WELCOME TO

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**Session 1107:
Adapting Your Approval Processes
to Time & Attendance Approval Workflows**

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Topics

- Preparing for approval workflows

- Workflow structure in Time & Attendance

- Diagrams of sample workflows

- Demonstration

- Recap

- Questions

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Preparing for Workflow

No Special Tools Required

You don't need to be a Six Sigma Black Belt to get results

You Can Do This

You can do this with the people you have.

They know your processes best.

How Do You Approve Time Now?

Spend time **observing** your current processes in action.

Create **diagrams** based on your observations.

Walk through your diagrams with the participants and discuss each activity in the process.

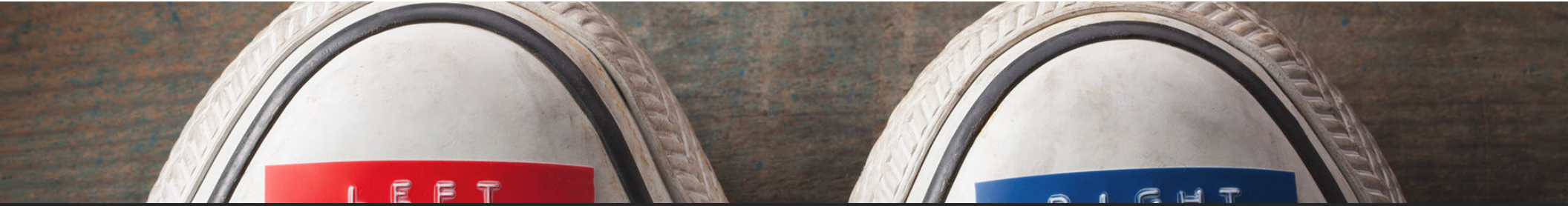**Refine** your diagrams based on these conversations.

A Well-Defined Processes is Your Goal

The process provides a defined standard for completing the approval task.

The process eliminates guesswork and improvisation, improving consistency.

Don't Get Too Detailed

Keep the plan high-level.

Avoid granularity.

Use the largest unit possible for approval criteria.

Start with basic workflows and refine.

