

Workflow on Operating budget

Workflow notifications allow emails to be sent based on certain criteria that are met in the system. You can create workflow rules that trigger an event using the Workflow rules function. The recipients of the workflow notifications can be set up directly in the rule, either through a user code or through a business partner code and a contact type at the business partner.

Workflow messages or logs are generated depending on the context, on the workflow parameters, and on the user activity if they are compatible with all MAPI / mail messaging applications on the client workstation, and with all SMTP POP3 applications on the server.

- Workflow messages or logs can be sent from the client workstation or from the server.

o Client workstation: Needs the local MAPI client (Outlook for example) to be launched.

Before submitting an envelope for approval, you need to ensure that the workflow is set up.

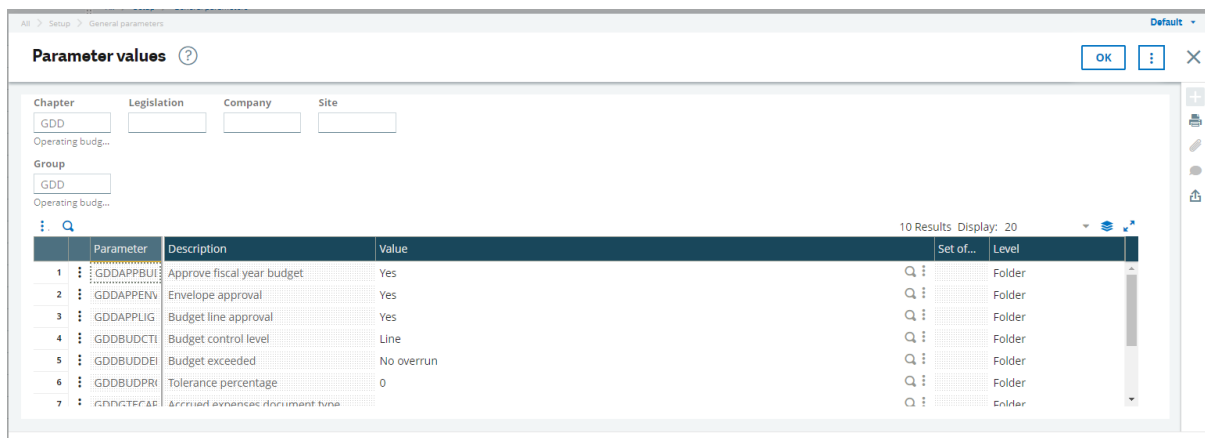
Follow the link below for the operating budgets setup.

<https://www.sagecity.com/za/sage-x3-south-africa/f/enterprise-management-formerly-sage-x3-south-africa-announcements-news-and-alerts/153059/operating-budget>

Resolution:

The following setup also needs to be completed:

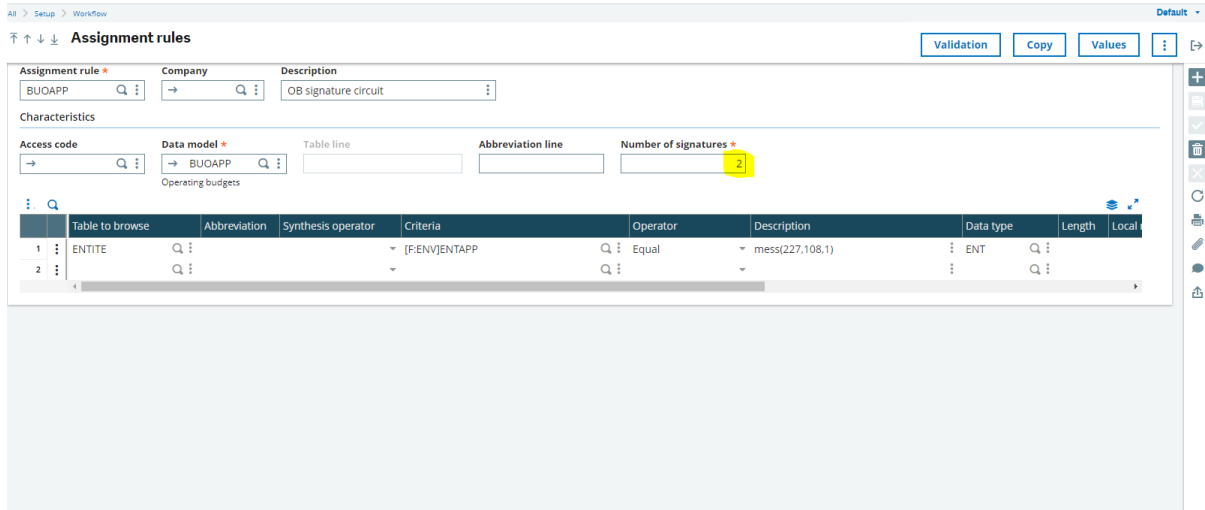
Setup> General parameters> Parameter Values> GDD Chapter> GDD



Complete the workflow setup:

Setup> Workflow> User rules of assignment> BUOAPP

Change the number of signatures to the number of users who will be approving.



Save and validate.

