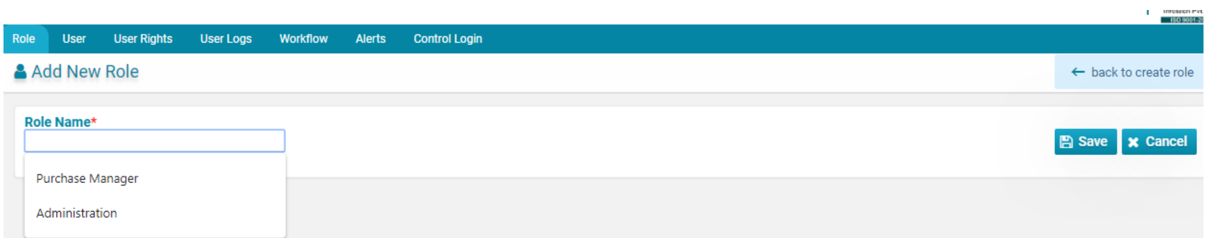
HIGHRISE ADMINTOOL

Chapter 1

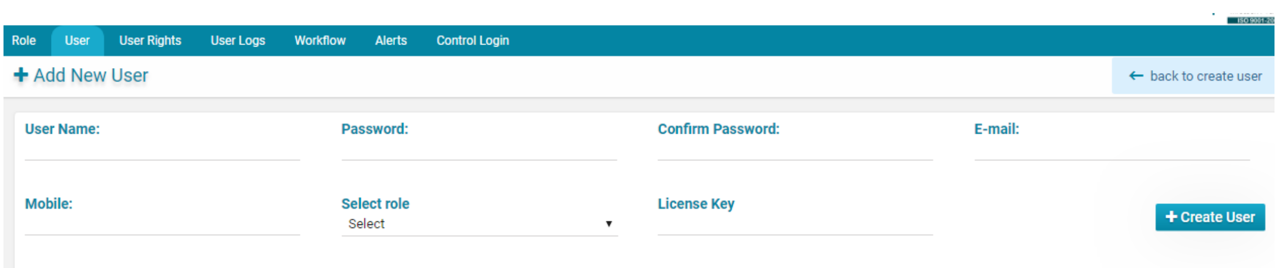
Step 1) Create Role:

- Go to – Admin module – Role.
- Click on **Add**.
- Click on **Save**.



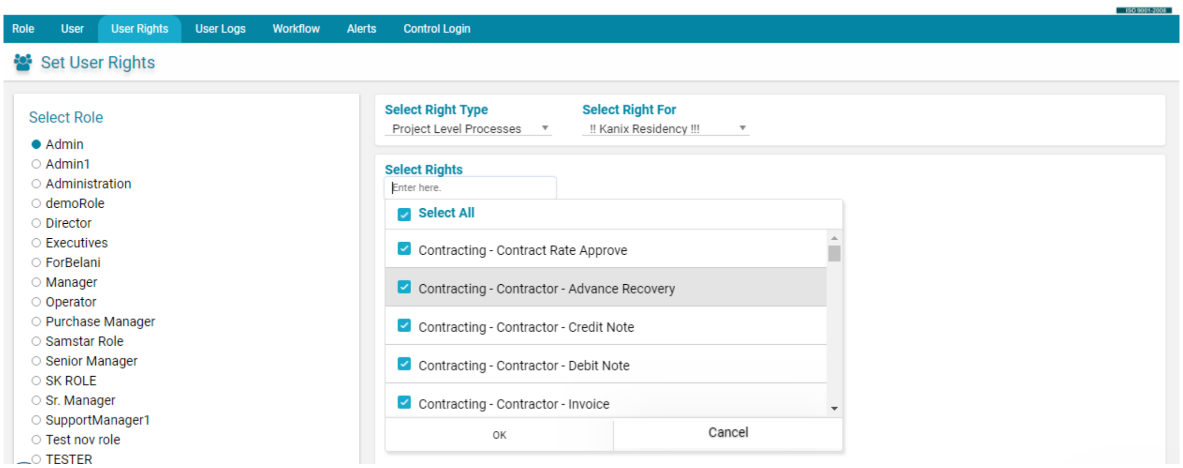
Step 2) Create User:

- Go to – User.
- Click on **Add.**
- Fill the details and click on **Create User**



