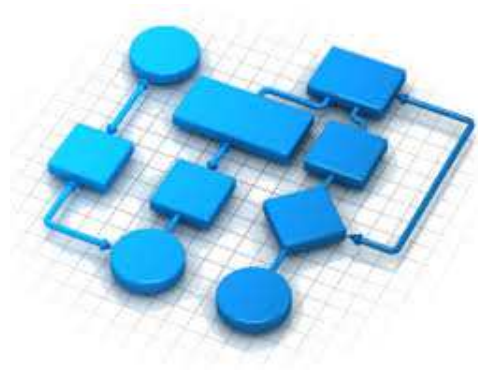


Synergy Enterprise Workflow



Presented:

Dave Kloepfer



SYNERGYEXPERT.COM

What is Workflow?

- Workflow are Tasks Which are Assigned to a Resource / Role (Group of Employees)
- A Workflow Task May be Created by the Resource for Themselves to Complete (such as a Post-It Note Reminder)
- A Workflow Task May be Created by a Resource for Another Resource to Complete
- A Workflow Task May be Created Using a Process Flow for Linear Business Processes
- By Default, a Workflow May Have 4 Steps, However Additional (Unlimited) Steps May Be Added Using the Event Manager

What is Workflow?

- Workflow Should be Considered Tasks that Need to be Completed And Tracked
- Workflow Can Have Multiple Steps (Created, Open, Approved, Realized, Processed, Draft or Rejected) that may have Other Descriptions
- Workflow Can Involve Multiple Resources
- Workflow Can Involve Roles instead of Resources
- Workflow Can Have Optional and Required Fields
- Workflow Can Show Different Information at Various Stages

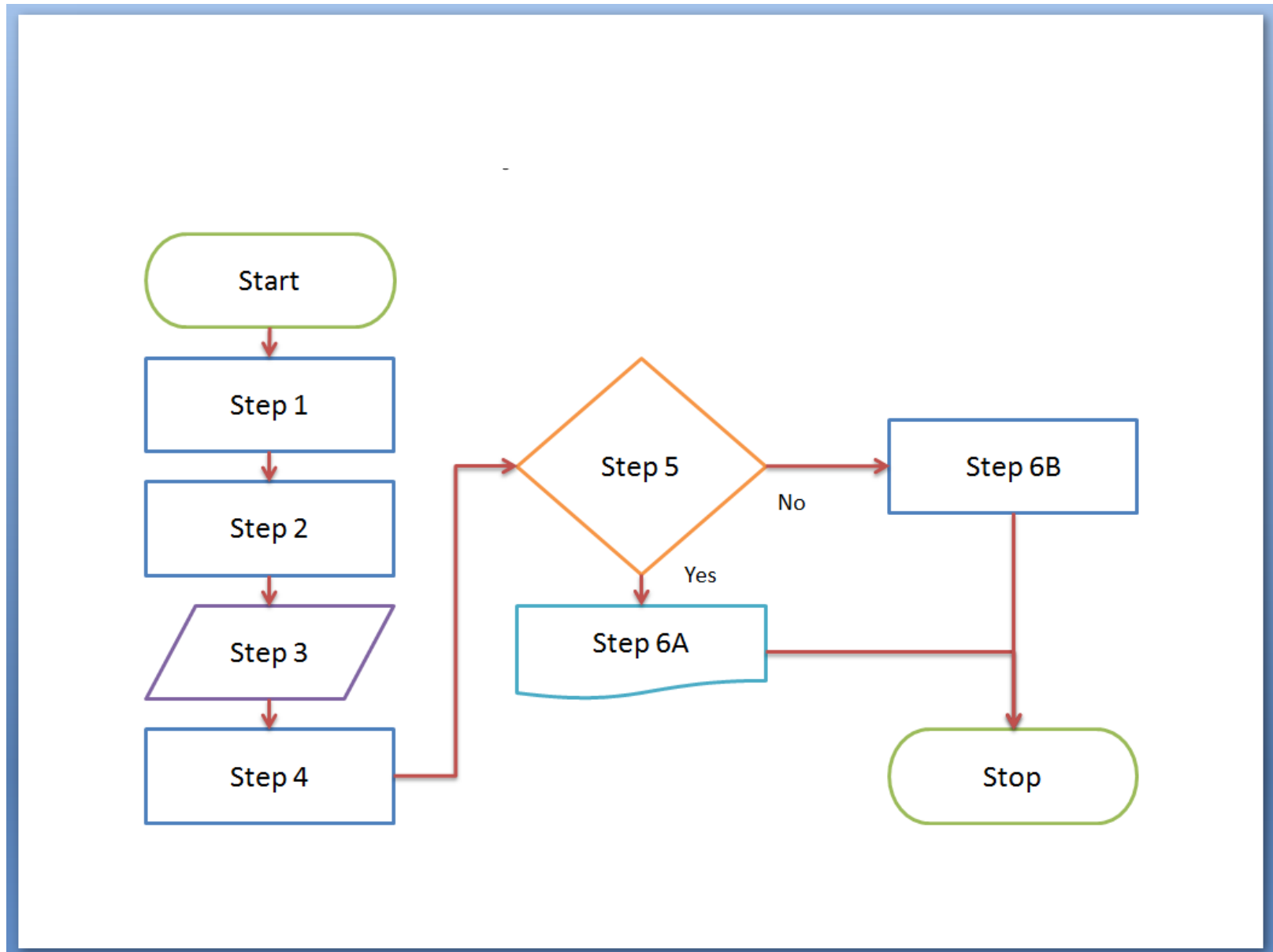
What is Workflow?

