

Sage X3 Workflow Part 1

Mike Shaw — 15th November 2023

Sage



Contents

Introduction

Notifications

Workflow Rules

Demonstrations and review

Summary

Sage

© 2022 The Sage Group plc, or its licensors. All rights reserved.

Page 2

Introduction

- Workflows allow you to specify certain actions to be triggered when certain conditions are met.
- For example, you may wish to trigger a Workflow when:
 - User updates a certain field on a record
 - New record is created or deleted
 - Batch task completes
 - Certain function is launched
 - As part of the flow of a process ([i.e.](#) launch from 4GL code)

Introduction

- The actions you may wish to trigger could include:
 - Send email message to user or group of users
 - Create notification for user(s) to review
 - Update data automatically, or after approval from a user

Probably most often encountered when used for Purchasing approvals ([i.e.](#) approval of Orders, Invoices, Payments, changes to bank details, etc.)

Notifications

Simple version of Workflow Rules, but uses same Workflow engine.

<https://online-help.sageerp3.com/erp/12/staticpost/notifications/>



VS



- Simplified entry
- Triggers emails
- No signature process

- Handles complex rules
- Triggers emails and/or events
- Has a signature process

Review notification ZCUSTOMER1

Workflow code: ZCUSTOMER1 | Description: Customer Payment terms changed | Active

Triggering

Event type: Object

Code: BPC | Description: Customers

Creation ☐ Modification ☒ Deletion ☐ Return ☐ Log ☐

Conditions

Condition	Field	Operation Type	Value
1	ABC Class	Equal to	Class A
2	And	Different	
3	And	Indifferent	
4	And	Indifferent	
5	And	Indifferent	

Expression:

Addresses

Type: User | Email: admin@sage3.local | Function: Managing Director | Send mail: ☒ | Warning: ☒

Type: User | Email: | Function: Managing Director | Send mail: ☐ | Warning: ☐

Message

Object: "Customer "+(BPC01)BPC01N+" modified."

Text: A "Class A" customer has been changed by | GOSER | at | num8(date8) |.

Test the notification by modifying a Class A customer

All > Common data > BPs

Customer

Identity Addresses **Classifications** Controls Financials Ship-to Customer Bank details

Category: SIT, Active, Customer: ZA011, African Computers

Intersite customers

Classifications

Order

ABC Class: Class A, Minimum Order: EUR

☒ Allow order close, ☐ Loan Authorised

Partial Shipment, Price / Amount type

Need to change the Payment terms, for example from CH30NET to CASH:

All > Common data > BPs

Customer

Identity Addresses Classifications Controls **Financials** Ship-to Customer Bank details Contacts

Financials

BPs

Bill-to: ZA011, Address: AD1, Group Customer: ZA011

Pay-by: ZA011, Address: AD1, Accounting code: LOCAL

Factor: →

Taxes

Tax Rule: ZADOM, Exemption Number: , Subject to tax: ☐

Payment

Payment Terms: CASH

Save the change.

Monitoring Workflow notifications

Navigate to Usage, Usage, Workflow Monitor

Select ZTST

Sage X3

All > Usage > Usage

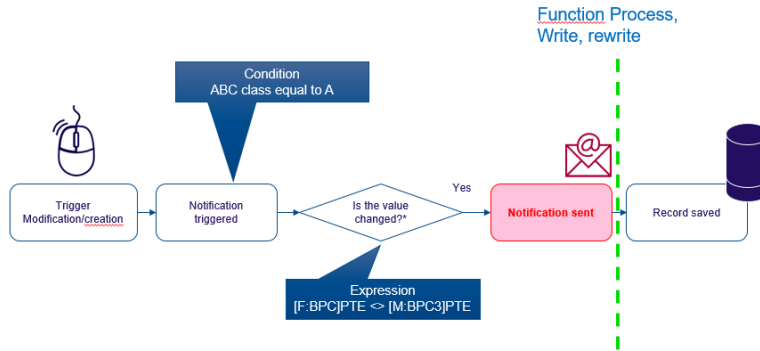
Mike Test (ZTST)

