

Section 10

Workflow

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Help

UBINFO-0000010

ACME-EPC

Mike Foster

Favorites

2012006-1EF-ELD-000-0004

0.1.5.0

In Work

Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT

RID: 1928622

Size: 35.75 KB

Change Information: Rev 0

2012006-1EC-GAD-000-0014

0.1.3.0

In Work

Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1

RID: 1928659

Size: 35.75 KB

Change Information: Rev 0

2012006-1EF-EWD-000-0011

0.1.3.0

In Work

Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC POWER DISTRIBUTION WIRING DIAGRAM

RID: 1928645

Size: 35.75 KB

Change Information: Rev 0

Click My Workflow icon to open My Workflows page.

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.

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

Properties

Files

Upload

Workflow

Version-Up

00010

ACME-EPC | Mike Foster

Controlled: Effective: Modified: 20/07/2016 Mike F

Electrical Drawing

Controlled: Effective: Modified: 20/07/2016 Mike F

General Arrangement Drawing

Controlled: Effective: Modified: 20/07/2016 Mike F

Electrical Wiring Diagram

Version Response

0.1.3.0 Prepa

0.1.3.0 Review

0.1.3.0 Appro

0.1.3.0 None

0.1.3.0 None

Save Save and Close Close

Workflow - Identifier: 2012006-1EF-E

WF Manager: Steven Gentles

Step Role

1 Engineering - Electrical

2 Engineering - Electrical

3 Engineering - Electrical

4 Project Manager

5 Document Controller

Change Workflow Manager

Make Me

m

Mike Foster

2012006-1EF-ELD-000-0004 0.1.5.0 In Work

Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT

RID: 1928622 Size: 35.75 KB Change Information: Rev 0

2012006-1EC-GAD-000-0014 0.1.3.0 In Work

Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1

RID: 1928659 Size: 35.75 KB

2012006-1EF-EWD-000-0011 0.1.3.0

Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P

RID: 1928645 Size: 35.75 KB

You will see the Workflow Manager at the top of the Workflow. Tool-tip will display WF Manager name.

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.

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

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.

TINAHelp

UINFO-0000010

ACME-EPCMike Foster

< Favorites

NewUpload

Favorites

2012006-1EF-ELD-000-0004

0.1.5.0

In Work

Controlled

Effective: 20/07/2016Mike F

2012006-1EC-GAD-000-0004

0.1.3.0

Not Work

Electrical Drawing

Effective: 20/07/2016Mike F

2012006-1EF-EWD-000-0004

0.1.3.0

Not Work

General Arrangement Drawing

Effective: 20/07/2016Mike F

2012006-1EF-PLC-000-0004

0.1.3.0

Not Work

Electrical Wiring Diagram

Effective: 20/07/2016Mike F

Change Info: Rev 0

ResetTemplate

Save as Template

Select from Template

Req'd

Date

Version

Respon

1

All Workflow Users

Mike Foster

Accept

0.1.3.0

2

All Workflow Users

Mike Foster

Accept

0.1.3.0

Save

Save and Close

Close

If you wish, you can save your workflow as a template. By selecting the *Save as Template* option, next window - *Template Information* will open.

javascript:void(0)

The screenshot displays a software interface for managing workflows. A 'Template Information' dialog box is open, with a red arrow pointing to the 'Title' field, which contains the text 'Modification Plan Template'. The 'Description' field is empty. The dialog has 'Save' and 'Cancel' buttons at the bottom right. In the background, a workflow is being viewed with the identifier '2012006-1EC-GAD-000-0014', version '0.1.3.0', and RID '1928659'. The workflow is titled 'General Arrangement Drawing' and is in a 'Controlled' state. A list of favorites is visible on the left, including '2012006-1EF-ELD-000-0004' and '2012006-1EC-GAD-000-0014'. A blue callout box on the left contains the text: 'Enter Template information and Save. Your workflow will be saved as a template. Confirmation message will be sent.' A blue callout box on the right contains the text: '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.'

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.

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.