- Workflow Can Be Linked to Resources, Accounts, Contacts, Projects, Documents, Requests, Items, Opportunities or Assortments
- Workflow Can Be Made Private (Just Between Participants)
- Workflow Can Have Security Levels Assigned
- Workflow Data Can be Used in Reports and Views
- A Workflow Task May be Created by the Event Manager for a Resource to Complete (Based upon Logic Based Rules and Events / Non-Events Occurrence in SQL Databases)

What is Workflow?

- Workflow Can Be Linked to Previously Created Workflow Requests
- Workflow can include Additional Action Steps such as Assume, Assign, Reject, Reopen and Delete
- Reporting can be Done on Workflow Request Types and Individual Fields
- Workflow can Ensure that Business Processes are Completed According to Corporate Procedures or can Identify Issues that Develop

Workflow Process Flowchart



What Departments Can Use Workflows?

Workflow Processes can Mimic any Processes that you have within Your Business:

- ✓ Sales – Account Management, Opportunity Tracking,
- ✓ Marketing – Trade Shows, Marketing Campaigns
- ✓ Customer Service – RMAs, Customer Inquiries
- ✓ Accounting – New Account Set-up, W-9s from Accounts
- ✓ Inventory Management – Tracking Shipments
- ✓ Purchasing – Purchasing Requisition Process
- ✓ Production – Non Conformance, Corrective Actions
- ✓ Quality Management – ISO or Other Initiatives
- ✓ Human Resources – Staff Training, Expense Reporting, Reviews
- ✓ And This is Just a Sample.

Workflow Enhancements

- A Workflow may be created using Multiple Approvers, Realizers or Processors can be defined in request settings. This allows “All” resources in a role to complete the step before it is advanced to the next status. *(This requires a Tool from SynergyExpert.com)*
- Workflow may have validation rules created using data from Synergy or other SQL databases. *(This requires a Tool from SynergyExpert.com)*
- Workflow may have additional free fields that can be used for more information. *(This requires a Tool from our SynergyExpert.com)*

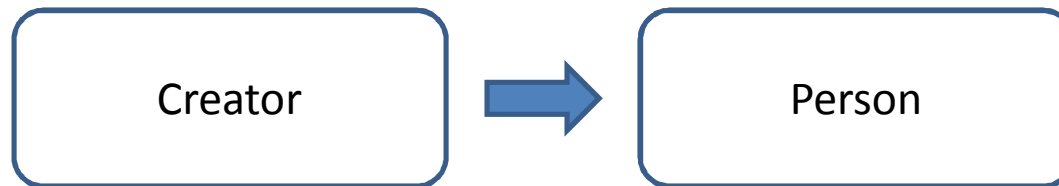
Workflow Enhancements

- A Workflow may have SSRS Reports Embedded, Allowing Resources to Review Data Needed for Moving Request to Next Status. *(This requires a Tool from our organization)*
- Workflow Fields may have Cascading Fields, Where the value in the First Field Directs Options in the Next Field. *(This requires a Tool from our organization)*
- Workflow may include Data from other SQL databases to Allow Only Validated Information. *(This requires a Tool from our organization)*
- Other Workflow Enhancements are Possible Through Tools from our organization

Example of To Do Request

A Workflow Task May be Created by the Resource for Themselves to Complete (such as a Post-It Note Reminder).

A Workflow Task May be Created by a Resource for Another Resource to Complete.

