

8.2 Activating an Advanced Process - Managing Installation Renewals

Now let's proceed with the vision of the process in action.

We then create a new installation by entering the required information (see Figure 1).

Creating Asset

SaveCancel

Asset Information

Asset No

AUTO GEN ON SAVE

Serial Number

1234567898765

Date Sold

10-04-2025

(dd-mm-yyyy)

Status

In Service

Invoice Name

Search...

Shipping Tracking Number

Customer Name

demoVTENEXT

Next installation renewal date

03-07-2025

(dd-mm-yyyy)

Product Name

Vte Single User Pack

Assigned To

Useradmin@vtenext.com (User)

Date In Service

10-04-2025

(dd-mm-yyyy)

Tag Number

Shipping Method

Asset Name

Configuring Vte Single User Pack

Sales Order

Search...

Reason for Renewal Refusal

Figure 1

After saving, the process will start by positioning itself on the timer to wait for the “Next renewal expiration date” to be reached (26-02-2022).

In fact, by observing the process graph, we can see that the timer in the diagram is surrounded by a blue outline. (see Figure 2)

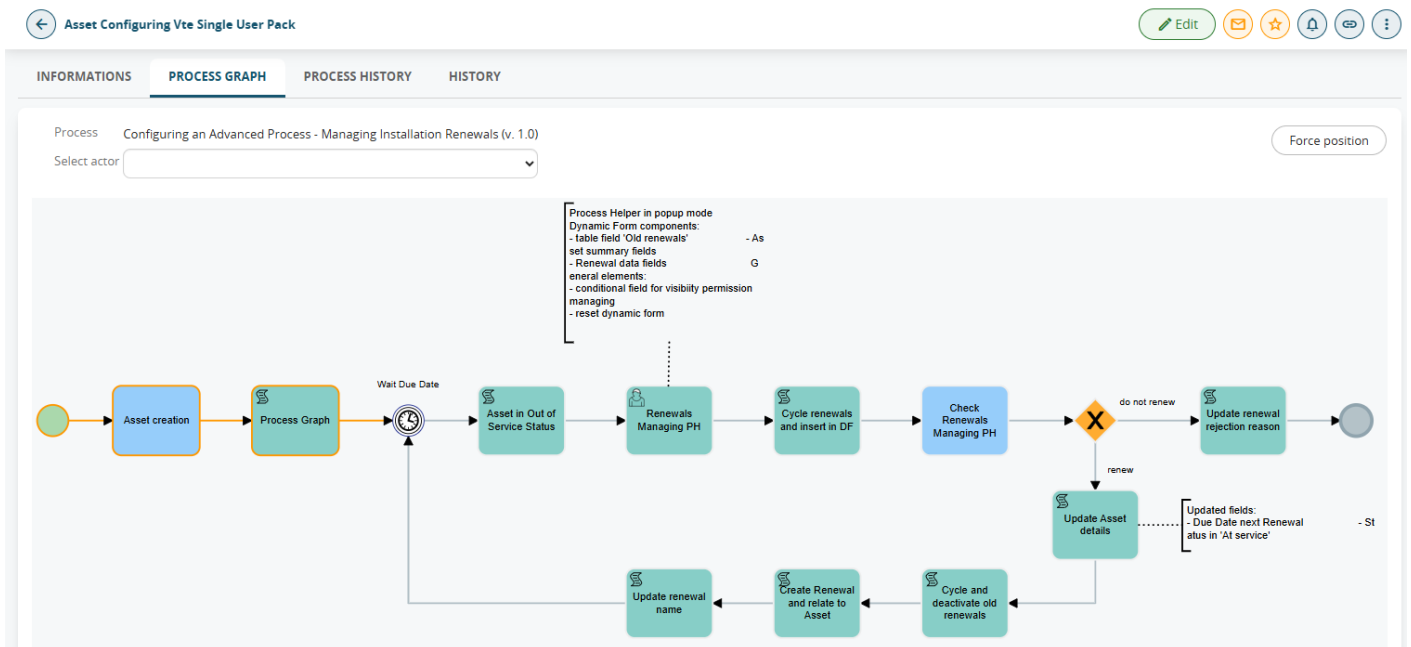


Figure 2

Once the expiration date is reached, the process will automatically set the status to “Out of Service” and present a task to the installation assignee to fill out the popup to manage the next renewal.

