



COSMO CONSULT  
Business-Software for People



Business  
Software  
for People

cc | workflow management

FIELD-LEVEL SECURITY FOR IMPROVED PROCESS CONTROL

AD-HOC WORKFLOWS TO TRIGGER WORKFLOWS SPONTANEOUSLY

RELEASE MANAGEMENT | WORKFLOW TEAMS

E-MAIL INTEGRATION | DOCUMENT MANAGEMENT

WORKFLOW EXPLORER FOR STATUS MONITORING OF PROCESSES

PERIODIC WORKFLOWS

WORKFLOW PORTAL AS CENTRAL CONTROL TOOL

PROCESS MODELLING WITH MICROSOFT VISIO

PROCESS DEFINITION IN MICROSOFT DYNAMICS NAV

Microsoft Partner  
Gold Enterprise Resource Planning



COSMO CONSULT

## COMPANY PORTRAIT



COSMO CONSULT specialises in the implementation and system management of **industry and business solutions** based on cutting-edge software technologies. We deliver industry-oriented complete solutions for midsize businesses in the manufacturing, service and retail industries by providing an extensive range of industry-specific and special solutions based on **Microsoft Dynamics** and **QlikView**.

We offer our customers over 15 years of national and international project experience in the implementation of **Microsoft Dynamics NAV** (previously Navision) and **Microsoft Dynamics AX** (previously Axapta) ERP solutions. We are also experts in the **Microsoft Dynamics CRM** customer relationship management system and the **Microsoft SharePoint** document management and portal system, which can be integrated seamlessly into the ERP system environment. We therefore deliver fully integrated software systems for use in all areas of the company. With the aid of the **QlikView business intelligence solution**, our customers are able to access all of their company data in a structured and manageable format at any time.

An **implementation method** tailored to the project is a prerequisite for successful software implementation. For over 15 years, we have placed our trust in proven implementation methods when implementing our software projects, such as **SureStep** for successful ERP project implementation and the **agile implementation methodology** for rapid results when realising business intelligence (BI) projects.

At COSMO CONSULT, people are our focus. After all, it is people who decide whether our software is efficient or inefficient, who judge its strengths and weaknesses, who experience joy or frustration when using it and ultimately determine if it is a success. That's why we provide:

### Business Software for People



**OPTIMISE YOUR COLLABORATION**

cc|workflow is a dedicated solution for process management within your company. Workflows can be modelled directly in Microsoft Dynamics NAV or Microsoft Visio, together with the associated business logic and dependencies. Microsoft Dynamics NAV controls your workflows based on events and freely definable conditions.

This application helps the teams in your organisation work through their respective tasks on time and in the proper manner. Conventional organisation manuals have significant disadvantages compared with an electronic workflow solution: They very quickly become obsolete and cannot guarantee that processes will actually be performed in the manner specified by you.

Using cc|workflow can often eliminate the need to customise the standard Microsoft Dynamics NAV system to individual map business processes. Processes can be set up in the context of a new or existing installation and do not have to be programmed into the software. This means there is a high degree of flexibility, allowing you to respond quickly to new market requirements or internal organisational adaptations.

cc|workflow allows you to run processes in parallel. Your employees can organise their work better and work through their tasks more efficiently, helping to improve the quality of your products and services. Swifter processing of customer requests and increased transparency ensure greater customer satisfaction.

The system can also simplify the training of new employees; firstly, by standardising business processes and, secondly, by actively supporting the processing of tasks.

**SECURITY AT FIELD LEVEL PREVENTS ERRORS**

**Field-level security set-up**

cc|workflow allows you to define change permissions at field level for every table in the system. You can define which tables and fields are to be monitored by the system. For each field, you can define whether or not change permissions should be assigned inclusively or exclusively.

If the former, you specify only those users or roles which are authorized to make changes. If the latter, you only have to specify which users or roles are not authorized to make changes. You select the option that requires the least maintenance effort for your particular circumstances.

**Field-level security matrix**

The system offers an intuitively operated matrix form in which you can assign or revoke change permissions for fields by highlighting the corresponding cell.

