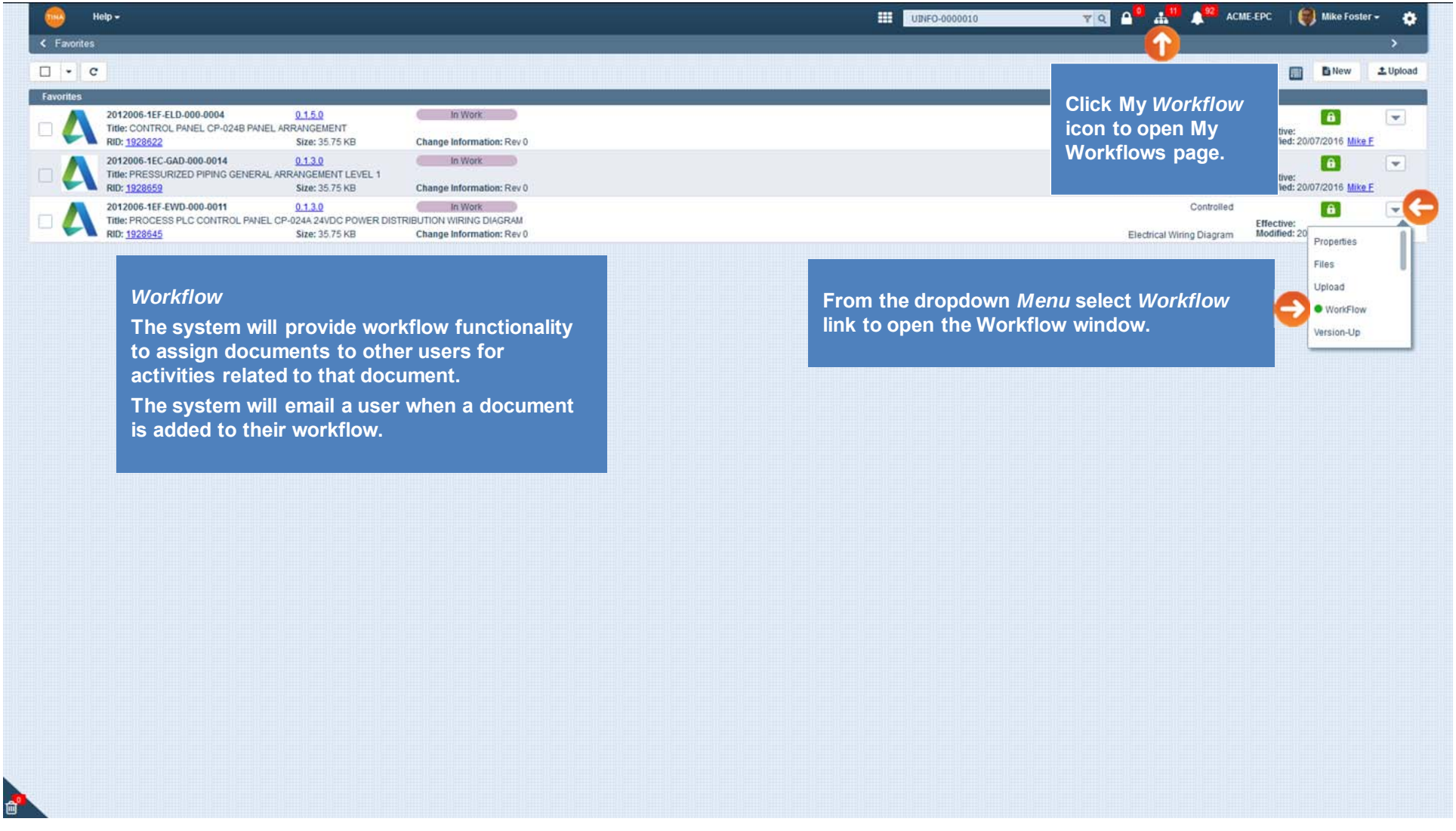
Section 10
Workflow

Navigation to the Workflow
Workflow window Help
Save Workflow as Template
Create Workflow from Template
Creating Workflow Steps
Add Instruction
Escalation
Initiate Workflow Process
Pause Workflow
Bulk Edit Workflow Steps
Edit or Delete Workflow Template



Click My *Workflow* icon to open My Workflows page.

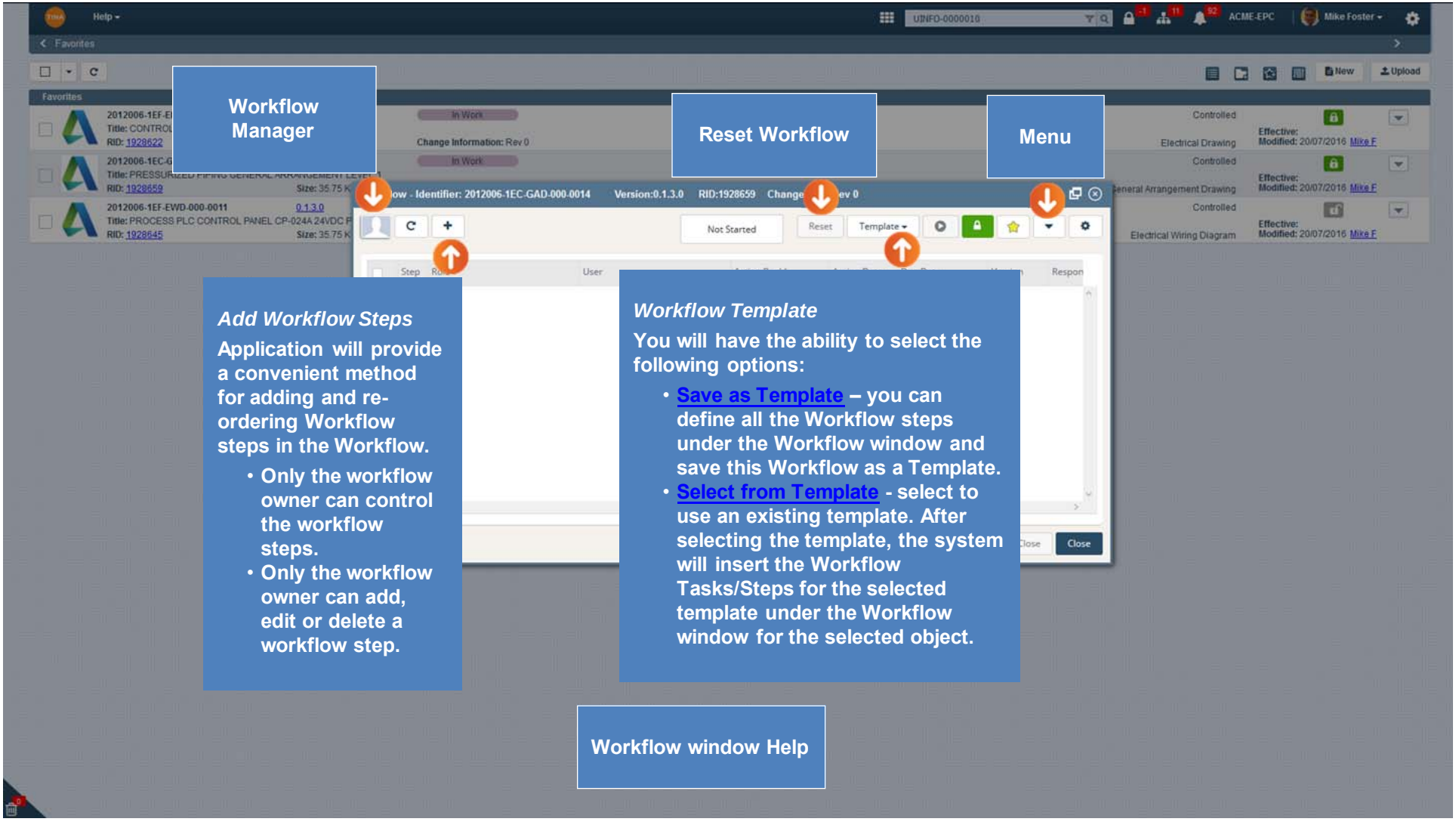
From the dropdown *Menu* select *Workflow* link to open the Workflow window.

