

Work Flow – Introduction Course

SAP Business One version 9.0

October 2012



- Welcome to the introduction course of the Work Flow topic.

Agenda

- **Concept and Key Elements**
  - Concept of the Workflow in SAP Business One.
- **Workflow Service**
  - The engine which drives the Workflow in SAP Business One.
- **Workflow Template Design**
  - Design Workflow Process Template in SAP Business One Studio.
- **Activating Workflow in SAP Business One**
  - How to activate the Workflow in SAP Business One
- **Processing Workflow in SAP Business One**
  - How to process and monitor the Workflow in SAP Business One

- This is the agenda for the introduction course:
- During this course we will discuss the following topics:
  - First, we will review the concept of the Workflow in SAP Business One.
  - Then, we will focus on setting of Workflow Service in SAP Business One Service Manager, the engine, which drives the Workflow in SAP Business One.
  - We will briefly look at SAP Business One Studio and what components are used to design the Workflow Process Template.
  - Then we will review how to import and activate the Workflow Process Template in SAP Business One.
  - Finally, we will review how to process and monitor the Workflow in SAP Business One.

Note!

- This is a product training and we will focus on the solution options in SAP Business One.

Objectives



At the end of this course, you will be able to:

- Explain the concept of the Workflow in SAP Business One.
- Recognize key elements used in the Workflow Template.
- Activate and process the Workflow in SAP Business One.

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Business Example

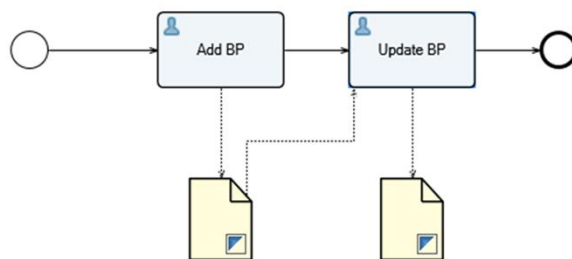


OEC Computers has dedicated users responsible for financial relevant data at Business Partner Master Data.

Therefore, once new Business Partner Master Data is created the responsible user should get a task to check and complete the financial data at this new Business Partner Master Data.

Bryce the accountant, wants to get full control of new business partners created in the system.

You tell him about the *Workflow* solution in SAP Business One.



- *OEC Computers* has dedicated users responsible for financial relevant data at Business Partner Master Data.
- Therefore, once new Business Partner Master Data is created the responsible user should get a task to check and complete the financial data at this new Business Partner Master Data.
- Bryce the accountant, wants to get full control of new business partners created in the system.
- You tell him about the *Workflow* solution in SAP Business One.

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- **Concept and Key Elements**

- Concept of the Workflow in SAP Business One.

- **Workflow Service**

- The engine which drives the Workflow in SAP Business One.

- **Workflow Template Design**

- Design Workflow Process Template in SAP Business One Studio.

- **Activating Workflow in SAP Business One**

- How to activate the Workflow in SAP Business One

- **Processing Workflow in SAP Business One**

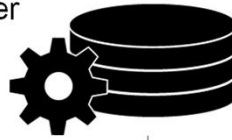
- How to process and monitor the Workflow in SAP Business One

- Let us have a look on the basic concept of the Workflow in SAP Business One.

Concept and Key Elements

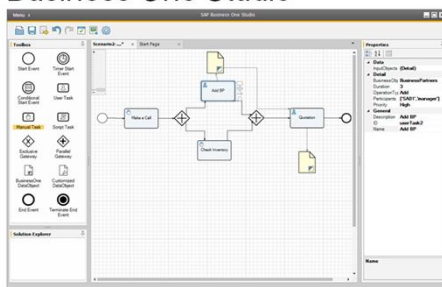
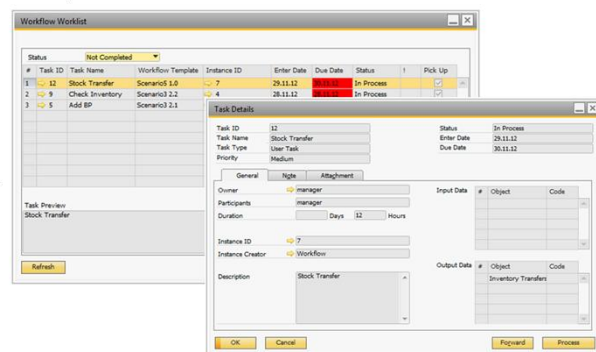


