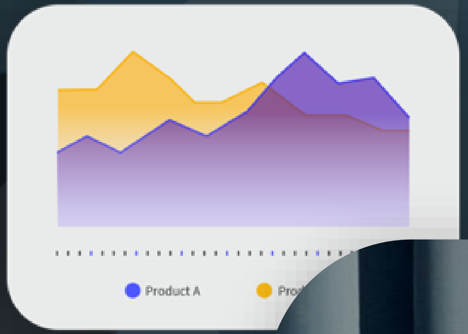
Workflows & AES

2025 SUN CONFERENCE: HANDS ON LAB

INDUSTRY SPECIFIC



CLOUDSUITE SOLUTIONS

Mary Zecca
Technical Solution Consultant

Feb 24: 4:00 PM – 5:00 PM Grand Ballroom F
Feb 26: 10:15 AM – 11:15 AM Grand Ballroom E

Agenda

01 Introduction & Access

02 Create Notification Workflow

03 Create External Workflow using Wizard

04 Test

infor

SUN

Application Event System

PROS:

- Part of Syteline, direct access
- No code development tool
- Built in inbox & email

CONS:

- Can seem complex to use/learn
- Requires deep understanding of MG & CSI Data

Intelligent Open Network

PROS:

- Application Independent
- Graphical user interface
- Centralized inbox, email & mobile app

CONS:

- Reactive, uses BODs as triggers
- Requires understanding of APIs to “write back” to ERP

infor

Application Event System & Intelligent Open Network

PROS:

- Part of Syteline, direct access
- No code development tool
- Graphical user interface
- Centralized inbox, email & mobile app
- Requires less understanding of MG & CSI Data
- No need to understand APIs
- Fully bi-directional, no longer just reactive
- Overall, less complex

Login Information

Monday
Feb. 24th @ 4pm

Username:
D1S11RF_**XX**

Password:
SUNConf$tuD1S11**XX**

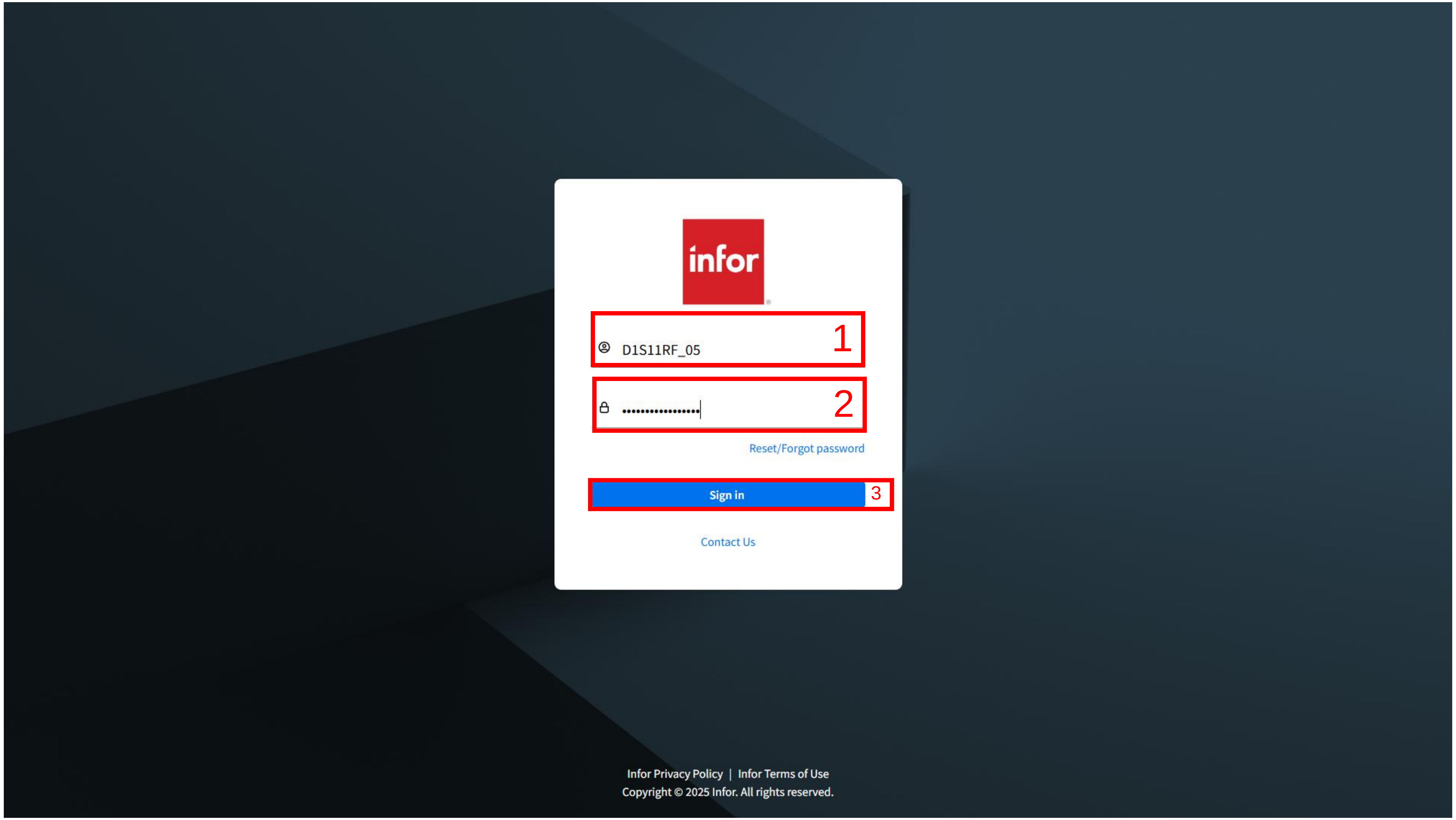
Replace XX with your student number

Wednesday
Feb. 26th @ 10:15am

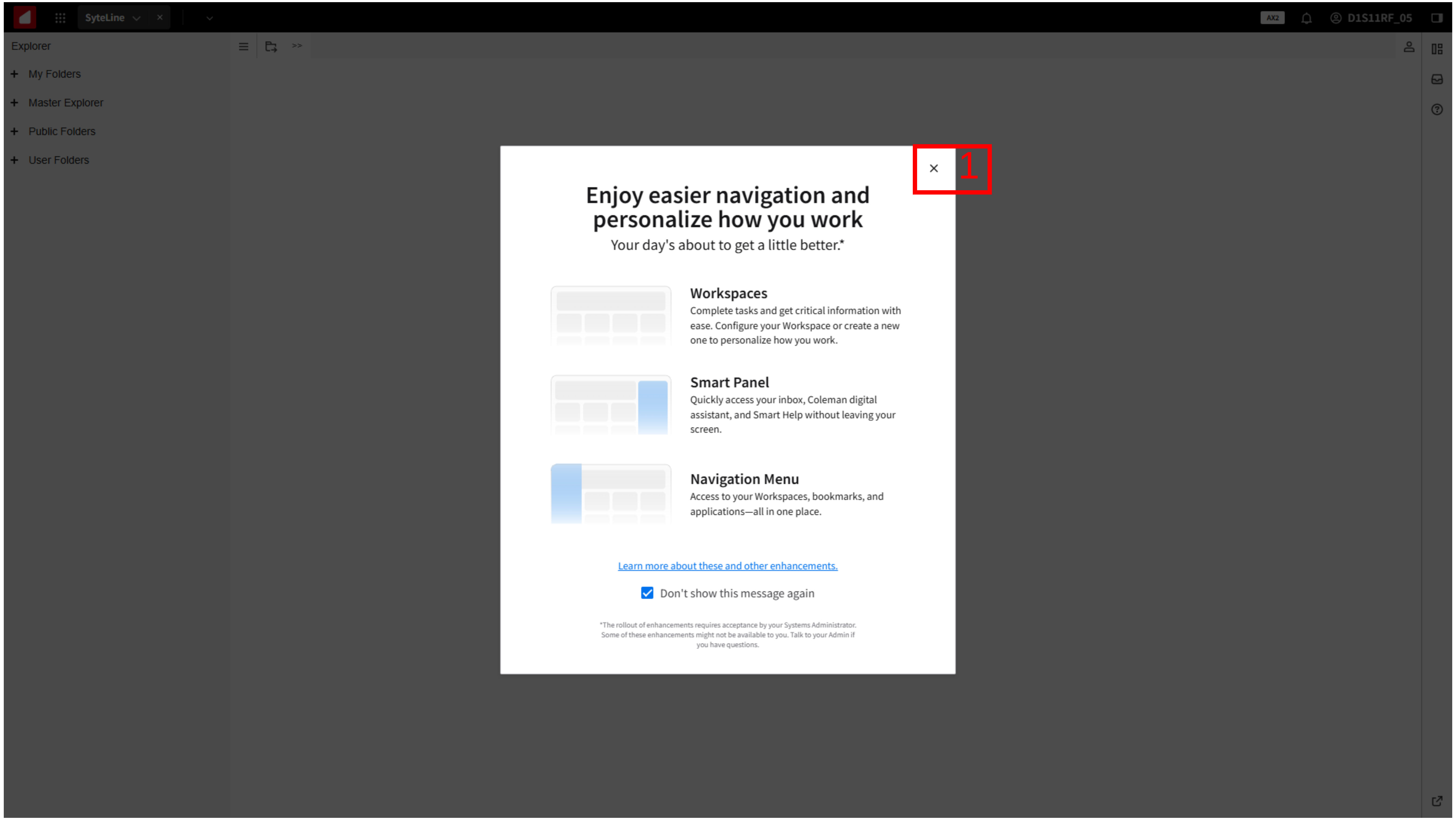
Username:
D3S11RE_**XX**

Password:
SUNConf$tuD3S11**XX**

Replace XX with your student number

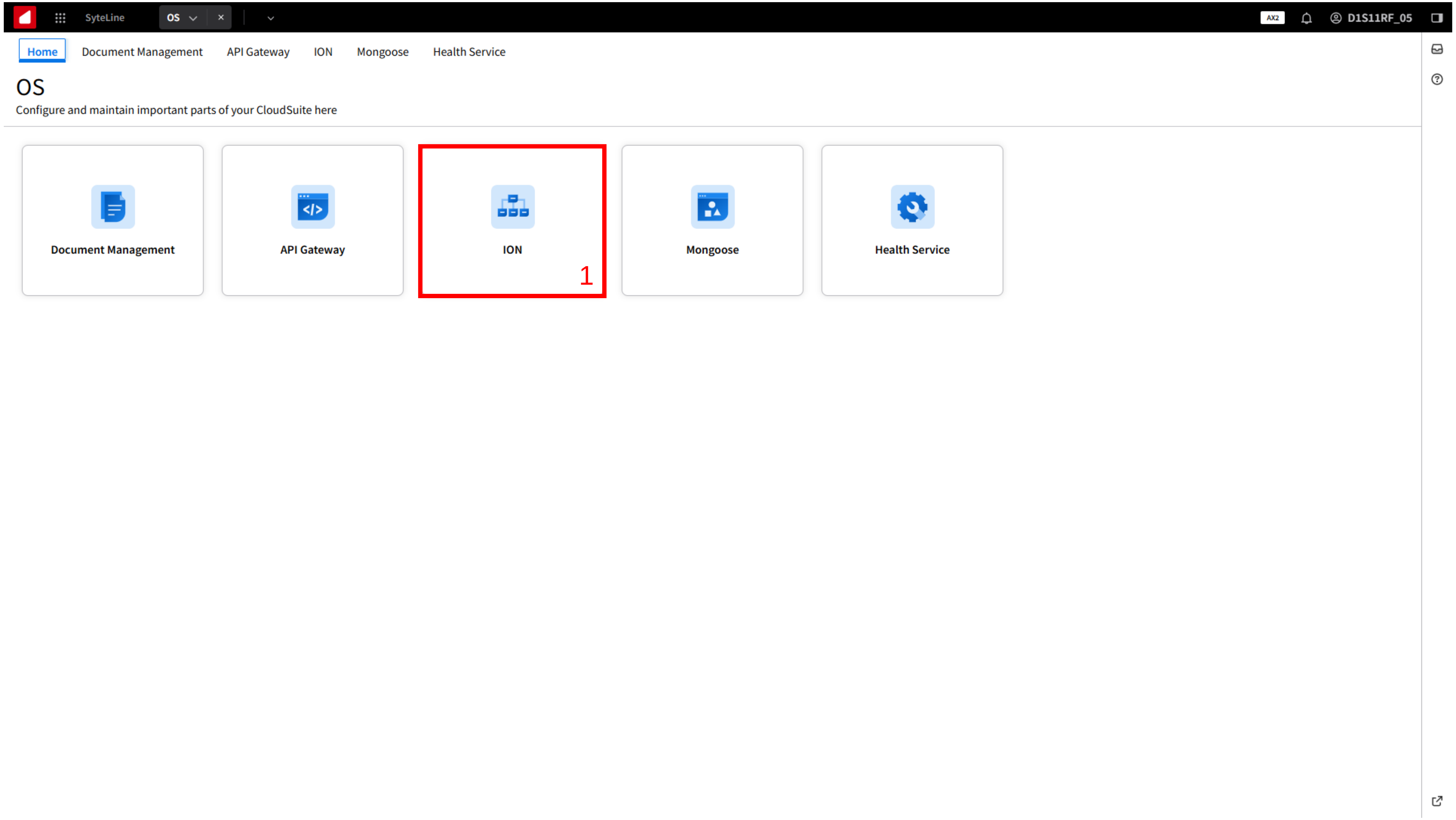


1. **ENTER** your username
2. **ENTER** your password
3. **SELECT** Sign in

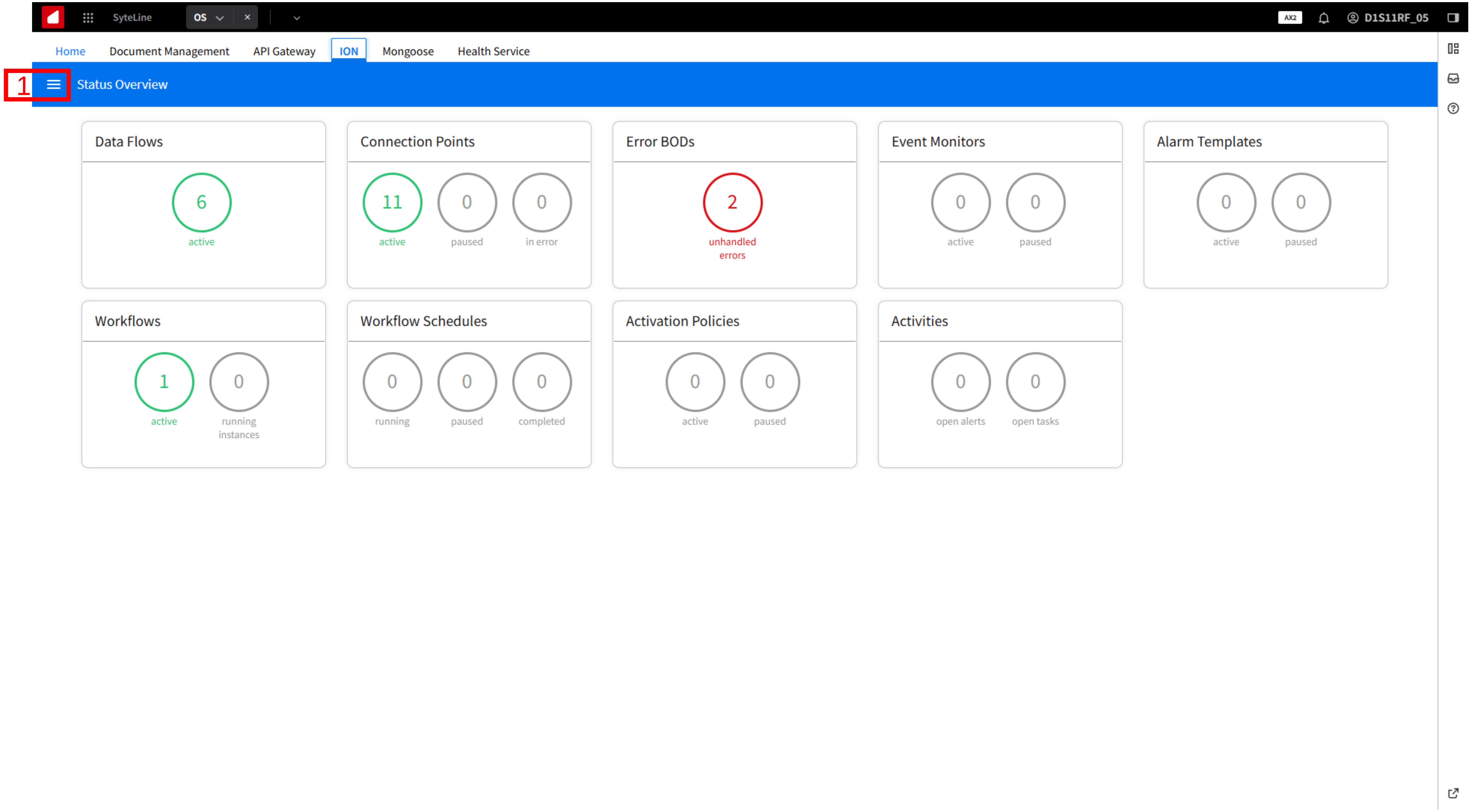


1. **CLICK** the X at the top right to close the message

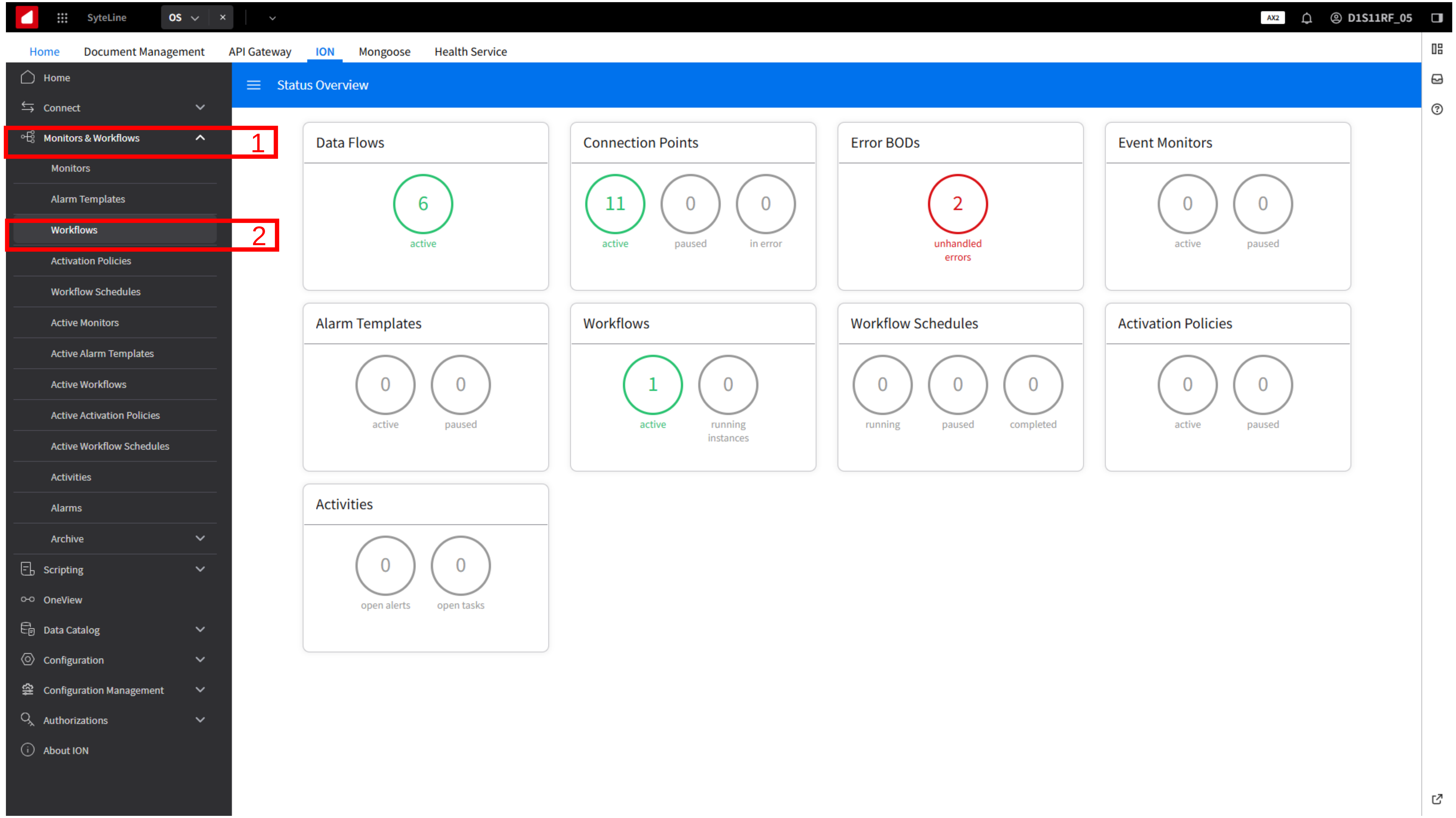
1. **CLICK** on the Navigation Menu in the top left
2. **ENTER** ‘OS’ in the search bar
3. **SELECT** OS under Applications