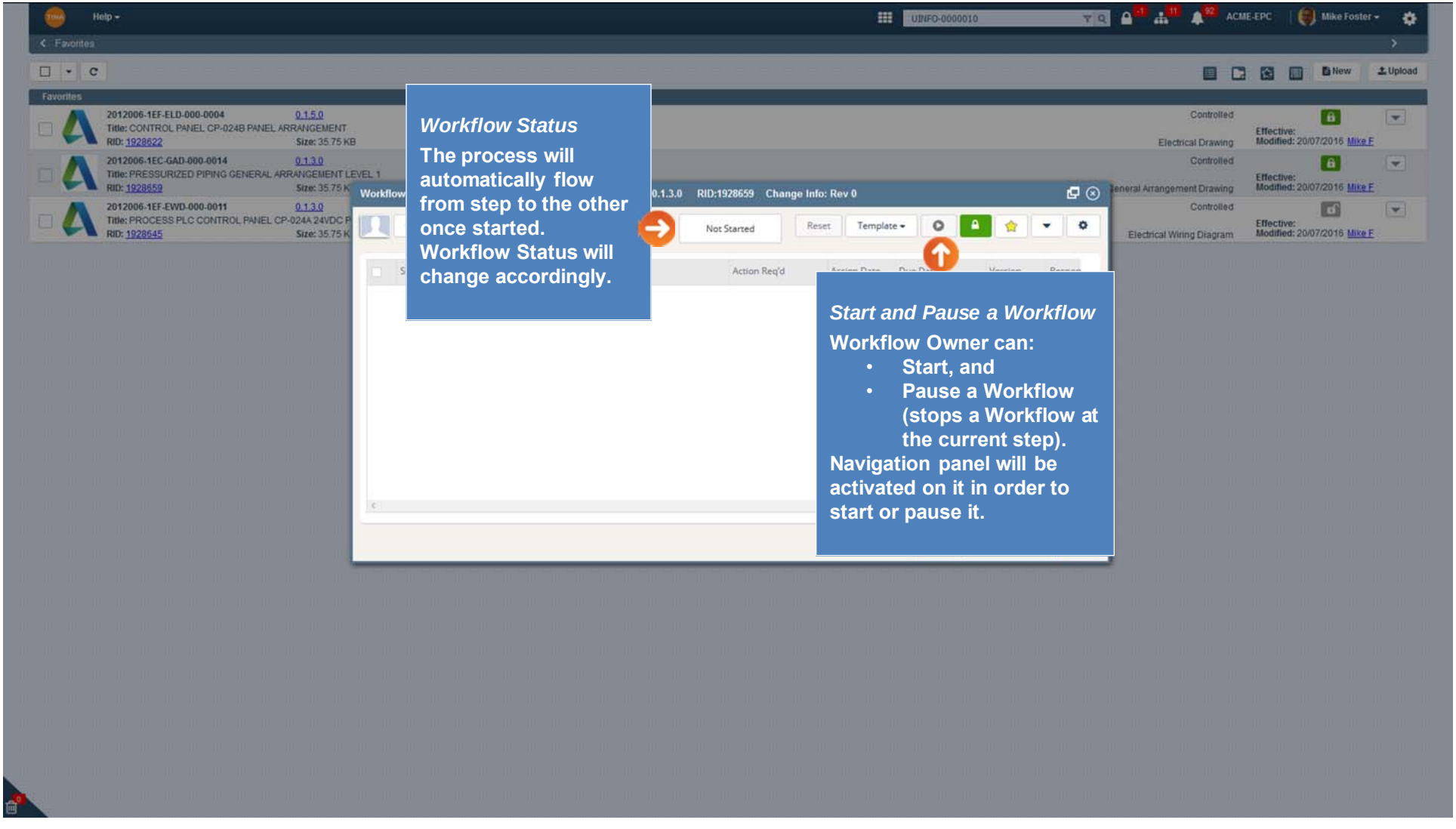
Workflow

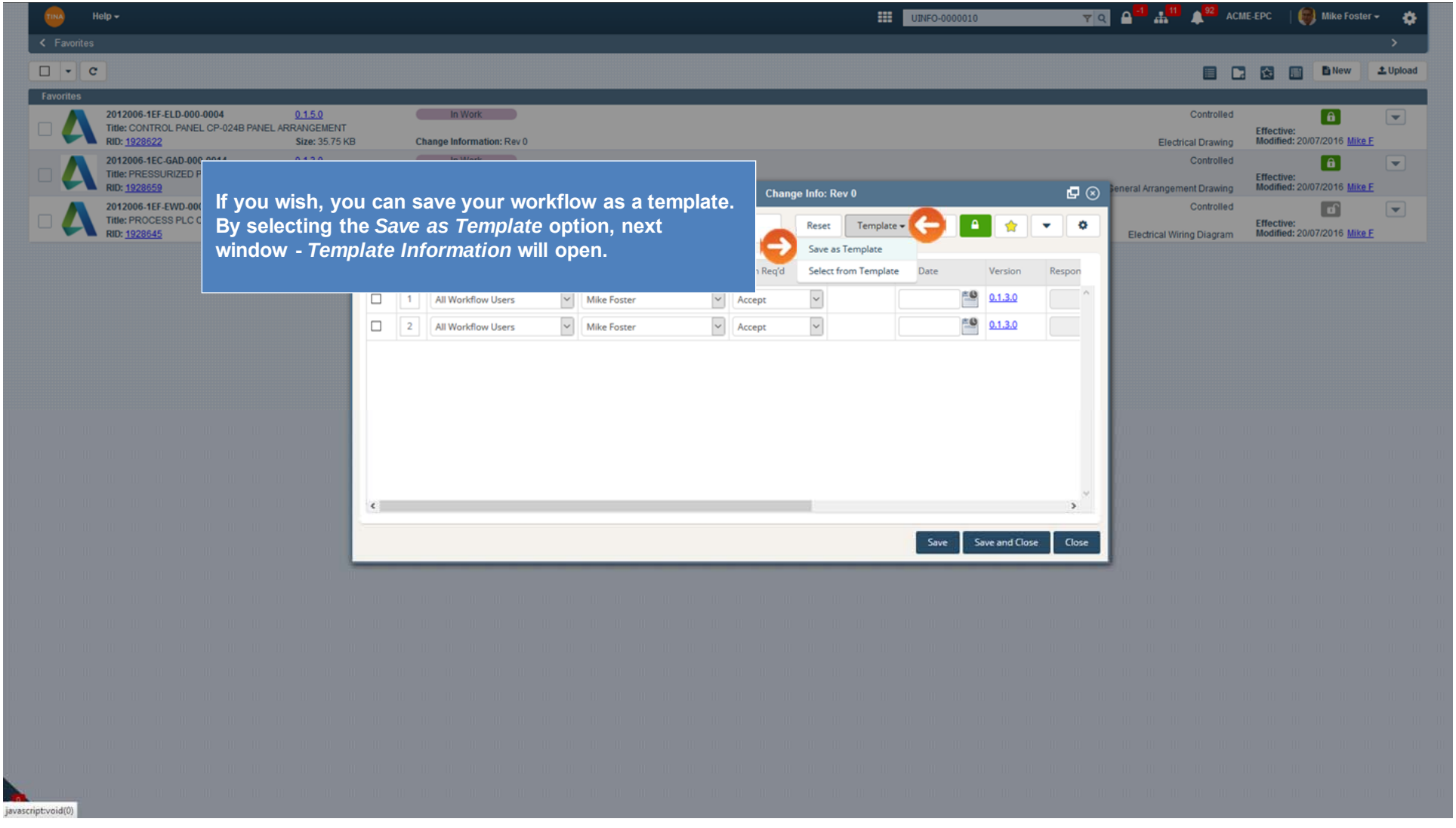
The system will provide workflow functionality to assign documents to other users for activities related to that document.

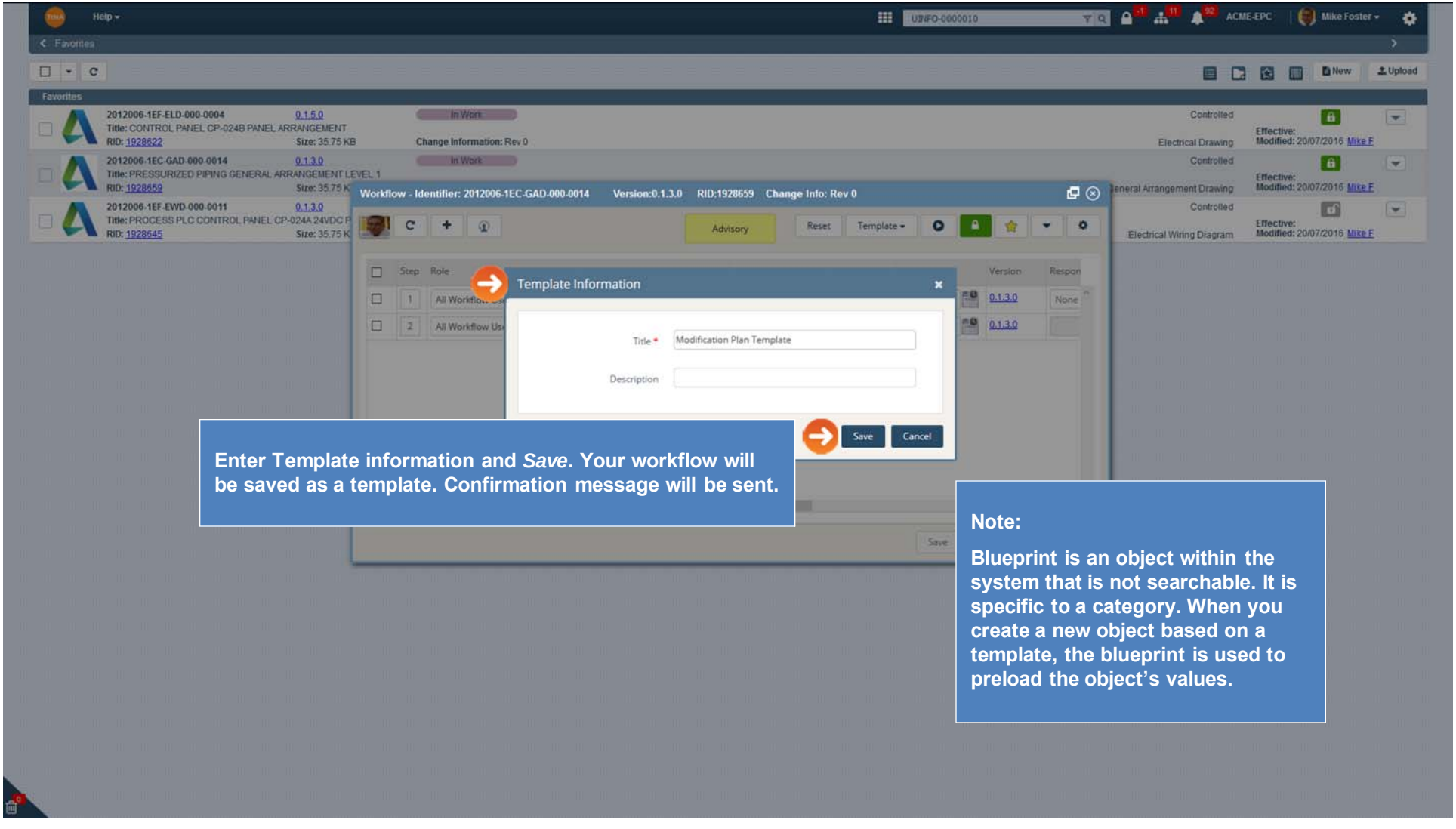
The system will email a user when a document is added to their workflow.

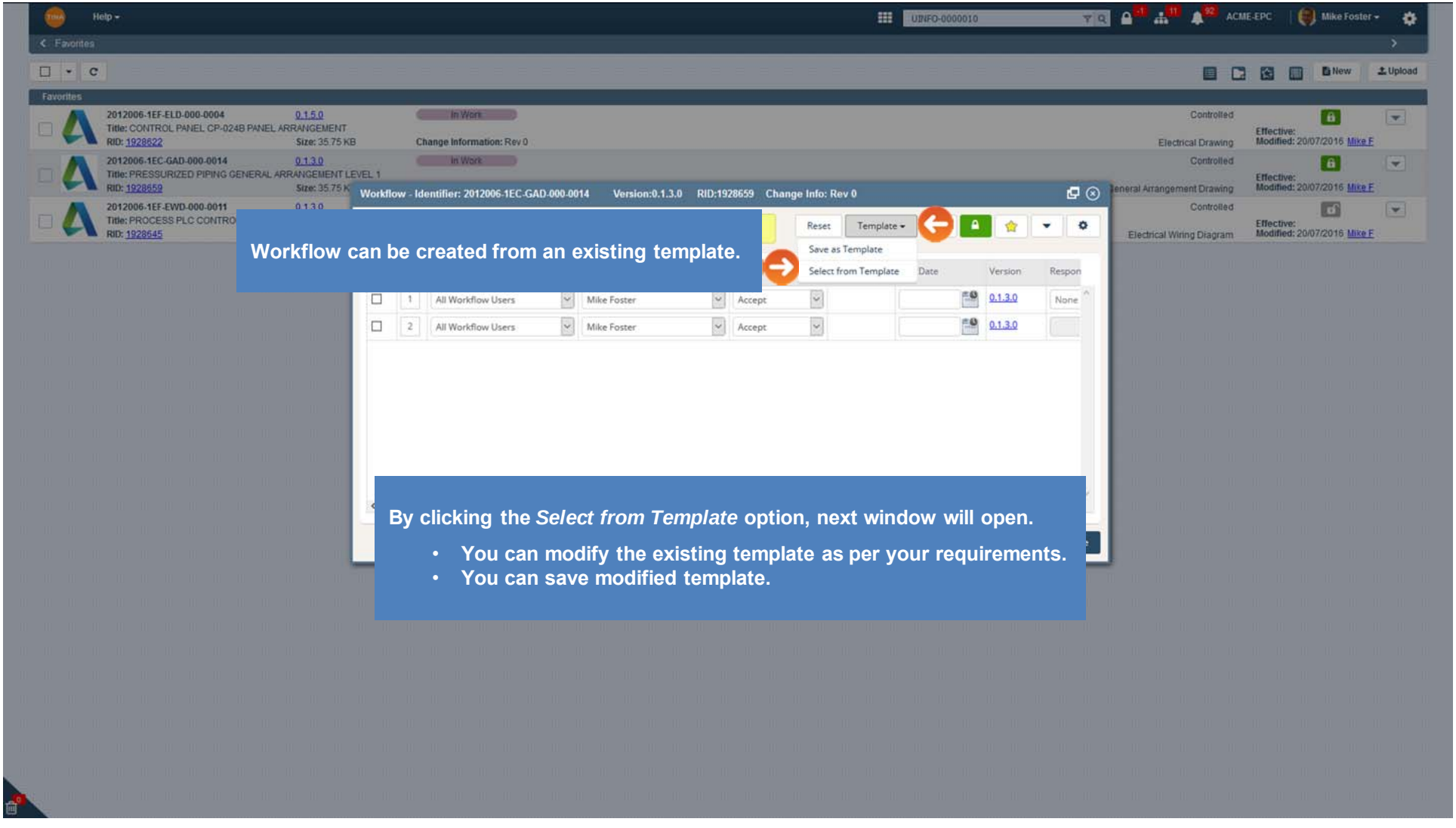
All users with the *Change WFL Manager* permission will see an additional button (*Change workflow manager)* on the Workflow window.
You can set yourself as Workflow Manager by clicking the *Make Me* button or give the Workflow Manager to anyone else by searching/selecting the user). Notification will be sent to the users.
Note: You don't have to be an object owner.
You will see the Workflow Manager at the top of the Workflow. Tool-tip will display WF Manager name.
WF Manager : Steven Gentles
Change Workflow Manager
Make Me
Mike Foster
Workflow window will open.
(See Workflow window Help slide)

