

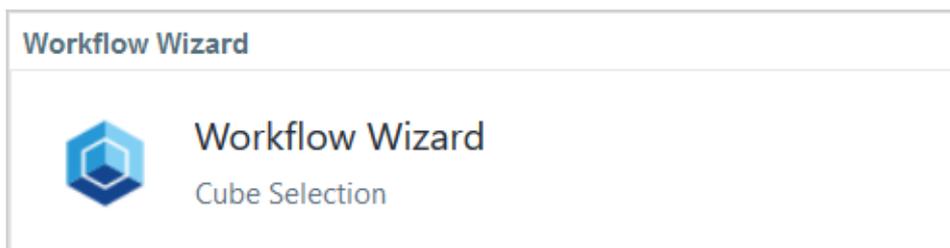
# Workflow Wizard

Return to [Workflow Building Block Overview](#)

The Workflow Wizard guides key users through creating and maintaining workflow tasks. In order to bring workflow functionality to your native work environment, you must have a cube with at least three dimension. The Workflow building block will utilize these as the [Version](#) dimension, the [Time](#) dimension, and the [Step](#) dimension. These dimensions define workflow tasks, for which the key user establishes deadlines and assigns user groups. This involves several steps, as outlined below:

## Report Heading

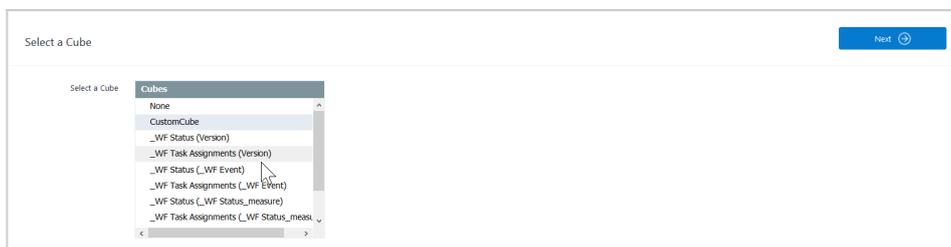
The screenshot below shows the heading area of the Workflow Wizard report:



The logo can be changed in Administration; see [Configuring Design Elements](#) for more on report design. The heading also shows where you are in the workflow process (e.g. the “Cube Selection” stage, as above).

## Cube Selection

The first step is to select a cube to which to add workflow functionality. Alternately you can modify an existing task. Both processes are explained in the upcoming section.



## Task Definition

The next pivotal step takes data from your custom cube and renders it in workflow form. For the complete transfer to occur, the Workflow building block takes three dimensions and creates a task. For now you must select *two* dimensions and provide a *task name*.

The two dimensions in your custom cube become the [Time](#) and [Version](#) dimension in your custom application. Select one element in these dimensions. The workflow task will manage the data on this slice. Both dimensions and their selected elements are two of the many settings that define a workflow task.

Task definition may involve modifying an existing task or creating a new one. [Show existing tasks](#) allows you to modify old tasks,

**Hide existing tasks** allows you to create new ones. The cog button switches between modes. Both modes and their capabilities are shown below.

## Modify an Existing Task

Create Task Name and Define Time and Version Element

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**Hide existing Tasks**

Name of Task

Select Time Dimension   
 Element of the Time dimension

Select Version Dimension   
 Element of the Version dimension

Field	Description	Implementation
	The cog button switches from two modes: "Show existing Tasks" and "Hide existing Tasks". Showing tasks allows you to modify them.	
Name of Task	Chose any existing task to modify.	Element name in the <a href="#">WF_Task</a> dimension
Select Time Dimension	Name of the Time dimension in the cube, e.g. <a href="#">Month</a> .	<a href="#">Time Dimension</a> attribute of the <a href="#">WF_Task</a> dimension
Element of Time Dimension	The element that belongs to the Time dimension, e.g. <a href="#">2020</a> .	<a href="#">Time</a> attribute of the <a href="#">WF_Task</a> dimension
Select Version Dimension	Name of the Version dimension in the cube, e.g. <a href="#">Version</a> .	<a href="#">Version Dimension</a> attribute of the <a href="#">WF_Task</a> dimension
Element of Version Dimension	The element the belongs to the Version dimension, e.g. <a href="#">Budget</a> .	Version attribute of the <a href="#">WF_Task</a> dimension.

