Configuring the Out of Office/Delegate Feature

When users are out of office, Onit allows them to select a delegate to take over their responsibilities while they're out. Onit's out of office/delegate feature gives users the ability to select a peer who will assume their approval and viewing rights until they return. Delegates will be granted access to all Records of the original user, including potentially sensitive records.

This tutorial will cover how to implement the out of office/delegate feature in your Onit environment. At the end of this tutorial any user will be able to select another user to assume their responsibilities. Additionally, administrators may assign delegates for users.

The out of office/delegate feature transfers approval rights through one crucial Action, the **Set Delegates for User** Action. This action will link and unlink the delegate to and from the out of office user.

Once a delegate has been chosen, a Business Rule named **Add Delegate** will check via Condition to make sure the out of office/delegate feature is enabled. If the Condition is satisfied, Onit will grant view and approval rights to the delegate through the **Set Delegates for User** Action. When a delegate needs to be removed, a Business Rule named **Remove Delegate** will check via Condition that the out of office/delegate feature is disabled, then remove the delegate through the **Remove Delegated User** Action.

In order to complete this tutorial, you will need:

- Access to the User Preferences Provider App in your environment. This App is often named **User Profiles.**
- An understanding of security settings in your environment.

> ℹ️ The out of office/delegate feature allows delegates to view and approve Records, however, they will not receive emails meant for the out of office user.

Create Conditions

You will be creating all of the following Conditions, Actions, and Business Rules within your User Preferences Provider App.

1. Navigate to the **Conditions** node.

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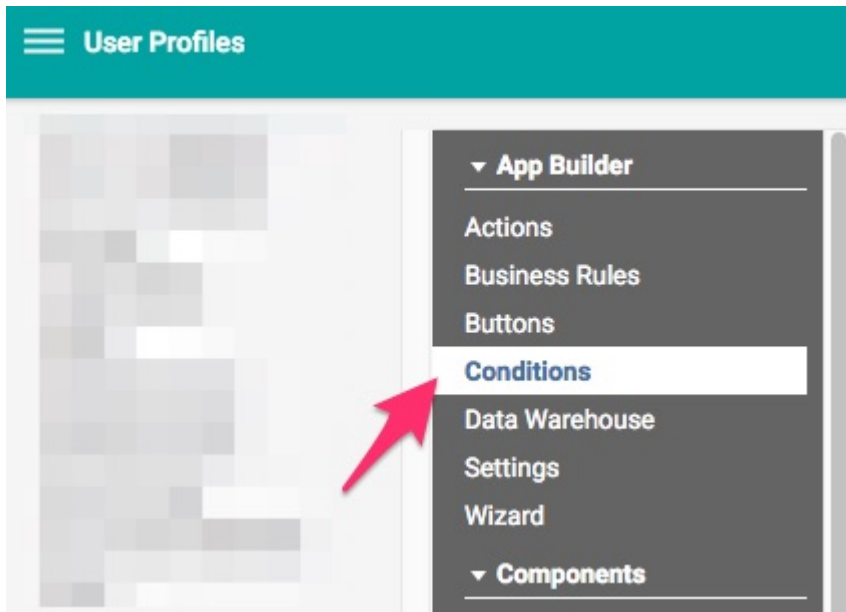
2. Create a condition named **Delegate is Enabled.**
   - In the **Condition** property enter `{% if out_of_office == 'Yes' %}true{% endif %}` This Liquid will evaluate to **true** when the out of office/delegate feature is *enabled*.
   - Click **Save** to save your condition.

Condition

Name *	Delegate is Enabled
Description	
Condition * ⓘ	{% if out_of_office == 'Yes' %}true{% endif %}

[If] [Assign] [For] [Editor]

3. Create a second condition named **Delegate is enabled and Start Day is Today**.
   - In the **Condition** property enter `{% if out_of_office_start_date != blank %}{% assign a = now | to_date %}{% assign start = out_of_office_start_date | to_date%}{% if out_of_office == 'Yes' and out_of_office_start_date == a %}true{% endif %}{% endif %}` . This Liquid ensures that the out of office/delegate feature is *enabled* and the start date is the current date.
   - Click **Save** to save your condition.