Exceptional delegate: Recipient: Start date: 31/03/23, End date: 31/03/23

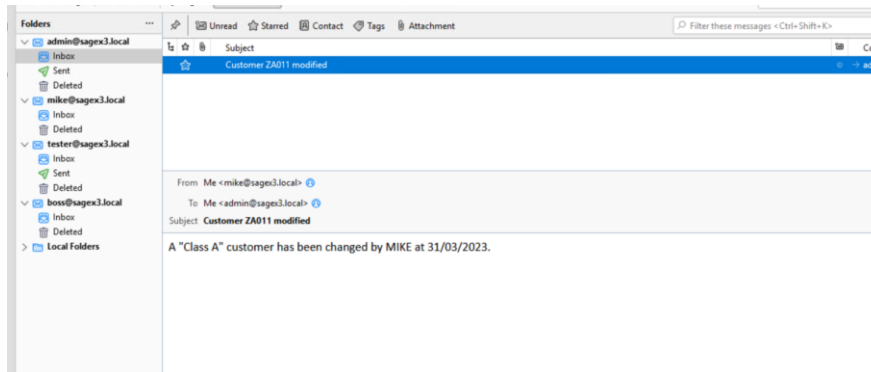
Page 1/1

	Chronological	Recipient	Date	Send mail	Sender	Issue Date	Broad...	Text following	Event type	Event code	Workflow code	Action on	N...	Object	First dest...	Content
1	2300026285	ADMCA	No	Yes	MIKE	31/03/23	13:08:26	Customer ZA011 modified	Object	BPC	ZCUSTOMER1	M	0	BPC	ADMCA	
2																

What just happened?



Check email and will see it has been received.



Before we move away from Workflow Monitor...

Navigate to Parameters, Workflow, Workbench parameters

<https://online-help.sageerpx3.com/erp/12/staticpost/workbench-parameters/>

Review custom notification "ZTST" which we just reviewed and explain we can pick and choose fields, etc. Bit like a transaction entry screen for data entry...

Can check the same data through SSMS

```

select *
from SEED.AWRKHISSUI
where CREDATTIM_0 >= DATEADD(day, -1, CURRENT_TIMESTAMP)
order by CREDATTIM_0 desc

```

'Domain'	Table	Description	Abbr.	Notes
Settings	AWRKLKLNK	Data models	AWM	Data models header (GESAWM)
Settings	AWRKPAR	Workflow rules	AWA	Workflow rules header, conditions (GESAWA)
Settings	AWRKPARC	Workflow rules (actions)	AWC	Workflow rules' actions (GESAWA)
Settings	AWRKPARF	Workflow rules (signature)	AWF	Workflow rules' milestone text/signature (GESAWA)
Settings	AWRKPARH	Workflow rules (recipient)	AWF	Workflow rules' recipients (first and second) (GESAWA)
Settings	AWRKPARX	Simplified workflow	AWX	Notification (GESAWX)
Settings	AWRKREG	Assignment rules	AWR	User rules of assignment (GESAWR)
Settings	AWRKREGVAL	User assignment	AWV	User assignment (GESAWV)
Settings	AWRKTAB	Data models (lines)	AWK	Data models lines (GESAWM)
Settings	AWRKTRN	Workflow workbench	AWW	Workbench parameters (GESAWW)
Settings	AWRKTRND	Workflow workbench (sections)	AWD	Workbench parameters' sections (GESAWW)
Settings	AWRKUSR	User delegates	AWU	User delegates (GESAWU)
Workflow	AWRKHISSDES	Workflow history	AWO	
Workflow	AWRKHISSJOI	Workflow history	AWJ	
Workflow	AWRKHISSUI	Workflow tracking archive	AWS	Workflow tracking archives (extracted from SAIWRKPLN)

A small improvement on the above SQL, to include the message itself:

```
select N.CHRONO_0, N.EMETTEUR_0, N.CODWRK_0, N.DEST_0, N.DATENV_0, N.TIMENV_0,
N.TEXSUI_0, M.TEXTE_0
from SEED.AWRKHISSUI as N
      full outer join SEED.AWRKHISMES as M on N.CHRONO_0 = M.CHRONO_0
where N.CREDATTIM_0 >= DATEADD(day, -10, CURRENT_TIMESTAMP)
order by N.CREDATTIM_0 desc
```

Could consider using or creating a requester with similar SQL to put on users landing pages. There is a standard Graphical Requester “ZWRKHIS” you could use as a starting point.

