



Version 4.0 R2

Streamlined Simplicity

Release Date: August 27th 2010

agiles is committed to continually refining agilesWorkflow to give Microsoft Dynamics NAV partners a more robust total solution. You have provided valuable feedback which we incorporated into this release. We have improved terminology so things make more sense. Additionally, we know time is money so we've found ways to simplify and expedite the setup and configuration process. We've also streamlined the user interface enabling the same capabilities in fewer clicks; and added exciting new functionality creating a richer experience for the user.

"The new features in agilesWorkflow 4.0 R2 improve our ability to implement with ease as a range of setup areas have been simplified. It also streamlines the user interface, making it even more appealing to our customers. This new release and direction reaffirms our decision to focus on agilesWorkflow." Sven Noomen, Product Manager, Qurius.

New Features

Promoted Actions: Now all To-dos, regardless of the To-do type, can be completed directly from the To-do List. This means that the number of clicks is dramatically reduced, the user saves critical time as there is even more guidance through their work.

The screenshot shows the 'Process' ribbon with the following actions: Show Source, Manually Complete, Examine Fields, Store Documents, Examine Documents, Make Decision, Update Status, and Workflow Expanded View. Below the ribbon is a 'To-do List' table with the following data:

Status	No.	Description	Reference Type Description	Keywords
	WF-000539-T0...	Attach Credit Application	Customer	35451236,Gagn & Gama
	WF-000243-T0...	Check Mandatory Fields	Item	1300,Chain Assy

With more Actions on the setup forms, it means the setup is easier and quicker.

Reference ...	Reference Type Description	Code	Description	Type	Team Code	Employee ...
27	Item	QUALITY T...	Quality Test and Attach Tes...	Document...	PRODUCTI...	
27	Item	REORDER ...	Reorder Stock	Manual Co...		BD
32	Item Ledger Entry	EXPIRED	Expired Inventory Notification	Manual Co...		DC
36	Sales Header	BOOK TRU...	Book Truck and Confirm Ti...	Manual Co...		BA
36	Sales Header	EXPORT D...	Prepare Export Documentati...	Manual Co...		BA
36	Sales Header	PKG TRAC...	Update Package Tracking No	Field Exam...		BA

Simplified Pages: Pages have been simplified such that a typical user sees only the most commonly used fields. Only the fields and actions that the user needs to focus upon according to the setup or criteria are shown. Other fields not relevant at the time are disabled, giving the user even more guidance through their work.

Edit - To-do Card - WF-000521-T0001-S18 · Send Purchase Order to Supplier

Actions | Related Information

Manually Complete | Examine Fields | Store Documents | Examine Documents | Make Decision | Update Status | Workflow Expanded View | Show Source

WF-000521-T0001-S18 · Send Purchase Order to Supplier

General

No.: WF-000521-T0001-S18 | Priority: Normal

Description: Send Purchase Order to S... | Category Code:

Reference Type Description: Purchase Header | Duration Date Calculation: 1D

Keywords: 106024,Mundersand Cor... | Start Date: 27.01.2011

Closed: | Critical Date: 28.01.2011

Completed By: | End Date (Planned): 28.01.2011

Date Closed: | Deadline Time:

Closed Manually: | In Use:

To-do Type: Manual Completion | In Use By: | In Use On: | In Use At:


Responsibility: PURCHASE | AH

To-do Textlines

To-do Details

Template ... SEND PO

Status Na... Now To-do

Status Pict... 

Notes

Click here to create a new note.

OK

Dynamic Responsibility: To-Do responsibility can now be dynamically set based of any Employee Code or Contact Code fields in the NAV tables. You no longer have to setup several Conditions to do this!

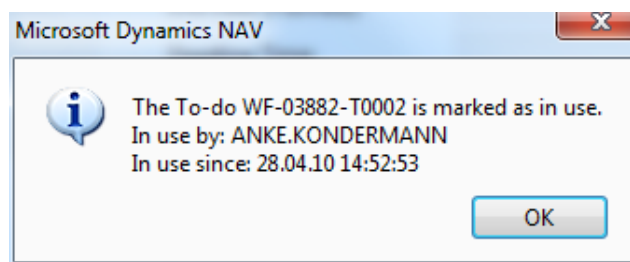
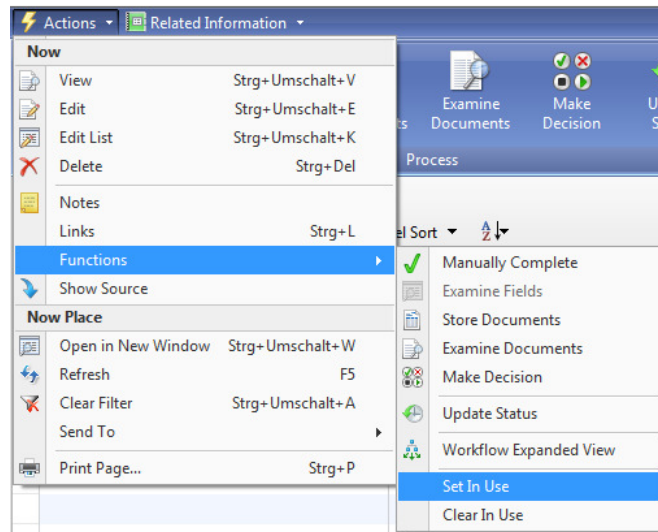
Contacts are also now included in Conditional Responsibility, giving more flexible regarding who should be emailed automatically.