## Create a New Task

Create Task Name and Define Time and Version Element

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**Show existing Tasks**

Name of Task

Copy from existing Task

Select Time Dimension   
 Element of the Time dimension

Select Version Dimension   
 Element of the Version dimension

Create new Task

Field	Description	Implementation
	The cog button switches from two modes: "Show existing Tasks" and "Hide existing Tasks." Hiding tasks allows you to create new ones.	
Name of Task	Enter a task name to create a new task.	Element name in the <a href="#">WF_Task</a> dimension
Please define new task Name or Please define a different task name	If the task name field is empty or the entered name conflicts with an existing task an error message appears and the Create Task button is hidden. The error disappears when a unique task name is entered and the field is left.	
Select Time Dimension	Name of the Time dimension in the cube, e.g. <a href="#">Month</a> .	<a href="#">Time Dimension</a> attribute of the <a href="#">WF_Task</a> dimension
Element of Time Dimension	The element that belongs to the Time dimension, e.g. <a href="#">2020</a> .	<a href="#">Time</a> attribute of the <a href="#">WF_Task</a> dimension
Select Version Dimension	Name of the Version dimension in the cube, e.g. <a href="#">Version</a> .	<a href="#">Version Dimension</a> attribute of the <a href="#">WF_Task</a> dimension
Element of Version Dimension	The element the belongs to the Version dimension, e.g. <a href="#">Budget</a> .	<a href="#">Version</a> attribute of the <a href="#">WF_Task</a> dimension

Create new Task (button)

Click this button and you will have just created a new task.

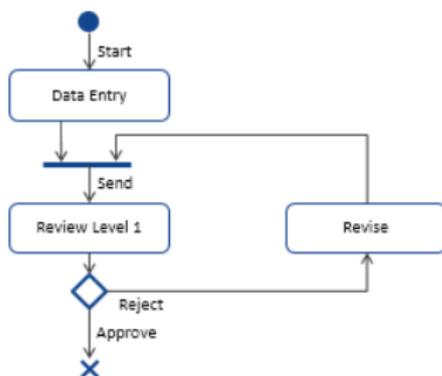
Creates a new element in the `WF_Task` dimension  
Shown when a new, unique name is entered.  
When `Copy From` (existing `Task`) is checked: Runs the `wf003_20_Add_New_Task_From_Template` job in the Workflow Integrator project.  
Else: Runs the `wf003_40_Add_New_Task` job in the Workflow Integrator project.

## Define Step Dimension and Workflow Type

The step dimension is the main mover in the workflow. While the version and time dimension identify the data slice to operate on, the step dimension breaks the task down into steps. You can think of it as the tool that breaks down a large data set into smaller, more manageable packages (the `Region` dimension, for example, breaks down into countries, districts and so on). More importantly, however, the step dimension controls reciprocity of these packages, assigning certain activities to certain user groups, and thereby streamlining the workflow process.

## Define Step Dimension and Workflow Type

Step Dimension	Region
Type of Dimension	Business
Default Read Element of Step Dimension	All Regions
Workflow Type	WF_Approval_Activities



Field	Description	Implementation
Step Dimension (combo box)	Click inside the combo box to select your step dimension.	One dimension of the <a href="#">Cube</a> .
Type of Dimension (combo box)	Displays the dimension type. Dimensions are grouped in certain way based on the type assigned to them.	<a href="#">See article</a> for more information the various dimension types and how they can be assigned to your custom database.
Default Read Element of Step Dimension	The workflow step dimension must have a Default Read Element defined for workflow to function. If this has not yet been defined in the dimension properties, you can click select the read element for your step dimension here for your own convenience.	This field shows the dimension property which is also available in the Modeler. See <a href="#">Default Read Element</a>
Workflow Type (combo box)	Displays workflow type (approval, one level approval, two level approval, or feedback).	Root element in <a href="#">WF_Activity</a> dimension.
Workflow Diagram	Displays the Unified Modeling Language (UML) diagram of the workflow task.	There are several diagrams possible depending on the workflow type selected. The images are stored as <a href="#">Workflow Type-&lt;Workflow Type&gt;.png</a> in the <a href="#">//Models/&lt;Model Name&gt;/Files/Images/</a> folder.

