WHITE PAPER

TRIMIT Workflow

TRIMIT version: **24.2**

Date: **February 11, 2025**

TRIMIT

Table of Contents

Introduction

In this White Paper, the functionality regarding **TRIMIT Workflows** is described. In a Workflow we can enter Activities (Step Nos.) that need to be executed by Users, User Groups, Customers or Vendors.
An Activity can result in a Status change of the entity to which the Workflow is attached.

In this document will be described what a Workflow is, on which entities it can be found and how it can be setup by using a Workflow Template or manually. We will also go deeper into the Workflow Activities themselves and what eventual consequences in which entities they could result.

The TRIMIT Workflow is in no way connected to the standard Business Central Workflow!
These are totally different functionalities.

The audience for this document is the Consultant or very skilled User. It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality. Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as of **TRIMIT 24.2 for Business Central W1 BC25.X**.
The pictures in this White Paper are based on the demo data for **TRIMIT 24.2,** which is based on Microsoft Dynamics 365 Business Central 2024 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

Components

TRIMIT Workflow contains the following objects:

The tables

6037183 trm Workflow Templates
6037192 trm Workflow

The pages

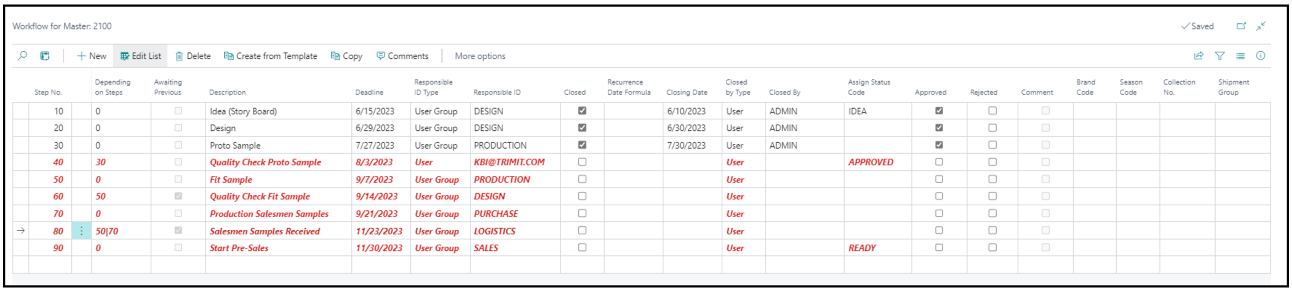
6036804 trm Workflow FactBox
6037174 trm Workflow Activities List
6037189 trm Workflow Due List
6037195 trm Workflow Templates
6037196 trm Workflow Template Lines
6037197 trm Workflow Comment Sheet

Many other pages are affected by the TRIMIT Workflow functionality because you can connect a TRIMIT Workflow to many entities.
But the above-mentioned objects are the specific objects regarding TRIMIT Workflow.

What is a TRIMIT Workflow?

Introduction

A **TRIMIT Workflow** is a combination of Activities that needs to be executed by a User, User Group, Customer or Vendor for a specific entity. In the picture below we see an example of a Workflow based on a specific **Master** *2100*. In this case we see Activities (Step Nos.) listed that are needed to follow up by design department, but it is possible to have the complete Lifecycle of a product to be controlled by Activities in a TRIMIT Workflow.



Workflow for Master: 2100 ✓Saved

New | Edit List | Delete | Create from Template | Copy | Comments | More options

Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Recurrence Date Formula	Closing Date	Closed by Type	Closed By	Assign Status Code	Approved	Rejected	Comment	Brand Code	Season Code	Collection No.	Shipment Group
10	0	☐	Idea (Story Board)	6/15/2023	User Group	DESIGN	☑		6/10/2023	User	ADMIN	IDEA	☑	☐	☐				
20	0	☐	Design	6/29/2023	User Group	DESIGN	☑		6/30/2023	User	ADMIN		☑	☐	☐				
30	0	☐	Proto Sample	7/27/2023	User Group	PRODUCTION	☑		7/30/2023	User	ADMIN		☑	☐	☐				
40	30	☐	Quality Check Proto Sample	8/3/2023	User	KBI@TRIMIT.COM	☐			User		APPROVED	☐	☐	☐				
50	0	☐	Fit Sample	9/7/2023	User Group	PRODUCTION	☐			User			☐	☐	☐				
60	50	☑	Quality Check Fit Sample	9/14/2023	User Group	DESIGN	☐			User			☐	☐	☐				
70	0	☐	Production Salesmen Samples	9/21/2023	User Group	PURCHASE	☐			User			☐	☐	☐				
80	50|70	☑	Salesmen Samples Received	11/23/2023	User Group	LOGISTICS	☐			User			☐	☐	☐				
90	0	☐	Start Pre-Sales	11/30/2023	User Group	SALES	☐			User		READY	☐	☐	☐				

Workflow Activity List

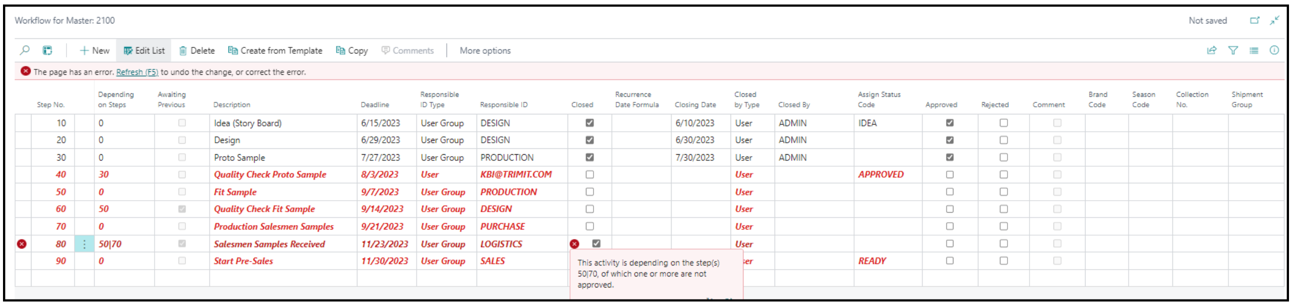
In this paragraph the fields of the **Workflow Activity List** are discussed. Some of them are not shown by default and need to be selected via ***Personalize***. These fields are marked with an *.
The Lines for which the **Deadline** is in the past – based on the Work Date – will be shown in red.

Step No.

Every Activity has a **Step No.** This **Step No.** has to identify an Activity and is unique within a Workflow. The Workflow Activity List is by default sorted by this field.

Depending on Steps*

In this field you can enter a filter of **Step Nos.** that needs to be *Closed* before you can *Close* the current Step No. Otherwise you will get an error message as shown in below picture.
I.e., when you want to *Close* **Step No.** *80*, the **Step Nos.** *50* and *70* already need to be closed.



Workflow for Master: 2100 Not saved

New | Edit List | Delete | Create from Template | Copy | Comments | More options

The page has an error. Refresh (F5) to undo the change, or correct the error.

Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Recurrence Date Formula	Closing Date	Closed by Type	Closed By	Assign Status Code	Approved	Rejected	Comment	Brand Code	Season Code	Collection No.	Shipment Group
10	0	☐	Idea (Story Board)	6/15/2023	User Group	DESIGN	☑		6/10/2023	User	ADMIN	IDEA	☑	☐	☐				
20	0	☐	Design	6/29/2023	User Group	DESIGN	☑		6/30/2023	User	ADMIN		☑	☐	☐				
30	0	☐	Proto Sample	7/27/2023	User Group	PRODUCTION	☑		7/30/2023	User	ADMIN		☑	☐	☐				
40	30	☐	Quality Check Proto Sample	8/3/2023	User	KBI@TRIMIT.COM	☐			User		APPROVED	☐	☐	☐				
50	0	☐	Fit Sample	9/7/2023	User Group	PRODUCTION	☐			User			☐	☐	☐				
60	50	☑	Quality Check Fit Sample	9/14/2023	User Group	DESIGN	☐			User			☐	☐	☐				
70	0	☐	Production Salesmen Samples	9/21/2023	User Group	PURCHASE	☐			User			☐	☐	☐				
80	50|70	☑	Salesmen Samples Received	11/23/2023	User Group	LOGISTICS	☑			User			☐	☐	☐				
90	0	☐	Start Pre-Sales	11/30/2023	User Group	SALES				ser		READY	☐	☐	☐				

This activity is depending on the step(s) 50|70, of which one or more are not approved.

Awaiting Previous*

This is a non-editable Boolean field which will be ticked the moment the **Depending on Steps** is entered. If there is no value in the **Depending on Steps** field the Boolean is not ticked. This field could be used for filtering Activity Lines whether they have dependencies on other Activity Lines or not.
If the **Depending on Steps** are all *Closed*, the checkmark in **Awaiting Previous** will be removed.
I.e., **Step No.** *40* in the above picture.

Description
In this field you can enter a **Description** of the Activity to be executed. If more information is required, it is possible to enter Comments per Activity Line. This is discussed in the next paragraph.

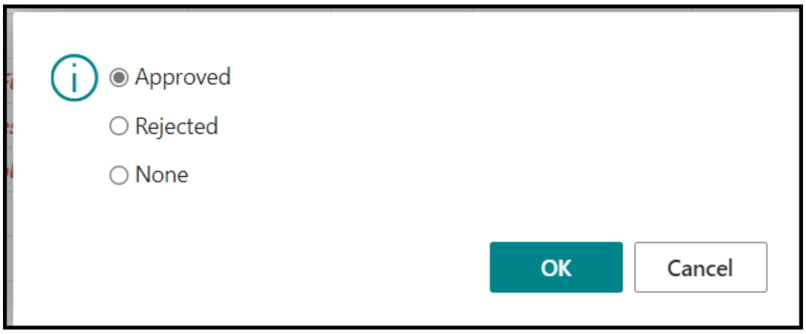
Deadline
In this field you can enter the Date for the **Deadline** of a specific Activity. This deadline can also be calculated by using the Workflow Template. This is discussed in Workflow Templates.

