



Knowledge  
Management

## NAVISION AXAPTA®

### Business Process Management I Overview

- Actions and diverted actions
- Responses, dependencies and tracking
- Show Connections
- Multi- Distribution of Actions
- Planned Start and End
- Reference Types
- Automatic actions and action templates
- Outlook Integration

### Business Process Management II Overview

- Action Plans
- Reference Queries
- Query Distribution to Employees
- Show References and Employees
- Initiation and closure of an action
- Generate emails

### Business Process Mgmt. III Overview

- Strategic plans and current reality
- End Results
- SWOT Analysis
- Initiation and finalization of a plan
- Guides and templates
- Situation/Status Reports



## Business Process Management

### Presenting Navision Axapta

#### Business Process Management

The Business Process Management solution enables companies to establish strategies and goals and then control and monitor progress towards reaching stated objectives. The capabilities provided by this solution become evermore crucial as companies seek to leverage experience and human resources.

In addition to supporting action management, the Business Process Management solution provides an excellent tool that can be used by management to communicate key strategies and progress to employees. In this respect, the solution provides both high level and detailed views of progress with regard to fulfilling strategies and goals.

#### *Integrated functionality*

The Business Process Management (BPM) solution is divided into three modules:

**BPM I** – provides core action management functionality

**BPM II** – provides advanced action planning

**BPM III** – provides strategic planning

#### *Powerful business process management functionality*

The Business Process Management solution enables companies to make the best use of human resources.

Key benefits provided by the solution include:

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Knowledge Management

- Flexible action management
- Effective action planning
- Effective management of your company's strategy and vision

