



Workflow Scenario Example 5

Type: Basic New Record Workflow
Department: Sales (Customer)

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Learning Objectives

To-Do Group Template

To-Dos can be defined as group tasks (To-Do Group) within this template.

Field Modification

Field values can be changed automatically depending on the status of a Workflow, To-Dos or the To-Do Groups.

Team Responsibility

It is in the option to assign a To-Do either to a particular person or to an entire team.

Document Group

The system allows to subordinate several document types within one Document Group (e.g. document types such as "Item Specification" and "Quality Log" can be part of a Document Group e.g. named "Item Documents").

Document Type

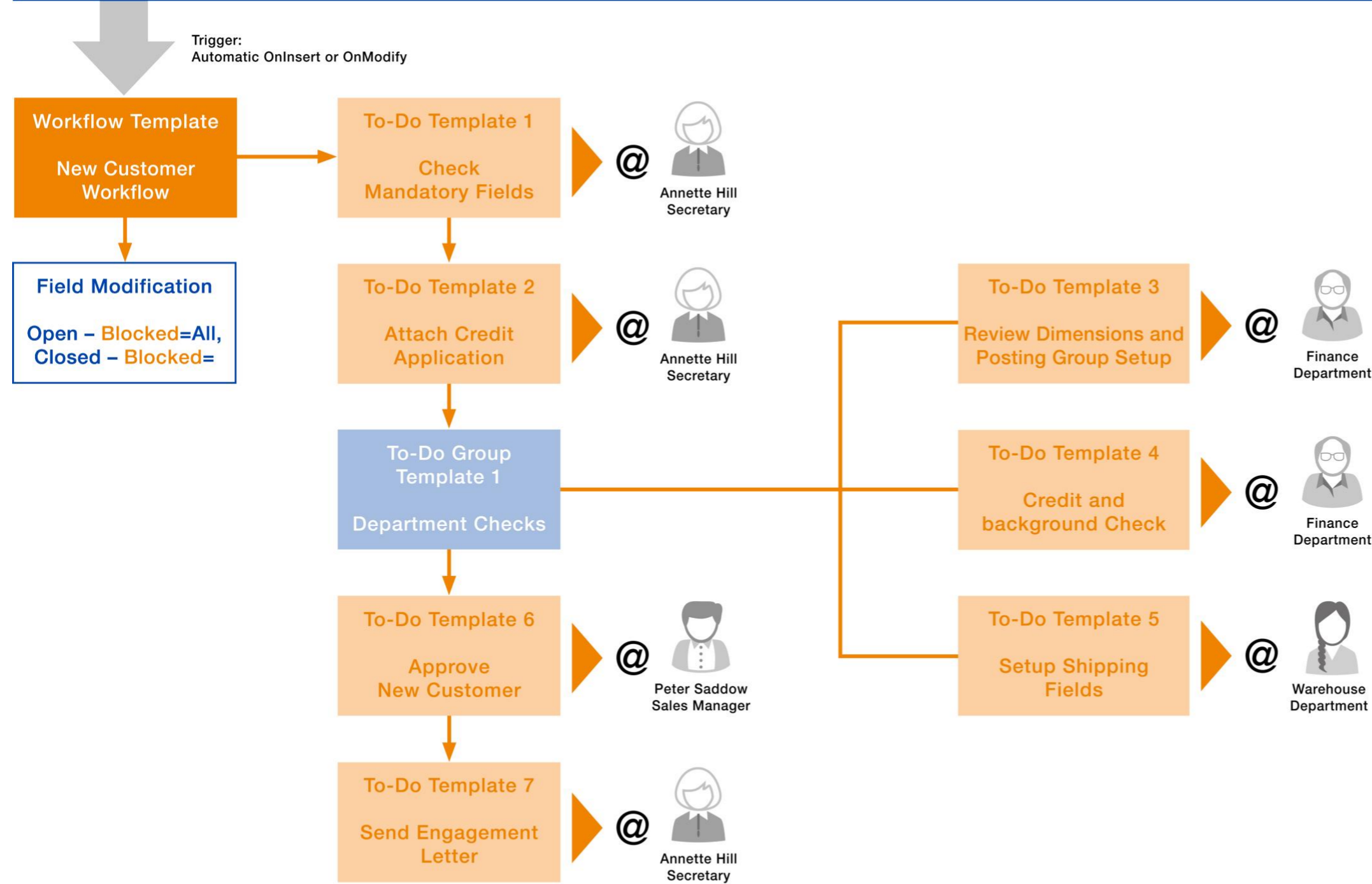
The document for attachment is specified in the Document Type and is matched to a Data Table (Reference Type). Furthermore, the default file names are set to automate the location of a document.

Business Process "New Costumer"

When a new customer is created, Mandatory Fields will be checked and the Credit Contract attached by the secretary. Subsequently, approvals by various departments will take place: The setup of the Dimension and Posting Group as well as the creditworthiness of the new costumer are verified by the Finance Department. Furthermore, the Warehouse Department arranges all steps which are necessary for shipping. Once this has been done, the new costumer needs to be confirmed by an employee before the contract can be sent out by the secretary.

