



AX Workflow Top 10 Features, Tips and Tricks

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Customer Connect 2014

Innovate. Invigorate. Inspire.

Agenda

Workflow Overview

Top 10

Questions





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What is workflow?

- **Workflow is a system** – Workflow is a system that is installed with Microsoft Dynamics AX and that runs on the AOS. The workflow system provides functionality that you can use to create individual workflows, or business processes.
- **Workflow is a business process** – A workflow represents a business process. It defines how a document flows, or moves, through the system by showing who must complete a task, make a decision, or approve a document.

<http://technet.microsoft.com/en-us/library/gg732234.aspx>



What is workflow Continued...

Purchase requisitions (1) - Purchase requisition: 000061, Reorder Request 00001, Purchase requisition: 000061

File

Purchase requisition

Financials

Review

Edit

Delete

Cancel

Purchase requisition

Request for quotation

Totals

Copy

Copy lines

Refresh

Export to Microsoft Excel

Attachments

Attachments

Maintain

New

Summ...

Copy

List

Attachments

Purchase requisition review

Submit

000061 : Reorder Request 00001

Draft

Purchase requisition header

Administration

Dates

Sourcing

Purchase requisition: 000061

Name: Reorder Request 00001

Preparer: Tom Branca

Status: Draft

Requisition purpose: Consumption

Project

Buying legal entity:

Project ID:

Requested date: 11/17/2014

Accounting date: 11/17/2014

Reason: General supplies

Details:

On hold:

Explanation:

History

Purchase requisition lines

Add line

Add items

Cancel

Remove

Details

Purchase requisition line

Financials

Inventory

Item number	Product name	Procurement category	Quantity	Unit	Unit price	Net amount	Currency	Vendor account	Vendor name	CFOP	Status
C0002	Microsoft Arc™ Keyboard	Computers	240.00	ea	49.95	11,988.00	USD	U5-111	Contoso office s...		Draft

Line totals

Related documents

Review process overview

Additional details to qualify the business justification

Close

Key Terms

- Work Item – An activity that needs to take place (approval/task).
- Workflow Originator – Person who starts the workflow.
- Work Item Owner – Person assigned a work item.
- Workflow Owner – Person in charge of configuring/maintaining the workflow.
- Workflow Configuration – Canvas that contains the user defined business process.



#1 – Interactive

- Interactive UI
- Configurable Elements
 - Approvals
 - Tasks
 - Flow Controls
 - Line-Item Workflows
- Maintain Multiple Versions

The screenshot displays the 'Purchase requisition review (1)' workflow editor. The top toolbar includes options for Workflow, Copy, Delete, Cut, Paste, Edit, Toolbox, Properties, Error pane, Show, Basic settings, Activation, Notifications, Notes, and Modify workflow. The 'Workflow elements' pane on the left shows 'Approvals' selected. The 'Workflow versions (1) - Name: Purchase requisition review, PurchReqReview' dialog box is open, showing a table of workflow versions.

Workflow versions

Workflow: Purchase requisition review
Workflow ID: 000062
Type: PurchReqReview

Active	Status	Version	Modified	Modified by	Last comment
<input checked="" type="checkbox"/>		1.0.1.0	1/16/2014	Sara Thomas	Updated Approver
<input type="checkbox"/>		1.0.0.0	1/16/2014	Sara Thomas	Ax2012 R2 demo data
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

The flowchart on the right shows the workflow logic: Start (green circle) leads to a decision diamond 'Over \$10,000?'. If 'True', it goes to an 'End' node (red circle). If 'False', it goes to a 'Direct Report Approval' task (document with checkmark) and then to the 'End' node.

