



Demo script – Workflow Mobile App draft

Microsoft Dynamics 365 FO



Axnosis

Demo script – Workflow Mobile App

Microsoft Dynamics 365 FO



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## Foreword

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Workflow is the sequence of industrial, administrative, or other processes through which a piece of work passes from initiation to completion.

To assist the process, a mobile app exists to support offline functionality and engages directly with Dynamics 365 FO.

## Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR

Table 1: Related Documentation

## Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY
09/09/2022	2	KRISTIAN JORDAAN	RIAAN VAN DER BERG

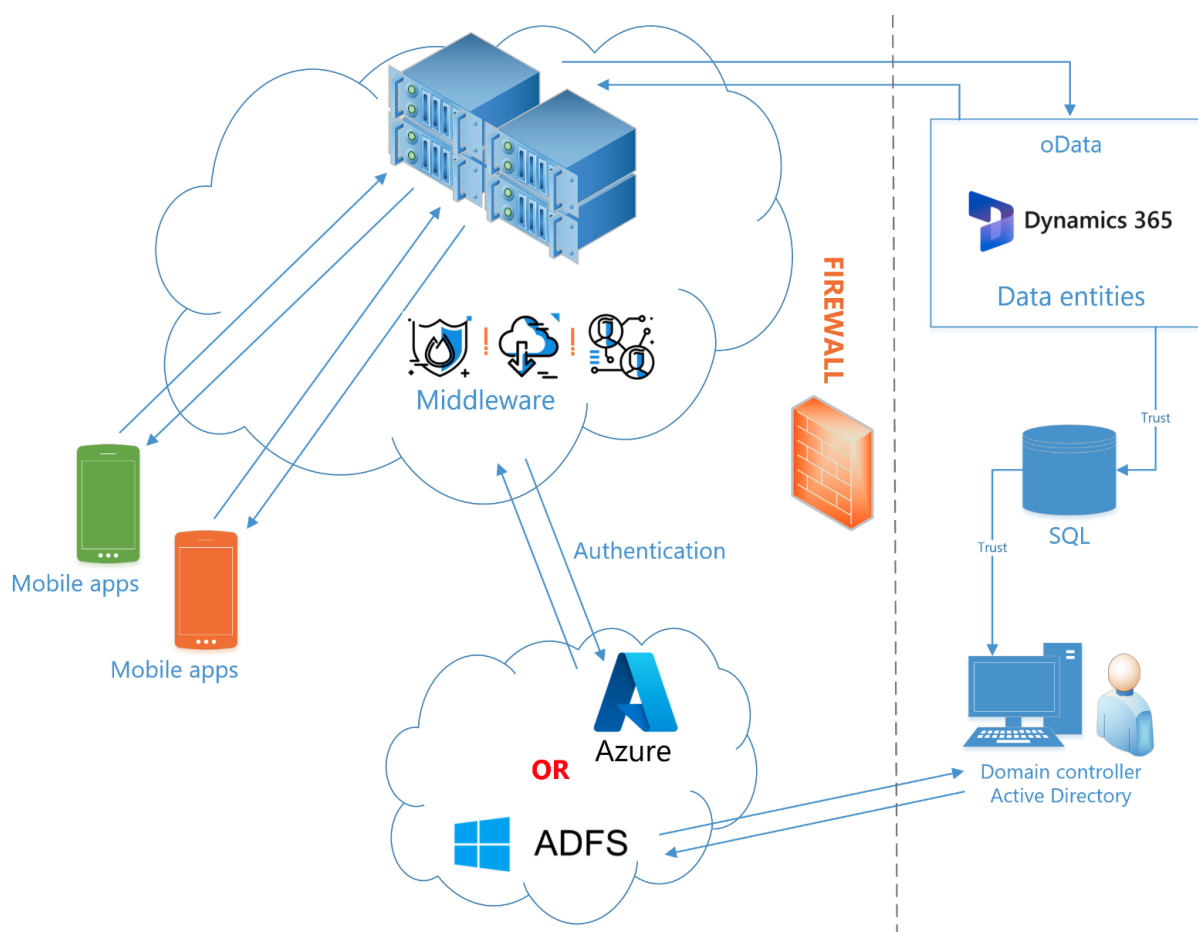
Table 2: Change and Version History

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## 1. Technology

- Microsoft Dynamics 365 (D365 for Finance and Operations)
  - GRC module
- Axnos middleware
- Ionic/Angular standalone applications
  - Workflow mobile application



## 2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Workflow mobile app.
- The apps support both platforms



- The apps can be downloaded from:
  - Android: Google Play store
  - iOS: TestFlight
- The user must have a valid D365, for Finance and Operations, license:
  - Environment: Same D365 environment as used for transacting
  - Company: Defaults to the user setup in D365
- The users should be able to successfully login to the app by using the same login details as used for D365 for Finance and Operations. The relevant restrictions and legal entity allocations on D365 for Finance and Operations will be applied on the mobile app sessions. The same user security roles will permit/exclude the user's right to capture events on the app.
- Whenever a new app update is required to be installed on the mobile phone, first ensure:
  - Previous app installations are uninstalled
  - Clear the mobile phone's cache (Android)
  - Remove all previous downloads of the application from the phone's download folder
  - Re-install the application and use

