BusinessObjects Planning Workflow Guide
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# Contents

<table>
<thead>
<tr>
<th>Chapter 1</th>
<th>Introduction</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>Conventions used in this guide</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>About BusinessObjects Planning</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>Related documentation</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>About this guide</td>
<td>12</td>
</tr>
<tr>
<td>Chapter 2</td>
<td>Understanding Workflow</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Overview</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>About Workflow</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>The Workflow process</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>Workflow roles</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>Submitters</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Approvers</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Workflow administrators</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Other BusinessObjects Planning users</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Parent and child relationships in Workflow</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>Workflow actions and statuses</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>Workflow in BusinessObjects Planning</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>BusinessObjects Planning Administrator and BusinessObjects Planning Analyst</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>BusinessObjects Planning Workflow Console</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>BusinessObjects Planning Analyst</td>
<td>24</td>
</tr>
<tr>
<td></td>
<td>Using the BusinessObjects Planning Workflow Console</td>
<td>24</td>
</tr>
<tr>
<td></td>
<td>Starting the Workflow Console</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Workflow toolbar</td>
<td>27</td>
</tr>
<tr>
<td></td>
<td>Opening a Workflow plan</td>
<td>28</td>
</tr>
<tr>
<td></td>
<td>The Console layout</td>
<td>28</td>
</tr>
</tbody>
</table>
Tree hierarchy ......................................................... 29
Accessing the Status page ....................................... 29
Accessing the Calendar page .................................... 30
Accessing the Unit Properties page .............................. 31
Resizing columns ................................................... 32
Printing information displayed in the Console ................. 33
Launching a report .................................................. 34
Searching for information ....................................... 34
Going to a specific row ............................................ 35
Using the Application Log window ............................. 35
Viewing version information ..................................... 36

Chapter 3 Administering Workflow 37
Overview ............................................................ 38
The Workflow Administrators group ............................. 38
Understanding Workflow rights .................................. 39
Submit and Approve rights ...................................... 39
Scenario and unit rights ......................................... 40
Implicit and explicit Workflow rights ........................... 41
Loading Workflow rules ......................................... 42
Configuring e-mail notification ................................. 43
Listing e-mail addresses ......................................... 43
Customizing e-mail notification ............................... 44
Setting the content of e-mail notifications ..................... 46
Setting up a Workflow plan .................................... 47
Setting Workflow properties .................................... 48
Replicating a master Workflow scenario down the unit hierarchy ........................................ 50
Changing Workflow properties at the unit level ............ 52
Setting Workflow rights ......................................... 52
Setting Workflow dates ......................................... 54
Changing Workflow status ...................................... 55
Replicating Workflow properties .............................. 57
Replicating Workflow dates .................................... 58
Contents

Replicating Workflow status ........................................... 60
Disabling Workflow ....................................................... 63
Disabling Workflow in a scenario .................................... 63
Disabling Workflow in a unit hierarchy ......................... 64

Chapter 4 Maintaining Workflow Scenarios 65
Overview ................................................................. 66
Submitting a scenario for approval .............................. 66
Submitting in BusinessObjects Planning Administrator and
BusinessObjects Planning Analyst Pro ...................... 67
Submitting in Analyst ..................................................... 68
Submitting in the Workflow Console ......................... 69
Approving a scenario .................................................. 71
Approving in BusinessObjects Planning Administrator and
BusinessObjects Planning Analyst Pro ...................... 71
Approving in Analyst ..................................................... 73
Approving in the Workflow Console ......................... 74
Rejecting a scenario ................................................... 76
Rejecting in BusinessObjects Planning Administrator and
BusinessObjects Planning Analyst Pro ...................... 76
Rejecting in Analyst ..................................................... 78
Rejecting in the Workflow Console ......................... 79
Changing the Submit by date ......................................... 80
Viewing and printing Workflow history ..................... 83
Sending a report link by e-mail ..................................... 84

Chapter 5 Setting Up Workflow Scripts and INI Parameters 87
Overview ................................................................. 88
Workflow script descriptions ...................................... 88
Importing Workflow libraries and scripts .................... 89
Attaching Workflow libraries to scripts ...................... 90
Restricting rights to the Workflow e-mail script ........ 91
Registering script servers .......................................... 91
Scheduling Workflow scripts for execution .................. 92
Introduction
Overview

This guide contains information about setting up and using the Workflow functionality found in BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, BusinessObjects Planning Analyst, and Workflow Console. This guide assumes that you already know how to use the Microsoft Windows operating system.

Conventions used in this guide

The following table describes the conventions used in this guide.

<table>
<thead>
<tr>
<th>When you see…</th>
<th>It indicates…</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold text</strong></td>
<td>A name of a user interface item that you should select. For example, “Right-click a report and select <strong>Properties</strong>.”</td>
</tr>
<tr>
<td><strong>Courier text</strong></td>
<td>Information you need to type into a data entry field. For example, when you see “Type <strong>AuthorizationServers</strong>”, you should type each individual letter key to make up the word <strong>AuthorizationServers</strong>.</td>
</tr>
<tr>
<td><strong>BOLD SMALL CAPS</strong></td>
<td>Specific keys you need to press. For example, when you see “Press <strong>ENTER</strong>”, you should press the <strong>ENTER</strong> key on your keyboard.</td>
</tr>
</tbody>
</table>

About BusinessObjects Planning

The BusinessObjects Planning product suite provides Web-enabled, vertical industry-targeted enterprise analytics software that helps companies measure, analyze, and predict business performance and profitability. Organizations leverage the suite for real-time business planning and forecasting, accelerating mergers and acquisitions, understanding business performance by customer segment, product, channel and business line, and delivering performance management information across the enterprise.

BusinessObjects Planning is the only suite that is selectively packaged into a series of applications, each one tailored to support a different segment of the user community. Moreover, every user leverages a common information infrastructure. All user applications are driven by the same set of data, business rules, user rights, and report templates, and any changes are automatically synchronized across the enterprise.

The product suite includes the following applications:
BusinessObjects Planning Administrator

BusinessObjects Planning Administrator allows nontechnical users to rapidly and easily configure, deploy, and administer BusinessObjects Planning applications across multiple sites. From a central site—and leveraging intuitive graphical interface, drag-and-drop function, and advanced automation capabilities—users can install and synchronize geographically dispersed sites, assign user access rights, and build and manage multiple business models.

BusinessObjects Planning Analyst Pro

BusinessObjects Planning Analyst Pro is designed for nontechnical users who have sophisticated information requirements. A comprehensive range of formatting features, and drag-and-drop functions allow users to easily create and maintain reports. In addition, users can quickly build, manage, and execute scripts that automate complex tasks such as scheduled report production and distribution.

BusinessObjects Planning Analyst

BusinessObjects Planning Analyst provides secure remote access to real-time report information anywhere, anytime, through a Web browser. Intelligent graphic indicators, drill-down toolbars, built-in annotation capabilities, forecasting tools, and a sophisticated charting interface allow users to easily view, enter, and edit report data.

BusinessObjects Planning Excel Analyst

The BusinessObjects Planning Excel Analyst allows users to leverage advanced analytics, superior performance, and automated information synchronization and distribution capabilities, all from within a familiar Microsoft® Excel environment.

Related documentation

For information about installing and using BusinessObjects Planning, please refer to the following documentation:

Installing BusinessObjects Planning Sites

This guide describes how to install a BusinessObjects Planning site that uses either a Microsoft SQL Server or Oracle® database.
Installing BusinessObjects Planning Server Components
This guide describes how to install the BusinessObjects Planning Server components to allow Internet-based use of BusinessObjects Planning. It provides installation and configuration instructions for the BusinessObjects Planning Analyst site, the BusinessObjects Planning Gateway, BusinessObjects Planning Server, and BusinessObjects Planning Scheduler.

Installing BusinessObjects Planning Workstation Applications
This guide describes how to install and configure BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, and BusinessObjects Planning Excel Analyst on user workstations.

BusinessObjects Planning Server Components Administration Guide
This guide, designed for administrators, describes how to configure and manage BusinessObjects Planning Servers and BusinessObjects Planning Gateways. It provides information about using the BusinessObjects Planning Site Monitor tool to manage the BusinessObjects Planning enterprise, the Planning.ini configuration file, load balancing, and other configurable properties.

Customizing BusinessObjects Planning Installations
This guide describes how to modify configurable properties in BusinessObjects Planning configuration files or executables to create customized installations.

Using the BusinessObjects Planning Configuration Assistant
This guide describes how to use the BusinessObjects Planning Configuration Assistant to configure client applications, create or modify connections to BusinessObjects Planning sites, or create configuration reports to aid in troubleshooting.

Administrator’s Guide
This guide describes how to configure, customize, and maintain BusinessObjects Planning applications on behalf of other users. This guide includes conceptual and background information on the features and functions of the applications. It also gives examples of how to use BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro.

BusinessObjects Planning Reporting Guide
This guide describes how to create, use, and format reports using BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro. This guide explains reporting-related concepts and provides step-by-step instructions.
BusinessObjects Planning Analyst User Guide
This guide describes how to use BusinessObjects Planning Analyst to access, view, and analyze BusinessObjects Planning reports in a World Wide Web environment.

BusinessObjects Planning Excel Analyst User Guide
This guide serves two purposes. It describes how to use the BusinessObjects Planning Excel Analyst to access, view, and analyze BusinessObjects Planning reports in an Excel environment. It also describes how to use the BusinessObjects Planning Excel Analyst to create ad hoc reports that query business rules and data in your BusinessObjects Planning environment. This guide explains reporting-related concepts and provides step-by-step instructions.

BusinessObjects Planning Workflow Guide
This guide is intended for BusinessObjects Planning users who deal with their organization's Workflow plans and who are responsible for administering, submitting, and approving Workflow scenarios. It contains conceptual and background information on the elements of Workflow in BusinessObjects Planning and gives examples of how to apply Workflow to an organization's planning and forecasting process. As Workflow functions are not specific to one application in BusinessObjects Planning, this guide includes Workflow-related information for BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, BusinessObjects Planning Analyst, and Workflow Console.

Configuring Security
This guide, designed for administrators, describes how to configure and manage authentication and security for a BusinessObjects Planning site.

Online help
The online help provides step-by-step instructions for using BusinessObjects Planning applications. The online help also provides reference and conceptual information. To access online help in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro, select Help from the Help menu on the Organizer toolbar, or press F1. To access online help in BusinessObjects Planning Analyst, BusinessObjects Planning Excel Analyst, or Workflow Console, click the Help button on the application toolbar.
About this guide

This guide is intended for BusinessObjects Planning users who are responsible for administering, submitting, and approving Workflow data in their organization. It includes conceptual and background information on the elements of Workflow and gives examples of how to use this feature and how to apply it to the work you do. As a Workflow user, you may use BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, BusinessObjects Planning Analyst, or Workflow Console, or a combination of the four, to perform your tasks, depending on the role and responsibilities you have in the Workflow process.

Because this guide is organized by the role of the user, the order of chapters is not indicative of the order in which you will perform the tasks. Depending on your role, some information in this guide may not apply to you.

"Understanding Workflow" is intended for all BusinessObjects Planning users who are involved in their organization’s Workflow process, regardless of their role. "Administering Workflow" is intended for Workflow administrators, while "Maintaining Workflow Scenarios" is intended for users who are responsible for submitting and approving Workflow data. "Setting Up Workflow Scripts and INI Parameters" is intended for users who manage scripts in BusinessObjects Planning.

The chapters in this guide include:

**Understanding Workflow**
Provides a high-level overview of concepts you should be familiar with before using Workflow in BusinessObjects Planning. It also provides information on how to use and navigate through the Workflow Console and describes its three main components: the Status page, the Unit Properties page, and the Calendar page.

**Administering Workflow**
Provides Workflow administrators with the information needed to effectively manage Workflow scenarios and units so that users can efficiently submit and approve Workflow data. Topics such as rights, Workflow properties, and e-mail notification are discussed.

**Maintaining Workflow Scenarios**
Describes how to submit, reject, and approve Workflow scenarios in the various platforms of BusinessObjects Planning. This chapter provides step-by-step instructions for each method and describes features that are useful for submitters and approvers.
Setting Up Workflow Scripts and INI Parameters

Describes how to import and run scripts that automate Workflow jobs. This chapter also provides step-by-step instructions on how to manage scripts by setting rights and INI parameters.
Understanding Workflow
Overview

This section explains the concepts you should understand before using Workflow in BusinessObjects Planning. After reading this section, you should have a good understanding of why organizations use Workflow and of the roles, actions, and stages in the Workflow process.

About Workflow

In BusinessObjects Planning, an organization’s plan and forecast data is collected into scenarios. Workflow manages the way this data is submitted and approved by tracking changes to scenarios throughout the reporting, planning, and forecasting life cycle, providing greater regulation, restriction, and change management for the data that scenarios contain. This means that your organization can use Workflow scenarios for generating plans, such as budgets and forecasts, which can be tracked for changes and for any potential problems that may occur during the Workflow process.

Because this process incorporates tracking of audit information through history and comments, enforcement of deadlines through changes in scenario status, and user accountability through assigned roles, Workflow can reduce an organization’s plan cycle time.

The Workflow process

To use Workflow in BusinessObjects Planning, a Workflow administrator must first enable Workflow functionality in a scenario. Once scenarios have been Workflow enabled, BusinessObjects Planning users can submit and approve the scenarios based on due dates and Workflow rights, which Workflow administrators set. In the Workflow process, the submitter enters or edits data in the scenario and submits it to the approver, who has the option of accepting or rejecting the changes. Whether a BusinessObjects Planning user is a submitter or approver is determined by their access rights to the scenario and to the unit associated with that scenario.

While multiple users can be submitters and approvers for a particular scenario, each scenario in a Workflow plan is associated with one or more explicit submitters and one or more explicit approvers. These explicit submitters and approvers are the users who receive Workflow notification e-mails.

The following diagram illustrates the Workflow process.
When Workflow administrators create a Workflow scenario, they set the following due dates for the scenario:

- Open date - The date on which editing can begin
- Submit by date - The date that editing is to be completed by and the scenario is to be submitted for approval
- Approve by date - The date by which the scenario is to be approved

Submitters can enter and edit data during the time period between the Open date and the Submit by date. Approval takes place during the time period between the Submit by date and the Approve by date.

BusinessObjects Planning oversees the entire Workflow life cycle by tracking status changes to the scenario and recording them in the Workflow history. It also automates many Workflow tasks such as e-mail notification of status changes and the granting of user rights to edit scenarios based on their status.

