Template Applications – Professional Development Request

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Introduction

This application contains five pages to manage a request to attend a professional development event and associated cost reimbursement. The first page collects details about the employee and the event. The second contains the expense fields, and the third page includes the initial approvals before the event. Once the event is over, the fourth page contains any permissions needed for expenses over the approved initial limit. The final page is where the request history is captured, along with any comments added at different process stages.

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Workflow Logic

All requests will require approval by the employee's manager. The manager may approve, request more information or deny the request.

If the manager approves, the request moves to the HR, Finance & Admin user(s) for approval. These users may deny the request but do not have the option to request more information. This process demonstrates parallel consent, where two or more people decide simultaneously. If any of them rejects the request, the claim is denied. Only when all three decision-makers approve the request does the claim move forward to the Director, who may agree, decline, or ask for more information. If a claim is partially approved but not rejected, it will remain at the workflow's HR, Finance, and Admin Decision stage.

If the manager approves the request, the employee will enter the expense details after the event ends. If the actual costs are higher than the approved, estimated expenses, the extra amounts will go to the Manager and Director for approval in parallel.
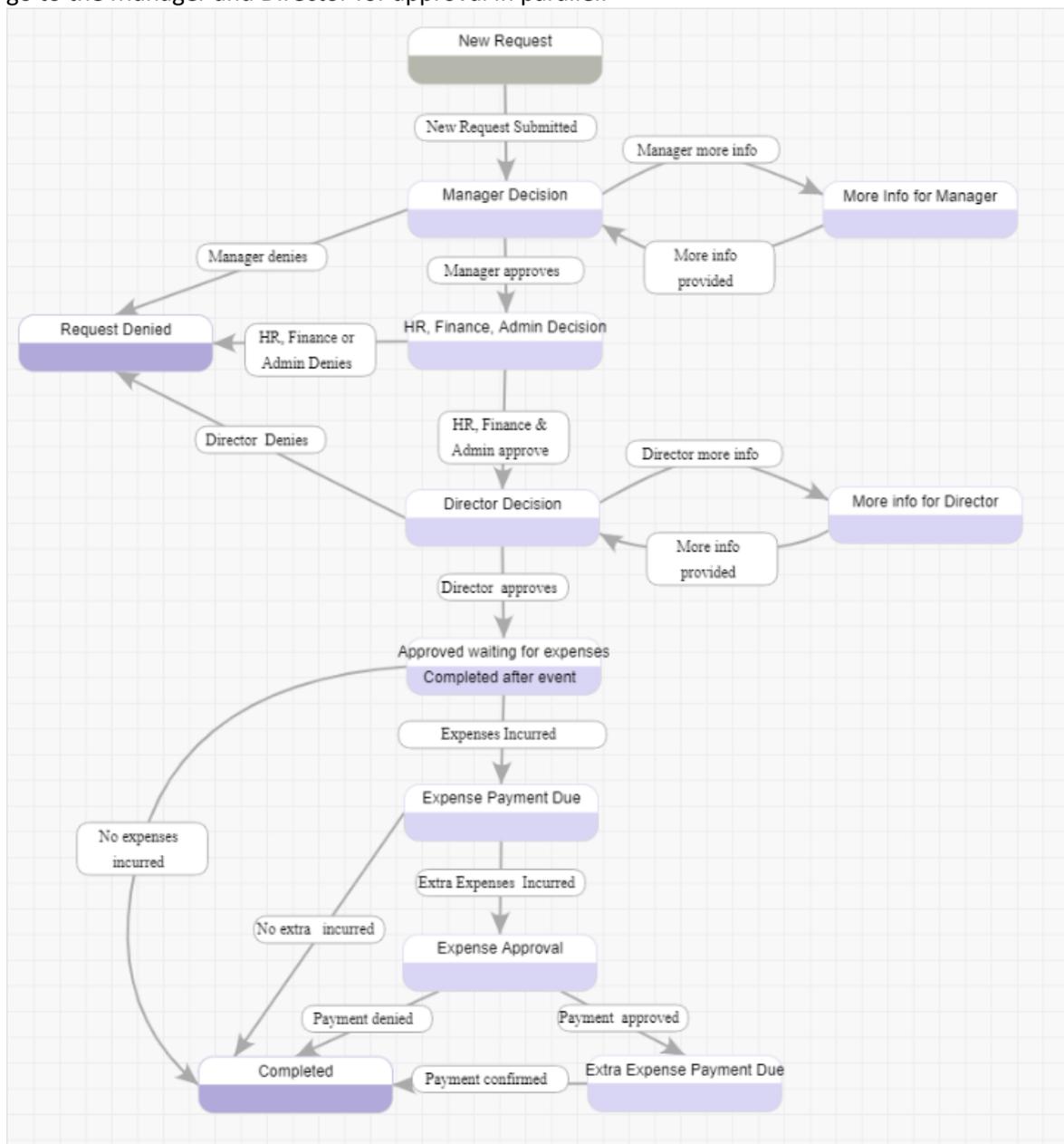
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Notable Behaviors

