



Workflow Scenario Example 19

Type: Sales Order Approval Process
Department: Sales

May 7th, 2021

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Learning Objectives

Archiving:

If the data source is deleted (e.g. the sales order), then the process (i.e. the workflow) is also archived.

Combine a Workflow Template with Synchronous Workflow Template:

Processes are always created on the basis of templates. In the system, there is a workflow template as well as synchronous workflow templates. The synchronous workflow templates are not directly there to map a process - rather they are there to support the user. Workflow templates, on which the process is created in the system, can be linked to synchronous workflow templates. Synchronous workflows can be used, for example, to prevent the posting of sales orders at a certain point in time or until a certain condition is met. This means that posting is prevented with a synchronous workflow until the workflow has been processed. This can be, for example, the issuing of an approval.

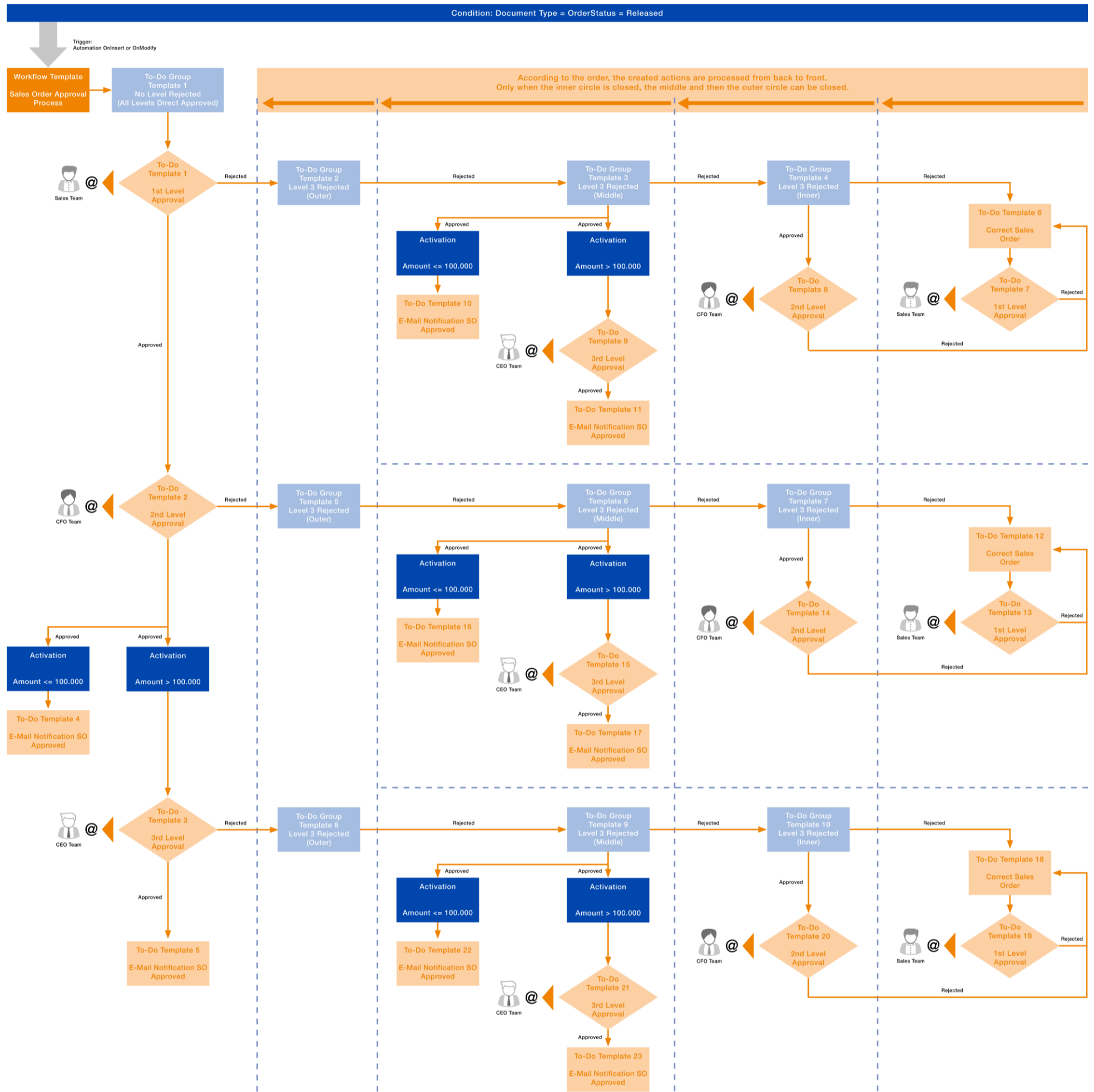
Visual View:

