Active Workspace 6.0

Workflows and Tasks

Active Workspace 6.0
AW033 - 6.0

SIEMENS

About Siemens Digital Industries Software

Siemens Digital Industries Software is a leading global provider of product life cycle management (PLM) software and services with 7 million licensed seats and 71,000 customers worldwide. Headquartered in Plano, Texas, Siemens Digital Industries Software works collaboratively with companies to deliver open solutions that help them turn more ideas into successful products. For more information on Siemens Digital Industries Software products and services, visit **www.siemens.com/plm**.

Support Center: **support.sw.siemens.com**

Send Feedback on Documentation: **support.sw.siemens.com/doc_feedback_form**

Contents

1. Overview of workflows and tasks in Active Workspace

What are workflows and tasks?

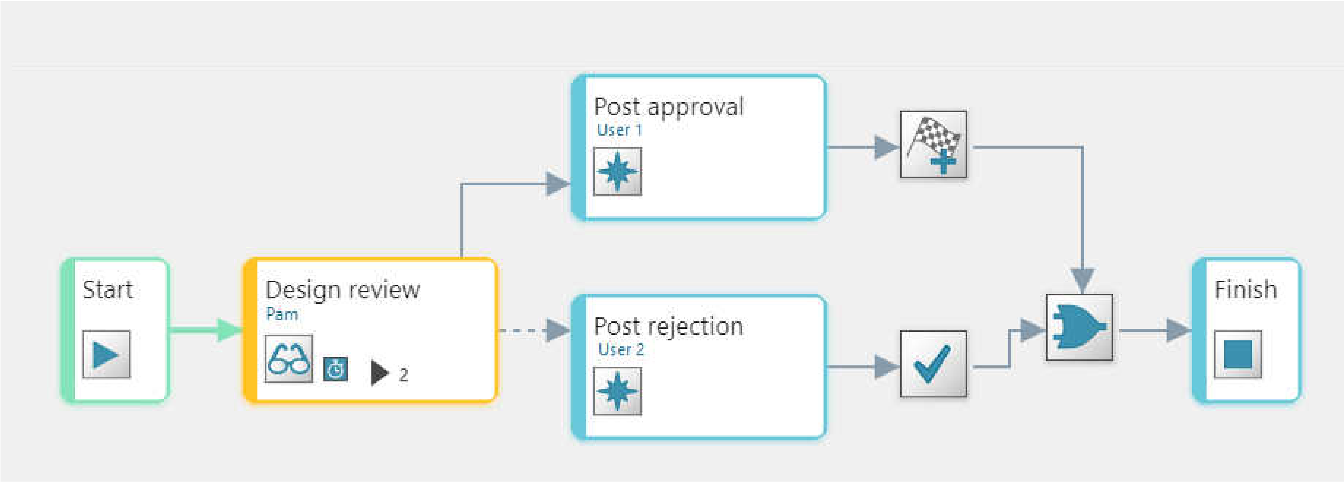
In Active Workspace, workflows and tasks streamline a business process to accomplish an objective. Working together, workflows and tasks ensure that no steps in a process are missed, that the steps progress in the right order, and that the correct things happen after all of the steps are completed.

Workflows are used to circulate objects for review by owners, approvers, and impacted parties. Business users can submit an object to a pre-defined template to initiate a workflow that incorporates and automates your company's business practices.

A *task* is an activity in a workflow that needs to be accomplished within a defined period of time to work towards a specific goal. Tasks are sent automatically to the responsible participant's **Inbox** so users are notified of the specific actions that they need to complete at the right time.

Active Workspace provides complete control and visibility of your workflows. You can view any initiated workflow and its tasks (whether it is currently in process or has already completed), perform or reassign tasks, override task actions, view workflow reports, and so on. Workflows work with most Active Workspace objects, so various solutions can make use of them.

This example shows a workflow in which an object is sent through a design review. Depending on the outcome of the review, one of two tasks is then required (**Post approval** or **Post rejection**), as indicated by the **Or** task. When the **Post approval** task completes, the object is granted a **Released** status (indicated by the **Add Status** task) and the workflow finishes. If the design not approved and the **Post rejection** task completes, an email is sent to the specified parties relaying that information (indicated by the task) and the workflow finishes.



You can use workflows in Active Workspace to manage your processes and changes in many applications, some of which are shown here.

Where do I go from here?

The following table shows the high-level roles that engage workflows and tasks.

Business User	Business users in Active Workspace can initiate or participate in workflows.
Who can contribute to workflows?	Workflow participants
Get me started with starting a workflow	Start a workflow
Where and how to assign users to tasks	Assign users to tasks
Where and how to view tasks	View workflow tasks
Complete a task	Sign off on a task Perform a Do task Perform a Form task
View workflow progress	Workflow reports
Administrator	An **Administrator**, or a workflow template designer, is the only user who can create, modify, delete, import, or export existing templates in the **Workflow Designer**. These templates are then made available to the **Business User** to apply to objects and create workflows, as described in **Workflows and Tasks**. See the Workflow Designer Guide for more information.

Task examples

All tasks in a workflow are sent automatically to the responsible participant's inbox.

The following are examples of three different types of tasks:

Task	Description
Select a signoff team	A task to select the team to review the target of the workflow and indicate approval. Once you complete the **select-signoff-team** task, the **perform-signoffs** tasks are generated for each reviewer.

Task	Description
	The **select-signoff-team** task is often the first task in a workflow; the user who initiated the workflow performs this task.
Do task	A task that **provides instructions for you to follow**, for example, a task to validate a change.
Sign off task	A task to **review and approve an object**, such as a document or change. The perform-signoffs task appears in each member of the signoff team's inbox. Each member of the signoff team is responsible for reviewing the target object and indicating a decision.

When an object, such as a part, item revision, or document is assigned a release status during the workflow process, a status indicator icon displays on the object in various object views, such as the **List with Summary** view, **List** view, or **Images** view. A release status can be a default Teamcenter release status (**Released**), or it can be a custom release status defined by your organization. A list of all release statuses assigned to the object is displayed in a separate line when you hover over the release icon.

2. Submitting part data and documents to workflows

Workflow participants

Workflow participant roles include the *initiator*, also known as the workflow owner, and one or more *responsible parties*.

A workflow *initiator* is a user who initiates a workflow.

Whenever any task in the workflow is not explicitly assigned to another user, person, or resource pool, responsibility for the task defaults to the workflow owner.

As a user, you can:

- Complete a task.
  Instructions associated with the task describe the work to be done.

- Reassign a task.
  Reassigning a task transfers ownership of the selected task to the selected user and makes that user the responsible party for the task.

  > Note:
  >
  > Reassigning a task transfers your signoff responsibility.

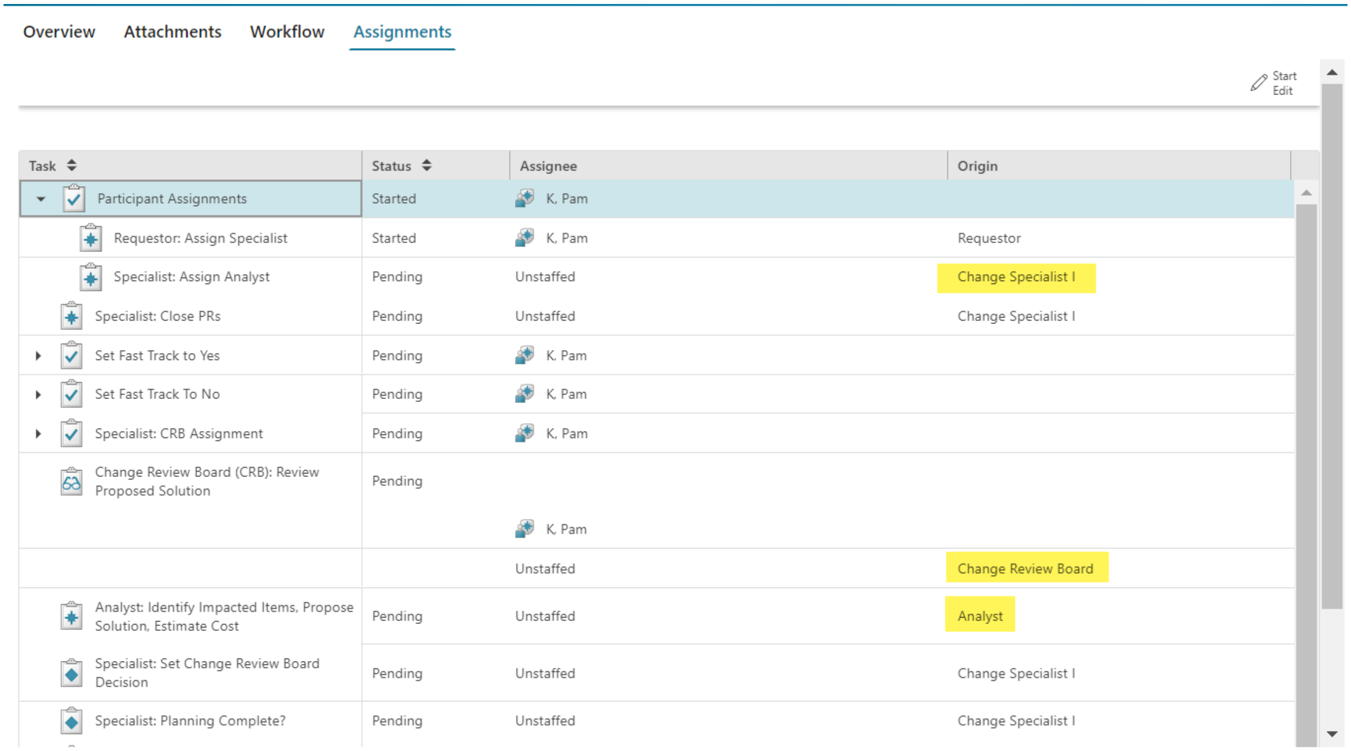
- Delegate your signoff responsibility for a **perform-signoffs** subtask to another user.
  If you are selected to a signoff team based on your inclusion under a signoff profile, you can only delegate the **perform-signoffs** subtask to another user who can match your signoff profile group and role. Otherwise, you can delegate the **perform-signoffs** subtask to any other user.

Dynamic participants

What are dynamic participants?

Dynamic participants are automatically assigned staffing roles that perform different workflow tasks. They are assigned by attributes on an item revision or problem report revision (or a subclass of a revision) and are delivered out of the box or defined in BMIDE. These are then display as a specific user category required for a task.

These tasks are based on the participant types assigned to an object that has been submitted to a workflow. In the following example, a problem report includes the profiles **Change Specialist**, **Change Review Board**, and **Analyst** which can then be assigned to different users. Dynamic participants are helpful if you have a workflow that you want to reuse for multiple purposes.



A workflow, configured for dynamic participants in Workflow Designer, reaches a task and determines the participants. It identifies the current assignee for the participant type (for example, **Reviewer** for a **Review** task) and sends it to that user's inbox.

If a user assigned to a participant type changes after the workflow starts, the workflow automatically recognizes the new user for any tasks that have not started.

If a workflow is not configured for dynamic participants, the participants are determined by explicitly selecting users. You can also assign users or resource pools, rather than an individual. By default, the owning project is selected.

> Note:
>
> The **Select Participants from Workflow** attribute option must be enabled on a workflow template in Workflow Designer for process-based dynamic participants.

Add dynamic participants

There are multiple ways to assign dynamic participants to an object. They can be assigned before and after submitting a workflow process.

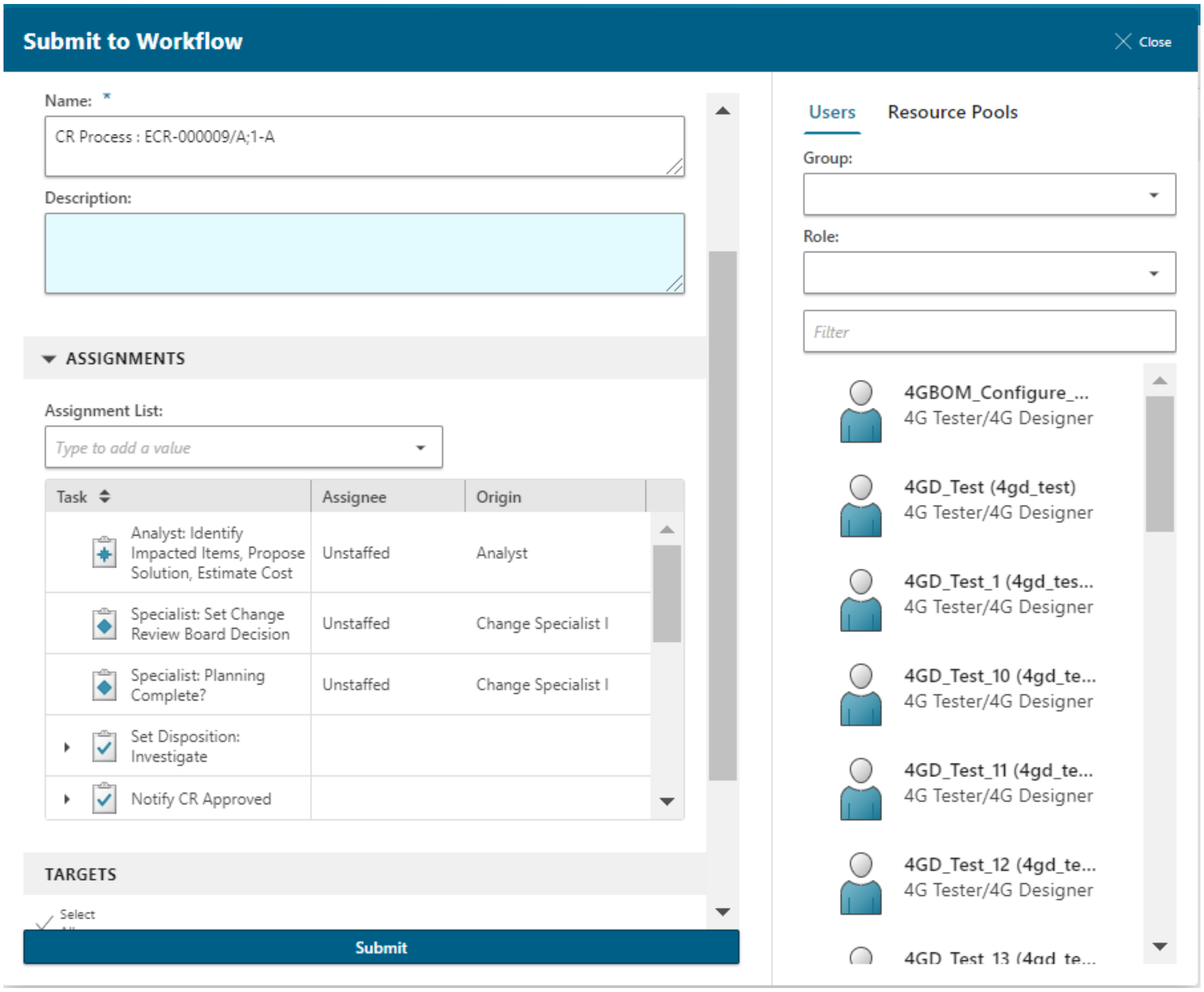
> Note:
>
> Dynamic participants are only displayed in a table format that enables drag-and-drop functionality for Active Workspace 5.1 combined with Teamcenter 13.1.

Submit to a workflow or subworkflow

When you submit an object to a workflow (or subworkflow), you can assign dynamic participants to the object if the template is configured for them.

In the **Submit to Workflow** dialog box, under the **Assignments** category, the **Assignee** column indicates the dynamic participants that need to be assigned. Click the task to assign user or resource pools to the task.

For example, this task requires an **Analyst** and **Change Specialists**.



See **Start a workflow** and **Start an ad hoc subworkflow** for detailed instructions.

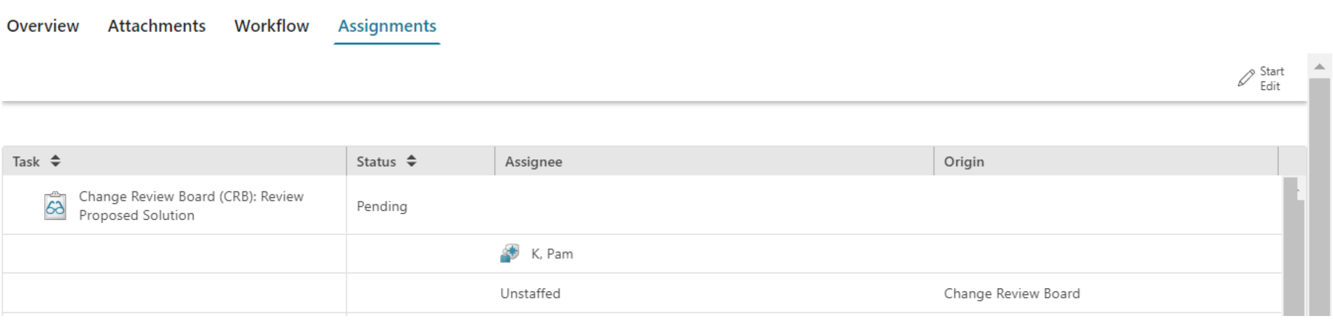
Upcoming Tasks table

The **Upcoming Tasks** table on the **Workflow** tab shows upcoming pending and unassigned tasks in the workflow or subworkflow, including those that use dynamic participants. Click a task to assign a user or resource pools to the task. For example, this task requires an **Analyst** as the Assignee.

See Assign users to tasks for more information.

Assignments tab

The task table on the **Assignments** tab displays all the tasks in a workflow or subworkflow, including those that use dynamic participants. Click a task to assign a user or resource pools to the task.



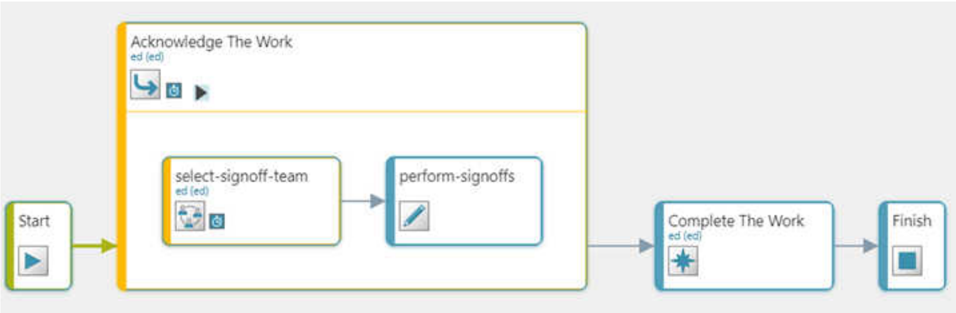
For example, this task requires a **Change Review Board**.

See Assign users to tasks for detailed instructions.

Start a workflow

Submit to workflow

Submitting content to a workflow sends it through a series of required tasks, such as approvals (signoffs) and reviews, similar to the one shown in the following steps.



Your administrator can configure which workspace objects are available for **Submit to Workflow**. Setting the business object Boolean constant **Awp0WorkflowSubmittable** to **true** enables objects to be submitted (in conjuncture with the condition **Awp0NewWorkflowProcessCommand**). For details, refer to Configure Workflow Designer using the Business Modeler IDE.

Your administrator can assign default workflows for various target object types, such as change requests or problem reports (see Configure a default workflow template for an object for more details). Newly created change objects with an assigned workflow are automatically submitted to the workflow on creation.

In some cases, a user might want to add a specific target object(s) to an active workflow even though the corresponding workflow template is configured not to allow it. In that instance, an administrator can set the preference **WRKFLW_allow_adding_target_behavior** to override that restriction so that the target object(s) can be added to the active workflow by a user. This preference can have the following value:

- **0** - allows a specific target object(s) which satisfies the **fnd0FilterCondition** condition when the value of **CR_allow_alternate_procedures** preference is set to **none**.

- **1** - allows any target object(s). This is the default value.

The tasks initiated by the workflow are sent to the recipients that perform the tasks. Depending on how the workflow is set up, the recipients may also receive email notifications.

> Note:
>
> When you create a change, you can automatically send the change through a workflow.

Submit a target object to a workflow

Do the following to submit a target to a workflow:

1. Select the data you want to submit to the new workflow.

   Select individual or multiple objects to submit.

2. Click **Manage** > **Submit to Workflow** on the primary toolbar.

3. In the **Submit to Workflow** panel, select a template from the **Template** list.

   If a default workflow exists for the content type, it is automatically specified as the workflow template.

   The **All** option displays all templates in the system. The template list is not case-sensitive. **Assigned** only displays templates that match specific criteria set by your administrator. The visibility of templates is managed with the **CR_allow_alternate_procedures** preference.

4. At this point, you can click **Submit** and the workflow is started. To make additional specifications to the workflow, continue with the procedure.

5. Accept the default workflow name or enter your own.

   Names are formatted as *Workflow template name : First target Name*.

6. Enter a description for the new workflow.

7. Click **Assignments** if you want to assign or replace users or resource pools to the workflow.

   The **Assignments** area can vary in appearance according to what is required of the template.

   A table displays the task name, **Assignee**, and **Origin** columns. **Origin** specifies the source of the assignment (whether it came from an assignment list, project, dynamic participant, or resource pool). An asterisk is displayed next to any unstaffed profiles. Right-click and select **Remove** to delete any assignments.

   > Note:
   >
   > The **Origin** column only appears in Active Workspace 5.1 and Teamcenter 13.1.

   The panel expands to the right to display assignees and reviewers that you can assign to the task.

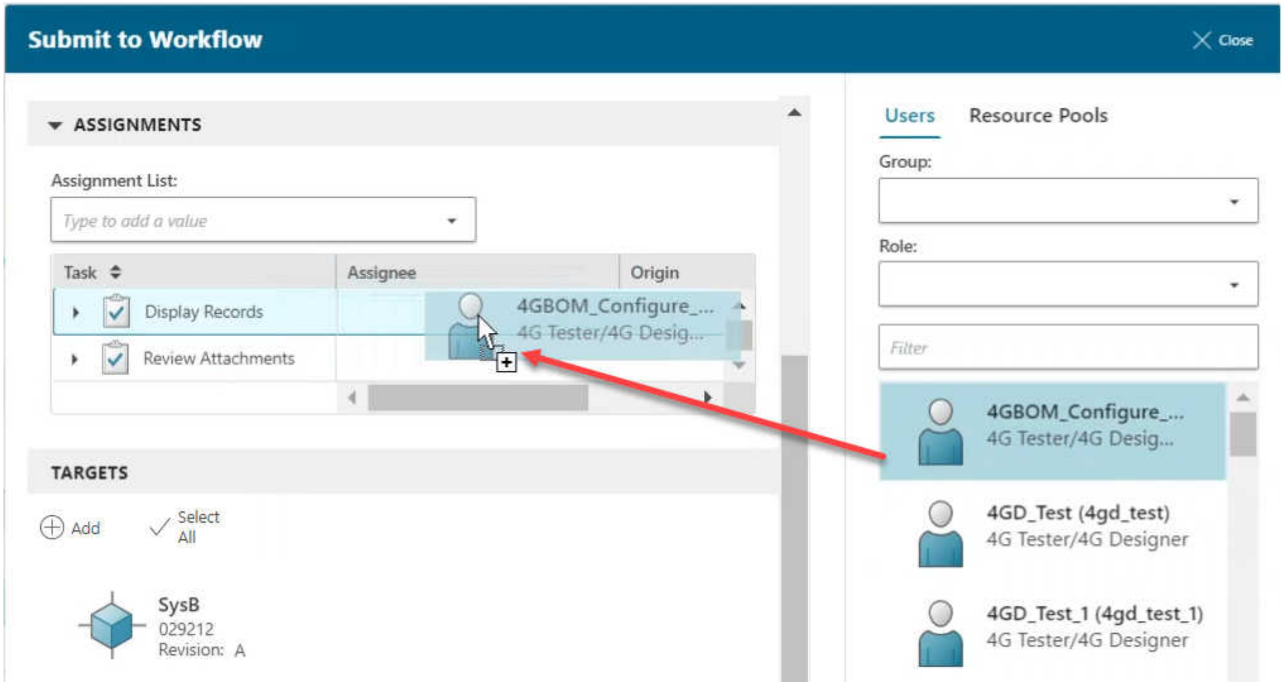
8. Select an **Assignment List**(s), if any exist for the template. The list is displayed only when lists are available to choose from.

