



JT Workflow

6.8

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Overview

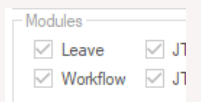
Workflow is a hierarchical notifications function in Jarrison Time, which can be set to apply on Overtime Pre-Authorizations, Overtime Authorizations, Manual Clockings, or Adjustments. This allows for multiple levels of approval to be enforced on e.g. authorized overtimes. For Workflow notifications email SMTP will need to be configured and working.

Any task initiated as part of Workflow needs to be approved within a specified time frame by whomever the task-initiator reports to, in accordance with the configuration requirements, and the Supervisor and User Reports To assignments in the system. Non-completion of the task in time will result in notification being sent to the next level of the hierarchy.

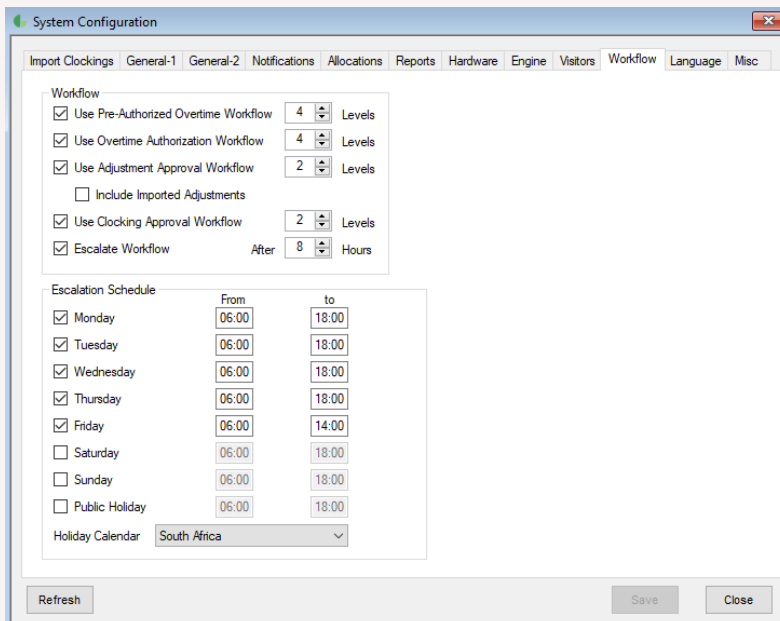
Rejected tasks will revert to their initiator, while approved items will move to the next level (if there is one).

Setup

Begin by ensuring the module is licensed correctly (selected on the **Registration** window).



Then go to 'Setup', 'System Configuration' 'Workflow' tab.



System Configuration

Workflow

- Use Pre-Authorized Overtime Workflow 4 Levels
- Use Overtime Authorization Workflow 4 Levels
- Use Adjustment Approval Workflow 2 Levels
- Include Imported Adjustments
- Use Clocking Approval Workflow 2 Levels
- Escalate Workflow After 8 Hours

Escalation Schedule

	From	to
<input checked="" type="checkbox"/> Monday	06:00	18:00
<input checked="" type="checkbox"/> Tuesday	06:00	18:00
<input checked="" type="checkbox"/> Wednesday	06:00	18:00
<input checked="" type="checkbox"/> Thursday	06:00	18:00
<input checked="" type="checkbox"/> Friday	06:00	14:00
<input type="checkbox"/> Saturday	06:00	18:00
<input type="checkbox"/> Sunday	06:00	18:00
<input type="checkbox"/> Public Holiday	06:00	18:00

Holiday Calendar South Africa

Refresh Save Close

To include an aspect into Workflow, tick its 'Use...Workflow' option and assign the number of levels of approval required. The first level is the task initiator, not an actual approval level. In the image above all aspects are included and any authorized or pre-authorized overtime will require three approvals while adding or removing clockings or adjustments will require one approval.