This is the graphical visualization of the entire process with its tasks broken down into a network/waterfall diagram. This illustration shows which tasks the process contains, in which order the tasks run in the process and which tasks are based on each other.

Business Process “Sales Order Approval”:

An approval is required to post a sales order. The sales manager and the finance manager must approve each sales order. In addition, management becomes involved if the amount limit of 100,000 euros is exceeded. In this case, a two-stage approval process becomes a three-stage one. Corrections to the respective approval processes are always made by the advisor (the person who is responsible for the sales order).

Aptean Advanced Workflow Diagramm





Aptean Advanced Workflow Setup

Reference Type

No.: 36 (Sales Header)

Buffer Time on Function Call Server: 1 minute

Automatic Workflows: Yes

Keyword Definitions Line 1

Table ID: 36 (Sales Header)

Field ID: 1 (Document Type)

Tick all Use Fields

Keyword Definitions Line 2

Table ID: 36 (Sales Header)

Field ID: 3 (No.)

Tick all Use Fields

Keyword Definitions Line 3

Table ID: 36 (Sales Header)

Field ID: 2 (Sell-to Customer No.)

Tick all Use Fields

Keyword Definitions Line 4

Table ID: 36 (Sales Header)

Field ID: 79 (Sell-to Customer Name)

Tick all Use Fields

To-do Templates

To-do Template 1	Reference Type No.: 36 (Sales Header) Code: WF190-TD010 Description: 1st Level Approval
WHO	Team Code: SALE
WHY	No Activation
WHEN	Source Type: Workflow Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

Decision Option Set

Code: APPROVAL

Description: Approval

Decision Option Set Line 1

Value: Approve

Description: Approve

Decision Option Set Line 2

Value: Reject

Description: Reject



To-do Template 2	Reference Type No.: 36 (Sales Header) Code: WF190-TD020 Description: 2nd Level Approval
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190-TD010 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD010 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-do Template 3	Reference Type No.: 36 (Sales Header) Code: WF190-TD030 Description: 3rd Level Approval
WHO	Team Code: CEO
WHY	Decision To-do Template Code: WF190-TD020 Decision Value Filter: Approve Condition Code: WF190-C010
WHEN	Source Type: To-do Source Code: WF190-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

Condition

Table ID: 36 (Sales Header)
 Code: WF190-C010
 Description: Amount > 100000
 Type: Activation
 All Condition Lines
 Enabled: Yes
 Type: Field
 Table ID: 36 (Sales Header)
 Condition Line 1
 Field ID: 60 (Amount)
 Filter: >100000



To-do Template 4	Reference Type No.: 36 (Sales Header) Code: WF190-TD040 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD020 Decision Value Filter: Approve Condition Code: WF190-C020
WHEN	Source Type: To-do Source Code: WF190-TD020 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

Condition

Table ID: 36 (Sales Header)
Code: WF190-C020
Description: Amount <= 100000
Type: Activation

All Condition Lines

Enabled: Yes
Type: Field
Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 60 (Amount)
Filter: <=100000

Table ID: 36 (Sales Header)
Code: WF190-C030
Description: Close To-do automatically
Type: Field Examination

All Condition Lines

Enabled: Yes
Type: Field
Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 3 (No.)
Filter: <>"

To-do Template 5	Reference Type No.: 36 (Sales Header) Code: WF190-TD050 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD030 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD030 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030



