

Workflow Documents 2019 (6.6)

Workflow Documents allows organisations with complex or technical approval demands to attach files to the requisition document. Rapid access to all relevant information enables streamlined workflow processes and process improvements.

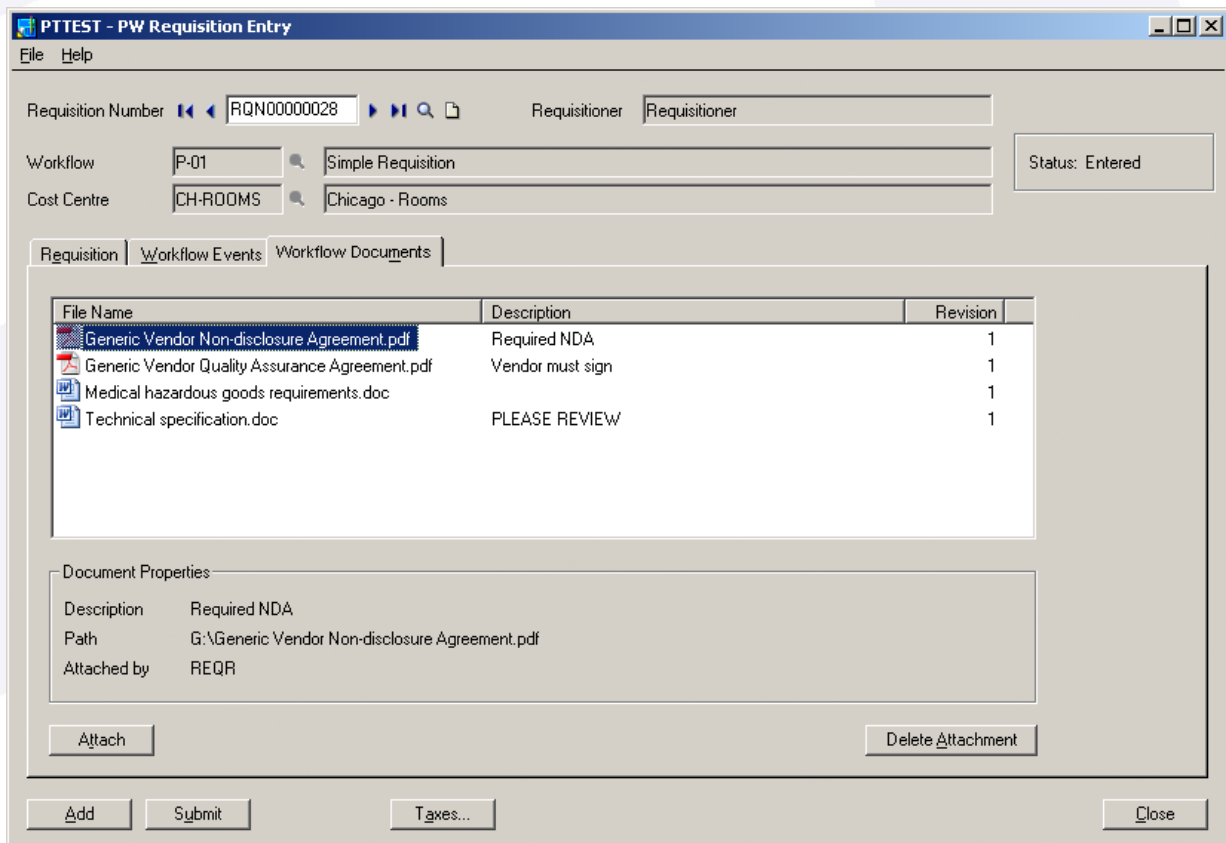
Purchasing Workflow now has an enhanced ability to provide a single streamlined approval and auditing system with the release of Workflow Documents.

Designed to meet the needs of organisations with a more technical approval process, documents can be attached to the requisition for review prior to approval in the process.

Total Sage 300 Integration

Totally seamless with the Sage Accpac ERP standard User Interfaces, Workflow Documents is simple to use and provides rapid operational efficiencies.

Attachments are stored in the Sage 300 database and can be instantly accessed or optionally distributed using the Workflow email engine.



The screenshot shows the 'PTTEST - PW Requisition Entry' window. At the top, there are fields for 'Requisition Number' (RQN00000028) and 'Requisitioner' (Requisitioner). Below these are 'Workflow' (P-01, Simple Requisition) and 'Cost Centre' (CH-ROOMS, Chicago - Rooms) fields. A 'Status: Entered' button is visible on the right. The main area has three tabs: 'Requisition', 'Workflow Events', and 'Workflow Documents'. The 'Workflow Documents' tab is active, displaying a table of attachments:

File Name	Description	Revision
Generic Vendor Non-disclosure Agreement.pdf	Required NDA	1
Generic Vendor Quality Assurance Agreement.pdf	Vendor must sign	1
Medical hazardous goods requirements.doc		1
Technical specification.doc	PLEASE REVIEW	1

Below the table is a 'Document Properties' section for the selected file:

Description: Required NDA
 Path: G:\Generic Vendor Non-disclosure Agreement.pdf
 Attached by: REQR

At the bottom of the window are buttons for 'Attach', 'Delete Attachment', 'Add', 'Submit', 'Taxes...', and 'Close'.

Document Embedding

An important technical aspect to Workflow Documents is that the source files are “Embedded” into the Sage 300 database rather than “Linked”.

Document embedding means that the physical document is stored in the Sage 300 database along with the requisition document details. This allows for simple but comprehensive management of the attachment files.

Document Embedding provides a sound solution that overcomes many technical issues:

- Drive mapping and/or security constraints
- VPN requirements
- Source document deletion, modification or manipulation

Users who are involved in an organisation’s approval process but who may operate off site can have documents attached with notification emails. A user can open a document directly from the requisition form.

Availability & System Requirements

300 Editions: Standard, Advanced and Premium

Databases: Microsoft SQL Server

Languages: English, Spanish, French & Simplified Chinese

Required Modules:

- Purchasing Workflow or Payables Workflow

Pacific Technology Solutions has a long and successful history as a Sage Development Partner developing Sage 300 modules that enhance the functionality and capability of the Sage 300 solution.

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