Add-On Solution Package
„Workflow Utitlites 3-0 - Concepts “

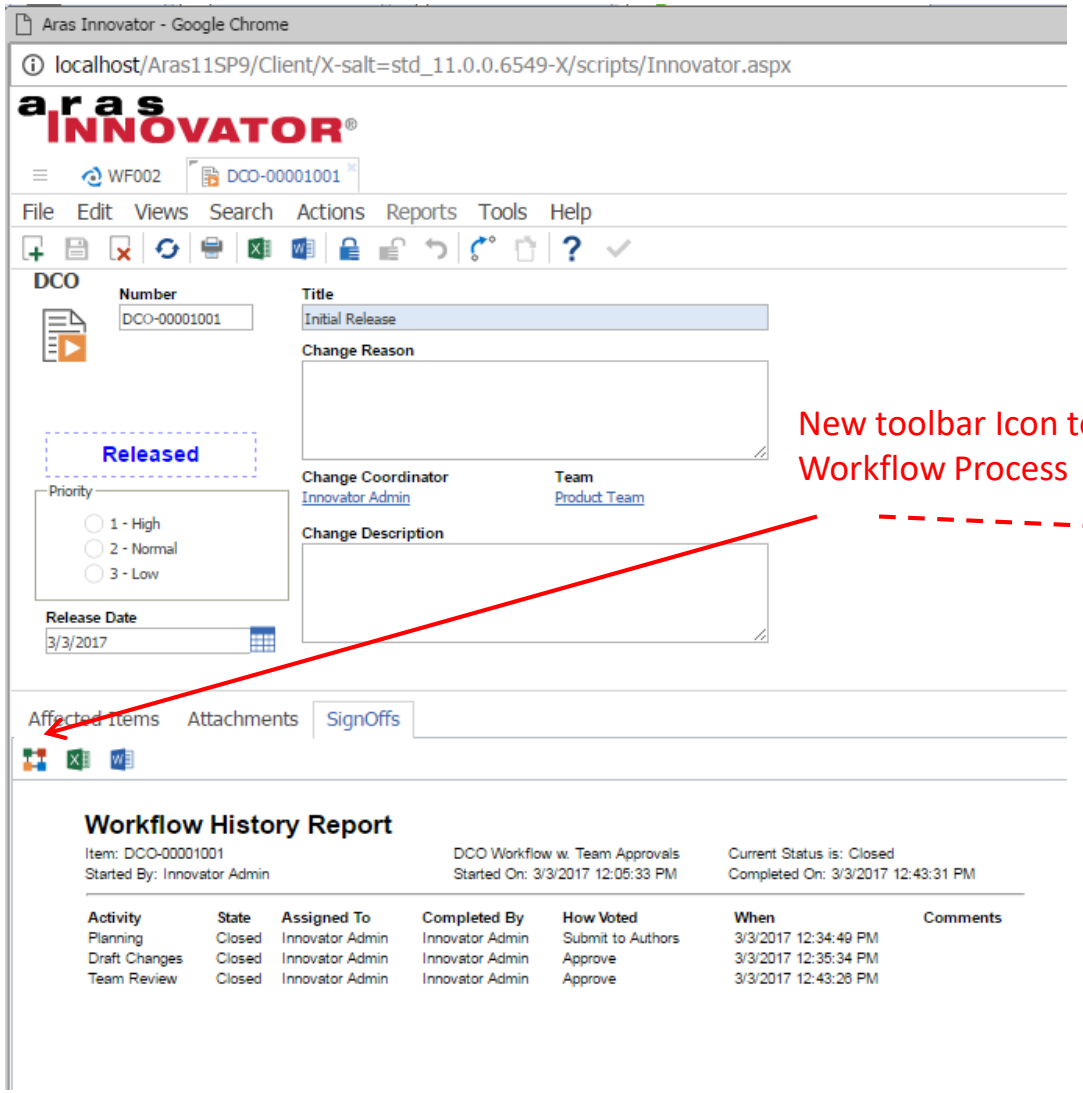
A mix of various features (primarily methods) to help automate workflows. Importing the package does not necessarily activate these features. Please read the documentation to learn how to best make use of them.

- Resolve Placeholder Indentities on WF Activities (onAssign). This may be the most powerful feature in this package. It consists of:
  - a method: "WF ResolvePlaceHolderOnActivity" to be added to Activity Server Events.
  - And a new property on Identities "place_holder_resolution_rule"
- Adds a toolbar button on Workflow History Form to open the view of the Workflow Process directly from the “SignOffs” tab
- Logic to change WF Activities’ permissions to allow “adhoc” Workflow Assignments. (no longer required for Aras Innovator 11SP5 and hiogher)
  - Can be triggered from Life Cycle transitions or when Workflow Activities get activated.
  - An example is added to the Express DCO’s life cycle.
- Logic to set activities to “automated” , if no assignments are configured.
  - This way you can set up many sequential activities with no assignments and use “ad-hoc” assignment
  - on the ones you want to activate after the workflow process was started.
- Logic to „clone“ an activity when you loop to it again so you can still add different „ad-hoc“ assignments.
  - The „Team Review Express DCO“ workflow (sample) has an example how to use this logic.
- Adds a “single Review Express DCO Workflow” that can be used instead of the standard workflow.
- Adds a “Team Review Express DCO Workflow” that can be used instead of the standard workflow.
- Sample code to show how to save data from Workflow Activities to the (affected) item connected to the workflow process.
- A separate package with a custom(sample) Workflow using WF Utiltites to show how to programmatically instantiate a workflow and how to use an approver matrix (do not use in production !)