To-do Template 6	Reference Type No.: 36 (Sales Header) Code: WF190-TD060 Description: Correct Sales Order
WHO	Team Code: SP Employee Table Option: Salesperson/Purchaser Employee Table ID: 36 Employee Field ID: 43
WHY	Decision To-do Template Code: WF190-TD010 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD010 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-do Template 7	Reference Type No.: 36 (Sales Header) Code: WF190-TD070 Description: 1st Level Approval
WHO	Team Code: SALE
WHY	Decision To-do Template Code: WF190-TD010 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD060 Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-do Template 8	Reference Type No.: 36 (Sales Header) Code: WF190-TD080 Description: 2nd Level Approval
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190-TD070 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD070 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL



To-do Template 9	Reference Type No.: 36 (Sales Header) Code: WF190-TD090 Description: 3rd Level Approval
WHO	Team Code: CEO
WHY	Decision To-do Template Code: WF190-TD080 Decision Value Filter: Approve Condition Code: WF190-C010
WHEN	Source Type: To-do Source Code: WF190-TD080 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-do Template 10	Reference Type No.: 36 (Sales Header) Code: WF190-TD100 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD080 Decision Value Filter: Approve Condition Code: WF190-C020
WHEN	Source Type: To-do Source Code: WF190-TD080 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-do Template 11	Reference Type No.: 36 (Sales Header) Code: WF190-TD110 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD090 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD090 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030



To-do Template 12	Reference Type No.: 36 (Sales Header) Code: WF190-TD120 Description: Correct Sales Order
WHO	Team Code: SP Employee Table Option: Salesperson/Purchaser Employee Table ID: 36 Employee Field ID: 43
WHY	Decision To-do Template Code: WF190-TD020 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-do Template 13	Reference Type No.: 36 (Sales Header) Code: WF190-TD130 Description: 1st Level Approval
WHO	Team Code: SALE
WHY	Decision To-do Template Code: WF190-TD020 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD120 Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-do Template 14	Reference Type No.: 36 (Sales Header) Code: WF190-TD140 Description: 2nd Level Approval
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190-TD130 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD130 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL



To-do Template 15	Reference Type No.: 36 (Sales Header) Code: WF190-TD150 Description: 3rd Level Approval
WHO	Team Code: CEO
WHY	Decision To-do Template Code: WF190-TD140 Decision Value Filter: Approve Condition Code: WF190-C010
WHEN	Source Type: To-do Source Code: WF190-TD140 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-do Template 16	Reference Type No.: 36 (Sales Header) Code: WF190-TD160 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD140 Decision Value Filter: Approve Condition Code: WF190-C020
WHEN	Source Type: To-do Source Code: WF190-TD140 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-do Template 17	Reference Type No.: 36 (Sales Header) Code: WF190-TD170 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD150 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD150 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030



To-do Template 18	Reference Type No.: 36 (Sales Header) Code: WF190-TD180 Description: Correct Sales Order
WHO	Team Code: SP Employee Table Option: Salesperson/Purchaser Employee Table ID: 36 Employee Field ID: 43
WHY	Decision To-do Template Code: WF190-TD030 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD030 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-do Template 19	Reference Type No.: 36 (Sales Header) Code: WF190-TD190 Description: 1st Level Approval
WHO	Team Code: SALE
WHY	Decision To-do Template Code: WF190-TD030 Decision Value Filter: Reject
WHEN	Source Type: To-do Source Code: WF190-TD180 Duration Date Calculation: 1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-do Template 20	Reference Type No.: 36 (Sales Header) Code: WF190-TD200 Description: 2nd Level Approval
WHO	Team Code: CFO
WHY	Decision To-do Template Code: WF190-TD190 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD190 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL



To-do Template 21	Reference Type No.: 36 (Sales Header) Code: WF190-TD210 Description: 3rd Level Approval
WHO	Team Code: CEO
WHY	Decision To-do Template Code: WF190-TD200 Decision Value Filter: Approve Condition Code: WF190-C010
WHEN	Source Type: To-do Source Code: WF190-TD200 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: APPROVAL

To-do Template 22	Reference Type No.: 36 (Sales Header) Code: WF190-TD220 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD200 Decision Value Filter: Approve Condition Code: WF190-C020
WHEN	Source Type: To-do Source Code: WF190-TD200 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030

To-do Template 23	Reference Type No.: 36 (Sales Header) Code: WF190-TD230 Description: [Auto:] E-Mail Notification SO Approved
WHO	Team Code: WKFLADMIN
WHY	Decision To-do Template Code: WF190-TD210 Decision Value Filter: Approve
WHEN	Source Type: To-do Source Code: WF190-TD210 Duration Date Calculation: 1D
WHAT	Type: Field Examination Condition Code: WF190-C030



