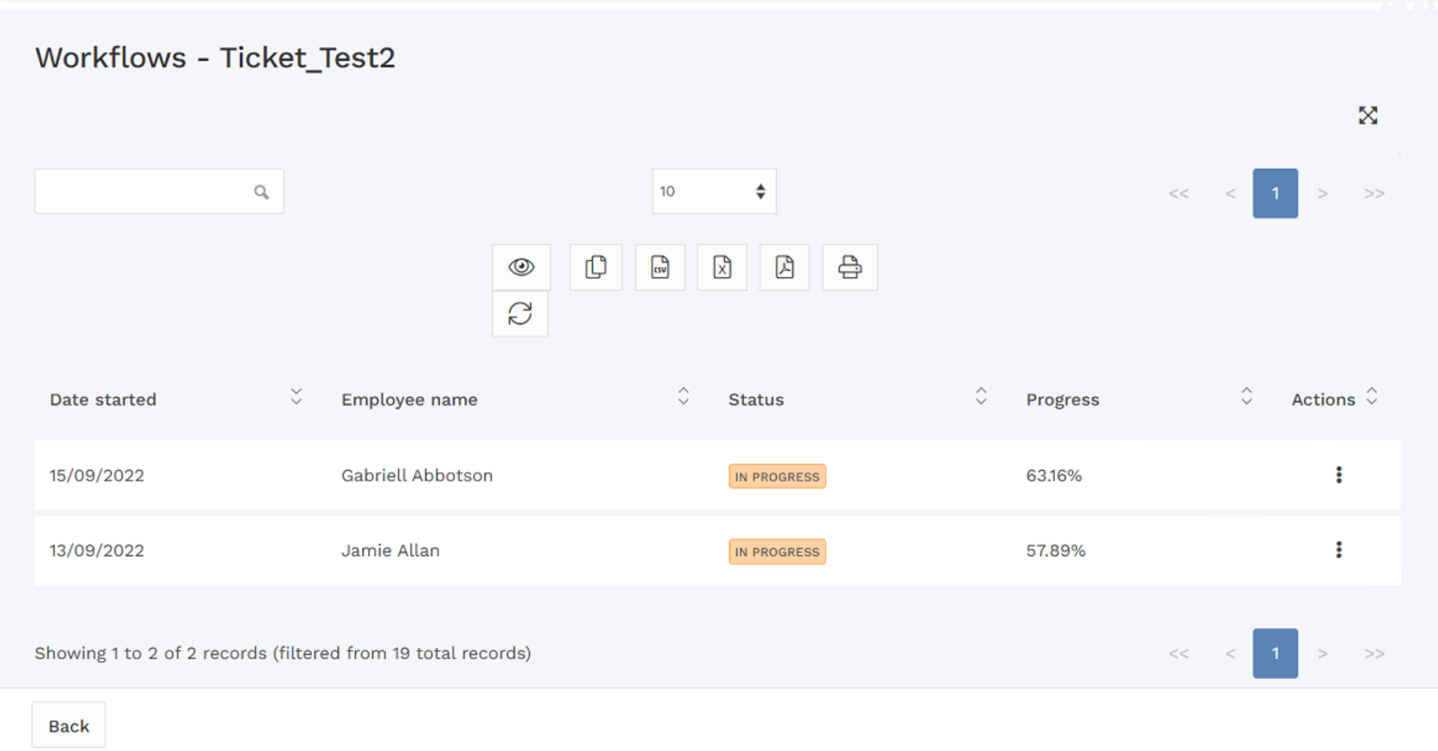
When you have assigned a task workflow to an employee or candidate, you can then view the progress of the actual workflow.

Go to the employee or candidate's file and under Workflows, click on the view icon next the workflow in question. This will then show you each step in the workflow and will show you visually the progress.

As steps gets completed, the various steps will change red to green to indicate they are completed. Additionally, on completed steps, you will be able to hover over the green box and see who completed the step and when.



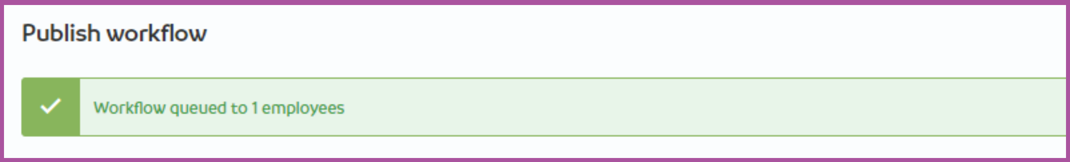
You can also the view all employees' progress by going to Administration > HR > Workflows > Workflows, and then clicking on the three dots underneath "Actions", followed by entering "View responses":



