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How True Workflow Management Links Project Management with Your Microsoft Dynamics Accounting System

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The term "workflow" is unfortunately used loosely in the market place. Do not be fooled. Most systems claiming to be "workflow based" or "workflow-driven" actually do not provide any workflows! They simply hard code a project-related business process to the way they think you should be automating it, make a few settings optional, and call it a workflow. A truly workflow-driven project management solution provides a graphical workflow engine at its core for all of the business processes it automates which allows you to draw your business process, similar to how you would design a chart in Visio. The difference is that as you draw the process, the workflow engine actually enforces and manages the business process and all of the business rules for you.

With a workflow-driven project management solution your data is audited, soft and hard validated, and approved based on best practices for whatever process you are controlling. All of the project management workflows that you need should be available out of the box; you should not have to build any to start; but you, as a business user, should be able to change them yourself at any time, create new ones, add new fields, set notifications, set role based assignments, set auditing etc all of this without IT's help or programming/technical knowledge.

As your organization matures, so will its processes. With a flexible platform for business process design and control , you can simply reconfigure your existing processes or draw your new process without programming.

So next time you see someone claiming to have a workflow-driven project management application, ask them what they really mean?

- Does the application provide a graphical workflow engine?
- If the answer is yes, is the workflow engine based on any industry standards?
- Can you create new workflows to automate other project management processes?
- Can you graphically modify existing pre-defined business processes?
- Does the system need programming, professional services, or IT' involvement to configure or modify a workflow? If the project management vendor you are considering says yes to all of the above questions except the last one (which should have a "no" answer), you've got yourself a workflow-driven solution!

Another important benefit of a true workflow-driven approach is the integration of the project management software with your accounting system. Employee time, expenses to be reimbursed, billable time and expenses, complete pre-bills or summary cost information may have to be exported from your project management application into your financial system. Here are some questions to consider for this type of integration:

- At what stage should project time and expense entries be approved?
- Should the entire process be delayed if only one project manager has not approved a timesheet or expense report?
- Who reviews and approves the data before they get sent over to the accounting system? What if there are corrections to be made?
- When should the time and expense entries be marked as "posted" in order to avoid double entry?

Workflows can be easily configured for pre-billing, payroll or expense report approval and export, tailored to the way you run such processes. For example, for one of our customers, we automated the entire pre-bill process. Project time and expenses are captured in the project management solution and exported to their Microsoft Dynamics accounting application. Because of the configurability of workflows and the customer's Dynamics accounting system, we were able to provide them with an end-to-end out-of-box time and billing solution that did not require any customized integration code. Once the pre-bill is prepared and approved in the project management application, it appears as a draft invoice in Dynamics for further review and processing.

Workflows visually model your business and adjust to the way you run your processes; making your project management and accounting systems become friends at last.

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