naturalhr
TRANSFORMING BUSINESS

Workflows - User Guide

Contents

Workflow concepts

Within Natural HR we have default workflows built in for all actions which require approval such as adding timeoff, training, expenses, mileage, timesheets and so on.

These standard workflows generate notification emails to employees, managers and approvers as well as sending reminder emails should a request 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 two distinct types:

1) Approval – a workflow for anything which requires approval such as a timeoff request, salary increase and so on

2) Tasks – a checklist which can be used for any process which requires actions to be completed or information to be checked

Adding a workflow

Workflows are accessed via Admin/HR/Workflows/Workflows (https://www.naturalhr.net/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.

The category column will show if the workflow is a task or approval. Departments and sites allows you to have different workflows for different locations and departments whilst Steps shows the number of steps currently in the workflow.

The actions column allows you to modify the name etc. of the workflow, access the workflow builder and delete the workflow should that become necessary.

When you add a workflow, you need to enter a name and choose any department and site permissions as appropriate. Additionally, you need to choose the category and type of workflow.

The choices are:

Approval	Task
Allowance change	Onboarding
Expenses	Offboarding
Job change	Recruitment
Mileage	Task
Salary change	
Timeoff	
Timesheets	
Training	

When you have entered these and clicked Submit, you will then be automatically redirected to the Workflow builder for your newly created workflow. Alternatively, you can access the builder for any workflow from the workflow listing screen by clicking the builder icon in the actions column.

Workflow builder

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

To create a step just click on Add step 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 or task workflow.

If the workflow is an approval workflow then the screen will look like the below – note the only option is the choose the recipient for the approval request.

If the workflow is a task workflow then the screen will look like the below – note the Type option which contains all the different options for the task, each of which will then generate additional fields depending on the choice.

Reordering workflow steps

When you have created a series of workflow steps you can change the order of them by clicking on the number in the first column and dragging the step to the place you wish it to be displayed.

Please note: if you are using trigger options such as last action then this will have a fundamental impact on the ordering of the actual workflow.

Manager approval

Order	Type	Name	Assignee	When	Actions
1	Approval	Manager approval	Employee's manager	On Last action	✎ ⊗
3	Approval	Finance approval	Finance mailbox	On Last action	✎ ⊗
2	Approval	Director approval	Employee's manager's manager	On Last action	✎ ⊗

Showing 1 to 3 of 3 entries   Previous 1 Next

Add step   Cancel

For example, in the above workflow the default ordering was:

1) Manager
2) Manager's manager
3) Finance

By dragging Finance into second place between manager and manager's manager this would change the approval ordering to:

1) Manager
2) Finance
3) Manager's manager

Common workflow builder options

When you add a workflow step there are some common fields which apply to most of the options – these are predominantly time based fields which control when you want the action to happen and how to deal with escalation.

For example, in the above, where we are checking for Personal details we have both "When" and "Escalation path" options.

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 so if you want something to happen on a specific trigger point then 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 either within Natural HR or the workflow itself at which you wish to trigger the workflow. The valid options for Trigger point are:
    a. Start date
    b. Leave date
    c. Contract end date
    d. Resignation date
    e. Last working day
    f. Probationary end date
    g. Birthday
    h. Submission date
    i. Creation date
    j. Last workflow action
    k. Start of current holiday year
    l. Start of current financial year
    m. None

Escalation path

The escalation path is used to control what you want to happen should the required task not take place by the "When" date created above. Similar to "When" it specifies a number and then a period and finally an 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 assignees' manager
3) Escalate to approver – this will send the original email to the assignees' approver
4) Escalate to HR mailbox – this will send the original email to the HR mailbox
5) Escalate to Finance mailbox – this will send the original email to the finance mailbox
6) Escalate to Training mailbox – this will send the original email to the training mailbox
7) Approve – this will, in effect, bypass this step and mark as completed
8) Trigger workflow – this will give the option of triggering another workflow should the escalation process required be more complex than simply sending a reminder or escalating to the above-named people.

