

Workflow Setup

Workflow is required to drive assignments inside the organization tree, you can follow the below steps

Create a New Workflow

1. Go to **Organization & Workflow**.
2. Choose **Workflow Setup** tab.
3. Double click on the current workflow, and click **Duplicate** button.
4. A copy of the current workflow will be created.
5. Edit it → Click on **Apply changes** to save.
 - To activate or inactivate a workflow, select the workflow first, then got o **Status** to tick or un-tick **Active** box.
 - Choose **Time from & Time to** to set time for current workflow.

Once you created the new workflow, you will see the following feature in 5 tabs

1. Workflow
2. Levels
3. Transition
4. Data Access
5. Inline Analytics

Organization & Workflow

Organization Tree **Workflow Setup** Assignments Subscriptions

Process: Financials Show Inactive

Workflow	Process	Active
Budget 2021	Financials	<input checked="" type="checkbox"/>
Sales Budget 2021	Sales	<input checked="" type="checkbox"/>
Budget 2022	Financials	<input checked="" type="checkbox"/>

Workflow Levels Transitions Data Access Inline Analytics

Workflow Name	Budget 2022
Process	Financials
Status	<input checked="" type="checkbox"/> Active
Scenario	Budget
Scenario Type	Budget
Time from	01/2022
Time to	12/2022
Default Compare	Actual
Initial Workflow State	Input/Adjust Budget
Refresh Actuals State	Committed
Modeling Status	Draft
Modeling Comment	

1. Workflow

Workflow Levels Transitions Data Access Inline Analytics

Workflow Name	Budget 2022
Process	Financials ▼
Status	<input checked="" type="checkbox"/> Active
Scenario	Budget ▼
Scenario Type	Budget
Time from	01/2022 
Time to	12/2022 
Default Compare	Actual ▼
Initial Workflow State	Input/Adjust Budget ▼
Refresh Actuals State	Committed ▼
Modeling Status	Draft ▼
Modeling Comment	



Delete Reset Duplicate Apply changes

You will have the filled form as above by default, you can change its properties if needed

A few of the features will be explained in detail here

Default Compare: You can select which would be displayed as comparative in your workflow assignment (i.e Actuals show as comparative in your budget sheets) **Initial Workflow status:** All the data in the system is related to the workflow state, so you can choose which workflow to set to start with

Once you selected everything, you can hit on the reset button, reset button will set all the workflow data as you choose in the interface

2. Levels

Workflow Levels Transitions Data Access Inline Analytics

Organization Hierarchy ▼

Workflow Levels

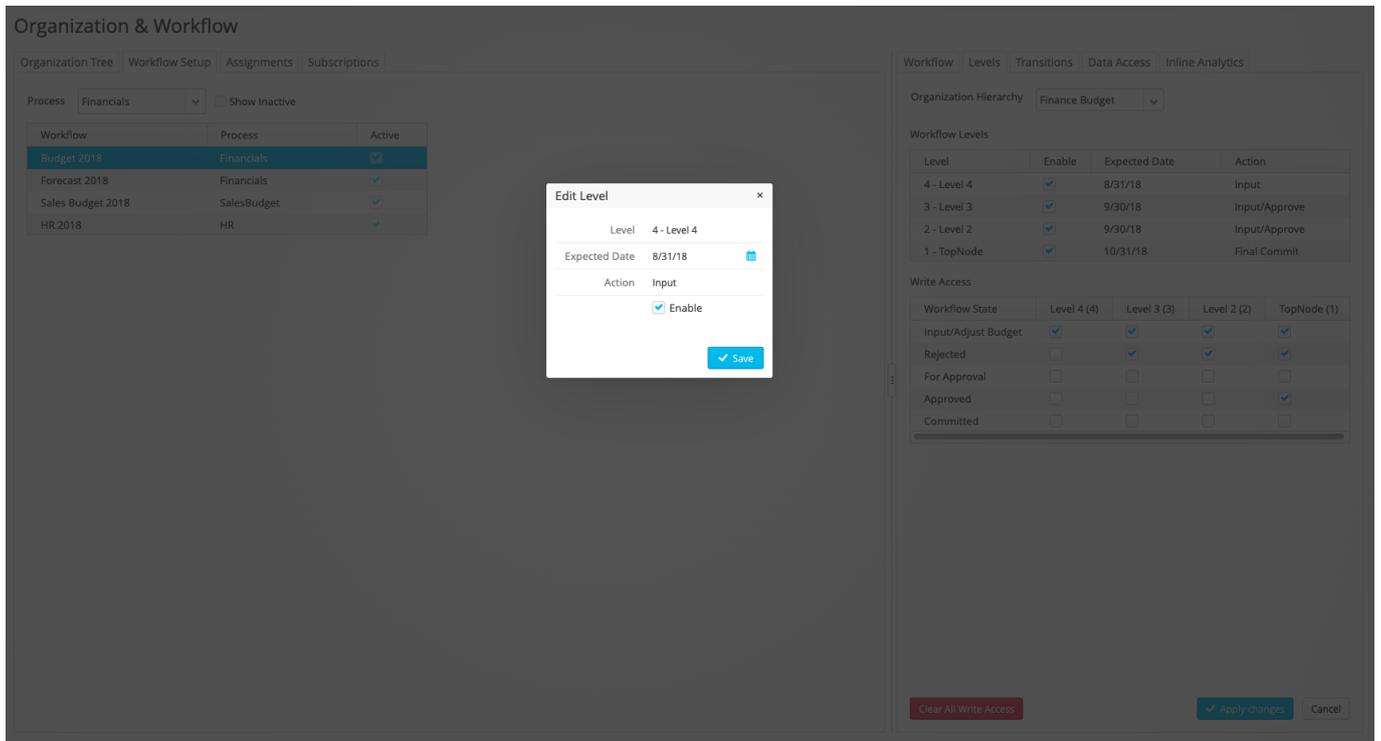
Level	Enable	Expected Date	Action
4 - null	<input checked="" type="checkbox"/>	8/31/18	Input
3 - null	<input checked="" type="checkbox"/>	9/30/18	Input/Approve
2 - null	<input checked="" type="checkbox"/>	9/30/18	Input/Approve
1 - Level 1	<input checked="" type="checkbox"/>	10/31/18	Final Commit

