Data Submission & Approval Process

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One of the reasons people want to use DevResults is to provide a way to formalize data submission, review, and approval processes--and to guarantee that approved data can be "finalized" and become the data of record moving forward.

We provide an out-of-the-box data submission and approval process. It is enabled by default for all direct entry data and can be enabled for data table data , as well.

Direct Entry Data

Direct entry indicator data is entered once per reporting period, during the reporting period's submission window. It is entered through an Activity Reporting Period. Note the status in the upper right:

When Reporting Periods are created, they are assigned a submission window start and end date. This defines the time range that people can enter direct entry data to the reporting period. They will be prevented from entering data before the submission window is open and after it has closed.

Activities work through several statuses for a reporting period:

Status	Locked?	Triggered by	Who can enter/edit data?
No Data	No	Initial status	When the submission window has not yet opened, data table

Status	Locked?	Triggered by	Who can enter/edit data?
			data may be entered by anyone but only **Owners** can enter direct entry data. Once the submission window is open, anyone with **View & Edit** permission on **Indicator Results** may enter data. Once the submission window is closed, only **Owners** can enter direct entry data.
In Progress	No	Changes automatically from No Data to In Progress as soon as: ■ Any direct entry data has been entered ■ Any data table indicators have been calculated that fall within this Activity Reporting Period	Anyone with **View & Edit** permission on **Indicator Results** (unless the submission window is closed--then, only **Owners**).
Submitted	Yes	Anyone with the **Submit Indicator Results** role can Submit for review.	Once Submitted, data may only be edited by: ■ Users with the **Approve Indicator Results** role ■ Users with the **Owners** role
Returned	No	Anyone with the **Approve Indicator Results** role may Return data. The Activity Reporting Period will remain Returned until someone with the **Submit Indicator Results** role resubmits.	Once Returned, as long as the submission window is open, data may be edited by anyone with **View & Edit** permission on **Indicator Results**. If the submission windows is closed, only users with **Approve Indicator Results** role or **Owners** may edit.
Approved	Yes	Anyone with the **Approve Indicator Results** role may Approve data. (Approvers may also Undo Approval and then Return data.)	Once Approved, only **Owners** may edit data.

Users with appropriate permissions can Submit, Return, and Approve data using the dropdown in the upper right of any Activity Reporting Period page:

Data Table Data

As noted above, by default, data table data is *not* governed by this submission, approval, and locking process. Under the default settings, data table rows will remain editable always by any user with the **View & Edit** permission on **Indicator Results**.

With Data Table Row Locking enabled , however, the data submission and review process mimics that for direct entry data. When users try to create new data table rows, edit existing rows, or delete existing rows, the system will check to see if there are indicators assigned to that table. If there are, it will check the Activity Reporting Period that this row's data contributes to. If the row falls within an Activity Reporting Period with any type of locked status (submission window closed, data Submitted or Approved), it will prevent the user from completing the insert, edit, or delete.

This prevents users from accidentally overwriting years' worth of data with only the most recent quarter's, for example.

Here's an overview of how this impacts data table data through the submission and approval process:

Status	Locked?	Triggered by	Who can edit data table rows?
No Data	No	Initial status	Anyone with **View & Edit** permission on **Indicator Results** may enter new data table rows that fall within a future or open Reporting Period. Once the submission window is closed, anyone with **Approve Indicator Results** role or **Owners** role may edit rows.

Status	Locked?	Triggered by	Who can edit data table rows?
In Progress	No	Changes automatically from No Data to In Progress as soon as: ■ Any direct entry data has been entered ■ Any data table indicators have been calculated that fall within this Activity Reporting Period	Anyone with **View & Edit** permission on **Indicator Results** (unless the submission window is closed--then, only users with **Approve Indicator Results** role or **Owners**).
Submitted	Yes	Anyone with the **Submit Indicator Results** role can Submit for review.	Once Submitted, rows may only be edited by: ■ Users with the **Approve Indicator Results** role ■ Users with the **Owners** role
Returned	No	Anyone with the **Approve Indicator Results** role may Return data. The Activity Reporting Period will remain Returned until someone with the **Submit Indicator Results** role resubmits.	Once Returned, as long as the submission window is open, rows may be edited by anyone with **View & Edit** permission on **Indicator Results**. If the submission windows is closed, only users with **Approve Indicator Results** role or **Owners** may edit.
Approved	Yes	Anyone with the **Approve Indicator Results** role may Approve data. (Approvers may also Undo Approval and then Return data.)	Once Approved, only **Owners** may edit data.

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