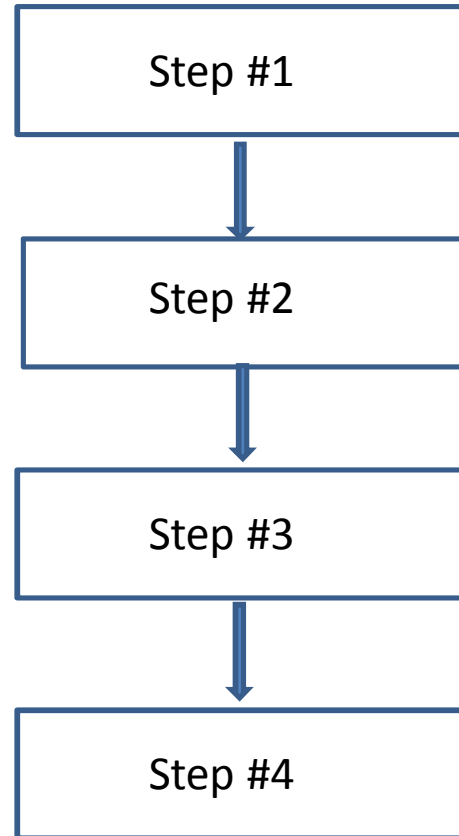


Example of To Do with Reply

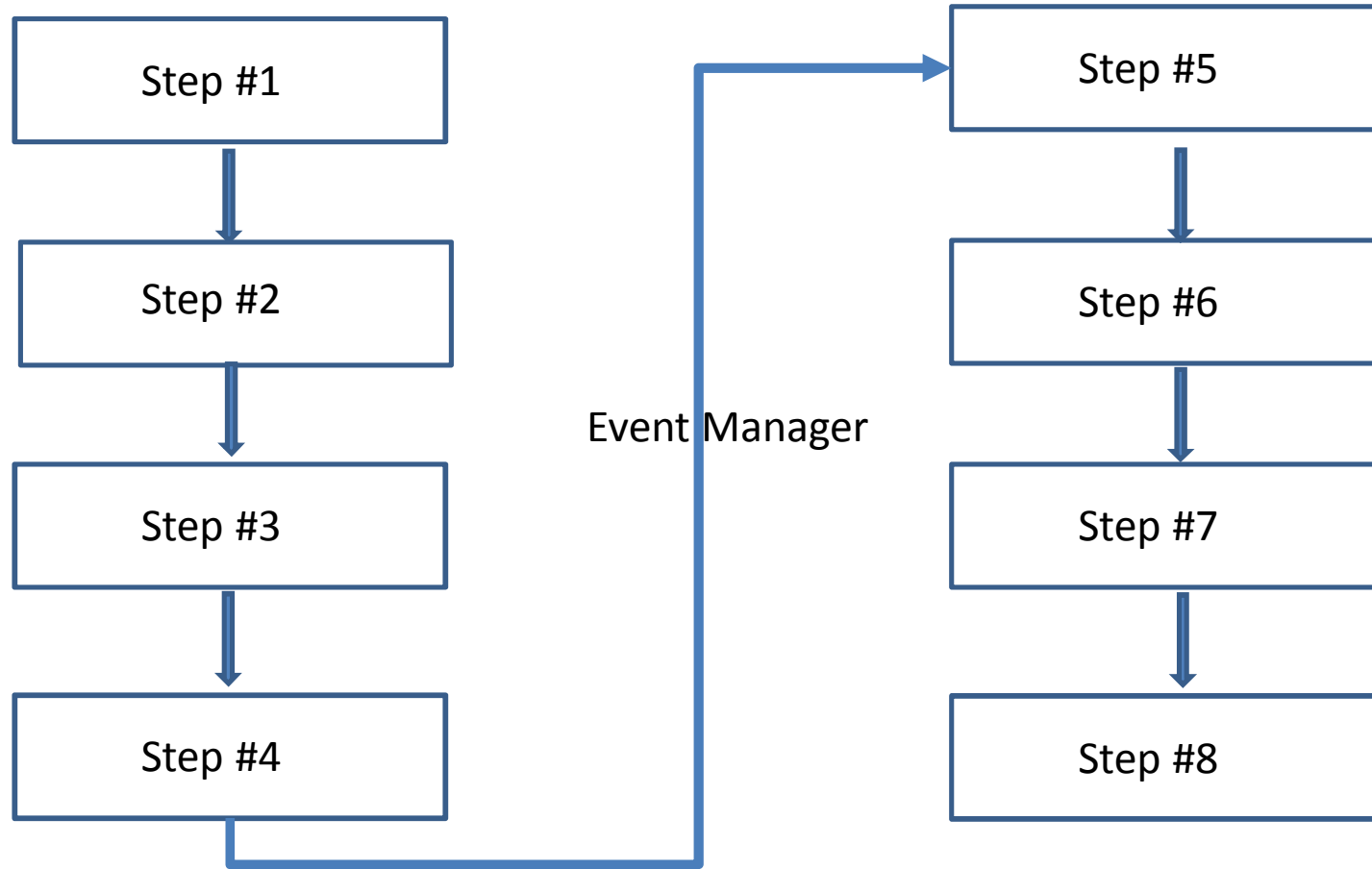
A Workflow Task May be Created by a Resource for Another Resource to Complete, but the Creator Wishes to see the Results of the Task.



