



# Workflow



## Quick Start Guide

New to OneStop Reporting or upgrading from a previous version? Use this guide to learn the basics in Workflow.

**Status:** View the status and progress of a published or finished workflow.

**View:** View the details of a published workflow

**Edit:** Edit a draft workflow. For an already published workflow, you can only edit the time interval.

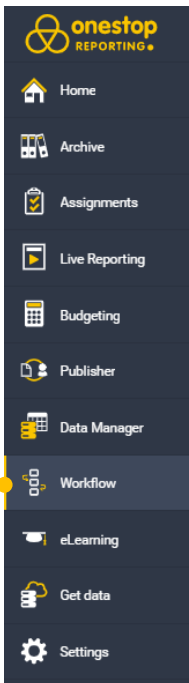
**Duplicate:** Duplicate an existing workflow. All budget templates, users and parameters are copied over.

**Delete:** Delete the selected workflow. All assignments will also be removed.

**New:** Create a new workflow.

**Save:** Save the workflow without publishing.

**Publish:** Send assignments to the selected users.



Workflow

STATUS VIEW EDIT DUPLICATE DELETE NEW

### Workflows

NAME	STATUS	ASSIGNMENTS	CREATED	CREATED BY
Budget 2019	Completed	1		
Budget 2020	Published	9		
Budget 2021	Published	8		

**Name:** Enter a name for the budget workflow. The end users will see this as the name of their assignment.

**From-To:** Set a start and end date (deadline) for the workflow, and click **Apply**. The assignments will not be available to the user(s) until the specified start date.

Select the relevant **parameters**. OR select **Let the user decide** to let the users select on which parts of the budget template to work. The available parameters vary according to the selected templates.

**Select users:** Select the users to whom you want to assign the budget template. You can also select all users from a role.

**Reviewer:** (optional) Select a reviewer for the budgets.

**Approver:** (optional) Select an approver for the budgets.

Select budget **templates** and **companies** to be included in the workflow.

**Copy to companies:** If the same parameters and users should be used across multiple companies, you can copy these settings to other companies.

**Edit workflow details:** Use the pencil to customize the parameters for individual users or budget templates. In addition, you can edit the start and end dates.

Properties

NAME: Budget 2020

REVIEWER (OPTIONAL): Anna

APPROVER (OPTIONAL): Roland

Workflow setup

SELECT TEMPLATES: DinerMania, AirlineTravel

SELECT COMPANIES

DEFAULT PARAMETERS

CHOOSE ACCOUNTS: 090.970

FIRST PERIOD IN BUDGET YEAR: 202001

CHOOSE BUDGET SCENARIO: 2020

Let the user decide

USER ASSIGNMENTS

SELECT USERS

Lizzie Clare [edit] [checkbox]

Scarlett [edit] [checkbox]

Tom [edit] [checkbox]

Access the **Workflow** module.

**Edit workflow details:** Use the pencil to customize the parameters for individual users or budget templates. In addition, you can edit the start and end dates.