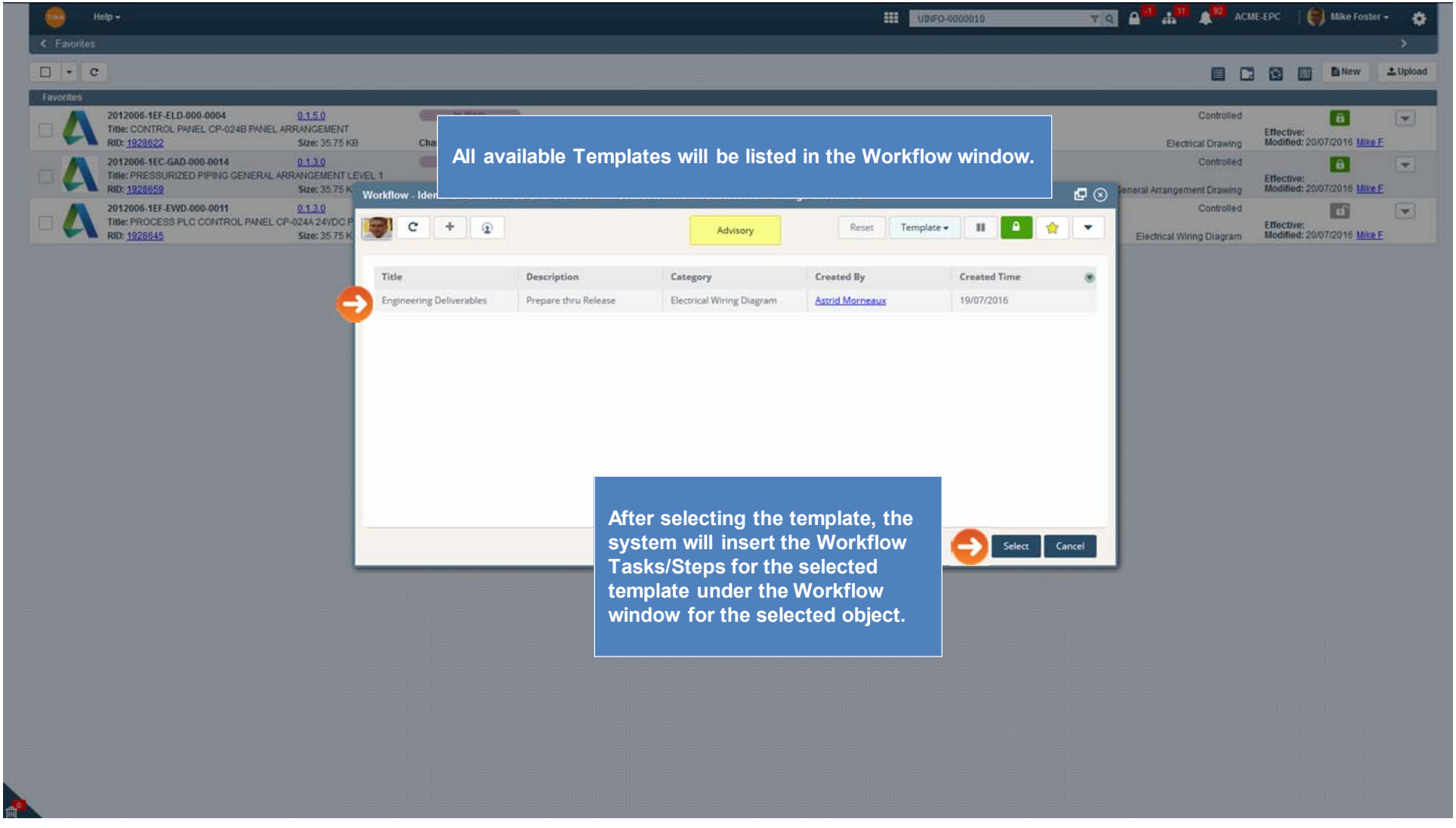

Workflow Manager
Reset Workflow
Menu
Add Workflow Steps
Application will provide a convenient method for adding and re-ordering Workflow steps in the Workflow.
• Only the workflow owner can control the workflow steps.
• Only the workflow owner can add, edit or delete a workflow step.
Workflow Template
You will have the ability to select the following options:
• Save as Template – you can define all the Workflow steps under the Workflow window and save this Workflow as a Template.
• Select from Template - select to use an existing template. After selecting the template, the system will insert the Workflow Tasks/Steps for the selected template under the Workflow window for the selected object.
Workflow window Help

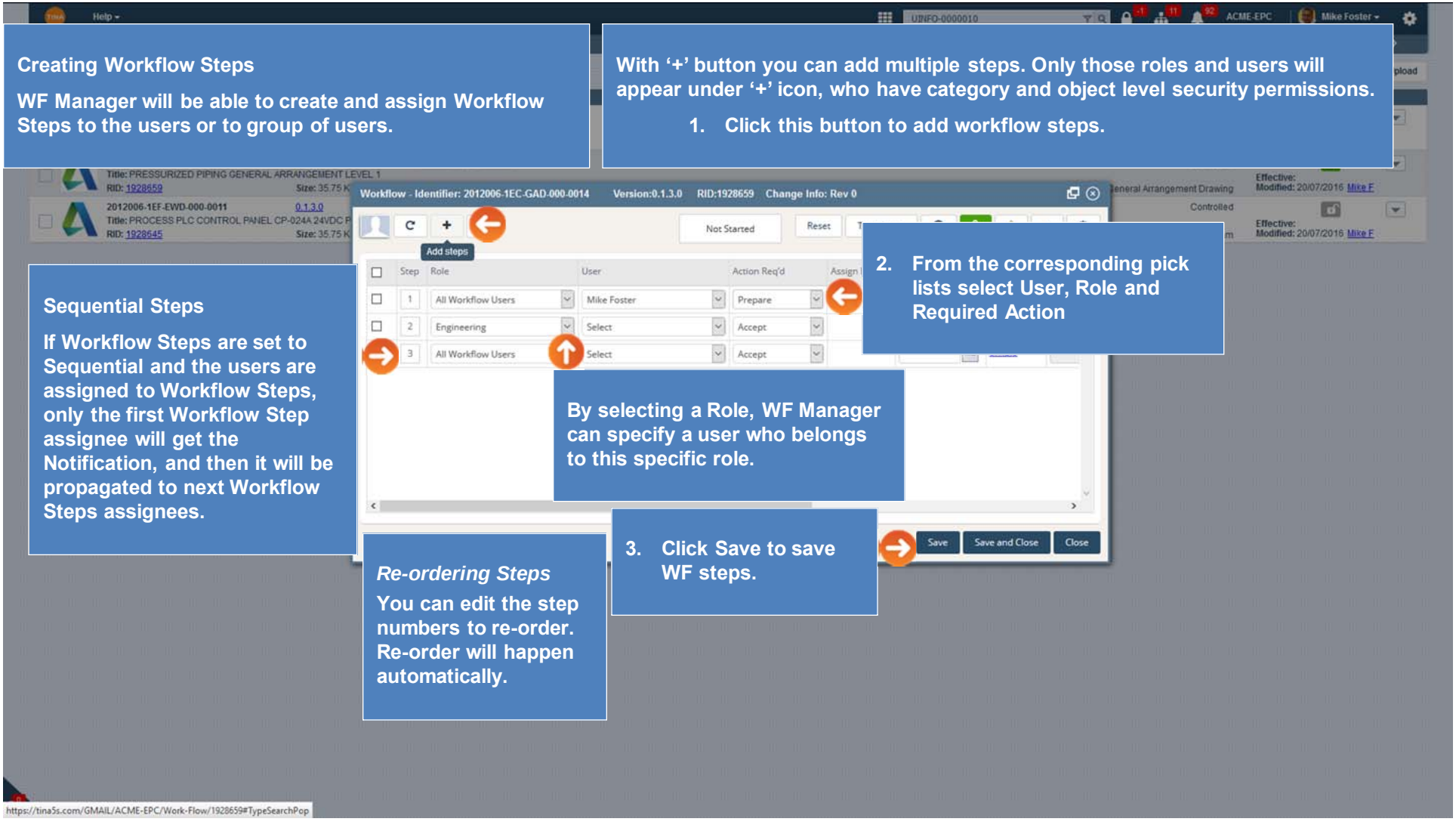

Help
UINFO-0000010
ACME-EPC
Mike Foster
Favorites
New
Upload
2012006-1EF-ELD-000-0004
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 1928622
Size: 35.75 KB
Controlled
Electrical Drawing
Effective:
Modified: 20/07/2016 Mike F
2012006-1EC-GAD-000-0014
Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1
RID: 1928659
Controlled
Effective:
Modified: 20/07/2016 Mike F
2012006-1EF-EWD-000-0011
Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC
RID: 1928645
Controlled
Electrical Wiring Diagram
Effective:
Modified: 20/07/2016 Mike F
Workflow
RID:1928659
Change Info: Rev 0
Not Started
Reset
Template
Action Req'd
Workflow Status
The process will automatically flow from step to the other once started.
Workflow Status will change accordingly.
Start and Pause a Workflow
Workflow Owner can:
Start, and
Pause a Workflow (stops a Workflow at the current step).
Navigation panel will be activated on it in order to start or pause it.


If you wish, you can save your workflow as a template. By selecting the *Save as Template* option, next window - *Template Information* will open.
Change Info: Rev 0
Reset
Template
Save as Template
Select from Template
Save
Save and Close
Close


Help
UINFO-0000010
ACME-EPC
Mike Foster
Favorites
New
Upload
2012006-1EF-ELD-000-0004
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 1928622
Size: 35.75 KB
Change Information: Rev 0
In Work
Controlled
Electrical Drawing
Effective:
Modified: 20/07/2016 Mike F
2012006-1EC-GAD-000-0014
Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1
RID: 1928659
In Work
Controlled
Effective:
Modified: 20/07/2016 Mike F
2012006-1EF-EWD-000-0011
Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P
RID: 1928645
Controlled
Electrical Wiring Diagram
Effective:
Modified: 20/07/2016 Mike F
Workflow - Identifier: 2012006-1EC-GAD-000-0014 Version:0.1.3.0 RID:1928659 Change Info: Rev 0
Advisory
Reset
Template
Step
Role
Version
Respon
Template Information
Title *
Modification Plan Template
Description
Save
Cancel
None
Enter Template information and Save. Your workflow will be saved as a template. Confirmation message will be sent.
Note:
Blueprint is an object within the system that is not searchable. It is specific to a category. When you create a new object based on a template, the blueprint is used to preload the object's values.


Help
UINFO-0000010
ACME-EPC
Mike Foster
Favorites
New
Upload
2012006-1EF-ELD-000-0004
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 1928622
Size: 35.75 KB
Change Information: Rev 0
In Work
Controlled
Electrical Drawing
Effective:
Modified: 20/07/2016 Mike F
2012006-1EC-GAD-000-0014
Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1
RID: 1928659
In Work
Controlled
General Arrangement Drawing
2012006-1EF-EWD-000-0011
Title: PROCESS PLC CONTRO
RID: 1928645
Controlled
Electrical Wiring Diagram
Workflow - Identifier: 2012006-1EC-GAD-000-0014 Version:0.1.3.0 RID:1928659 Change Info: Rev 0
Reset
Template
Save as Template
Select from Template
Date
Version
All Workflow Users
Mike Foster
Accept
0.1.3.0
None
Workflow can be created from an existing template.
By clicking the Select from Template option, next window will open.
You can modify the existing template as per your requirements.
You can save modified template.


All available Templates will be listed in the Workflow window.
Workflow - Iden
Advisory
Reset
Template
Title
Description
Category
Created By
Created Time
Engineering Deliverables
Prepare thru Release
Electrical Wiring Diagram
Astrid Morneaux
19/07/2016
Select
Cancel
After selecting the template, the system will insert the Workflow Tasks/Steps for the selected template under the Workflow window for the selected object.