Responsible ID Type
The **Responsible ID Type** is an Option Field that can have 4 different Values that determine which Type of Responsible entity could be assigned to an Activity Line. In the field **Responsible ID,** the appropriate entity can be selected.
You can choose between the following four options:

User	An Activity Line can be assigned to a specific **User** by selecting a User Name from the Table **Users**. This Activity Line will be shown in the Activity List of the selected User.
User Group	An Activity Line can be assigned to a specific **User Group** by selecting a User Group from the Table **Group Codes – Workflow User Groups**. This Activity Line will be shown in the Activity List for all Users attached to this User Group. The User Group is discussed in detail in Workflow User Group
Vendor	An Activity Line can be assigned to a specific **Vendor** by selecting a Vendor from the **Vendor List**. This Activity Line will be shown in the Activity List for this **Vendor** on the TRIMIT Web Supplier. It is advisable only to use this Type, if the selected Vendor uses the Web Supplier to maintain its activities.
Customer	An Activity Line can be assigned to a specific **Customer** by selecting a Customer from the **Customer List**. Currently there is no possibility in standard TRIMIT that the Customer can see which activities has been assigned to him (for instance: approval of a sample). In those cases, it is better to assign this Activity Line to a User or User Group that should contact this Customer.

Responsible ID
Depending on the **Responsible ID Type**, you can enter a **User**, **Workflow User Group, Vendor No.,** or **Customer No.**

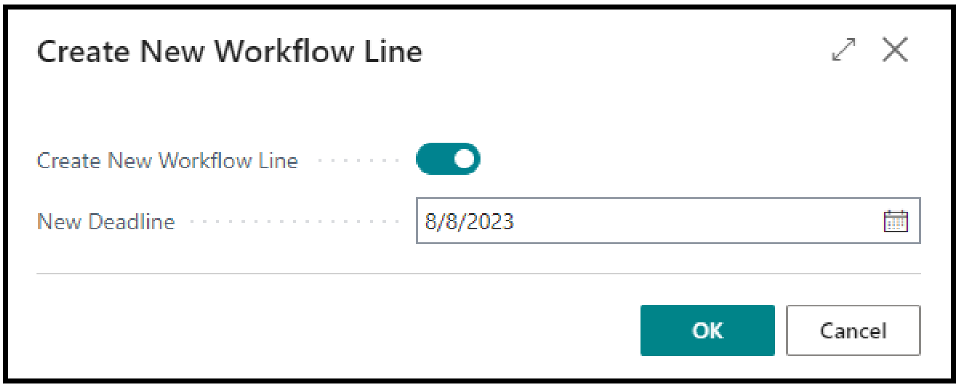
Closed
This is a Boolean Field that determines whether an Activity Line is Closed or not. However, if you want to close an Activity Line an Option Request Page pops up.



You can choose between the following three options:

Approved	The Activity Line will be Closed and the Boolean **Approved** will be ticked. It can also ask you to create a copy of the current Activity Line if the **Recurrence Date Formula** has been filled.
Rejected	The Activity Line will be Closed and the Boolean **Rejected** will be ticked. A new Activity Line can be created to follow up in which a new **Deadline** can be suggested based on the filled **Recurrence Date Formula**.
None	The Activity Line will be Closed, but neither **Approved** nor **Rejected** will be ticked.

When choosing *Rejected,* you will always get the following Dialog:



With **Create New Workflow Line** set to *Yes,* you can create a new Activity Line with a **New Deadline** – which can be calculated based on the **Recurrence Date Formula** (if filled). You can change the **New Deadline**.

When choosing *Approved,* you will only get the above Dialog if the **Recurrence Date Formula** is filled.
When choosing *None,* you will never get the above Dialog.

Recurrence Date Formula*

When you **Close** a Workflow Line, you can choose *Approved, Rejected* or *None*.
For *None,* the **Recurrence Date Formula** does not have any consequences.
For *Rejected* you can create a new Workflow Line with a new **Deadline**; that Deadline Date can automatically be calculated based on the **Deadline** of the Rejected Line + the **Recurrence Date Formula**.
For *Approved* you can now also create a new Workflow Line if the **Recurrence Date Formula** is filled – even if it is filled with *0D*.
I.e., a Sample should be created for 5 Sizes; you only have 1 original Step for the Sample in the Workflow, but have a **Recurrence Date Formula**, so you can now easily create 4 new Workflow Lines when you **Close** the Workflow Line.
The field **Recurrence Date Formula** is also available in the Workflow Template, but not visible.

Closed Date

In this field the Work Date will be filled automatically on which this Activity is **Closed**.

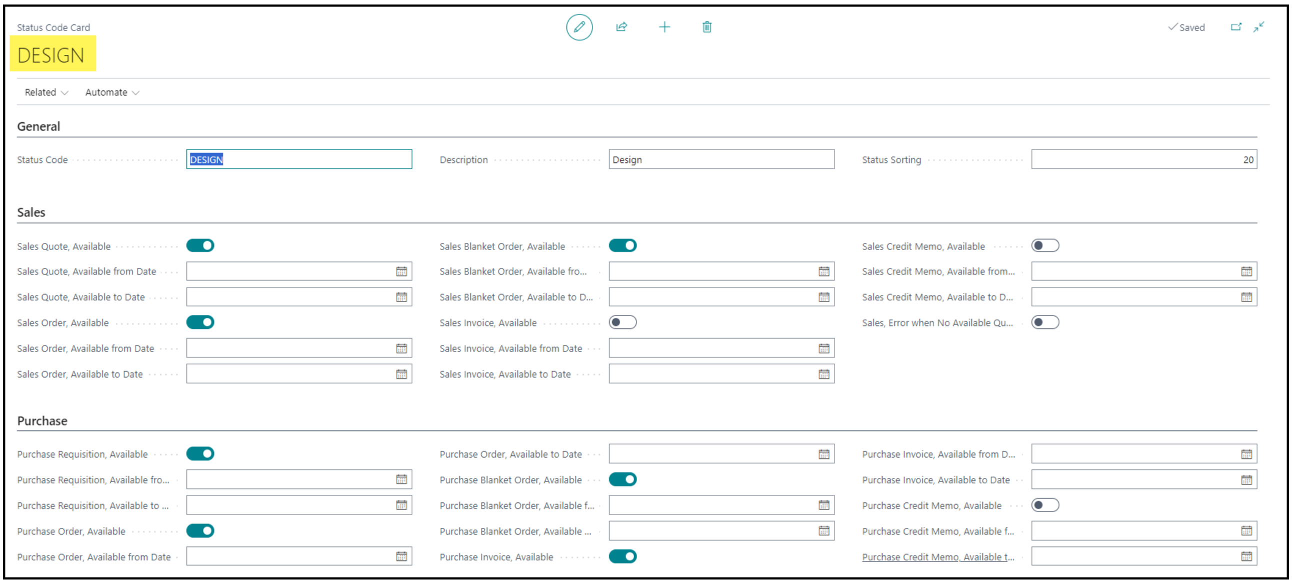
Closed By Type & Closed By

In **Closed By Type** the **ID Type** is automatically filled when closing an Activity Line. The Type can then be *User* if closed in the ERP or *Vendor* if closed via the TRIMIT Web Supplier.
You can however overwrite these defaults if another User as the current User has closed this Activity Line

In **Closed By** the User ID of the logged in person that closed the Activity Line will be filled automatically if closed in the ERP. The field will automatically be filled with the Vendor No. of the logged in User from the TRIMIT Web Supplier if the Activity Line is closed via the TRIMIT Web Supplier.
You can however overwrite this default.

Assign Status Code

During its Lifecycle, a Product could pass several milestones. These could be marked by the TRIMIT **Status Code**. The Status Code on the entity will get the **Assign Status Code**, the moment an Activity Line is **Approved**.
Depending on the **Status Code** a Product can be excluded from specific Sales- or Purchase processes as can be seen in the Status Code Card below maintained by checkmarks in the appropriate fields. The absence of a checkmark indicates that Products with this Status Code are not available for the particular process.



The **Assign Status Code** can only be used if the Workflow is attached to a Master, Collection or Container.

If the Workflow is connected to a **Master,** there are several options:

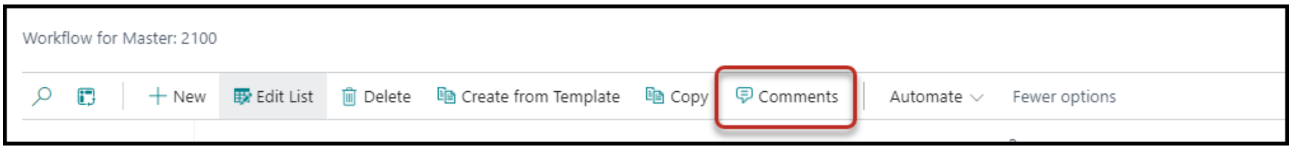
Master is not connected to a Collection and/or Shipment Group and the fields **Collection No.** and/or **Shipment Group** are not filled in the Activity Line	Status Code of the **Master** will be updated with the **Assign Status Code** of the Activity Line when the line is *Approved.*
Master is connected to a Collection and the **Collection No.** is filled in the Activity Line	Status Code of the **Collection Master Relation** with the Collection No. of the Activity Line will be updated with the **Assign Status Code** of the Activity Line when the line is *Approved.*
Master is connected to a Shipment Group and the **Shipment Group** is filled in the Activity Line	Status Code of the **Collection Master Relation** with the Shipment Group of the Activity Line will be updated with the **Assign Status Code** of the Activity Line when the line is *Approved.*
Master is connected to a Collection and a Shipment Group, and the **Collection No.** and **Shipment Group** are filled in the Activity Line	Status Code of the **Collection Master Relation** with the Collection No. and Shipment Group (Period Code) of the Activity Line will be updated with the **Assign Status Code** of the Activity Line when the line is *Approved.*

If the Workflow is connected to a **Collection** the **Status Code** of the Collection will be updated with the **Assign Status Code** of the Activity Line when the line is *Approved*.