## Define Email Notification

Emails are sent to user groups automatically. Email settings are shared across all workflows having the same workflow type. The subject and body of the notification email can be customized for each activity. The keywords are replaced automatically when emails are sent.

Define Email Notification

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⚙️ Hide available Keywords

TASK_NAME	Name of the task e.g.:
USER_NAME	User Name who proceeded the previous activity as in General Information about User...
USER_EMAIL	E-Mail who proceeded the previous activity as in General Information about User...
STEP_NAME	Name of step dimension e.g.: Cost Center
ACTIVITY_NAME	Name of activity e.g.: Send
WORKFLOW_COMMENT	Comment as entered while proceeding the previous activity
NEXT_ACTIVITY_NAME	Name of next activity e.g.: Review

**E-mail Notification for Start Activity**

Notification Subject	Task TASK_NAME has been started
Notification Body	Dear Jedox User, the task TASK_NAME has been started by user USER_NAME Please log in to Jedox to execute the task step activities  Regards, Jedox Administrator

**E-mail Notification for Send Activity**

Notification Subject	Task TASK_NAME is ready for review
Notification Body	Dear Jedox User, data on task TASK_NAME has been entered by user USER_NAME Please log in to Jedox to execute the task step activities  Regards, Jedox Administrator

**E-mail Notification for Reject Activity**

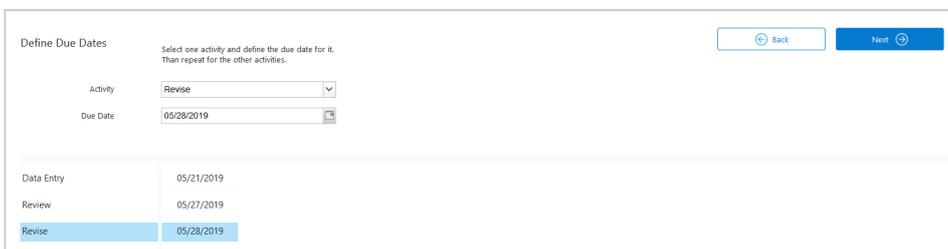
Notification Subject	Task TASK_NAME - Request to revise!
Notification Body	Dear Jedox User, your input on TASK_NAME has been rejected by user USER_NAME Please log in to Jedox to execute the task step activities  Regards, Jedox Administrator

**E-mail Notification for Approve Activity**

Key words are defined at the top of the page, but you may hide them with the cog button. They correspond with the general information about the user (which you can find to [Administration](#) → [Users](#) → [Individual User](#) → [General](#)), as well as the Task Definitions described above.

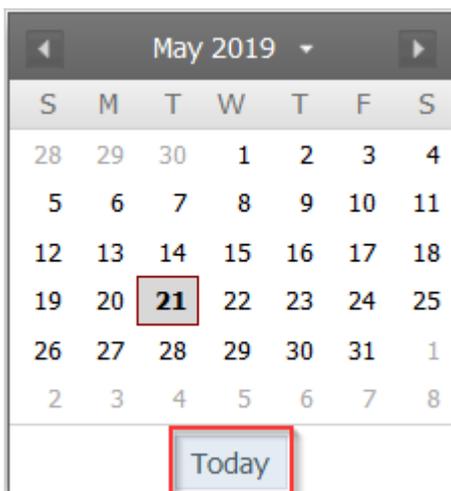
## Define Due Dates

The next step is to set due dates for the workflow activities. Select the activity in the combo box, define due dates for each task activity separately, then click next:



Activity	Due Date
Data Entry	05/21/2019
Review	05/27/2019
Revise	05/28/2019

You can set due dates by clicking the calendar button and selecting a date:



Set the due date to the current date by clicking the **Today** button.

