

Workflow Guide

Bringing three basic processes to life

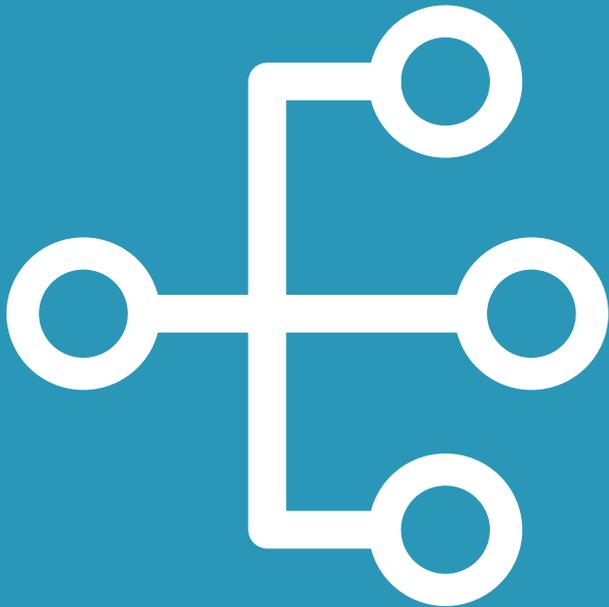


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1. Continuous Workflow: Employee Birthday

Create a simple notification for a manager five days before an employee's birthday, reminding them to purchase a cake and card.



Introduction:

Throughout this document, we'll be building three simple workflows across the continuous, approval and task workflow types - we encourage you to follow this process in your Natural HR environment, ensuring that you've set the workflow to "Active - No" within your workflow settings.

Setting up the skeleton:

Initially, we'll need to set up the workflow skeleton by selecting the "ADD" button at the bottom of the workflow screen 'Administration - HR - Workflows'.

Once you reach the workflows screen begin applying the following options:

| | | |
|---|---|-------------------|
| Name | • | Birthday Workflow |
| Category | • | Continuous |
| Type | • | Trigger date |
| Trigger against leavers/archived employees? | • | No |

What do these rules mean?

- The workflow is continuous, so it will be triggering during our overnight batch process looking for a certain condition.
- The condition is the Trigger date, which means it is seeking the trigger condition of the first workflow step.
- The workflow is not triggering against leavers meaning it will only trigger for current employees.

Once these rules have been set, choose any relevant permissions using the tick boxes which will appear below these options. It's important to remember to set the workflow Active Option to "No" to prevent the workflow from being triggered against your employee records.

After this has been set, press the "submit" button to go into the step builder - once in the step builder, you can use the "Add" button in the bottom left to start building your first step.

Defining the steps:

This single step workflow will have an end goal of sending the appropriate manager the desired notification “Send Email To Specified Recipient”:

| | |
|--------------|------------------------------------|
| Name | • Birthday Notification to Manager |
| Description | |
| Type | Send email to specified recipient |
| Recipient(s) | ? • Employee's manager x |

What do these rules mean?

- The workflow step will generate an email notification
- This email notification will go to the employee’s manager

To personalise the email content, simply edit the subject line and content box similar to the example below:

[employee_name]'s birthday is In 5 days time

I **B** *I* U

Hello [current_manager_first_name],

[employee_name] has their birthday coming up soon. Please ensure that you have got them a card prepared.

Thank you
The HR Team



Any text which is surrounded by brackets is known as a ‘system tag’, these tags will populate information into the email from the employee record. The tick boxes can be left blank as the email does not need to be sent as plain text and does not contain any sensitive data.

As this workflow is based around a trigger date as defined in the workflow skeleton, we can now set up the trigger rule using the “When Should This Happen” statement as below:

| | | | |
|---|--|--|----------|
| 5 | Day(s)  | Before  | Birthday |
|---|--|--|----------|

2. Approval Workflow: Holiday Approvals

Simplifying your time off process via our two-step approval workflow.

(Requires two individuals)



Setting up the skeleton:

Similar to the previous workflow, we'll need to set up a skeleton using the "ADD" button at the bottom of the workflows home screen 'Administration - HR - Workflows'.