<u>Step 3) User Right:</u>

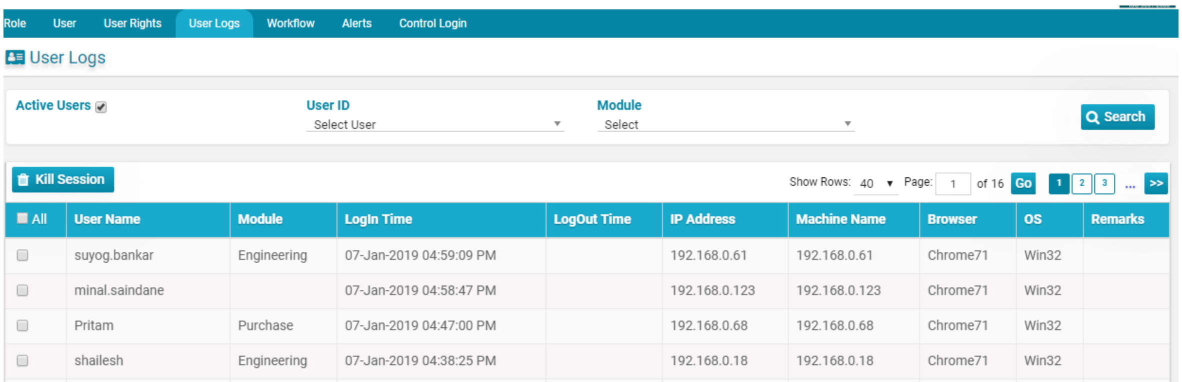
- Select **Role**.
- Select **Right Type.**
- **Select Rights**, which you want to assign to, selected Role.
- Click on **OK** then **SAVE** it**.**



- Process rights need to be configured Project wise from **Project Level Processes**.
- Menu Rights need to be configured module wise.
- Accounts process rights need to be configured Company Wise from **Company Level Processes**.

Step 4) User Logs:

User Logs shows login details of users. It can be browsed user wise or module wise. It has a provision to Kill user.



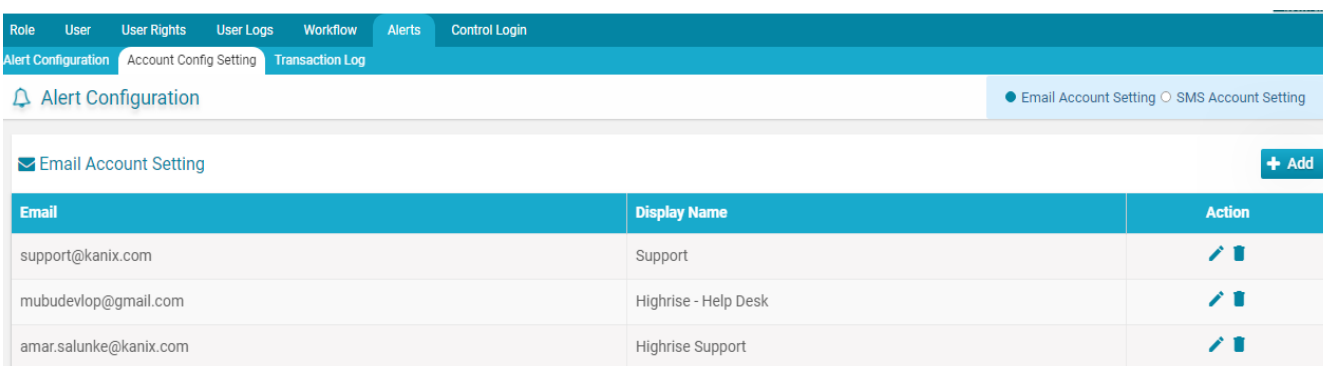
All	User Name	Module	Login Time	LogOut Time	IP Address	Machine Name	Browser	OS	Remarks
	suyog.bankar	Engineering	07-Jan-2019 04:59:09 PM		192.168.0.61	192.168.0.61	Chrome71	Win32	
	minal.saindane		07-Jan-2019 04:58:47 PM		192.168.0.123	192.168.0.123	Chrome71	Win32	
	Pritam	Purchase	07-Jan-2019 04:47:00 PM		192.168.0.68	192.168.0.68	Chrome71	Win32	
	shailesh	Engineering	07-Jan-2019 04:38:25 PM		192.168.0.18	192.168.0.18	Chrome71	Win32	

