PM 47

How to…redirect individual tasks/workflow

Purpose:

This guide will show you how to redirect your workflow tasks within the **People Manager** in Your HR.

Important: **you must only use redirection if the person you need to redirect to has People Manager access as tasks cannot be actioned without this!**

Logging in to Your HR:

To log into Your HR, please refer to the **How to...Log in to Your HR Guide (ESS 1).** After login you will be presented with the **People Manager Homepage**

What are workflow tasks and workflow redirection?

- Any actions, e.g. requests to book holiday, have a workflow process in the background that sends emails to yourself, to the employee and any other relevant teams. These actions appear as tasks in your To Do List on your People Manager Homepage (See *How to...understand your People Manager Homepage*). In Your HR there is a way of redirecting ALL your tasks for ALL of your direct reports when you know you will not be at work for any period of time, for example when you are on Annual or Sick Leave. This is called **Workflow Redirection.**

- A manager can also redirect individual tasks from their Your HR To Do list to a manager of equal or higher status. This can be done by selecting the tasks individually and choosing the option to redirect. This is known as **Task Redirection.**

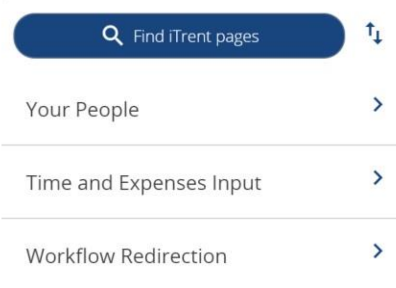
- There is no automatic task escalation to your reporting/line manager if your tasks are not completed within a certain timeframe so you must remember to reroute your workflow if you go on leave.

- As redirection will grant access to approve claims and employee requested changes in ESS it is not appropriate for a manager to redirect work to someone within their line management. Therefore managers should only redirect upwards or to a colleague at a similar level who is not within their reporting line.

- If the person you redirect to does not have People Manager access, they cannot action the tasks!

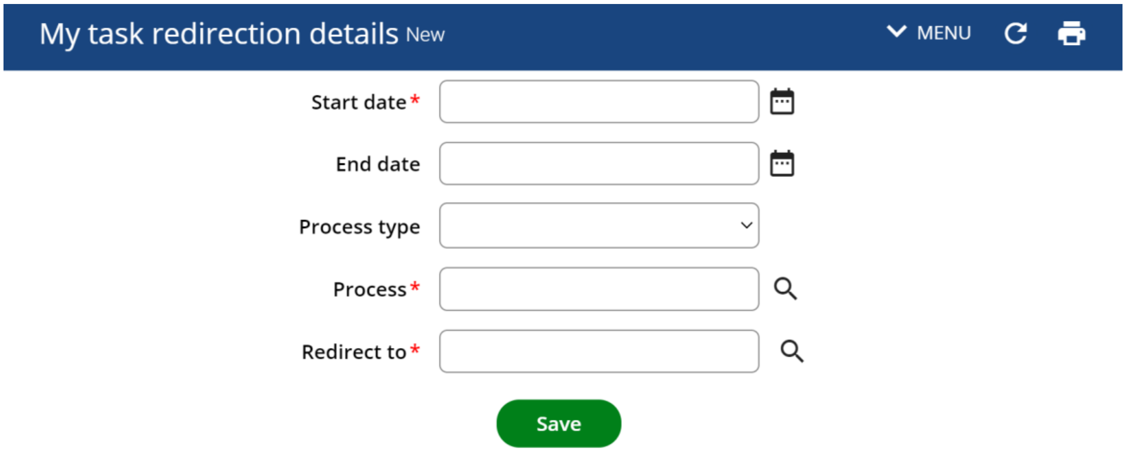
How to redirect your workflow tasks

- Click on **Workflow Redirection**



Any previous (active and end dated) redirections will be shown in the left hand navigation:

- Click on ‘My Task Redirection’ from the links. If a previous end dated redirection exists, click on the NEW button. Otherwise, a blank ‘My task redirection’ screen will appear:



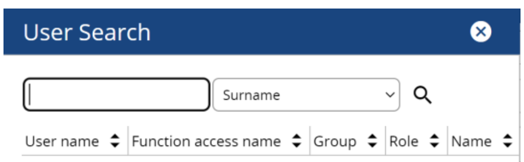
- Mandatory fields for completion have a red star next to their field name.

