Get Started With Dynamics GP Workflow

CAL Business Solutions
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Today's Objectives

- Overview of Setup for Workflow
- Understand Workflow Options
- What is a Step?
- Shortcuts
- Design Workflows
- Implement Workflow
- Questions

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Workflow Setup

Today we are focusing on workflows with email integration!

Before you start, you will need:

✓ Web Services Installed

✓ An Email Account for Workflow

Workflow Setup

Sample Setup Window
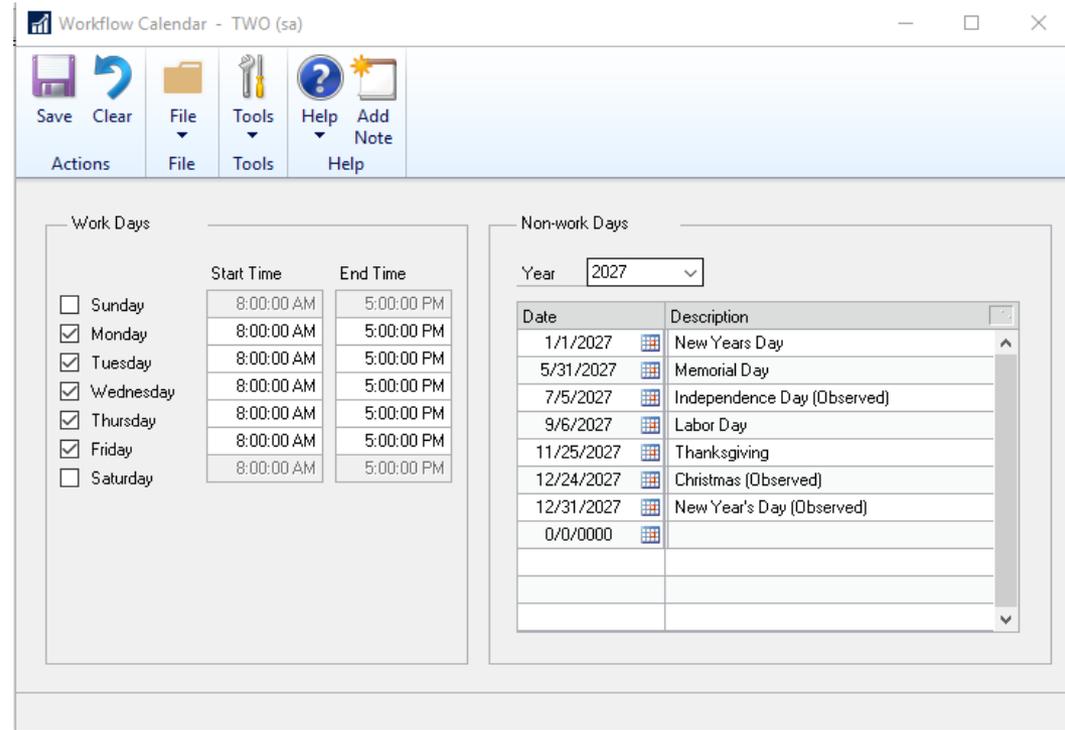
Email Setting for Notifications **>**

Email Action Setup **>**

Administration -> Setup -> System -> Workflow Setup

Workflow Setup

Workflow Calendar

Used to determine the deadlines for activity assignments made for workflow steps

Administration -> Setup -> System -> Workflow -> Workflow Calendar

Workflow Setup

Email Messages

- Messages that start with "WF"
- Can be customized
- Additional fields can be added
- Can create new emails to fit your needs!

