

The Budget Workflow Manager App

White Paper – July 2015 Sneak Peek

Introduction

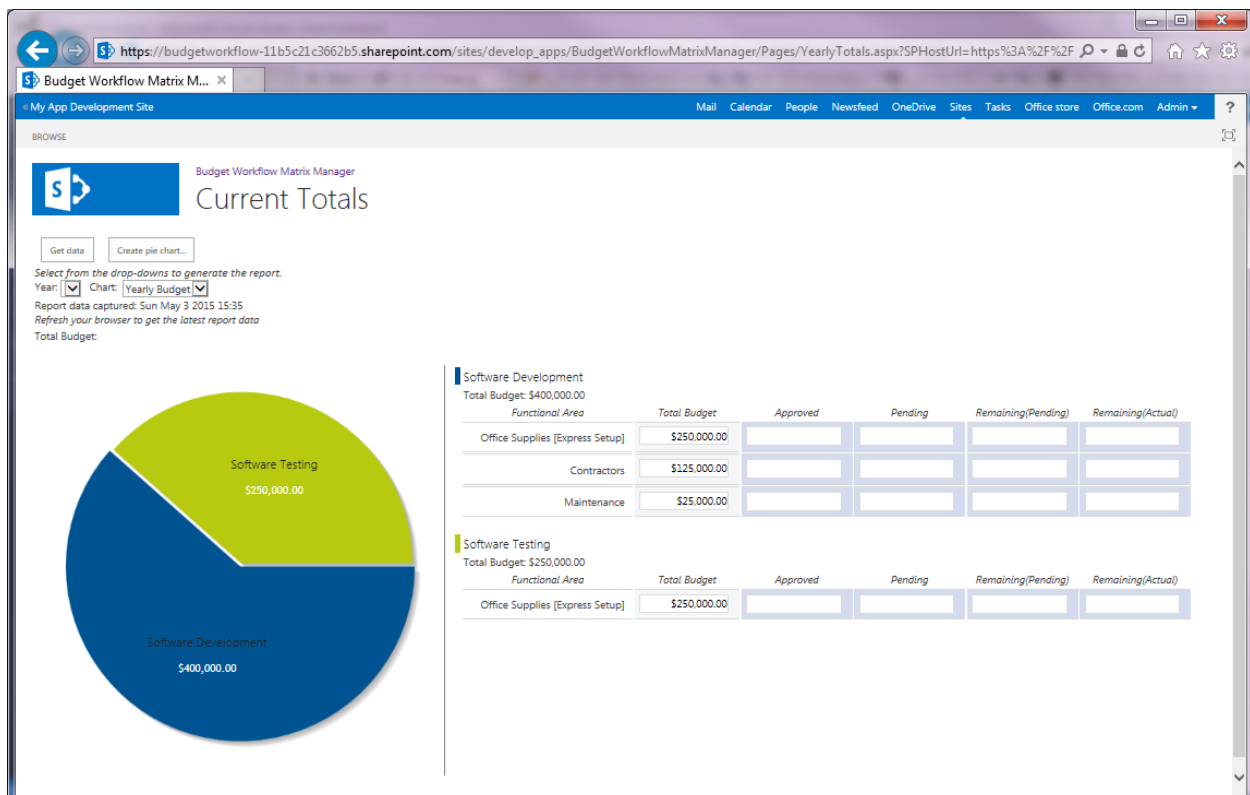
The Budget Workflow Manager is a SharePoint App that unifies all of the Budget Workflow App or Core Workflow App deployments in your SharePoint 2013 Farm (on premise) or Tenant (Office 365).

This unification of your Budget Workflow Apps provides real-time procurement, capex/opex and/or quoting reporting for your whole organization.