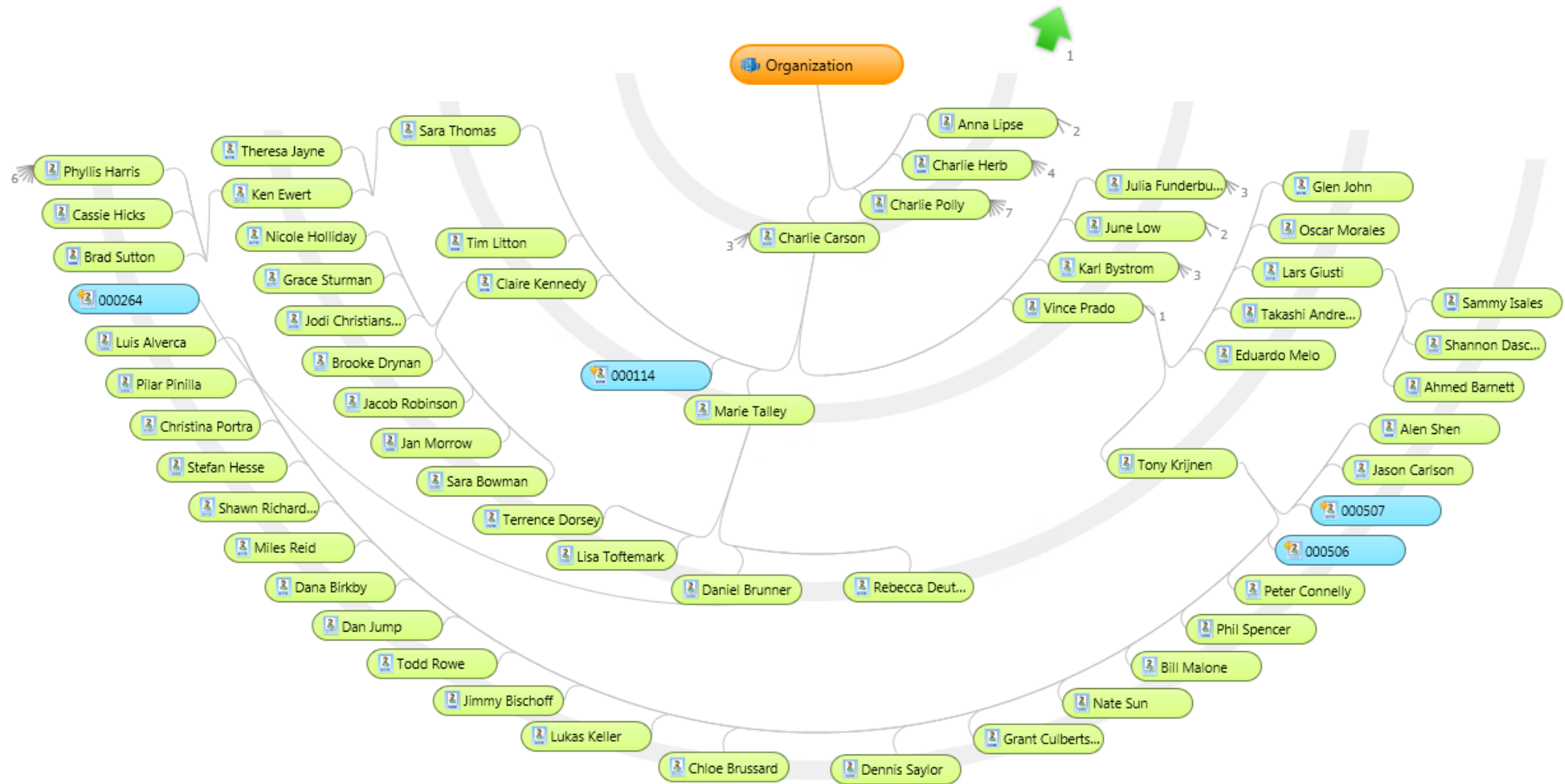
Buttons at the bottom: Save and close, Cancel.

