

# Sample Applications

## Administration Functions

Instances can sometimes get stuck. Stuck instances can happen for several reasons:

- An approver deletes their notification by mistake
- An approver changes midway through a request due to a job change
- An approver goes on vacation
- Other

In these cases, it is helpful to include an Administration Function so that a specified user, or users, can access a particular page where they can trigger certain functions. Such functions can include, but are not limited to:

- Re-notifying an existing approver/user (In the case where a notification is lost)
- Notifying a new approver/user (In cases where the previous approver left or changed jobs)
- Forwarding a request to a specific stage, thus bypassing the standard workflow rules

The above three scenarios are demonstrated in the 'Admin Functions Example.'

One significant thing to be aware of is that a Role within a process can only be assigned to an individual by a notification, but that notification does not always have to be sent by email; it could be a non-email notification sent to a Full or Basic licensed user in the PerfectApps system.

In the example, check the following elements.

- On the first page, a special Admin button permits access to an admin page. Pressing this button is the only way to access that page.
- Check the Access Rules applied to that button and notice that only a user with the Admin role defined may access that button; it will be hidden from all other users.

Edit State						
		Employee	Supervisor	HR Manager	Admin	
Stages	Roles	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
New Request	<input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Normal <input type="text"/>	<input type="text"/>
Supervisor Deci...	<input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Normal <input type="text"/>	<input type="text"/>
HR Decision	<input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Normal <input type="text"/>	<input type="text"/>
Approved	<input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Normal <input type="text"/>	<input type="text"/>
Rejected	<input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Hidden <input type="text"/>	Normal <input type="text"/>	<input type="text"/>

# Sample Applications

- In the workflow diagram and on the first path from 'New >> Supervisor Decision,' there is a dummy (non-email) notification to the Admin User. This notification is what assigns the Admin role to that user and ensures the Admin button is visible (Normal) when that user opens the instance. In this case, the Admin user is linked to a Position called 'Admin'. The user in that position must have a Full or Basic License in the system, if not then the notification must be sent by email, and the Admin user expected to keep all notifications for all instances safe.

The screenshot shows the 'Edit Notifications' window. At the top is a table with columns: Title, Attention Level, Role, Person, Time, and Cancellation. Below the table are 'Add' and 'Remove' buttons. Below these are tabs for 'General', 'Person', 'Time', 'Cancellation', 'Message', and 'Email'. The 'Message' tab is selected. In the 'Message' tab, there is a checkbox 'Send by email' (unchecked), a 'Subject' field with the value 'New Absence Request', and a 'Body' field with the value 'Dummy notification to assign Admin role to the Admin user group.' There are also 'Text' and 'HTML' tabs, with 'Text' selected. At the bottom of the 'Message' tab are buttons for 'Insert Field', 'Insert Link', 'Insert Form Instance Number', and 'Attachments'. At the bottom of the window are 'Ok' and 'Cancel' buttons.

Title	Attention Level	Role	Person	Time	Cancellation
New Absence Request	Normal attention needed	Supervisor	Supervisor Email	Now	The instance stage is
New Absence Request	No attention needed	Admin	Admin	Now	Other

Buttons: Add, Remove

Tabs: General, Person, Time, Cancellation, **Message**, Email

☐ Send by email

Subject: New Absence Request

Body: Dummy notification to assign Admin role to the Admin user group.

Buttons: Insert Field, Insert Link, Insert Form Instance Number, Attachments

Buttons: Ok, Cancel

On the Admin page, you will see three functions:

- Function 1 will trigger a re-notification either to the existing Supervisor (email set by default) or to a different user. Use this function when a current notification is lost or a new supervisor is appointed after the request has already started. This function can only be triggered if the instance is currently at the Supervisor Approval stage. The stage will not change as a result of this function.
- Function 2 will trigger a notification to the HR Manager, and it will move the instance to that stage. Use this type of function when you want the Admin user to be able to bypass the Supervisor's approval.
- Function 3 will move the instance directly to the Approved stage without triggering any notifications. Use this function only if you want the Admin user to bypass all approvals, and you don't need to notify anyone because of this action.

# Sample Applications

- Function 4 is a multi-functional (ad-Hoc) feature that will allow the Admin user to send a notification to any email address. That user can have any role assigned to them, and the workflow stage can be changed to any stage, apart from the New stage, as that wouldn't make any sense in this example.

You will see that each of these functions is defined in very similar ways but with varying combinations of **Notify** and **Set Next Stage** commands. Other logic is included to control when each process is triggered. Most importantly, notice that for each function, the Submit Data command must be included at the end as, without that, notifications would not be sent, and any stage change would not happen.

Please note that the above should work if you set it up from the start. However, if you are adding this function retrospectively, the important dummy notification won't happen in instances that are already started. The Admin user won't get to see the Admin button as the Admin role will not have been assigned to them. In such cases, please check the logic on the 'Page 1 – Page is opened' event, which will show the Admin button if a specific Licensed user is accessing the request from within the portal. You will also need to Map Versions after the modification is made for it to be applied to existing instances.

For more detail on version mapping, please check the online help guide.

Please also note that if you would like to use the example in your system, a small amount of set-up work is required first.

1. You must create an Admin position or user group in your account.
2. You will need to assign a user to that position or group, and that user should have a Full or Basic license in your system.
3. In design mode and the workflow properties, you will need to re-link the Admin Role to the new 'Admin position you have just created.