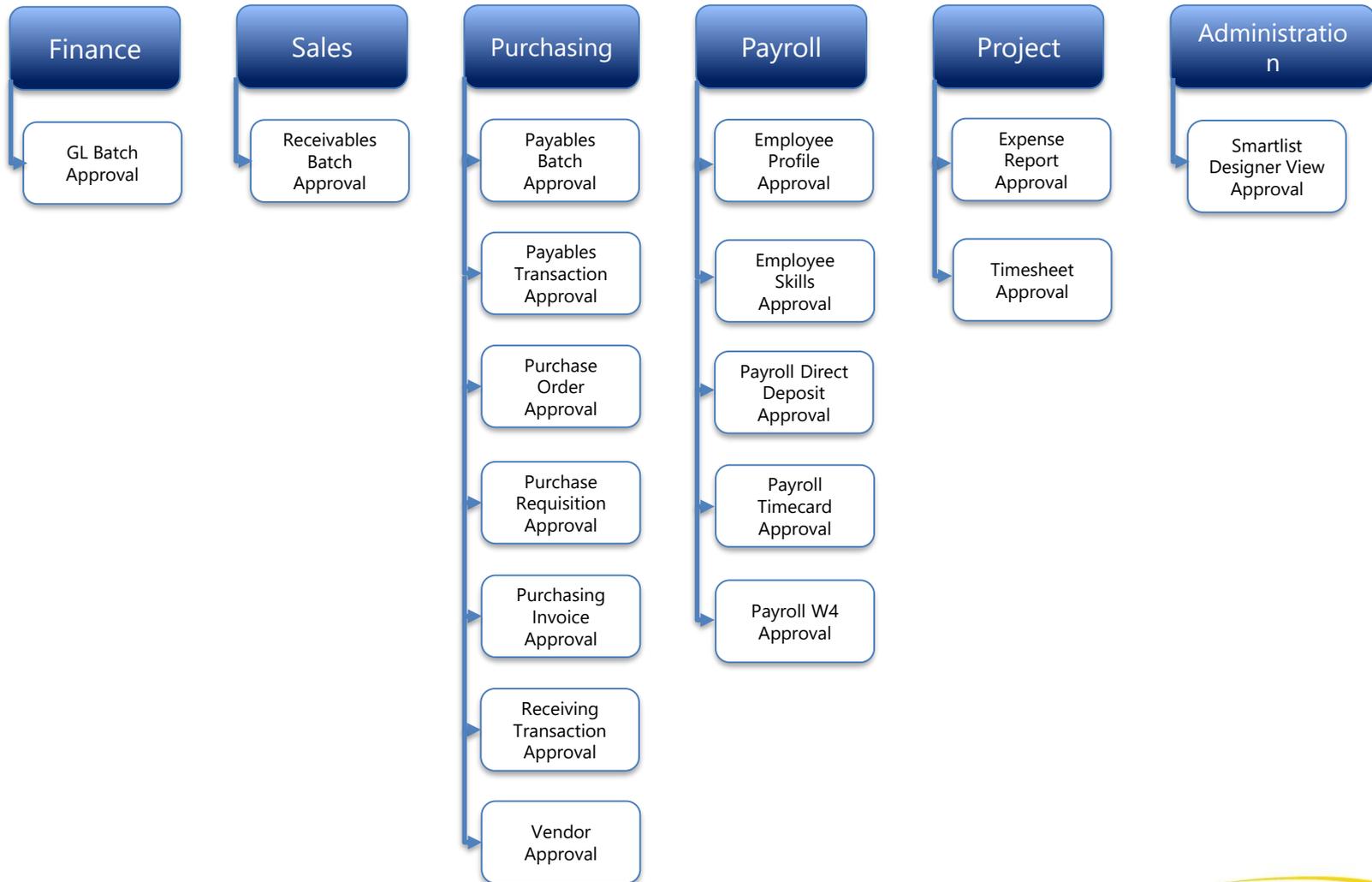**Administration -> Setup -> System -> Workflow -> Email Message Setup**

Workflow Setup

Document Attachment

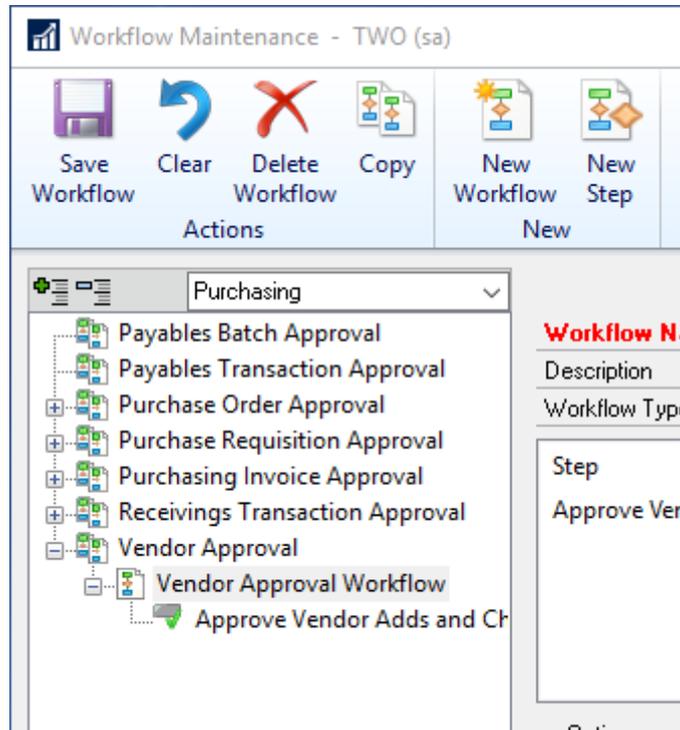Used in conjunction with emails if documents need to be attached to workflow notifications