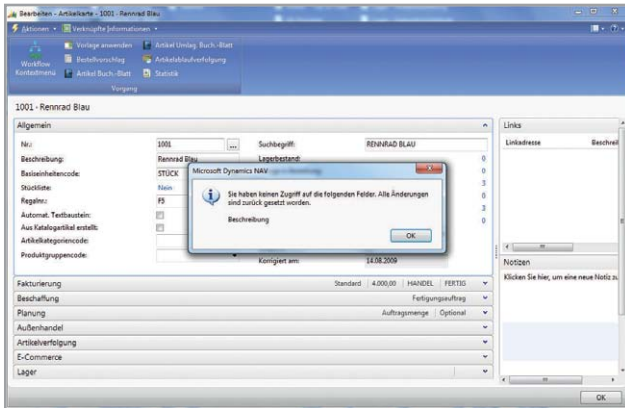
- ▶ Change permissions at field level
- ▶ Inclusive/exclusive assignment of permissions
- ▶ Field-level security matrix as intuitive set-up tool

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FIELD-LEVEL SECURITY MATRIX

## Monitoring of field-level security

If a user attempts to change the content of a field and, in doing so, violates the assigned field permissions, the system displays an information message and resets the field contents.



NOTES TO THE USER

## DEFINITION OF BUSINESS LOGIC AS A BASIS FOR PROCESSES

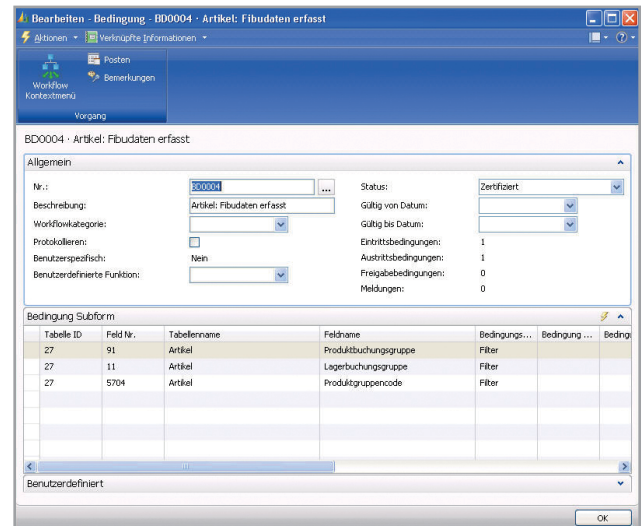
### Conditions

To guarantee that business processes are performed correctly, you must link the processing of tasks with certain conditions. In this way, you can transfer control of the performance of a process to the system. Processes are triggered either manually by users (ad-hoc workflow) or by an event in the system. If a specific event occurs, the system checks if one or more of the defined conditions are met. If they are, the system then triggers the linked processes.

As processes are completed, pre-defined tasks are generated automatically and sent to the responsible teams. These tasks are, in turn, linked with conditions which must be checked by a user upon completion of the task. If such an exit condition is not met, the associated task cannot be completed. This means you achieve a high degree of process control.

## Checking of field contents

Conditions can cover a wide range of complexity. The simplest variant is the checking of field contents in a table.

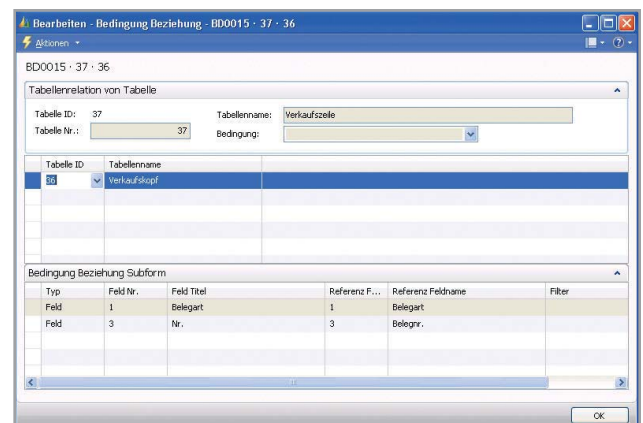


CHECKING OF FIELD CONTENTS

Field content changes above or below a threshold could be monitored by a condition and, if necessary, result in a workflow (e.g. credit limit change for a customer).

### Checking complex scenarios

In order to be able to map complex scenarios, the system allows you to set up as many complex table structures as required and to perform checks within



CHECKING COMPLEX SCENARIOS

these structures. The result of the check - i.e. true or false - can be used as an entry condition to trigger a process. An exit condition is checked in the event of an attempt to complete a task in the system.

### User-dependent conditions

Conditions can be checked user-dependently. This means it is possible to trigger processes according to the user who triggered a corresponding event.