   The assignments applied to the list(s) are displayed in the task table.

9. In the right-hand panel, you can specify a project to filter by (if the target object is assigned to a project of which you are a member). Specify users for the task by **Group** or **Role**, as necessary. Enter a name in the text box to filter.

   Click **Resource Pools** to filter for and add a predefined team.

10. Select a user or resource pool for the task and drag it to the **Assignee** column of the task table.

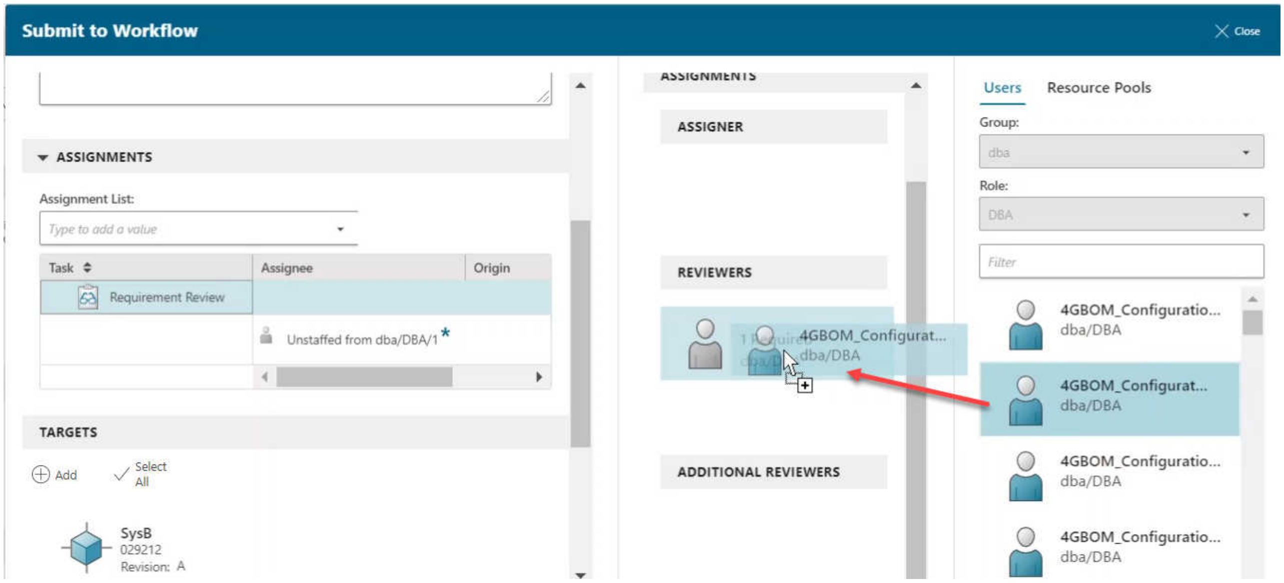


If you drag a user or a resource pool to a task in the table that contains a profile, this user or resource pool is added as an additional reviewer.

Click a specific task in the table to display the middle **Assignments** category area. Drag a user or resource pool to a specific role.

For the **Review** task, if a signoff profile is required, click the profile requirement icon so it is highlighted, then drag a user or resource pool *directly over* the icon. If the icon is *not* selected when you drag and drop, the user or resource group is added as an additional reviewer.

For example, in this workflow, one user from the **dba/DBA** group/role is required as a reviewer.



You can also select a user or resource pool, and then click **Assign** in the **Assignments** panel. Select a user or resource pool to display the **Remove** button to remove a user or resource pool from an assignment.

Click **Modify**.

11. Objects submitted to the workflow are displayed in the **Targets** section of the panel. To add an additional target objects(s), click **Add** ⊕. Any type of object can be added to a workflow, as there are no template restrictions.

    The panel expands, and objects recently pasted to your clipboard are located under the **Palette** tab, as well as any favorites and your most recently-used items. Click the **Search** tab to filter for an object through a search. Once an object(s) is selected, click **Add**.

    To remove a target object(s) from a workflow, select a target and click **Cut**. **Select All** ✓ highlights every object, while **Clear Selections** ✓ deselects the objects.

12. To add a reference, click **Add** ⊕. The panel expands, and references recently pasted to your clipboard are located under the **Palette** tab, as well as any favorites and your most recently-used items. Click the **Search** tab to filter for a reference through a search. Once a reference(s) is selected, click **Add**.

    To remove a reference(s) from a workflow, select a reference and click **Cut**. **Select All** ✓ highlights every reference object, while **Clear Selections** ✓ deselects the reference objects.

13. Click **Submit**.

Submit a workflow without a target object

Do the following to start a workflow without a target:

1. From your **Inbox**, click **New** and **Create Workflow** from the primary toolbar.

2. In the **Create Workflow** panel, select a template from the **Template** list.

   If a default workflow exists for the content type, it is automatically specified as the workflow template.

3. At this point, you can click **Submit** and the workflow is started. To make additional specifications to the workflow, continue with the procedure.

4. Accept the default workflow name or enter your own.

   Names are formatted as *Workflow template name : First target Name*.

5. Enter a description for the workflow.

6. Click **Assignments** if you want to assign or replace users or resource pools to the workflow.

   The **Assignments** area can vary in appearance according to what is required of the template.

   A table displays the task name, **Assignee**, and **Origin** columns. **Origin** specifies the source of the assignment (whether it came from an assignment list, project, dynamic participant, or resource pool). An asterisk is displayed next to any unstaffed profiles. Right-click and select **Remove** to delete any assignments.

   > Note:
   >
   > The **Origin** column only appears in Active Workspace 5.1 and Teamcenter 13.1.

   The panel expands to the right to display assignees and reviewers that you can assign to the task.

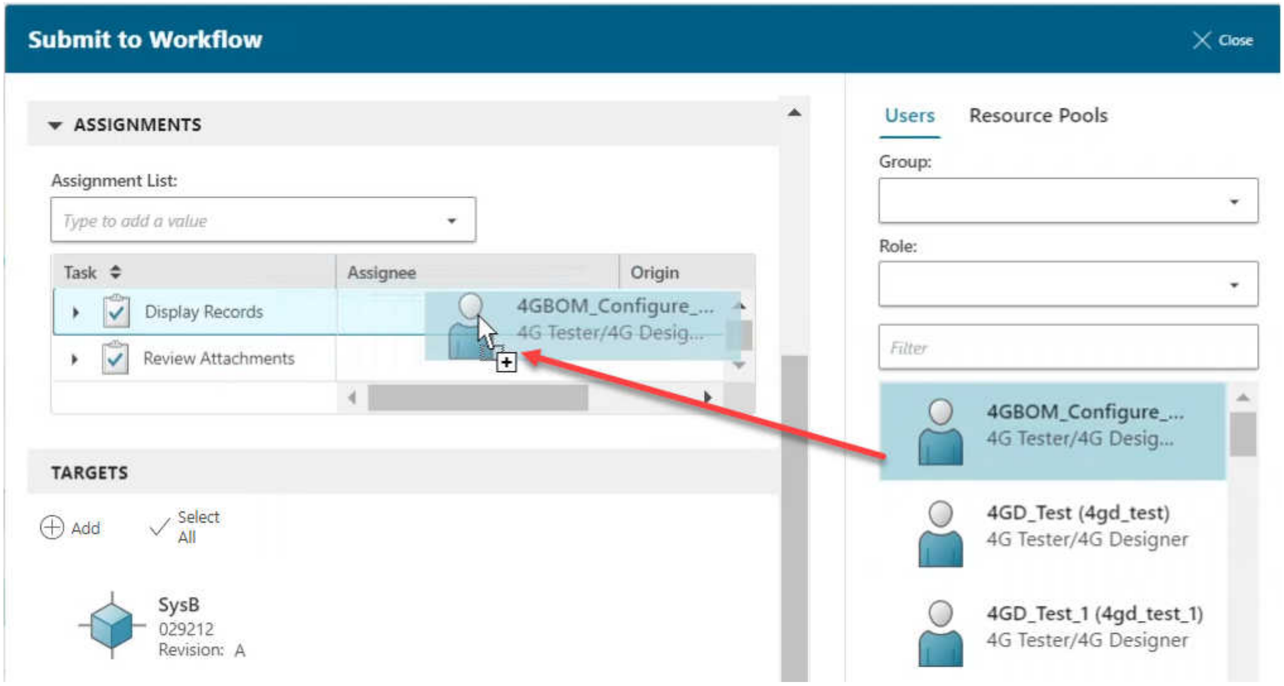
7. Select an **Assignment List**(s), if any exist for the template. The list is displayed only when lists are available to choose from.

   The assignments applied to the list(s) are displayed in the task table.

8. In the right-hand panel, you can specify a project to filter by (if the target object is assigned to a project of which you are a member). Specify users for the task by **Group** or **Role**, as necessary. Enter a name in the text box to filter.

   Click **Resource Pools** to filter for and add a predefined team.

9. Select a user or resource pool for the task and drag it to the **Assignee** column of the task table.

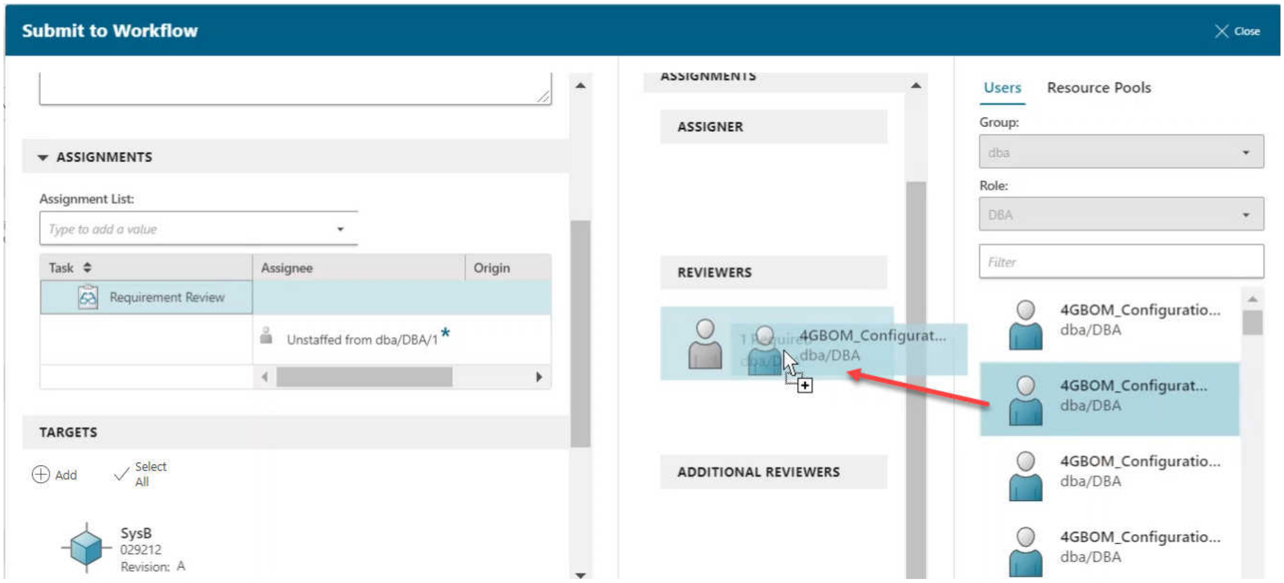


If you drag a user or a resource pool to a task in the table that contains a profile, this user or resource pool is added as an additional reviewer.

Click a specific task in the table to display the middle **Assignments** category area. Drag a user or resource pool to a specific role.

For the **Review** task, if a signoff profile is required, click the profile requirement icon so it is highlighted, then drag a user or resource pool *directly over* the icon. If the icon is *not* selected when you drag and drop, the user or resource group is added as an additional reviewer.

For example, in this workflow, one user from the **dba/DBA** group/role is required as a reviewer.



You can also select a user or resource pool, and then click **Assign** in the **Assignments** panel. Select a user or resource pool to display the **Remove** button to remove a user or resource pool from an assignment. Click **Modify** to save changes to the assignment list.

10. Click **Add** ⊕ to add target objects.

    The panel expands, and objects recently pasted to your clipboard are located under the **Palette** tab, as well as any favorites and your most recently-used items. Click the **Search** tab to filter for an object through a search. Once an object(s) is selected, click **Add** ⊕.

    The **All** and **Assigned** buttons will toggle and are enabled when targets are added to the workflow. The available templates will filter depending on your group, role, and content type.

    To remove a target object(s) from a workflow, select a target and click **Cut**. **Select All** ✓ highlights every object, while **Clear Selections** deselects the objects.

    > Note:
    >
    > You can start the workflow without adding any targets.

11. To add a reference, click **Add** ⊕. The panel expands, and references recently pasted to your clipboard are located under the **Palette** tab, as well as any favorites and your most recently-used items. Click the **Search** tab to filter for a reference through a search. Once a reference(s) is selected, click **Add** ⊕.

    To remove a reference(s) from a workflow, select a reference and click **Cut**. **Select All** ✓ highlights every reference object, while **Clear Selections** ✓ deselects the reference objects.

12. Click **Submit**.

Assign users to tasks

There are various ways to assign users to tasks, as described below. When you submit objects to a workflow, you can add users to tasks at the same time as well as once the workflow is in progress. Use the following methods to assign users to tasks.

Submit to Workflow

When you submit an object to a workflow (or subworkflow), you can assign or replace users for a task. See **Submit a target object to a workflow** for instructions. You can also start a workflow (or subworkflow) **without a target** and add or replace users.

Upcoming Tasks table

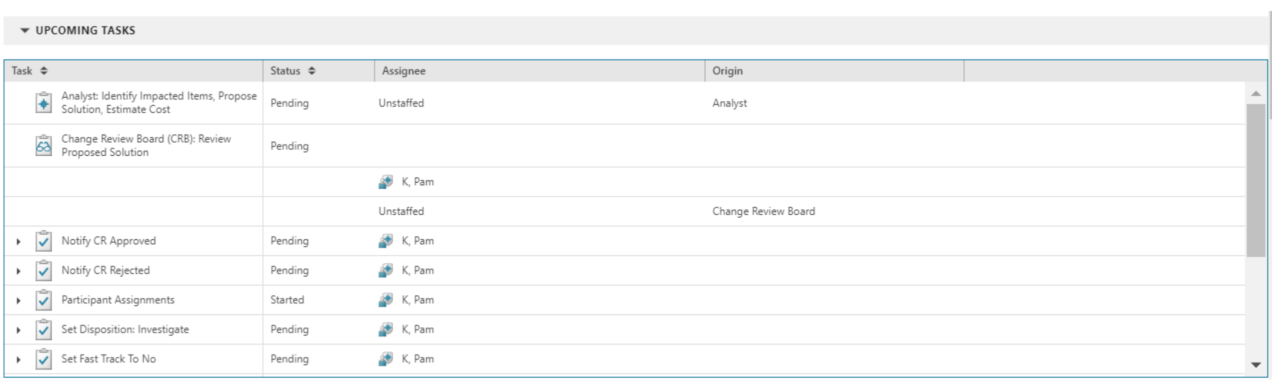
The **Upcoming Tasks** table shows all pending and unassigned tasks in the workflow or subworkflow, as well as the user assigned to the tasks. You can assign or replace task participants using this table.

Do the following:

1. Click the **Inbox** tile on the home page.

2. Click the **Workflow** tab.

3. Click **Upcoming Tasks**. The table is collapsed by default.



The table displays the task name, status, assignee, and the origin of the task assignment (such as a dynamic participant, project, assignment list, or resource pool).

4. Click **Edit**, **Start Edit**.

5. Only top-level tasks are displayed by default. Expand (▶) a parent task to view the child tasks.

   Click the task containing the assignment that you want to edit.

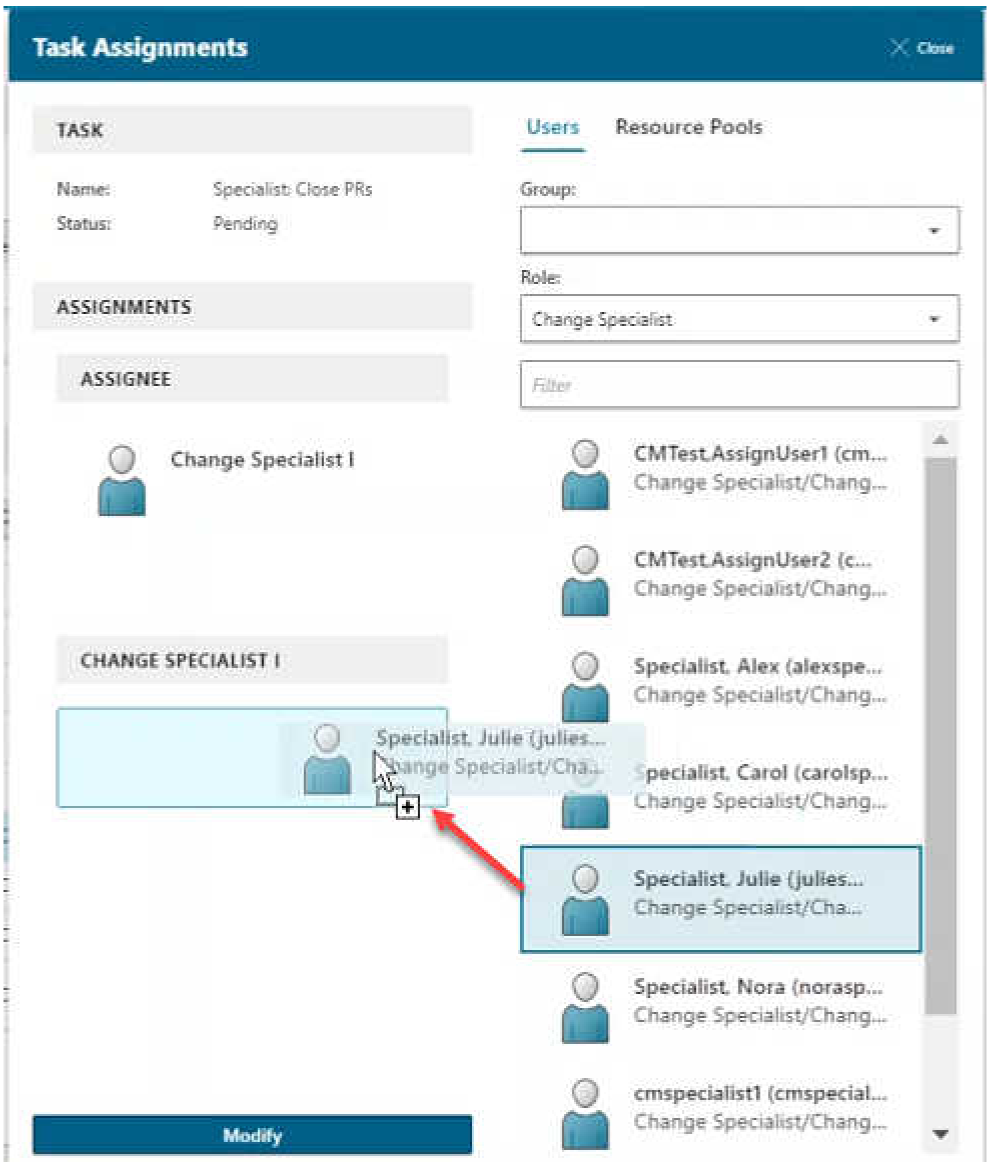
The **Task Assignments** dialog opens.

6. In the right-hand panel, you can specify a project to filter by (if the target object is assigned to a project of which you are a member). Specify users for the task by **Group** or **Role**, as necessary. Enter a name in the text box to filter.

   Click **Resource Pools** to filter for and add a predefined team.

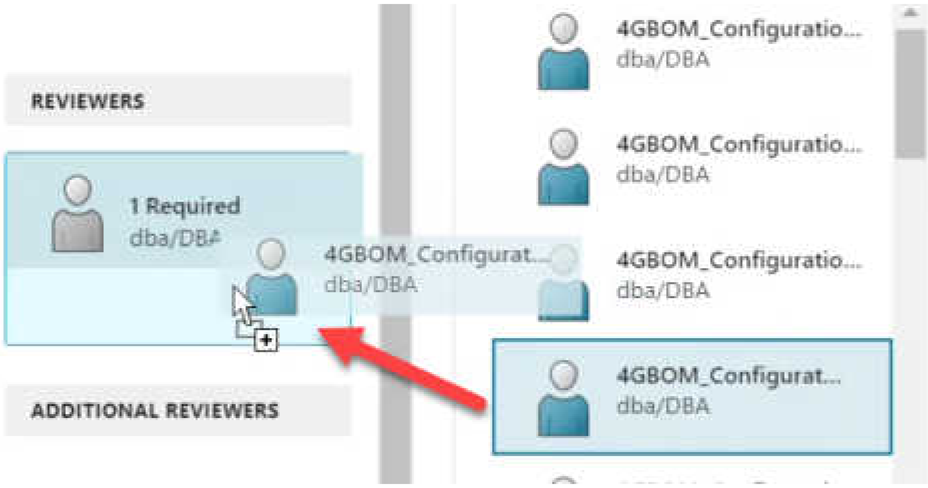
7. Select a user or resource pool for the task and drag it to the left, to the **Assignments** category.

   In this example, the user is that is being assigned to the **Change Specialist I** role is the task assignee.



For the **Review** task that contains a profile, click the profile name icon so it is highlighted, and then drag a user or resource pool directly over the profile name icon.

In this example, one user from the **dba/DBA** group is required as a reviewer.



You can also select a user or resource pool, and then click **Assign** in the **Assignments** panel. Click **Remove** to remove a user or resource pool from an assignment.

8. Click **Modify**.

9. Click **Edit** and **Save Edits**. Click **Cancel Edits** to discard any changes.

> Note:
>
> If a task is rejected or skipped, these tasks still appear in the **Upcoming Tasks** table.