## 2.1 Background

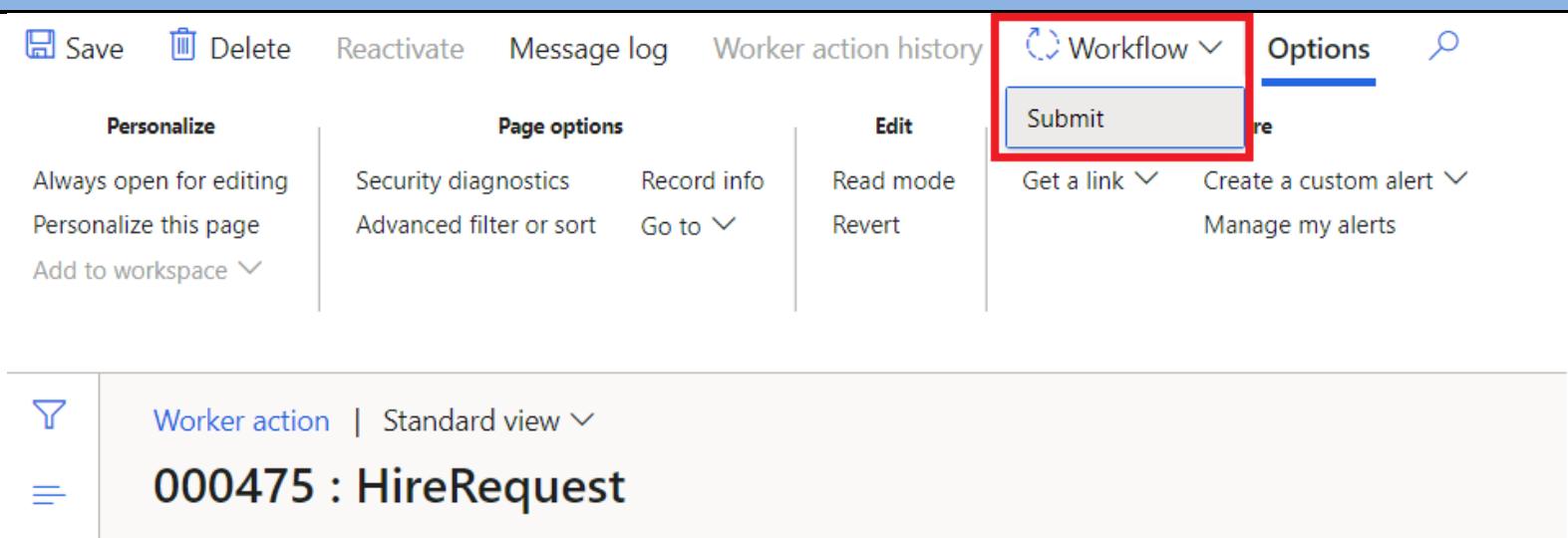
Axnosis Workflow Mobile App is a fully featured mobile solution for Microsoft Dynamics 365 F&O that works with all workflow types. Users can action and delegate their workflow items on the go. With the power of mobility and real time data in their pocket.

See all your approved, rejected, and rerouted workflow requests including recent actions that you have taken. View the complete history of any request including its details, prior actions taken, due dates, comments, and questions with our Dynamics 365 workflow mobile app.

- It is assumed that the D365 GRC module is installed on D365.


## 3. Demo script






### 3.1 Create a Workflow item in D365

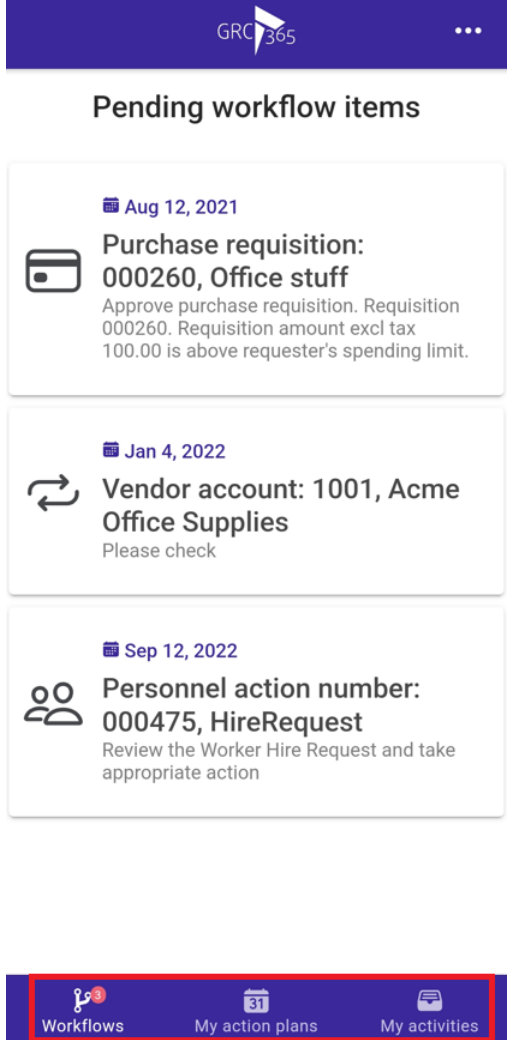
TALKING POINTS AND STEPS	DYNAMICS 365
<p>This is one example of creating a workflow item in D365.</p> <ul style="list-style-type: none"> <li>Go to: <b>HR&gt;Workers&gt;Workers</b></li> <li>In the Action pane, click on the <b>new</b> button</li> <li>Complete the dialog and click on <b>Continue</b></li> <li>On the <b>Worker action</b> form, click on the <b>Workflow</b> button and click on <b>Submit</b></li> <li>On the dialog, enter a comment and click on <b>Submit</b></li> </ul>	 <p>The screenshot shows the Dynamics 365 interface for a 'Worker action'. The top navigation bar includes 'Save', 'Delete', 'Reactivate', 'Message log', 'Worker action history', 'Workflow' (highlighted with a red box), and 'Options'. Below the navigation bar, there are three sections: 'Personalize' (with 'Always open for editing', 'Personalize this page', and 'Add to workspace'), 'Page options' (with 'Security diagnostics', 'Record info', 'Advanced filter or sort', and 'Go to'), and 'Edit' (with 'Read mode' and 'Revert'). The main content area shows 'Worker action   Standard view' and '000475 : HireRequest'.</p>