The logic behind both "When" and "Escalation path" is best demonstrated with an example:

In this example, the action should be checked for 1 week after the employee start date – if it is then then not completed 3 days after that a reminder will be sent, after 5 days the task will be escalated to the employee's manager and after 7 days, the action will be escalated to HR.

Up to 5 escalation options for one workflow step can be entered.

Approval workflow options

When adding an approval workflow, your main choice (other than "When" and "Escalation path" above) are to choose who the approval request should go to and the content of the notification email which is sent to them.

Sending an email

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

1) Employee – the employee who submitted the request
2) Candidate – the candidate in the recruitment workflow
3) Employee's manager – the employee manager
4) Employee's approver – the employee approver (may be the same person as the manager)
5) Employee's manager's manager – the employees second level manager i.e. their manager's manager
6) Hiring manager – the hiring manager in the recruitment workflow
7) HR mailbox – the email address defined in settings for HR mailbox
8) Finance mailbox – the email address defined in settings for finance mailbox
9) Training mailbox – the email address defined in settings for training mailbox

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

If you want to use system fields in the email subject or content you can use the following. Please note: 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.

As well as entering text etc, you can also use "system fields" which will change according to the request. These system fields are below – as per the table, you should enter these with square brackets around them and, when the email is sent, this 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] timeoff request" for an employee called John Smith then then email would display "John Smith timeoff request".

[[employee_system_id]	[candidate_first_name]	[timeoff_type]	[current_salary]
[employee_first_name]	[candidate_sur_name]	[timeoff_start_date]	[new_salary]
[employee_sur_name]	[candidate_email]	[timeoff_end_date]	[current_hours_per_week]
[employee_works_id]	[candidate_telephone]	[timeoff_duration]	[new_hours_per_week]
[employee_address]	[candidate_role_applied_for]	[training_name]	[current_working_days]
[employee_address2]	[candidate_apply_date]	[training_location]	[new_working_days]
[employee_town]	[candidate_stage]	[training_start_date]	[employee_current_job_title]
[employee_county]	[candidate_available_date]	[training_end_date]	[employee_current_job_status]
[employee_postcode]		[training_duration]	[employee_current_office_name]
[employee_country]		[expenses_name]	[employee_current_department]
[employee_work_email]		[expenses_total]	[employee_current_cost_centre]
[employee_work_telephone]		[expenses_date]	[current_manager_first_name]
[employee_start_date]		[mileage_name]	[current_manager_sur_name]
[employee_leave_date]		[mileage_total]	[current_manager_work_email]
[employee_resignation_date]		[mileage_date]	[employee_new_job_title]
[employee_last_working_day]		[timesheets_name]	[employee_new_job_status]
[employee_contract_end_date]		[timesheets_date]	[employee_new_office_name]
[employee_dob]		[requisition_reason]	[employee_new_department]
[employee_birthday]		[requisition_job_title]	[employee_new_cost_centre]
[employee_ni]		[requisition_department]	[new_manager_first_name]
[employee_probation_date]		[requisition_job_status]	[new_manager_sur_name]
[employee_login_name]		[requisition_location]	[new_manager_work_email]
[employee_new_password]		[requisition_salary]	[effective_date]
		[requisition_hiring_manager]	
		[requisition_start_date]	
		[request_status]	

All of the above fields can be used in both the subject and body of the email.

Please note: 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.

Task workflow options

When using task workflows, there are many more options than for approval workflows. These options can be grouped into three main sections:

1) Require an action
2) Check for entered data
3) Check for other content

Require an action

Within require an action you can choose to:

1) Assign a task to someone
2) Send email to specified recipient – this is where you choose who to send the email to from a list and we lookup the value of that email for the recipient from our system
3) Send email to (external) email address – this is where you enter an actual email address such as internalsupport@company.com
4) Ask a yes/no question

In the case of all of the above they involve email creation as per above Sending an email step. The main difference is that assign a task and Yes/No is sent to a named user whereas "Send email to (external) email address" is sent to an actual email address which could be external from your organisation.

