Spotlight – Workflow Manager

Preparation for Spotlight

Preparating the demo data:

1. Take the latest Standard ERP version

2. Import UK Demo backup (find the file attached)

3. Log in:
   User: sample@hansaworld.com
   Password: Sample99

4. A pop-up window of Task Manager will appear. Open the first activity (task) from the Task Manager window (Please Approve PO 21100015…)

5. Open linked purchase order No.21100015

6. Open workflow manager and change the End Date of the first activity (Call supplier …) to present date

SCRIPT:

Through Workflow Manager, Standard ERP offers an overview of activities related to each record in the system. Let's take a look at Workflow Manager on a Purchase Order.

> ACTION: Log in as sample@hansaworld.com. A pop-up window of Task Manager will appear.
> Open the first activity (task) from the pop-up window. (Please Approve PO 21100015…)
> Then open linked purchase order No.21100015.

Workflow Manager provides an overview of all related activities with a color-coded status indicator; a "heartbeat" symbol.

Here, - you'll see the highlighted "heartbeat" symbol indicating there are tasks associated with this Purchase Order.

> ACTION: Open it by clicking "heartbeat" symbol

Green indicates today's tasks; blank for future tasks; checkmark for completed tasks, and red for overdue activities.

> ACTION: Open top red activity. Click on 'Approve' button. Close the activity.

When I approve this Purchase Order, the indicator in Workflow Manager changes accordingly.

Standard ERP's Workflow Manager provides an instant overview of related activities - an overview helping you manage daily business more efficiently.