#2 – Types of Form Workflows

- Required
 - Project Timesheets
 - Expense Reports
 - Purchase Requisitions
 - Project Quotes
- “Use it or lose it”
 - Free Text Invoices
 - AP Invoice
- Hooked in
 - Journals
 - Budget Codes
- Parameter
 - Purchase Orders
 - Project Invoices (R2+)

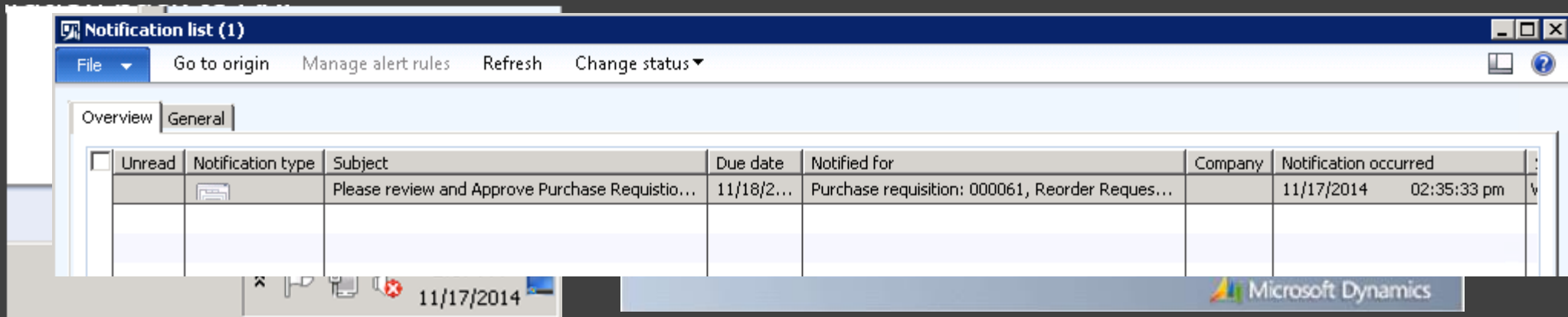


#3 – Assignment Types



#4 - Notifications

- All work items create a notification.
- You can configure more notifications per work item!
- Notifications can be emailed
 - No Out of the Box workflow email integration back to AX.



#5 – Work List

Microsoft Dynamics AX - Demo [YMLABDC: Session ID - 18] - [1 - usmf - initial]

USMF > Home > Role center

File

Role center

Personalize this page

Personal

Activities

Add Cue Manage Cues

Quick links

Add links Manage links

Work list

Please review and Approve Purchase Requisition 000061

Subject	Document type	ID	Due date	From	Creation date
Please review and Approve Purchase Requisition 0000...	Purchase requisition	Purchase requisition: 000061, Reorder Request 00001	11/18/2014 12:35:00 PM	tom	11/17/2014 12:35:33 PM



Actions

- Preview
- Approve
- Reject
- Request change
- Delegate
- Recall
- View history
- Mark as read
- Open Purchase requisition










#6 - Escalation

Properties

 **Review purchase requisitions 1** 





Assignment: None
Subject:
Instructions:



 Assignment type: Selected assignment type 'None' is not supported. 1/3


 Basic Settings
 Assignment
 **Escalation**
 Automatic actions
 Notifications
 Advanced settings

Specify how to escalate overdue work items

☒ Use escalation path

 Add escalation  Remove  Up  Down

Escalation path	Escalate to	Time limit
 User	brian	4 hour(s)
 User	andrew	4 hour(s)

