

## G/L New Account - Workflow Template Example

### BUSINESS REQUIREMENT

This example is described in details in [Extender Workflow 101 Training video](#)

This G/L New Account workflow template is designed to be started automatically when a new G/L Account is inserted. The account will be set to "Inactive".

### KEY LEARNINGS

- Automatic workflow, started when a G/L Account is inserted
- Demonstrates most commonly used Extender Configurator actions
- This template doesn't include any custom actions.

### SAMPLE FILES

Workflow Template example- You can import the ***G/L Account New Workflow.xls*** file

Go to Extender Setup > Workflow Templates > Import.

Continue the setup as per below.

Requires Extender PU6.00 or above

### EXTENDER SETUP KEY STEPS

Refer to F1 help and online help

- Configure SMTP Email settings in Extender Options (Email Tab)
- Add message templates (In the example workflow, the following templates are used: ***WFGLNEWACCOUNT*** when a GL is inserted and ***WFGLNEWACCOUNTERR*** when a critical error is encountered) (Extender Setup > Message Templates )
- Create User Group ***MANAGER*** and add Sage 300 users that are in the Team to approve workflow. (Workflow User Groups)
- Add Workflow colours. ***Urgent*** and ***Complete***

## Extender Workflow Example

- Create a "Workflow Template" in Extender Setup > Workflow Templates or import attached file
- To attach the workflow to a Sage 300 view, refer to Attach workflow to View on page 5
- To configure workflow icons on screens, refer to Configure Information Manager on page 5

For details, refer to [Workflow Templates - Screen Guide](#) and the training video.

EXTLTD - Flowchart Templates

FileHelp

Template ID

GL New Account workflow

Description

GL New account workflow - when a GL Account is inserted

Active

Active

Auto Delete instance when complete?

Yes

Can start manually?

No

Can start multiple instances?

Yes

MarkAsRead can progress to.

Lin...	Step Name	Description	Entry Step	Para...
1	NewAcct	New account created	Yes	
2	Wait	Waiting for user to complete wf	No	
3	MarkAsRead	Mark alert as Read and complete wf	No	

Lin...	Step ID	Parameter 1	Parameter 2	Parameter 3	Parameter 4
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Step Actions - Executed when a workflow enters this step

Lin...	Action #	Action Name	Name	Label	Type(List...	De...
1	10	AddParameter	AccountComment	Account Com...	text(size=60)	
2	20	AddParameter	GLUser	GL User	user	
3	30	AskForParameters				
4	40	AssignColour	Complete			
5	50	SetValue	WFCOMMENT	MarkedAsRead		
6	60	SetStatus	Complete			
7	70	Complete				
8	80	GoToStep	Wait			

Workflow Values

Name	Value
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SaveDelete

Close

## WORKFLOW CONFIGURATION

Template ID - The name cannot be updated after it is created

**Can start manually:** set to No as the workflow will start whenever a G/L Account is inserted and is attached to the GL0001 View Insert.

**Auto Delete instance when complete:** No - while testing.

You can set it to Yes later- if there are too many records in the Console, as the workflow history is accessible in the Log.

**Can start multiple instances:** Yes -

## WORKFLOW STEPS

**Add 3 steps** - The detailed actions for each steps are configured as per the training video.

## PROGRESS-TO STEPS

Progress-to steps are used when a user needs to select the next Step to progress the workflow. Progress-to steps add Controls to the workflow console. If workflow screen icons are configured in Information Manager, Progress-to steps can be run from the configured Sage 300 screen.

For an Approval workflow, the request can be Approved or Rejected.

- Select the Wait Step, add 1 steps that a user can select: MarkAsRead

## VALUES

Values are saved in the workflow and can be viewed in the workflow console and the workflow history logs. They can also used as variables in the workflow actions.

In this example, we have not configured default values, but we are updating a value called WFCOMMENT in the MarkAsRead step.

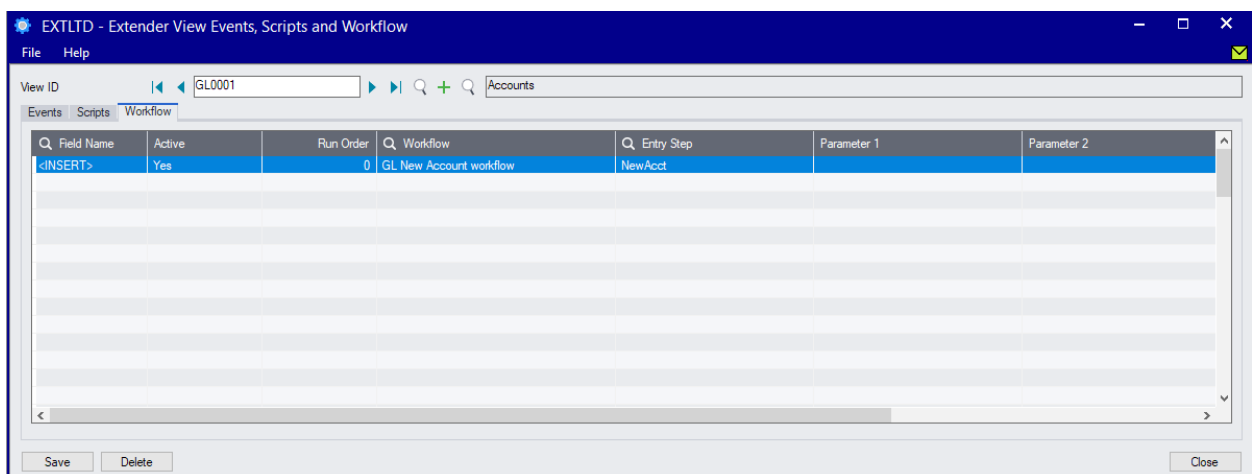
## ACTIONS

For each step, the template includes a series of actions to match the process flow requirements. Refer to video for detailed description.

