

# Workflow Utilities

- View Workflow Process from SignOff tab
- Adhoc Workflow Assignments
- Single Review Express DCO Workflow
- Automated Sequential Review Activities, if no assignments
- Save Data from Workflow to Affected Items

# View Workflow from SignOff Tab

The image shows two overlapping browser windows from the ECO system. The left window displays the 'SignOffs' tab, which includes a 'Workflow History Report' for item ECO-00001007. The report shows a table of activities: Submit ECO (Closed), Planning (Closed), Plan Review (Closed), and Plan Review 2 (Active). A red arrow points to a new toolbar icon in the SignOffs tab, labeled 'New toolbar icon To open assigned Workflow Process'. The right window shows the 'Workflow Process' details for ECO-00001007, including a workflow graph and an 'Assignments' table. A red arrow points to the 'Assignments' table, labeled 'Modified Layout: Assignments on top of Workflow graph'.

**Workflow History Report**

Item: ECO-00001007  
Started By: Innovator Admin  
Express ECO Work  
Started On: 10/12/2011

Activity	State	Assigned To	Completed By	How Voted
Submit ECO	Closed	Innovator Admin	Innovator Admin	Submit to Plan
Planning	Closed	Innovator Admin	Innovator Admin	Submit to Plan
Plan Review	Closed	Innovator Admin	Innovator Admin	Approve Plan
Plan Review 2	Active	Innovator Admin		<a href="#">VOTE NOW</a>

**Workflow Process**

Name: ECO-00001007  
Active Date: 10/12/2011  
Label: ECO  
Process Owner: CM  
Started By: Innovator Admin  
Closed Date:   
View Signoffs  
Cancel Workflow

**Assignments**

Name	Required	For All	Voting Weight	Escalate To
Owner	<input type="checkbox"/>	<input type="checkbox"/>	100	

**Workflow Graph**

```
graph LR
    Start((Start)) --> SubmitECO[Submit ECO]
    SubmitECO --> SubmitPlanning[Submit to Planning]
    SubmitPlanning --> Planning((Planning))
    Planning --> StartWork[Start Work]
    StartWork --> DraftChanges[Draft Changes]
    DraftChanges --> ApprovePlan[Approve Plan]
    ApprovePlan --> PlanReview[Plan Review]
    PlanReview --> PlanReview2[Plan Review 2 skip]
    PlanReview2 --> SubmitReview[Submit to Review]
    SubmitReview --> ChangeReview[Change Review]
    ChangeReview --> ApproveChanges[Approve Changes]
    ApproveChanges --> CloseChange[Close Change]
    CloseChange --> End((End))
    SubmitECO --> CancelChange1[Cancel Change]
    SubmitPlanning --> CancelChange2[Cancel Change]
    DraftChanges --> Rework1[Rework]
    ApprovePlan --> Rework2[Rework]
    ChangeReview --> Rework3[Rework]
```

# Set Permissions to allow adhoc Assignments on Workflow Process

## 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.

The screenshot shows two web browser windows. The left window, titled 'ECO - ECO-00001007 (read only) - Windows Internet Explorer', displays the main form for the ECO process. The right window, titled 'Workflow Process - ECO-00001007 - Windows Internet Explorer', displays the workflow process details.

**ECO Form (Left Window):**

- Number: ECO-00001007
- Title: aaa
- Change Reason: aaa
- Change Coordinator: Innovator Admin
- Team: Product Team
- Release Date:
- Effective Date:
- Priority: 1 - High, 2 - Normal, 3 - Low
- Impact Matrix, Attachments, SignOffs
- Workflow History Report: Item: ECO-00001007, Started By: Innovator Admin, Started On: 10/12/2011
- Activity Log:

Activity	State	Assigned To	Completed By	How Voted
Submit ECO	Closed	Innovator Admin	Innovator Admin	Submit to Planning
Planning	Closed	Innovator Admin	Innovator Admin	Submit to Plan Review
Plan Review	Closed	Innovator Admin	Innovator Admin	Approve Plan
Plan Review 2	Active	Innovator Admin		<a href="#">VOTE NOW</a>