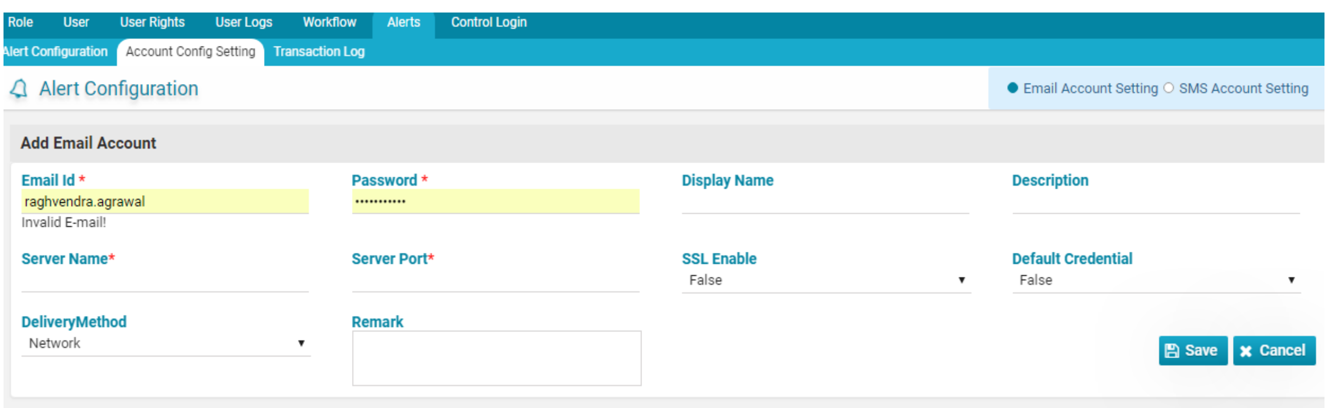
<u>Chapter 2</u>

1) <u>Account Config Setting:</u>

- Select Email/SMS Account Linking.
- Click on **Add**.
- Fill the details and **Save**.

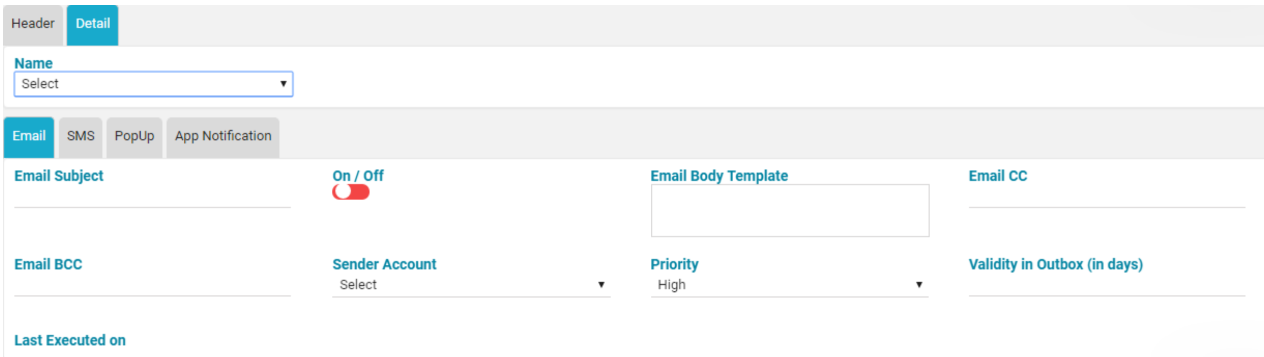
Email : Email Account through mails will be generated.
Display Name: Display Name on Mail.
Server Name: SMTP Server Name
Server Port: Outgoing Port





2) <u>Alert Configuration:</u>

- Click on **Add**.
- Select event from dropdown**(Name)**
- Fill the details and **Save**.



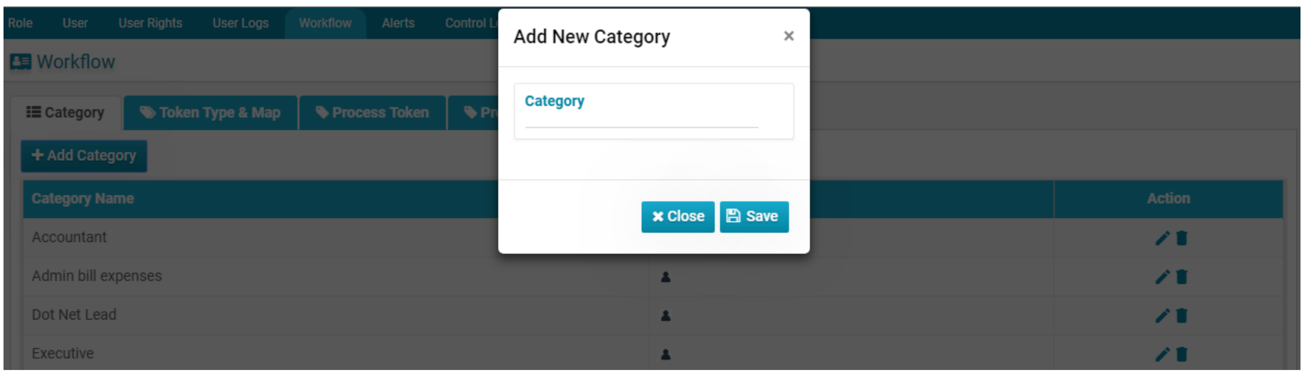
- Email Subject : Subject of email of particular event.
- On/Off: Select it for ON event then it will be in Green Color.
- Prepare mail body template.
- Same process for SMS, PopUp and App Noification.

