Exercise - Create a purchase requisition workflow

The Finance and Operations module that you're working in determines the types of workflow that you can create.

In this exercise, you will create a purchase requisition workflow. Before a purchase requisition can be submitted for review, you need to configure the workflow.

Create and set up workflows

1. Go to **Procurement and sourcing > Setup > Procurement and sourcing workflows**.
2. On the list page that appears, on the Action Pane, select **New**.
3. On the **Create workflow** page, select the **Purchase requisition line review**.
4. For the first time, the browser will show a dialog box to open the **Microsoft.Dynamics.AX.Framework.WorkflowEditorHost.application** page.
5. Select **Open**.
6. Select **Run**. It takes a few minutes for the workflow editor to be downloaded. When it has finished the download, it automatically opens the **Sign in** dialog box.
7. Enter your credentials and password.
8. The workflow editor appears.

Drag workflow elements onto the canvas

1. To connect one workflow element to another, hold the pointer over an element until connection points appear.
2. Click a connection point and drag it to another element. Be sure to connect all the elements.
3. The **Workflow elements** area of the workflow editor contains the elements that you can add to your workflow.
4. To add elements to the workflow, drag **Review purchase requisitions** and **Approve purchase requisitions** onto the canvas.
5. Connect **Start** to **Review purchase requisitions**.
6. Connect **Review purchase requisitions** to **Approve purchase requisitions**.
7. Connect **Approve purchase requisitions** to **End**.

Configure workflow properties

1. Select **Review purchase requisitions** and, from the Action Pane, select **Properties** to open the **Properties** page.
2. Enter a value in the **Name** field.
3. Enter a value in the **Work item subject** field. Alternatively, you can also include a place holder and concatenate the text with the place holder.

4. Select the **Yellow** bar. This will navigate to the assignment type.
5. Select **User** and select the **User** tab.
6. Select a user and add it to the **Selected users** section.
7. Select **Close**.
8. Select **Save and close**.
9. Specify a version description.
10. Select **OK**.
11. Select **Activate the new version**.
12. Click **OK**. It might take a few minutes for the workflow editor to finish its activation process, and then it will close automatically.
13. Go to **Procurement and sourcing > Setup > Procurement and sourcing workflows**.
14. Refresh the page if you do not see your new workflow.