

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

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 >

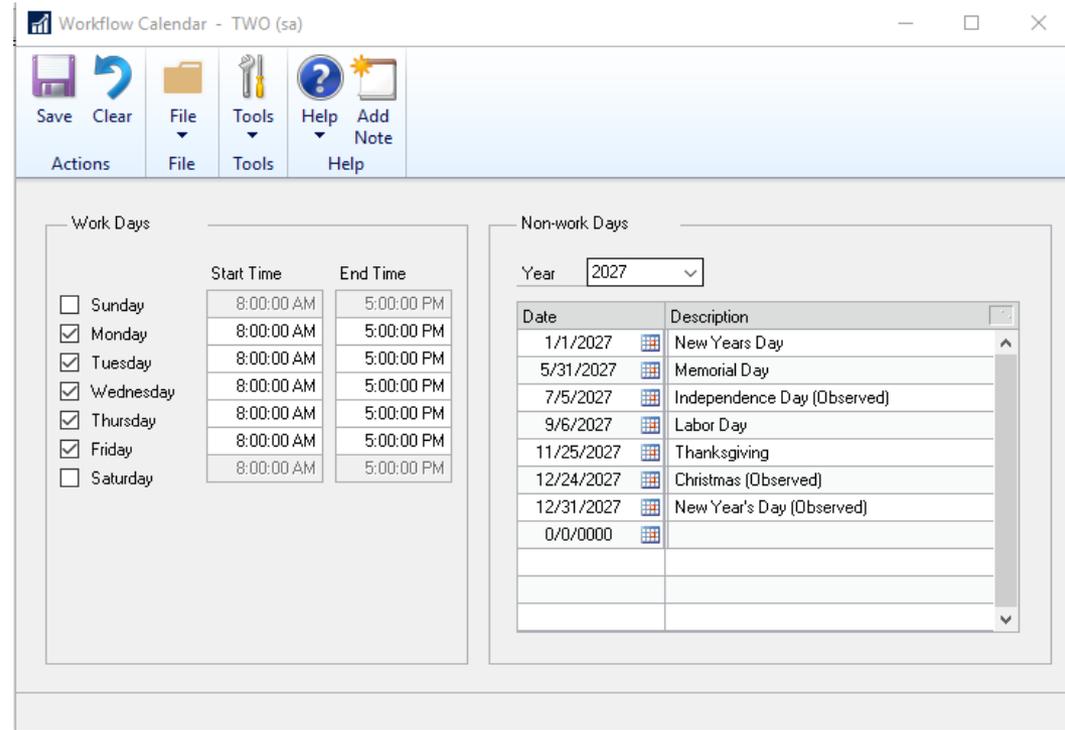
The screenshot shows the 'Workflow Setup - TWO (sa)' window. The title bar includes standard window controls and a menu bar with 'File', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for 'OK', 'Cancel', 'Test E-Mail', 'Test E-Mail Action', 'File', 'Tools', 'Help', and 'Add Note'. The main content area is divided into two sections, both highlighted with red boxes. The top section, 'Enable E-Mail for Workflow', has a checked checkbox. It contains fields for 'Outgoing Mail Server (SMTP)', 'E-Mail Address' (marks@calszone.com), 'Display Name' (Mark Saia), 'Server Name' (mbs.calszone.com), and 'Port' (25). There is an unchecked checkbox for 'This server requires a secure connection (SSL)'. The 'SMTP Authentication' section has three radio buttons: 'Windows Authentication using Database Engine service credentials' (selected), 'Basic Authentication', and 'Anonymous Authentication'. Below 'Basic Authentication' are fields for 'User Name' (msaia), 'Password', and 'Confirm Password'. The bottom section, 'Enable E-Mail Actions', has a checked checkbox. It contains fields for 'Dynamics GP Web Services Server', 'Server Name' (MARK-NB2), and 'Port' (48620). There is an unchecked checkbox for 'This server requires a secure connection (SSL)'.

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!

Message Setup - TWO (sa)

Save Clear Delete Copy File Tools Help Add Note

Actions File Tools Help

Message ID WF ASSIGN PMDDC APPROVAL*

Description Assignment notification for Payables Transaction Approval workflows

Message Type Workflow Assignment

Series Purchasing

Doc. Type Payables Transaction Approval

Subject You have a task assignment for Payables (%Document Type%) (%Voucher Number%)

Body Document Lines Validate

You have been assigned a task for the (%Workflow Step Name%) step in the Payables Transaction Approval workflow for Payables (%Document Type%) (%Voucher Number%).