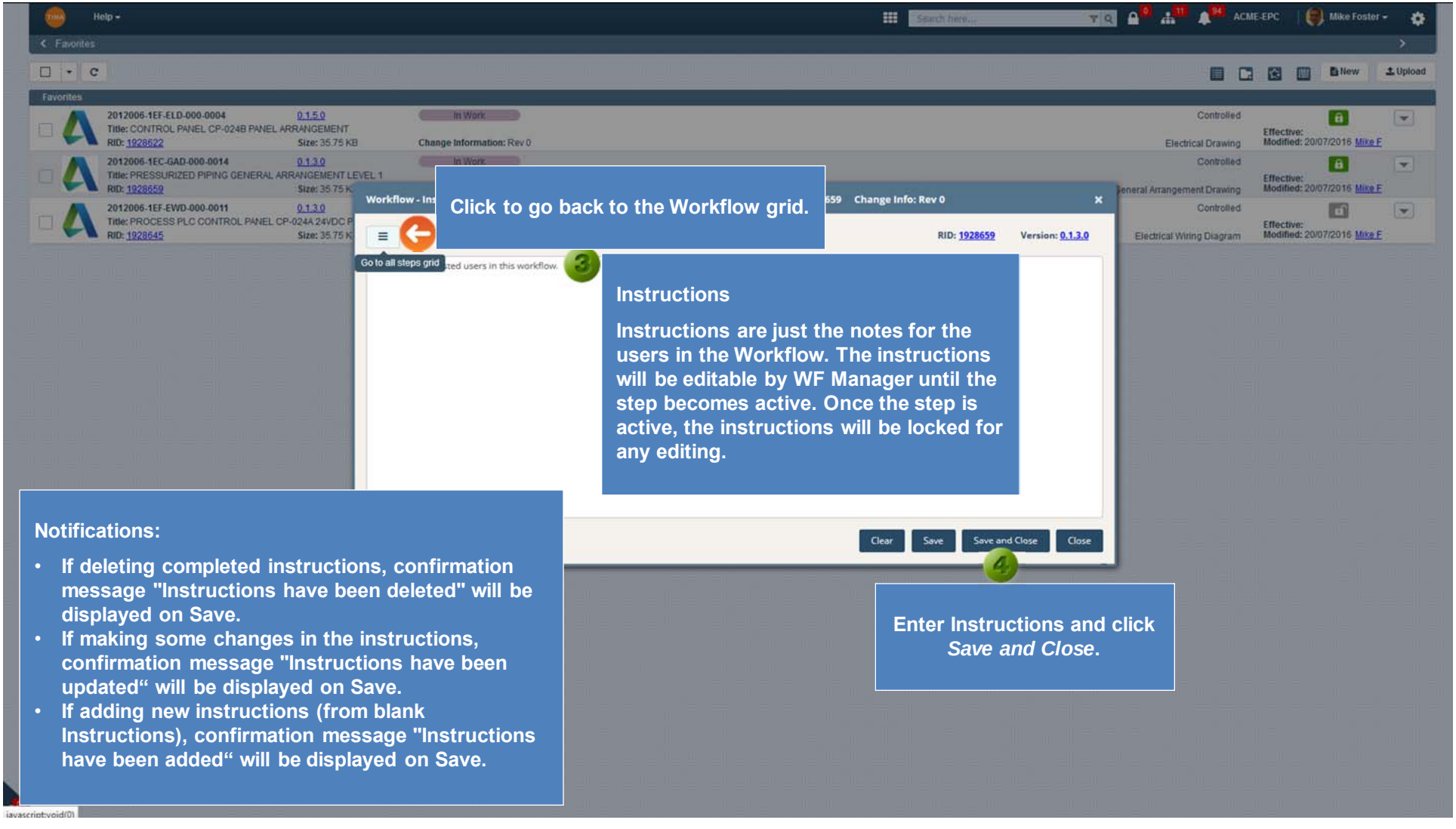

Creating Workflow Steps
WF Manager will be able to create and assign Workflow Steps to the users or to group of users.
With '+' button you can add multiple steps. Only those roles and users will appear under '+' icon, who have category and object level security permissions.
1. Click this button to add workflow steps.
Workflow - Identifier: 2012006-1EC-GAD-000-0014 Version:0.1.3.0 RID:1928659 Change Info: Rev 0
Add steps
Not Started
Reset
Step
Role
User
Action Req'd
1 All Workflow Users Mike Foster Prepare
2 Engineering Select Accept
3 All Workflow Users Select Accept
2. From the corresponding pick lists select User, Role and Required Action
Sequential Steps
If Workflow Steps are set to Sequential and the users are assigned to Workflow Steps, only the first Workflow Step assignee will get the Notification, and then it will be propagated to next Workflow Steps assignees.
By selecting a Role, WF Manager can specify a user who belongs to this specific role.
Re-ordering Steps
You can edit the step numbers to re-order. Re-order will happen automatically.
3. Click Save to save WF steps.
Save
Save and Close
Close

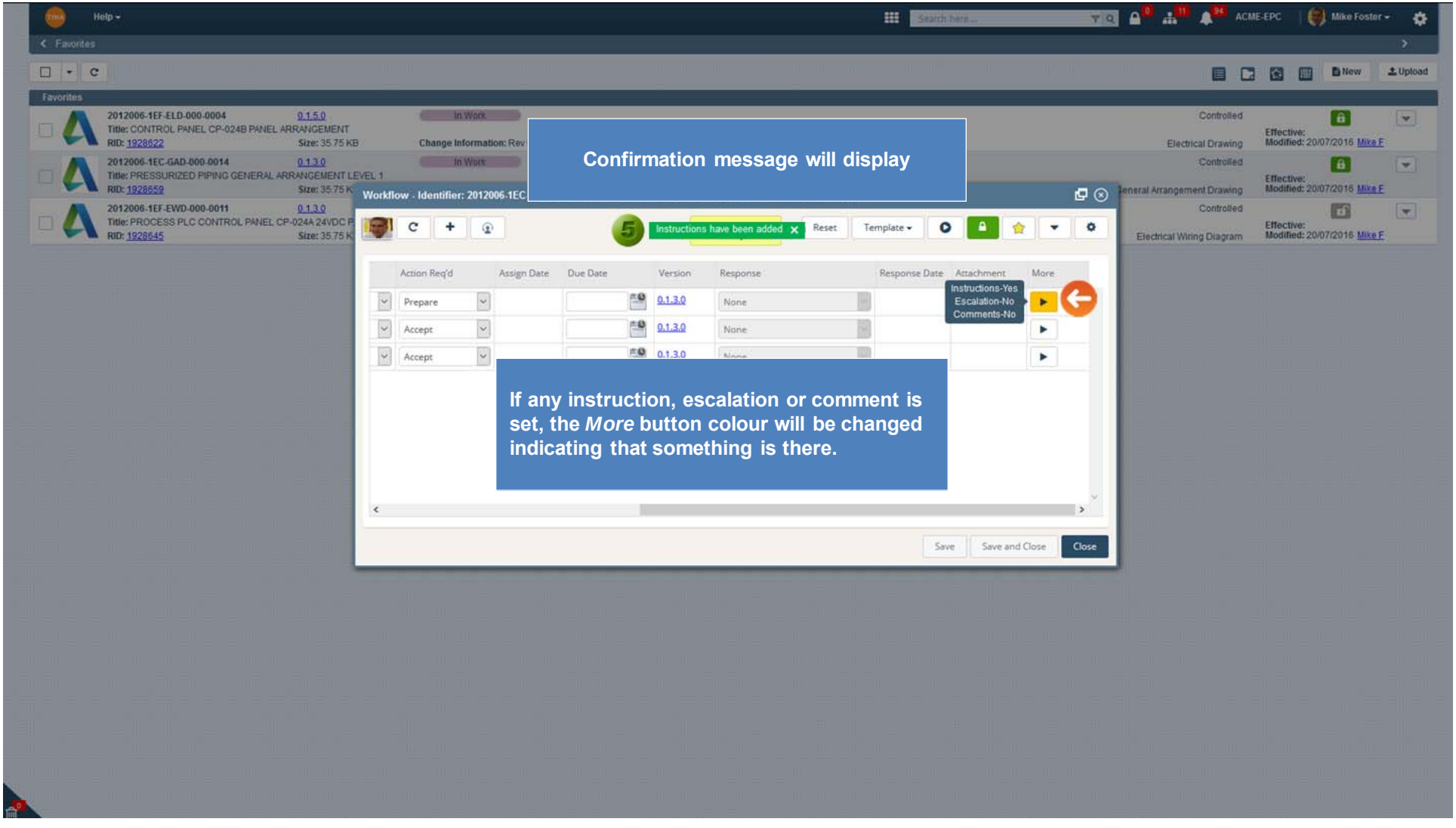
You can *Lock/Unlock* object, Add to Favorites from the Workflow window or have access to the *Menu*.
IM50
Reset Workflow steps Icon will reset WF steps to default.
Change Info: Rev 0
Reset
Template
Menu
Action Req'd
Assign Date
Due Date
Attachment
More
Prepare
Accept
Accept
Step Details
Instructions
Escalation
Comments
To add WF instruction, select *Instructions* from the *More* dropdown menu.
Escalation option will be enabled only if you select a *Due Date* value.
If WF assignee adds comments, then *Comments* option will be enabled.
Save
Save and Close
Close