A common use case for "Send email to (external) email address" might be to send email to your IT helpdesk email ticketing system asking them to procure hardware or setup accounts for a new hire. You could also use Assign a task to do the same thing but it would require choosing an individual from the list and should that individual leave it would then impact the integrity of the workflow.

Additionally, assign a task will then require the assignee to login and mark the task as having been completed.

The final option is a yes no question – in this instance the assignee will be required to click Yes or No depending on the their decision based on the question asked. If they choose "Yes" then this step gets marked as completed and the next step will be initiated.

If they choose No, this will also cause something to happen but you can choose what that something is.
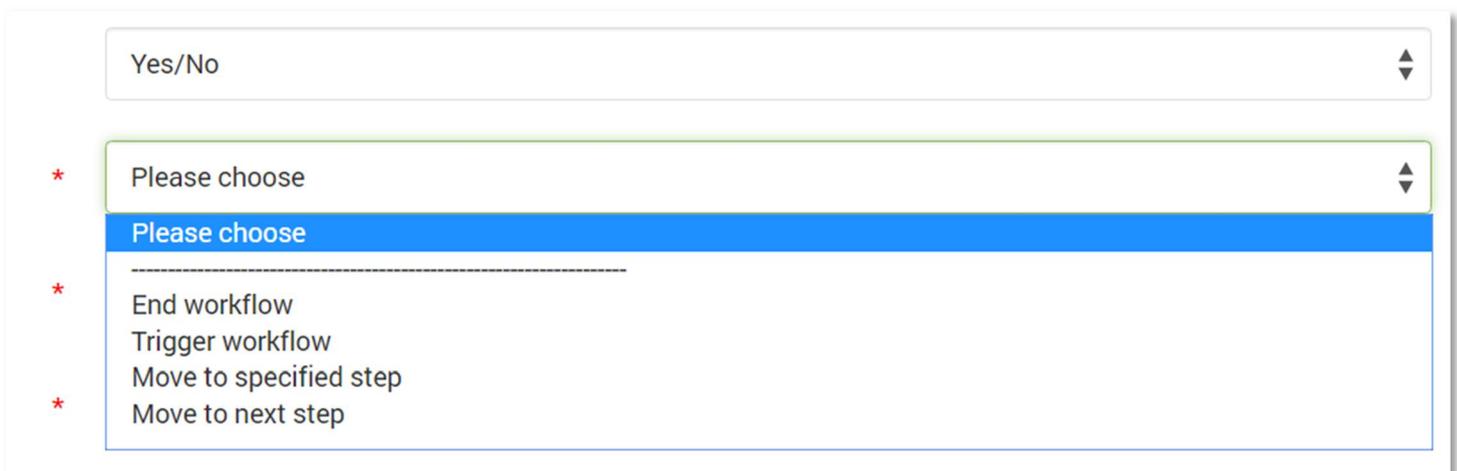
The four options under "Implication of no" are:

1) End workflow – the workflow will be exited upon clicking No
2) Trigger workflow – clicking No will trigger another workflow which will be embedded under this step
3) Move to specified step – this will allow you to choose which step you wish to move to upon clicking No. This is typically used to create a loop whereby the workflow will keep going back to a prior step until such times as the action is completed correctly.
4) Move to next step – this is used for instances where No is actually the "correct" answer for certain questions.

Check for entered data

This step will automatically check the system to check for the existence of data within the employee file namely personal details (address and so on), bank details and emergency contact information.

In most case's we would recommend using this step in conjunction with another step – for example, assign a task to the employee to ensure they have entered their bank details within 7 days of starting. You could then use this check step to check, 10 days for example after their start date, that the data has been entered.

Check for other content

Similar to check of entered data, this option group checks for the existence or specific records in the system – namely training records and mandatory documents.