The screenshot shows the 'Historique suivi Workflow' (Workflow History) interface in Sage X3. It displays a table of workflow events with columns: Emetteur, Date émission, Heure émission, Texte suivi, and Destinataire. The table lists 14 events, mostly related to company identification data modifications and sales orders.

	Emetteur	Date émission	Heure émission	Texte suivi	Destinataire
1	ADMCA	27/03/22	193703	Modification of the company identification data DE10	ADMIN
2	ADMCA	27/03/22	193714	Modification of the company identification data ES20	ADMIN
3	ADMIN	14/03/22	121427	Modification des données d'identification de la société NA20	ADMIN
4	ADMIN	15/01/23	144942	Modification des données d'identification de la société FR10	ADMIN
5	ADMIN	15/01/23	144952	Modification des données d'identification de la société FR20	ADMIN
6	ADMIN	15/01/23	150143	Modification des données d'identification de la société FR20	ADMIN
7	ADMIN	15/01/23	150149	Modification des données d'identification de la société FR10	ADMIN
8	ADMIN	15/01/23	154710	Modification des données d'identification de la société FR10	ADMIN
9	ADMIN	15/01/23	154716	Modification des données d'identification de la société FR20	ADMIN
10	ADMIN	27/01/22	180054	Modification des données d'identification de la société BE20	ADMIN
11	ADMIN	29/10/22	164813	COMMANDE DE VENTE : SONPT0320027 A SIGNER	ADMIN
12	ADMIN	29/10/22	164813	COMMANDE DE VENTE : SONPT0320027 SANS CIRCUIT DE SIGNATURE	ADMIN
13	ERFPR	18/10/22	170709	COMMANDE D'ACHAT : POF0210022 SANS CIRCUIT DE SIGNATURE	ADMIN
14	POFPR	18/10/22	170820	COMMANDE D'ACHAT : POF0210022 SANS CIRCUIT DE SIGNATURE	ADMIN

Or... I created my own ZWRK request and attached to ZWFmonitor menu item. This can be added to home page if needed.

Review ZWRK requester (Parameters, Usage, Printouts, Query tool) Execute to show results.

Review ZWFmonitor menu item (Administration, Authoring, Pages, Menu items) This can be added to the home page if you want...

Also review the Purchase and Sales workflow home pages

Workflow Rules

<https://online-help.sageerpx3.com/erp/12/staticpost/workflow-rules/>

Now we will “convert” our notification to a Workflow Rule. This means we can use the full facilities the Workflow Engine provides!

You can of course create all your workflows directly in Workflow Rules.

Navigate to Parameters, Workflow, Workflow Rules

Query back “ZCUSTOMER1”

Change anything and save. (Note the warning message)

Review the workflow rule sections/fields, noting differences:

Parameters > Workflow

Workflow rules

Validation

Copy

General

Recipient

Message

Milestone

Action

Code *

ZCUSTOMER1

Description

Customer Payment terms changed

Category

→

Active

General

Triggering event

Event type

Object

Event code

BPC

Operations

M

End of transaction

Data model

→

Assignment rules

Workflow type

Header

Table line

Regrouping lines

Conditions

1

Header

[F:BPC]ABCLLS=1 & [F:BPC]PTE<=>[M:BPC]PTE

2

Controls

Trigger mail

Trigger action

Trigger tracking

Debug mode

Use a theme

Recipient

Recipients

Condition

Type

Recipients

Function

Send mail

Milestone

Types

Delegate option

1

User

"BOSS"

Yes

Yes

No

2

Message

Message

Sender e-mail

Object

"Customer " + [M:BPC]BPCID + " modified"

Text

Choose heading

B

I

U

S

≡

≡

≡

≡

≡

↶

↷

📎

A "Class A" customer has been changed by | USER | at | num(date) |.