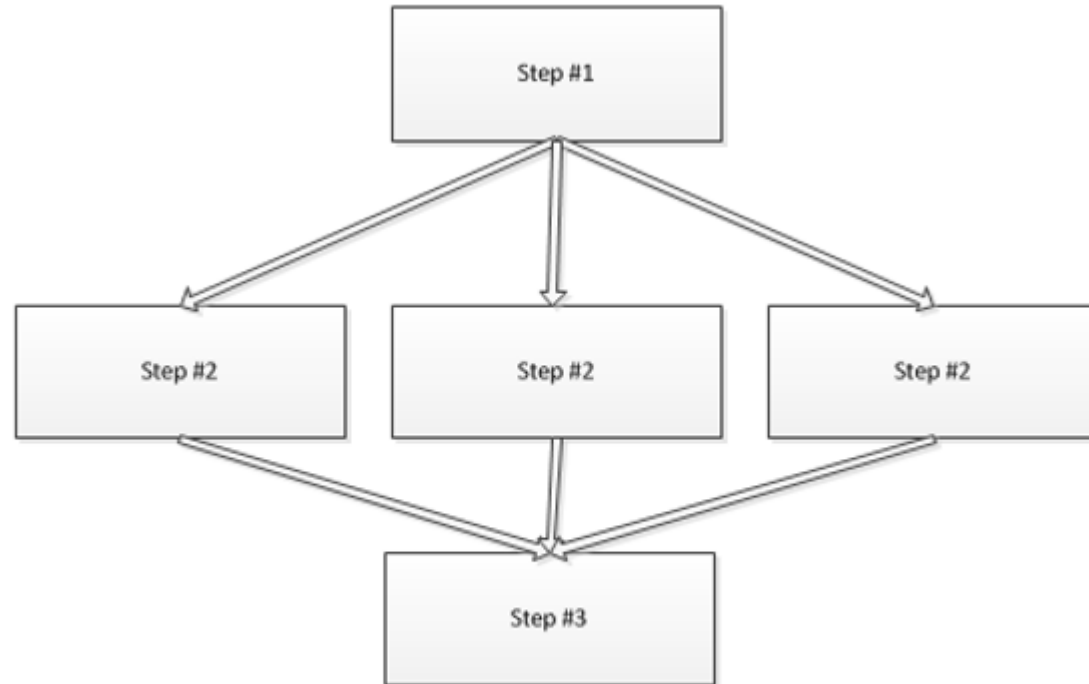
Options with Workflow Requests



Options with Workflow Requests



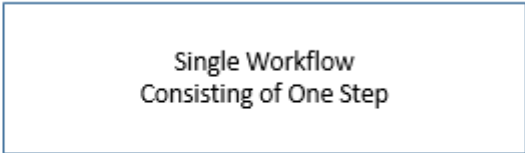
Options with Workflow Requests



Options with Workflow Requests

Workflow - Single Step (Synergy Out-of-the Box)

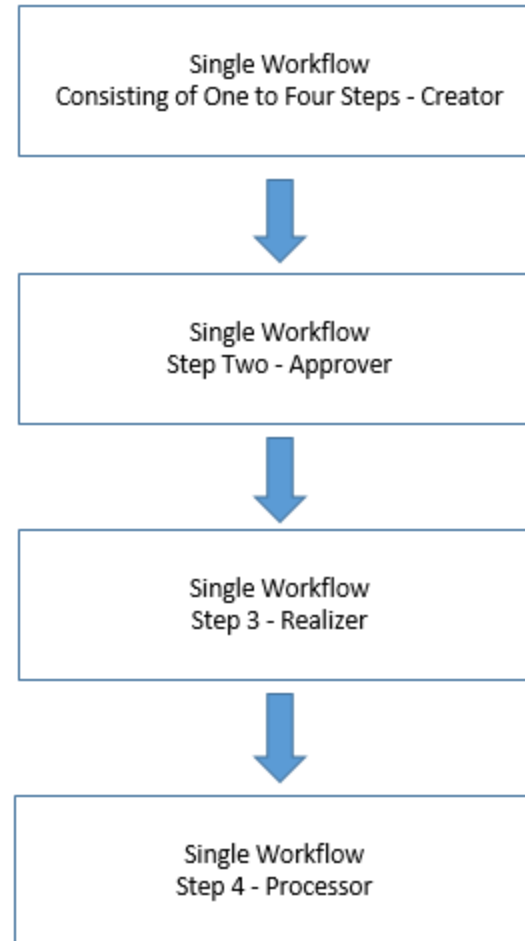
A workflow may have a single step to complete its task.