Any task that enters Workflow should be given attention within eight hours, per the **Escalate Workflow** setting, or it will result in a notification being sent to the user who has not attended their task, and their supervisor.

Note there is also an escalation override setting in **User Profiles** that can be applied on each user account.

Change password at next login
 Logon using Windows User name
 Escalate Workflow After Hours
 Account Locked

The **Escalation Process Schedule** determines when Workflow notifications will be sent. The above configuration will allow for notifications Monday – Friday, between 06h00 and 18h00. A holiday calendar may also be set to align Public Holidays if notifications are required on public holidays as well.

There are also **User Group** options under **View** to determine the control and authority users have in Workflow.

Workflow Administrator
 Reassign Workflow Tasks
 View Pending Clockings
 View Pending Adjustments

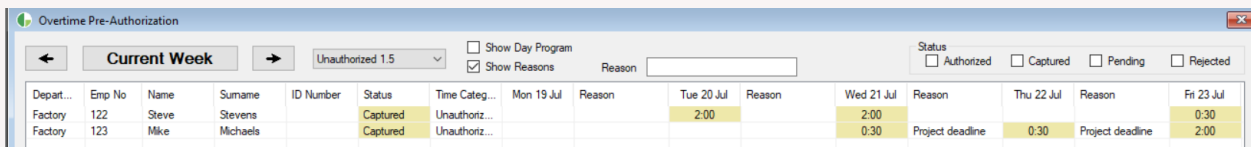
Workflow Administrators can view and reassign all tasks. Reassigning is typically used when a user is not available to complete their tasks.

Once a task has been approved at its last level, it moves out of workflow and is treated in the system as a regular transaction.

Workflow Processing

Changes captured in Workflow aspects appear in orange with a status as “Captured”. The transactions will be marked in a peach/orange colour to distinguish them from fully-processed details that do not require any approval. In the examples that follow the structure is: Robertson reports to Ronalds, who reports to Davies. In other words, Robertson is typically the task initiator.

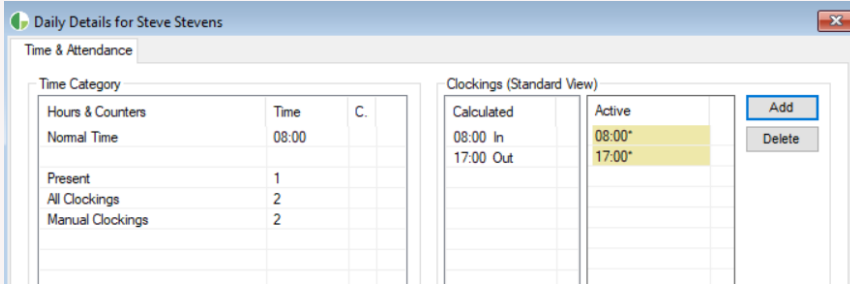
Captured pre-authorization time that still needs to be approved:



Depart...	Emp No	Name	Surname	ID Number	Status	Time Categ...	Mon 19 Jul	Reason	Tue 20 Jul	Reason	Wed 21 Jul	Reason	Thu 22 Jul	Reason	Fri 23 Jul
Factory	122	Steve	Stevens		Captured	Unauthorz...			2:00		2:00				0:30
Factory	123	Mike	Michaels		Captured	Unauthorz...					0:30	Project deadline	0:30	Project deadline	2:00

The view can be filtered according to **Status**, or ordered by clicking a column header.