If the Workflow is connected to a **Container** the **Status Code** of the Container will be updated with the **Assign Status Code** of the Activity Line when the line is *Approved*.

Comment*

By clicking ***Comments***, you can add Comments to the specific Activity Line.



If Comments exist on an Activity Line this Boolean will be ticked. This field is not editable.

Global Dimension 1 & 2 (or Brand Code and Season Code)*

It is possible to assign Activity Lines to a **Global Dimension 1** and/or **2**. In the TRIMIT Demo Company the Global Dimensions 1 and 2 are set as Brand Code and Season Code.
If you want to use the **Depending on Steps**, you can only enter the **Step Nos.** with the same Global Dimension 1 and/or 2.
Furthermore, it is possible to set a filter on the Global Dimension 1 and/or 2 Column to view only the Activity Lines belonging to this Global Dimension 1 and/or 2.

Collection No.*

It is possible to assign Activity Lines to a **Collection No.**
You can only enter a **Collection No.** if the **Shipment Group** is not filled.
It has the same function as Global Dimensions as mentioned above.
When creating a Workflow based on a Workflow Template on a Sales Document with a **Collection No.** in the header, the **Collection No.** will be filled automatically.
When creating a Workflow based on a Workflow Template on a Purchase Document with a **Collection No.** in the header, the **Collection No.** will be filled automatically.

Shipment Group*

It is possible to assign Activity Lines to a **Shipment Group No.**
You can only enter a **Shipment Group** if the **Collection No** is not filled.
It has the same function as Global Dimensions as mentioned above.

Approved* & Rejected*

If during closing of the Activity Line the option *Approved* has been chosen, the Boolean **Approved** will be ticked. This is a non-editable field.
If during closing of the Activity Line the option *Rejected* has been chosen, the Boolean **Rejected** will be ticked. This is also a non-editable field.

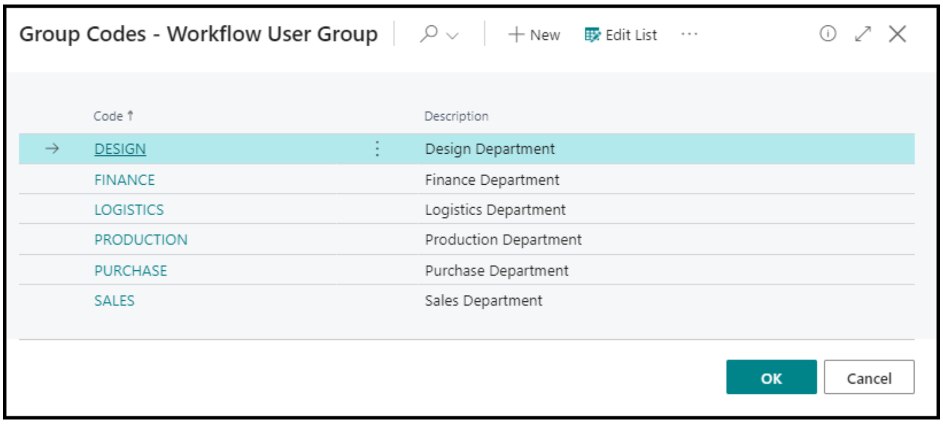
Workflow User Group

In this chapter we will discuss the use and setup of the **Workflow User Group**. As described in the previous chapter a **Responsible ID Type** *User Group* can be entered on an Activity Line. A User Group can contain multiple Users. If a Workflow Activity Line is assigned to a User Group, all Users in this User Group will see this Activity Line in their **Workflow Due List** depending on the filters in this Workflow Due List, but only one User needs to close this Activity Line.

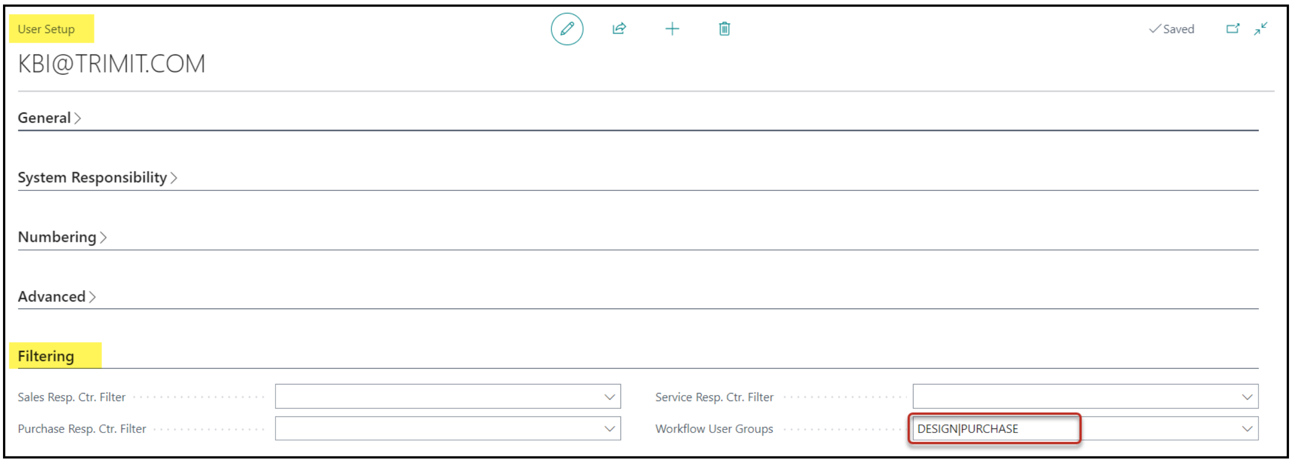
It is possible that a User belongs to more than one User Groups. The setup of a User Group with its Users is discussed in the next paragraph.

Setup (Workflow) User Group

In the table ***Group Codes (6036682)*** all kinds of **Workflow User Groups** can be setup for instance per department as shown in the picture below.
You can access this table – with the specific predefined filter on *Workflow User Group* - via the field **Responsible ID** of an Activity Line if the **Responsible ID Type** is set to *User Group* or via the **User Setup** field **Workflow User Group**.



In the **User Setup** (via **Search** *User Setup*) we can determine which Users are connected to which Workflow User Groups. In the example below we have chosen to connect the User to *DESIGN* and *PURCHASE*.
The two Workflow User Groups are divided by the pipeline '|' as you normally would do in setting up filters.



Where can we find Workflows?

In the next paragraph you will find a list of entities on which you would be able to add a Workflow.

List of Entities with Workflow

The Workflow can be found in the following pages:

Entity	On Page	Action
Master	Master List/Card	***Home, Workflow***
	BOM Component Lines	***Related, Master Workflow***
	Collection Master Relations	***Home, Workflow***
Item	Item List/Card	***Actions, PDM, Workflow***
Customer	Customer Card	***Home, Workflow***
	Customers List	***Related, Customer, Workflow***
Vendor	Vendor List/Card	***Related, Vendor, Workflow***
Collection	Collection List/Card	***Related, Workflow***
Shipment Group	Shipment Groups List	***Related, Period Code, Workflow***
Container	Container List/Card	***Workflow***
Sales Order	Sales Orders List	***Related, Order, Workflow***
	Sales Order Card	***Home, Workflow***
	Intercompany Sales Orders List	***Related, Order, Workflow***
	Sales Quote Card	***Actions, Quote, Workflow***
	Blanket Sales Order Card	***Related, Order, Workflow***
Purchase Order	Purchase Order List/Card	***Related, Order, Workflow***
	▪ Intercompany Purchase Orders List	***Related, Order, Workflow***
	▪ Purchase Quote Card	***Related, Quote, Workflow***
	▪ Blanket Purchase Order Card	***Related, Order, Workflow***
Production Order	Production Orders List	***Related, Order, Workflow***
	▪ Production Order Card	***Related, Workflow***
Production Collecting Order	Production Collecting Orders List	***Related, Workflow***
	▪ Production Collecting Order Card	***Related, Order, Workflow***
Complaint	Complaint List/Card	***Related, Complaint, Workflow***
Replacement	Replacement List/Card	***Related, Workflow***
Category	Categories List	***Workflow***
	Category Card	***Related, Workflow***

Status Code

Not all entities which can have a Workflow have a TRIMIT Status Field. For that reason, it is not possible to have an **Assign Status Code** entered on the Workflow Activity Line in every entity.
This will result in a warning.
The entities for which you can enter an **Assign Status Code** are:

- Master
- Collection
- Container

How can we create a Workflow?