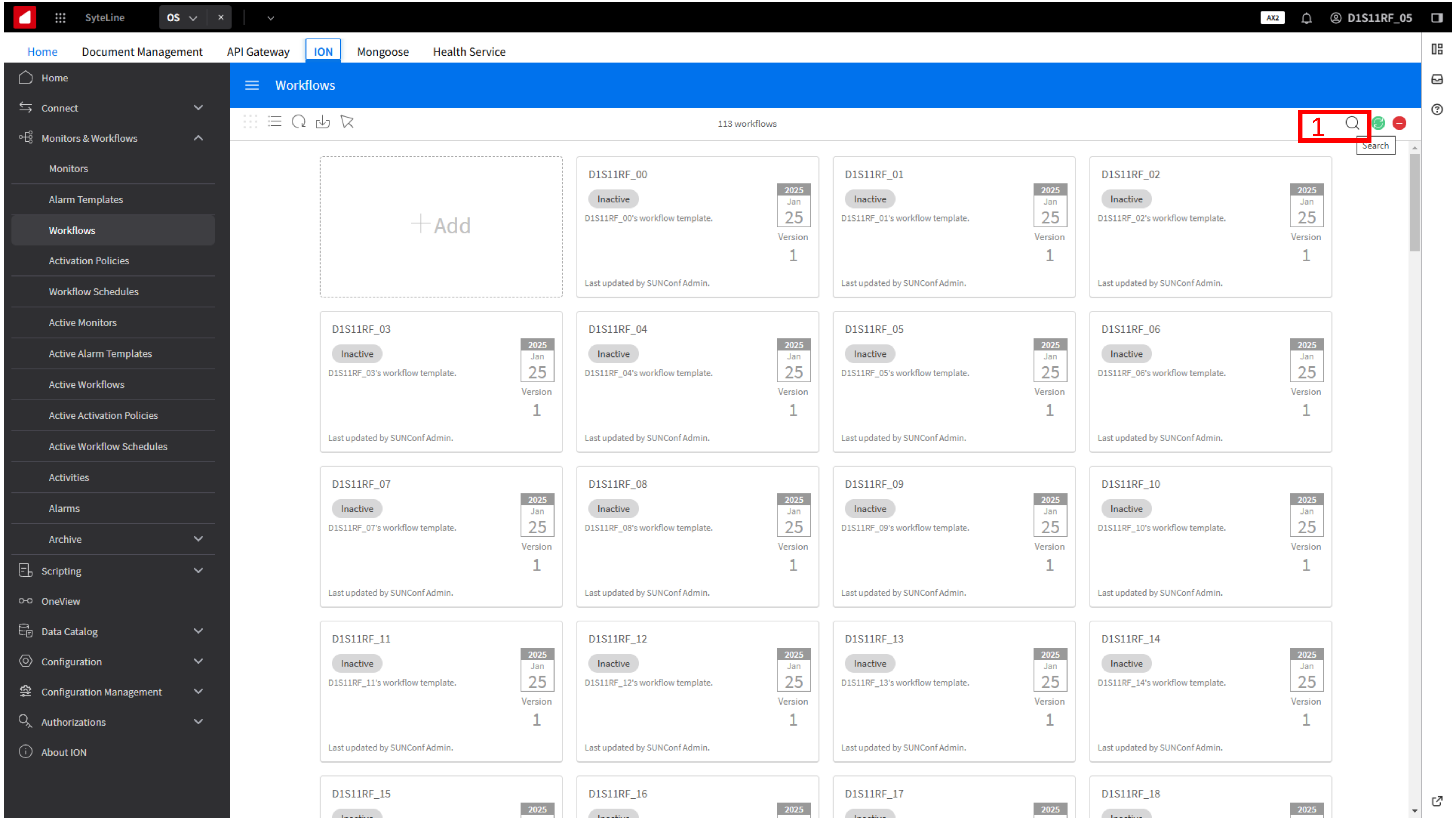
1. **CLICK** on ION



1. **CLICK** the Explorer button next to Status Overview

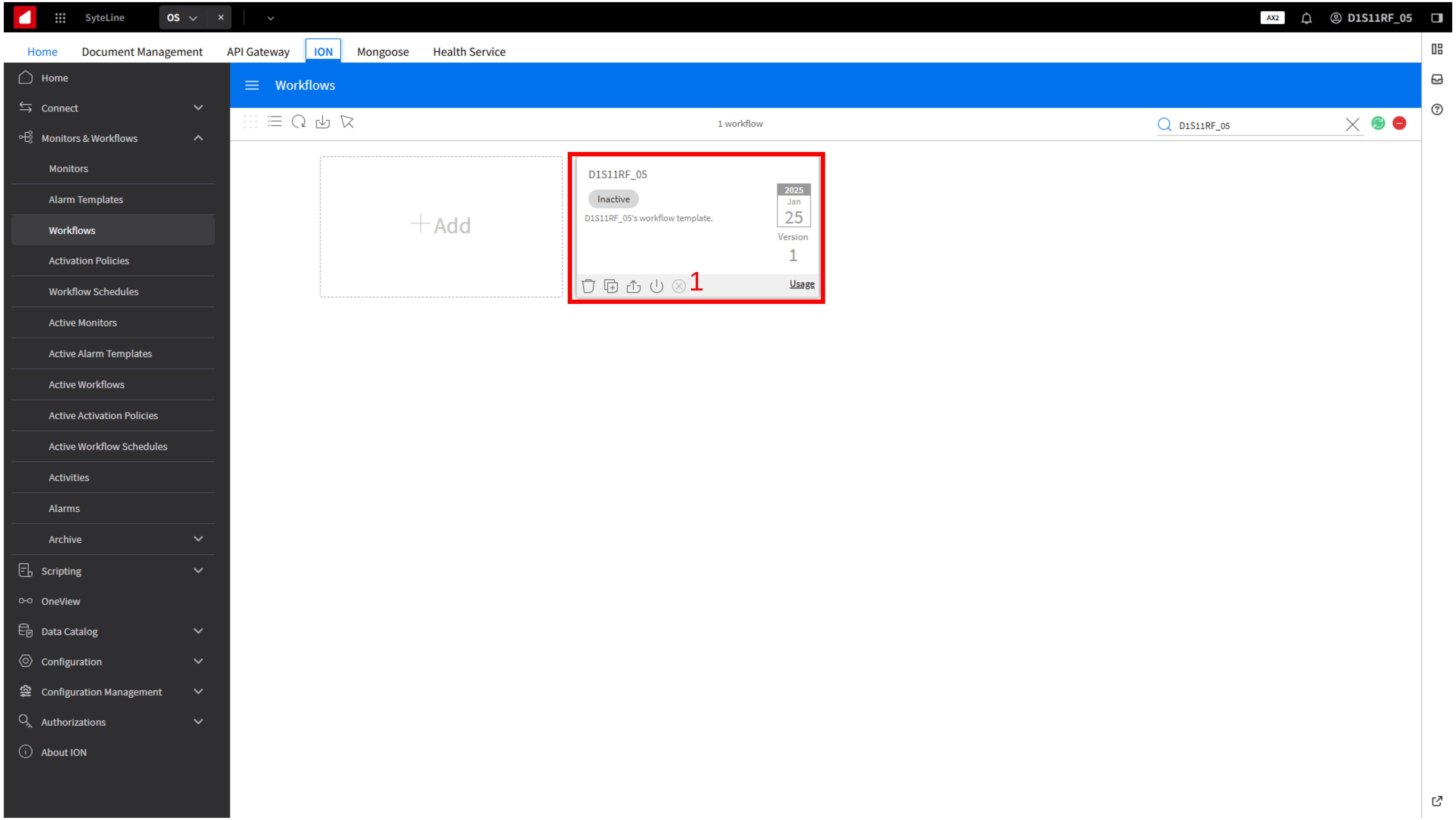


1. **SELECT** Monitors & Workflows
2. **SELECT** Workflows

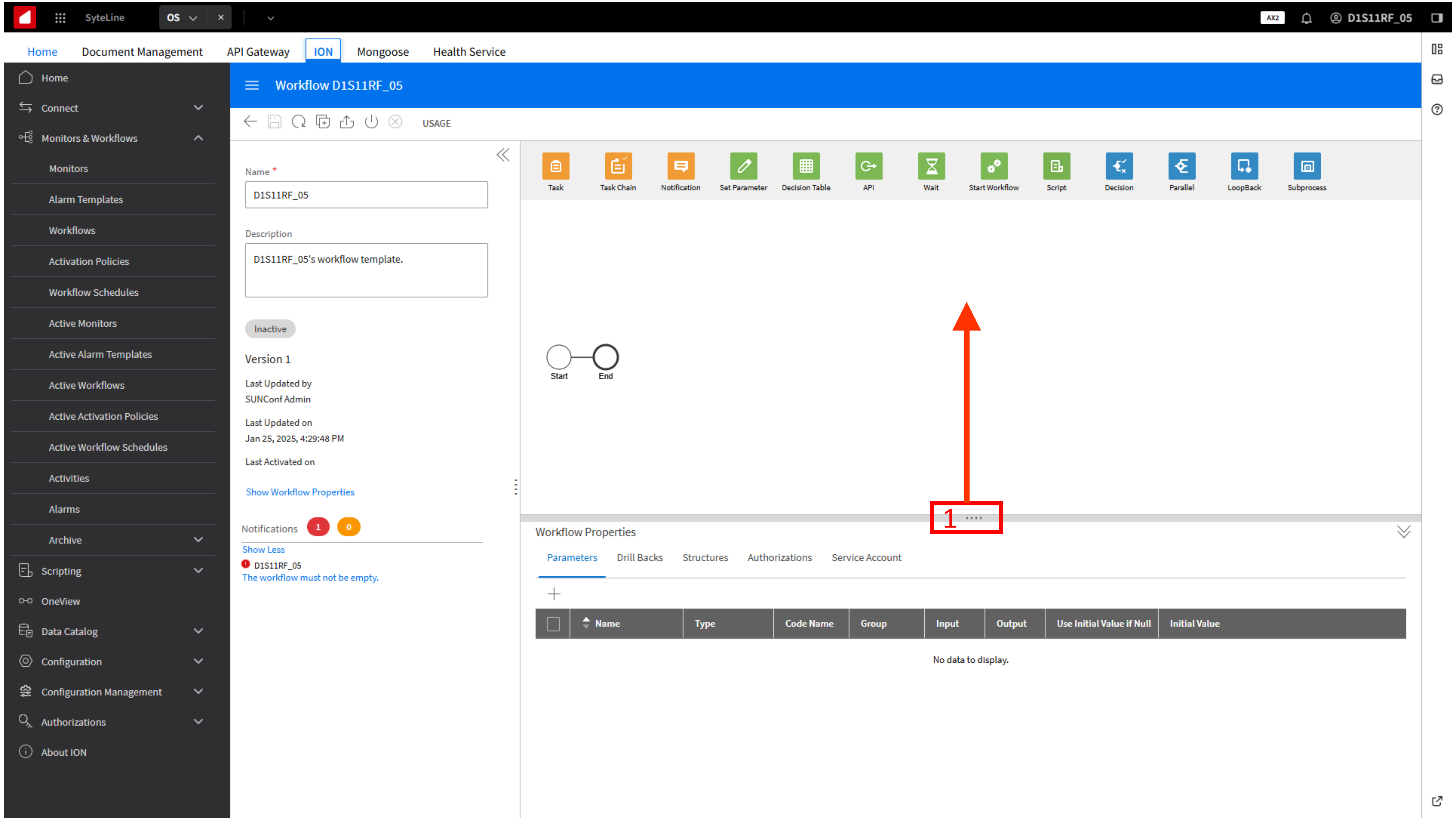


1. **CLICK** the Magnifying Glass and **ENTER** your username

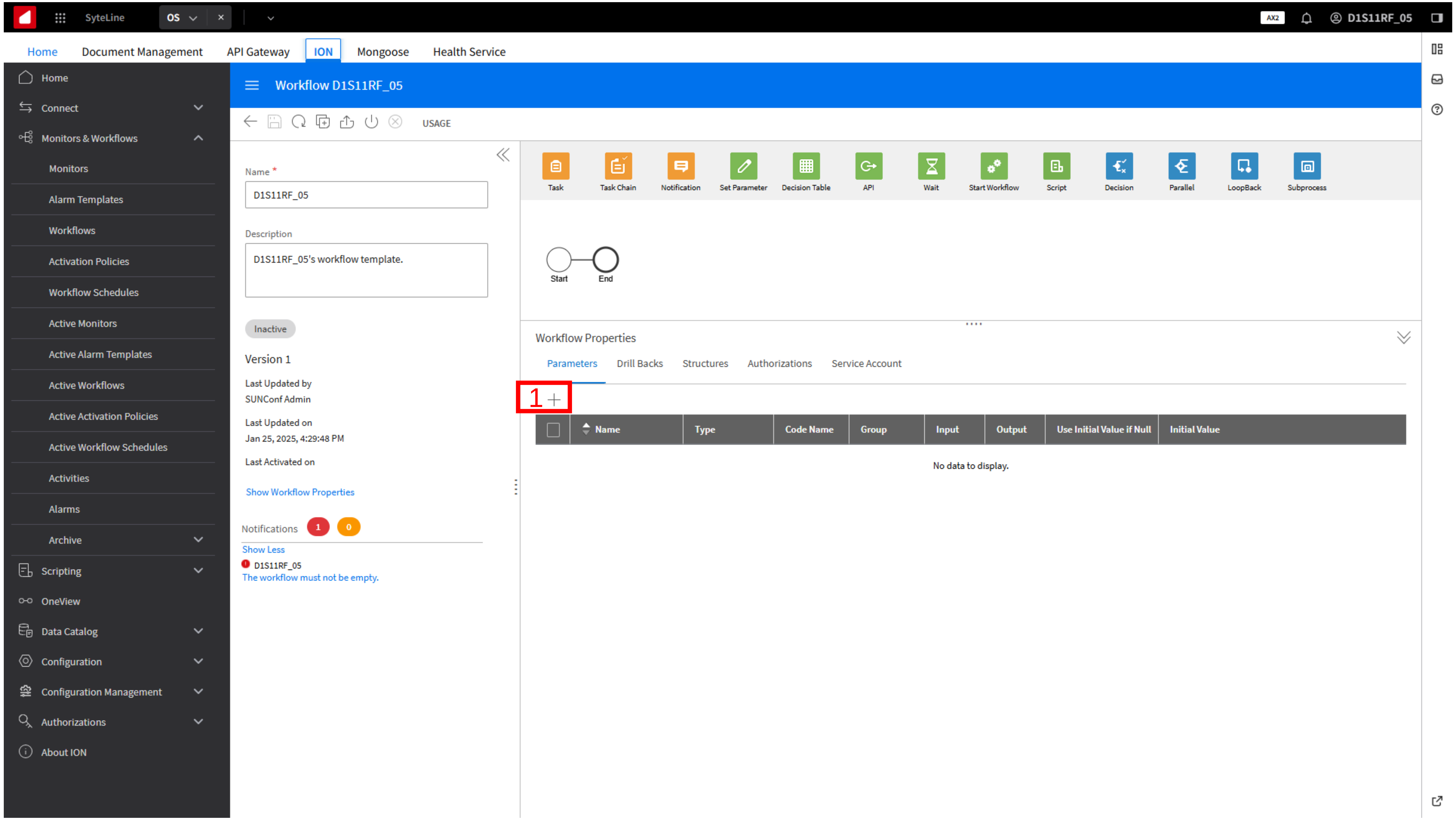
infor



1. **SELECT** the workflow that matches your username

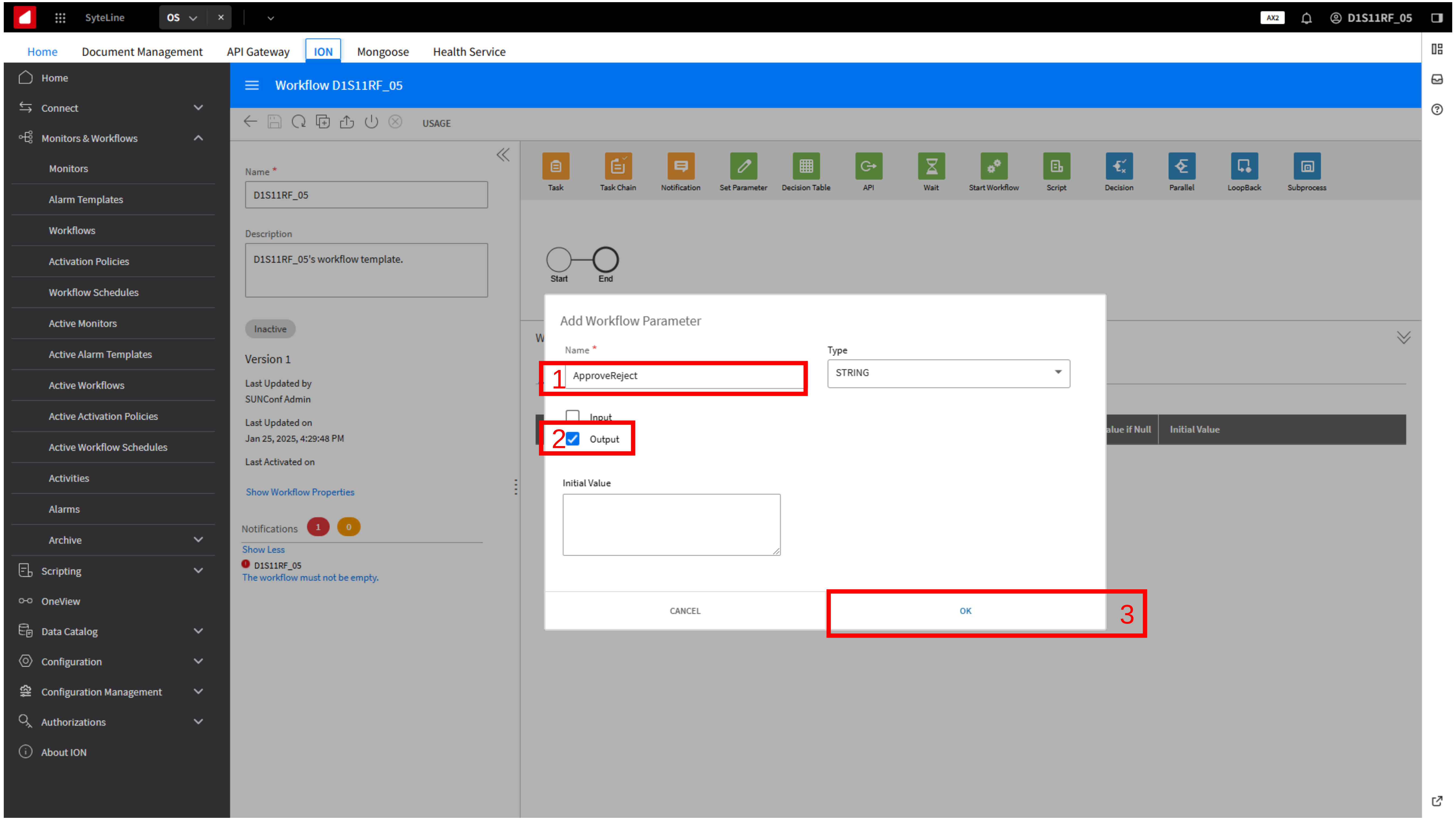


1. **CLICK** and **DRAG** the Workflow properties screen to increase the size

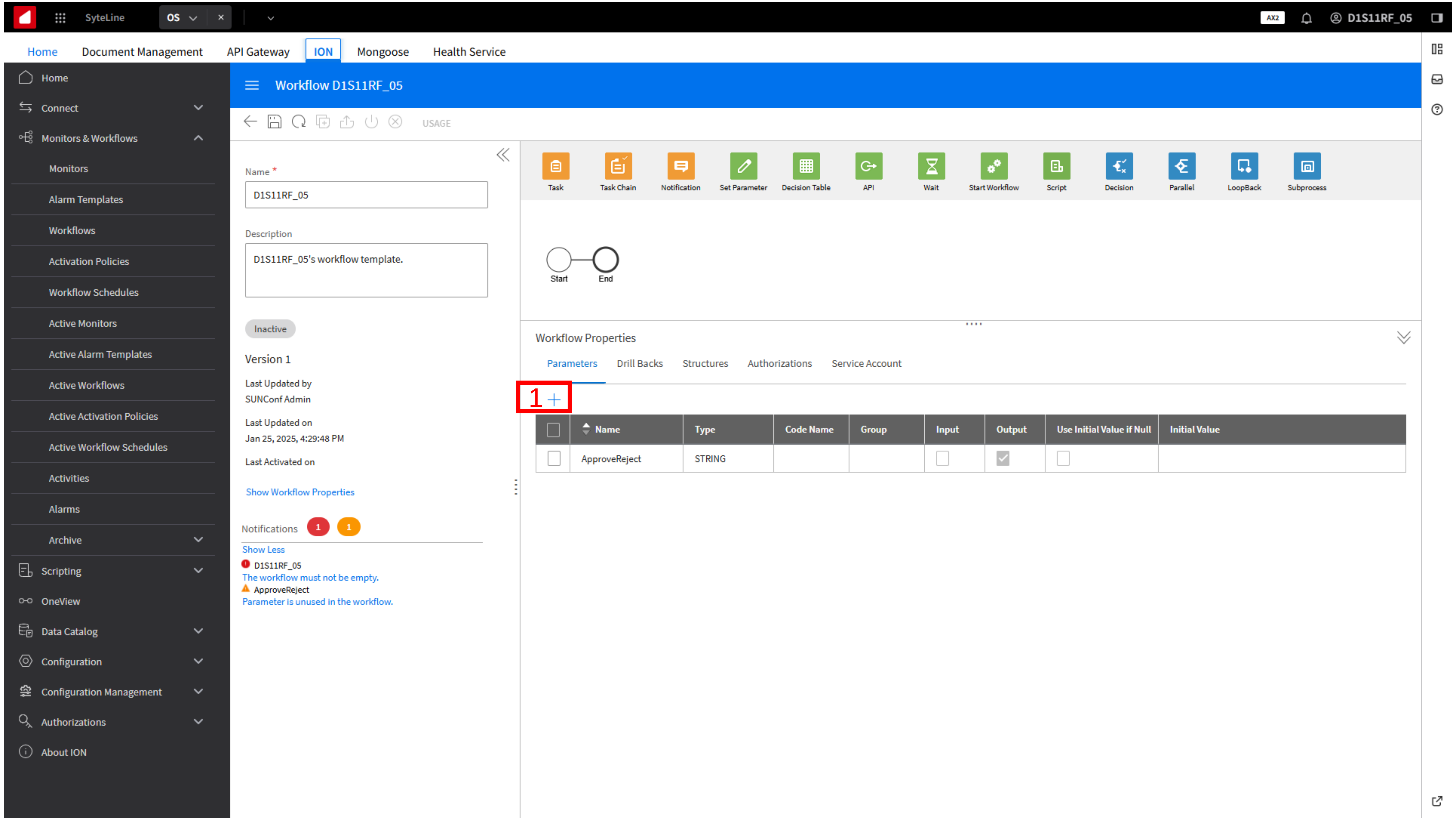


1. **CLICK** the '+' button under Parameters

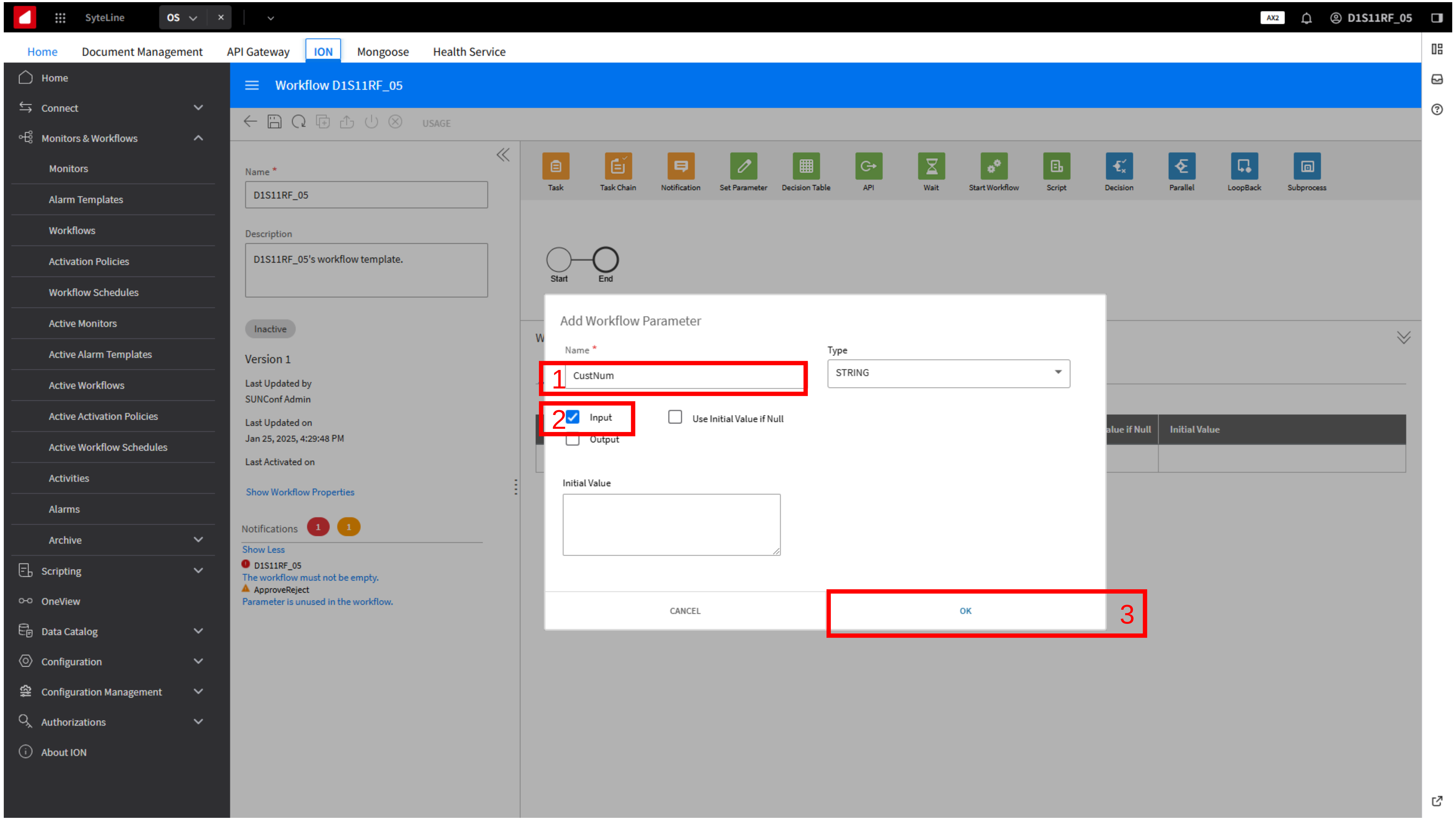
infor



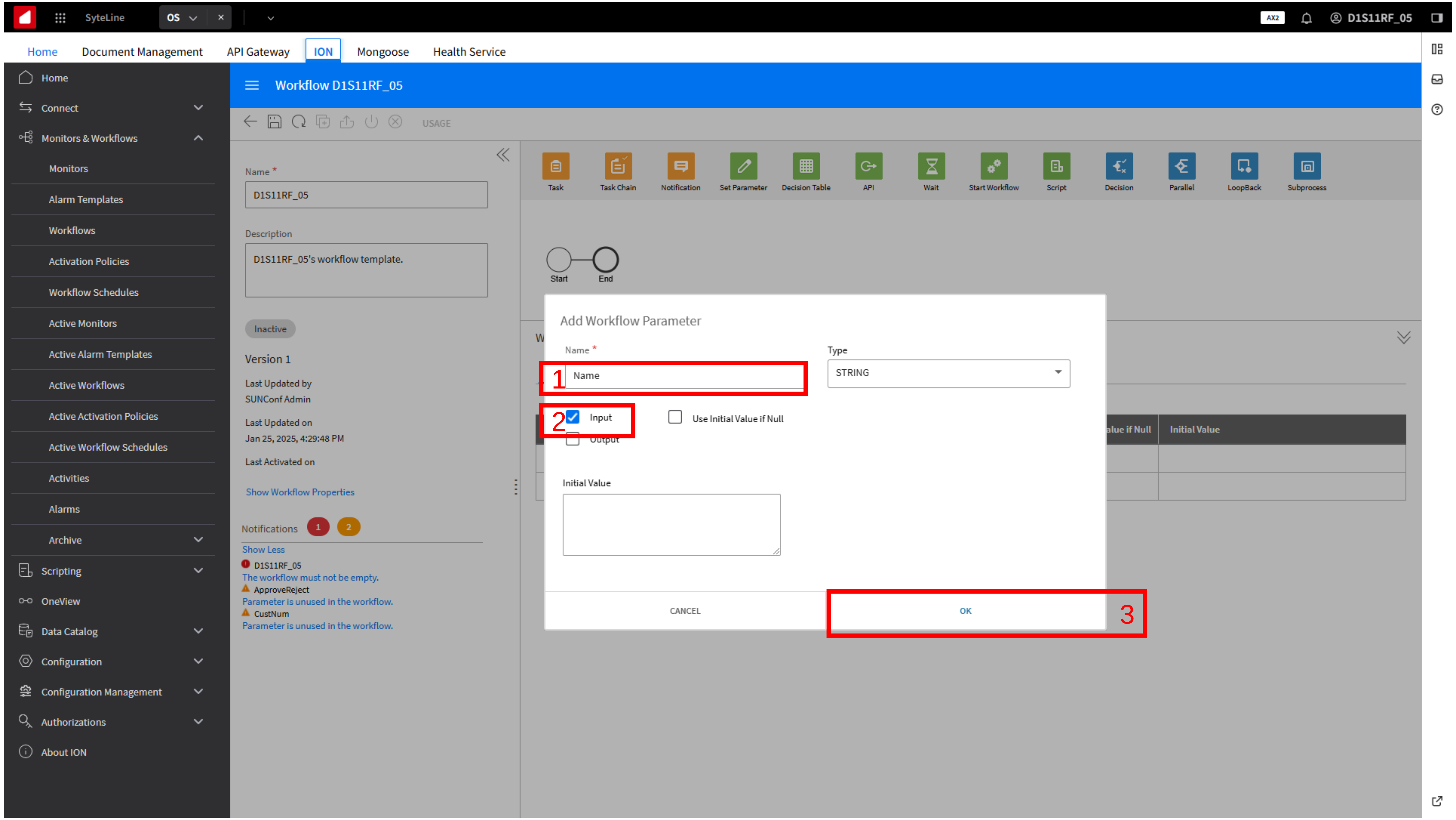
1. **ENTER** ‘ApproveReject’ under Name
2. **CHECK** Output
3. **CLICK** OK



1. **CLICK** the '+' button under Parameters

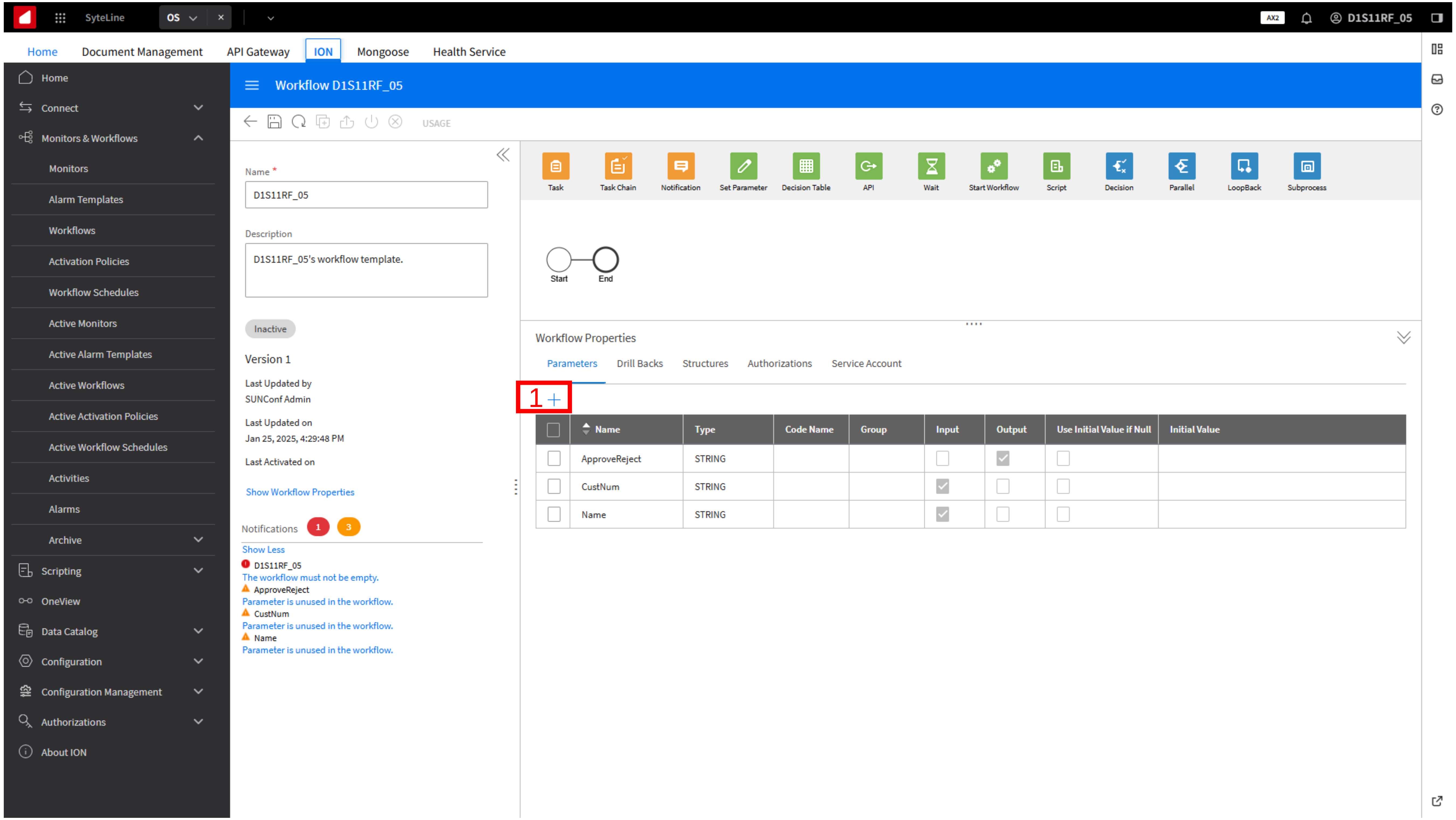


1. **ENTER** 'CustNum' under Name
2. **CHECK** Input
3. **CLICK** OK

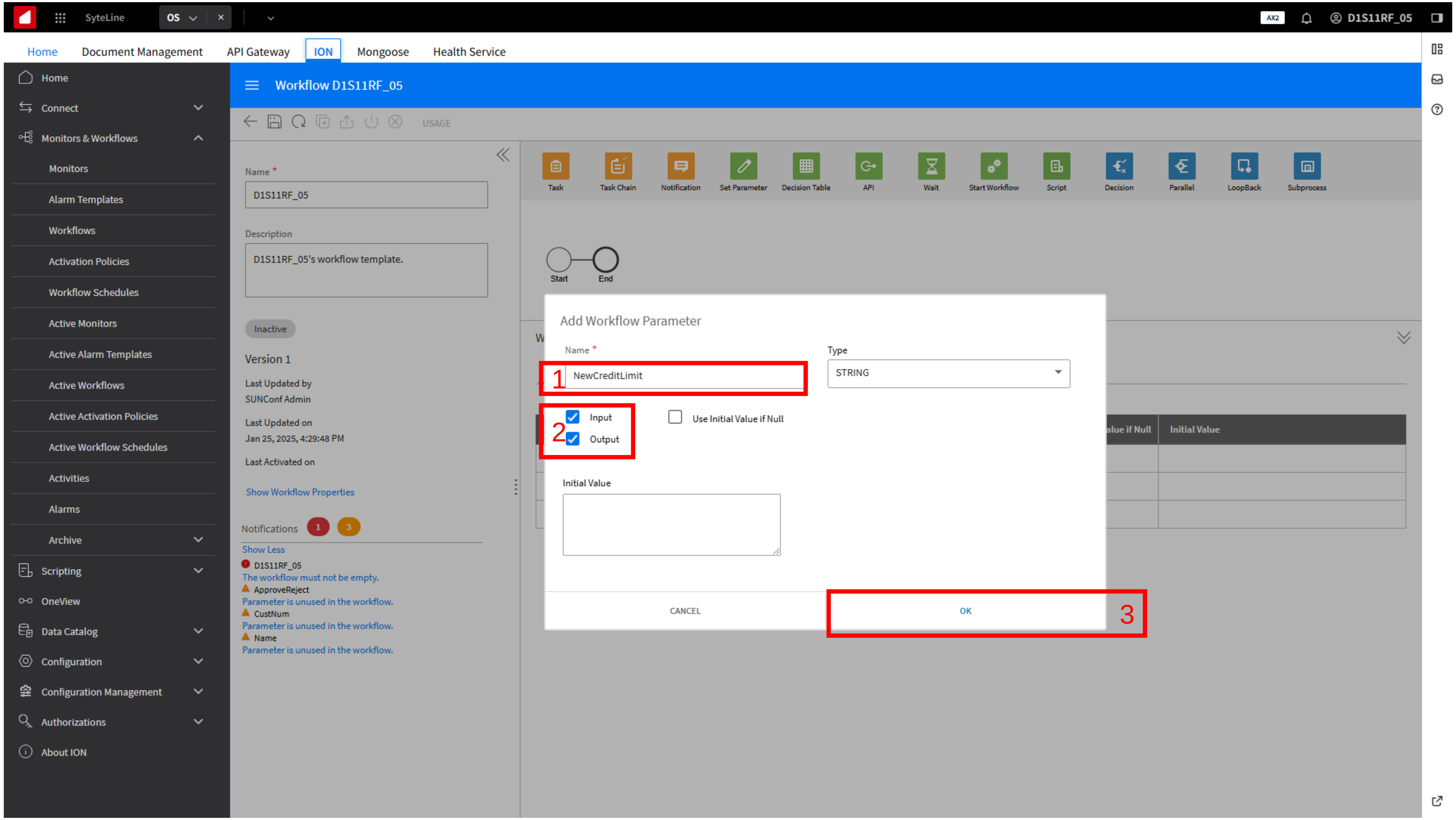


1. **ENTER** ‘Name’ under Name
2. **CHECK** Input
3. **CLICK** OK

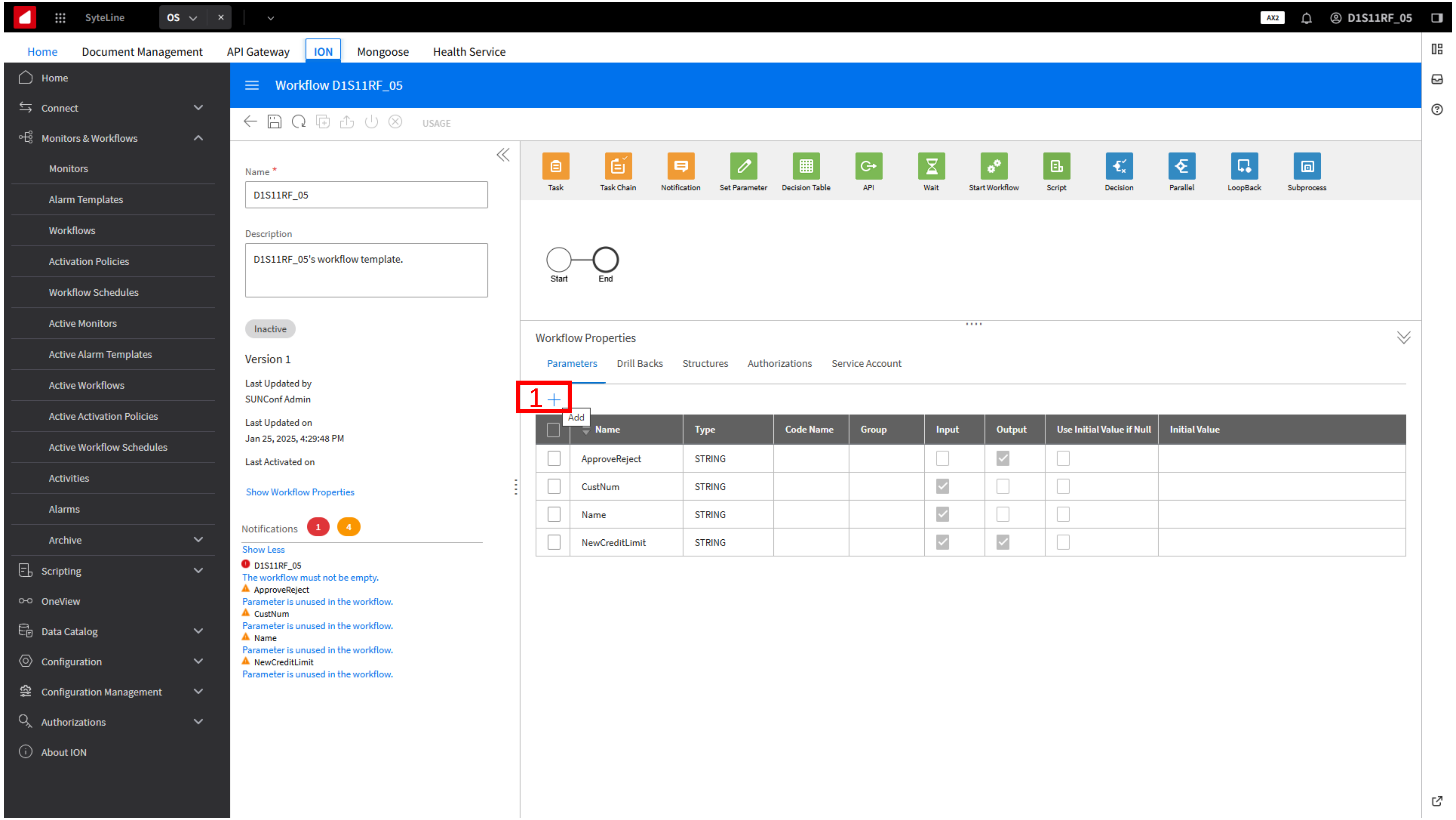
infor



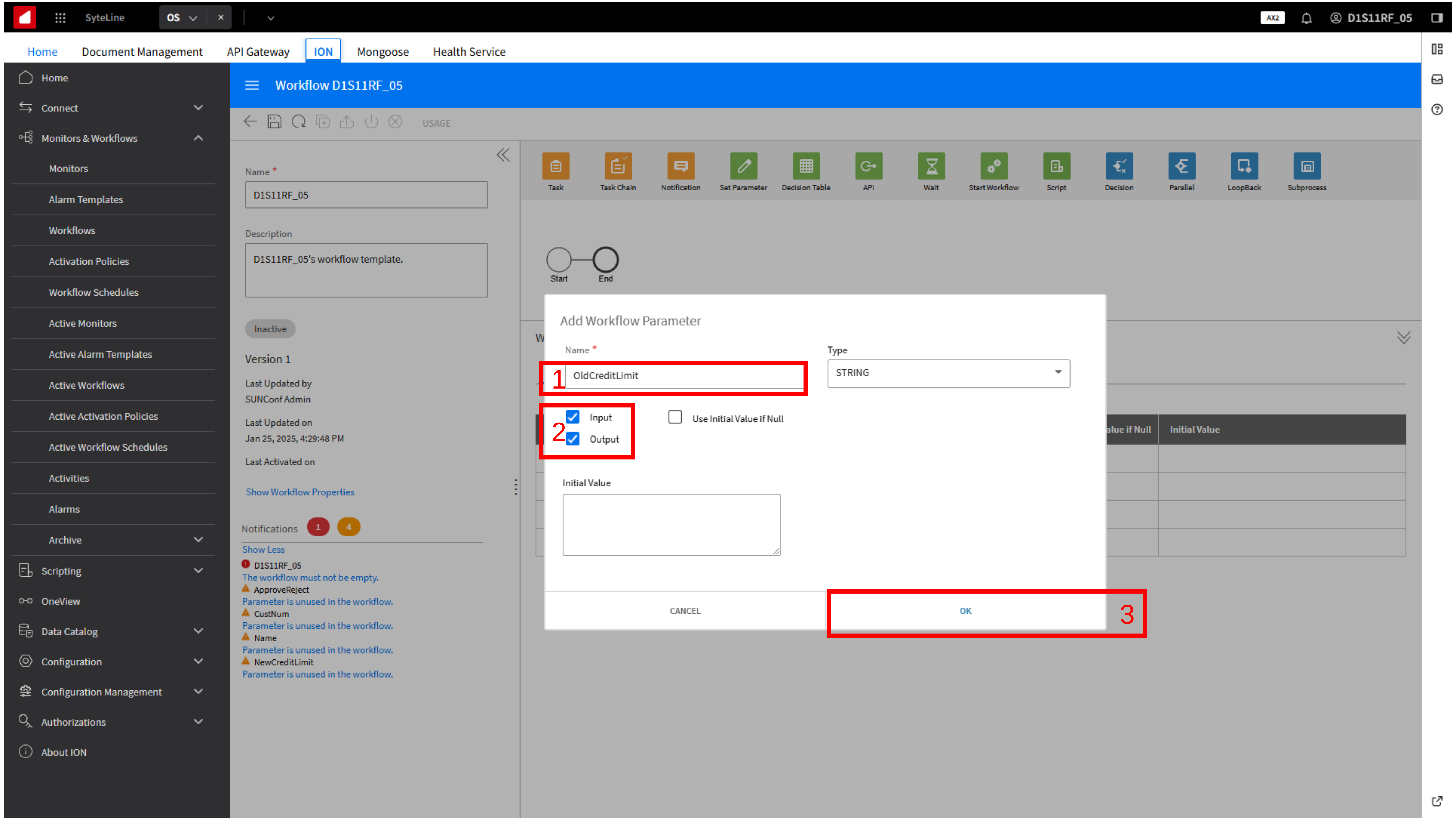
1. **CLICK** the '+' button under Parameters