Captured manual clockings that still need to be approved, as seen in the system:



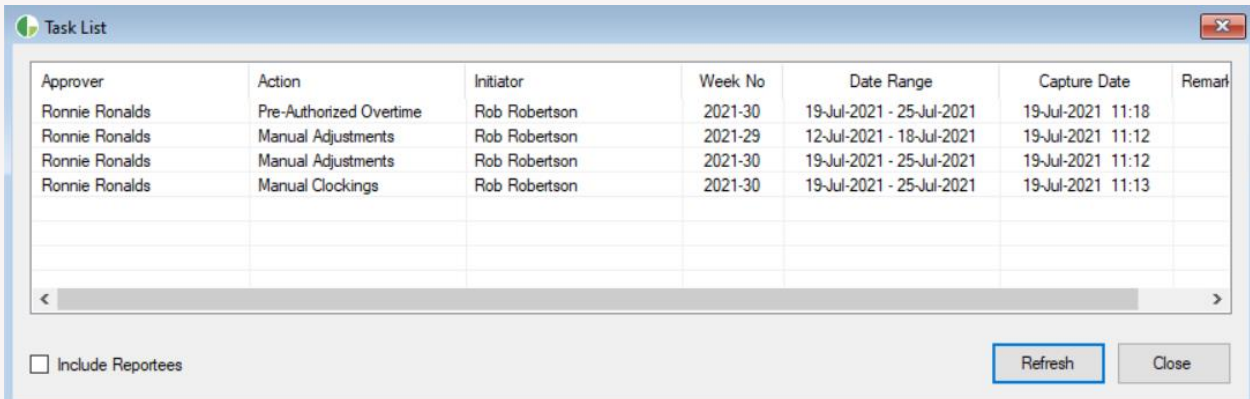
The screenshot shows a window titled "Daily Details for Steve Stevens" with a "Time & Attendance" tab. It contains two tables:

Time Category		
Hours & Counters	Time	C.
Normal Time	08:00	
Present	1	
All Clockings	2	
Manual Clockings	2	

Clockings (Standard View)	
Calculated	Active
08:00 In	08:00*
17:00 Out	17:00*

Buttons: Add, Delete

As soon as a Workflow task is initiated, an entry per user and event type will appear in the **Task List** ('View', 'Task List') of the next level user. (Below there may be multiple transactions for Pre-Authorized, they will be presented in the next screen.) The Approver will need to login and can then double-click on the task, which will open the screen of actual transactions. Below are their screens.



The screenshot shows a window titled "Task List" with a table of tasks:

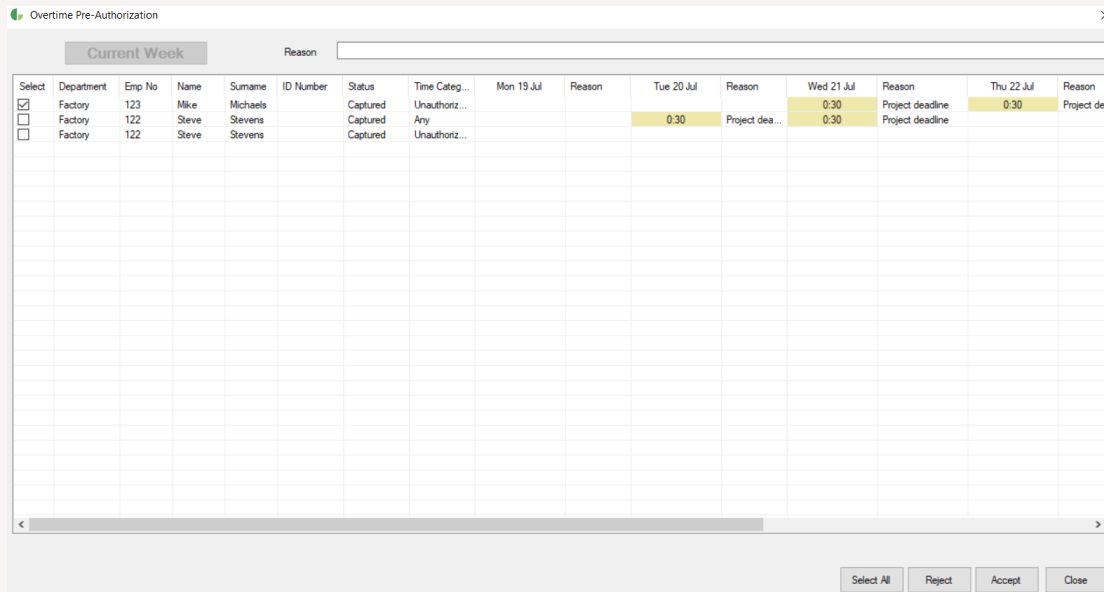
Approver	Action	Initiator	Week No	Date Range	Capture Date	Remark
Ronnie Ronalds	Pre-Authorized Overtime	Rob Robertson	2021-30	19-Jul-2021 - 25-Jul-2021	19-Jul-2021 11:18	
Ronnie Ronalds	Manual Adjustments	Rob Robertson	2021-29	12-Jul-2021 - 18-Jul-2021	19-Jul-2021 11:12	
Ronnie Ronalds	Manual Adjustments	Rob Robertson	2021-30	19-Jul-2021 - 25-Jul-2021	19-Jul-2021 11:12	
Ronnie Ronalds	Manual Clockings	Rob Robertson	2021-30	19-Jul-2021 - 25-Jul-2021	19-Jul-2021 11:13	