Workflow Components

Approval Levels in Time & Attendance

Employee Level
Starts the approval process

Supervisor Level
Completes the approval process

Hours Request

Time-Off Request

Timecard

Approval Workflow Types in Time & Attendance

Approval Step

Unit of approval

Approval Condition

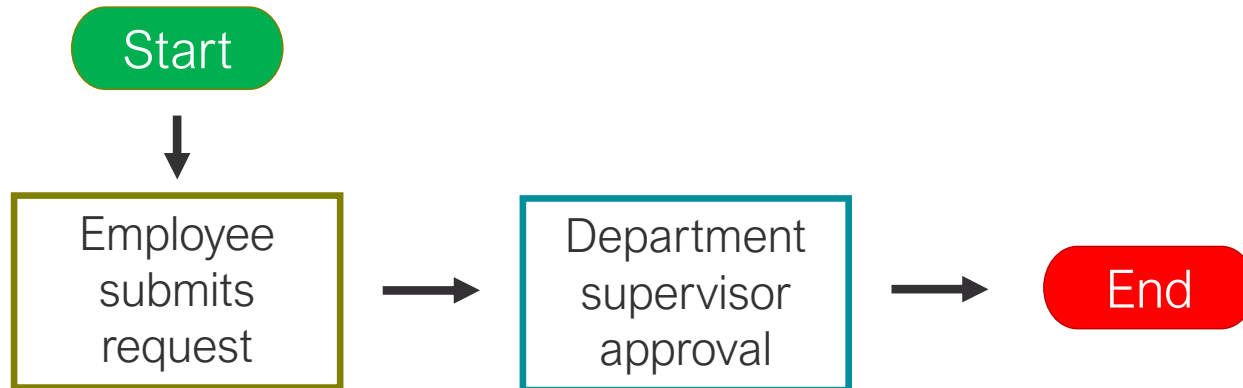Determines how many responses are needed

Approval Criteria

Determines which approvers participate

Approval Workflow Structure in Time & Attendance
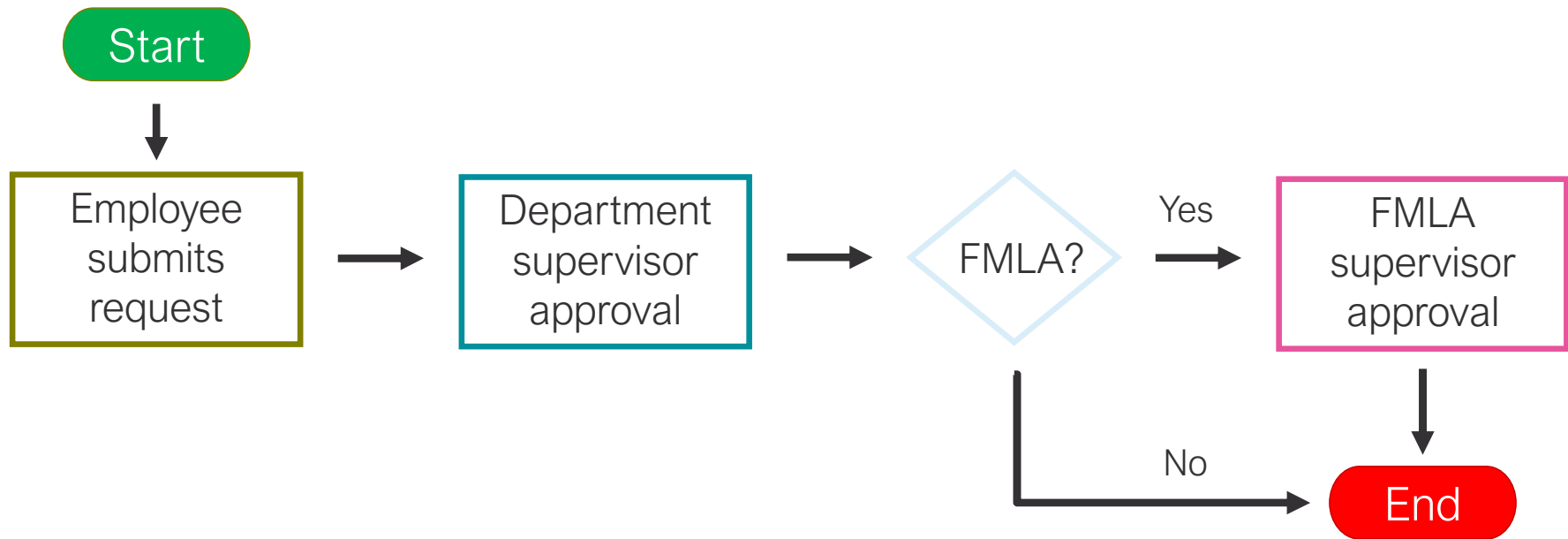
Approval Workflow Diagrams

