
Simply Personnel Business Process Designer

Version 8.00
February 2007

Contents

INTRODUCTION	3
COMMON RULES & TERMINOLOGY	4
A PROCESS	5
WHERE TO START	6
DIFFERENT TASKS	7
PROCEDURE DESCRIPTIONS & EXAMPLES	13
A SIMPLE PROCEDURE.....	13
A DECISION PROCESS.....	18
A SELECTION PROCESS.....	20
WAITING WITHIN A PROCESS.....	22
MULTIPLE PARENTAGE.....	24
REPEATING TASKS WITHIN A PROCESS.....	25
SUBTASK.....	26
CHECKING DATA WITHIN A TASK.....	27
UNDOING TASKS.....	28
DELETING A PROCESS	29

Introduction

The Simply Personnel Process Designer allows you to modify existing YellowPad processes and to develop your own.

The process designer is an advanced tool, the instructions below are provided to introduce you to the system and put together the common types of processes you may need.

The Simply Personnel process designer allows you to specify your common processes so that they can be performed with a level of consistency and accuracy. Simply Personnel already includes common processes which you can use or modify, these are

- New Starter
- Leaver
- Disciplinary
- Grievance

It is possible to put together very advanced processes this is a task that is commonly undertaken by the Simply Personnel support team – it is possible to export and send and receive and import processes to the support team from within the designer so that they can assist you.

A tutorial video is also available to support this guide from:
www.simplypersonnel.co.uk/tutorials.html

Common Rules & Terminology

The process designer makes use of common rules and terminology, this section provides details on these.

The processes designer creates processes; these processes are then used against an employee.

After you design a process it is automatically made available on the YellowPad screen for every employee. You can start new processes from the YellowPad screen or see information about existing processes that may be active or archived.

When you modify an existing process within the process designer it will not change any active or archived processes against an employee – the changed process will only take affect the next time you start the process for an employee.

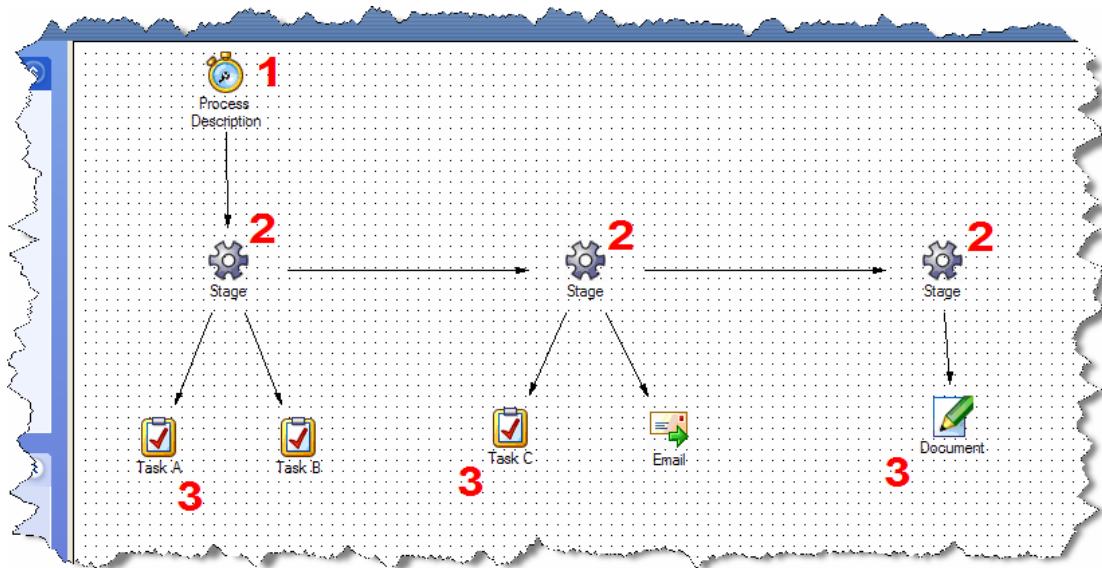
You can create new procedure – these will then be available to use for an employee. You can modify existing procedures – these changes will be reflected when you next start a procedure against an employee – but existing procedures already started will not be affected by any changes you make.

A process consists of a Lifecycle. A lifecycle has one or more stages and each stage has one or more tasks.

Each task in a stage must be completed before moving onto the next stage.

There are different types of tasks that can be attached to a stage depending upon what needs to be accomplished.

A Process



A process consists of one process header (1) more than one stage (2) and a number of tasks (3) under each stage.

There are different types of tasks that can be attached to each stage.

All tasks in a stage must be completed before moving onto the next stage.

Where To Start

Before attempting to map any of your processes with the Simply Personnel Process Designer we suggest you first draw out a flow of what you would like.

Here are some tips:

1. Chose a short meaning full name for the process, like “New Starter”
2. Decide what needs to happen – but don’t make it to complex to start with you can always enhance the process later, for example for a new starter we need to:
 - a. Ensure the system has information entered
 - b. Send the employee a contract
 - c. Wait for the contract to come back
 - d. Schedule a probationary in 90 days
3. Decide at what stage you would like to be alerted, in the above list it will be useful to be notified if the contract has not been returned on time and when the probationary period is due.
4. Decide if it is better to split the process into multiple processes to avoid complexity – for example rather than having a question within the new starter process to daetermine if this employee is full time or part time because different questions must be asked – create a full time new starter process and a part time new starter process.


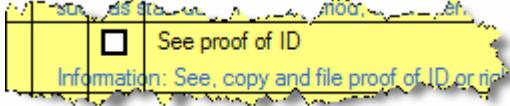
Above all keep your initial processes simple to start with.

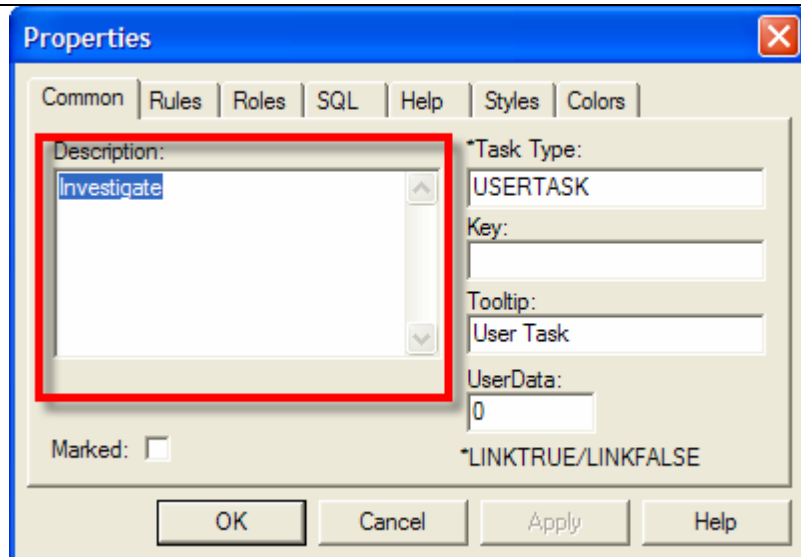
Different Tasks

Each process consists of a number of tasks split into one or more stages. Each task has a number of properties that can be set, these properties control how the task behaves when it is used.

