



Workflow Scenario Example 6

Type: Basic New Record Workflow
Department: Human Resources

November 30th, 2019

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Learning Objectives

Activation Condition

If an Activation Condition is met, the To-Do is created in regards to that specific condition. If the condition is not met, the task will be created admittedly but get the status of "no status".

Decision (Document Examination)

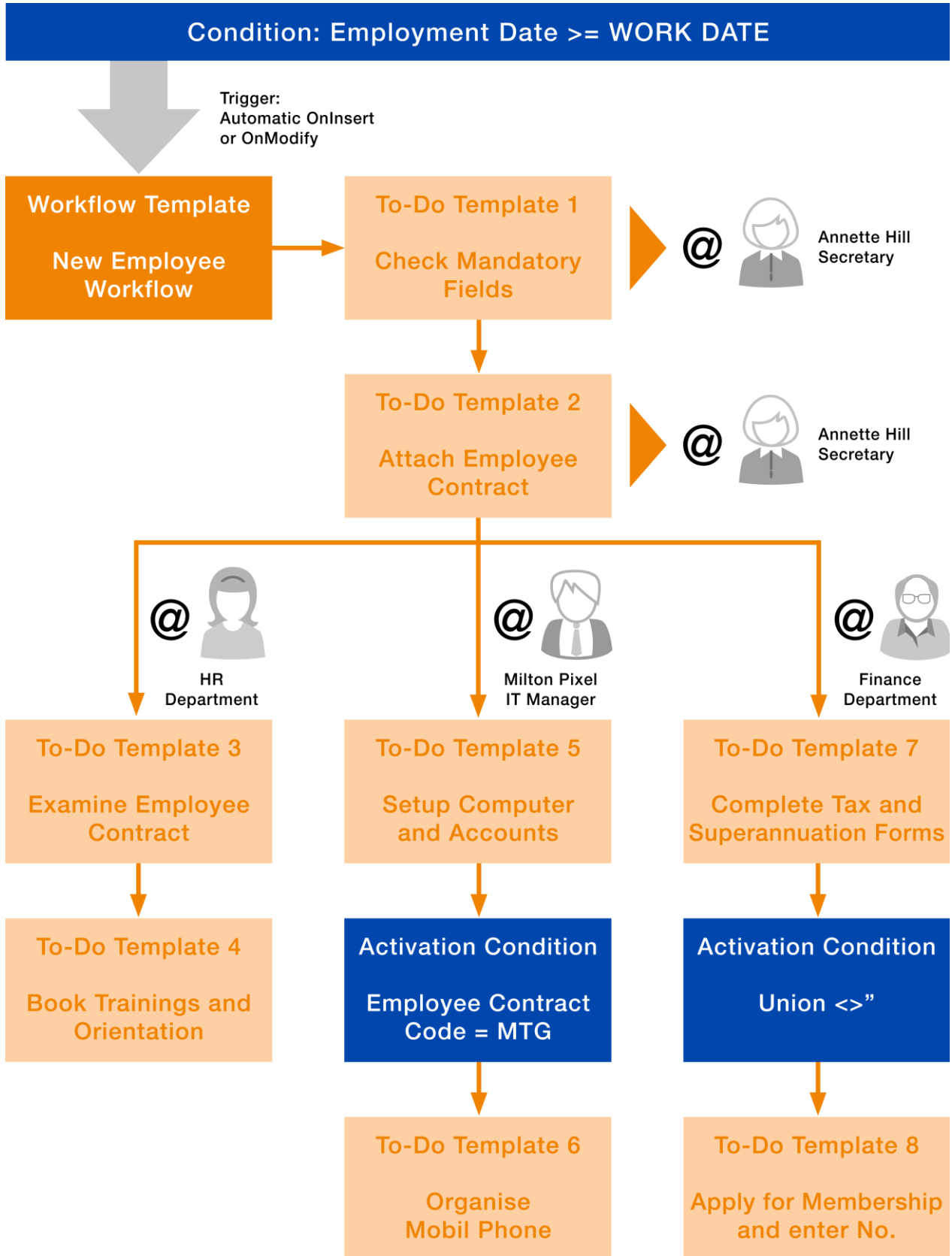
In terms of a Document Examination, it is possible to tick off a ballot box which causes that a document is revised in regards to Decisions.

Business Process "New Employee"

If a new employee is hired, the Secretary looks if all Mandatory Fields for the company are filled in (fields such as Name, Employment Date, Employee Contract Code and Social Security Number), then she attaches the contract. The Human Resource Department revises the employment contract and the IT Manager takes care of the computer installation, setups and accesses needed by the New Employee (cell phone in addition). Simultaneously, the Financial Management reports the tax and superannuation forms and can requests a union membership number.



