Use dynamic groups for vacation leave

English

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Introduction

This is a guide on how you can manage your staff and message mailings to your staff. By using this simple solution with Bosbec Workflow Builder, you can automatically send your message mailings to your available team members, based on whether the staff member are operative or not.

This solution will let your team schedule when they return from vacation leave and continue receiving messages from your organization. Although, you may also send out a prioritized message, e.g., for incident management or other vital information to your entire staff regardless of their availability status.

Requirements

To make the workflow operative, some pre-requesites are necessary. The workflow changes which are requireed are listed below.

- Create a group containing your entire staff or the individuals you wish to administrate. Use the group ID for that group and paste it in the "Group id"-field in "job_1". Replace the template-group connected to "job_4" and "job_12" with your newly created group.
- Create a dynamic group with the tag "available" and replace the template-group which is connected to "job_11".

Set up the workflow

One of the main reasons to use the workflow builder for your IT solutions is that it gives you the ability to modify the workflow as needs and requirements change quickly. This chapter will provide some pointers where you can make changes to the workflow template to customize the solution to your organization's needs.
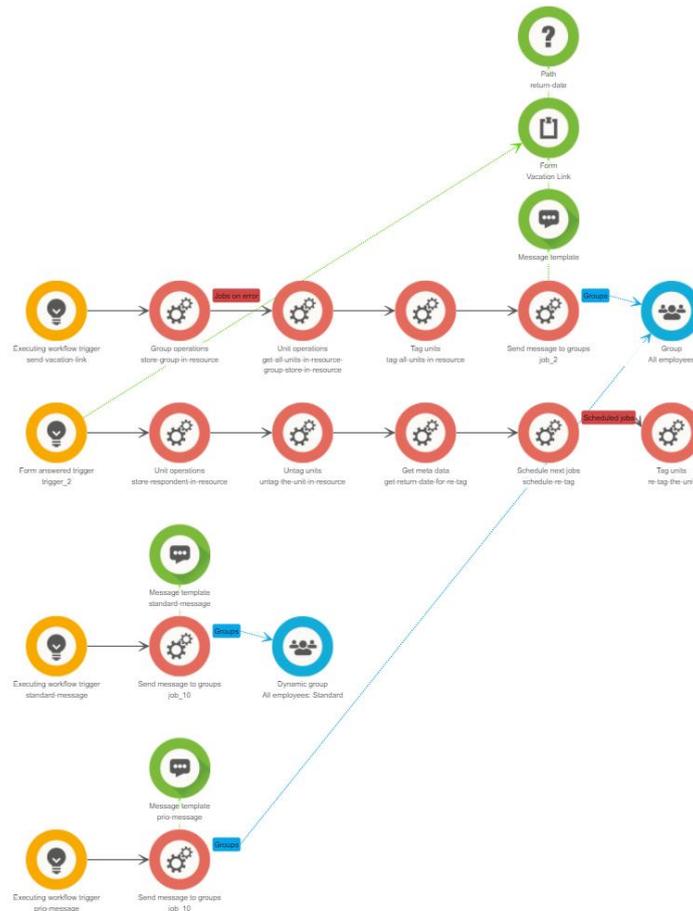

Figure 1: Complete workflow template

This configuration has already been built and serves as a Workflow template. You only need to import the template to your workflow.

1. Open "Edit" in the top left corner of the Workflow Builder.
2. Scroll down to "Workflow Library" and open it.
3. Here you will see the Workflow Library of already built code snippets and templates to streamline your work process. Expand the "Snippets"-folder.
4. Select "Vacation Tag" to import it to the workflow canvas.

Workflow anatomy

This section will present how the workflow operates and the structure of the workflow. The workflow can be divided into four components, each responsible for a specific task. The de-composed parts of the workflow are listed below.