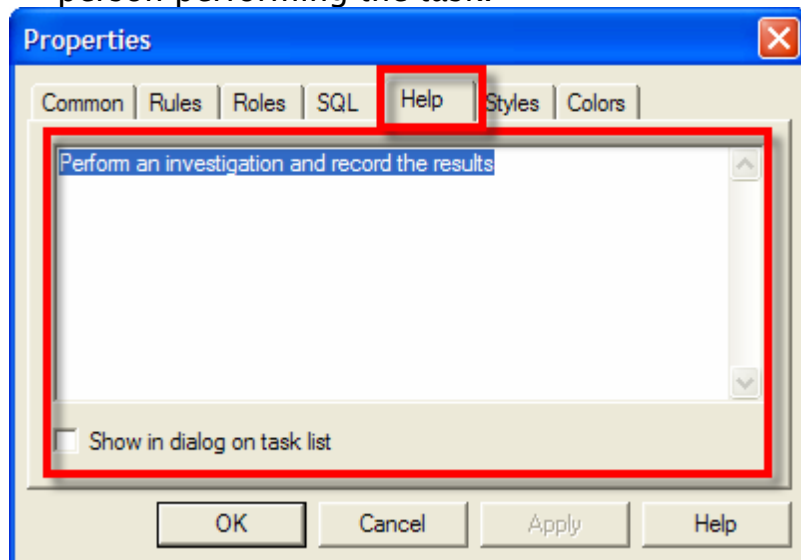
The different tasks available are show below.

It is quite possible to construct even complex processes just using the User Task. The User Task is the most versatile task available and allows you to produce instructional check lists that guide you through a process consistently every time.

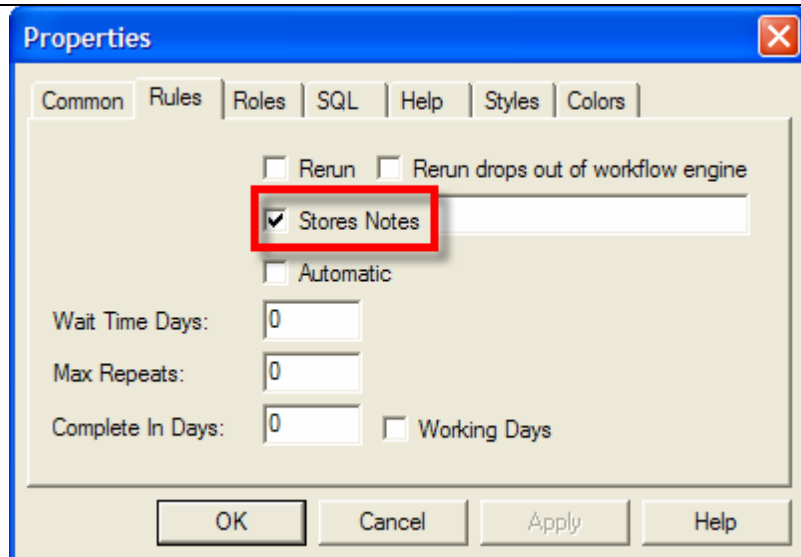
	<p>User Task. The user task is the most versatile task within the process designer. A user task simple provides you ask a question and allow a check list to be entered.</p> <p>For example here is a user task asking for confirmation that the proof of ID has been seen.</p>  <p>It is quite possible to create processes without needing to have any more knowledge than how to create and work with user tasks.</p> <p>To set a task property you can double click on the task or select it and then right click on it and choose the properties option from the pop-up menu.</p> <p>A user task has the following properties that can be set:</p> <ul style="list-style-type: none">- Description to show on the task list. Keep the description short and concise, if possible limit it to one line.
---	--



- Help message to show on the task list screen to aid the person performing the task.



- Stores Notes allow the person confirming the task to enter notes about the which are then shown in the task list



- Complete In Days allows you to specify how many days the tasks should be completed within, the task will automatically be flagged up on the Task List screen with either a Green, Amber or Red traffic light the nearer it comes to completion date.

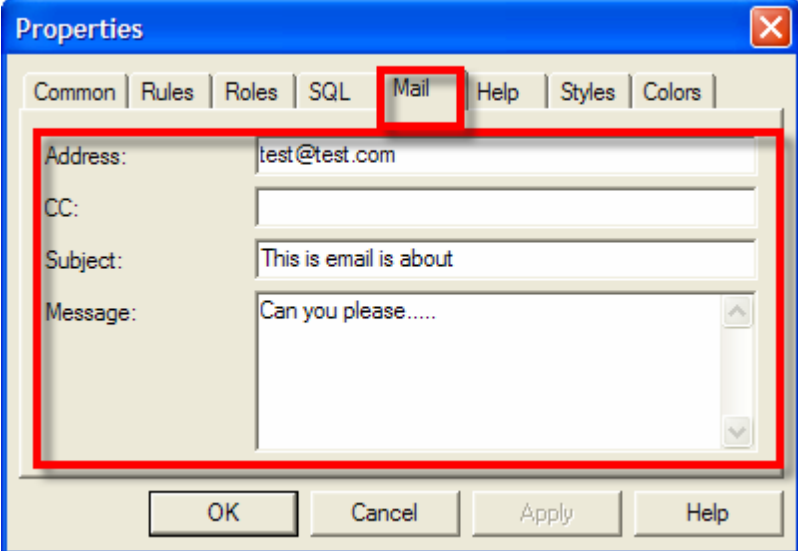





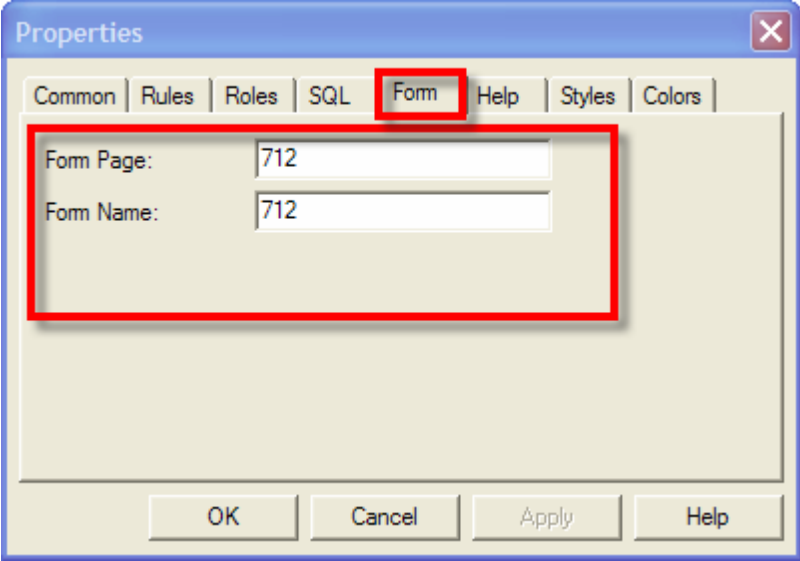

Email Task. The email task provides a convenient of sending an email within the task list.