Condition

Name *	Delegate is Enabled and Start Day is Today
Description	

Condition * ⓘ

```
{% if out_of_office_start_date != blank %}
{% assign a = now | to_date %}
{% assign start = out_of_office_start_date | to_date%}
{% if out_of_office == 'Yes' and out_of_office_start_date == a %}true{% endif %}
{% endif %}
```

[If] [Assign] [For]   [Editor]

4. Create a another condition named **Out of Office has been set to No**.
   - In the **Condition** property enter `{% for change in atom.changed_values %}{% if change.field_name == 'p_out_of_office' and change.current != "Yes" %}true{% endif %}{% endfor %}` . This Liquid will start the removal process when the out of office period is over.
   - Click **Save** to save your condition.

Condition

Name *	Out of Office has been set to No
Description	

Condition * ⓘ

```
{% for change in atom.changed_values %}
{% if change.field_name == 'p_out_of_office' and change.current != "Yes" %}true{% endif %}
{% endfor %}
```

[If] [Assign] [For]   [Editor]

Create Actions

1. Navigate to the **Actions** node in the App's Advanced Designer.
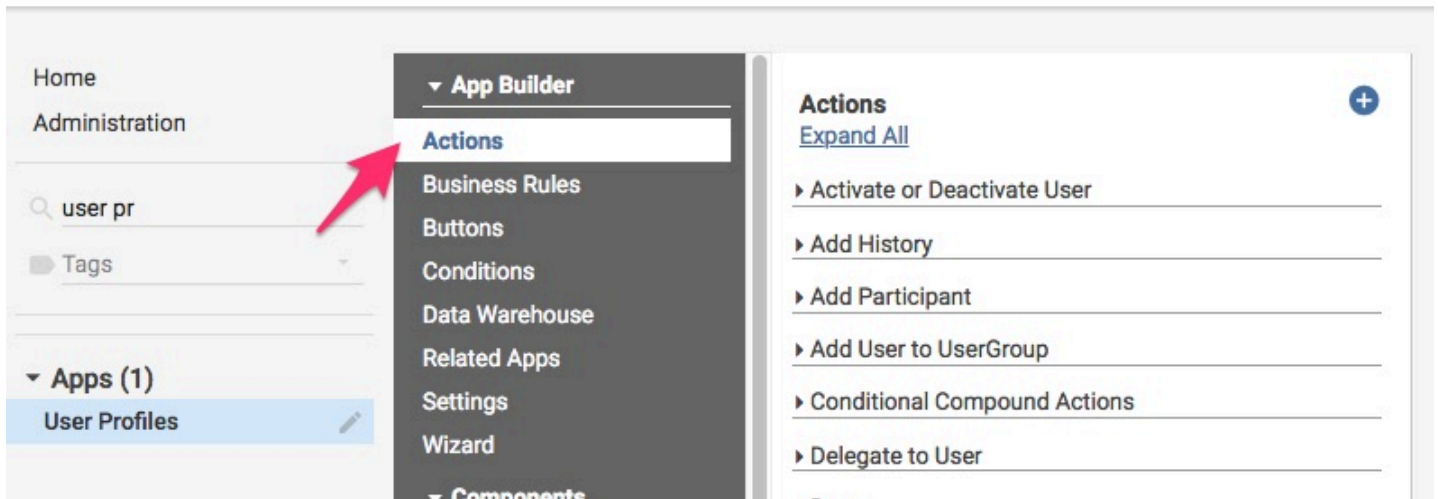
2. Create a **Set Delegates for User** Action named **Assign Delegate**. This Action will assign Out of Office delegate(s) to the user. When configuring this Action:
   - In the **Email of Delegator** property, enter a Liquid expression that will evaluate to the email address of the user who will be out of the office. In many cases this will be: `{{name}}` .
   - In **Email of Delegate** enter a Liquid expression that will evaluate to the email address(es) of the chosen delegate. In many cases this will be: `{{out_of_office_delegate.name}}` .
   - Click **Ok** to save your Action.

3. Create a **Conditional Compound Action** named **Remove past delegates and assign current**. This Action will remove any existing delegates and assign the new delegate(s). When configuring this Action:

   - In the **Condition** property, choose **Delegate is Enabled.**
   - In **Actions**, choose **Assign / Remove Delegate**.
   - Click **Save** to save your Action.