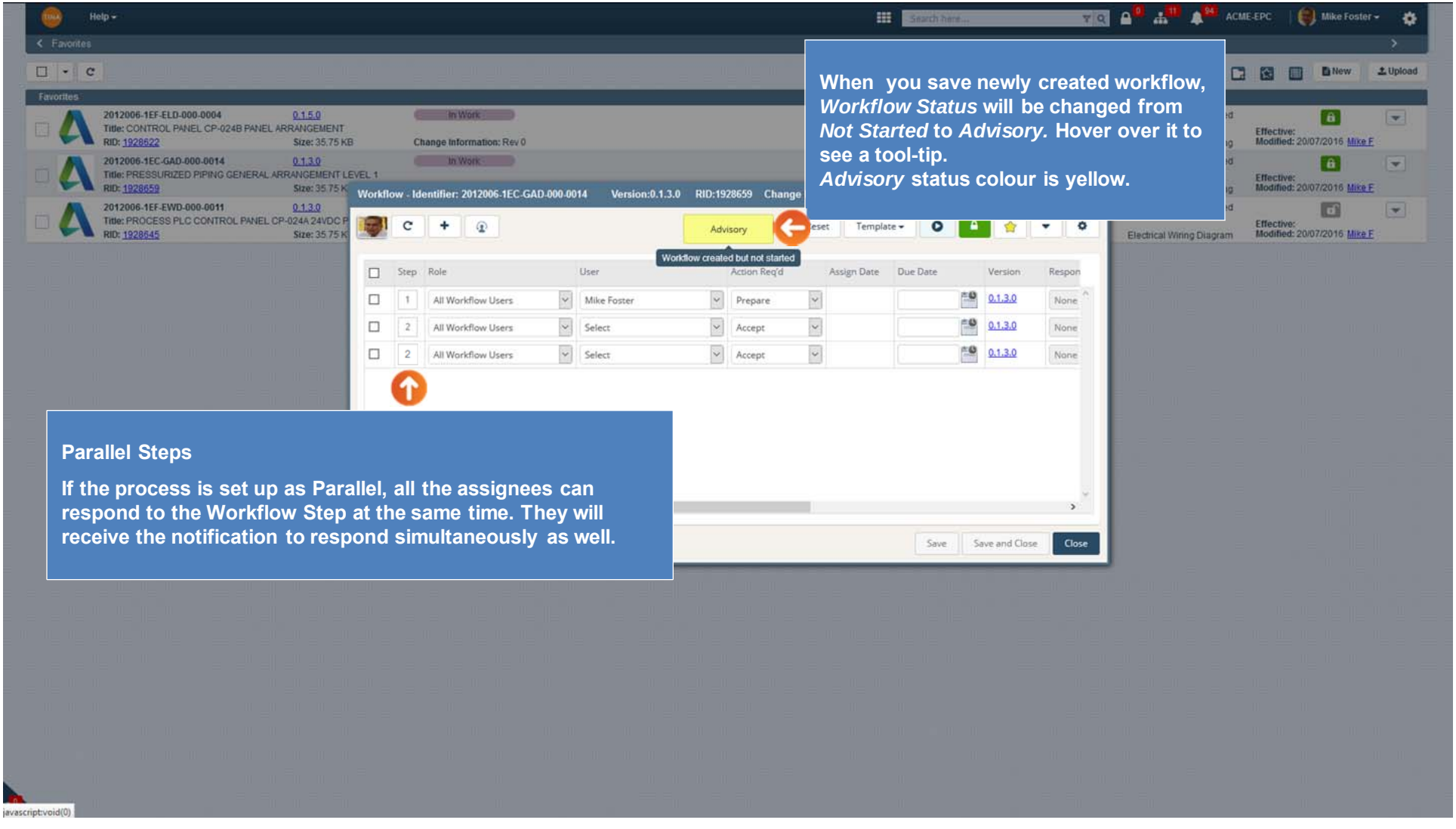
Slide 11

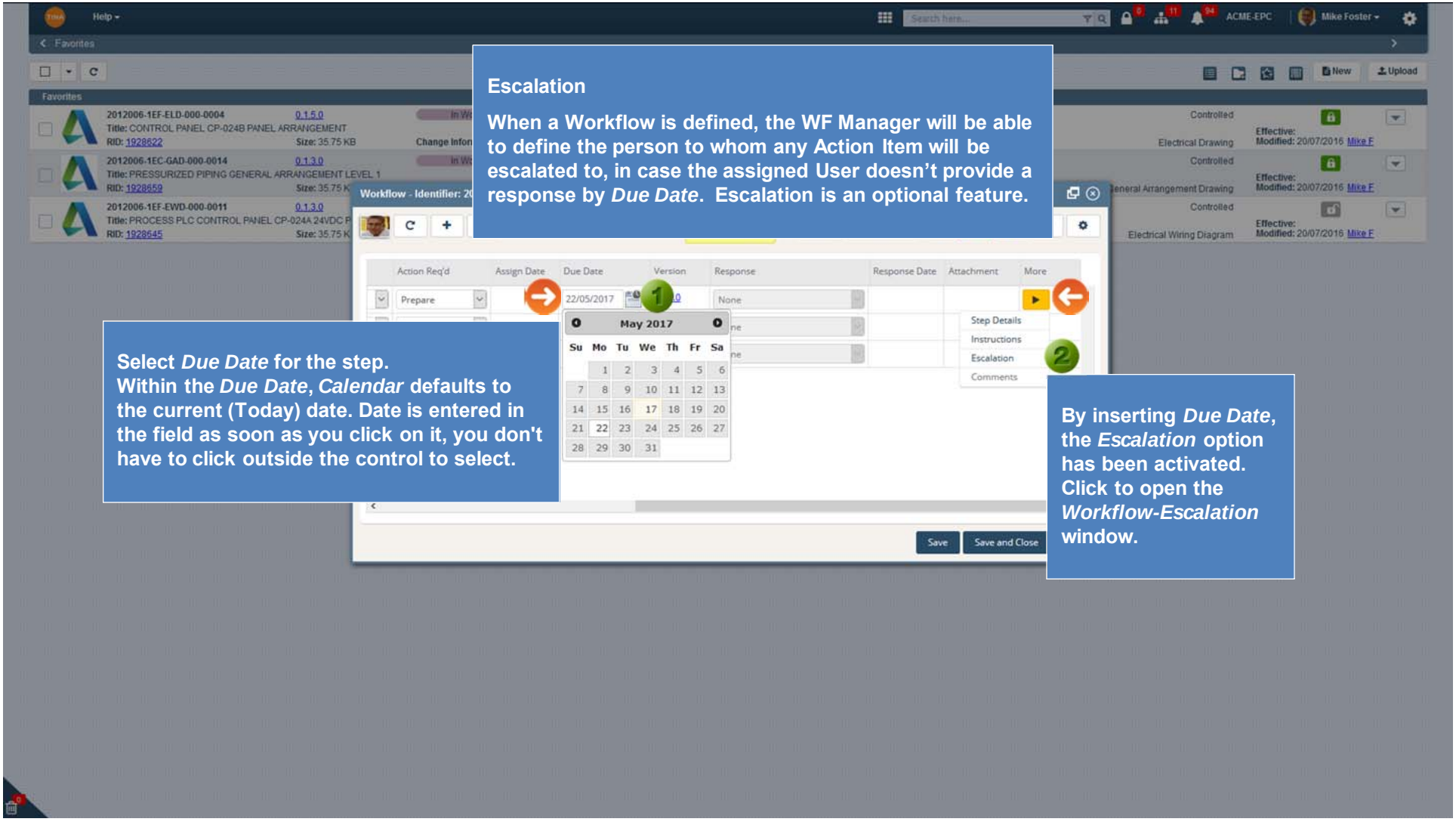
IM50 no shortform **Updated

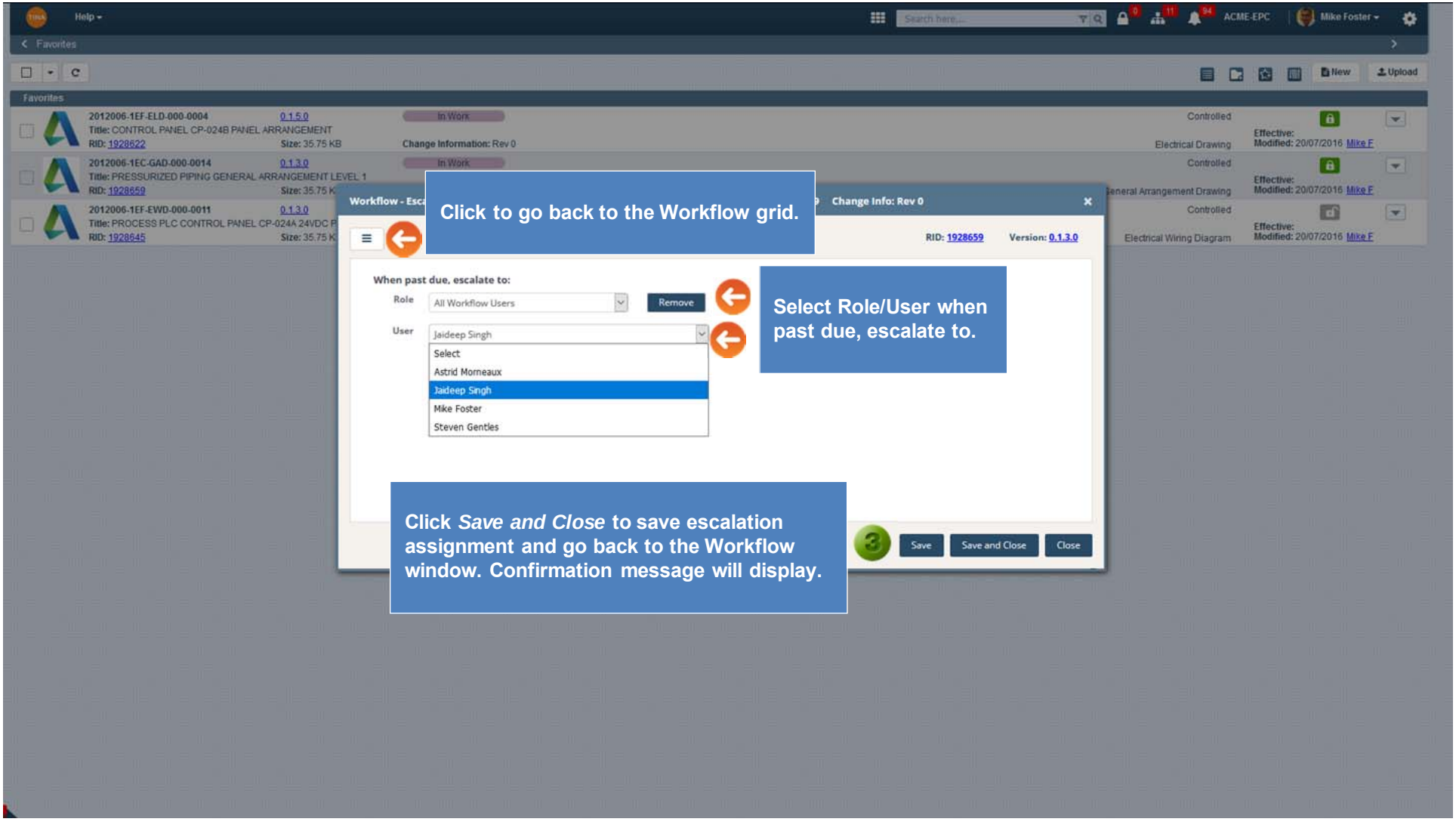
Iryna Morozova, 2016-12-22

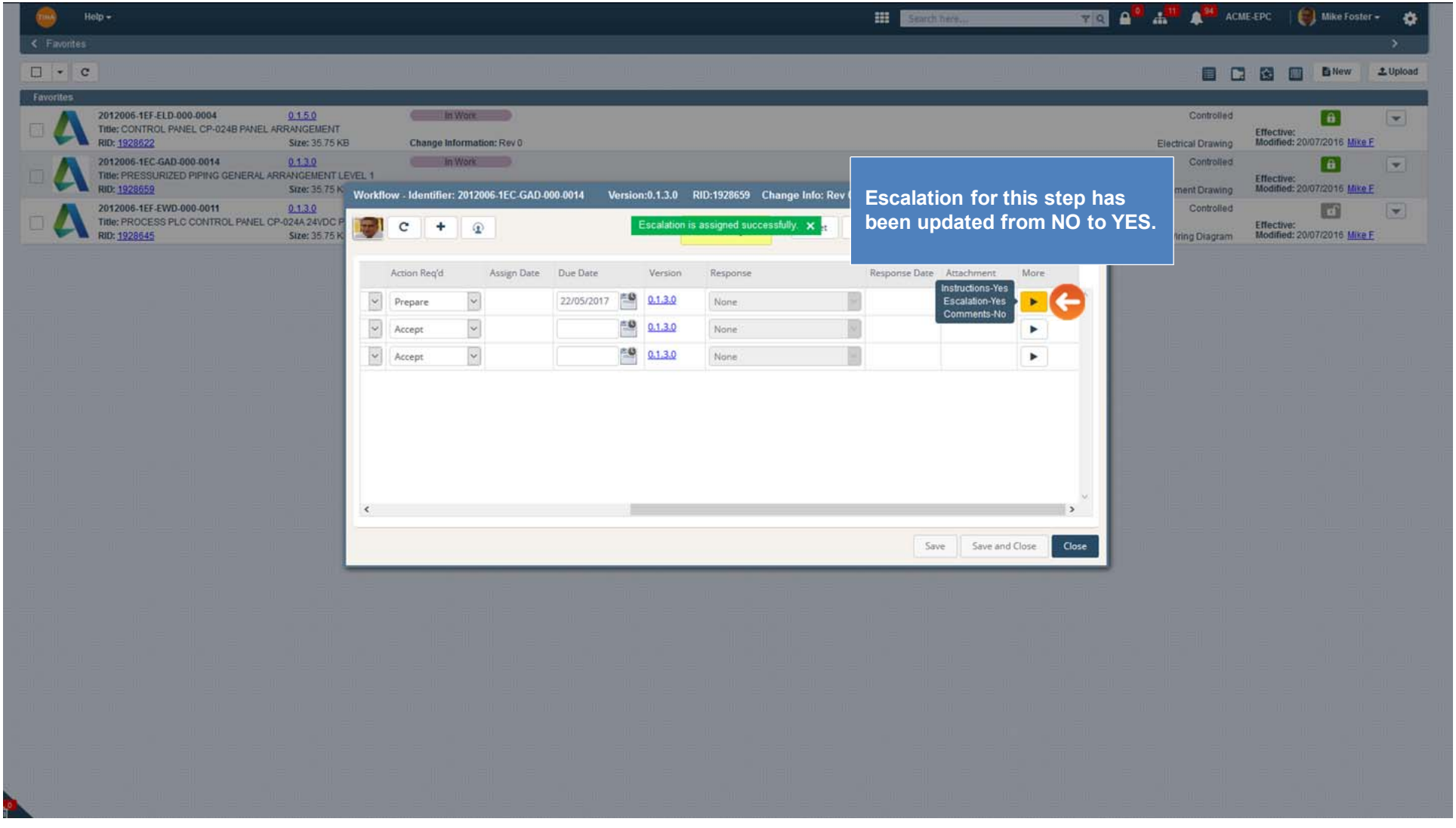

Click to go back to the Workflow grid.
Go to all steps grid
Instructions
Instructions are just the notes for the users in the Workflow. The instructions will be editable by WF Manager until the step becomes active. Once the step is active, the instructions will be locked for any editing.
Clear
Save
Save and Close
Close
Enter Instructions and click *Save and Close*.
Notifications:
• If deleting completed instructions, confirmation message "Instructions have been deleted" will be displayed on Save.
• If making some changes in the instructions, confirmation message "Instructions have been updated“ will be displayed on Save.
• If adding new instructions (from blank Instructions), confirmation message "Instructions have been added“ will be displayed on Save.

