Workflows and Approvals

Do you enjoy remembering to bug a teammate for an approval? How about chasing down a piece of paper to see who all has reviewed it so far? Tired of remembering to let a manager know when a certain type of transaction happens? Say goodbye to these non-value added activities and invoke the power of workflows, already embedded into your Microsoft Dynamics 365 Business Central / NAV system. You'll be truly excited to add this automation tool to your daily work, but be warned, improper setup of workflows can cause a lot of issues and unhappy co-workers. We'll get you up and running quickly by walking through the setup and configuration with plenty of hands-on time, and demonstrate how you can use this multi-faceted tool for automating common tasks like postings and approvals, show how you to build in processing rules and criteria, and take advantage of the preconfigured workflows included in your system.

Class topics
- Documents
- Workflow Setup
- Approvals
- Notifications

Who Should Attend?
Managers in any department and IT Professionals looking to reduce paper, streamline common transactions and postings, and add an additional level of segregation of duties and controls to their operations.

Learning Objectives:
At the end of this class, participants will be able to:

- Identify opportunities to replace paper documents and paper-based processes
- Set up a workflow
- Set up workflow rules
- Leverage pre-configured workflows

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: None

Advanced Preparation: Each student will receive via email connection instructions to their individual virtual classroom link and hands-on practice environment shortly before class. Connections to both resources should be tested before class. We recommend using a second monitor while attending class.

Delivery Method: Group Internet-based

CPE Credits: By participating in this class, you are eligible to earn up to 4 CPE credits which will be distributed following class completion. In order to be awarded the full credit hours, you must notify your

instructor of your intention to request credit before the start of the first class. To receive CPE credit, you must be present and actively engaged, which will be verified using polling questions and other means. You will not receive CPE credit for any portion of the class that you do not appear fully engaged.

Version: This class is taught in Microsoft Dynamics 365 Business Central.

Learning environment: As experienced trainers of adult learners, we understand how to make training "stick". We use proven practices to make sure you retain what you learn and are fully equipped to immediately apply what you discovered in class. Each day, you will spend more than 50% of your time doing hands-on exercises in our simulated learning environment.

Refund and Cancellation Policy: Please refer to our Refund and Cancellation policy here.