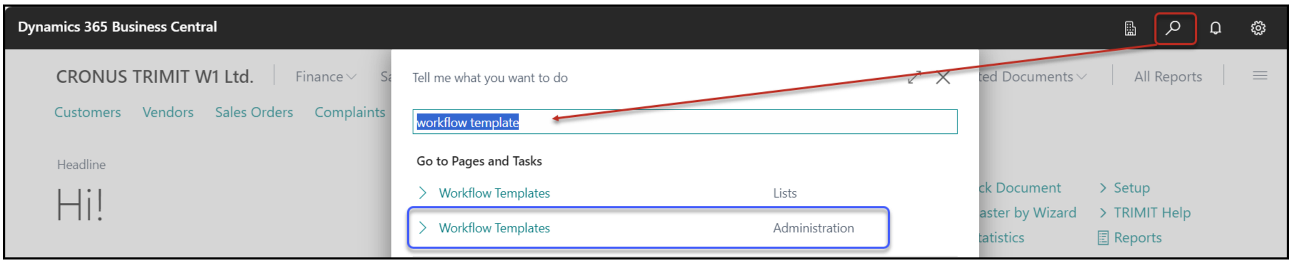
Introduction

In this chapter the creation of a Workflow is discussed. This can be done in five ways:

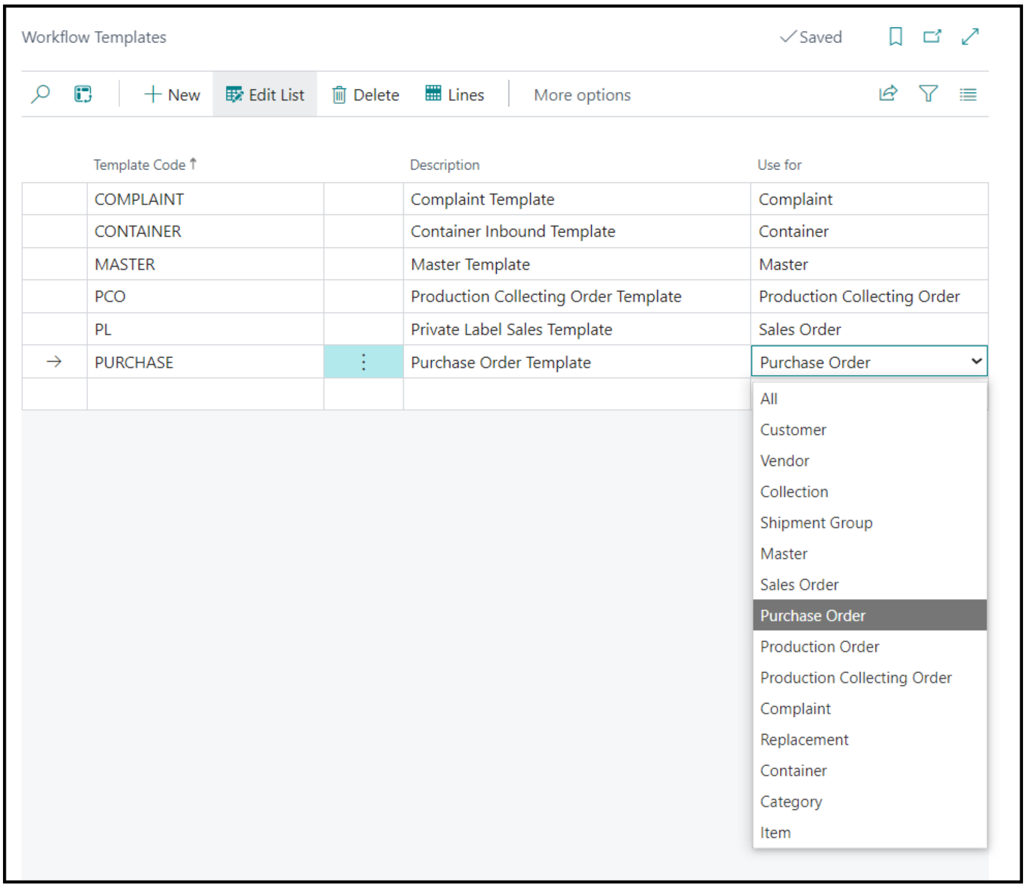
1. Use Workflow Templates
2. Copy (in the Workflow)
3. Copy Values (in the Master List/Card)
4. Copy Workflow (when using the Wizard to copy a Master)
5. Manually

Workflow Templates

It is possible to create a Workflow using **Workflow Templates**.
They can be found via **Search** *Workflow Template*.



The first **Workflow Templates** (Lists) is the Template for the Business Central Workflow.
The second **Workflow Template** (Administration) is the Template for the TRIMIT Workflow.



Template Code

In this field you have to enter the alphanumerical Code for a Workflow Template.

Description

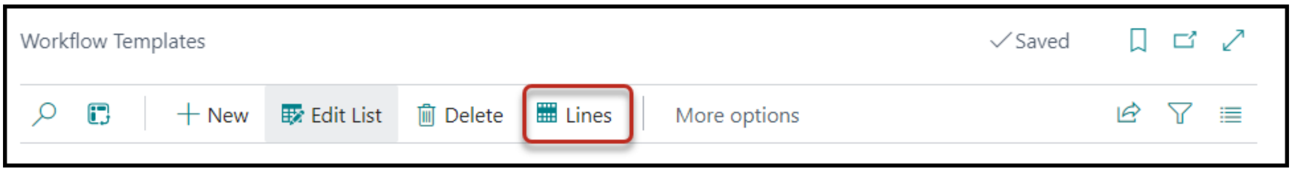
In this field you can enter a Description of the Workflow Template.

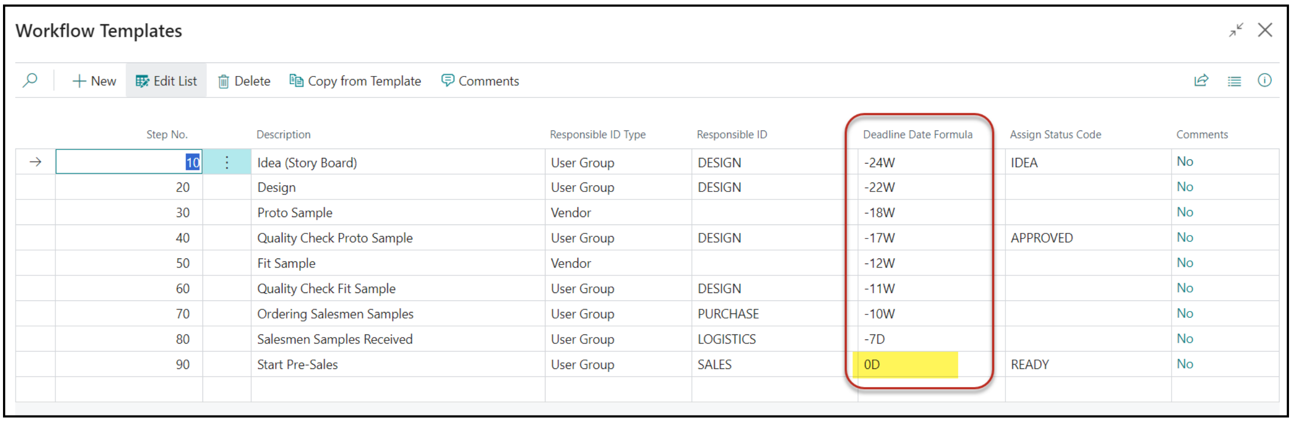
Use for

In the **Use for** field, you can select the appropriate option for which entity the Workflow is mended to be. This could be all the possible entities as described in [List of Entities with Workflow](), including an option *All*, which means that this Template can be used on all entities.
This **Use for** field acts as a filter, so that when you are on a specific entity you can only select those Templates that have a **Use for** Value *identical* to the entity or the **Use for** value *All*.

Workflow Template Lines

Via clicking ***Lines,*** you will go to the **Workflow Template Lines** of the Workflow Template.





Step No.	Description	Responsible ID Type	Responsible ID	Deadline Date Formula	Assign Status Code	Comments
10	Idea (Story Board)	User Group	DESIGN	-24W	IDEA	No
20	Design	User Group	DESIGN	-22W		No
30	Proto Sample	Vendor		-18W		No
40	Quality Check Proto Sample	User Group	DESIGN	-17W	APPROVED	No
50	Fit Sample	Vendor		-12W		No
60	Quality Check Fit Sample	User Group	DESIGN	-11W		No
70	Ordering Salesmen Samples	User Group	PURCHASE	-10W		No
80	Salesmen Samples Received	User Group	LOGISTICS	-7D		No
90	Start Pre-Sales	User Group	SALES	0D	READY	No

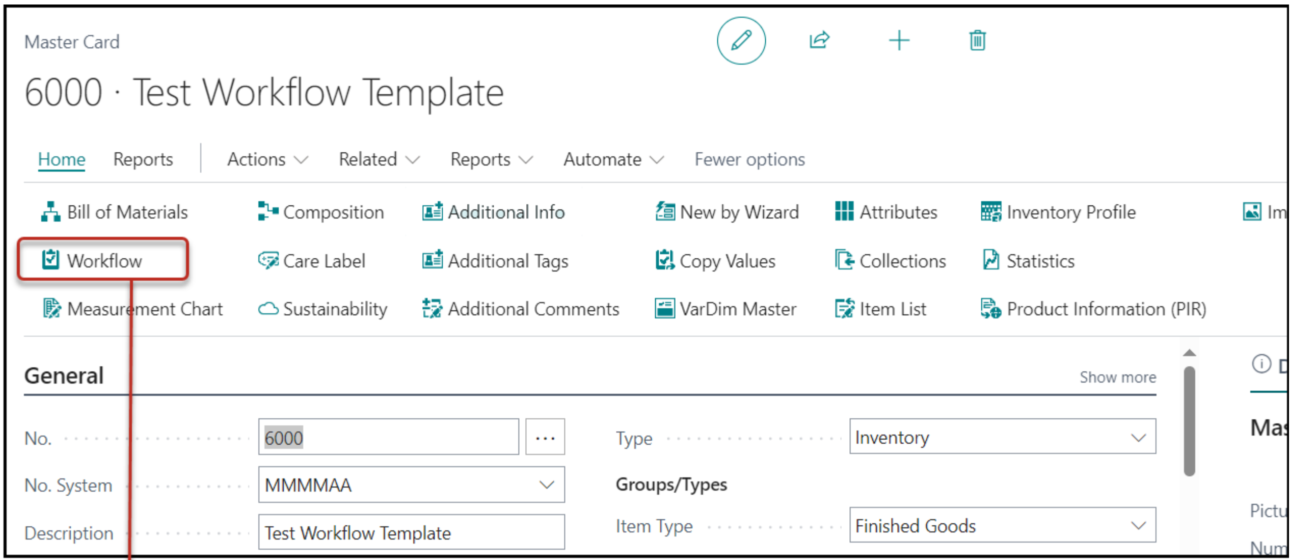
The only new field in this Workflow Template in comparison to a normal Workflow, is the **Deadline Date Formula**.