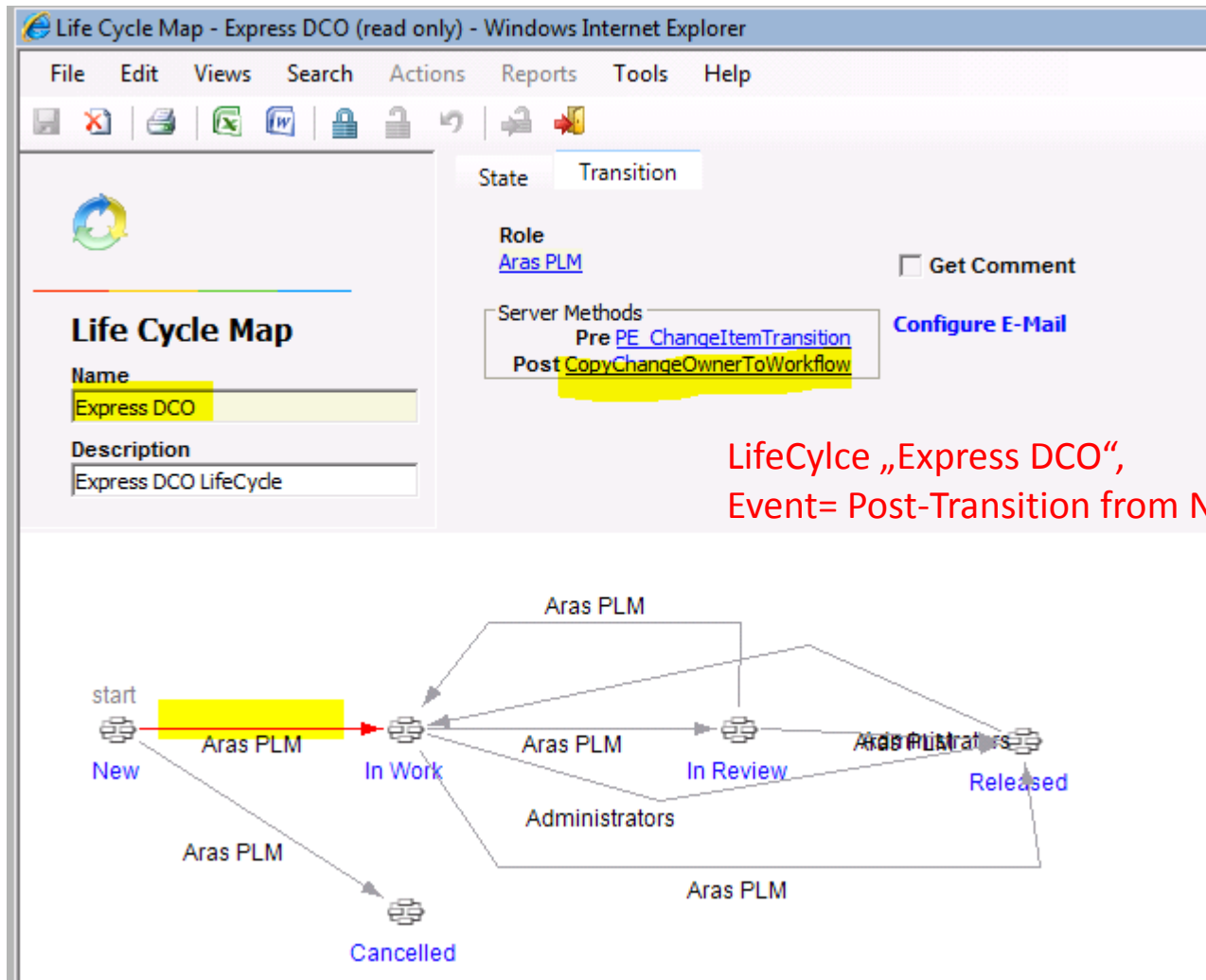
**Workflow Process Form (Right Window):**

- Name: ECO-00001007
- Active Date: 10/12/2011
- Label: ECO
- Process Owner: CM
- Started By: Innovator Admin
- Closed Date:
- View Signoffs, Cancel Workflow
- Activity Summary:

Name	Managed By	Role
Draft Changes	Innovator Admin	
- Assignments:

Name	Required	For All	Voting Weight	Escalate To
Owner	<input type="checkbox"/>	<input type="checkbox"/>	100	
- Message: Update affected parts
- Workflow Diagram: A flowchart showing the process steps: Start -> Submit ECO -> Submit to Planning -> Planning -> Start Work -> Draft Changes -> Approve Plan -> Plan Review -> Plan Review 2 -> Submit to Review -> Change Review -> Close Change. Red dashed arrows indicate the flow of information and actions between the two windows.

