



# Workflow Scenario Example 7

Type: Basic Process Workflows  
Department: Sales

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## Learning Objectives

### Source Offset Data Calculation

When a task is provided with a Source Offset Data Calculation formula, the calculated start date will be moved antedate or will be postponed in regards to the specified value.

### Timeframe referred to Reference Table

When the Source Type of a task has been chosen to be a Reference Table, the task will start in dependence of the value of a defined field on the Reference Table.

### Editing Form on Workflow Template

The indication of an Editing Form ID within a Workflow Template supports the setup of an Editing Form ID in the Reference Type. Consequently, this can be overwritten and the data source is opened on a detached site.

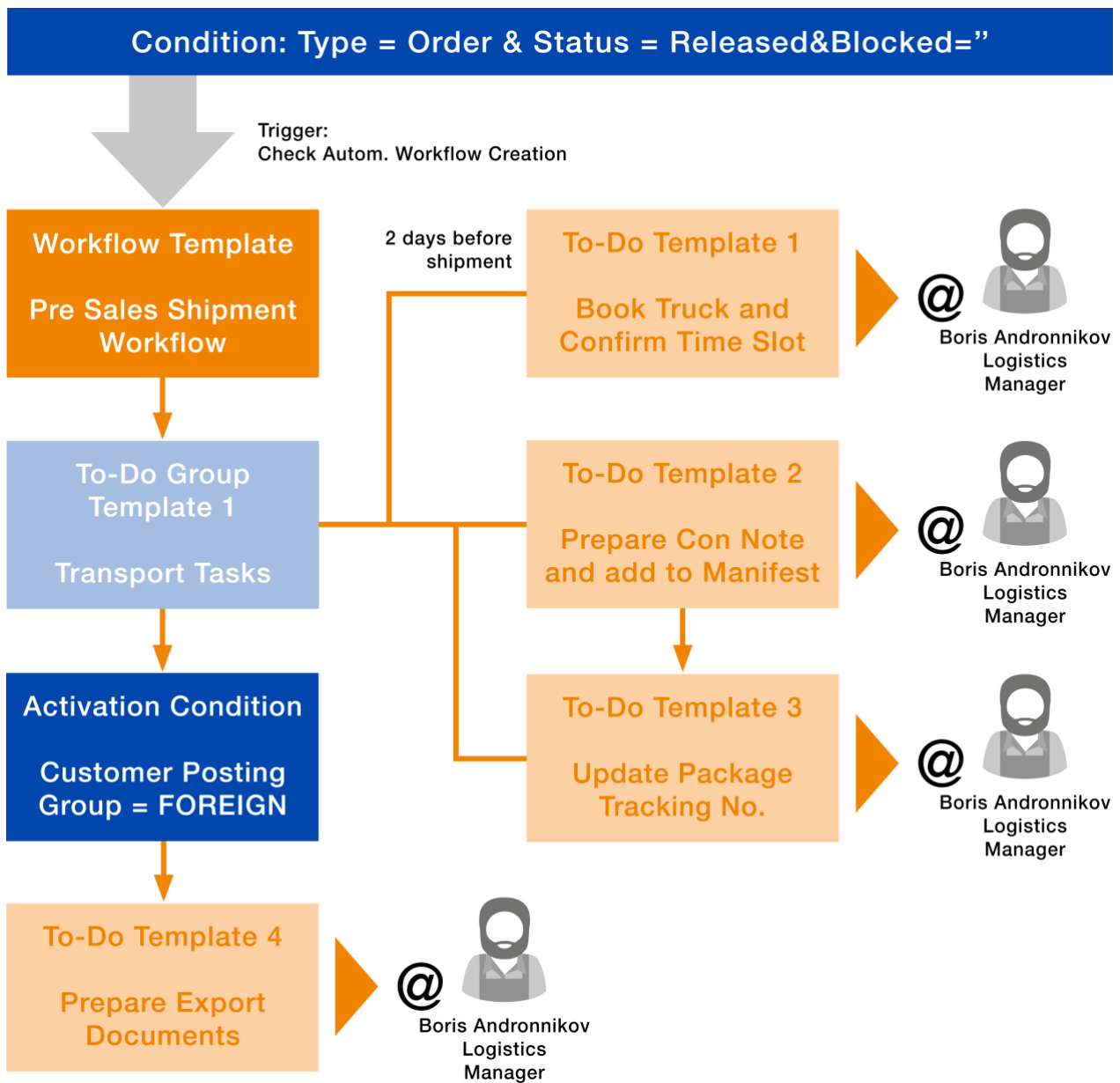
### Table Join

The definition of a Table Join makes it possible that the system has access to the data of two tables. Only a connection up to two tables is possible.

