



# Standard System Processes

Author: Abbi Melville  
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## Standard System Emails

<u>Process</u>	<u>Initiated</u>	<u>Users</u>
Welcome to people	Company signup	Admin who signed up for a new site
Welcome to people	'Send Welcome Email' button pressed	All users
Welcome to people	New employee added	Employee
Reset People Login Credentials	Requesting password reset from 'Forgot Your Password' button	Employee
Somebody Just Thanked You	User has given you thanks	Employee who has been thanked
New News Alert	News posted with 'Alert Employees via Email' ticked	Employees with access to view post
News Update	News post edited	Employees with access to view post
Case Update	Case updated	Consultants only
A document requires your signature	Document added to employee record with signature required	Employee
Signed Document	Employee signs document	Notifications Admin and employee
Your unique People URL	Requested company URL	Requester
Email Address Changed	Change in email address (or resending welcome email)	Employee
Email Inbox Success Response	When admin uses Email Inbox feature	Admin
Email Inbox Failure Response	When admin uses Email Inbox feature	Admin
Flexible Benefit Enrolment	Benefit is created or date edited	Those who are eligible
Daily recap email	Admin Daily Recap	Admins
Weekly recap email	Manager/Employee Daily recap	Manager/Employee

## Planner

<u>Process</u>	<u>Initiated</u>	<u>Users</u>
Holiday request	Employee adds holiday	Manager/Approver
Holiday Request Amendment	Employee edits holiday	Manager/Approver
Holiday Request Withdrawn	Employee deletes holiday	Manager/Approver
Your holiday request has been approved	Holiday approved	Employee
Your holiday request has been declined	Holiday rejected	Employee
Event Request	Employee adds Other Event	Manager
Event Request Amendment	Employee edits Other Event	Manager
Event Request Withdrawn	Employee deletes Other Event	Manager/Approver
Your event request has been approved	Other Event Approved	Employee
Your event request has been declined	Other Event Rejected	Employee
Timesheet Submitted	Employee adds timesheet	Manager
Your timesheet request has been approved	Timesheet approved	Employee
Your timesheet request has been declined	Timesheet rejected	Employee
Assignment Request	Employee adds assignment	Manager
Assignment Request Approved	Assignment approved	Employee
Assignment Request Declined	Assignment rejected	Employee
A recent holiday requires a return to work form	Employee comes back from holiday that required return to work form	Employee/Manager
A recent absence requires a return to work form	Employee comes back from sickness that required return to work form	Employee/Manager
Time Off In Lieu	TOIL balance is updated	Employee

## Performance/Goals

<u>Process</u>	<u>Initiated</u>	<u>Users</u>
It's Time to Assess Yourself	'Send Email' button pushed by admin in Performance review setting	Employee assigned to review
[[Employee Name]]'s Self-Assessment is Ready	Employee shares review	Manager
[[Employee Name]]'s Self-Assessment Needs More Time	Employee unshared review	Manager
Your Performance Review is Ready	Manager shares review	Employee
[[ManagerName]] is Editing Your Performance Review	Manager unshared review	Employee
Invitation to Review Your Colleague	Admin or manager has invited employee to submit 360 for colleague	Employee who was invited
360 Degree Feedback has been Submitted	Employee has completed 360 feedback	Manager (of the employee whose performance review it is)
Invite for 360 Degree Feedback Declined	Employee declined to submit 360 feedback	Employee who was invited
New Goal Assigned	Admin creates a goal for employee	Employee
New Goal Assigned	Manager creates a goal for employee	Employee
New Goal Created	Employee creates a goal	Manager
New Goal Created	Admin creates a goal for employee	Manager
You've Completed a Goal	Employee completes goal	Employee
Goal Completed	Employee completes goal	Manager

## ATS (Applicant Tracking System)

<u>Process</u>	<u>Initiated</u>	<u>Users</u>
New Applicant	New applicant applied or added	Those set up for New Applicant notification
You have been nominated as a hiring lead	User added as a hiring lead	New hiring lead
Weekly ATS Recap	Weekly ATS report	(If selected) Admins, hiring managers & hiring leads
Notification from ATS	Notification of movement in pipeline stages	Those selected within Vacancy Notifications
Your approval is requested to make a job offer	Job offer request	Approver
Applicant Email	Acknowledgment email when applying	Applicant
Your approval is requested to start hiring	Vacancy request	Vacancy Approver
Vacancy Request Approved	Approved Vacancy request	Vacancy creator
Vacancy Request Rejected	Approver rejected vacancy request	Vacancy creator
Offer Request Approved	Approved offer request	Requester
Offer Request Rejected	Rejected offer request	Requester
Various email templates	When sent by user within ATS	Those specified to receive

## Requests (Expense & logbook)

<u>Process</u>	<u>Initiated</u>	<u>Users</u>
Expense Approval Request	Employee submitted an expense	Manager/Approver
Expense Request Approved	Expense has been approved	Employee
Expense Request Rejected	Expense has been rejected	Employee
<b><u>If logbook is set up for requests</u></b>		
[LogbookName]Approval Request	Add/Update/Delete Logbook - By Employee	Approver
Approved Approval Request	Logbook approved	Requester
Approval Request	(If logbook is set up for requests) Logbook Rejected	Requester