Chapter 3

Step 1) Create Master of user categories:

The workflow module of Highrise is used for multi-level approval for different processes in Highrise ERP software. It works on role basis responsibilities rather than user base. So you have to define first categories to which any document would send for approval. The categories are defined in admin module.

- Go to – Admin module – workflow menu – select category menu.
- Click on Add Category.
- Type Category (role) name.
- Click on Save.
- Repeat process for adding new category.

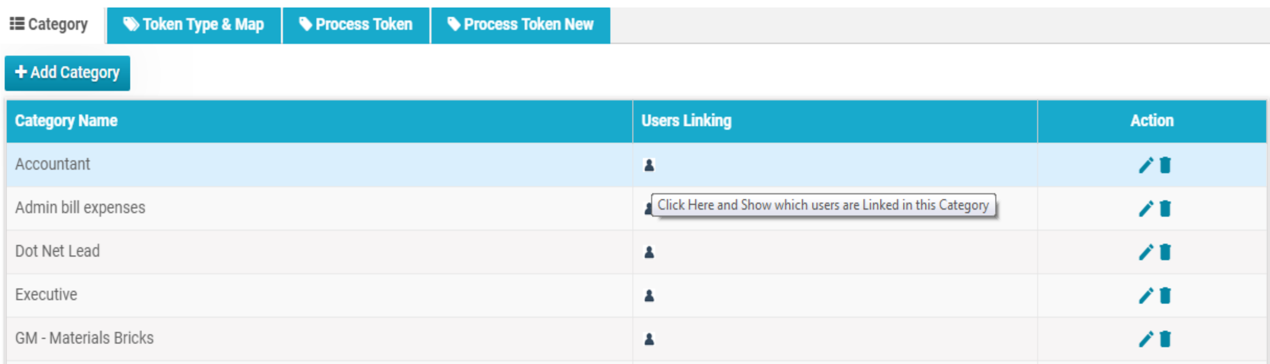


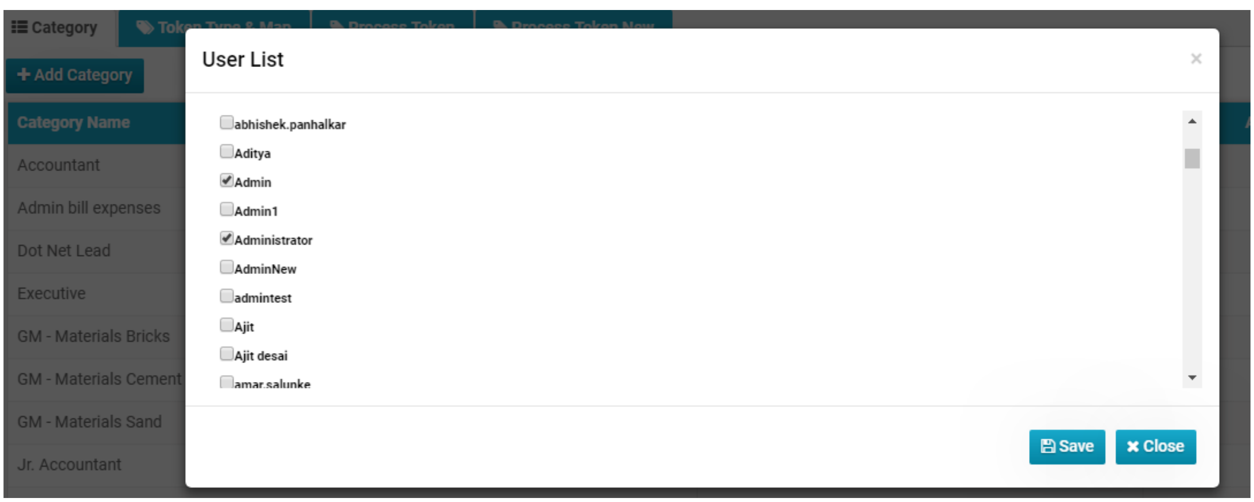
AdminTool/Workflow/Category

Step 2) Assign user category:

Users in admin module need to be assigned to respective categories. All the users including those who may be just creators of token document that need to be approved in workflow shall also be added to respective category.