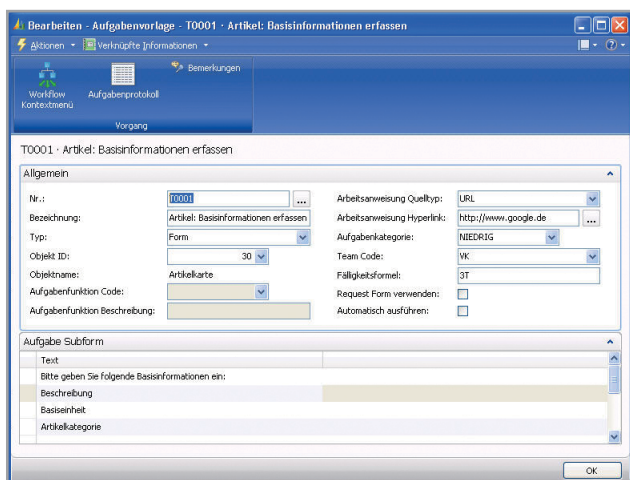
### TASK TEMPLATES FORM THE BUILDING BLOCKS OF YOUR PROCESSES

Task templates form the building blocks of processes. Workflows can be created from task templates and can be linked together with dependencies.

If a specific process is executed, task templates are converted into tasks and assigned to corresponding teams in your organisation.

### Work instructions

A task template describes the corresponding work so that the user can perform it properly. In addition, you can also save a work instruction as an additional document, which describes the task down to the finest detail.



TASK TEMPLATES

### Assignment of any desired objects for processing

All available screen masks in the system can be assigned for task processing. Thus, the screen mask used to process a product master record may differ from task to task.

It is also possible to assign a report for the processing of a task, in order to be able to make a specific decision, for example.

### Categorisation

Task templates can be assigned a category. This means you can structure upcoming tasks from the outset. The message inbox makes it easier to work through a greater number of tasks.

### Due date

A task template can be assigned a due date formula, which the system then uses to calculate a due date for a specific task.

### Process-related field-level security

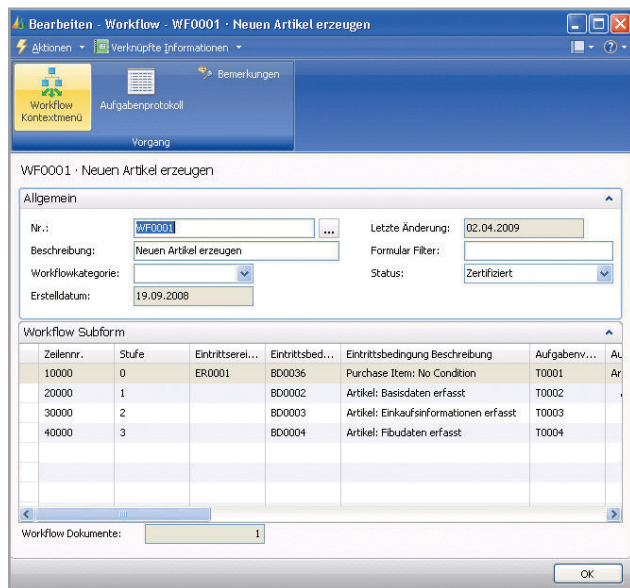
If you wish to guarantee that certain fields are only changed in the context of a process, you can link these fields to a task template. A user can then only change this type of field if he or she has first received a corresponding task.



**EFFICIENT CONTROL OF YOUR BUSINESS PROCESSES**

**Workflows**

Workflows are the central element of process management. They consist of task templates and conditions.



WORKFLOWS

If an event occurs in the system (e.g. insertion or changing of a data record), the system checks the conditions defined by you and, if necessary, triggers a workflow provided the entry condition for the process is met.

When a workflow is triggered, a chain of tasks is created, which may be dependent on one other. When a user completes a task, for example, this may cause another task to be triggered.

**Release management**

In the area of release management, it is possible to define conditions that require certain release levels. Via a release workflow and the associated release

hierarchy, even complex release requirements can be automated efficiently.

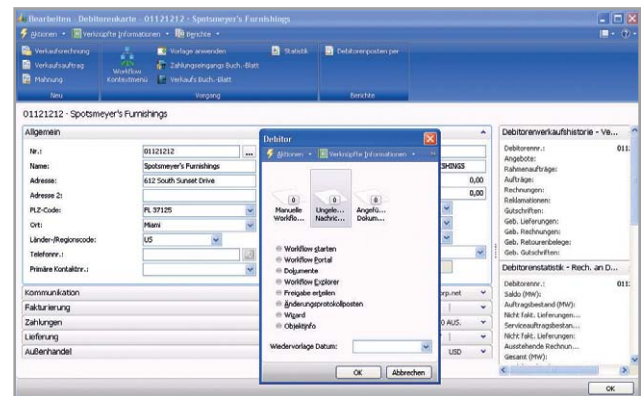
**Categorisation**

Workflows can be categorised in order to be able to use the resulting data at a later time for further process analysis, for example. Thus, you can create a report on the average lead times of an individual workflow category in order to derive information from it for further optimisation.

