Workflow and Alerts

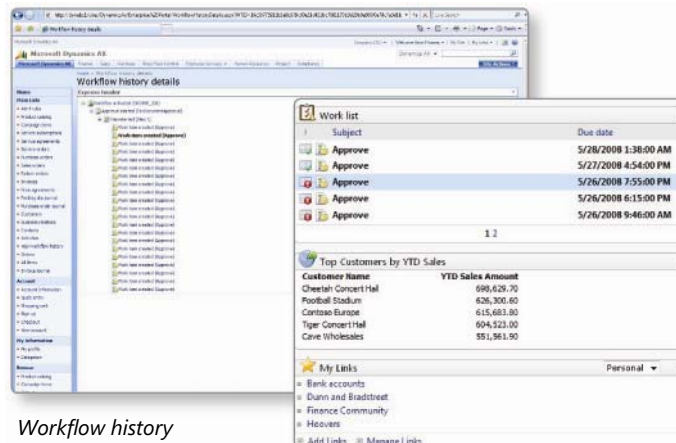## Workflow and Alerts in Microsoft Dynamics AX

BENEFITS

- **Easily automate business processes.**
  Define custom workflows to standardize and streamline your organization's business processes and stay agile at the same time.

- **Simplify compliance management.**
  Create workflows to address current risk and compliance scenarios, and help ensure that employees are following your organization's best practices.

- **Quickly create workflows using templates.** Use out-of-the-box templates to quickly configure workflows for common business tasks and activities, without the need for developer assistance.

- **Proactively monitor business activity with alerts.** Easily create alerts to help monitor key events from any Microsoft Dynamics AX record or from a predefined template. With automatic notifications, your people are aware of bottlenecks and can take quick action to resolve delays.

- **Provide flexible delivery for alerts.**
  Give people the notification information they need in a variety of ways—as pop-up windows; e-mail messages through Microsoft® Office Outlook® or through their Role Centers via the Microsoft Dynamics AX client; or by using Enterprise Portal in Microsoft Dynamics AX.

Automate business processes and improve productivity by helping your people manage and track key business events. With Microsoft Dynamics® AX 2009, people across your organization can create and standardize workflows and set alert rules that deliver automatic notifications for critical tasks and actions.

Workflow
Streamline processes across the organization by defining workflows that address current business needs and that reflect your organization's best practices. Help ensure that all tasks and approvals occur in the correct sequence, and configure escalation policies to prevent workflows from stalling. You can easily reassign tasks or approvals to another user. Review the automatically captured workflow history to verify the current status and evaluate workflow performance.

Workflow history

Workflow output and alerts

Alerts
You can extend the functionality of custom workflows to include automatic notifications, which inform specific individuals about items that require attention. By simply checking their Role Centers, people can quickly see notifications, prioritize their work, and respond quickly.

Employees can set alert rules with easy-to-use templates that are designed to help manage business priorities. For example, you can define an alert to send notification when certain criteria are met, such as when a customer shipment arrives or when an account payment is delayed by a certain number of days. Users with administrative rights can also create, modify, and delete rules for others. For example, a warehouse lead might set an alert for a warehouse employee that sends notification of an impending delivery.

Microsoft Dynamics AX

FEATURES

Embedded workflow framework

- Configure workflows easily with an embedded workflow framework based on Windows® Workflow Foundation.
- Define automated approval for specific documents, such as purchase requisitions.
- View and track the status and history of specific workflow instances and determine if changes are needed to improve efficiency.
- Provide employees with a centralized work list that shows the workflow tasks and approvals assigned to them. The work list is available in the Microsoft Dynamics AX client and Enterprise Portal in Microsoft Dynamics AX.

Out-of-the-box templates

- Quickly standardize business processes using out-of-the-box templates for:
  - General Ledger—general journal, allocations, fixed assets, and fixed assets budget.
  - Accounts Receivable—payment journal, draw bill of exchange journal, protest bill of exchange journal, redraw bill of exchange journal, remittance journal, and settle bill of exchange journal.
  - Accounts Payable—invoice register, invoice approval journal, invoice journal, payment journal, draw promissory note journal, redraw promissory note journal, remittance journal, and settle promissory note journal.
  - Trade and Source—purchase requisition approval.
  - Project Accounting—project purchase requisition approval.
  - Expense Management—cash advance request template, expense template, non–project line item workflow template, and project expense line workflow template.

Workflow configuration

- Configure business processes using workflow templates.
- Sequence task and approval workflow elements to establish workflow processes.
- Enter instructions and other information to assist users with workflow actions.

Unified Work List

- Arrange and view workflow items, alert notifications, and activities in one location from the Microsoft Dynamics AX client or from Enterprise Portal in Microsoft Dynamics AX.
- Preview information for an item and select an available action.
- Navigate to the associated Enterprise Portal in Microsoft Dynamics AX Web page or the Microsoft Dynamics AX client form to view all item-related information.

Role-based alert configuration

- Individuals can set alerts for tasks and events critical to their jobs.
- Users with administrative rights can create, modify, and delete alert rules for specific users, and assign alert rules to others.

Easy alert setup

- Quickly create an alert rule for any record in Microsoft Dynamics AX.
- Easily set up new rules based on shared templates.

Multiple monitoring capabilities

- Set alerts to receive notifications when specific values change.
- Set alerts bound to predefined dates, such as the number of days before an event or a specific date after an event is to occur.

Conditions filtering

- Apply conditions to rules so that alerts appear only when conditions are met.

Flexible notification delivery

- Receive alerts though a dedicated inbox, pop-up windows in Microsoft Dynamics AX, or as e-mail messages in Outlook with the ability to view alert details.

Quick access to alert details

- Quickly find information pertaining to an alert, such as when it occurred and why, and the before and after values of a change.
- View the form where the alert rule is set up to see more information, such as a new customer record that triggered the alert.
- Access alerts using Enterprise Portal in Microsoft Dynamics AX.

For more information about Workflow and Alerts in Microsoft Dynamics AX, visit **www.microsoft.com/dynamics/ax**.

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