**Workflow roles**

A user’s ability to interact with a Workflow scenario is controlled by designating the appropriate rights to that user, which determines what actions the user can perform on the Workflow scenario. These user rights, which BusinessObjects Planning site administrators grant, also determine the role that the user assumes in Workflow. There are three types of users who have explicit access to Workflow: submitters, approvers, and Workflow administrators.
Submitters

Submitters are responsible for inputting or editing data for a plan or forecast, then submitting the data for approval. Submitters have rights to check out and check in Workflow scenarios, edit, annotate, and view them, as well as submit them for approval. While there may be several BusinessObjects Planning users who have rights to edit data in a Workflow scenario, only those users identified explicitly as submitters can submit the scenario for approval. In addition, only explicitly identified submitters receive e-mail notifications regarding the scenario’s status changes and due dates.

Approvers

Approvers are responsible for reviewing submitted scenarios and accepting or rejecting the changes. They are granted the same rights as submitters plus the ability to reject and approve Workflow scenarios. Approvers can also change the date that a scenario must be submitted by. This role does not have to be exclusive; a user can be both the submitter and approver of a Workflow scenario. The actions that both submitters and approvers can perform on the scenario are determined by the status of that scenario.

Note: There can be multiple submitters and approvers for a scenario. As a result, after a submitter submits a scenario, it can be approved by one approver, but then rejected by another.

Workflow administrators

Workflow administrators are responsible for creating Workflow scenarios and determining who has access to them and at what level. They also set the Open date (the date on which editing can begin) and the initial Submit by and Approve by dates for a scenario. Workflow administrators can also bypass the standard Workflow process and perform certain actions on a scenario regardless of its current status. Workflow administrators should be members of the system-generated WorkflowAdministrators group, which gives them access to Workflow configuration settings.

Other BusinessObjects Planning users

In addition to these three Workflow roles, there are also other BusinessObjects Planning users who may have rights to view, edit the content in, or modify Workflow scenarios, even though they are not an official part of the Workflow process. For example, there may be several
BusinessObjects Planning users who have rights to input data in a Workflow scenario, but only one user who can submit that data for approval, and one user who can approve that data in a Workflow context.

**Parent and child relationships in Workflow**

In BusinessObjects Planning, the Workflow status of a parent scenario directly affects its child scenarios, and vice versa. For example, if a Workflow plan is made up of a parent scenario and its children, the parent scenario cannot be submitted for approval unless all of its children have already been approved. Likewise, once a parent scenario is approved, all of its children are locked and cannot be rejected unless the parent scenario is rejected. The following rules apply to Workflow scenarios:

- A parent scenario cannot be submitted or approved until all of its children are at Approved status.
- When a scenario is submitted, it is automatically consolidated so it does not contain data that is not tied to its children.
- A child scenario cannot be rejected (and therefore made available for editing) if its parent is at Approved or Submitted status.
- Only when an approved or submitted parent scenario is rejected can all of its children be rejected (and made available for editing).
- Only a Workflow administrator can directly change the status of an approved scenario whose parent is also approved.
- A Workflow plan is considered complete when the Workflow scenario of the plan’s parent unit is approved and hence all of its descendants are approved.

These relationships exist to help prevent unwanted changes to already approved parent-level scenario data by users trying to edit scenarios at the child level. Because all scenarios are automatically consolidated when they are submitted for review, approvers can be sure that the data they are approving in a parent scenario is an accurate and static representation of the sum of all its child scenarios.

**Workflow actions and statuses**

To successfully use Workflow, you should understand the difference between two concepts: a Workflow action versus a Workflow status. A Workflow action is a change that you make to a scenario, such as submitting it for approval, reviewing the scenario, or rejecting it. When you perform an action on a Workflow scenario, the scenario status changes. Depending on its status,
different actions can be performed on a scenario by different users. For example, when a Workflow scenario is at Working status, a submitter can make changes to it, but an approver cannot yet reject the scenario. If the submitter changes the scenario data and submits it for approval, the scenario’s status changes to Submitted and an approver can then approve or reject it.

The following table describes the Workflow statuses found in BusinessObjects Planning.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>This status is system-initiated. All Workflow scenarios will default to Not Started if the current date is prior to the Open date of the scenario. When the current date matches the Open date, the status changes to Working. Scenarios at Not Started status are not included in consolidations.</td>
</tr>
<tr>
<td>Working</td>
<td>A scenario must be at Working status for a submitter to make changes to data. Working status indicates that users who have the appropriate rights can edit the Workflow scenario. When a submitter submits the scenario for approval, its status changes to Submitted. The explicit submitter is notified by e-mail when a scenario is set to Working. Scenarios at Working status are included in consolidations.</td>
</tr>
<tr>
<td>Submitted</td>
<td>When a submitter finishes working on a scenario and submits it for review, the status changes to Submitted. When a scenario is at this status, the submitter can no longer access it to make changes. The approver can approve or reject the scenario, as well as edit it. A Workflow scenario cannot be at Submitted status unless all of its children are approved or it is a leaf scenario. The explicit approver is notified by e-mail when the status of a scenario changes to Submitted. The scenario data is included in consolidations.</td>
</tr>
<tr>
<td>Rejected</td>
<td>When an approver does not accept the changes made to the scenario, he or she rejects the scenario and its status changes to Rejected. The scenario is returned to the original submitter to make further changes. When the submitter checks out a rejected scenario, its status changes to Working. Only when a parent scenario is rejected can its children also be rejected. The explicit submitter is notified by e-mail when a scenario is rejected. Rejected scenarios are not included in consolidations.</td>
</tr>
<tr>
<td>Approved</td>
<td>When an approver approves the scenario, it is locked and no more changes can be made. However, when a scenario is at Approved status, an approver can still reject the scenario to allow for further changes to the data. The explicit submitter is notified by e-mail when a scenario is approved. Approved scenarios are included in consolidations.</td>
</tr>
</tbody>
</table>
The following table illustrates possible status changes based on submitter and approver actions. It assumes that all children of a parent scenario have been approved.

<table>
<thead>
<tr>
<th>Scenario status</th>
<th>Submitters can...</th>
<th>Approvers can...</th>
<th>Scenario status changes to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>N/A</td>
<td>N/A</td>
<td>Working (when the current date matches the Open date)</td>
</tr>
<tr>
<td>Working</td>
<td>Edit, Submit</td>
<td>Edit, Submit, Approve</td>
<td>N/A, Submitted, Approved</td>
</tr>
<tr>
<td>Submitted</td>
<td>N/A</td>
<td>Edit, Approve, Reject</td>
<td>N/A, Approved, Rejected</td>
</tr>
<tr>
<td>Rejected</td>
<td>Edit</td>
<td>Edit</td>
<td>Working, Approved</td>
</tr>
<tr>
<td>Approved</td>
<td>N/A</td>
<td>Reject</td>
<td>Rejected</td>
</tr>
</tbody>
</table>

**Workflow in BusinessObjects Planning**

In BusinessObjects Planning, Workflow capability exists across various Web-based and thick client platforms, providing diverse choices for users who may be accustomed to working in certain environments. This flexibility is desirable when implementing and maintaining Workflow plans, as Workflow users can span a wide range of an organization’s structural hierarchy.

BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, BusinessObjects Planning Analyst, and Workflow Console all possess Workflow capability. The application(s) you choose to use will depend on the role you have in Workflow, the tasks you need to perform, and, as many of the same tasks can be performed in all applications, the preferences you have in the BusinessObjects Planning environment.

**BusinessObjects Planning Administrator and BusinessObjects Planning Analyst**

BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro provide users with a visual representation of their organization’s business model hierarchy and allow them to create and maintain Workflow...
plans using a comprehensive range of formatting features and drag-and-drop functions. More specifically, users with the appropriate rights can perform the following Workflow-related tasks:

- Create and replicate scenarios for Workflow
- Enable and disable Workflow in a scenario
- Grant Workflow-related rights and designate users as submitters and approvers
- Set e-mail notification options
- Set the Open date, Submit by date, and Approve by date for Workflow scenarios
- Change the status of Workflow scenarios
- Replicate changes to Workflow properties down scenarios in a unit hierarchy
- View Workflow history
- View reports associated with Workflow scenarios
BusinessObjects Planning Workflow Console

The BusinessObjects Planning Workflow Console is a Web-based interface that allows users to graphically view and modify information related to the administration, maintenance, and progression of Workflow scenarios. It provides users with a visual representation of the plan hierarchy that they are working in and of Workflow dates relevant to scenarios they are responsible for. It also displays other information related to maintaining Workflow scenarios, such as their due dates, their status, and the last date and time their status was changed. Users with the appropriate rights can perform the following Workflow-related tasks:

• Set the Open date, Submit by date, and Approve by date for Workflow scenarios
• Change the status of Workflow scenarios
• Replicate changes to Workflow properties down scenarios in a unit hierarchy
• View and print the Workflow plan hierarchy, its approvers, submitters, and due dates
• View and print Workflow history
• Launch reports in Analyst that are associated with Workflow scenarios
• View a calendar that displays Workflow dates
BusinessObjects Planning Analyst

BusinessObjects Planning Analyst provides access to real-time report information anywhere, anytime, through a Web browser. Drill-down toolbars allow users to easily view, enter, and edit Workflow data. Users with the appropriate rights can perform the following Workflow-related tasks:

• View, enter, and edit data of Workflow scenarios within the context of a report
• Change the status of Workflow scenarios
• Send other BusinessObjects Planning users a hyperlink to a report associated with Workflow scenarios

Using the BusinessObjects Planning Workflow Console

The BusinessObjects Planning Workflow Console is a Web-based application that helps you carry out your role in the Workflow process by providing a way to monitor Workflow statuses, properties, and due dates from your Web browser.
Note: You cannot use the BusinessObjects Planning Workflow Console while running Microsoft VM. Ensure that Sun® J2SE Runtime Environment 5.0 Update 9 or greater is installed on your machine.

Note: To access the Workflow Console application, the Windows XP Internet Connection Firewall must be turned off. For information, contact your system administrator.

The following sections introduce you to the Workflow Console and describe its basic functions:

- “Starting the Workflow Console” on page 25
- “Workflow toolbar” on page 27
- “Opening a Workflow plan” on page 28
- “The Console layout” on page 28
- “Resizing columns” on page 32
- “Printing information displayed in the Console” on page 33
- “Launching a report” on page 34
- “Searching for information” on page 34
- “Going to a specific row” on page 35
- “Using the Application Log window” on page 35
- “Viewing version information” on page 36

Starting the Workflow Console

Your BusinessObjects Planning administrator provides you with the Web address for the Workflow Console. This address depends on the project or business model that you are working in.

▶ To launch the Workflow Console:

1. From a workstation, open Internet Explorer 5.5 or greater.
2. Type the Workflow Console’s address into the Address field of your browser and press ENTER.

   Note: If you see any security warnings that ask you to trust the content distributed by Business Objects, click Always.
When you start up the Workflow Console, a new browser window opens displaying a screen that tells you it is loading. Once the BusinessObjects Planning Workflow Console has loaded, the Select Workflow Context dialog box appear in your browser.

**Note:** You can have only one session of the Workflow Console open at a time.
Workflow toolbar

The Workflow toolbar is located at the top of the Console window. The following table contains a list of icons you will find on the toolbar along with their functions.

The toolbar also includes a Scenario text box that displays the name of the Workflow scenario you have open in the Console.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Tool Tip</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Change Workflow Context</td>
<td>Opens the Select Workflow Context dialog box, where you can change the context (business model, unit, and scenario) of your Workflow plan.</td>
</tr>
<tr>
<td>🔄</td>
<td>Edit Workflow Properties of Scenario</td>
<td>Opens the Edit Workflow Properties of Scenario dialog box, where you can change a scenario’s status, Workflow dates, and e-mail notification options.</td>
</tr>
<tr>
<td>📈</td>
<td>View Report in Planning Analyst</td>
<td>Launches a report in BusinessObjects Planning Analyst that uses Workflow scenario data from the unit you have selected.</td>
</tr>
<tr>
<td>🔴</td>
<td>History</td>
<td>Opens the Workflow History dialog box, where you can view all Workflow-related history pertaining to the scenario of the unit you have selected.</td>
</tr>
<tr>
<td>🔄</td>
<td>Refresh</td>
<td>Refreshes the information displayed in the Status, Calendar, and Unit Properties pages.</td>
</tr>
<tr>
<td>📕</td>
<td>Print</td>
<td>Sends the information displayed in the Status or Calendar pages to a Web page that you can print.</td>
</tr>
<tr>
<td>🔍</td>
<td>Find</td>
<td>Opens the Find Text dialog box, where you can specify a text string to search for.</td>
</tr>
<tr>
<td>🔍</td>
<td>Find Next</td>
<td>Finds the next occurrence of the text previously specified in the Find Text dialog box.</td>
</tr>
<tr>
<td>🧑‍💻</td>
<td>User Properties</td>
<td>Opens the User Properties dialog box, which displays your BusinessObjects Planning user properties. This information is read-only.</td>
</tr>
<tr>
<td>🤖</td>
<td>BusinessObjects Planning Online Help</td>
<td>Opens the Workflow Console online help in a new browser window.</td>
</tr>
<tr>
<td>🗓️ Week (appears when Calendar page is active)</td>
<td>Displays the timeline on the Calendar page in weekly increments.</td>
<td></td>
</tr>
<tr>
<td>🗓️ Month (appears when Calendar page is active)</td>
<td>Displays the timeline on the Calendar page in monthly increments.</td>
<td></td>
</tr>
</tbody>
</table>
Opening a Workflow plan

To view and edit a Workflow plan, you must first open it by specifying the context of the plan. This context includes the business model and unit that the plan is located in, along with the Workflow scenario that the plan is associated with. BusinessObjects Planning limits the business models, units, and scenarios that you can select to only those objects that you have rights to.

To open a Workflow plan:

1. On the Workflow toolbar, click (Change Workflow Context)

![Select Workflow Context dialog box]

Note: The Select Workflow Context dialog box appears automatically when you start the Workflow Console.

2. In the Select Workflow Context dialog box, select a business model from the Business model list.
3. Select a unit from the Unit list
   OR
   Click 🕵️‍♂️ to perform an advanced search on units.
4. Select a scenario from the Scenario list.
   Note: For the Console to display any information, the scenario you choose must be Workflow-enabled.
5. Click OK.

The Console layout

The BusinessObjects Planning Workflow Console consists of the tree hierarchy and the Status, Calendar, and Unit Properties pages.
Tree hierarchy

The tree hierarchy appears on the left of the Console and is always visible regardless of what page you are viewing. This hierarchy is a visual representation of your organization’s Workflow plan and the units that the plan contains.

