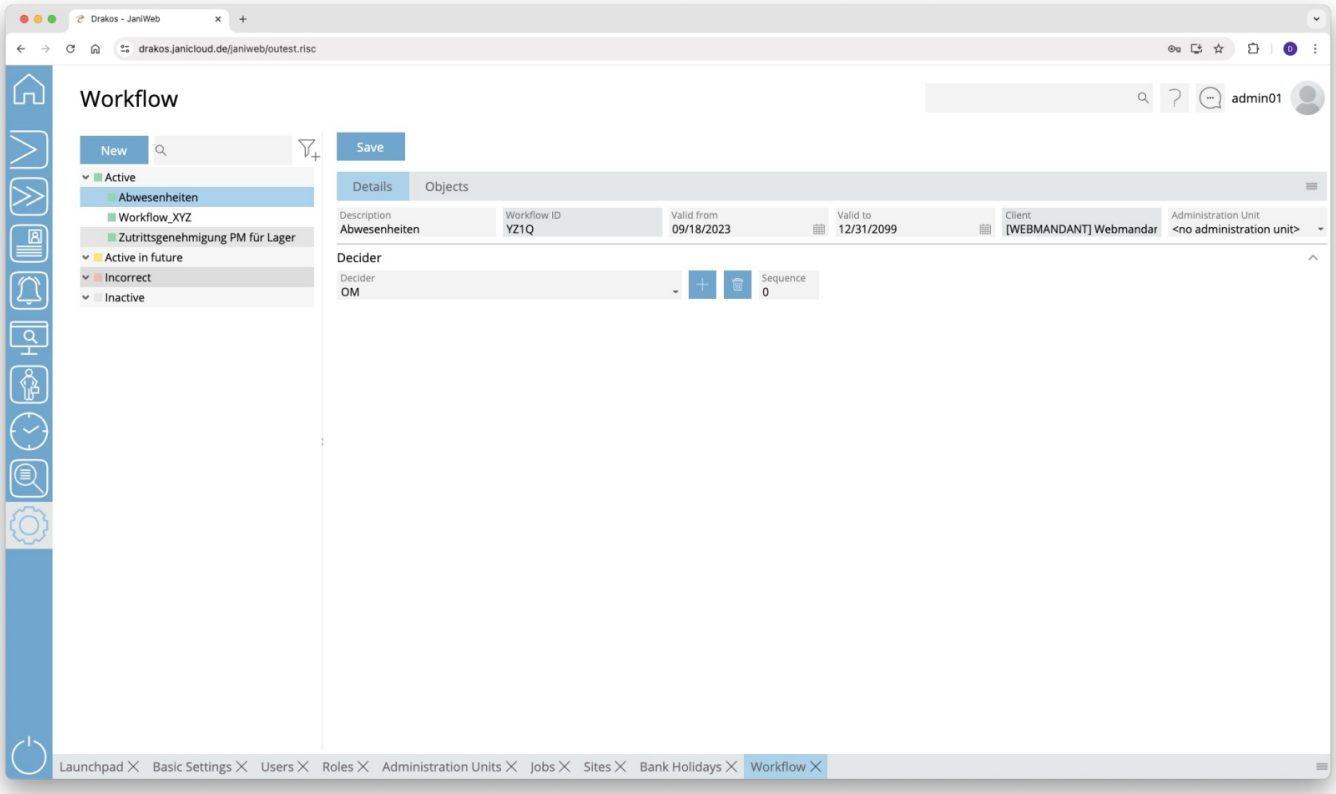
Workflow

The menu option *Workflow* allows you to manage the approval process, for example, to process absence requests or to secure the assignment of permissions.



List of workflows

The list contains all workflows that have already been created. Select an entry to view details.

Button *New*

Press *New* to create a new workflow. Enter a description, a validity period, and a client, and press *Save*.

Tab *Details*

In the area *Approve*, specify the persons who are allowed to approve a request created for this workflow.

- Select a *Decision Maker*. Press the plus icon to add further decision makers.
- *Sequence:* If there are several decision makers, use this to determine the sequence in which the request must be approved. Enter a number for each. If the same number is entered for two decision makers, both must approve for the request to proceed to the next step in the workflow.

Tab *Objects*

Use this to determine what triggers the workflow.

List *Object Type*

- Select *Absence* to trigger the workflow by absence requests, home office times or similar.
  - Select whether absence times in the *Past* and/or in the *Future* should be taken into account.
- Select *Booking* if the workflow is to be triggered by manually creating bookings.
  - Select whether booking times in the *Past* and/or in the *Future* should be taken into account.
- Select *Permissions* if the workflow should be triggered when permissions are assigned for specific devices or device groups.
  - Select the *Device* and/or *Device Groups* for which the workflow should apply. Press the plus icon to add further devices or device groups.
  - (Optional) Under *Person Groups*, define which persons trigger the workflow when they try to assign permissions for the specified devices or device groups.

For information on how to edit workflow requests, see the Workflow section.

> Alternatively, you can also define the respective workflow for individual absence types in the module *Time and Attendance > Settings > Tab Absence*.

TIPS

A Workflow Report allows you to track all approvals.

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