Single Workflow
Consisting of One Step

Options with Workflow Requests

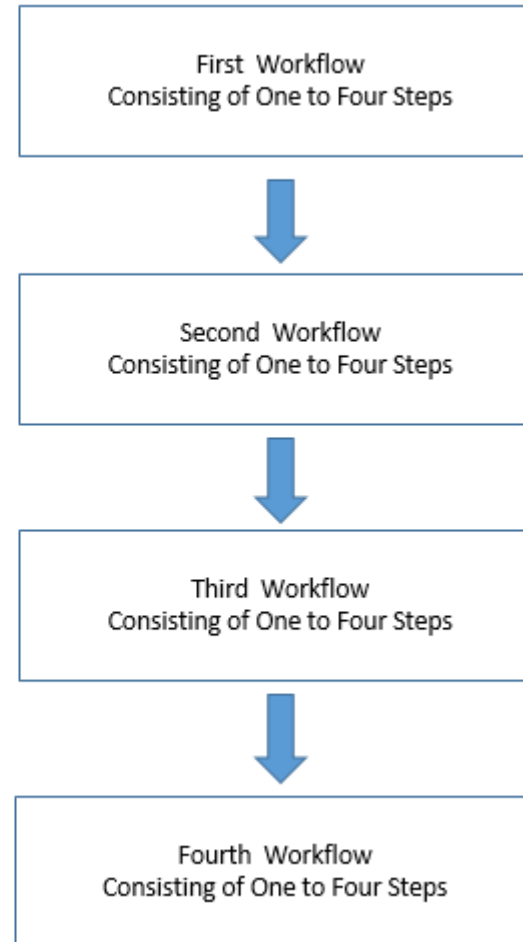
**Workflow - Multiple Steps
(Synergy Out-of-the Box)**
A workflow may have up to four steps to complete its task.



Options with Workflow Requests

Workflow Process Flow (Synergy Out-of-the Box)

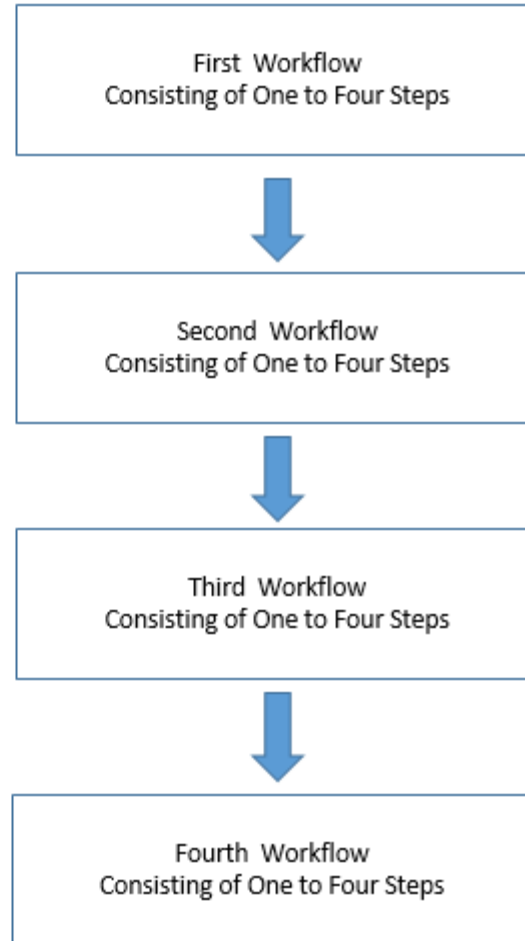
Can Have up to Ten Requests with a Linear flow. When first Request goes to a Predefined Status, the next workflow is created.