You can expand a unit by clicking beside the status icon.
Likewise, you can collapse a unit by clicking beside the status icon.  

Note: The Console displays only the units that you have View Scenario rights on.

The icons beside the units of your tree hierarchy indicate the status of the scenario that each unit contains. For a list of statuses, their definitions, and their icons, see “Workflow actions and statuses” on page 19.

You can change your view of the tree hierarchy at any time by clicking (Change Workflow Context) and selecting a different context (business model, unit, and scenario) for your Workflow plan.

Accessing the Status page

To access the Status page, click the Status tab at the bottom of the Console.
The Status page displays information for each Workflow scenario that you have View rights on. The information you see consists of the following:
• The status of the scenario
• The explicit submitter(s) and approver(s) of the scenario
• The date the scenario’s status last changed
• The date the scenario’s data was last modified
• The name of the user who has the scenario checked out, if applicable
If there is more than one explicit approver and/or submitter for a scenario and their names do not fit in the Approver/Submitter columns, you can either resize the columns or right-click a field in the Approver or Submitter columns and select **View All Approvers** or **View All Submitters** from the menu. BusinessObjects Planning will display a list of all explicit approvers or submitters for that scenario, as shown in the following dialog box:

Accessing the Calendar page

To access the Calendar page, click the **Calendar** tab at the bottom of the Console.

The Calendar page displays information for each Workflow scenario that you have View rights on. The information you see consists of the following:

- The Scenario Status
- The Open date of the scenario
- The Submit By date of the scenario
- The Approve By date of the scenario
- The number of days remaining until the Approve By date
The Calendar page also displays a color-coded timeline for each scenario, which gives you a visual representation of the time periods for submitting and approving a scenario in relation to the current date (represented by the vertical red line). You can choose to display the time periods for submitting and approving in either weeks or months by clicking (Week) or (Month) on the toolbar.

If a scenario passes its Approve by date without being approved, the icon appears under the Days Left column.

Accessing the Unit Properties page

To access the Unit Properties page, click the Unit Properties tab at the bottom of the Console.

To view the Unit properties of the currently selected unit, click the Unit tab on the right pane. The Unit page displays the identifier, name, and default reporting currency of the selected unit.

To view the Workflow rights of the currently selected unit, click the Rights tab on the right pane. The Rights page displays the Workflow rights of all users who have rights on the selected unit. The level of Control, Approve, Submit, and View Scenario rights are indicated by the following symbols:
The information that appears on both the Unit and Rights pages is read-only and is identical to what appears on the Unit Properties page in BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro. If you want to change the properties displayed on these pages and you have the appropriate rights to do so, use BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro.

**Note:** You can also view your user properties at any time in the Console by clicking 🧑‍💻 (User Properties) on the toolbar. This information is read-only and is identical to what appears on the General page of the user properties in BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro.

### Resizing columns

You can change the size of the columns in the Status page and Calendar page of the Console or hide them completely.

**To resize columns:**

1. Move your cursor over the header row of the Console between two columns until the pointer turns into a bi-directional arrow (↔).
2. Click and drag your cursor right or left to expand or collapse the size of the column. (If you move the cursor all the way to the left until it meets the right edge of the preceding column, the column you are resizing becomes completely hidden.)

**Note:** When you exit the Console, the resizing of the columns is not saved.
Printing information displayed in the Console

You can create a copy of the information that is displayed in either the Status page or Calendar page of the Console. When you use the print feature with these pages, BusinessObjects Planning places the information in an HTML file and displays it in another browser window, where you can print or save that information.

Note: The timeline does not print with the rest of the information in the Calendar page.

To print the information displayed in the Status or Calendar page:
1. Open the Workflow plan that contains the information you want to print.
2. Click either the Status or Calendar tab at the bottom of the Console.
3. Click (Print) on the Workflow toolbar. BusinessObjects Planning will generate a report similar to the following:

In the new browser window, you can print this information or save it as an HTML file on your computer.
Launching a report

The Console gives you a visual representation of the properties and structure of a Workflow plan. However, if you want to review the data that is contained in a Workflow scenario, you can do so by viewing a report that uses data from that scenario. From the Workflow Console, you can launch a report in Analyst for each unit in your plan that uses Workflow scenario data.

The Console will open the report in another browser window using Analyst. The report that the Console opens will depend on the status of the Workflow scenario: if the scenario is at Submitted or Approved status, the Console will open the report that was used in the submission of the scenario; if the scenario is at any other status, the Console will open your user default report or your site’s default report and use the Workflow scenario as its data source. (For more information about default reports, see the BusinessObjects Planning Reporting Guide.)

To launch a report in BusinessObjects Planning Analyst from the Workflow Console:

1. From your Workflow plan hierarchy, select the unit that contains the Workflow scenario you want to review.
2. Click (View Report in Planning Analyst) on the toolbar.

Searching for information

You can search for a text string in the rows of the page you are viewing in your Workflow plan. BusinessObjects Planning only searches the rows that are currently expanded.

To search for information in your Workflow plan:

1. Click (Find) on the toolbar.
2. In the Find what text box, type the text string for which you want to search.
3. Select Start from top if you want to start the search from the top of the plan hierarchy instead of the currently selected row.
4. Select **Match case** if you want to make the search case sensitive.

5. Select **Up** to search upwards in the plan hierarchy.
   OR
   - Select **Down** to search downwards in the plan hierarchy.

6. Click **Find**.

7. To find subsequent occurrences of the text string in the plan hierarchy, click **Find**.

**Going to a specific row**

If your Workflow plan is large and you want to select a member of the hierarchy without having to scroll down to it, you can use the Go to Line feature to jump to that member and select it.

Members of the hierarchy are counted starting from the top unit of the hierarchy structure that is visible to you, therefore members that you have expanded are included in the count.

- **To go to a specific row in your Workflow plan:**
  1. Right-click any member of your Workflow plan and select **Go to Line** from the menu.
  2. In the Go To dialog box, type the line number of the member you want to go to.
     - **Note:** If you enter a number that is greater that the number of rows currently visible, no row is selected.
  3. Click **OK**.

**Using the Application Log window**

You can view information, warnings, and error messages using the Console’s Application Log window.

The Application Log window automatically opens when an error message is generated. To open the Application Log window if it is not open, select **Show Application Log** from the View menu.

The information displayed in the Application Log window is for the current session only. Once you close the Workflow Console, the information is lost. Therefore, you may want to save the information as a text file before ending a session. To save the contents of the Application Log window, right-click the window and select **Save as** from the menu. In the Save as dialog box, specify a name and location for the text file and click **Save**.
You can also clear the information in the Application Log window. You may want to do this to see the exact information a particular task generates. If you clear the Application Log window before performing a task, you know that all messages pertain to that task. To clear the contents of the Application Log window, right-click the window and select **Clear All** from the menu.

The amount of information in the window can become quite large and therefore you may need to search for particular information that you require. To search for information, right-click the window and select **Find** from the menu. In the Log Search dialog box, type the string that you want to locate and click **Find**.

To hide the Application Log window, right-click the window and select **Hide** from the menu.

**Viewing version information**

You can view version information about the current build of the BusinessObjects Planning Workflow Console, BusinessObjects Planning Web Gateway, and BusinessObjects Planning Server.

1. From the Help menu, select **About**.
2. Click **OK** in the About BusinessObjects Planning Workflow dialog box when you are finished viewing version information.
Administering Workflow
Overview

This section contains the information necessary for you, the Workflow administrator, to effectively manage your organization’s Workflow plans in BusinessObjects Planning and ensure that the framework for Workflow is functioning efficiently and securely.

This section assumes that you are already familiar with the fundamental concepts of BusinessObjects Planning. Unless otherwise specified, you will perform all of the tasks outlined in this chapter in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro.

The WorkflowAdministrators group

Workflow administrators are responsible for configuring, customizing, and maintaining Workflow in BusinessObjects Planning on behalf of other users. If you take on the role of a Workflow administrator, your BusinessObjects Planning site administrator will assign you to the system-generated WorkflowAdministrators group. BusinessObjects Planning site administrators determine what rights members of the WorkflowAdministrators group possess. These rights may include:

- Approve rights on Workflow scenarios (with full delegation privileges)
- Approve rights on units that are part of Workflow (with full delegation privileges)
- Scenario creation rights

Being a member of the WorkflowAdministrators group, along with the rights above, allows you to perform administrative duties pertaining to Workflow, such as:

- Creating new scenarios for planning and forecasting
- Enabling Workflow in scenarios
- Making changes to a Workflow scenario or replicating changes to a group of Workflow scenarios
- Assigning Submit and Approve rights to the appropriate users
- If necessary, acting on a user’s behalf if that user is away
- Accessing the Workflow Configuration folder
- Setting Workflow due dates and e-mail notification properties

To perform your duties as a Workflow administrator, you require Approve rights on both Workflow scenarios and units that are involved in the Workflow process (with full delegation privileges). All other rights that are granted to you...
are at the discretion of your BusinessObjects Planning site administrator; however, it is best practice for BusinessObjects Planning site administrators to grant Workflow administrators Create Scenario rights. For more information about the specific rights that have been assigned to you as a Workflow administrator, contact your BusinessObjects Planning site administrator.

Understanding Workflow rights

Levels of access to Workflow scenarios are controlled by designating rights to users, which control what actions they can perform on a Workflow plan. In other words, the role that a user plays in Workflow is determined by the rights that you assign to that user.

Submit and Approve rights

Two rights for scenarios and units control Workflow user functions: Submit and Approve. You grant submitters Submit rights and approvers Approve rights. Because rights are inherited in BusinessObjects Planning, anyone with Modify rights on a scenario automatically inherits Submit and Approve rights to that scenario. Likewise, anyone with Control rights on a unit automatically inherits Submit and Approve rights to that unit. Anyone with Approve rights on a scenario or unit automatically inherits Submit rights, although this does not necessarily mean that such a user is the submitter of that scenario or unit (see “Implicit and explicit Workflow rights” on page 41).

The inheritance of rights in BusinessObjects Planning is represented in the diagram below.
Understanding Workflow rights

Scenario and unit rights

Workflow rights are a combination of scenario rights and unit rights. To perform an action on a Workflow scenario, a user must have the appropriate rights at both the scenario and unit levels. In other words, a submitter must have Submit rights on both the scenario and unit to change a Workflow scenario’s status from Working to Submitted. Similarly, an approver must have Approve rights on both the scenario and unit to change a Workflow scenario’s status to Approved or Rejected.

It is best practice to set scenario Workflow rights generally and set unit Workflow rights more specifically. For example, you can have your site administrator create a user group called “Plan Approvers” that includes all users who have Approve rights on any scenario. When you create the master scenario for your Workflow plan, you can give the Plan Approvers group Approve rights to the scenario. When the scenario is replicated through the unit hierarchy, you can restrict which members of the group can approve different units by granting Approve rights only to specific users at each unit.
For example, assume Laura has Approve rights for both a unit and the Workflow scenario it contains. Since rights are inherited in BusinessObjects Planning, Laura also has Submit rights for the scenario and the units. Therefore, she can both approve and submit this scenario. Assume another user, Ian, has Approve rights for the scenario, but only submit rights for the units it contains. As a result of inheritance, Ian also has Submit rights for the scenario. However, because Ian does not have Approve rights for the units, he can only submit the scenario and not approve it.

A script that uses the UpdateWorkflowUserRights function can be created to automate the assigning of Workflow rights at the unit level to BusinessObjects Planning users. For information on this function, see the BusinessObjects Planning Administrator online help.

**Note:** In addition to Approve and Submit rights on Workflow scenarios and units, approvers and submitters also require View rights on the business model in which Workflow is active.

### Implicit and explicit Workflow rights

Through inheritance, some users may have implicit Submit or Approve rights on a unit and the Workflow scenario it contains, but they may not be part of the Workflow process. Users can inherit rights to Workflow for a particular unit if they are BusinessObjects Planning administrators, members of a group that has been granted rights to a scenario, or users who have been granted rights at the parent level of the unit. Although these users may have inherited Workflow rights for a unit, only users who you explicitly grant Submit and Approve rights to on a Workflow scenario at the unit level are considered the submitters and approvers in the Workflow process. Similarly, only users who you grant explicit Submit and Approve rights to will receive e-mail notifications regarding status changes and due dates.

For example, Dave is a user who has Approve rights on an ancestor of a Workflow scenario and is also a member of a group that has Control rights on an ancestor unit. Through inheritance, this situation gives Dave Approve rights to the Workflow scenario. However, Dave’s Workflow administrator did not explicitly grant him Submit or Approve rights to the unit, so he will not receive e-mail notifications and his name will not be listed as a submitter or approver of the plan in the Workflow Console Status page.

**Note:** It is recommended that you explicitly grant Submit and Approve rights to users at each unit to the lowest appropriate level in the hierarchy. If a unit does not have an explicitly defined submitter or approver, “None” will be listed as the name of the approver or submitter on the Status page of the Workflow Console and no e-mail notifications will be sent when the status changes.
To find out how to grant Workflow rights at the unit level, see “Setting Workflow rights” on page 52. For a more detailed discussion on rights in BusinessObjects Planning, see the Administrator’s Guide.

### Loading Workflow rules

Workflow actions, statuses, and roles are governed by a set of pre-defined rules. For example, a Workflow rule could dictate that submitters cannot check out Workflow scenarios once they submit them for approval. Before your organization can use Workflow for the first time, you must load these rules into the Workflow engine so BusinessObjects Planning knows how to manage your site’s Workflow operations.

The BusinessObjects Planning installation package includes a Workflow engine configuration file containing default Workflow rules. If you want to modify these rules, contact your BusinessObjects Planning consultant.

**Note:** The loading and reloading of Workflow rules does not affect the existing attributes or history of Workflow scenarios.

**To load Workflow rules into the Workflow engine:**

1. In the Organizer, expand the Administration folder.
2. Click the Workflow folder.
3. In the right pane of the Organizer, click the Engine tab.
4. On the Engine page, click Update.
5. In the Open dialog box, browse to the location of the BusinessObjects Planning installation package.
6. Double-click the Site folder.
7. Double-click the Workflow folder.
8. Double-click the Schema folder.
9. Select `wf35.wfs` and click Open.
10. On the Engine page, click Apply.

**Note:** You will need to restart any BusinessObjects Planning application servers that are running in order for the changes to take effect.