Buttons: Refresh, Close

Include Reportees

The '**Include Reportees**' option will include tasks of supervisors below the current user in the Workflow hierarchy.

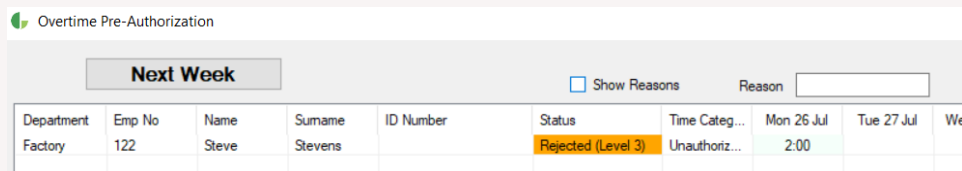
After double-clicking a Pre-Authorized task a window will open to allowing processing:



Current Week								Reason							
Select	Department	Emp No	Name	Surname	ID Number	Status	Time Categ...	Mon 19 Jul	Reason	Tue 20 Jul	Reason	Wed 21 Jul	Reason	Thu 22 Jul	Reason
<input checked="" type="checkbox"/>	Factory	123	Mike	Michaels		Captured	Unauthoriz...			0:30	Project dea...	0:30	Project deadline	0:30	Project de
<input type="checkbox"/>	Factory	122	Steve	Stevens		Captured	Any								
<input type="checkbox"/>	Factory	122	Steve	Stevens		Captured	Unauthoriz...								

From here the user can select rows and choose to **Accept** or **Reject** the transaction. Rejections will require a **Reason** to be entered at the top. If rejected the transaction will return to the initiator's Task List, so they can amend and re-submit or cancel the transaction. Notification will also be emailed.

The number next to Reject (under Status) indicates the number of users above the initiator that the rejection came from i.e. the first row above was rejected by Davies.



Next Week										Reason	
										<input type="checkbox"/> Show Reasons	
Department	Emp No	Name	Surname	ID Number	Status	Time Categ...	Mon 26 Jul	Tue 27 Jul	We		
Factory	122	Steve	Stevens		Rejected (Level 3)	Unauthoriz...	2:00				

If accepted the task will move to the next level of Workflow

When the task is approved by the final user in the Workflow, it moves out of Workflow i.e. becomes a regular transaction.

Pending Approval Workflow transactions will have their day and date columns highlighted differently in the **Daily Summary**.

Monday	Oct 11	Flexi MF
Tuesday	Oct 12	Flexi MF
Wednesday	Oct 13	Flexi MF
Thursday	Oct 14	Flexi MF
Friday	Oct 15	Flexi MF

If enabled in User Groups, pending clockings and adjustments can be checked by going to the 'View' menu and then 'Pending Clockings' or 'Pending Adjustments'.