Configure the Workflow Service in SAP Business One Service Manager



Import, activate and process the Workflow Template in SAP Business One

Design the Workflow Process Template in SAP Business One Studio



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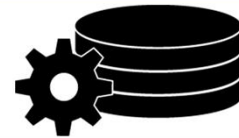
- Workflow in SAP Business One is driven by Workflow Service.
- Workflow Process Templates, which are describing the flow of the tasks and their assignment to the users, are designed in SAP Business One Studio.
- So, in order to process specific Workflow in SAP Business One, we need to:
  - configure the Workflow Service in SAP Business One Service Manager
  - design the Workflow Process Template in SAP Business One Studio
  - import, activate and process the Workflow Process Template in SAP Business One

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- Next, we we will focus on setting of Workflow Service in SAP Business One Service Manager.

Workflow Service Prerequisites



Prerequisites:

Before configuring the Workflow Service, the **Workflow** user has to be activated in SAP Business One

- Go to **Administration → Setup → General → Users**
- Find the user **Workflow**
- Set the password for this user
  - Password Never Expires
  - No need to Change Password at Next Logon
- Go to **Administration → License → License Administration**
- Assign the Professional License to the user **Workflow**

• Prerequisites:

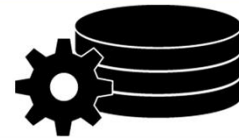
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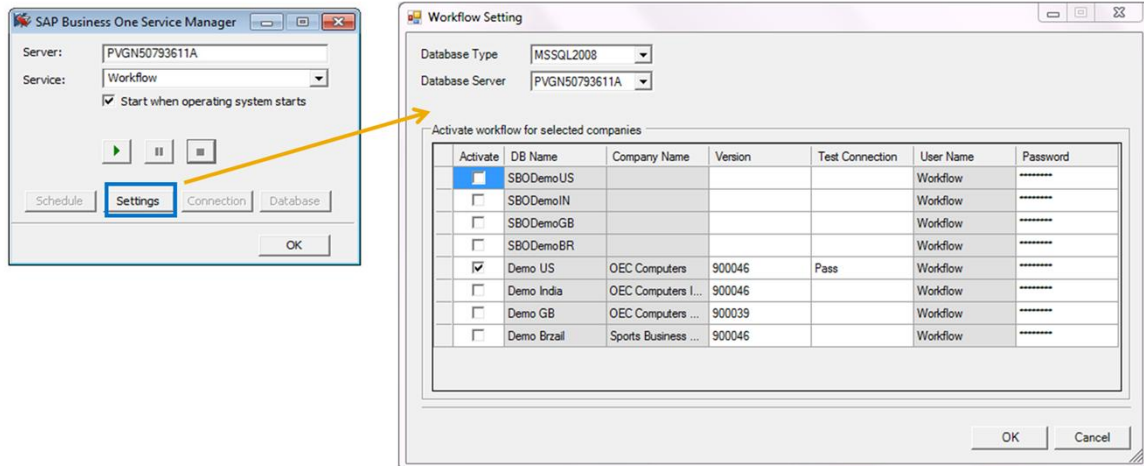
Note:

The need of Professional license for **Workflow** user is just a temporary solution in first release of SAP Business One 9.0. During the ramp-up it will be replaced by the solution, which will not require any commercial license to be used for **Workflow** user.

Workflow Service



- In *Service Manager* select the **Workflow** service
- In the *Workflow Setting* window activate the workflow for selected companies
- Start the **Workflow** service



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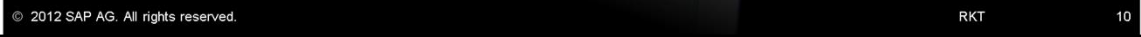
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- In *Service Manager* select the **Workflow** service.
- In the *Workflow Setting* window activate the workflow for selected companies
- Start the **Workflow** service

Note:

The Workflow Setting window is secured by **B1SiteUser** password.



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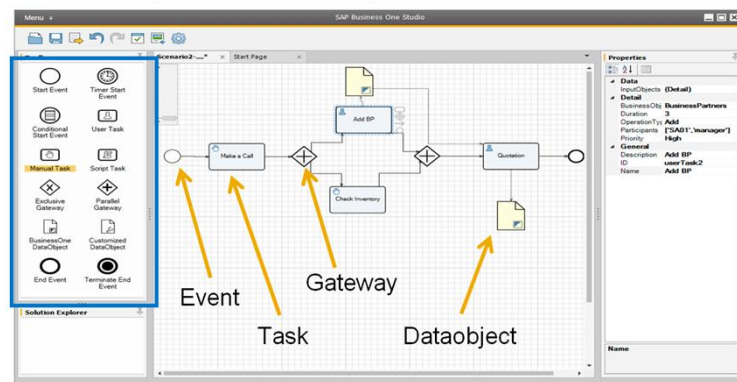
- Let us have a look at SAP Business One Studio and what components are used to design the Workflow Process Template.