Once you have loaded the rules onto your site’s Workflow engine, BusinessObjects Planning displays them as an expandable tree on the Engine page. The Engine page can provide you with a good understanding of how Workflow will operate on your site and of what behavior you can expect in specific Workflow-related situations.
Configuring e-mail notification

Before you set up a Workflow plan, it is best practice to configure the e-mail notification feature for Workflow. E-mail notification allows you to inform submitters and approvers of status changes and approaching or passed due dates. When a Workflow scenario changes status or a due date approaches or passes, BusinessObjects Planning can send a system-generated e-mail that notifies all involved submitters and/or approvers.

Before BusinessObjects Planning can send e-mail notifications, you must first set up the appropriate scripts and INI parameters. For more information, see "Setting Up Workflow Scripts and INI Parameters" on page 87.

Listing e-mail addresses

You must ensure that the correct e-mail addresses of all the submitters and approvers involved in your Workflow plan are listed in their user properties. If a user’s e-mail address is not listed, or the address listed is not correct, you must manually add or change the address. A script that uses the ImportUsers function can also be created to automatically import users’ e-mail addresses (for more information, refer to the BusinessObjects Planning Administrator online help or contact your site administrator).

You can notify groups of submitters and approvers using group e-mail addresses. To use group e-mail addresses, an e-mail distribution group must first be set up on your mail system and then attached to a user group in BusinessObjects Planning.

To add or change the e-mail address of a user or group:

1. In the Organizer, expand the Administration folder.
2. Expand the Users or Groups folder and click the desired user or group.
3. In the right pane of the Organizer, click the General tab if it is not already selected.
4. In the E-mail text box on the General page, type the e-mail address of the user or group.

5. Click **Apply**.

**Customizing e-mail notification**

The Workflow folder allows you to customize the frequency of e-mail notifications. The settings that you establish in this folder are global and therefore apply to all Workflow scenarios in your site.

> To customize e-mail notification in Workflow:
> 1. In the Organizer, expand the **Administration** folder.
> 2. Click the **Workflow** folder.
3. On the General page, set e-mail notification options.

You can perform the following actions:

- To enable the e-mail notification feature, select the **Enable e-mail notifications** check box. (To disable all e-mail notifications, clear this check box. No e-mail will be sent when a scenario changes status or a due date is passed.)

- To send an e-mail to the submitter(s) of a Workflow scenario when that scenario's status changes from Not Started to Working and is therefore ready for editing, select the **Send when scenario leaves the Not Started status** check box.

- To send an e-mail to the submitter(s) of a Workflow scenario to remind them of the date by which the scenario must be submitted, select the **Send when Submit date is approaching** check box and type the number of days prior to the Submit by date that you want the e-mail to be sent.

- To send an e-mail to the approver(s) of a Workflow scenario to remind them of the date by which the scenario must be approved, select the **Send when Approve date is approaching** check box and type the number of days prior to the Approve by date that you want the e-mail to be sent.

- To send an e-mail to the submitter(s) and approver(s) of a Workflow scenario when the Approve by date passes while the scenario is still at Working status, select the **Send when scenario becomes Past Due** check box.
Note: If you make unwanted changes to the e-mail notification settings before you click Apply, you can restore the previous settings by clicking Undo.

4. When you are satisfied with the settings, click Apply.

Setting the content of e-mail notifications

From the Workflow folder, you can also control the content of e-mail notifications. BusinessObjects Planning provides you with standard templates that automatically extract information specific to each Workflow action. You can use these templates for your organization’s e-mail notifications or you can modify, add, and delete text in the templates.

Note: If you want to restore the default text of the e-mail notification templates after you make changes to them, you will need to copy the original template files (*.ntp) from the BusinessObjects Planning installation CD to your <BusinessObjects_share>\Workflow\Templates folder, then clear each file’s read-only attribute.

To set the content of e-mail notifications in Workflow:

1. In the Organizer, expand the Administration folder.
2. Click the Workflow folder.
3. In the right pane of the Organizer, click the Notification Templates tab.
4. From the Template list, select the template that you want to modify.
5. Make any desired changes to the Subject, Header, Body, and Footer fields of the template.

In addition to using normal text in your e-mail notifications, you can also automatically retrieve Workflow scenario attributes (such as the name of a scenario or its current status) by typing the attribute name between braces ( { } ) in your template. For example, if you wanted to use the local date and time of a scenario’s current Submit by date in a sentence, the sentence in your template might look like the following:

The date by which you must submit this scenario for approval is {SubmitBy:New:TimeLocal}.

For a list of possible Workflow scenario attributes, refer to the BusinessObjects Planning Administrator online help.

**Note:** You can preview the e-mail notification by clicking **Preview**. If you make unwanted changes to the e-mail notification template before you click **Apply**, you can restore the previous text by clicking **Undo**.

6. If you are satisfied with the template, click **Apply**.

### Setting up a Workflow plan

As a Workflow administrator, you are the only BusinessObjects Planning user who can enable Workflow functionality in scenarios. As a result, you are responsible for setting up your organization’s Workflow plans.

Setting up a new Workflow plan is a multi-step procedure. There are various ways to set up a Workflow plan, but if the scenario and unit hierarchy that you want to use for your plan already exist, and you possess Create Scenario rights, you will typically carry out this procedure as follows:

1. Ensure that the e-mail notification feature for Workflow status changes and due dates is configured. For more information, see “Configuring e-mail notification” on page 43.

2. Choose the scenario that you want to use as the base for your Workflow plan. Because you will need to replicate this scenario, it is best practice to ensure that the scenario is a scenario template and that it is part of the TEMPLATE folder found at the top level of the unit hierarchy in which you are implementing Workflow. (If you cannot locate the TEMPLATE folder, contact your BusinessObjects Planning site administrator.)

3. Enable Workflow in the chosen scenario and set the default due dates and scenario rights. This scenario is now considered the master scenario of your Workflow plan.

4. Replicate the master Workflow scenario down the unit hierarchy.
Setting Workflow properties

After you have chosen the scenario that you want to use as the base for your Workflow plan, you can enable Workflow in that scenario and set the scenario’s Workflow rights and dates. It is also best practice to give the scenario a unique identifier that will distinguish it as a Workflow scenario. When setting these properties, keep in mind that they will be replicated down the unit hierarchy along with the scenario; therefore, choose properties that would be appropriate as the default settings for all of your plan’s scenarios.

To specify a scenario identifier and name:
1. Right-click the scenario that you want to use as the master scenario for your Workflow plan and select Properties from the menu.
2. In the Identifier text box on the General page, type a new and unique identifier that distinguishes the scenario as a Workflow scenario. It is best practice to be consistent with your naming conventions. For example, all Workflow scenarios could follow the convention of [YEAR][TIME PERIOD]P_WF, as in 2005MP_WF.
3. In the Name text box, type a name for the Workflow scenario. (For example, 2005 Workflow Monthly Plan.)
4. Click OK.

To enable Workflow in a scenario and set Workflow-related properties:
1. Right-click the scenario that you want to use as the master scenario for your Workflow plan and select Properties from the menu.
2. Click the **Workflow** tab.

3. On the **Workflow** page, select the **Enable Workflow in Model** check box.  
   **Warning:** Once you enable Workflow in a scenario, it is strongly recommended that you do not disable it by clearing the Enable Workflow in Model check box. This action would permanently delete all Workflow-related history and audit information for the scenario. For more information, see “Disabling Workflow” on page 63.

4. From the Current Status list, select the Workflow status that you want the scenario to default to.

5. Select the Open date and time, Submit by date and time, and Approve by date and time for the scenario. If you do not specify times, they will default to 12:00am.
   **Note:** You have the option to display Workflow dates and times in local time or GMT (Greenwich Mean Time). Displaying dates and times in GMT is useful if your Workflow plan encompasses users who are located in more than one time zone.

6. Click the **Rights** tab.

7. On the Rights page, click ![Add User(s)](Add User[s]).

8. In the Select Users/Groups window, expand the Users or Groups folder.

9. Drag and drop the user(s) and/or group(s) that you want to have scenario Workflow rights onto the Rights page.

10. When you have finished adding, close the Select Users/Groups window.

11. To grant a user or group Submit rights on this Workflow scenario and all scenarios below it, click the left button under the Submit column until ![appears.](appears).  
    To grant a user or group Submit rights on this single scenario only, click the left button under the Submit column until ![appears.](appears).  
    To grant a user or group the right to delegate their Submit rights at all sites, click the right button under the Submit column until ![appears.](appears).  
    To grant a user or group the right to delegate their Submit rights within their site only, click the right button under the Submit column until ![appears.](appears).

12. To grant a user or group Approve rights on this Workflow scenario and all scenarios below it, click the left button under the Approve column until ![appears.](appears).
To grant a user or group Approve rights on this single scenario only, click the left button under the Approve column until \[\text{A}\] appears.

To grant a user or group the right to delegate their Approve rights at all sites, including your own site, click the right button under the Approve column until \[\text{S}\] appears.

To grant a user or group the right to delegate their Approve rights within their site only, click the right button under the Approve column until \[\text{S}\] appears.

**Note:** If you want to grant Workflow rights to a user or group that already has inherited rights on the scenario (such as a site administrator), you must right-click the left button under the Approve or Submit column and select **Regrant**.

13. When you have finished granting rights, click **OK**.

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**Replicating a master Workflow scenario down the unit hierarchy**

Each unit in your Workflow plan must contain its own copy of the Workflow scenario that you are using as the master for your plan. This step gives each unit access to the Workflow scenario’s data. After you set up the master Workflow scenario, you can quickly copy it into every unit of your plan by replicating the scenario down your plan’s unit hierarchy. When you replicate the master Workflow scenario, all rights associated with it are also replicated down the hierarchy, along with the scenario’s current status and due dates (which you set in the scenario properties). However, once you replicate a Workflow scenario, its properties are no longer linked to the properties of the replicated scenarios. That is, if you change, for example, a due date in the properties of a Workflow scenario, that change does not automatically replicate down the hierarchy. These relationships exist so that scenarios at the unit level can be modeled after one master Workflow scenario. As a result, they share a common data set, yet can be individually configured to specify different submitters and approvers, rights, and Workflow dates if necessary.

It is important to consider the level at which your organization wishes to implement the Workflow plan before replicating the master Workflow scenario. For example, you may have a unit hierarchy that exclusively
represents your plan input structure. In this case, you would want to replicate the scenario to each level of the plan from the top-most unit to the bottom-level child units in the hierarchy.

If new units are added to the hierarchy after you replicate the master Workflow scenario, you can re-replicate it down the hierarchy to the new unit(s). If you have made changes to Workflow dates or rights at the unit level of your plan, by default, these changes will not be overwritten by the master Workflow scenario. However, you can choose to globally update the properties of scenarios at the unit level by explicitly stating the changes you wish to make in the scope of operations dialog box (for more information, see “Replicating Workflow properties” on page 57).

To replicate a master Workflow scenario down the unit hierarchy:
1. In the Organizer, expand the Information folder.
2. Select the unit at the top of the hierarchy in which you want to implement Workflow.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the white space in the right pane of the Organizer and select Replicate from the menu.
5. In the Scenario Template dialog box, select the unit that contains the scenario you want to replicate from the Unit list. Typically, you will select TEMPLATE.
6. From the Scenario list, select your master Workflow scenario.
7. Click Apply.
8. In the Scope of Operation dialog box, select the target units:
   - Current unit – replicate the Workflow scenario only in the unit that you have selected.
   - All intermediary child units – replicate the Workflow scenario in all intermediary units of the unit you have selected
   - All bottom level child units (Leaf units) – replicate the Workflow scenario on all bottom-level units under the unit you have selected

If you are replicating the Workflow scenario down the entire unit hierarchy, select all the available check boxes.
9. Click OK.
Changing Workflow properties at the unit level

After you build the structure of your Workflow plan by creating a master Workflow scenario and replicating it down a unit hierarchy, you can begin customizing each scenario at the unit level to take into account the submitters and approvers, user rights, and Workflow dates that are specific to each unit. It is not likely that your Workflow plan calls for the same user to submit and approve every unit in your plan, nor is it likely that the Open date, Submit by date, and Approve by date will be identical for every unit. Therefore, finalizing the details at the unit level is a crucial step in building an effective Workflow plan.

You can also automate many tasks associated with this step by using scripts. For more information, refer to the BusinessObjects Planning Administrator online help.

Setting Workflow rights

Workflow rights are a combination of scenario rights and unit rights. Both sets of rights must be properly configured at the unit level before BusinessObjects Planning can designate users as submitters and approvers. This process can be simplified if user groups are created for the submitters and approvers of your organization and are granted the appropriate scenario rights on the master Workflow scenario. When this scenario is replicated down your plan's unit hierarchy, the rights of those user groups are also replicated, making it necessary to only set rights on the unit, not the scenario (for more information, see “Understanding Workflow rights” on page 39).

If necessary, you can also carry out the procedure outlined below for setting Workflow rights on scenarios at the unit level. Workflow rights on a scenario can be set in the scenario’s Properties on the Rights page. Once the designated submitters and approvers are given Workflow rights on both the unit and scenario, their names will appear on the status page of the Workflow Console and on the Workflow page of the scenario’s Properties.

For a more detailed discussion on granting rights in BusinessObjects Planning, see the Administrator’s Guide.

To set Workflow rights at the unit level:

1. In the Organizer, expand the Information folder until you are able to see the business model in which your Workflow plan is active.
2. Expand the business model until you are able to see the unit that you want to set Workflow rights for.
3. Right-click the unit and select **Properties** from the menu.
4. In the right pane of the Organizer, click the **Rights** tab. On the Rights page, click ![Add User](Add User). Expand the Users or Groups folder.
5. Drag and drop the user(s) and/or group(s) that you want to have Workflow rights onto the Rights page.
6. When you have finished adding, close the Select Users/Groups window.
7. To grant a user or group Submit rights on this unit and all units below it, click the left button under the Submit column until ![Submit](Submit) appears. To grant a user or group Submit rights on this single unit only, click the left button under the Submit column until ![Submit](Submit) appears.
8. To grant a user or group the right to delegate their Submit rights at all sites, click the right button under the Submit column until ![Delegate](Delegate) appears. To grant a user or group the right to delegate their Submit rights within their site only, click the right button under the Submit column until ![Delegate](Delegate) appears.
9. To grant a user or group Approve rights on this unit and all units below it, click the left button under the Approve column until ![Approve](Approve) appears. To grant a user or group Approve rights on this single unit only, click the left button under the Approve column until ![Approve](Approve) appears.
10. To grant a user or group the right to delegate their Approve rights at all sites, click the right button under the Approve column until ![Delegate](Delegate) appears. To grant a user or group the right to delegate their Approve rights within their site only, click the right button under the Approve column until ![Delegate](Delegate) appears.
   **Note:** If you want to grant Workflow rights to a user or group that already has inherited rights on the unit (such as a site administrator), you must right-click The left button under the Approve or Submit columns and select **Regrant**.
10. When you have finished granting rights, click **Apply**.
Setting Workflow dates

Dates associated with a Workflow plan include the Open date, Submit by date, and Approve by date. These dates are initially set in the master Workflow scenario and then replicated down the unit hierarchy. Consequently, these replicated dates become the default for all scenarios in your plan. However, you will probably want to change Workflow dates at the unit level to accommodate different users and circumstances. You can change Workflow dates in BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, and the Workflow Console.