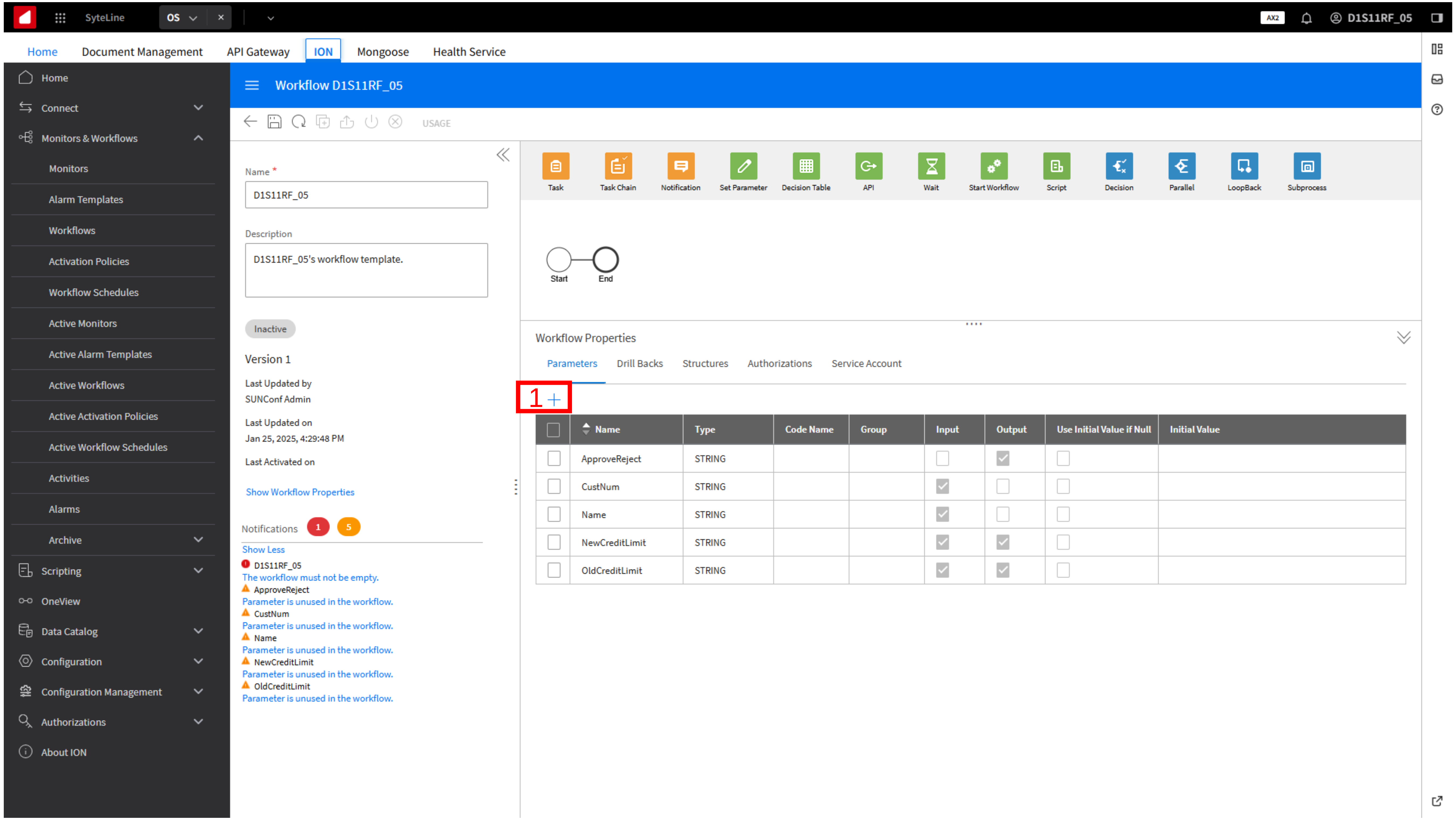
1. **ENTER** ‘NewCreditLimit’ under Name
2. **CHECK** Input and Output
3. **CLICK** OK



1. **CLICK** the ‘+’ button under Parameters

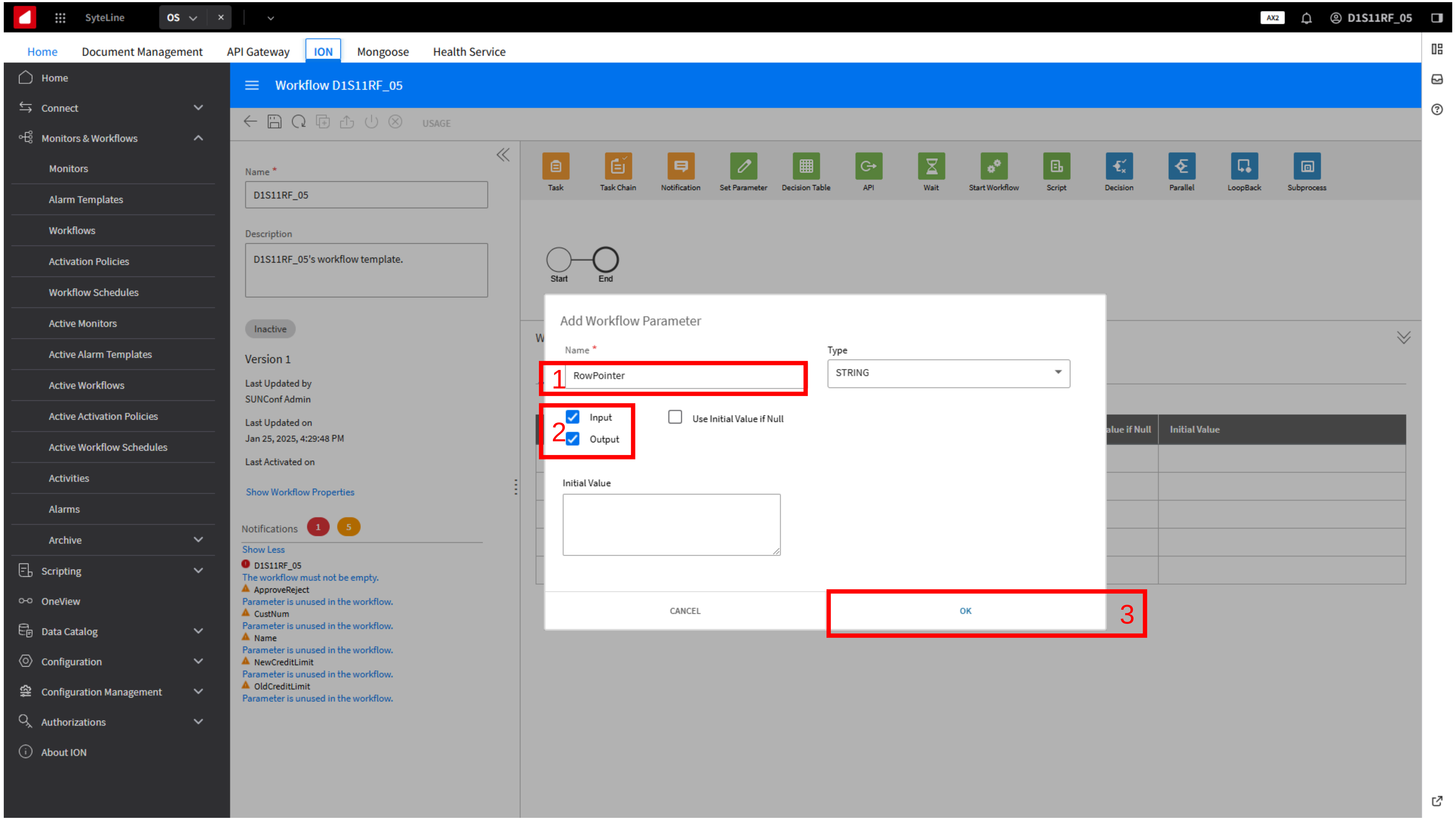


1. **ENTER** ‘OldCreditLimit’ under Name
2. **CHECK** Input and Output
3. **CLICK** OK



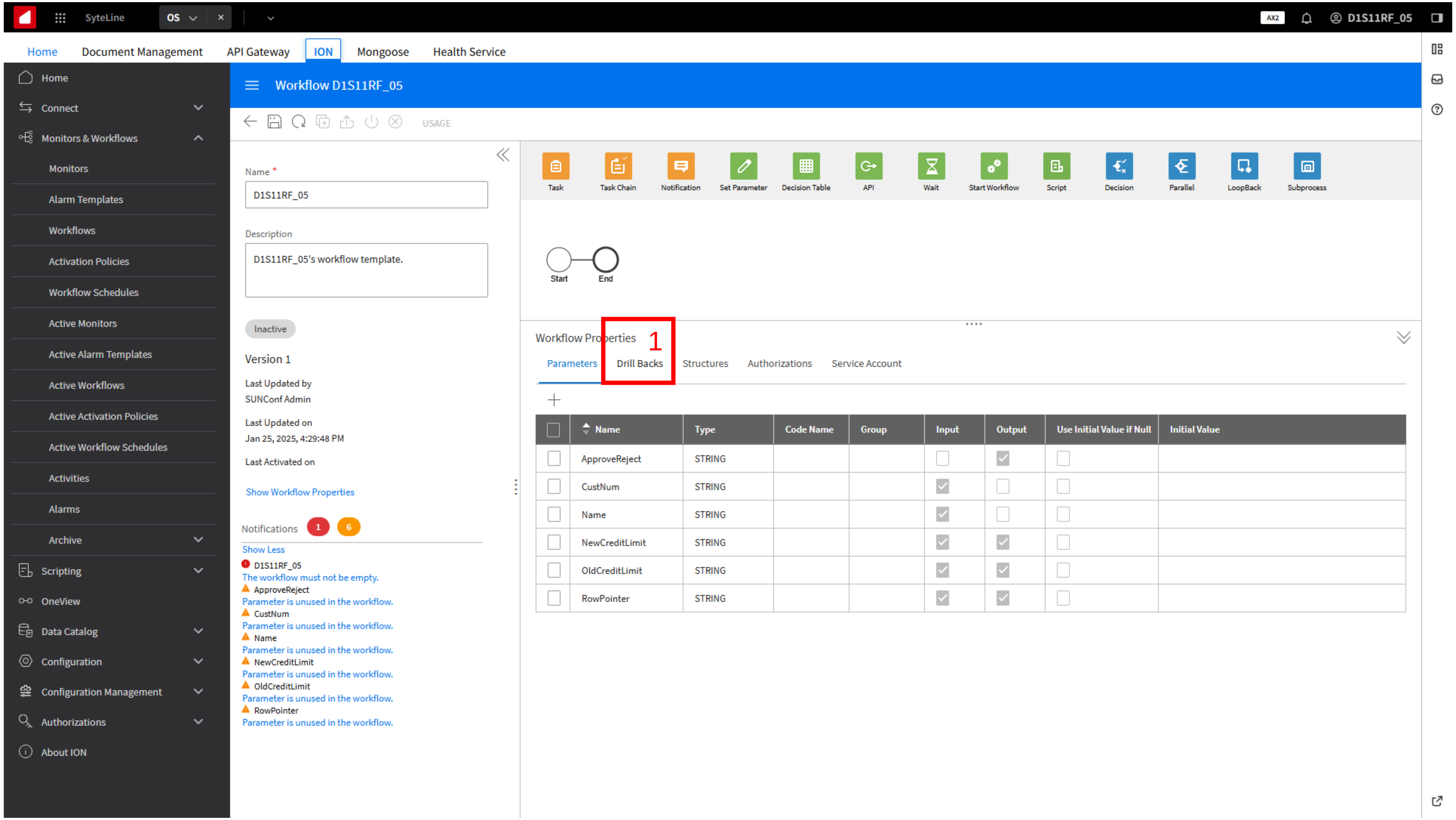
1. **CLICK** the '+' button under Parameters

infor



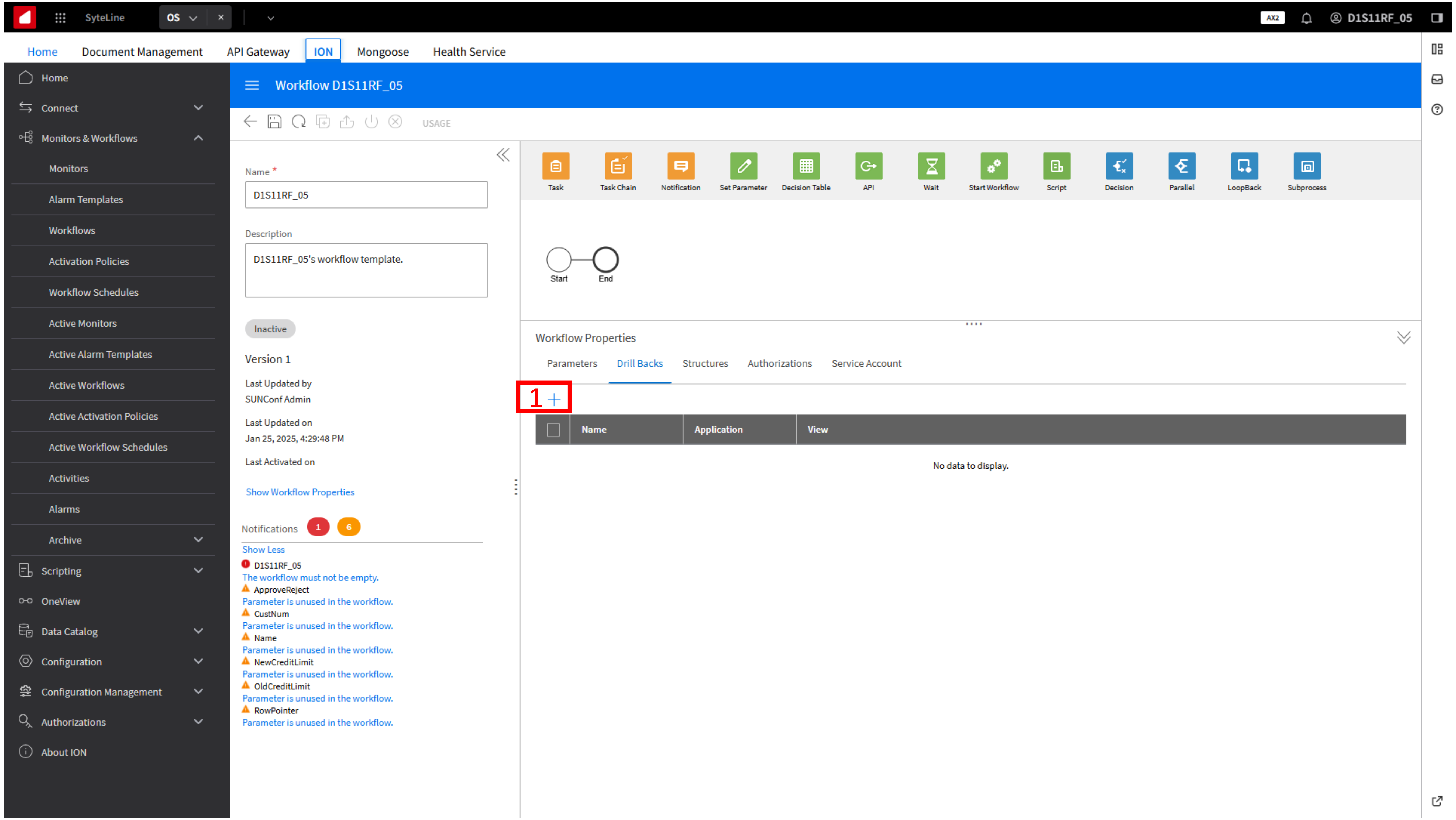
1. **ENTER** 'RowPointer' under Name
2. **CHECK** Input and Output
3. **CLICK** OK

27



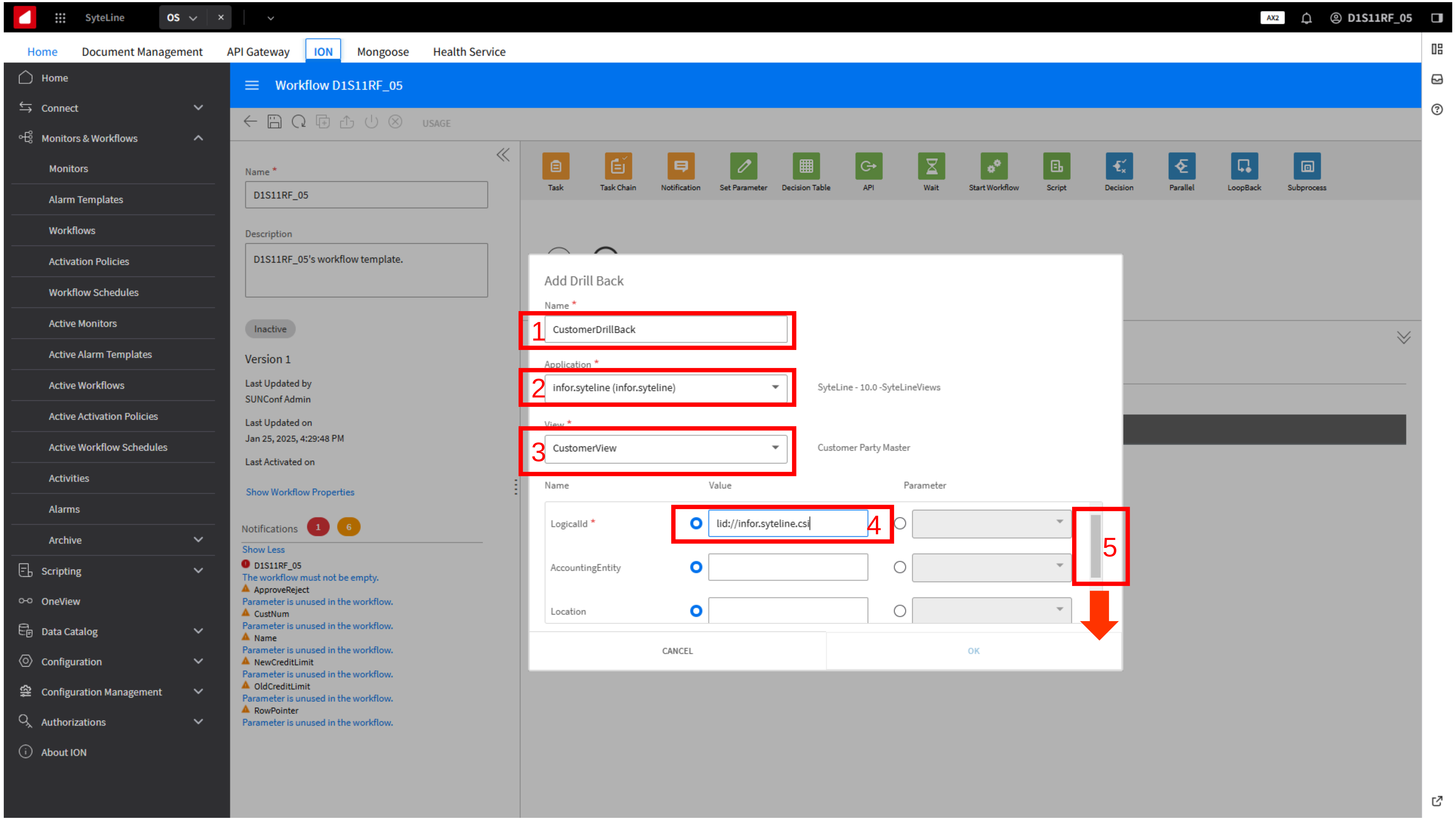
1. **CLICK** Drill Backs

infor

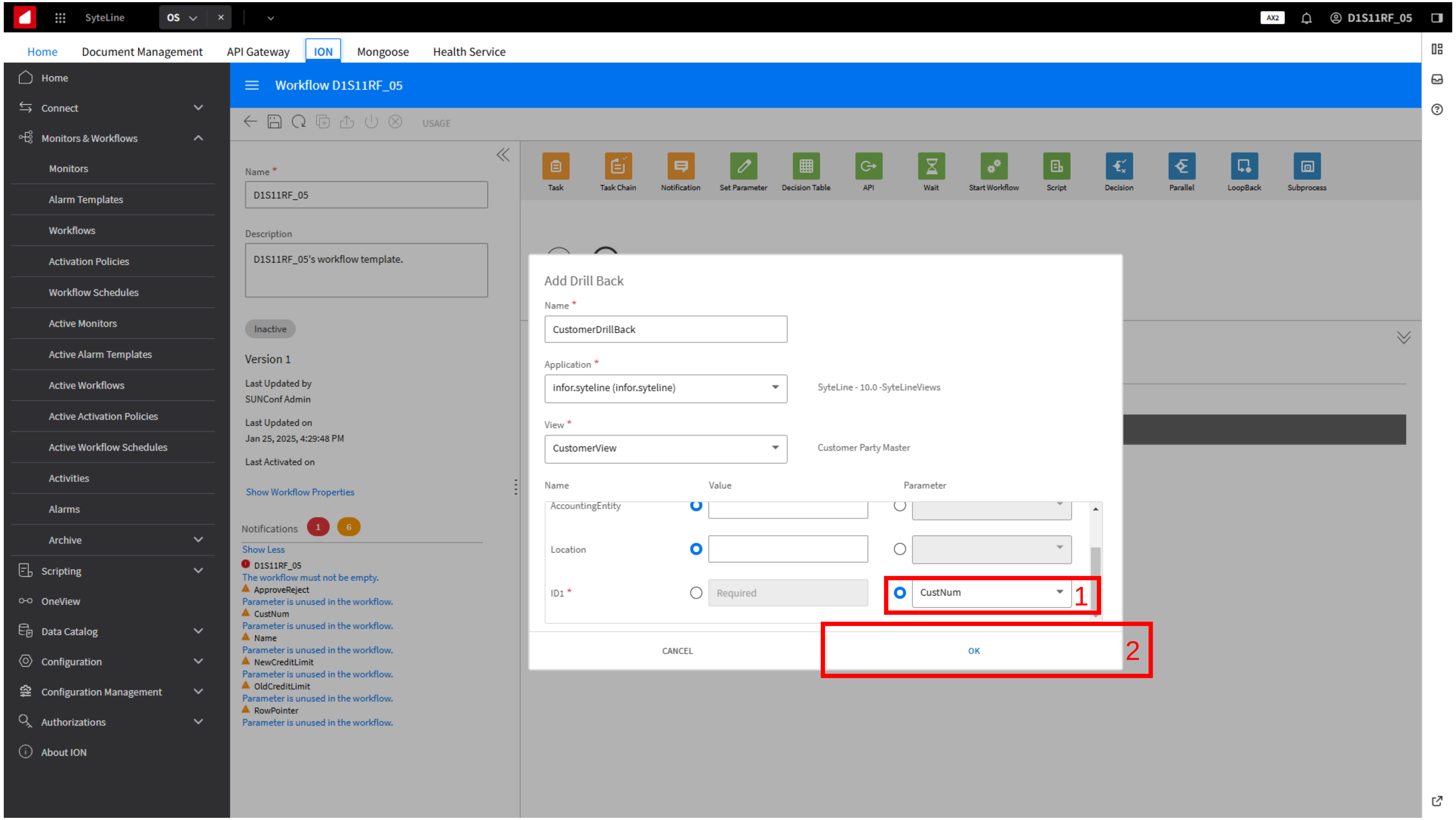


1. **CLICK** the '+' button under Parameters

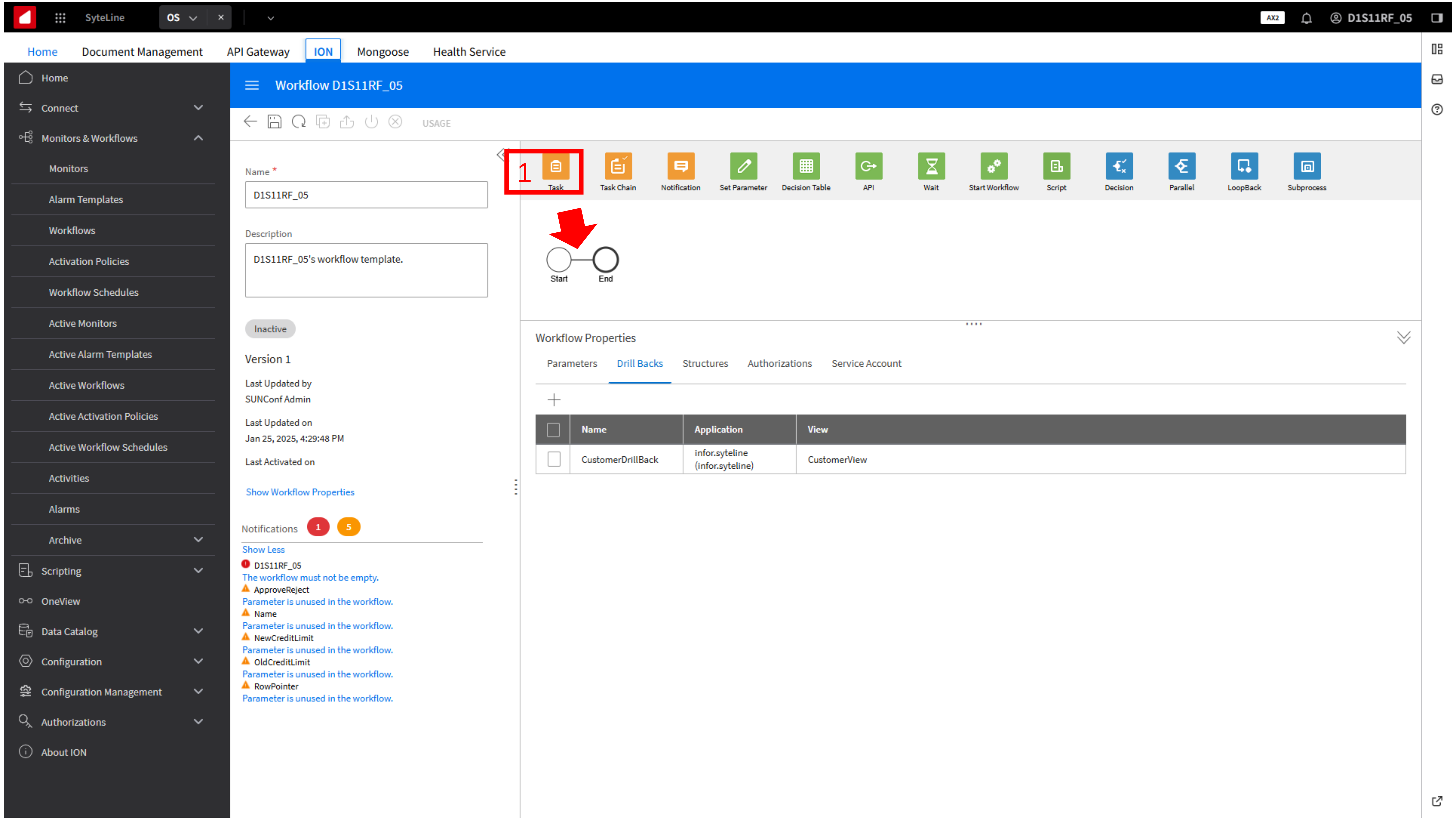
infor



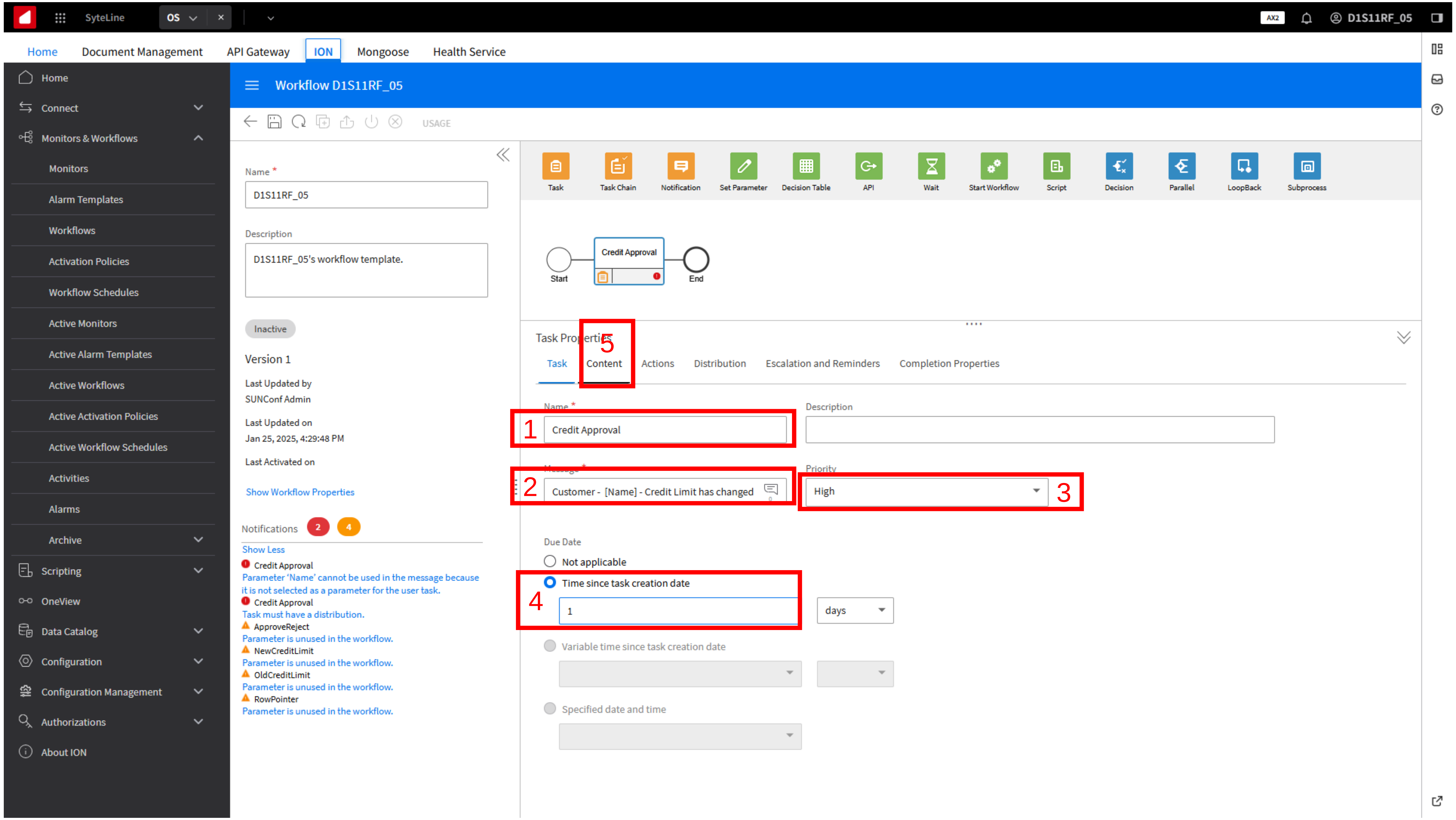
1. **ENTER** ‘CustomerDrillBack’ under Name
2. **SELECT** *infor.syteline (infor.syteline)* from the dropdown
3. **SELECT** *CustomerView* from the dropdown
4. **ENTER** ‘lid://infor.syteline.csi’ for LogicalID Value
5. **DRAG** bar to the bottom of the list