 Action: Reject

Assignment type

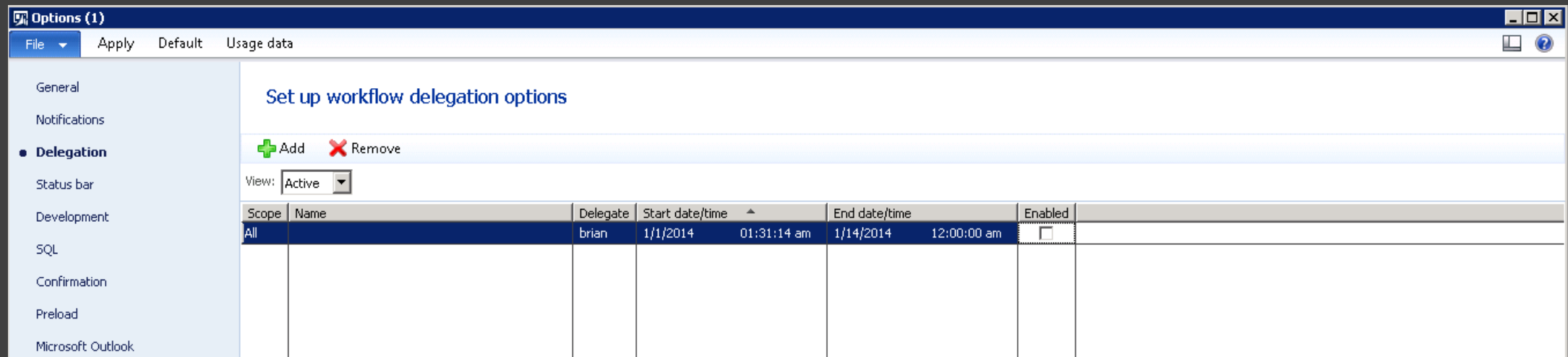
Assign users to this workflow element

Hierarchy	User: Assign to any Microsoft Dynamics AX users
Workflow user	
User	
None	

Close

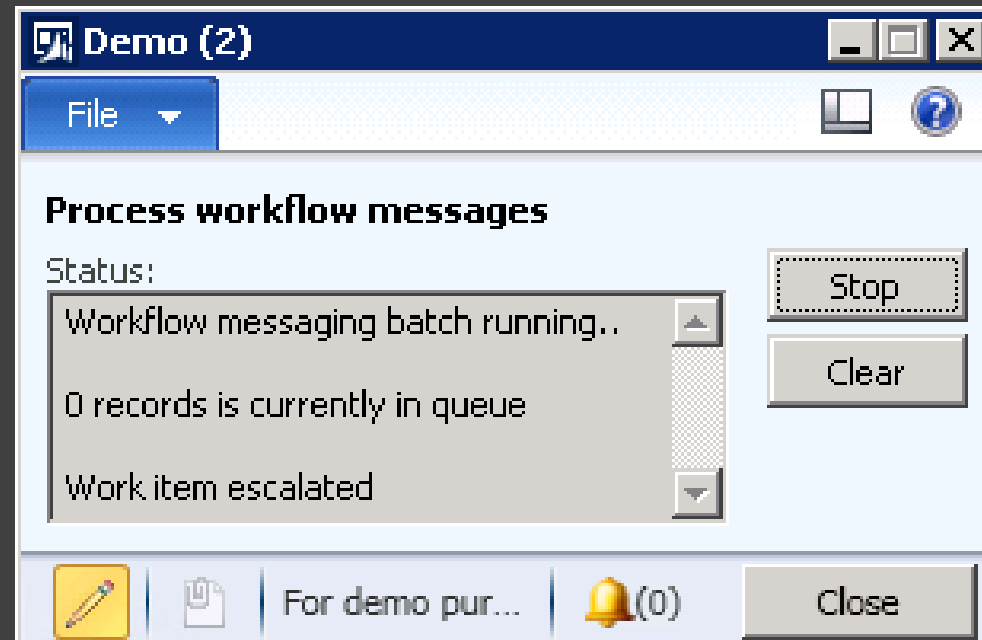
#7 - What do I do when I'm out of the office?

- Set your auto delegation.
 - File > Tools > Options > Delegation.