Workflow Template Design



- Workflow templates are designed in SAP Business One Studio.
- Start SAP Business One Studio in Windows : **Start → All Programs → SAP Business One → SAP Business One Studio → SAP Business One Studio**
- In SAP Business One Studio there is a collection of predefined elements, which can be used to design the workflow process templates:

- Event Elements
- Task Elements
- Gateway Elements
- Dataobject Elements



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- Workflow templates are designed in SAP Business One Studio.
- Workflow template is then used in SAP Business One as the pattern for specific workflow instances.
- Start SAP Business One Studio in Windows : **Start → All Programs → SAP Business One → SAP Business One Studio → SAP Business One Studio**
- In SAP Business One Studio there is a collection of predefined elements, which can be used to design the workflow process templates:
  - Event Elements
  - Task Elements
  - Gateway Elements
  - Dataobject Elements
- Event Elements are used to indicate the starting points and the endpoints in the workflow diagram.
- Task Element typically requires user action, for example to call a prospect or create a Business Partner Master Data.
- Gateway Element indicates the spot where the flow splits into multiple flow paths
- Dataobject Element represents the object which needs to be processed in

the specific task, for example Quotation.

Workflow Template Design – Event Elements



Event Elements:

- **Start Event** ○
  - workflow process is started manually by the user of SAP Business One.
- **Timer Start Event** ⌚
  - workflow process is started by the Workflow Service, according to the timer settings in SAP Business One Studio. It is either a one time start or a recurrent start.
- **Conditional Start Event** 📋
  - by the workflow service, according to the conditional settings in SAP Business One Studio. Use JavaScript to define condition settings.
- **End Event** ○
  - Indicates the end of a workflow process.
- **Terminate End Event** ●
  - Indicates the end of a multi-flow path workflow process. Once the flow path reaches this point, other flow paths are terminated automatically.

Let us review the predefined elements in the workflow process template.

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Workflow Template Design – Task Elements



Task Elements:

- **User Task** 
  - Indicates the tasks that users need to process in SAP Business One, for example create Sales Quotation, update Business Partner Master Data, create Warehouse Transfer, etc.
- **Manual Task** 
  - Indicates the tasks that users process outside SAP Business One, for example, making a phone call or scheduling a meeting,.
- **Script Task** 
  - Indicates the tasks that the workflow service processes automatically, once the conditions defined in SAP Business One Studio are met. Use JavaScript to define script tasks.

• Task Elements:

- **User Task**
  - Indicates the tasks that users need to process in SAP Business One, for example create Sales Quotation, update Business Partner Master Data, create Warehouse Transfer, etc.
- **Manual Task**
  - Indicates the tasks that users process outside SAP Business One, for example, making a phone call or scheduling a meeting,.
- **Script Task**
  - Indicates the tasks that the workflow service processes automatically. Use JavaScript to define script tasks.

Workflow Template Design – Gateway Elements



Gateway Elements:

- **Parallel Gateway** 
  - Indicates the spot where the flow splits into multiple flow paths. Users must process each of the flow paths into which the flow splits.
- **Exclusive Gateway** 
  - Indicates the spot where the flow splits into several flow path options. Users only process the flow path which meets the flow conditions.

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Workflow Template Design – Dataobject Elements



Dataobject Elements:

- **BusinessOne Dataobject** 
  - Indicates the dataobjects that are currently supported by the workflow function in SAP Business One .
- **Customized Dataobject** 
  - Indicates that the dataobjects contain a series of variables necessary for the workflow service to execute the logics, such as calculating, comparing, deciding, and so on. They are usually quoted by the JavaScript specified in the Script Task or the Sequence Flow that follows the Exclusive Gateway.