TALKING POINTS AND STEPS	DYNAMICS 365																								
<p>The workflow item will appear on the D365 login screen of the user that has to action the workflow.</p> <p>When the user clicks on the work item, the “<b>Work items assigned to me</b>” list page will open.</p>	<div><div><div>&lt; September 2022 &gt;</div><div>Su Mo Tu We Th Fr Sa</div><div>1 2 3</div><div>4 5 6 7 8 9 10</div><div>11 12 13 14 15 16 17</div><div>18 19 20 21 22 23 24</div><div>25 26 27 28 29 30</div></div><div><div>Work items assigned to me ^</div><div><div>Approve purchase requisition %Purchas...</div><div>Please check</div><div>Worker Hire Request</div></div></div><div><div>Work items assigned to me   000475 : HIREREQUEST</div><div>Standard view v</div><div><div>Filter</div><table><tr><th>ID</th><th>Subject</th><th>Document type</th><th>Due date time</th><th>From</th><th>Created date an</th></tr><tr><td>Personnel action number: 00047...</td><td>Worker Hire Request</td><td>Action state</td><td>9/12/2022 12:19:00 PM</td><td>Kristian</td><td>9/9/2022 12:19:3</td></tr><tr><td>Vendor account: 1001, Acme Off...</td><td>Please check</td><td>Vendors</td><td>1/4/2022 2:49:00 PM</td><td>Riaan.vanderBerg</td><td>1/3/2022 2:49:23</td></tr><tr><td>Purchase requisition: 000260, Of...</td><td>Approve purchase requisition %...</td><td>Purchase requisitions</td><td>8/12/2021 7:26:00 AM</td><td>Riaan.vanderBerg</td><td>8/9/2021 7:26:25</td></tr></table></div></div></div> <div><div>Activity manager</div><div>Environmental management</div><div>Product readiness for process manufacturing</div><div>Advance case manager</div><div>Expense management</div><div>Product variant model definition</div><div>Bank management</div><div>Facility management</div><div>Production floor management</div><div>Benefits</div><div>Feature management</div><div>Project management</div></div>	ID	Subject	Document type	Due date time	From	Created date an	Personnel action number: 00047...	Worker Hire Request	Action state	9/12/2022 12:19:00 PM	Kristian	9/9/2022 12:19:3	Vendor account: 1001, Acme Off...	Please check	Vendors	1/4/2022 2:49:00 PM	Riaan.vanderBerg	1/3/2022 2:49:23	Purchase requisition: 000260, Of...	Approve purchase requisition %...	Purchase requisitions	8/12/2021 7:26:00 AM	Riaan.vanderBerg	8/9/2021 7:26:25
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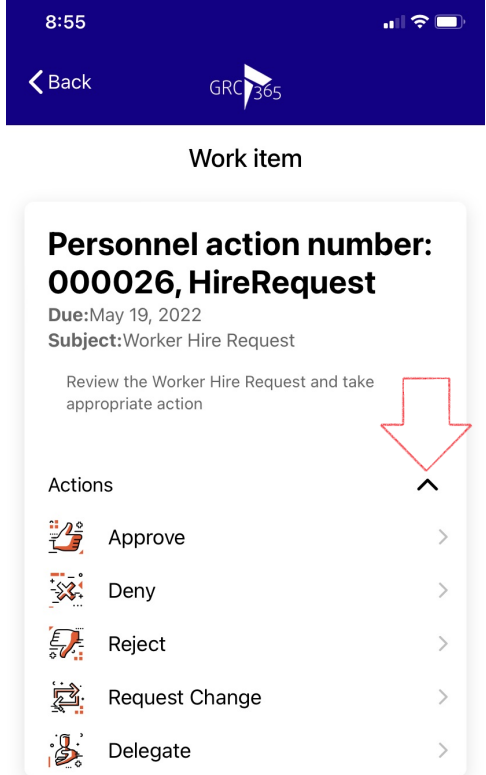
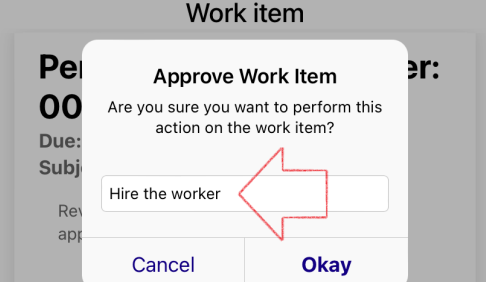
## 3.2 Log into the Workflow app