When this task is checked within the task list a Microsoft outlook window will be opened allowing you to send the email.

An email task has the following properties that can be set:

- Description to show on the task list
- Help message to show on the task list screen to aid the person performing the task
- Stores Notes allow the person confirming the task to enter notes about the which are then shown in the task list
- Complete In Days allows you to specify how many days the tasks should be completed within, the task will automatically be flagged up on the Task List screen with either a Green, Amber or Red traffic light the nearer it comes to completion date
- Email subject, address and email body that you want the email to default to.

	
	<p>Document Task. The document task allows you to specify a document to be mail merged and stored against the employees document record.</p> <p>In this version of the process designer you do not need to enter any properties as selecting this task from within the task list will take you to the Document screen for an employee.</p> <p>You can however set the following properties if required:</p> <ul style="list-style-type: none"> - Description to show on the task list - Help message to show on the task list screen to aid the person performing the task - Stores Notes allow the person confirming the task to enter notes about the which are then shown in the task list - Complete In Days allows you to specify how many days the tasks should be competed within, the task will automatically be flagged up on the Task List screen with either a Green, Amber or Red traffic light the nearer it comes to completion date
	<p>SQL Task. The SQL task is a specific task that will execute a SQL instruction when it is clicked.</p> <p>An example of where it is currently used is to set the</p>

	<p>probationary period automatically within the new starter process that is provided with Simply Personnel.</p> <p>The SQL task will execute any SQL, it will use the EntityClassification and EntityClassificationKey to access the current employee record.</p> <p>This is an advanced option and will need to be initially set with the help of the Simply Personnel support team.</p>
	<p>User Form Task. The user form task will bring a specific tab on the employee record to the front.</p> <p>The ID numbers of the available tabs are available from Simply Personnel support.</p>  <p>The screenshot shows a 'Properties' dialog box with tabs for 'Common', 'Rules', 'Roles', 'SQL', 'Form', 'Help', 'Styles', and 'Colors'. The 'Form' tab is selected and highlighted with a red box. Inside the 'Form' tab, there are two text input fields: 'Form Page:' and 'Form Name:', both containing the value '712'. These two fields are also enclosed in a red rectangular box. At the bottom of the dialog are buttons for 'OK', 'Cancel', 'Apply', and 'Help'.</p>
	<p>Wait Task. A wait task will allow you to specify the amount of time that you should wait for a specific event to take place.</p> <p>If the event does not take place within the specified period then you can instruct the task to go down a different route than if it does.</p> <p>It is not necessary to use a wait task unless you want the process to go down two different routes based on the wait expiry occurring, it is suggested that the Complete In Days</p>

	option is used on a User Task to achieve a wait that will trigger the traffic light system within Simply Personnel.
	Start Lifecycle. The start life cycle task starts a new process concurrently with the active process.
	Fail task. The fail task fails the whole process. The task type can also be edited and set to PASSTASK in which case this task passes the whole process.
	Selection Task. The selection prompts you to choose one of many options, when one option is chosen the others are no longer available for selection. There is an example on how to use this task in this document.
	Decision Task. The decision task prompts for one of two questions based on the answer a specific path is followed in the process. There is an example on how to use this task in this document.

Advanced Notes

Particular types of tasks can have the AUTO check box ticked. In addition these tasks may have CHECK rules set for them, in this case the task list will automatically determine the outcome and either pass or fail the task.

Procedure Descriptions & Examples

The best way to demonstrate the options available within the procedure designer is to provide some examples.

Many of the examples can be combined to create comprehensive processes – but a golden rule of process design is to key it simple.

A Simple Procedure

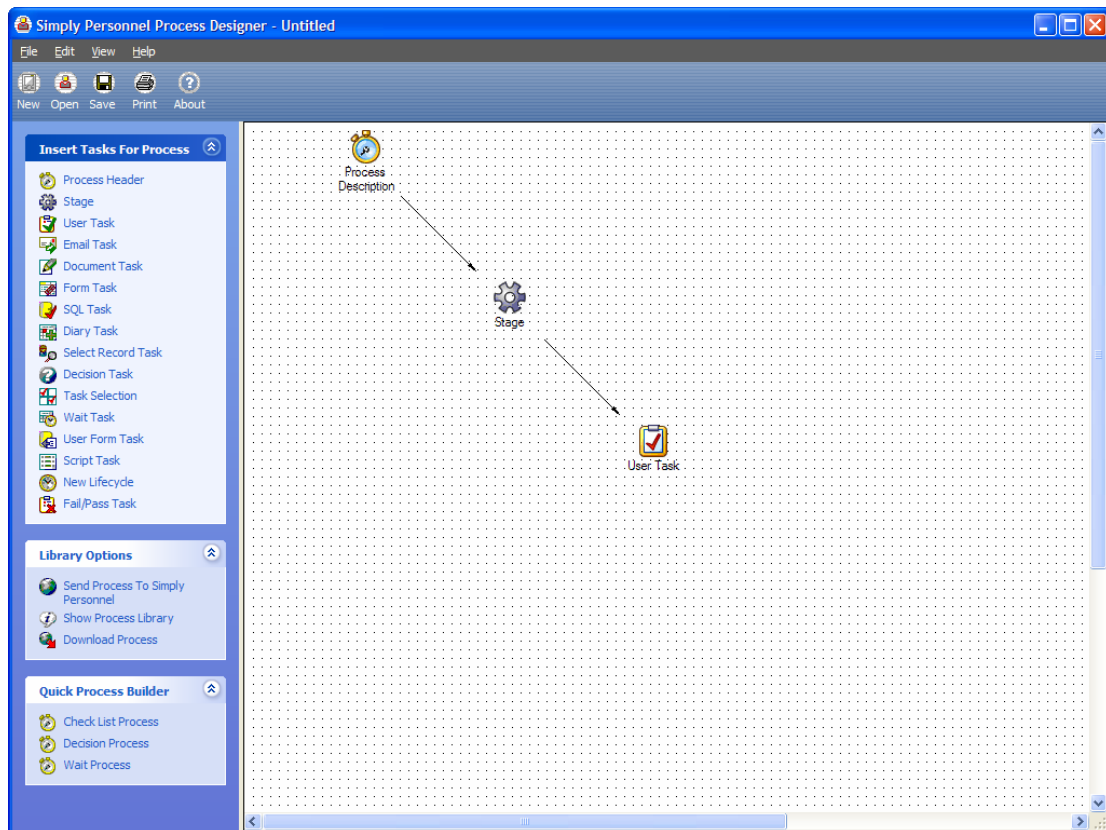
This example introduces you to a simple procedure.

