Workflow in the Sales Model

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The workflow implementation in the model helps the users in the collection of planning data. The workflow restricts the write access to reports in a timely manner. Users can only enter and modify planning data within workflow activities. Outside of these activities, the modification is inhibited. This enables a workflow administrator to gain control of modifications and ensures data integrity.

The workflow feature is implemented in multiple models. The major workflow principles apply to all models.

Each data package to be collected under workflow control is represented by a workflow task displayed in the Workflow Administration report. The data package is defined by the model, the version and the time frame which is a single year in most cases. The tasks for the Sales model would be as follows:

- Sales Mid-Term Planning 2017 – 2019
- Sales Budget 2017
- Sales 3+9 2016

Note: The tasks must be created in advance when the workflow is used to collect data packages for specific versions or years.

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Within the workflow task, administrators can schedule when particular workflow activities should be completed with the Workflow Task report. They can determine which user groups are assigned to execute said activity within the Workflow Assignment report. Once an activity becomes active, e-mail notifications are sent to the users in groups assigned to the activity. E-mail notifications are editable within the E-mail Notification report.

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