Each subsequent page contains a header containing the employee's name, event name, and start date. That header is constructed when any of the three fields on the first-page change. Note that the logic is attached to the 'Employee Name Changes' event and triggered from the other two fields using the 'Run Behavior' command.

There is logic on the event date fields to prevent this app from being used for events closer than ten days in the future. Further behavior stops the 'from date' from being set after the 'to date' on those fields and the 'away from work' dates.

Behaviors on the 'Expenses' page will calculate the amount to be paid initially and the amount that needs further approval once the actual expenses are added.

Logic on the workflow pathways will populate the 'History' field on the final page. Additional comments may be added, specifically by the employee answering the call for more information from approvers.

Installation Instructions

This application is designed in demonstration mode. Notifications go to the e-mail address entered into the 'Employee 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 location manager is stored in the drop-down object on the app. Notifications are sent to that e-mail addresses.

The first modification would be to change the drop-down location field to include the suitable locations (Caption) and the correct e-mail address for the location managers (Value).
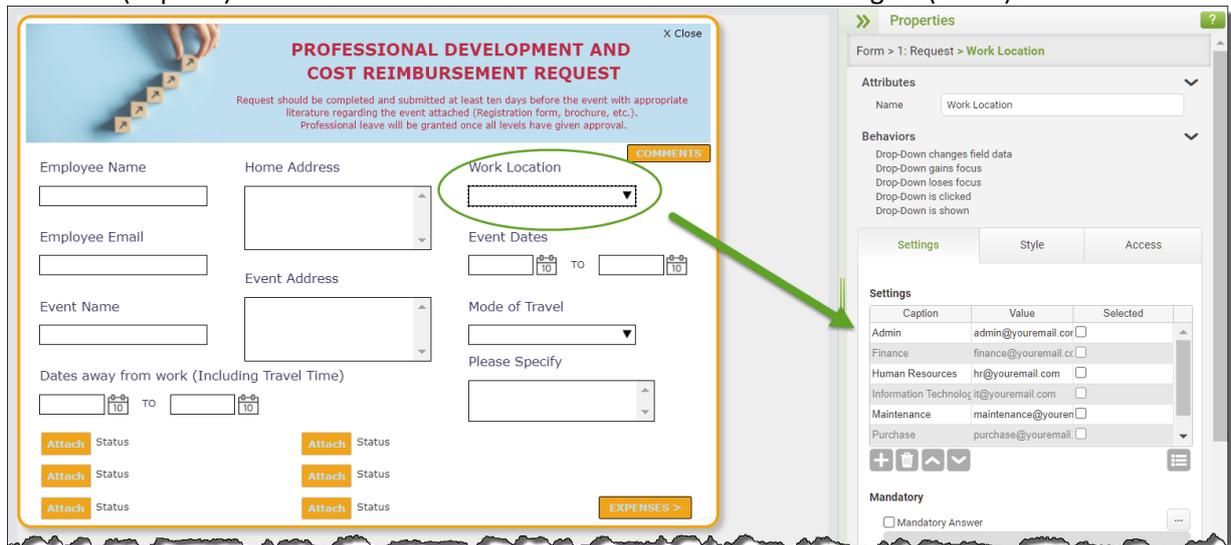
The second modification would be in the workflow properties to re-set the roles to link to those who would occupy that role.