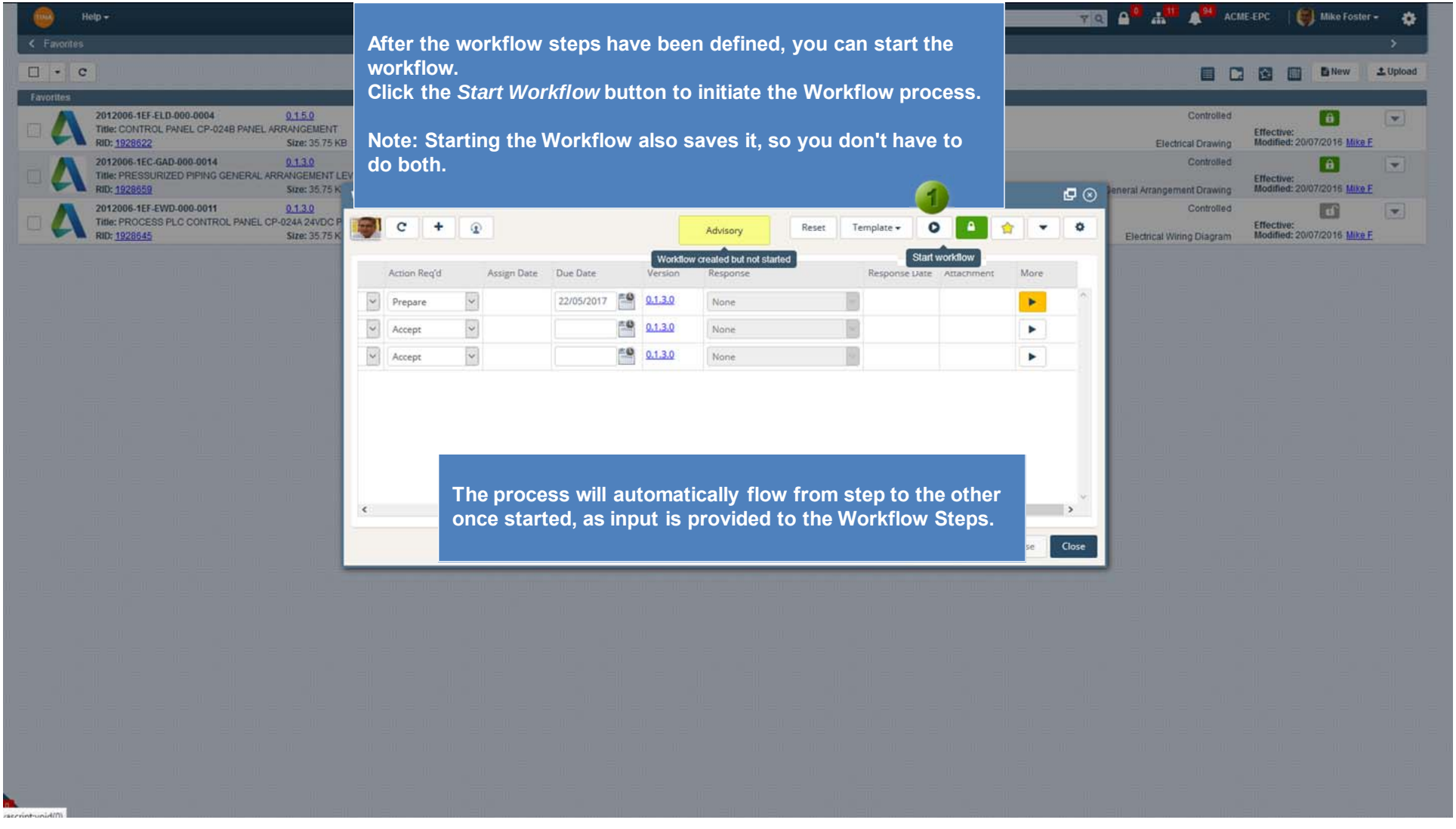

Confirmation message will display
Workflow - Identifier: 2012006-1EC
Instructions have been added
Reset
Template
Action Req'd
Assign Date
Due Date
Version
Response
Response Date
Attachment
More
Prepare
Accept
Accept
0.1.3.0
None
Instructions-Yes
Escalation-No
Comments-No
If any instruction, escalation or comment is set, the More button colour will be changed indicating that something is there.
Save
Save and Close
Close

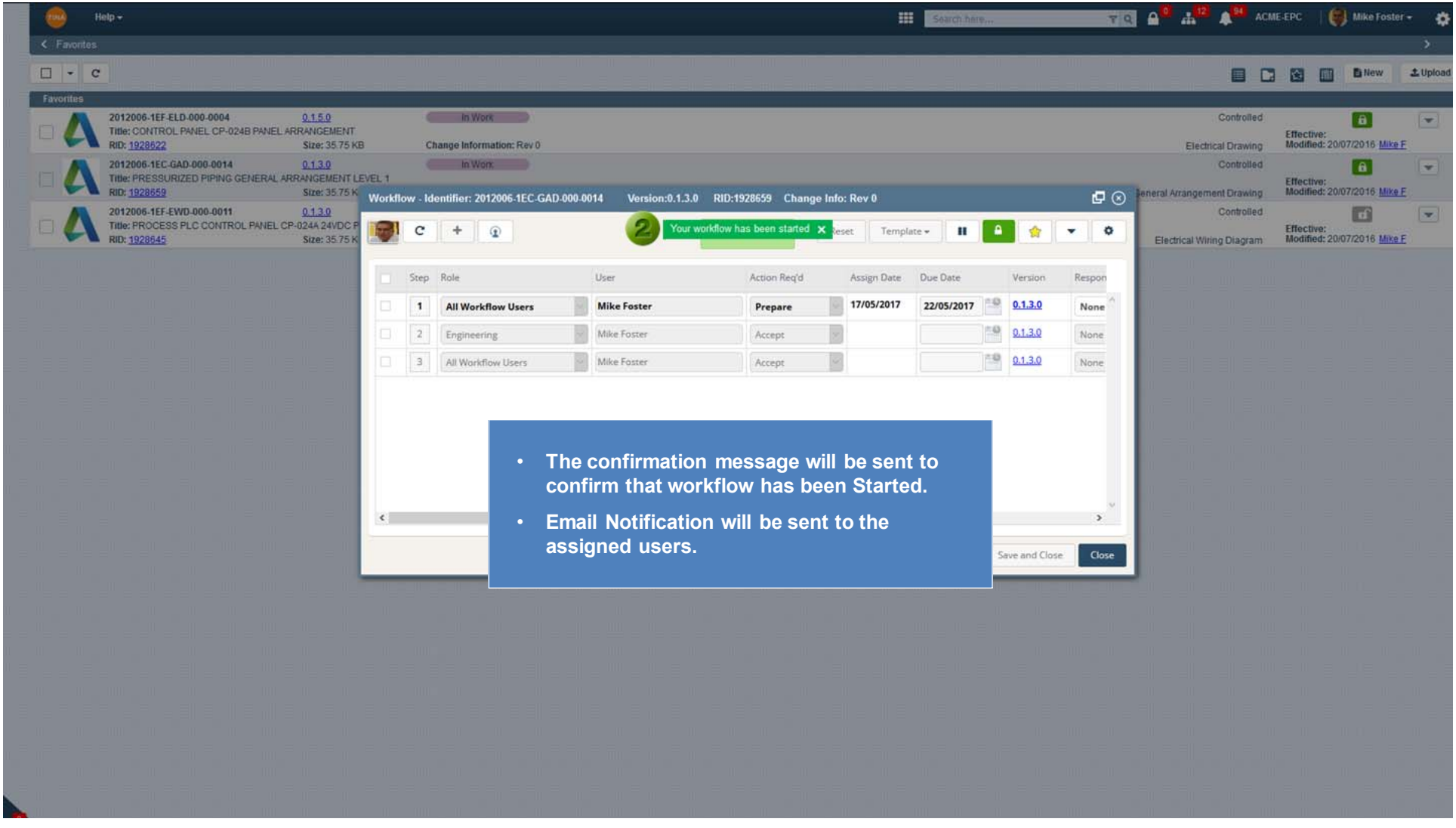

When you save newly created workflow, *Workflow Status* will be changed from *Not Started* to *Advisory*. Hover over it to see a tool-tip.
Advisory status colour is yellow.
Workflow - Identifier: 2012006-1EC-GAD-000-0014
Version:0.1.3.0
RID:1928659
Change
Advisory
Workflow created but not started
Template
Step
Role
User
Action Req'd
Assign Date
Due Date
Version
All Workflow Users
Mike Foster
Prepare
Select
Accept
Save
Save and Close
Close
Parallel Steps
If the process is set up as Parallel, all the assignees can respond to the Workflow Step at the same time. They will receive the notification to respond simultaneously as well.