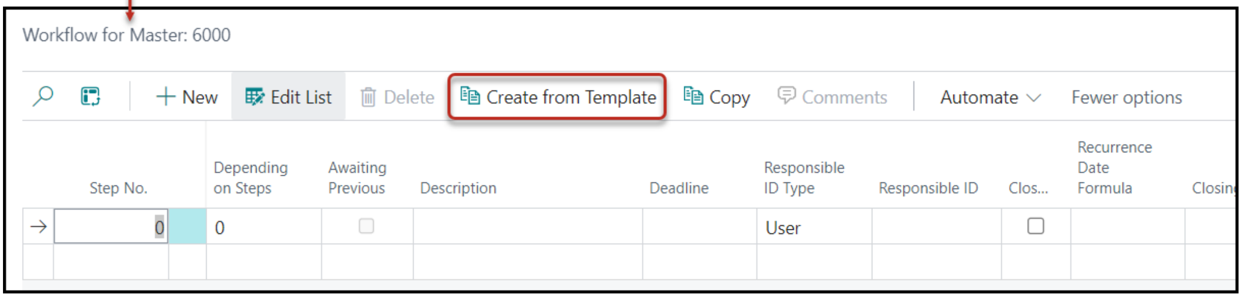
Deadline Date Formula

With the **Deadline Date Formula,** a Date is calculated based on a **Calculate from Date** that the user has to fill in applying a specific Workflow Template. This calculated Date will become the **Deadline** on the created Workflow Activity Lines based on the Workflow Template.

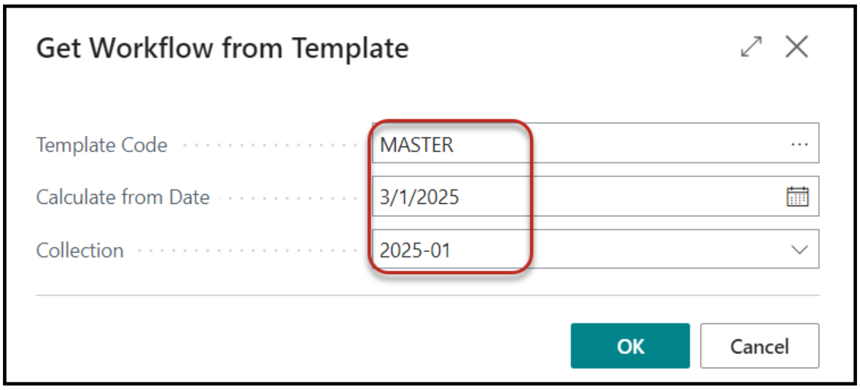
Applying a Workflow Template

Let us have a look at how a Workflow Template is used for creating a Workflow. In this example we want to create a Workflow on a Master, but it works the same for every entity. We will use the Template *MASTER* as shown in the picture in the paragraph above.





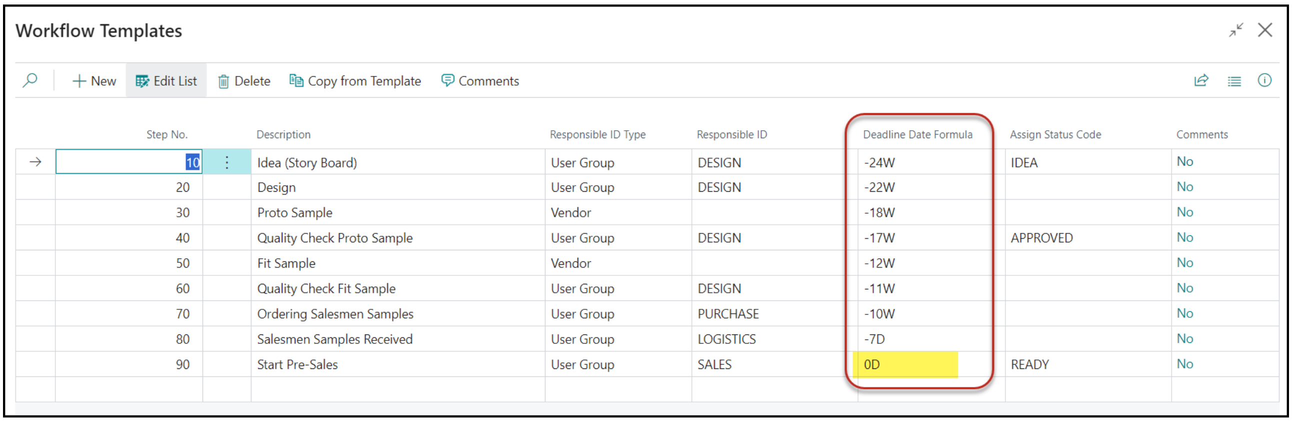
We first create a new **Master** and click ***Workflow***.
Then we click ***Create from Template*** to select the appropriate Workflow **Template Code**. We can only choose those Workflow Templates that have **Used for** *All* or *Master* – when creating a Workflow for a Master.



We also enter the **Calculate from Date** field. This is the Date that is used as a basis for calculating the **Deadlines** of the Workflow Activity Lines via the **Deadline Date Formula**.
The **Calculate from Date** is the *0D* of the Workflow Template Line and the other Deadlines will be calculated based on this *0D* and the **Calculate from Date.**

You can also enter a **Collection Code**; in that case, the **Collection Code** on the Workflow Activity Lines will be filled with this **Collection Code**.
So, the **Template Code** *MASTER* and the entered **Calculate from Date** and **Collection Code.**

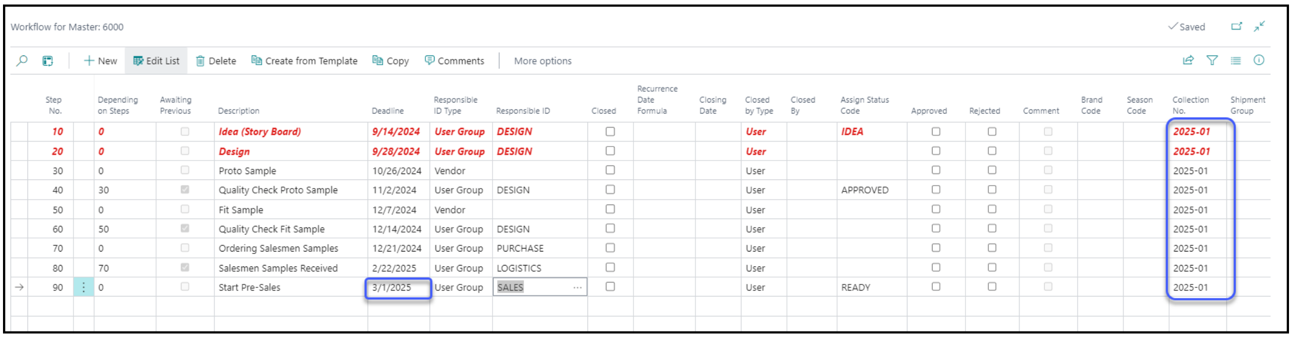
> **Note**
> If the Workflow is created by using a Workflow Template in a Sales-/Purchase Header with a **Collection No.** filled, this will also be shown in the **Get Workflow from Template** page, and therefore it will also be filled in the new created Workflow Lines.



Workflow Templates

Step No.	Description	Responsible ID Type	Responsible ID	Deadline Date Formula	Assign Status Code	Comments
10	Idea (Story Board)	User Group	DESIGN	-24W	IDEA	No
20	Design	User Group	DESIGN	-22W		No
30	Proto Sample	Vendor		-18W		No
40	Quality Check Proto Sample	User Group	DESIGN	-17W	APPROVED	No
50	Fit Sample	Vendor		-12W		No
60	Quality Check Fit Sample	User Group	DESIGN	-11W		No
70	Ordering Salesmen Samples	User Group	PURCHASE	-10W		No
80	Salesmen Samples Received	User Group	LOGISTICS	-7D		No
90	Start Pre-Sales	User Group	SALES	0D	READY	No

will result in the picture below.