To set the Workflow dates of a scenario using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:

1. In the Organizer, expand the Information folder until you are able to see the business model in which your Workflow plan is active.
2. Expand the business model until you are able to see the unit in which you want to change the Workflow dates, then click the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario of the unit and select Properties from the menu.
5. Click the Workflow tab.
6. Make any necessary changes to the Open Date, Submit by, and Approve by fields. (Click \( \square \) to choose a new Workflow date from the calendar. You can also specify a new time. If you do not specify a time, it will default to 12:00am.)

   **Note:** If you change the Open date or Approve by date of a Workflow scenario, all explicit submitters and approvers of that scenario will receive an e-mail notifying them of the change. If you change the Submit by date, only the explicit submitters will receive the e-mail.
7. Click OK.
8. In the Workflow Notifications dialog box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.
9. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, or you want no e-mail notifications regarding the change to be sent at all, click Change Email Options.
10. To turn off all e-mail notifications for the current change you are making, select the Do not send Workflow email notification check box.

OR

To select additional users who you want to receive the e-mail notification for the change you are making, click To. When you have finished selecting users, click OK.

11. Click OK.

12. In the Workflow Notifications dialog box, click OK to confirm your settings and make the specified change in Workflow properties to the scenario.

To set the Workflow dates of a scenario using the Workflow Console:

1. In the Workflow Console, open the Workflow plan that contains the scenario whose Workflow dates you want to change.

2. Expand the hierarchy until you see the unit that contains the scenario in which you want to change the Workflow dates.

3. Click the unit, then click Edit Workflow Properties of Scenario on the toolbar.

4. In the Edit Workflow Properties of Scenario dialog box, click beside the date field(s) to select a new date from the calendar.

5. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

6. Click Next.

7. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click Add.

OR

If you do not want to send e-mail notifications, select Do not send workflow notifications.

8. Click Finish.

Changing Workflow status

As a Workflow administrator, you can change the status of a scenario even though you are not the submitter or approver of that scenario. This ability to change status is useful, for example, when Workflow scenarios need to be modified after they have been approved. When changing the status of
scenarios that have progressed along the Workflow life cycle, it is important to keep in mind their parent/child relationships. For example, after you reject a parent scenario, all of its direct descendants can also be rejected and can therefore become open to editing. This situation would allow users to modify the previously locked data of the child scenarios. For more information on parent and child relationships and Workflow, see “Understanding Workflow”.

You can change the status of a scenario in BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, or the Workflow Console.

► To change the status of a scenario using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:
1. In the Organizer, expand the Information folder until you are able to see the business model in which your Workflow plan is active.
2. Expand the business model until you are able to see the unit in which you want to make the change in Workflow status, then click the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario of the unit and select Properties from the menu.
5. Click the Workflow tab.
6. On the Workflow page, choose a new status for the scenario from the Current Status list.
   
   **Note:** You cannot change the status of a scenario from Not Started to Working if its Open date is in the future. Likewise, you cannot change the status of a scenario to Not Started if its Open date is in the past. To make these status changes, you must first modify the Open date of the scenario.
7. Click OK.
8. In the Comments for Workflow Email Notification and History field, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.
9. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, or you want no e-mail notifications regarding the change to be sent at all, click Change Email Options.
10. To turn off all e-mail notifications for the current change you are making to
the scenario, select the Do not send Workflow email notification check
box.

OR

To select additional users who you want to receive the e-mail notification
for the change you are making, click To. When you have finished
selecting users, click OK.

11. Click OK.

12. In the Workflow Notifications dialog box, click OK to confirm your settings
and make the specified change in Workflow properties to the scenario.

To change the status of a scenario using the Workflow Console:

1. In the Workflow Console, open the Workflow plan that contains the
scenario whose status you want to change.

2. Expand the tree hierarchy until you are able to see the unit in which you
want to make the change in Workflow status.

3. Click the unit, then click (Edit Workflow Properties of Scenario) on the
toolbar.

4. In the Edit Workflow Properties of Scenario dialog box, locate the
Workflow Action section and select a new status from the to list.

5. In the Comments text box, type any comments regarding the changes in
Workflow properties that you are making. These comments will be sent
with the e-mail notifications and will also be logged in the Workflow
history.

6. Click Next.

7. If you want an e-mail notification about this change to be sent to users
other than the explicit submitter(s) and approver(s) of the scenario, select
the users and click Add.

OR

If you do not want to send e-mail notifications, select Do not send
workflow notifications.

8. Click Finish.

Replicating Workflow properties

If you want to make the same changes in Workflow-related properties to
scenarios at different levels of your plan’s hierarchy, you do not have to
individually modify the properties of each scenario. You can globally modify
these properties in all scenarios by replicating your changes down the unit hierarchy. This procedure can be done in BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, or the Workflow Console.

**Replicating Workflow dates**

You can set the Workflow dates of a group of scenarios down a plan hierarchy in one operation.

► To replicate changes in Workflow dates using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:

1. In the Organizer, expand the Information folder until you are able to see the business model in which your Workflow plan is active.
2. Expand the business model until you are able to see the unit from which you want to replicate the change in Workflow dates, then select the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario of the unit and select Workflow Operations, Change Workflow Properties from the menu.
5. On the General page of the Scope of Operation dialog box, select the target unit(s) of your changes:
   - **Current unit** – change the Workflow dates only in the unit that you have selected
   - **All intermediary child units** – change the Workflow dates in all intermediary units of the unit you have selected
   - **All bottom level child units (Leaf units)** – change the Workflow dates on all bottom-level units under the unit you have selected
6. Click the Workflow tab.
7. Select the check box of the Workflow date(s) you want to change (either Change Open Date to, Change Submit by Date to, or Change Approve by Date to).
8. Click to choose a new Workflow date from the calendar. You can also specify a new time. If you do not specify a time, it will default to 12:00am.

**Note:** If you change the Open date or Approve by date of a Workflow scenario, all explicit submitters and approvers of that scenario will receive an e-mail notifying them of the change. If you change the Submit by date, only the explicit submitters will receive the e-mail.
9. In the Comments for Notification and History field, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

10. If you want e-mail notifications about these changes to be sent to users other than the explicit submitter(s) and approver(s) of the affected scenarios, or you want no e-mail notifications regarding the changes to be sent at all, click Change Email Options.

11. To turn off all e-mail notifications for the current changes you are making, select the Do not send Workflow email notification check box.

   OR

   To select additional users who you want to receive e-mail notifications for the changes you are making, click To. In the Additional Email Notification Recipients dialog box, you can choose from a list of users on your BusinessObjects Planning site. When you have finished selecting users, click OK.

12. In the Workflow Email Notification Options dialog box, click OK.

13. In the Scope of Operation dialog box, click OK to confirm your settings and replicate the specified changes in Workflow properties.

To replicate changes in Workflow dates using the Workflow Console:

1. In the Workflow Console, open the Workflow plan that contains the scenarios whose Workflow dates you want to change.

2. Expand the tree hierarchy until you are able to see the unit from which you want to replicate the change in Workflow dates.

3. Click the unit, then click (Edit Workflow Properties of Scenario) on the toolbar.

4. In the Edit Workflow Properties of Scenario dialog box, select the target unit(s) of your Workflow date changes in the Scope section (choose all that apply):

   • Current unit – change the Workflow date(s) only in the unit that you have selected

   • All intermediary child units – change the Workflow date(s) in all intermediary units of the unit you have selected

   • All bottom level child units (leaf units) – change the Workflow date(s) in all bottom-level units under the unit you have selected

   • Perform this operation only on units expanded in the workflow tree – change the Workflow date(s) of the currently expanded units in the Workflow plan hierarchy
5. Click \( \checkmark \) beside the date field(s) to select a new date from the calendar.

6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

7. Click **Next**.

8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click **Add**.

   OR

   If you do not want to send e-mail notifications, select **Do not send workflow notifications**.

9. Click **Finish**.

### Replicating Workflow status

You can change the Workflow status of a group of scenarios down a plan hierarchy in one operation.

1. **To replicate changes in Workflow status using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:**

   1. In the Organizer, expand the **Information** folder until you are able to see the business model in which your Workflow plan is active.
   2. Expand the business model until you are able to see the unit from which you want to replicate the change in Workflow status, then select the unit.
   3. At the bottom of the right pane of the Organizer, click the **Scenarios** tab if it is not already selected.
   4. Right-click the Workflow scenario of the unit and select **Workflow Operations, Change Workflow Properties** from the menu.
   5. On the General page of the Scope of Operation dialog box, select the target unit(s) of your changes:

      - **Current unit** – change the Workflow status only in the unit that you have selected
      - **All intermediary child units** – change the Workflow status in all intermediary units of the unit you have selected
      - **All bottom level child units (Leaf units)** – change the Workflow status on all bottom-level units under the unit you have selected

   6. Click the **Workflow** tab.
7. Select the **Change Workflow status** check box.

8. Select a status from the From list. The status that you choose determines which scenarios your changes are applied to. For example, if you choose **Working**, BusinessObjects Planning will only change the status of the scenarios that are currently at Working status. If you choose **Any**, BusinessObjects Planning will change the status of all scenarios that you specified in the Scope of Operation dialog box, regardless of their current status.

9. Select a status from the To list. All appropriate scenarios will change to the status that you specify from this list.

   **Note:** You cannot change the status of a scenario from Not Started to Working if its Open date is in the future. Likewise, you cannot change the status of a scenario to Not Started if its Open date is in the past. To make these status changes, you must first modify the Open date of the scenario.

10. In the Comments for Notification and History field, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

11. If you want e-mail notifications about these changes to be sent to users other than the explicit submitter(s) and approver(s) of the affected scenarios, or you want no e-mail notifications regarding the changes to be sent at all, click **Change Email Options**.

12. To turn off all e-mail notifications for the current changes you are making, select the **Do not send Workflow email notification** check box.

   OR

   To select additional users who you want to receive e-mail notifications for the changes you are making, click **To**. In the Additional Email Notification Recipients dialog box, you can choose from a list of users on your BusinessObjects Planning site. When you have finished selecting users, click **OK**.

13. In the Workflow Email Notification Options dialog box, click **OK**.

14. In the Scope of Operation dialog box, click **OK** to confirm your settings and replicate the specified changes in Workflow properties.

   ► **To replicate changes in Workflow status using the Workflow Console:**

   1. In the Workflow Console, open the Workflow plan that contains the scenarios whose status you want to change.

   2. Expand the tree hierarchy until you are able to see the unit from which you want to replicate the change in Workflow status.
3. Click the unit, then click (Edit Workflow Properties of Scenario) on the toolbar.

4. In the Edit Workflow Properties of Scenario dialog box, select the target unit(s) of your Workflow status changes in the Scope section (choose all that apply):
   - **Current unit** – change the Workflow status only in the unit that you have selected
   - **All intermediary child units** – change the Workflow status in all intermediary units of the unit you have selected
   - **All bottom level child units (leaf units)** – change the Workflow status in all bottom-level units under the unit you have selected
   - **Perform this operation only on units expanded in the workflow tree** – change the Workflow status of the currently expanded units in the Workflow plan hierarchy

5. Select a status from the **Change workflow status from** list. The status that you choose here determines which scenarios your changes are applied to. For example, if you choose **Working**, BusinessObjects Planning will only change the status of the scenarios that are currently at Working status. If you choose **Any**, BusinessObjects Planning will change the status of all scenarios that you specified in the Scope section, regardless of their current status.

6. Select a status from the **to** list. All appropriate scenarios will change to the status that you specify from this list.
   
   **Note:** You cannot change the status of a scenario from Not Started to Working if its Open date is in the future. Likewise, you cannot change the status of a scenario to Not Started if its Open date is in the past. To make these status changes, you must first modify the Open date of the scenario.

7. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

8. Click **Next**.

9. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click **Add**.
   OR
   If you do not want to send workflow notifications.**

   BusinessObjects Planning Workflow Guide
10. Click Finish.

Disabling Workflow

Once you have enabled Workflow in a scenario by selecting the Enable Workflow in Model check box, it is not recommended that you disable Workflow by clearing this check box. It is also not recommended that you disable Workflow by using the Disable Workflow option on the right-click menu of a scenario. Using these methods to disable Workflow in a scenario will cause the deletion of all Workflow history and audit information related to that scenario. This kind of information is very useful if there is ever a need to investigate changes that occurred to the data of a scenario, and therefore should not be deleted unless the information is deemed superfluous.

It is possible to safely disable Workflow in a scenario and still retain its Workflow history and audit information. If you have Create Scenario rights, you can create a new scenario that is not Workflow enabled and copy all data from the original Workflow enabled scenario to the new scenario. You can then use the new scenario in place of the old Workflow enabled scenario, but still keep the old version to have its Workflow history information. If you do not have Create Scenario rights, contact your site administrator for assistance.

Disabling Workflow in a scenario

You can disable Workflow in an individual scenario that is part of your Workflow plan.

To disable Workflow and delete all Workflow-related information in a scenario:

1. In the Organizer, expand the Information folder until you are able to see the business model in which your Workflow plan is active.
2. Expand the business model until you are able to see the unit that contains the scenario in which you want to disable Workflow, then select the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario of the unit and select Properties from the menu.
5. Click the Workflow tab.
6. On the Workflow page, clear the Enable Workflow in model check box.
7. In the warning dialog box, click Yes.
8. Click OK.
9. In the second warning dialog box, click Yes.

Disabling Workflow in a unit hierarchy

You can also disable Workflow in an entire unit hierarchy or parts of a hierarchy by replicating the changes you make to Workflow properties.