Table | [F:BPC]PTE | screen | [M:BPC]PTE |

Controls

Line

Controls

Sending

Any

Server

Client

Return icon

Return function

Link key

Desktop

Link key

Mobile phone

Link key

Modifiable Message

Grouping by recipient

Request read receipt

Attachments

Linked trace file

Attached document

Enclosure

All types

Type of attachment

All categories

Category

Milestone

Text

Text following

"Customer " + [M:BPC]BPCID + " modified"

Signed

Signed

More conditions, more controls, more recipients/more options, signatures, context, etc...

Category: (optional) grouping, can add your own codes to the list

Event types, operations: more options available

End of transaction: trigger before data is saved (can access screen and table data) or if checked after data is saved to tables (table data only).

Update "Conditions" to add "[M:BPC3]PTE" [F:BPC]ABCCLS=1 & [F:BPC]PTE<>[M:BPC3]PTE

Changed recipients to be "BOSS"

Add "Debug mode"

Add Message text : Table | [F:BPC]PTE | screen | [M:BPC3]PTE | .

Save and validate

Test results by making change to customer and will now see "debug" message

Check the email.

NOTE: the table ([F:BPC]PTE) is a different value to the screen ([M:BPC3]PTE) at the point the WF is triggered.

NOTE: I'll disable this workflow rule now, so it doesn't interfere in my later demos.

How to create an alert if a specific user is currently logged in?

<https://www.sagecity.com/gb/sage-x3/b/sage-x3-uk-support-insights/posts/how-to-check-if-a-specific-user-is-currently-logged-in>

A customer has setup their instance such that the default ADMIN user is not to be used routinely (which is great and considered best-practise) but did not want to disable the ADMIN user completely. They do however want to get an alert whenever the ADMIN user logs in, to ensure no-one is using it for any reason.

There are various possible ways to achieve this, but the obvious choice within X3 would be to use a Workflow rule...

The first port of call was to look at the provided “LOGON” workflow rule. This does work OK, but during testing this option found a few issues which made it not entirely satisfactory:

- Workflow rules run in the context of a folder, so needs to be setup for every folder.
- The rule is not triggered when the user logs in to X3 and sits on the home page, but only when the user launches then exits a classic function.
- On the customer system there were a lot of alerts generated which did not seem to be due to interactive users (It is still not clear why this is happening at the time of writing)

Review LOGON workflow rule

Point out it uses Event Code “CON” which is documented in online help...

The next option is to see if it is possible to setup a custom workflow rule to do a better job. I have documented below a proof-of-concept that I think fits the bill for the customer requirements outlined above. For my testing I setup a workflow rule to trigger when the user TESTER is logged in. The concept is to use the X3.ASYSSMINTERN as the trigger, as this table stores all connected user details as soon as they login – with the record being deleted when they logout. To do this I need to use a Manual Workflow which needs to be scheduled to run via the batch server as a Recurring task.

NOTE: this demonstrates the need to have good knowledge of the data model and the way X3 works.

Review Data Model

<https://online-help.sageerpx3.com/erp/12/staticpost/data-models/>

Although I am connected to SEED folder, I can pick the ASYSSMINTERN from X3 folder

The screenshot shows the 'Data models' configuration interface in Sage ERP X3. The 'ZWFUSR' template is selected and highlighted with a yellow box. The 'Description' field contains 'Workflow user login' and the 'Active' checkbox is checked. Under 'Characteristics', the 'Activity code' is 'ZWF' and the 'Module' is 'Supervisor'. The 'Properties' section shows 'Setup templates' is unchecked, 'Workflow' is checked, and 'Deliverable definition' is unchecked. The 'Links' section shows the 'Main table' as 'ASYSSMINTERN'. Below this is a table with columns: 'Linked table', 'Abbrev.', 'Origin table', 'Abbrev.', 'Key', 'Type', 'Link expression', and 'Selection expression'. The 'Miscellaneous' section includes 'Company field' and 'Site field' dropdowns. At the bottom, the 'Setup templates' section shows the 'Legislation field'.