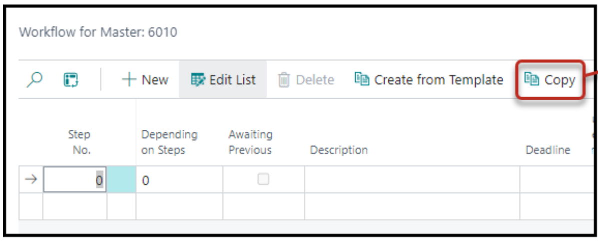


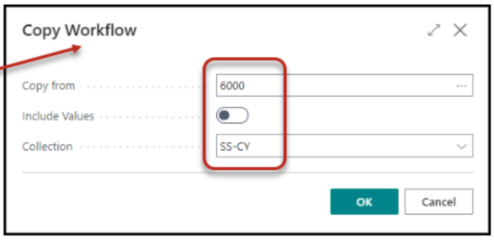
Workflow for Master: 6000

Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Recurrence Date Formula	Closing Date	Closed by Type	Closed By	Assign Status Code	Approved	Rejected	Comment	Brand Code	Season Code	Collection No.	Shipment Group
10	0	☐	Idea (Story Board)	9/14/2024	User Group	DESIGN	☐			User		IDEA	☐	☐	☐			2025-01	
20	0	☐	Design	9/28/2024	User Group	DESIGN	☐			User			☐	☐	☐			2025-01	
30	0	☐	Proto Sample	10/26/2024	Vendor		☐			User			☐	☐	☐			2025-01	
40	30	☑	Quality Check Proto Sample	11/2/2024	User Group	DESIGN	☐			User		APPROVED	☐	☐	☐			2025-01	
50	0	☐	Fit Sample	12/7/2024	Vendor		☐			User			☐	☐	☐			2025-01	
60	50	☑	Quality Check Fit Sample	12/14/2024	User Group	DESIGN	☐			User			☐	☐	☐			2025-01	
70	0	☐	Ordering Salesmen Samples	12/21/2024	User Group	PURCHASE	☐			User			☐	☐	☐			2025-01	
80	70	☑	Salesmen Samples Received	2/22/2025	User Group	LOGISTICS	☐			User			☐	☐	☐			2025-01	
90	0	☐	Start Pre-Sales	3/1/2025	User Group	SALES	☐			User		READY	☐	☐	☐			2025-01	

Copy (in the Workflow)

Besides using the **Workflow Templates,** you are also able to **Copy** the Workflow Activity Lines from another entity of the same Type.
I.e., for a Master Workflow, you can copy the Workflow Activity Lines from another Master.





Copy From

You can choose the Code of the Entity (in this case a Master) from which you want to copy the Workflow Activity Lines.

Include Values

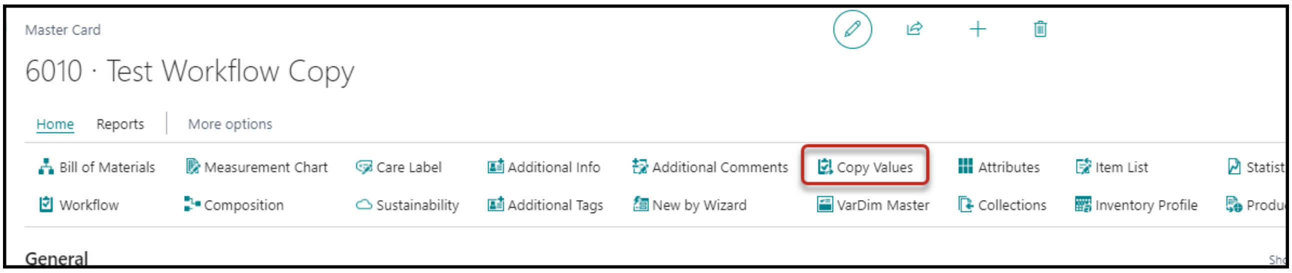
A checkmark in this option, will also copy the fields **Closed, Closing Date, Closed By, Approved, Rejected, Global Dimension 1** (Brand Code) and **Global Dimension 2** (Season Code).

Collection

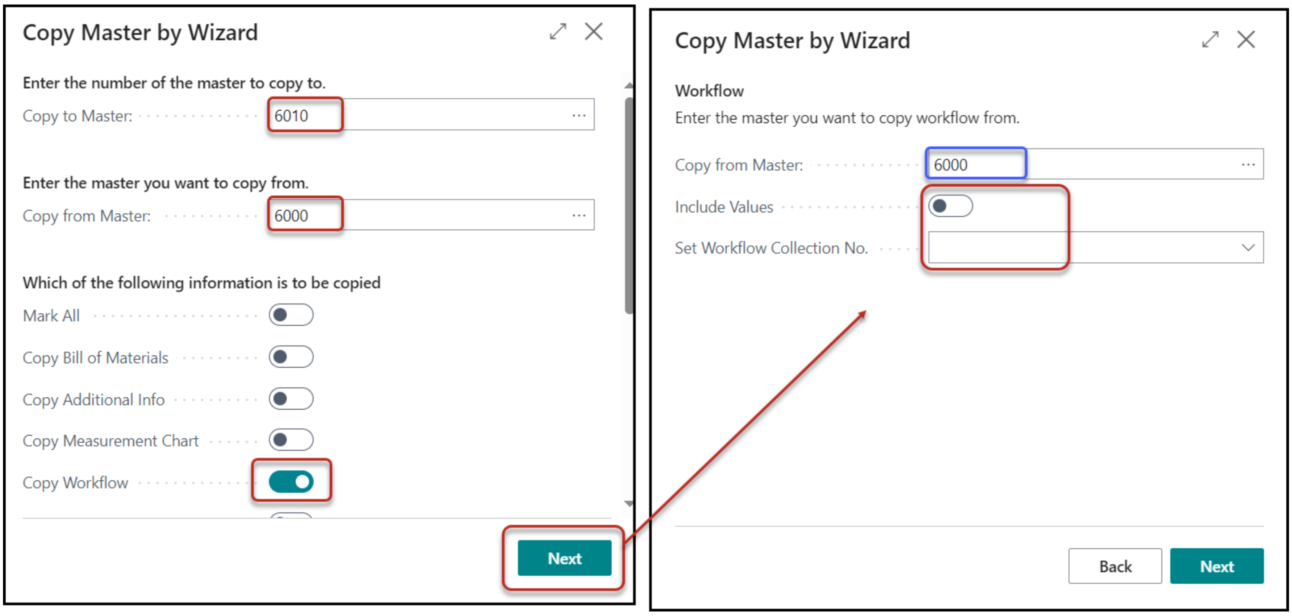
You can enter a **Collection** that will be filled in all the new created **Workflow Activity Lines**.
If the **Collection** is not filled, it will not copy the **Collection Code** from the **Copy from** Workflow Activity Lines.

Copy Values (in the Master)

In the Master List/Card you are also able to click **Copy Values**.

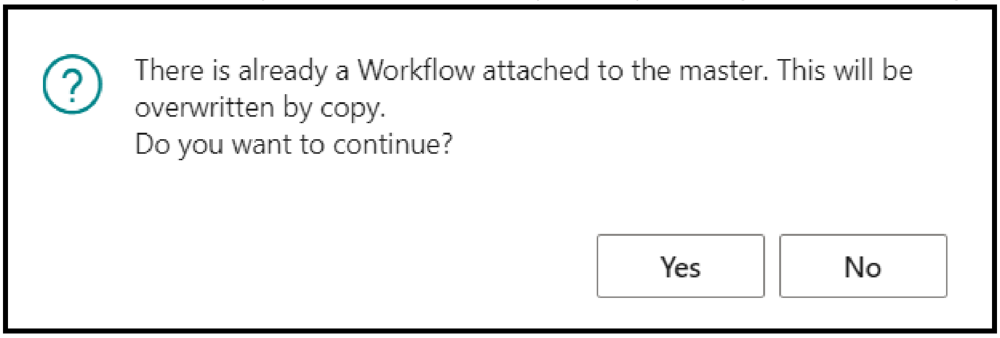


In that case, you get a dialog to determine which information you want to copy:



After clicking **Copy Values** a request page opens in which you can select from which Master you want to copy information to which another Master. In the example above we have set it up in such a way that the Activity Lines in the Workflow of Master *6000* will be copied into the Workflow of Master *6010*.

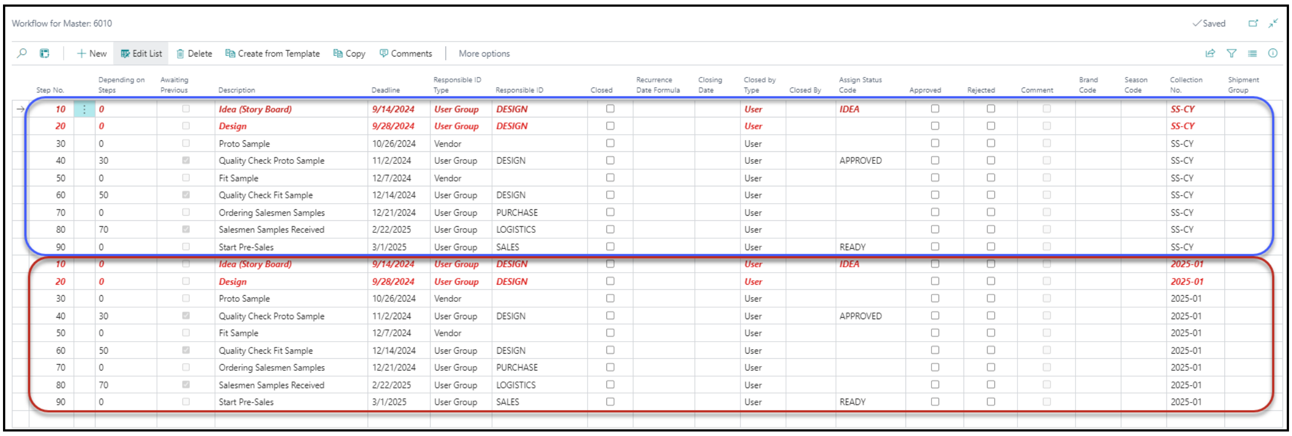
If Master *6010* already has Workflow Activity Lines, you will get an extra dialog:



Even when clicking **Yes**, it will not overwrite existing Workflow Activity Lines if the **Collection No.** in the **Copy from Master** Workflow (i.e., *SS-CY*) and the **Set Workflow Collection No.** (i.e., *2025-01*) are different; in that case, it will add the copied Lines.