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Workflow Template Design – Design Steps



When designing the Workflow Template, you

- Compose the workflow from different elements - Drag and Drop elements on the working pane
- Define conditions in Conditional Start Event (using JavaScript)
- Set timers at Timer Start Event
- Assign SAP Business One users to specific User Tasks and Manual Tasks
- Assign SAP Business One dataobjects and customized dataobjects to User Task and select the operation to be performed with the selected object
- Describe the task to be processed in Manual Tasks
- Define the scripts in Script Tasks (using JavaScript)
- Define conditions at Exclusive Gateway (using JavaScript)
- And, finally, export the Workflow Process Template as .xml file.

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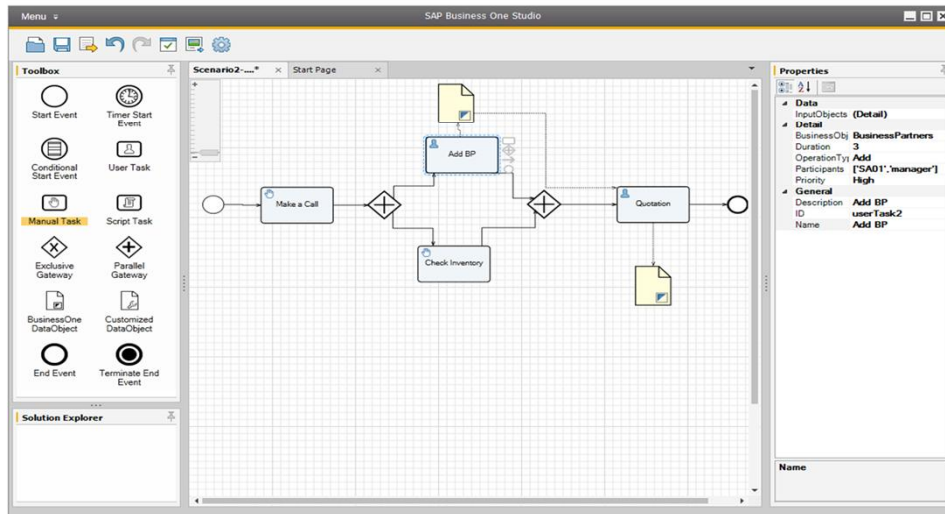
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- Describe the task to be processed in Manual Tasks
- Define the scripts in Script Tasks (using JavaScript)
- Define conditions at Exclusive Gateway (using JavaScript)
- And, finally, export the Workflow Process Template as .xbml file.
  - that follows the Exclusive Gateway.

Workflow Template Design



For details on how to design the Workflow Process Template in SAP Business One Studio, refer to the How to Configure the Workflow Service and Design the Workflow Process Templates.pdf

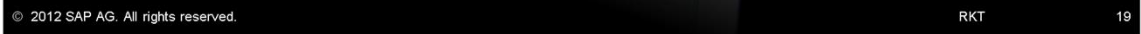


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- For details on how to design the Workflow Process Template in SAP Business One Studio, refer to the How to Configure the Workflow Service and Design the Workflow Process Templates.pdf
- You can find this guide in How to Work with Workflow in 9.0.ZIP file on How-To Guides for SAP Business One 9.0 page on PE portal :
https://service.sap.com/~form/handler?_APP=00200682500000002713&_EVENT=DISPLAY&_ARCHIVE=01100035871000577346



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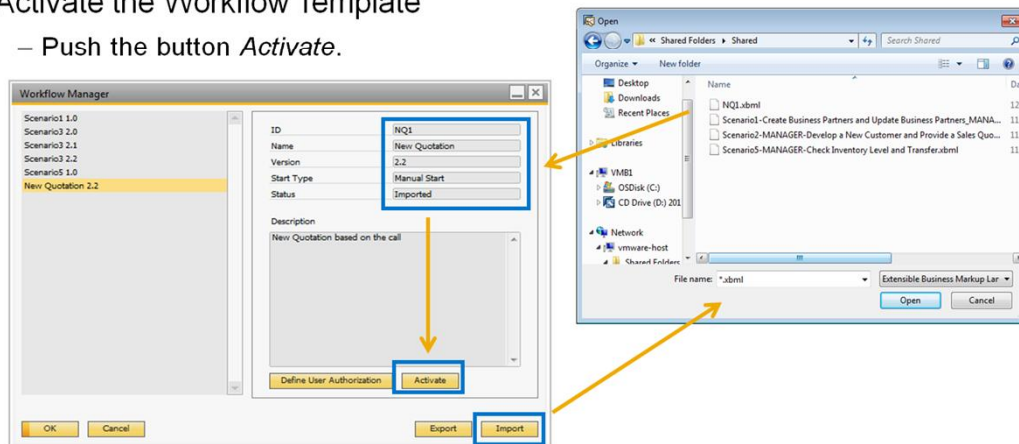
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- Let us review how to import and activate the Workflow Process Template in SAP Business One.