- The Task Redirection screen requires you to enter the **start date** you want the redirection to be effective from, and you can also enter the **end date** you wish the tasks to stop being redirected. You do not have to enter an end date if there is not one or if it is unknown at this stage. If you do enter an end date, the task redirections will automatically cease from the following day and revert to your own ‘to do list’.

- For **Process Type**, you need to choose the default option **redirect all**.

- You then need to choose whom you wish to redirect your workflow to. This must be your reporting manager or their manager. You cannot redirect to someone who reports to you or is at the same level as you within your service. This is because the employee must sit within the reporting structure of the redirected.

- To select this person, you need to click on the magnifying glass icon to perform a search.



- You can search by **Forename, Surname** or **Username.** You must ensure you select the correct person to avoid workflows being sent to the wrong person! If you hover over the user a pop up box will appear with their name allowing you to ascertain if you have the correct person

- Ensure that the person has a Role for **WCC – People Manager**. If they do not they cannot action the tasks!

User name : **NGAR**

Role : **WCC - PEOPLE MANAGER**

Name : **Mr Test Manager**

Personal ref. : **76717**

Web recruitment user name : **NGAR**

- Once you have selected the person, you need to click **Save.**

- Your workflow redirection will now be saved for **all** of your direct reports.

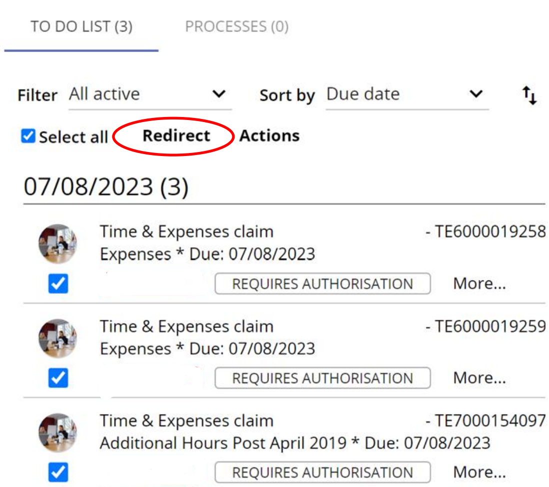
- Should you wish to amend this redirection when this is set up i.e. to end date it following your return to work from a long term absence, follow the same steps to access the task redirection page. You can then amend the details as required and click **Save** any changes.

- If you need to end a workflow redirection i.e. it is no longer required, enter an End date against the redirection and click on the Save button. Please note any workflows that have already been sent will not be automatically removed.

How to Redirect individual tasks (Task Redirection)

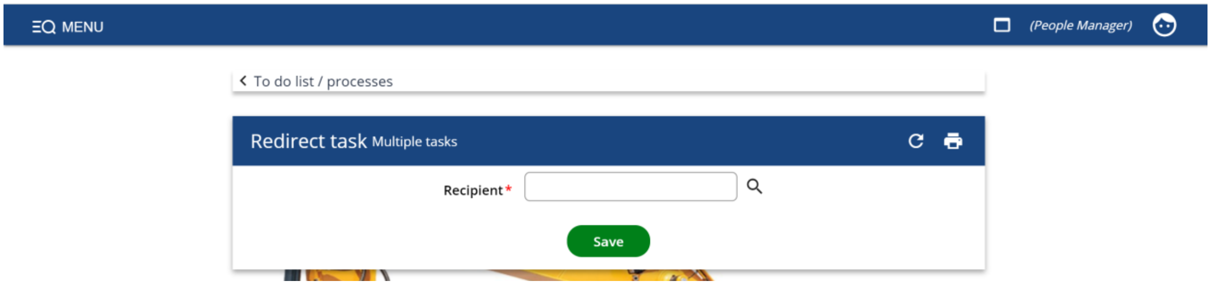
- Click on your **"My to do list"** from the home dashboard.

