

How to add Additional Leave Application Overflow:

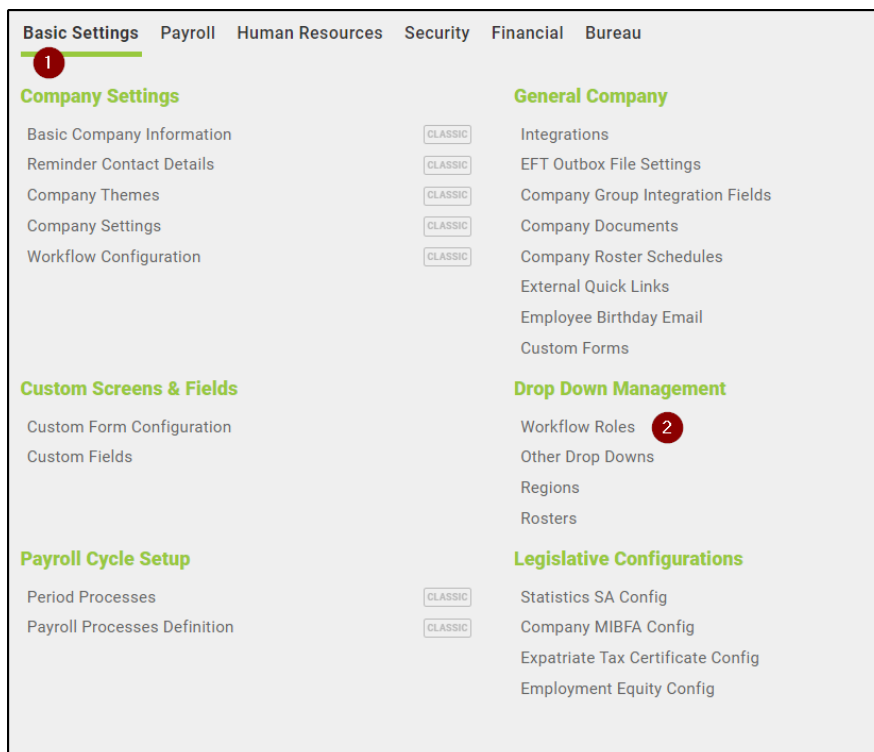
The Company Workflow Setup Screen allows you to create rules for workflow items to move through a defined number of approval steps. Examples of workflow items are Claim Components, Employee Requests and Leave Applications. These workflow items need to be set-up before the workflow path can be created. Once the workflow path has been created, the workflow item is submitted via the Employee Self Service Portal.

Workflow roles may be created and used to accommodate exceptions in workflow paths.

For example, all applications go directly to the line manager. In this case we would like it first to go to the deputy principal (Judith) before going to the direct line manager (Anton).

1. Create workflow roles for Judith and Anton to define them in the workflow steps.

Navigate to Config > Basic Settings > Drop Down Management > Workflow Roles.



Thereafter you may setup the workflow roles as seen in the example below.

Judith's workflow role:

Config / Basic Settings / Drop Down Management Audit

Workflow Roles

+ Workflow Role

Description Code ↑

Q Q

Description: * Code: *

First Approver 03

Save Cancel

Anton's workflow role:

Config / Basic Settings / Drop Down Management Audit

Workflow Roles

+ Workflow Role

Description Code ↑

Q Q

Description: * Code: *

Second Approver 04

Save Cancel

2. Assign the employees to their workflow roles on the position screen.

Navigate to the employee > Basic Information > Position.

Judith:

JK

Monthly

JUDITH

- Basic Information 2
- Basic Profile
- Tax Profile
- Position 3
- Banking Details
- Disciplinary Record CLASSIC
- Incident Management CLASSIC
- Dependants
- Attachments
- Asset Register
- Custom Forms
- Payroll Processing
- Payroll Results

Default grade: Principal/Principal / Deputy Head - Academic | Override Grade: Deputy Principal / Deputy Head - Ac. | Directly reports to person: SHANE BRORSON/Deputy

Additional

Administrative level: Professionally qualified experienced specialist and management | Employment status: Permanent | Remarks: Comments

Directly reports to position: | Override directly reports to position: Click to search...

Is this a promotion?:

