Workflow Scenario Example 7

Type: Basic Process Workflows
Department: Sales

November 30th, 2019

aptean

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.
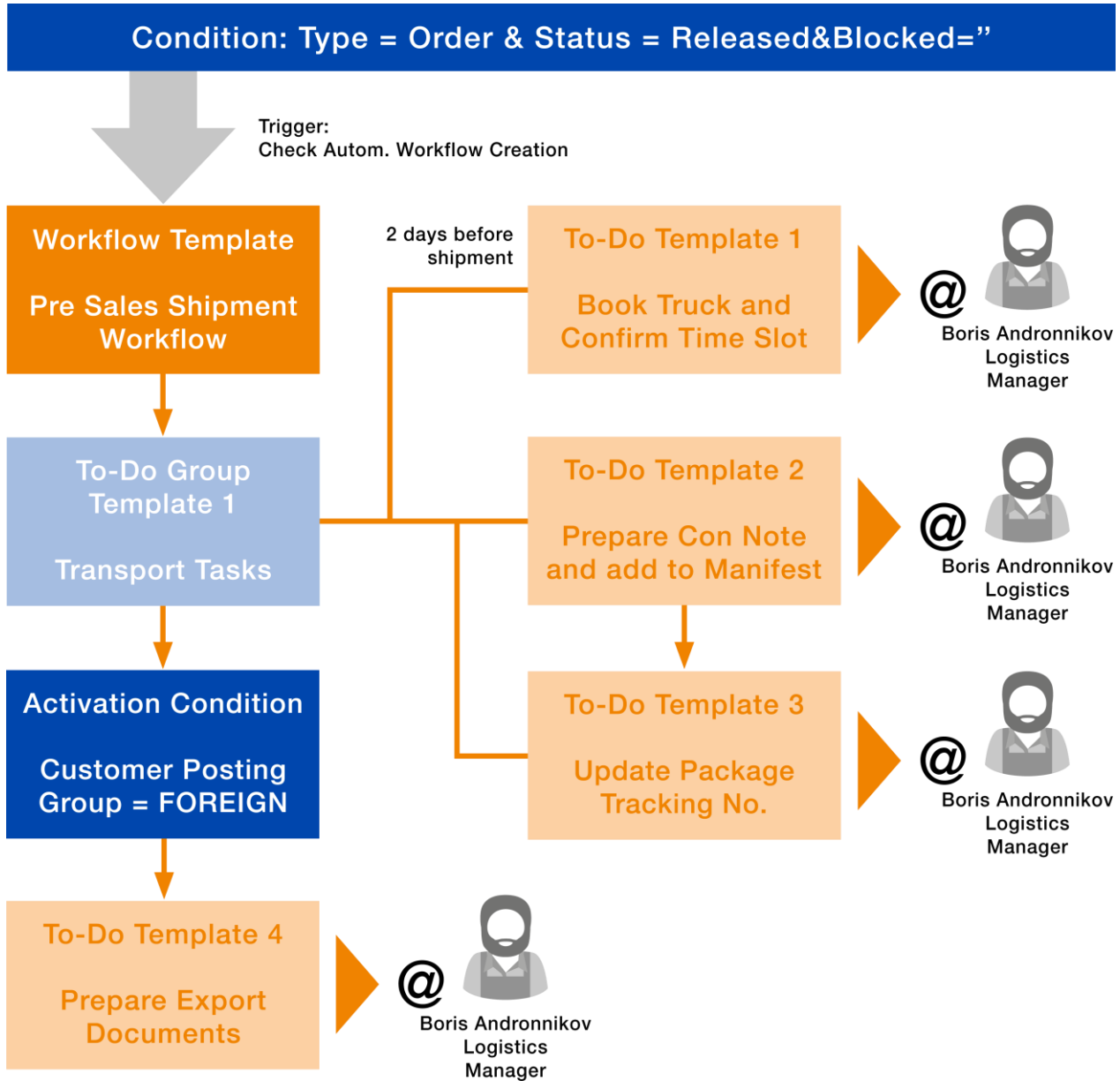
Table Join

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.

Aptean Advanced Workflow Diagramm

Condition: Type = Order & Status = Released&Blocked=”

Trigger:
Check Autom. Workflow Creation

Workflow Template

Pre Sales Shipment Workflow

2 days before shipment

To-Do Template 1

Book Truck and Confirm Time Slot

@ Boris Andronnikov
Logistics
Manager

To-Do Group Template 1

Transport Tasks

To-Do Template 2

Prepare Con Note and add to Manifest

@ Boris Andronnikov
Logistics
Manager

Activation Condition

Customer Posting Group = FOREIGN

To-Do Template 3

Update Package Tracking No.

@ Boris Andronnikov
Logistics
Manager

To-Do Template 4

Prepare Export Documents

@ Boris Andronnikov
Logistics
Manager

Aptean Advanced Workflow 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	Reference Type No.: 36 (Sales Header) Code: WF070-TD040 Description: Prepare Export Documentation
WHO	Employee Code: BA

WHY	Condition Code
	Table ID: 36 (Sales Header)
	Code: WF070-C020
	Description: Foreign Customer
	Type: Activation
	Condition Line 1
	     Active: Yes
	     Type: Field
	     Table ID: 36 (Sales Header)
	     Field ID: 31 (Customer Posting Group)
	     Filter: FOREIGN
	     Condition Code: WF070-C020

WHEN	Source Type: To-Do Group Source Code : WF070-TG010 Duration Date Calculation: 2D Duration Date Calculation: -1D
WHAT	Type: 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