## Step Dimensions Overview and Assignments

Now time for some refinement. You must assign specific elements of the step dimension to the specific user groups. The [Region](#) Dimension, again, as an example:

Assign Workflow Activities to User Groups

[Workflow Assignment Wizard](#)

Step Dimension	Activity		
	Data Entry	Review	Revise
All Regions - All Regions		...	...
AMER - AMER		...	...
APAC - APAC		...	...
EMEA - EMEA		...	...
~ - Not applicable		...	...
Unassigned - Unassigned		...	...

Assign Workflow Activities to User Groups

[Workflow Assignment Wizard](#)

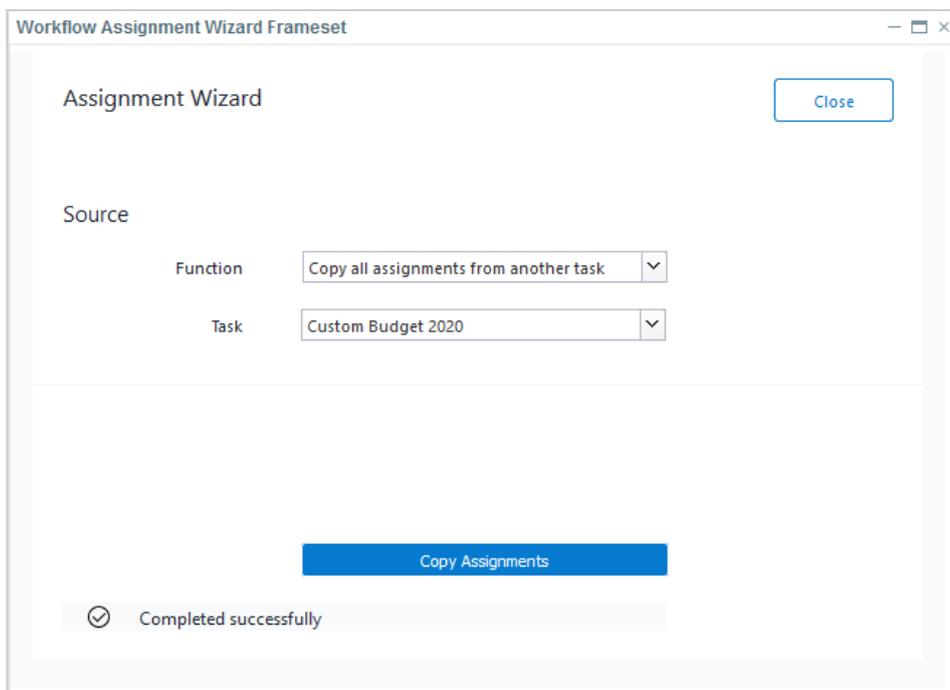
Step Dimension	Activity		
	Data Entry	Review	Revise
All Regions - All Regions		...	...
AMER - AMER		...	...
APAC - APAC		...	...
EMEA - EMEA		...	...
~ - Not applicable		...	...
Unassigned - Unassigned		...	...

The step dimension and its elements are displayed in the first column, the activities on the first row. Click the ellipsis (  ) to assign activities to user groups manually. Alternately, you can copy current or previous assignments by using the Workflow Assignment Wizard.