Workflow role: First Approver 4

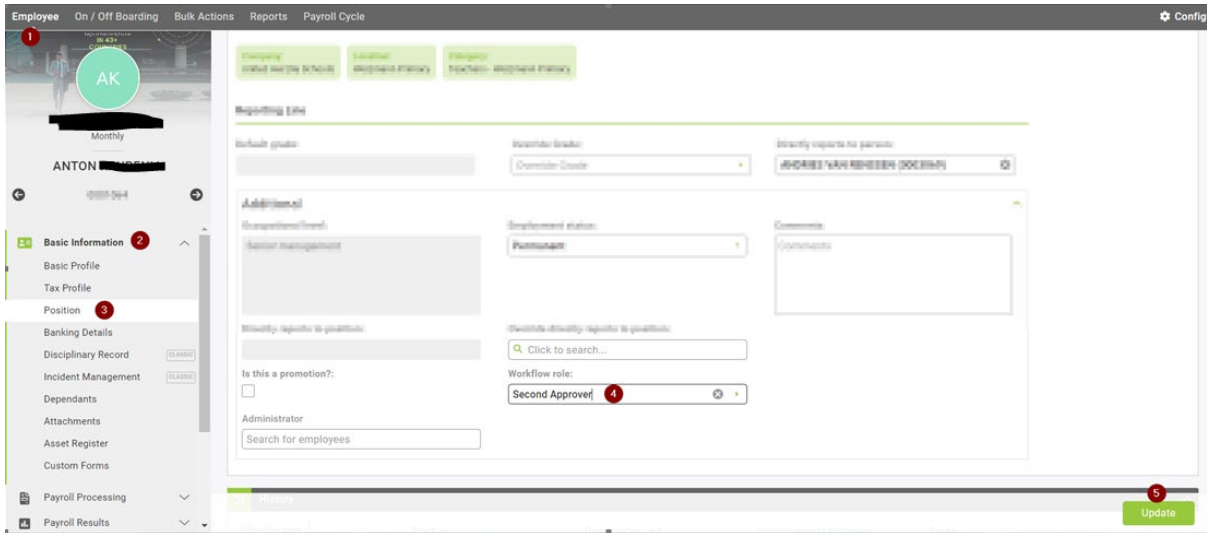
Administrator Search for employees

History

Effective date ↓	Position	Organisation unit	Directly reports to person	Grade
2022/12/01	Deputy Principal/Head Admin Maths	Teachers - High School	SHANE BRORSON	PS4

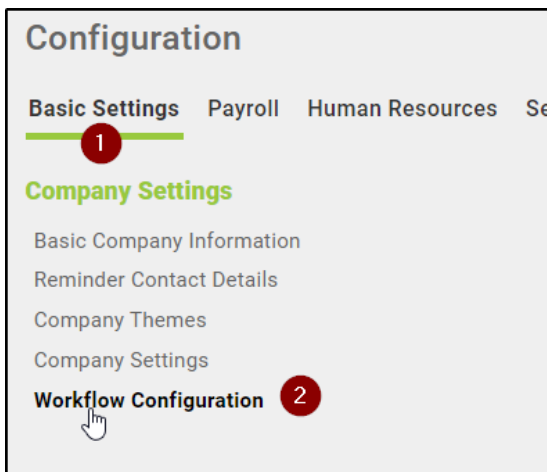
5 Update

Anton:



3. Create the workflow path for leave applications to flow from Judith > Anton.

Navigate to Config > Basic Settings > Company Settings > Workflow Configuration.



You may create the workflow to flow from the first step approver (Judith) > second approver (Anton).

Company WorkFlow Setup

This environment is not a live environment, it is a backup from 2023/03/12

[Click here to view audit trail](#)

Details

workflow item: Leave

leave type: --All Leave Types--

based on (brackets reflect priority order if the same workflow item is configured for multiple scenarios):

Workflow Role (1) [Selected]

Region (2)

Security Role (3)

workflow role: Workflow staff

number of steps required: 3

Step Name	On Approval, Send To	On Rejection, Send To
1. Employee Initiate	A WorkFlow Role [Redacted] - Test - First Approver	
2. Manager Approval	A WorkFlow Role [Redacted] - Test - Second Approver	Reject Workflow
3. Commit	Commit	Reject Workflow

Delete Save

3. Activate the setting to utilize the advanced leave workflow.

Navigate to Config > Basic Settings > Company Settings > Company Settings.

Workflow

▶ Default date for Pay Rate entry with relation to the increases workflow (yyyy/mm/dd).	<input type="text"/>	<input type="checkbox"/>
▶ Do not display Interim runs as an option on employee claims screen for employee self service users.	<input type="text"/>	<input type="checkbox"/>
▶ Escalate claims in employee inboxes that are older than the number of days specified here.	<input type="text"/>	<input type="checkbox"/>
▶ Escalate leave applications in employee inboxes that are older than the number of days specified here.	<input type="text"/>	<input type="checkbox"/>
▶ Hide the amount input option on the increase workflow screen.	<input type="text"/>	<input type="checkbox"/>
▶ Hide the template selection option on the increase workflow screen.	<input type="text"/>	<input type="checkbox"/>
▶ If advanced leave workflow rules are being utilised, enable this option on the leave approval screen.	<input type="text"/>	<input checked="" type="checkbox"/>

4. When applying for leave, the leave application will flow from the employee > Judith > to Anton

Kindly see below example that was done.

Search for employees

SIMONE [Redacted] has applied for 7 hours annual leave

"Test Application"

Today: 16 Mar 2023

Attachment

Date	Name	Status
No data		

Cancel Application

Workflow

Action Date	Step	Users	Status
2023/03/16, 8:53 am	Employee Initiate	[SV] SIMONE, V	Submitted
	Manager Approval	[JK] JUDITH, K	Waiting
	Commit	[AK] ANTON, K	Waiting

Kindly note, that the leave workflow will be applicable to all employees on the payroll.



Tips

- Workflow paths can be created per Leave Type or Leave Scheme.
- Workflow paths need to be configured for each Employee Request and Claim created.
- The last step of a workflow path should always be Commit.