Edit Action

Conditional Compound Actions

Name *   Remove past delegates and assign current

Description

Condition   Delegate is Enabled

Actions   Assign / Remove Delegate ⊗

Run In Background   ☐

Enabled   ☑

Action to execute in case of background failure

4. Create a **Remove Delegated User Action** named **Remove Delegate**. This will remove the Out of Office delegate from the user when Out of Office has been set to No.

- In **user_email** write {{name}}
- Click **Save** to save your Action.

Remove Delegated User

Name *   Remove Delegate

Description

User Email *   {{name}}

Used In

Business Rules: Remove delegate
Conditional Compound Actions:
Looped Actions:
Buttons:

5. Create an **Update Transaction** Action named **Clear Out of Office Fields**. This Action will clear the Out of Office Fields when Out of Office is set to No.

- Under **Field Updates** choose:
  - Out of Office Start Date
  - Out of Office End Date
  - Out of Office Delegate

- Click **Save** to save your Action.

Update Transaction

Name *	Clear Out Of Office Fields
Description	
Shared Liquid ⓘ	[Editor]
Params Liquid	[Editor]

Field Updates

Field *	Liquid		
Out Of Office Start Date (out_of_office_start_date) ▾		Editor	🗑
Out Of Office End Date (out_of_office_end_date) ▾		Editor	🗑
Out Of Office Delegate (out_of_office_delegate) ▾		Editor	🗑

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Create Business Rules

1. Navigate to the **Business Rules** node in the Advanced Designer.
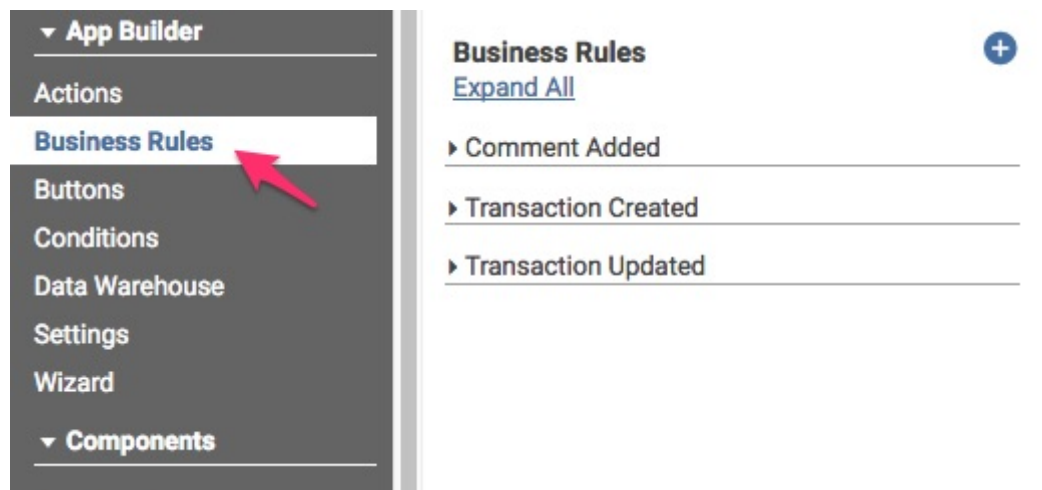
2. Create a new **Transaction Updated** Business Rule named **Add Delegate**.
    *   Choose **Delegate is Enabled and Start Day is Today** from the **Condition** dropdown.
    *   Choose **Remove past delegates and assign current** from the **Action** dropdown.
    *   Click OK to save your Business Rule.

Transaction Updated

Name *	Add delegate
Description	
Enabled	☑
Condition	delegate enabled start date today ▾ ✏ +
Actions	Remove past delegates and assign current ⊗ ✏ +
	▾
Comment	Provide a brief description of the change you made (optional)

Copy   Cancel   Delete   **Save**

3. Create a new **Transaction Updated** Business Rule named **Remove Delegate**.
   - Choose **Out of Office has been set to No** from the **Condition** dropdown.
   - Choose **Remove Delegate** and **Clear Out of Office Fields** from the **Action** dropdown.
   - Click OK to save your Business Rule.