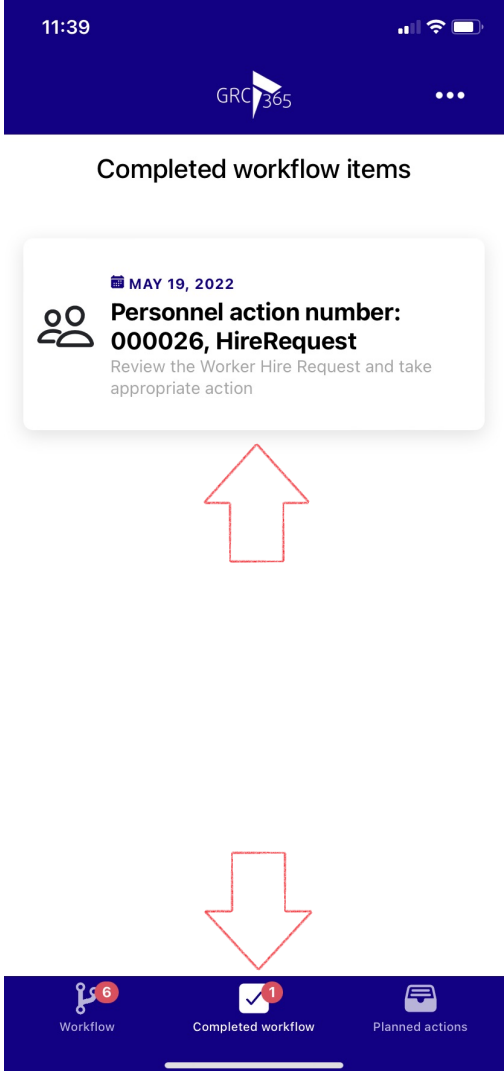
TALKING POINTS AND STEPS	MOBILE APP
<p>The user takes out his/her mobile phone and taps on the <b>Workflow</b> icon.</p>	

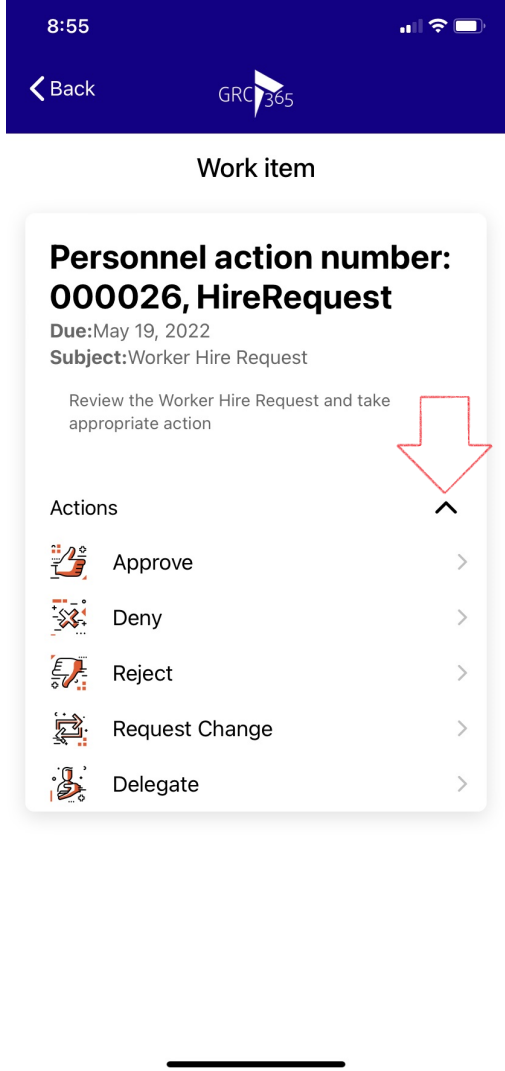
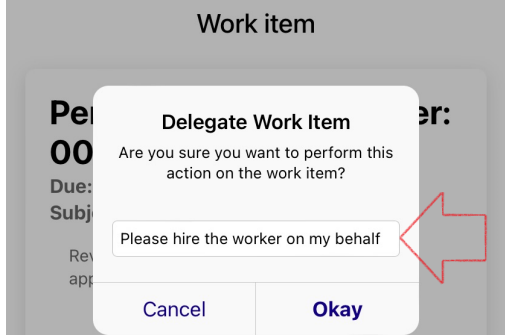
TALKING POINTS AND STEPS	MOBILE APP
<p>The logo on the <b>login</b> screen appears ...</p> <p>The user's D365 login details (<b>Username</b> and <b>Password</b>) are entered and used by the app for validation.</p> <p>The user then taps on the <b>Login</b> button to log into the app session.</p>	   <p><b>D365 F&amp;O Workflow App</b></p> <p>The convenient way to action workflow &amp; manage activities while on the move</p> <div>  kristian.jordaan@axnosis.com         </div> <div>  .....         </div> <div> <div>FORGOT</div> <div>LOGIN</div> </div>

TALKING POINTS AND STEPS	MOBILE APP
<p>The <b>Pending workflow items</b> screen opens.</p> <p>At the bottom of the screen:</p> <ul style="list-style-type: none"> <li>• The number of Workflow items that are pending your approval is indicated in a <b>red dot</b></li> <li>• The <b>Completed workflow</b> items can be viewed</li> <li>• All <b>Planned actions</b> for the logged in user are displayed</li> </ul> <p>Tap on the item that you want to change the workflow status of.</p>	

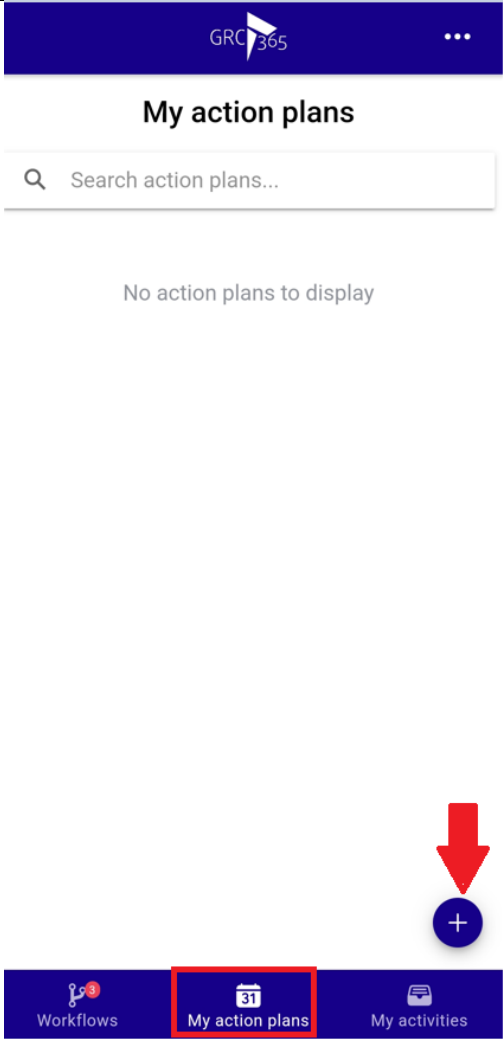
### 3.3 Approving/rejecting/delegating Workflow via the D365 Workflow mobile app

