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How to Manage More than 4 Steps in a Workflow Request

I have been often asked how to manage Workflow Processes that involve more than 4 steps. Synergy Enterprise will not allow the creation of more than the four steps.

As I was told the story of Synergy when it was introduced to the North American Marketplace, the limitation of four steps was a direct result of the President of Exact Software stating that "this number of steps is all that should be required within a business process. Four and no more". I cannot verify that this is why we have this limitation, but this story has been told to me by a number of current and former Exact employees.

However there are options that you may use to make this limitation more bearable within your business processes using Synergy.

There are a few ways to assist Synergy Users with this dilemma.

1. **Workflow Process Flows**
   This option allows the use of a maximum amount of 10 separate requests (each with 4 steps - Create / Approve / Realize / Process). They are all linked in a Linear Process (Request #1 - then Request #2 and so on). No logic is allowed that will allow the process to move to a different path if certain criteria is identified.

   I try to use this option as little as possible, due to its limitations on using logic in many of my requests that we build. You cannot easily suspend the path of a workflow Process other than Reject it. In many cases, this is not a viable option.

2. **Workflow Multiple Approver Tool from GLM Systems**
   This particular option allows only four steps in a workflow request. However, unlike

standard Synergy Enterprise functionality that allows "Multiple Approvers. This tool requires that All Resources in a Role must act on the request before it is moved to a new status.

Organizations can create a request with multiple Roles in a single Status. By placing more than 1 Role in the request status or by combining the different Resources for different departments in a single role, multiple actions by two or more departments may be completed in a single status step. The caveat is that the Request will be sent to all Resources in the Role and they can be acted upon without regard to a particular order.

I like this option when Resources can make the status change with a disregard for the particular order that the request must be completed. As an example, when two departments can make a decision on moving a request forward without an approval from the other department in the role, this is an excellent solution.

3. **Creating Rule Engine / Event Manager Tasks with GLM Systems Report in Requests**

   Using this option, you may chain together as many requests as needed with the first request having 4 steps, and additional requests will have three steps. On the second and other additional requests, the first step is always used to create the new request by the Rules Engine or Event Manager - this is the reason for only three additional statuses.

   Once a request has reached the final status change in a request, then a new request linked to the previous request(s) is created by the Rules Engine or Event Manager. Request Fields from one request to another can be copied from the request fields.

   Using the Rules Engine / Event Manager, logic can also be applied to the requests - allowing branches from the main workflow process based upon logic created using fields or data in the SQL database tables.

   You will probably use the Related Request Fields within the Request to link the additional Requests to the first Requests.

   For reporting purposes, customers have been using the GLM Systems Report within Rquests Tool to build SSRS Reports that show the status of these requests, with a Status Changed Date, Status (between all of the Requests in the Planned Process) and Resource affecting the status change. This shows Resources where the Request Process has been completed or is still outstanding.

Tracking Marketing Activities

This question often comes up when I speak with Sales and Marketing Staff: "How do I Track Activities from Marketing Activities that we do, so that I may judge their effectiveness?"

By using a Workflow Request and using this to track all activities, such as:

- Attendees at a webinar

- Marketing e-Mail or Direct Mail Campaigns
- Trade Show Visitor
- Web Site Visitor
- Initial Contact from a Prospect Calling In for Information

I have created a sample Request (Request Type 9141), that you may download and install into your Synergy Test Environment using the Templating Tool.

Download this Request Type (Contact Me and I will send you the XML File)

Download Presentation

Purchase a Tool, Receive a Free Manual

Through the end of this year, for all customers purchasing a new tool from our organization, we will provide a copy of our Manual "Effectively Using the Fields within Requests" at no charge.

This manual has been updated to Version 261, although very few changes have occurred since Version 258.

Download the Table of Contents and a sample page from this manual.

Upcoming Price Increase for January 1, 2019

On January 1st, we will be coming out with a new price sheet. Many of the tools and manuals can expect a price increase between 2% - 4%.

This is the time to purchase Tools and Manuals from us before this price increase occurs. You may review our catalog and current pricing below.

Catalog and Website Links

With over 85 tools in our website (and catalog), we are sure that you can find solutions for many of your desired enhancements with Synergy Enterprise.

If you are interested in any of our tools, please contact us for a demo. Or visit our website and take a look at the presentations for each of our tools.

Catalog
Price Sheet
Website

With all of our tools, we provide installation and training (30 minutes) at no additional costs.

Communications with Synergy Expert

You may inquire about the tools / manuals that we sell by one of three methods:

- Contact myself at dkloepfer@synergyexpert.com
- Call me at 847-867-4401 which is my mobile number
- Call our office at 847-956-6500 and ask for assistance.

We welcome your comments and inquiries.

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