What can the app do?

With DEXPRO Advanced Workflow you model approval and decision processes:

- A workflow is started for a specific Business Central record (e.g. a document header).
- The workflow runs in steps/stages (e.g. 1. review, 2. release, final).
- Each step defines an assignee (user, workflow user group, salesperson/purchaser, etc.).
- Rules can decide whether and where the workflow moves next.

- Central objects
- Approving in practice
- Related approvals

Central objects

- **Workflow Template** ("AWF Workflow Template") – your definition (one-time)
- **Workflow Instance** ("AWF Workflow Management") – a running/completed execution of the template (per record)
- **Step** ("AWF Workflow Step") – an approval/decision step within the template
- **Workflow Trigger** ("Workflow Trigger") – starts an instance when an event occurs
- **Rule Engine (DEXPRO Core)** – the decision logic:
  - **Rule Set**: framework for tables + rule groups
  - **Rule Group**: collection of rules (e.g. "trigger conditions" or "step selection")
  - **Rule**: a single rule with priority
  - **Rule Conditions**: concrete conditions (field/operator/value)
  - **Rule Action**: defines *what happens*, when a rule matches (e.g. step transition, override assignee, auto-approve)
  - **Applies To**: determines whether the rule action applies to the header approval, related approvals (lines), or both

Approving in practice

Requests to Approve (for every table)

DEXPRO Advanced Workflow can be used **for practically any table** because processing the approval does not necessarily have to happen on a specific document/card page.

When a workflow creates an approval, approvers can process it via the (standard Business Central) page **"Requests to Approve"** . This page is extended by AWF:

- **Record Preview**: In the **"Record Preview"** FactBox you see the underlying record.
- **Claim information**: The fields **"Claimed By"** and **"Claimed Date/Time"** show who has claimed a group approval.
- **Related Approvals**: The field **"Related Approval"** marks line approvals; the **"Related Approvals"** FactBox shows further related line approvals for the same workflow instance.
- **Approval Actions**: Actions such as **"Approve"**, **"Reject"**, **"Delegate"** and **"Cancel Approval Request"**.
- **Approval Claims**: Actions **"Claim Approval"** and **"Release Claim"**.
- **Approval Administrator** (if authorized): among others **"Reassign Approval"**.

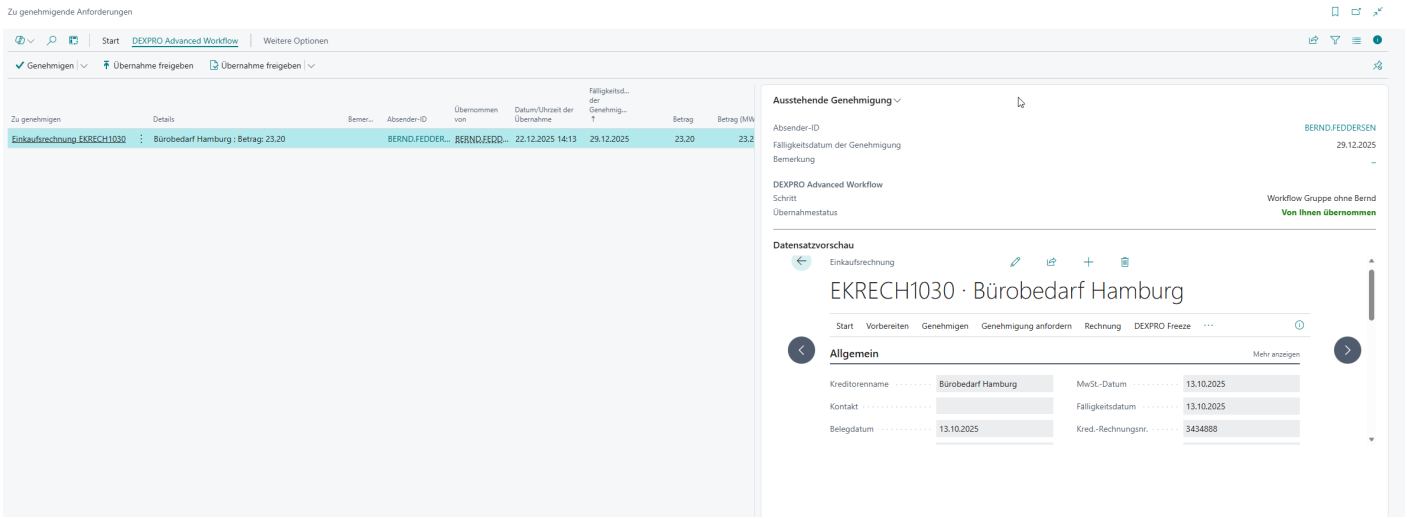
Important: Before **approving/rejecting/delegating**, first choose **"Claim Approval"** so that you can work on the request exclusively.

Releasing a claim

"Claim Approval" and **"Release Claim"** exist for **group approvals** only — approvals assigned to a workflow user group. "Release Claim" gives such an approval back to exactly the group it was claimed from, also when a rule, a reassignment or an out-of-office substitution chose that group: the other members' approvals that the claim cancelled are reopened, and any member can claim the approval again.