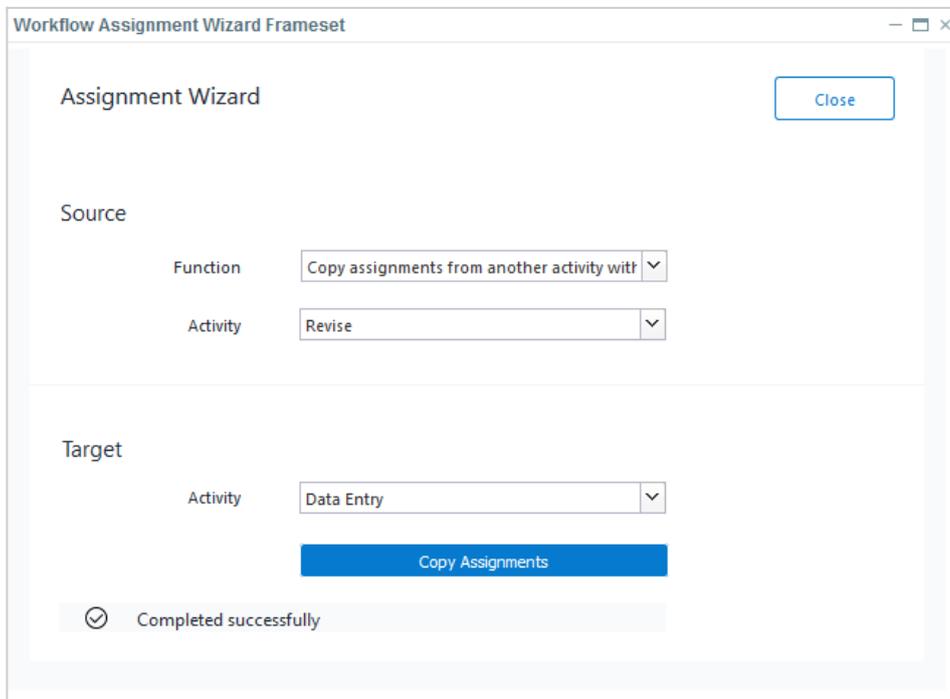
The Workflow Wizard offers two functions. Select your choice in the

**Function** combo box::

1.) Copy all assignments from another task to the current task. This defines the assignments of all activities at once:



2.) Copy the assignments from one activity to another activity *within* the current task, e.g. set the **Revise** task to the same assignment as the **Data Entry** task:



However you select your assignments, they will update in the overview as shown below.

Assign Workflow Activities to User Groups

[Workflow Assignment Wizard](#)

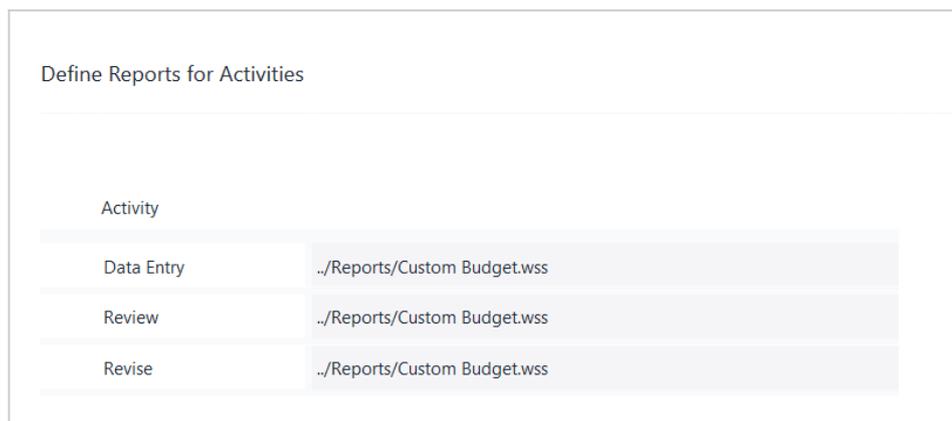
Step Dimension	Activity			
	Data Entry	Review	Revise	
<b>All Regions - All Regions</b>		...	...	...
<b>AMER - AMER</b>	admin	... admin	... admin	...
<b>APAC - APAC</b>		...	...	...
AF - Afghanistan	admin,controlling	... admin,board	... admin,controlling	...
AM - Armenia	admin,controlling	... admin,board	... admin,board	...
AQ - Antarctica	admin,controlling	... admin,controlling	... admin,controlling	...
AS - American Samoa	admin,controlling	... admin,controlling	... admin,controlling,sales	...
AU - Australia	admin,controlling	... admin,controlling	... admin,board	...

