Practical Examples: Processes

Maintaining Existing Processes

To edit an existing process, click the process overview (Processes menu item) and select the desired process by clicking the edit icon in the corresponding row.

Once you have reached the detail view of a process definition, you can make the desired changes: changes to the workflow steps, error reasons, settings, ...

Creating New Processes

To create a new process, click the "New Process Definition" button bar. Then fill in the provided fields:

- **Name**
  Here you assign the process name.
- **Notify author**
  Here you can choose whether the author is to be notified. The following options are available:
  - Never: The author is never notified (regardless of whether the request was approved or rejected)
  - Always: The author is always notified (regardless of whether the request was approved or rejected)
  - On approval: The author is notified only when the request is approved
  - On rejection: The author is notified only when the request is rejected
- **Automatically approve / review**
  If the requester is also a role holder of a role that appears in the request flow, the request is automatically approved / reviewed.
- **Comment / description required**
  - Yes: a description must be entered when submitting a request, since otherwise the request cannot be saved (error message in the form of a red exclamation mark)
  - No: entering the description is optional
- **Form type**
  Here you select the form type: Time correction, Absence, Follow-up absence reason, Permission(s).
  - **Time correction**
    This form allows a process to be configured so that the time correction can be mapped. The form is used to book intraday absences. For example, when mapping the time correction, select **Time correction** as the form and ***Present, Business trip, Official errand*** as the error reason. The process flow must be adapted to the company.
  - **Absence**
    This form allows a process to be configured so that, for example, special leave or vacation can be mapped. The form is thus used to book full-day absences. Special leave is configured by selecting ***Absence*** as the form. The process flow must be adapted to the company in each case (e.g., forwarding to the department head and the HR department, decision maker: supervisor or HR department). Select ***Special leave*** as the error reason. If you have defined error reasons that are identical in flow and form, you could name the item more generally and combine them into one item (e.g., special leave, spa treatment, ...). The process definition for ***vacation*** is done in the same way as for special leave, except that vacation must be selected as the error reason. The process flow will also differ from that of special leave, so similar absences such as vacation could be combined.
  - **Follow-up error reason**
    This form allows a process to be configured so that a sick-leave notification by a colleague can be mapped. This example would have to be configured so that ***Follow-up error reason*** is selected as the form and ***Sick with continued pay*** or ***Sick without continued pay*** as the error reason. The

process flow in this example would be that colleagues and the HR department are entered, with the colleague entered as decision maker. Through this process, a colleague could report an employee of their department as sick, and the HR department and the supervisor would be notified.

- **Permission** : This form allows a process to be configured so that, for example, the overtime permission can be mapped. Select ***Permission*** as the form and, in the ***Permissions*** field, check the options that should be available for selection (e.g., work outside core hours, overtime). The process flow must be adapted to the company.

Workflow Steps

The workflow steps map the process flow of a request.

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**
  For the name, you select the role. The role at the first position is the first one in the process flow.
- **Action**
  Selection of the action Approve or Review
- **Editable**
  Yes / No: This parameter determines whether a form becomes editable (the processing instance can open the form and, if necessary, make changes) or not.
- **Abort process immediately on rejection**
  Yes / No: with "Yes", on rejection the process is not forwarded to the next instance but aborted. With "No", the request still goes to the next decision maker even if it has already been rejected (info, review).
- **Automatically approve / review**
  This parameter is particularly relevant when processes with several process levels are used and a role holder may appear several times in the process flow. If the parameter is activated, the first decision is automatically entered by the system each time the role holder is up again in the process flow. If the parameter is deactivated, the role holder must make a decision every time they are up in the process flow.
- **Selection of role holder at process start**
- **Move up or down**
  The central or decentral role at the first position is the first person in the process flow. Using the arrow keys, you can move a role further forward or backward in the process flow.
- **Delete**
  Existing workflow steps can be deleted by activating the check box located at the far right of the corresponding row.
- **Escalation**

Error Reasons

On the **Error Reasons tab**, new error reasons can be added; for existing error reasons, the order can be changed, or they can be deleted.

To add a new error reason, click the "Add" button and select an error reason from the predefined selection. Clicking "**Save**" (further editing possible) or "**Save & Close**" (the form is closed, further editing is possible only after reopening) creates the new error reason.

The order of the error reasons can be changed with the up / down arrow keys.

To delete an error reason from the list, activate the check box in the corresponding error reason row, then click the "Delete" button.

Settings

On this tab, the following settings can be made that affect the newly created or selected process:

Allow in the future
This parameter determines whether the process is intended for the future or for the past.

- **Yes:** Corrections for the future are possible
- **No**: Corrections can only be requested for the past

Type
Corrections can be made according to the following principles: **Overwrite** or **Fill**.

- **Overwrite**
  New booking intervals take precedence over existing intervals. In case of overlap, the existing intervals are deleted or shortened. The following graphic illustrates this principle. It shows existing booking intervals of a day that are corrected by a subsequent booking.

- **Fill**
  New booking intervals are weaker than existing intervals. In case of overlap, the existing intervals are not changed; the new booking interval fills gaps between existing bookings. The following graphic illustrates this principle. It shows existing booking intervals of a day that are corrected by a subsequent binding.

Valid time periods
This parameter can restrict a correction to a certain time frame. Corrections that start and/or end outside the frame, or that lie entirely outside the frame, are prevented:

- **Always,**
- **within/outside core time,**
- **within/outside normal working time**.

With these values, the corresponding time frames from the daily program that were defined **in the Time & Attendance system** can be adopted.

Number of intervals to be entered
This parameter defines the number of possible booking lines per time correction (selection 1-10: if 4 is selected, up to 4 booking intervals can be entered and approved in one step)**.**

Daily Permissions

Here, a daily permission can be set at the same time as the correction.

- **Description text**: can be chosen freely
- **Name**: Name of the permission (e.g., twbue -> overtime permission)
- **Value**: Value to be set (e.g., 1 or 0)

Mail

Entry of the notification that should appear in the email (e.g., You have a request to process...)

Help

Entry of the help text.

Further Steps After Process Creation - Linking to Process Reference

Newly created processes must be linked to actions so that they can be integrated into the menu tree.

- Menu item **Actions > New Action**
- Action type "**Process reference**" (preselected automatically)
- Name - e.g., Absence or Account correction
- Heading: optional
- Save
- Server confirmation "Action was saved successfully" > the action is not executable until a process definition has been selected

Settings tab

- Description
- Action folder
- Image collection
- Image
  Selection of the icon to be displayed in the menu tree
- **ProcessDef ID**
  Selection of the process definition; for the action "Account correction", select Kontokorrektur $Kontokorrektur, etc.
- Inherit permission to the following action

Permissions tab

- Execution allowed for everyone
  Clicking this allows everyone to execute the action
- Type
  Client, group, person, role permission
- Executor
  e.g., for a client permission, selection of the client (execution allowed for all employees of the client)
- Viewing permission
  Selection of the viewing permission (own person, org unit, ...)
- Valid from - to

Text Modules tab

- Selection of the language (German, English, ...)

Then "Save" or "Save & Close"; afterward the action can be assigned in the menu tree.

Integrating the Process Reference in the Menu Tree

To integrate a process reference in the menu tree, which makes it visible to the user, proceed as follows:

- Menu & Actions > Menu tree
- Click the folder containing requests; if necessary, a new folder can be created > it serves as the heading in the menu tree
- Desired folder > right-click > Add action link
- Search for and select the action link (the process reference)
- If necessary, change the order (up/down, to the beginning/to the end)
- Click Clear menu cache