# Example to trigger logic for Adhoc Workflow Assignments



# Single Review Workflow

## „Single Review Express DCO“

You can use this workflow instead of standard „Express DCO“ on Documents

In conjunction with adhoc workflow assignments the change coordinator can add or remove reviewers to/from the single Review Activity

**Workflow Map - Single Review Express DCO (read only) - Windows Internet Explorer**

File Edit Views Search Actions Reports Tools Help

Start → Start Work → Review Drafted Changes → Approve → Close Change

**Activity Template**

**Name:** Review Drafted Changes  
**Label:** Review Drafted Changes  
**Message:** Update affected documents

**Expected Duration:**   
**Timeout Duration:**   
**Reminder Interval:**   
**Reminder Count:**   
**Managed By:**   
**Escalate To:**

**Start Activity:** ☐  
**End Activity:** ☐  
**Automatic Activity:** ☐  
**Can Refuse:** ☒  
**Can Delegate:** ☒  
**Consolidate Delegated:** ☐  
**Wait For All Inputs:** ☐  
**Wait For All Votes:** ☐

**Assignments** Paths Notifications Tasks Variables Server Events Promotions

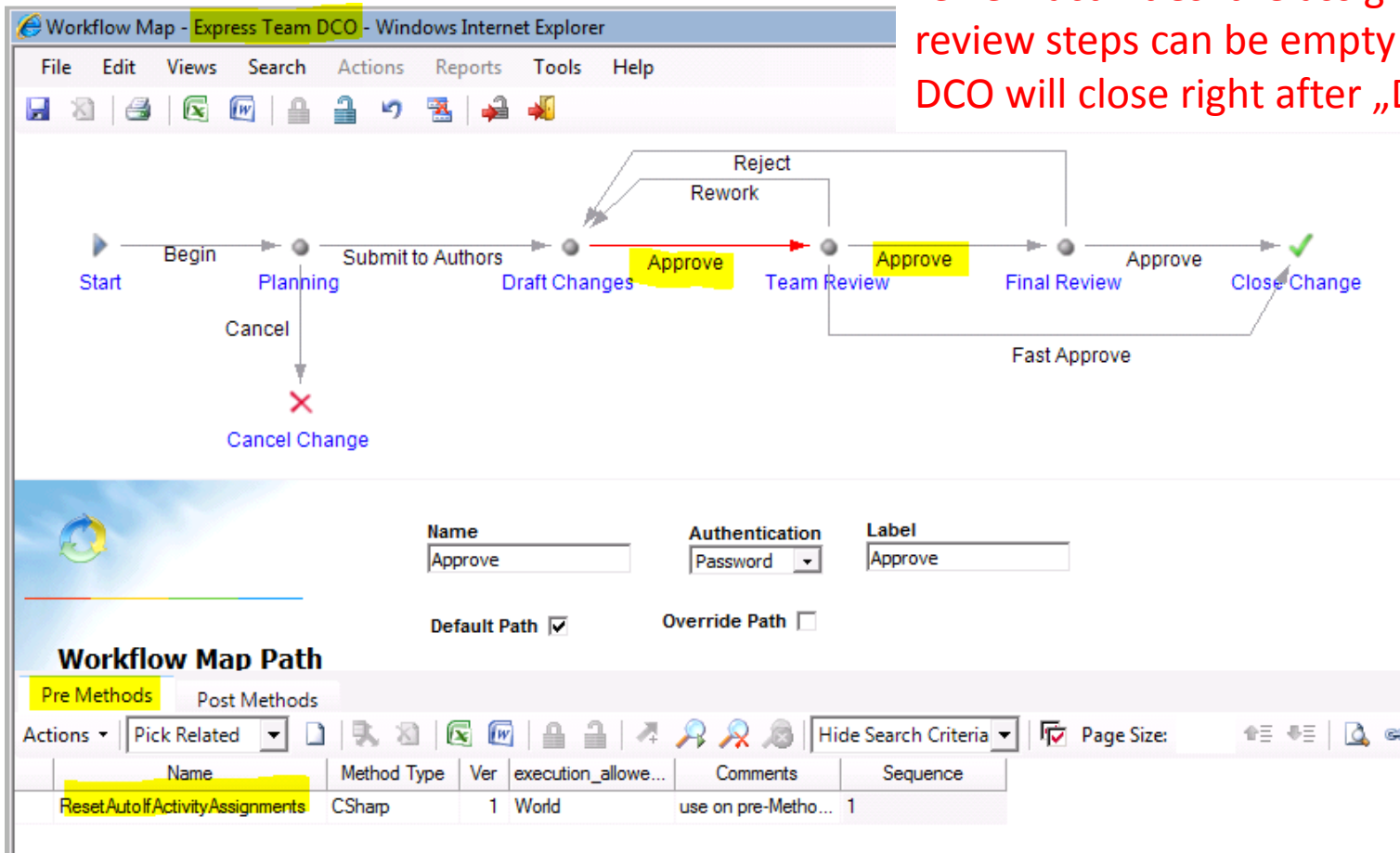
Actions ▾ Pick Related ▾

Name	Required	For All Memb...	Voting Weight	Escalate To [...]
Owner	<input type="checkbox"/>	<input type="checkbox"/>	100	