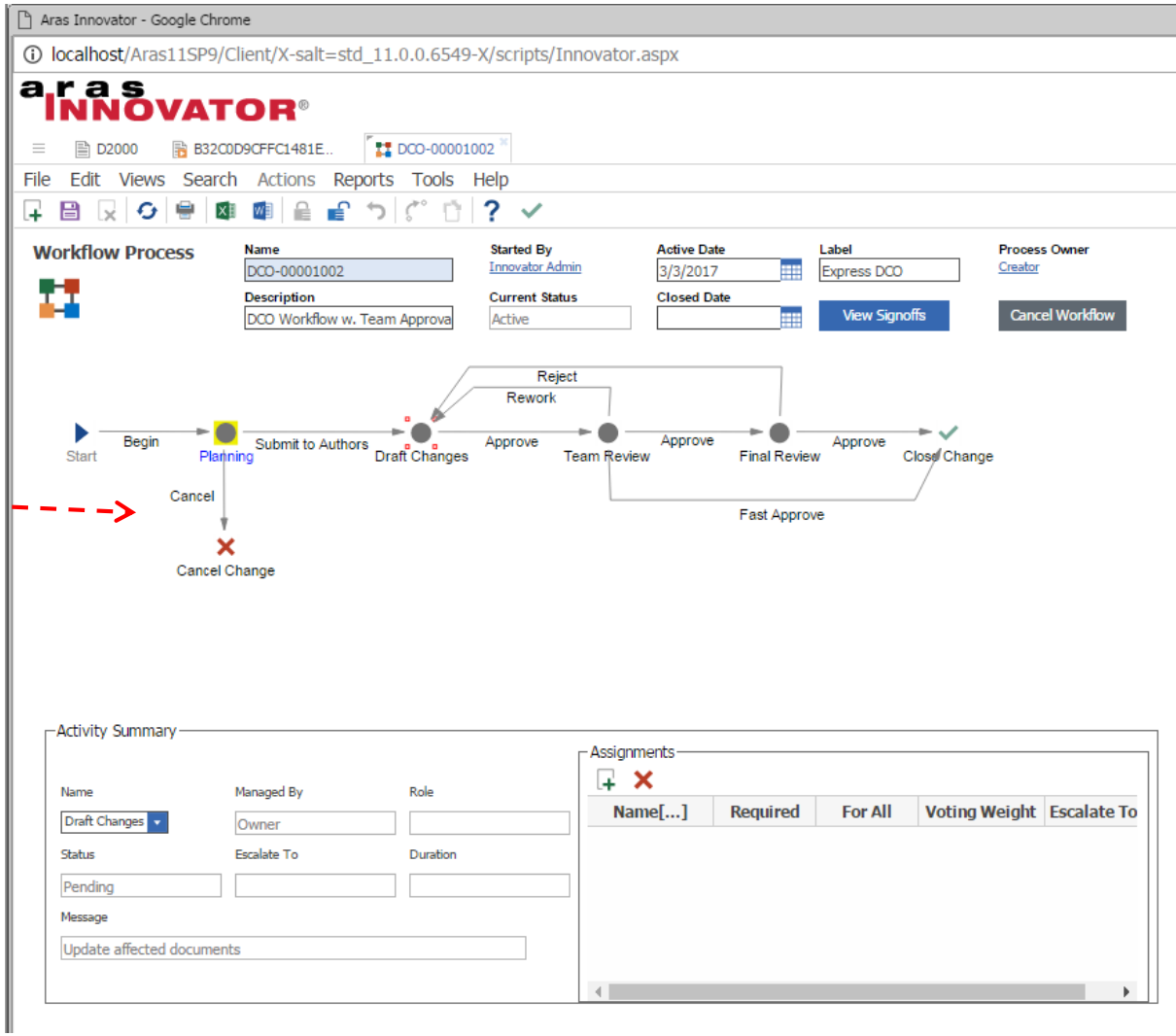
Installation

- Use the Aras Packaging Utiltities Import Tool to import the package „Workflow Utitlites - Concepts –vN-n“ in multiple steps.
- There are optional installation steps.
- See Readme.txt for more Details

View Workflow from SignOff Tab



New toolbar Icon to open the Workflow Process

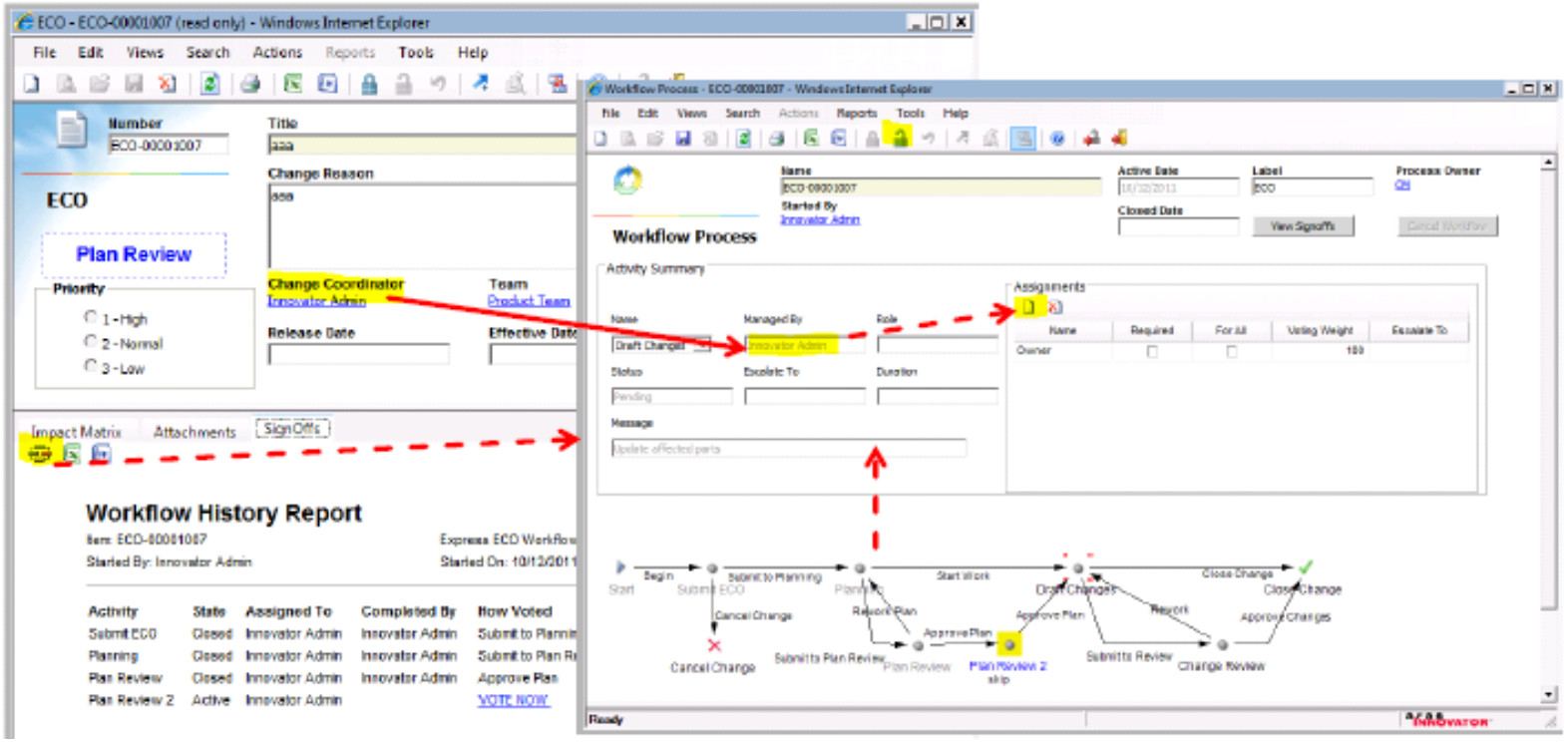


Set Permissions to allow adhoc Assignments on Workflow Process

Note:
For Aras innovator 11 SP5 and higher
This is no longer required.

Permissions to add Adhoc Assignment are now handled by the Core !

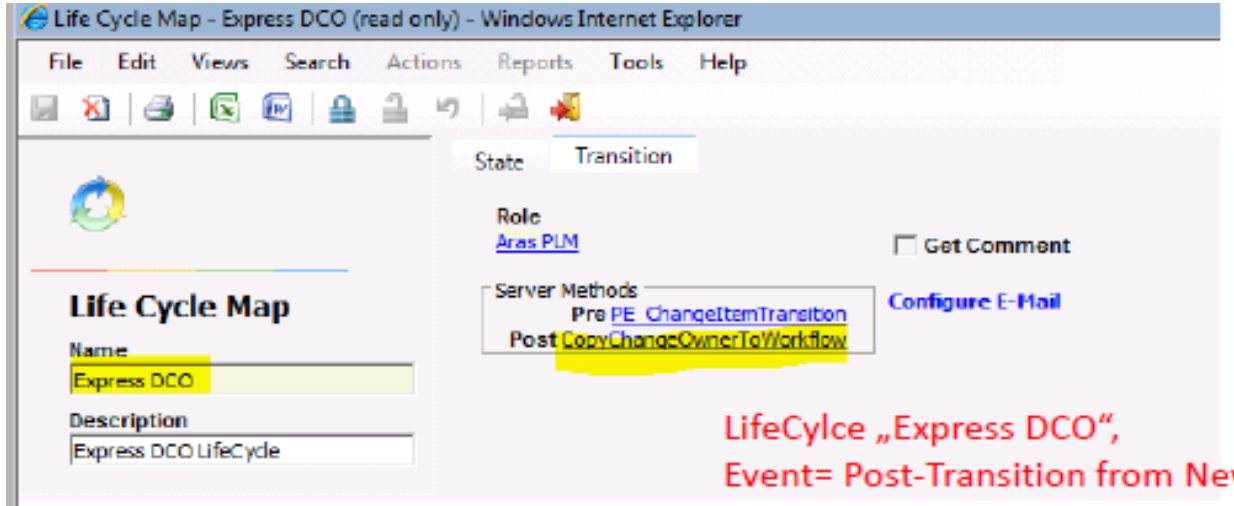
New Method: „**CopyChangeOwnerToWorkflow“**
The Owner (i.e. Change Coordinator) of the workflow controlled item will be set to be the owner of all workflow activities. The Logic can be triggered (added) on Workflow controlled item or workflow path/activity.