Start the procedure designer from within Simply Personnel (Tables, Business Process Designer).

You will be selected with the procedure designer and a blank canvas. The canvas area is where you draw your procedures.

All procedures must have a lifecycle, so the starting point is to insert a lifecycle, you can do this in two ways either right click on the canvas and select Process Header or use the bar on left.

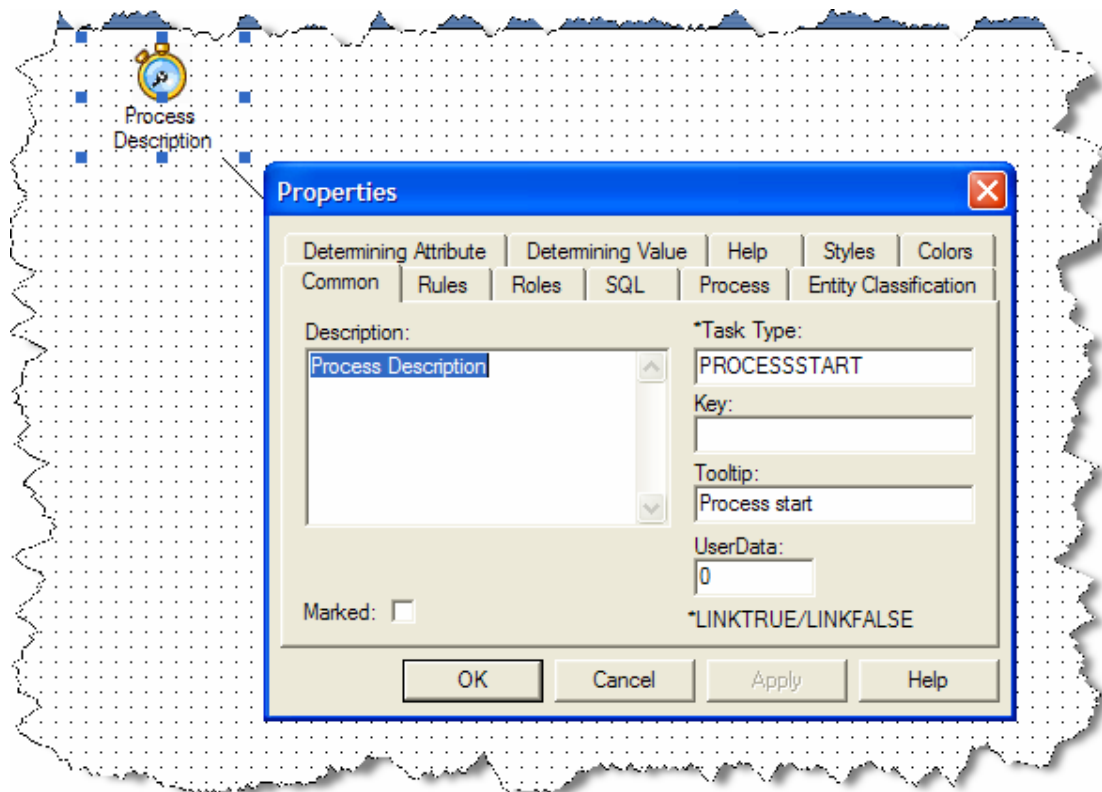
A new lifecycle with an attached stage and task will be shown. You can create additional stages and tasks.



You can now modify some of the properties for the lifecycle and stage. To do this right click on one of the icons and select properties from the popup menu or double click on the icon.

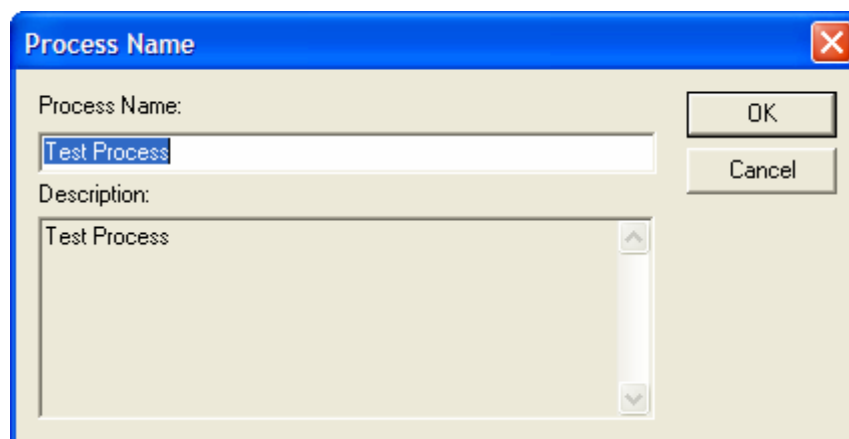
To delete a task, highlight it by clicking on it with the mouse and press the delete key on your keyboard.

Right click on the lifecycle icon and select properties, the follow screen will be shown:



Change the description from Process Description to Test Process. You can also change the properties of some of the tasks, a common property you will want to change is the task description – this is what is shown in the YellowPad screen when the task details are shown.