- You will then see on your screen your actions that you can choose from to redirect. You can either select all or click individually the action(s) you require to be redirected.

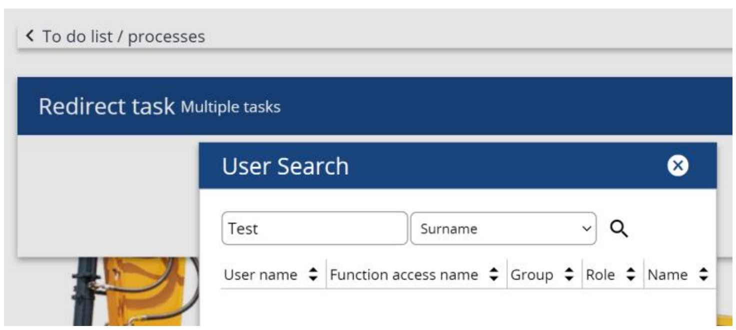


- Once you have selected which actions you want redirecting, you will then need to click **"Redirect"**, which is above the actions that are displayed, to get to the next page.

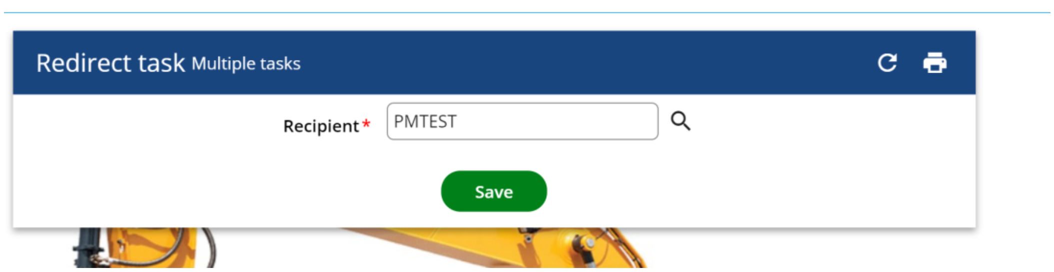
- Once you have clicked **“Redirect”,** you will be shown the below screen:



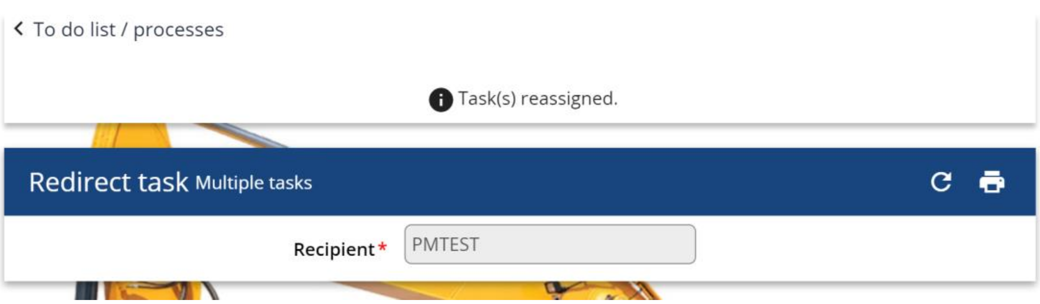
- Click on the magnifying glass to be able to search for the employee you want to redirect the chosen tasks to.
- It will bring up the search function where you will be able to search for the required manager of equal or higher status:



- Click on the employee you require, and this will populate the **Recipient** field:



- Click **“Save”** and this will confirm that your chosen individual tasks have been redirected to your chosen employee:



For further information or support please refer to Your HR on the Intranet or please raise a request through the HR Service Centre Desk

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