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

You can use this workflow instead of standard „Express DCO“ on Documents

In conjunction 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“

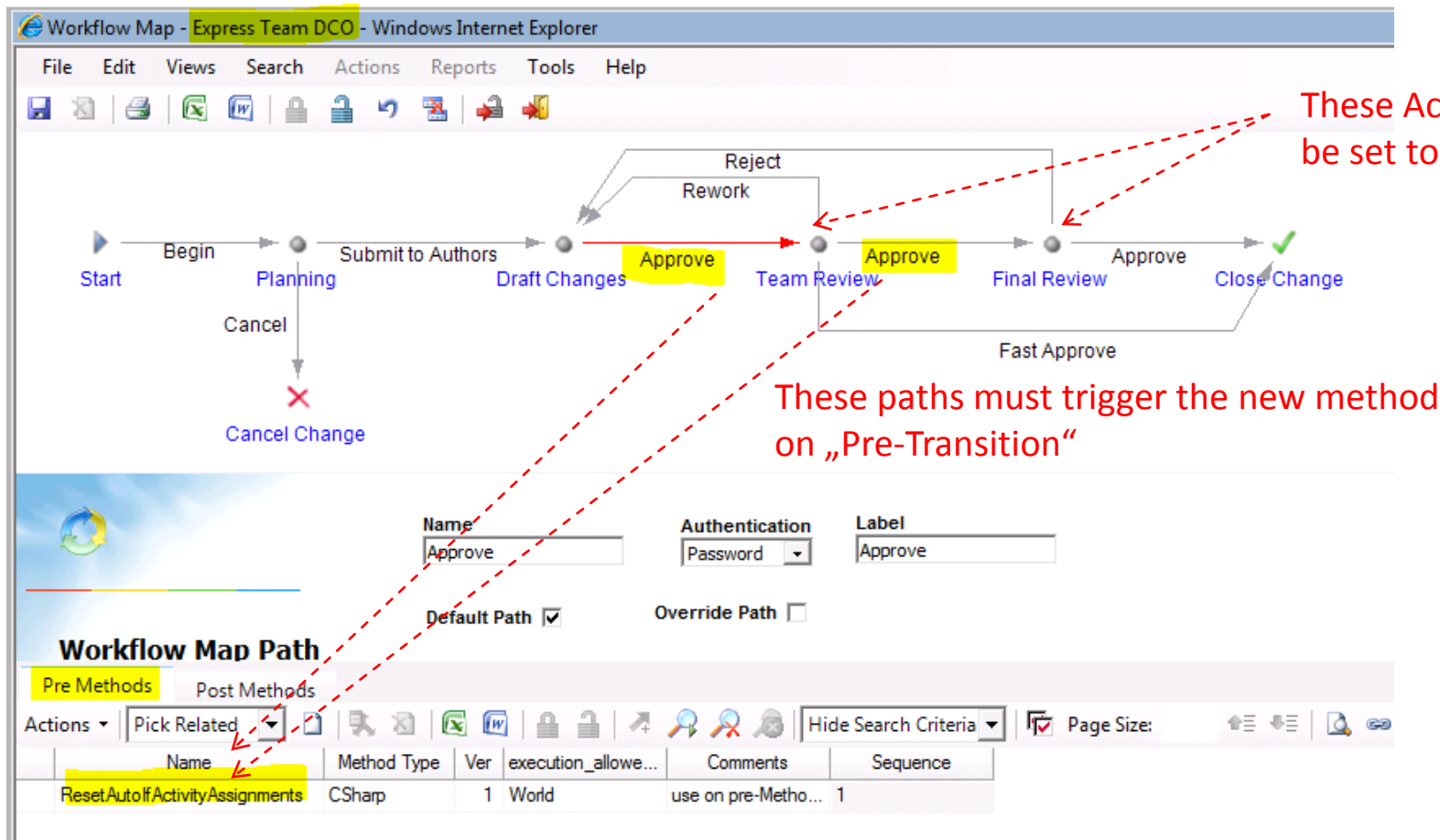


# Automate Sequential Review Activities on a Workflow

Method Name: „**ResetAutoIfActivityAssignments**“

Logic must be triggered (added) to **pre-Path Method** on Workflow Map

Example: Workflow Map „Express Team DCO“

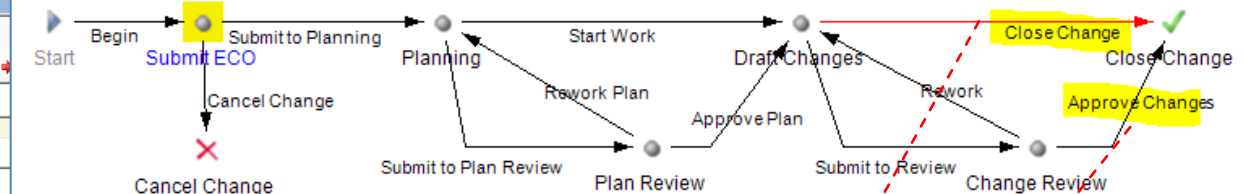


# Save Data from Workflow to Affected Items

## 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.

### ECO Workflow



ECO - ECO-00001001 - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Number: ECO-00001001

Title: Release

Change Reason:

ECO

New

Priority:

- ☐ 1 - High
- ☐ 2 - Normal
- ☐ 3 - Low

Change Coordinator: Innovator Admin

Team: Product Team

Release Date:

Effective Date:

Impact Matrix Attachments SignOffs

Part Number	Name	Revision	State	Sequence	Quantity	Unit	Item Action	Nr
P1000	Part 1							

Part - P1000 (read only) - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Part Number: P1000

Revision: A

State: Preliminary

Name: Part 1

Type: EA

Unit: EA

Make / Buy: Make

Cost:

Effective Date:

Long Description:

Created By: Innovator Admin

Created On: 10/23/2011

Modified By: Innovator Admin

Modified On: 10/23/2011

Locked By:

Major Rev: A

Release Date:

Effective Date:

Generation: 1

State: Preliminary

☐ Changes Pending

Assigned Creator: Innovator Admin

Designated User:

Last Approval Date:

Approver:

On the ECO's workflow these transitions will trigger this new method on „Post-Transaction“

The method resolves the affected Items (Impact Matrix) connected to the ECO and then sets today's date and the current user id to the new fields on Part items (Last Approval Date, Approver)



# Save Data from Workflow to Affected Items

## Configuration Details – Workflow Example: „Express ECO“

Workflow Map - Express ECO (read only) - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Workflow Map Path

Name: Close Change Authentication: Password Label: Close Change

Default Path ☐ Override Path ☐

Pre Methods Post Methods

Actions ▾ Pick Related ▾ Hide Search Criteria ▾ Page Size: ▾

Name	Method Type	Ver	execution_allowe...	Comments	Sequence
Save WFdata to AffectedItems	VB	1	<a href="#">World</a>	sample method - ...	1