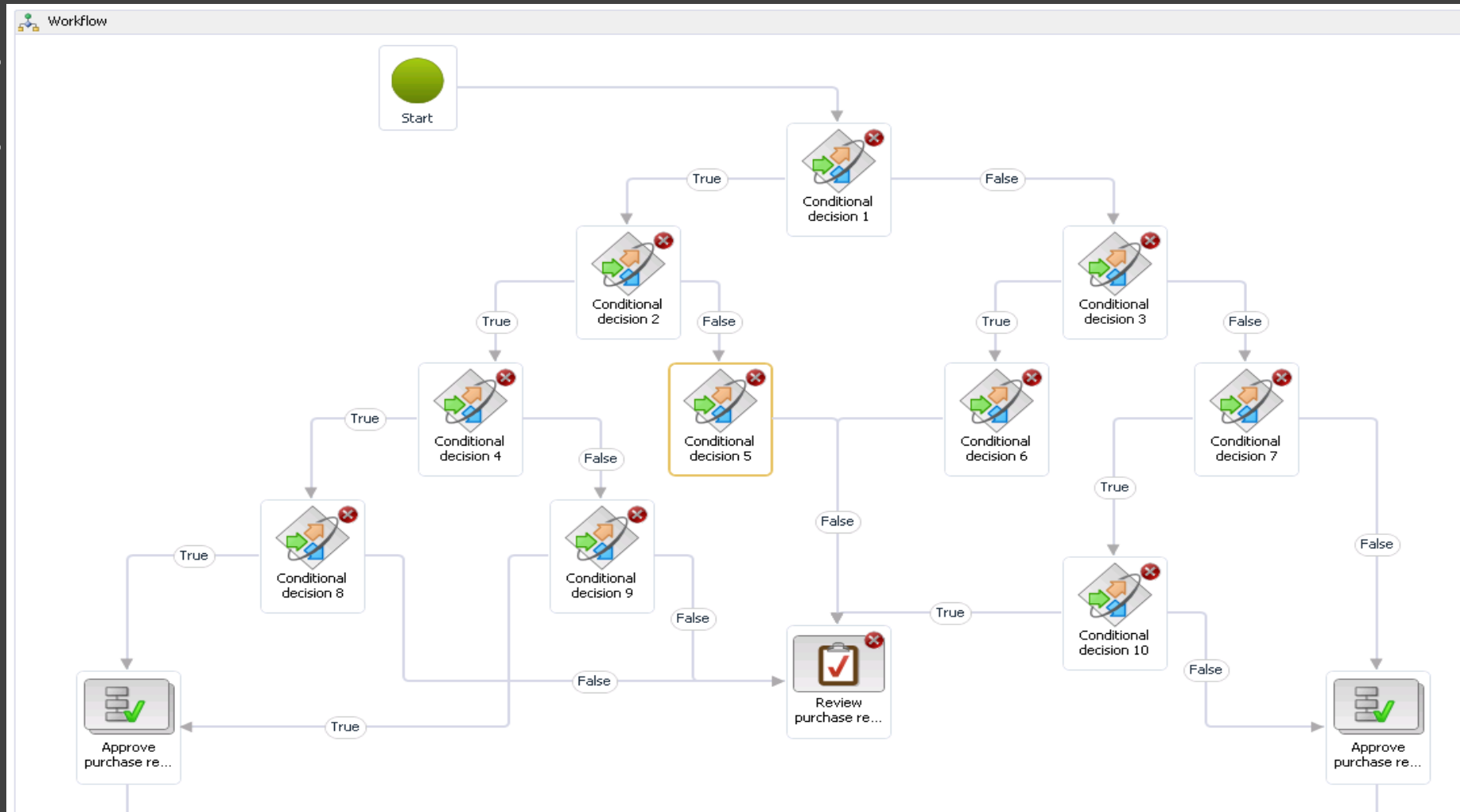


#8 – Demo Processor

- Used for Testing or Demonstrations
 - AOT > Forms > Tutorial_WorkflowProcessor
- Not for use in a Production Environment
 - Do not use the “Clear” button.



#9 – Workflow Size Recommendations?



#10 - Bonus Tips

- Have a Workflow Admin
- Workflow History
- Workflow Parameters
- Does a Developer need to configure workflow?
- Extendable to any form.
- How do you know if a module has out of the box workflows available?
- Workflow works with Enterprise Portal



QUESTIONS



Wrap-up



Obrigado!