The popup can then be filled out by clicking on the “Fill Out” button to the right of the task (see Figure 3)

Asset Configuring Vte Single User Pack

INFORMATION PROCESS GRAPH PROCESS HISTORY HISTORY

Requested action: Renewals management for Configuring Vte Single User Pack

Your action is required to proceed:

Proceed with the renewal management for this asset.

Edit

Asset Information

Asset No	Product Name
AS1	Vte Single User Pack
Serial Number	Assigned To
1234567898765	admin@vtenext.com (User)
Date Sold	Date in Service
10-04-2025	10-04-2025
Status	Tag Number
Out-of-service	
Invoice Name	Shipping Method

SHORTCUTS

- Edit the process
- Tasks
- Notes

RELATIONS

- Processes 1
- Trouble Tickets
- Documents
- Messages
- Renewals

Figure 3

However, the task described above will only be visible by entering the installation registry, for this reason it is possible in this case to compile the process helper through the "Processes" section

reachable from the menu at the top right. (see Figure 4)

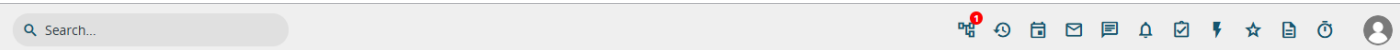


Figure 4

In fact, it shows all the pending processes assigned directly to the user or to any groups to which he belongs, so just look for the line with the following information (see Figure 5):

-process name: “Server Installation Renewal Management 1”

-connected to: “Server Installation 1”

After that, just click on the pencil to the left of the process name to be able to fill in the process helper that will be displayed as if we were editing a module.

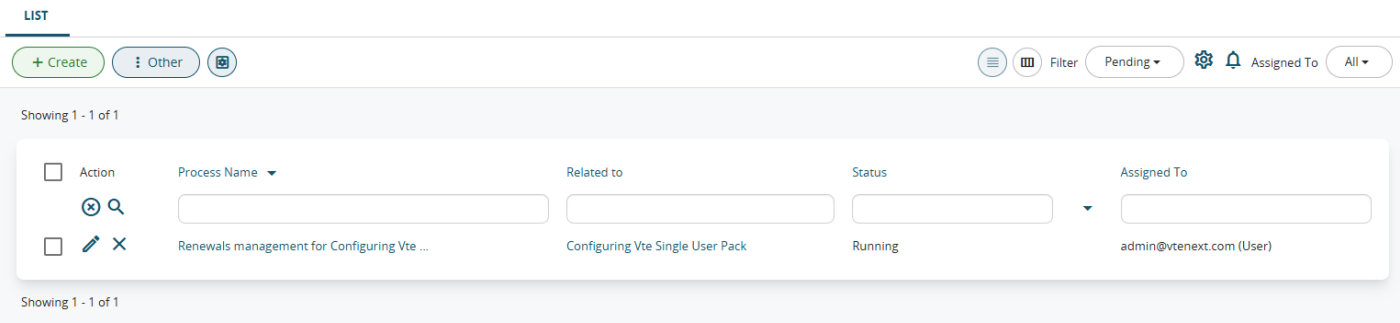


Figure 5

Once on the process helper form, the user will find themselves in front of the screen shown in Figure 6.

Based on the value of the Action field, the previously created conditional fields will be activated, which will manage the permissions of the form fields involved in the rules.

N.B: Since no renewals have been made yet, the Past Renewals table has always been hidden through the conditional fields.

Process > Renewals management for Configuring Vte Single User Pack

Save Cancel

Requested action

Your action is required to proceed:
Proceed with the renewal management for this asset.

Asset Information

Asset Name: Configuring Vte Single User Pack
Account: demoVTENEXT
Date in Service: 10-04-2025
Status: Out-of-service

Renewal Information

Action: --Please select--

Figure 6

If you want to simulate a renewal of the installation, click on the “Renew” value, in this way the system will show us the fields “Number of months Renewal” and “Additional notes” (see Figure 7).

Process > Renewals management for Configuring Vte Single User Pack

Save Cancel

Your action is required to proceed:
Proceed with the renewal management for this asset.

Asset Information

Asset Name: Configuring Vte Single User Pack
Account: demoVTENEXT
Date in Service: 10-04-2025
Status: Out-of-service

Renewal Information

Action: Renew
Renewal Months Number: 5
Additional Note: First Renewal

Figure 7

Once the 2 fields mentioned above are filled in, we save and the process will generate a renewal that will be automatically related to the installation (see Figure 8).