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All Customers



agilesWorkflow Setup

Reference Type

No.: 18 (Customer)
 Editing Page ID: 21 (Customer Card)
 Buffer Time on Function Call Server: 30 Seconds
 Automatic Workflows: Yes
 Default Workflow Template Code: WF050
 Keyword Definitions Line 1
 Table ID: 18 (Customer)
 Field ID: 1 (No.)
 Tick all Use Fields
 Keyword Definitions Line 2
 Table ID: 18 (Customer)
 Field ID: 2 (Name)
 Tick All Use Fields

To-Do Template

To-Do Template 1	Reference Type No: 18 (Customer) Code: WF050-TD010 Description: Check Mandatory Fields
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF050-C010

Condition

Table ID: 18 (Customer)
Code: WF050-C010
Description: Check Mandatory Fields
Type: Field Examination
All Condition Lines
 Active: Yes
 Type: Field
 Table ID: 18 (Customer)
 Process Time ID: 21 (Customer Card)
Condition Line 1
 Field ID: 2 (Name)
 Filter: <>
Condition Line 2
 Field ID: 21 (Customer Posting Group)
 Filter: <>
Condition Line 3
 Field ID: 88 (Gen. Bus. Posting Group)
 Filter: <>
Condition Line 4
 Field ID: 110 (VAT. Bus. Posting Group)
 Filter: <>
Condition Line 5
 Field ID: 20 (Credit Limit (LCY))
 Filter: >0

To-Do Template 2	Reference Type No: 18 (Customer) Code: WF050-TD020 Description: Attach Credit Application
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD010 Duration Date Calculation: 1D
WHAT	Type: Document Storage Att. Document Type Code : Credit application

Document Group

Code: CONTRACT
Description: Contracts
Directory Path Name: C:\Temp\
Insert Record Link Yes

File Filter:

Display Order: 1
File Filter Code: PDF
File Filter
Code: PDF
Description: PDF
Filter: *PDF

Document Type

Reference Type: 18 (Customer)
Code: CREDIT APPLICATION
Description: Credit Application
Document Group: CONTRACT
Table Join (automatic request)
Table ID: 5128007 (Workflow)
Table ID to join: 18 (Customer)
Table Join Line 1
Field ID: 1 (No.)
Value Type: Field
Value: 26 (Assigned To No.)

To-Do Template 3	Reference Type No: 18 (Customer) Code: WF050-TD030 Description: Review Dimensions and Posting Group Setup
WHO	Team Code: FINANCE
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 4	Reference Type No: 18 (Customer) Code: WF050-TD040 Description: Credit and Background Check
WHO	Team Code: ACCOUNTS
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 5	Reference Type No: 18 (Customer) Code: WF050-TD050 Description: Setup Shipping Fields
WHO	Team Code: Warehouse
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Group Template

Reference Type No.: 18 (Customer)
Code: WF050-TG010
Description: Examination by Departments
To-Do Group Line 1
Type: To-Do
Code: WF050-TD030
To-Do Group Line 2
Type: To-Do
Code: WF050-TD040
To-Do Group Line 3
Type: To-Do
Code: WF050-TD050

To-Do Template 6	Reference Type No.: 18 (Customer) Code: WF050-TD060 Description: Approve New Customer
WHO	Employee Code: PS
WHY	No Activation
WHEN	Source Type: To-Do Group Source Code: WF050-TDG010 Duration Date Calculation: 2D Critical Date Calculation:-1D
WHAT	Type: Manual Completion

To-Do Template 7	Reference Type No.: 18 (Customer) Code: WF050-TD070 Description: Send Engagement Letter
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF050-TD060 Duration Date Calculation: 1D
WHAT	Type: Document Storage Att. Document Type Code: Customer Contract

Document Group

Code: CONTRACT
Description: Contracts
Directory Path Name: C:\Temp\
Insert Record Link: Yes

File Filter:

Display Order: 1
File Filter Code: PDF
File Filter
Code: PDF
Description: PDF
Filter: *.PDF

Document Type

Reference Type: 18 (Customer)
Code: CUSTOMER CONTRACT
Description: Customer Contract
Document Group: Contract

Workflow Template

Reference Type No.: 18 (Customer)

Code: WF050

Description: New Customer

Use Condition: None (Default Workflow Template on Reference Type)

Workflow Line 1

Type: To-Do

Code: WF050-TD010

Workflow Line 2

Type: To-Do

Code: WF050-TD020

Workflow Line 3

Type: To-Do Group

Code: WF050-TG010

Workflow Line 4

Type: To-Do

Code: WF050-TD060

Workflow Line 5

Type: To-Do

Code: WF050-TD070

Field Modification Line 1:

Old Status Level Filter: 0..14

New Status Level Filter: <>2

Field ID: 39 (Blocked)

Fix Value Input: All

Field Modification Line 2:

Old Status Level Filter: 0..14

New Status Level Filter: 2

Field ID: 39 (Blocked)

Fix Value Input: [Option Value is empty]

Fix Value: 0