In the case of training records, we can only check for training which is listed in the Training library and will be unable to check for the existence of any adhoc training or training which is not in the library.

Assigning a workflow to an employee or candidate

Once you have created workflows you need to assign them to an employee or candidate. You only need do this for task workflows – approval workflows will be automatically assigned when the employee submits the relevant request.

Publish a workflow to multiple employees

To assign workflows to multiple employees, entire departments, site locations, job roles or manager's teams. You will need to go to the list of workflows (Via administration > HR > Workflows > Workflows) and select the publish icon beneath "Actions".

You will then be asked to select either "Employees" or "Metadata".

Employees – Checkboxes will be displayed for each of the employees within the company; simply select all of the employees whom you would like to start this workflow for.

Metadata – Select particular departments, site locations, job roles, manager teams which will receive this workflow.

Please note: Using the "Metadata" option will ensure that **all employees** who are assigned to the specific site, role, team or department will receive this workflow.

Assign a workflow to an individual

To assign a workflow to an employee or candidate, go to their file and click on Workflows – this will show you all the current task workflows for this individual.

Workflows for Aimee Hancock

Workflow name	Date started	Status	Progress	Actions
Sales leavers process	10/02/2017	IN PROGRESS	0%	🔍
Personal details check	17/01/2017	COMPLETED	100%	🔍
Personal details check	10/02/2017	COMPLETED	100%	🔍
Onboarding checklist	16/01/2017	IN PROGRESS	45.45%	🔍
Onboarding checklist	10/02/2017	IN PROGRESS	0%	🔍
Embedded workflow	10/02/2017	IN PROGRESS	0%	🔍
Candidate disclosure	10/02/2017	IN PROGRESS	14.29%	🔍
Candidate disclosure	10/02/2017	IN PROGRESS	14.29%	🔍

Showing 1 to 8 of 8 entries

Previous 1 Next

Start new workflow   Cancel

In the above list you can see the workflows, when they were started, their current status (Completed or In progress) and their current percentage progress.

To start a new workflow, click on Start new workflow at the bottom left then on the next screen choose the relevant workflow from the dropdown and click Submit – you will then get a confirmation message and a button for View workflow will appear next to Submit.

Add employee workflow

✓ Employee workflow added   ×

Employee	Aimee Hancock (Works ID: G7LQE7)
Workflow *	Candidate not employable - Disclosure issues