Assignments tab

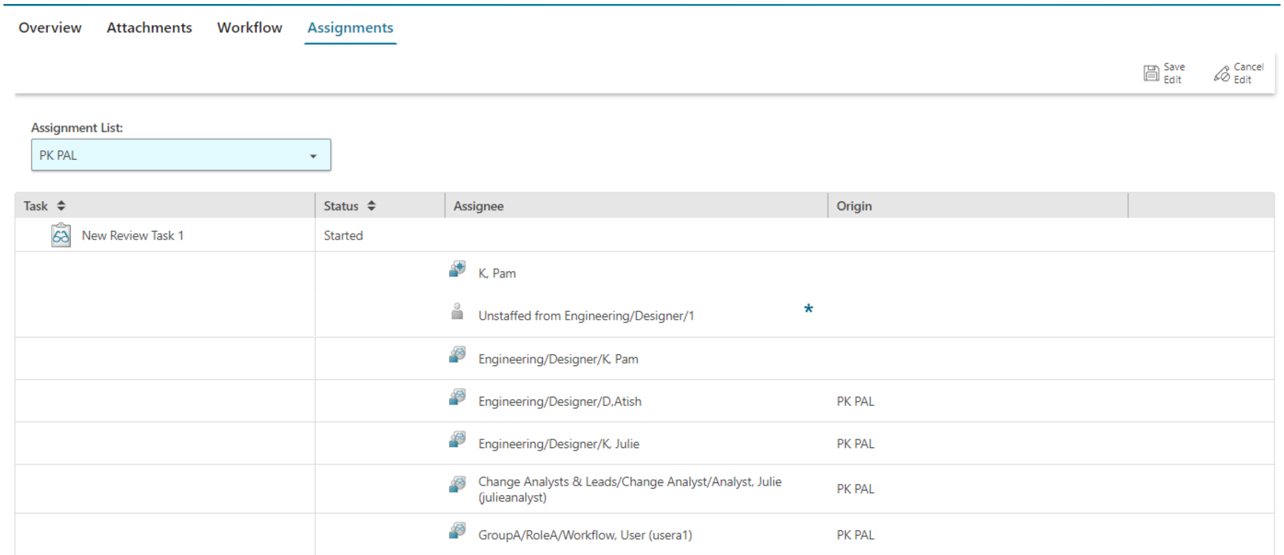
The **Assignments** tab shows all available tasks and the various assignments according to workflow process. You can assign or replace task participants using the task table.

1. Select a task from the **Inbox** and switch to the **Assignments** tab to view all tasks in the workflow.

2. Click **Start edit** . This enables the assignment list table and lets you edit the assignments.

3. If an assignment list is available for the template, select one from the **Assignment List** list.

   The assignments applied to the list are displayed in the task table.



The table displays the task name, status, assignee, and the origin of the task assignment (such as a dynamic participant, project, assignment list, or resource pool).

4. Click the task containing the assignment that you want to edit.

   Only top-level tasks are displayed by default. Expand (▶) a parent task to view the child tasks.

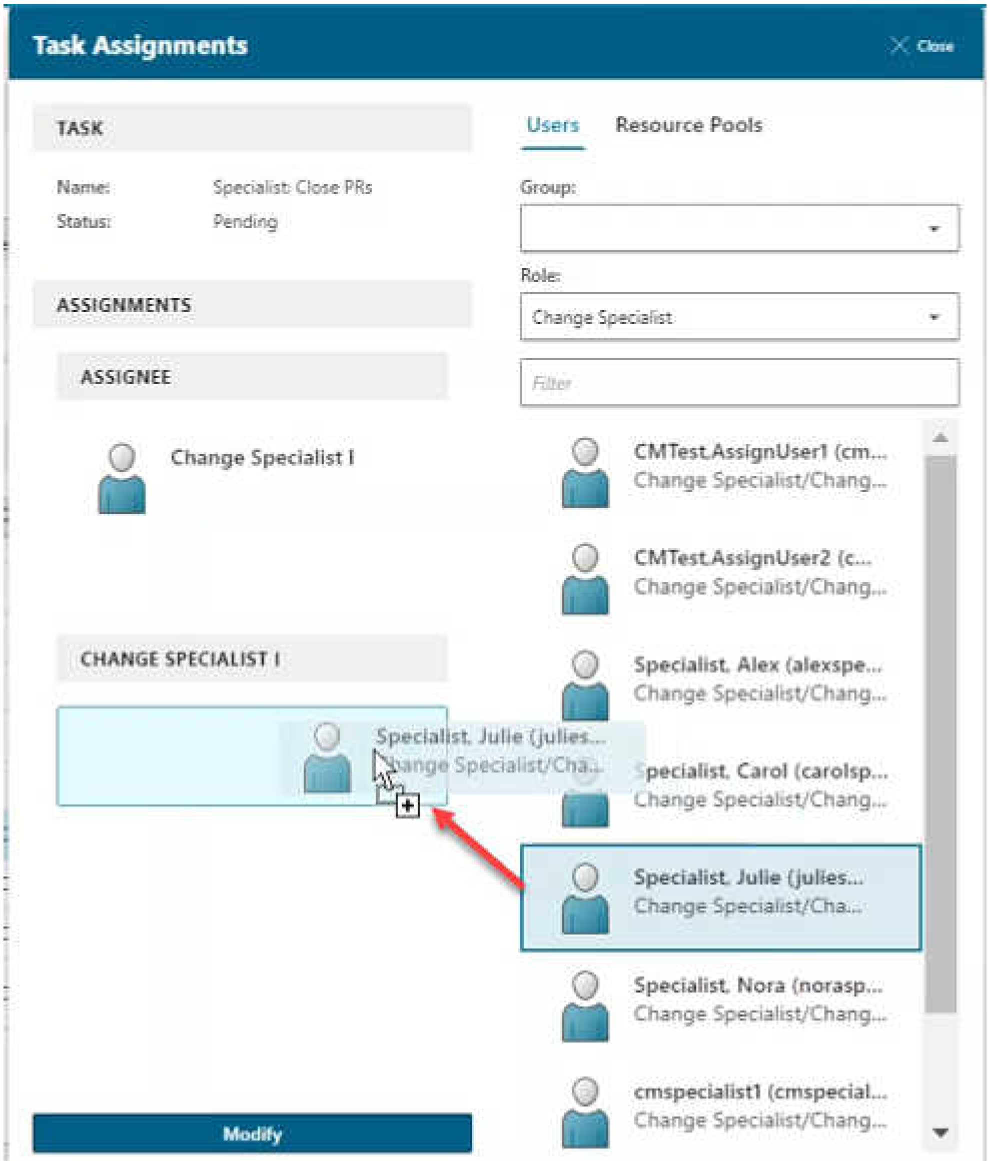
   The **Task Assignments** dialog opens, and the task information is displayed along with the assignee and reviewer information.

5. In the right-hand panel, specify users for the task by **Group** or **Role**, as necessary. Enter a name in the text box to filter.

   Click **Resource Pools** to filter for and add a predefined team.

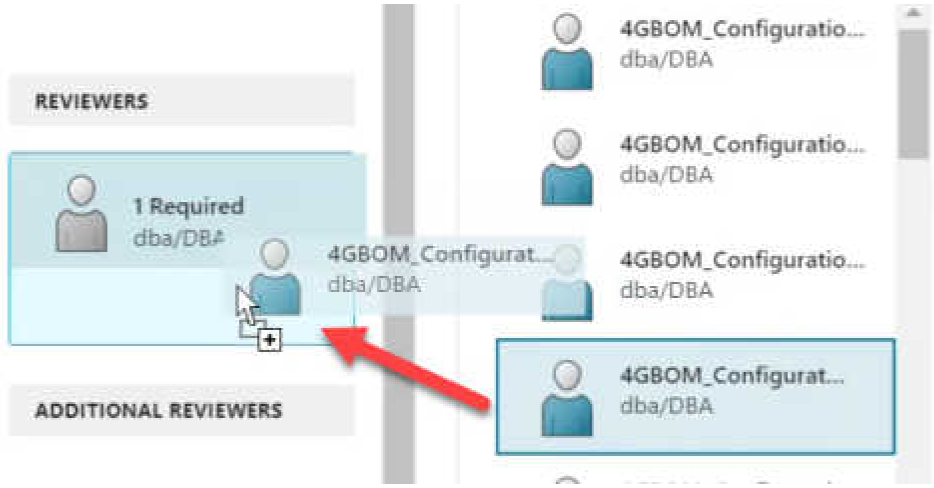
6. Select a user or resource pool for the task and drag it to the left, to the **Assignments** category.

   In this example, the user is being assigned to the **Change Specialist I** role.



For the Review task that contains a profile, click the profile name icon so it is highlighted, then drag a user or resource pool directly over the profile name icon.

In this example, one user from the **dba/DBA** group is required as a reviewer.



You can also select a user or resource pool, and then click **Assign** in the **Assignments** panel. Click **Remove** to remove a user or resource pool from an assignment.

7. Click **Modify**.

   The task table reflects the assignment changes.

Select a signoff team

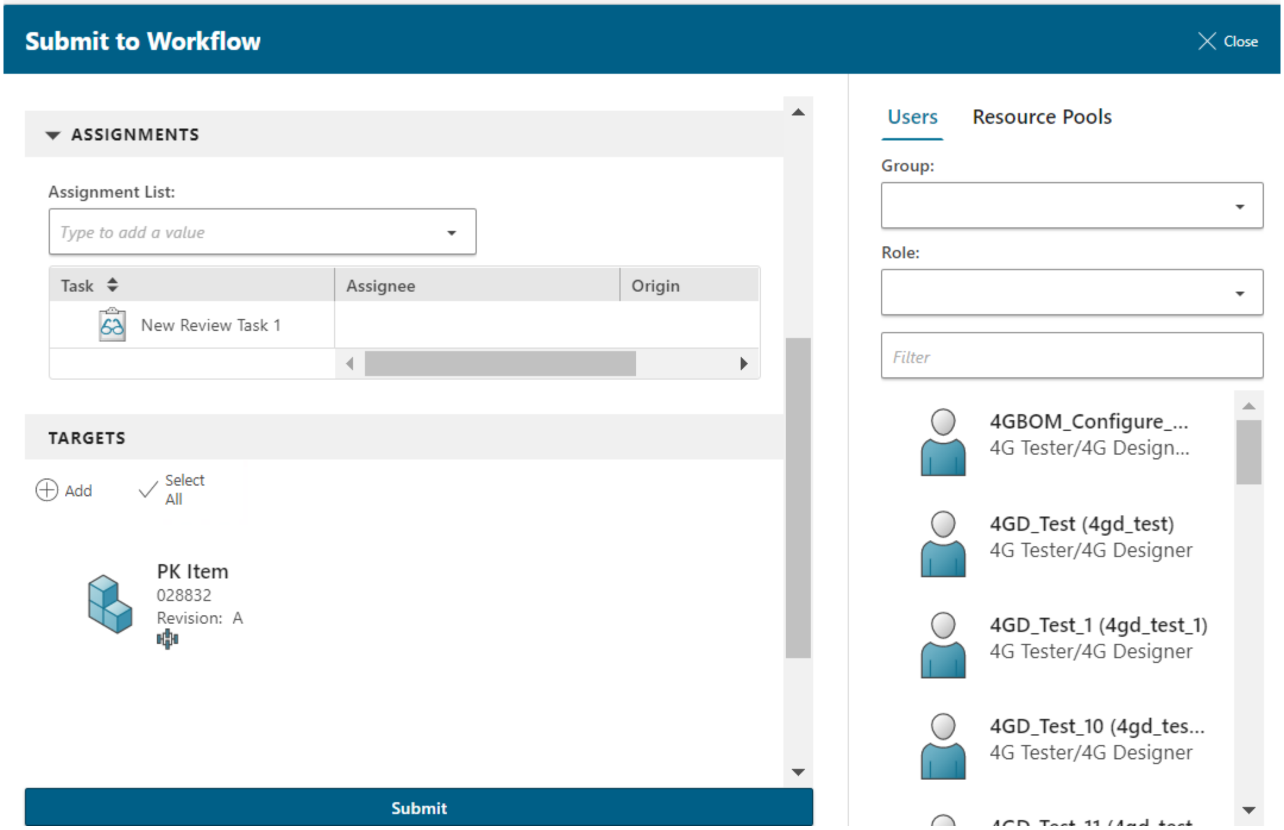
A signoff team consists of members or groups responsible for reviewing and signing off on target objects.

To perform a **select-signoff-team** task (which is a subtask included in the Review and Acknowledge task), the responsible party selects users to be members of the signoff team when submitting an object to workflow. Once submitted, you can select members in the select-signoff-team task via **My Tasks**. You can choose individual users, a group, or resource pool and specify quorum requirements.

Each member of the signoff team is responsible for reviewing and signing off on the attached target objects. They do this using the **perform-signoffs** task, which is sent to their worklist as soon as the signoff team is completed.

Add signoff team members when submitting to a workflow

1. On the **Submit to Workflow** panel, click **Assignments**.



A table of tasks displays the task name, **Assignee**, and **Origin** columns. **Origin** specifies the source of the assignment (whether it came from an assignment list, project, dynamic participant, or resource pool). An asterisk is displayed next to any unstaffed profiles. Right-click and select **Remove** to delete any assignments.

The **Origin** column only displays in Active Workspace 5.1/Teamcenter 13.1.

The panel expands to the right to display assignees and reviewers that you can assign to the task.

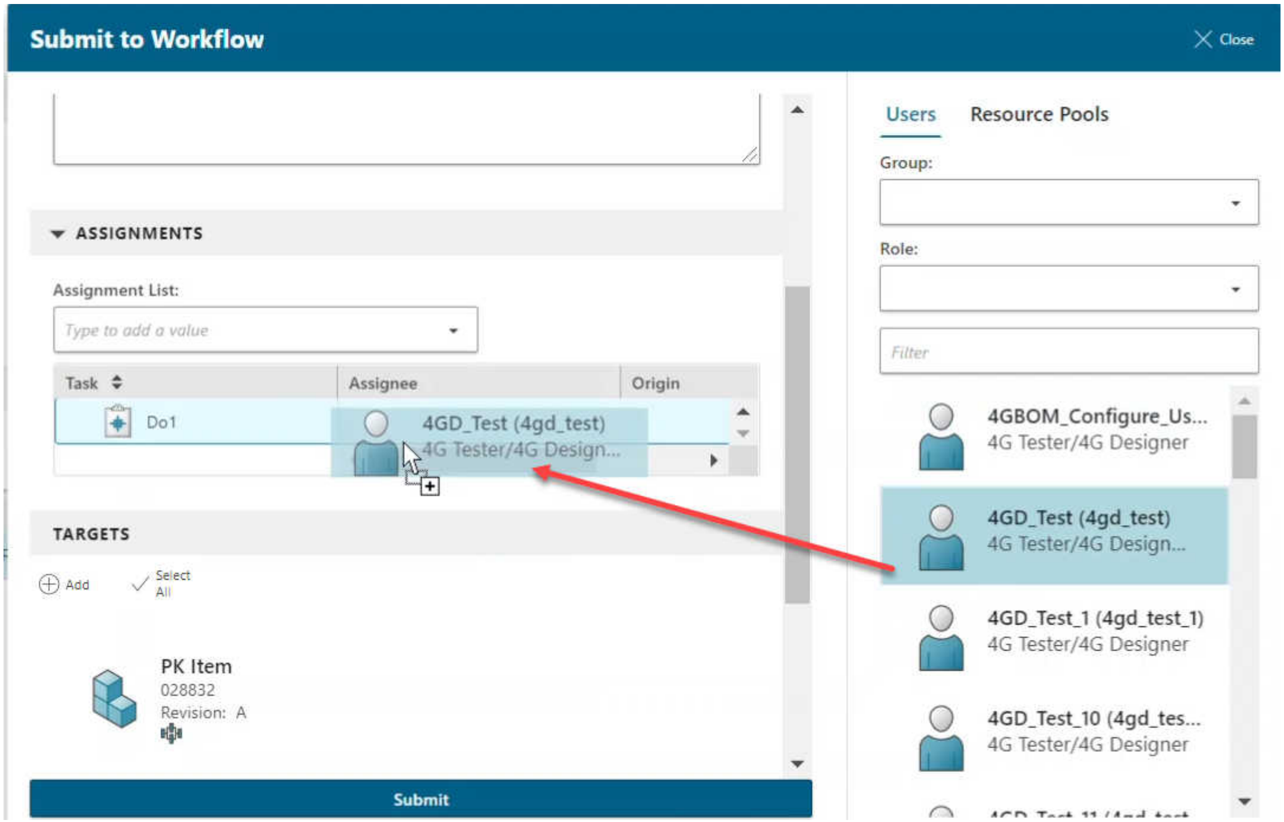
2. Select an **Assignment List(s)**, if any exist for the template. This list is only displayed when assignment lists are available to choose from.

   The assignments applied to the list are displayed in the task table.

3. In the right-hand panel, you can specify a project to filter by (if the target object is assigned to a project of which you are a member). Specify users for the task by **Group** or **Role**, as necessary. Enter a name in the text box to filter.

   Click **Resource Pools** to filter for and add a predefined team.

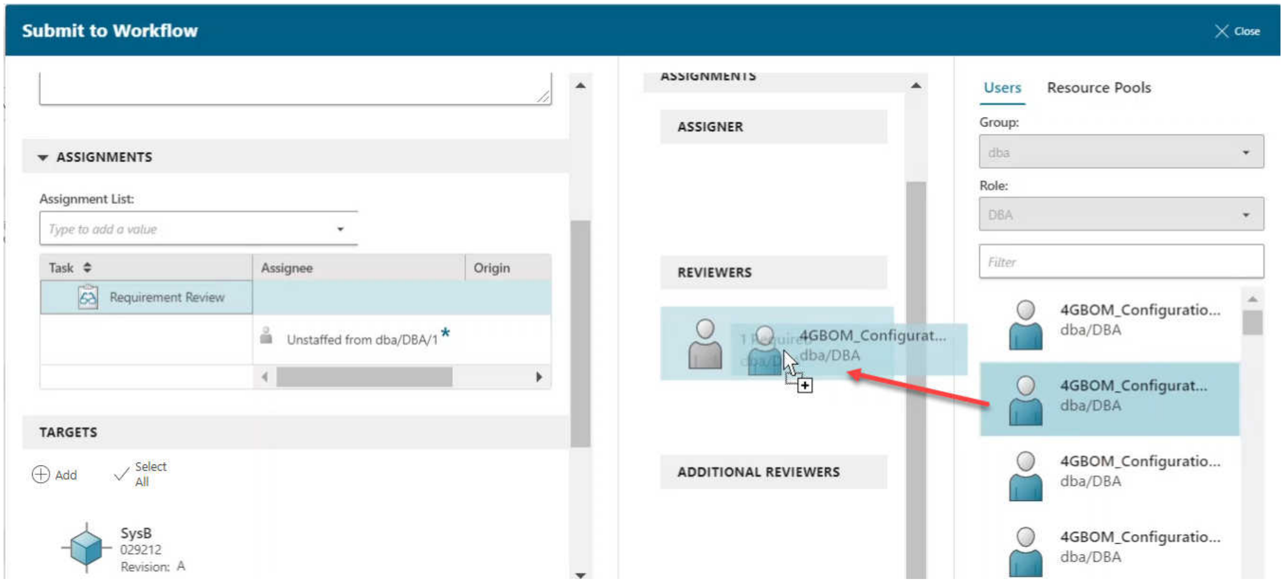
4. Select a user or resource pool for the task and drag it to the **Assignee** column of the task table.



5. Click a specific task in the table to display the middle **Assignments** category area. Drag a user or resource pool to a specific role.

   For the **Review** task, if a profile is required (such as in a signoff profile), click the profile requirement icon so it is highlighted, then drag a user or resource pool directly over the icon. If the icon is not selected when you drag and drop, any user or resource group is added as an additional reviewer.

   For example, in this workflow, one user from the **dba/DBA** group/role is required as a reviewer.



You can also select a user or resource pool, then click **Assign** in the **Assignments** panel. Select a user or resource pool, and then right-click and select **Remove** to remove a user or resource pool from an assignment.

6. Click **Modify** to create the reviewer's list.

Add signoff team members in My Tasks

1. On the homepage, click the **Inbox** tile or the **Inbox** icon on the global navigation.

2. Click **My Tasks**, if not already displayed.

3. Select a **Select Signoff Team** task.
   The work area displays the properties of the task and any attached objects.

4. You can add or remove members of the signoff team by clicking **Add** or **Remove** in the **Overview** tab.

5. Type a name or title to filter the list of **Users** or **Resource Pools**. To add multiple users and resource pools, continue to filter and select reviewers.

> Note:
>
> In Active Workspace, you must specify a user to assign to the signoff team for the **Complete** button to appear. In the rich client, assigning a user is optional or required depending on the workflow template.

6. Click **Add** to create the reviewer's list.

Tip:

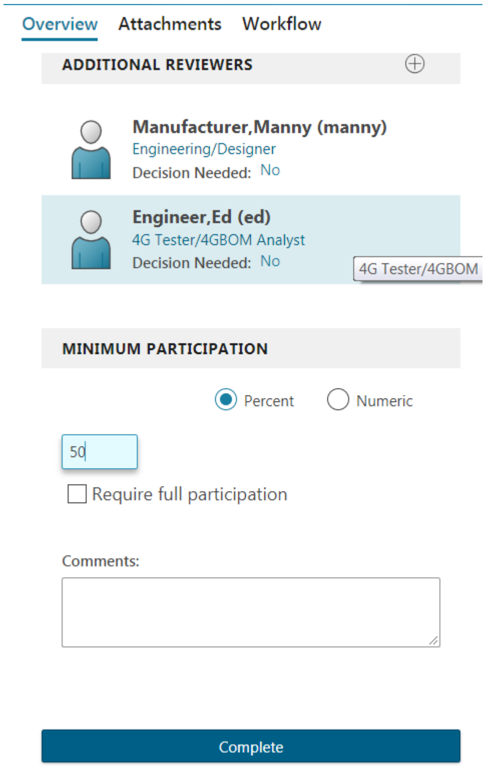
Use the **Workflow** tab to see the task in the context of the workflow and get more information about preceding tasks, such as what decisions were made, or information about an upcoming task.

You can also use the **Assignments** tab to add or remove members of the signoff team. See Assign users to tasks.

You can select a future **Select Signoff Team** task and make the assignments using the Workflow tab's **Upcoming Tasks** table. See Assign users to tasks.

7. Specify whether the user is required or optional by clicking **Yes** next to **Required** below the user's name and role. The default setting is **No**.

8. (Optional) Specify the completion criteria by entering the **Minimum Participation** information.



- **Percent/Numeric**
  You can designate the number or percentage of reviewers required for the quorum, between 1 and the total number of users required for the selected signoff.

Note:

If the **WRKFLW_allow_quorum_override** preference is set to **False** in Workflow Designer, the **Percent/Numeric** option is disabled. The default is **True**.

