



SMART LATTICE

Cloud Application Platform

Create an approval process that can easily track incoming requests and their status.

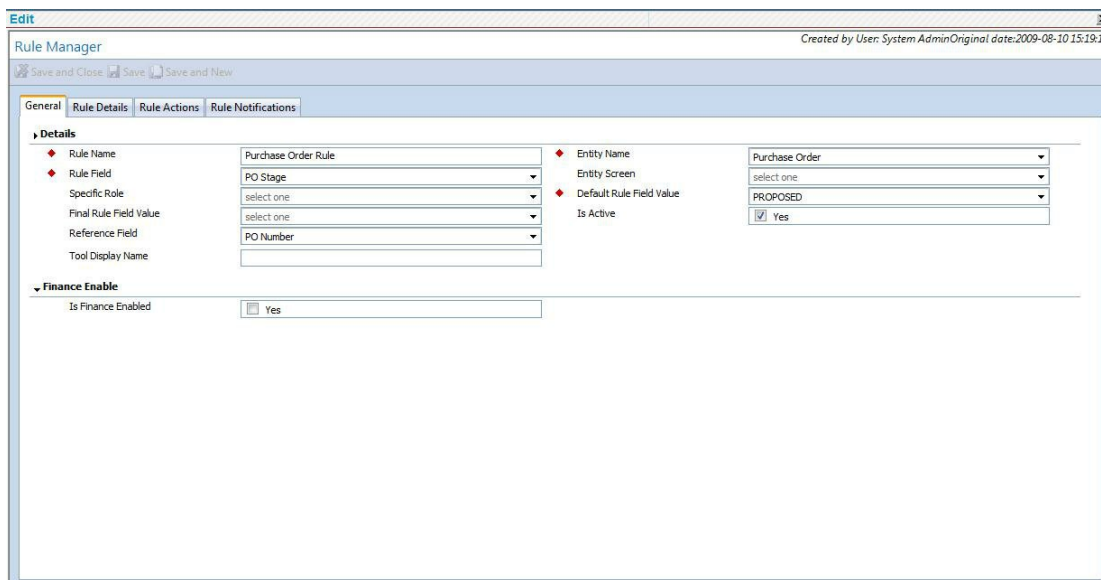
Introduction

To map out an approval process, create a workflow.
A workflow is a way to pass records from one person to another.

This example will create a simple Purchase Order process. The request will be routed to the project manager, ensuring that each step is completed. In addition, the workflow will track who has taken action and when to track the status of each Activity.

Workflows are made up of **states, actions, and Rules**. A Purchase Order request may have multiple states (e.g. Proposed, Technical Review, Commercial Review, Finalized, and Completed). Each state has Rule or set of Rules responsible for advancing the flow by defined actions.

1. Select the Entity you want to add the workflow to,



The screenshot shows the 'Rule Manager' application window. The title bar includes 'Edit' and 'Rule Manager'. The main content area has tabs for 'General', 'Rule Details', 'Rule Actions', and 'Rule Notifications'. The 'Rule Details' tab is active, showing a form with the following fields:

- Rule Name:** Purchase Order Rule
- Rule Field:** PO Stage
- Specific Role:** select one
- Final Rule Field Value:** select one
- Reference Field:** PO Number
- Tool Display Name:** (empty)
- Entity Name:** Purchase Order
- Entity Screen:** select one
- Default Rule Field Value:** PROPOSED
- Is Active:** Yes

Below the 'Rule Details' section, there is a 'Finance Enable' section with a checkbox for 'Is Finance Enabled' set to 'Yes'.

2. Let's say we have different project Roles: the *Technical Director*, the *Commercial Manager*, etc. with different responsibilities. We want to assign Purchase Order tasks to them as part of the workflow.

» Sys Rule Details

#	Role	Stage	Page Rule
1	Technical Director	TECH REVIEW	
2	Commercial Manager	COMM REVIEW	
3	Director	FINALIZED	
4	Director All	FINALIZED	
5			