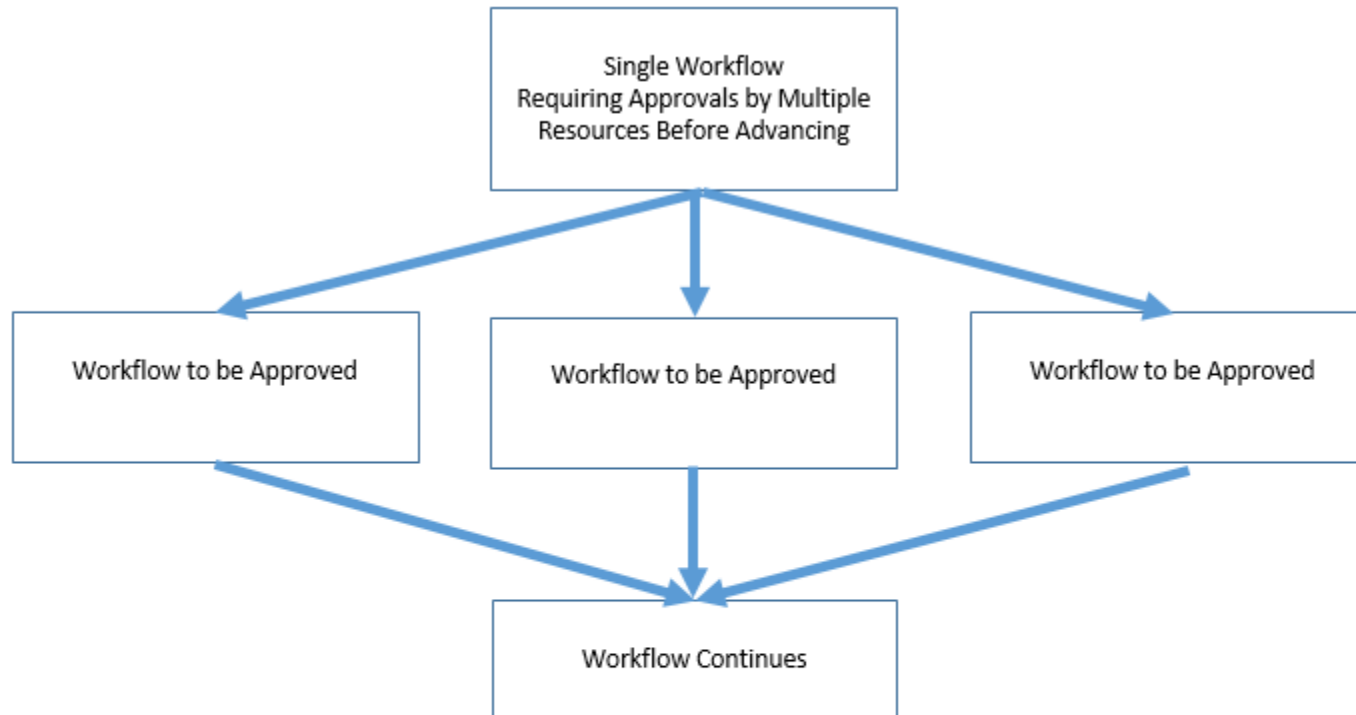
Options with Workflow Requests

Workflow Process (Event Manager)

Can Have an Unlimited Number of Workflow Requests Created. When a Request goes to a Predefined Status or a Rule is Built into the Event Manager Based on Information in the Database, the Next Workflow Request is created. Information from One Workflow Request Can Be Copied to the Next Workflow Request.