- **Require full participation**
  Select this option if you want all users to review and comment before the workflow process progresses.

  > Note:
  >
  > If the **WRKFLW_allow_wait_for_undecided_override** preference is set to **False** in Workflow Designer, the **Require full participation** option is disabled. The default is **True**.

> Example:
>
> You can use required signoffs with quorums to prevent the task from completing until all required reviewers provide a signoff decision.
>
> For example:
>
> - When a task has five reviewers, but none are required, and quorum is set to **2**; the task proceeds when two reviewers provide their decisions.
> - If, however, one of the five reviewers is marked as required; the task does not proceed until the required reviewer provides a decision, even if the quorum is met.

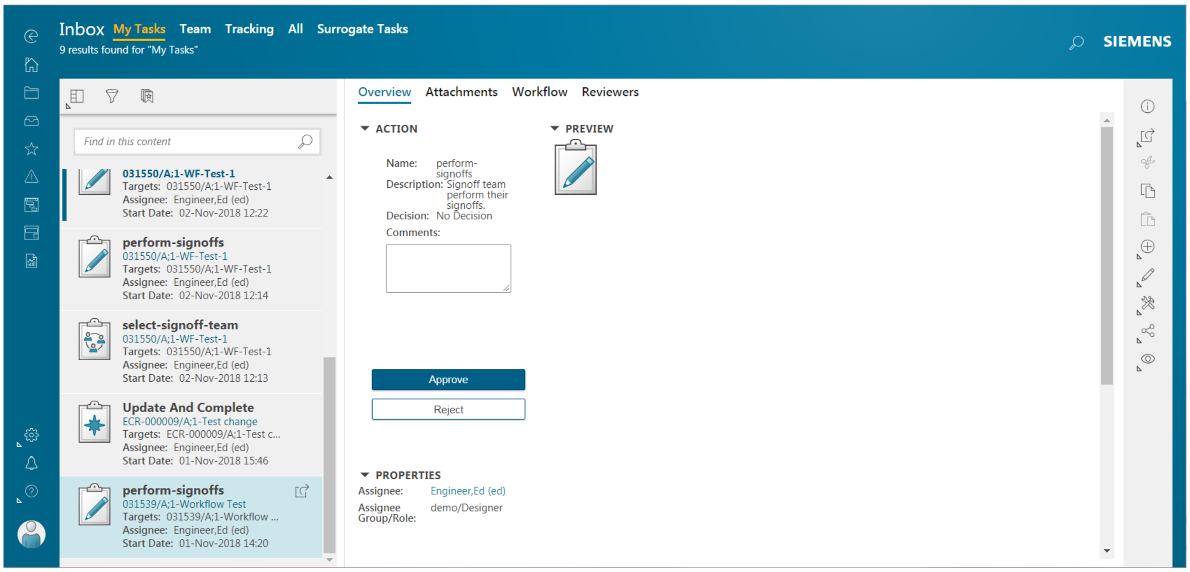
9. Click **Complete**.

3. Working with tasks

Edit tasks within the inbox

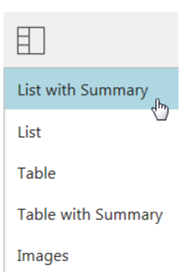
Inbox

You can access your **Inbox** from the homepage or by clicking **Inbox** from the global navigation.



The **Inbox** view shown above is **List with Summary** and a **perform-signoffs** task is selected.

The **Inbox** view options include:



> Note:
>
> The **WRKFLW_preselect_first_task** preference defaults to **false** and automatically opens the first task in your Inbox list. Set this preference to **false** to keep the first task from being preselected.

Inbox header tabs	**My Tasks**	Displays all tasks assigned to you.
	Team	Displays all tasks assigned to the resource pools you belong to.
	Tracking	Displays tasks with which you are associated, such as tasks that you have signed off but are waiting for others to sign off so that it can be marked as complete.
	All	Displays all tasks assigned to both you and any resource pools you belong to.
	Surrogate Tasks	Displays tasks assigned to users that have assigned you as their surrogate.
	Remote Inboxes	Displays any remote sites that the user is connected to.

My Tasks list

My Tasks displays objects assigned to the user that you can filter and search.

Work area

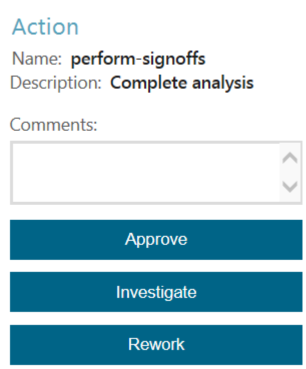
The work area displays details, actions, and targets about the selected task. The details displayed depend on the type of task selected.

If you do not select a task, a graph of the results is displayed.

The **Work Area** tabs are dependent on the contents of the task but may contain **Overview**, **Attachments**, **Workflow**, **Reviewers**, and **Assignments**.

Embedded actions

Embedded actions are displayed in the work area in the **List with Summary** or **Table with Summary** view.



All other views automatically display the **Complete Task** panel.

Preview

A preview is displayed, depending on the object.

Note:

- If a workflow task **Complete** action fails due to a workflow handler error, the task remains in the user's inbox and the user can complete the task after resolving the handler issue. The only exception occurs when a **Validate** task **Complete** action fails due to a workflow handler failure, and a path is configured for the error.

- If a **Route** task is in the inbox because it is at the **select-signoff-team** stage, the selection options are available in the embedded actions.

  When interacting with route task's **select-signoff-team** stage, do not perform the subtask's **select-signoff-team** tasks individually. If you expand a Route task to assign a reviewer without assigning anyone to the **Notify** or **Acknowledge** tasks, all tasks remain in the yellow stage (started). Note that this is designed behavior.

- If a **Route** task is in the inbox due to handler failure on a **Complete** action, only the **Complete** action is available.

How are tasks assigned?

Tasks are assigned automatically when a workflow is initiated. For example, you are assigned the task to define who should sign off on a document or validate a change. In addition, you may receive tasks from other users as shown in the table. Your inbox provides you with access to all your different types of tasks, as well as tasks that you are tracking.

Tasks	Meaning
Reassigned to you	Another user can **reassign a task to you**. The task appears in your list of tasks and is no longer in the original owner's inbox. You can also reassign tasks if you have the correct permissions.
Assigned to a team to which you are a member	You or anyone on your team can **claim and perform tasks that are assigned to a team** to which you are a member (also referred to as *resource pool*). All users belonging to the team see the tasks in the **Team** tab of the inbox.
Made a surrogate of another user's tasks	You or others can be **made a surrogate of another user** and be authorized to perform workflow tasks on their behalf. As a surrogate, you can claim responsibility (*stand-in*) for the tasks **provided that your group and role profile match those required for the task**. All surrogates see the original owner's tasks in the **Surrogate Tasks** tab of their inbox. The original owner can also see the tasks in their inbox.
Forwarded for a specified period of time	You are **forwarded the tasks** belonging to a user during a set period, such as when the user is out of office. The tasks appear in your inbox and are no longer in the inbox of the original owner.

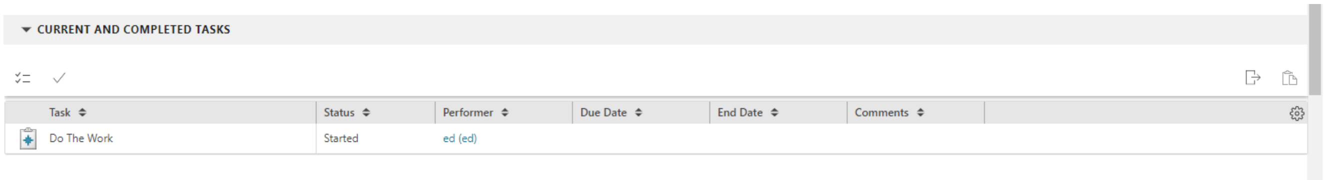
View workflow tasks

To view the tasks in a workflow, use the **Workflow** tab. It displays required tasks, such as approvals, signoffs, form tasks for item revisions, and changes submitted to a workflow. The signoff information also displays completed tasks and approvals.

The **Workflow** tab contains the following sections.

Current and completed tasks

This section displays both current and completed tasks, with the current, most recently opened task displayed first.



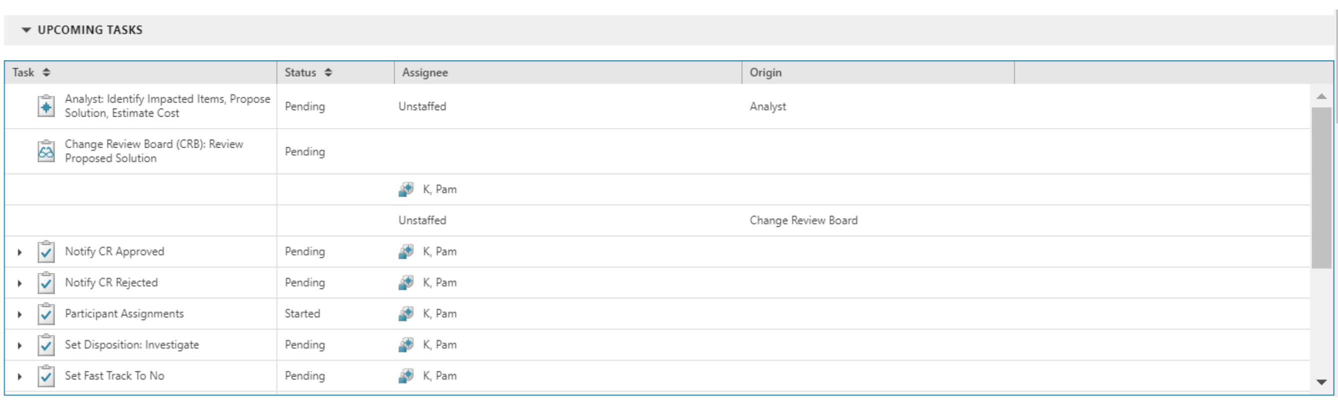
You can edit the **Due Date** and **Comments** fields in the task table by clicking **Edit** > **Start Edit** on the primary toolbar.

Click **Edit**, again, to save or cancel your changes.

Upcoming tasks

You can view upcoming tasks and assignments for a more holistic understanding of a workflow status using the **Upcoming Tasks** table. This table shows all pending and unassigned tasks in the workflow as well as the user assigned to the tasks.

The information most relevant in the task is displayed in the table. For example, for a single user task, the **Assignee** column displays specific information. The **Origin** column specifies the source of the assignment (whether it came from an assignment list, a project, a dynamic participant, or resource pool).

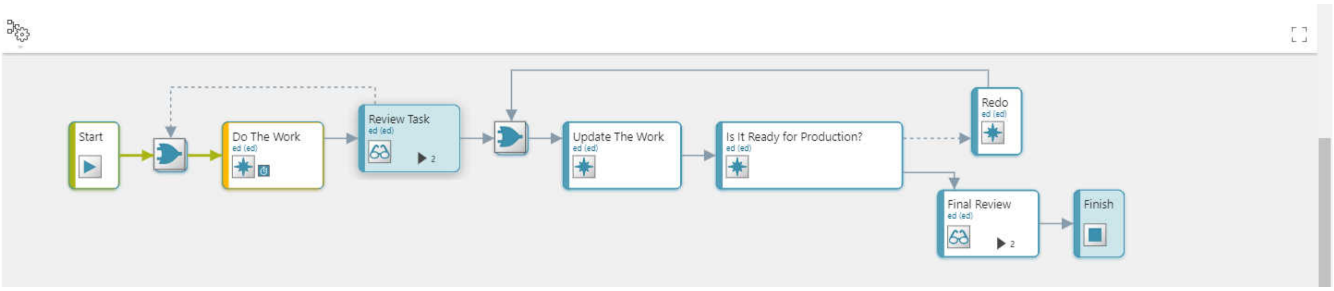


You can edit the task assignments from the **Upcoming Tasks** table. See Assign users to tasks.

> Note:
>
> If a task is rejected or skipped, these tasks still appear in the **Upcoming Tasks** table.

Graphical view

The graphical view displays the entire task workflow. The colored tiles display the task type, due dates, and the assigned users.



> Tip:
>
> You can double-click the background to zoom out and display the entire workflow.

The task is currently active and not yet complete. This also turns red when the task is overdue.

The task is processing in the background.

This shows only when a task is designated to be run in background (asynchronous workflow is configured).

The task is complete.

The task failed.

- The task **Overview** tab and signoff tables show information about failed tasks. You can also hover over the icon to view the error information.

- If the task has been removed from your inbox due to an error, you can search for the workflow target and select it to view the workflow information.

You can change the workflow layout in the graphical view. Click **Apply Layout** to select a layout option.

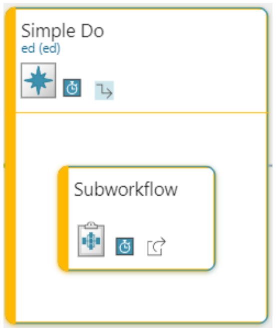
The default auto-layout options display the task node locations as determined by the Active Workspace automatic positioning. This includes:

- **Top-to-Bottom**
- **Right-to-Left**
- **Left-to-Right**

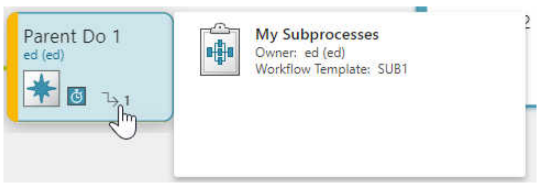
Fixed layout displays the task (and subtask) node size and the location as they were last saved in the rich client or in Active Workspace. This also lets you view legacy template layouts as they were originally designed in the rich client.

If a workflow contains a subworkflow (also known as a subprocess), click **Show Children** ↳ to switch between showing and hiding the subworkflows. The number of subworkflows is displayed next to the icon when hidden.

A subworkflow in the auto layout is as follows:

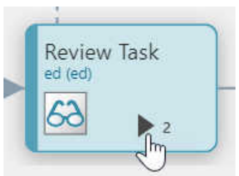


A subworkflow in the fixed layout is as follows:

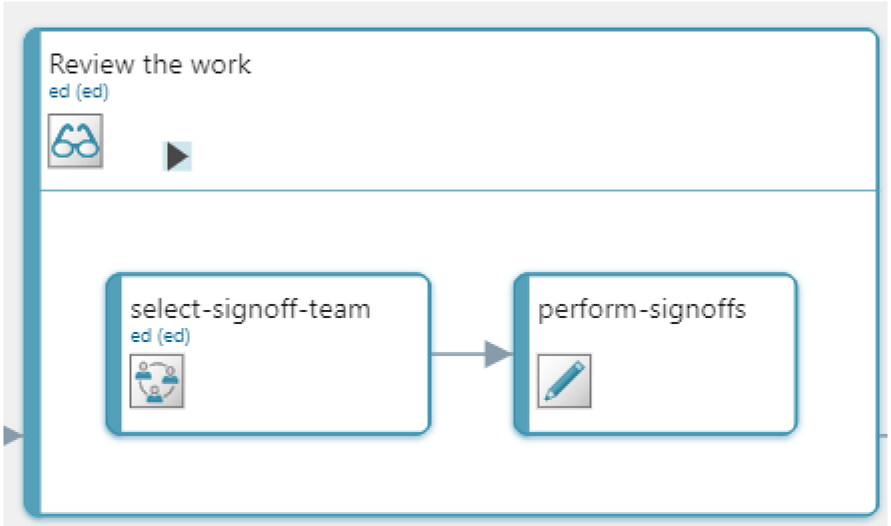


When you select a task assigned to you, the initial workflow view focuses on the previous, current, and next tasks. Tasks with multiple action items, such as selecting a signoff team and performing signoffs, are minimized and indicated by an arrow.

To view any subtasks, click **Show Children** ▶ to switch between showing and hiding the subtasks. The number of subtasks is displayed next to the icon when hidden.



The subtasks expanded in the auto layout appear as follows:



In fixed layout, a subtask opens in its own window with breadcrumbs indicating the path back to the parent task.

Assign Users Do ReviewProfile Acknowledge > Review the work >

Non-interactive tasks do not require user interaction and are shown as an icon. Examples of non-interactive tasks are **Start** and **Finish**.

You can do any of the following:

- **Reassign the task to another user**
- **Promote the task** (if you have the required privileges)

> Note:
>
> All interactive tasks can be promoted, but only if your administrator has configured the action.

- **Suspend a task** (if you have the required privileges)
- **Abort a task** (if you have the required privileges)

Sign off on a task

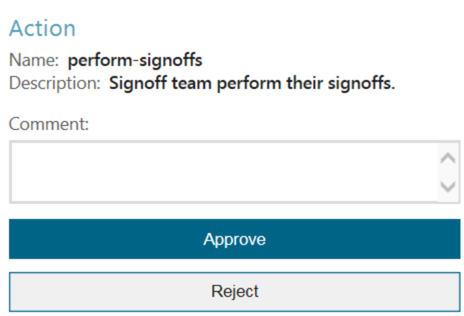
> Note:
>
> You must manually change to a group or role that was specified in the SIGNOFF_required_group_and_role preference to complete a task.

The **My Tasks** tab of your **Inbox** lists your assigned signoff tasks. You can approve, reject, acknowledge, not acknowledge, or comment depending on the type of task. For example, you can select to approve or reject a review task.

> Note:
>
> You can add comments without signing off on the task. For example, you add notes or details about the review.

1. Click the **Inbox** tile on the home page.

2. Select the **Perform Signoffs** task that you want to perform.

   > Tip:
   >
   > - The work area displays the properties of the task, including a brief description, owner, and due date. It also displays a list of attached objects.
   >
   >   The **Overview** tab displays the **Action** panel with embedded actions.
   >
   >   
   >
   >
   > - You can see the task in the context of the current task in the Workflow Viewer. Select the **Workflow** tab to get more information on preceding tasks, such as what decisions were made on a **Perform Signoff** task, or on an upcoming task. You can also select a future **Select Signoff Team** task and make the assignments.
   >
   > - Attach items to the task.

3. Click the embedded task action in the **Overview** tab.

Alternatively, in the **Workflow** tab, select a task and click **Manage** > **Complete Task** on the primary toolbar.

4. Enter text in the **Comment** box and then select a decision. The following are example decisions for a review task:

   - **Approve**
     Sign off the task with your approval.

   - **Reject**
     Sign off the task without your approval. Your decision does not count toward the quorum approval count required to complete the task. If the quorum requires all signoffs for approval, your rejection stops the workflow process (if the template is configured as such).

   Note:

   - **Approve**, **Reject**, **Acknowledged**, and **Not Acknowledged** are the default decision selections for review and acknowledge tasks. Your administrator can change these selections to best fit your workflow process. See *Add a list of values to Review and Acknowledge tasks* in the Workflow Designer Guide.

   - Depending on how the workflow is configured, you may be required to re-enter your password before approving or rejecting the task.

Perform a Do task

A task, often called a **Do** task, provides instructions for you to follow.

There are multiple ways to complete a Do task.

From the Inbox

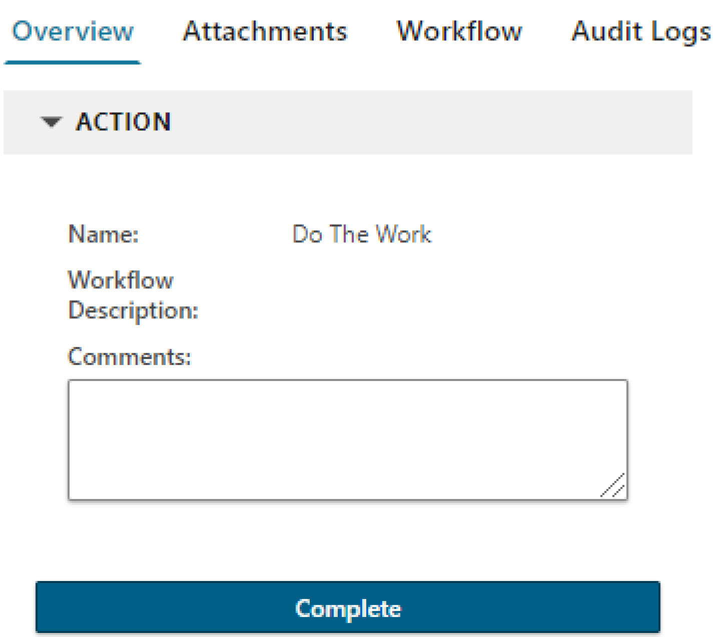
1. Click the **Inbox** tile on the home page.

2. Click on the **Do Task** you want to complete.

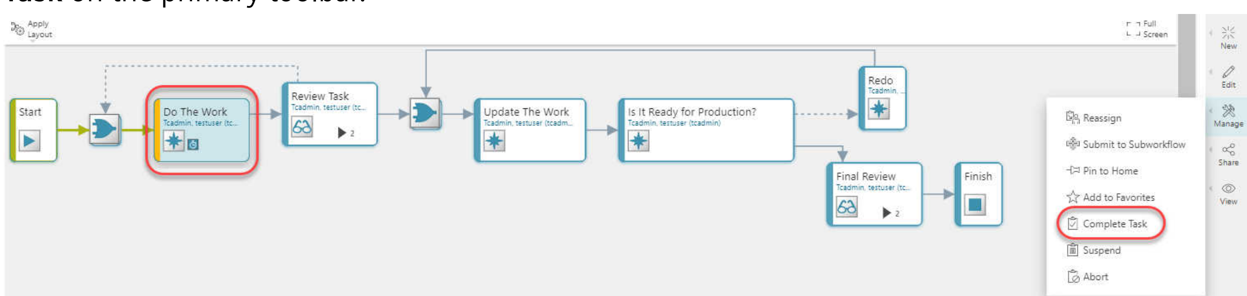
   The work area displays the properties of the task, including a brief description and a list of attached objects.

   You can perform a task in the following locations:

   - In the **Overview** tab, click the embedded task action in the **Actions** section. Review any task instructions and process description. If necessary, type additional information into the **Comments** box, then click **Complete**.



- In the **Workflow** tab, select the task in the graphical area, and then click **Manage** > **Complete Task** on the primary toolbar.



Review any task instructions and process description. If necessary, type additional information into the **Comments** box, then click **Complete Task**.

3. Tasks that are designated as **Required Task Confirmation** display a message requiring the user to confirm a task is completed. Depending on the task type, the confirmation message varies. Message examples include **Approve**, **Reject**, or **Completed**.

   Once you confirm completion or rejection of the task, the **Confirmation** window closes and the task is marked as completed. If you select **Cancel**, the **Confirmation** window closes, but the task is not marked as completed and the **Complete Task** panel remains open.

Note the following:

- Comments in a **Perform Task** panel are not retained until a task decision action, such as **Complete**, **Rejected**, or **Approved**, is chosen. To add or modify the **Comments** without performing a task action, you can use the **Information** ⓘ panel **Start Edit** button, or you can edit the comments using use **Start Edit** on the primary toolbar.