Task Deadline: (%Action Deadline%)
Edit or view the document: (%Document Drill Down%)

(%Workflow Action List%)

Document Type: (%Document Type%)
Document Number: (%Document Number%)
Description: (%Description%)
Vendor: (%Vendor Name%)
Document Date: (%Document Date%)
Transaction Amount: (%Document Amount%)

Comments:
(%All Workflow Comments%)

Select and Insert Fields

Document Fields Field Insert

Workflow Fields Additional fields

Have Replies Sent to Select Names

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

Workflow Setup

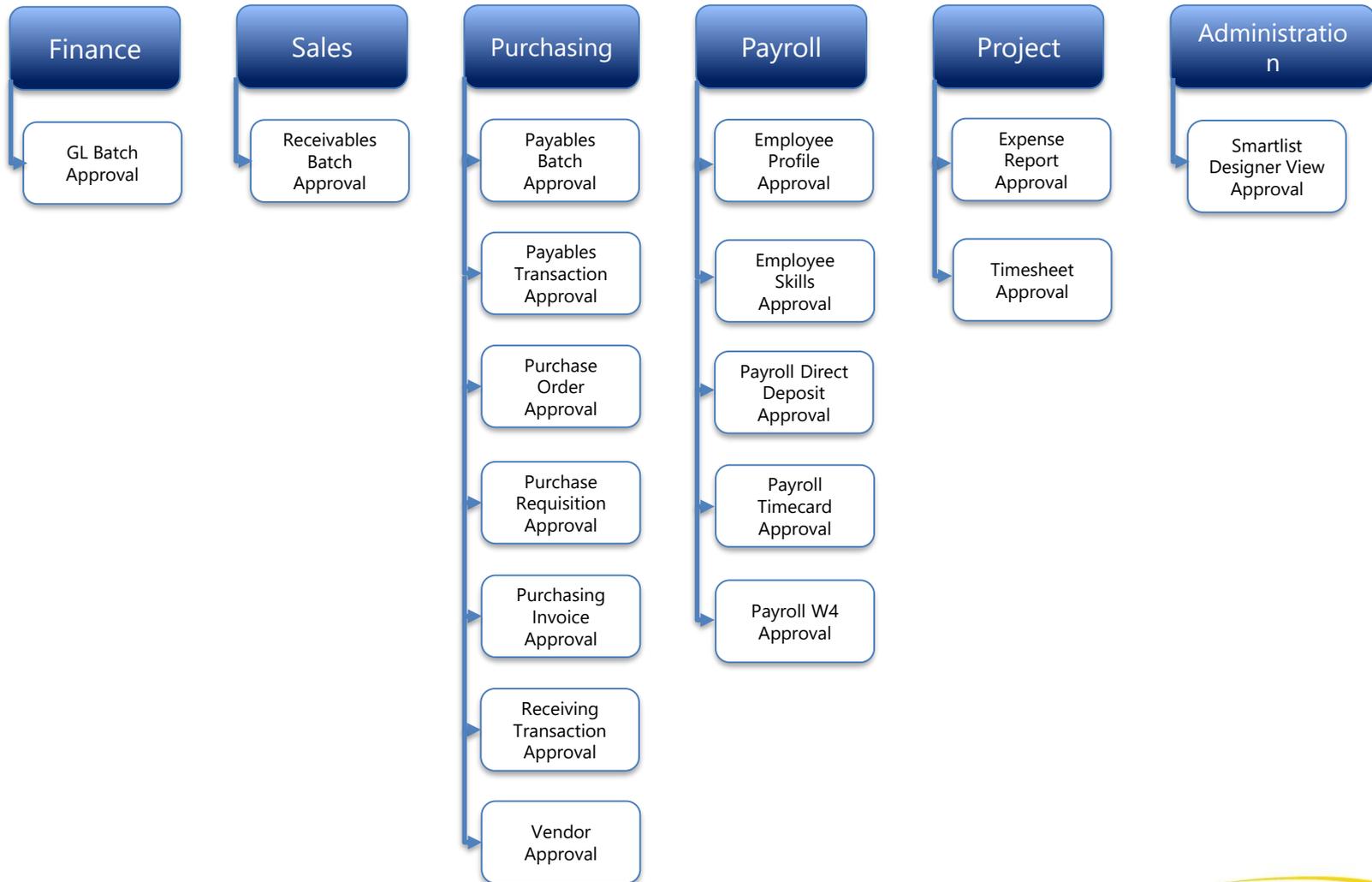
Document Attachment

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

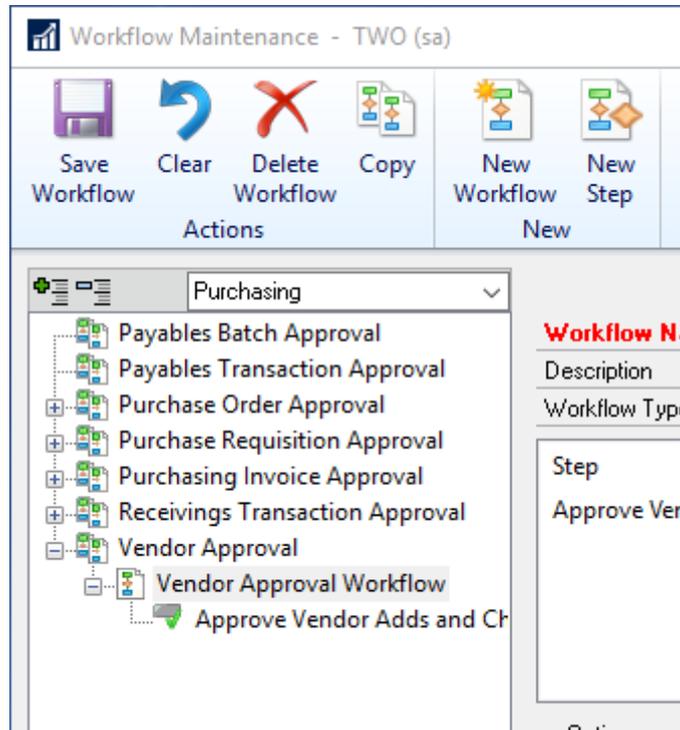
The screenshot shows the 'Document Attachment Setup - TWO (sa)' dialog box. It features a standard Windows-style title bar and a menu bar with 'OK', 'Cancel', 'File', 'Tools', 'Help', and 'Add Note'. The main area contains several sections: 'Allow Document Attachments' (checked), 'Attachment Location Options' (with a 'Default Location' field and a 'Delete file from Default Location after attachment' checkbox), 'Maximum File Size' (set to 999.99 Megabyte Maximum), 'Attachment Management Defaults' (with checkboxes for 'Allow attachments to be deleted', 'Allow attachments to be added in inquiry windows', and 'Allow attachments to flow from Master Records to Documents'), and 'Attribute Defaults' (a table with four rows and two columns). The 'Allow attachments to flow from Master Records to Documents' section includes sub-sections for 'Customer Maintenance window', 'Item Maintenance window', and 'Vendor Maintenance window', each with a 'Type' dropdown (Flow/Not Flow) and a radio button. There is also a checkbox for 'Send Attachments in email'.

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

Workflow Types by Series (as of 18R1)