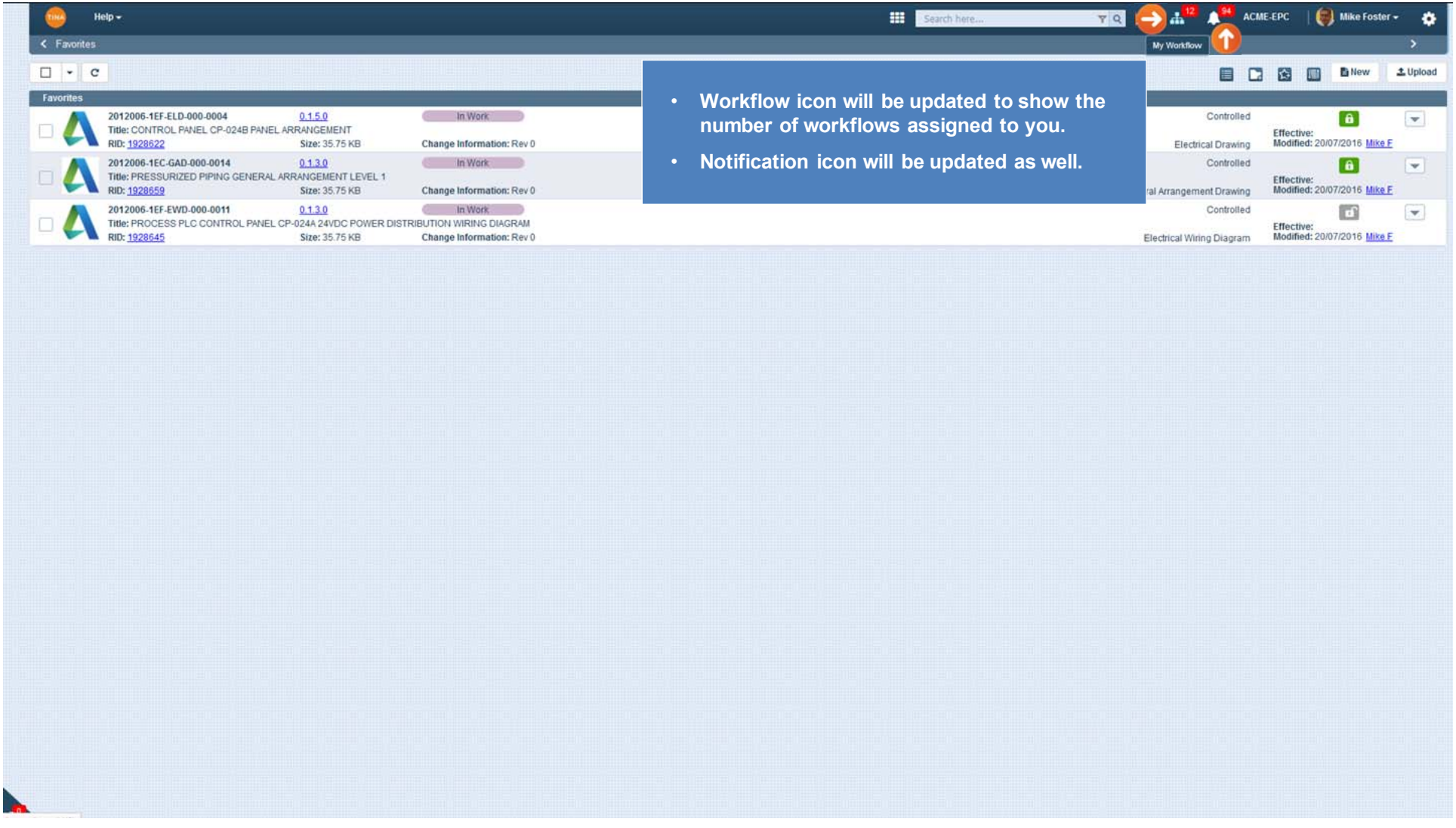

Escalation
When a Workflow is defined, the WF Manager will be able to define the person to whom any Action Item will be escalated to, in case the assigned User doesn't provide a response by *Due Date*. Escalation is an optional feature.
Select *Due Date* for the step.
Within the *Due Date*, *Calendar* defaults to the current (Today) date. Date is entered in the field as soon as you click on it, you don't have to click outside the control to select.
By inserting *Due Date*, the *Escalation* option has been activated. Click to open the *Workflow-Escalation* window.
Action Req'd
Assign Date
Due Date
Version
Response
Response Date
Attachment
More
Prepare
22/05/2017
None
May 2017
Step Details
Instructions
Escalation
Comments
Save
Save and Close


Click to go back to the Workflow grid.
Select Role/User when past due, escalate to.
Click *Save and Close* to save escalation assignment and go back to the Workflow window. Confirmation message will display.
When past due, escalate to:
Role
All Workflow Users
Remove
User
Jaideep Singh
Select
Astrid Morneaux
Jaideep Singh
Mike Foster
Steven Gentles
Change Info: Rev 0
RID: 1928659
Version: 0.1.3.0
Save
Save and Close
Close

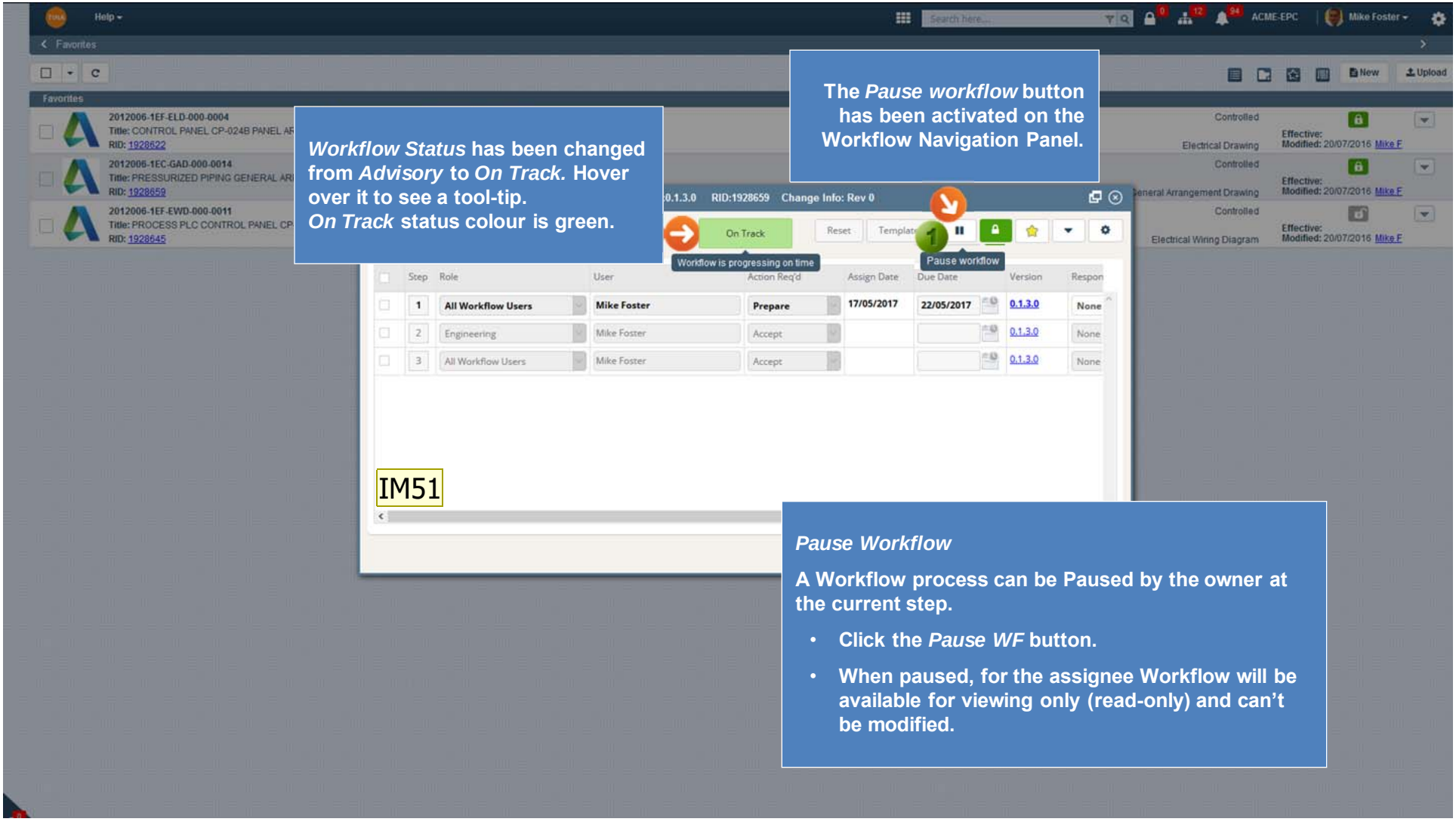

Escalation for this step has been updated from NO to YES.
Workflow - Identifier: 2012006-1EC-GAD-000-0014 Version:0.1.3.0 RID:1928659
Escalation is assigned successfully.
Action Req'd
Assign Date
Due Date
Version
Response
Response Date
Attachment
More
Prepare
22/05/2017
Accept
Accept
None
Instructions-Yes
Escalation-Yes
Comments-No
Save
Save and Close
Close


After the workflow steps have been defined, you can start the workflow.
Click the *Start Workflow* button to initiate the Workflow process.
Note: Starting the Workflow also saves it, so you don't have to do both.
1
Advisory
Workflow created but not started
Reset
Template
Start workflow
Action Req'd
Assign Date
Due Date
Version
Response
Response Date
Attachment
More
Prepare
22/05/2017
0.1.3.0
None
Accept
Accept
Close
The process will automatically flow from step to the other once started, as input is provided to the Workflow Steps.


Workflow - Identifier: 2012006-1EC-GAD-000-0014 Version:0.1.3.0 RID:1928659 Change Info: Rev 0
Your workflow has been started
Step
Role
User
Action Req'd
Assign Date
Due Date
Version
1
All Workflow Users
Mike Foster
Prepare
17/05/2017
22/05/2017
0.1.3.0
2
Engineering
Mike Foster
Accept
0.1.3.0
3
All Workflow Users
Mike Foster
Accept
0.1.3.0
Save and Close
Close
• The confirmation message will be sent to confirm that workflow has been Started.
• Email Notification will be sent to the assigned users.



- **Workflow icon will be updated to show the number of workflows assigned to you.**
- **Notification icon will be updated as well.**



Workflow Status **has been changed from *Advisory* to *On Track.* Hover over it to see a tool-tip.**
On Track **status colour is green.**

The *Pause workflow* button has been activated on the Workflow Navigation Panel.

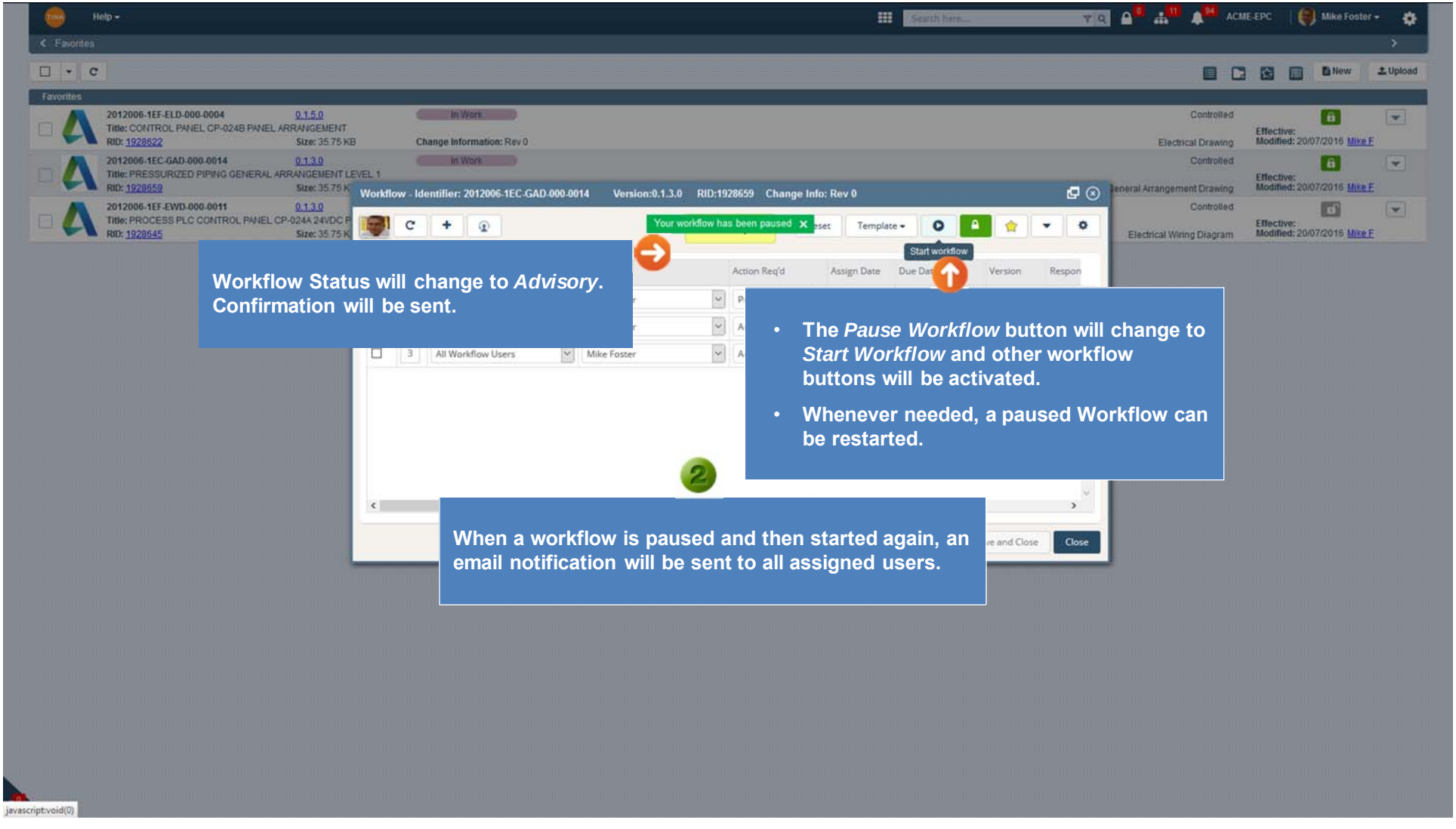
Pause Workflow

A Workflow process can be Paused by the owner at the current step.