Condition Code	Condition Description	Team Code	Employee Code	Contact Code
ADM DEPT	Administration Department		AH	CT000001
PROD DEPT	Production Department		RL	
SALES DEPT	Sales Department		PS	

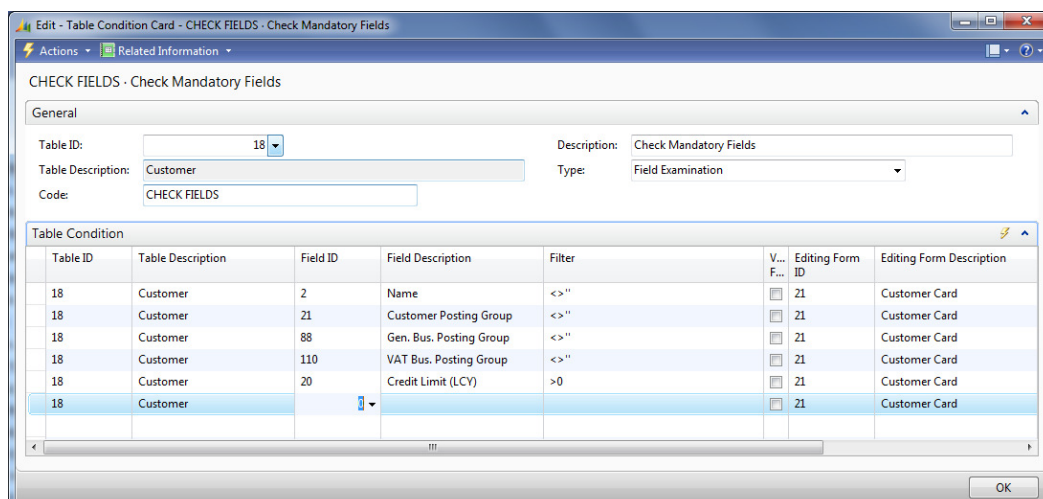
Employees and Contacts can now be re-emailed at set Intervals to ensure tasks are completed.

From Status Level	To Status Level	Description	E-mail Responsible Employees	Employee E-Mail Interval (Days)	E-mail Responsible Contacts	Contact E-Mail Interval (Days)
5	0	Now To-do	<input type="checkbox"/>		<input type="checkbox"/>	
5	2	Now To-do --> Completed	<input type="checkbox"/>		<input type="checkbox"/>	
5	4	Now To-do --> Future To-do	<input type="checkbox"/>		<input type="checkbox"/>	
5	7	Now To-do --> Critical Low	<input type="checkbox"/>		<input type="checkbox"/>	
5	8	Now To-do --> Critical	<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	

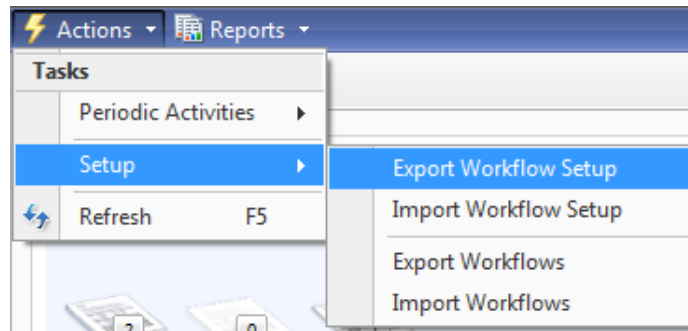
Team Work Notifications: A team member can now be automatically notified if another team member is already working on a to-do. Users can now mark their To-dos as “In-Use”, ensuring that when another team member attempts to open the to-do, they are notified that it is already in use and by whom.



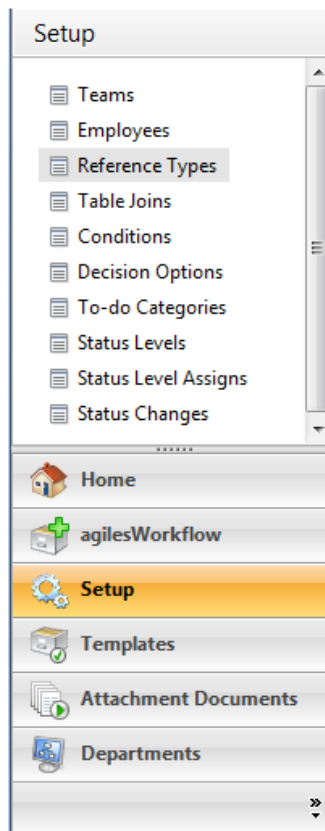
Simplified Setup: Setup fields are now defaulted into many tables for quicker agilesWorkflow configuration. For example, in the Conditions setup, you are no longer required to tick Enabled, and the Table ID and Editing Form ID default on the lines. You may still edit them manually if desired.



