Softengine
Newsletter

More Than Just Software

Newsletter Vol. 73 - Introduction

Softengine News is dedicated to keeping you up to date with the latest information regarding SAP Business One systems, Softengine solutions and Best Business Practices.

What's New?

Spotlight on Product – SAP Business One 9.1 Workflow

SAP Business One 9.1, is the second major release of Release Family 9. With the 9.1 release, SAP continues to demonstrate its commitment to addressing specific product needs requested by small and mid-size enterprise (SME) businesses.

SAP Business One Studio and Workflow Function
Workflow is a business process that consists of a series of connected tasks or events in sequence. It usually includes a group of tasks, the relations of the tasks, and the conditions for starting and terminating the tasks.

In SAP Business One, the workflow function enables a standard process that can be applied to a series of tasks or events for different business types in a real work environment. The workflow function provides a consolidated entry for users to process all the tasks in which they are involved. With the predefined condition, the workflow function can execute some tasks automatically in the system, so the liberated labor resource can be better allocated to increase the outcomes. It also provides management with overall control of the business process within the organization, and helps to enhance operating efficiency.

Workflow function in SAP Business One is based on the BPMN. For more information, see Business Process Model and Notation http://www.bpmn.org/.

To use the workflow function in SAP Business One, you must do the following:
- Configure the workflow service in SAP Business One Service Manager
- Design the workflow process templates in SAP Business One Studio

Designing workflow process templates ensures that standard procedures are set for each type of business operation carried out in your company, for example, the purchasing process, employee reimbursement process, outgoing payment process and so on. SAP Business One Studio provides an open platform where you can design the workflow process templates your company needs. Through a combination of the workflow elements provided in SAP Business One Studio and the property settings of these elements, the templates designed in SAP Business One Studio can widely cover actual types of business activities.

Examples of Workflow Scenarios

Create Business Partners and Update Business Partners
When your company develops a new supplier, the purchase department uses the corresponding workflow template to add the business partner to the system and registers its general information.

Then the finance department finds the record of this business partner and updates this record by adding the business partner's financial information, such as credit limit, bank information, tax code and so on.

Check Inventory Level and Transfer
Your company wants to build an inventory checking and transferring system. The system checks the quantity of the inventory in warehouse 02, and whenever the quantity is less than 1000, the main warehouse transfers inventories to warehouse 02 to replenish the stock.

Develop a New Customer and Provide a Sales Quotation
Your company gets a sales opportunity from a new customer. The sales department calls the customer to acquire basic information and learn the needs of the customer.

Next, the sales department records this customer in the system and confirms with the warehouse that they have the inventories the customer needs.

Finally, your company generates a sales quotation for this customer.

Approval Procedures for Adding Business Partner Master Data
According to the internal control requests of a company, employees cannot add new business partner data to the system without the approval of management. Senior employees or managers need to check or verify the information before approving the addition of new business partners to the system.

In this example, employees in the "Sales" team and the "Purchase" team are in charge of creating customers or vendors in the B1 application. The sales manager or the purchase manager decides whether to approve the addition of a customer or a vendor to the B1 application, or whether the customer/vendor should be rejected and returned for revision or further completion.

Upgrade Path

Upgrading to 9.1 and staying on maintenance provides you access to the latest patches, support packs and new versions, as well as to legal compliancy updates and improved support for legal compliancy, and more. Our "hosted" customers will be upgraded as the version is now available for General Distribution. Our "on-premise" customers can request to be upgraded. A Fast and Well-tested Upgrade Process can often be completed in about a week, including training on the new features. The SAP/Softengine Upgrade Process provides our clients with a standard and documented upgrade methodology. Upgrade Phases:
- Upgrade Preparation
- Technical Upgrade Process
- Testing, Troubleshooting and Training
- Go-Live with SAP Business One 9.1

For more information about upgrading to SAP Business One 9.1, please contact Barry Lederman: 818.704.7000, blederman@softengineusa.com.