Time-off Request Approval Diagrams

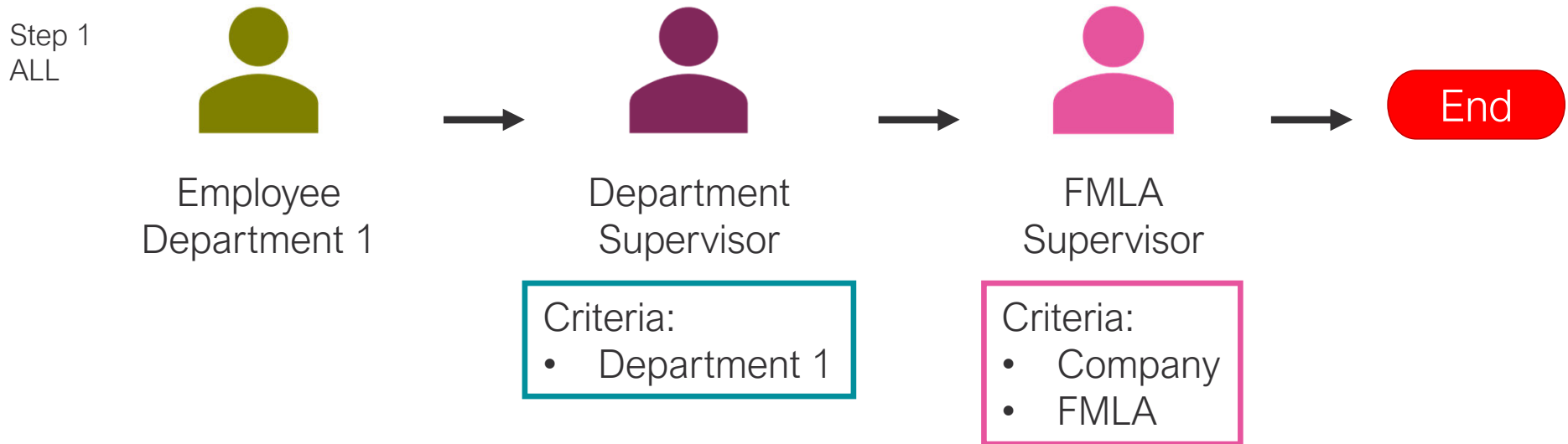Workflow with One Required Approver

Time-off Request Approval Diagrams

Refinement: Workflow with Required and Optional Approvers

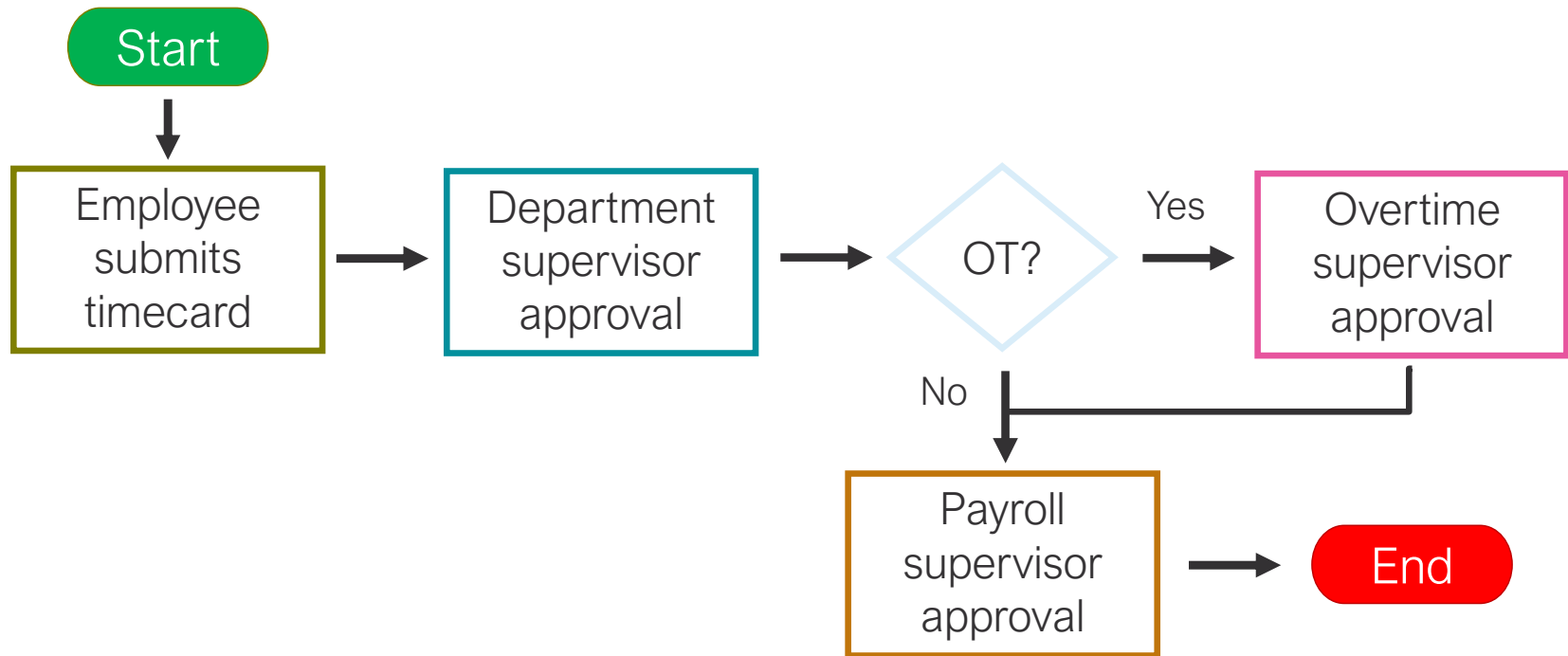# Time & Attendance Time-off Request Approval Workflow