Send out a registration form to your team

This part of the workflow will let you create a message send-out to your team, which consists of the registration form. The workflow will use **dynamic groups** and **tags** to send out messages to your team, depending on if they are on vacation leave. The process starts by tagging your team with the tag *standard-recipient*, informing the workflow that every staff member is an allowed recipient to your standard message mailings.
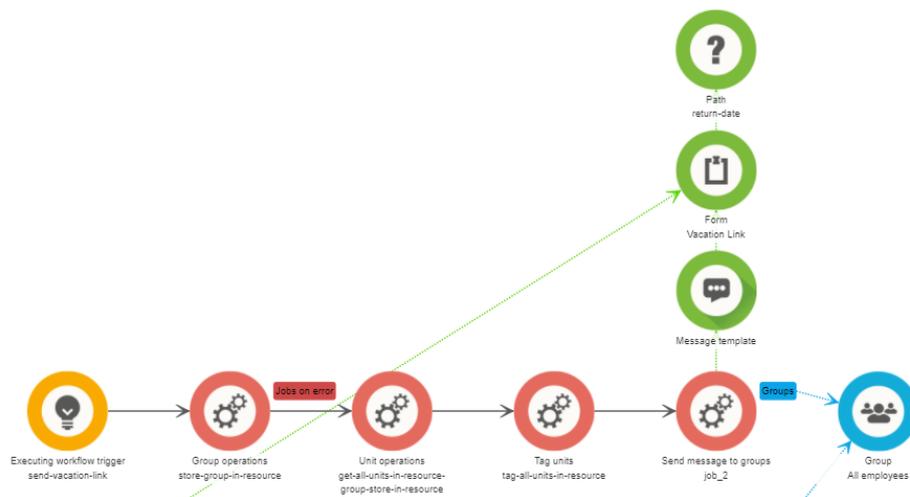

Figure 2: Send out a registration form to your team

The *Group operations*-job will store the group of your choice in the workflow resource. The *Unit operations*-job will extract all units in the resource group and store them in as available resources. The *Tag units*-job will be able to tag all units in your resources with the tag *standard-recipient*-tag.

Finally, all units have been tagged and will be able to receive standard messages. The registration form is sent to your team in a message that can be configured in the *Message template*-job.

Member register for temporary pause of mailing

When the form has been submitted, a second trigger will react and initiate the second fragment of the workflow. The staff member who has submitted the form is stored as a resource in the *Unit operations*-job. Since the unit needs to be un-tagged, it needs to be available as a resource. Workflow resources can be a collection of groups, units, and other resources that you wish to process. In this case, un-tag, to not let them receive a standard message in your mailings. Then as the first part of the workflow, the unit gets untagged.
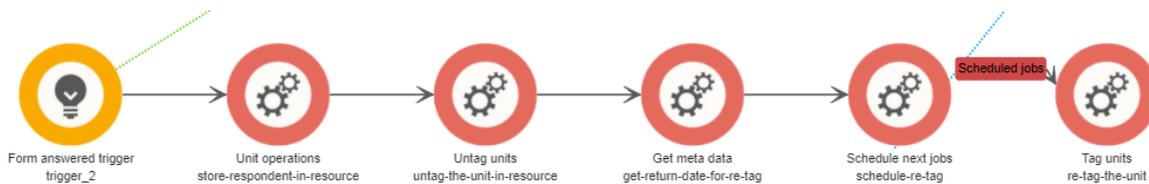
Figure 3: A staff member register for vacation leave and the unit gets un-tag for the specified amount of time

The *Get meta data*-job will extract information in the form which was submitted by the staff member. This form can be configured, or you can choose your form. The template form is presented in Figure 3. The date which is submitted is then set as a scheduling variable, so when the staff member is back from absence, the *Schedule next jobs*-job will re-tag the unit. This process is possible since the unit remains a workflow resource, and the workflow process is still active until the last job has been executed.