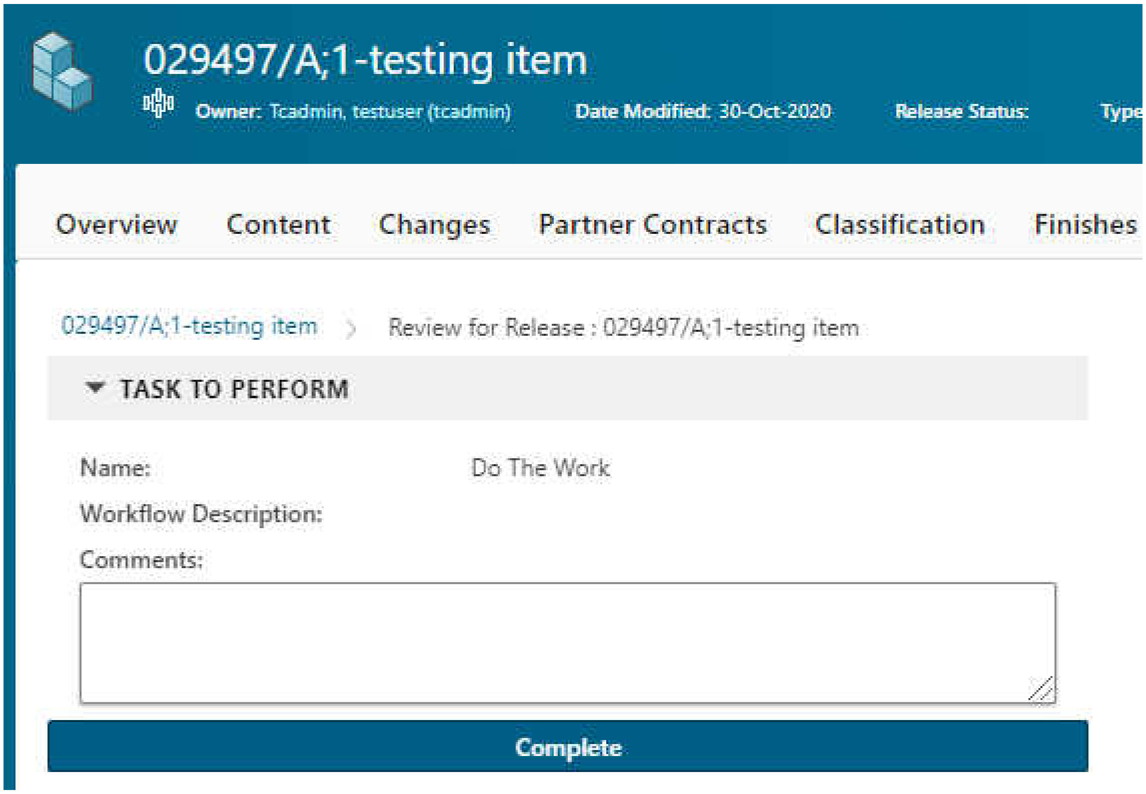
- Use the **Attachments** tab to display the objects, references, and forms attached to the task. You can attach items to the task if necessary.

From the target object

1. Locate and open the target that is a part of the workflow that contains the Do task (such as in **Folders**, **Changes**, or through a search).

2. You can perform a task in the following locations:

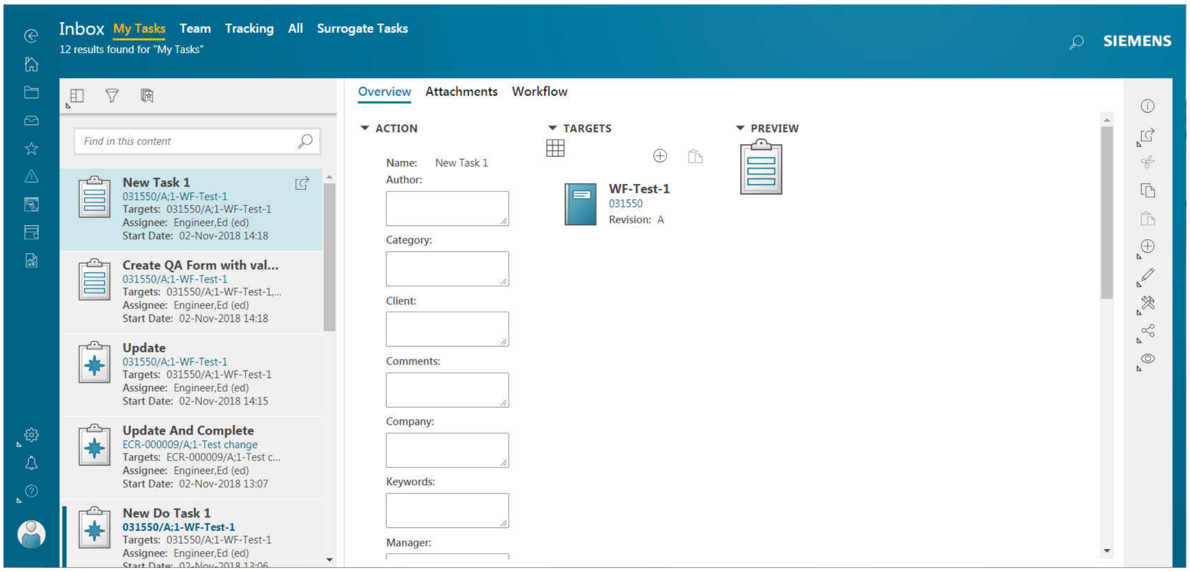
   - Click the **Workflow** tab, then click **Complete** in the **Tasks to Perform** section.



   - In the **Overview** tab, click **Manage** > **Complete Task** on the primary toolbar.
     For change objects, you can also click **Complete** in the **Overview** tab's **Task to Perform** section.

Perform a Form task

A **Form** task requires completion of various form fields. When you open the task, the form appears under **Actions**. Once the fields are filled in, select **Complete** to perform the task.



Tip:

If configured by your administrator, you can also perform a **Form** task when selecting the attached object from the search results or any other location where it appears.

There are multiple ways to complete a Form task.

From the Inbox

1. Click the **Inbox** tile on the home page.

2. Click the **Form** task you want to perform.

   The work area displays the task details, such as the task name, assignee, start date, and due date.

   Tip:

   - Before performing the task, you can view and edit the form field in the **Overview** tab. When you perform the task, the fields are populated with the information you entered when editing the form.

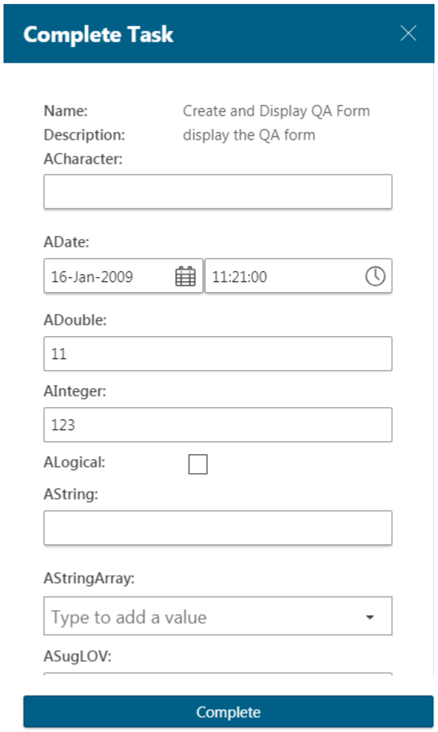
   - Use the **Workflow** tab to view the task in the context of the workflow and display any signoff information. The Workflow tab displays information on completed, current, and upcoming tasks.

   - Use the **Attachments** tab to display the objects, references, and forms attached to the task.

3. You can do either one of the following:

- In the **Overview** tab, click **Complete** in the **Action** section.

- In the **Workflow** tab, select the task in the graphical area, and then click **Manage** > **Complete Task** on the primary toolbar. Enter the requested information into the form fields, then click **Complete** (you must fill all required fields to complete the task).



> Note:
>
> Comments in a **Complete Task** panel are not retained until a task decision action, such as **Complete**, **Rejected**, or **Approved**, is chosen. To add or modify the **Comments** without performing a task action, you can use the **Information** panel **Start Edit** button, or you can edit the comments using use **Start Edit** on the task **Overview** tab.

From the target object

1. Locate and open the target that is a part of the workflow that contains the Form task (such as in **Folders**, **Changes**, or through a search).

2. Click the **Workflow** tab, then click **Complete** in the **Tasks to Perform** section.

   Alternatively, in the **Overview** tab, click **Manage** > **Complete Task** on the primary toolbar.

   For change objects, you can also click **Complete** in the **Overview** tab's **Task to Perform** section.

Set the task priority

Task priority helps you manage, sort, and filter your tasks. For example, you can enter a priority impact level, such as low, medium, or high, and then filter on that value.

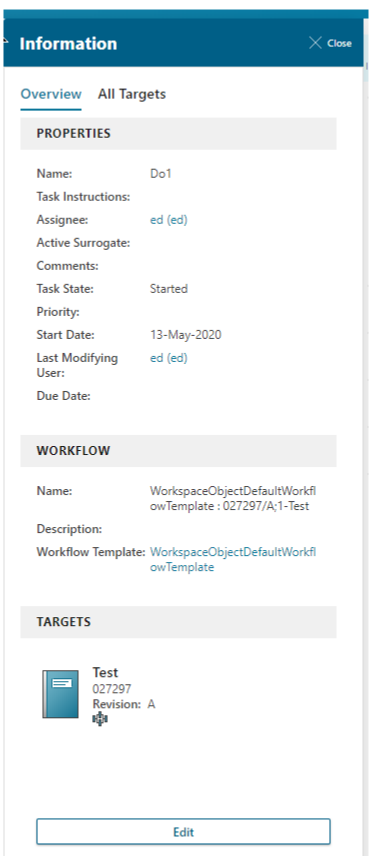
1. Click the **Inbox** tile on the home page.

2. Click the **My Tasks** tab, if not already displayed.

3. Click a task whose priority you want to set.

4. Click **Overview**.

5. To view or edit the priority, click ⓘ to open the **Information** panel and click **Edit**.



6. Set the priority to a value, such as a date, impact level, or numeric value.

7. Click **Save** to save the priority.

   To cancel your edits without saving, close the **Information** panel. A message appears asking if you would like to save or discard any unsaved edits.

Reassign a task to another user

If you are the responsible party, or a privileged user, you can reassign any task that has already been started. For example, if you are the initiator of a process, the task of selecting a signoff team, and performing signoffs are automatically assigned to you. You may want to reassign one or both of these tasks to another user. You can also assign all future tasks in the workflow to the user.

Reassigning a task moves it from the original inbox to the inbox of the recipient.

Reassign a task assigned to you

1. Click the **Inbox** tile on the home page.

2. Click the **My Tasks** tab, if not displayed.

3. Select the task that you want to reassign.

4. Click **Manage** > **Reassign** on the primary toolbar.

5. Filter and select the appropriate user, enter any comments, and click **Reassign**.

Reassign a task assigned to another user

1. Click the **Inbox** tile on the home page.

2. Click the **My Tasks** tab, if not displayed.

3. Click more than one task in the task list.

4. Click **Manage** > **Reassign** on the primary toolbar.

5. Filter and select the appropriate user, enter any comments, and click **Reassign**.

Reassign a task by a privileged user

1. Search for the user or select the user's name anywhere in Active Workspace (for example, from a participant or owner list).

2. In the user's profile page, click **Open Inbox** .

3. Click the **My Tasks** tab, if not displayed.

4. Select a task and click **Manage** > **Reassign Task** on the primary toolbar.

5. Filter and select the appropriate user, enter any comments, and click **Reassign**.

Reassign multiple tasks to another user

If you are the responsible party, or a privileged user, you can reassign tasks from the inbox. For example, if you are the initiator of a process, the task of selecting a signoff team, and performing signoffs are automatically assigned to you. You may want to reassign these tasks to another user. The task moves from the original user's Inbox to the Inbox of the recipient.

1. Do one of the following:

   - To reassign tasks belonging to you, click the **Inbox** tile on the home page.

   - To reassign tasks belonging to another user:

     - Search for the user or select the user’s name anywhere in Active Workspace (for example, from a participant or owner list).

     - In the user’s profile page, click **Open Inbox** .

2. Click **My Tasks**.

3. Reassign the tasks by holding down the shift key and selecting each task.

4. Click **Manage** > **Reassign Task** on the primary toolbar.

5. Filter and select the appropriate Teamcenter user, enter any comments, and click **Reassign**.

6. Upon reassignment, a consolidated email with the details of all successfully reassigned tasks is sent to the task recipient. Single emails are not sent for each task.

   Note:

   To send the multiple task reassignment email, your administrator must set the preference **WRKFLW_multitask_reassign_consolidated_email** to true.

Claim a task belonging to a team

You can make yourself the responsible party for a task that is assigned to a team to which you belong, referred to as a *resource pool*. You can also perform a task without first claiming it.

Only a user can subscribe to a resource pool. Depending on how Active Workspace is configured, the **Team** tab on the **INBOX** may not be available.

1. Click the **Inbox** tile on the home page.

2. Click the **Team** tab to view all tasks assigned to a resource pool.

3. Select a task.

   The assignee is a role and/or group.

4. Do one of the following:

   - To move the task to your **Inbox**, select the task and click **Manage** > **Claim Workflow Task** on the primary toolbar. The task is assigned to you, and you can perform it at a later time. The task will appear in your **Inbox**.

   - Perform the task by performing the embedded task function. You can perform the task immediately without first claiming it. This is useful for tasks you can perform right away.

View upcoming tasks

You can view upcoming tasks and assignments for a more holistic understanding of a workflow status using the **Upcoming Tasks** table. This table shows all pending and unassigned tasks in the workflow as well as who the tasks are assigned to.

The information most relevant in the task is displayed in the table. For example, for a single user task, the **Assignee** column displays specific information. The **Origin** column specifies the source of the assignment (whether it came from an assignment list, a project, a dynamic participant, or resource pool).

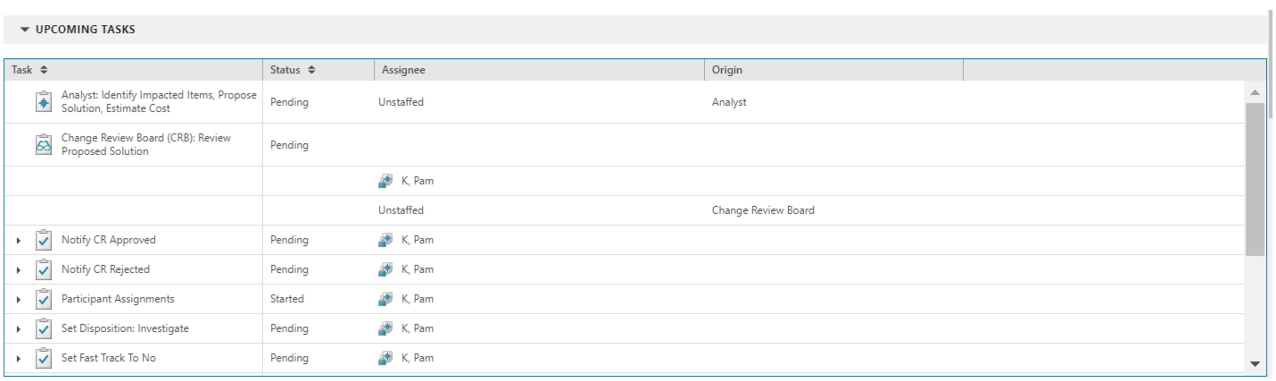
> Note:
>
> The **Origin** column only displays in Active Workspace 5.1/Teamcenter 13.1.

To view upcoming tasks and their assignments:

1. Click the **Inbox** tile on the home page.

2. Click the **Workflow** tab.

3. Click **Upcoming Tasks**. The table is collapsed by default.



Note:

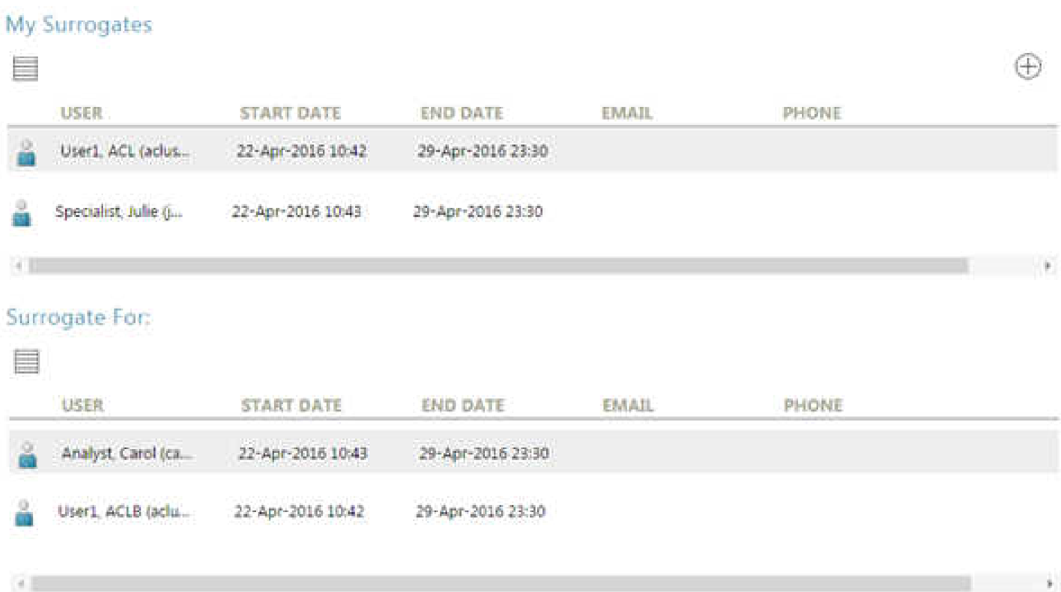
If a task is rejected or skipped, these tasks still appear in the **Upcoming Tasks** table.

See Assign users to tasks for instructions on how to use the **Upcoming Tasks** table to add or replace users assigned to a task.

Surrogates

Who are surrogates?

You can set up surrogate users or groups to perform workflow tasks on your behalf, for example, your administrative assistant or department coworkers. The tasks remain in your Inbox but your surrogate can see them and claim to stand in for you.



Any user can be designated as a surrogate. Surrogate users are automatically granted all the access privileges of the original responsible party or approver.

The tasks assigned to the surrogate appear in **Surrogate Tasks** tab of the surrogate's Inbox. The surrogate can choose to accept the tasks or release them.

If you have privileges, you can define surrogates for other users.

- Site administrators can define surrogates for any user within the site.
- Group administrators can define surrogates for any user within their group.

If you do not have privileges, you can only define surrogates for your own tasks.

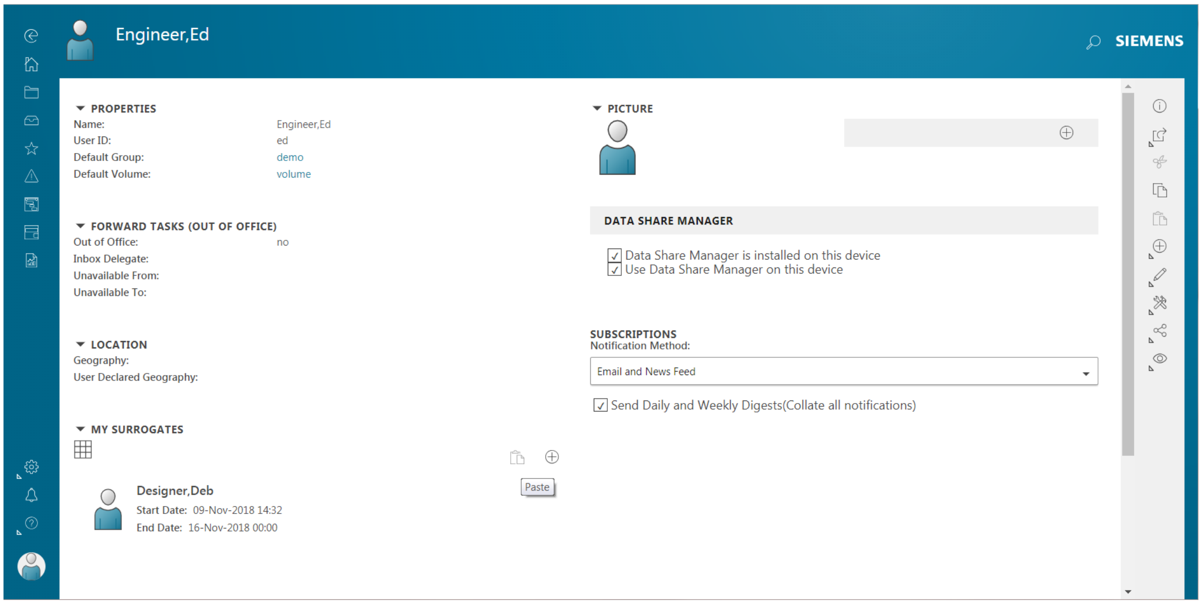
Set up surrogates

1. Do one of the following:

   - To set up your surrogates, select your name, or avatar if set up, and choose **Profile**.

   - Only privileged users can set up surrogates of another user. To set up surrogates of another user, search for the user or select the user's name anywhere in Active Workspace (for example, from a participant or owner list).

   The surrogates appear in the **My Surrogates** area of the profile.



2. Click **Add** ⊕ and in the **Add Surrogate** box, type the name of the user to whom you want to delegate your tasks. You can enter a partial name or wildcard characters.

   (Optional) You can enter date and time range for the surrogate responsibility to remain active.

   Active Workspace searches for the user and displays a list of users matching the name.

3. Select the user from the list and click **Add**.

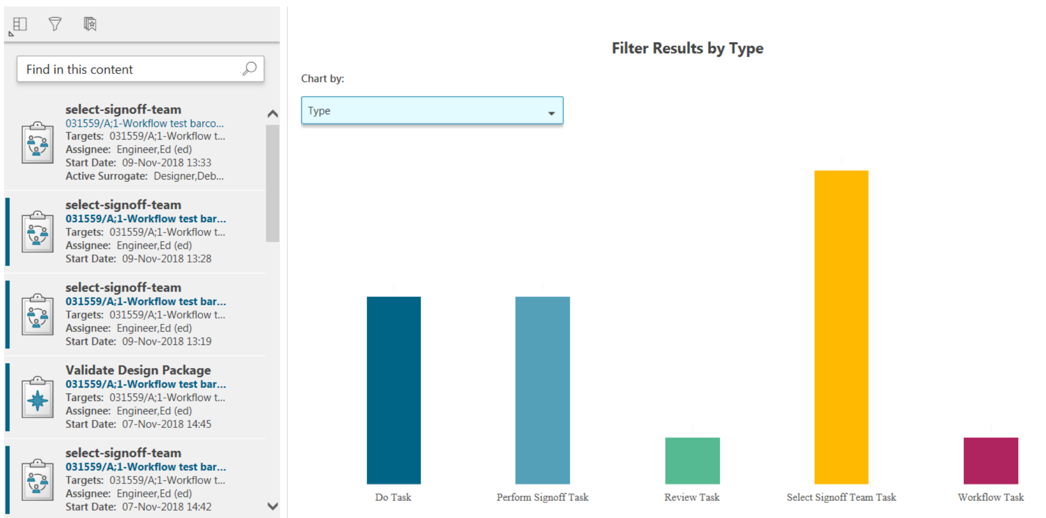
4. Click **Add** to add the surrogate.

