Workflow Scenario Example 1

Type: New Dataset
Department: Purchase

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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.
agilesWorkflow Diagramm

Condition: All Vendors

Workflow Template
New Vendor

To-Do Template 1
Create a Vendor Folder
@ Annette Hill Secretary

To-Do Template 2
Attach Vendor Contract
@ Annette Hill Secretary

To-Do Template 3
Review Vendor Setup
@ Finance Team
### agilesWorkflow 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

<table>
<thead>
<tr>
<th>To-Do Template</th>
<th>Reference Type No.: 23 (Vendor)</th>
<th>Code: WF010-TD010</th>
<th>Description: Create Vendor Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WHO</strong></td>
<td>Employee Code: AH</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WHY</strong></td>
<td>No Activation</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WHEN</strong></td>
<td>Source Type: Workflow</td>
<td>Source Code: WF010-TD010</td>
<td>Duration Date Calculation: 1D</td>
</tr>
<tr>
<td><strong>WHAT</strong></td>
<td>Type: Manual Completion</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>To-Do Template</th>
<th>Reference Type No.: 23 (Vendor)</th>
<th>Code: WF010-TD020</th>
<th>Description: Attach Vendor Contract</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WHO</strong></td>
<td>Employee Code: AH</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WHY</strong></td>
<td>No Activation</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WHEN</strong></td>
<td>Source Type: To-Do</td>
<td>Source Code: WF010-TD010</td>
<td>Duration Date Calculation: 1D</td>
</tr>
<tr>
<td><strong>WHAT</strong></td>
<td>Type: Document Storage</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>To-Do Template</th>
<th>Reference Type No.: 23 (Vendor)</th>
<th>Code: WF010-TD030</th>
<th>Description: Review Dimensions and Posting Group Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WHO</strong></td>
<td>Team Code: Finance</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WHY</strong></td>
<td>No activation</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WHEN</strong></td>
<td>Source Type: To-Do</td>
<td>Source Code: WF010-TD020</td>
<td>Duration Date Calculation: 1D</td>
</tr>
<tr>
<td><strong>WHAT</strong></td>
<td>Type: Manual Completion</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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