**FLEXIBILITY AND TRANSPARENCY WHEREVER YOU ARE**

**Workflow context menu**

The workflow context menu offers the user the possibility of using the workflow functionality from anywhere in the system. The form opens via a keyboard shortcut and the individual options can be selected.



WORKFLOW CONTEXT MENU

**Workflow explorer**

The workflow explorer allows you to view existing workflows for a specific data record. If, for example, you are at an order which is to be processed according to a specific procedure, you can gain an impression of the current processing status via the workflow explorer. You can check which tasks have



already been completed and can see which team is currently working on the process.

### **Ad-hoc workflows**

In addition to the workflows created automatically by the system, workflows can also be triggered manually. If a user does not have permission to change the address of a debtor but has found an error, he can start a corresponding workflow through which financial accounting receives a task to change the data record.

### **Forwarding**

A data record can be sent to a team or a user by means of an informal message. The recipient receives the message and can view the corresponding data record immediately, to answer a question from a different user, for example.

### **Document management**

You can use the workflow context menu to link each data record with any number of documents. During set-up, you can decide whether to save documents in the database itself or on a central file server.

### **Document network**

By defining links between different databases, documents that the system links with a data record at one place can automatically be displayed at other places. Redundant data management in relation to documents or duplicate linking of documents is thus a thing of the past.

## **KEEP SIGHT OF YOUR OBJECTIVE**

### **Workflow portal**

The workflow portal is your central tool for processing tasks that have been assigned to you by the system or by other users. Whenever you receive new tasks, you are sent a message.

### **Context-based task processing**

To process a task, a link in the workflow portal takes you directly to the corresponding context. This means you do not first have to search for a specific data record or open the corresponding form for processing. Simply click with the mouse and the system takes you directly to the relevant location.

### **E-mail integration**

You can also choose if you wish to receive tasks by e-mail. In this case, click on a hyperlink attached to the e-mail and the workflow portal opens automatically. You can then access the information immediately without any additional navigation.

### **Processing control**

The workflow system is based on teams, and one task may be sent to several users at the same time. To prevent duplicate processing, the system saves the time at which a specific user began processing a task. An information or error message (configurable) is then displayed to other users when they attempt further or new processing of the task.



**PROCESS DESIGN BY DRAG & DROP**

**Microsoft Visio integration**

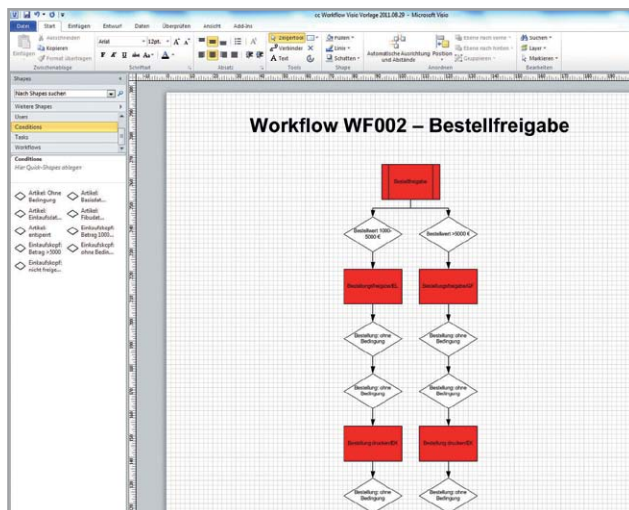
You can create the above-mentioned workflow elements in Microsoft Visio and link them together. Thus, you can create a workflow completely graphically and export it to Microsoft Dynamics NAV. Results of a process analysis in your company can therefore be implemented immediately in reality.

**Microsoft Visio templates**

Special templates are available to you for designing your processes. These templates contain Microsoft Visio shapes, which you can link together on a Microsoft Visio worksheet.

**HIGHLIGHTS**

- ▶ Process definition in Microsoft Dynamics NAV
- ▶ Process modelling with Microsoft Visio
- ▶ Workflow portal as central tool for monitoring and processing tasks
- ▶ Release management
- ▶ Workflow teams
- ▶ Field-level security for improved process control
- ▶ E-mail integration | document management
- ▶ Document management
- ▶ Ad-hoc workflows to trigger workflows spontaneously
- ▶ Periodic workflows
- ▶ Workflow Explorer for status monitoring of processes
- ▶ Workflow portal as central control tool



MICROSOFT VISIO PROCESS MODELLING, EXAMPLE ORDER RELEASE

**Bidirectional interface**

The core function of the Visio interface is the data flow from Microsoft Visio to Microsoft Dynamics NAV. However, you can also transfer existing workflows from Microsoft Dynamics NAV to Microsoft Visio. This means it is possible to graphically display and modify a workflow created in Microsoft Dynamics NAV in Visio.





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