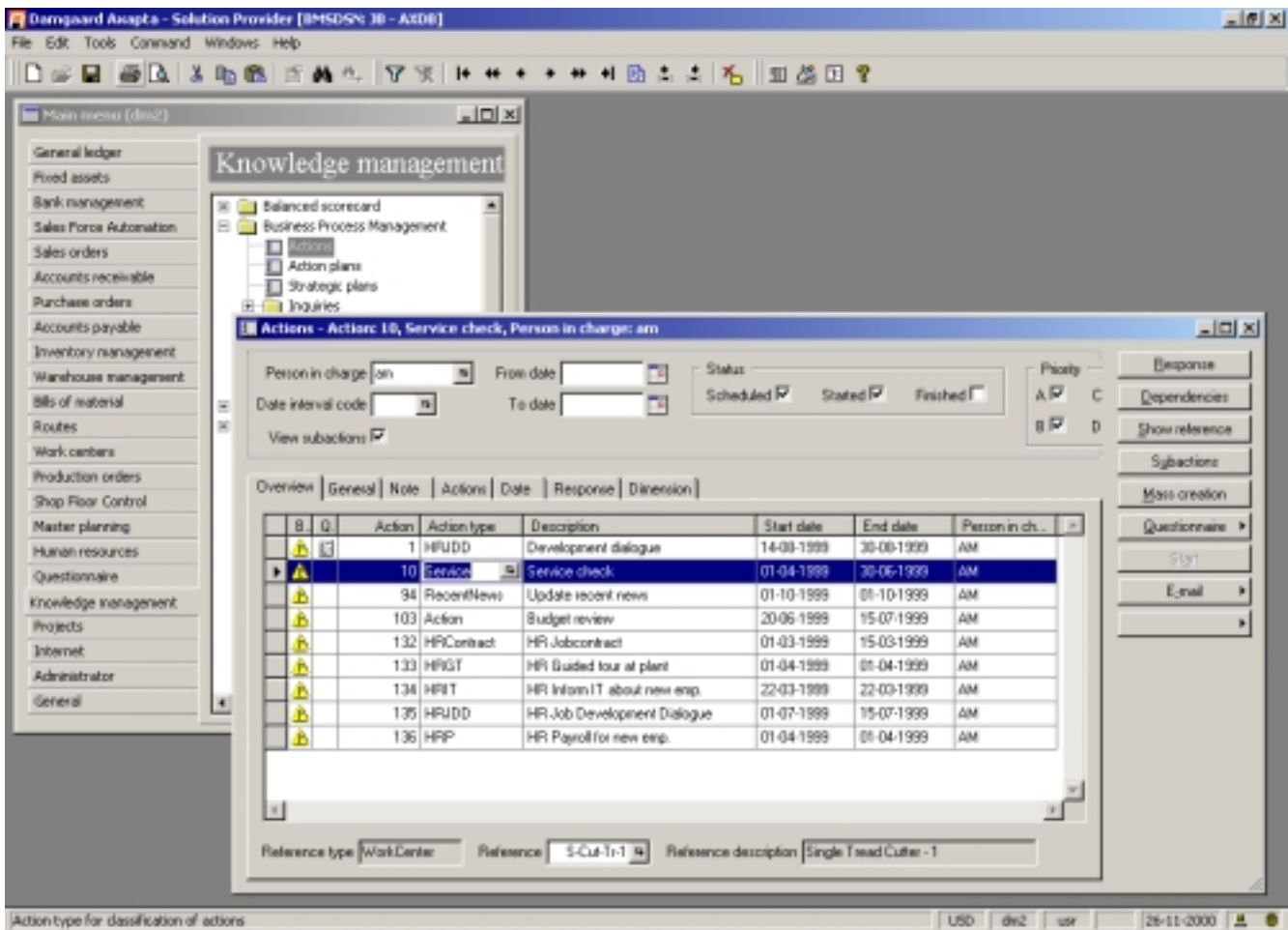
### Flexible Action Management

The Business Process Management solution enables any Navision Axapta user to establish and manage tasks. Tasks ensure the necessary structure and follow-up that is a natural part of planning.

### Actions

Each employee can work with their own actions using Business Process Management's structured and intuitive tools, where information about responsible persons, date intervals, priorities and status can be effectively chosen and sorted by need.

It is easy for the persons responsible to appropriate the necessary knowledge about every occurrence that is connected to any action.



Action-oriented information that is managed using the Business Process Management solution ensures that tasks are undertaken by the appropriate people at the right time.

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### **Action template**

Process design can be implemented by using action templates. This way, a simple process can be supported optimally as best practice. An Action template includes a free choice of the number of actions that can be created simultaneously with distribution to the responsible people from within the definition.

For example, this can be a checklist in connection with a recruitment process, or an instruction procedure with the start-up of new employees.

### **Response and tracking**

It is easy with Navision Axapta Knowledge Management to respond to actions, create diverted actions, and require actions between employees. You can set up the system so that a given response automatically suggests a new action. This ensures consistency and gives you the ability to control procedures.

Every action and response has an identification that ensures a structured and measurable follow-up, along with tracking of dependencies.

### **Outlook integration**

Actions can be sent as email or created as tasks in Microsoft Outlook. This can occur simultaneously with sending actions from an action plan or individually from a single action. Emails can be sent to those responsible for actions, contact persons regarding actions, or both. The field content in Navision Axapta that is used as email or tasks is indicated in the set up for individual action types.

## **Effective Action Planning**

Action planning supports your company's focus on adopted goals. You decide what data in Navision Axapta is to be used to create the foundation for an action-oriented effort. Action plans support specific tasks like:

- Campaigns
- Customer satisfaction surveys
- Employee performance reviews
- Recruitment tasks
- Administration of other resources, for example, machinery

You control the delegation of actions to responsible employees with easy and flexible planning, where the employee's qualifications, organizational or physical location, or other characteristics can be a determination of your choice.

## **Effective management of your company's strategy and vision**

The strategic planning module supports the principles behind "The Learning Organization", a universal and user-friendly method that puts everyone in a position to understand the importance of planning for the future.

### **Strategic Planning**

You can use a strategic plan to identify, control and monitor the progress of your company's overall strategy or an employee's development plan.

A plan is set up as a main plan or a sub-plan with accompanying references. It is updated with start and

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end dates, responsible employees, organizational units and a classification of which type plan it is. From the initiation of a plan until the end result is achieved, responsibilities must be delegated and tasks fulfilled - all of which can be controlled and monitored by the action management module.

With the strategic planning module you can ensure that the strategic processes become a natural part of all employees' daily work. This ensures your company's optimal usage of resources and a shared understanding of the organization's focus and goals.

### **Current Reality/End Result**

When the work with a strategic plan begins, its vision must be described so others can understand the end results desired. It is an important leadership discipline and a major determination for your company's success. Often, an analysis of the current situation is carried out. This allows you to describe the current reality and supplement it with a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats).

### **Recent News**

The periodic description of the status of a plan is the information driver - and the responsible planner's reporting tool - for verification of progress. It provides a good way to revise or add information to a starting point or to an end result.

### **Guide**

For instructions in "best practices", the user is helped step-by-step through the creation of a strategic plan

with all the features that normally make up such a plan. The guide is a good way for users to start learning and understanding strategic planning.

### **Templates**

When setting up a new plan, you can use a template, which identifies the entire structure of a plan, desired control points, and actions. The goal is to have a standard and effective starting point for the creation of new plans with similar structures. These can be, for example:

- A project based on a quality control model
- Building up a strategic plan, support of an organizational model or other documented and approved standard for process completion
- Production flow
- Personal goal-setting as a tool for discussions and reviews

### **Integration**

Strategic planning is integrated with the Organization module in Human Resource and Balanced Scorecard.

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