Now press the save button on the toolbar you will be shown the save screen:

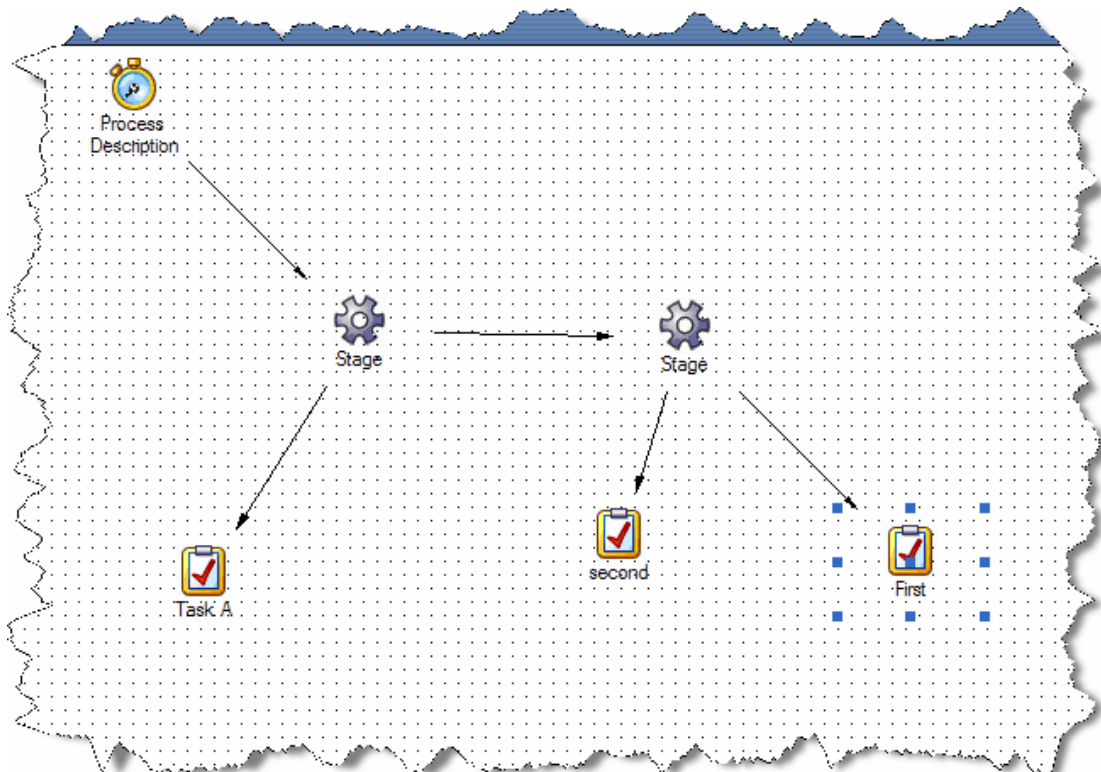


You can select OK to save changes to this process – if this was an existing process then you could make a copy by changing the name of the process.

Now go to Simply Personnel, select an employee, go to the YellowPad tab folder and select Test Process as the process to start.

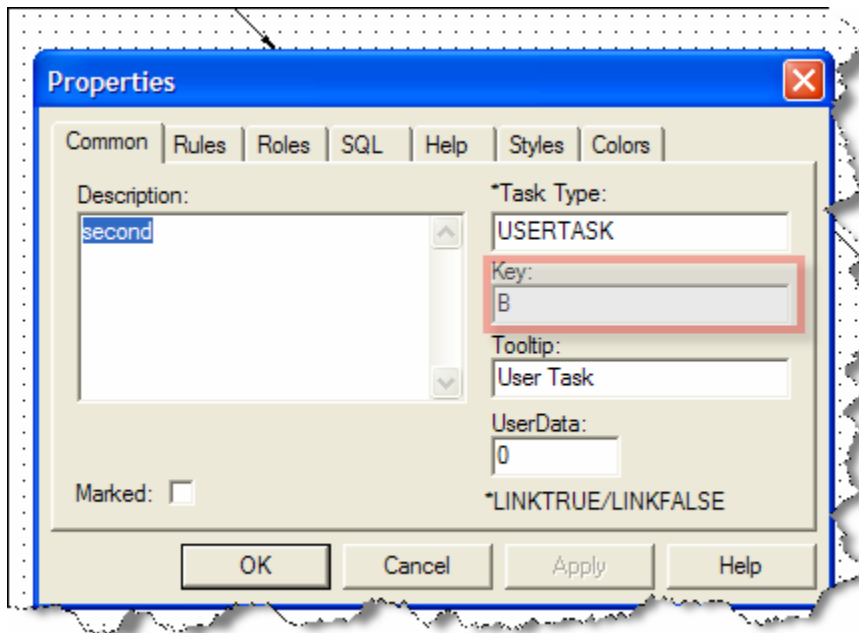
You will be prompted for the first task on the list.

Now create a process with two stages:



To do this click on new to start a new process, insert a lifecycle, then click on the first stage and insert a stage, then insert two tasks for the second stage by right clicking on the stage and selecting insert task. As each task is inserted you will need to move it so it does not appear on top of each other.

Next change the descriptions of each task to second and first as shown. You can alter the order in which the tasks appear within the YellowPad screen by entering a letter in the Key field, enter A, B, C, etc.



Now save the process as Test Process, overwriting the existing one and start the process within Simply Personnel to see the affect, you should see that you will now be taken through the tasks in two stages.

Advanced Notes

This is a simple process – you can now select it within Simply Personnel under YellowPad. It will run through the process and set the status of each of the tasks to PASSED and the status of the process to COMPLETED when all the tasks within all the stages have been PASSED.

A Decision Process

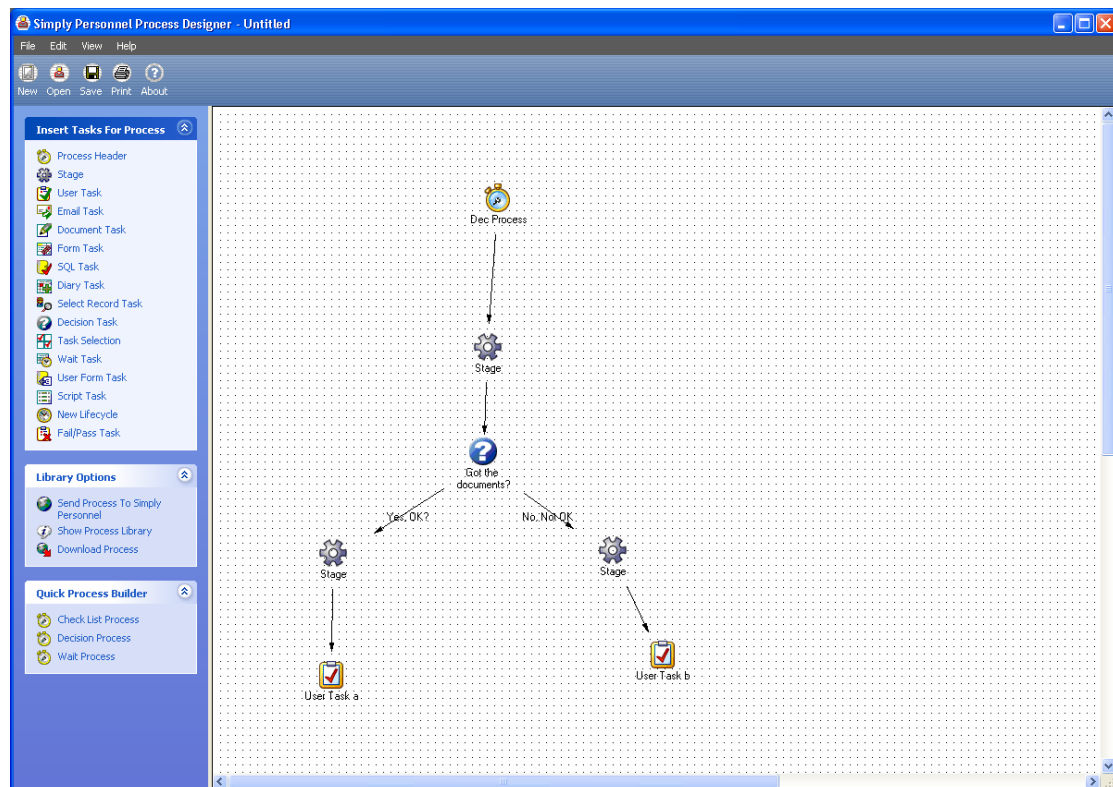
This example shows you to direct the flow of a procedure down two different steps based on a question that is asked when a process hits a special type of task called a decision task.