   The surrogate appears in the **My Surrogates** area of the profile page.

Select to stand-in for a task for which you are the surrogate

Use the **Surrogate Tasks** tab to view the tasks assigned as a surrogate. Filter and sort the tasks based on the type of tasks. Then choose a task to stand-in for the original owner. When you accept to stand-in for a task, any objects checked out to the original owner are now checked out to you.

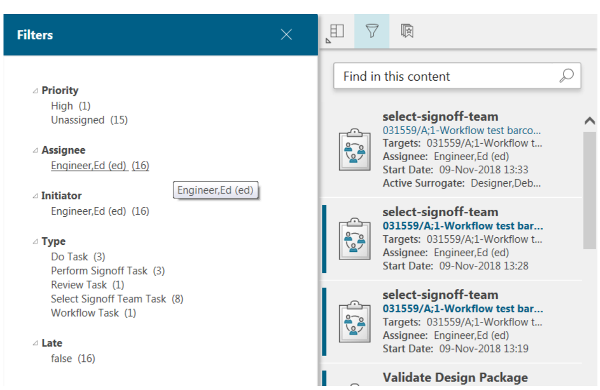
The following shows the tasks Deb sees in the **Surrogate Tasks** tab. The tasks belong to Ed, who has selected Deb as his surrogate.



1. Click the **Inbox** tile on the home page.

2. Click the **Surrogate Tasks** tab.

3. (Optional) Use **Filter** to refine the list of tasks to a particular assignee, initiator, or type of task.



4. Select a task to perform.

5. Click **Manage** > **Stand-In** on the primary toolbar. The task remains in the **Surrogate Tasks**, but contains the embedded actions for completion.

Clear surrogate designations

Depending on your privileges, you can clear the surrogate designations for yourself or other users.

1. To clear your surrogate, select your name, and choose **Profile**.

   To clear surrogates of another user, search for the user or select the user's name anywhere in Active Workspace (for example, in a participant or owner list).

   The surrogates appear in the **My Surrogates** area of the profile page.

2. Select the user you want to remove.

3. Click **Edit** > **Remove Surrogate** on the primary toolbar.

   Active Workspace removes the user as a surrogate.

Managing the tasks of other users

If you are a privileged user, you can manage the tasks of other users:

- **Manage their surrogate assignments**.
- **Reassign tasks from one user to another**.

Managing the tasks of other users helps you balance their workloads or manage assignments if someone is out of the office. As a privileged user, you can **view the Profile page of a user**, manage the user's surrogate assignments, or access their inbox to reassign a task.

Subworkflows

What are subworkflows?

Sometimes you want a workflow process to generate additional workflows as it proceeds. For example, you may want a workflow to generate additional workflows for each target of the parent workflow. This is useful if you want each target to undergo a separate review and signoff process.

Subworkflows (or subprocesses) are child workflows of a parent workflow. For example, users might want to create a subworkflow after receiving a task in their worklist dependent upon the completion of one or more tasks not tracked by the existing workflow. They create a subworkflow to track the additional tasks. In other cases, when working on a task, a user might discover that the opinion of another user would be useful. Creating an ad hoc subworkflow includes that second user as part of the existing workflow.

Subworkflows are created in two locations:

Parent workflow templates	Administrators can configure workflow templates to create subworkflows. For example, a parent workflow template can be configured to automatically launch subworkflows for each target of the parent workflow via the **EPM-create-sub-process** handler (see Create a Subworkflow for details).
My Worklist	Generally, any user can create an ad hoc subworkflow from a task within their worklist. This functionality is not limited to privileged users. When you create a subworkflow from an in-process task in your worklist, you create a dependency between the selected task in the parent process and the newly created subworkflow. If a subworkflow is created from an in-process task, the task cannot be completed until the subworkflow is completed. Regardless of how these two preferences are set to control the inheritance of target objects from the parent workflow, users can always manually remove targets from subworkflows.

Consider the following when working with subworkflows:

If the parent workflow is dependent on the subworkflow, the parent workflow cannot be completed until the subworkflow is completed.

For example, if the **EPM-create-sub-process** action handler is used to create subworkflows for multiple targets from a parent workflow, the parent workflows are dependent on the subworkflows.

Access to create subworkflows is governed by the Access Manager **Has Class (Task)** rule and the **Task Named** access control list (ACL). The same permissions allowing you to perform the task allow you to create a subworkflow from the task.

Workflow subprocesses can be dependent or independent of parent processes, depending on the preference.

Independent of parent process

The **WRKFLW_skip_abort_on_sub_process** preference is honored only for independent subprocesses.

Set the **WRKFLW_skip_abort_on_sub_process** preference to true to skip abort of subprocess when a parent process is aborted.

Dependent upon parent process

If there is a dependency from a parent process to its subprocesses, aborting the parent will abort the dependent subprocesses, irrespective of the value of the **WRKFLW_skip_abort_on_sub_process** preference.

The default value of **WRKFLW_skip_abort_on_sub_process** is false which will abort the subprocesses along with parent process.

The **WRKFLW_parent_behavior_on_sub_process_abort** preference ensures the parent process's task proceeds after the dependent subprocess is aborted.

Open a subworkflow

To open a subworkflow, use the **Workflow** tab.

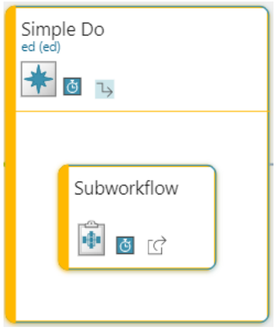
1. Click the **Inbox** tile on the home page.

2. Click the **My Tasks** tab, if not displayed.

3. Click the **Workflow** tab.

4. Scroll down to the graphical view area.

5. If a parent workflow contains a subworkflow (also known as a subprocess), click **Show Children** to switch between showing and hiding the subworkflows. The number of subworkflows is displayed next to the icon when hidden.



Start an ad hoc subworkflow

To create subworkflows while performing tasks:

1. Click the **Inbox** tile of the home page.

2. Click the **My Tasks** tab, if not already displayed.

3. Select a task to submit to a subworkflow.

4. There are multiple ways to submit a task to a subworkflow:

   - Select a task and from any tab in the **Inbox**, click **Manage**, **Submit to Subworkflow**.

   - From the **Workflow** tab:
     Select a task in the signoff or **Upcoming Task** table, and then click **Manage**, **Submit to Subworkflow**

or
In the graphical area, select a task and click **Manage**, **Submit to Subworkflow**.

5. In the **Submit to Subworkflow** panel, do the following:

   a. Select a template from the **Template** list.
   If a default workflow exists for the content type, it is automatically specified as the workflow template.
   Click **All** to view all templates in the system. Your administrator can configure the list of available templates. The template list is not case-sensitive.

   b. Accept the default subworkflow name or enter your own.
   Names are formatted as *Workflow template name : First target Name*.

   c. Enter a description for the new subworkflow.

   d. Click **Assignments** if you want to assign or replace users or resource pools to the subworkflow.
   The **Assignments** area can vary in appearance, according to what is required of the template. A table of tasks displays the task name, **Assignee**, and **Origin** columns. **Origin** specifies the source of the assignment (whether it came from an assignment list, a project, a dynamic participant, or resource pool).

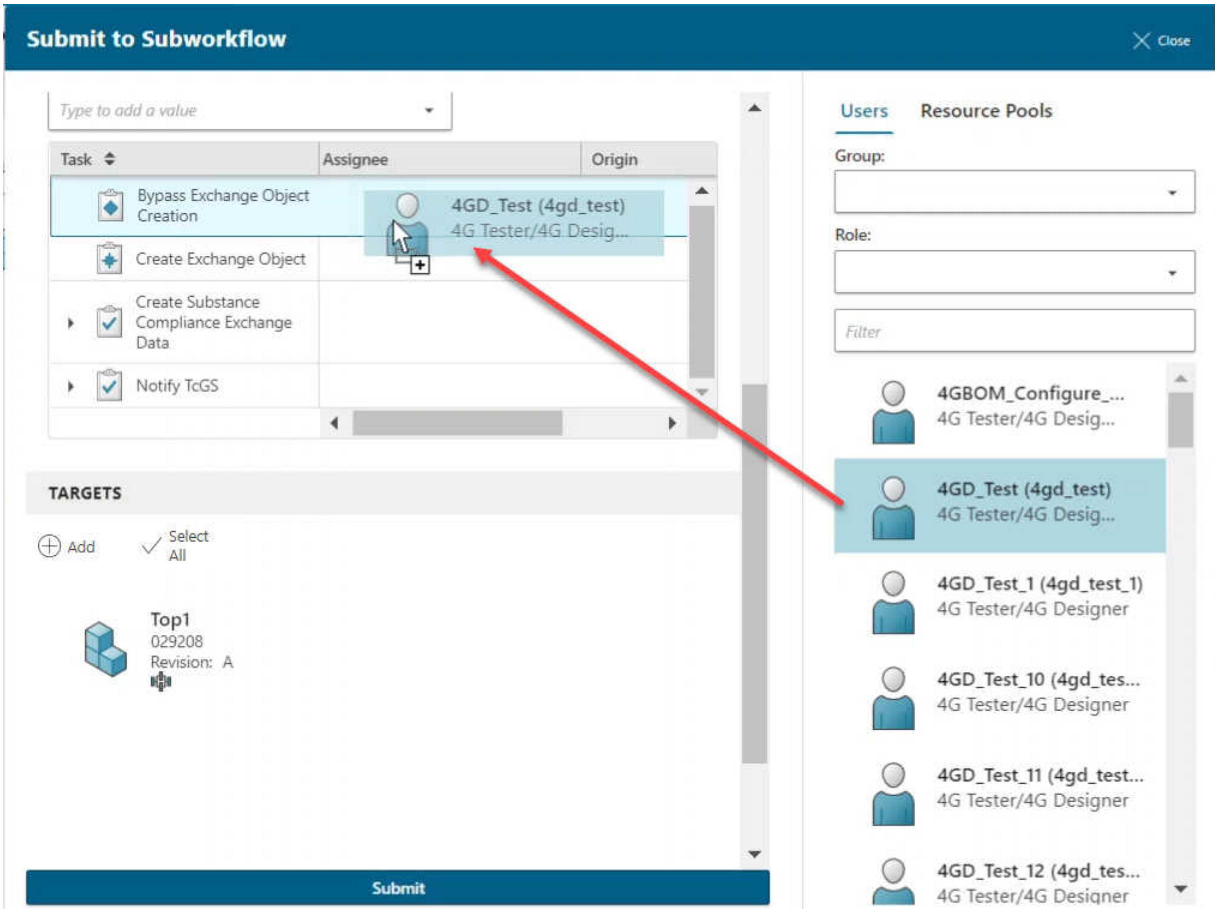
   > Note:
   >
   > The **Origin** column only displays in Active Workspace 5.1/Teamcenter 13.1.

   An asterisk is displayed next to any unstaffed profiles. Right-click and click **Remove** to delete any assignments.
   The panel expands to the right to display assignees and reviewers that you can assign to the task.

   e. Select an **Assignment List**, or lists, if any exist for the task. This list only appears when assignment lists are available to chose from.
   The assignments applied to the list(s) are displayed in the task table.

   f. In the right-hand panel, you can specify a project to filter by (if the target object is assigned to a project of which you are a member). Specify users for the task by **Group** or **Role**, as necessary. Enter a name in the text box to filter.
   Click **Resource Pools** to filter for and add a predefined team.

   g. Select a user or resource pool for the task and drag it to the **Assignee** column of the task table.

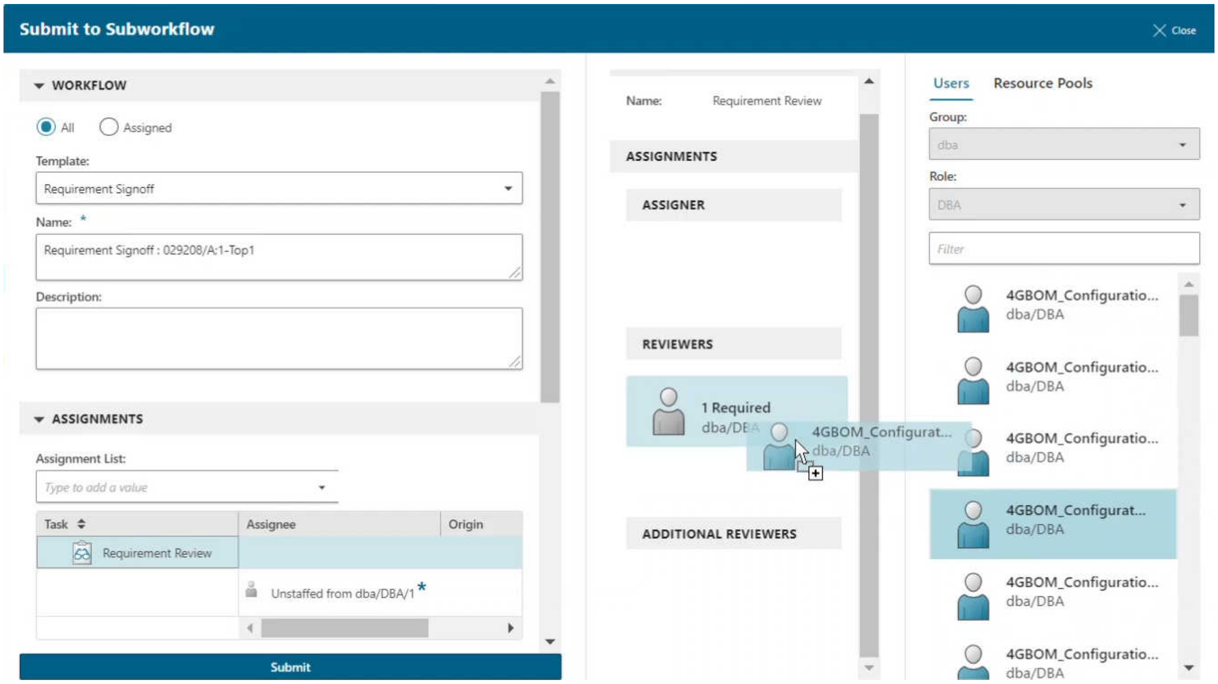


If you drag a user or resource pool to a task in the table that contains a profile, the user or resource pool is added as an additional reviewer.

Click a specific task in the table to display the middle **Assignments** category area. Drag a user or resource pool to a specific role.

For the **Review** task, if a profile is required, click the profile requirement icon so it is highlighted, then drag a user or resource pool directly over the icon. If that icon is not selected when you drag and drop, any user or resource group is added as an additional reviewer.

For example, in this subworkflow, one user from the **dba/DBA** group/role is required as a **Reviewer**.



You can also select a user or resource pool, and then click **Assign** in the **Assignments** panel. Select a user or resource pool to display the **Remove** button to remove a user or resource pool from an assignment. Click **Modify** to save changes to the assignment list.

h. Objects submitted to the workflow are displayed in the **Targets** section of the panel. To add an additional target objects(s), click **Add** ⊕. Any type of object can be added to a workflow, as there are no template restrictions.
The panel expands, and objects recently pasted to your clipboard are located under the **Palette** tab, as well as any favorites and your most recently-used items. Click the **Search** tab to filter for an object through a search. Once an object(s) is selected, click **Add**.
To remove a target object(s) from a workflow, select a target and click **Cut**. **Select All** ✓ highlights every object, while **Clear Selections** ✓ deselects the objects.

i. To add a reference, click **Add** ⊕. The panel expands, and references recently pasted to your clipboard are located under the **Palette** tab, as well as any favorites and your most recently-used items. Click the **Search** tab to filter for a reference through a search. Once a reference(s) is selected, click **Add**.
To remove a reference(s) from a workflow, select a reference and click **Cut**. **Select All** ✓ highlights every reference object, while **Clear Selections** ✓ deselects the reference objects.

j. Click **Submit**.

Suspend a task

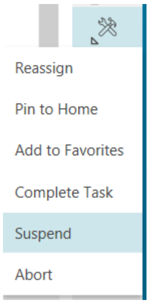
Tasks delaying completion may be suspended based on a user's needs. Suspended tasks can be resumed at any time. You may want to suspend a task due to unforeseen circumstances outside of the scope of the work or schedule.

> Note:
>
> Only users who have the correct privileges can suspend or resume a task.

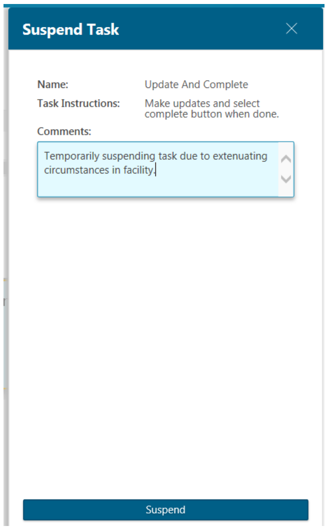
1. Click the **Inbox** tile on the home page.

2. Click the **My Tasks** tab, if not displayed, and select a task.

3. Click **Manage** > **Suspend** on the primary toolbar.



4. Suspending a task requires comments detailing the reason for the suspension. Enter the appropriate details and click **Suspend**.



The comments are shown in the **Comments** column in the **Workflow** tab, and in the **Comments** section of the **Information** panel.

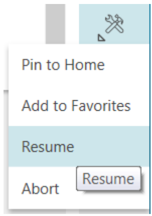
Resume a task

Only users who have the correct privileges can resume a task.

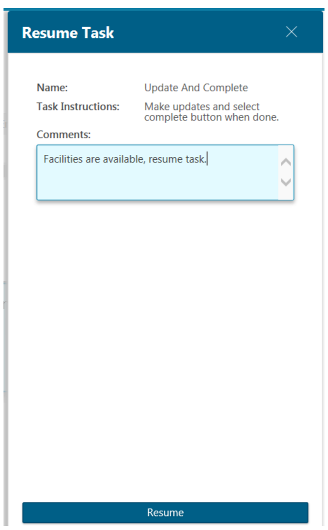
1. Click the **Inbox** tile on the home page.

2. Click the **My Tasks** tab, if not displayed, and select a task.

3. Click **Manage** > **Resume** on the primary toolbar.



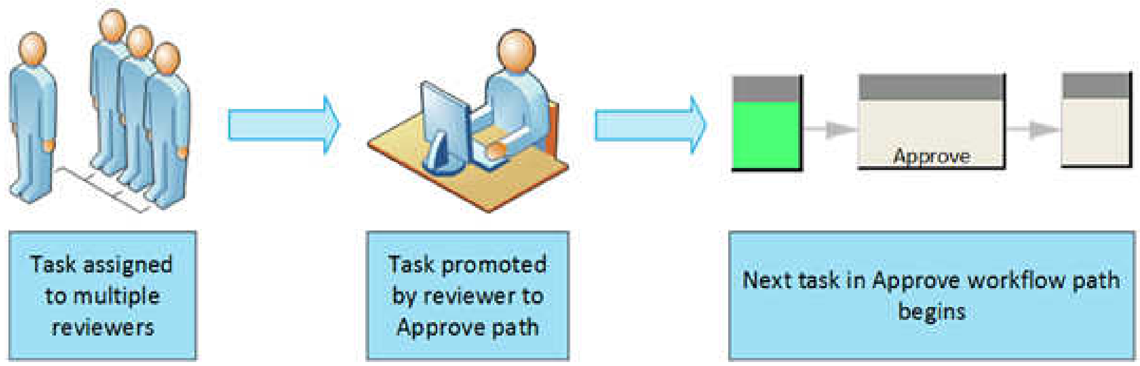
4. Resuming a task requires comments explaining the resolution. Enter the appropriate details and click **Resume**.



The comments are shown in the **Comments** column in the **Workflow** tab, and in the **Comments** section of the **Information** panel.

Promote a task

With the correct permissions, you can promote tasks to move them to the next step in the workflow. Promoted tasks, such as **Review**, **Route**, and **Do** tasks bypass reviews and move to the next step in the selected path. For example, if you have an urgent **Review** task that contains four reviewers but needs work immediately, you can promote the task along the **Approve** path to skip the other reviews and start the next task in the workflow.



1. On the homepage, click the **INBOX** tile.

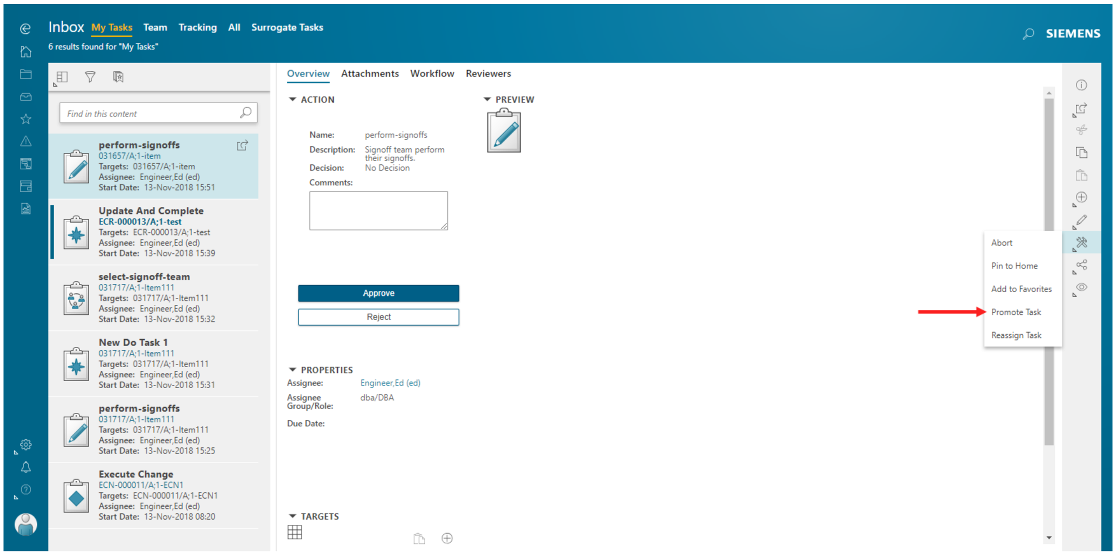
2. From the **My Tasks** tab, select the task that you want to promote.

   The task details display in the work area.

   Note:

   You can also promote a task from the **Workflow** tab.

3. Click **Manage** > **Promote Task** on the primary toolbar.



   The **Promote Task** panel appears to the right.