Options with Workflow Requests

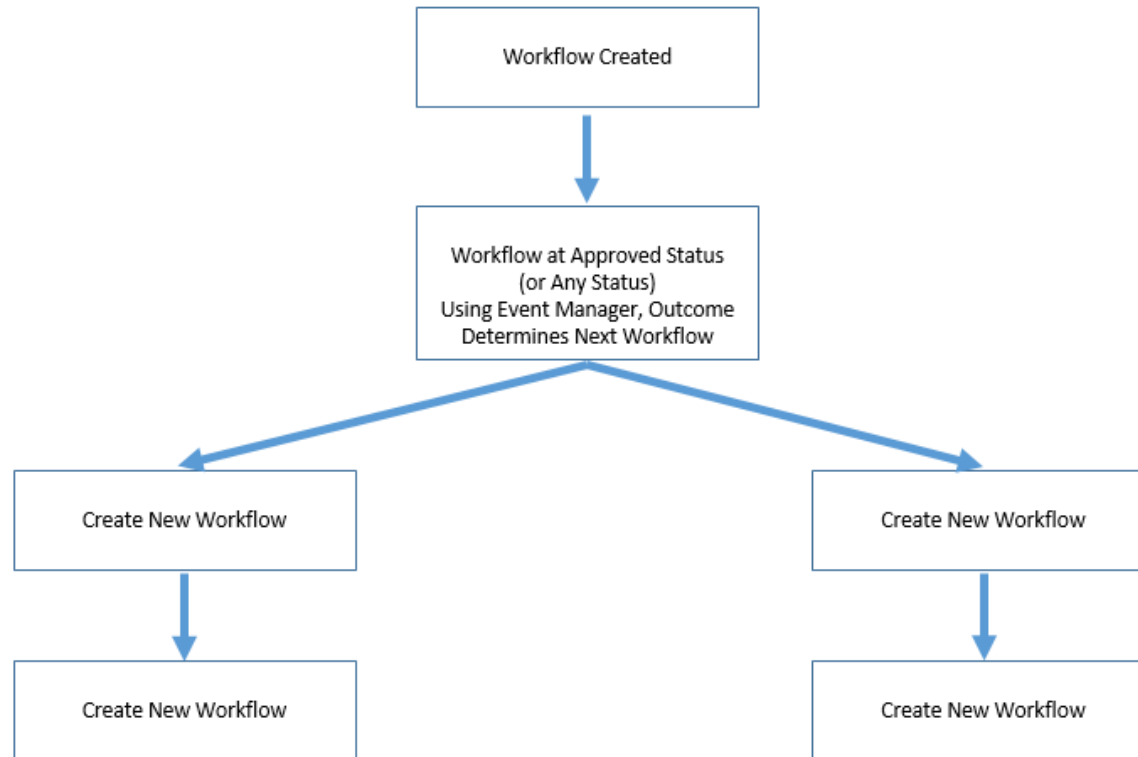


Workflow with Multiple Approvers

(SynergyExpert Customization)

In a Workflow, More than One Approver, Realizer or Processor (every one in a certain Role Group) must agree that it can be moved to its next status before it is completed.

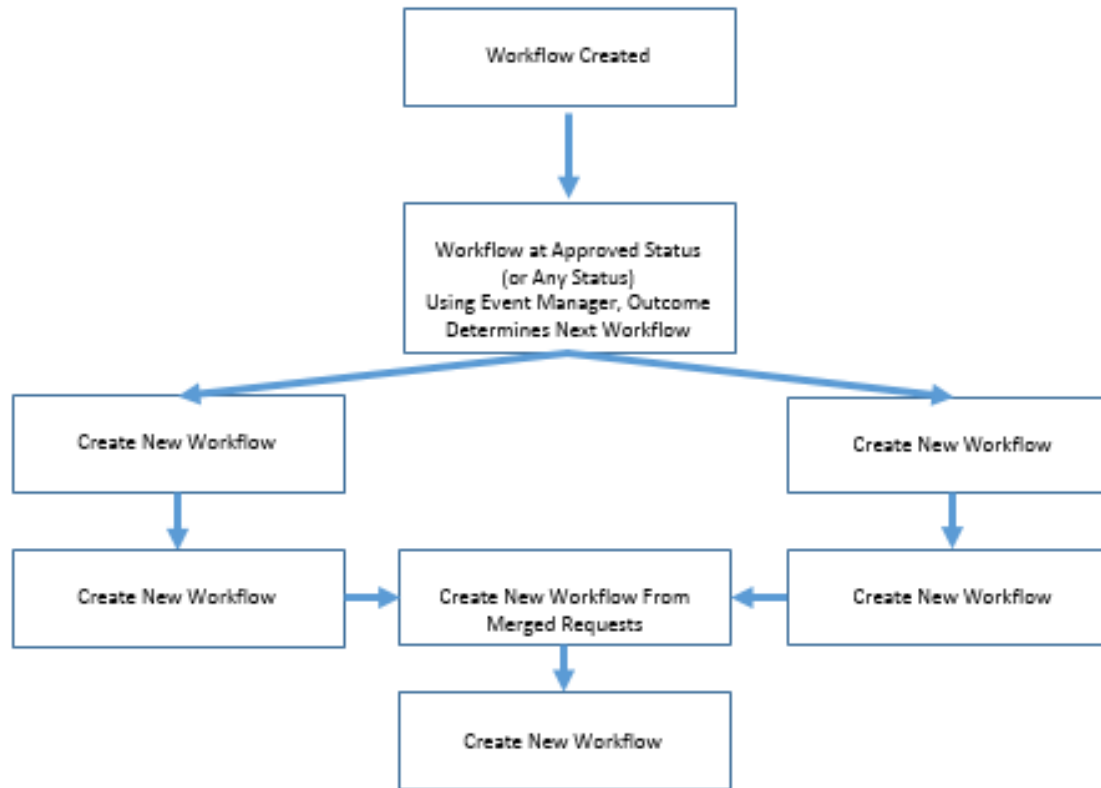
Options with Workflow Requests



Workflow Process – Multiple Paths (Event Manager)

Can Have an Unlimited Number of Workflow Requests Created. When a Request goes to a Predefined Status or a Rule is Built into the Event Manager Based on Information in the Database, the Next Workflow Request is created. Information from One Workflow Request Can Be Copied to the Next Workflow Request.