The same person or group will typically occupy the HR, Finance, and Admin roles. Hence, it's not necessary to identify them in the application. Still, these roles can be linked directly to your system's user, position, group, or specific e-mail address. This change will need to be done before publishing the application.

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The location supervisor manager can be linked to the value of the respective 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 Manager role in the workflow properties and the 'Roles' table and click the Edit button.
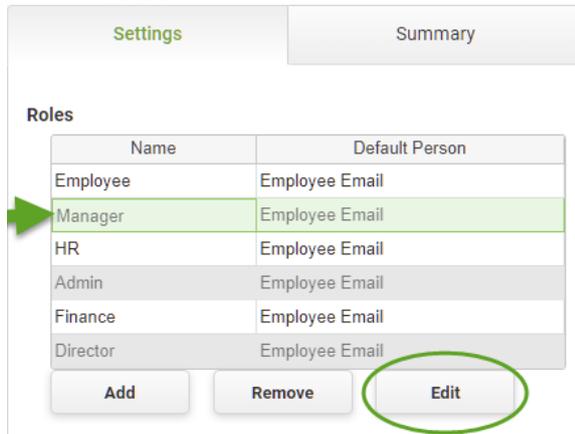
You will see that the role currently links to the 'Employee E-mail' field, which you need to change before publication.
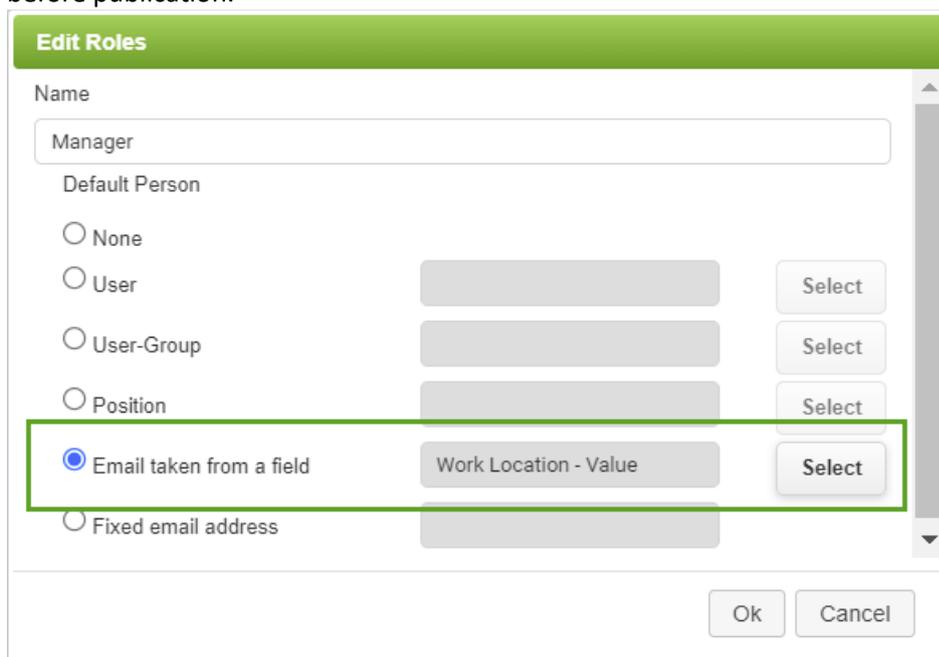
Select the Value of the Work Location drop-down.

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The roles can be linked slightly differently for the three other roles, HR, Finance, Admin & Director.

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

1. If your HR, Finance, Admin, or Director are individuals and have 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. You may link directly to that group if you have set up a User-Group for any of these roles.
3. 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.
4. 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 graphic 'Header' is included in the individual pages and can be removed if you prefer alternative graphics.
In the app properties panel, use the Style section to modify the color and fonts for the main objects and fields.

Mobile Version

This application is not enhanced for mobile use, but it would be possible.