2012006-1EF-ELD-000-0004
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 1928622
Size: 35.75 KB

2012006-1EC-GAD-000-0014
Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1
RID: 1928659
Size: 35.75 KB

2012006-1EF-EWD-000-0011
Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P
RID: 1928645
Size: 35.75 KB

Workflow - Ident

Advisory

Reset

Template

Title	Description	Category	Created By	Created Time
Engineering Deliverables	Prepare thru Release	Electrical Wiring Diagram	Astrid Morneau	19/07/2016

Select

Cancel

Controlled

Electrical Drawing

Effective: Modified: 20/07/2016 Mike F

Controlled

General Arrangement Drawing

Effective: Modified: 20/07/2016 Mike F

Controlled

Electrical Wiring Diagram

Effective: Modified: 20/07/2016 Mike F

All available Templates will be listed in the Workflow window.

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.

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.

2. From the corresponding pick lists select User, Role and Required Action

By selecting a Role, WF Manager can specify a user who belongs to this specific role.

3. Click Save to save WF steps.

Re-ordering Steps

You can edit the step numbers to re-order. Re-order will happen automatically.

Step	Role	User	Action Req'd	Assign
1	All Workflow Users	Mike Foster	Prepare	
2	Engineering	Select	Accept	
3	All Workflow Users	Select	Accept	

The screenshot displays the AECO Workbench software interface. On the left, a 'Favorites' list shows three items with their respective IDs and titles. The main workspace is divided into a 'Workflow' section on the left and a 'Change Info' section on the right. The 'Workflow' section contains a table with columns for 'Action Req'd', 'Assign Date', and 'Due Date'. The 'Change Info' section shows details for 'Rev 0' and includes a 'Menu' dropdown. Several blue callout boxes provide instructions on how to use the workflow features.

Callout 1 (Top Left): Reset Workflow steps Icon will reset WF steps to default.

Callout 2 (Top Right): You can Lock/Unlock object, Add to Favorites from the Workflow window or have access to the Menu.

Callout 3 (Middle Left): To add WF instruction, select *Instructions* from the *More* dropdown menu.

Callout 4 (Middle Right): Escalation option will be enabled only if you select a *Due Date* value.

Callout 5 (Bottom Center): If WF assignee adds comments, then *Comments* option will be enabled.

Slide 11

IM50

no shortform **Updated

Iryna Morozova, 2016-12-22

The screenshot shows a software interface with a top navigation bar containing a 'Help' menu, a search bar, and user information for 'Mike Foster'. Below the navigation bar is a 'Favorites' section listing three items with their titles, RIDs, sizes, and versions. A 'Workflow - Ins' dialog box is open, displaying a 'Go to all steps grid' button and a list of users. A blue text box with a green circle '3' points to the 'Go to all steps grid' button, containing the text: 'Click to go back to the Workflow grid.' Another blue text box with a green circle '4' points to the 'Save and Close' button in the dialog, containing the text: 'Enter Instructions and click Save and Close.' A third blue text box on the left, titled 'Notifications:', contains a list of three bullet points regarding confirmation messages for deleting, updating, and adding instructions. The background shows a list of favorites with details like 'Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT', 'RID: 1928622', 'Size: 35.75 KB', and 'Version: 0.1.5.0'.

Help

Search here...

ACME-EPC Mike Foster

Favorites

<input type="checkbox"/>		2012006-1EF-ELD-000-0004	0.1.5.0	In Work	Controlled
		Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT			Effective: Modified: 20/07/2016 Mike F
		RID: 1928622	Size: 35.75 KB	Change Information: Rev 0	
<input type="checkbox"/>		2012006-1EC-GAD-000-0014	0.1.3.0	In Work	Controlled
		Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1			Effective: Modified: 20/07/2016 Mike F
		RID: 1928659	Size: 35.75 KB		
<input type="checkbox"/>		2012006-1EF-EVD-000-0011	0.1.3.0		Controlled
		Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P			Effective: Modified: 20/07/2016 Mike F
		RID: 1928645	Size: 35.75 KB		

Workflow - Ins

Go to all steps grid

Click to go back to the Workflow 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.

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.

Enter Instructions and click Save and Close.