After clicking **Next** another request page will open.
The **Include Values** and **Set Workflow Collection No.** have the same functionality as [Include Values] and [Collection] from the [Copy (In the Workflow)]

The result might like the picture below.


Workflow for Master: 6010 ✓Saved

New | Edit List | Delete | Create from Template | Copy | Comments | More options

Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Recurrence Date Formula	Closing Date	Closed by Type	Closed By	Assign Status Code	Approved	Rejected	Comment	Brand Code	Season Code	Collection No.	Shipment Group
10	0	☐	Idea (Story Board)	9/14/2024	User Group	DESIGN	☐			User		IDEA	☐	☐	☐			SS-CY	
20	0	☐	Design	9/28/2024	User Group	DESIGN	☐			User			☐	☐	☐			SS-CY	
30	0	☐	Proto Sample	10/26/2024	Vendor		☐			User			☐	☐	☐			SS-CY	
40	30	☑	Quality Check Proto Sample	11/2/2024	User Group	DESIGN	☐			User		APPROVED	☐	☐	☐			SS-CY	
50	0	☐	Fit Sample	12/7/2024	Vendor		☐			User			☐	☐	☐			SS-CY	
60	50	☑	Quality Check Fit Sample	12/14/2024	User Group	DESIGN	☐			User			☐	☐	☐			SS-CY	
70	0	☐	Ordering Salesmen Samples	12/21/2024	User Group	PURCHASE	☐			User			☐	☐	☐			SS-CY	
80	70	☑	Salesmen Samples Received	2/22/2025	User Group	LOGISTICS	☐			User			☐	☐	☐			SS-CY	
90	0	☐	Start Pre-Sales	3/1/2025	User Group	SALES	☐			User		READY	☐	☐	☐			SS-CY	
10	0	☐	Idea (Story Board)	9/14/2024	User Group	DESIGN	☐			User		IDEA	☐	☐	☐			2025-01	
20	0	☐	Design	9/28/2024	User Group	DESIGN	☐			User			☐	☐	☐			2025-01	
30	0	☐	Proto Sample	10/26/2024	Vendor		☐			User			☐	☐	☐			2025-01	
40	30	☑	Quality Check Proto Sample	11/2/2024	User Group	DESIGN	☐			User		APPROVED	☐	☐	☐			2025-01	
50	0	☐	Fit Sample	12/7/2024	Vendor		☐			User			☐	☐	☐			2025-01	
60	50	☑	Quality Check Fit Sample	12/14/2024	User Group	DESIGN	☐			User			☐	☐	☐			2025-01	
70	0	☐	Ordering Salesmen Samples	12/21/2024	User Group	PURCHASE	☐			User			☐	☐	☐			2025-01	
80	70	☑	Salesmen Samples Received	2/22/2025	User Group	LOGISTICS	☐			User			☐	☐	☐			2025-01	
90	0	☐	Start Pre-Sales	3/1/2025	User Group	SALES	☐			User		READY	☐	☐	☐			2025-01	

However, the **Deadline** is identical in both Workflows. This is fundamentally different from calculating the **Deadline** by the Date Formulas in the Templates.

Copy Workflow (in the Wizard)

When copying a Master to another Master by using the Wizard, you are also able to **Copy Workflow**. See ***White Paper –TRIMIT Wizard and Copy Info*** for more details.

So, it is up to the customer to decide whether the ***Workflow Templates, Copy, Copy Values*** or ***Copy Workflow*** function would be the right choice.

Manual Entry of Workflow Activity Lines

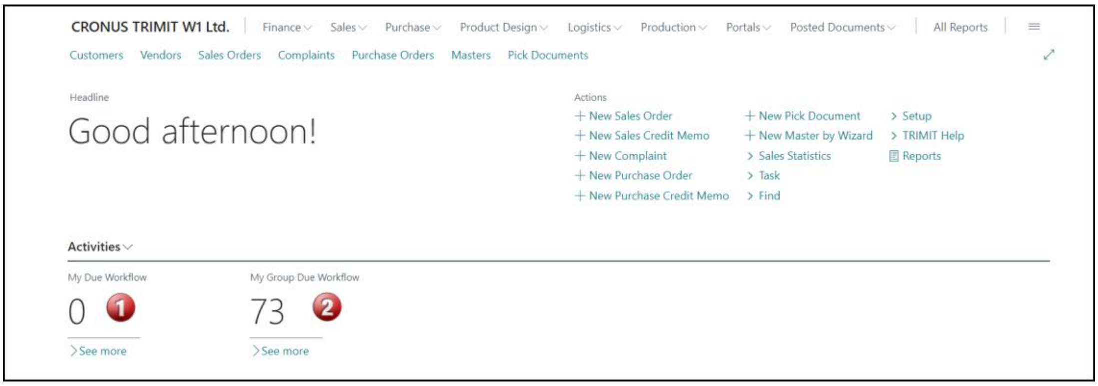
It is always possible to manually enter the Activity Lines in a Workflow. This way you are able to construct a Workflow completely from scratch, though this is not an advisable procedure. However, it is always possible to adjust a Workflow by manually enter or change Activity Lines in a Workflow.

Workflow Due List

With all the TRIMIT Workflows you might have entered in the system on different entities, it might become difficult to keep track of all the **Step Nos.** that you as a User or as member of a Workflow User Group are responsible for.
That is why you are able to see all the Workflow Step Nos. assigned to you as a User or as member of a Workflow User Group in several pages.

In the TRIMIT Role Centers

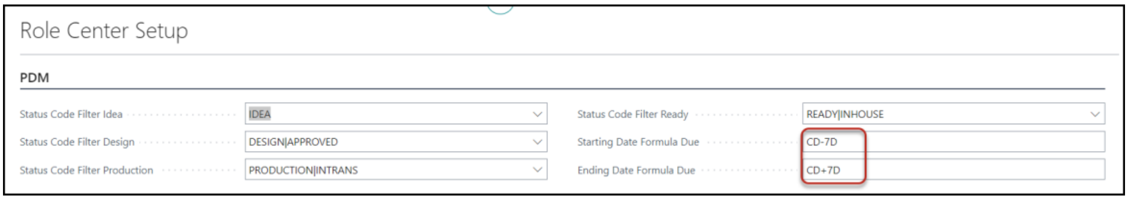
TRIMIT Small Business, TRIMIT Production, TRIMIT Portal Administrator

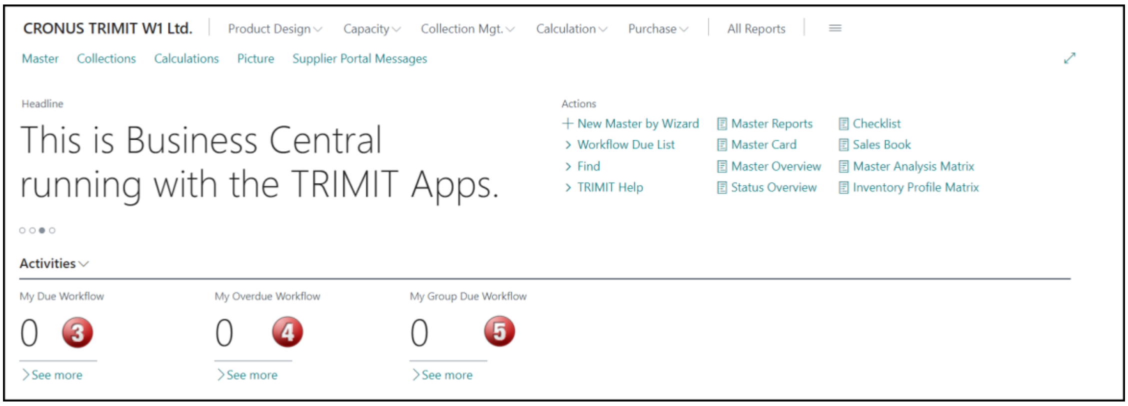


My Due Workflow: All Workflow Activity Lines that are not Closed, **Responsible ID** is the User, **Deadline** is before the current Work Date.
My Group Due Workflow: All Workflow Activity Lines that are not Closed, **Responsible ID** is a Workflow User Group that is in the User Setup of the current User, **Deadline** is before the current Work Date.

TRIMIT PDM/Design

In this Role Center, also the setups in the **Role Center Setup** are taken into consideration to determine the Workflow Activity Lines of the stacks.



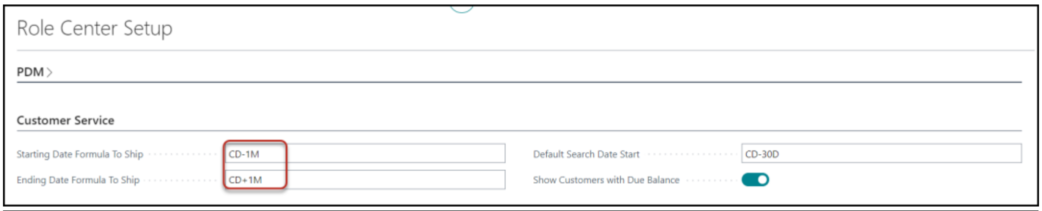


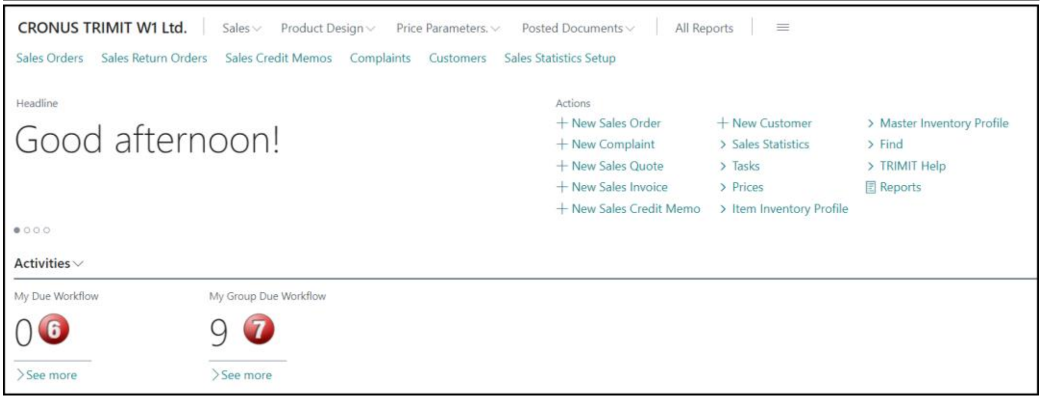
My Due Workflow: All Workflow Activity Lines that are not Closed, **Responsible ID** is the User, **Deadline** is between the **Starting Date Formula Due** and the **Ending Date Formula Due** from the Role Center Setup.