Current Totals

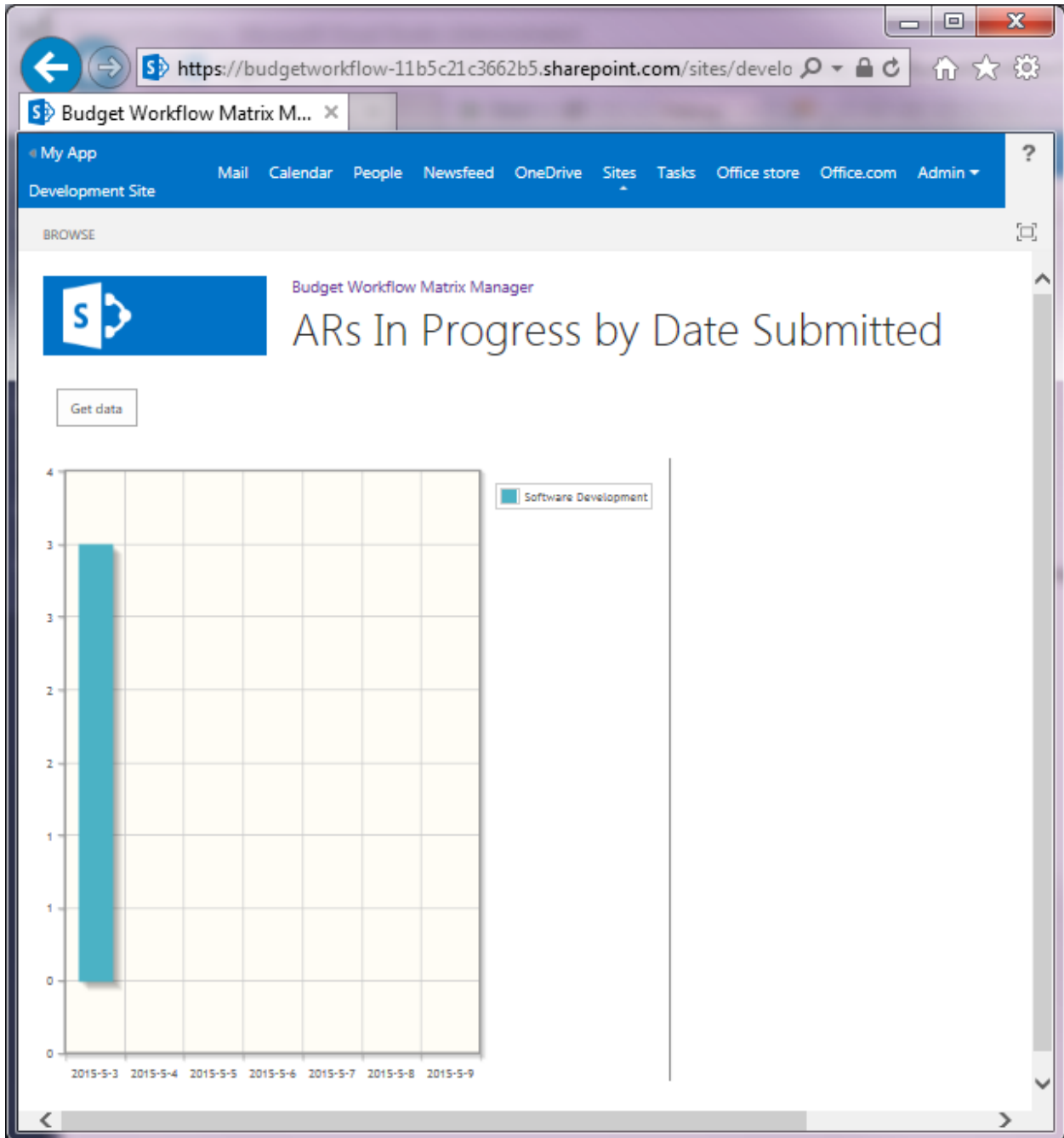
This page of the Budget Workflow Management App is the Home page of the app, and displays a summary of the connected Budget Workflow Apps.

In this example, two Budget Workflow Apps are being displayed (Software Development, Software Testing). In other scenarios, the naming of the Budget Workflow Apps could be something like “Plant 5”, “Human Resources”, or any structure which fits into your organization and you wish to manage as a separate unit.



ARs in Progress by Date Submitted

This page of the Budget Workflow Management App displays all of the currently active ARs (ARs that are In Progress). This particular screenshot shows the ARs in a 7 day timeframe. Note this screenshot only shows one connected Budget Workflow App (in development, more to follow). This bar chart shows that 3 ARs are in progress on May 3, 2015.



Use Case: Budget Workflow architecture at “Pretend Manufacturing Co.”

