



Workflow Scenario Example 1

Type: New Dataset
Department: Purchase

November 30th, 2019

© 2021 Aptean. All rights reserved.





Learning Objectives

Workflow Template

The Workflow Template is a superior system created to structure and display business processes within the company. Individual tasks as well as group tasks are specified on the template to ensure full completion of tasks.

Reference Type:

A Reference Type assists to define the possible charts and tables based on a Workflow.

To-Do Template:

The tasks which have been mentioned above are defined on the To-Do Template, this means specific tasks are linked to specific employees or teams considering various conditions.

Manual Completion:

If a task is a Manual Completion, the person responsible for the task must complete the task through one click by hand.

Document Storage:

As soon as the Document needed is attached by the person who is responsible for, the task will be completed by default and the document will be stored.

Default Template:

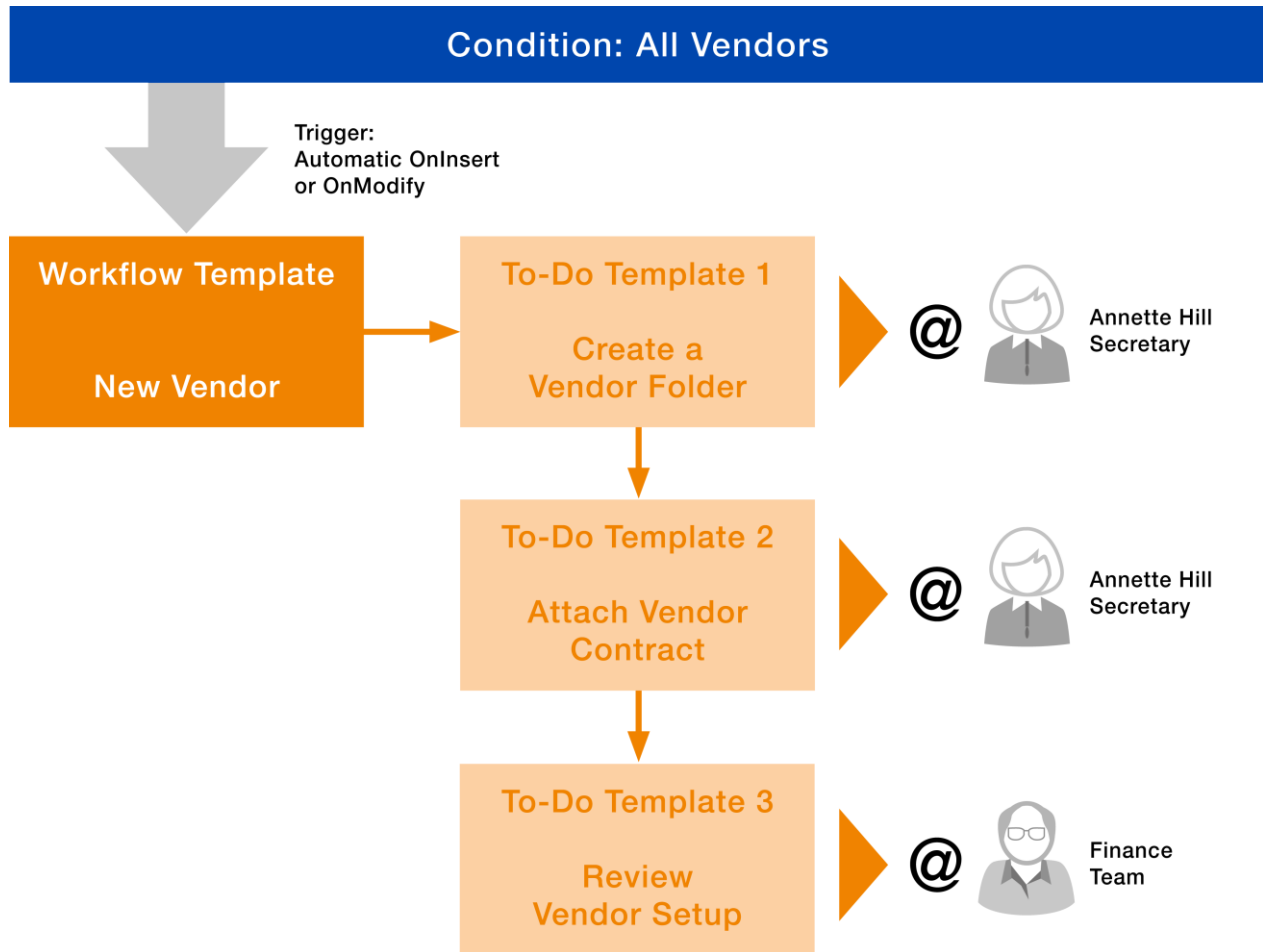
Once a Workflow is set as a Basic Template within a Reference Type, every regeneration of a new dataset of the same Reference Type will trigger the same Workflow.

Business Process „New Vendor“

The secretary has to make a new folder and create a new vendor for it furthermore, she needs to attach the vendor contract. Once this has been done, the contract is controlled of the right Dimensions and Posting Groups by a member of the Financial Management Team.



Aptean Advanced Workflow Diagramm





Aptean Advanced Workflow Setup

Reference Type

No.: 23 (Vendor)
 Editing Page ID: 26 (Vendor Card)
 Buffer Time on Function Call Server: 10 Seconds
 Automatic Workflows: Yes
 Keyword Definition Lines
 Tick all Use Fields
 Table ID: 23 (Vendor)
 Keyword Definition Line 1
 Field ID: 1 (No.)
 Keyword Definition Line 2
 Field ID: 2 (Name)

To-Do Templates

To-Do Template 1	Reference Type No.: 23 (Vendor) Code: WF010-TD010 Description: Create Vendor Folder
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Manual Completion

To-Do Template 2	Reference Type No.: 23 (Vendor) Code: WF010-TD020 Description: Attach Vendor Contract
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF010-TD010 Duration Date Calculation: 1D
WHAT	Type: Document Storage

To-Do Template 3	Reference Type No.: 23 (Vendor) Code: WF010-TD030 Description: Review Dimensions and Posting Group Setup
WHO	Team Code: Finance
WHY	No activation
WHEN	Source Type: To-Do Source Code : WF010-TD020 Duration Date Calculation: 1D
WHAT	Type: Manual Completion



Workflow Template

Reference Type No: 23 (Vendor)

Code: WF010

Description: New Vendor

Use Condition: None (Default Template on Reference Type)

Workflow Line 1

Type: To-Do

Code: WF010-TD010

Workflow Line 2

Type: To-Do

Code: WF010-TD020

Workflow Line 3

Type: To-Do

Code: WF010-TD030

Reference Type

Default Template: WF010



info@aptean.com

+1 770-351-9600

4325 Alexander Drive, Suite 100

Alpharetta, GA 30022-3740

Copyright © Aptean 2021. All Rights Reserved. These materials are provided by Aptean for informational purposes only, without representation or warranty of any kind, and Aptean shall not be liable for errors or omissions with respect to the materials. The only warranties for Aptean products and services are those set forth in the express warranty statements accompanying such products and services, if any, and nothing herein shall be construed as constituting an additional warranty. No part of this publication may be reproduced or transmitted in any form or for any purpose without the express written permission of Aptean. The information contained herein may be changed without prior notice. Some products marketed by Aptean contain proprietary software components of other software vendors. Aptean and other Aptean products and services referenced herein as well as their respective logos are registered trademarks or trademarks of Aptean or its affiliated companies. info@aptean.com