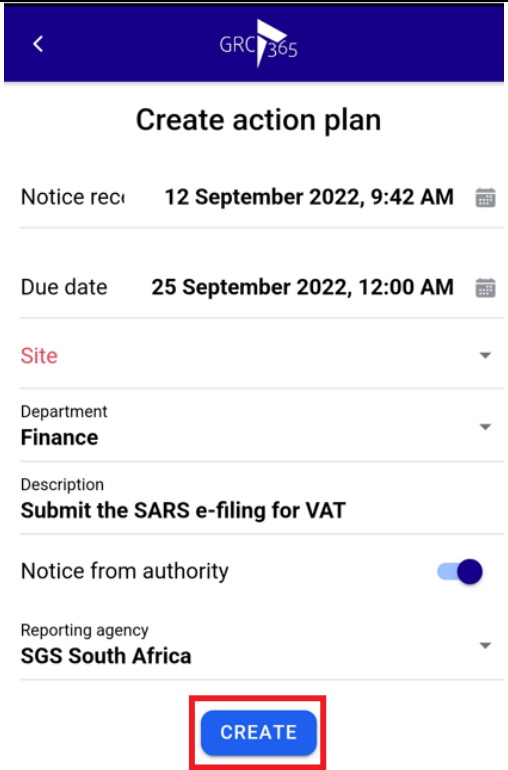
TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the <b>Actions</b> drop-down arrow and select the relevant action from the list. – which in this example will be to <b>Approve</b>)</p>	
<p>Enter a reason for the action.</p> <p>Click on <b>Okay</b>.</p>	

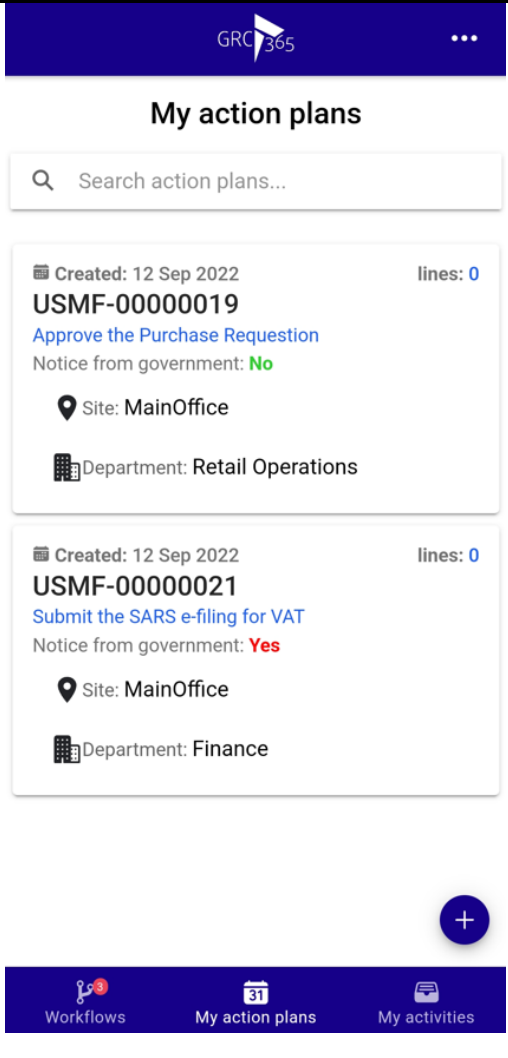
TALKING POINTS AND STEPS	MOBILE APP
<p>The actioned workflow item will disappear from the <b>Pending workflow items</b> screen and appear on the <b>Completed workflow items</b> screen for a short while.</p>	 <p>The screenshot shows the mobile app interface. At the top, the status bar displays the time 11:39 and signal/battery icons. Below this is a dark blue header with the text 'GRC 365' and a menu icon. The main content area is titled 'Completed workflow items'. A card displays a date 'MAY 19, 2022', a personnel icon, and the text 'Personnel action number: 000026, HireRequest' followed by the instruction 'Review the Worker Hire Request and take appropriate action'. A large red arrow points upwards towards the card. Another large red arrow points downwards towards the bottom navigation bar. The navigation bar at the bottom has three items: 'Workflow' with a red badge '6', 'Completed workflow' with a red badge '1', and 'Planned actions'.</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the workflow item that you want to delegate to another user.</p> <p>Tap on the <b>Actions</b> drop-down arrow and select <b>Delegate</b> from the list.</p> <p>Select the name of the person that you want to delegate the work item to.</p>	
<p>Enter a reason for the action.</p> <p>Click on <b>Okay</b>.</p>	

## 3.4 Creating an action plan via the D365 Workflow mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>To create a new action plan go to the <b>My Action plans</b> button, <b>Tap</b> on the <b>+</b> button at the bottom of the screen.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>Fill in the following information to create the action plan:</p> <ul style="list-style-type: none"> <li>• <b>Notice received:</b> The date that a notice was received from a governing authority.</li> <li>• <b>Due Date:</b> The date that the action is due, along with the time.</li> <li>• <b>Site:</b> The site where the action is due, along with the time.</li> <li>• <b>Department:</b> The department which is responsible for the action.</li> <li>• <b>Description:</b> A short the description of the action that needs to be performed.</li> <li>• <b>Notice from authority:</b> Tick the toggle switch as <b>yes</b> if a notice was received by a governing authority.</li> <li>• <b>Reporting Agency:</b> Select which agency needs to be reported to for this action.</li> </ul> <p>Tap on the <b>Create</b> button.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>The newly created action plan (and all other action plans for which you are the employee responsible) will appear on the <b>My Actions plans</b> tab with a summary of the details being displayed.</p>	

### 3.4.1 Viewing an action plan created through the “mobile app” in D365

TALKING POINTS AND STEPS

Go to **GRC>Action Plan** to view the list of action plans for the legal entity.