Review workflow rule

<https://online-help.sageerpx3.com/erp/12/staticpost/workflow-rules/>

I decided to go a little way past the absolute simplest, as thought it would be good to pick up some fields from the ASYSSMINTERN table in the alert email. If you want the absolute simplest option, you can remove the Trigger tracking and milestone setup.

Review the pre-created ZWFUSR workflow rule.

We will also discuss the options in a little more detail as we go through.

- Set the Workflow to be Active
- Point out “Manual”
- Discuss “Context” and that it’s stored in WF table. The “CTX(x)” can be used in messages, etc. with CTX(1) being the first line in the context grid.

Note: you will get a separate email for every Adonix session the user has open at the time the workflow is triggered, e.g. if the user logs in and launches a classic function, you will get two separate emails. You could use the Regrouping option if you only want one email.

Test the workflow

Login as user TESTER, launch a classic function and check there are two records in the X3.ASYSSMINTERN table.

```

-- sql: X3-ASYSMINTERN (55) --
/*
select *
from SEED.AWRKHISSUI
where CREDATTIM_0 >= DATEADD(day, -1, CURRENT_TIMESTAMP)
order by CREDATTIM_0 desc
*/

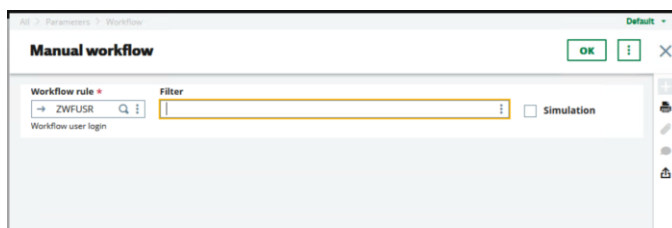
/*
select *
from X3-ASYSMINTERN
*/

select N.CHRONO_0, N.EMETTEUR_0, N.CODWRK_0, N.DEST_0, N.DATENV_0, N.TIMENV_0, N.TEXSUI_0, M.TEXTE_0, VALCTX1_0, VALCTX2_0, VALCTX3_0, VALCTX4_0, VALCTX5_0
from SEED.AWRKHISSUI as N
full outer join SEED.AWRKHISMES as M on N.CHRONO_0 = M.CHRONO_0
where N.CREDATTIM_0 >= DATEADD(day, -1, CURRENT_TIMESTAMP)
order by N.CREDATTIM_0 desc
*/

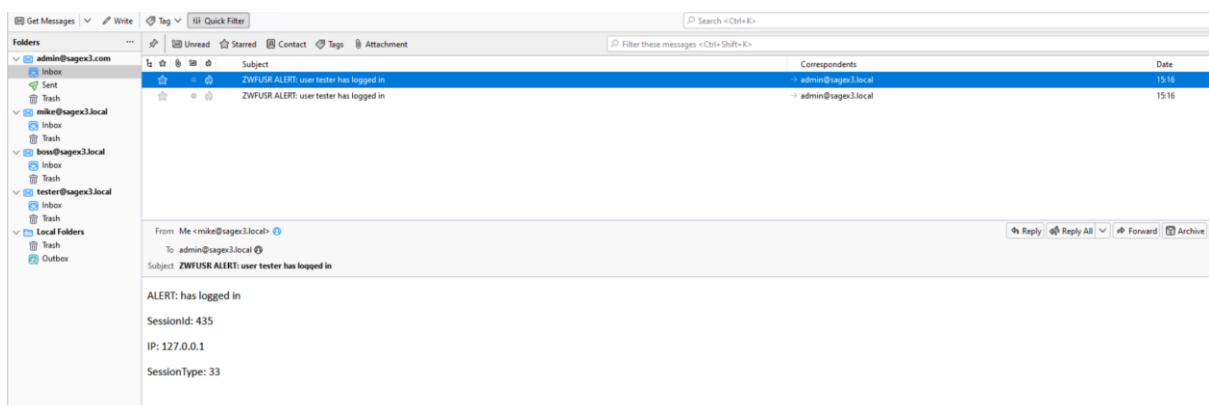
```