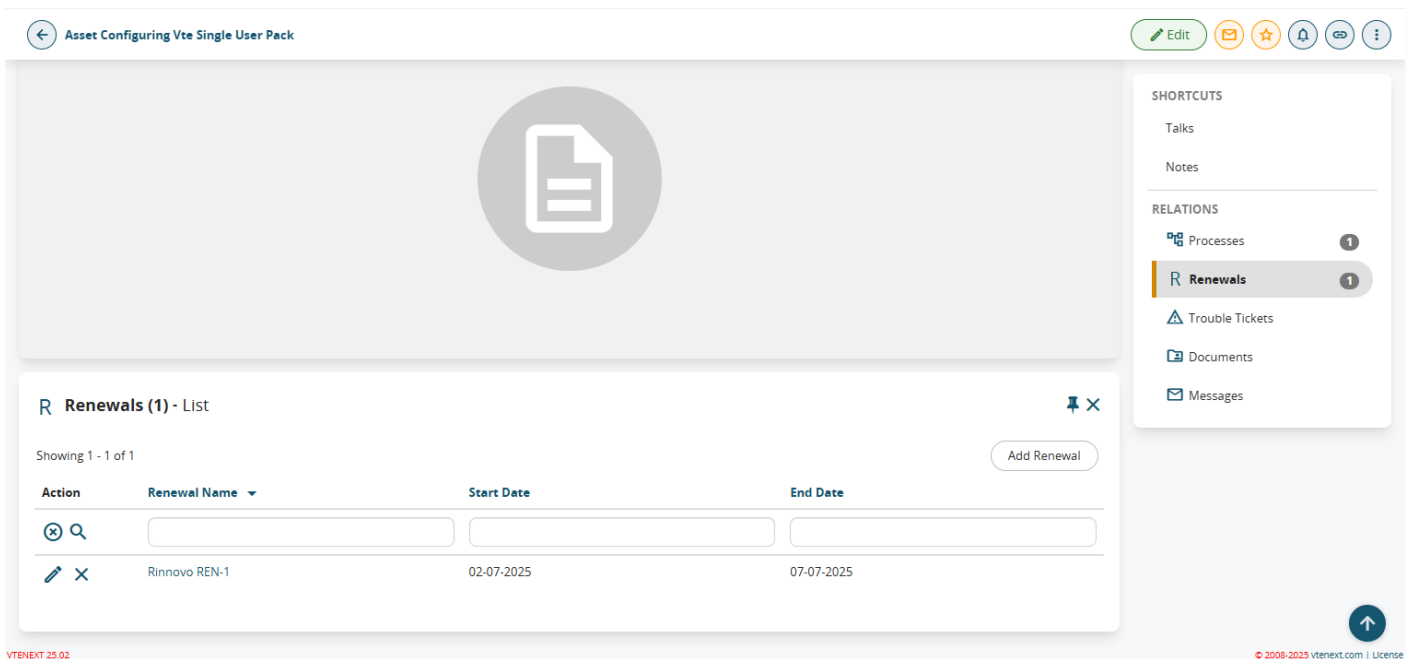


Figure 8

From the first renewal onwards the process helper will display the Past Renewals table field as shown in Figure 9

PROCESS > Renewals management for Configuring Vte Single User Pack

Save Cancel

Your action is required to proceed:

Proceed with the renewal management for this asset.

Asset Information

Asset Name	Account
Configuring Vte Single User Pack	demoVTENEXT
Date in Service	Status
10-04-2025 (dd-mm-yyyy)	Out-of-service

Renewal Information

Old Renewals	Start Date	Due Date	Additional Notes
Rinnovo REN-1	02-07-2025 (dd-mm-yyyy)	07-07-2025 (dd-mm-yyyy)	First Renewal

Action

--Please select--

Figure 9

Simulating instead of not wanting to renew, we click on the value "Do not renew", the system will ask us to enter a reason for refusing the renewal (see Figure 10).

Upon saving, the "Reason for refusing renewal" field of the installation will be populated.

PROCESS > Renewals management for Configuring Vte Single User Pack

SaveCancel

Asset Information

Asset Name

Configuring Vte Single User Pack

Account

demoVTENEXT

Date in Service

10-04-2025

(dd-mm-yyyy)

Status

Out-of-service

Renewal Information

Old Renewals

Renewal Name

Start Date

Due Date

Additional Notes

Rinnovo REN-1

02-07-2025

07-07-2025

First Renewal

(dd-mm-yyyy)

(dd-mm-yyyy)

Action

Do not Renew

Reason for Renewal Refusal

They have enough users.

Figure 10

Revision #2

Created 2025-05-27 10:18:35 UTC by Riccardo

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