Figure 4: Form for registration vacation leave

Send out a standard message to your team

When sending out a standard message, only the units in the dynamic group will receive messages from the mailings. This fragment consists of only one trigger and one job. Connected to the *Send message to groups*-job are the dynamic group and a message template that you can configure. The dynamic group consists of all units with the tag *standard-recipient*; thus, any staff members who have registered for vacation leave will have no tag and not be a part of the dynamic group.
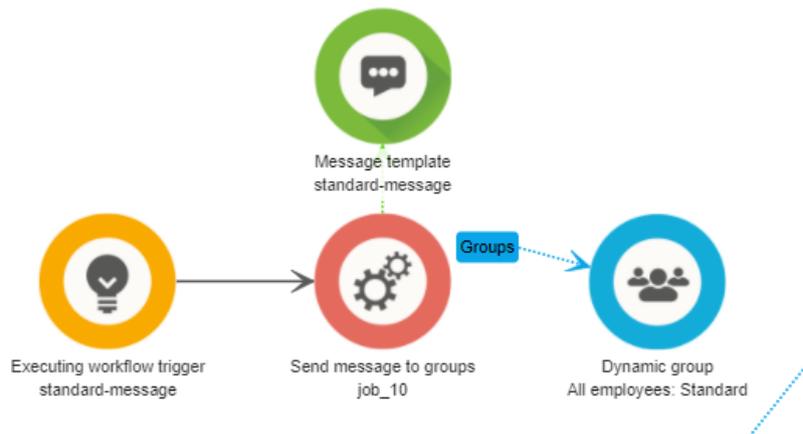

Figure 5: Send out your messages to the dynamic group.

Send out a prioritized message to your team

Sometimes you might need to alert or notify your entire staff, regardless of their vacation leave. In this case, the workflow can send out a message to all your staff members, without paying attention to the tags. Using the *Send message to* groups-job and connecting the standard group, you send messages to your entire team. The message can be configured and customized in the *Message template*-job.
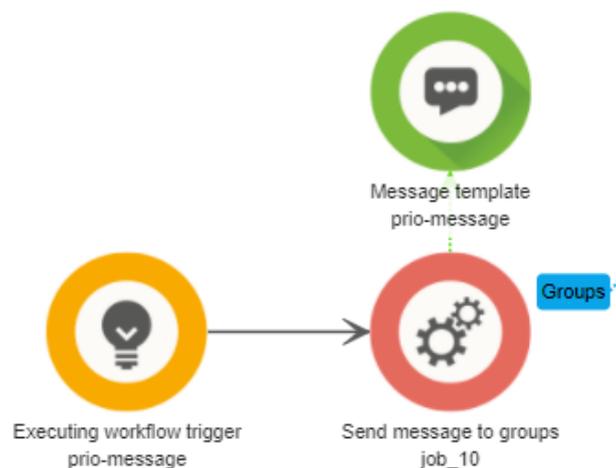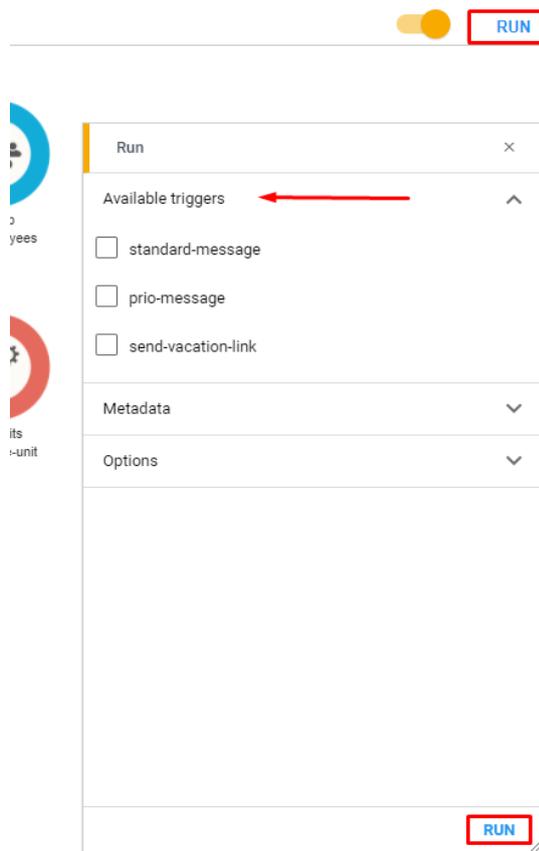

Figure 6: Send out a prioritized message to your entire staff.

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Execute the workflow

To execute the workflow's different components, click *"Run,"* located in the top right corner of the Workflow Builder. Then select the trigger you wish to execute.

standard-message: Will send out a standard message to your staff, members on vacation leave will not receive a message.

prio-message: Will send out a prioritized message to your entire staff.

send-vacation-link: The first step of the process, which will tag all your units making them available for standard message send outs and give them the form for vacation leave.

Further reading

Additional documentation and information about Bosbec integration and funcitonality can be found at https://help.bosbec.io/.