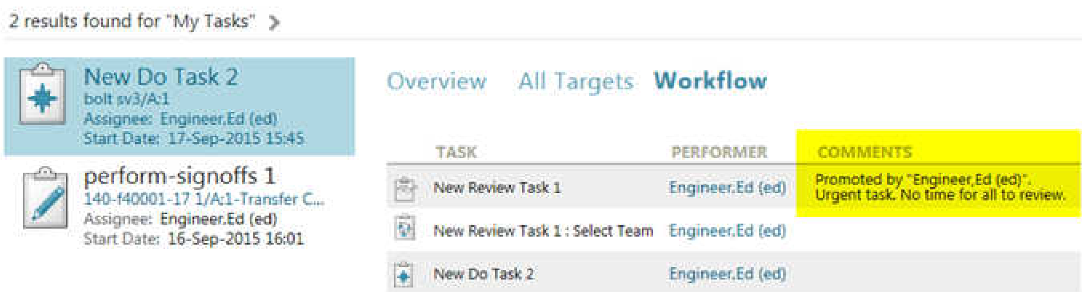
4. Select the **Path** to which you want the task promoted. This only displays for appropriate tasks, such as **Review** and **Route** tasks.

5. Enter any comments relating to the task promotion.

6. Click **Promote**.

   The task changes to **Promoted** status and moves to the next step in the workflow.

The **Workflow** tab of a task displays promote details, such as the name of the user that promoted the task, comments, and the task status.



Demote a task

With the correct permissions, you can demote individual tasks in the workflow. Demoted tasks, such as **Review**, **Route**, and **Do** tasks, revert to the previous step.

For example, if you have a workflow that contains a **Signoff** task and you would like to start over. You can demote the **Signoff** task and return to the initial task in the workflow.

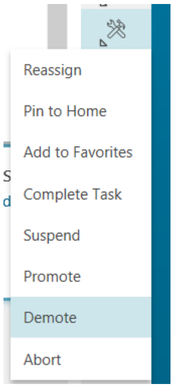
1. On the home page, click the **Inbox** tile.

2. From the **My Tasks** tab, select the task that you want to demote.

   The task details display in the work area.

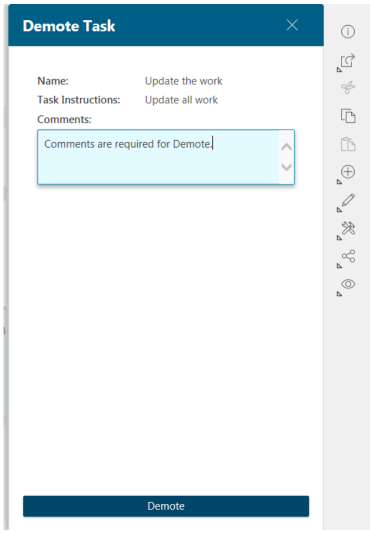
   > Note:
   >
   > You can also demote a task from the **Workflow** tab.

3. Click **Manage** > **Demote** on the primary toolbar.



The **Demote Task** panel appears.

4. Comments are required before the **Demote** button is enabled. Enter comments relating to the task demotion.



The comments are not stored in the task and do not appear in the workflow. The comments do appear in the audit log, **Process History**, and **Signoff History** report.

5. Click **Demote**.

When a task is demoted the workflow reverts to the previous task.

Perform assigned tasks

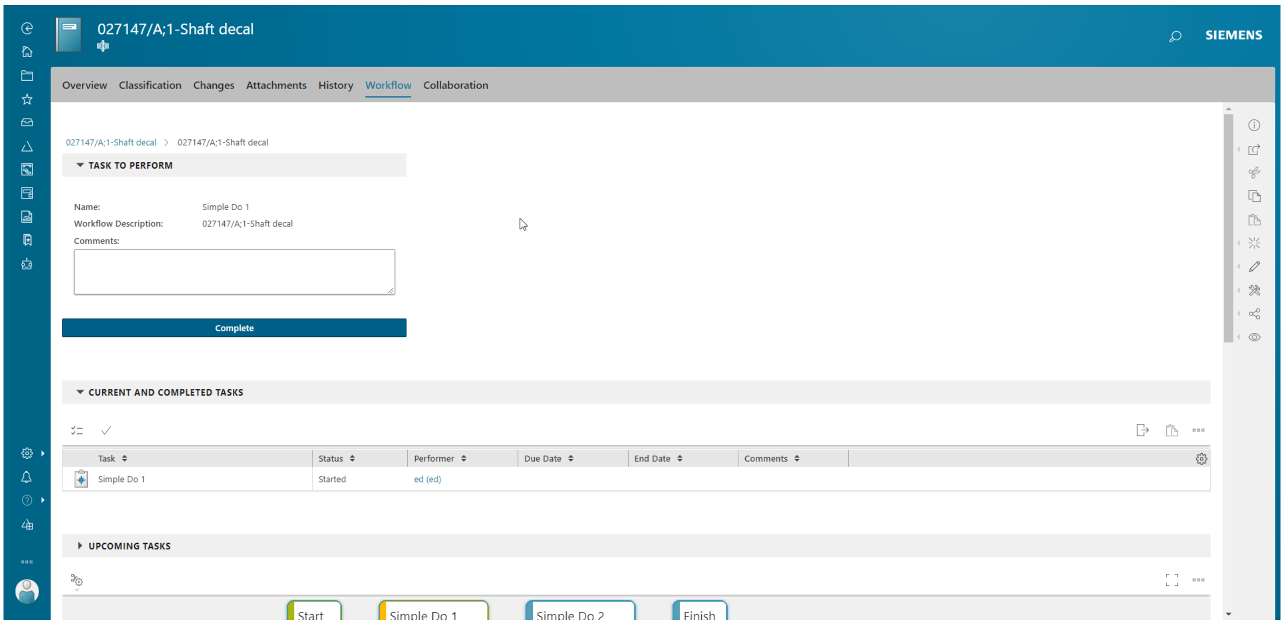
In addition to performing an assigned task from your inbox, you can perform a task in the **Workflow** tab of an object, in the **Overview** tab of a change, or in the **Changes** △ **Actionable** tab.

Perform a task in the Workflow tab of an object

You can perform an assigned task from the **Workflow** tab of an object or a change.

1. Select a change or an object and select the **Workflow** tab.

   The assigned task is listed under **Tasks to Perform.**



2. Depending on the task type, follow the instructions listed and complete the task.

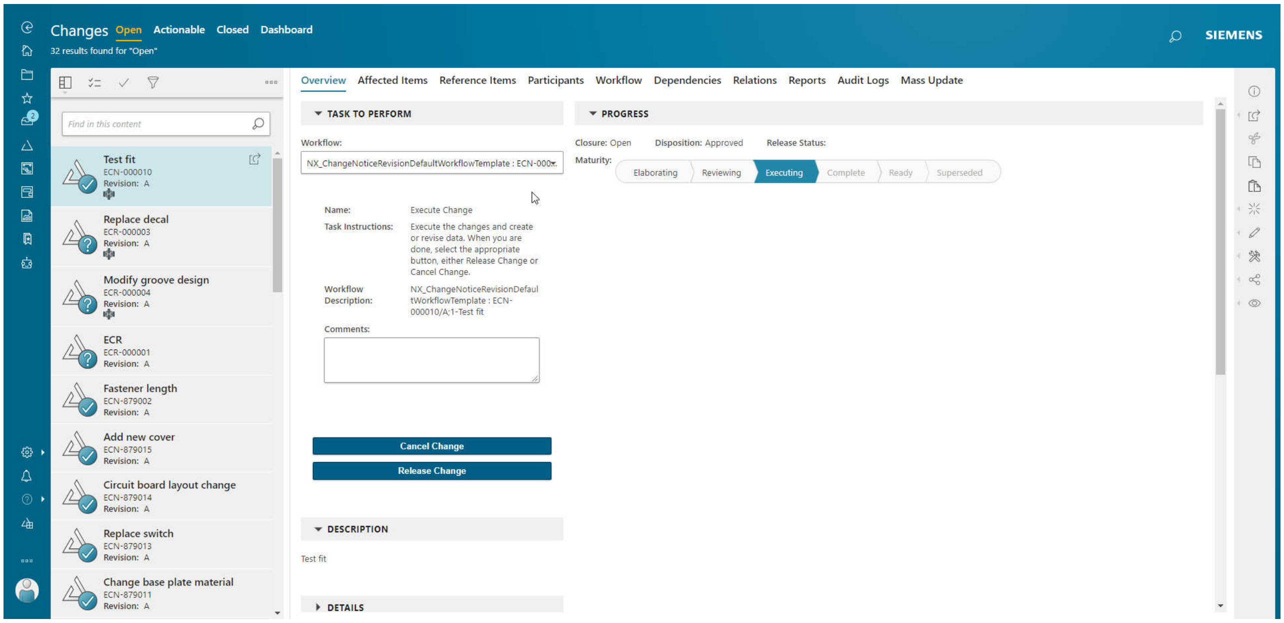
   Similarly, complete any additional assigned tasks.

Perform a task in the Changes Overview tab

1. Select **Changes** △ to view all open changes.

2. Select a change from the list. If not already selected, click the **Overview** tab.

   The current assigned task is listed under **Tasks to Perform**.

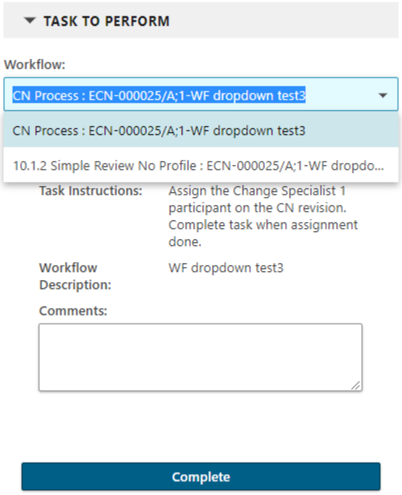


3. Review the instructions and complete the task.

   Similarly, complete any additional assigned tasks.

4. (Optional) A change object could belong to more than one workflow. The workflow list displays the name of the currently selected workflow.

   Select a workflow from the list to see the task to be performed for that workflow.



Add additional reviewers to tasks

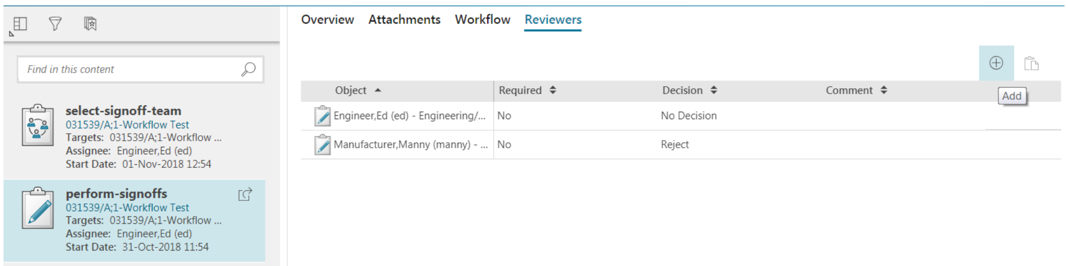
With the correct permissions, you can add additional reviewers when performing signoffs for **Review**, **Acknowledge**, and **Route** tasks.

1. On the home page, click the **Inbox** tile.

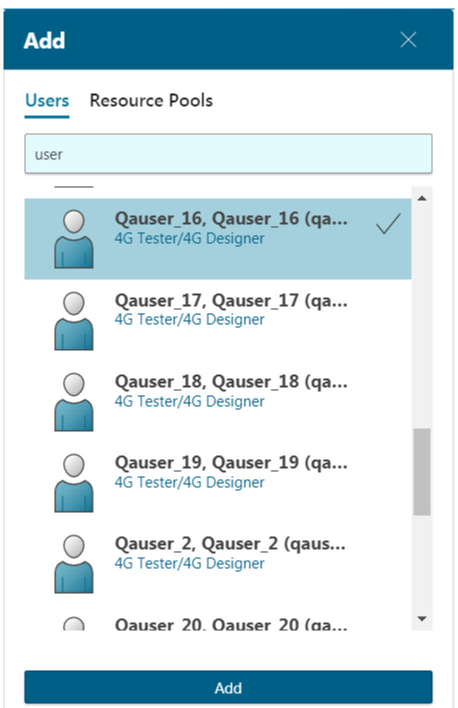
2. From the **My Tasks** tab, select the perform signoff tasks that require additional reviewers.

   The task details are displayed in the work area.

3. Select the **Reviewers** tab to view the current list of reviewers, and then click **Add** ⊕.



4. Type a name or title to filter the list of **Users** or **Resource Pools**. A checkmark appears next to each selected name. Multiple users and/or resource pools may be added this way.



- Reviewers already assigned to the task do not display in the **Add** panel. You cannot add duplicate users with the same role. However, if a reviewer has multiple roles, or belongs to various groups, they will appear in the panel, and you can add these reviewers.

- Select a group from the **Resource Pools** tab to add a team of users. Any member of the assigned team can perform the review. You can add the same resource pool to the task multiple times.

5. Click **Add** to add the selected users to the current reviewer's list.

   The task updates and the new reviewers display in the task details.

Abort a workflow

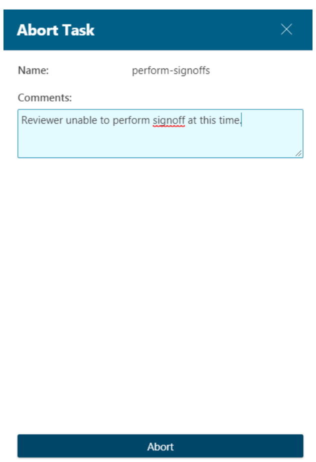
A workflow assignee or surrogate may abort a workflow any time during the process.

You can abort a workflow task from **My Tasks**. Aborting any task cancels the whole the workflow process.

1. Select a task in **My Tasks**.

2. Select **Manage** > **Abort**.

3. Enter the reason for aborting the task in the **Comments** field and then click **Abort**.



Enable remote inboxes

What are remote inboxes?

A *remote inbox* is a mailbox that is subscribed to remotely from one Teamcenter or Active Workspace environment to another. Remote inboxes let you interact with workflow tasks that originated at another site that uses Multi-Site Collaboration. Learn more about Multi-Site Collaboration in the Active Workspace Fundamentals documentation.

- When you have a user account at a remote site, you can subscribe to that site to access your Inbox, called your *remote inbox*, and access tasks assigned to you at the remote site.

- After you subscribe to your Inbox at a remote site, your local site displays a remote site link in both the **Remote Inbox Subscription** table on the **Profile** page and the **Remote Inboxes** tab in your Inbox.

When you click the link, a new Active Workspace client session is started that runs against the remote site. You can then see and perform tasks in your Inbox on this remote site.

Configuring remote inboxes

The following configuration is required to use the remote inbox feature:

- Multi-Site Collaboration, an optional feature installed by your administrator, lets you securely share and manage product data across multiple sites in your enterprise.

- **AWC_REMOTE_SITE_URL**
  This preference (set by your administrator) defines the Active Workspace hosting URLS for remote sites. It defines Active Workspace hosting URLs for remote sites. The format for specifying the hosting URL is:
  site_name::url
  For example, if the site name is "Site1" and the URL is "http://1.2.3.4:3000", then the value for this preference should be defined as:
  Site1::http://1.2.3.4:3000

- **Workflow Remote Inbox Sync**
  This Teamcenter process daemon syncs the remote Inbox(es) data from the remote site(s) where the logged-in user is currently subscribed. It wakes up at pre-defined intervals and syncs all of the subscribed remote Inboxes at the current site. You can control the syncing interval using the **TASK_MONITOR_SLEEP_TIME** preference.
  The **Workflow Remote Inbox Sync** daemon running on the remote site(s) will sync the remote Inbox data to the subscribed site(s). For example, if Site1 and Site2 are subscribed to Site3, then the daemon running on Site3 will push updates to Site1 and Site2.

Subscribe to a remote inbox

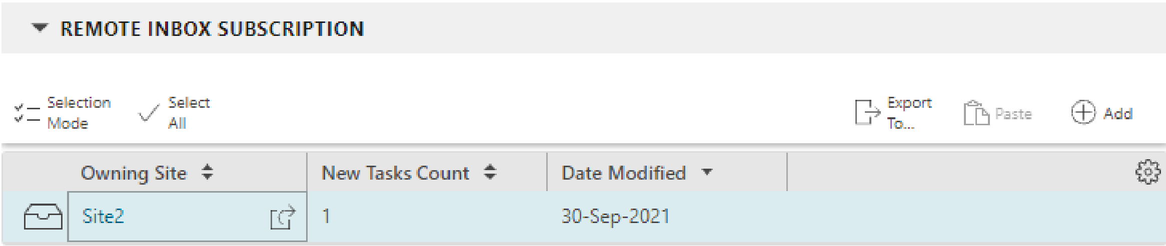
You subscribe to a remote inbox from the **Remote Inbox Subscription** table on the **Profile** page. Note that this table is only visible when the server is capable of retrieving the user's remote inbox subscription data in a multi-site environment.

1. From the global navigation, click your profile icon and select **Profile**.

2. Click **Add** ⊕ to open the list of all the sites that you can subscribe to.

3. Enter a site name to filter by or select a remote site in the **From Site** list, then click **Add**.

   The new remote site is listed in the **Remote Inbox Subscription** table.

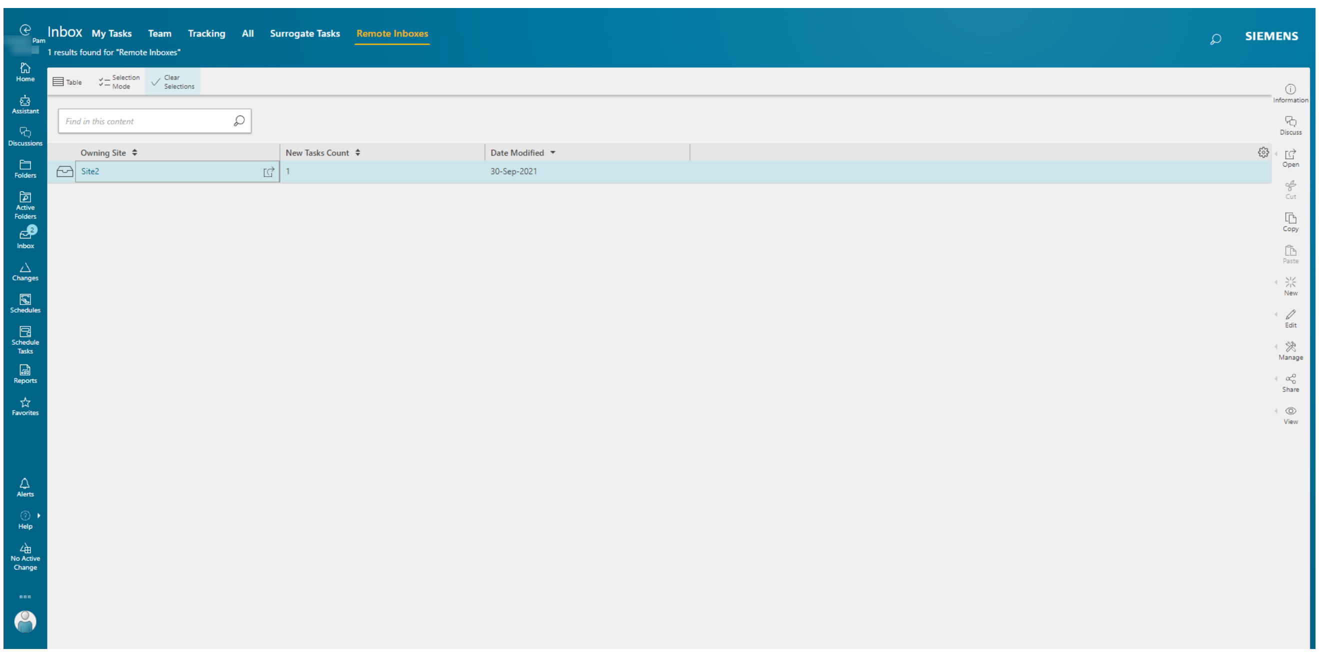


A remote inbox link is created after the subscription process that launches the login to the remote site (or performs an auto-login, if configured). Then you can view and perform any tasks that are assigned to you.

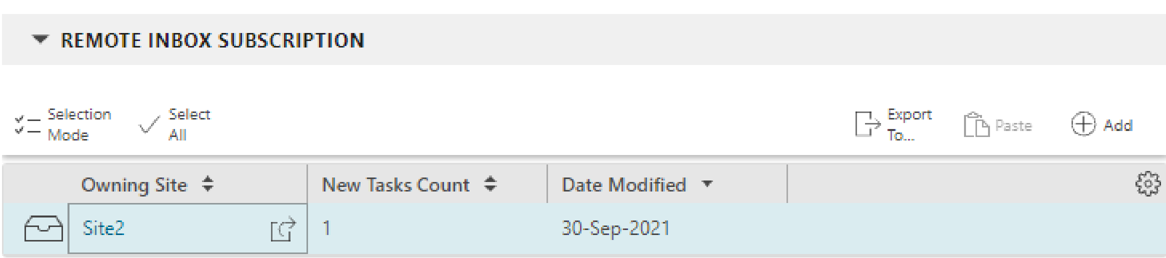
Access a remote inbox

Once you create a subscription to a remote inbox on the **Profile** page, you can access it through the following ways:

- The **Remote Inboxes** tab in the **Inbox**



- The **Remote Inbox Subscription** table on your **Profile** page



These locations contain the following information about the remote inbox:

- The **Owning Site** column lists the sites with remote inboxes to which you are subscribed. The site name link provides details about the remote site, such as its properties and audit logs.
  To access a remote inbox, click the **Open** icon next to the site name in the table, or highlight the row and click the **Open** icon from the right menu.
  This launches the Active Workspace client in a new window and lets you access and log in (or auto-login, if configured) to the remote site. Once connected, the Inbox at the remote site automatically displays to show your tasks, which you can then perform on this remote site.

- **New Tasks Count** lists the number of unread tasks in the remote inbox.
  Tasks are automatically updated in the **New Tasks Count** column at the specified intervals using the **TASK_MONITOR_SLEEP_TIME** preference. This preference sets the sleep time for the task monitor daemon and the remote inbox sync daemon. Sleep time should be an integer specifying the desired number of minutes. For example, 1 for one minute, 30 for 30 minutes, 60 for one hour and 120 for two hours.

- **Date Modified** lists the date when the subscribed Inbox was updated at the remote site.

Work with objects in remote inboxes

You can share target objects between a local and remote site with the **Share with Sites** command. This lets you access read-only replicas of data on the remote site.

You can transfer target object ownership of the object required to perform a task. You can then make modifications to the object remotely by accessing (via check out/check in) a modifiable replica of the target object associated with the tasks assigned to you.

Learn more about sharing in the Active Workspace Fundamentals documentation.

Share data from a local site to a remote site

Using the **Share with Sites** command allows you to export, then access, read-only replicas of data or transfer site ownership of the data required to perform your tasks.

1. Launch a client that has access to a remote site.

2. Locate and select an object to share.

3. Click **Share** > **Share with Sites**. The **Share with Sites** pane is displayed listing target sites and several transfer options.

4. From the **Destinations** list, check one or more remote sites to be used as target destinations when sharing the selected object. The **Destination** list filters as you type; type the first few characters of the site's name to display the site you want.