Submit   View workflow   Cancel

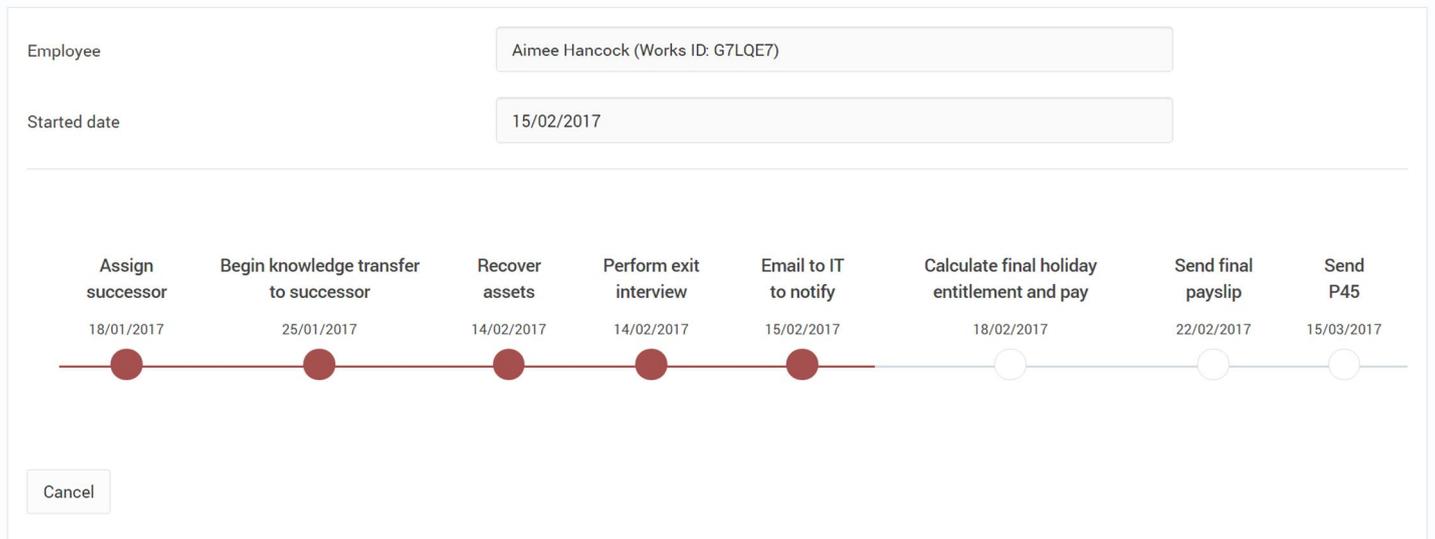© 2010 - 2017 Natural HR Limited

Viewing 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 file and under Workflows click the view icon next to the workflow in question.

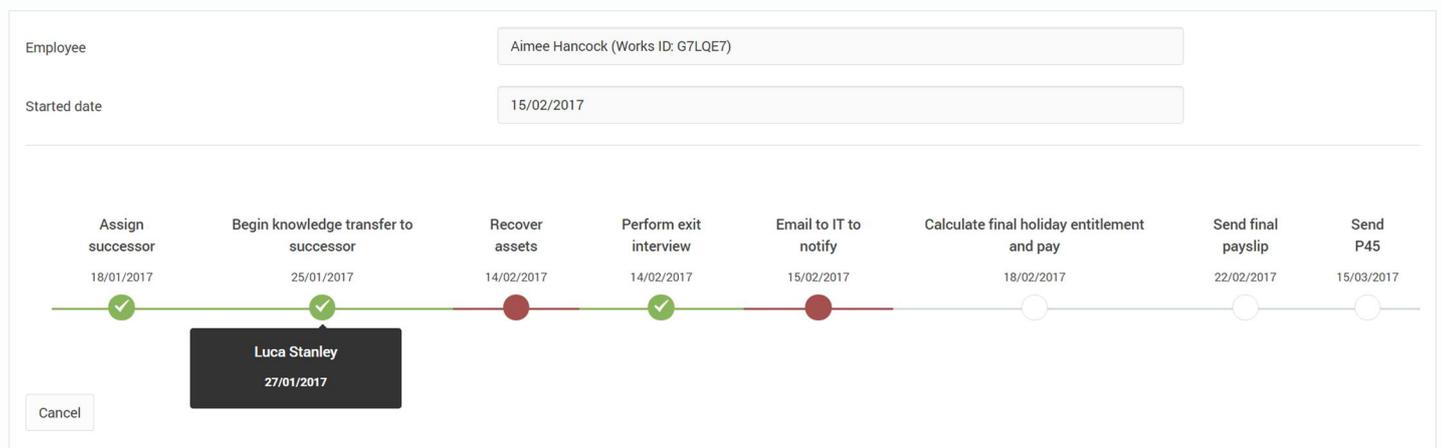This will then show you each step in the workflow and will show you visually the progress.

In the above, there are 8 steps – of these 8 steps, 5 are overdue and have not yet been actioned (marked in RED) whilst the other 3 are not yet due hence they are shown as white.

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

Action a workflow task

When a task is assigned to an employee, they will get the email which was created as part of the workflow step creation. Additionally, when they login they will also see a notice on their home screen highlighting the workflow task.

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/No for a Yes/No assign.

Workflow timeframes

When a task is created there are a number of options for trigger point and so on which will impact when things happen.

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

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

For example, you set step 1 to do something 1 day after the employee start date – this will only trigger during an over night batch process for workflows 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.