Clear Save Save and Close Close

Help

Search here

01194ACME-EPCMike Foster

← Favorites

→

2012006-1EF-ELD-000-0004
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 1928622
Size: 35.75 KB

In Work

Change Information: Rev

2012006-1EC-GAD-000-0014
Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1
RID: 1928659
Size: 35.75 KB

In Work

2012006-1EF-EWD-000-0011
Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P
RID: 1928645
Size: 35.75 KB

Controlled

Effective: 20/07/2016
Modified: 20/07/2016 Mike F

Electrical Drawing

Controlled

Effective: 20/07/2016
Modified: 20/07/2016 Mike F

General Arrangement Drawing

Controlled

Effective: 20/07/2016
Modified: 20/07/2016 Mike F

Electrical Wiring Diagram

Controlled

Effective: 20/07/2016
Modified: 20/07/2016 Mike F

Workflow - Identifier: 2012006-1EC

5

Instructions have been added

Reset

Template

Action Req'd	Assign Date	Due Date	Version	Response	Response Date	Attachment	More
<div>▼</div> Prepare <div>▼</div>			<div></div> 0.1.3.0	None			<div>▶</div> <div>◀</div>
<div>▼</div> Accept <div>▼</div>			<div></div> 0.1.3.0	None			<div>▶</div>
<div>▼</div> Accept <div>▼</div>			<div></div> 0.1.3.0	None			<div>▶</div>

Instructions-Yes

Escalation-No

Comments-No

Save

Save and Close

Close

Confirmation message will display

If any instruction, escalation or comment is set, the *More* button colour will be changed indicating that something is there.

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.

The screenshot shows a workflow management interface. A table lists workflow steps with columns: Action Req'd, Assign Date, Due Date, Version, Response, Response Date, Attachment, and More. The first step is 'Prepare' with an assign date of '22/05/2017' and a version of '1.0'. A calendar pop-up is open over the 'Due Date' field, showing the month of May 2017. The calendar has a grid with days of the week (Su to Sa) and dates (1 to 31). A green circle with the number '1' is placed over the 'Due Date' field, and another green circle with the number '2' is placed over the 'More' button. The 'More' button has a dropdown menu with options: Step Details, Instructions, Escalation, and Comments. The 'Escalation' option is highlighted. At the bottom of the interface, there are 'Save' and 'Save and Close' buttons.

Action Req'd	Assign Date	Due Date	Version	Response	Response Date	Attachment	More
Prepare	22/05/2017	1.0	None				Step Details Instructions Escalation Comments

Workflow - Escalation

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 Morneau

Jaideep Singh

Mike Foster

Steven Gentles

Save Save and Close Close

2012006-1EF-ELD-000-0004 0.1.5.0 In Work Controlled Effective: Modified: 20/07/2016 Mike F

Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT

RID: 1928622 Size: 35.75 KB Change Information: Rev 0

2012006-1EC-GAD-000-0014 0.1.3.0 In Work Controlled Effective: Modified: 20/07/2016 Mike F

Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1

RID: 1928659 Size: 35.75 KB Change Information: Rev 0

2012006-1EF-EWD-000-0011 0.1.3.0 In Work Controlled Effective: Modified: 20/07/2016 Mike F

Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P

RID: 1928645 Size: 35.75 KB Change Information: Rev 0

General Arrangement Drawing

Electrical Drawing

Electrical Wiring Diagram

ACME-EPC Mike Foster

Search here...

Help

Favorites

New Upload

Help

Search here...

ACME-EPC

Mike Foster

Favorites

2012006-1EF-ELD-000-0004

0.1.5.0

In Work

Controlled

Effective: 20/07/2016

Modified: 20/07/2016

Mike F

Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT

RID: 1928622

Size: 35.75 KB

Change Information: Rev 0

2012006-1EC-GAD-000-0014

0.1.3.0

In Work

Controlled

Effective: 20/07/2016

Modified: 20/07/2016

Mike F

Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1

RID: 1928659

Size: 35.75 KB

Change Information: Rev 0

2012006-1EF-EWD-000-0011

0.1.3.0

In Work

Controlled

Effective: 20/07/2016

Modified: 20/07/2016

Mike F

Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P

RID: 1928645

Size: 35.75 KB

Change Information: Rev 0

Workflow - Identifier: 2012006-1EC-GAD-000-0014 Version: 0.1.3.0 RID: 1928659 Change Info: Rev 0

