5.1.3 Defining Workflows

Defining a workflow refers to the process of creating a sequence of tasks and activities that are executed automatically based on specific business rules and conditions. It involves designing the workflow, assigning agents or roles to tasks, and defining the flow of information between different steps.

In this article, we'll define a workflow by assigning an agent to the task created in the previous article. Refer to the <u>Standard workflow creation</u> process before defining the workflow.

Defining a workflow

1. On the Workflow Builder screen, click **Agent Assignment** in the Task Properties group box. This action directs to the **Standard task: Maintain Agent Assignment** screen, as shown below.



2. Select **Change Purchase orders** and click the **Create agent assignment** icon, prompting a popup to choose the agent type.

Page 1 / 5 (c) 2024 Liquid UI | Synactive | GuiXT <dev@guixt.com> | 2024-07-31 16:40 URL: https://www.guixt.com/knowledge_base/content/85/977/en/513-defining-workflows.html



3. Choose the object type as **Position** and proceed.

Er Agent assignment Edit	<u>G</u> oto System <u>H</u> elp					_ 🗆 X
	« 🗏 🛯 🖓 🤬 🖶 H	M กากกา				
Standard task: Main	tain Acent Accienmen	•				
Attributes	🔁 🗄 👔 Org. assignme	ent 😌 🛃				
Name	ID General	or Background Task	Task Version	Assigned as of	Assigned until	
Change purchase orders (Secretary Purchase	s 50002664			03.02.2017	Unlimited	
	Er Choose agent type	×				
	Icon Object type					
	Work Center					
	Role					
	Organizational u	nit				
	Position					
	Task					
	L <u>s</u> User					
		13				
()						
			Sec. 1		≫ TRX (1) 800 ∨ juneau	u OVR 🖉 🧟 🖌 🖌

4. Select the desired position and click **continue**.

Page 2 / 5 (c) 2024 Liquid UI | Synactive | GuiXT <dev@guixt.com> | 2024-07-31 16:40 URL: https://www.guixt.com/knowledge_base/content/85/977/en/513-defining-workflows.html

🕼 Agent assignment Edit Goto System Help							_ Ə X
0		8 H H	សកាតភា 🗖	7 0 %			
				(L) • •			
Standard	d task: Maintain Agent Assig	Inment					
Position (1) 290 Entries found		_ × _				
Ø 🛛 H A	1 📩 🖉 🖶						
Object ab	Object name	OrgUnit abbr	Start date End	Task Version	Assigned as of	Assigned until	
Secretary 1	Secretary Job Leasing	Job leas.	01.04.1999 31.1 ^		02 02 2017	Unlimited	
Security	Gateperson/Security officer	Real esate	01.01.1999 31.1		03.02.2017	Oninnited	
Security	Gateperson/Security officer	Real esate	01.01.1999 31.1				
Security	Gateperson/Security officer	Real esate	01.01.1999 31.1				
Security	Gateperson/Security officer	Real esate	01.01.1999 31.1				
Security	Security officer (Germany)	Int.Svcs (D)	01.01.1996 31.1				
SEI	Service Engineer I	INAE	01.01.2001 31.1				
Sekretärin E	Secretary Purchase	Purchasing	01.01.1997 31.1				
SekretärinF	Secretary finance	Fi Co	01.01.1997 31.1				
SekretärinP	Secretary HR	HR Dept.	01.01.1997 31.1				
SEN PARTNER	Senior Partner	UK CORP FIN	01.01.2004 31.1				
SEN PARTNER	R Senior Partner	UK M and A	01.01.2004 31.1				
SEN PARTNER	R Senior Partner	UK TAX	01.01.2004 31.1				
SEN PARTNER	R Senior Partner	US CORP FIN	01.01.2004 31.1				
SEN PARTNER	R Senior Partner	US M and A	01.01.2004 31.1				
SEN PARTNER	R Senior Partner	US TAX	01.01.2004 31.1				
Sen. Cons.	Senior Consultant	Cons. + Aud.	01.04.1999 31.1				
Sen. Cons.	Senior Consultant	Cons. + Aud.	01.04.1999 31.1				
Sen. Dev.	Senior Developer	Res. + Dev.	01.04.1999 31.1				
Senior CSR	Senior Customer Service Representative	e Retail R561	01.01.1996 31.1				
SERV TECH	Services Technician	SERVICES TC	01.01.2003 31.1				
Serv. Clerk	Service Clerk	Tech. Serv.	01.04.1999 31.1				
Serv. Clerk	Service Clerk	Tech. Serv.	01.04.1999 31.1				
<>			< >				
290 Entries	found						
				SAP		» TRX (1) 8	00 🗸 juneau OVR 🖉 🖻 🔒

5. This adds a new agent to the task, along with a success message that confirms the agent assignment.

🖙 Agent assignment 🛛 Edit	Goto System Help					_ @ X
 	« 🗄 🛯 🙆 🕄 🕯	ិកាក ១០០១ 🗖	# O			
Standard task: Maint	ain Agent Assign	nment				
📫 🔊 Attributes	🛅 📋 👔 Org. ass	signment 🕀 🚛				
Name	ID	General or Background Task	Task Version	Assigned as of	Assigned until	
Change purchase orders (Secretary HR Secretary Purchase	S 50002544 S 50002664			10.04.2024 03.02.2017	Unlimited Unlimited	
	`					
Agent successfully assigned			SAP		≫ TRX (1) 800 ∨ june	au OVR 🖌 🖻 🛛 🔒 🖌

6. Now, click the back button and then **Continue** on the Workflow Builder screen.



7. You can now observe the graphical model of the created workflow on the **Workflow Builder - Display 'tsk01'**.



Hence, the workflow for the task **Change Purchase Order** is created.

Unique solution ID: #1978 Author: Poojitha Reddy Last update: 2024-05-20 09:38

> Page 5 / 5 (c) 2024 Liquid UI | Synactive | GuiXT <dev@guixt.com> | 2024-07-31 16:41 URL: https://www.guixt.com/knowledge_base/content/85/977/en/513-defining-workflows.html