3. Add the Rule to check to see if it's a Purchase order is finalized to be printed.

» Sys Rule Actions

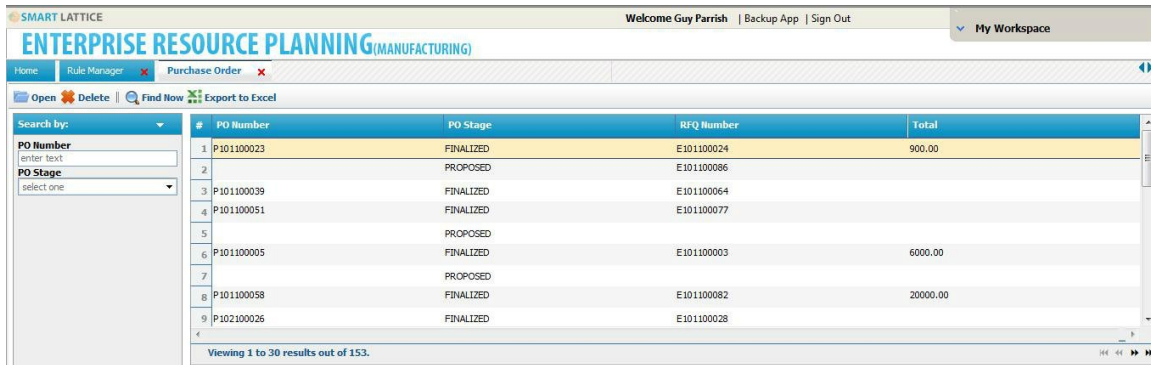
#	Stage	Page Rule
1	FINALIZED	Show Print
2		

4. Simple English Statements developed using SmartLattice designer to Enable Print.

- [-] Rules for Purchase Order
 - [-] Rule Show Print on .Purchase Order To be called: When?
 - [-] Update Tool "POPrint"
 - [-] Change the following properties
 - Show Yes
 - [-] Update Tool "print"
 - [-] Change the following properties
 - Show Yes
 - [-] Rule on stage Process on . To be called: When?
 - [-] Rule on load on .Purchase Order To be called: When Page Loads
 - [-] Rule on manufacture on . To be called: When?
 - [-] Rule On Before Approve on .Purchase Order To be called: Before Approve
 - [-] Rule Stage On Change on .PO Stage To be called: When Content Changes
 - [-] Rule on Total on .Purchase Order Details To be called: When?
 - [-] Rule after child update on .Purchase Order Details To be called: After Entity List Update
 - [-] Rule before update on .Purchase Order To be called: Before Update

How workflows show up with records

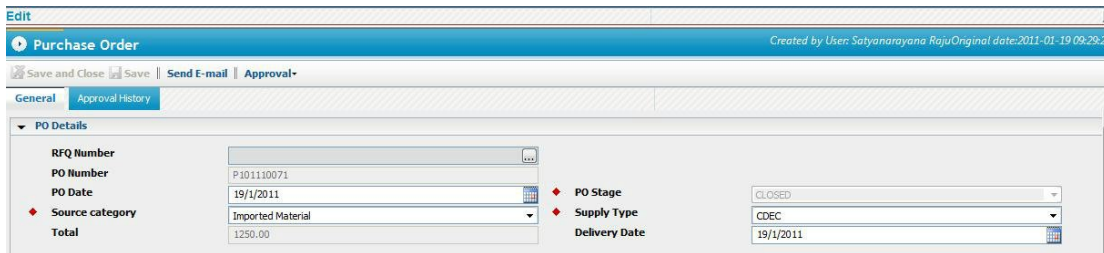
1.Views with work flow fields.



#	PO Number	PO Stage	RFQ Number	Total
1	P101100023	FINALIZED	E101100024	900.00
2		PROPOSED	E101100086	
3	P101100039	FINALIZED	E101100064	
4	P101100051	FINALIZED	E101100077	
5		PROPOSED		
6	P101100005	FINALIZED	E101100003	6000.00
7		PROPOSED		
8	P101100058	FINALIZED	E101100082	20000.00
9	P102100026	FINALIZED	E101100028	

Viewing 1 to 30 results out of 153.

2.Action buttons appear on the top of the record's detail view.



Edit | Purchase Order | Created by User: Satyanarayana Raju | Original date: 2011-01-19 09:29:25

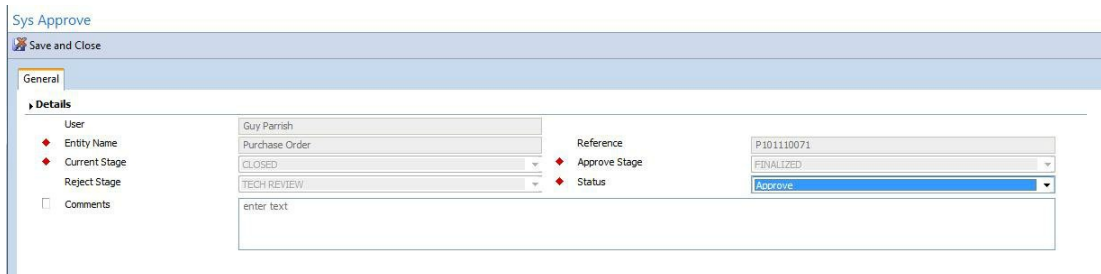
Save and Close | Save | Send E-mail | Approval+

General | Approval History

PO Details

RFQ Number	<input type="text" value=""/>
PO Number	<input type="text" value="P10110071"/>
PO Date	<input type="text" value="19/1/2011"/>
Source category	<input type="text" value="Imported Material"/>
Total	<input type="text" value="1250.00"/>
PO Stage	<input type="text" value="CLOSED"/>
Supply Type	<input type="text" value="CDEC"/>
Delivery Date	<input type="text" value="19/1/2011"/>

3.Clicking on action brings up pop up to advance to next state.



