



U-LINC®: Workflow and Notifications Anytime and Anywhere for Microsoft Dynamics® GP

An Integrity Data White Paper

"U-LINC® has given us the ability to quickly and easily implement workflow solutions into our existing infrastructure, which has resulted in a massive uptick in productivity."

-Steve Gillson, Blade-Tech

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Executive Summary

Automating business processes is challenging. Every day, organizations struggle to enforce business rules and receive timely notifications of business transactions that ultimately impact profitability.

In today's economic climate, organizations are looking for ways to further automate and streamline their business processes, so they can operate more efficiently and effectively.

The most affordable and simple way to achieve this, is to leverage technologies and systems they already own, making it possible to get *more* out of their existing Microsoft Dynamics GP system in the form of broader system notifications and workflows that are actually tailored to their existing business processes.

This white paper describes how U-LINC, a revolutionary notification and workflow solution, can be easily deployed within any organization. It works seamlessly within and across their existing Microsoft Dynamics GP system without changing the way the organization does business. Workflow and notifications anytime, anywhere for Microsoft Dynamics GP becomes reality by leveraging common, flexible technologies that the organization already uses.

Introduction: Seeking Improved Performance

Organizations typically deploy notification and workflow management solutions to define, manage, distribute, and monitor work as it goes through specific business processes. This not only ensures consistent adherence to policies, but also it enables the organization to move work through the process more efficiently while making sure the necessary individuals are involved. Collaboration between staff across the entire organization becomes more efficient and effective, which considerably improves organizational performance.

Notification and workflow solutions provide real-time access to information, allow key players to stay informed, impart necessary data for timely decisions, automate communications and approvals, and monitor events and processes. Many ERP systems, including Microsoft Dynamics GP, provide limited notification and workflow solutions. However, organizations typically have a large number of business processes or rules that cannot be enforced within their current system because the solution is not as comprehensive or flexible as they need it to be.

Ultimately, organizations require an application that is simple to use, easy to implement, and flexible enough to meet complex business requirements across their entire Microsoft Dynamics GP system, not just certain areas of it. Having a system that can enforce business process rules will greatly improve communication and throughput, resulting in a significant improvement of organizational performance.

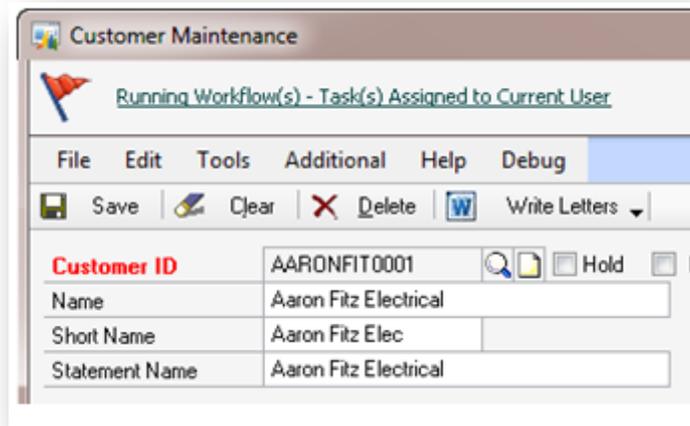
U-LINC for Microsoft Dynamics GP – A Revolutionary, Intelligent Workflow Solution

U-LINC for Microsoft Dynamics GP is a solution that revolutionizes how organizations manage daily business processes because it works across their entire system, is flexible, and easy to use, thus improving organizational performance.

U-LINC is also an intelligent solution because it is designed around a “set it and forget it” philosophy. Once the user sets up a notification or workflow to monitor or enforce a business process, he or she can forget about it because the application automatically notifies when information has changed or an action is required.

Works across the entire Microsoft Dynamics GP system

Some workflow solutions provide a limited number of rigid, predefined workflows for specific processes in Microsoft Dynamics GP. However, each organization has unique needs and uses for notifications and workflow, and thus requires a solution that will work anytime and anywhere within their Microsoft Dynamics GP system, not just in certain areas. For example, an organization may want to notify a Customer Account Manager when a User Defined field on the Customer Maintenance window was changed. Or, require the Controller to approve all new account numbers created in the GL system. Or, have a multi-step process for employee direct deposit account changes that notifies the Payroll Clerk, runs a verification procedure on the bank account, and once verified, requires an approval by the Payroll Manager. Once approved it notifies the Payroll Clerk and the employee of the completed actions.



View and edit workflow information within the Microsoft Dynamics GP system

Defining workflow and notifications anytime, anywhere for Microsoft Dynamics GP is no longer an impossibility, but rather a reality with U-LINC. U-LINC also supports third party and ISV products, which allows users to link notifications and workflows to data and transactions across various systems and multiple Microsoft SQL Server databases.

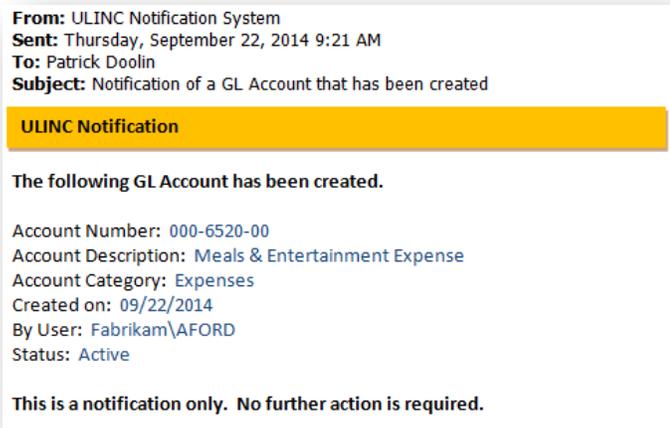
Flexible and easy to use

U-LINC allows the organization to control where to leverage the power of workflow, so it matches their business processes – from simple to complex – rather than changing their business process to fit within the system constraints. Implementation of these workflows is easy with out of the box templates provided. Modifying and creating new processes is also simple. This allows the user to swiftly keep up with business needs, as well as regulatory and compliance changes.