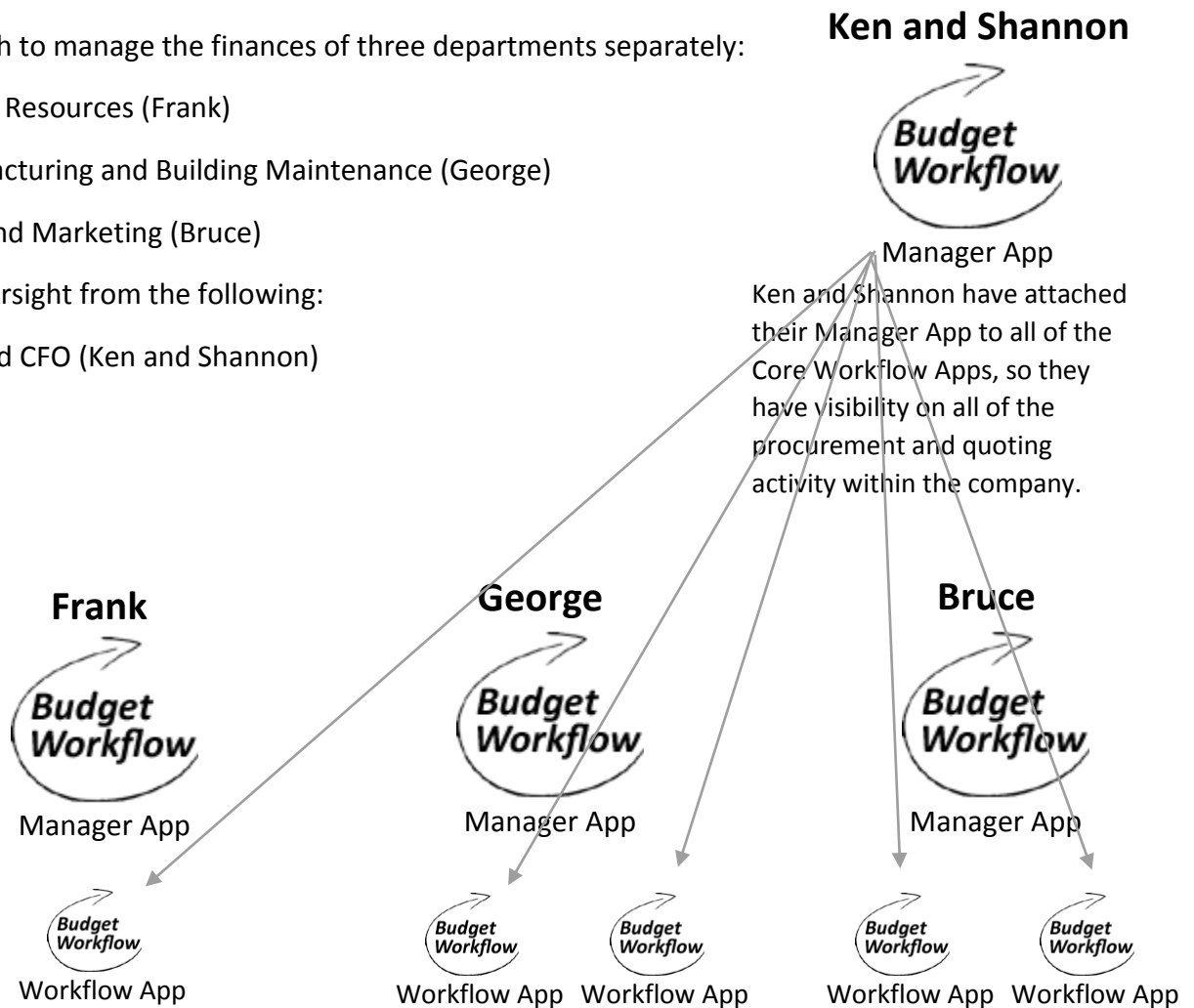
They have a SharePoint 2013 farm on premises (or Office 365, we don’t know, and it doesn’t matter).

They wish to manage the finances of three departments separately:

- Human Resources (Frank)
- Manufacturing and Building Maintenance (George)
- Sales and Marketing (Bruce)

With oversight from the following:

- CEO and CFO (Ken and Shannon)



Frank has deployed the Manager App to his Human Resources site in SharePoint. He has also deployed the Core Workflow App to the Human Resources site. Members of the Human Resources site will use the Core Workflow App to manage procurement within Franks department.

George has deployed the Manager App to his Manufacturing site in SharePoint. He has also deployed the Core Workflow App to the Plant Floor and Building Maintenance sites. Georges people will use the Core Workflow App to manage procurement within the departments, and George will be able to manage both of his departments from the single Manager App.

Bruce has deployed the Manager App to his Sales and Marketing sites in SharePoint. He has also deployed the Core Workflow App to these sites. Bruces people will use the Core Workflow App to manage procurement within the departments, and the Sales department will also use the quoting functionality to collaborate with the engineers in order to provide accurate and timely quotes to customers.

George will be able to manage both of his departments from the single Manager App.

How to Connect the Budget Workflow Apps to the Manager App

The configuration is easy. This requires version 1.0.1.1 or greater of the Budget Workflow App(s).

Much more to come as we prepare for our Summer 2015 release!