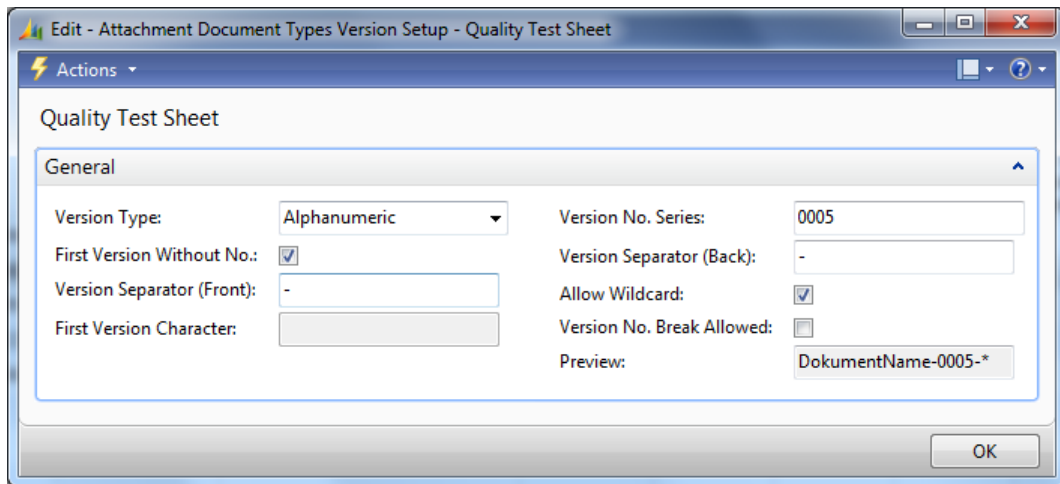
Using the new integrated XML Ports to import both the base setup and the entire workflow setup, ensures setup is always automated wherever possible.



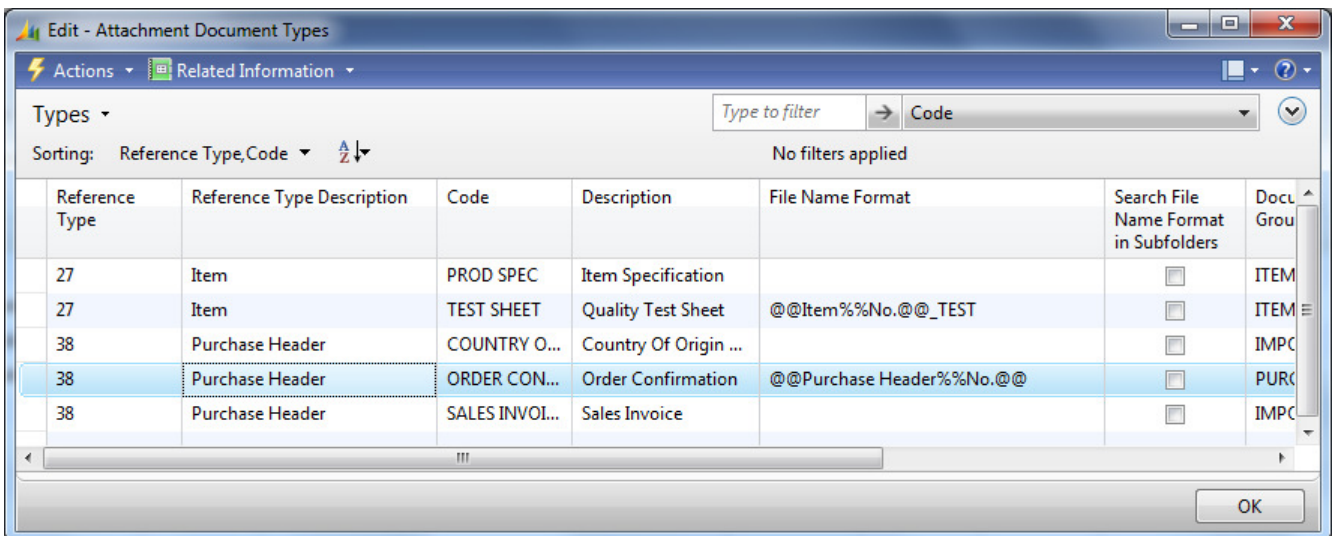
The agilesWorkflow Administrator Role Center has been redesigned for a more simplified setup experience.



Flexible Document Storage: Document version numbers can now be user-defined for Automated Document Storage when using Looping.



Automated Document Storage will now also search Sub Folders.



Captioning and Consistency: General Page redesign and captioning improvements have been done to provide users with a more consistent and clear interface, ensuring the total solution is simplified and consistent.