

WorkFlow

for Microsoft Dynamics™ AX

by **MW**solutions

Control your company's processes through handling and approval procedures

Microsoft
GOLD CERTIFIED
Partner

Process and event management

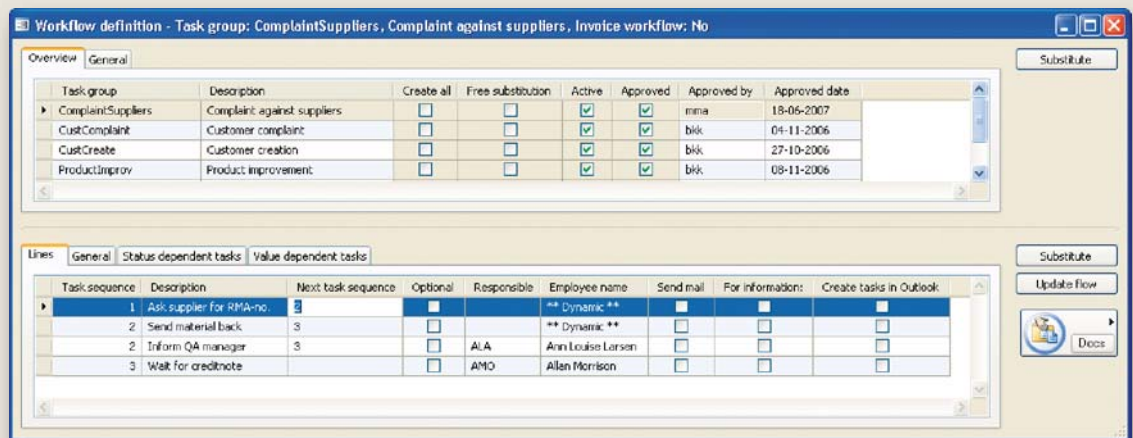
All companies need to be able to automate the progression and execution of different administrative processes. This could for example be approval of supplier invoices, control and approval of received goods, who does what when goods are ready for delivery? You can base your process on everyone in the organization remembering their task and remembering to advise the next person in

the process, or you could set up a workflow assisting your employees in executing their tasks in a highly efficient way. MW solutions Workflow meets these requirements and offers a module which is fully integrated into Microsoft Dynamics™ AX

WorkFlow overall

Workflow handling is based on the setup of task groups each including a number of work processes. These consist either of an employee receiving a task or simply receiving some information.

For each task group you need to specify whether all processes should be created at the same time or whether they should be created one by one as the previous processes are being terminated/approved/rejected etc.



The individual process can be linked to a specific employee or be dynamic, in which case the employee must be specified by the person initiating the workflow.

The work processes can be sequential and/or parallel, they can be conditional based on a certain status, or be mandatory and/or optional enabling you to set up any imaginable workflow. Each individual process can be linked to an instruction via the MW solutions Dynamics™ AX Document Management offering access to version control and other features.

If you do not know in advance who is to be part of a workflow or how many parts should be involved - if for instance an employee creates a proposition for improving a handling process - you can use the "Forwarding" functionality, which makes the workflow completely flexible, by making it possible to forward the task to the next employee(s), including documents that may have been attached along the flow. When setting up the processes you can choose whether to create Microsoft® Office Outlook® tasks or to send an email to the employee in question and/or an email to either the department manager or a mail group.

Substitutes

To any given workflow, you can set up substitutes, which are the employees that are allowed to perform the task, either if no-one is specified in the workflow, or if they are allowed to do it instead of the one set up in the workflow. This could be for instance if the employee is busy with

other things, or if he is on vacation. Here you can set up a date interval for when an other employee should perform the task, and then the task will automatically be forwarded to him, without making any changes to the workflow setup.

Integration to Dynamics AX Document Management

Included in MW solutions WorkFlow is a part of another MW solutions module - The Microsoft Dynamics™ AX Document Management - and by using this, you can point in the workflow attach and see documents, just like you can call a template, f. ex. if you are working on shared documents,

filling out fields on the same checklist and so on. Likewise, you can attach procedures and/or instructions for a given workflow or a specific task, so that the employee can see what is expected of him.

Status codes

The handling of the individual process is controlled by status codes which are set up without any constraints on description. The first time you activate this menu item,

there will be created a set of standard status codes with the standard setup, so you don't have to create these from the scratch.

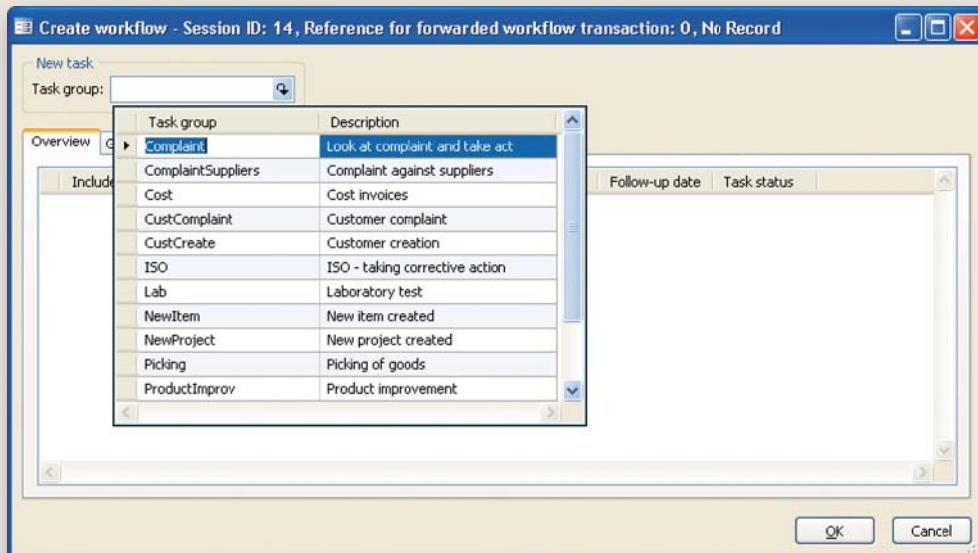
Task status	Complete	Approved	Declined	Forwarded	Open	Future	Edit allowed	For information	Deleted	Send mail	Default	Derived status
Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Open
Closed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Open
Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Open
Deleted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Forwarded	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Future	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Future
Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Open	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Rejected	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rejected