Click on the new button on the toolbar to begin creating a new procedure.

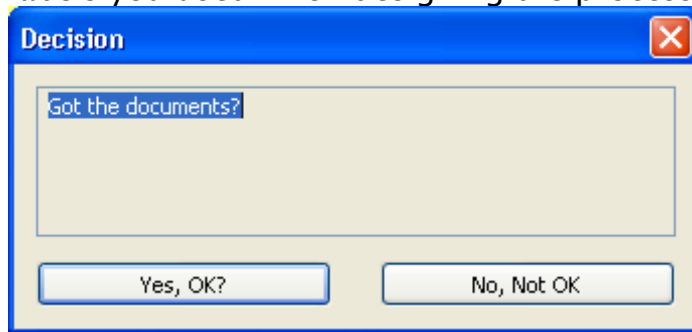
Select the user task and press the delete key, the user task will be deleted.

Select the stage and then right click and inset a decision task, the decision task and the appropriate branches will be created for you.

A decision task allows the process to ask a question and continue down one of two paths by following a specific stage based on the answer you enter.



The decision task itself will appear as a question in the YellowPad window the question and the answers will be dependent upon the labels you used when designing the process.



A decision task should not be combined with any other stages, so in this case once a decision has been made to go down a particular stage you cannot link additional stages to the stage that contained the decision task.

Advanced Notes

Then there are two stages linked, the link for the TRUE stage has LINKTRUE in the task type the link for the second stage has LINKFALSE for the task type on the actual link itself.

Selecting either option will not FAIL the process. Selecting YES will set the DECTASK to PASSED and the other task to PASSED for the valid stage and NULL for the stage that has not been executed.

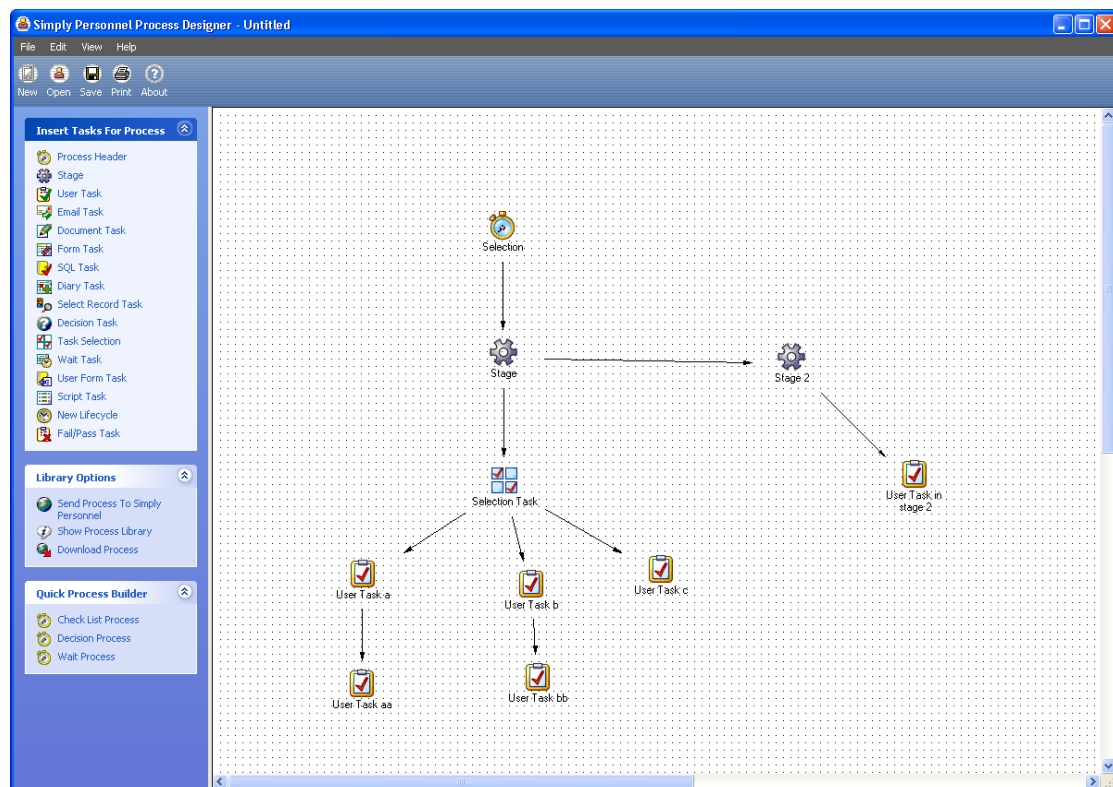
Selecting NO will set the DECTASK to RAN and the other task to PASSED for the valid stage and NULL for the stage that has not been executed. YellowPad will show a big red X next to a RAN task.

A Selection Process

This example shows you how to use a selection task. A selection task presents you with multiple options within the YellowPad task list but only allows you to select one.

The task which is selected can have subtasks to specify an additional processing that should take place.

In this example the YellowPad screen will probe for task A, task B or task C. If task A is selected then an additional task, task AA will be shown.



Advanced Notes

The task status will become N/A for those tasks that are not selected from a selection task, and their children will remain at NULL. Otherwise if selected it may be RAN or PASSED depending upon the answer given

in YellowPad when prompted for passed or failed, this is like the DECTASK.