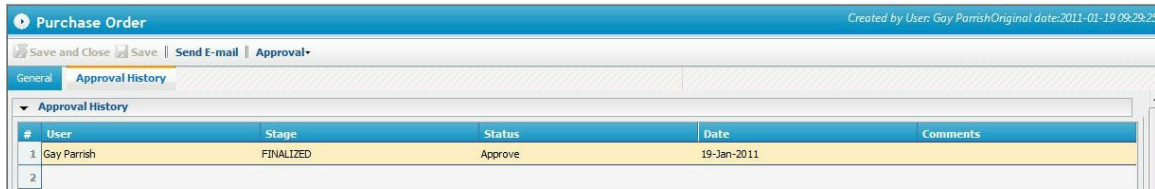
Sys Approve | Save and Close

General

Details

User	<input type="text" value="Guy Parrish"/>	Reference	<input type="text" value="P10110071"/>
Entity Name	<input type="text" value="Purchase Order"/>	Approve Stage	<input type="text" value="FINALIZED"/>
Current Stage	<input type="text" value="CLOSED"/>	Status	<input type="text" value="Approve"/>
Reject Stage	<input type="text" value="TECH REVIEW"/>		
Comments	<input type="text" value=""/>		

4. Workflow actions are recorded as part of the record details and can be displayed in reports and views.



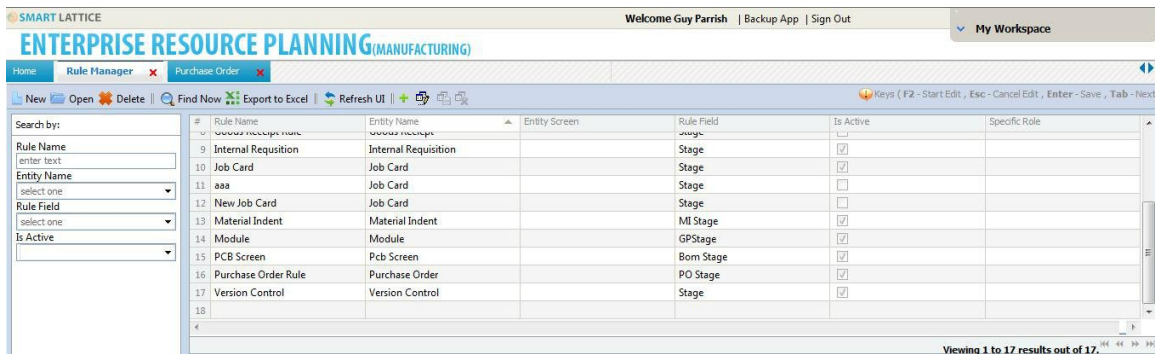
Created by User: Gay Parrish Original date: 2011-01-19 09:29:25

Save and Close Save Send E-mail Approval

General Approval History

#	User	Stage	Status	Date	Comments
1	Gay Parrish	FINALIZED	Approve	19-Jan-2011	
2					

Multiple Workflow rules defined for same entity are applied based on hierarchy of rules set.



SMART LATTICE Welcome Guy Parrish Backup App Sign Out My Workspace

ENTERPRISE RESOURCE PLANNING (MANUFACTURING)

Home Rule Manager Purchase Order

New Open Delete Find Now Export to Excel Refresh UI

Keys (F2 - Start Edit , Esc - Cancel Edit , Enter - Save , Tab - Next)

#	Rule Name	Entity Name	Entity Screen	Rule Field Usage	Is Active	Specific Role
9	Internal Requisition	Internal Requisition		Stage	<input checked="" type="checkbox"/>	
10	Job Card	Job Card		Stage	<input checked="" type="checkbox"/>	
11	aaa	Job Card		Stage	<input type="checkbox"/>	
12	New Job Card	Job Card		Stage	<input type="checkbox"/>	
13	Material Indent	Material Indent		MI Stage	<input checked="" type="checkbox"/>	
14	Module	Module		GPStage	<input checked="" type="checkbox"/>	
15	PCB Screen	Pcb Screen		Bom Stage	<input checked="" type="checkbox"/>	
16	Purchase Order Rule	Purchase Order		PO Stage	<input checked="" type="checkbox"/>	
17	Version Control	Version Control		Stage	<input checked="" type="checkbox"/>	
18						

Viewing 1 to 17 results out of 17.