Activating Workflow in SAP Business One

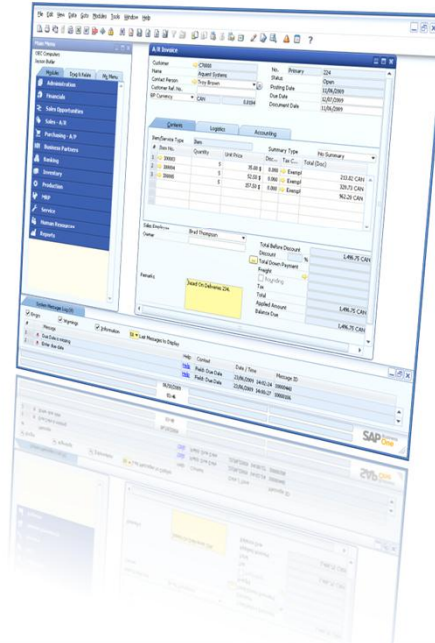
At first, the Workflow Template has to be Imported and then Activated:

- Go to **Administration** → **Workflow** → **Workflow Manager**
- Import the Workflow Template
  - Push the button *Import* and select relevant .xbml file.
- Activate the Workflow Template
  - Push the button *Activate*.



- At first, the Workflow Template has to be Imported and then Activated:
- Go to **Administration** → **Workflow** → **Workflow Manager**
- Import the Workflow Template
  - Choose the *Import* button and select relevant .xbml file.
- Activate the Workflow Template
  - Choose the *Activate* button.

Demo: Activating Workflow in SAP Business One



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- Go to **Administration** → **Workflow** → **Workflow Manager**
- Import the Workflow Template
  - Push the button *Import* and select relevant .xbml file.
- Activate the Workflow Template
  - Push the button *Activate*.

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- Finally, we will review how to process and monitor the Workflow in SAP Business One.

Processing Workflow in SAP Business One

Once the Workflow Template is activated, it can be started. Based on the type of Start Event element used in the particular Workflow Template, it can be started by:

- Start Event 
  - Workflow must be started manually in **Administration → Workflow → Workflow Instance**
- Time Start Event 
  - Workflow is started automatically by Workflow Service upon specific time.
- Conditional Start Event 
  - Workflow is started automatically by Workflow Service when a specific condition is met.

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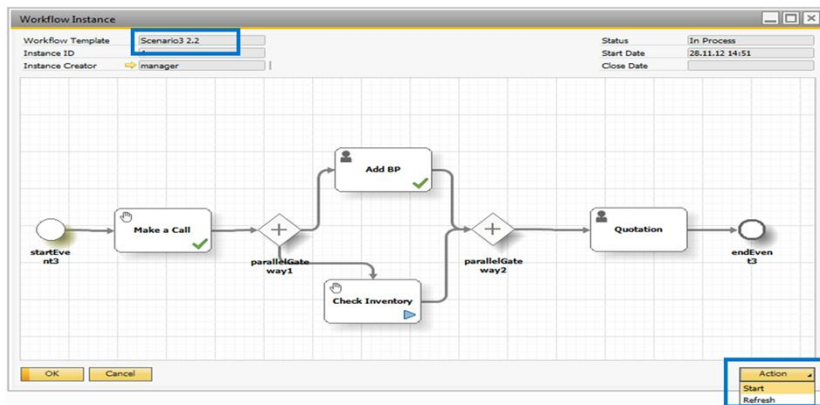
- Please refer to slide 13 describing Event Elements which can be used during the design phase.

Note!

Workflow service checks the conditions defined in the Conditional Start Events every 10 minutes to see if any instances need to be started. This interval can be adjusted in the Configuration File of the Workflow Service, for details refer to [How to Configure the Workflow Service and Design the Workflow Process Templates.pdf](#).

Processing Workflow in SAP Business One

- The action **Start** generates the new Workflow Instance.
- In **Administration → Workflow → Workflow Instance** you can see the details of Workflow Instances
  - The blue arrow sign shows which task is currently being processed
  - The green check sign shows which task has been already completed
  - Double click on the specific element to see the details



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- The Workflow is started either automatically (Time or Conditional Start Event) or needs to be started manually (Start Event).
- In case that particular Workflow needs to be started manually, go to **Administration → Workflow → Workflow Instance**, select the relevant Workflow Template and choose the Action **Start**.
- The action **Start**, regardless whether it was automatic or manual, generates the new Workflow Instance.
- In **Administration → Workflow → Workflow Instance** you can see the details of Workflow Instances
  - The blue arrow sign shows which task is currently being processed
  - The green check sign shows which task has been already completed
  - Double click on the specific element to see the details

Note!