My Overdue Workflow: All Workflow Activity Lines that are not Closed, **Responsible ID** is the User, **Deadline** is before the **Starting Date Formula Due** from the Role Center Setup.
My Group Due Workflow: All Workflow Activity Lines that are not Closed, **Responsible ID** is a Workflow User Group that is in the User Setup of the current User, **Deadline** is between the **Starting Date Formula Due** and the **Ending Date Formula Due** from the Role Center Setup.

TRIMIT Customer Service

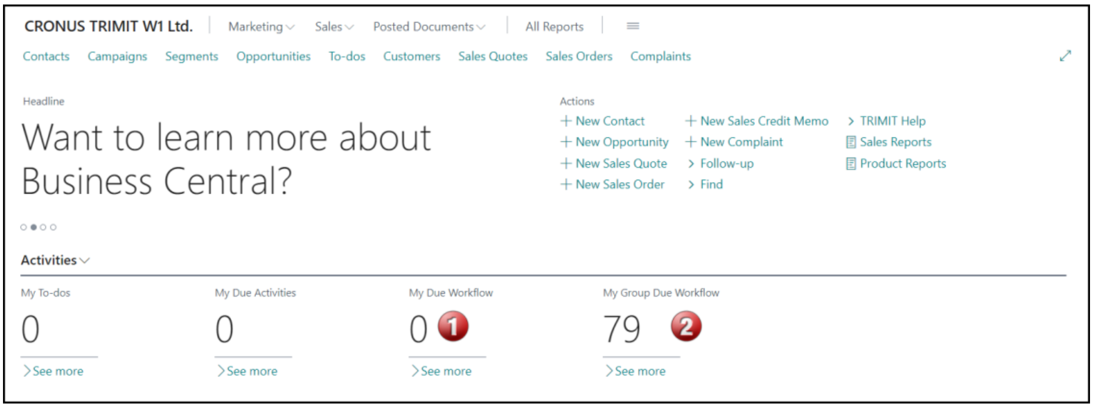
In this Role Center, also the setups in the **Role Center Setup** are taken into consideration to determine the Workflow Activity Lines of the stacks.





My Due Workflow: All Workflow Activity Lines that are not Closed, **Responsible ID** is the User, **Deadline** is between the **Starting Date Formula To Ship** and the **Ending Date Formula To Ship** from the Role Center Setup.
My Group Due Workflow: All Workflow Activity Lines that are not Closed, **Responsible ID** is a Workflow User Group that is in the User Setup of the current User, **Deadline** is between the **Starting Date Formula To Ship** and the **Ending Date Formula To Ship** from the Role Center Setup.

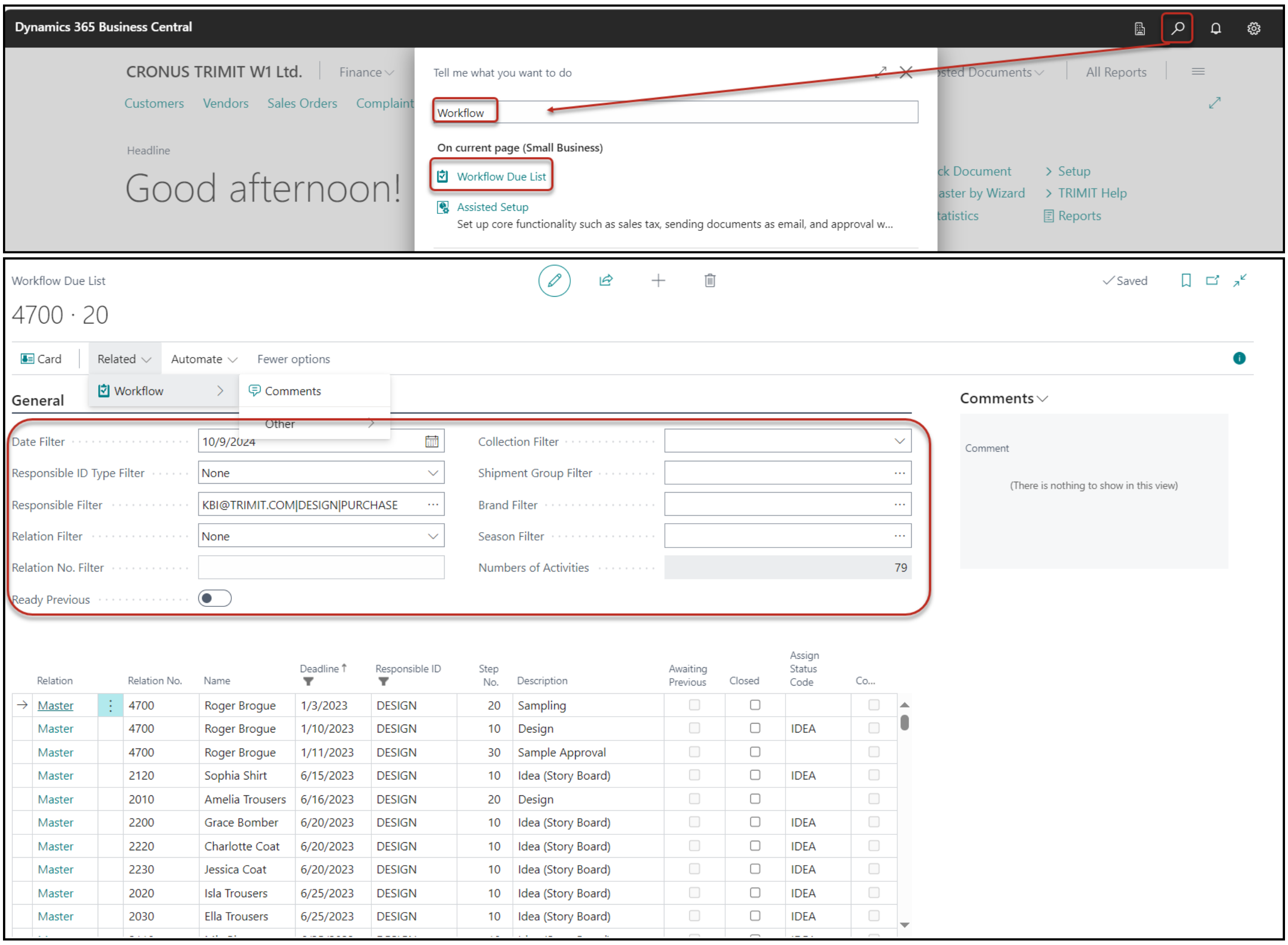
TRIMIT CRM



The same as in [TRIMIT Small Business, TRIMIT Production, TRIMIT Portal Administrator](#).

Separate Page for Workflow Due List

Via **Search** *Workflow*, you can find the **Workflow Due List**.



This will show all the Workflow Activity Lines based on all the Filters in ***General.***

You can change all the Filters to see other Lines.

When clicking ***Card***, you will see the Card of the **Relation + Relation No.** I.e., a Master Card or a Sales Order Card, etc. depending on the **Relation** from the Line that you are standing on.

When clicking ***Comments***, you will see the Comments entered for current Line, which can be changed/added.

In this page, you are also able to set checkmarks in **Closed**, and therefore close many **Step Nos.** over many different **Relation + Relation Nos.** from one page, instead of opening every individual Workflow.

Limitations of the TRIMIT Workflow

In this chapter the limitations of the TRIMIT Workflow functionality are discussed.

No Calendar

The calculation of the **Deadline** in the Workflow will not take any Calendar in consideration. You will have to consider that Workflow Activity Lines could be assigned to Users or User Groups in different countries with different Calendars. It could also be the case that a specific activity is ignoring the local Calendar.

No recalculation Deadline

It is quite common that the Deadline on an Activity Line changes. However, that would not necessarily influence the Deadlines on other Activity Lines. It might, but also it might not. For instance, the boat from China will leave anyway whether the goods have been arrived in the Harbor or not. This means that you have to manually change the Deadlines of all Activity Lines influenced by the changed Deadline.

Workflows do not form a netted Structure

You can imagine a situation that you have an Activity Line on a Workflow approved, for instance a lab-dip[1] of a fabric is approved, so this could mean that related Activity Lines on all Masters that contain this fabric should be approved as well.
The TRIMIT Workflow does not have the possibility to have a netted structure that supports this.

No Actions on Workflow Activity Lines

The Workflow is a task management tool. Approval of an Activity Line does not activate a certain action.

[1] A Lab-dip is a small piece of Fabric that is used for Laboratory testing on for instance tearing strength, color fastness, rubbing, pilling, and shrinking.