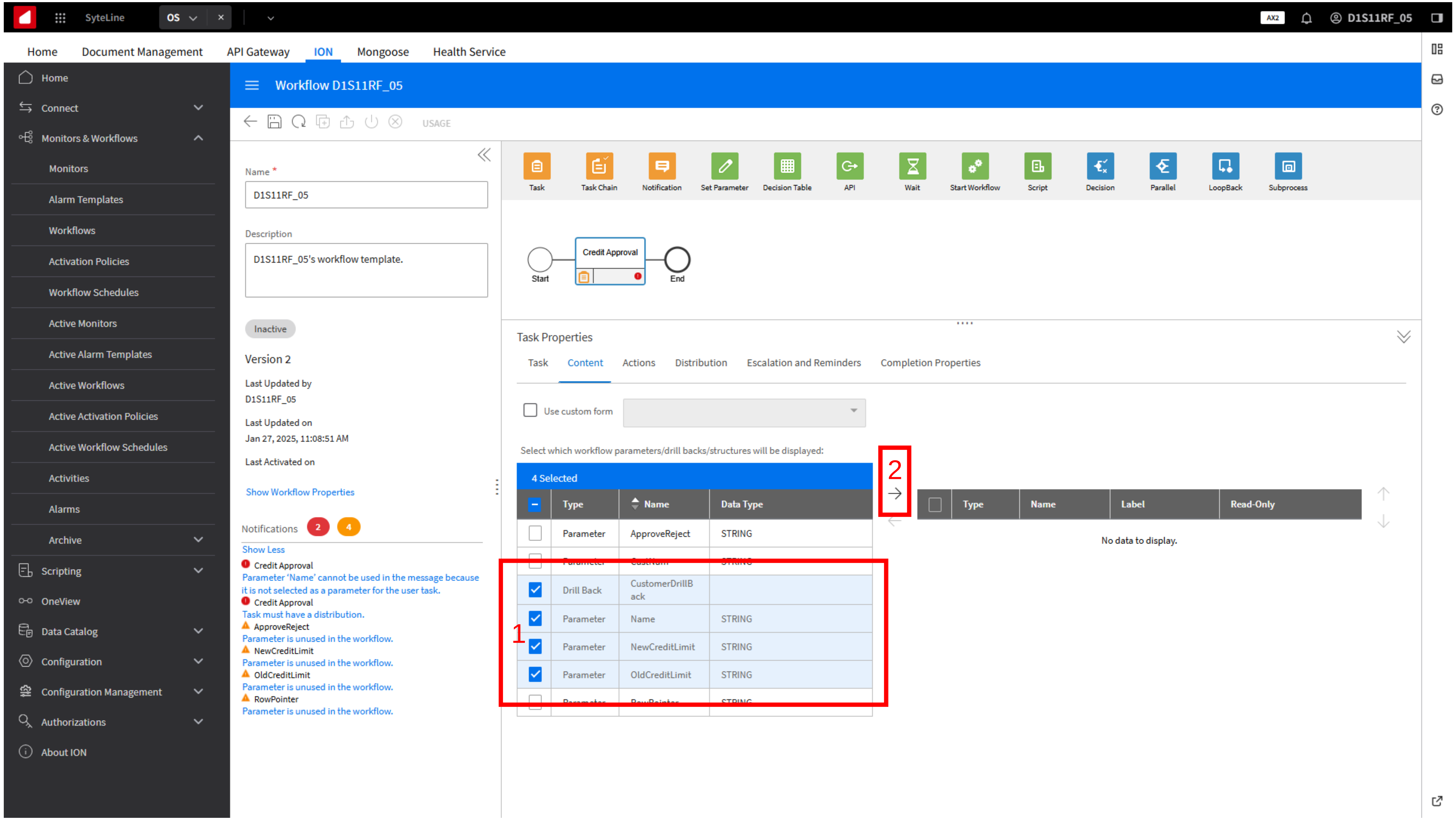
1. **ENABLE** ID1 Parameter radio button and **SELECT** '*CustNum*' from dropdown
2. **CLICK** OK



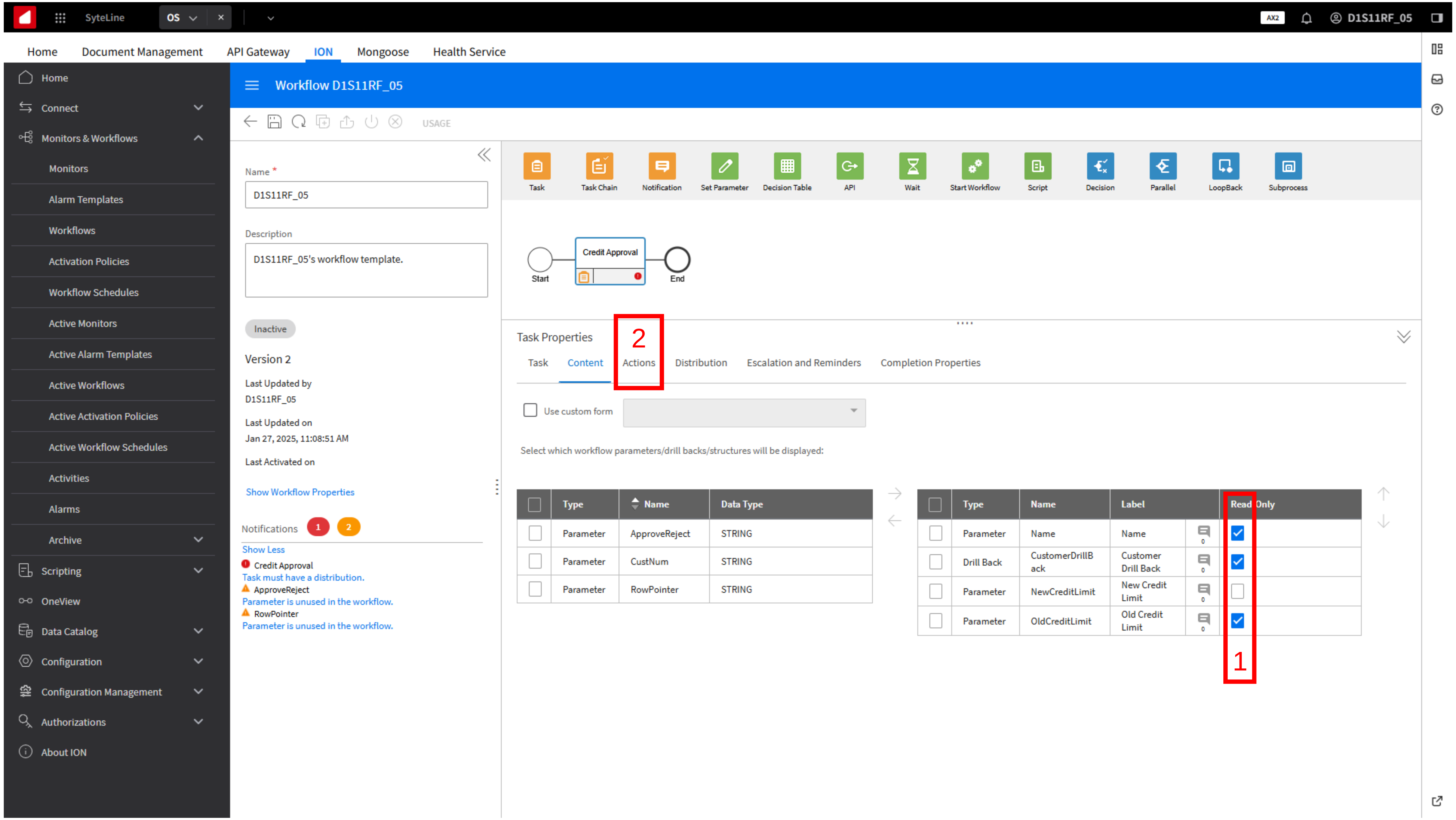
1. **CLICK** and **DRAG** the Task icon on to the timeline



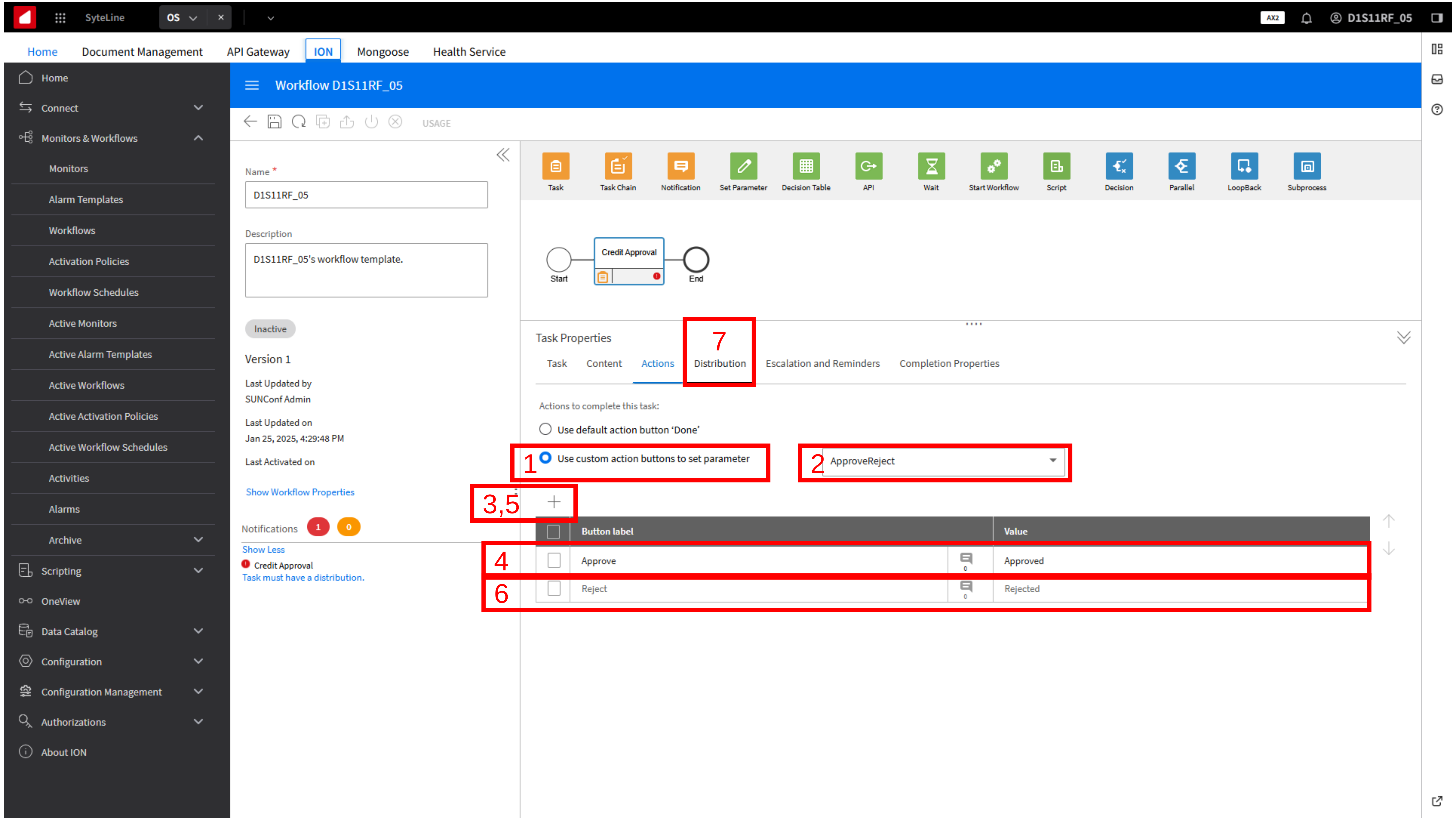
1. **ENTER** 'Credit Approval' under Name
2. **COPY** 'Customer - [Name] - Credit Limit has changed and is requesting approval.' and **PASTE** under Message (don't include quotes)
3. **SELECT** *High* from the Priority dropdown field
4. **ENABLE** radio button for Time since task creation date and **ENTER** '1'
5. **CLICK** Content under Task Properties



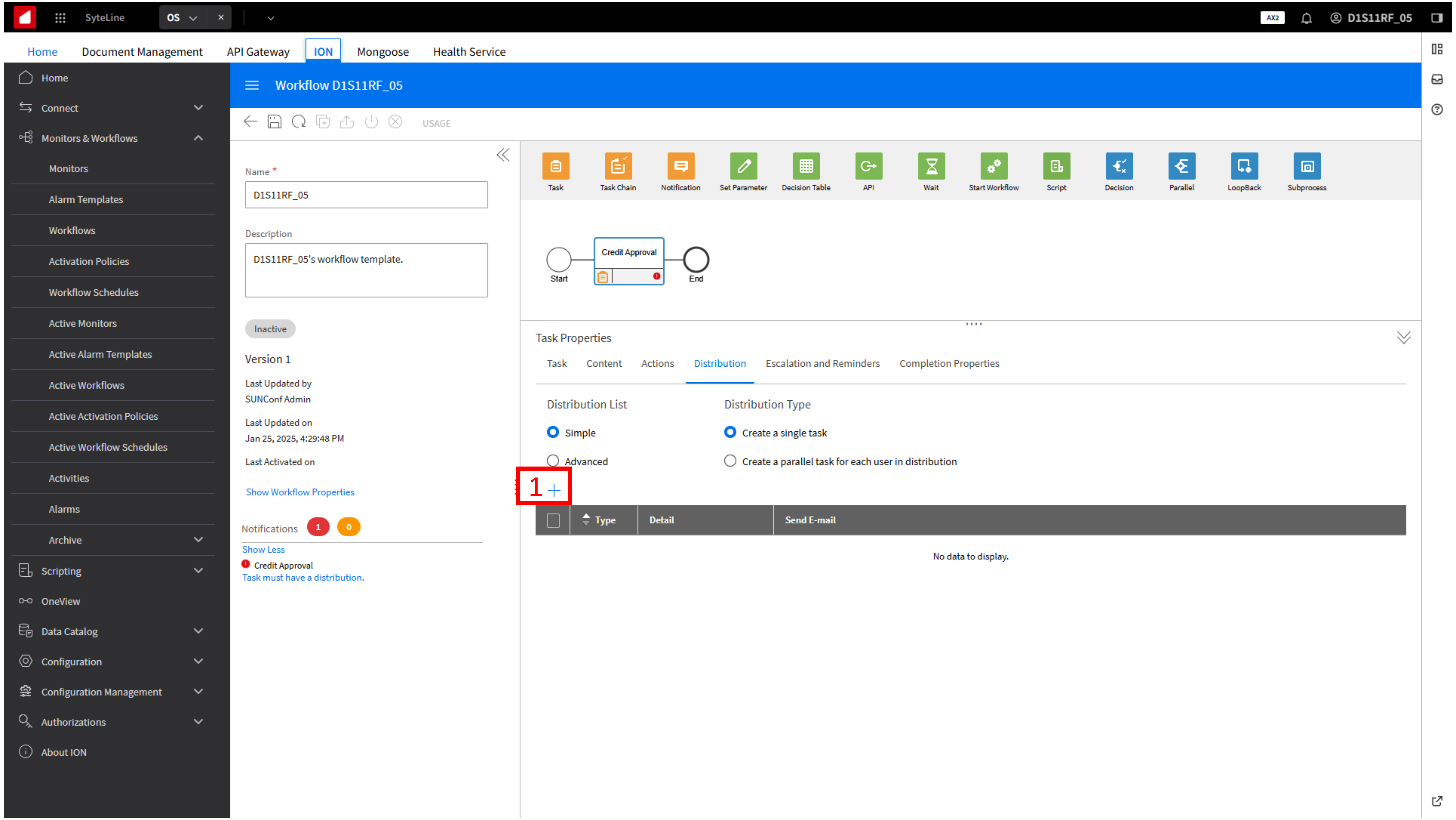
1. **CHECK** the boxes for CustomerDrillBack, Name, NewCreditLimit, OldCreditLimit
2. **CLICK** the '->' to add the parameters to the table to be displayed



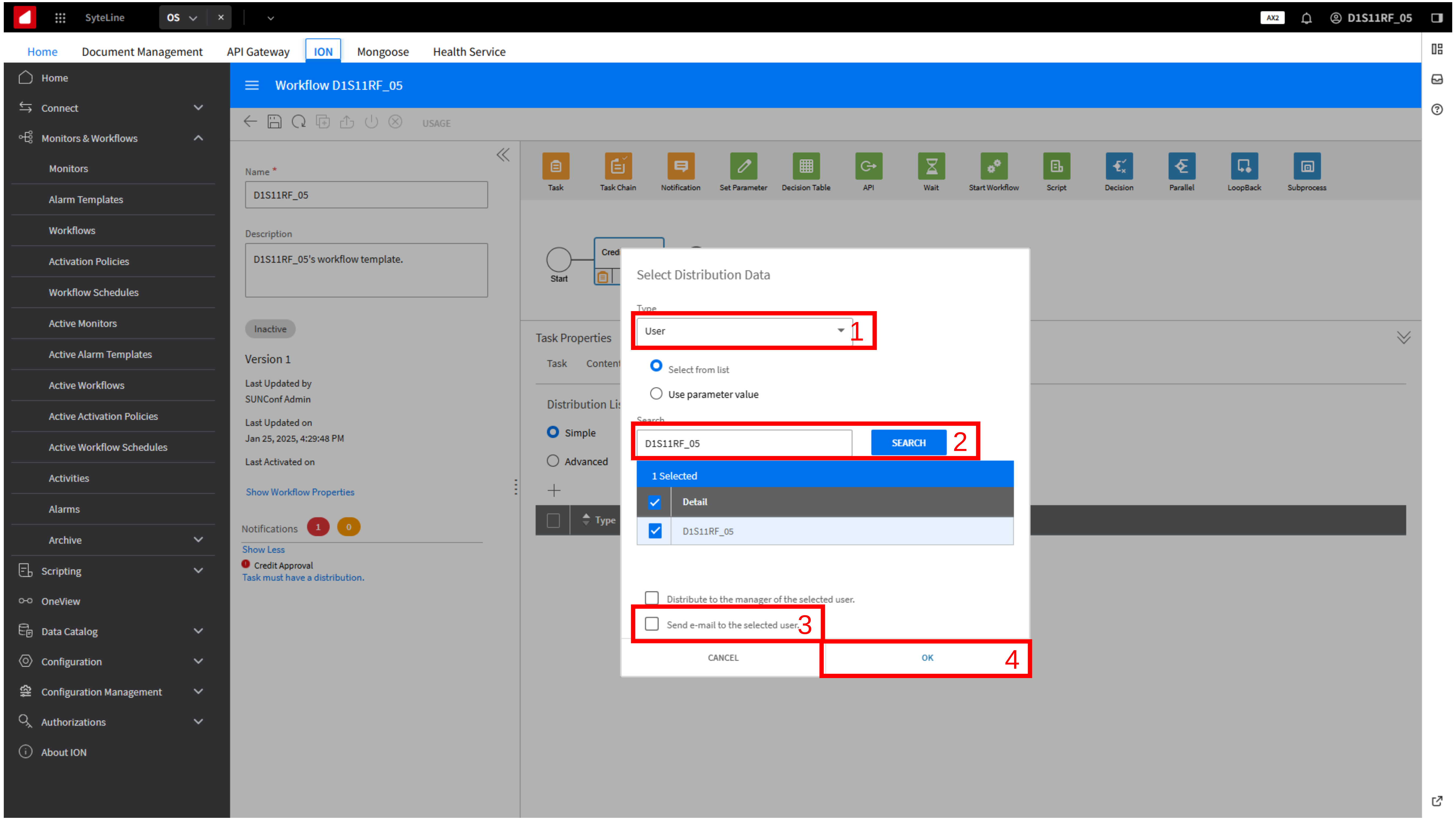
1. **CHECK** Read-Only for Name, CustomerDrillBack and OldCreditLimit
2. **CLICK** Actions under Task Properties



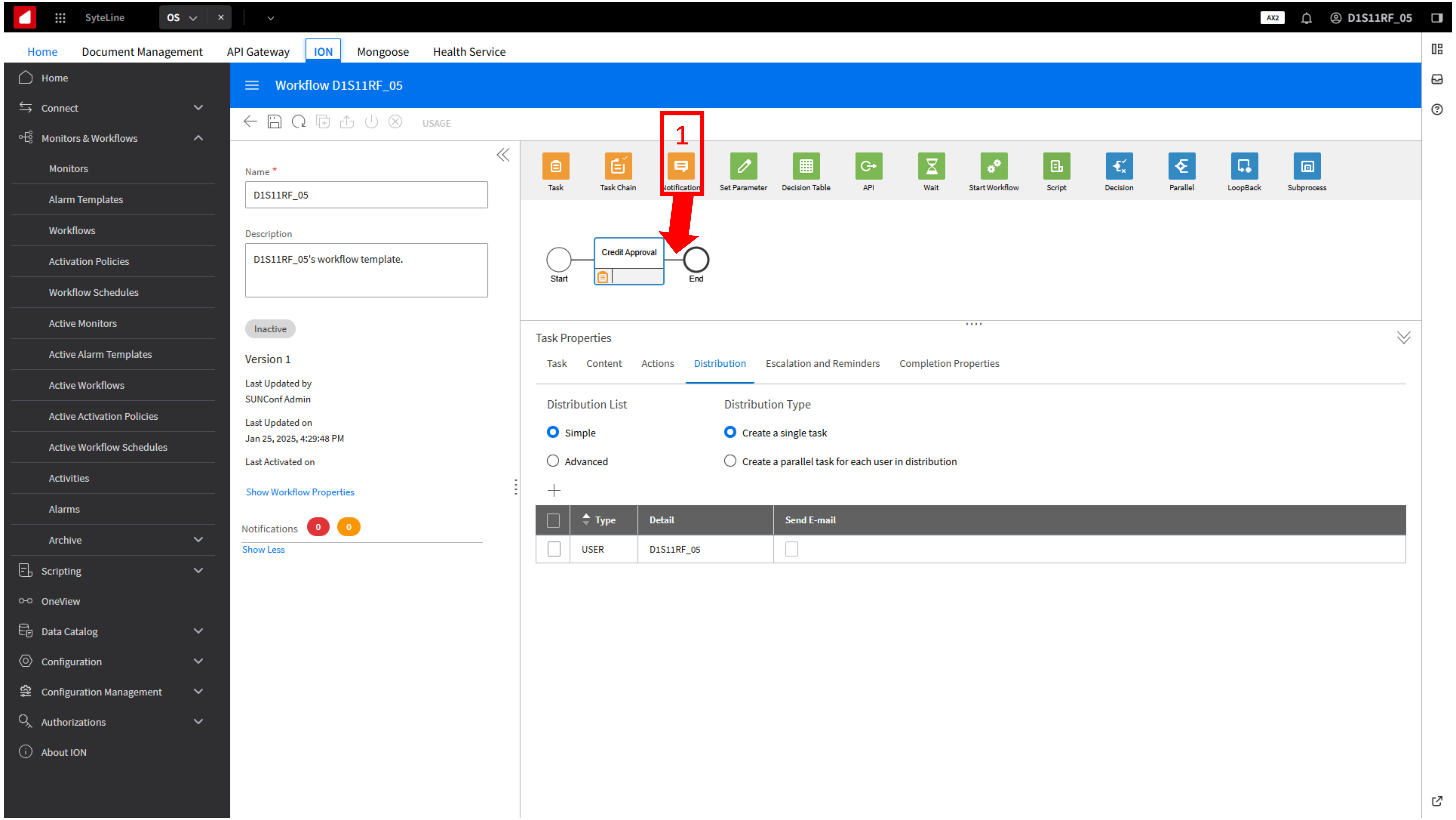
1. **ENABLE** "Use custom action buttons to set parameter" radio button
2. **SELECT** ApproveReject from dropdown
3. **CLICK** '+' to add a button label
4. **ENTER** 'Approve' under Button Label and 'Approved' for Value
5. **CLICK** '+' to add a button label
6. **ENTER** 'Reject' under Button Label and 'Rejected' for Value
7. **CLICK** Distribution under Task Properties



1. **CLICK** '+' to add a distribution list

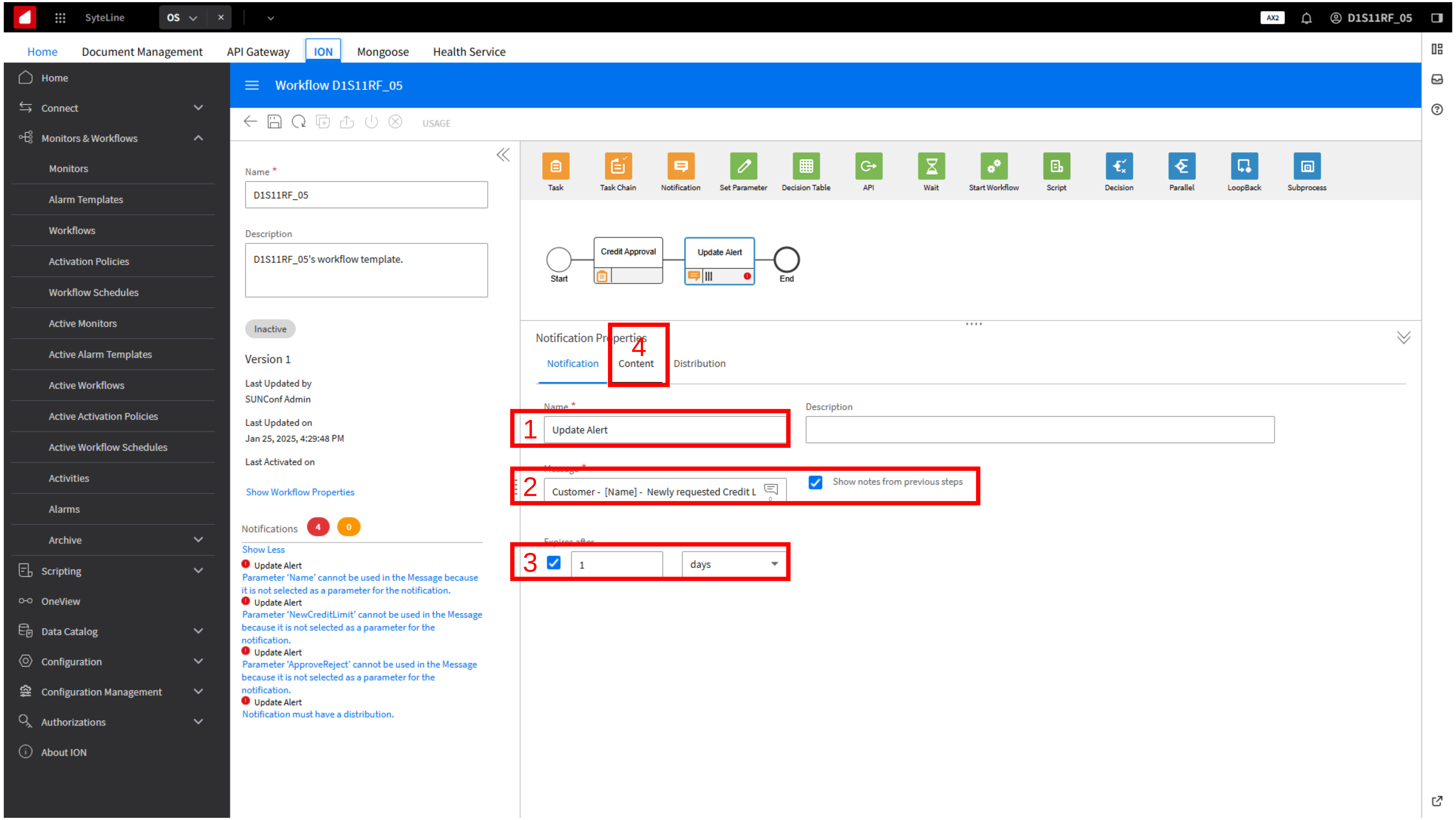


1. **SELECT** User under Type dropdown
2. **ENTER** your username under Search then **CLICK** search to find your user
3. **UNCHECK** Send e-mail to the selected user
4. **CLICK** OK