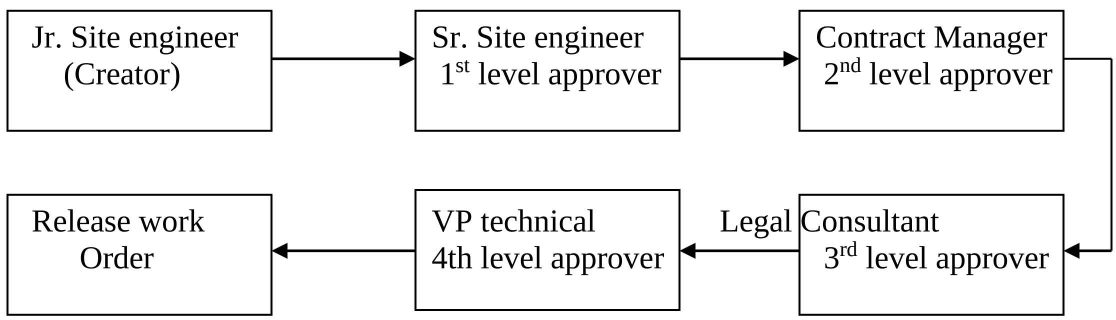
- Go to – Admin module – workflow menu – user linking.
- Select user linking and check mark user whom you want to link with selected category.





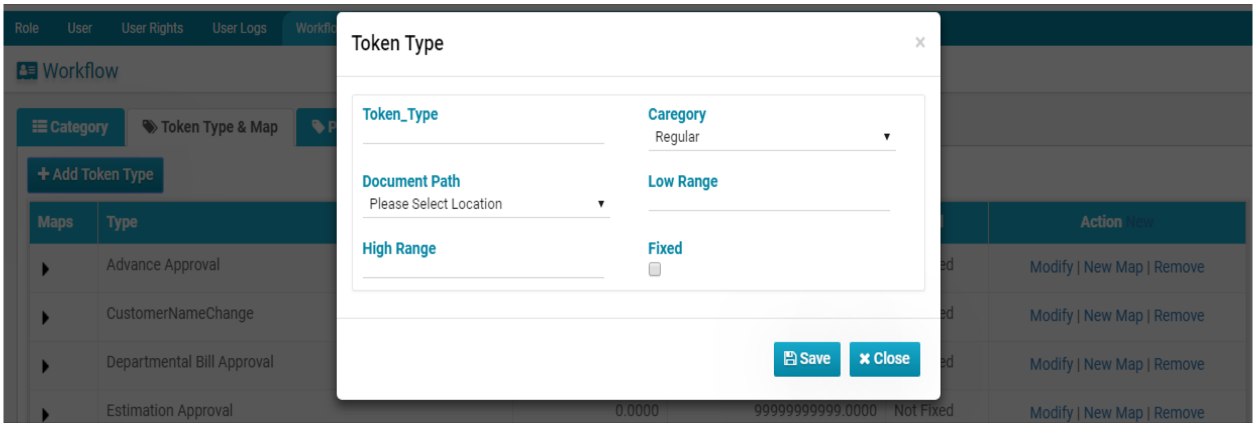
Step 3) Create token approval Map:

Any token document such as work order, purchase order, etc. if to be approved by multi-level users then a process map need to be defined for that type of token document.
To understand this let us take an example for Work Order.
In this example the Work Order generated from Highrise will require 4 level approvals as shown in below diagram for Project 1.



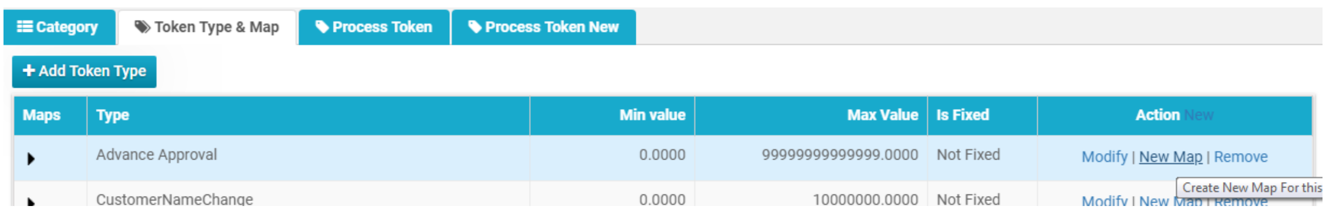
In the above case ***Work Order*** is a ***Process*** and each work order number generated from Highrise ERP is a token. Approval for the generated token can be configured by the user to multi-level hierarchy varying from project to project i.e. for some other project the approval may be required only for initial 2 levels. Also above approval maps can be set based on value of work order. If the value of work order increases more than 1 crore then it will go to director for approval in such case the separate map with value range need to be defined.

- Go to – Admin module – workflow menu – Token map.
- Click on Add Token type.
- Type details of token type name
- Select document path where all pdf files generated from workflow to be uploaded.
- Enter value range low to high for which the defined map is applicable.
- Click on save.