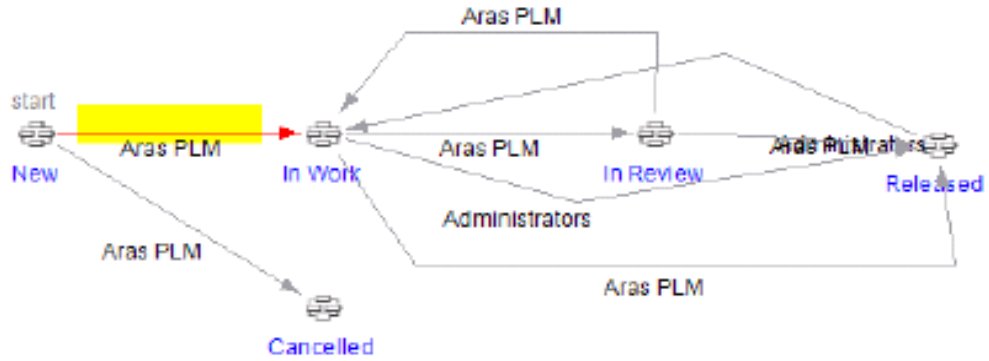
Example to trigger logic for Adhoc Workflow Assignments

Note:
For Aras innovator 11 SP5 and higher This is no longer required.

Permissions to add Adhoc Assignment are now handled by the Core !

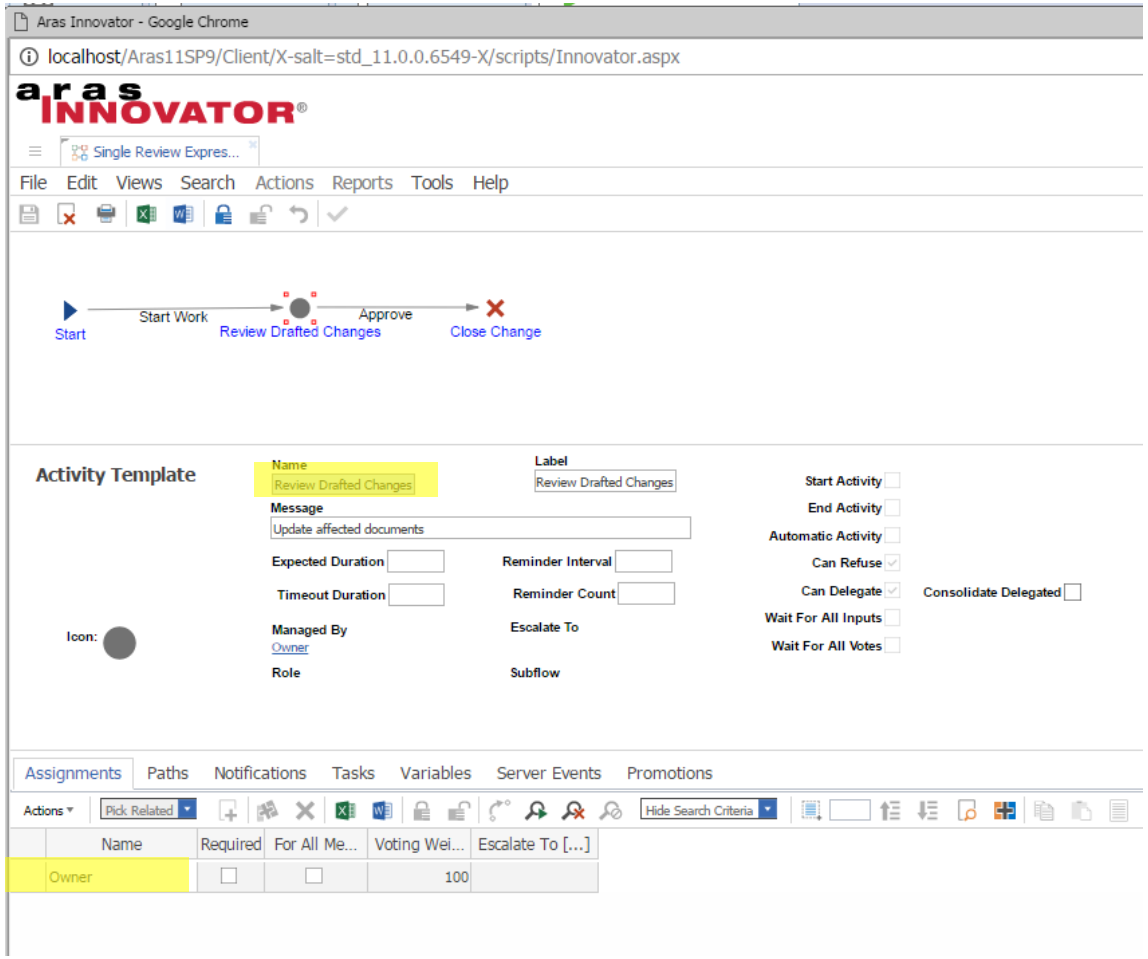


LifeCylce „Express DCO“,
Event= Post-Transition from New → In Work



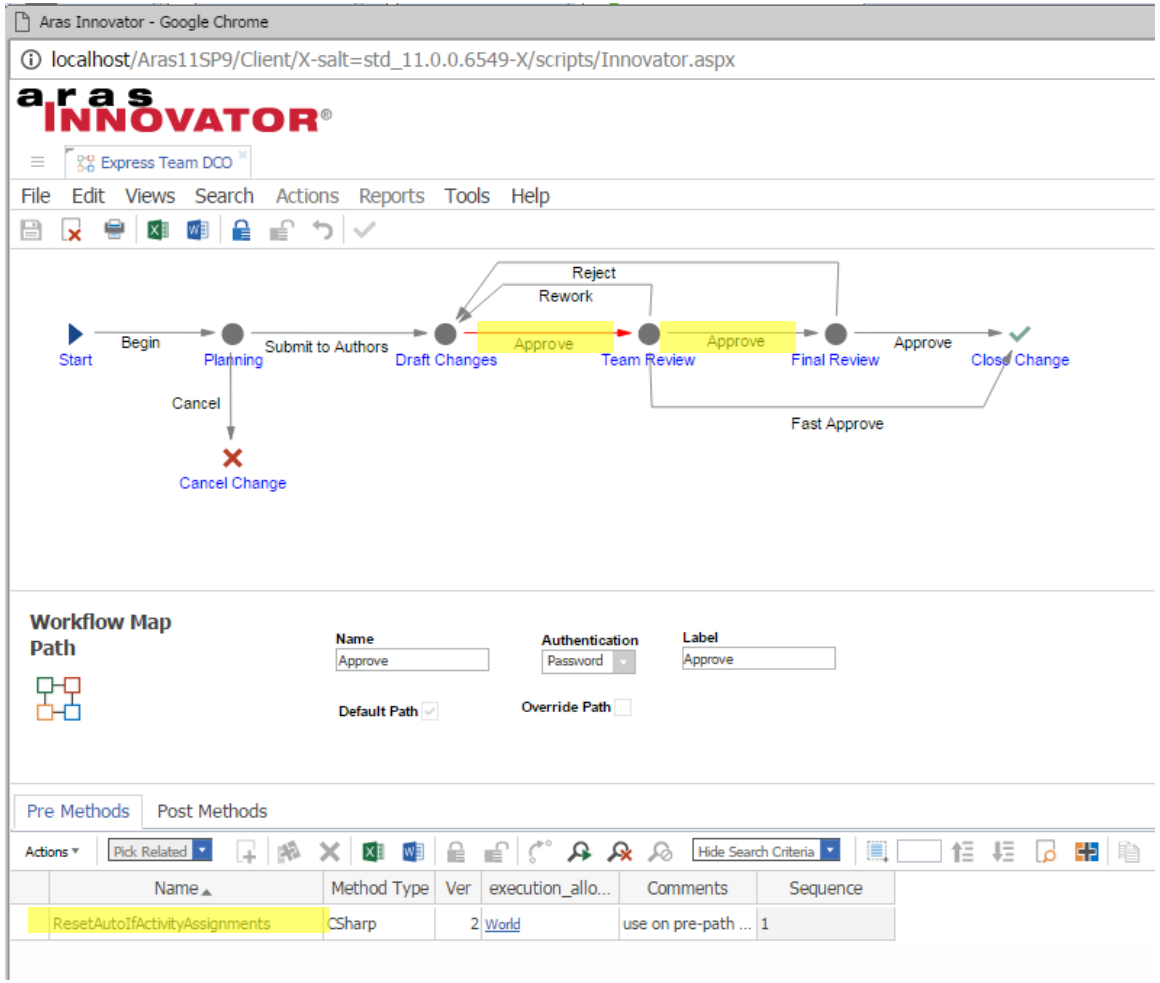
Single Review Workflow „Single Review Express DCO“

