Licence Approval Workflow Configuration

Location Configuration

Locations are defined and linked to employees. The location is used, within an employee location and licence type relationship, by the approval workflow process to determine the workflow recipients who will be required to action the workflow.

8.1 Locations

8.1.1 Location master data

Path: System Administration | Workflow | Licence approval workflow | Master data types | Locations



Figure 36: Master data types | Locations

- Click ‘Open’ to open the list of locations.
- Click ‘Add’ to add a new location.
- Save the new location.

8.1.2 Employee location configuration

Path: Modules | Manage Employees | View / Edit Employee | Employee Profile | Personal Information

An employee should be linked to a location if he/she is expected to obtain licences. The location can be manually updated from the front end or the location can be imported with the employee

import. The location is used, within a location - licence type relationship, by the approval workflow process to determine the workflow recipients who will be required to action the employee’s workflows.



Figure 37: Employee Profile | Location

Location Recipients Configuration

8.2 Location Recipients

Path: System Administration | Workflow | Licence approval workflow | Master data types | Location Recipients



Figure 38: Master data types | Location recipients

- Click ‘Open’ to open the Workflow Location Administration window.

8.2.1 Senior Training Officer(s)

Configure Senior Training Officer(s) who will be required to action licence approval workflows. The Senior Training Officer will receive the workflows based on the employee location and licence type relationship. When there is no Senior Training Officer configured for a specific employee location and licence type relationship then workflows will be directed to the default Senior Training Officer, if a default is configured.

- On the Workflow Location Administration window activate the Senior Training Officer(s) tab.
- Click ‘Add’ to add a new senior training officer, employee location and location type relationship.

- Complete the relationship detail.



Figure 39: Add a Senior Training Officer, employee location and licence type relationship

8.2.2 Engineers

Configure Engineer(s) who will be required to action licence approval workflows. The Engineer will receive the workflows based on the employee location and licence type relationship. When there is no Engineer configured for a specific employee location and licence type relationship then workflows will be directed to the default Engineer, if a default is configured.

- On the Workflow Location Administration windowactivate the Engineers tab.
- Click ‘Add’ to add a new engineer, employee location and location type relationship.
- Complete the relationship detail.



Figure 40: Add an Engineer, employee location and licence type relationship

8.2.3 Licence Administrators

Configure Licence Administrator(s) who will be required to action licence approval workflows. The Licence Administrator will receive the workflows based on the employee location and licence type relationship. When there is no Licence Administrator configured for a specific employee location and licence type relationship then workflows will be directed to the default Licence Administrator, if a default is configured.

- On the Workflow Location Administration window activate the Licence Administrators tab.
- Click ‘Add’ to add a new licence administrator, employee location and location type relationship.
- Complete the relationship detail.



Figure 41: Add a Licence Administrator, employee location and licence type relationship

8.2.4 Defaults

Configure the various Defaults for Senior Training Officer, Engineer, Licence Administrator who will be required to action licence approval workflows. The default recipients will receive the workflows when there is no recipient configured for a specific employee location and licence type relationship.

- On the Workflow Location Administration window activate the Defaults tab.



Figure 42: Default workflow recipients

Override Reasons Configuration

8.3 Reasons Override

Path: System Administration | Workflow | Licence approval workflow | Master data types | **Reasons override**



Figure 43: Reasons override

Revision #1
Created 2021-03-27 15:51:04 UTC
Updated 2021-03-27 15:52:13 UTC