Implementation of workflow tasks

Tasks do not create themselves which is why MW solutions has integrated WorkFlow in several of its other modules (MW solutions QA, complaint handling, etc.). In addition, the WorkFlow module makes it easy to initiate workflows in just the place you need it, for example when creating/deleting an entry in a table (for example recruitment files in the HR module, creation of new items, and so on), or when changing the value of a given field (for example delivery

date on the sales order line). MW solutions WorkFlow can be initiated through alerts which means that it can be triggered from all over Microsoft Dynamics™ AX.

In addition, there is a function for manually implementing workflow.

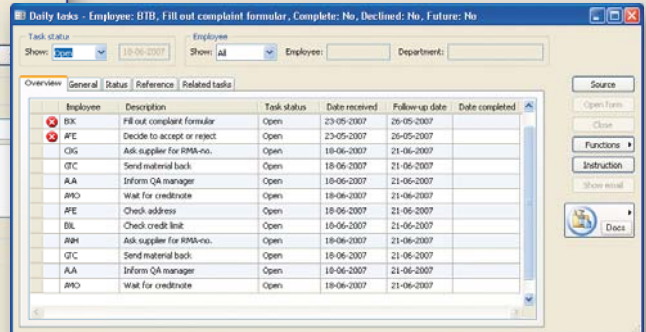
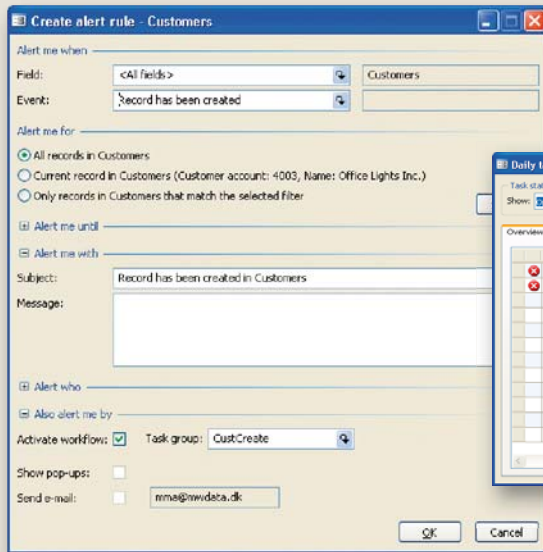


Daily tasks

When a workflow is created, information about the processes is being transferred to an overview of daily tasks where the individual employee can view the processes he/she is involved in.

The workflow is controlled using the daily tasks overview. Here the individual employee indicates whether a task is

completed or whether it has been forwarded to another colleague. If the task is completed, the next task will automatically be initiated, thus the next task can depend on the approval or denial of the prior task. If there are more "action takers" on the prior task, the next one will only be created when all prior tasks are completed.



The daily tasks overview can be used to view ongoing tasks per employee, per department or total tasks for the company. You can also view open, outstanding and/or completed tasks here (see screen shot above).

In each process in the daily tasks overview, the employee can open from where the workflow was created, for example the sales order containing the line where the delivery date was changed, a quality registration or a recruitment file.

Using MW solutions Dynamics™ AX Document Management, the employee can also call up the instruction that was attached to the process when it was created and also register new documents in the workflow itself. These documents can be accessed by all the employees who at some time will perform a task in this particular workflow.

You can also start the workflow via a smart client, mea-

Mail-integration

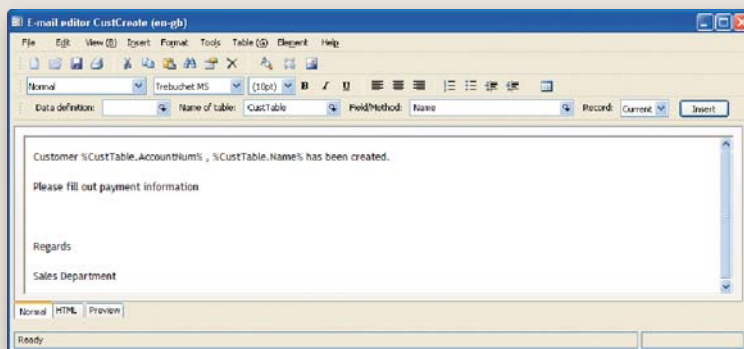
On each workflow task, you can set up whether there should be sent an e-mail or not. In MW solutions WorkFlow there is a system for setting up e-mail templates, where

ning you do not have to have Microsoft Dynamics™ AX installed. This could for instance be used if external partners are part of a workflow.

Finally, the employee can change the status of his particular task. This could take place when the task is completed but also when a task is forwarded to another employee who might be better suited to perform the task, or when a task is rejected because it was mistakenly allocated to the employee.

When the status of a task is changed, a check is made to see whether there are status dependent and/or optional processes to be initiated on the next level. If there are optional processes or processes with dynamic employees, the employee updating his/her status can then be asked to make decisions regarding the subsequent processes.

you can design your own e-mail using values from the tables you have access to from a given workflow.



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