You can use this workflow instead of standard „Express DCO“ on Documents
In conjuction with adhoc workflow assigmnents the change coordinator can add an remove reviewers to/from the single Review Activity

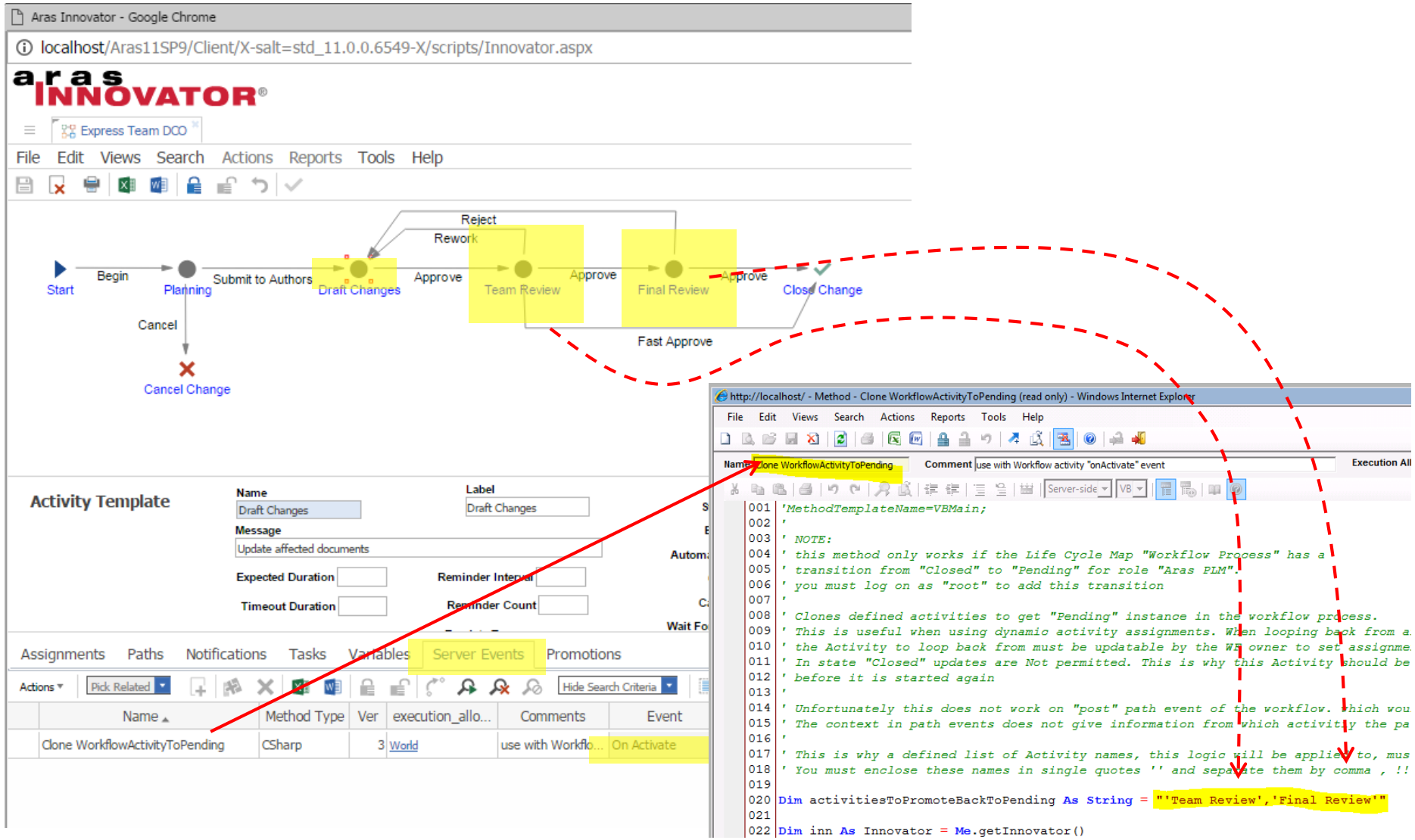


Sequential 2 Step (Team) Review Workflow „Express Team DCO“

You can use this workflow instead of standard „Express DCO“ on Documents
In conjuction with logic for automated review activities the assignments of the review steps can be empty and then the DCO will close right after „Draft Changes“



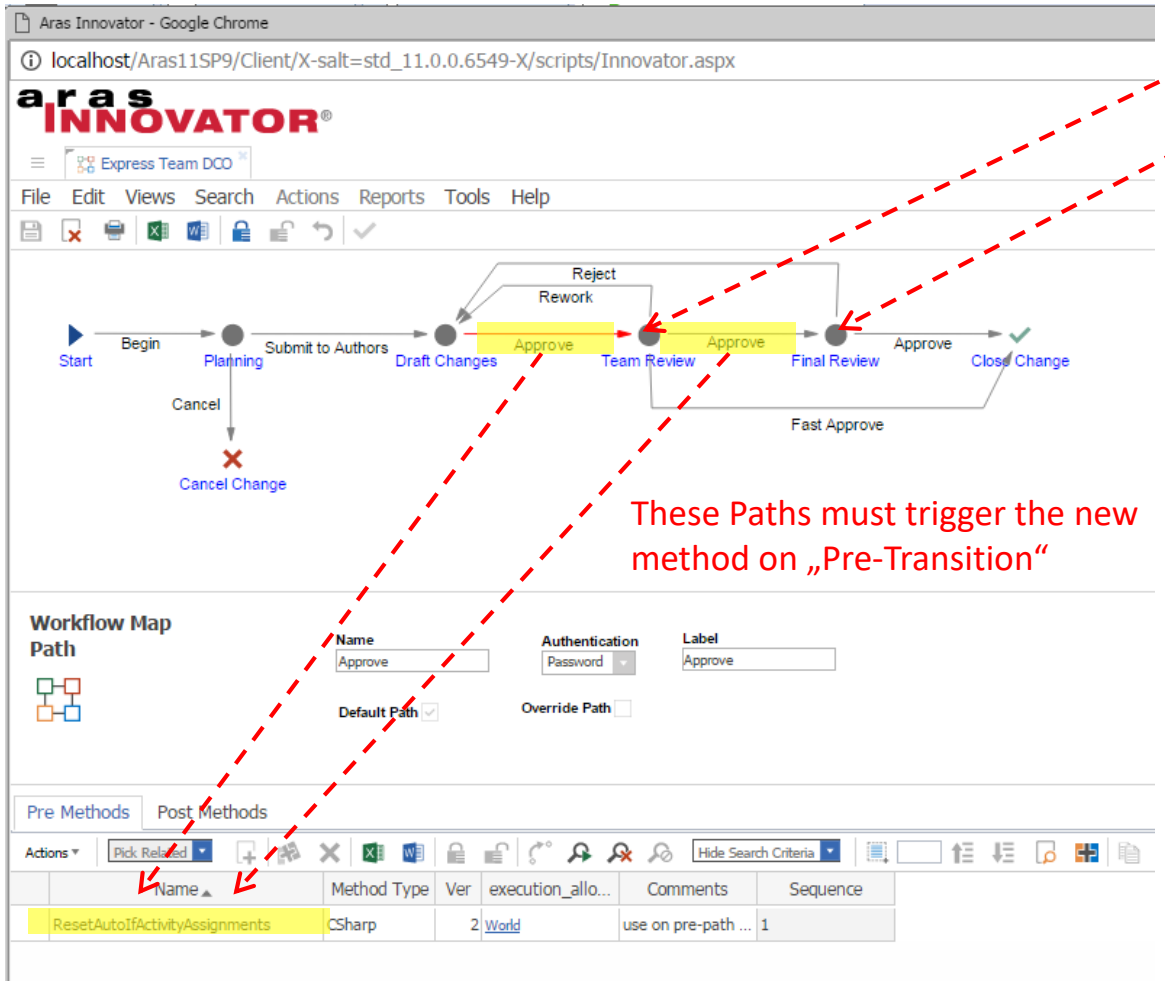
Example to trigger logic to “clone” defined other Activities from an Activity on the Workflow Map