U-LINC notifies users of changes in the system or of new workflows via email. The content of the email is user-defined and may include an unlimited amount of data elements that are determined when setting up the workflow. The user can format the emails in various ways based on the content of the workflow.

U-LINC's flexibility allows for unlimited user notifications and workflow approval levels. The user can route workflow based on data both inside and outside of Microsoft Dynamics GP, which does not limit the data available to only GP. For example, a user may change customer payment terms on the Customer Maintenance window in Microsoft Dynamics GP. When saved, U-LINC can be configured to check for open Opportunities in Microsoft Dynamics CRM and if found, notify the sales person associated with the opportunity, of the payment term's change.

This type of flexibility, when configuring workflow, is paramount to an efficient and effective paperless workflow system. Lack of this flexibility causes organizations to manually enforce business rules and process workflows, which is costly, time consuming, and prone to errors or delays.

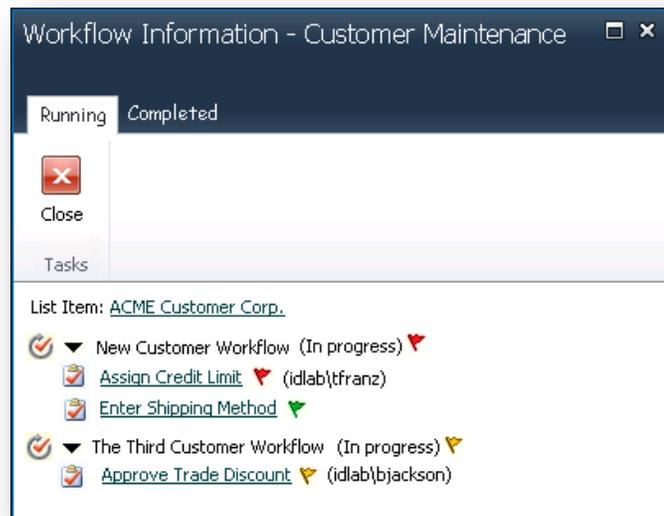


Sample e-mail notification

Improves organizational performance

Within an organization, communication across departmental boundaries can often be inefficient and fragmented. Users often circumvent or omit manual implementation of notifications and workflows. Communication is disrupted when disparate systems must be manually accessed in order to move along workflow. In many cases, users may not even be aware that someone has to be notified or an approval is required; or, users may be unclear on who is to be notified and the criteria necessary to invoke an approval workflow. These types of circumstances are inefficient and costly.

Streamlining the process of creating notifications and workflows based on defined business processes, data elements, and transactional conditions will improve the organization's efficiency and performance. Automatic notifications and workflows can be configured to route information and data based on defined roles and/or via specific individuals. U-LINC notifies multiple individuals simultaneously, reducing the time required to spread mission critical data to decision makers. Workflows automatically move from one individual to the next as steps are completed, creating an electronic audit trail and a general log of all the transaction history along the way.



Simple, user-friendly workflow interface

Automatic workflows also allow business decision makers to be informed before something occurs, allowing them to be proactive and avoid possible problems in the future. For example: a notification is received that a certification or license will expire in the next 30 days allowing action to be taken to update the license on time; Or, a notification is received that a customer balance is within the threshold of the maximum balance allowed so this can be dealt with before the maximum balance is exceeded.

Leveraging Technology

U-LINC uses technology that typically already exists within organizations today by leveraging the power of Microsoft Dynamics GP, Microsoft® SQL Server® and Microsoft® SharePoint® Server 2010 Foundation, which is available at no cost as a part of Windows Server. The use of current, flexible, industry standard technology is critical to maintaining the health and scalability of the solution.



Organizations can leverage the power of SharePoint out-of-the-box and public tools, such as the use of Microsoft Visio 2010 to model business process flowcharts or SharePoint Designer for simplifying the creation of more complex workflows. Publicly available extensibility tools can also be used to provide additional functionality within SharePoint, such as having a workflow automatically begin a new process or workflow. U-LINC empowers both Microsoft Dynamics GP Partners and customers with the ability to extend workflows to run SQL scripts or integrate with other systems, SQL databases, or web services without changing the base U-LINC application. This provides maximum flexibility and extensibility with minimal effort and cost since most organizations already own and use SharePoint 2010 Foundation.

U-LINC connects the power of Microsoft Dynamics® GP, Microsoft SQL Server and Microsoft SharePoint

Conclusion

Organizations struggle to enforce business processes within their current Microsoft Dynamics GP System, which leads to a loss of efficiency and effectiveness and therefore lower profitability. Key business objectives are difficult to achieve due to existing communication barriers between departments and internal controls not being enforced.

The combination of Microsoft Windows SharePoint and Microsoft SQL Server allows U-LINC to deliver rich workflow functionality anytime, anywhere across the entire Microsoft Dynamics GP system with minimal configuration and cost required, yet maximum flexibility afforded. This enables organizations to work more efficiently and effectively, which results in a significant improvement of organizational performance.

For more information on U-LINC please visit u-linc.com, contact your Partner, or call Integrity Data at 888.786.6162.



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