To view the **action plan**, click on the relevant hyperlink.

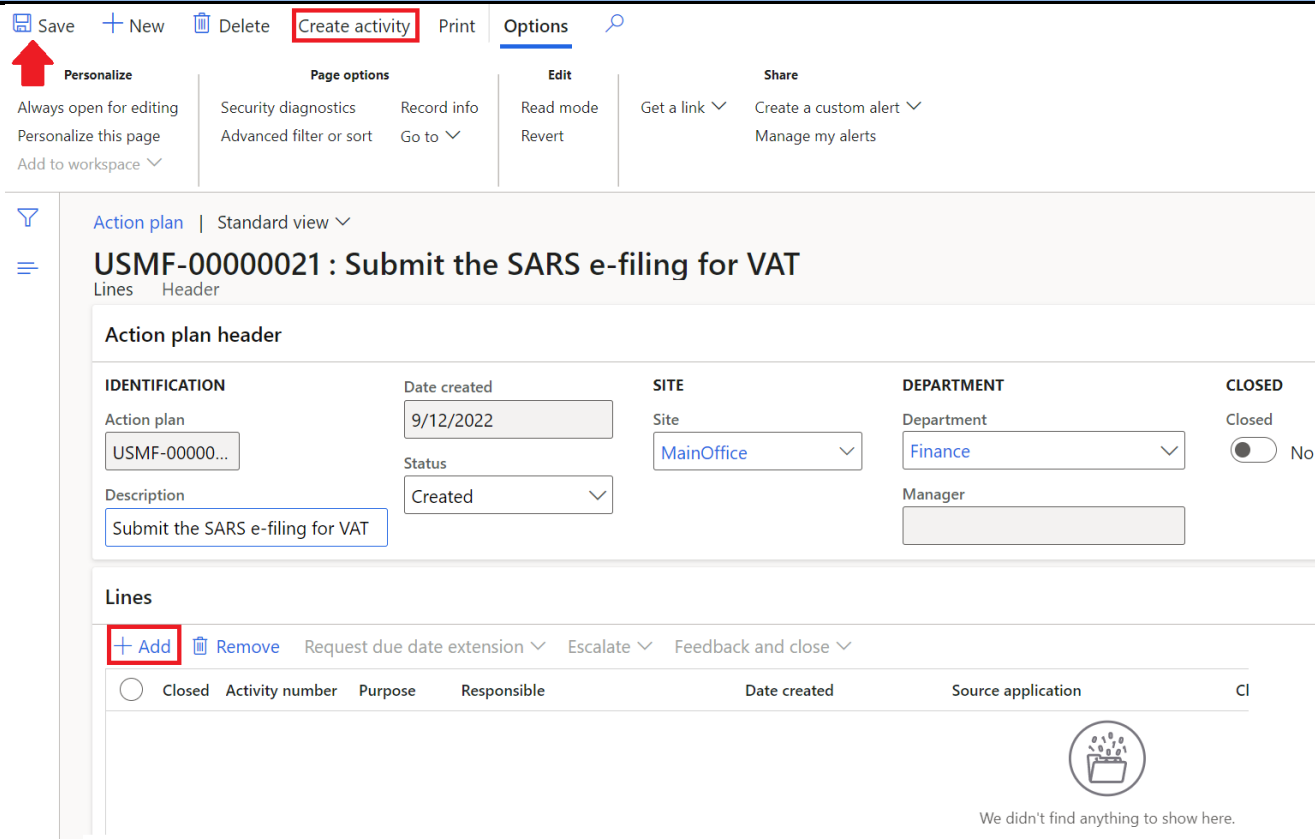
Action plan

Standard view

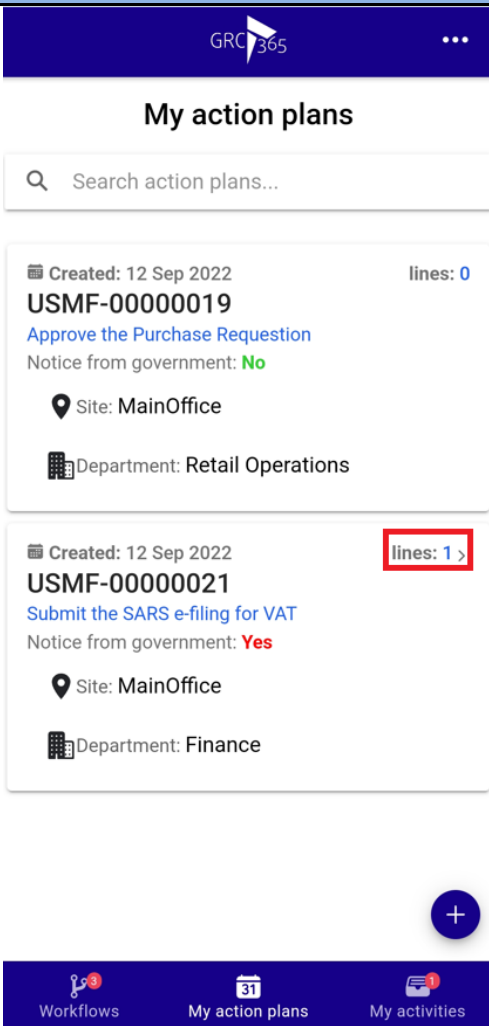
Filter

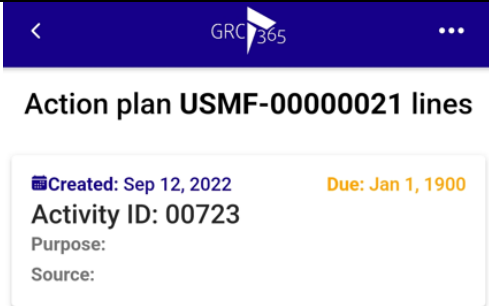
		Action plan	Description	Closed	Site	Department	Status
		000001	Action plan		2	Operations	Created
		USMF-0000...	BBS Action plan		MainOffice	Operations	Created
		USMF-0000...	Incident followup Action plan		MainOffice	Head Office	Created
		USMF-0000...	Monitoring and measurement A...		MainOffice	Head Office	Created
		USMF-0000...	Operational risk		MainOffice	Head Office	Created
		USMF-0000...	LIT		1	Client Services	Created
		USMF-0000...	Environmental incidents				Created
		USMF-0000...	Government inspection		007	Bulawayo Clinic	Created
		USMF-0000...	Brand standards		2	Finance	Created
		USMF-0000...	Notice from Dozl		3	IT Department	Created