Administration -> Setup -> Company -> Document Attachment Setup

Workflow Types by Series (as of 18R1)

Finance
- GL Batch Approval

Sales
- Receivables Batch Approval

Purchasing
- Payables Batch Approval
- Payables Transaction Approval
- Purchase Order Approval
- Purchase Requisition Approval
- Purchasing Invoice Approval
- Receiving Transaction Approval
- Vendor Approval

Payroll
- Employee Profile Approval
- Employee Skills Approval
- Payroll Direct Deposit Approval
- Payroll Timecard Approval
- Payroll W4 Approval

Project
- Expense Report Approval
- Timesheet Approval

Administration
- Smartlist Designer View Approval

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Workflow Icons

Icon	Description
	Workflow type
	Workflow that is not active
	Workflow that is active
	Task workflow step
	Approval workflow step
	Unsaved workflow or workflow step
	Expand all
	Collapse all
	Copy

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Workflow Maintenance
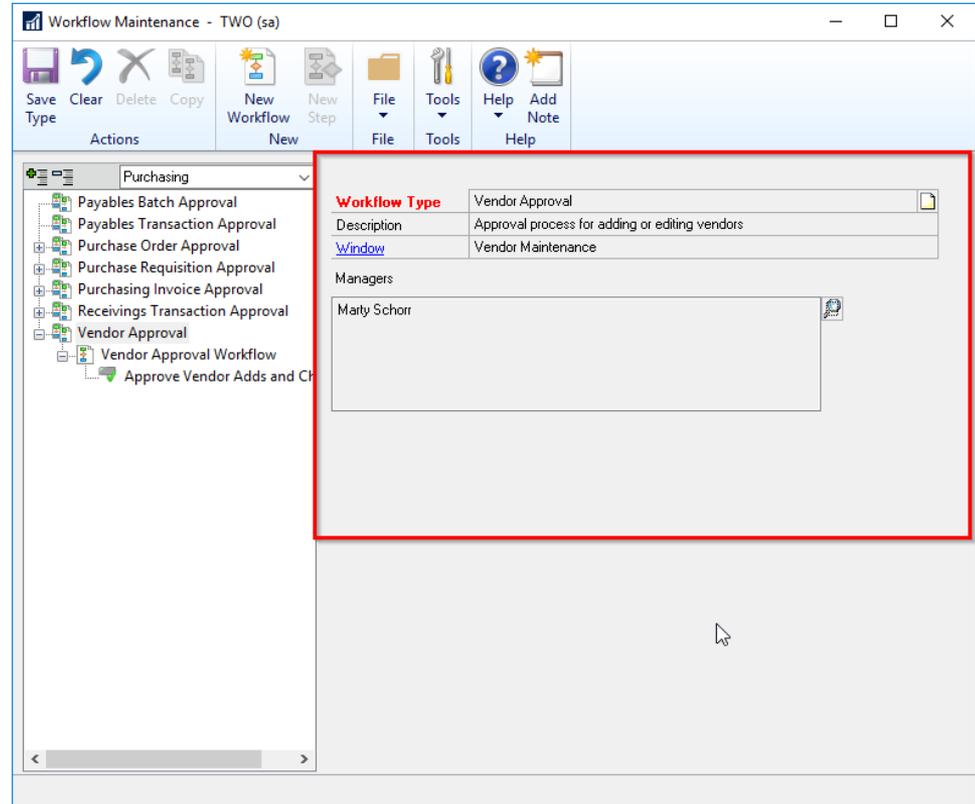
Components of Workflow Maintenance

