

Template Applications – Personnel Action Request

Contents

Introduction	2
Workflow Logic	3
Notable Behaviors.....	4
Installation Instructions	4
Mobile Version.....	8

Template Applications – Personnel Action Request

Introduction

This application consists of two pages to manage personnel action requests. The first page collects details of the requester, employee, and the specific request. The second page contains the approvals.

Request for Personnel Action

HR

STATUS: New Request

Requested By (Name):

Requested By (E-mail):

Department:

Request Date:

07/30/2021

Name of Employee:

Effective Date:

Employee ID:

SSN (Last 4 digits):

Job Code:

Personnel Action

☐ 1: Transfer within department

☐ 7: Suspension

☐ 13: Return from military leave

☐ 2: Transfer to another department

☐ 8: Resignation

☐ 14: Change of name

☐ 3: Demotion

☐ 9: Retirement

☐ 15: Change in salary

☐ 4: Layoff

☐ 10: Separation by death

☐ 16: Other

☐ 5: Dismissal

☐ 11: Expiration of temporary appointment

☐ 6: Leave without pay

☐ 12: Return from leave without pay

Approvals Required:

Items affected by action:

Date from:

Current department:

Current job title:

Current salary:

Current name:

Attach letter to employee:

Attach

Other details:

Explanation and Remarks (Give reason for any action that isn't self-explanatory)

SUBMIT

CLOSE

Request for Personnel Action

HR

STATUS: Department Manager Decision

Current Department Manager Decision

☐ Approved

☐ Returned

Comments:

Name:

Date:

New Department Manager Decision

☐ Approved

☐ Returned

Comments:

Name:

Date:

Head of Finance Decision

☐ Approved

☐ Returned

Comments:

Name:

Date:

Head of Personnel Decision

☐ Approved

☐ Returned

Comments:

Name:

Date:

HR Confirmation

☐ I confirm that the changes have been made.

Name:

Date:

<< REQUEST

SUBMIT

CLOSE

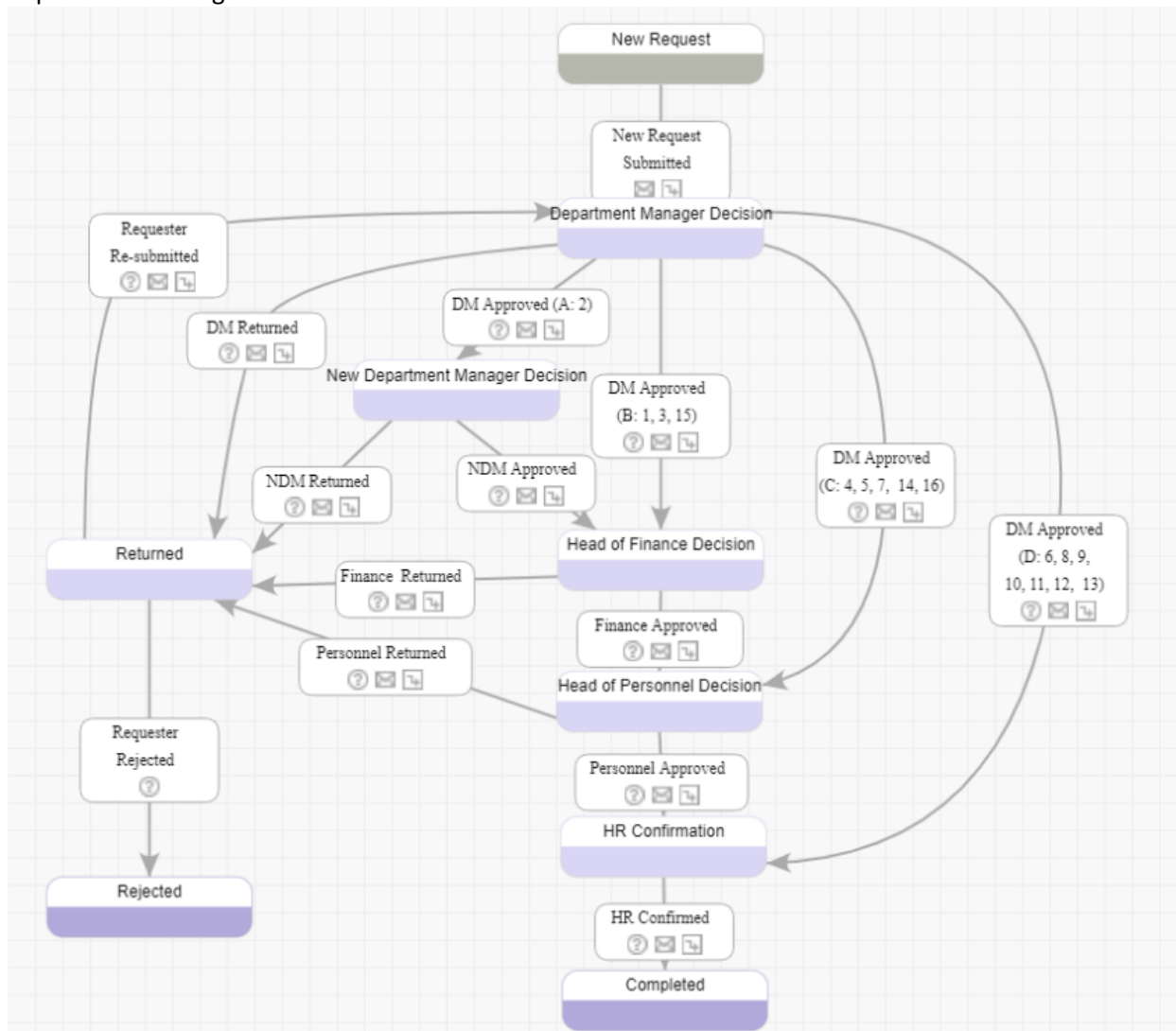
Template Applications – Personnel Action Request

