

Tectura Workflow Management Overview

Enabling you to optimise team work and streamline processes

Improving Productivity Through Improved Processes

Businesses today need more than common organisational handbooks to set up and control processes. Tectura® Workflow Management, an add-on solution for process management and process design, can help. With Tectura Workflow Management, you can easily and dynamically set up processes, along with the associated business logic and dependencies, directly within Microsoft Dynamics NAV.

Plus, you can use a powerful design tool like Microsoft Visio to simplify complex process design. Microsoft Dynamics NAV can then execute your processes based on events and conditions that you define, thereby automating the creation of tasks and directing them to workflow teams.

Highlights

- Automate business processes based on defined conditions and events
- Enable employees to work more efficiently with parallel processes
- Define and manage processes within Microsoft Dynamics NAV
- Design complex processes with ease using Microsoft Visio
- Reduce errors and gain better process control with field security
- Stay focused and informed with e-mail and SMS integration
- Gain flexibility and transparency from anywhere in the workflow process
- Minimise the time required to introduce new employees due to standardisation
- Enjoy flexibility without customisations and stay ahead with the market

With Tectura Workflow Management, you can be assured that these tasks are completed according to your business rules and within a defined timeframe.

Tectura Workflow Management also allows you to set up processes dynamically, without having to program your software. This prevents your system from becoming obsolete, while eliminating the need for time consuming customisation. Such flexibility also ensures processes are followed according to your most recent business rules and allows you to respond quickly to a changing market.

By using Tectura Workflow Management, you can streamline and automate your processes, while providing employees with a tool to help them organise their daily work. The result is a team that works together faster and more efficiently.

Key Functionality and Benefits

Enhance your security system and reduce errors with field security

Tectura Workflow Management allows you to define user and role based permissions for all tables and fields in your database. This improves system security and helps reduce the potential for errors.

Leveraging an easy to use matrix form, you can enhance the standard Microsoft Dynamics NAV permission system by setting up change permissions field by field. Whenever a restricted field is changed, the system will check the privileges of the respective user. Should they not be sufficient, the system will produce an error message, and all changes will be reverted back.

Boost your efficiency with process management

Process management functionality enables you to define a business process within Microsoft Dynamics NAV based on events and conditions. If a certain scenario occurs, the system will automatically create tasks and forward them to the responsible teams. Upon completion of a task, the system will check associated conditions and notify the user if the business rules have been violated.

By setting up predecessor / successor relations for a workflow, you can ensure that all prerequisites are fulfilled before certain tasks are issued. Once a task is issued to a team, users are automatically notified by the system. They can start working right away by simply clicking on the task, thus eliminating the need for time consuming navigation through the system.

The workflow portal within Tectura Workflow Management is a perfect tool to monitor and manage your workload. All of your tasks are listed together with their current status, deadline, and a detailed description. The system will monitor the business rules upon completion of a task. If the rules are violated, processing will be halted until you have fulfilled all exit conditions for the respective task.

Enjoy rich functionality, transparency and visibility anywhere within the workflow

The workflow context menu gives you access to rich functionality and can be accessed in Microsoft Dynamics NAV from any form - such as customer card, item card, sales order, etc. Likewise, the workflow explorer offers you critical visibility by allowing you to monitor any process in the system.

Each record in the system can be forwarded or placed on hold for future review. In addition, you can attach any kind of document to any data item in the system, including customers, items and bill of materials.

Take advantage of easy process design with 'drag and drop' via Microsoft Visio integration

In addition to defining and setting up processes within Microsoft Dynamics NAV, you can design processes using Microsoft Visio. Special templates are provided that allow you to easily create a process and export it directly to Microsoft Dynamics NAV. This will help you manage complex workflows and makes it a perfect tool to help you with company certifications, like ISO, that require processes to be documented.

Using Visio, you can set up organisational charts that in turn create the organisational structure for the workflow system. When the organisational chart is exported to Microsoft Dynamics NAV, workflow teams are automatically created. In addition, you can easily create complex processes by combining the different workflow shapes within Visio and then exporting your sheets to Microsoft Dynamics NAV.

Supported Platform

The requirements for the Microsoft Dynamics NAV server are a Microsoft Dynamics NAV database 3.70b or higher, with Microsoft Dynamics NAV 3.70 or 4.00 executables, running on Microsoft Windows 2000 Server or Microsoft Windows Server 2003. Both the native Microsoft Dynamics NAV database format and the Microsoft SQL Server database are supported.

For More Information

To learn more about Tectura Workflow Management contact us on:

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