FAQ: Sequence of role holders

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A role is linked to permissions. These permissions determine which workflow tasks are bound to a role. The sequence (ranking) of the holders of a role determines the order in which the system presents these tasks.

What does the sequence do?

As a rule, requests etc. are always presented to the first person in the sequence.

Sequence 1: receives the tasks first.
Sequence 2: receives the task second.
Sequence 3: receives the task if 1 or 2 are not available or not present (vacation etc.).
Sequence 4: receives the task if only one or none of the persons ranked before is available or present.

If two employees are given the same sequence, e.g. 3, the one who was created first in the system receives the task first.

Who can be listed in the sequence?

In principle, an unlimited number of role holders can be defined for this sequence.
It is also possible to combine assignments of the sequence to groups and to persons as role holders.

Example
Vacation requests are decided first by the supervisor of the requesting person.
Second in the sequence is the supervisor's deputy.
If both are unavailable, the HR department decides.

How do you add new role holders to the sequence?

If you want to enter several role holders for the opened role, you can expand a search function using the feature **"Show/hide advanced search"**:

By selecting the competence targets (all, person, group, client) or by selecting the role holders (all, person, group, client), only the role holders matching the search terms are filtered out.

In addition, you can reverse the display order by clicking the small arrows next to the column headings "Competence target" and "Role holder".

With the "+" (plus) button you can create **additional role holders** for the role.

Click "Save" or "Save and close" to complete the process. The assignment takes effect from the selected "Valid from" date. If you selected the day on which you make the entry, it is visible in the role overview immediately.

How do you change an existing sequence?

Open the role holders of a role.

For the role holder who is to move up, change the sequence number to match the new order.

For the other role holders who are now to move down, correct the sequence numbers to match the new order.

Note: if the sequence number is the same, the creation date of the role holders decides who receives tasks and requests first!