To-do Group Template

[Customize This Page... → FastTabs: Show "Loop"]

Reference Type No.: 36 (Sales Header)

Code: WF190-TG100

Description: Level 3 Rejected (Inner)

To-do Group Line 1

Type: To-do

Code: WF190-TD180

To-do Group Line 2

Type: To-do

Code: WF190-TD190

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD180

Loop Group End To-Do: WF190-TD190

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG090

Description: Level 3 Rejected (Middle)

To-do Group Line 1

Type: To-do Group

Code: WF190-TG100

To-do Group Line 2

Type: To-do

Code: WF190-TD200

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD180

Loop Group End To-Do: WF190-TD200

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes



Reference Type No.: 36 (Sales Header)
Code: WF190-TG080
Description: Level 3 Rejected (Outer)
To-do Group Line 1
 Type: To-do Group
 Code: WF190-TD090
To-do Group Line 2
 Type: To-do
 Code: WF190-TD210
To-do Group Line 3
 Type: To-do
 Code: WF190-TD220
To-do Group Line 4
 Type: To-do
 Code: WF190-TD230
Loop Group Activate: Yes
Loop Group Start To-Do: WF190-TD180
Loop Group End To-Do: WF190-TD210
Loop Group Decision Value: Reject
Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)
Code: WF190-TG070
Description: Level 2 Rejected (Inner)
To-do Group Line 1
 Type: To-do
 Code: WF190-TD120
To-do Group Line 2
 Type: To-do
 Code: WF190-TD130
Loop Group Activate: Yes
Loop Group Start To-Do: WF190-TD120
Loop Group End To-Do: WF190-TD130
Loop Group Decision Value: Reject
Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)
Code: WF190-TG060
Description: Level 2 Rejected (Middle)
To-do Group Line 1
 Type: To-do Group
 Code: WF190-TG070
To-do Group Line 2
 Type: To-do
 Code: WF190-TD140
Loop Group Activate: Yes
Loop Group Start To-Do: WF190-TD120
Loop Group End To-Do: WF190-TD140
Loop Group Decision Value: Reject
Loop Group Use Reopen Date: Yes



Reference Type No.: 36 (Sales Header)
Code: WF190-TG050
Description: Level 2 Rejected (Outer)
To-do Group Line 1
 Type: To-do Group
 Code: WF190-TG060
To-do Group Line 2
 Type: To-do
 Code: WF190-TD150
To-do Group Line 3
 Type: To-do
 Code: WF190-TD160
To-do Group Line 4
 Type: To-do
 Code: WF190-TD170
Loop Group Activate: Yes
Loop Group Start To-Do: WF190-TD120
Loop Group End To-Do: WF190-TD150
Loop Group Decision Value: Reject
Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)
Code: WF190-TG040
Description: Level 1 Rejected (Inner)
To-do Group Line 1
 Type: To-do
 Code: WF190-TD060
To-do Group Line 2
 Type: To-do
 Code: WF190-TD070
Loop Group Activate: Yes
Loop Group Start To-Do: WF190-TD060
Loop Group End To-Do: WF190-TD070
Loop Group Decision Value: Reject
Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)
Code: WF190-TG030
Description: Level 1 Rejected (Middle)
To-do Group Line 1
 Type: To-do Group
 Code: WF190-TG040
To-do Group Line 2
 Type: To-do
 Code: WF190-TD080
Loop Group Activate: Yes
Loop Group Start To-Do: WF190-TD060
Loop Group End To-Do: WF190-TD080
Loop Group Decision Value: Reject
Loop Group Use Reopen Date: Yes



Reference Type No.: 36 (Sales Header)

Code: WF190-TG020

Description: Level 1 Rejected (Outer)

To-do Group Line 1

Type: To-do Group

Code: WF190-TG030

To-do Group Line 2

Type: To-do

Code: WF190-TD090

To-do Group Line 3

Type: To-do

Code: WF190-TD100

To-do Group Line 4

Type: To-do

Code: WF190-TD110

Loop Group Activate: Yes

Loop Group Start To-Do: WF190-TD060

Loop Group End To-Do: WF190-TD090

Loop Group Decision Value: Reject

Loop Group Use Reopen Date: Yes

Reference Type No.: 36 (Sales Header)