Automate Sequential Review Activities on a Workflow

Method Name: „**ResetAutoIfActivityAssignments“**

Logic must be triggered (added) to **pre-Path Method on Workflow Map**
Example: Workflow Map „Express Team DCO“



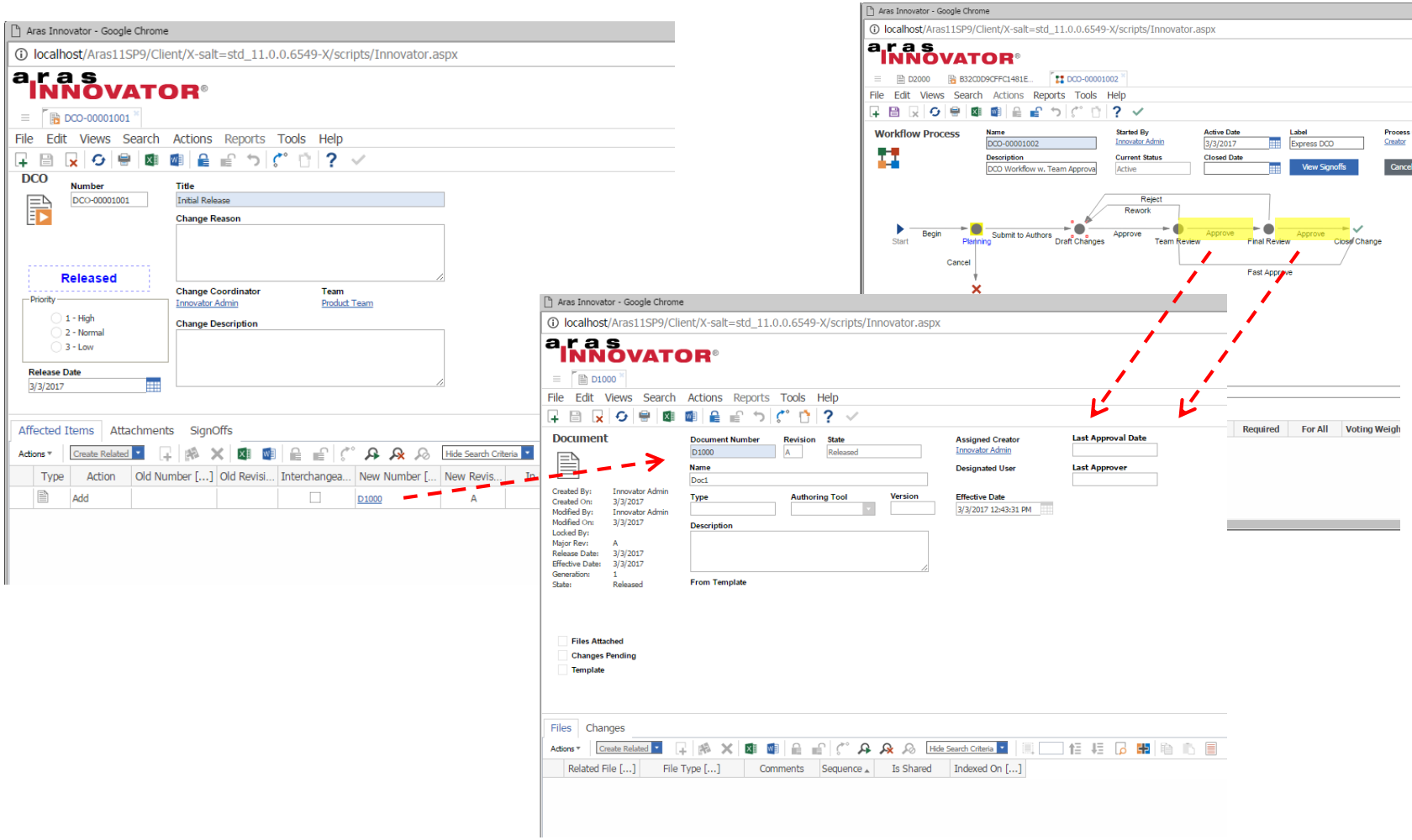
These Activities must be set to „Automatic“

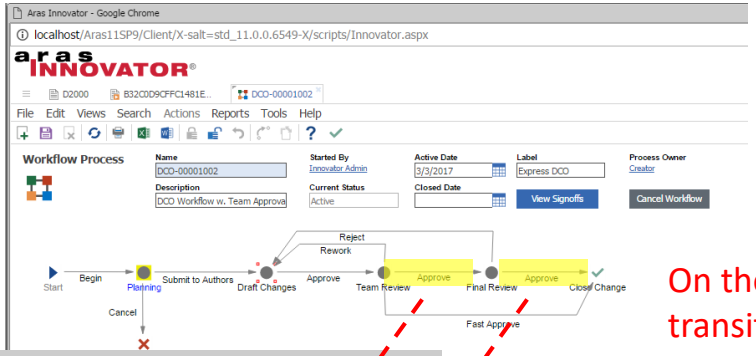
These Paths must trigger the new method on „Pre-Transition“

Save Data from Workflow to Affected Items

New Method: **„Save WFdata to AffectedItems “**

This logic is an example how data triggered from the workflow context can be written to affected items of an ECO or DCO.