Workflow Icons

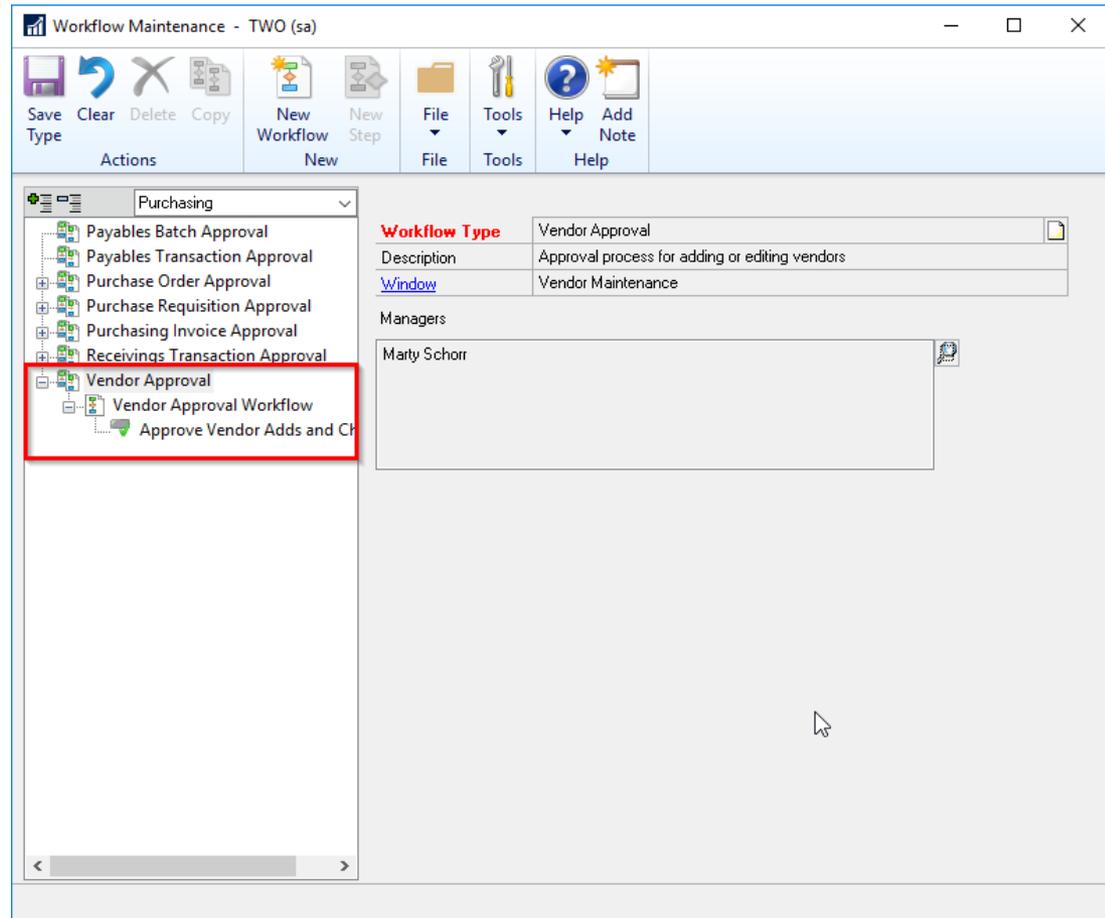


Icon	Description
	Workflow type
	Workflow that is not active
	Workflow that is active
	Task workflow step
	Approval workflow step
	Unsaved workflow or workflow step
	Expand all
	Collapse all
	Copy