- Workflow Type
- Workflow
- Steps
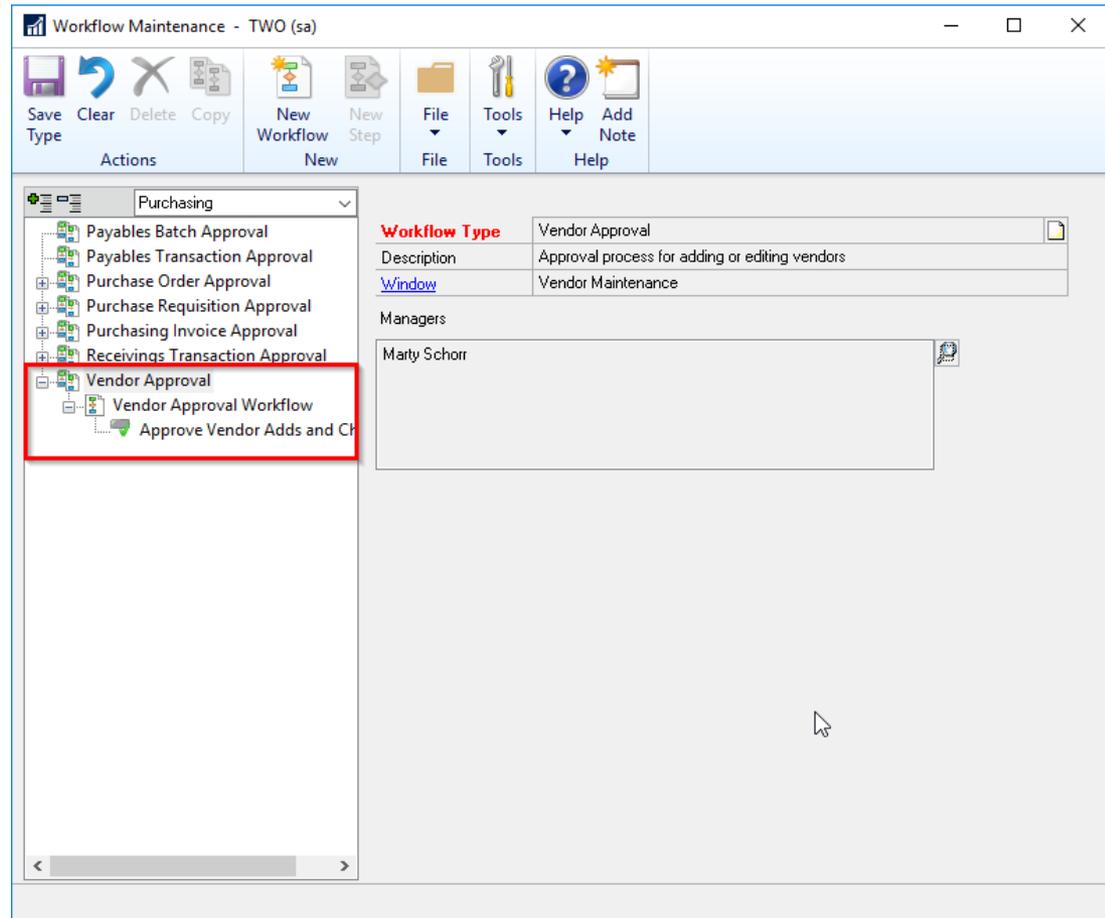
Workflow Maintenance

Components of Workflow Type

- Workflow Type
  - Describes what type of workflow
    - I.E. Vendor Approval
- Workflow Description
- Window
  - GP Window that is used
    - I.E. Vendor Maintenance
- Managers
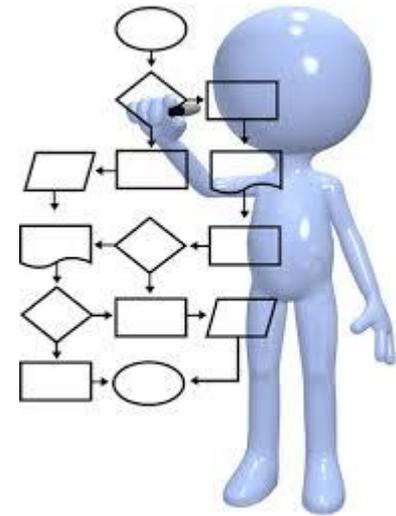
Workflow Maintenance

Managers

The workflow manager will be able to create and configure workflows of that type.

Workflow managers must be defined for the workflow type before you can activate a workflow for the type.