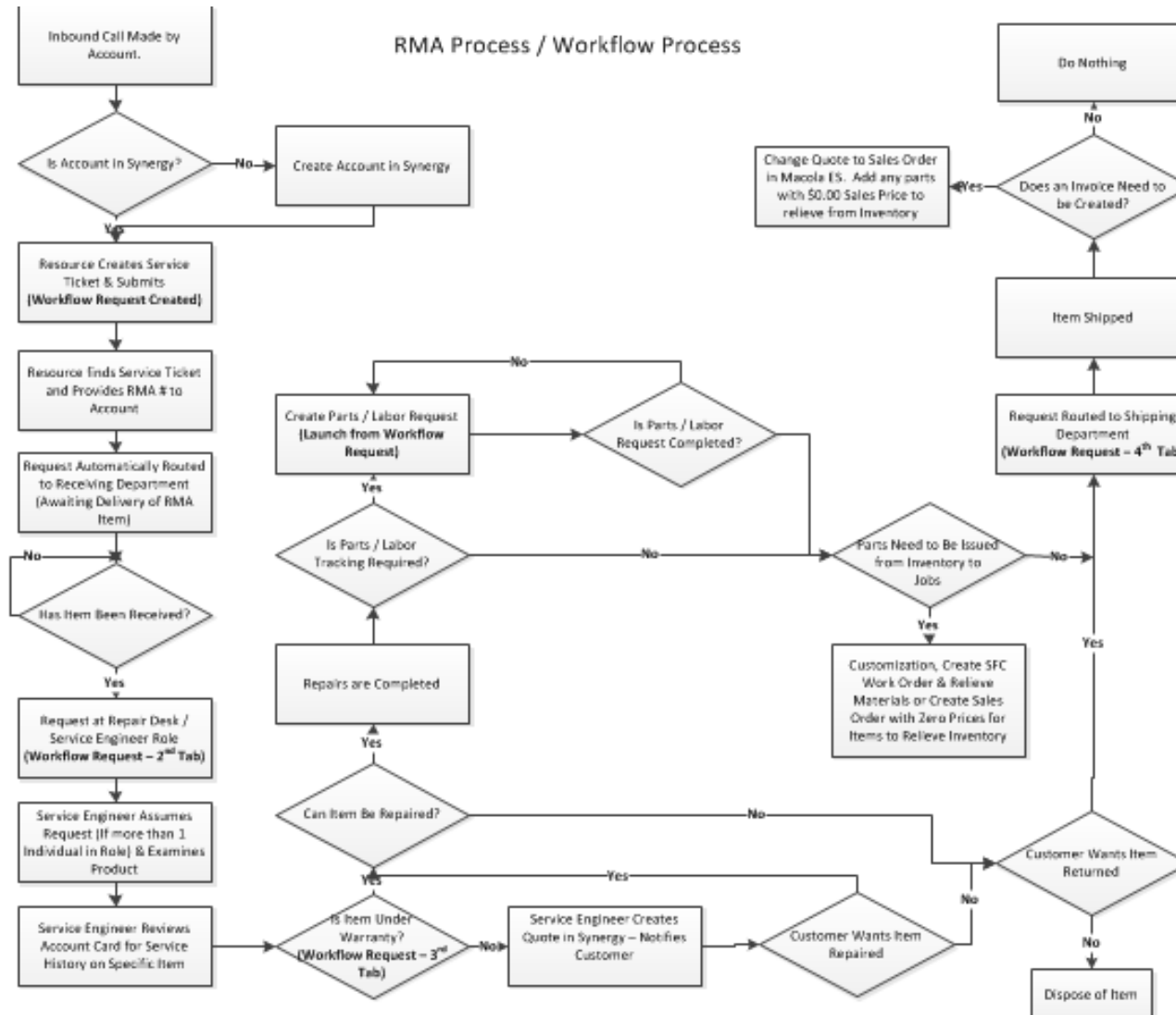
Options with Workflow Requests



Workflow Process – Combine Multiple Paths (Event Manager)

Can Have an Unlimited Number of Workflow Requests Created. When a Request goes to a Predefined Status or a Rule is Built into the Event Manager Based on Information in the Database, the Next Workflow Request is created. Information from One Workflow Request Can Be Copied to the Next Workflow Request. Multiple Paths can be Merged Back to a Single Path. This requires a field such as Related Request that links the Requests together.

Example of a Workflow Process



For More Information or Assistance:

Dave Kloepfer

847-867-4401

dkloepfer@synergyexpert.com

www.synergyexpert.com

SYNERGYEXPERT.COM