Workflow Maintenance

Components of Workflow Maintenance

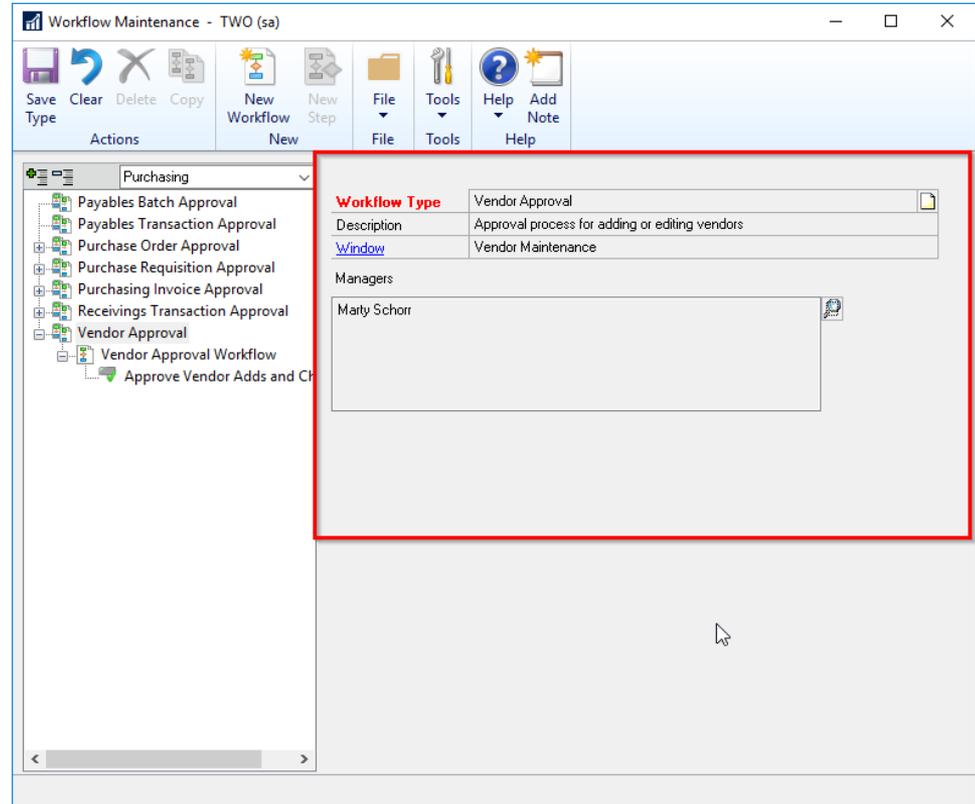
- Workflow Type
- Workflow
- Steps



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

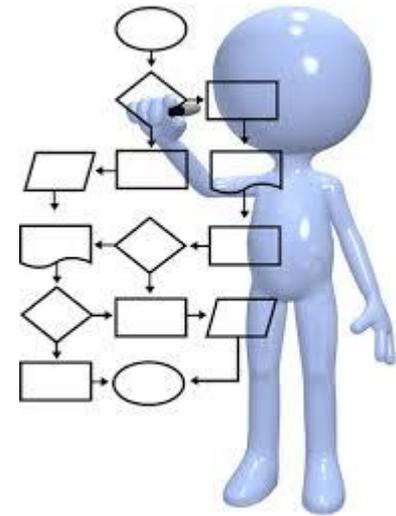
Managers

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

The screenshot displays the 'Workflow Maintenance - TWO (sa)' application window. The main window shows a tree view of workflow types under 'Purchasing', including 'Payables Batch Approval', 'Payables Transaction Approval', 'Purchase Order Approval', 'Purchase Requisition Approval', 'Purchasing Invoice Approval', 'Receivings Transaction Approval', and 'Vendor Approval'. A blue box with the number '1' highlights the 'Payables Batch Approval' item. To the right, the 'Workflow Type' details are shown, including the description 'Approval process for Payables batches' and the window 'Payables Batch Entry'. Below this, the 'Managers' section is visible, with a blue box and the number '2' highlighting the search icon.

The 'Workflow User Selection - TWO (sa)' dialog box is open in the foreground. It features a toolbar with 'OK', 'Cancel', 'File', 'Tools', and 'Help' buttons. The 'Selection Type' is set to 'People and Groups'. The 'Find' field contains the text 'Marty Schorr (CALZONE\marty)' and is highlighted with a blue box and the number '2'. To the right of the 'Find' field are 'Add' and 'Remove' buttons. Below the 'Find' field is a list box labeled 'Selected Users', which is currently empty.

Workflow Maintenance

Creating a Workflow (Cont.)

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

Workflow Maintenance - TWO (sa)

Save Workflow Clear Delete Workflow Copy New Workflow New Step File Tools Help Add Note

Purchasing

Payables Batch Approval
Payables Transaction Approval
Purchase Order Approval
Purchase Requisition Approval
Purchasing Invoice Approval
Receivings Transaction Approval
Vendor Approval
Vendor Approval Workflow

Workflow Name: Vendor Approval Workflow
Description: Vendor Approval Workflow
Workflow Type: Vendor Approval

Step: Approve Vendor Adds and ...
Condition: Always run
Assignment: Mark Saia

Options:

- Send notifications for completed actions
- Allow approver to delegate tasks
- Allow originator to be an approver
- Always require at least one approver
- Use alternate final approver

When a task is overdue:

- Take no action
- Escalate to next approver
- Escalate to:
- Automatically reject the overdue task

Workflow Email Notification Maintenance - TWO (sa)

5

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 the 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.

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

The screenshot displays the 'Workflow Maintenance - TWO (sa)' application window. The interface is divided into several sections:

- Toolbar (15):** Located at the top, it includes buttons for 'Save Step', 'Clear', 'Delete Step', 'Copy', 'New Workflow', and 'New Step'. The 'New Step' button is highlighted with a red box and a blue callout '9'.
- Tree View (10):** On the left, a tree view shows a hierarchy of workflow steps under the 'Purchasing' category. The step 'Approve Vendor Adds and Changes' is selected and highlighted with a blue callout '10'.
- Step Configuration (11):** A form on the right allows defining the step's details. The 'Step Name' is 'Approve Vendor Adds and Changes', the 'Description' is the same, and the 'Step Type' is 'Approval'. The 'Order' section has radio buttons for 'This step is a first step' and 'This step follows the selected step:'. A blue callout '11' is positioned above this section.
- Condition (12):** Below the step configuration, there are radio buttons for 'Action is always required for this step' (selected) and 'Action is required only when the following condition is met:'. A text area for defining conditions is present, along with a dropdown for 'If the condition is not met:'. A blue callout '12' is positioned to the left.
- Assignment (13):** This section includes fields for 'Assign to:' (Mark Saia), 'Time limit:' (8 Hours), and 'Reminder:' (4 Hours). There are checkboxes for 'Apply Workflow Calendar', 'Send Message:' (WF ASSIGN VEND APPROVAL*), and 'Include Document Attachment documents'. A blue callout '13' is positioned to the left.
- Completion Policy (14):** This section has radio buttons for 'Only one response needed' (selected), 'Majority must approve', and 'All must approve'. A blue callout '14' is positioned below this section.