AdminTool → Workflow→ Token Type & Map

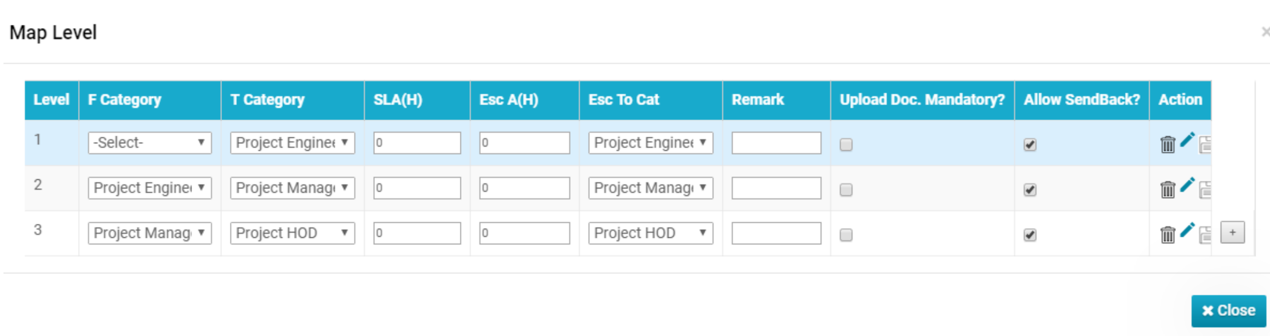
- Click on Add Token type.



AdminTool → Workflow→ Token Map

- System will generate new MAP Id. Click on new generated map id.
- Click on (+)add row.
- Go on selecting 'To category' to which the token shall go after approval from 'From category' user.
- If you wish you can assign minimum days in which To category user shall approve the token i.e. SLA days.

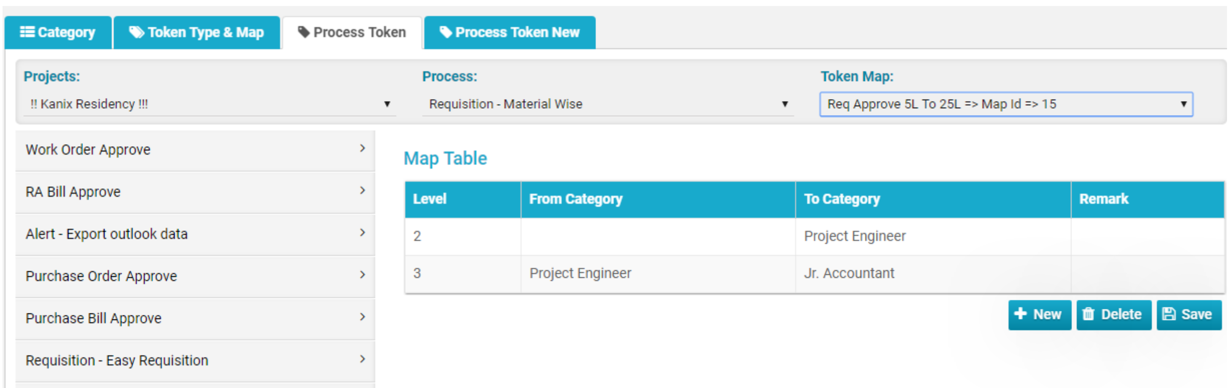
Click on save



Step 4) Assign workflow map to project.

Highrise workflow facilitates to have different level approval flow to different projects. In turn you can assign each project a separate type of workflow map even for same type of process token.

- Go to – Admin module – workflow menu – Process Token.
- Click on New and Select Project and Process.
- Select required token map and click on save.
- Use delte to remove unused map.



<u>Step 5) Send Token document to workflow:</u>

If Highrise workflow module configuration is on and the process map is assigned to a process (i.e. requisition, purchase order, work order, purchase bill and RA bill) for required project then on doing below actions a token would be generated and send to approval as per approval flow assigned to that project and process.

Token would be generated for

1) Requisition on approval of requisition from Highrise purchase module.
2) Purchase order on save of purchase order from Highrise purchase module.
3) Purchase bill on save of purchase bill from Highrise purchase module.
4) Work order on approval of work order from Highrise contracting module.
5) RA bill on save of RA bill from Highrise contracting module.

For generation of above tokens user need to follow regular process of save or approve. Below requisites shall be complied before starting generation of tokens. One should follow below guidelines before starting use of workflow – first time as well as when new user or new project or for new process map is created.