Transaction Updated

Name *	Remove delegate
Description	
Enabled	☑
Condition	out of office set to no ▾ ✏ +
Actions	Remove Delegate ⊗ Clear Out Of Office Fields ⊗ ✏ +
	▾
Comment	Provide a brief description of the change you made (optional)

Copy   Cancel   Delete   **Save**

Create Fields

> ❗ When creating the Fields outlined below the field names (e.g., **enable_out_of_office**) must exactly match, otherwise the Conditions set up earlier will not work.

1. Navigate to the Advanced Designer page for your User Preferences Provider App and open the Wizard.
2. Click **Next** until you reach the **Fields** tab.

3. Create a Field named **out_of_office** with a **Type** of **Combo.** This combo will allow users to enable the out of office/delegate feature.
   • Under **Values**, enter `Yes,No`.

4. Create a Field named **out_of_office_start_date** with a **Type** of **Date**. This Field will track the start date of the out of office period.
   • Set the **Hidden condition** to [out_of_office] != 'Yes'. This Liquid will hide the **out_of_office_start_date** Field until the out of office/delegate feature is enabled.
   • Check the **Required** box and the **Show on Dashboard** box.

5. Create a Field named **out_of_office_end_date** with a **Type** of **Date**. This Field will track the end date of the out of office period.
   • Set the **Hidden condition** to [out_of_office] != 'Yes'. This Liquid will hide the **out_of_office_end_date** Field until the out of office/delegate feature is enabled.
   • Check the **Show on Dashboard** box.

6. Create a Field named **out_of_office_delegate** with a **Type** of **BelongsTo**. This Field relates the User Preferences Provider App to itself in order to give the user access to a dropdown list of other users in the company.
   - Set the **Hidden condition** to [out_of_office] != 'Yes'. This Liquid will hide the **out_of_office_delegate** Field until the out of office/delegate feature is enabled.
   - Check the **Required** box.
   - Set the **Target App** to your User Preferences Provider, in this tutorial it is the **User Profiles** App.

Test Your Out of Office Delegate Feature

You're done! Test the feature by designating a delegate to ensure they can view and approve the correct Records. You can test your out of office/delegate feature by doing the following:

1. Pick two users to test this out on: an Approver, Jonah, and a Delegate, Emily. For the Approver, make sure you find one business Record where the Approver can see the Record and the Delegate cannot, here that Record will be Jonah Private Matter 3.

	Jonah	Administration
	Emily	Regular Users

Jonah's Matters:

My Recent Activity ▾   All Transactions ▾ | Save View

Matter Name	Matter Number	Matter Manage…	Matter Type	Brief Matter Description	Start	Last Acti…
Jonah Matter 1	2018-57437	Jonah	Alleged Non-Compliance		Aug 1, 2018 11:19 AM	Aug 1, 2018 11:19 AM
Jonah Matter 2	2018-57438	Jonah	Credit		Aug 1, 2018 11:19 AM	Aug 1, 2018 11:19 AM
Jonah Private Matter 3	2018-57439	Jonah	Invention Disclosures		Aug 1, 2018 11:20 AM	Aug 1, 2018 11:20 AM

Emily's Matters:

My Recent Activity ▾   All Transactions ▾ | Save View

Matter Name	Matter Number	Matter Manage…	Matter Type	Brief Matter Description	Start	Last Acti…
Emily Matter 1	2018-57440	Emily	Divestiture		Aug 1, 2018 11:22 AM	Aug 1, 2018 11:22 AM
Emily Private Matter 2	2018-57441	Emily	Export Compliance		Aug 1, 2018 11:22 AM	Aug 1, 2018 11:22 AM

2. Open the Approver's User Preference Provider Record and mark the user as out of office. Choose the Delegate user as the delegate and the start date (the end date is optional).

Details | Corporate User Details | Security Groups (0) | Matters (1)

User Name *

User Email *

Add To Matter Manager List? * ○ Yes   ⦿ No

Group *   Regular Users

USD

Out Of Office * ⦿ Yes   ○ No
Out Of Office Start Date *   5/14/2019
Out Of Office End Date   M/D/YYYY
Out Of Office Delegate *

Cancel   Update

ℹ Once the delegated user logins in, there will be an asterisk by their username signifying they are a delegate. When the username is hovered over there will be a tooltip with all the users this delegate has view and approval rights for.

➕   Emily* ▾

2
asks

👤   0
My Timekeeper Approvals

View Details