Code: WF190-TG010

Description: No Level Rejected (All Levels Direct Approved)

To-do Group Line 1

Type: To-do

Code: WF190-TD010

To-do Group Line 2

Type: To-do

Code: WF190-TD020

To-do Group Line 3

Type: To-do

Code: WF190-TD030

To-do Group Line 4

Type: To-do

Code: WF190-TD040

To-do Group Line 5

Type: To-do

Code: WF190-TD050



Workflow Template

Reference Type No.: 36 (Sales Header)
Code: WF190
Description: Sales Order Approval Process
Reaction on Condition Discontinuation: Keep Active
Archive on Deleted Source: Yes
Auto. Archive (Identifier) When Closed: Yes
Editing Page ID: 42
Use Condition: WF190-C040
Additional: Yes

Condition

Table ID: 36 (Sales Header)
Code: WF190-C040
Description: Released Sales Order
Type: Workflow Template Use

All Condition Lines

Enabled: Yes
Type: Field
Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 1 (Document Type)
Filter: Order

Condition Line 2

Field ID: 120 (Status)
Filter: Released

Workflow Line 1

Type: To-do Group
Code: WF190-TG010
Description: No Level Rejected (All Levels Direct Approved)

Workflow Line 2

Type: To-do Group
Code: WF190-TG020
Description: Level 1 Rejected (Outer)

Workflow Line 3

Type: To-do Group
Code: WF190-TG050
Description: Level 2 Rejected (Outer)

Workflow Line 4

Type: To-do Group
Code: WF190-TG080
Description: Level 3 Rejected (Outer)



Synchronous Workflow Template

Reference Type No: 36 (Sales Header)

Code: WF192

Description: Stop Sales Order Posting

Event Trigger: By Hook-in

Hook-in Code: Before Sales Post

Break Condition Code: WF192-C010

Use Condition: WF192-C020

Additional: Yes

Condition

[Choose Columns... → "Template Code", "Check Condition Group"]

Table ID: 36 (Sales Header)

Code: WF192-C010

Description: Stop Sales Order Posting

Type: Break

All Condition Lines

Enabled: Yes

Type: Workflow Template

Table ID: 36 (Sales Header)

Condition Line 1

Template Code: WF190

Filter: <>2

Table ID: 36 (Sales Header)

Code: WF192-C020

Description: Stop Sales Order Posting / Reopen

Type: Workflow Template Use

All Condition Lines

Enabled: Yes

Type: Field

Table ID: 36 (Sales Header)

Condition Line 1

Field ID: 1 (Document Type)

Filter: Order



Reference Type No: 36 (Sales Header)
Code: WF194
Description: Stop Sales Order Reopen
Event Trigger: By Hook-in
Hook-in Code: Bef. Sales Reopen
Break Condition Code: WF194-C010
Use Condition: WF192-C020
Additional: Yes

Condition

Table ID: 36 (Sales Header)
Code: WF194-C010
Description: Stop Sales Order Reopen
Type: Break
All Condition Lines
 Enabled: Yes
 Type: To-do Template
 Table ID: 36 (Sales Header)
Condition Line 1
 Check Condition Group: A
 Template Code: WF190-TD060
 Filter: 2
Condition Line 2
 Check Condition Group: A
 Template Code: WF190-TD070
 Filter: <>0
Condition Line 3
 Check Condition Group: B
 Template Code: WF190-TD120
 Filter: 2
Condition Line 4
 Check Condition Group: B
 Template Code: WF190-TD130
 Filter: <>0
Condition Line 5
 Check Condition Group: C
 Template Code: WF190-TD180
 Filter: 2
Condition Line 6
 Check Condition Group: C
 Template Code: WF190-TD190
 Filter: <>0
Condition Line 7
 Check Condition Group: D
 Template Code: WF190-TD060
 Filter: 0
Condition Line 8
 Check Condition Group: D
 Template Code: WF190-TD120
 Filter: 0
Condition Line 9
 Check Condition Group: D
 Template Code: WF190-TD180
 Filter: 0



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