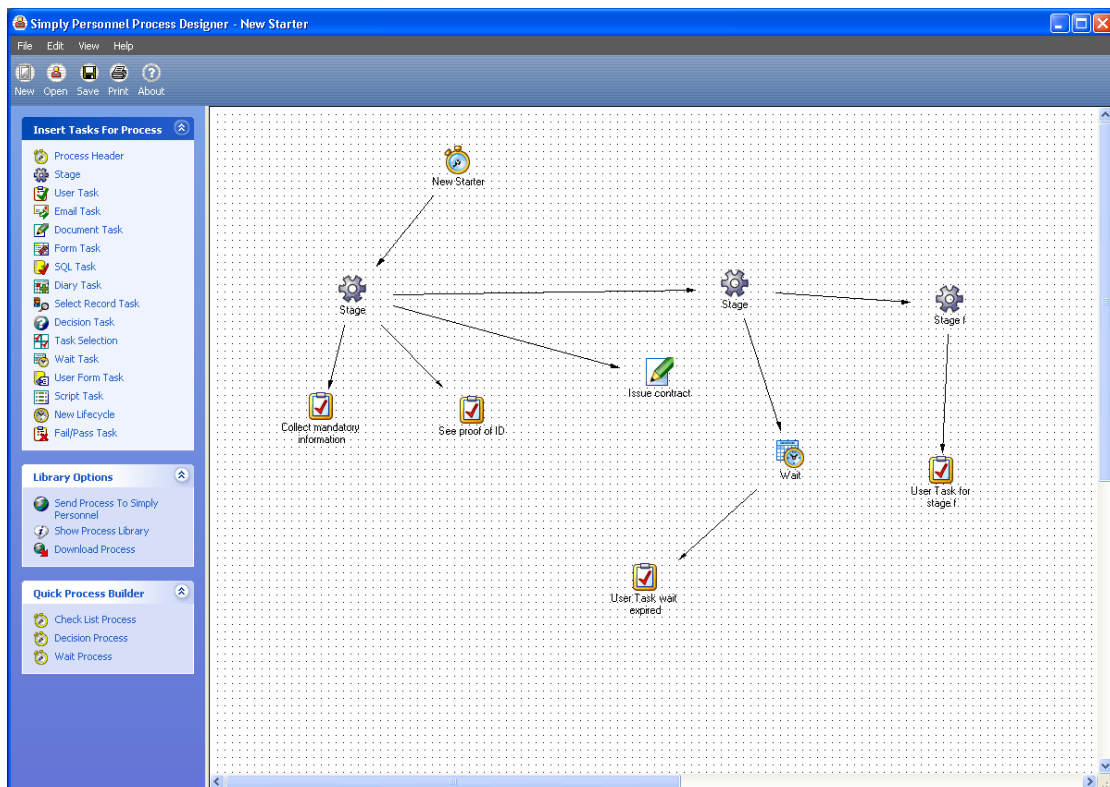
In theory the task from a selection task can be a WAITTASK and this in turn can contain a SQL to determine the WAIT attributes.

Waiting within a Process

The simplest way of waiting with a process is to set the Complete In Days field on a task within the task properties. The task will then appear within the Simply Personnel task list and will proactively alert you using the traffic light system.

In addition to setting the complete in days property you can also insert a special type of task called a wait task.

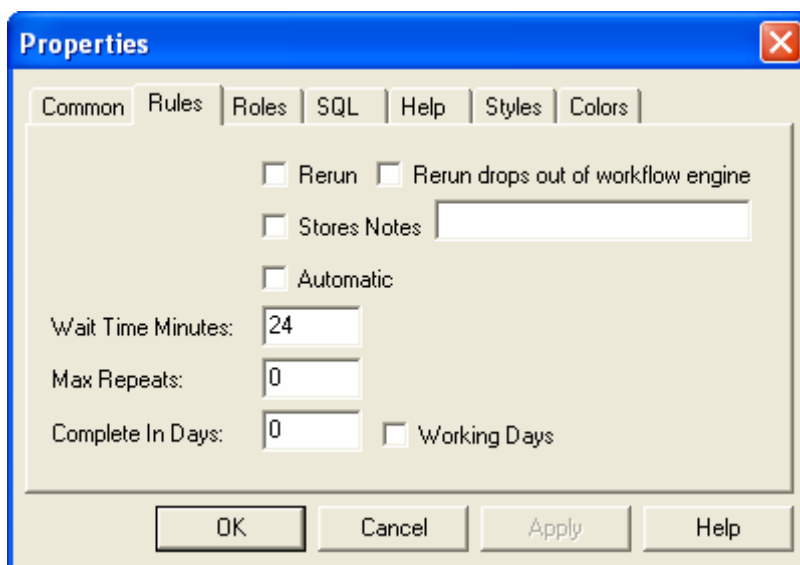
When you click on a wait task you will be prompted if the task has failed or completed, if you answer failed then any sub tasks associated with the wait task will be started. In all cases the wait task will show with a red “x” against it in the task list.



Advanced Notes

In the example above if the WAITEXPIRES it will become RAN then the subtask associated with it will be STARTED. A WAITTASK cannot be the start TASK of a Life Cycle.