Only one instance of the specific workflow template with Conditional Start Event can be active. Only when this instance is completed, another instance

of this workflow template can be started.

Processing Workflow in SAP Business One

- The processing of Workflow Instance is controlled by Workflow Service.
- Based on the definition of the tasks and their allocation to the users in the Workflow Template the Workflow Service assigns these tasks to specific users' *Workflow Worklist*.
- One task can be assigned to more users.
- In the *Workflow Worklist* each user can see the list of tasks to be processed by him.
- Go to **Administration → Workflow → Workflow Worklist** to check what tasks are to be processed by you.

#	Task ID	Task Name	Workflow Template	Instance ID	Enter Date	Due Date	Status	Pick Up
1	13	Stock Transfer	Scenario5 1.0	8	04.12.12	05.12.12	To be Picked	☒
2	9	Check Inventory	Scenario3 2.2	4	28.11.12	28.11.12	In Process	☒
3	5	Add BP	Scenario3 2.1	3	28.11.12	28.11.12	In Process	☒

Task Preview
Stock Transfer

Refresh Details Pick Up

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Processing Workflow in SAP Business One

- When a user wants to process the particular task, he must at first Pick Up this task.
- When the specific task is Picked Up, the user become the Owner of this task, so nobody else can process the same task in parallel, even if more users are assigned to the same task.

Workflow Worklist

#	Task ID	Task Name	Workflow Template	Instance ID	Enter Date	Due Date	Status	Pick Up
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2	9	Check Inventory	Scenario3 2.2	4	28.11.12	28.11.12	In Process	☒
3	5	Add BP	Scenario3 2.1	3	28.11.12	28.11.12	In Process	☒

Task Details

Task ID: 13
 Task Name: Stock Transfer
 Task Type: User Task
 Priority: Medium
 Status: In Process
 Enter Date: 04.12.12
 Due Date: 05.12.12

Owner: manager

Input Data: # Object Code
 Output Data: # Object Code
 Inventory Transfers

Buttons: Refresh, Details, Pick Up, Cancel, Forward, Process

- When a user wants to process the particular task, he must at first Pick Up this task (does not apply to Script Task).
- When the specific task is Picked Up, the user become the Owner of this task, so nobody else can process the same task in parallel, even if more users are assigned to the same task.
- Go to **Administration** → **Workflow** → **Workflow Worklist** and *Pick-up* the Workflow Task.

Processing Workflow in SAP Business One

- Once the task is Picked Up, it can be Processed.
- The task can be Processed by the user, who Picked Up this task, or it can be Forwarded for processing to any other SAP Business One user.

The screenshot shows three overlapping SAP Business One windows. The 'Task Details' window is in the foreground, showing a task named 'Stock Transfer' with status 'In Process'. It has tabs for 'General', 'Note', and 'Attachment'. The 'General' tab is active, showing fields for Owner (manager), Participants (manager), Duration (12 Days), Instance ID (8), Instance Creator (Workflow), and Description (Stock Transfer). Below these are 'Input Data' and 'Output Data' tables. The 'Output Data' table has one row with 'Inventory Transfers'. At the bottom of the 'Task Details' window are 'Forward' and 'Process' buttons. The 'List of Users' window is in the background, showing a table of users with columns for User Name, Department, Branch, and User Code. The 'Inventory Transfer' window is also in the background, showing fields for Business Partner, Number, Series, Posting Date, Document Date, From Warehouse, To Warehouse, Price List, and a table for Contents. Arrows point from the 'Forward' and 'Process' buttons in the 'Task Details' window to the 'List of Users' and 'Inventory Transfer' windows respectively.