We have expanded the region element **APAC** (Asia-Pacific) into country elements (**AF** - Afghanistan, **AM** - Armenia, etc.). Your custom application may, of course, require more or less specification.

Assignments can be made on any level, not just the base level. You will want to make sure, however, that assignments made on different levels do not overlap ([AF](#) and [APAC](#), for instance). When you are satisfied with your constellation of task assignments, click to the next step.

## Define Reports for Activities

Once you have fine-tuned your assignments, it is time to define the reports used for activities:



Define Reports for Activities	
Activity	
Data Entry	../Reports/Custom Budget.wss
Review	../Reports/Custom Budget.wss
Revise	../Reports/Custom Budget.wss

We have used the [Custom Budget](#) report as an example, but of course you will use your own custom report. A relative hyperlink is an especially efficient shortcut to use, [see article](#).

## Workflow Control

Now the workflow task is ready for implementation; the key user need

only control its process. They do so through the control panel below.

**Control the Workflow Status**

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Select a Task:  ▼

Status of Workflow: **Running**

The available options and visualizations are described below:

Field	Description	Implementation
Select a Task	Select the workflow task to set up a plan for. This is related to the reports where users will enter planning data.	Select elements of dimension <a href="#">WF Task</a> . Additional elements can be added to the dimension to represent other workflow tasks. To ensure that it is working with planning reports define the element name as described in the <a href="#">WF Task Dimension</a> article.
Reset Workflow (button)	Stops workflow process that is underway and clears the status and the history.	Deletes all state and history information from the <a href="#">WF Status (&lt;Workflow Step Dimension&gt;)</a> cube. The properties of the workflow task stored in the <a href="#">WF Task Definition</a> cube and the assignments stored in the <a href="#">WF Task Assignments (&lt;Workflow Step Dimension&gt;)</a> cube will stay intact. The operation is encapsulated by the <a href="#">workflow_reset_task()</a> function in the <a href="#">workflow.php</a> library.
Start Workflow (button)	Starts a workflow process from the beginning or starts a paused or stopped workflow process again.	Sets the <a href="#">State</a> and other measures in the <a href="#">WF Status (&lt;Workflow Step Dimension&gt;)</a> cube. The operation is encapsulated by the <a href="#">workflow_start_task()</a> function in the <a href="#">workflow.php</a> library.
Pause Workflow (button)	Pauses a running workflow task. The paused workflow process activates cell protection in the planning reports. A paused workflow process can be started again with the Start button.	Sets the <a href="#">State</a> and other measures in the <a href="#">WF Status (&lt;Workflow Step Dimension&gt;)</a> cube. The operation is encapsulated by the <a href="#">workflow_suspend_task()</a> function in the <a href="#">workflow.php</a> library.
Stop Workflow (button)	Stops a running or paused workflow task. A stopped workflow task can be started again with the Start button. A stopped workflow process removes any workflow related cell protection and does not allow to proceed in the workflow. Cell functions will work as stated within the cell locking section of the planning report articles.	Sets the <a href="#">State</a> and other measures in the <a href="#">WF Status (&lt;Workflow Step Dimension&gt;)</a> cube. The operation is encapsulated by the <a href="#">workflow_disable_task()</a> function in the <a href="#">workflow.php</a> library.
Status of Workflow	See the status of the workflow process for various activities (e.g. Data Entry, Review, and Revise).	Shows the share of activities on the root step of the workflow step dimension. The shares are read from the <a href="#">Active Rate</a> measure for all user activities and the <a href="#">Finished Rate</a> measure for the final system activity in the <a href="#">WF Status (&lt;Workflow Step Dimension&gt;)</a> cube. These are taken from the <a href="#">WF</a> (Not applicable) element in the <a href="#">Event</a> dimension. The root step of the workflow step dimension is encapsulated by the <a href="#">workflow_root_step()</a> function in the <a href="#">workflow.php</a> library.