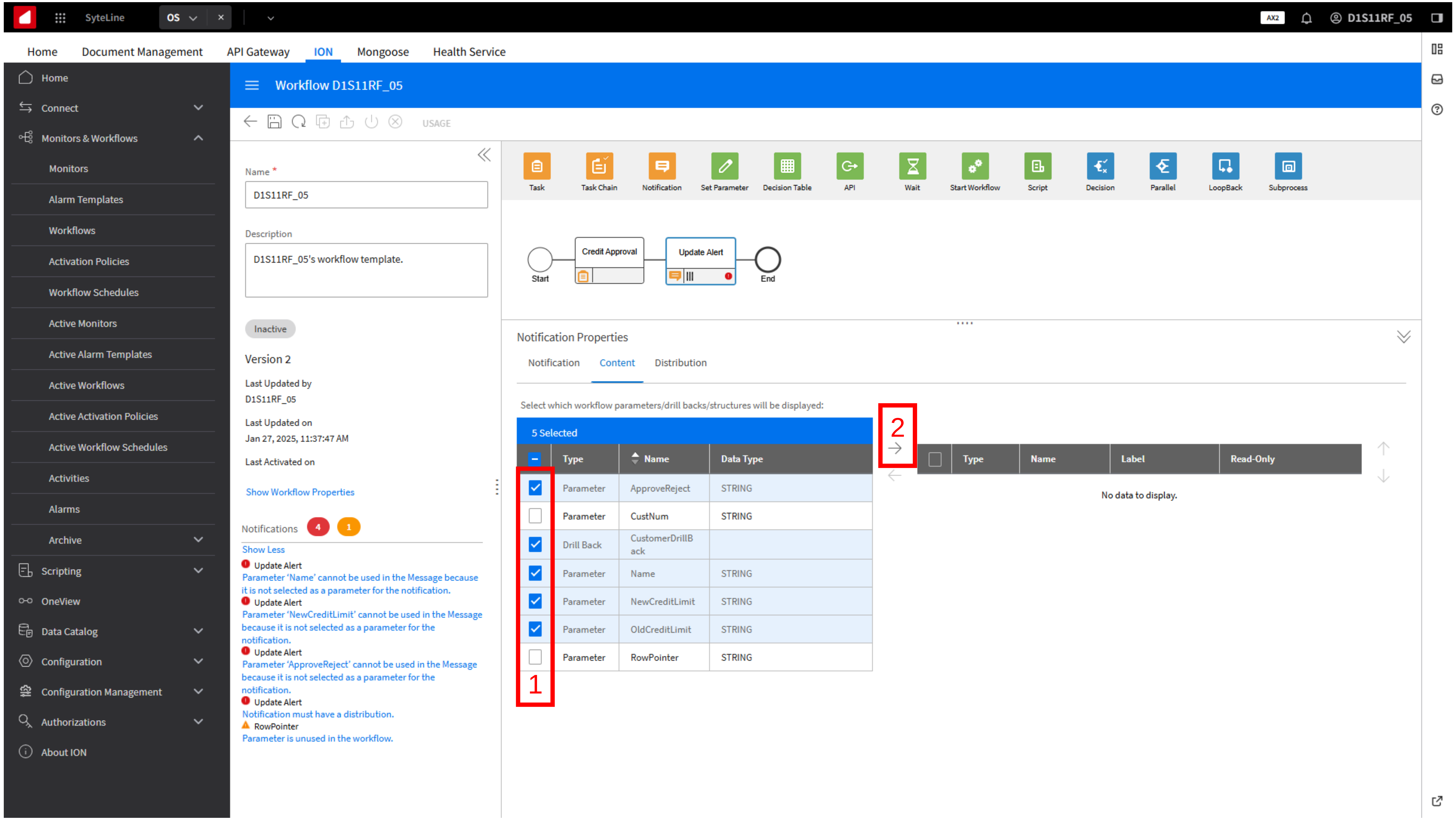
1. **CLICK** and **DRAG** the Notification icon on to the timeline

infor

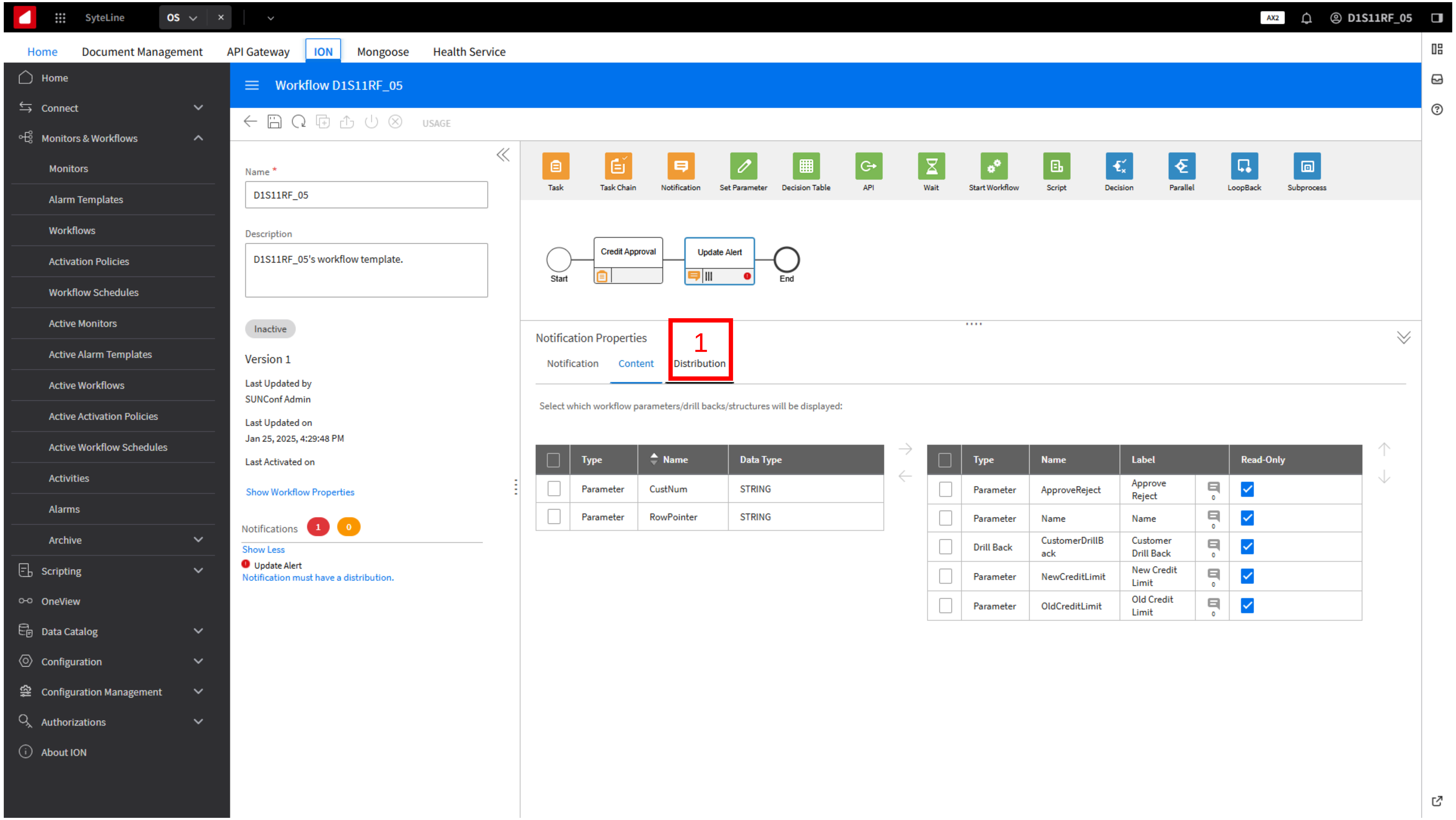


1. **ENTER** 'Update Alert' under Name
2. **COPY** 'Customer - [Name] - Newly requested Credit Limit of [NewCreditLimit] has been [ApproveReject].'
   PASTE under Message (don't include quotes)
   CHECK Show notes from previous steps
3. **CHECK** Expires after 1 day
4. **CHECK** <u>Content</u> under Notification Properties

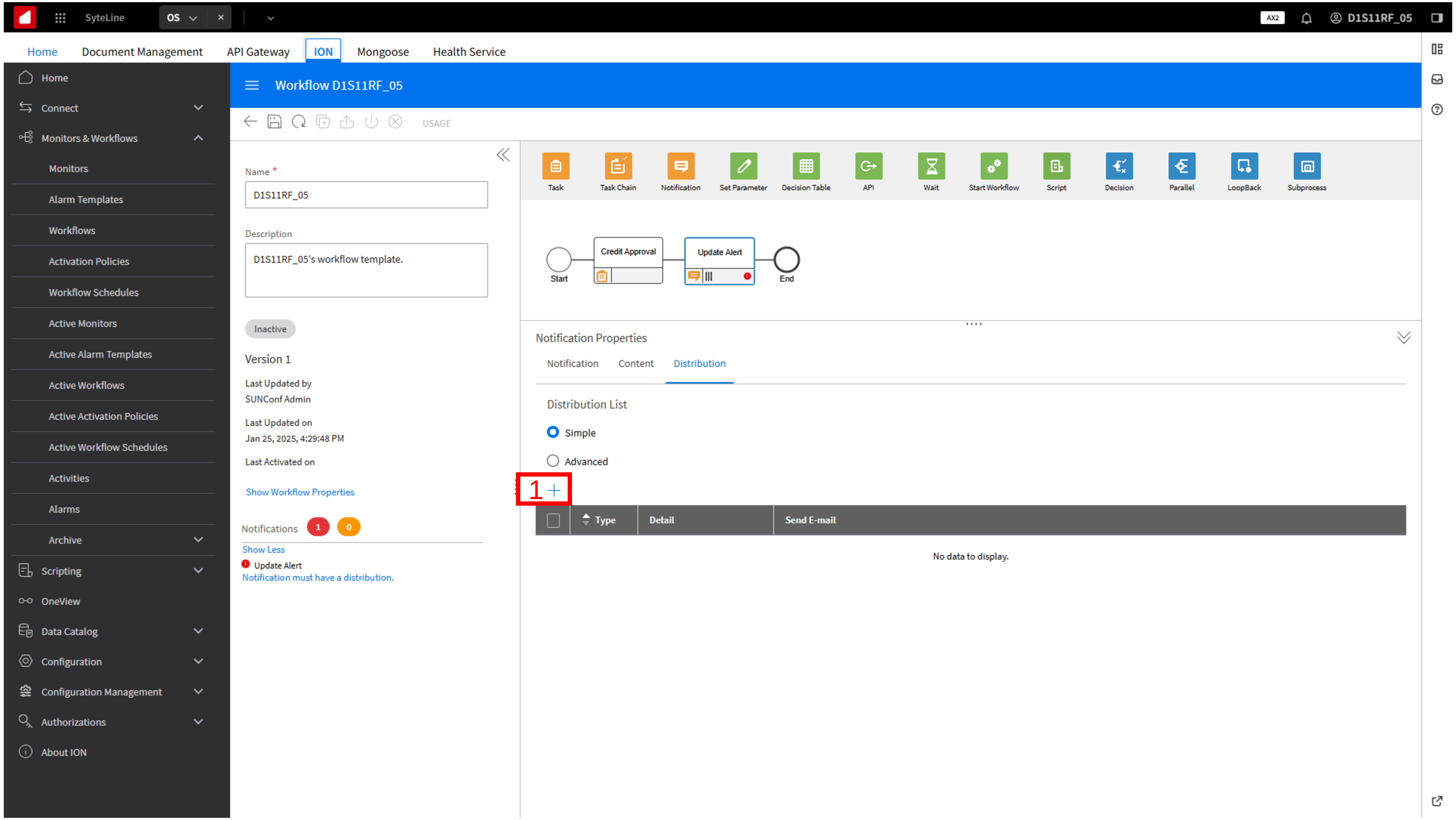
infor



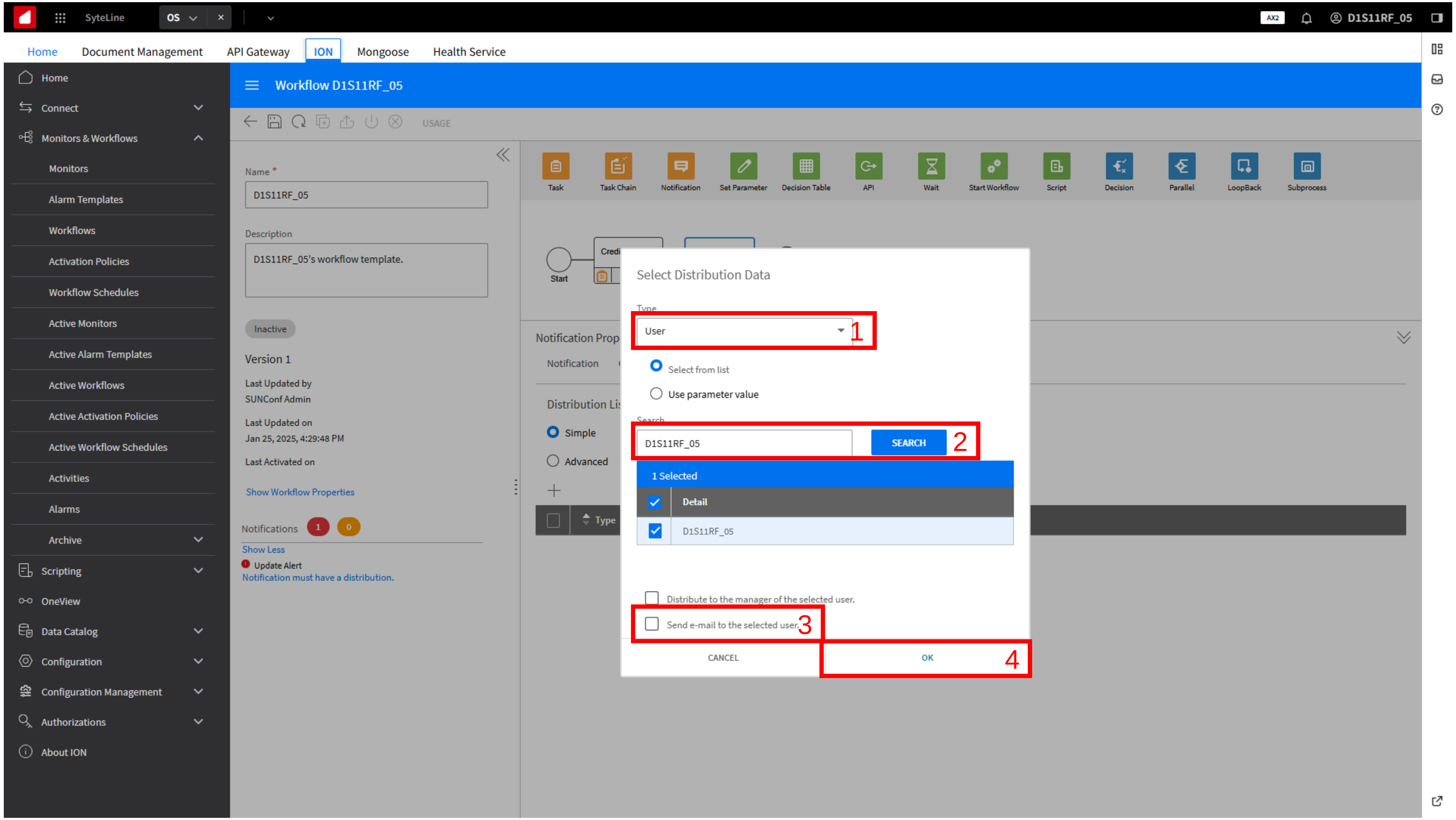
1. **CHECK** the boxes for ApproveReject, CustomerDrillBack, Name, NewCreditLimit, OldCreditLimit
2. **CLICK** the '->' to add the parameters to the table to be displayed



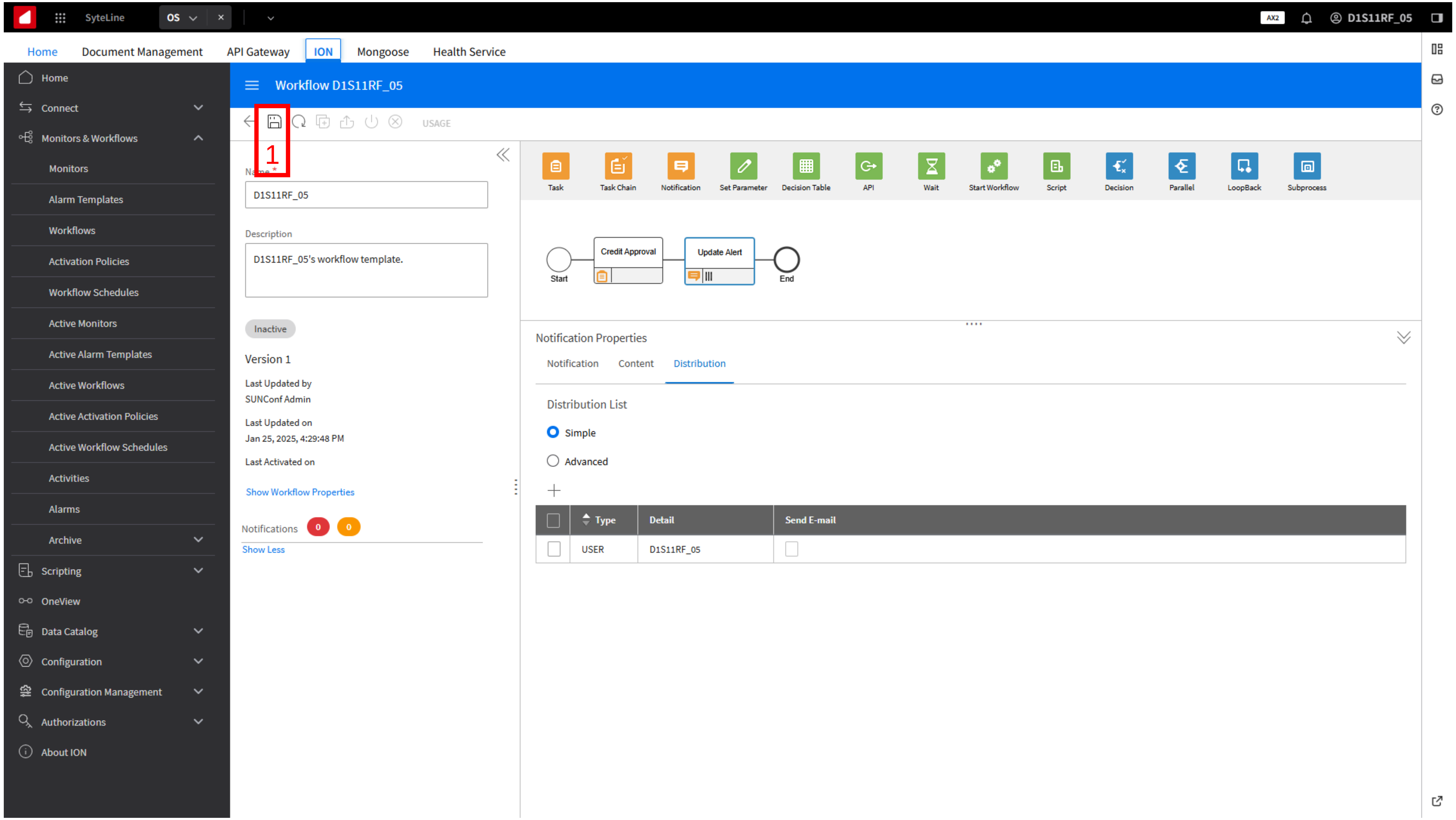
1. **CLICK** Distribution under Notification Properties



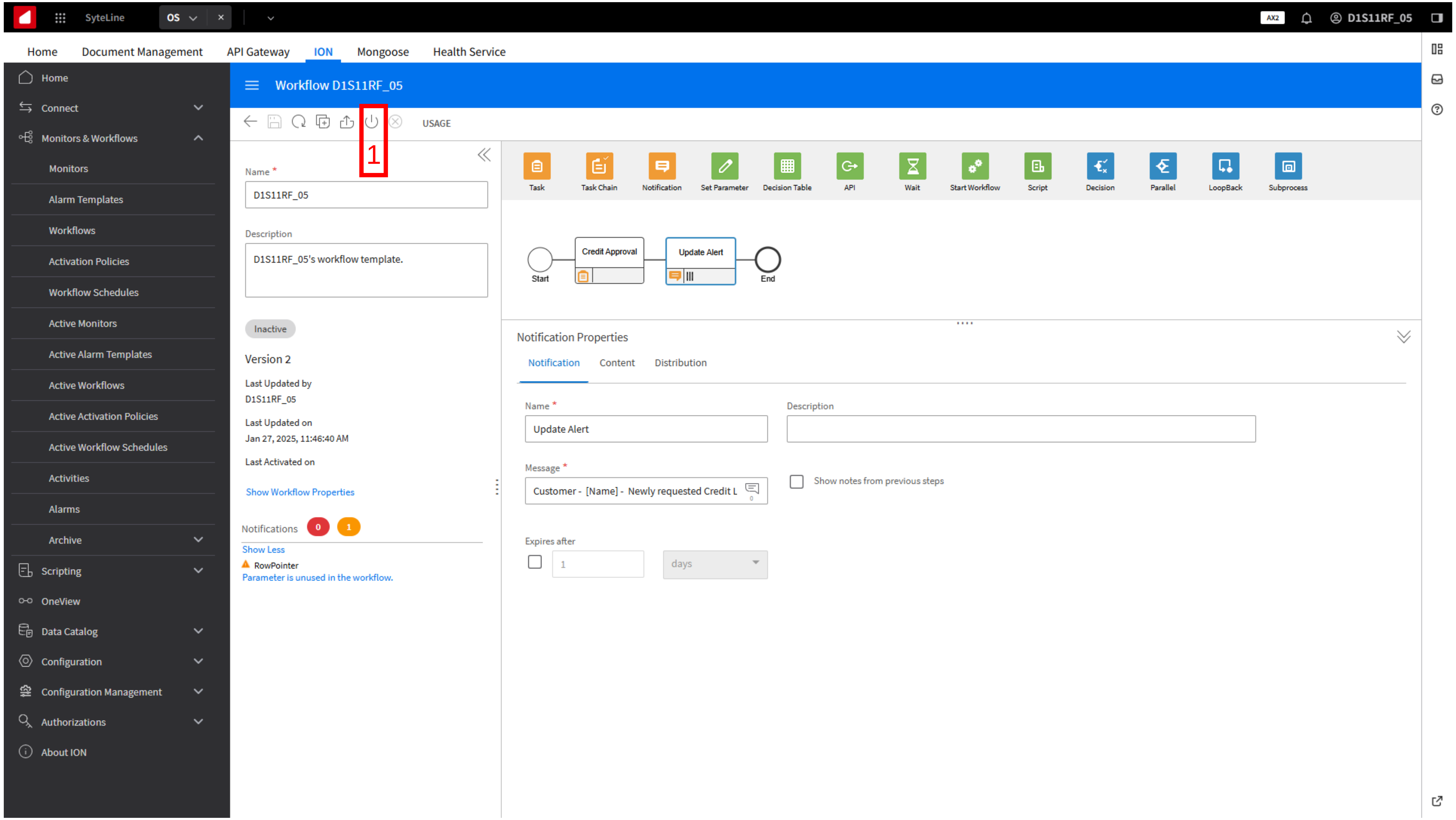
1. **CLICK** '+' to add a distribution list



1. **SELECT** User under Type dropdown
2. **ENTER** your username under Search then **CLICK** search to find your user
3. **UNCHECK** Send e-mail to the selected user
4. **CLICK** OK