Once you're on the add screen the workflow rules will need to be set up as follows:

| | |
|--------------|-------------------|
| Name | • 2 Step Approval |
| Category | • Approval |
| Type | • Timeoff |
| Timeoff type | Any x |

What do these rules mean?

- The approval workflow will trigger automatically once a request that requires approval has been made.
- Time-off type means the request is looking specifically for time-off approvals.
- "Time-off type any" indicates the workflow will apply to all time-off types. However, you can also set this to a specific time-off type i.e sickness.



Setting up an approval workflow for time off will disable the default process. Ensure that you're covering all types of time off with either single or multiple workflows before setting these live.

Similarly to the Birthday Workflow, you can define your permissions in the same way ensuring you set the active status to "No".

Once the above is set you can select "Submit" to go into the workflow step builder.

Defining the steps:

This particular workflow will be made up of two approval steps. The first approval will be going to the employee's manager whilst the second will be going to the employee's head of department.

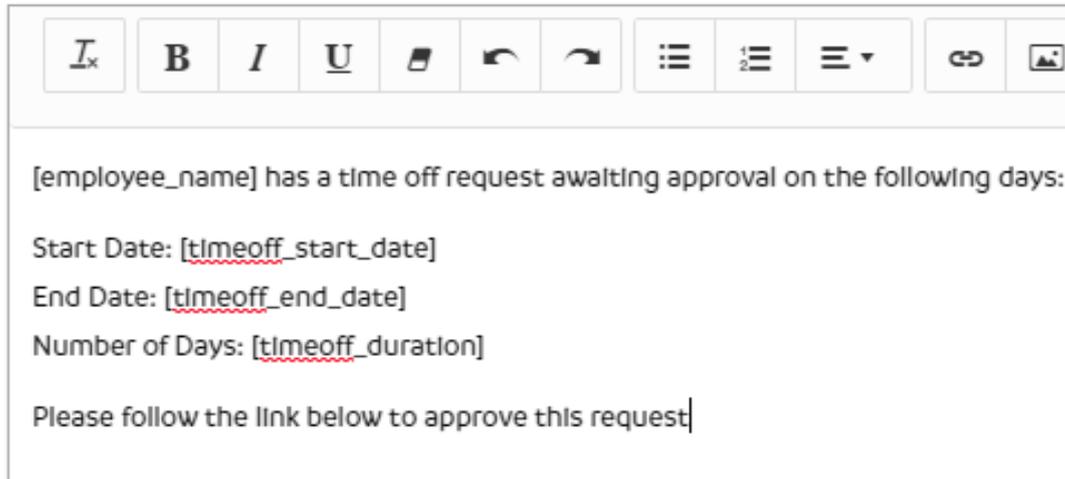
The first step would be set up as followed:

| | |
|---------------------------|--------------------------|
| Notify only? | No |
| Type | Require approval |
| Any recipient can approve | Yes |
| Implication of NO | • End workflow |
| Recipient(s) | • ? Employee's manager x |

What do these rules mean?

- The steps require an action rather than being just a notification.
- The step requires an approval action to be completed.
- Any recipient of the step can make the approval (In this case it is just the employees' manager, however, you could add in multiple recipients here if needed by clicking in the blank space next to the previously added recipient to open a new selection dropdown).
- If the approval is declined the workflow will end.
- The employee's manager will receive the step action.

The email content can be set up in the same way as the birthday notification:



Any tick boxes can be left unticked due to the email not displaying in plain text or sensitive information.

The trigger rule can now be set up with the aim for the email to trigger immediately upon the request being made:



The final option that we've on this screen creates an escalation. You can open the options for this by clicking the escalations options tick box:



This option allows you to escalate any workflow step that has an assigned action. The example below shows that if the request hasn't been actioned in three days, a reminder will be sent to the manager. Please note that you can only have five escalations per step.



You can have up to 5 of these individual escalation steps on each workflow step.

Once this step is complete and you can select “Submit”. Upon pressing submit you’ll be taken to a new workflow step “add page” where you can begin to set up the next stage.