Workflow Logic

All requests will require approval by the department manager, who may also return the request for further information before approval. Once approved, the request moves to various approvers depending on the type of request.

Each approver may return the request for further information, and if this happens, the requester has the option to re-submit with an update or reject and close the request.

If the requester does re-submit the request, then the approval process starts again with the department manager.



Important notifications in this process are recurring after a certain period of working days. Mandatory fields such as approver name or, in the case of returns, the reason for return are included on the workflow pathways.

Template Applications – Personnel Action Request

Notable Behaviors

On the first page, there is a hidden text field, 'txt Set WF Type,' and an adjacent helper field, 'Help Workflow Type,' used to determine the type of workflow that determines which workflow pathway is followed.

The behavior that manages this is attached to the 'Mouse moves over text' but is triggered elsewhere using the Run Behavior command. (See the next comment for more details.)

While managing the workflow type based on the request type, this logic also sets a field that advises which approvals are required for that request.

When the request type is selected in the Personnel Action group, note that the behavior above is first triggered using the Run Behavior command on the group changes event. The rest of the logic in this event manages the supplementary information required below the group; this also depends on the selection made.

So that the correct supplementary fields are displayed when the app opens at a later stage, and the same logic is triggered when the group is shown.

Installation Instructions

The application is initially designed in demonstration mode. All notifications will be sent to the e-mail address entered into the 'Requested by E-mail' field. This will not be suitable for the final application.

A few minor modifications will be required after the application has been imported into your system. In normal circumstances, the e-mail address of the current department manager and the new department manager would be stored in the drop-down objects on the app. Notifications are sent to those e-mail addresses.

Template Applications – Personnel Action Request

The first modification would be to change the two drop-down fields to include the proper departments (Caption). The correct e-mail addresses for the department managers are also included here (Value).