Most workflows should include SetDrillDown, SetStatus and SetDescription as these actions populate details in the workflow that are used in the workflow console and the workflow history logs.

## ATTACH WORKFLOW TO VIEW

Note: Workflow can be added to Sage 300 Master files, Transaction header and batch views.



## CONFIGURE INFORMATION MANAGER

## ENABLE ORCHID USER

## Configure Orchid User

## Extender Workflow Example

Information Ma...

File Help

☒ Orchid User

Sharepoint

User nathalie@orchid.systems

Password XXXXXXXXXXXX

Hotkey F11

Last field

Roto ID

Field Name AccpacGrid

Save Cancel

### CONFIGURE ICONS ON SAGE 300 SCREEN

To view the workflow history and progress active workflow from the Sage 300 screen, configure Information Manager , I/M Setup > Options > Notes/DML/Extender Tray

As the workflow cannot be started manually, do not select an Entry Step.


In this example, we have not configured any parameters to pass to the workflow template.

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Tip: Use the F9 Zoom screen to view details.

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## Extender Workflow Example

 Details ✕

Line Number

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Type

Extender Workflow


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RotolD


Field label - {value}

Second Field label - {value2}

Workflow



Workflow Entry Step



Parameter 1

Parameter 2

Parameter 3

Parameter 4

The screenshot shows the 'EXT LTD - I/M Options' application window. The main window has a menu bar with 'File' and 'Help'. Below the menu bar is a tabbed interface with tabs for 'Contact', 'Notes/DML/Extender Tray', 'Note Categories', 'Report Runner', 'Email', 'Suppl. Data', 'Sharepoint', and 'Updates'. The 'Notes/DML/Extender Tray' tab is active, showing a table with columns: RotoID, Display Order, Field label, Second Field label, Type, InfoSet/..., Show In Alert, Folder, and Filter. The table contains one row with RotoID 'GL1100', Display Order '0', Field label 'ACCOUNT', Second Field label 'Extender Workflow', Type 'Extender Workflow', and Folder 'GL New Account workflow'. A 'Details' dialog box is open in the foreground, showing the configuration for the selected entry. The dialog has a 'Line Number' field (1), a 'Type' dropdown (Extender Workflow), and input fields for 'RotoID' (GL1100), 'Field label - {value}' (ACCOUNT), 'Second Field label - {value2}', 'Workflow' (GL New Account workflow), 'Workflow Entry Step', and four 'Parameter' fields. A 'Save' button is at the bottom left, and a 'Close' button is at the bottom right. A 'Note' at the bottom of the main window states: 'Note: If you change these settings you must restart/refresh the tray'.

RotoID	Display Order	Field label	Second Field label	Type	InfoSet/...	Show In Alert	Folder	Filter
GL1100	0	ACCOUNT	Extender Workflow	Extender Workflow			GL New Account workflow	

Details Dialog Box Fields:

- Line Number: 1
- Type: Extender Workflow
- RotoID: GL1100
- Field label - {value}: ACCOUNT
- Second Field label - {value2}:
- Workflow: GL New Account workflow
- Workflow Entry Step:
- Parameter 1:
- Parameter 2:
- Parameter 3:
- Parameter 4:

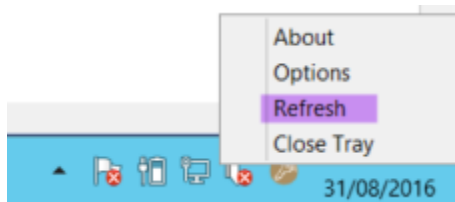
Note: If you change these settings you must restart/refresh the tray

## Extender Workflow Example

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**Note:** Remember to Refresh the Tray icon if you have made any changes on the IM Setup\Options in the current session as the Tray icon reads the current setup when the company is first opened. If you have multiple Tray icons, Close the Sage 300 desktop and re-open to refresh the configuration.

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## TESTING EXTENDER WORKFLOW SETUP

The workflow is started when a G/L Account is inserted (on the Sage 300 screen or if inserting records using the Sage 300 views).

### USING THE WORKFLOW CONSOLE

Go to Extender Console, notice the workflow instance record and check the email is sent.

Click on Values Tab to see the details.

Use history to view the steps that the workflow has been following.

Log on as a user in the Manager group. View the console,

- Click Mark As Read on the console.
- Drill down to the GL Account to open the GL Account screen.

### USING TRAY ICONS

Log on as a user who is assigned the workflow (or has rights to view or modify all workflows)

- Find the G/L Account
- Click on the Workflow icon, Select Mark As Read if the workflow is in progress
- If the workflow icon is grey, the workflow is complete, you can view the history.

**Requirement!** This functionality is available in Extender Levels Configurator, Customizer and Developer.

To use the Workflow console and the Tray Icon on the Sage 300 screens, you need to install Information Manager and configure the user as an "Orchid User".