To disable Workflow in a unit hierarchy and delete all Workflow-related information:

1. In the Organizer, expand the Information folder until you are able to see the business model in which your Workflow plan is active.
2. Expand the business model until you are able to see the unit that contains the scenario from which you want to replicate the disabling of Workflow, then select the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario of the unit and select Workflow Operations, Disable Workflow from the menu.
5. On the General page of the Scope of Operation dialog box, select the target unit(s) of your changes:
   - Current unit – disable Workflow only in the unit that you have selected
   - All intermediary child units – disable Workflow in all intermediary units of the unit you have selected
   - All bottom level child units (Leaf units) – disable Workflow on all bottom-level units under the unit you have selected

If you wanted to disable Workflow in an entire unit hierarchy, you would select all of the above check boxes. Make sure the Perform this operation only on units which are currently expanded in the left hand tree check box is cleared.
6. Click OK.
7. In the warning dialog box, click Yes.

Note: If you decide to re-enable Workflow in a unit hierarchy after you have disabled it, you can do so by right-clicking the parent scenario and selecting Workflow Operations, Enable Workflow from the menu. You can then use the Scope of Operation dialog box to replicate your changes down the unit hierarchy and set new default Workflow properties.
Maintaining Workflow Scenarios
Overview

When a Workflow scenario reaches its Open date, its data is available for editing by BusinessObjects Planning users. During its life cycle, the Workflow scenario can go through multiple edits and status changes before approval is attained. Submitters and approvers are generally the BusinessObjects Planning users who are responsible for maintaining the data of their organization's Workflow plan.

This section outlines topics related to the successful progression of scenarios along the Workflow life cycle.

Submitting a scenario for approval

If you are the person responsible for deciding when a Workflow scenario and the data it contains are ready to be sent off for review and approval, you are the submitter of that scenario. As a submitter, you must have Submit rights on both the unit(s) and scenario(s) that you are responsible for. One way of knowing that you are an explicit submitter for a Workflow scenario is if your name is listed under the 'Submitter' column on the Status page of the Workflow Console.

Once you or other BusinessObjects Planning users have inputted or edited information in the Workflow scenario, and you are satisfied with the data that the scenario contains, you can submit that scenario for review and approval. However, if a Workflow scenario is checked out by another user, you cannot submit that scenario until it is checked back in.

Note: You can only submit a Workflow scenario for approval if it is a leaf scenario, or all of its children are at Approved status.

While preparing the scenario for submission, you should keep in mind the date by which the scenario must be ready to submit (the Submit by date). Also keep in mind that while you may be responsible for editing and entering data, and ultimately submitting the Workflow scenario, other BusinessObjects Planning users could also have rights to modify the scenario and may change its data without your knowledge. It is therefore important that you review all data contained in the scenario before you submit it.

Note: You can only modify the data of a Workflow scenario when it is at Working or Rejected status.

When you submit a Workflow scenario, its status changes from Working to Submitted, and an e-mail notification is sent to the approver of the scenario to inform him or her that the scenario is ready for review. If the approver rejects the scenario that you submitted, its status changes from Submitted to
Rejected, and you will receive an e-mail notifying you of the rejection. The first time you check out the scenario to make corrections or additions, its status changes from Rejected to Working, which reopens the scenario for editing and eventual resubmission.

You can submit a scenario using BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, BusinessObjects Planning Analyst, or Workflow Console.

For information on how to enter or edit data in a scenario using the various BusinessObjects Planning platforms, see the Administrator’s Guide, BusinessObjects Planning Analyst User Guide, or BusinessObjects Planning Excel Analyst User Guide.

**Submitting in BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro**

BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro give you a visual representation of your business model’s hierarchy and allows you to view reports and both view and change the Workflow properties of scenarios.

1. In the Organizer, expand the Information folder until you see the business model in which your Workflow plan is active.
2. Expand the business model until you see the unit that contains the scenario you want to submit, then select the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario and select Workflow Operations, Change Workflow Properties from the menu.
5. On the General page of the Scope of Operation dialog box, select the target unit(s) of your changes. If you are the submitter for multiple Workflow scenarios in a hierarchy and you want to submit more than one Workflow scenario at the same time, you can do so by selecting the appropriate check boxes:
   - **Current unit** – change the Workflow status only in the unit that you have selected
   - **All intermediary child units** – change the Workflow status in all intermediary units of the unit you have selected
• **All bottom level child units (Leaf units)** – change the Workflow status on all bottom-level units under the unit you have selected

6. Click the **Workflow** tab.
7. On the Workflow page, select the **Change Workflow status** check box.
8. In the From list, select **Working**.
9. In the To list, select **Submitted**.
10. In the Comments for Notification and History field, type any comments regarding the change in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.
11. If you want e-mail notifications about the change to be sent to users other than the explicit submitter(s) and approver(s) of the affected scenario(s), or you want no e-mail notifications regarding the change to be sent at all, click **Change Email Options**.
12. To turn off all e-mail notifications for the current change you are making, select the **Do not send Workflow email notification** check box.
   OR
   To select additional users who you want to receive e-mail notifications for the change you are making, click **To**. In the Additional Email Notification Recipients dialog box, you can choose from a list of users on your BusinessObjects Planning site. When you have finished selecting users, click **OK**.
13. In the Workflow Email Notification Options dialog box, click **OK**.
14. In the Scope of Operation dialog box, click **OK** to confirm your settings and make the specified change in Workflow properties.

**Submitting in Analyst**

Analyst allows you to quickly submit Workflow scenarios that are part of reports you have open. This option allows you to easily enter, edit, review, and submit data within the context of a report and without having to change applications.

**Note:** Reports are a filtered view of a scenario, and often they do not show you all of the data that a scenario contains. When you submit a scenario within a report, you are not only submitting the data that is visible to you in Analyst, but also the data that may not be included in the report.
To submit a Workflow scenario using BusinessObjects Planning Analyst:

1. Open a report in BusinessObjects Planning Analyst that uses data from the Workflow scenario you want to submit.
   
   **Note:** If you have made any changes to the scenario’s data in Analyst, click (Save) on the main toolbar, select the check them in option in the Save dialog box, and click Save before continuing.

2. If necessary, drill down to the unit that contains the scenario you want to submit.

3. Click (Workflow Action) on the main toolbar.

4. In the Perform Workflow Action dialog box, select the scenario you want to perform the Workflow action on.

5. Select the **Submit for Approval** option.

6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

7. Click Next.

8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click Add.

   OR

   If you do not want to send e-mail notifications, select **Do not send workflow notifications**.

9. Click Finish.

For more information on navigating in and features of BusinessObjects Planning Analyst, see BusinessObjects Planning Analyst User Guide.

**Submitting in the Workflow Console**

The Workflow Console provides you with a visual representation of the plan hierarchy that you are working in and of Workflow dates relevant to scenarios you are responsible for submitting. It also displays other information related to maintaining Workflow scenarios, such as their due dates, their status, and the last date/time their status was changed.

**Note:** The Workflow Console will only display the Workflow scenarios that you have View rights on.
If you want to quickly submit a scenario in the Workflow Console, you can do so by right-clicking the unit that contains the scenario and selecting **Change Status** and **Submitted** from the menu. This action will submit the selected scenario and send e-mail notifications using default settings. If you want to submit a scenario and change the e-mail notification settings for the status change you are making, or you want to submit more than one scenario at once, follow the procedure below.

**To submit a Workflow scenario using the Workflow Console:**

1. Expand the hierarchy until you see the unit that contains the Workflow scenario you want to submit.

2. Select the unit and click **Edit Workflow Properties of Scenario** from the toolbar to open the Edit Workflow Properties of Scenario dialog box.

3. If you are the submitter for multiple Workflow scenarios in a hierarchy and you want to submit more than one Workflow scenario at the same time, you can do so by selecting the target unit(s) of your Workflow status change in the Scope section (choose all that apply):
   
   - **Current unit** – change the Workflow status only in the unit that you have selected
   
   - **All intermediary child units** – change the Workflow status in all intermediary units of the unit you have selected
   
   - **All bottom level child units (leaf units)** – change the Workflow status in all bottom-level units under the unit you have selected
   
   - **Perform this operation only on units expanded in the workflow tree** – change the Workflow status of the currently expanded units in the Workflow plan hierarchy

4. In the **Change workflow status from** list, select **Working**.

5. From the **to** list, select **Submitted**.

6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

7. Click **Next**.

8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click **Add**.

   OR

   If you do not want to send e-mail notifications, select **Do not send workflow notifications**.
9. Click **Finish**.

**Approving a scenario**

If you are responsible for reviewing a submitted Workflow scenario and the data it contains, and for deciding when to finalize the scenario data, you are the approver of that scenario. As an approver, you must have Approve rights on both the unit(s) and scenario(s) that you are responsible for.

Normally, you would approve a Workflow scenario after a submitter has submitted the scenario and its status has changed from Working to Submitted. When this status change takes place, you will receive an e-mail notifying you of the change and containing a Analyst hyperlink to the last report that the submitter used to modify the scenario data.

You can also approve a scenario that is at Working or Rejected status. If you are satisfied with the data of a scenario that is at any of these statuses and you are ready to finalize it in relation to your organization’s Workflow plan, you approve the scenario, which changes the scenario’s status to Approved. When you approve a Workflow scenario, an e-mail is sent to the explicit submitter(s) of the scenario notifying them of the status change.

If necessary, you can also edit the data of a Workflow scenario before you approve it if that scenario is in Working or Submitted status. Once you approve a Workflow scenario, however, it becomes locked and users can no longer edit its data.

**Note:** Before you can change the status of a scenario from Working to Approved, all of the scenario’s children must be at Approved status.

You can approve a scenario using BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, BusinessObjects Planning Analyst, or Workflow Console.

**Approving in BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro**

BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro give you a visual representation of your business model’s hierarchy and allows you to view reports and view and change the Workflow properties of scenarios.
To approve a Workflow scenario using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:

1. In the Organizer, expand the Information folder until you see the business model in which your Workflow plan is active.
2. Expand the business model until you see the unit that contains the scenario you want to approve, then select the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario and select Workflow Operations, Change Workflow Properties from the menu.
5. On the General page of the Scope of Operation dialog box, select the target unit(s) of your changes. If you are the approver for multiple Workflow scenarios in a hierarchy and you want to approve more than one Workflow scenario at the same time, you can do so by selecting the appropriate check boxes:
   - Current unit – change the Workflow status only in the unit that you have selected
   - All intermediary child units – change the Workflow status in all intermediary units of the unit you have selected
   - All bottom level child units (Leaf units) – change the Workflow status on all bottom-level units under the unit you have selected
6. Click the Workflow tab.
7. On the Workflow page, select the Change Workflow status check box.
8. Select a status from the From list. If you are approving more than one Workflow scenario, the status that you choose here determines which scenarios BusinessObjects Planning applies your changes to. For example, if you choose Working, BusinessObjects Planning will only change the status of the scenarios that are currently at Working status. If you choose Any, BusinessObjects Planning will change the status of all scenarios that you specified in the Scope of Operation dialog box, regardless of their current status.
9. In the To list, select Approved.
10. In the Comments for Notification and History field, type any comments regarding the change in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.
11. If you want e-mail notifications about the change to be sent to users other than the explicit submitter(s) and approver(s) of the affected scenario(s), or you want no e-mail notifications regarding the change to be sent at all, click **Change Email Options**.

12. To turn off all e-mail notifications for the current change you are making, select the **Do not send Workflow email notification** check box.

   OR

To select additional users who you want to receive e-mail notifications for the change you are making, click **To**. In the Additional Email Notification Recipients dialog box, you can choose from a list of users on your BusinessObjects Planning site. When you have finished selecting users, click **OK**.

13. In the Workflow Email Notification Options dialog box, click **OK**.

14. In the Scope of Operation dialog box, click **OK** to confirm your settings and make the specified change in Workflow properties.

## Approving in Analyst

Analyst allows you to quickly approve Workflow scenarios that are part of reports you have open. This option allows you to easily edit, review, and approve data within the context of a report and without having to change applications.

**Note:** Reports are a filtered view of a scenario, and often they do not show you all of the data that a scenario contains. When you approve a scenario within a report, you are not only approving the data that is visible to you in Analyst, but also the data that may not be included in the report.

**To approve a Workflow scenario using BusinessObjects Planning Analyst:**

1. Open a report in BusinessObjects Planning Analyst that uses data from the Workflow scenario you want to approve.

   **Note:** If you have made any changes to the scenario’s data in Analyst, click 📝 (Save) on the main toolbar, select the **check them in** option in the Save dialog box, and click Save before continuing.

2. If necessary, drill down to the unit that contains the scenario you want to approve.

3. Click 📝 (Workflow Action) on the main toolbar.

4. In the Perform Workflow Action dialog box, select the scenario you want to perform the Workflow action on.
Maintaining Workflow Scenarios

Approving a scenario

5. Select the Approve option.

6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

7. Click Next.

8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click Add.

OR

If you do not want to send e-mail notifications, select Do not send workflow notifications.

9. Click Finish.

For more information on navigating in and features of BusinessObjects Planning Analyst, see the BusinessObjects Planning Analyst User Guide.

Approving in the Workflow Console

The Workflow Console provides you with a visual representation of the plan hierarchy that you are working in and of Workflow dates relevant to scenarios you are responsible for approving. It also displays other information related to maintaining Workflow scenarios, such as their due dates, their status, and the last date/time their status was changed.

Note: The Workflow Console will only display the Workflow scenarios that you have View rights on.

If you want to review the submitted data of a Workflow scenario, you can easily open the report that was used for submission from the Console (for more information, see “Launching a report” on page 34).

If you want to quickly approve a scenario in the Workflow Console, you can do so by right-clicking the unit that contains the scenario and selecting Change Status and Approved from the menu. This action will approve the selected scenario and send e-mail notifications using default settings. If you want to approve a scenario and change the e-mail notification settings for the status change you are making, or you want to approve more than one scenario at once, follow the procedure below.

To approve a Workflow scenario using the Workflow Console:

1. Expand the hierarchy until you see the unit that contains the Workflow scenario you want to approve.
Maintaining Workflow Scenarios

Approving a scenario

2. Select the unit and click (Edit Workflow Properties of Scenario) from the toolbar to open the Edit Workflow Properties of Scenario dialog box.