Request for Personnel Action

STATUS:

Requested By (Name): Requested By (E-mail):

Department: Request Date: 07/30/2021

Name of Employee: Effective Date:

Employee ID: SSN (Last 4 digits):

Job Code:

<Set WF Type>

Personnel Action

☐ 1: Transfer within department ☐ 7: Suspension ☐ 13: Return from military leave

☐ 2: Transfer to another department ☐ 8: Resignation ☐ 14: Change of name

☐ 3: Demotion ☐ 9: Retirement ☐ 15: Change in salary

☐ 4: Layoff ☐ 10: Separation by death ☐ 16: Other

☐ 5: Dismissal ☐ 11: Expiration of temporary appointment

☐ 6: Leave without pay ☐ 12: Return from leave without pay

Approvals Required:

Items affected by action:

Date from: Date to:

Current department: New department:

Current job title: New job title:

Current salary: New salary:

Current name: New name:

Attach resignation if more: Status:

Other details:

Explanation and Remarks (Give reason for any action that isn't self-explanatory)

Requester Choice

Properties

Form > 1: Request > Department

Attributes

Name: Department

Behaviors

Drop-Down changes field data
Drop-Down gains focus
Drop-Down loses focus
Drop-Down is clicked
Drop-Down is shown

Settings

Caption	Value	Selected
Marketing	mary@email.com	<input type="checkbox"/>
Sales	stephen@email.com	<input type="checkbox"/>
Finance	farouk@email.com	<input type="checkbox"/>
Purchasing	phillipa@email.com	<input type="checkbox"/>

Settings

Form > 1: Request > New Department

Attributes

Name: New Department

Behaviors

Drop-Down changes field data
Drop-Down gains focus
Drop-Down loses focus
Drop-Down is clicked
Drop-Down is shown

Settings

Caption	Value	Selected
Marketing	mary@email.com	<input type="checkbox"/>
Sales	stephen@email.com	<input type="checkbox"/>
Finance	farouk@email.com	<input type="checkbox"/>
Purchasing	phillipa@email.com	<input type="checkbox"/>

Mandatory

☐ Mandatory Answer


The second modification would be in the workflow properties to re-set the roles to link to those who occupy that role. At the same time as doing this, the other roles can be relinked too.

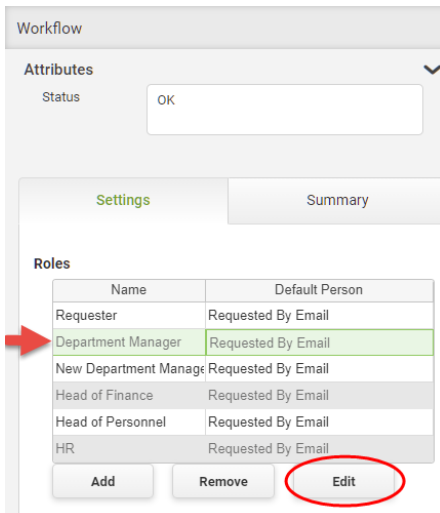
In normal circumstances, the Head of Finance, Head of Personnel, and HR Roles will always be occupied by the same person, so it's not necessary to identify them in the application. Still, these roles can be linked directly to a user in your system or a specific e-mail address. This will need to be done before publishing the application.

Template Applications – Personnel Action Request

The current and new department managers can be linked to the value of the respective department drop-down objects.

To manage this, do the following:

- Open the app in design mode
- Click on the workflow icon 
- The workflow properties should be open in the right-hand panel, but if not, click on the workflow diagram's background (grid area) away from a stage object or pathway.
- Select the Department Manager role in the workflow properties and the 'Roles' table, and click the Edit button.