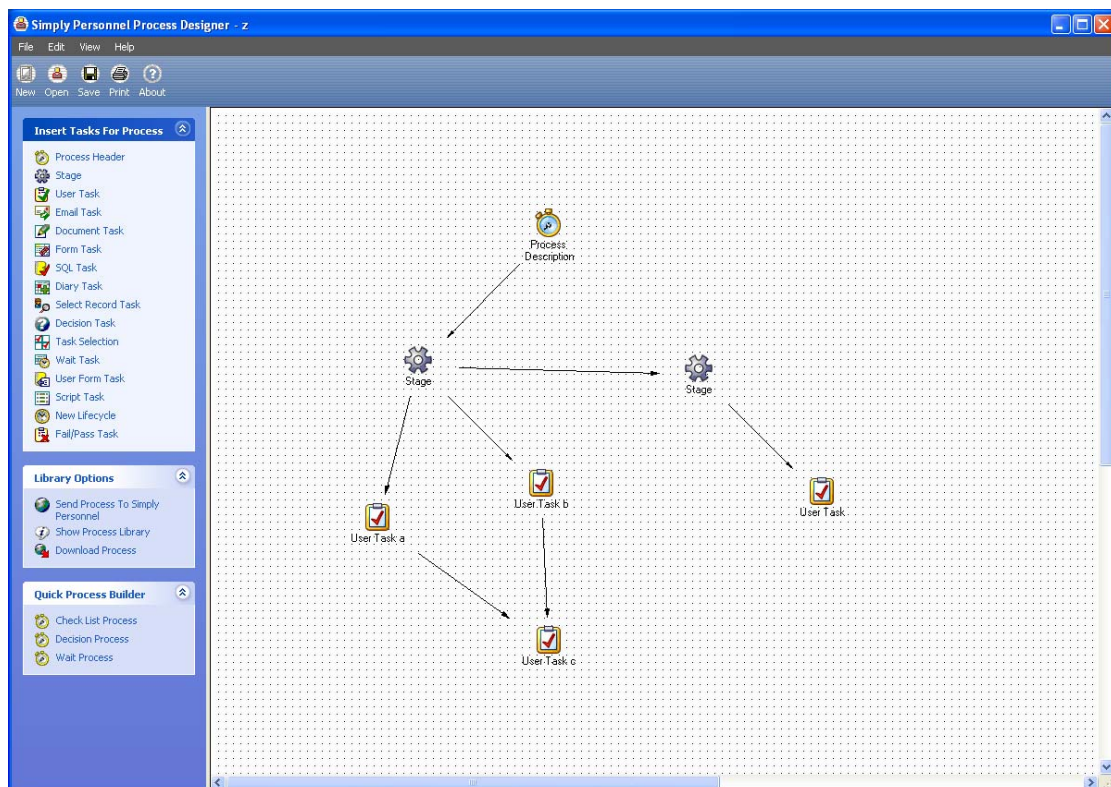
A task does not need to be a WAITTASK for the WAITTIME in minutes to be effective and show on the task list – BUT it does not need to be a wait task for the Complete In Days field to be set. This way even a task like a USERTASK can be marked to be completed in x days, The YellowPad will show a reminder of when the task should be created. Complete In Days should not be used with a WAITTASK only WAITTIME in minutes



Multiple Parentage

Multiple parentage tasks can be used to execute the same subtask if one of the parent tasks fail.

In the example below if User Task A passes and User Task B passes User Task C will never execute. But if A or B fail then C will be executed.



The process will still complete regardless of the outcome.

Repeating Tasks Within A Process

Either a task within a stage or the whole stage can be repeated within the workflow engine.

The basic concept is that a task repeating can repeat a stage or another task a number of times.

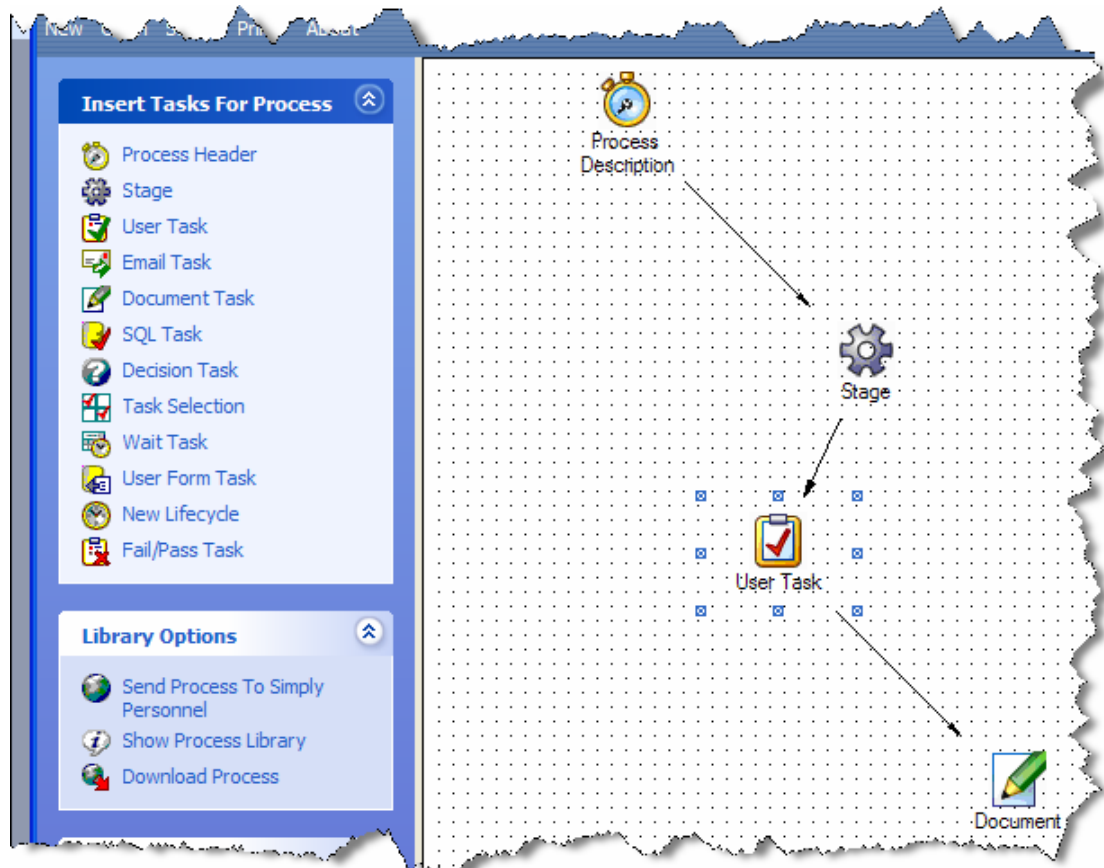
The task that initiates the repeat will always become PASSED. There are various options available when initiating a repeat it can be done as a subtask in which case there is an option for the question to be asked, i.e. Failed or Passed before running the repeat task or it is possible to run it directly.

In either case the MAX Repeats field will limit the number of iterations of the loop.

Repeating is an advanced option and is recommended to be implemented after discussing your process with Simply Personnel support.

Subtask

A task may have a task linked to it, this is called a subtask.



When a task with a subtask is encountered you will be prompted to specify if the task has passed or failed, selecting failed will show the subtask. In this example if the failed option is selected when user task is shown then the document task will be made available.

Advanced Notes

Any task that has a subtask is subject to be asked if it is RAN or PASSED. RAN will move onto the next subtask (the last one will always PASS). Passed will never move onto a SUBTASK.

You can have any tasks as subtasks.

Checking Data within A Task

CHECK(maximumOutcomeID<=89^N/A);

A check can be inserted onto a normal task to check the value of the entity. The task status can then be set automatically. This may be useful when showing more than one task in a stage and wanting to automatically exclude particular tasks from being shown.

The data field will be available due to the correct entity information being supplied in the entity classification.

Undoing Tasks

Tasks can be undone – however the current version of YellowPad does not allow this.

Deleting a Process

To delete a process make sure it is loaded into the procedure designer and then select the delete option under the file menu. You will be prompted to confirm the deletion.