Single Step Workflow with Required and Optional Approvers

Step 1
ALL

Employee
Department 1

Department
Supervisor

Criteria:
- Department 1

FMLA
Supervisor

Criteria:
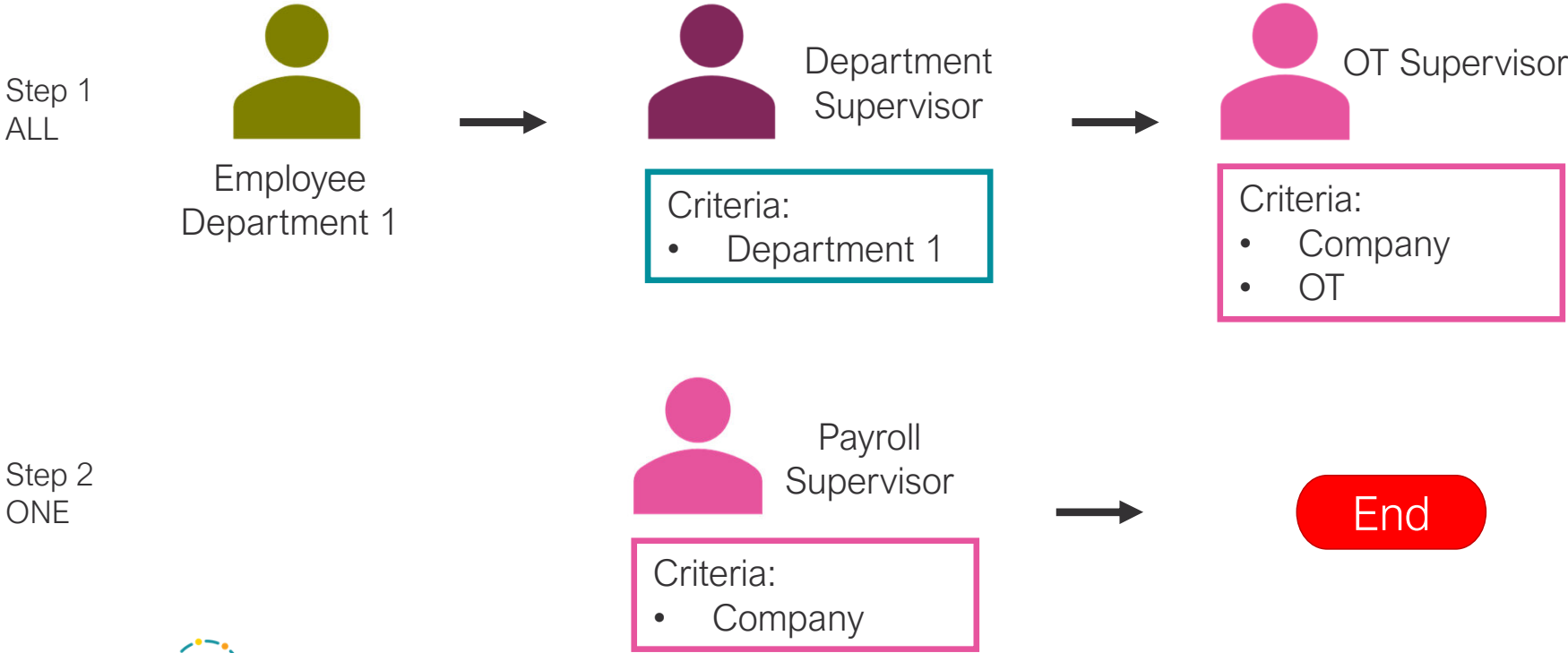- Company
- FMLA

End

Timecard Approval Diagrams

Multi-Step Workflow with Required and Optional Approvers

Time & Attendance Timecard Approval Workflow

Multi-Step Workflow with Required and Optional Approvers

Step 1
ALL

Employee
Department 1

Department
Supervisor

Criteria:
- Department 1

OT Supervisor

Criteria:
- Company
- OT

Step 2
ONE

Payroll
Supervisor

Criteria:
- Company

End

Approval Workflow Demonstration

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Time-Off Request Approval

Employee: Carol Andrews

Supervisor: Dennis Edwards

FMLA: Irene Hamilton

Timecard Approval

Employees: Carol Andrews, Nicole Mason

Supervisor: Dennis Edwards

OT: Bob Parr

Payroll: Brenda Torres

Approval Workflow Review

Approval Workflow Structure in Time & Attendance

- An **approval step** is a defined group of approvers who participate in an approval workflow at the same time. An approval workflow can have one or more steps.

- The **approval condition** defines how many approvers need to respond to complete the current approval step. The options are **all** or **one**.

- The **approval criteria** is the set of the rules that determine which approvers participate in the approval workflow.

Mapping Your Processes to Time & Attendance

- Add workflow approval steps
  - Each group of approvers that work together represent a step
  - Each step must be completed before the next step can begin

- Set the approval condition
  - Can any approver respond?
  - Do all approvers need to respond?

Mapping Your Processes to Time & Attendance

- Add the approvers to the approval step
  - Each step can have one or more approvers
  - Approvers on the active step can respond in any order
  - Approvers cannot respond before their step is active

- Add the approval criteria to the approvers
  - Criteria determine if an approver is a participant
  - Always use the largest unit that meets your need to minimize total rules

Questions

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