Workflow Queue

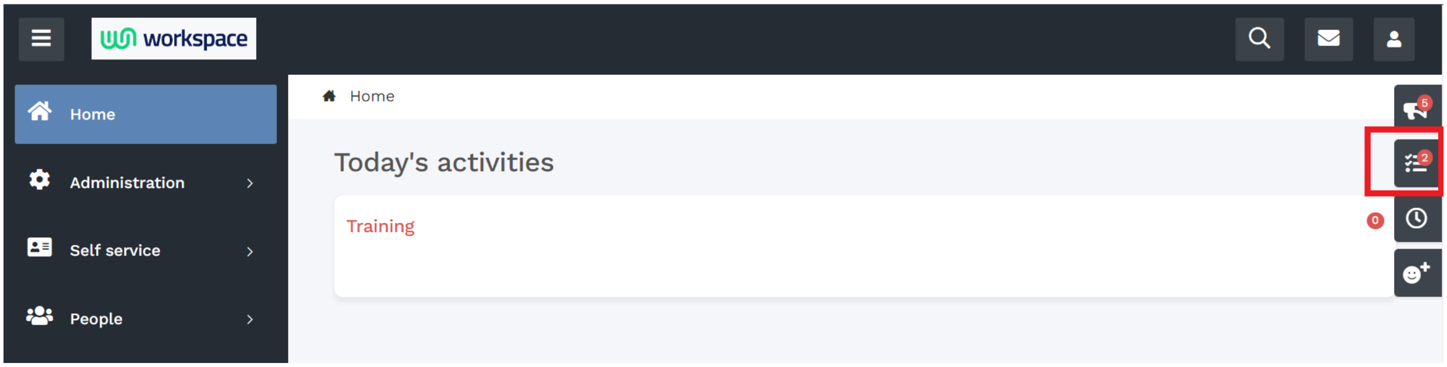
When triggering a workflow against multiple employees, there is now a workflow will queue for a bath run. This queue runs and clears every 15 minutes.

With each 15 minutes batch run, every item will be cleared down from pending to either processed or failed.

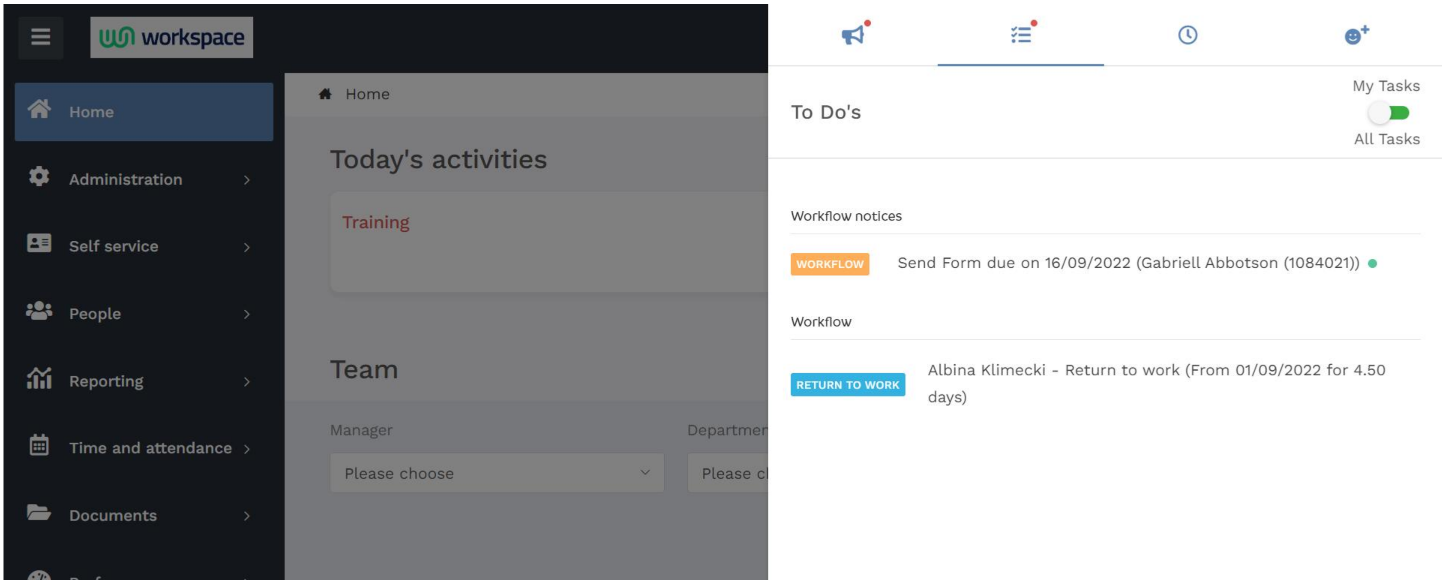


Action a Workflow Task

When a task is assigned to an employee, they will receive an email that was created a part of the workflow step creation. Additionally, when they login into their HRWize account, they will also notice on their home screen highlighting the workflow task.



Clicking on the icon highlighted in red on the right of the screen will open up the list of workflows that the user holds.



To action the task, click on the 'Task' in question. They will then either be required to enter a completion date and comments (for a "normal" task assign) or click 'Yes' or 'No' for a Yes/No question assign.

Workflow Timeframes

When a task is created, there are several options for trigger points and so on which will impact when things happen.

Some will happen immediately – for example, if an employee submits a time off request, the email for that time off request will be sent using the first step immediately.

However, in some case, depending on the choice of timeframes, the next steps will not happen immediately. This is especially in the case of setting steps link to a specific date.

For example, you set Step 1 to do something 1 day after the employee’s start date – this will only trigger during an overnight batch process for workflow so may not appear immediately.

Additionally, checking for escalations also happens overnight so a task may be overdue today, but the escalation or reminder email may not go out until tomorrow.