3. If you are the approver for multiple Workflow scenarios in a hierarchy and you want to approve more than one Workflow scenario at the same time, you can do so by selecting the target unit(s) of your status change in the Scope section (choose all that apply):
   • **Current unit** – change the Workflow status only in the unit that you have selected
   • **All intermediary child units** – change the Workflow status in all intermediary units of the unit you have selected
   • **All bottom level child units (leaf units)** – change the Workflow status in all bottom-level units under the unit you have selected
   • **Perform this operation only on units expanded in the workflow tree** – change the Workflow status of the currently expanded units in the Workflow plan hierarchy

4. Select a status from the Change workflow status from list. If you are approving more than one Workflow scenario, the status that you choose determines which scenarios BusinessObjects Planning applies your changes to. For example, if you choose Working, BusinessObjects Planning will only change the status of the scenarios that are currently at Working status. If you choose Any, BusinessObjects Planning will change the status of all scenarios that you specified in the Scope section, regardless of their current status.

5. Select Approved from the to list.

6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

7. Click Next.

8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click Add.

   OR

   If you do not want to send e-mail notifications, select Do not send workflow notifications.

9. Click Finish.
Rejecting a scenario

If you have Approve rights on a Workflow scenario, you also have the power to reject that scenario. You reject a scenario when you are not satisfied with the data it contains after it has been submitted. When you reject a Workflow scenario, its status changes from either Submitted or Approved to Rejected, and an e-mail is sent to the explicit submitter(s) notifying them of the status change. The data contained in rejected scenarios does not roll up and is not included in consolidations.

After the submitter has submitted a Workflow scenario, it is ready for you to review. If there are mistakes in the scenario's data that need to be corrected before the scenario can be considered a concluded part of your organization’s Workflow plan, you can reject it, which allows for further editing by the submitter (submitters cannot edit a Workflow scenario once it has been submitted). A Workflow scenario can go through the rejection/resubmission process until you deem the scenario ready for approval.

You can also reject an approved scenario when changes must be made to its children, which are also at Approved status and need to be made available for editing again. Once you approve a parent scenario, all of its children can no longer be rejected and therefore become closed for editing. It is possible, however, to reopen the child scenarios after rejecting the approved parent scenario. After a parent scenario's status changes to Rejected, the status of all its children can also be changed to Rejected, making the child scenarios available for editing again. Therefore, you may also be required to reject a scenario for this purpose.

Rejecting in BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro

BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro give you a visual representation of your business model’s hierarchy and allows you to view reports and view and change the Workflow properties of scenarios.

To reject a Workflow scenario using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:

1. In the Organizer, expand the Information folder until you see the business model in which your Workflow plan is active.
2. Expand the business model until you see the unit that contains the scenario you want to reject, then select the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.

4. Right-click the Workflow scenario and select Workflow Operations, Change Workflow Properties from the menu.

5. On the General page of the Scope of Operation dialog box, select the target unit(s) of your changes. If you are the approver for multiple Workflow scenarios in a hierarchy and you want to reject more than one Workflow scenario at once, you can do so by selecting the appropriate check boxes:
   • Current unit – change the Workflow status only in the unit that you have selected
   • All intermediary child units – change the Workflow status in all intermediary units of the unit you have selected
   • All bottom level child units (Leaf units) – change the Workflow status on all bottom-level units under the unit you have selected

6. Click the Workflow tab.

7. On the Workflow page, select the Change Workflow status check box.

8. Select a status from the From list. If you are rejecting more than one Workflow scenario at once, the status that you choose here determines which scenarios BusinessObjects Planning applies your changes to. For example, if you choose Submitted, BusinessObjects Planning will only change the status of the scenarios that are currently at Submitted status. If you choose Any, BusinessObjects Planning will change the status of all scenarios that you specified in the Scope of Operation dialog box, regardless of their current status.

9. In the To list, select Rejected.

10. In the Comments for Notification and History field, type any comments regarding the change in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

11. If you want e-mail notifications about the change to be sent to users other than the explicit submitter(s) and approver(s) of the affected scenario(s), or you want no e-mail notifications regarding the change to be sent at all, click Change Email Options.

12. To turn off all e-mail notifications for the current change you are making, select the Do not send Workflow email notification check box.

OR
To select additional users who you want to receive e-mail notifications for the change you are making, click To. In the Additional Email Notification Recipients dialog box, you can choose from a list of users on your BusinessObjects Planning site. When you have finished selecting users, click OK.

13. In the Workflow Email Notification Options dialog box, click OK.

14. In the Scope of Operation dialog box, click OK to confirm your settings and make the specified change in Workflow properties.

**Rejecting in Analyst**

Analyst allows you to quickly reject Workflow scenarios that are part of reports you have open. This option allows you to easily review and reject data within the context of a report and without having to change applications.

*Note:* Reports are a filtered view of a scenario, and often they do not show you all of the data that a scenario contains. When you reject a scenario within a report, you are not only rejecting the data that is visible to you in Analyst, but also the data that may not be included in the report.

► **To reject a Workflow scenario using BusinessObjects Planning Analyst:**

1. Open a report in BusinessObjects Planning Analyst that uses data from the Workflow scenario you want to reject.

   *Note:* If you have made any changes to the scenario’s data in BusinessObjects Planning Analyst, click (Save) on the main toolbar, select the check them in option in the Save dialog box, and click Save before continuing.

2. If necessary, drill down to the unit that contains the scenario you want to reject.

3. Click (Workflow Action) on the main toolbar.

4. In the Perform Workflow Action dialog box, select the scenario you want to perform the Workflow action on.

5. Select the Reject option.

6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

7. Click Next.
8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click Add.

OR

If you do not want to send e-mail notifications, select Do not send workflow notifications.

9. Click Finish.

For more information on navigating in and features of BusinessObjects Planning Analyst, see the BusinessObjects Planning Analyst User Guide.

Rejecting in the Workflow Console

The Workflow Console provides you with a visual representation of the plan hierarchy that you are working in and of Workflow dates relevant to scenarios you are responsible for. It also displays other information related to maintaining Workflow scenarios, such as their due dates, their status, and the last date/time their status was changed.

**Note:** The Workflow Console will only display the Workflow scenarios that you have View rights on.

If you want to review the submitted data of a Workflow scenario, you can easily open the report that was used for submission from the Console (for more information, see “Launching a report” on page 34).

If you want to quickly reject a scenario in the Workflow Console, you can do so by right-clicking the unit that contains the scenario and selecting **Change Status** and **Rejected** from the menu. This action will reject the selected scenario and send e-mail notifications using default settings. If you want to reject a scenario and change the e-mail notification settings for the status change you are making, or you want to reject more than one scenario at once, follow the procedure below.

❖ To reject a Workflow scenario using the Workflow Console:

1. Expand the hierarchy until you see the unit that contains the Workflow scenario you want to reject.

2. Select the unit and click **Edit Workflow Properties of Scenario** from the toolbar to open the Edit Workflow Properties of Scenario dialog box.

3. If you are the approver for multiple Workflow scenarios in a hierarchy and you want to reject more than one Workflow scenario at the same time, you can do so by selecting the target unit(s) of your status change in the Scope section (choose all that apply):
• **Current unit** – change the Workflow status only in the unit that you have selected
• **All intermediary child units** – change the Workflow status in all intermediary units of the unit you have selected
• **All bottom level child units (Leaf units)** – change the Workflow status on all bottom-level units under the unit you have selected
• **Perform this operation only on units expanded in the workflow tree** – change the Workflow status of the currently expanded units in the Workflow plan hierarchy

4. Select a status from the **Change workflow status from** list. If you are rejecting more than one Workflow scenario, the status that you choose here determines which scenarios BusinessObjects Planning applies your changes to. For example, if you choose Submitted, BusinessObjects Planning will only change the status of the scenarios that are currently at Submitted status. If you choose Any, BusinessObjects Planning will change the status of all scenarios that you specified in the Scope section, regardless of their current status.

5. Select **Rejected** from the **to** list.

6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

7. Click **Next**.

8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click **Add**.
   OR
   If you do not want to send e-mail notifications, select **Do not send workflow notifications**.

9. Click **Finish**.

### Changing the Submit by date

If you are an approver of a Workflow scenario, you can change the Submit by date of that scenario if you want to increase the amount of time a submitter has for editing and submitting the scenario for approval. You can only change the Submit by date of a Workflow scenario if its status is Working or Rejected. When you change the Submit by date, an e-mail is sent to the explicit submitter(s) of the scenario informing them of the change.
Maintaining Workflow Scenarios
Changing the Submit by date

Note: The Submit by date that you choose must be before the Approve by date of the scenario.

You can change the Submit by date using BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, or Workflow Console.

For more information on Workflow dates, see “Understanding Workflow” on page 15.

To change the Submit by date using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:

1. In the Organizer, expand the Information folder until you see the business model in which your Workflow plan is active.
2. Expand the business model until you see the unit in which you want to change the Submit by date, then select the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario and select Properties from the menu.
5. Click the Workflow tab.
6. On the Workflow page, click beside the Submit by field to choose a new Submit by date from the calendar. You can also specify a new time. (If you do not specify a time, it will default to 12:00am.)
7. Click OK.
8. In the Comments for Workflow Email Notification and History field, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.
9. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) of the scenario, or you want no e-mail notifications regarding the change to be sent at all, click Change Email Options.
10. To turn off all e-mail notifications for the current change you are making, select the Do not send Workflow email notification check box. OR
To select additional users who you want to receive the e-mail notification for the change you are making, click To. When you have finished selecting users, click OK.
11. Click OK.
12. In the Workflow Notifications dialog box, click OK to confirm your settings and make the change in Submit by date to the scenario.
To change the Submit by date using the Workflow Console:

1. In the Workflow Console, open the Workflow plan that contains the scenario you want to modify.
2. Expand the hierarchy until you see the unit in which you want to change the Submit by date.
3. Select the unit, then click (Edit Workflow Properties of Scenario) on the toolbar to open the Edit Workflow Properties of Scenario dialog box.
4. If you are the approver for multiple Workflow scenarios in a hierarchy and you want to change the Submit by date of more than one Workflow scenario at once, you can do so by selecting the target unit(s) of your Submit by date change in the Scope section (choose all that apply):
   - **Current unit** – change the Submit by date only in the unit that you have selected
   - **All intermediary child units** – change the Submit by date in all intermediary units of the unit you have selected
   - **All bottom level child units (Leaf units)** – change the Submit by date in all bottom-level units under the unit you have selected
   - **Perform this operation only on units expanded in the workflow tree** – change the Submit by date of the currently expanded units in the Workflow plan hierarchy
5. Click beside the **Change submit by date to** field to select a new Submit by date from the calendar.
6. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.
7. Click **Next**.
8. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click **Add**.
   OR
   If you do not want to send e-mail notifications, select **Do not send workflow notifications**.
9. Click **Finish**.
Viewing and printing Workflow history

When the status or the Workflow dates of a scenario change, BusinessObjects Planning logs these changes along with information such as when the changes were made, who made them, what the status or dates changed to, and, through comments entered by the user, why the status or dates were changed. This information is useful if you are trying to track changes made to Workflow scenarios. You can view Workflow history in BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, or the Workflow Console, but you can only print the history from the Workflow Console.

To view Workflow history using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:

1. In the Organizer, expand the Information folder until you are able to see the business model in which your Workflow plan is active.
2. Expand the business model until you are able to see the unit that contains the scenario for which you want to view Workflow history, then click the unit.
3. At the bottom of the right pane of the Organizer, click the Scenarios tab if it is not already selected.
4. Right-click the Workflow scenario of the unit and select Properties from the menu.
5. Click the Workflow tab.
6. On the Workflow page, click History beside the field for which you want to see Workflow history information (for example, Open Date). This action generates a dialog box similar to the following:

   ![History of Open Dates]

7. When you are finished viewing the history, click OK to return to the Workflow page.
To view and print Workflow history using the Workflow Console:

1. In the Workflow Console, open the Workflow plan that contains the scenario for which you want to view Workflow history.
2. Expand the tree hierarchy until you are able to see the unit that contains the scenario for which you want to view Workflow history, then select the unit.
3. On the toolbar, click (History).
4. In the Workflow History dialog box, click the tab that you want to see history for (for example, Approve By). This action generates a dialog box similar to the following:

![Workflow History Dialog Box]

5. To print a history page, click in the dialog box. BusinessObjects Planning will place the information in an HTML file and display it in another browser window. You can print this information or save it as an HTML file on your computer.
6. Click OK in the Workflow History dialog box when you are finished viewing Workflow history.

Sending a report link by e-mail

If you are viewing a report in BusinessObjects Planning Administrator, Analyst Pro, or BusinessObjects Planning Analyst, and you want another BusinessObjects Planning user at your site to review the Workflow data contained in the report, you can send an e-mail that includes a hyperlink to
the report. Assuming the recipients of your e-mail have the appropriate rights, when they click the hyperlink, the report containing the Workflow data will open in Analyst.

**Note:** Sending a report link by e-mail does not change the status of Workflow scenarios that are associated with the report.

**To send a report link using BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:**

1. Open a report in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro that uses data from the Workflow scenario you want reviewed.
2. Right-click anywhere inside the report window and select **Workflow** from the menu.
3. If the report uses data from more than one Workflow scenario, BusinessObjects Planning will prompt you to specify the scenario that you want to send for review. In the Scenario Selection dialog box, select the appropriate scenario and click **OK**.
4. In the Workflow Action dialog box, select the **Send Report Link to** option.
5. In the Workflow Notifications dialog box, type any comments regarding the report or the data it contains. These comments will be sent in the e-mail along with the report hyperlink and will also be logged in the Workflow history.
6. If you want to send the e-mail to users other than the explicit submitter(s) or approver(s) of the Workflow scenario associated with the report, click **Change Email Options**.
7. To select additional users who you want to receive the e-mail, in the Workflow Email Notification Options dialog box, click **To**. When you have finished selecting users, click **OK**.
8. In the Workflow Email Notification Options dialog box, click **OK**.
9. In the Workflow Notifications dialog box, click **OK**.

**To send a report link using BusinessObjects Planning Analyst:**

1. Open a report in BusinessObjects Planning Analyst that uses data from the Workflow scenario you want reviewed.
2. Click **(Workflow Action)** on the main toolbar.
3. In the Perform Workflow Action dialog box, select the scenario you want to perform the Workflow action on.
4. Select the **Send Report Link** option.
5. In the Comments text box, type any comments regarding the changes in Workflow properties that you are making. These comments will be sent with the e-mail notifications and will also be logged in the Workflow history.

6. Click Next.

7. If you want an e-mail notification about this change to be sent to users other than the explicit submitter(s) and approver(s) of the scenario, select the users and click Add.
   
   OR
   
   If you do not want to send e-mail notifications, select Do not send workflow notifications.

8. Click Finish.
Setting Up Workflow Scripts and INI Parameters
Overview

Workflow includes features such as e-mail notification and status reporting that can facilitate your planning and forecasting activities. To enable these features in your organization’s Workflow plans, you must follow the procedures outlined in this section.