Escalation is assigned successfully

Action Req'd	Assign Date	Due Date	Version	Response	Response Date	Attachment	More
<input checked="" type="checkbox"/> Prepare		22/05/2017	0.1.3.0	None			<div>Instructions-Yes Escalation-Yes Comments-No</div>
<input checked="" type="checkbox"/> Accept			0.1.3.0	None			
<input checked="" type="checkbox"/> Accept			0.1.3.0	None			

Save Save and Close Close

Escalation for this step has been updated from NO to YES.

Help

< Favorites

Favorites

- 2012006-1EF-ELD-000-0004 0.1.5.0
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 1928622 Size: 35.75 KB
- 2012006-1EC-GAD-000-0014 0.1.3.0
Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEV
RID: 1928659 Size: 35.75 KB
- 2012006-1EF-EWD-000-0011 0.1.3.0
Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P
RID: 1928645 Size: 35.75 KB

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.

Workflow created but not started

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			0.1.3.0	None			
Accept			0.1.3.0	None			

The process will automatically flow from step to the other once started, as input is provided to the Workflow Steps.

Close

ACME-EPC | Mike Foster

New Upload

Controlled

Electrical Drawing Effective: Modified: 20/07/2016 Mike F

Controlled

General Arrangement Drawing Effective: Modified: 20/07/2016 Mike F

Controlled

Electrical Wiring Diagram Effective: Modified: 20/07/2016 Mike F

Help

Search here...

01294ACME-EPCMike Foster

Favorites

2012006-1EF-ELD-000-0004

0.1.5.0

In Work

Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT

RID: 1928622

Size: 35.75 KB

Change Information: Rev 0

2012006-1EC-GAD-000-0014

0.1.3.0

In Work

Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1

RID: 1928659

Size: 35.75 KB

2012006-1EF-EWD-000-0011

0.1.3.0

Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P

RID: 1928645

Size: 35.75 KB

Controlled

Effective: 20/07/2016

Modified: 20/07/2016

Mike F

Electrical Drawing

Controlled

Effective: 20/07/2016

Modified: 20/07/2016

Mike F

General Arrangement Drawing

Controlled

Effective: 20/07/2016

Modified: 20/07/2016

Mike F

Electrical Wiring Diagram

Controlled

Effective: 20/07/2016

Modified: 20/07/2016

Mike F

Workflow - Identifier: 2012006-1EC-GAD-000-0014

Version: 0.1.3.0

RID: 1928659

Change Info: Rev 0

2

Your workflow has been started

Reset

Template

Pause

Lock

Star

Dropdown

Settings

Step	Role	User	Action Req'd	Assign Date	Due Date	Version	Response
1	All Workflow Users	Mike Foster	Prepare	17/05/2017	22/05/2017	0.1.3.0	None
2	Engineering	Mike Foster	Accept			0.1.3.0	None
3	All Workflow Users	Mike Foster	Accept			0.1.3.0	None


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.

← Favorites

☐



2012006-1EF-ELD-000-0004

[0.1.5.0](#)

In Work


Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT

RID: [1928622](#)

Size: 35.75 KB

Change Information: Rev 0

☐



2012006-1EC-GAD-000-0014

[0.1.3.0](#)

In Work


Title: PRESSURIZED PIPING GENERAL ARRANGEMENT LEVEL 1

RID: [1928659](#)

Size: 35.75 KB

Change Information: Rev 0

☐



2012006-1EF-EWD-000-0011

[0.1.3.0](#)

In Work

Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC POWER DISTRIBUTION WIRING DIAGRAM

RID: [1928645](#)

Size: 35.75 KB

Change Information: Rev 0

My Workflow



Controlled

Effective:  Modified: 20/07/2016 [Mike F](#)

Electrical Drawing

Effective:  Modified: 20/07/2016 [Mike F](#)

Controlled

Effective:  Modified: 20/07/2016 [Mike F](#)

al Arrangement Drawing

Effective:  Modified: 20/07/2016 [Mike F](#)

Controlled

Effective:  Modified: 20/07/2016 [Mike F](#)

Electrical Wiring Diagram

Effective:  Modified: 20/07/2016 [Mike F](#)

- 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.

