

Lines Functionality in Synergy Workflow Requests



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What is Lines ?

What is “Lines” in a Workflow Request?

- ✓ “Lines” is an additional way to enter information into a Workflow Request. It is very beneficial when there may be many fields required for the entry of data that is repeated over and over again.
- ✓ Lines is standard Synergy Functionality, not a 3rd Party Integration

Examples

Use of this functionality include:

- ✓ Expense Reports
- ✓ Quotes
- ✓ Items Used in for Service Work
- ✓ Quality Management Reporting using Fields
- ✓ And Many Others.....

Examples Within this Document

The Screens in this Document are Highlighting the Expense Report Entry of Line Items and Approval Process

Creation of Expense Reports may be Accomplished by 3 Types of Workflow Request, Depending upon Your Requirements

- ✓ Workflow Request
- ✓ Multiple Type Workflow Request
- ✓ Request with Lines Functionality

There are Pluses and Minuses with Each Option. Speak to your Synergy Consultant for advice

Request Without Lines

- ✓ Very quickly, you run out of Free Fields within Synergy Enterprise. Each Entry May take Multiple Free Fields
- ✓ The GLM Workflow Plus Tool can extend the number of fields for you, but again there is a limit
- ✓ Large amount of up and down scrolling the ASPX screen page to enter information

Request Without Lines

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Requests

Jack McBean

+ Create Modules

Expense Report - New

Close Create Edit Draft

Create Approve

Jack McBean
11/09/2017 11:03
Manager: Person

Expense Report Creator: 1 — Jack McBean — Division General Manager — McBean Bike

Expense Report: Expense Report

Week Ending Date: / /

Expense Date: / /

Location: Office

Receipts

Browse...

Total attachments size allowed: 500 MB

Expense Type: Air Fare

\$ Amount:

of Miles:

Account:

Opportunity:

Project:

Time: .25

Notes on Expense Report Topic:

Individual Request for Each Expense Item

Multiple Type Requests

- ✓ From a single workflow request, multiple requests are created
- ✓ These multiple requests are linked together to the parent request
- ✓ Fields available are limited to standard Synergy (and GLM Systems Workflow Plus Free Fields)
- ✓ Difficult to add or delete individual requests

Multiple Type Requests

Expense Report - New

Close Create Edit Draft

Create Approve

Jack McBean 11/15/2017 08:11 Manager: Person

Person 1 Jack McBean — Division General Manager — McBean Bike

Description: Expense Report for Week Ending

Expense Date / /

Attachments Browse...

Free: Text 12

Free: Comment 1

Timestamp Full screen

Expense Amount	Remarks: Request	Item	Item 2	Describe

- Airfare
- Hotel
- Car Rental
- 1 Limo-Cab
- 2 Parking
- 3 Tolls
- 4 Fuel
- 5 Reimbursed Mileage
- Meals
- 4 Phone
- 5 Postage
- Tips
- Seminars
- Internet Services
- Office Supplies

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Expense Report with Lines

- ✓ Allows for Unlimited Quantity of Entries for Expense Types / Amounts and Other Data
- ✓ Tab Key Creates a New Line for Entry of Data
- ✓ Creates only One (1) WorkflowRequest with all of this Information
- ✓ Browsers for Each Entity (Account / Opportunity / Project) can be Standard (out-of-the-box) or Custom Developed

Expense Report with Lines

- ✓ Data is stored in the Absences Table for the Normal Workflow Request Fields
- ✓ Data in the Lines Functionality is stored in an XML Table, linked to the Absences Table
- ✓ Reporting of this Data May be Accomplished by Writing the XML Data to a SQL Table or View

Expense Report with Lines

- ✓ Utilizing GLM Systems's Workflow Plus Free Field Tool, all Requests with Lines functionality will have Views created in the Synergy Database automatically for Reporting and analysis purposes.

Expense Report with Lines

Expense Report - Lines - New

Close Create Edit Draft

Create: Jack McLean 11/19/2017 08:42

Approve: Manager Person

Revoke: Role: Controller, Limit: Division (Person)

Reason: Detailed Expense Report

Remarks Request

Date	Attachment	Extension	Amount	Expense Category	Project	Quantity	Amount
11/19/2017							
11/19/2017							
11/19/2017							

Each Expense Item is in the Same Workflow Request

For More Information:

Contact:

Dave Kloepfer

Sales Manager

dkloepfer@synergyexpert.com

847-867-4401

www.SynergyExpert.com

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