Workflow Steps

Workflow steps

Here the process flow is populated with different role holders. The process flow is individually adapted to the company.

- To add new workflow steps, or to change or delete existing ones, click the **Workflow steps** tab.
- To add a new workflow step, click the "**Add**" button.
- **Name**
  Under Name, the role is selected. The role in first place is also the first in the process flow.
- **Action**
  For the action, you can choose between Approve (Reject) or Review.
- **Editable**
  Yes / No: This parameter determines whether a form becomes editable or not.
- **Immediate process termination on rejection**
  Yes > the process is terminated if approval is not granted;
  No > the process goes to the next decision maker, even if it was rejected.
- **Approve / review automatically**
  This parameter is particularly relevant when processes with several process stages are used and a role holder may occur several times in the process flow. If the parameter is enabled, the first decision is entered automatically by the system each time the role holder is up again in the process flow. If the parameter is disabled, the role holder must make a decision each time they are up in the process flow.
- **Selection of role holder at process start**
  With this parameter, the process creator can be given the option to specify one of the possible role holders (depending on the role selected under Name). If Yes is selected here, a checkbox also appears with which it can be defined whether the selection is mandatory. If the checkbox is not checked, the role can be left unassigned by the process creator and this process step is then skipped automatically.
- **Automatic action**
  Approve automatically or reject automatically > after a certain period (configurable) has expired, the selected action is executed automatically (approved or rejected). This action requires a periodically running job called WfCheckLimits[1].
  - **after x days**
    Specification of the days after which the selected action is performed automatically.
- **Do not show in ToDo list**
  If the checkbox is enabled, the request is shown under a separate menu item (the location in the menu tree can be chosen freely); if the checkbox is not enabled, the request is shown in the ToDo list (menu item Assigned requests)
- **Suppress email notification**
  If the checkbox is enabled, no email notification takes place
- **Move up or down**
  The central or decentralized role in first place is the first person in the process flow. With the arrow keys, a role can be moved further forward or backward in the process flow.
- **Delete**
  Existing workflow steps can be deleted by enabling the checkbox located at the far right of the corresponding row by clicking it.
- **Escalation**
  Escalation enables additional information for a specific role. It serves, for example, so that time correction requests for previous months additionally run through an escalation role. This makes sense

if manual activities are necessary for months that have already been settled and paid out, when time corrections are made for the past. The escalation level is carried out after the last approval.

- **Empty**: process runs without escalation
- **monthly**: if a process is submitted for a date before a defined day of the previous month and approved after the defined date, the process runs through the escalation level.
- **quarterly**: similar to "monthly" but relating to quarters.

NOTIZ

ATTENTION if no approver is provided in the process (request is approved automatically by the author > see item approve / review automatically), no escalation should be set, as otherwise the process is not executable.

1. /daisy/personalwolke-admin/1072-dsy.html?language=4