		USMF-0000...	Approve the Purchase Requestion		MainOffice	Retail Operations	Created
		USMF-0000001	Submit the SARS e-filing for VAT		MainOffice	Finance	Created

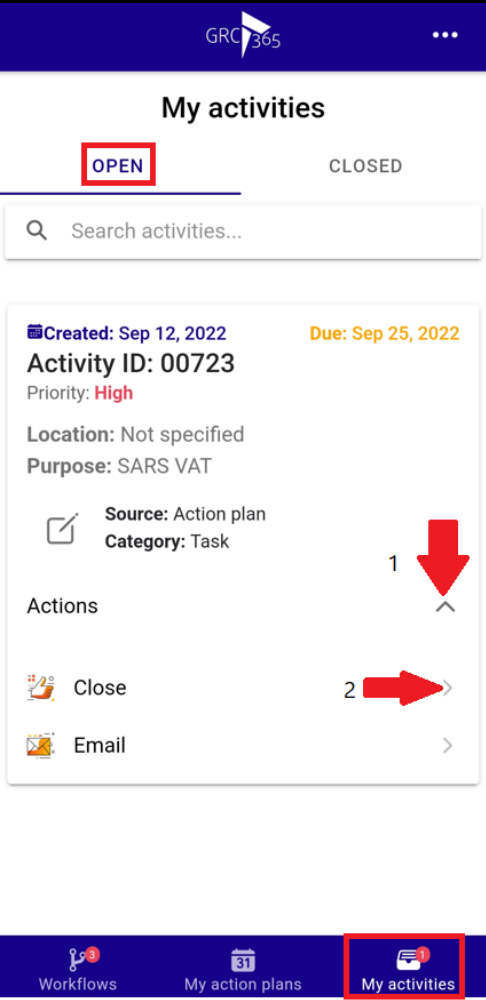
### 3.5 Create an activity in D365

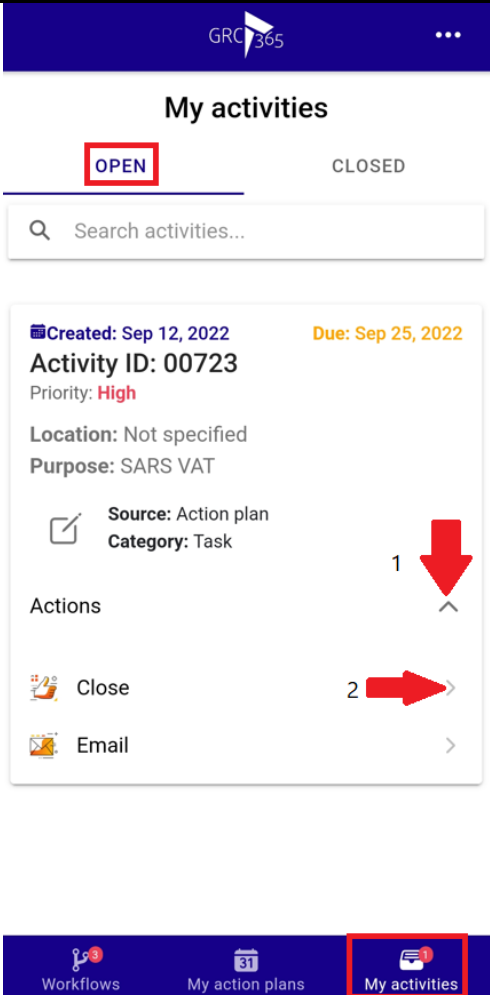
TALKING POINTS AND STEPS	DYNAMICS 365
<p>The line details of the <b>Action plan</b> will open. To add additional lines to the action plan, click on <b>Create activity</b> on the Action Pane.</p> <p>Fill in the dialogue box that opens on the right. Once all the details are filled in, click on the <b>Ok</b> button to create the activity.</p> <p>To add any additional activities to the <b>Action plan</b>, click the <b>+Add</b> button and the select the relevant activity.</p> <p>Lastly, click the <b>Save</b> button to update the record.</p>	