1) Check that all users (including creators - who would create tokens from Highrise regular module) are added to at least one workflow category.
2) Check that required token map is created and proper categories are assigned in it. For defined token map ensure that ***proper document path*** as well as ***value range*** (amount range for which token map is applicable) is assigned. Document path and value range is mandatory for generation of successful tokens. Note that the document path created shall be shared to all users with read/write rights and should be accessible from any user system. Use below document path id for different token maps –

a) Requisition – 24) Requisition workflow
b) Purchase order - 5) PO workflow
c) Purchase bill – 6) Pbill workflow/approval
d) Work order – 2) Work order workflow/approval
e) RA bill – 3) RA bill workflow/approval

3) Check that in process token window proper process name is selected while assigning token map. Use below processes for different tokens –

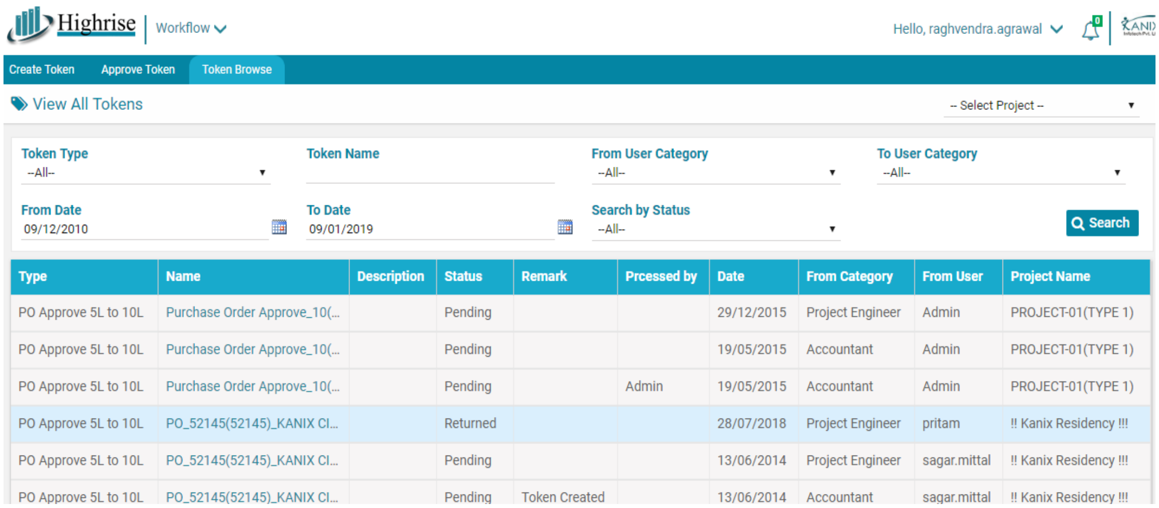
a) Requisition – Requisition workflow
b) Purchase order - Purchase order approve
c) Purchase bill – Purchase bill approve
f) Work order – Work order approve
g) RA bill – RA bill approve

4) Check that all creators are able to generate PDF for token documents from their login on their systems. For users who create PO/ Pbill/ RA bill and who approve requisition/WO shall be able to generate PDF for respective documents.

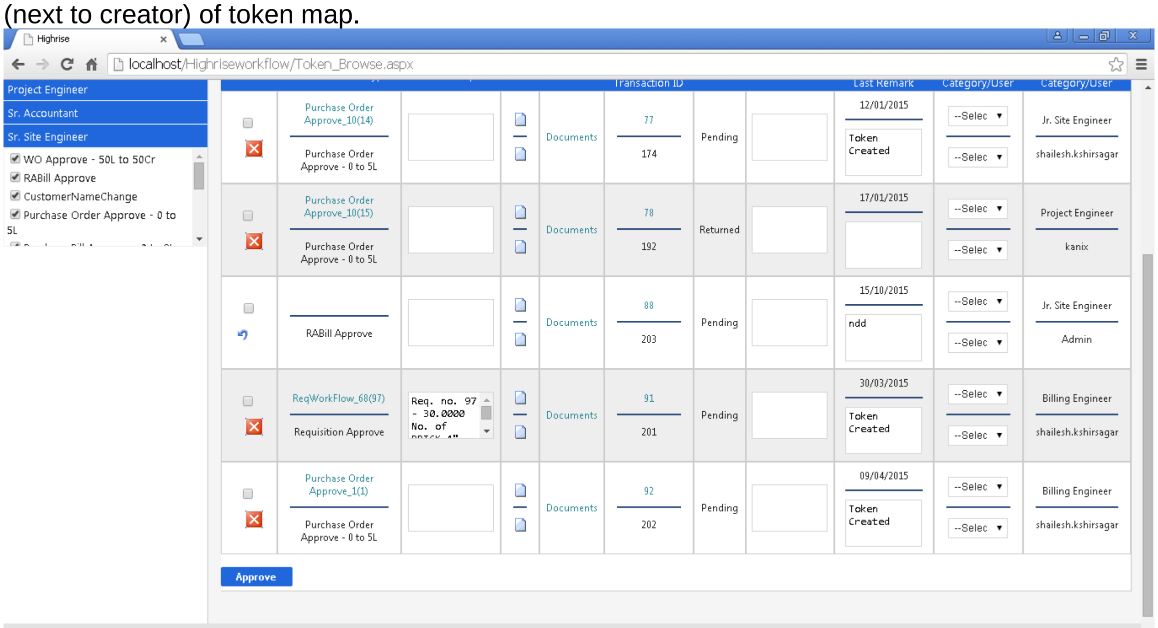
5) Create user name and password of users who will use workflow. The username and password will be used from web module only. All concern users need to be created in both desktop and web admin module.