Workflow script descriptions

Workflow comes with a set of pre-defined scripts that provide a wide range of features. The following table lists the Workflow scripts and their descriptions. In order to run these scripts, you must follow the procedures outlined in this chapter.

<table>
<thead>
<tr>
<th>Script Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Check and Update Statuses           | This script checks and updates the statuses of the scenarios that are registered with Workflow. By default, the script does the following:  
  • Checks if any scenario with the status of Not Started is approaching its Open Date, and performs the Open action on the scenario if so.  
  • Checks if any scenario with the status of Working or Rejected is approaching its Submit By Date, and performs the RemindSubmit action if so.  
  • Checks if any scenario with status of Working, Rejected, or Pending is approaching its Approve By Date, and performs the RemindApprove action if so.  
  The result of the script execution can be a number of pending notifications.  
  While this script can be executed interactively, it should be scheduled for recurrent execution. |
| Clear Workflow Operation Log        | This script erases the content of the Workflow operation log file. |
| Delete All Pending Notifications    | This script marks all pending Workflow notifications as sent. |
Setting Up Workflow Scripts and INI Parameters

Importing Workflow libraries and scripts

Workflow also comes with a set of script functions that you can use to create custom scripts that automate various Workflow tasks. For a list of these functions and their descriptions and parameters, refer to the BusinessObjects Planning Administrator online help.

### Importing Workflow libraries and scripts

Workflow scripts are dependent on a set of script libraries. Before setting up Workflow, you must import the Workflow scripts and libraries.

- **To import the BusinessObjects Planning Workflow scripts and libraries:**
  1. In BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro, expand the **Scripts** and **Public** folders of any business model.
  2. Right-click the **Libraries** folder and select **Import from File System** from the menu.
    
    **Note:** You must create this folder if it does not exist.
  3. In the Choose a Source file/folder for import dialog box, expand the **Site**, **Workflow**, and **Scripts** folders on the BusinessObjects Planning installation CD.
  4. Select the following libraries:
    - **Workflow.scl**
    - **Send Mail (MAPI).scl**
    - **WorkflowUserRightsImport.scl**

<table>
<thead>
<tr>
<th>Script Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report On Pending Notifications</td>
<td>This script generates a report on all pending Workflow notifications and launches NOTEPAD.EXE to display the report. A notification is pending until an e-mail message is created and sent out, or until the notification is marked as sent or deleted. The report displays the total number of pending notifications, and displays every pending notification as it is stored in the Workflow database, with the subject line, text of the message, and list of the recipients. The report is a text file located in <code>{shared folder}\Logs</code> folder.</td>
</tr>
<tr>
<td>Send Pending Notifications</td>
<td>This script sends out all pending Workflow notifications.</td>
</tr>
<tr>
<td>View Workflow Operation Log</td>
<td>This script launches NOTEPAD.EXE and opens the Workflow operation log. The Workflow operation log is located in <code>{shared folder}\Logs</code> folder and contains records on the other Workflow script activities.</td>
</tr>
</tbody>
</table>
Setting Up Workflow Scripts and INI Parameters

Attaching Workflow libraries to scripts

5. Click Select.
6. Right-click the Scripts and Public folder of any business model and select New and Folder from the menu.
7. Type Workflow and click OK.
8. In the left pane of the Organizer, right-click the Workflow folder and select Import from File System from the menu.
9. In the Choose a Source file/folder for import dialog box, expand the Site, Workflow, and Scripts folders on the BusinessObjects Planning installation CD.
10. Select the following files:
   - Check and Update Statuses.scp
   - Clear Workflow Operation Log.scp
   - Delete All Pending Notifications.scp
   - Report On Pending Notifications.scp
   - Send Pending Notifications.scp
   - View Workflow Operation Log.scp
11. Click Select.

Attaching Workflow libraries to scripts

Each Workflow script must have the Workflow library (Workflow.scl) attached to it. In addition, the Workflow library must have the Send Mail (MAPI) library attached to it.

To attach Workflow libraries to scripts:
1. In BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro, expand the Scripts, Public, and Libraries folders of any business model.
2. Right-click the Workflow script library and select Properties from the menu.
3. In the Properties dialog box, click the Libraries tab.
5. In the Select Script Library dialog box, expand the Scripts, Public, Libraries folder and drag the Send Mail (Mapi) library to the list of libraries in the Libraries dialog box.
6. In the Libraries dialog box, click OK to save the change and close the dialog box.
7. Expand the Scripts, Public, and Workflow folders.
8. Right-click the Check and Update Statuses script and select Properties from the menu.
9. In the Properties dialog box, click the Libraries tab.
11. In the Select Script Library dialog box, expand the Scripts, Public, Libraries folder and drag the Workflow library to the list of libraries in the Libraries dialog box.
12. In the Libraries dialog box, click OK to save the change and close the dialog box.
13. Repeat steps 8-12 for the following scripts:
   • Clear Workflow Operation Log.scp
   • Delete All Pending Notifications.scp
   • Scheduled for Scenarios Approaching Due Date.scp
   • Report On Pending Notifications.scp
   • Send Pending Notifications.scp
   • View Workflow Operation Log.scp

Restricting rights to the Workflow e-mail script

You should restrict access to the Send Pending Notifications e-mail script so that users do not change the settings and disable e-mail notifications.
It is best practice to remove Modify and Control rights for this script for all users other than administrators.
For information on restricting rights to a script, refer to the Administrator’s Guide.

Registering script servers

Script servers execute scripts that have been scheduled by BusinessObjects Planning users. Scripts stored in the Scripts folder within each business model can be scheduled for execution by a script server. Workflow notification scripts depend on a script server to be installed and registered.
For information on installing a script server, refer to the Installation Guide.
For information on registering a script server, refer to the Scheduling Jobs chapter in the Administrator’s Guide.

**Scheduling Workflow scripts for execution**

The Check and Update Statuses and the Send Pending Notifications scripts need to be scheduled for execution so that e-mail notifications will be sent to users. These scripts should be scheduled according to the recommendations in the following table.

<table>
<thead>
<tr>
<th>Script Name</th>
<th>Period of Execution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check and Update Statuses</td>
<td>Once or twice daily. For example, at midnight or at noon and midnight.</td>
</tr>
<tr>
<td>Send Pending Notifications</td>
<td>Depending on the number of Workflow notifications, this script should be run at most every half hour and at least every six hours.</td>
</tr>
</tbody>
</table>

*Note:* Workflow-specific script functions are business model context sensitive. Therefore, Workflow scripts should be scheduled for each business model in which Workflow is enabled.

For information on scheduling scripts for execution, refer to the Scheduling Jobs chapter in the Administrator’s Guide.

**Setting Workflow INI parameters**

Workflow is configured through the [Workflow] section in the shared Planning.ini file. The [Workflow] section contains two types of INI settings:

- Fixed settings—Names do not change and the settings must be manually entered into the file.
- System-generated settings—Names are system-generated and the settings are automatically entered into the file whenever the corresponding Workflow parameter is modified in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro.

When setting up Workflow, you should set the following parameters:

*Note:* The Workflow e-mail settings can be specified in either your local or shared Planning.ini file. Local settings override settings in the shared INI file.
### Fixed settings

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FeatureEnabled</td>
<td>Turns Workflow on or off. 1 = enabled. The default value is 0.</td>
</tr>
<tr>
<td>MailProfile</td>
<td>Specifies the mail profile to use to send Workflow notifications. If this parameter is specified, the MailServer and MailBox parameters are ignored. If you specify this parameter, the script server that generates the Workflow e-mail notifications must have the same mail profile configured on it. Refer to your mail server’s documentation for information on how to create a mail profile. If you are using Microsoft Exchange Server and the script server that generates the Workflow e-mail notifications is running as an e-mail service, you should use the MailServer and MailBox settings instead of this setting.</td>
</tr>
<tr>
<td>MailServer</td>
<td>Specifies the mail server to use to send Workflow notifications. This parameter must be used in conjunction with the MailBox parameter.</td>
</tr>
<tr>
<td>MailBox</td>
<td>Specifies the mailbox to use to send Workflow notifications. This parameter must be used in conjunction with the MailServer parameter.</td>
</tr>
<tr>
<td>SendNotifications</td>
<td>Specifies whether or not to send e-mail notifications. 1 = send e-mail. The default value is 1.</td>
</tr>
<tr>
<td>SendLeaveNotStarted</td>
<td>Specifies whether or not to generate e-mail notifications when scenarios leave Not Started status. 1 = generate e-mail. The default value is 1.</td>
</tr>
<tr>
<td>SendPastDue</td>
<td>Specifies whether or not to generate e-mail notifications when scenarios are past their Approve By date. 1 = generate e-mail. The default value is 1.</td>
</tr>
<tr>
<td>PreviewTemplate</td>
<td>Specifies the relative path to the notification preview sample file. This file is a collection of the notification template keywords used by the Workflow Configuration U.I. to generate a preview of selected notification templates. The value of this setting is the path to the file, starting from a folder that is an immediate child of the BusinessObjects Planning site’s shared folder. Example: PreviewTemplate=Workflow\Templates\Preview.ini The default value is empty.</td>
</tr>
</tbody>
</table>
### Setting Up Workflow Scripts and INI Parameters

#### Setting Workflow INI parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SaveAttributes</td>
<td>Specifies a comma-separated list of attribute names that will be saved with every action or status/date change. The default value is &quot;Comment,ObjectName,ReportUrl&quot;.</td>
</tr>
<tr>
<td>TemplateTokenBeginsWith</td>
<td>Defines the opening delimiter for attribute names used in the notification templates. A delimiter can be any string, meaning it can be more than one character, e.g. &quot;&lt;-&lt;&quot; and &quot;-&gt;&gt;&quot;. For example, the line: Workflow notification: the state of {WorkflowType} {ObjectName} has been changed to {State:New} can be changed to: Workflow notification: the state of &lt;-&lt;WorkflowType&gt;-&lt;ObjectName&gt;- has been changed to &lt;-<a href="">State:New</a>-</td>
</tr>
<tr>
<td>TemplateTokenEndsWith</td>
<td>This parameter is the same as TemplateTokenBeginsWith except that it defines the closing delimiter. The default value is }.</td>
</tr>
</tbody>
</table>
### System-generated settings

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Threshold:{date}** | This setting defines the number of days to use as a threshold for the specified Workflow date. If the current date is within the corresponding threshold, an e-mail notification is generated. If the value of this setting is zero, then e-mail notifications will not be generated. The date component may be one of the following:  
  - OpenDate  
  - SubmitBy  
  - ApproveBy  
  Example: Threshold:OpenDate=30  
  The default value is 0. |
| **Template:{name}** | Specifies the relative path to the corresponding notification template file. Default value: none.  
The setting defines what file will be used as a notification template file for the given template name. Template names can be any of the following:  
  - Default—Default template; this template is used if more than one event occurs at the same time or if the specific template is not defined or found.  
  - StateChanged—This template is used if a change of Workflow status occurs.  
  - Submitted—This template is used if a user performs a Submit action (report-based action).  
  - Rejected—This template is used if a user performs a Reject action (report-based action).  
  - Approved—This template is used if a user performs an Approve action (report-based action).  
  - SendMail—General purpose template for sending e-mail notifications; it is used if the Send Report Link action is performed.  
  - OpenDateChanged—This template is used if any change to the Open date occurs.  
  - SubmitByChanged—This template is used if any change to the Submit by date occurs.  
  - ApproveByChanged—The template is used if any change to the Approve by date occurs.  
  - RemindOpened—This template is used if the system performs an Open action. |
### Setting Workflow INI parameters

#### Parameter | Description
--- | ---
RemindSubmitBy | This template is used if the system performs a RemindSubmit action.
RemindApproveBy | This template is used if the system performs a RemindApprove action.

Examples:
- Template:Default=Workflow\Templates\Default.ntp
- Template:StateChanged=Workflow\Templates\State.ntp
- Template:RemindApproveBy=Workflow\Templates\ApproveBy.ntp
## Index

### A
- Approve by date 17
- Approved status 20
- approvers 18
- approving scenarios 19, 71
- attaching Workflow libraries to scripts 90

### C
- consolidation of Workflow scenarios 19, 20

### D
- disabling Workflow 63
- due dates 17
  - changing Submit by 80
  - setting at the unit level 54

### E
- e-mail notification
  - configuring 43
  - customizing content 46
  - customizing frequency 44
  - listing addresses 43
  - templates 46
- enabling Workflow in scenarios 16, 48

### G
- granting Workflow rights 40, 41, 49, 52

### I
- importing Workflow libraries and scripts 89
- inheritance 39, 41
- INI parameters 92

### L
- Log window 35

### N
- Not Started status 20

### O
- Open date 17, 20

### P
- parent and child relationships in Workflow 19
- printing Workflow history 83

### R
- registering script servers 91
- Rejected status 20
- rejecting scenarios 19, 76
- replicating Workflow properties 57
  - dates 58
  - status 60
- replicating Workflow scenarios 50
- rights 39
  - granting 40, 41, 49
  - granting at the unit level 52
  - implicit and explicit 41
  - inheritance 39, 41
  - on scenario and unit 40
  - Submit and Approve 39
- roles in Workflow 17
- rules 42

### S
- scenarios
  - approving 71
  - enabling Workflow in 48
  - rejecting 76
  - replicating 50
  - specifying identifier and name 48
  - submitting 66
scheduling Workflow scripts for execution 92
scripts
  attaching Workflow libraries to 90
  importing 89
  restricting rights to 91
  scheduling for execution 92
  servers 91
sending a report link 84
setting up a Workflow plan 47
setting Workflow INI parameters 92
statuses 19
Submit by date 17
Submitted status 20, 32
submitters 18
submitting scenarios 19, 66

V
viewing Workflow history 83

W
Workflow
  about 16
  actions 19
  disabling 63
  due dates 17
  enabling in scenarios 16
  process 16
  rights 39
  roles 17
  rules 42
  setting INI parameters 92
  statuses 19
  using across BusinessObjects Planning platforms 21
Workflow administrators 18
Workflow Config folder 44, 46
Workflow Console 23
  Calendar page 30
  launching a report in BusinessObjects Planning Analyst 34
  layout 28
  opening a Workflow plan 28
  printing information 33
  starting 25

Status page 29
tree hierarchy 29
Unit Properties page 31
Workflow history
  printing 83
  viewing 83
Workflow properties
  replicating 57
  setting at the unit level 52
  setting in master scenario 48
WorkflowAdministrators group 38
Working status 20