Workflow Maintenance

Creating a Workflow (Cont.) 17

16. Define Completion Policy
17. Save Your Step



Workflow Star

Workflow Maintenance - TWO (sa)

Save Workflow (17)

Active (16)

Workflow Name: Vendor Approval Workflow

Description: Vendor Approval Workflow

Workflow Type: Vendor Approval

Step	Condition	Assignment
Approve Vendor Adds and ...	Always run	Mark Saia

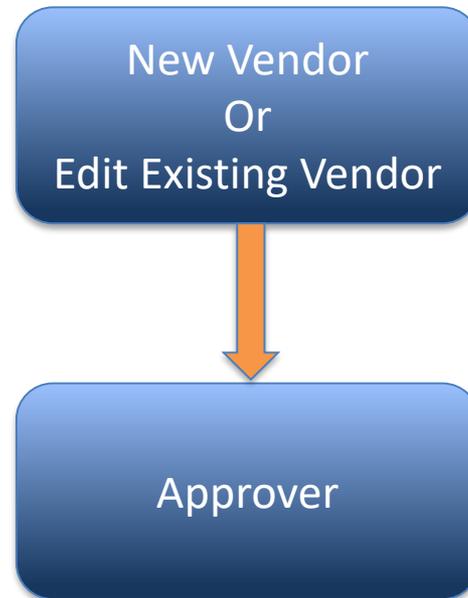
Options:

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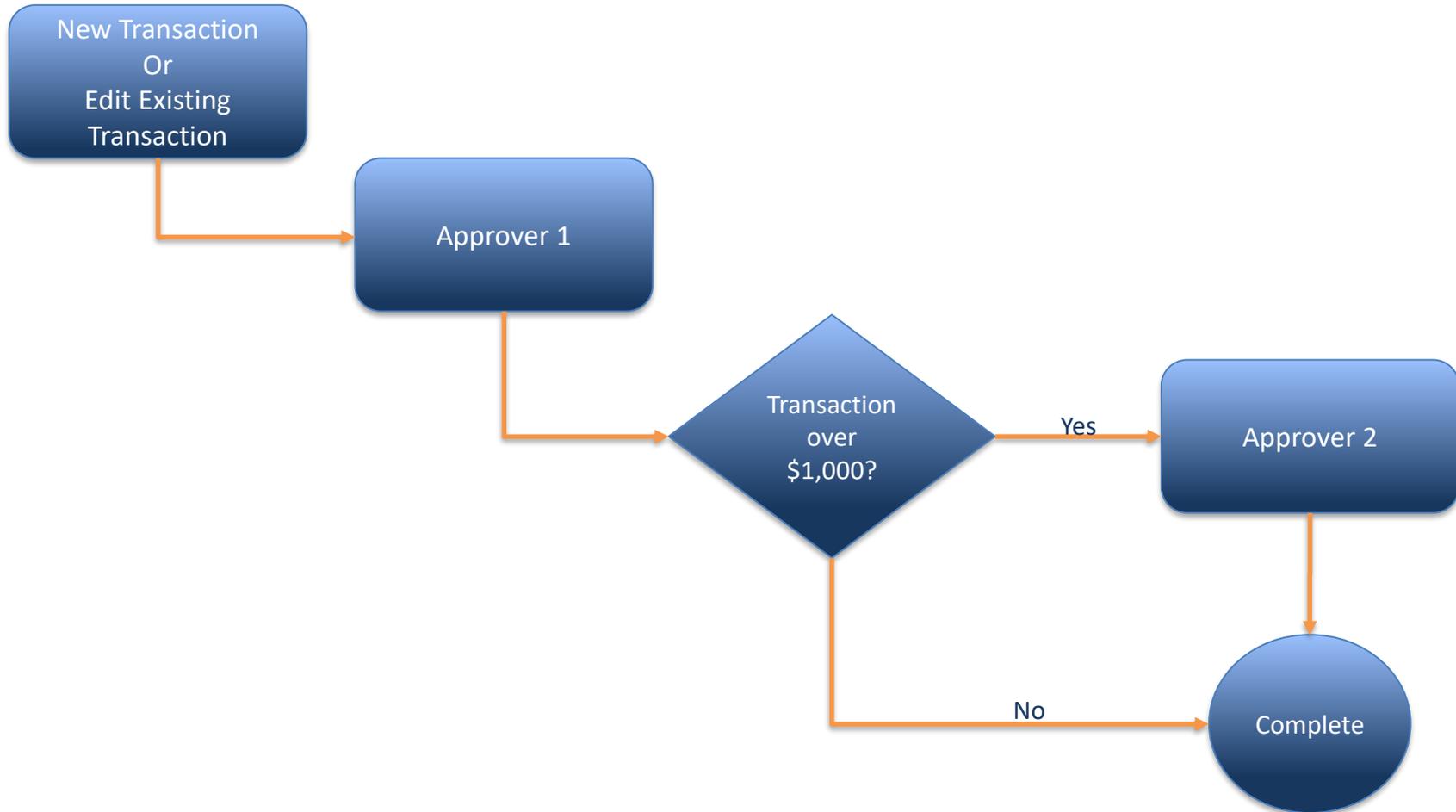