The second step of the workflow is set up in the same way except for the when statement and the recipient. As such you can repeat the above process but instead of selecting “employee’s manager” as the recipient, you’ll select head of the department as shown below:

Recipient(s)



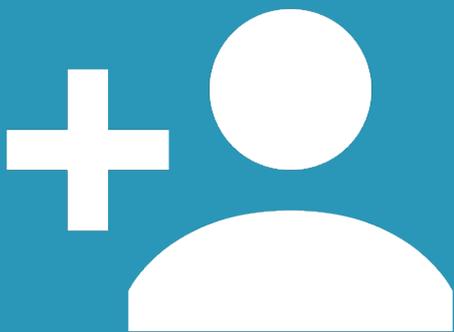
Employee's Head of department x

You’ll also need to define the point at which this goes out to be once the previous step has been completed. As such your “when should this happen” statement will read as below:

| | | | |
|---|-----------|----------|----------------------|
| 0 | Day(s) ▲▼ | After ▲▼ | Last workflow action |
|---|-----------|----------|----------------------|

3. Task Workflow: New Starter Account & Details

Build a simple onboarding process that provides a new hire with key information central to an employee's Natural HR account.



Setting up the skeleton:

As with the other workflows, you'll start the process by clicking "ADD" at the bottom of the workflow screen found by going to "Administration > HR > Workflows"

Once on the workflow edit screen, you'll need to set the rules up as follows:

| | | |
|----------|---|---------------------------|
| Name | • | New Starter Workflow Demo |
| Category | • | Task |
| Type | • | Onboarding |

What do these rules mean?

- The workflow is a manually triggered task which can be published to your users.
- The workflow will be available within the employee add screen as an onboarding process.

Following the same pattern as the previous workflows, you'll need to set this workflow with the relevant permissions and set the active status to "No" to avoid impacting your current users. You can then click "Submit" to then go to the step builder.

Defining the steps:

This particular workflow will be made of four steps - one step will generate the employee account and three identical steps asking an employee to enter their details.

The first step will be set up as follows:

| | |
|-------------|----------------------------------|
| Name | Send account details to Employee |
| Description | |
| Type | Send account email |

What do these rules mean?

- When the workflow is triggered the step will create and generate a password for the user.
- An email notification will then be sent to the employee.

You can then set up the email content in the same way as the previous workflows. It is worthwhile noting that you would need to add the [employee_new_password] field tag into the workflow for the employee to see their new password.

I **B** *I* U

Hello [employee_name],

Welcome to Natural HR our HR platform!

You can log into the system using your work email address by going to naturalhr.net/login.

Your temporary password is: [employee_new_password]

Thank you
The HR Team

An email notification can be set up to be sent out at a specific time. The example below shows the account is created on the employee's first day to assist with the onboarding process.

| | | | |
|---|--------|-------|------------|
| 0 | Day(s) | After | Start date |
|---|--------|-------|------------|

Once these options have been set your first step is complete and you can select submit to add this to the workflow.

The remaining three steps of this workflow all use a similar field type. Firstly, you'll need to define the statement and create the email content. The steps below will show you how to send the notification out upon employee access.

| | |
|--------------|------------------------|
| Type | Employee enter address |
| Recipient(s) | Employee x |

The email content has been filled out to let the employee know they need to enter their details into Natural HR.

I **B** *I* U

Hello [employee_name],

Please log in to Natural HR and enter your personal details.

You can use the link at the bottom of this message to go directly to your personal details page.

Thank you
The HR Team

Once access has been granted we'd want the process to be sent to the employee, so we need to send this out upon the last action being completed.

| | | | |
|---|-----------|----------|----------------------|
| 0 | Day(s) ▲▼ | After ▲▼ | Last workflow action |
|---|-----------|----------|----------------------|

It's important to note that 'last workflow action' steps will trigger when the previous action is fully complete. For example, a completed field being filled in on a form or an assign to step being marked complete. This allows you to create a dependency chain for processes such as approvals where you require a previous step to be completed before the process can continue.

You can then add in any relevant escalations now the step has been completed.

To finish the process you'll need to then set up another two steps in the same way but rather than selecting "employee enter address" as the type, you'll need to select "employee enter bank details" and "employee enter emergency contact details" accordingly.

At which point this workflow is complete and you can set this to active if you want to run this as part of your onboarding process.

Thank You!

**You're on your way to
becoming a Natural HR
workflow expert.**