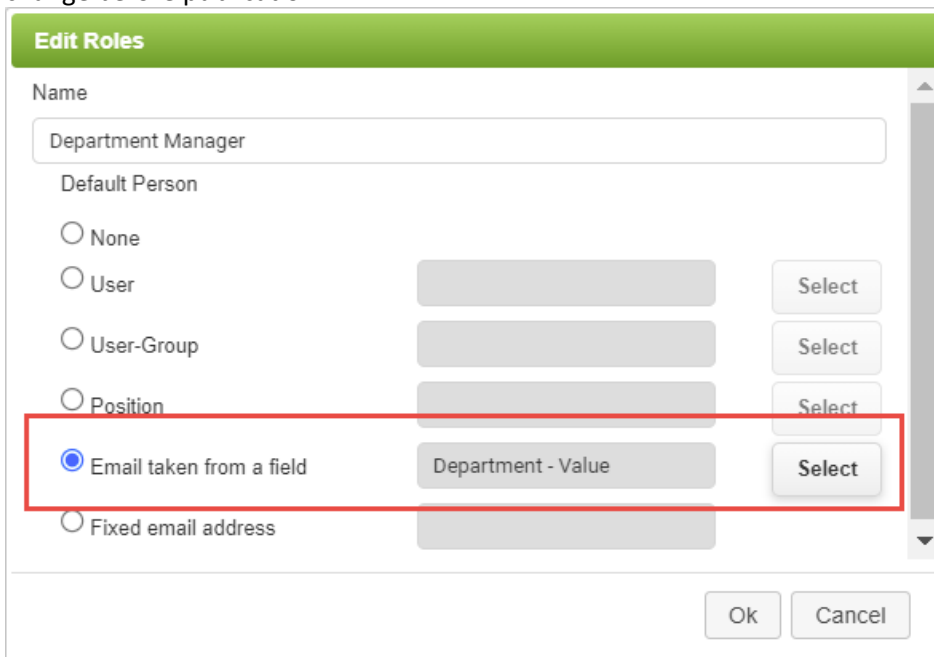


The screenshot shows the 'Workflow' panel with the 'Attributes' section expanded. Below it are 'Settings' and 'Summary' tabs. The 'Roles' section contains a table with the following data:

Name	Default Person
Requester	Requested By Email
Department Manager	Requested By Email
New Department Manager	Requested By Email
Head of Finance	Requested By Email
Head of Personnel	Requested By Email
HR	Requested By Email

Below the table are three buttons: 'Add', 'Remove', and 'Edit'. The 'Edit' button is circled in red. A red arrow points to the 'Department Manager' row in the table.

You will see that the role is currently linked to the 'Requested By E-mail' field, which you must change before publication.



The 'Edit Roles' dialog box is shown. It has a green header bar with the title 'Edit Roles'. Below the header, there is a 'Name' field containing 'Department Manager'. Under 'Default Person', there are several radio button options: 'None', 'User', 'User-Group', 'Position', 'Email taken from a field' (which is selected), and 'Fixed email address'. To the right of these options are input fields and 'Select' buttons. The 'Email taken from a field' option is highlighted with a red box, and its corresponding input field contains 'Department - Value'. At the bottom of the dialog are 'Ok' and 'Cancel' buttons.

Select the Value of the Department drop-down.

Template Applications – Personnel Action Request

Repeat this process for the New Department Manager by selecting the Value of the New Department drop-down.

Edit Roles

Name
New Department Manager

Default Person

☐ None

☐ User

☐ User-Group

☐ Position

☒ Email taken from a field

☐ Fixed email address

The roles can be slightly different for the three other roles: Head of Finance, and Head of Personnel & HR.

Template Applications – Personnel Action Request

Select each role and decide which option to use from the list below.

Edit Roles

Name
Head of Finance

Default Person

☐ None

☐ User **1**

☐ User-Group

☐ Position **2**

☒ Email taken from a field

☐ Fixed email address **3**

1. If your Head of Finance/Head of Personnel/HR has a license in your account (Full, basic, or limited), you can link directly using the User option. Select the 'User' option, click the corresponding Select button, and choose from the user list.
2. Suppose you have set up a position within your system for any of these roles and have selected the appropriately licensed user to occupy that position. In that case, you can link to that position. Select the 'Position' option, click the corresponding Select button, and choose from the list of positions.
3. If neither of the above is possible, you can link to the user's e-mail address. Select the 'Fixed e-mail address' option and enter the e-mail address in the corresponding box. In this scenario, the user doesn't require a license (Full, basic, or limited) in your system.

Click OK when done.

The HR Header graphic is included as a picture in the individual page property settings and can be removed if you prefer to use alternative graphics.

Use the style section in the application properties panel to modify the color and fonts for the main objects and fields.

Mobile Version

This application is enhanced for mobile use.

If you have the mobile version license and want to utilize the feature for this application, please make sure that you check the option to make the Mobile version active after importing the application.