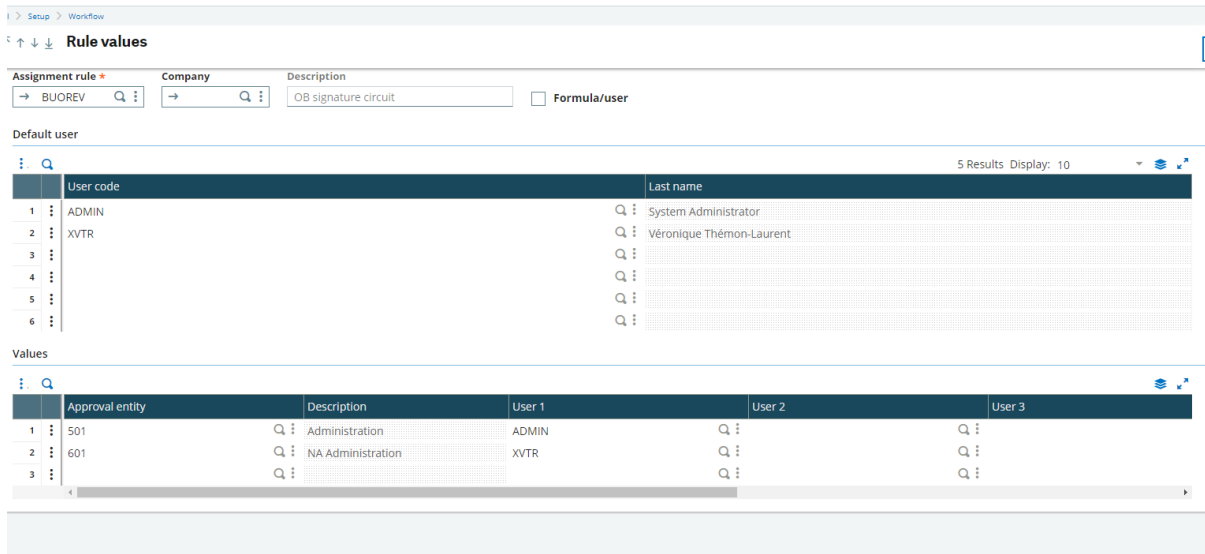
Navigate to:

Setup> Workflow> User rules of assignment> BUOAPP

If BUOAPP on the list, you will need to create it.

Add your approval entity's as per your entity setup and the users

Add also add the default users



You can now submit the envelope for approval.

To create an envelope, navigate to:

Operating Budgets> Budget management> Budget envelope.

Operating budgets > Budget management

Budget envelopes

Envelope Miscellaneous

Budget type * Budget code * Currency

TEST DISC ZAR

Envelope ENVP-22-00004 Description Test4 Short description test

Envelope

Accessibility

Project PBO-22-00000001 Company/Site * ZA10 Description South African Compan Access code

Organization

Responsible entity * Approval entity Reporting entity

ZA10 ZA10

Completion date from/to *

01/01/22 12/31/22

Off-budget Renewable

Overflow control 0.00 %

History

Envelope status Entered Approval date Latest review date

To submit for approval, navigate to:

Operating Budgets> Approval Management> Submit for Approval.

Enter the company, date and refresh to display

Click on the Subject to, to include the envelop for approval.

Operating budgets > Approval management

Submit for approval

Company/site * Description ZA10 South African C

Criteria

Start date End date 01/01/22 12/31/22

Project

Responsible entity from Responsible entity to Approval entity from

Approval entity to Envelope from Envelope to

Display/Refresh Check/Uncheck all

Details

	Level	Amount	C...	Subject to	Envelope	Description	Fiscal year	Project	Responsible entity	Recipient enti
1	Budget	20,000.00	ZAR	<input checked="" type="checkbox"/>	ENVP-21-00002	TEST OPB	3 -		ZA10	ZA10
2	Fiscal y	2,500,000.00	ZAR	<input checked="" type="checkbox"/>	ENVP-22-00003	TEST3	3 -		ZA10	
3	Envelop	5,000,000.00	ZAR	<input checked="" type="checkbox"/>	ENVP-22-00004	Test4		PBO-22-00000001	ZA10	

To approve the workflow, navigate to:

Usage> Usage> Workflow monitor> ALL

The envelope should automatically appear once without having to input dates

To be signed Late To be read

Exception delegate Recipient Start date End date

To be signed

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Sequence no.	Recipient	Issue date	Issue time	Signature leadtime	Tracked text	Signature flag
1	ADMIN	08/16/22	08:58:25	08/16/22	Approval request APP-2208-009 ; Envelope: ENVP-22-00004 TES	To be signed
2	ADMIN	08/16/22	08:58:25	08/16/22	Approval request APP-2208-008 ; Envelope: ENVP-22-00003 TES	To be signed
3	ADMIN	08/16/22	08:58:25	08/16/22	Approval request APP-2208-007 ; Envelope: ENVP-21-00002 TES	To be signed

Late

Click on the action button and select signature

Select Validation.

Once validated the second user will appear on the list for validation

Standard complete (ALL)

To be signed Late To be read

To be signed

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Sequence no.	Recipient	Issue date	Issue time	Signature leadtime	Tracked text	Signature flag
1	USRO6	08/16/22	09:04:34	08/16/22	Approval request APP-2208-009 ; Previous signer: ADMIN	To be signed
2	ADMIN	08/16/22	08:58:25	08/16/22	Approval request APP-2208-008 ; Envelope: ENVP-22-00003 TES	Signed
3	ADMIN	08/16/22	08:58:25	08/16/22	Approval request APP-2208-007 ; Envelope: ENVP-21-00002 TES	To be signed

Late