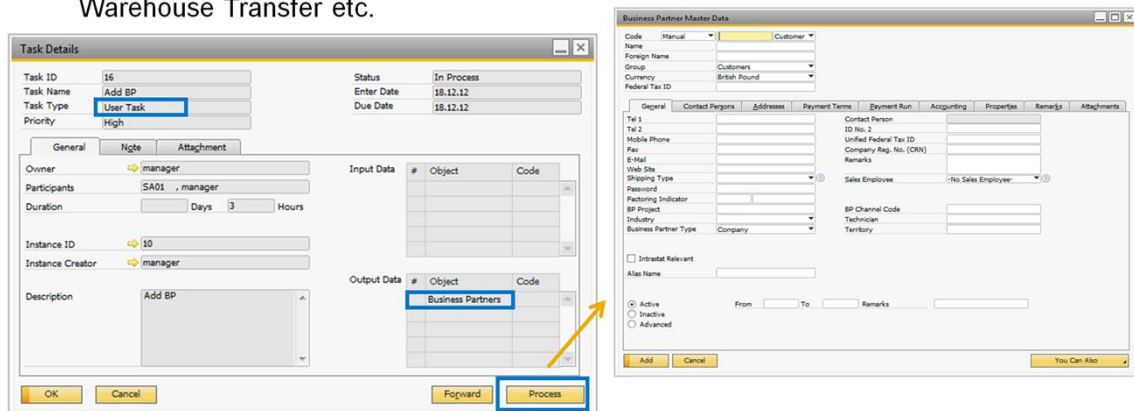
- Once the task is Picked Up, it can be Processed.
- The task can be processed by the user, who Picked Up this task, or this user can Forward it for processing to any other user.
- Go to **Administration → Workflow → Workflow Worklist**, open the *Task Details* of relevant Workflow Task, and then *Forward* it to another person or *Process* it.

Processing Workflow in SAP Business One

Based on the task type, the Workflow requires different type of activities:

- **User Task**

- Indicates the tasks that users need to process in SAP Business One.
- User needs to Add or Modify the specific object in SAP Business One
- Examples of such objects are Sales Quotation, Business Partner Master Data, Warehouse Transfer etc.



The screenshot displays two SAP Business One windows. The 'Task Details' window on the left shows a task with ID 16, name 'Add BP', and type 'User Task'. The 'Process' button is highlighted with a blue box. An arrow points from this button to the 'Business Partners' entry in the 'Output Data' table. The 'Business Partner Master Data' window on the right shows the 'General' tab with fields for Name, Address, and Contact Person.

Based on the task type, the Workflow requires different type of activities:

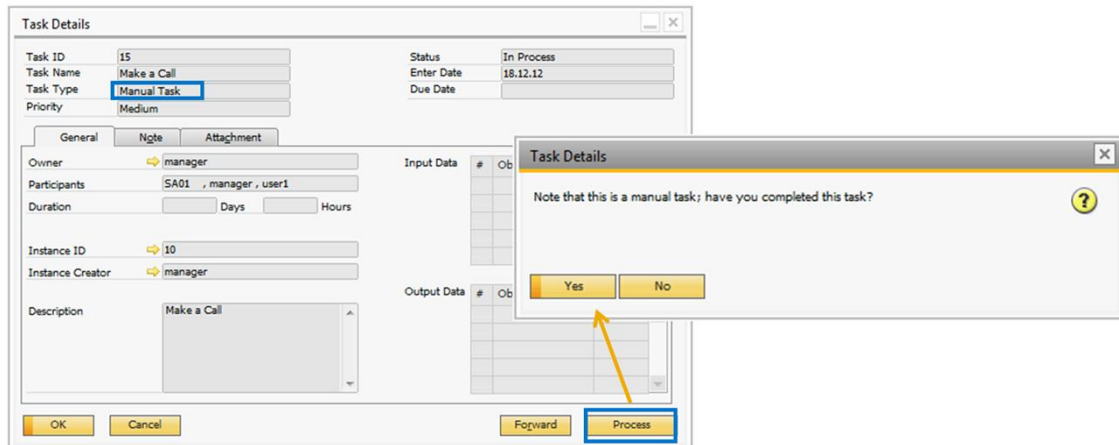
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- User needs to Add or Modify the specific object in SAP Business One
- Examples of such objects are Sales Quotation, Business Partner Master Data, Warehouse Transfer etc.

Processing Workflow in SAP Business One

- **Manual Task**

- Indicates the tasks that users process outside SAP Business One, for example, making a phone call or scheduling a meeting.
- In SAP Business One user just indicates, that the specific task is complete.



The screenshot shows the 'Task Details' dialog box in SAP Business One. The 'Task Type' field is set to 'Manual Task'. A confirmation dialog box is overlaid, asking 'Note that this is a manual task; have you completed this task?' with 'Yes' and 'No' buttons. The 'Process' button is highlighted in the main dialog.