Aptean Advanced Workflow Diagramm





Aptean Advanced Workflow Setup

Reference Type

No.: 5200 (Employee)
 Editing Page ID: 5200 (Employee Card)
 Buffer Time on Function Call Server: 30 Seconds
 Automatic Workflows: Yes
 Keyword Definitions Lines
 Tick all Use Fields
 Table ID: 5200 (Employee)
 Tick all Use Fields
 Keyword Definitions Line 1
 Field ID: 1 (No.)
 Keyword Definitions Line 2
 Field ID: 2 (First Name)
 Keyword Definitions Line 3
 Field ID: 4 (Last Name)

To-Do Template

To-Do Template 1	Reference Type No.: 5200 (Employee) Code: WF060-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: WF060-C010

Condition

Table ID: 5200 (Employee)
Code: WF060-C010
Description: Check Mandatory Fields
Type: Field Examination
All Condition Lines
 Active: Yes
 Type: Field
 Table ID: 5200 (Employee)
 Editing Form ID: 5200 (Employee Card)

Condition Line 1
 Field ID: 2 (First Name)
 Filter: <>

Condition Line 2
 Field ID: 4 (Last Name)
 Filter: <>

Condition Line 3
 Field ID: 29 (Employment Date)
 Filter: <>

Condition Line 4
 Field ID: 27 (Employmt. Contract Code)
 Filter: <>

Condition Line 5
 Field ID: 21 (Social Security No.)
 Filter: <>



To-Do Template 2	Reference Type No.: 5200 (Employee) Code: WF060-TD020 Description: Attach Employee Contract
WHO	Employee Code: AH
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD010 Duration: 1D
WAS	Type: Document Storage

To-Do Template 3	Reference Type No.: 5200 (Employee) Code: WF060-TD030 Description: Examine Employee Contract
WHO	Team Code: HR
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD020 Duration Date Calculation: 2D Duration Date Calculation: -1D
WHAT	Type: Decision Decision Option Set Code: Code: EXAMINATION Description: Examination Option Examination option Line 1 Value: OK Description: Ok Examination Option Line 1 Value: NOT OK Description: Not Ok Decision Option Code: EXAMINATION Document Examination Activate: Yes Document Storage To-Do Template: WF060-TD020

To-Do Template 4	Reference Type No.: 5200 (Employee) Code: WF060-TD040 Description: Book Trainings and Orientation
WHO	Team Code: HR
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD030 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion



To-Do Template 5	Reference Type No.: 5200 (Employee) Code: WF060-TD050 Description: Setup Computer and Accounts
WHO	Employee Code: MP
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 6	Reference Type No.: 5200 (Employee) Code: WF060-TD060 Description: Organize Mobile Phone
WHO	Employee Code: MP
WHY	Activation Condition Code: Table ID: 5200 (Employee) Code: WF060-C020 Description: Management Employee Type: Activation Condition Line 1 Active: Yes Art: Field Table ID: 5200 (Employee) Field ID: 27 (Employmt. Contract Code) Filter: Management Condition Code: WF060-C020
WHEN	Source Type: To-Do Source Code: WF060-TD050 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Field Examination

Field Examination

Table ID: 5200 (Employee)
Code: WF060-C030
Description: Check Mobile Phone No.
Type: Field Examination
Condition Line 1
 Active: Yes
 Art: Field
 Table ID: 5200 (Employee)
 Editing Form ID: 5200 (Employment Card)
 Field ID: 14 (Mobile Phone No.)
 Filter: <>”



To-Do Template 7	Reference Type No.: 5200 (Employee) Code: WF060-TD070 Description: Complete Tax and Super Forms
WHO	Team Code: Pay Role
WHY	No Activation
WHEN	Source Type: To-Do Source Code: WF060-TD020 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Manual Completion

To-Do Template 8	Reference Type No.: 5200 (Employee) Code: WF060-TD080 Description: Apply for Union Membership and enter No.
WHO	Team Code: Pay Role
WHY	Activation Condition Code Table ID: 5200 (Employee) Code: WF060-C040 Description: Union Type: Activation Condition Line 1 Active: Yes Type: Field Table ID: 5200 (Employee) Field ID: 22 (Union Code) Filter: <>" Condition Code: WF060-C040
WHEN	Source Type: To-Do Source Code: WF060-TD070 Duration Date Calculation: 2D Critical Date Calculation: -1D
WHAT	Type: Field Examination

Field Examination Condition

Table ID: 5200 (Employee)
Code: WF060-C050
Description: Check Union Membership No.
Type: Field Examination
Condition Line 1
 Active: Yes
 Type: Field
 Table ID: 5200 (Employee)
 Editing Form ID: 5200 (Employee Card)
 Field ID: 23 (Union Membership No.)
 Filter: <>"



Workflow Template

Reference Type No.: 5200 (Employee)

Code: WF060

Description: New Employee Workflow

Use Condition: WF060-C060

Condition

Table ID: 5200 (Employee)

Code: WF060-C060

Description: New Employee

Type: Workflow Template Use

Condition Line 1

Active: Yes

Type: Field

Table ID: 5200 (Employee)

Field ID: 29 (Employment Date)

Wild Card Values

Wild Card No.: 1

Value Type: System Value

System Value: Workdate

Filter: >=%1

Workflow Lines

Type: To-Do

Code: To-Do 1-8



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