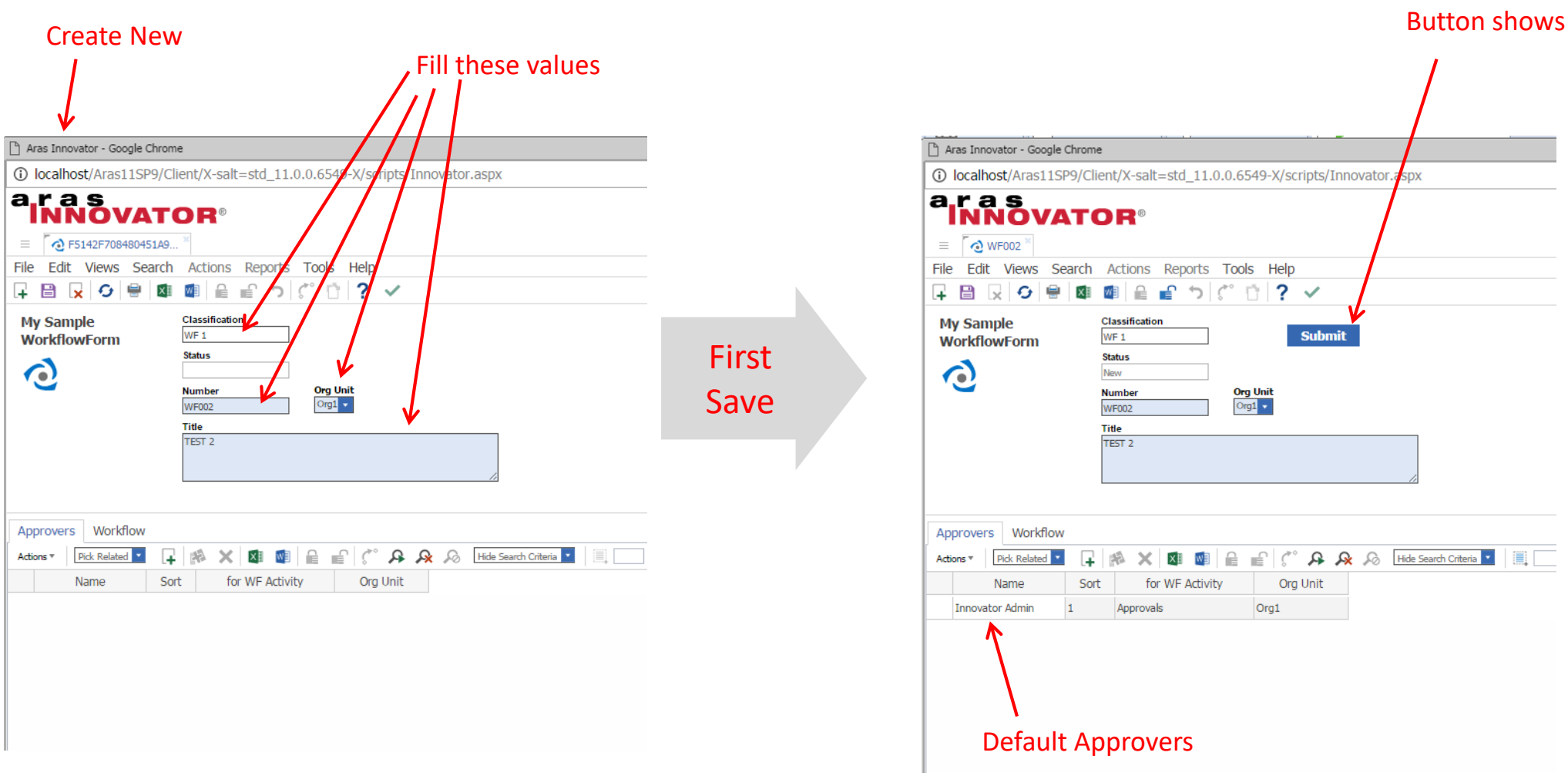


On the DCO ´s workflow these transitions will trigger this new method on „Post-Path-Event“
The method **„Save WFdata to AffectedItems”** resolves the affected Items connected to the DCO and then sets today‘s date and the current user id to the new fields on Document items (Last Approval Date, Approver)
DCO Workflow.