### Business Process „Pre Sales Shipment Workflow“

The Logistic Manager books the truck and confirms the appointment two days prior to the due day. He then compiles the order picking and adds the list to the loading list and updates the Shipping No. In addition, export documents can be created for foreign customers.

## agilesWorkflow Diagramm



## agilesWorkflow Setup

### Reference Type

No.: 36 (Sales Header)

Buffer Time on Function Call Server: 30 Seconds

Automatic Workflows: Yes

Keyword Definitions Lines

Tick all use Fields

Table ID: 36 (Sales Header)

Tick all use Fields

Keyword Definitions Line 1

Field ID: 3 (No.)

Keyword Definitions Line 2

Field ID: 79 (Sell-to Customer Name)

### Table Join

Table ID: 36 (Sales Header)

Table ID to join: 18 (Customer)

Table Join Line 1

Field ID: 1 (No.)

Value Type: Field

Value: 2 (Sell-to Customer No.)

### To-Do Template

To-Do Template 1	Reference Type No.: 36 (Sales Header) Code: WF070-TD010 Description: Book Truck and Confirm Time Slot
WHO	Employee Code: BA
WHY	No Activation
WHEN	Source Type: Reference Table Source Field: 21 (Shipment Date) Source Offset Date Calculation: -2D Duration Date Calculation: 2D Critical date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 2	Reference Type No.: 36 (Sales Header) Code: WF070-TD020 Description: Prepare Con Note and add to Manifest
WHO	Employee Code: BA
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To Do Template 3	Reference Type No.: 36 (Sales Header) Code: WF070-TD030 Description: Update Package Tracking No.
WHO	Employee Code: BA
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF070-TD020 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF070-C010

## Condition

Table ID: 36 (Sales Header)  
Code: WF070-C010  
Description: Check Package Tracking No.  
Type: Field Examination  
Condition Line 1  
Active: Yes  
Type: Field  
Table ID: 36 (Sales Header)  
Field ID: 106 (Tracking No.)  
Filter: <>  
Editing Page ID: 42 (Sales Order)

## To-Do Group Template

Reference Type No 36 (Sales Header)  
Code: WF070-TG010  
Description: Transport Tasks  
To-Do Group Lines  
Type: To-Do  
To-Do Group Line1  
Code: WF070-TD010  
To-Do Group Line 2  
Code: WF070-020  
To-Do Group Line 3  
Code: WF070-030

To-Do Template 4	<b>Reference Type No.:</b> 36 (Sales Header) <b>Code:</b> WF070-TD040 <b>Description:</b> Prepare Export Documentation
WHO	<b>Employee Code:</b> BA
WHY	<b>Condition Code</b> <b>Table ID:</b> 36 (Sales Header) <b>Code:</b> WF070-C020 <b>Description:</b> Foreign Customer <b>Type:</b> Activation <b>Condition Line 1</b> <b>Active:</b> Yes <b>Type:</b> Field <b>Table ID:</b> 36 (Sales Header) <b>Field ID:</b> 31 (Customer Posting Group) <b>Filter:</b> FOREIGN <b>Condition Code:</b> WF070-C020
WHEN	<b>Source Type:</b> To-Do Group <b>Source Code :</b> WF070-TG010 <b>Duration Date Calculation:</b> 2D <b>Duration Date Calculation:</b> -1D
WHAT	<b>Type:</b> Manual Completion

## Workflow Template

**Reference Type No.:** 36 (Sales Header)  
**Code:** WF070  
**Description:** Pre Sales Shipment Workflow  
**Editing Page ID:** 42 (Sales Order)  
**Use Condition:** WF070-C030

### Condition

**Table ID:** 36 (Sales Order)  
**Code:** WF070-C030  
**Description:** Sales Order Ready to Ship  
**Type:** Workflow Template Use  
**Condition Line 1**  
     **Active:** Yes  
     **Type:** Field  
     **Table ID:** 36 (Sales Header)  
     **Field ID:** 1 (Document Type)  
     **Filter:** Order  
**Condition Line 2**  
     **Active:** Yes  
     **Type:** Field  
     **Table ID:** 36 (Sales Header)  
     **Field ID:** 120 (Status)  
     **Filter:** Released  
**Condition Line 3**  
     **Active:** Yes  
     **Type:** Field  
     **Table ID:** 18 (Customer)  
     **Field ID:** 39 (Blocked)  
     **Filter:** [Option Value is empty]

Workflow Line 1

Type: To-do Group

Code: WF070-TG010

Workflow Line 2

Type: To-Do

Code: WF070-TD040