

CEWS AUGUST 30 2017

WORKFLOW

Q&A

1. I would like to know about multi-step approval or entry processes, where different people enter different values in a template in sequence, then one person approves it all.

Currently a specific sequence can only be set at the activity level by selecting the "contingent on activities" start condition option. For example if desired sequence is individual A enters their budget, then individual B enters their budget (after individual A has completed theirs), once B complete their budget individual C approves, each person's task must exist in a different activity with B contingent on A completing and C contingent on B completing. There is a feature request in the Profix Feedback Forum. You can view and vote on this feature [here](#).

In the Webinar, we mentioned how approvers can only see what the task owner has access to. If tasks are set without approvers then the budget numbers will flow into the template for which the user has access. The final task will be having an approval only task that is contingent on the sequence of data entry tasks. This task can be specified to have multiple approvals. This means that the approvers tagged to the task all need to agree on the task before the workflow may proceed.

2. How can we delete an old workflow? We deleted all of the task and activity but can not delete the actual workflow.

You can delete an old workflow by setting it from active to prepare mode. No further emails will be sent out in the pre-existing workflow. The following step would be to then delete the Workflow from Document Explorer. Consequentially, the tasks belonging to the Workflow will be removed from user's dashboards.

3. Can we use prior years workflow templates for this year budget?

You are able to use prior year workflows by readjusting the dates. When you adjust the date at the project level, the dates in the activity and task level will adjust to reference the recently changed project date if you select "YES". If you indicate "NO" then the dates will not adjust to reference the project date.

4. Does a task need to be set up under an activity or can it be created directly under the project level?

A task can only be set up under an activity.

5. We do have some users who do not complete/submit/or approve their workflow tasks. Is there a way for the administrator to mark a workflow project complete (resulting in workflow tasks being removed from the user)?

Yes. At every level, you can customize the Notifications/Actions to automatically submit or complete a task once it's been overdue for a set number of days. Workflow Project owners can also manually set a task to complete.

6. We use the web client - how is the DPM task different in the web client?
DPM tasks function the same in the web client. Users can enter data in assigned tasks/schedules. Please see the About Workflow Tasks help topic [here](#). For info on what can be done in schedules in the web client please see About schedules topic [here](#). The web client version of Detailed Planning Manager and Workflow Manager will be available by Dec 2018.
7. What level of user can enter data in Workflow?
Standard users and above can enter data in online to Prophix. Reporting and Basic users can enter data using offline templates.
Within workflow, Data entry tasks should be used for Online data entry within Prophix and Offline Data Entry tasks can be used for Offline Data entry
8. How do you remove a task from the dashboard without an approval?
The Administrator of the Workflow Project will need to delete the task from the Workflow Project and then save the Workflow to remove the task from the dashboard without an approval.
9. When the approver goes into the budget to approve, can they easily see what changes were made?
We don't have functionality which automatically highlights changes, however you can place cell comments where the changes were made and the justification for the changes. Users need to be aware to use cell comments
10. Can you setup a workflow to be recurring on a monthly basis? We collect standard hours from the plant finance managers monthly for close.
No, workflow cannot be scheduled to recur. You would need to reset the project start date manually each month, all subsequent activity and tasks dates will shift accordingly. There is a feature request in the Prophix Feedback Forum. You can view and vote on this feature [here](#).
11. How do you know if someone has the proper access to the data prior to assigning the task?
All the access to data is controlled by using security manager. The read and write access to the relevant cubes should be applied the same way to workflow tasks
12. When someone makes a change to their budget will the approver see what the exact change was?
We don't have functionality which automatically highlights changes, however you can place cell comments where the changes were made and also the justification for the changes. Users need to be aware to use cell comments if the approver wants to know exactly what data has changed in the task.

13. Is there any way to force a task complete (say a task got completed outside the workflow and the assigned user is not available to complete the task within Prophix)
Through the use of customized notifications, enable the “Automatically submit the task when overdue for...”. Be sure to specify the days. This should force a task complete.
14. When saving the workflow into a folder...does that folder need to be a public folder or at least a folder that the user has read/write access to?
Read/Write access only applies to the data found in the workflow. Only Advanced Users and Admin Users have access to workflow manager. Standard users can only view workflow tasks if they are assigned the task.
15. Is there a limit to the number of times a task can be submitted after rejection?
There is no limit to the number of times a task can be resubmitted, as long as the task is available – each time a task is resubmitted, it must be rejected in order to make further changes
16. What is the Prophix version for this demonstration?
The Prophix version for this demonstration was Prophix Version 12 Update 5.
17. When I print the work flow plan I would like it in date order. How can I do that?
Currently, the feature to export and extract the workflow plan is not available in Prophix. This is good question that will be escalated to the product development team. Thanks for your insight.