- **Click the *Pause WF* button.**
- **When paused, for the assignee Workflow will be available for viewing only (read-only) and can't be modified.**

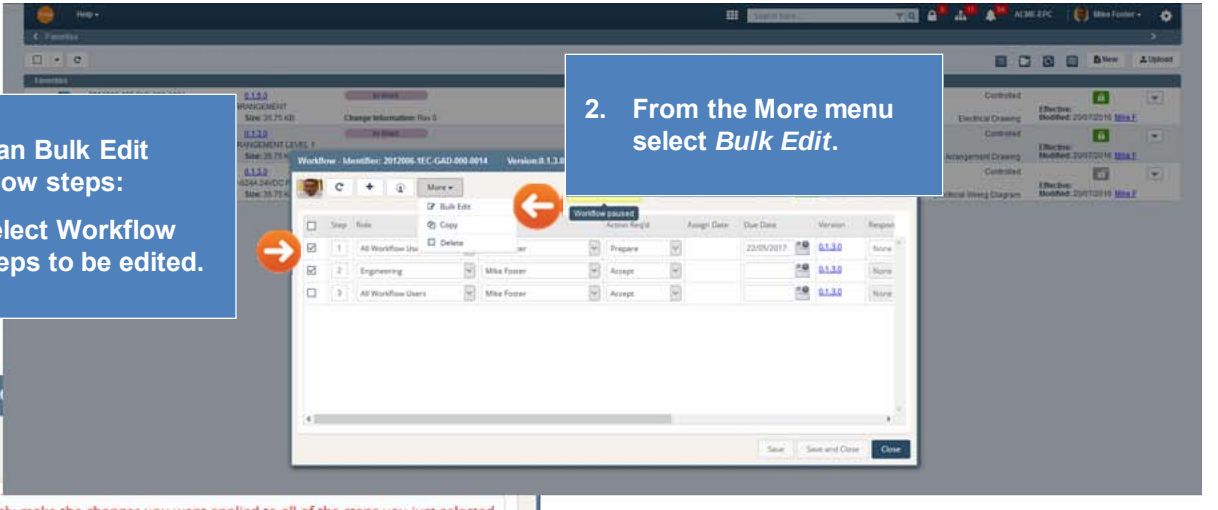
Slide 21

IM51 colours have changed **Updated.
Iryna Morozova, 2016-12-23

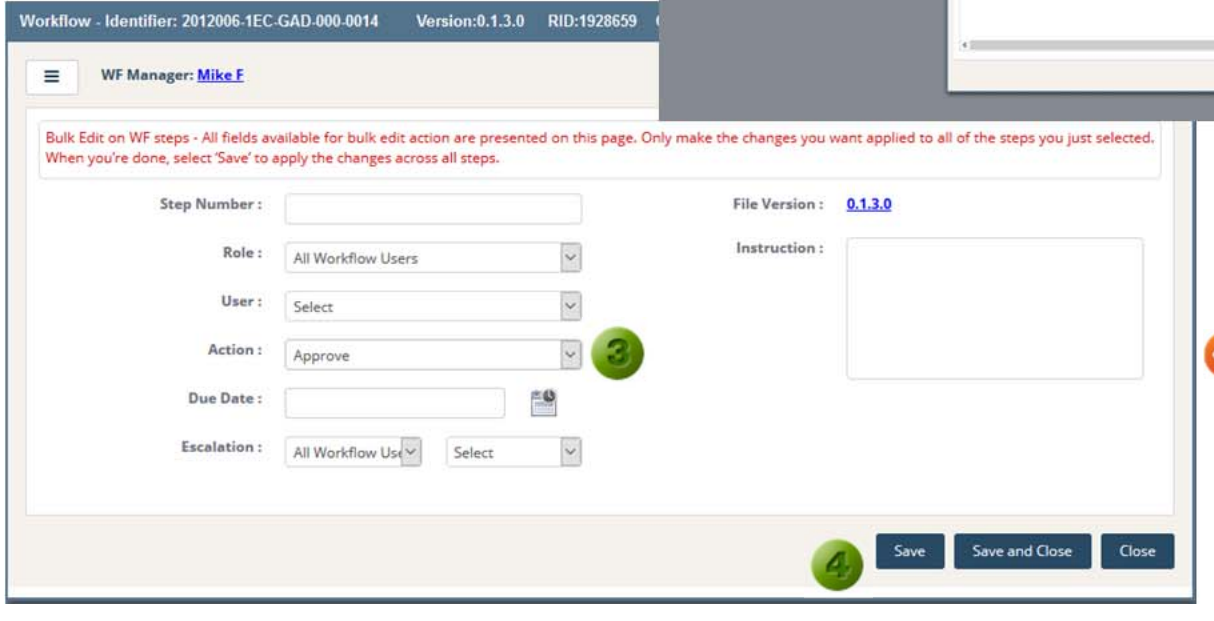

Workflow Status will change to *Advisory*. Confirmation will be sent.
Workflow - Identifier: 2012006-1EC-GAD-000-0014 Version:0.1.3.0 RID:1928659 Change Info: Rev 0
Your workflow has been paused
Template
Start workflow
Action Req'd
Assign Date
Due Date
Version
Respon
All Workflow Users
Mike Foster
Close
The *Pause Workflow* button will change to *Start Workflow* and other workflow buttons will be activated.
Whenever needed, a paused Workflow can be restarted.
When a workflow is paused and then started again, an email notification will be sent to all assigned users.

You can Bulk Edit workflow steps:

1. Select Workflow steps to be edited.

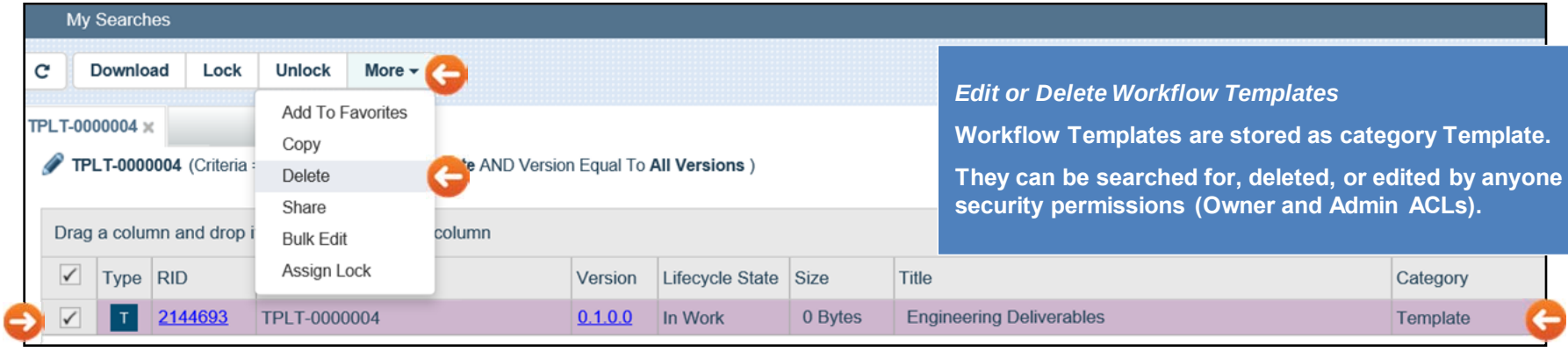


2. From the More menu select *Bulk Edit*.



3. All fields available for bulk edit action are presented on this page. Only make the changes you want applied to all of the steps you just selected.

4. Select *Save* to apply the changes across all steps.



Edit or Delete Workflow Templates

Workflow Templates are stored as category Template.

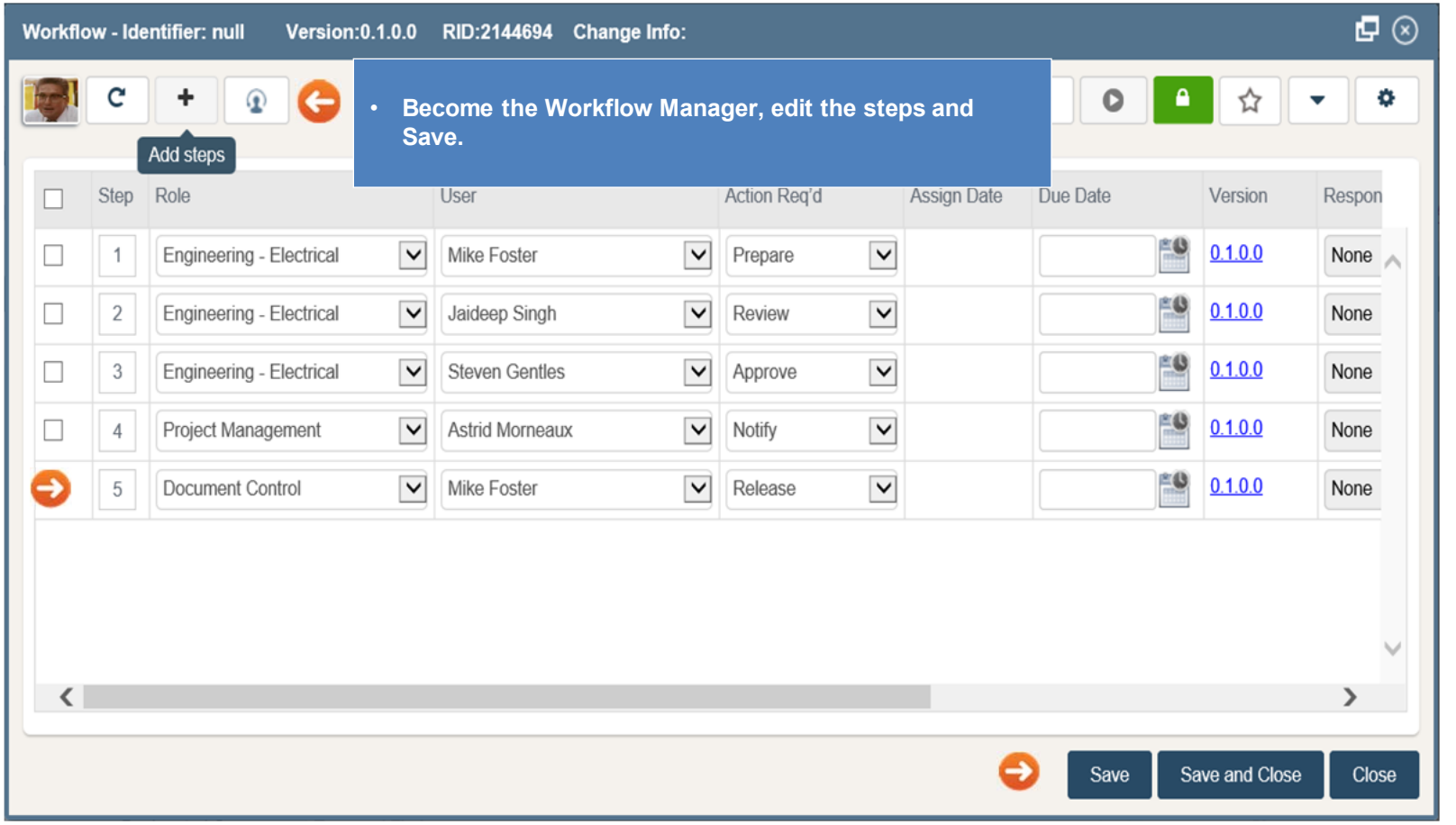
They can be searched for, deleted, or edited by anyone with security permissions (Owner and Admin ACLs).

To Delete workflow Template:

- **Search for the template Title.**
- **Checkmark the box and select *Delete* from More.**

To edit workflow Template:

- **Search for the template Title. Open Template Properties.**
- **From the Template Properties, open the *Blueprint Object RID* and go to it's Workflow.**


Workflow - Identifier: null
Version:0.1.0.0
RID:2144694
Change Info:
Add steps
• Become the Workflow Manager, edit the steps and Save.
Step
Role
User
Action Req'd
Assign Date
Due Date
Version
Respon
1
Engineering - Electrical
Mike Foster
Prepare
0.1.0.0
None
2
Engineering - Electrical
Jaideep Singh
Review
0.1.0.0
None
3
Engineering - Electrical
Steven Gentles
Approve
0.1.0.0
None
4
Project Management
Astrid Morneaux
Notify
0.1.0.0
None
5
Document Control
Mike Foster
Release
0.1.0.0
None
Save
Save and Close
Close