Managers lookup button
Opens the Workflow User Selection window, where you can select managers for the workflow type

Workflow Manager

Workflow Maintenance

Creating a Workflow

1. Choose your type
2. Choose your Manager
   a) Use Lookup
   b) Type in Name
   c) Binoculars and Add

Workflow Maintenance

Creating a Workflow (Cont.)

3. Click on New Workflow
4. Name your workflow
5. Choose your settings

6. Save your Workflow

Workflow Maintenance

Send notifications for completed actions

- Mark to send notification messages to users when the documents they've submitted have completed actions in the workflow approval process.

- This option is available if you have marked he Enable E-Mail for Workflow option in the Workflow Setup   window.

- Choose the expansion button to open the Workflow Email Notification Maintenance window. You can use this window to select which completed action that the originator should be notified about, the message to send for the notification of the completed action, and the carbon-copy (cc) recipients of the notification.

Allow approver to delegate tasks

- Mark to allow an approver to delegate a task to another approver in the workflow.

- For example, assume that Frank is reviewing a purchase order. If this option has been selected, Frank will be able to delegate the purchase order to another approver in the workflow.

Allow originator to be an approver

- Mark to allow the person who originated the workflow to approve the document.

Always require at least one approver

- Mark if you want documents to be approved by at least one person.

Alternate final approver

- Enter the name of an alternate final approver if you want a different escalation approver. The alternate approver is assigned to the approval action under the following conditions.

- The Always Require at Least One Approver option is marked and there are no approval steps whose conditions are met.

- The Always Require at Least One Approver option is marked and the approver edits the document and there are no following approval steps.

- There are no approval steps following an overdue step, depending on your escalation settings.

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Workflow Maintenance

Creating a Workflow (Cont.)

9. Click on New Step
10. Name Your Step
11. Determine Step Order
12. Define Conditions
13. Define Assignments
14. Define Completion Policy
15. Save Your Step

Workflow Maintenance

Creating a Workflow (Cont.) 17

16. Define Completion Policy
17. Save Your Step

Workflow Star

Vendor Workflow

New Vendor
Or
Edit Existing Vendor

Approver

Payable Transaction Work Flow

Purchase Order Work Flow

New Transaction
Or
Edit Existing Purchase
Order

Accounting Dept.? — Yes → Accounting Approver 1 → Transaction over $1,000? — Yes → Accounting Approver 2 → Complete

Accounting Dept.? — No → Any Other Dept.?