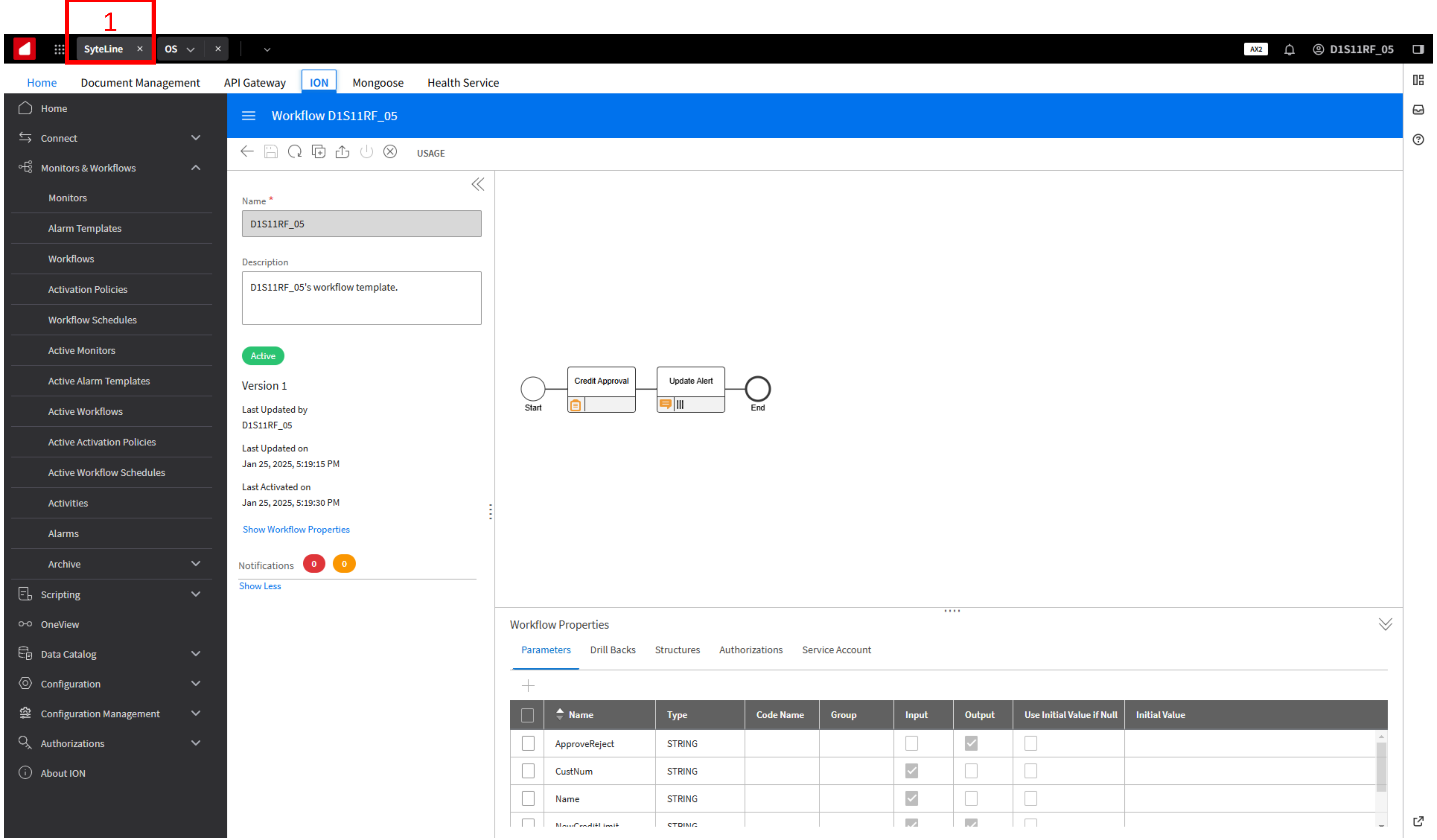


1. **CLICK** the Save icon on the menu bar

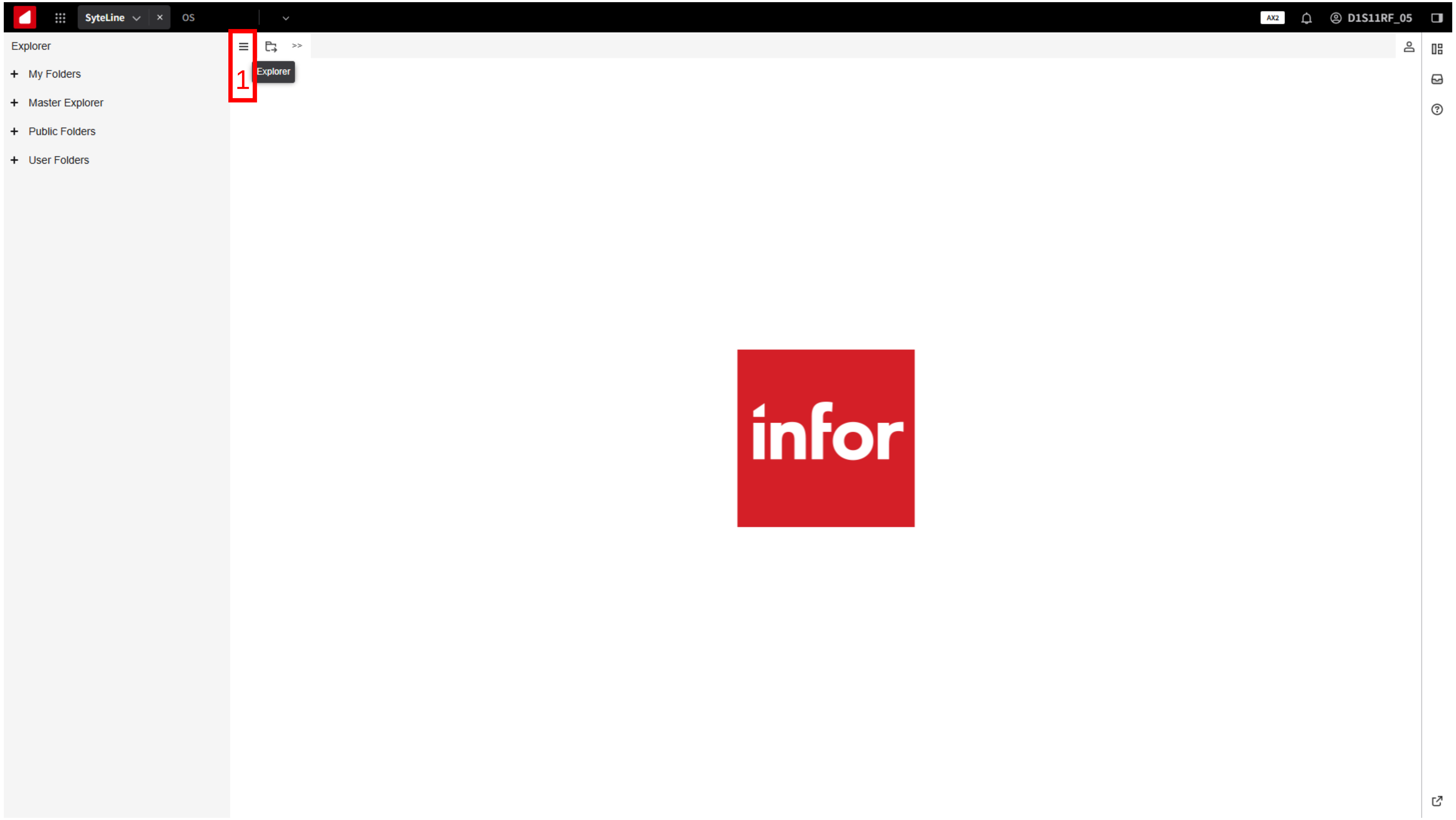


1. **CLICK** the Activate icon from the menu bar

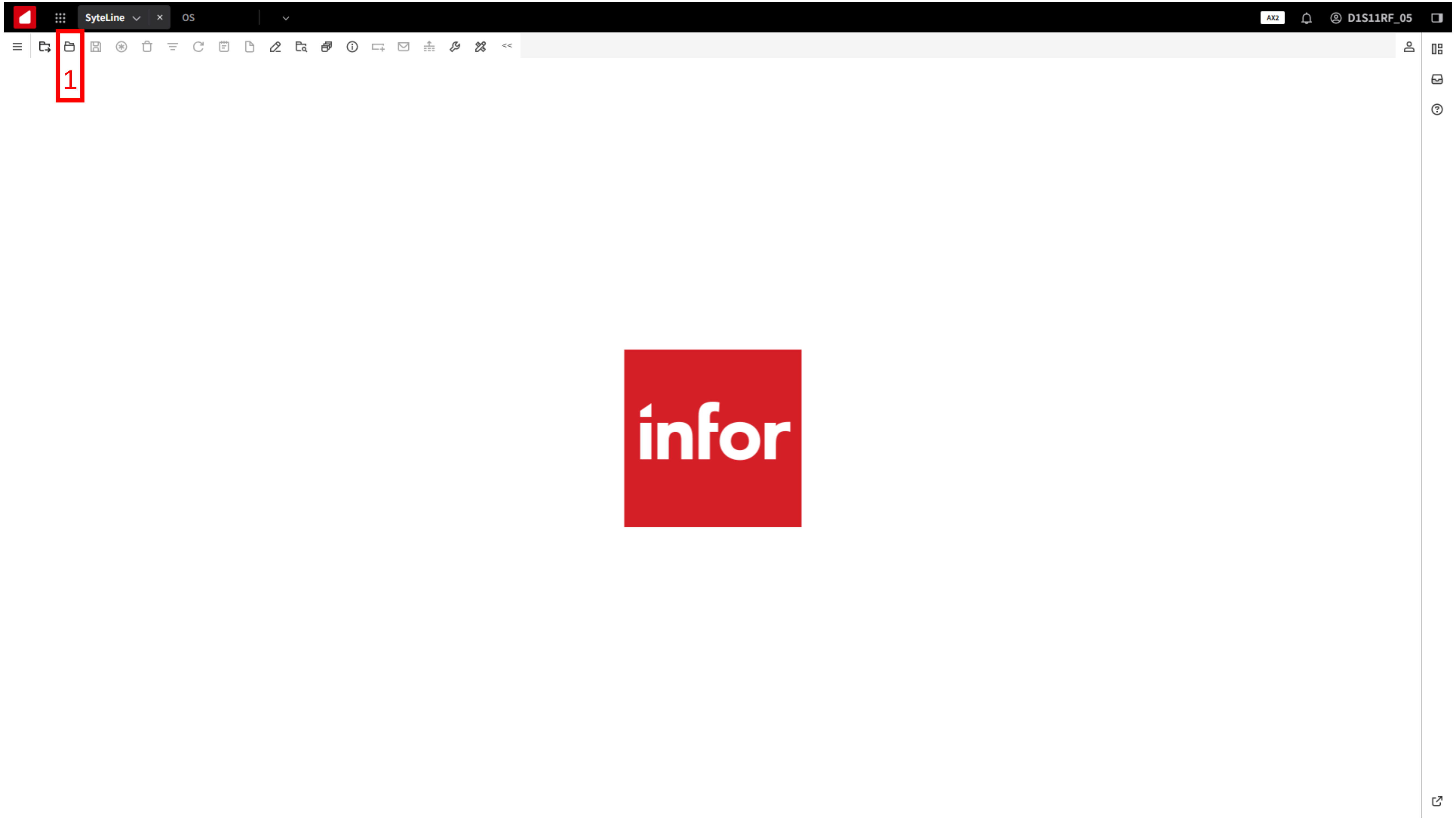
Review



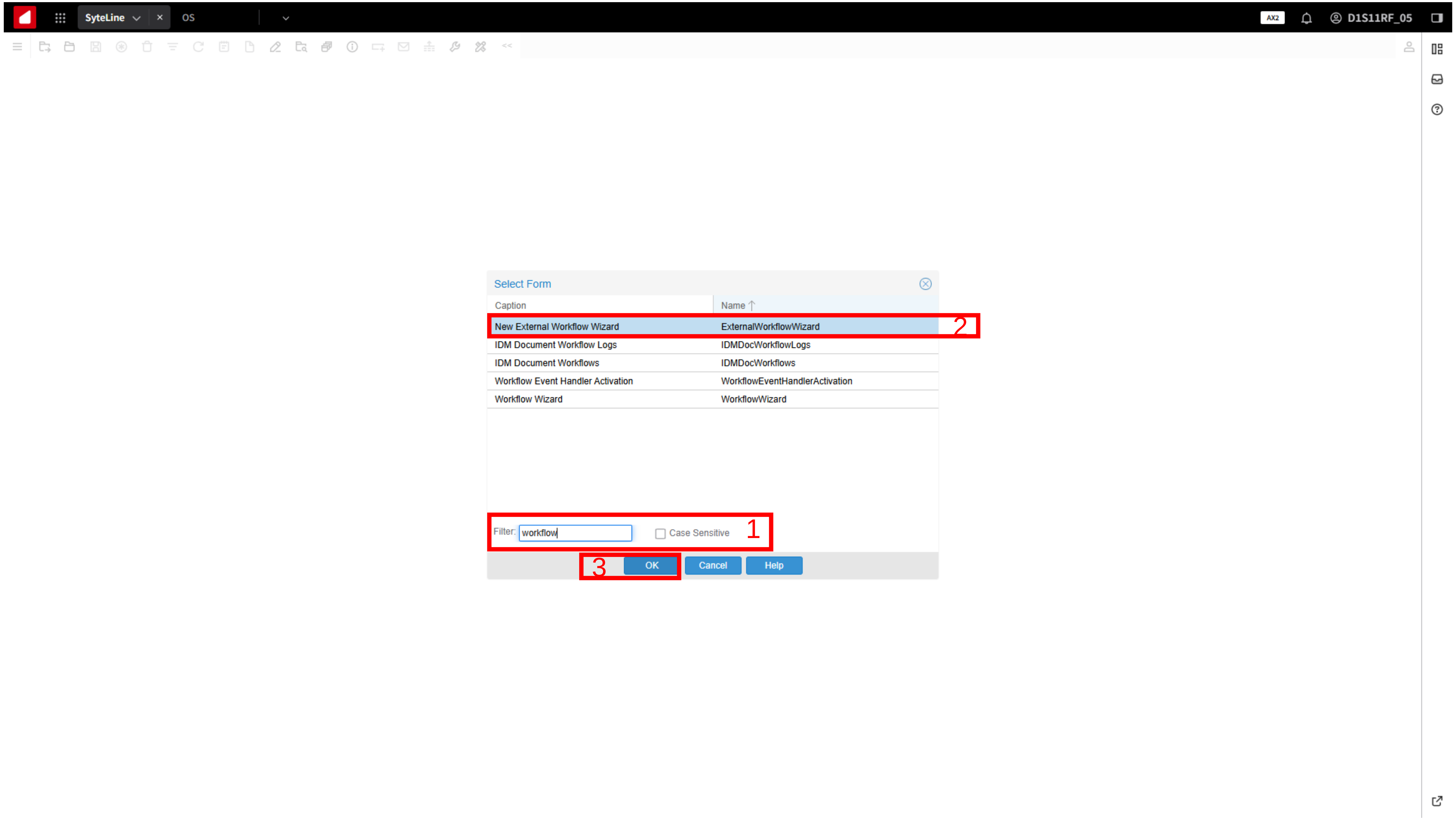
1. **CLICK** SyteLine on the black bar



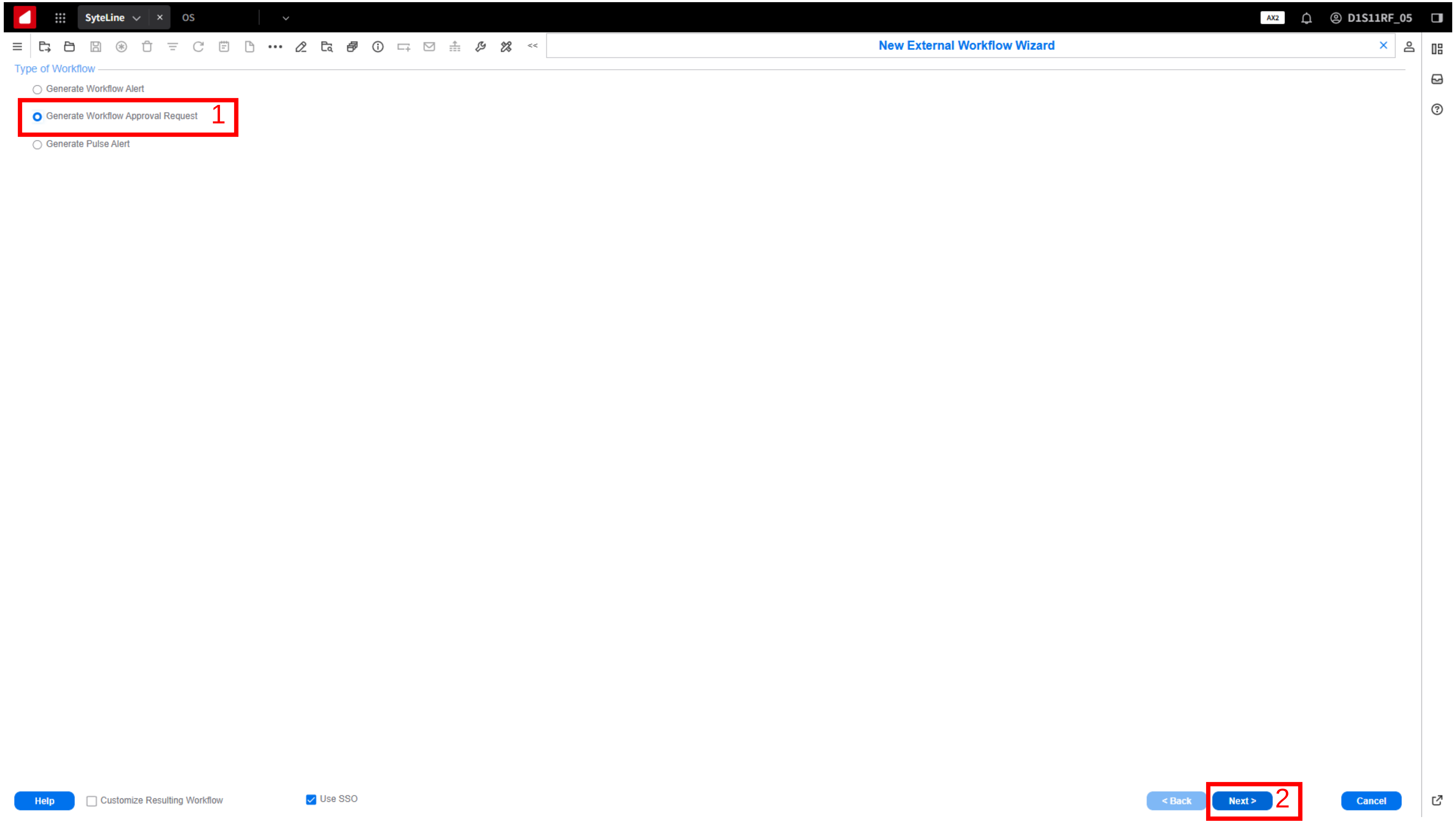
1. **CLICK** the Explorer icon to hide the Explorer menu



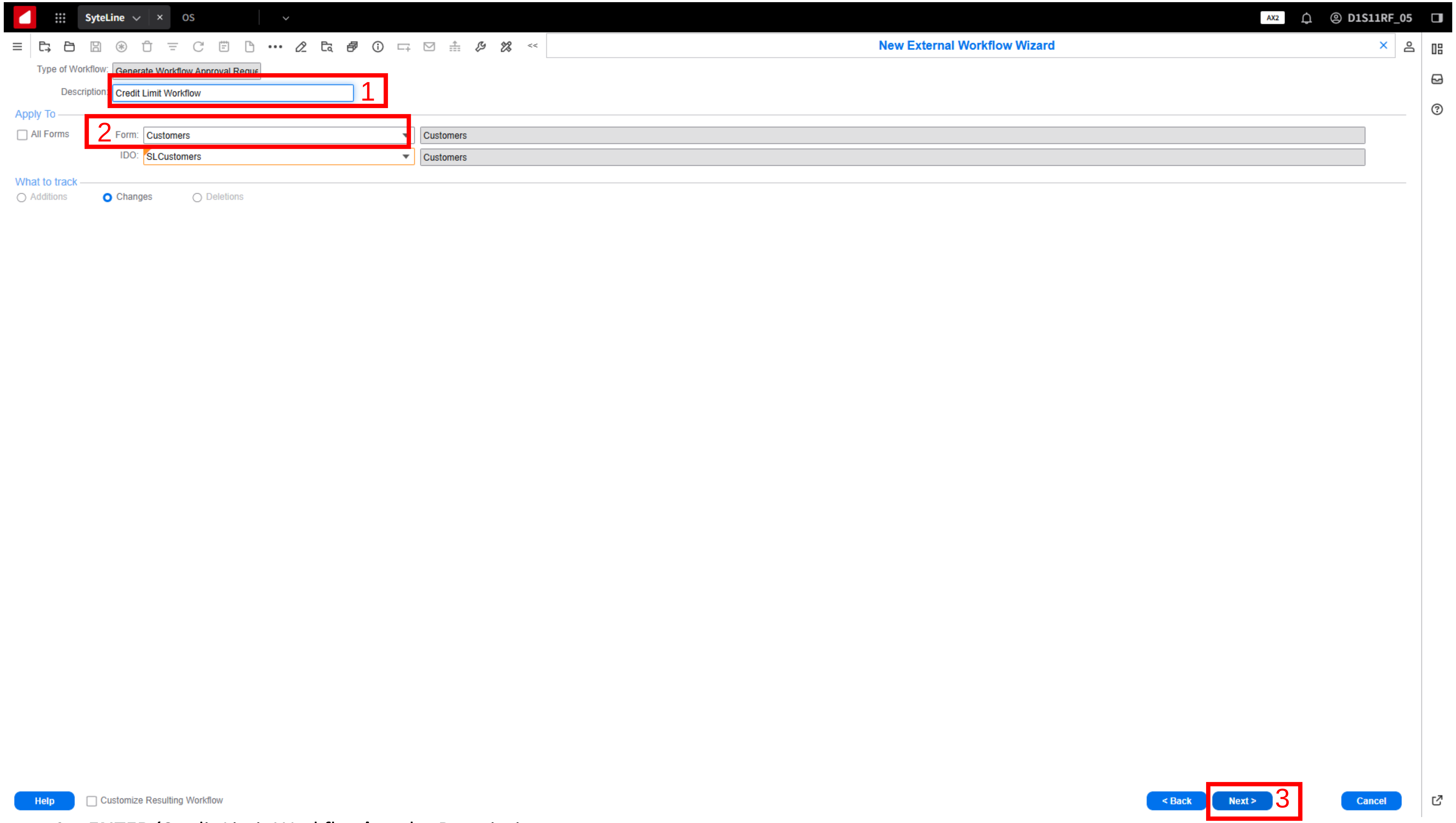
1. **CLICK** the Open folder



1. **ENTER** ‘workflow’ in Filter
2. **SELECT** *New External Workflow Wizard* from the list
3. **CLICK** OK

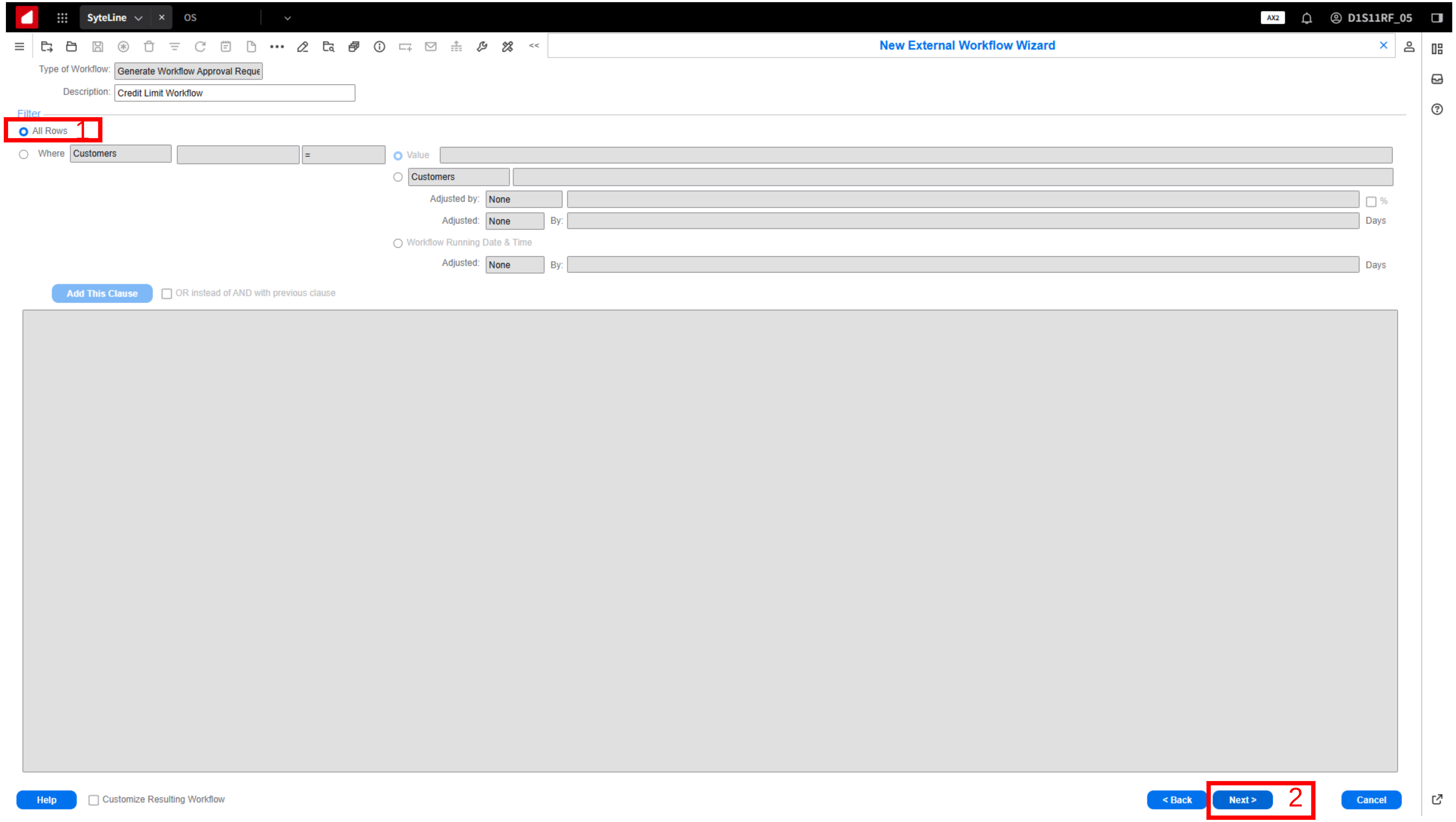


1. **ENABLE** “Generate Workflow Approval Request” radio button
2. **CLICK** the Next button

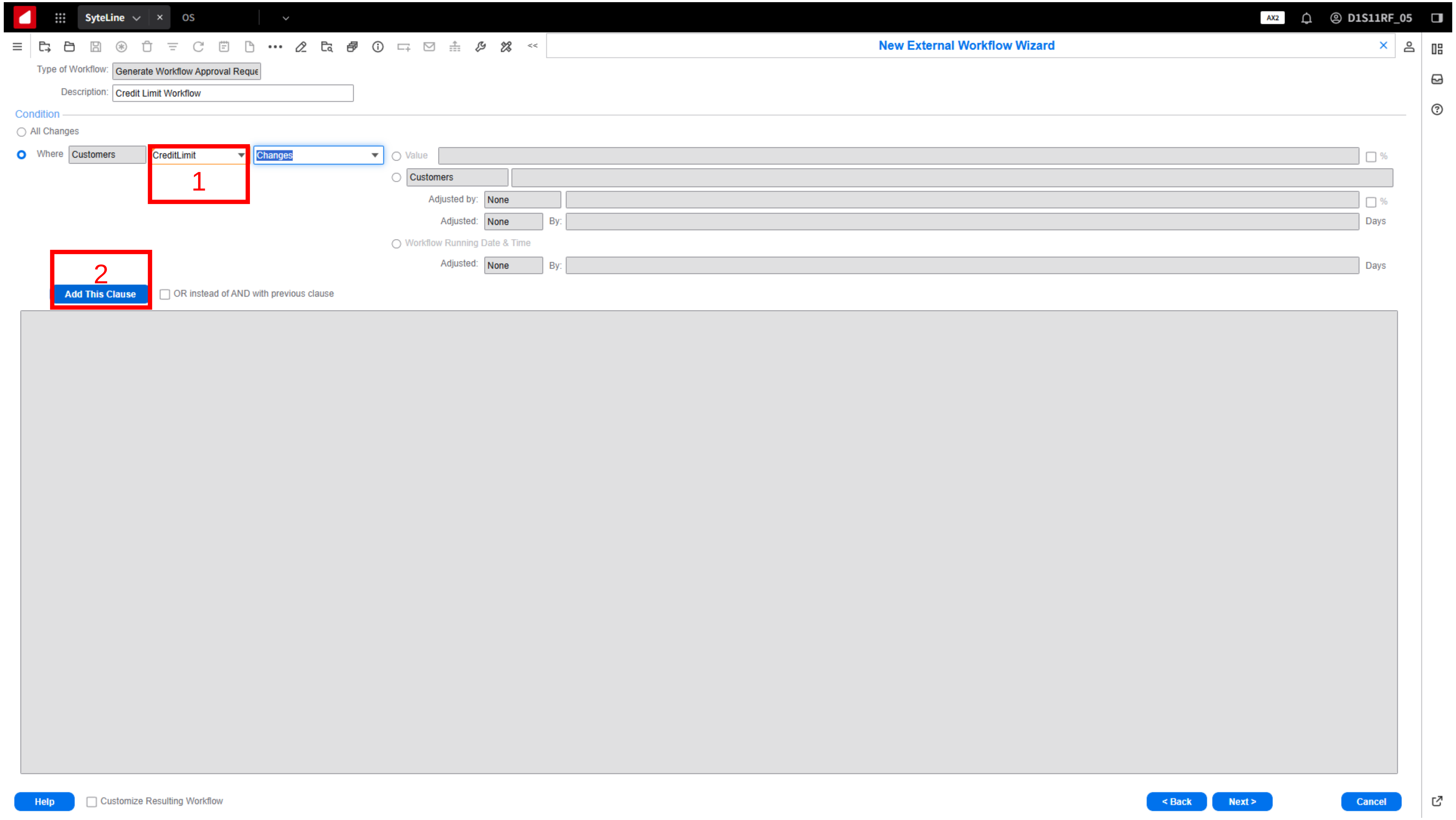


1. **ENTER** ‘Credit Limit Workflow’ as the Description
2. **ENTER** ‘Customers’ in the Form field and press TAB to populate the IDO with SLCustomers
3. **CLICK** the Next button

infor

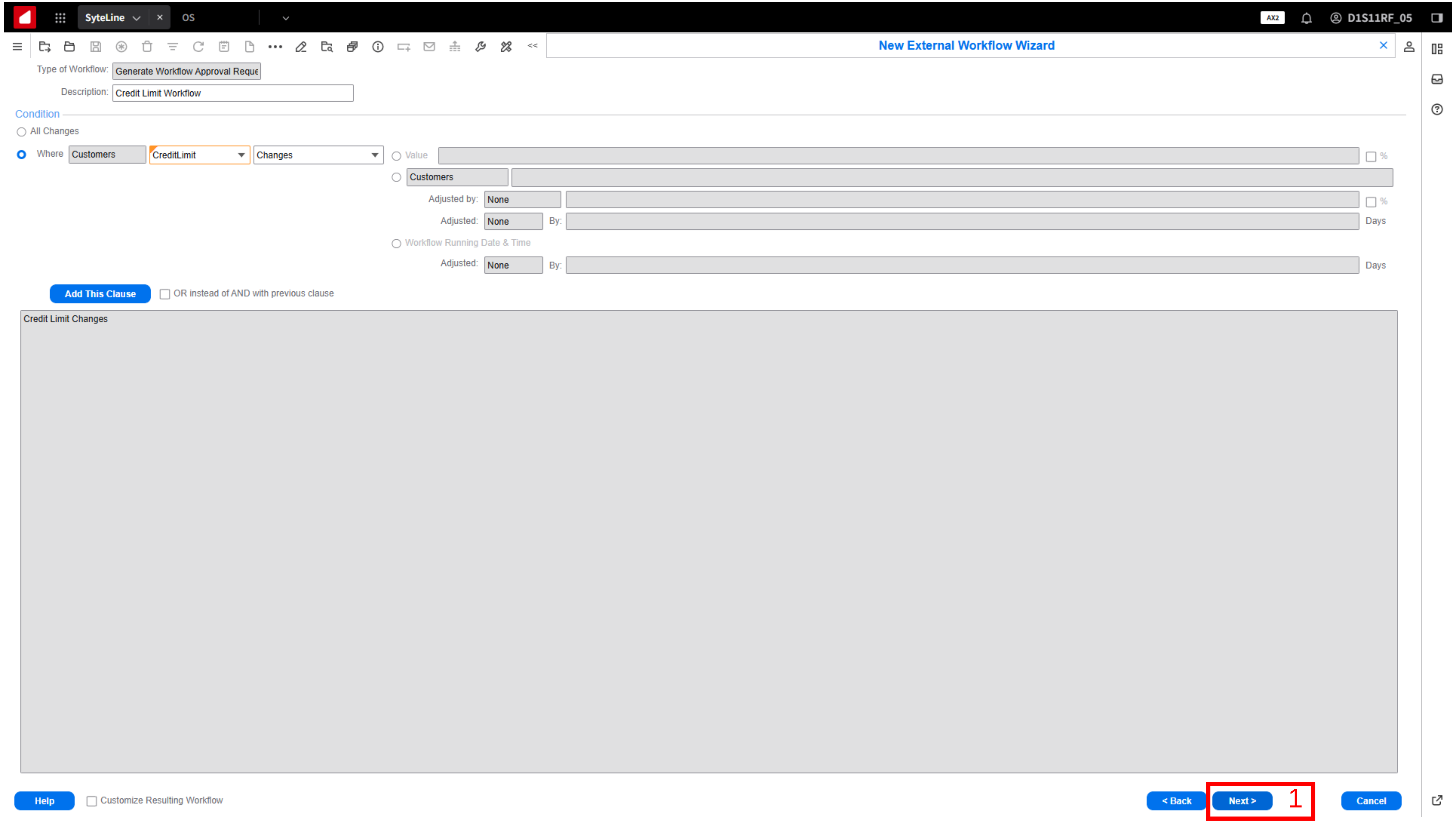


1. **ENABLE** All Rows radio button
2. **CLICK** the Next button

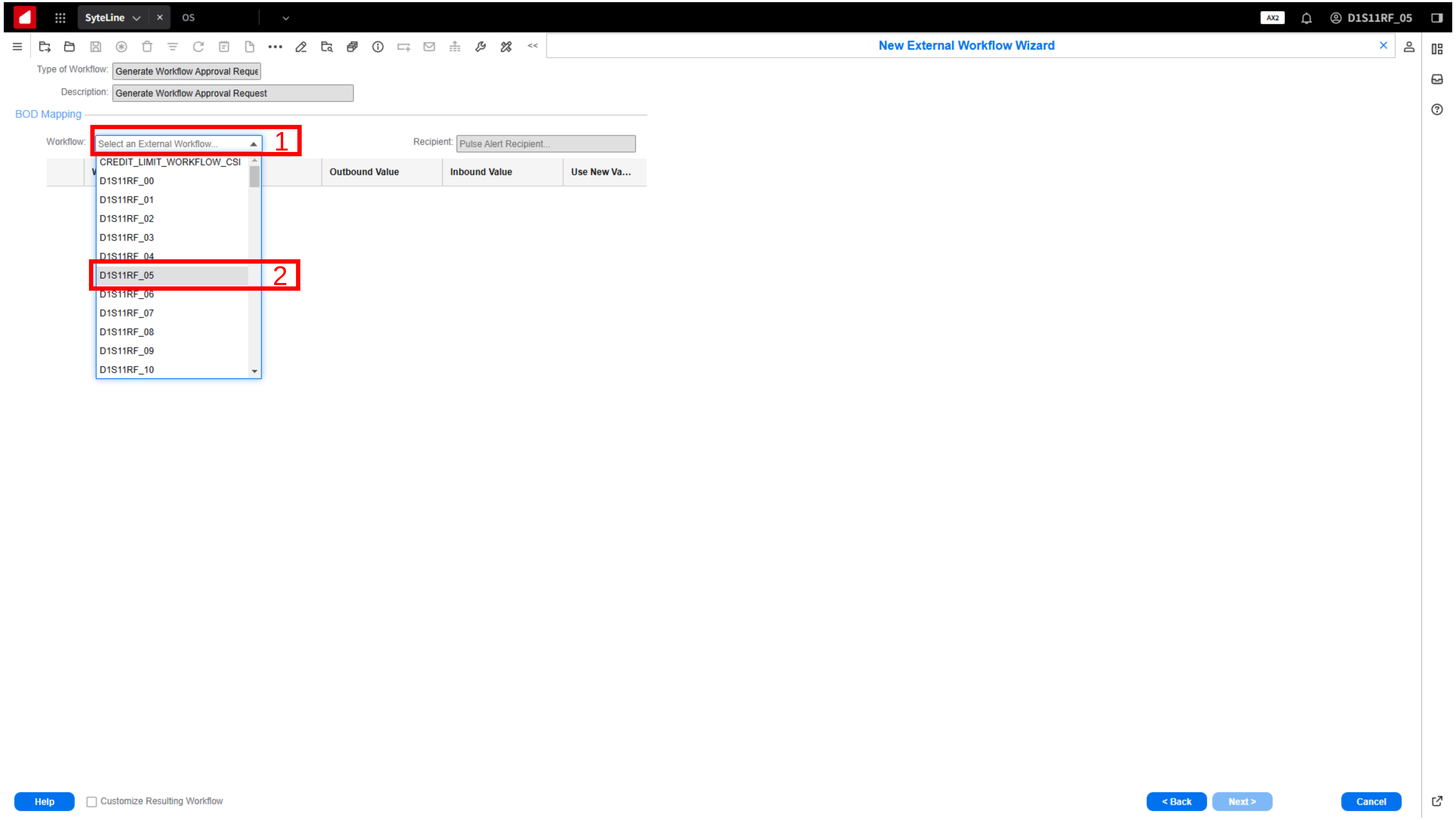


1. **ENTER ‘**CreditLimit**’** in the where condition and press TAB
2. **SELECT Add This Clause** ‘ION’ in the search bar