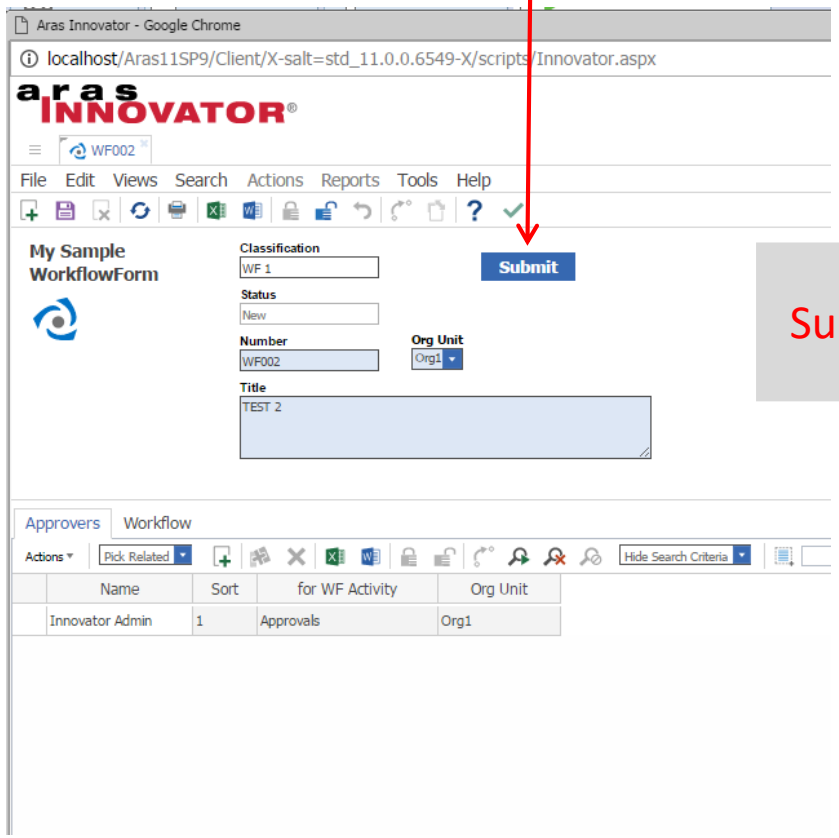
(custom) Sample Workflow Solution

with Submit Button
and Default Approver from Approver Matrix

Testing: Default Approvers

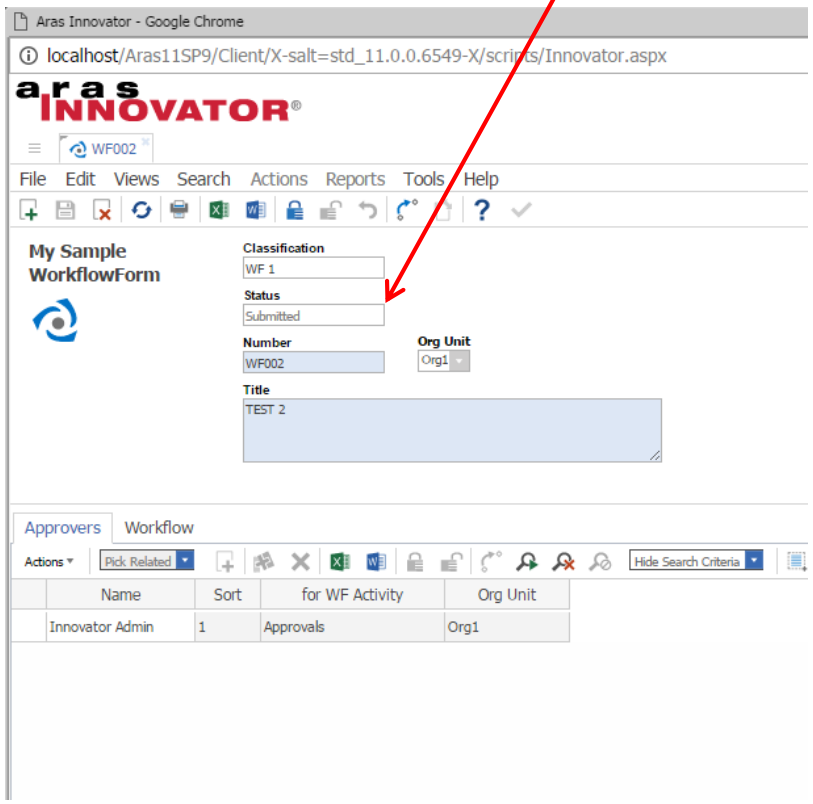


Click „Submit“

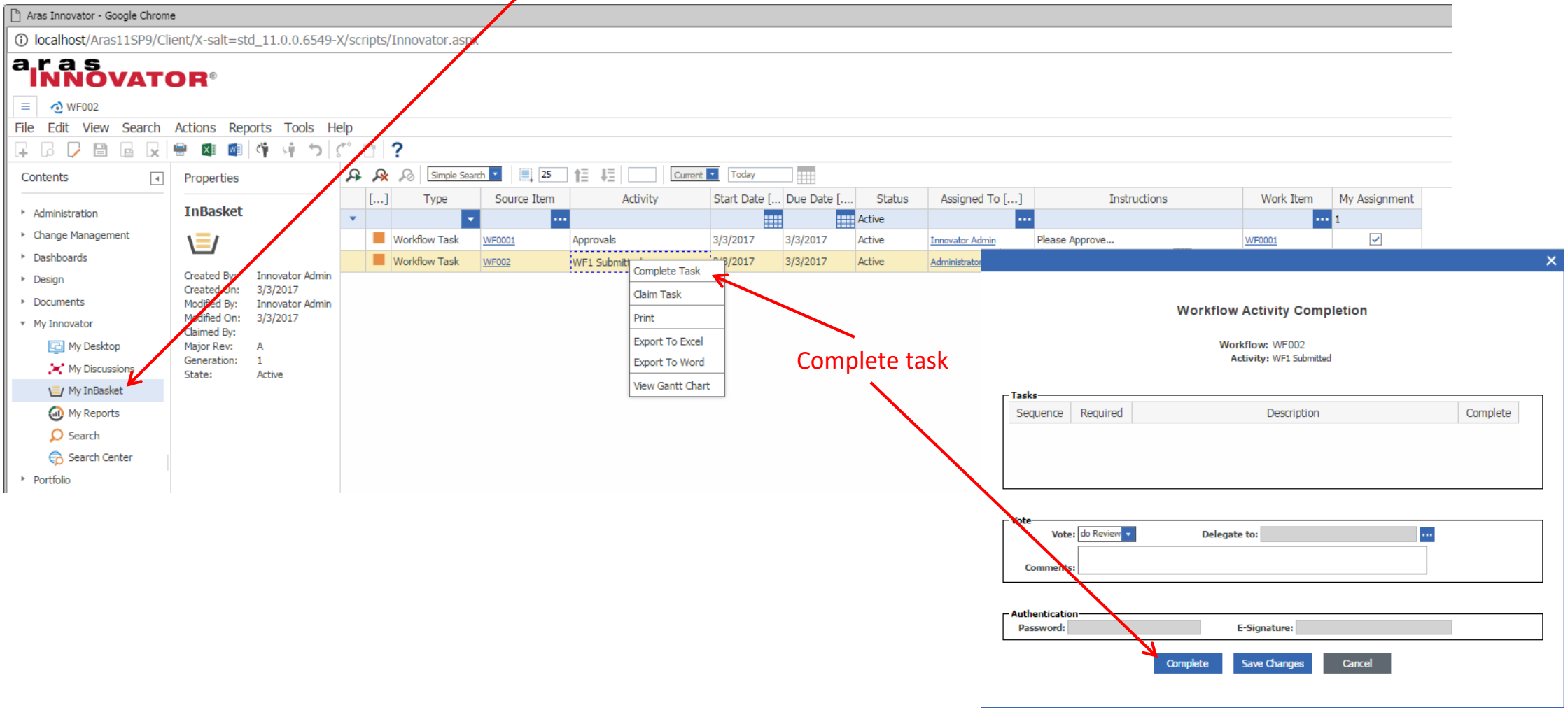


Submit

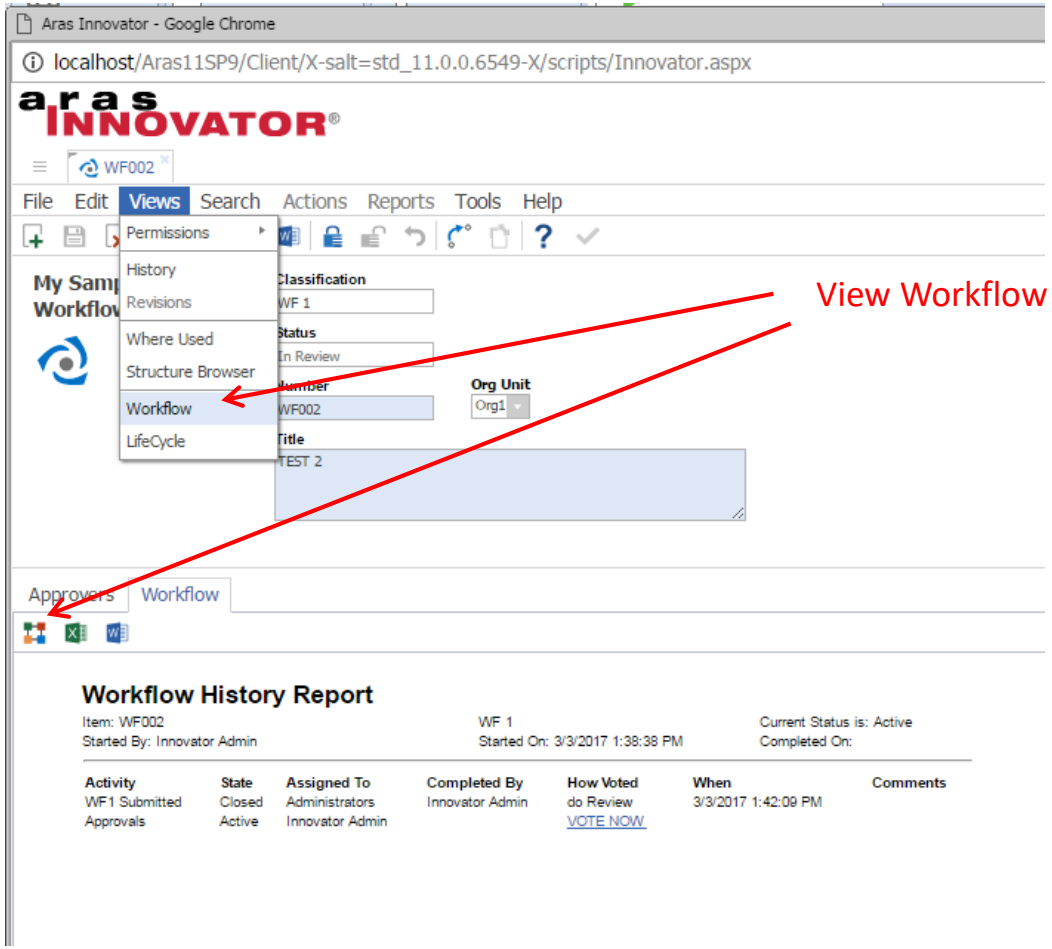
Next Status