Any Other Dept.? — Yes → Approval Process

Any Other Dept.? — No → Alternate Approver → Complete

Transaction over $1,000? — No → Complete

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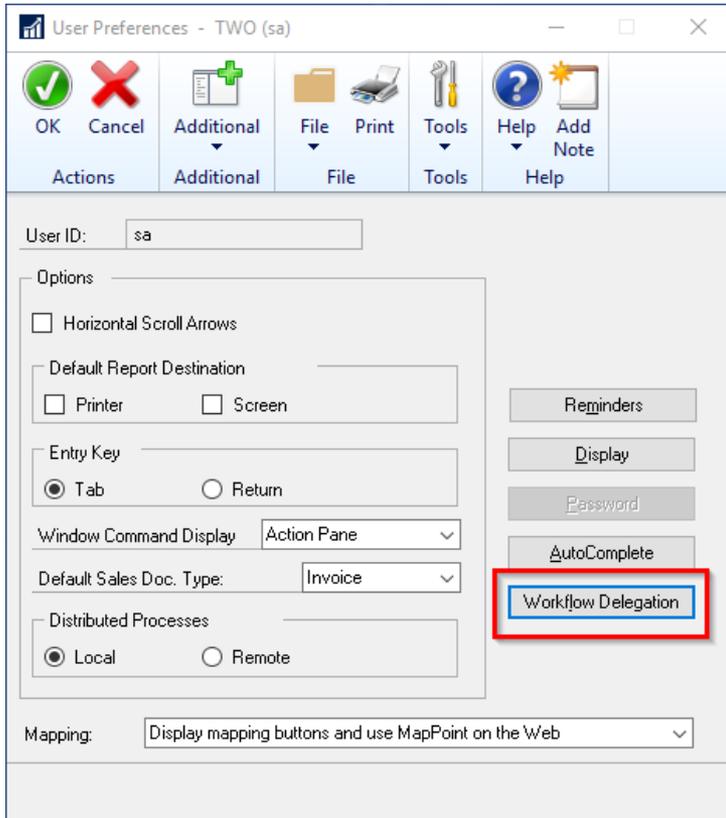*Dynamics GP User Event*
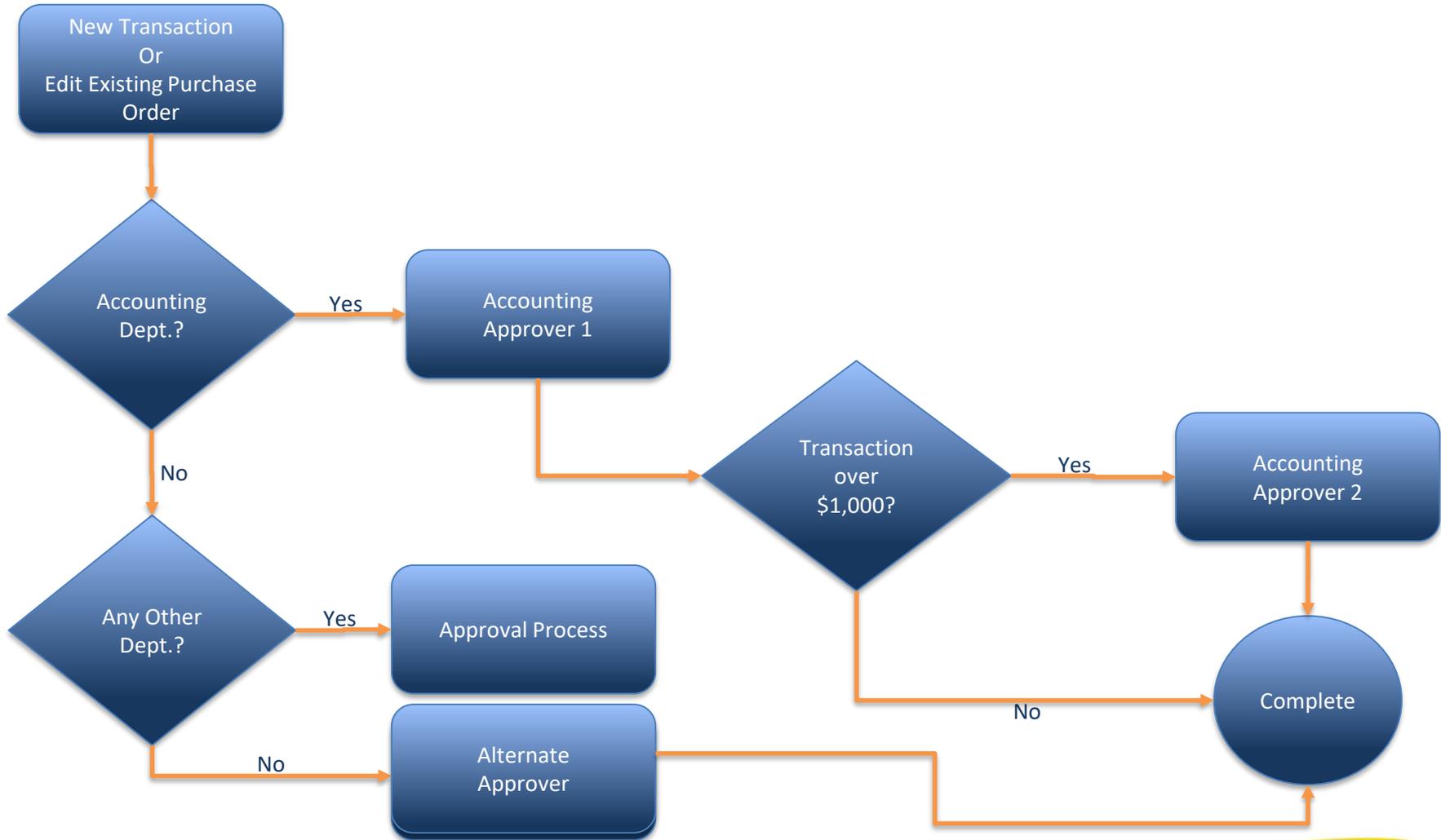
Workflow Approvals

- Workflow can be approved in multiple ways:
  - Via Email (GP **AND** Non-GP users!)
  - On the GP Homepage (Tasks)
  - Through Navigation Lists (Bulk!)
  - On the individual window in GP (Batch, Transaction, & Cards)

Workflow Delegation

User Preferences -> Workflow Delegations

Workflow

Demonstration

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