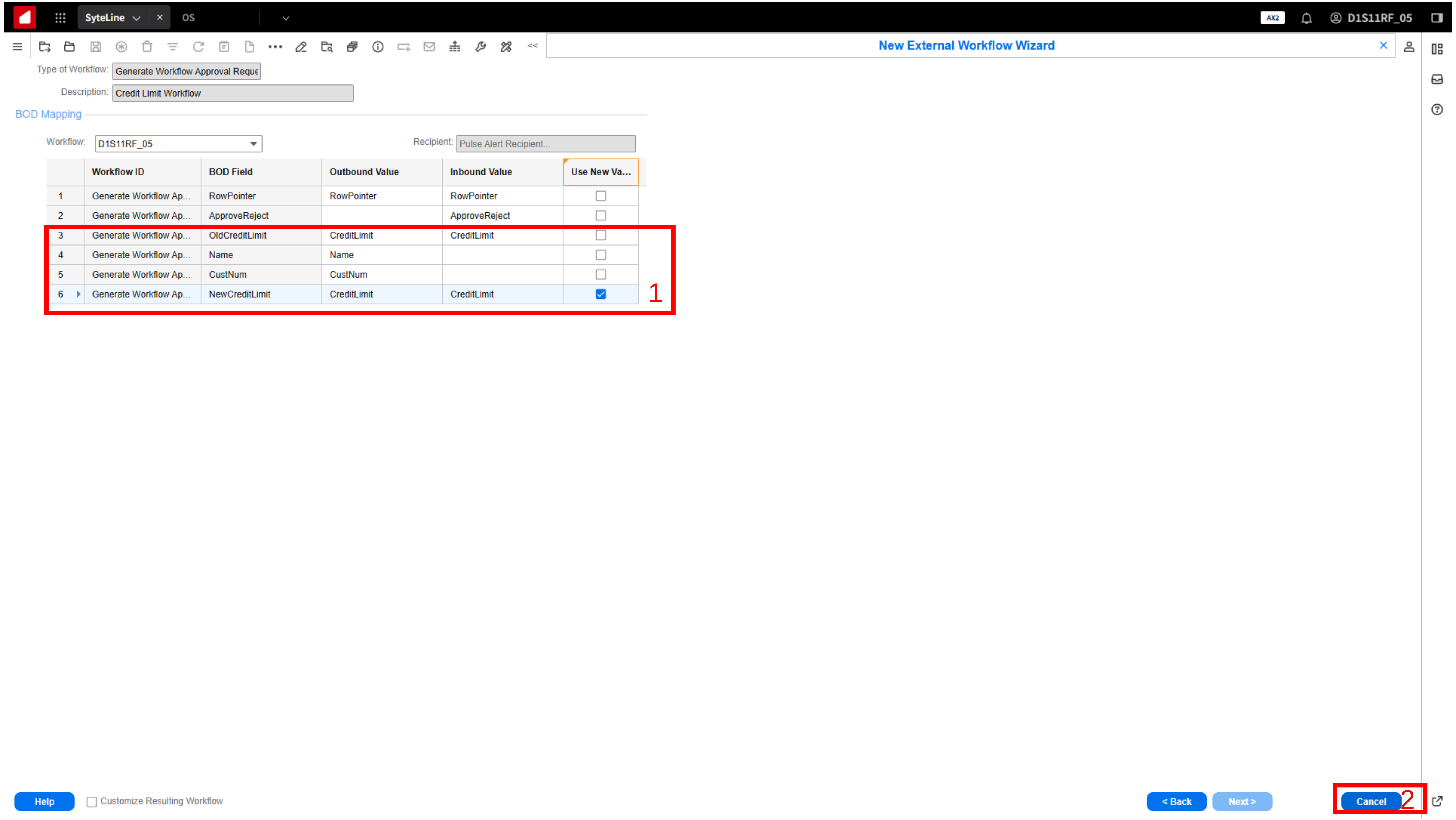
infor



1. **CLICK** the Next button

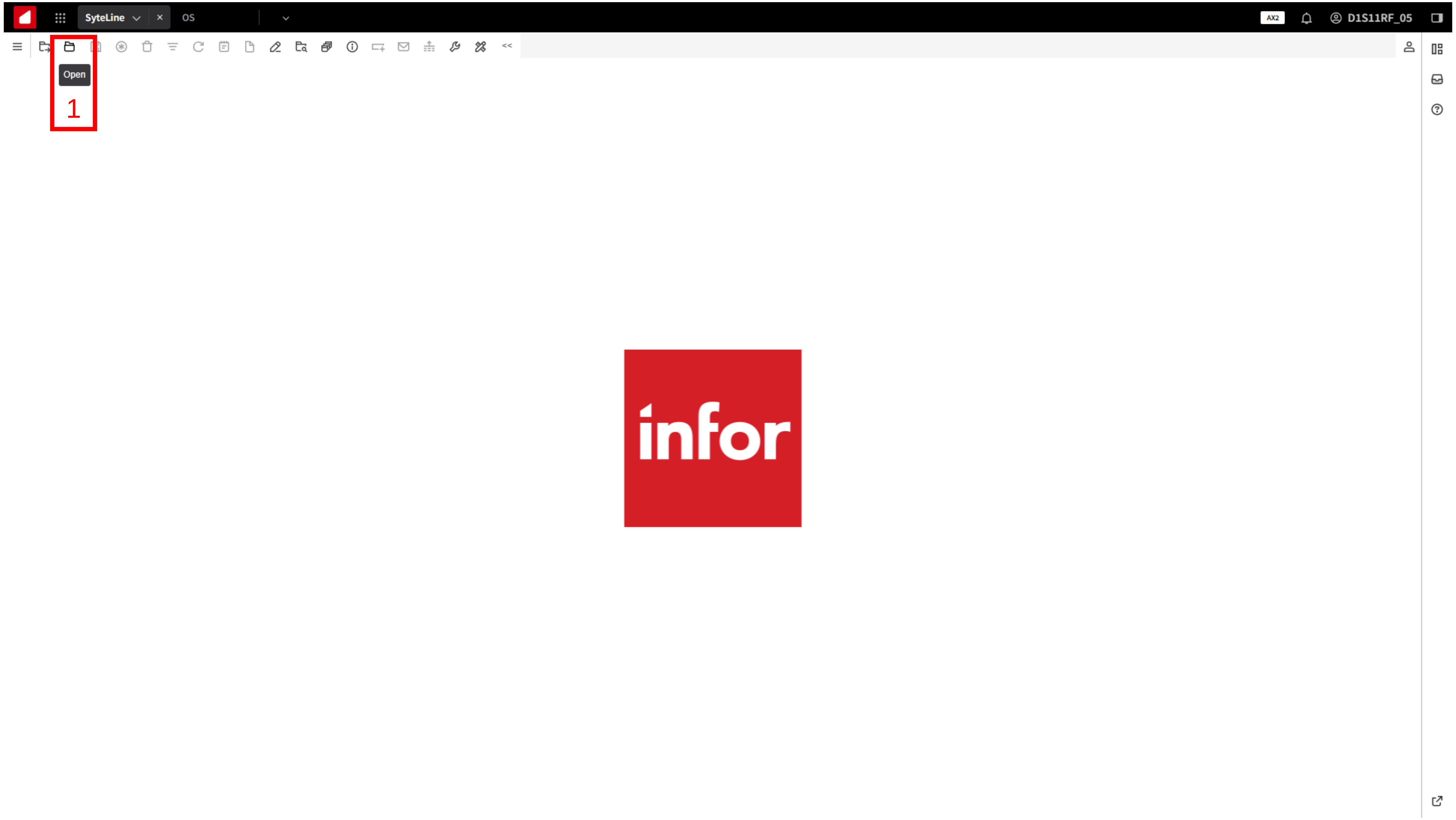


1. **CLICK** the dropdown arrow next to Workflow
2. **SELECT** your username for the workflow you created (ex D1S11RD_05)

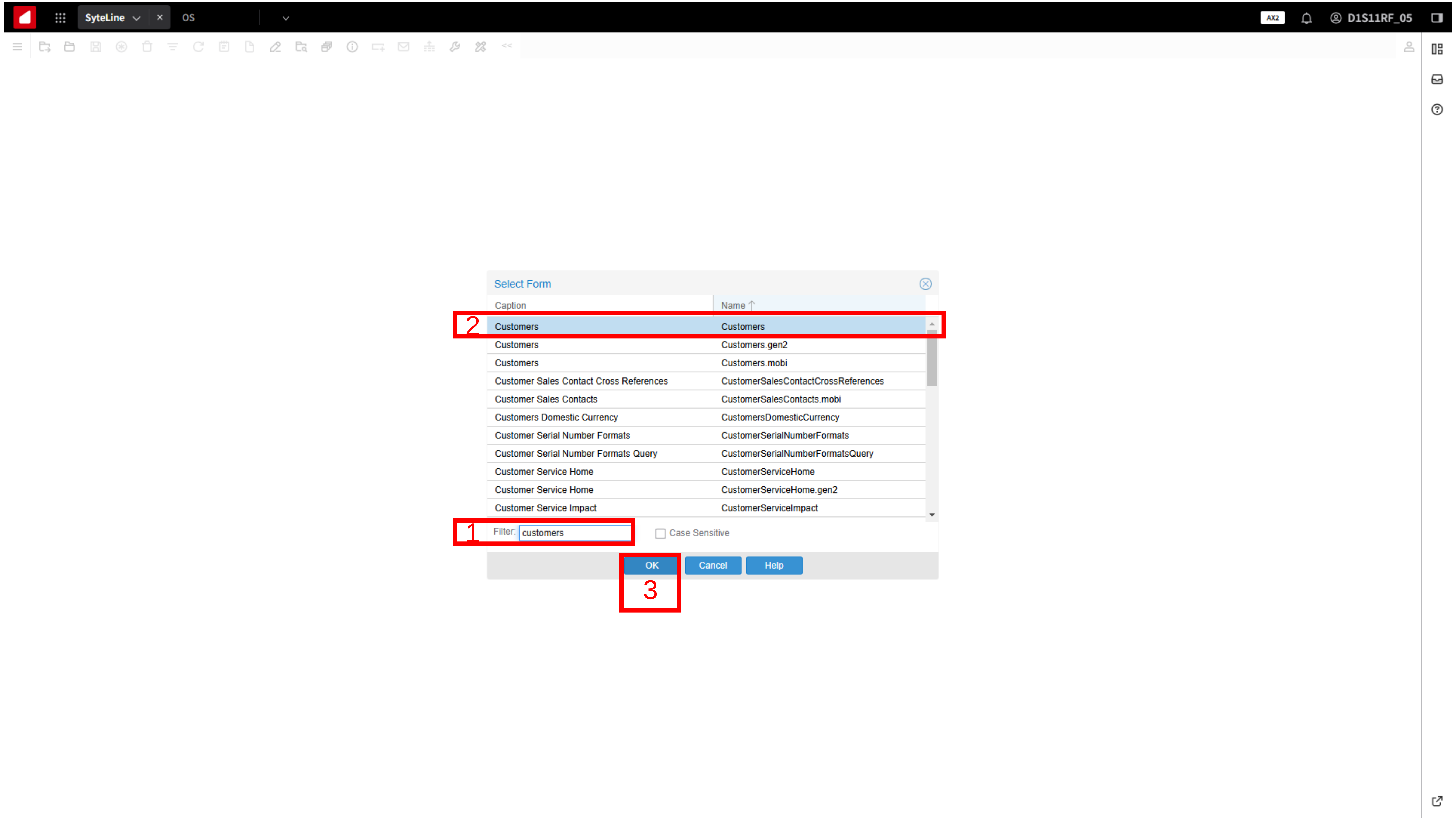


1. **ENTER** 'CreditLimit' for Outbound Value, press Tab and **ENTER** 'CreditLimit' for Inbound Values for OldCreditLimt BOD Field
   ENTER 'Name' and press Tab for Outbound Value for Name BOD Field
   SELECT *CustNum* from dropdown menu for Outbound for CustNum BOD Field
   ENTER 'CreditLimit' for Outbound Value, press Tab and
   ENTER 'CreditLimit' for Inbound Values for NewCreditLimt BOD Field and **CHECK** Use New Value
2. **CLICK** the Cancel button

Review

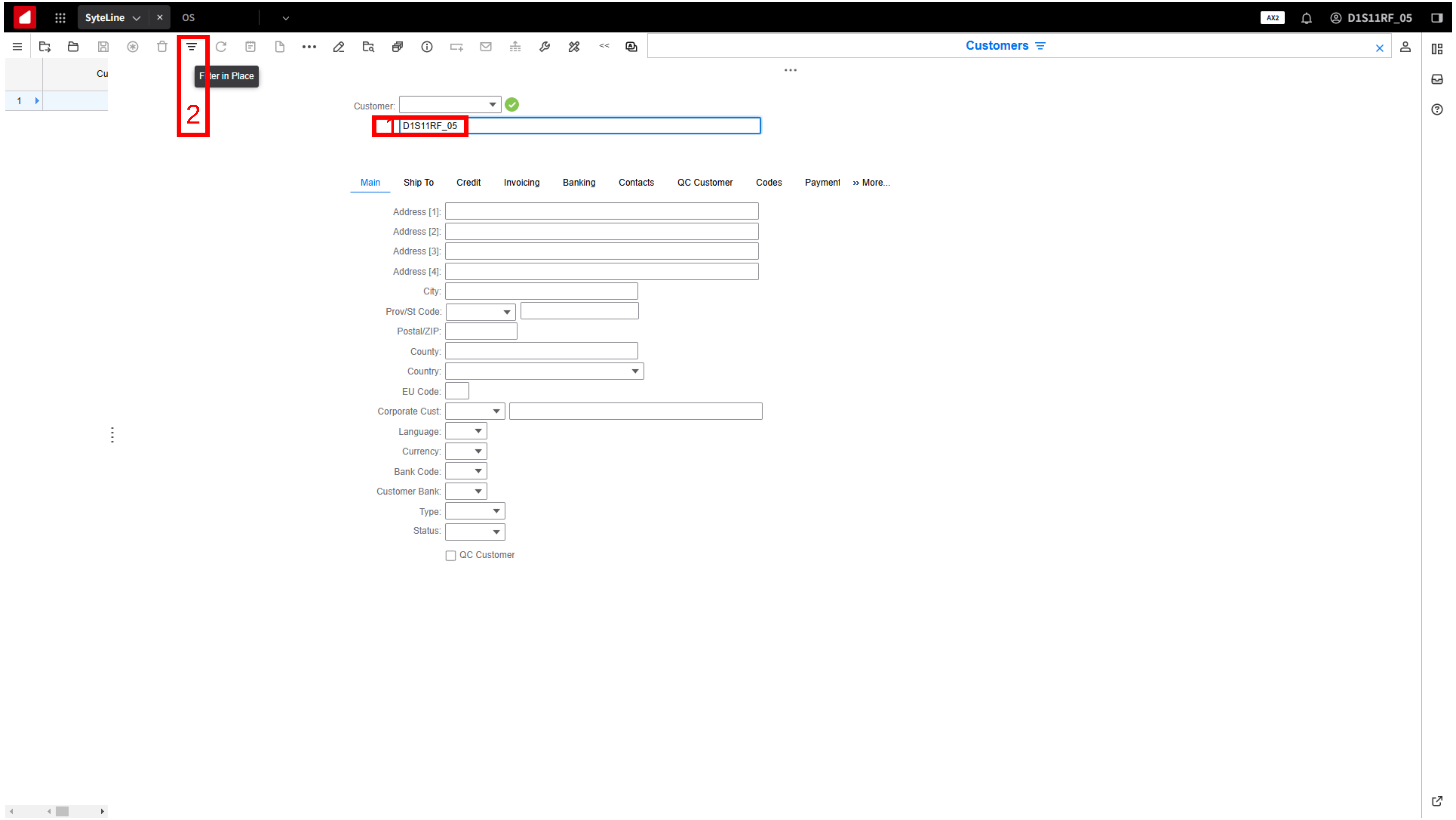


1. **CLICK** the Open folder

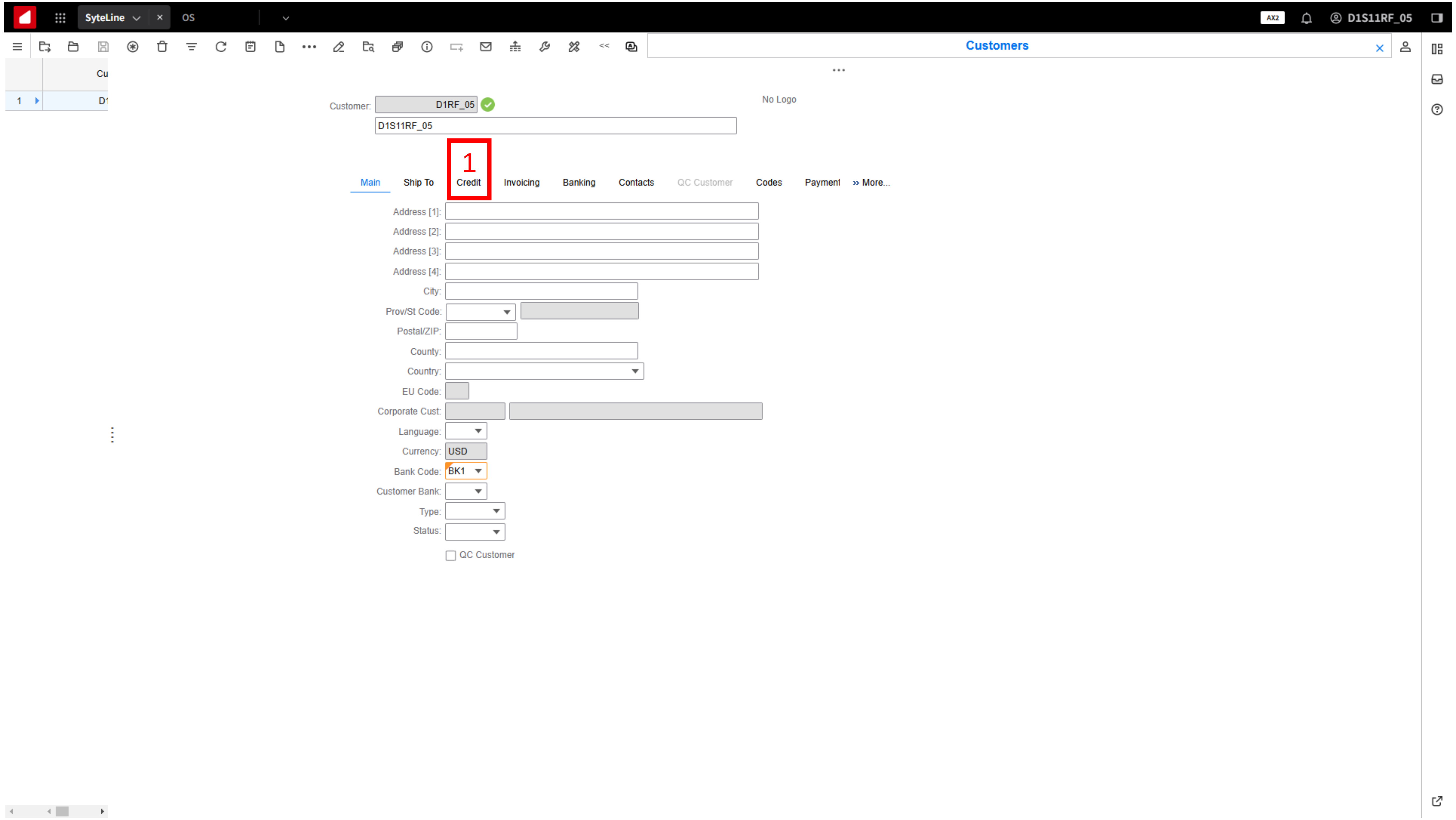


1. **ENTER** ‘customers’ in Filter
2. **SELECT** *Customers* from the list
3. **CLICK** OK

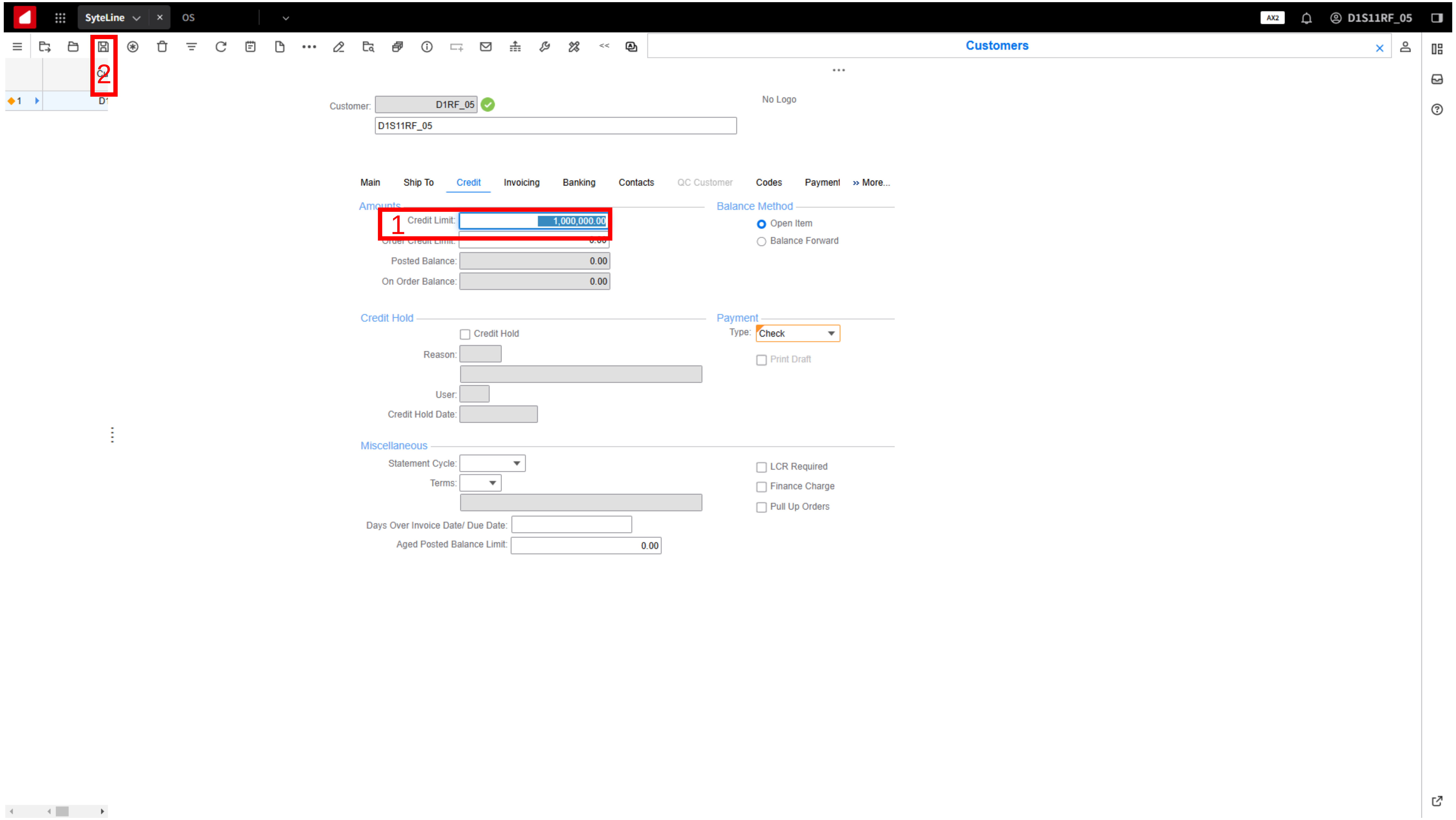
infor



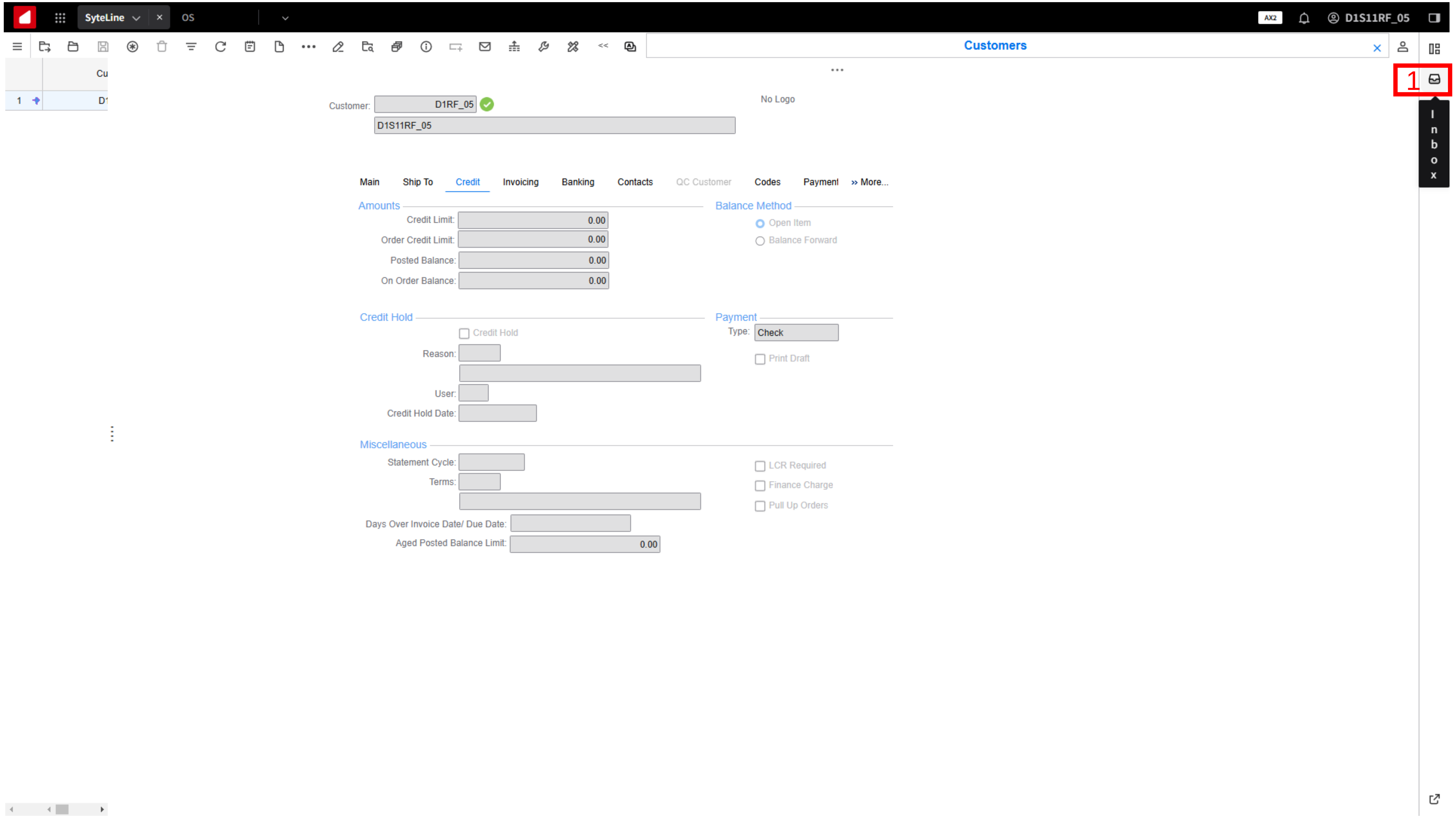
1. **ENTER** your username in the Description field
2. **CLICK** Filter in Place



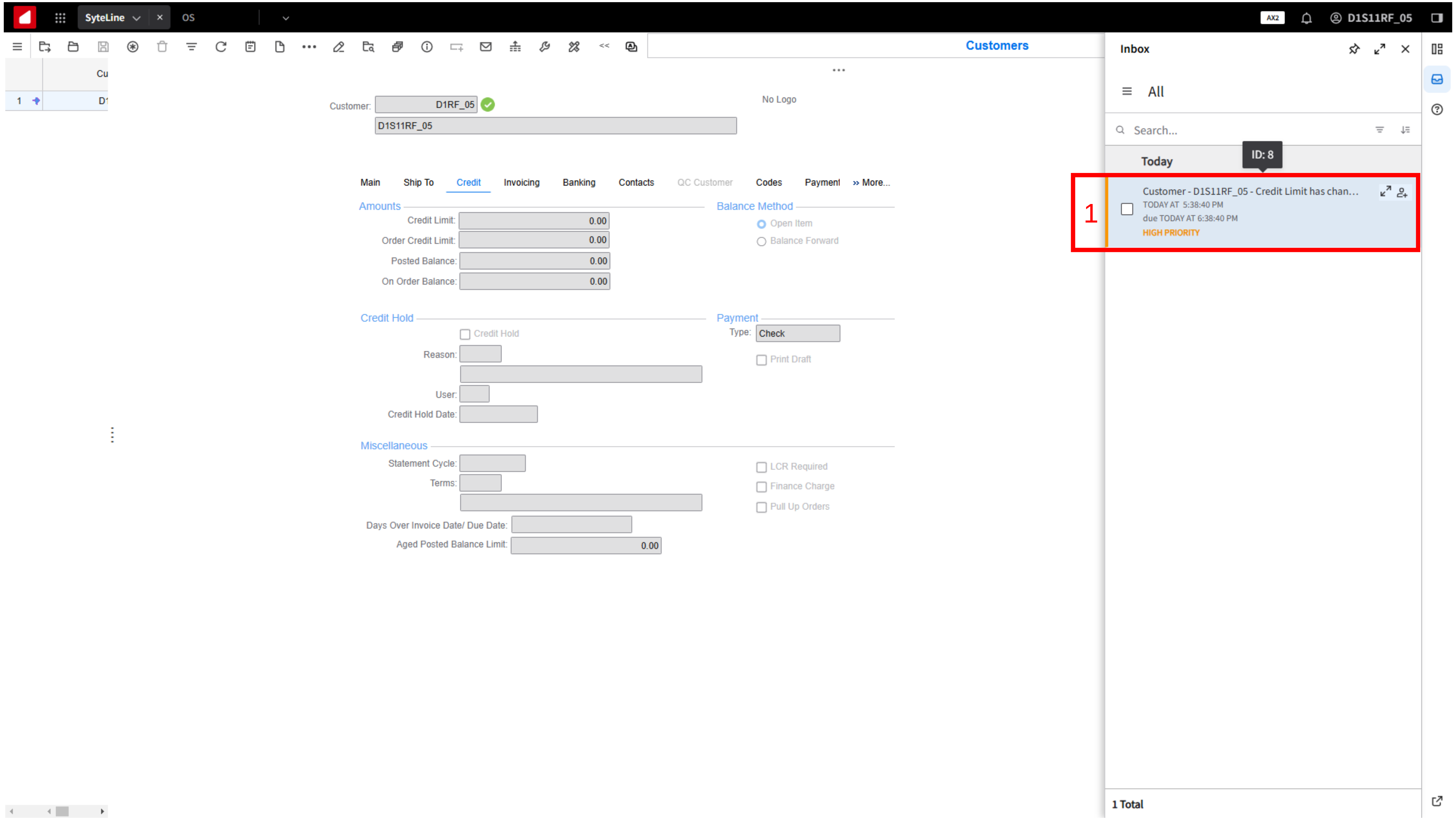
1. **CLICK** Credit to switch to Credit screen



