

Oh, the Places You Can Go with Workflows, Alerts & Stored Procedures

Presented by: Wendy Gustafson



What is a workflow

A workflow is a way to automate your processes based on an action that occurs within a Vision Info Center Application. Workflows can be triggered by an event that occurs within the Info Center (when a record is saved) or on a regularly set schedule.

Some examples of commonly used workflow are:

- Send an E-mail to a person when they are named as a project manager
- Update the lower levels (phase and/or tasks) when you update information on the project level
- Automatically update the end date of a project when the project is marked dormant



Where do I set up Workflows

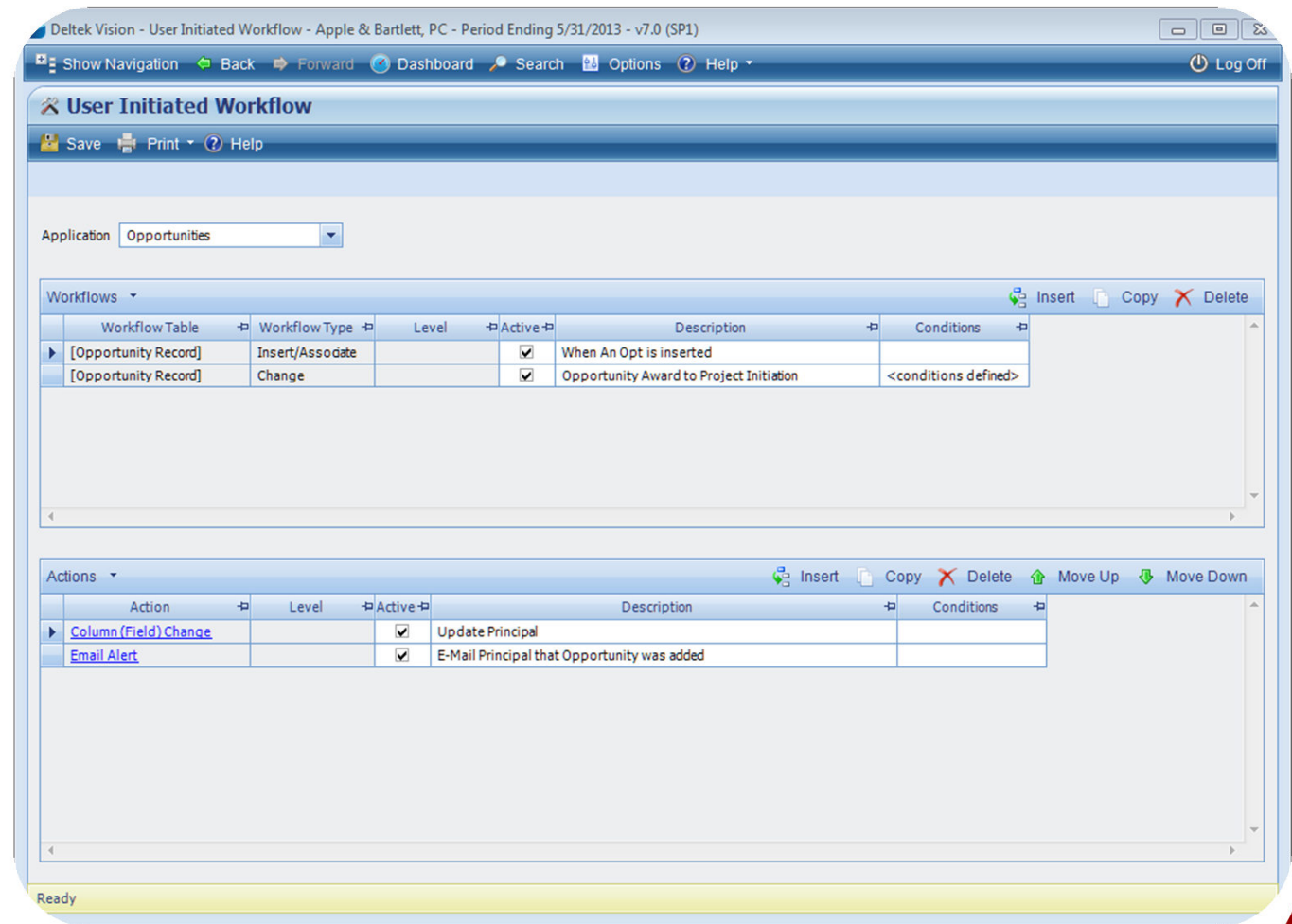
Workflow set up is in Configuration in the standard Navigation menu. There are three options under the workflow menu item:

- **User Initiated Workflows** – Allows set up of automated actions that are triggered when a record is saved and certain conditions are met.
Example: When you set a project to dormant (the condition), the project Actual Completion Date is updated when the record is saved (the automated action).
- **Scheduled Workflows** – Allows you to create automated actions that run at regular intervals via the process server.
Example: On the 1st day of every month (the regular interval), an e-mail can be sent to the supervisor for each employee whose month of hire is next month. Alternatively, a workflow button can be added to trigger the workflow “at will”.
- **Web Services** – This allows you to set up an interface between Vision and external applications



Where do I set up Workflows

- Select the Info Center Application
- Create the Workflow and Conditions
- Create the Actions and Conditions



Types of workflow actions

- **Validate Error** – Creates a “check” against the data entered and returns an error message.

Example: If a Opportunity is already “Awarded” and a change is made, then a message can appear that reads “This Opportunity is Awarded– No changes can be made”. The user will NOT be able to save the record.

- **Validate Warning** – The same as the error, but provides only a warning. The user will be able to save the record.

****Validation workflows are only available in User Initiated Workflows**

- **Email Alert** – Creates an email to a specified person or role or other employee linked field (for example project manager).

Example: The system will automatically e-mail an employee when they are named a project manager on a specific project



Workflow Actions - Continued

- **Dashboard Alert** – Same as an email alert, but puts an alert on the employees dashboard
- **Column (Field) Change** – Updates a Vision field (standard or user defined).
Example: The Completion date can be updated to the current date when a project is marked dormant (or inactive) and there is not a completion date already entered.
- **Create Activity** – This creates an activity.
Example: When a project is marked dormant, an Activity can be created to send the client a satisfaction survey one week later



Workflow Actions - Continued

- **Stored Procedure** – Executes an SQL script on the Vision database. Requires knowledge of T-SQL and stored procedures. However, this allows you great flexibility to update information across all info centers in Vision
- **Function** – Calls well known vision methods to do specific tasks like create a project from an opportunity.
Example: A project can automatically be created when an opportunity is marked as awarded.
- **Invoke A Custom Method/Invoke a Web Service** – Requires advanced programming knowledge and web services. This is outside the scope of this discussion and the experience of the speaker.



How do I create a workflow again?

Lets create the following workflows:

- Updates the Lower Levels of the Work Breakdown Structure (Project structure) to Dormant. [User Initiated Workflow]
- Creates a Promotional Project from an Opportunity when the Opportunity is marked Awarded. [User Initiated Workflow]
- Sends the Employee, HR and the Employee supervisor an e-mail when the Employee's next review date is the following month. [Scheduled Workflow]



Workflow Considerations

- What is our **problem** that needs resolution?
- **Who** are interested parties?
- What is our “**End-Game**”?
- Are **additional fields** needed?
- What are the **triggers**?
- Are there **exceptions** and how do we work around them?



Stored Procedures

Stored Procedures are a powerful tool to update information across all areas of Vision. They can be used either as user initiated workflows or as scheduled workflows.

They require special programming knowledge and, if not tested properly, can corrupt your data.

Some examples of stored procedures:

- Timesheet reminders
- Billing Terms
- Opportunity Thread
- Timesheet Comments to Activity
- Task List Completion
- Contact Verified By/Date



Questions?



Other resources from Full Sail Partners:

Resources

- **How-To Video – Applying Hotfixes in Deltek Vision:** <http://bit.ly/11FAm5E>
- **Deltek Vision AE Clarity Report:** <http://bit.ly/T5SqBl>

Articles

- **Lead Management in Deltek Vision:** <http://bit.ly/18eIOOf>
- **4 Ways to Improve Employee Utilization:** <http://bit.ly/11L5Sf8>
- **The Basic Project Management Concepts:** <http://bit.ly/147WQMt>
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Thank you for attending!

For more information contact:

Sarah Gonnella

VP of Marketing

888.552.5535 x102

info@fullsailpartners.com

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