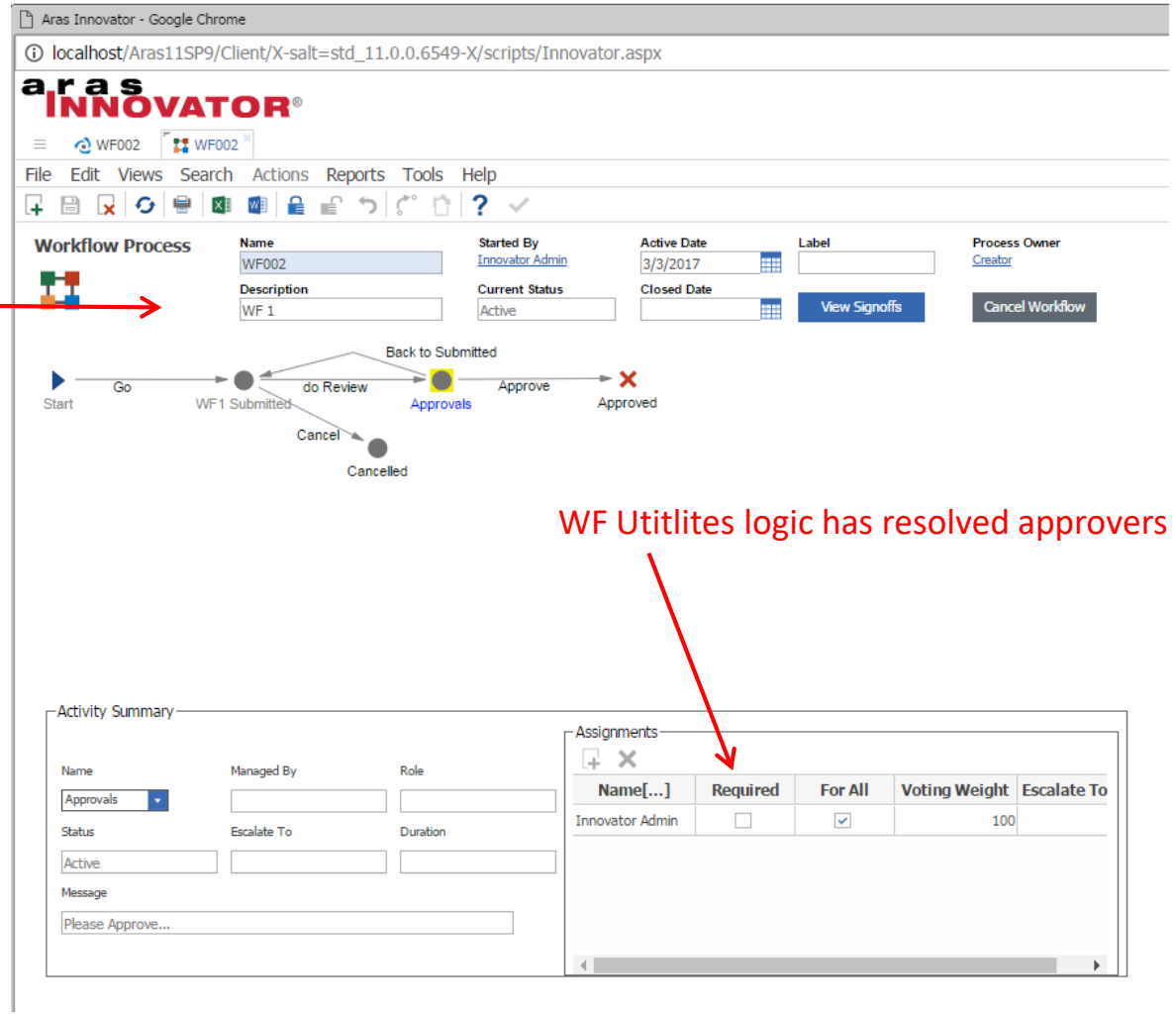
Inbaket shows WF has started



Complete task

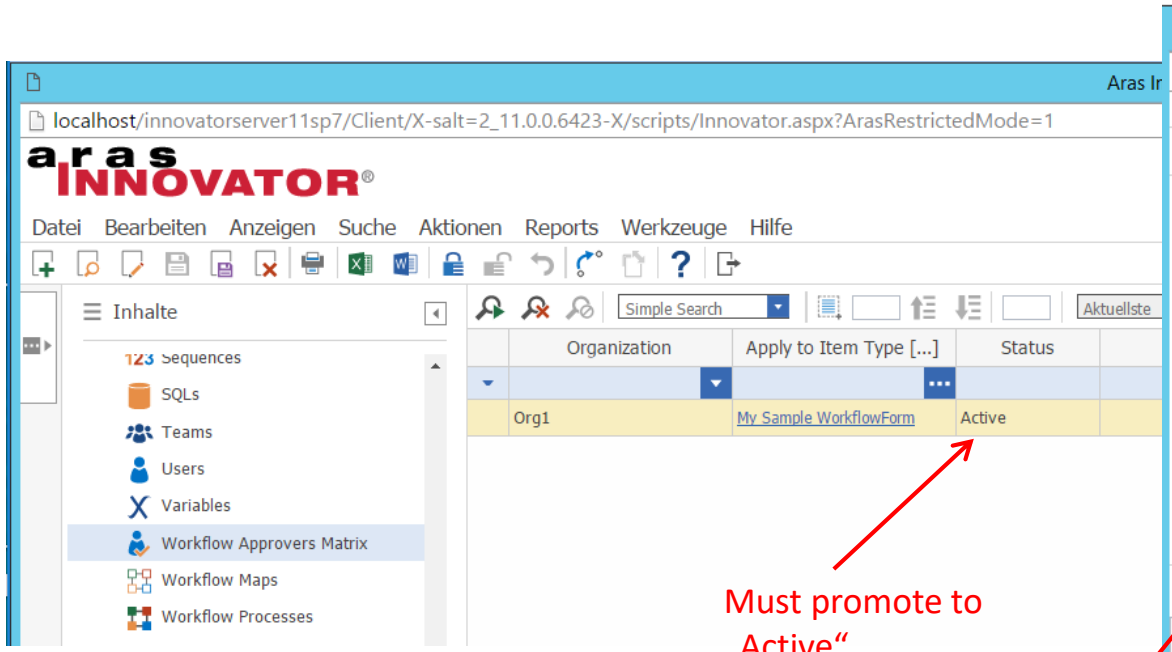


View Workflow

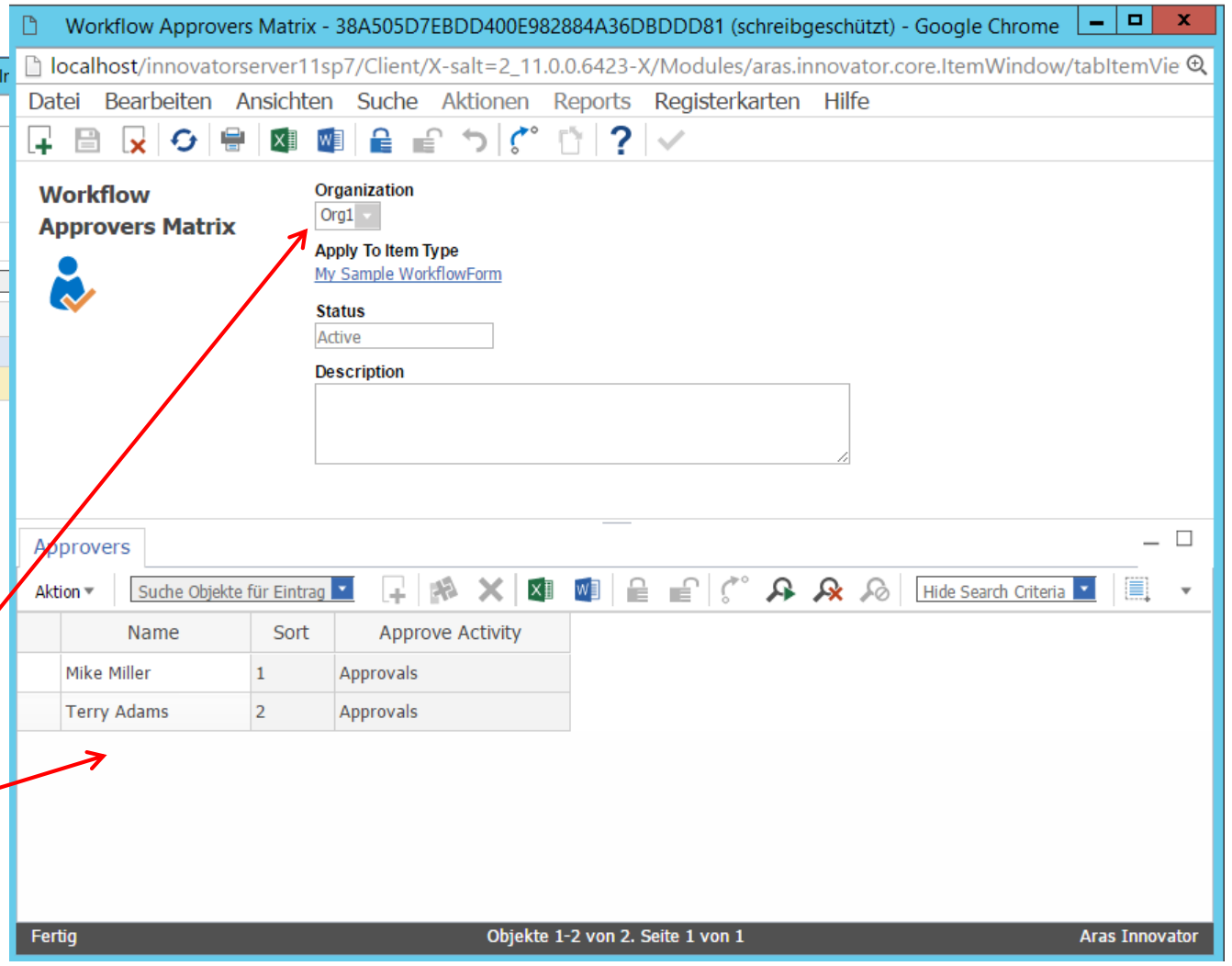


WF Utitlites logic has resolved approvers

Configuration of Approval Matrix



Must promote to „Active“



Default Approvers to be used for OrgUnit