IM51

0.1.3.0 RID:1928659 Change Info: Rev 0

On Track Reset Template

Workflow is progressing on time

Pause workflow

Step	Role	User	Action Req'd	Assign Date	Due Date	Version	Respon
1	All Workflow Users	Mike Foster	Prepare	17/05/2017	22/05/2017	0.1.3.0	None
2	Engineering	Mike Foster	Accept			0.1.3.0	None
3	All Workflow Users	Mike Foster	Accept			0.1.3.0	None

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.

- The *Pause Workflow* button will change to *Start Workflow* and other workflow buttons will be activated.
- Whenever needed, a paused Workflow can be restarted.

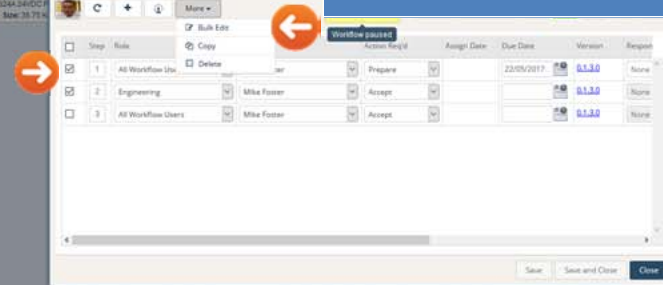
When a workflow is paused and then started again, an email notification will be sent to all assigned users.

javascript:void(0)

You can Bulk Edit workflow steps:

1. Select Workflow steps to be edited.

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



Bulk Edit on WF steps - 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. When you're done, select 'Save' to apply the changes across all steps.

Step Number :

Role :

User :

Action :

Due Date :

Escalation :

File Version : [0.1.3.0](#)

Instruction :

4

Save

Save and Close

Close

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.

My Searches

Download
Lock
Unlock
More

TPLT-0000004

Delete
Add To Favorites
Copy
Share
Bulk Edit
Assign Lock

Type
RID
Version
Lifecycle State
Size
Title
Category

☒
☒
T
2144693
TPLT-0000004
0.1.0.0
In Work
0 Bytes
Engineering Deliverables
Template

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).

Primary Identifier

TPLT-0000004

Secondary Identifier

Title

Engineering Deliverables

Description

Prepare thru Release

Category

Template

Project

Select

Blueprint Object RID

2144694

0.1.0.0

Workflow for Template

- 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.

Lifecycle

Not Started

Status

Controlled

Change Info :

Workflow Template

RID : 2144694

Category : Work Flow

Version : 0.1.0.0

Size : 0 Bytes

Files

Workflow

Supporting Items

Tree

Workflow - Identifier: null

Version:0.1.0.0

RID:2144694

Change Info:



- Become the Workflow Manager, edit the steps and Save.



Add steps

<input type="checkbox"/>	Step	Role	User	Action Req'd	Assign Date	Due Date	Version	Response
<input type="checkbox"/>	1	Engineering - Electrical <input type="checkbox"/>	Mike Foster <input type="checkbox"/>	Prepare <input type="checkbox"/>		<input type="text"/>	0.1.0.0	None
<input type="checkbox"/>	2	Engineering - Electrical <input type="checkbox"/>	Jaideep Singh <input type="checkbox"/>	Review <input type="checkbox"/>		<input type="text"/>	0.1.0.0	None
<input type="checkbox"/>	3	Engineering - Electrical <input type="checkbox"/>	Steven Gentles <input type="checkbox"/>	Approve <input type="checkbox"/>		<input type="text"/>	0.1.0.0	None
<input type="checkbox"/>	4	Project Management <input type="checkbox"/>	Astrid Morneau <input type="checkbox"/>	Notify <input type="checkbox"/>		<input type="text"/>	0.1.0.0	None
	5	Document Control <input type="checkbox"/>	Mike Foster <input type="checkbox"/>	Release <input type="checkbox"/>		<input type="text"/>	0.1.0.0	None



Save

Save and Close

Close