UPDTCK_0	SESSION_0	FOLD_0	LAN_0	SOLUTION_0	SESSIONTYPE_0	REMOTE_0	PEER_0	SYSTEMUSER_0	NATURE_0	ALOGIN_0	PROCESSAD_0	CREDATTIM_0
1	0	401	X3	ENG	35	X3RPV125GLVM acwrest-1 compute internal	X3un	admin	1	801	857	2023-07-31 07:23:14.00
2	0	404	SEED	ENG	25	X3RPV125GLVM acwrest-1 compute internal	127.0.0.1	X3un	1	857	857	2023-07-31 14:15:04.00
3	0	431	SEED	ENG	20	X3RPV125GLVM acwrest-1 compute internal	X3un	admin	1	851	851	2023-07-31 13:57:45.00
4	0	402	SEED	ENG	35	X3RPV125GLVM acwrest-1 compute internal	X3un	mike	803	853	853	2023-07-31 07:23:27.00
5	0	429	SEED	ENG	33	X3RPV125GLVM acwrest-1 compute internal	1	X3un	1	857	857	2023-07-31 13:44:13.00
6	0	433	SEED	ENG	33	X3RPV125GLVM acwrest-1 compute internal	127.0.0.1	X3un	1	855	855	2023-07-31 14:14:58.00
7	0	430	SEED	ENG	25	X3RPV125GLVM acwrest-1 compute internal	1	X3un	1	859	859	2023-07-31 13:44:17.00

Run the workflow manually to test (or wait one minute for the Batch Server to run it!)



Check an email(s) is generated as expected.



As we can see, I have two emails – this is because in my test I launched a classic function so have two entries in the X3.ASYSSMINTERN table.

Check the Workflow history table.

Can use the SQL below:

```

select N.CHRONO_0, N.EMETTEUR_0, N.CODWRK_0, N.DEST_0, N.DATENV_0, N.TIMENV_0,
N.TEXSUI_0, M.TEXTE_0, VALCTX1_0, VALCTX2_0, VALCTX3_0
from SEED.AWRKHISSUI as N
full outer join SEED.AWRKHISMES as M on N.CHRONO_0 = M.CHRONO_0
order by N.CREDATTIM_0 desc

```

```

select N.CHRONO_0, N.EMETTEUR_0, N.CODWRK_0, N.DEST_0, N.DATENV_0, N.TIMENV_0, N.TEXSUI_0, M.TEXTE_0, VALCTX1_0, VALCTX2_0, VALCTX3_0
from SEED.AWRKHISSUI as N
full outer join SEED.AWRKHISMES as M on N.CHRONO_0 = M.CHRONO_0
order by N.CREDATTIM_0 desc

```

CHRONO_0	EMETTEUR_0	CODWRK_0	DEST_0	DATENV_0	TIMENV_0	TEXSUI_0	TEXTE_0	VALCTX1_0	VALCTX2_0	VALCTX3_0
2300026234	ADMIN	ZWFUSR	ADMIN	2023-03-23 00:00:00.000	163406	ZWFUSR ALERT: user mike has logged in	ALERT: mike has logged in SessionId: 5853 IP: 10.1.46.250 SessionType: 33	5853	10.1.46.250	33
2300026235	ADMIN	ZWFUSR	ADMIN	2023-03-23 00:00:00.000	163406	ZWFUSR ALERT: user mike has logged in	ALERT: mike has logged in SessionId: 5854 IP: 10.1.46.250 SessionType: 25	5854	10.1.46.250	25

Additional thoughts

There are additional steps that could be taken to refine and improve this process, such as setting up assignment rules for who gets notified, adding other tables to the data model to get more useful data in the notification email and maybe even use the signature mechanism to allow the administrator to reply and kill the session immediately.

I hope these steps have given you one basic approach to generate an alert whenever a particular user logs in to your X3 system.

Conclusion

I hope this session has given you the basics of how Workflow works and how it can be used within the Sage X3 environment.