Write Access

Workflow State	null (4)	null (3)	null (2)	Level 1 (1)
Input/Adjust Budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For Approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Committed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Levels represent the organization hierarchy (i.e CEO is in level 1 and CFO in level 2 etc), here you can define which level has what actions

If you double click any level there, you will see the below screen



Here you can set the timeline, and also rename the action, enable/disable the workflow Level

In this example, level 4 can Input data until 8/31/18, and also it is enabled right now

Another feature under the level is the write access, see below

Write Access

Workflow State	Level 4 (4)	Level 3 (3)	Level 2 (2)	TopNode (1)
Input/Adjust Budget	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rejected	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
For Approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Committed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This shows the authorization matrix, level vs workflow state

as per this example, all levels (Level 1,2,3,4) can input/Adjust the budget, but only Level 1 can approve the budget

3. Transitions

You can define or give access to level to move one workflow state from one state to another state

Workflow Levels Transitions Data Access Inline Analytics

Organization Hierarchy Finance Budget

From Workflow state Input/Adjust Budget

To Workflow State	TopNode (1)	Level 2 (2)	Level 3 (3)	Level 4 (4)
Rejected	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Committed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Here you can select

Organization Hierarchy - Select the required hierarchy (Only applicable if there is more than one)

Select **From Workflow status** - You can select from workflow status here, in this example, we have selected Input/Adjust Budget (Meaning, who can move Input/Adjust workflow status to something else)

Select or check **To Workflow state** - You can tick the check box in front of To workflow status under the relevant level columns, as per the above picture, only the level one can move Input/Adjust Budget to Rejected status, and only Level 1 and 2 can move from Input/Adjust to Approved status

4. Data Access

Here you can define the default dimension setting for the workflow, once you set this, it will appear in all input sheets, you can also check the lock checkbox, then it can not be changed by any other user inside the input sheet. User can only send data to the hardcoded dimension in workflow

Workflow Levels Transitions **Data Access** Inline Analytics

Data Access for this Workflow +

Dimension	Member	Locked
BusinessProcess	INPUT	<input checked="" type="checkbox"/>
BusinessRule	NONE	<input checked="" type="checkbox"/>
Currency	USD	<input type="checkbox"/>
Scenario	BUDGET	<input checked="" type="checkbox"/>
TimeDataView	RAWDATA	<input checked="" type="checkbox"/>
Version	NONE	<input checked="" type="checkbox"/>

Clear All Connections ✓ Apply changes Cancel

5. Inline Analytics Setup

Inline analytics - setup other scenarios to compare with current workflow (input sheets).

In below example, BudgetPY(previous year) and ActualPY(previous year) are created to compare with this workflow budget 2018.

- To add a new scenario, click on the plus icon next to **Series**, by default it will be Actual. Then you change a title for it and select the right scenario.
- Select the scenario → click on the remove button to delete the selected scenario.
- **Use as spread key** - you can use the scenario's value as your input value for this workflow budget 2018.
- **Override slicers** - you can hard code for this scenario to make sure it gets the correct data.
For example:
 - for BudgetPY could be BusinessProcess=Input;
 - for ActualPY could be BusinessProcess=Consolidated.

Workflow | Levels | Transitions | Data Access | **Inline Analytics**

Series +

Budget PY	Title	Budget PY
Budget	Scenario	BUDGET
Actual PY	Chart Type	
	Time Shift	Previous Year
	<input checked="" type="checkbox"/> Visible	
	<input type="checkbox"/> Use as spread key	
	Override slicers +	
	Dimension	Member

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