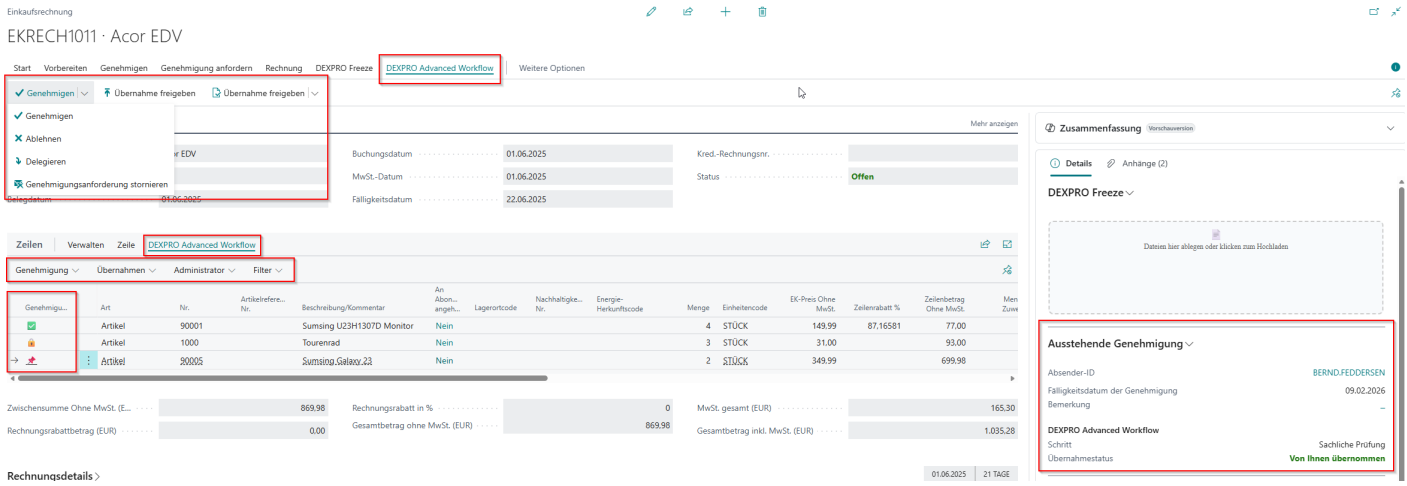
> An approval assigned to one approver directly, or through the document's salesperson/purchaser, is claimed automatically and cannot be released — there is no group for it to go back to. "Release Claim" is not offered for it, and for approval administrators "Release Claim" ("Release Line Claim" on document lines) is greyed out. To have somebody else work on such an approval, reassign it with **"Reassign Approval"**. The administrator's "Claim" (taking the approval over) remains available for directly assigned approvals too.

With several document lines selected, "Release Line Claim" — the user's action as well as the administrator's — releases the group approvals and skips the others; so does the administrator's "Release Claim" in the "Related Approvals" FactBox. Elsewhere, an attempt to release a directly assigned approval is refused with (%1 is the approver): **This approval is assigned to %1 directly, not to a workflow user group, so there is no group to release it to. To hand it to somebody else, reassign it.**



Using a purchase invoice as an example:

Here you can control the approval process at header and (if enabled) line level.



Related approvals

Related approvals are **additional approval requests** for a running workflow instance – typically for **related records (e.g. document lines)**.

Goal: You can model approvals **at line level** without all processing having to happen exclusively on the document header.

Prerequisites

- In the workflow template, Related Tables (e.g. sales/purchase lines) are correctly linked to the primary table. - In the respective step, **Enable Related Approval** is enabled.

Configuration in the step

1. In the workflow template → section **Steps** → open the desired step.
2. In the area **Approvals**:
   - **Enable Related Approval** = Yes
   - **Approval Mode** choose:
     - **Header and Related**: approval(s) for the header *and* related approvals (lines)
     - **Related Only**: only related approvals (lines)

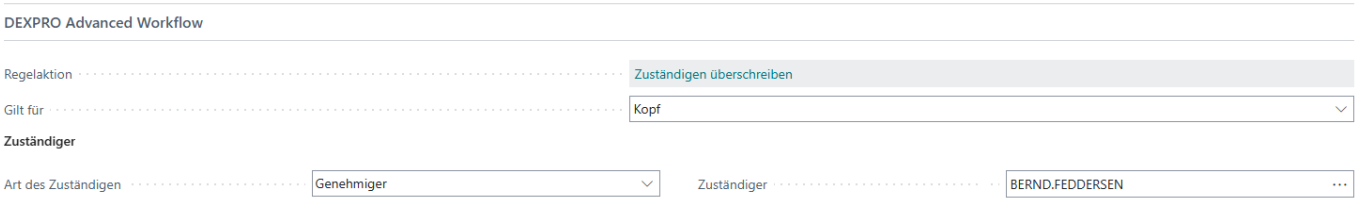


Rule effect (rule action) for related approvals

When related approvals are active, rules can additionally control **for which approval type** the action applies:

Applies To:

- **Header**: the rule action affects only the header approval.
- **Related Only**: the rule action affects only related approvals (lines).
- **Header and Related:** the rule action affects both.



Usage in practice

- In **"Requests to Approve"** line approvals are marked via **Related Approval** .
- When you select a line approval, the FactBox **"Related Approvals"** shows further related approvals for the same workflow instance (incl. status/take-over info).