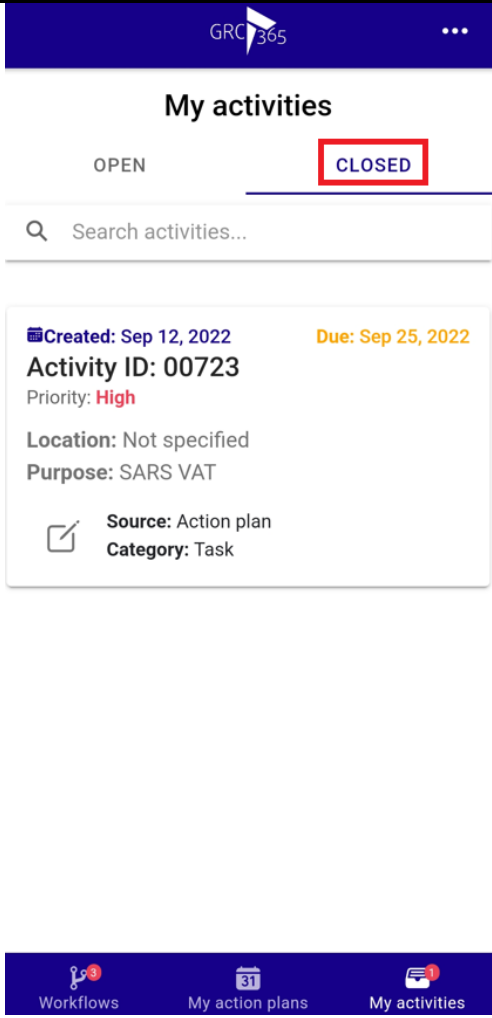
## 3.6 Viewing and editing the activity created in D365 via the D365 Workflow mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>To view the detail of an activity linked to an action plan, tap the <b>right-angle bracket</b>.</p>	

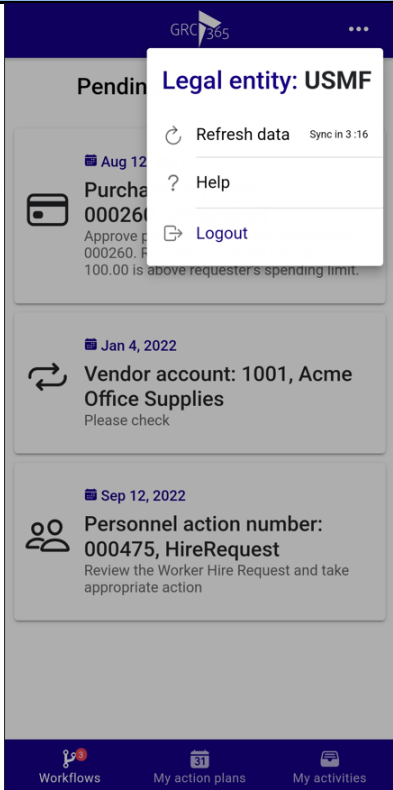
TALKING POINTS AND STEPS	MOBILE APP
<p>To view the detail of an activity linked to an action plan, tap the <b>right-angle bracket</b>.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>To view all the activities the user is responsible to do, go to the <b>My activities</b> tab.</p> <p>Two views exist:</p> <ul style="list-style-type: none"> <li>- <b>Open:</b> All activities that still need to be done.</li> <li>- <b>Closed:</b> All finished activities.</li> </ul> <p>To close an activity, firstly tap on the <b>bottom-angle bracket</b> to allow for the following options:</p> <ul style="list-style-type: none"> <li>- <b>Close:</b> Mark the action as done</li> <li>- <b>Email:</b> To send a notification of the activity to another user.</li> </ul> <p>Tap on the <b>right-angle bracket</b> next to the close option.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>To view all the activities the user is responsible to do, go to the <b>My activities</b> tab.</p> <p>Two views exist:</p> <ul style="list-style-type: none"> <li>- <b>Open:</b> All activities that still need to be done.</li> <li>- <b>Closed:</b> All finished activities.</li> </ul> <p>To close an activity, firstly tap on the <b>bottom-angle bracket</b> to allow for the following options:</p> <ul style="list-style-type: none"> <li>- <b>Close:</b> Mark the action as done</li> <li>- <b>Email:</b> To send a notification of the activity to another user.</li> </ul> <p>Tap on the <b>right-angle bracket</b> next to the close option.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>Once the activity has been closed, it will now be displayed under the <b>Closed</b> tab.</p>	

### 3.7 Viewing the options under the Ellipsis

TALKING POINTS AND STEPS	MOBILE APP
<p>The <b>ellipsis</b> at the top of the screen provides the following functions:</p> <ul style="list-style-type: none"> <li>• Displays the <b>D365 Legal entity</b> that the user is currently logged into</li> <li>• The <b>Refresh data</b> button is used to update the app with recently captured data (via the app and D365)</li> <li>• The <b>Help</b> button opens the <b>Axnosis Contact Support</b> screen</li> <li>• <b>Logout</b></li> </ul>	 <p>The screenshot shows the mobile app interface. At the top, there's a status bar with 'GRC 365' and a signal icon. Below it, a menu is open, displaying 'Legal entity: USMF' with a refresh icon, 'Refresh data' with a sync icon and 'Sync in 3:16', 'Help' with a question mark icon, and 'Logout' with a door icon. The background of the app shows a list of pending items, including a purchase order dated Aug 12, a vendor account update dated Jan 4, 2022, and a personnel action number dated Sep 12, 2022. At the bottom, there's a navigation bar with icons for 'Workflows', 'My action plans', and 'My activities'.</p>