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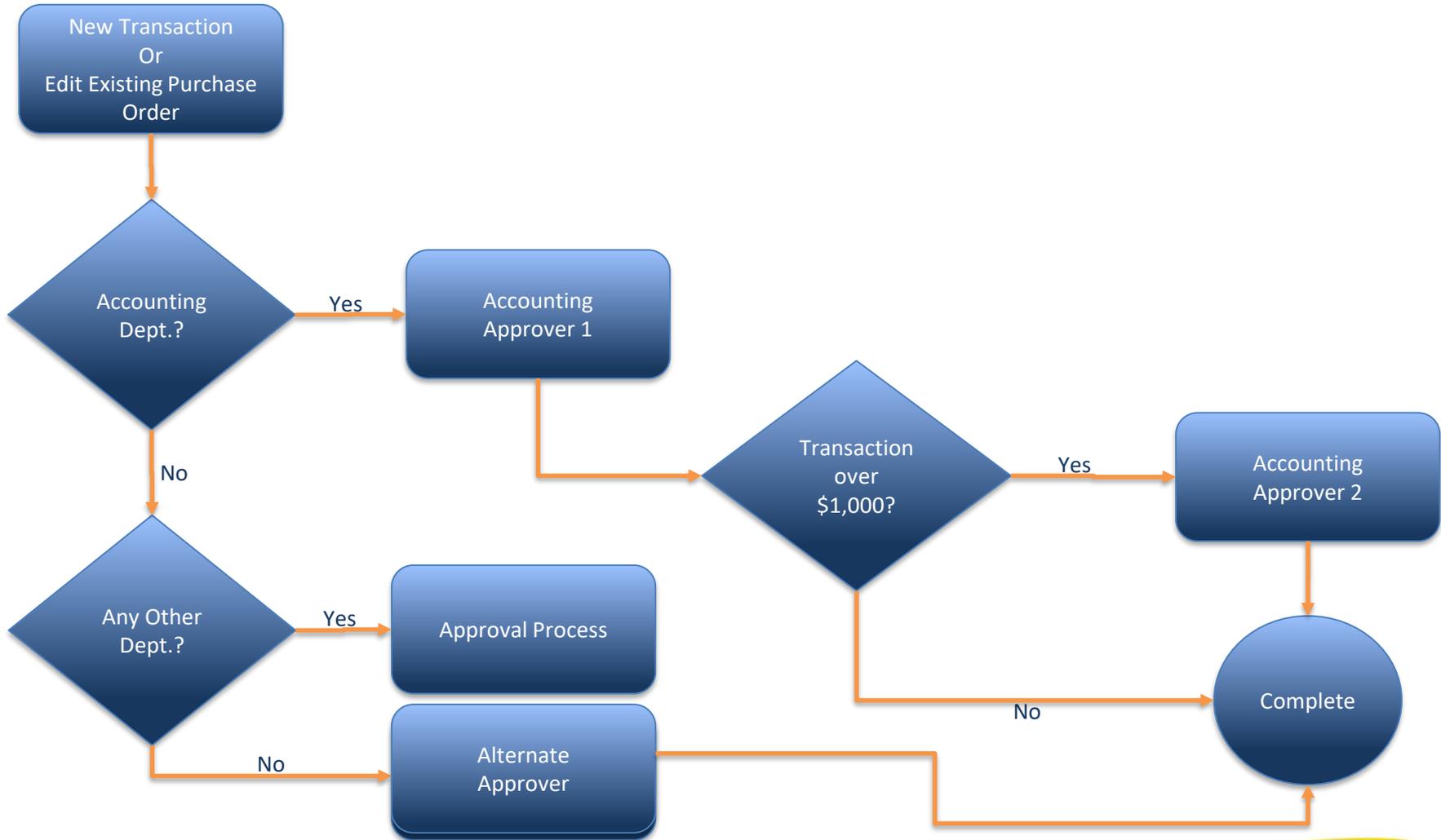
Vendor Workflow