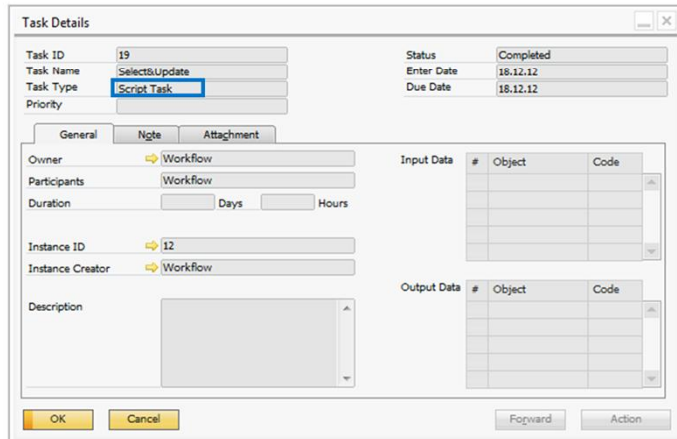
- **Manual Task**

- Indicates the tasks that users process outside SAP Business One, for example, making a phone call or scheduling a meeting.
- In SAP Business One user just indicates, that the specific task is complete.

Processing Workflow in SAP Business One

- **Script Task**

- Indicates the tasks that the workflow service processes automatically. Use JavaScript to define script tasks.
- Script Task does not require any user interaction.

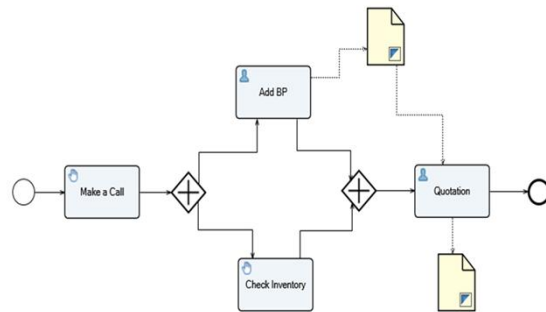


- **Script Task**

- Indicates the tasks that the workflow service processes automatically. Use JavaScript to define script tasks.
  - This type of the task does not require any user interaction.
  - Workflow service processes the scripts by default in 10 minutes interval.
  - This interval can be adjusted in the Configuration File of the Workflow Service, for details refer to [How to Configure the Workflow Service and Design the Workflow Process Templates.pdf](#).
- Please refer to slide 14 describing Task Elements which can be used during the design phase.

Processing Workflow in SAP Business One

- Once the task is completed, the Workflow Service based on the Workflow Template design continues to the next step in the flow.
- If the next step in a task element, Workflow Service generates this task as a new record in the assigned users' worklists.
  - user can view all the tasks assigned to him in **Administration → Workflow → Workflow Worklist**
- If the next step is Gateway Element, then the Workflow Service based on the Gateway Element type:
  - splits the flow into multiple flow paths, or
  - based on the flow condition selects the path to be processed
- When the End Event is reached, the Workflow Instance is completed.



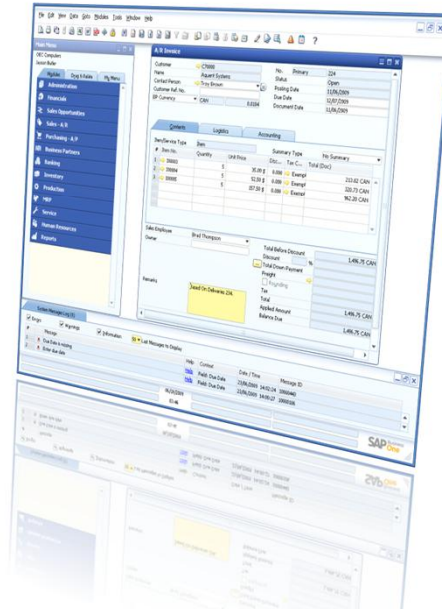
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Processing Workflow in SAP Business One

- Workflow processes can be monitored in following menu options:
- Go to **Administration → Workflow → Workflow Instance** to check status of specific Workflow Instance.
- Go to **Administration → Workflow → Workflow Worklist** to check what tasks are to be processed by you.
- Go to **Administration → Workflow → Workflow Tracking** to get an overview of all Workflow instances.

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Demo: Processing Workflow in SAP Business One



Summary



You should now be able to

- Explain the concept of the Workflow in SAP Business One.
- Recognize key elements used in the Workflow Template.
- Activate and process the Workflow in SAP Business One.

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