<u>Step 6) Login to workflow module</u>

For approving any token user need to login to web workflow module. After login on left side user will get categories in which he is working. On selection of particular category he will get list of token map for which tokens are pending for his approval.

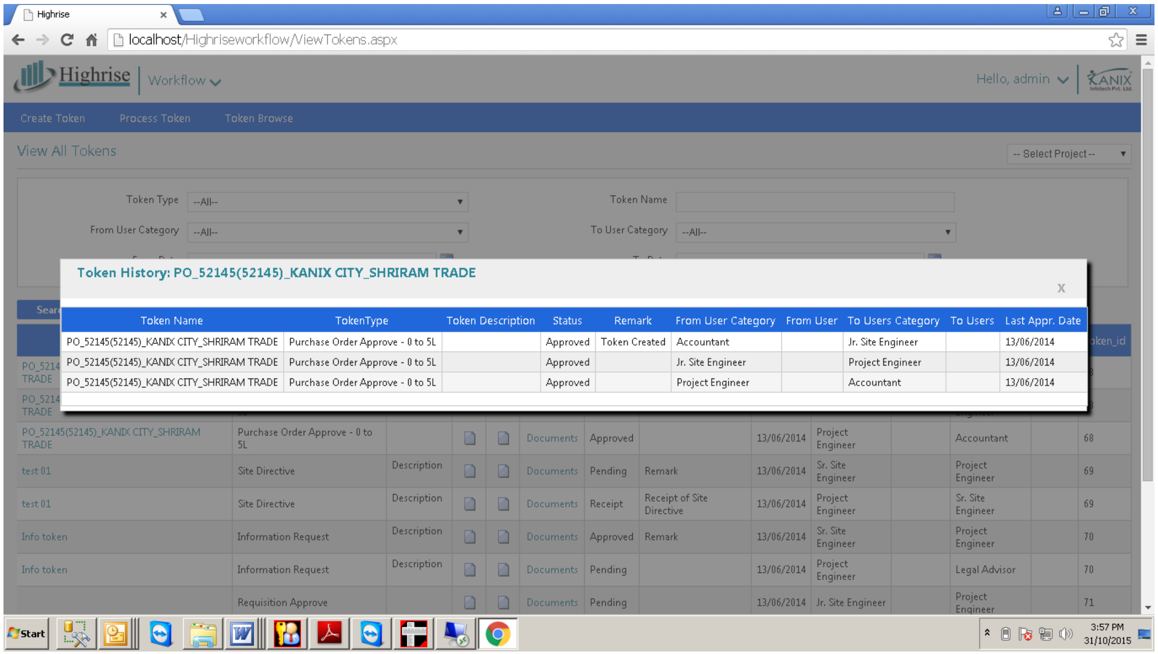


User can further click on search to get list of tokens pending for approval based on selected criteria of project and date range. Select check box of tokens and click on approve for approval of tokens. Use send back button to send token back to previous level. The remarks can be given against each token approval. The token can be closed only by 1st approver (next to creator) of token map.



Step 7) Token browse and Token history:

All previous tokens can be browsed / viewed from token browse based on available different filters. On clicking single token, the token history can be viewed.



Advantages of Work Flow Module

• With Workflow Process Compliance becomes mandatory – The process dose not get complete or proceeds till assigned user dose not indicate his/her approval. By indicating the approval the users owns the responsibility of the action. The approval process can be set based on value hence allows responsibility sharing.
• Delegation becomes controlled.
• Dependency only on MIS reports is reduced and Management can get into a deeper role in areas of concern by plugging themselves in approval chain.
• Since the module is web-based, user can participate in the process from any part of the world; the dependency of being in office to forward approvals is eliminated.
• Email/SMS alerts can be sent to the user for approvals pending for more than “X’ days. The “X” can be configured by the user.
• Since the entire design is “Role Based” and not “User Based” changing roles and responsibilities happens seamlessly.

THANK YOU