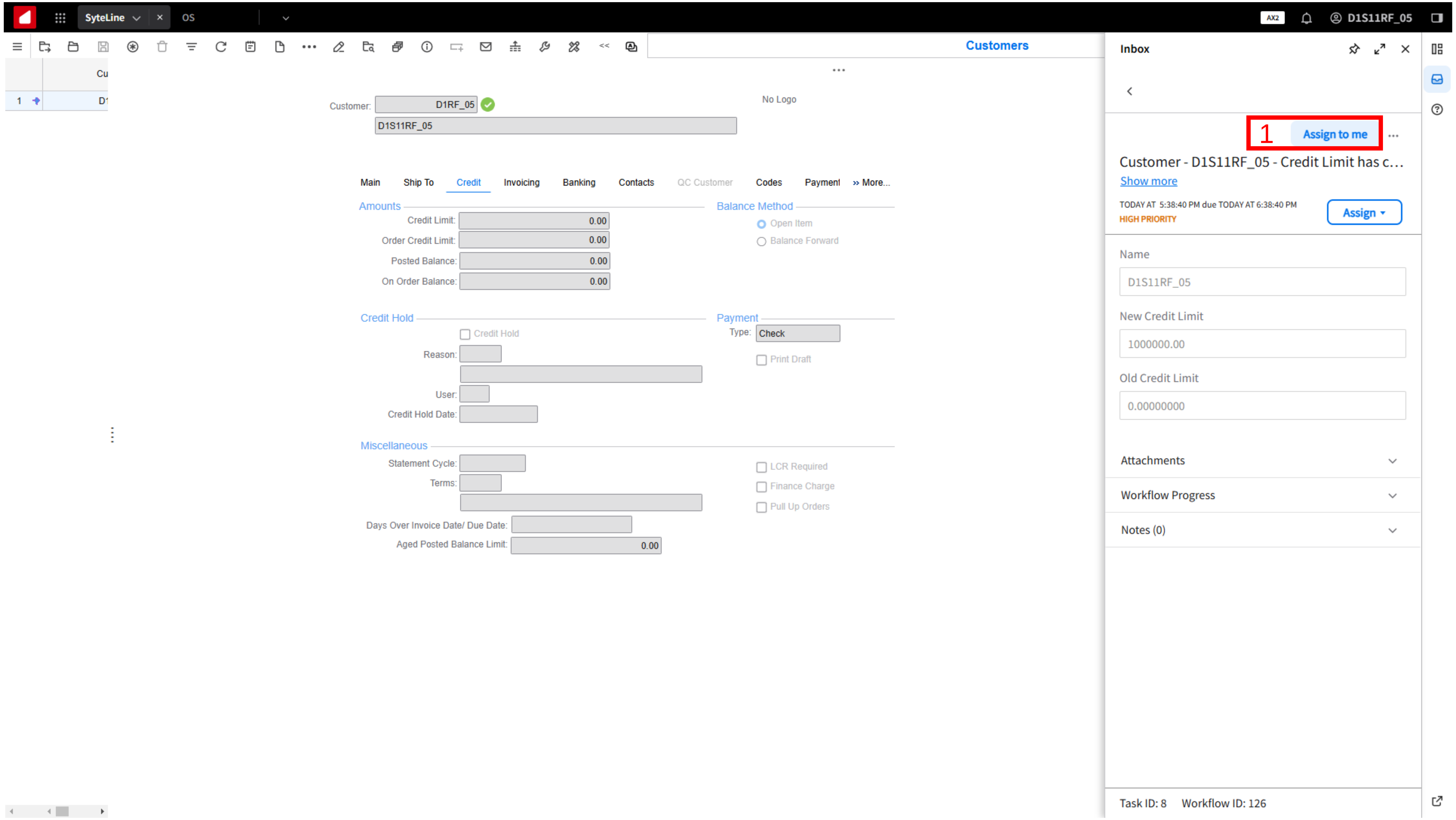
1. **ENTER** '1000000' for the new credit limit and press Tab
2. **CLICK** the Save button



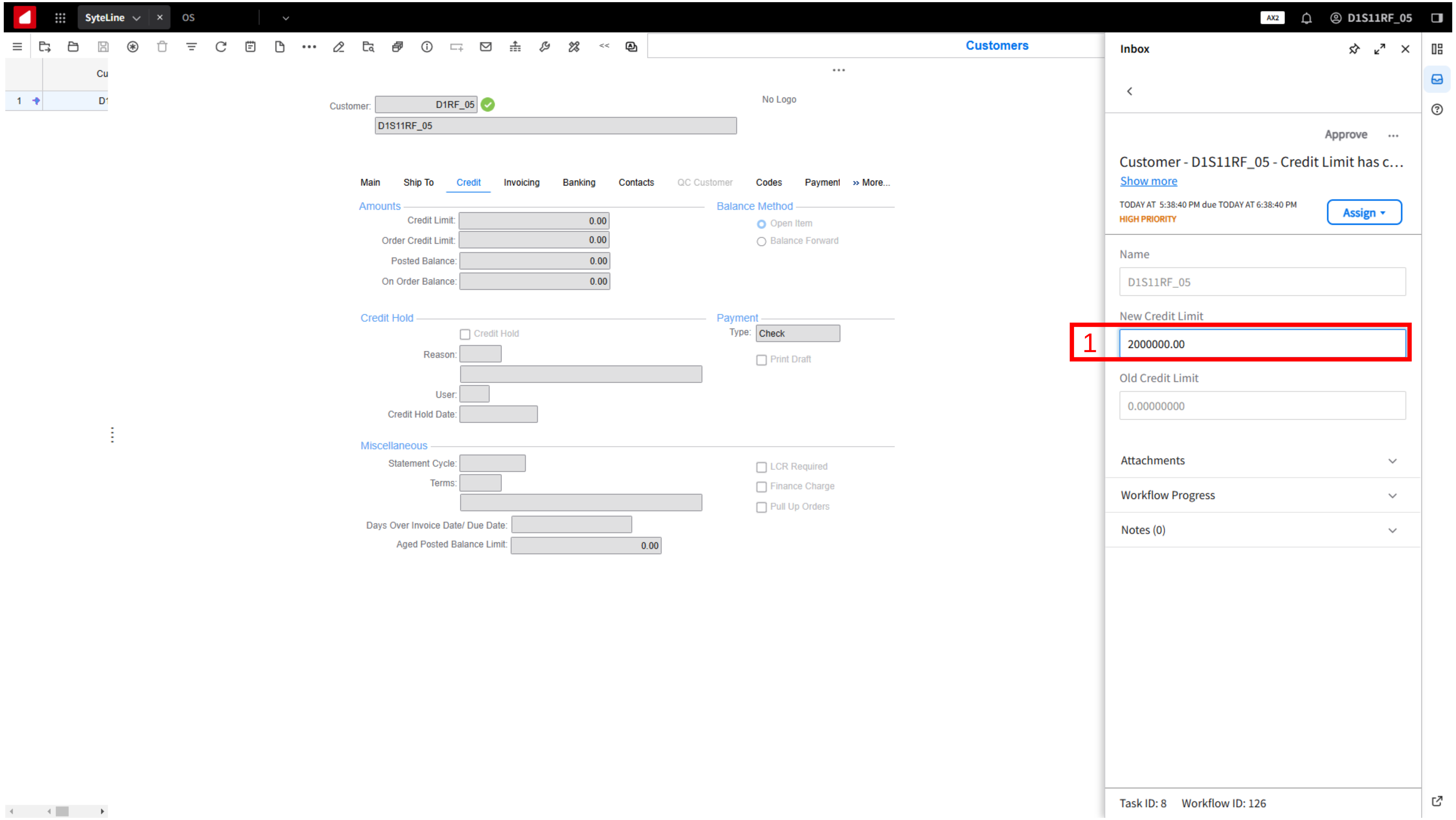
1. **CLICK** the Inbox in the Smart Panel



1. **CLICK** on the new message in your inbox

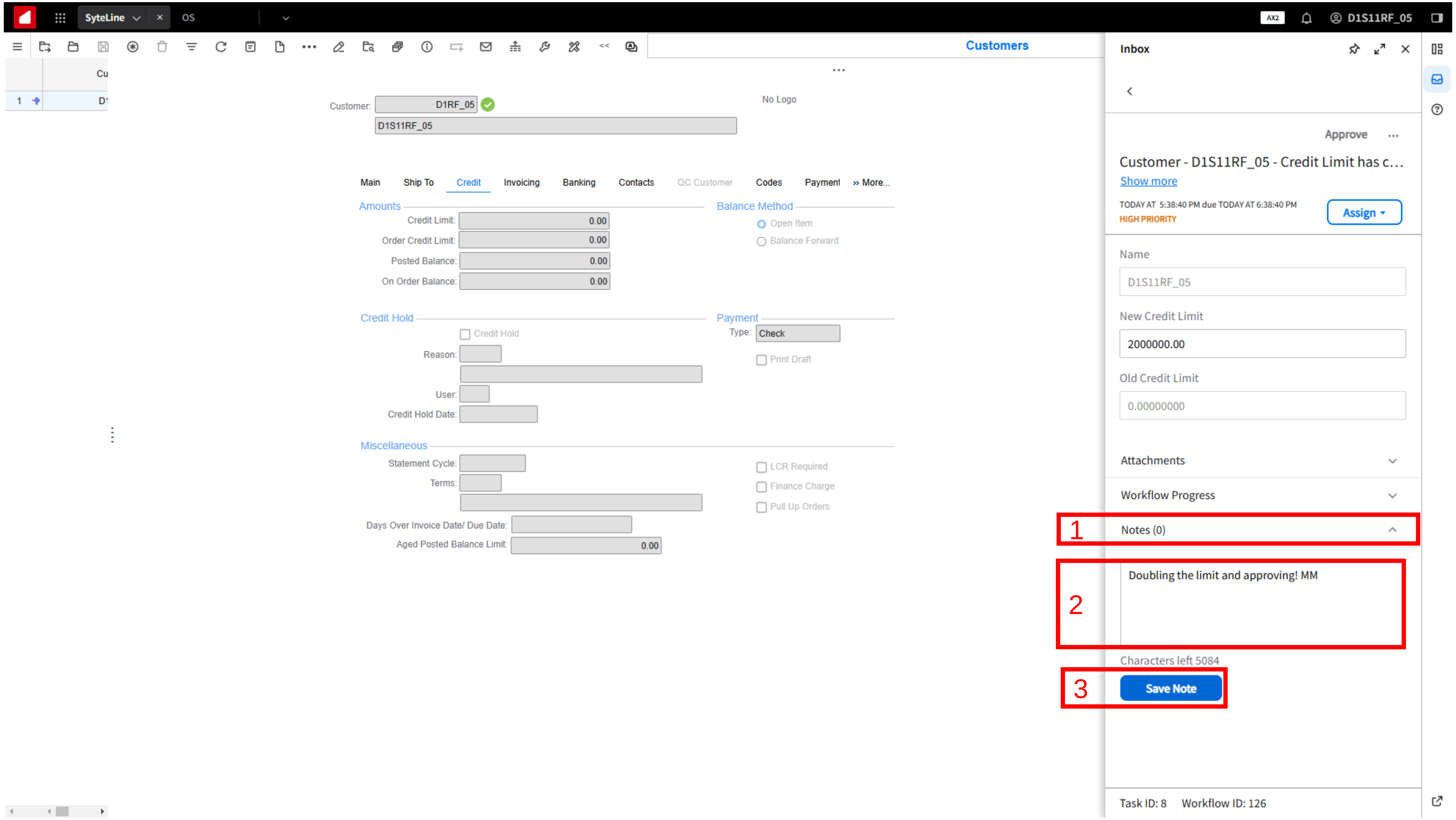


1. **CLICK** Assign to me button

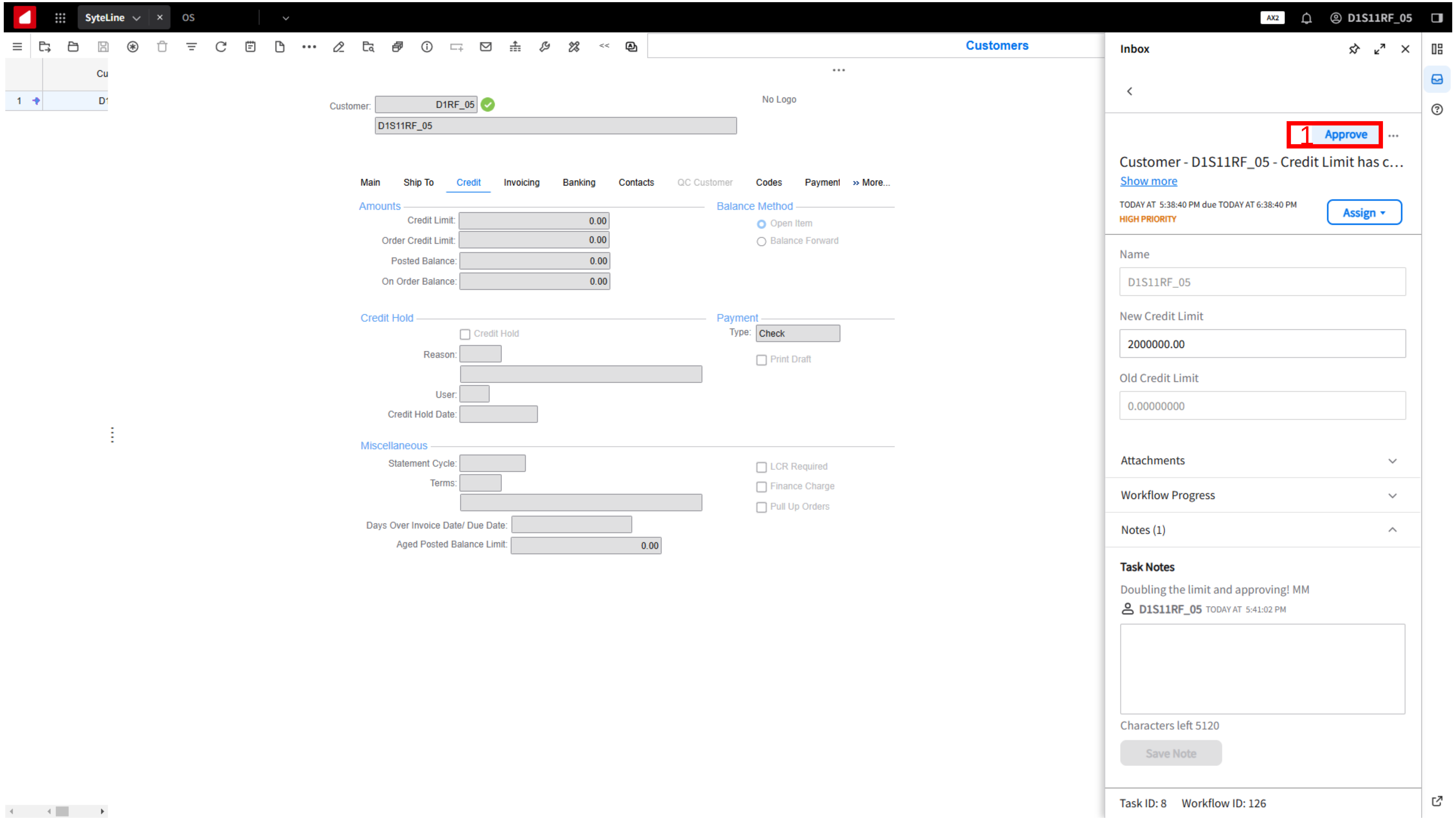


1. **CHANGE** the value for the New Credit Limit field to $2,000,000

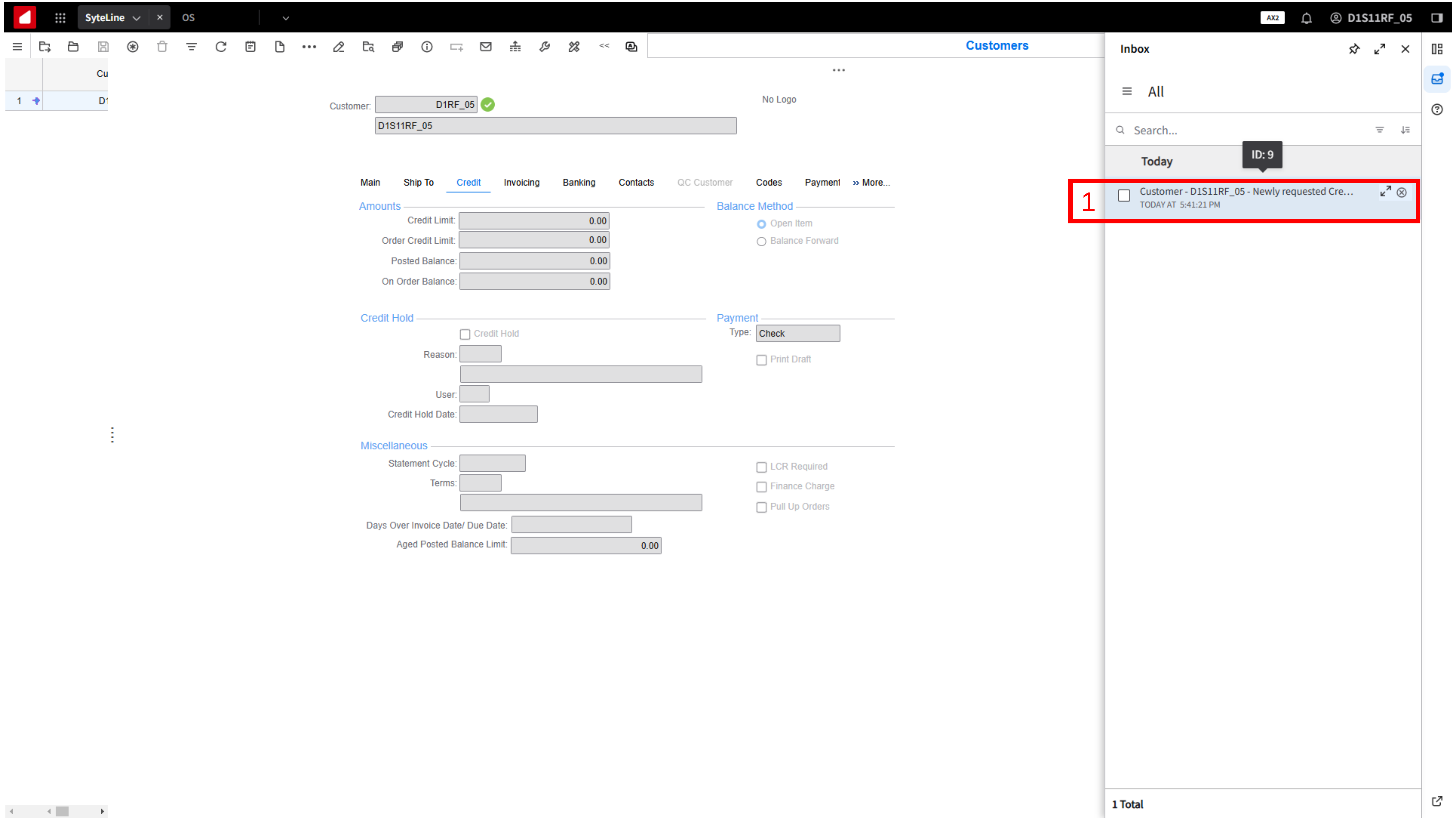
infor



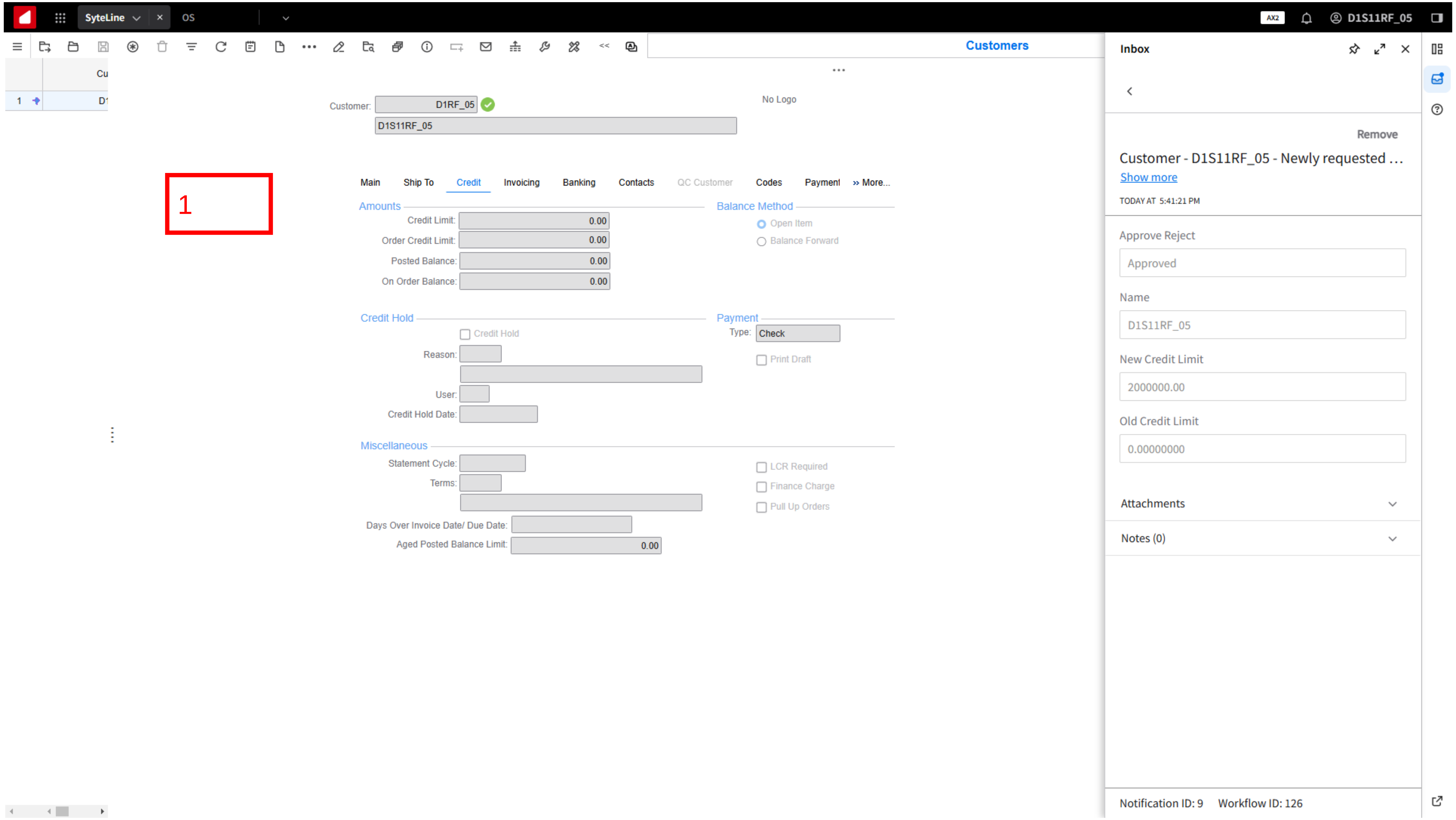
1. **EXPAND** Notes
2. **ENTER** a message in the Notes field
3. **CLICK** Save Note



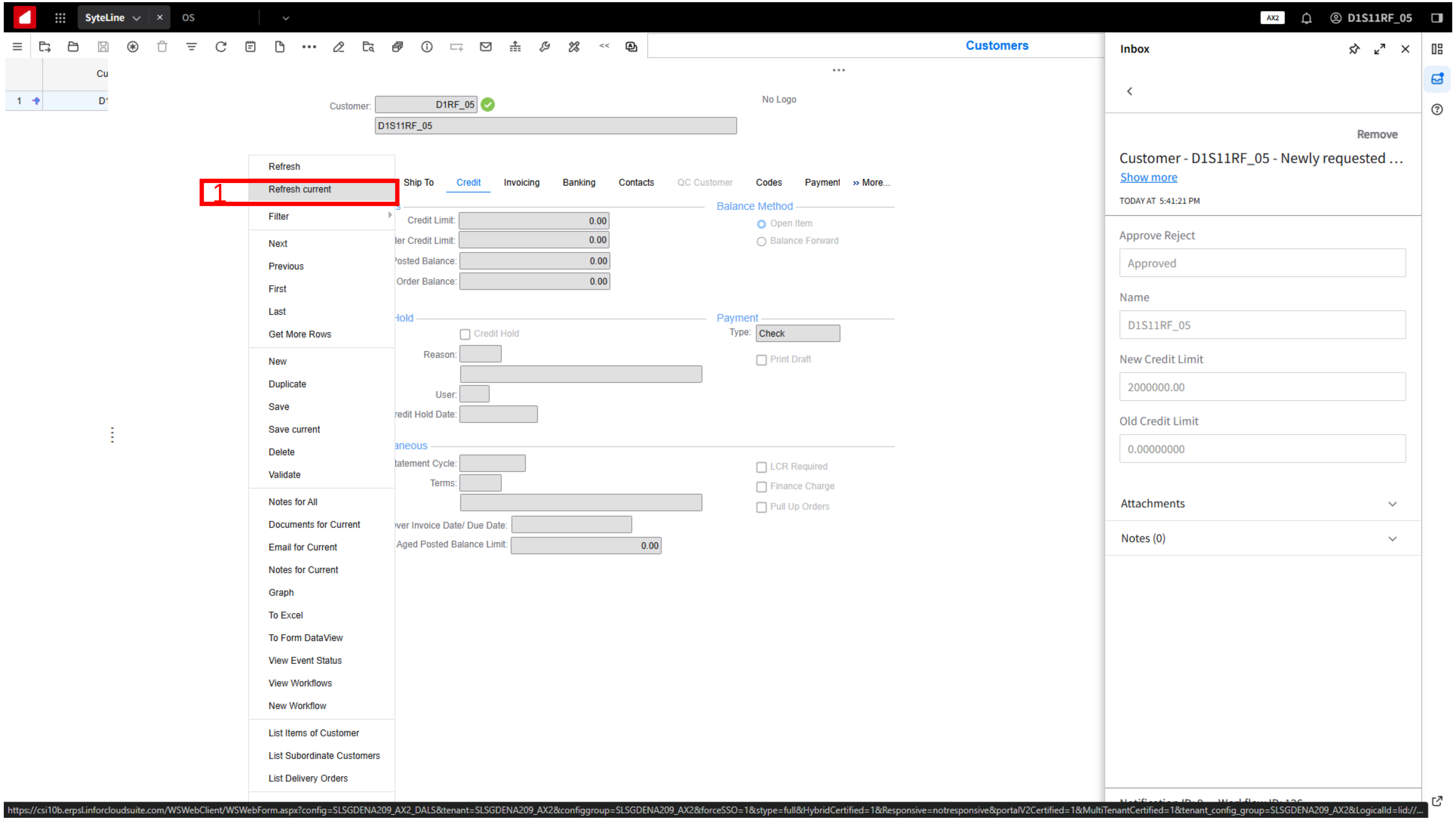
1. **CLICK** Approve



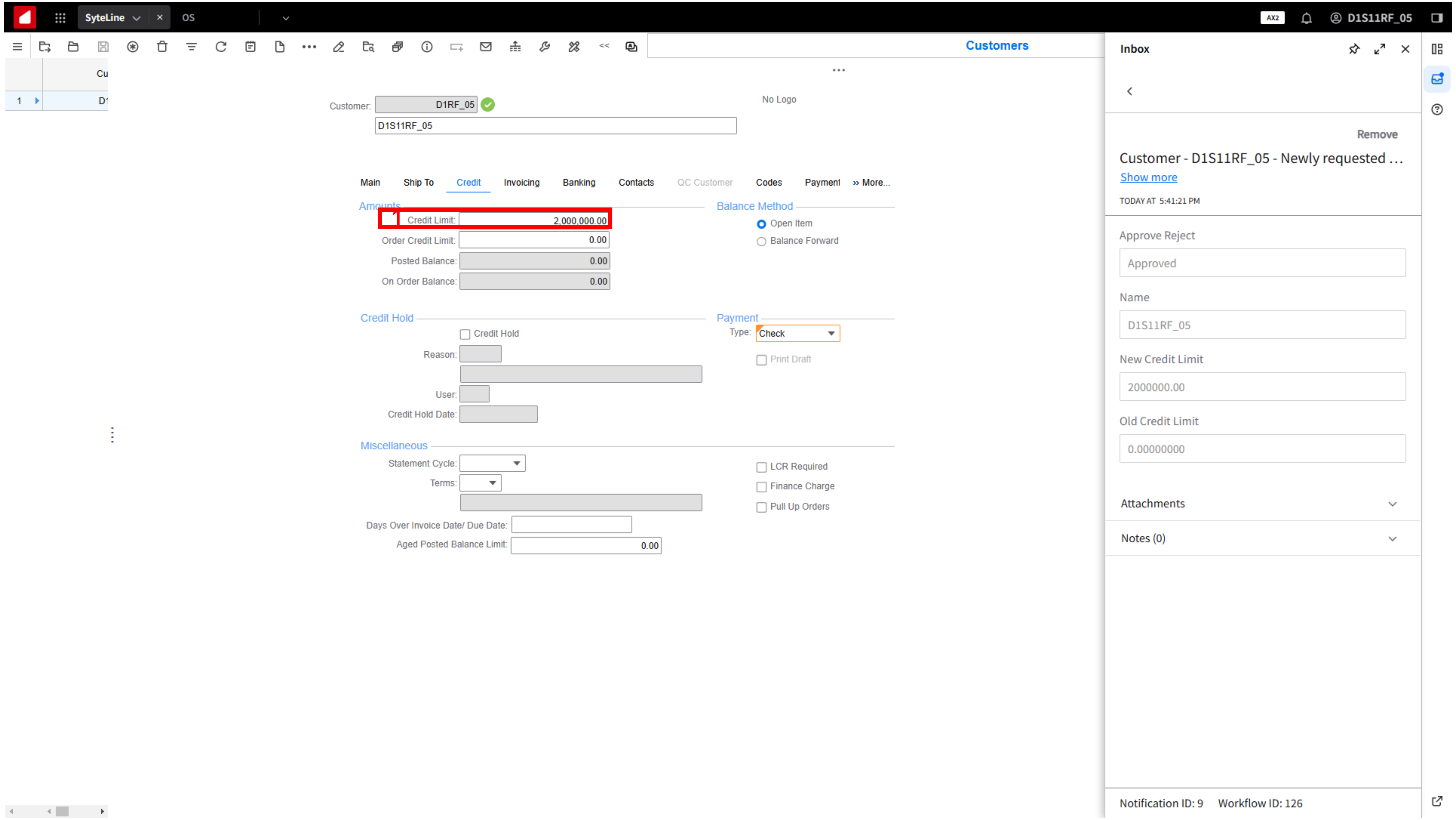
1. **CLICK** on the new message in your inbox



1. **RIGHT CLICK** in the white space to the left of the form



1. **SELECT** Refresh Current



1. The record is unlocked, and the credit limit has been updated to the new value.

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