## Prerequisite

You must have to install **AdxstudioCRM2011ProductivityPack** version 1.0.0035 for the installation of HRM solution. Once you succssefully install the productivity pack you can continue on HRM app installation.

## Auto Numbering

|  |  |
| --- | --- |
| Primary Persona: | HR Manager or HR Representative. |
| Configuration Settings | Browsers: Chrome, Internet Explorer. |
| Problem / Opportunity Statement: | The Adx Solution addresses the problem of managing Auto Number. |
| User Goals: | Human Resource will be managing Auto numbering in required entity. |
| Business Goals: | * Mange creating unique auto number for the required entity.
* Easy to define auto number format.
 |
| Triggers: |  |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Human Resource Login’s into the system. They can set auto numbering for any entity according to the desired format. |
| Detailed Steps | 1. Create Auto Numbering definition.
	1. Go to **Settings > Extensions > Auto Number definition** in the navigation bar.
	2. Click on the new button shown on the ribbon bar.
	3. It will open new form.
	4. Enter **name** of the definition that will be used by workflow for the auto numbering.
	5. Enter **format** and **digits.**
	6. Enter **Last Number issued**. This is the last number incremented.
2. Create Workflow to Configure Auto Numbering definition.
	1. Go to **Settings > Process Center > Processes** in the navigation bar.
	2. Click on the new button on the ribbon bar, popup window will open.
	3. Enter Process name and select category as workflow.
	4. Select entity in which you want auto numbering and click on the ok button.
	5. User will add 2 step in the workflow one for create and another is for update.
	6. Click on the Add step button in the grid, and choose Create record option.
	7. Select **Auto Numbering request** entity in the dropdown, and then click on the **set Properties** button.
	8. Pop-up window will appear, and enter **Auto Numbering definition** **Name** you gave in the step 1 under d (while creating Auto Number definition). Click on the **save and close** button on the ribbon bar.
	9. Again, click on the Add step button in the grid, and choose Update record option.
	10. Select **entity** in the dropdown on which you want auto numbering, and then click on the **set Properties** button.
	11. Pop-up window will appear. User will see dropdown named with **look for** under **Form Assistant** section. Select Create (Auto Numbering Request) and map the **Formatted Number** in which you want auto numbering.
	12. Click on the save and close button on the ribbon bar.
	13. User will see **convert to a real-time workflow** button on the ribbon bar. Click on the button to make it real time.
	14. User will see **Activate** button on the ribbon bar click on the button to activate.
 |
| Success Metrics: | 1. Create Auto Numbering definition: - Record will be created in Auto numbering definition.
2. Create Workflow to Configure Auto Numbering definition :-
* Workflow will be created and configured for the auto numbering.
* Workflow will be activated.
 |