Payable Transaction Work Flow



Purchase Order Work Flow

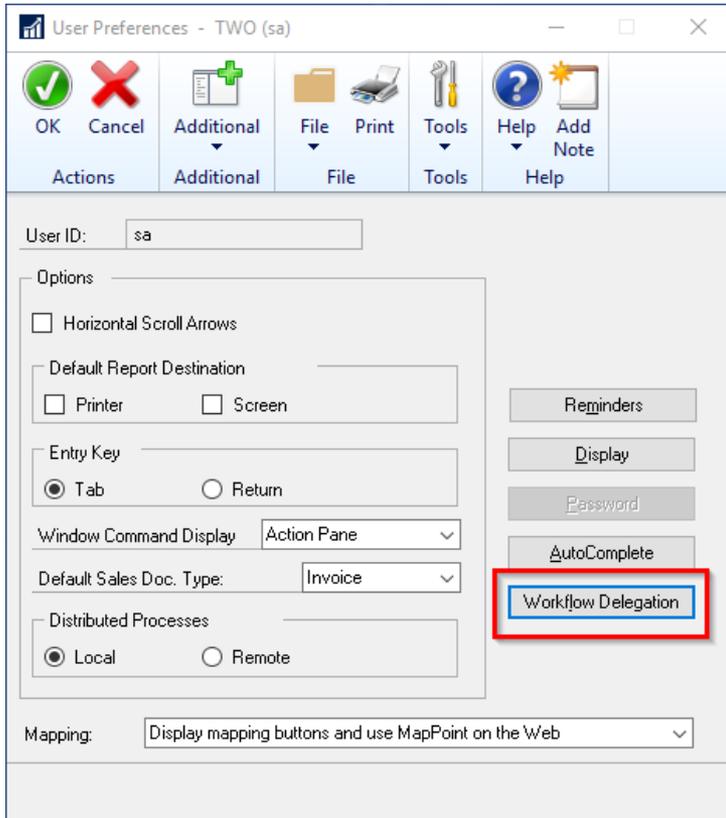


Workflow Approvals

- 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 - TWO (sa)

OK Cancel Additional File Print Tools Help Add Note

Actions Additional File Tools Help

User ID: sa

Options

Horizontal Scroll Arrows

Default Report Destination

Printer Screen

Entry Key

Tab Return

Window Command Display: Action Pane

Default Sales Doc. Type: Invoice

Distributed Processes

Local Remote

Mapping: Display mapping buttons and use MapPoint on the Web

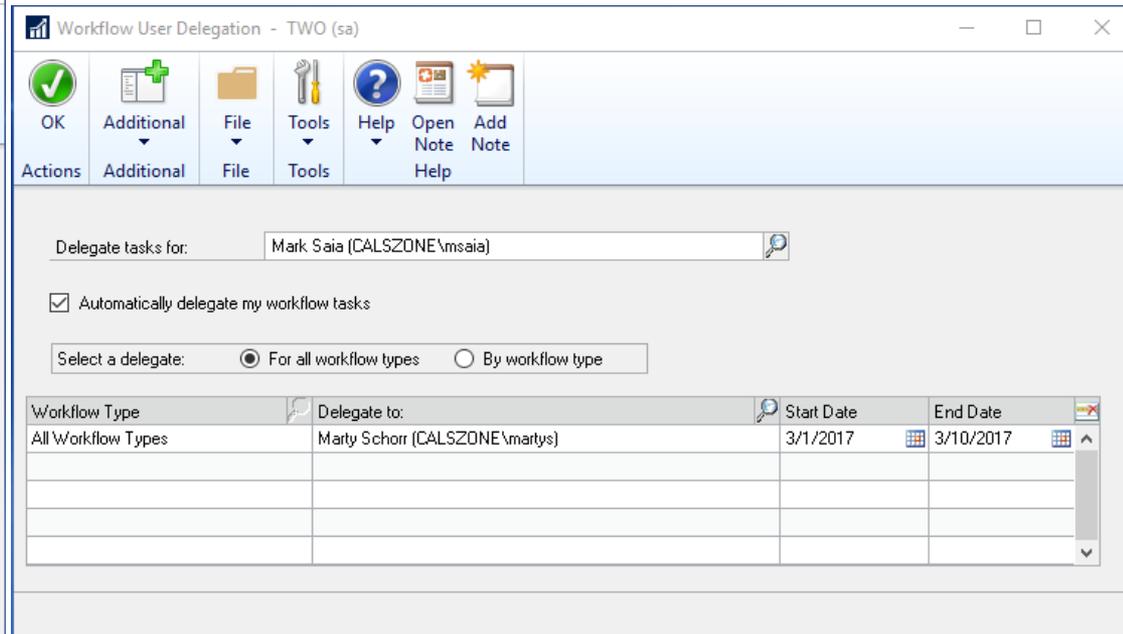
Reminders

Display

Password

AutoComplete

Workflow Delegation



Workflow User Delegation - TWO (sa)

OK Additional File Tools Help Open Note Add Note

Actions Additional File Tools Help

Delegate tasks for: Mark Saia (CALZONE\msaia)

Automatically delegate my workflow tasks

Select a delegate: For all workflow types By workflow type

Workflow Type	Delegate to:	Start Date	End Date
All Workflow Types	Marty Schorr (CALZONE\martys)	3/1/2017	3/10/2017

User Preferences -> Workflow Delegations

Demonstration