5. For **Option Set**, select the transfer option set to use when sharing objects. The transfer option set defines the configuration rules when transferring data between sites. The available option sets vary depending on your site's configuration.

6. When you click **Share** > **Share with Sites** with an object selected, you can share that item or choose to share a specific revision of the item such as the latest revision, latest working revision, latest release revision, and so on. On the **Share with Sites** pane, select the revision of the item to share from the **Revision** list.
   When you click **Share** > **Share with Sites** with a specific item *revision* selected, you can share that revision. Optionally, click **All Revisions** on the **Share with Sites** pane to share all versions of the selected item revision.

7. When you click **Share** > **Share with Sites** with an item revision selected, you can share that item along with a related configured BOM structure. On the **Share with Sites** pane, check **Include Structure** and select the revision and variant rules defining the appropriate revisions of parts and assemblies in the product structure to share.
   If you check **Include Structure** with **All Revisions** selected, the related unconfigured BOM structure is shared.

8. An item or item revision can be related to data, such as datasets, forms, folders, and other items and item revisions. Relations describe how the other data is associated with the item or item revision.
   To share related data, from the **Relations** list on the **Share with Sites** pane, check each object relation to also share with the destination sites.

9. Review and adjust the transfer options by clicking **Override Options** on the **Share with Sites** pane. The available options vary depending on the configuration of the selected transfer option set.

10. Click **Share** to share the selected object with the destination sites. You receive a notification when the transfer completes.

11. Click the **Alerts** button to see a notification that the sharing was successfully completed. Clicking this notification opens the information panel that provides additional details about the shared object.

12. Access the remote site where you exported the object to.

13. On the remote site, search for the shared object through an **Advanced Search** on the **Home** page.

Unsubscribe to a remote inbox

To unsubscribe to a remote inbox, do the following:

1. From the global navigation, click your profile icon and select **Profile**.

2. In the **Remote Inbox Subscription** table, highlight the row for the remote site and click the **Cut** icon from the right menu.

The user is unsubscribed from the remote inbox.

Error processing

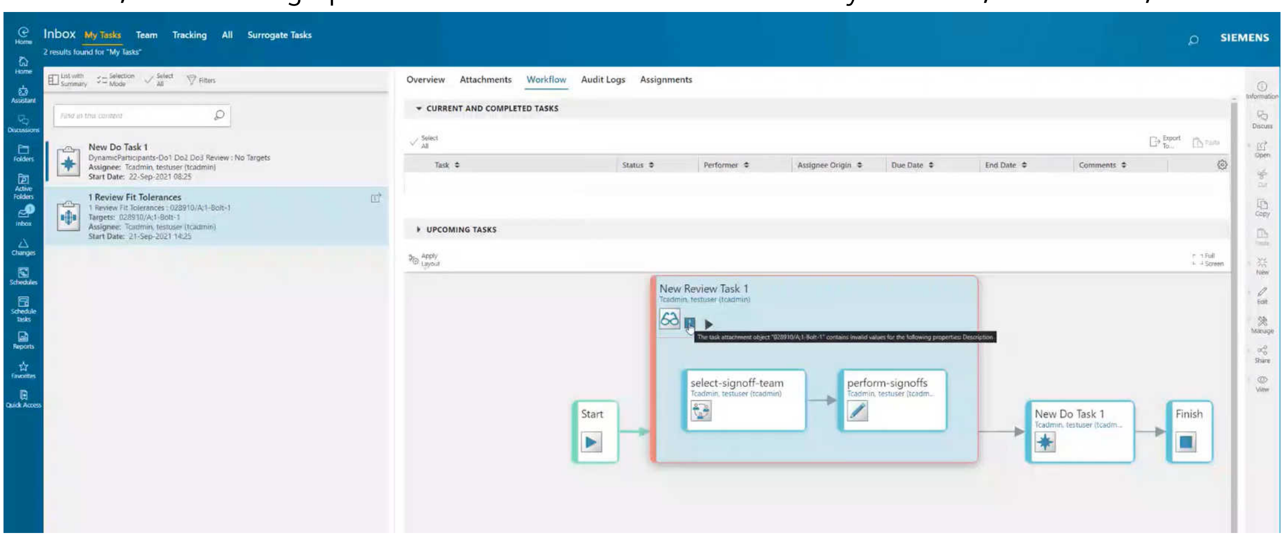
Errors may occur at any point of in the workflow process. They may be caused by a task's inability to meet handler requirements that result in target errors like missing descriptions or checkout discrepancies, or other various issues. Active Workspace lets you restart workflows that are stalled by correcting the error within the task or its subtasks.

If a current workflow task's **Complete** action fails due to an error, the task remains in the responsible party's Inbox and the user must complete the task after resolving the issue.

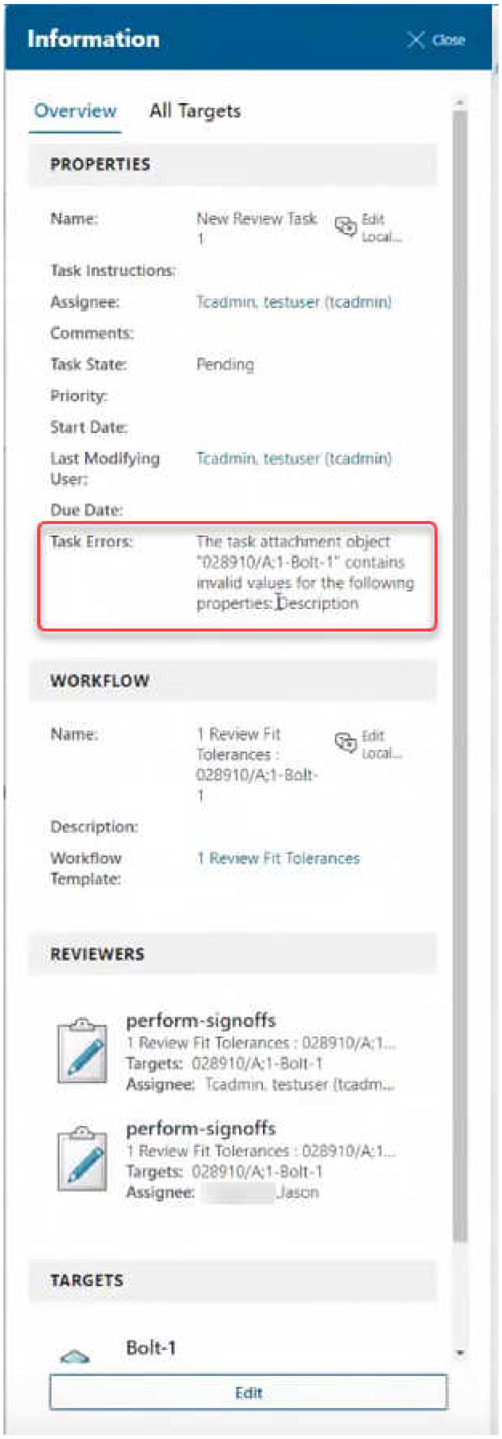
> Note:
>
> The only exception occurs when a **Validate** task's **Complete** action fails due to a workflow handler failure, and a path is configured for the error.

To troubleshoot and continue a stalled workflow with an error, do the following:

1. Identify the started or pending task error by clicking its error icon . This can be done in multiple locations, such as the graphical interface on the **Workflow** tab of your Inbox, the task list, etc.

2. In the **Information** panel, the **Tasks Errors** section identifies the missing action needed to continue the task.



In this case, the target object is missing a description.

3. Correct the error for the task.

4. Return to and complete the task. Once the task successfully completes, the workflow progress will continue.

Edit tasks outside of the inbox

Assignment lists

What is an assignment list?

Assignment lists, sometimes known as *process assignment lists* (PALs), are distribution lists associated with workflow process templates. These lists assign resources to all tasks in a workflow process. Assignment lists can be used to assign resources to single-user tasks, such as **Do** tasks, and to multiple-user tasks, such as **perform-signoffs** tasks.

When used with single-user tasks, assignments are replaced with the resources specified in the list. When used with multiple-user tasks, the resources defined in the list are appended to the resources to whom the tasks are currently assigned. However, no duplicate users are assigned (although multiple resource pools can be). In addition, multiple assignment lists can be associated with a single workflow process, providing users with multiple task assignment configurations.

An example of an assignment list is a group of reviewers who handle specific signoffs. When the assignment list is applied, the workflow automatically populates their assignments in the workflow, and assigns the tasks to their inboxes.

Assignment lists can be either *shared* or *private*.

- *Shared* lists are generated by members of the **DBA** group or by a user designated as a group administrator. These lists are available for use to all users and cannot be modified by end users.

- *Private* lists can be created by any user and are only visible to this user.

Create assignment lists

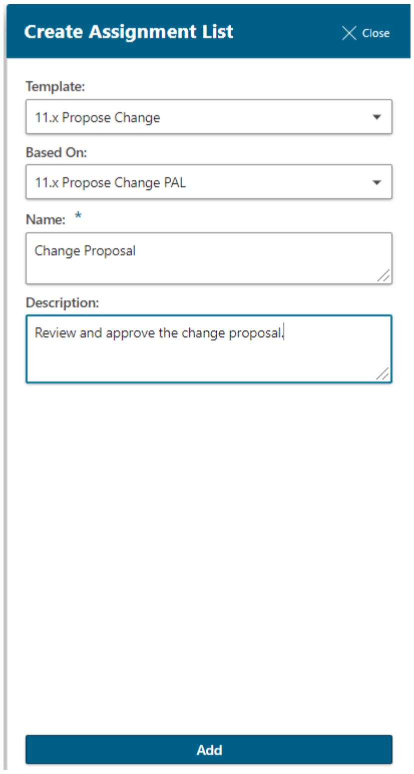
Using assignment lists helps automate assigning tasks to users, such as assigning a group of reviewers to handle specific signoffs. When an assignment list is applied to a template, the workflow automatically populates their assignments in the tasks of a workflow and assigns the tasks to their inboxes.

Assignment lists are accessed from the **Assignment Lists** tile.

Create a new assignment list

1. Select the **Assignment Lists** tile on the **Home** page to view, edit, or create new assignment lists.

2. Click **New** > **Create Assignment List**.



3. Associate a **Template** for the assignment list, select an optional list to base the new one on, add a required unique **Name**, and an optional **Description**.

4. Click **Add**.

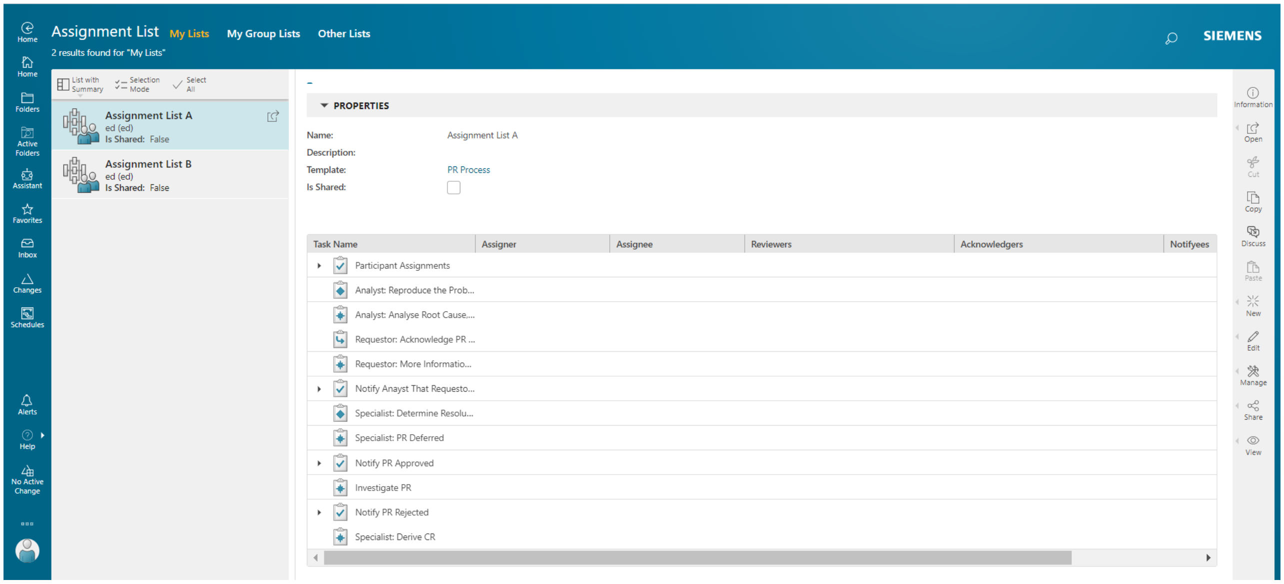
   The new list appears in the **My Lists** tab.

5. (Optional) You can select **Is Shared** to make the assignment list public.

   > Note:
   >
   > Only group or system administrators can select or edit the **Is Shared** option.

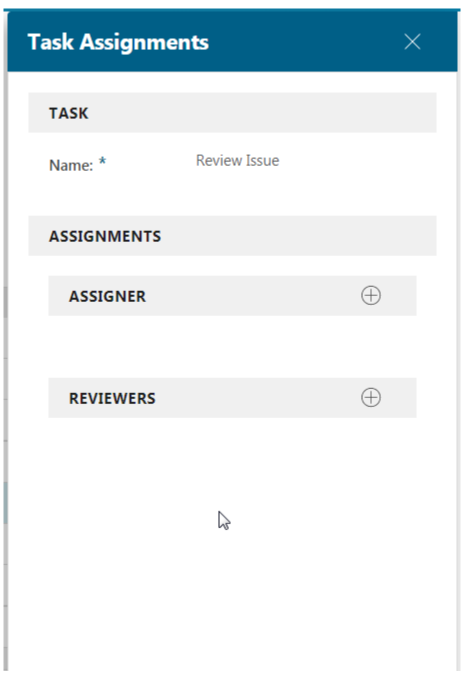
Create task assignments

1. To add users to **Task Assignments** in an assignment list, select the assignment list in **My Lists** to view the workflow tasks.



2. Click **Edit** > **Start Edit**.

3. Click a task in the task table to open the **Task Assignments** panel.



4. Click **Add** to expand the list of users.

   Reduce the list by selecting a specific **Group** or **Role**. You can also type in a specific name to filter the list.

5. Select a user and click **Add**, and then **Modify** to apply the assignment. If a task allows adding more than one assignment type, add all users and then click **Modify**.

Repeat this for each individual task assignment.

6. When you complete all task assignments, click **Edit** > **Save Edit**.

   Users appear under the correct column according to the task.

Manage assignment lists

Only group and system administrators can edit assignment lists.

1. Select the **Assignment Lists** tile to manage existing assignment lists.

2. Click **Edit** > **Start Edit**.

   You can edit the name of the list, the description, whether or not it is shared, and the task assignments. After completing the edits, click **Edit** > **Save Edit**.

3. Delete an unused or obsolete assignment list by selecting it from **My Lists**, and click **Edit** > **Delete**.

Apply assignment lists

> Note:
>
> The preference **EPM_valid_user_to_apply_assignment_list** determines the users with proper privileges to apply assignments lists. The preference can set the rights based on group, ownership, or anyone.

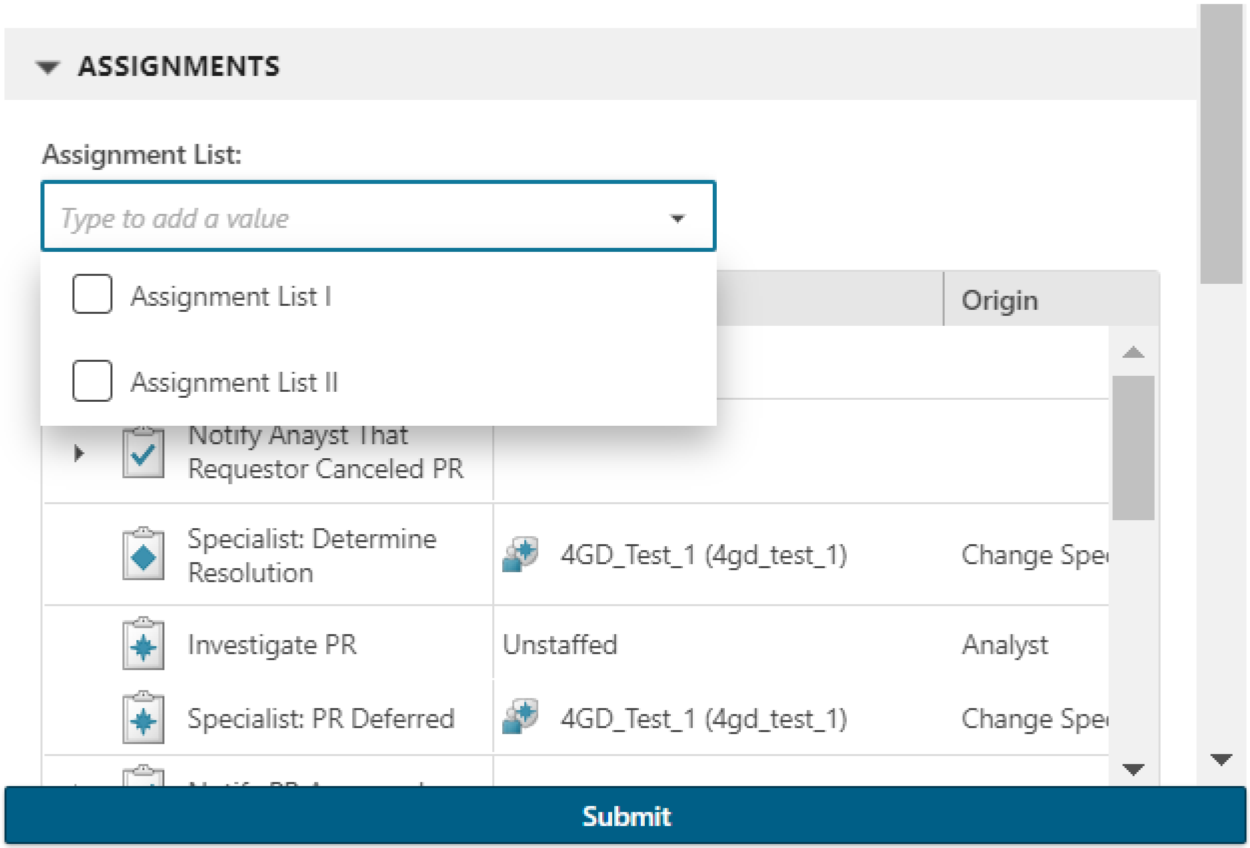
Apply assignment lists when submitting an object to a workflow

When you submit an object to a workflow, you have the choice of assigning users to individual tasks and/or add an assignment list to the workflow process.

To add an assignment list:

1. Expand the **Assignments** section of the **Submit to Workflow** dialog box.

2. Click the **Assignment List** and select the appropriate list.



The assignments applied to the list is displayed in the task table.

Any unstaffed profiles are indicated in the **Assignee** column.

Tasks can be assigned or reassigned in the task table. Drag and drop a user or resource pool directly to the **Assignee** column of a task in the table, as required. Click a task to display the middle **Assignments** panel, where you can drag and drop users or resource pools to any dynamic participants and roles, as needed. Right-click and click **Remove** to delete any assignments under the **Assignments** section of the middle panel.

For details, see **Start a workflow**.

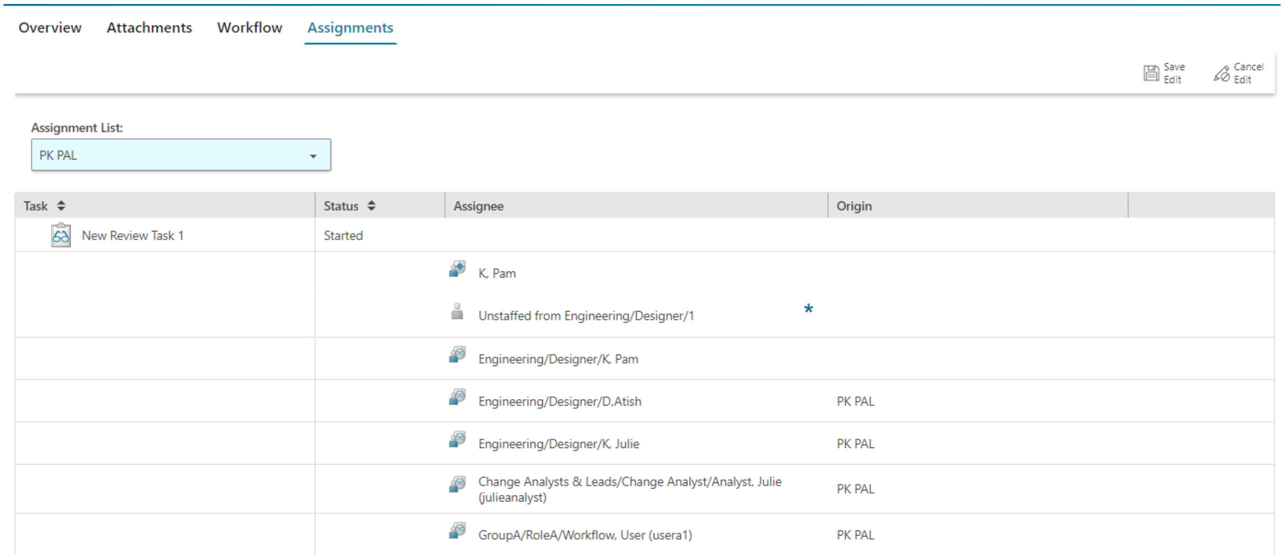
Apply assignment lists after submitting an object to a workflow

1. Select a task from the **Inbox** and click on the **Assignments** tab.

2. Select **Start edit** . This displays the **Assignment List**.

3. Select the relevant assignment list(s) from the **Assignment List** list.

   The assignments applied to the list is displayed in the task table.



Any unstaffed profiles are indicated in the **Assignee** column.

Pending tasks can be assigned or reassigned in the task table. Click a task, and then drag and drop a user or resource pool directly to the **Assignee** column of a task in the table, as required. Click a task to display the middle **Assignments** panel, where you can drag and drop users or resource pools to any dynamic participants and roles, as needed. Right-click and select **Remove** button to delete any assignments under the **Assignments** section of the middle panel.

For details, see Assign users to tasks.

4. Click **Save** to apply the changes.

Import an assignment list

You can import assignment lists into the Teamcenter database from an exported workflow assignment list file. Importing is useful for transferring assignment lists between different Teamcenter sites.

To import an assignment list:

1. Select the **Assignment Lists** tile on the **Home** page.

2. Click **New** > **Import**.

   The system displays the **Import** panel.

3. Click **Choose File** and navigate to the directory containing the exported assignment list.

4. (Optional) If you want the system to continue the transfer when one or more assignment lists fail to transfer, select the **Continue On Error** check box. In the event of this failure, the system records transfer errors in its log files, bypasses the failed assignment lists, and transfers the remaining lists.

If you do not select this option, the system stops the transfer process if one assignment list fails to transfer and only includes in the transfer the assignment lists that transferred successfully.

5. (Optional) If you want the system to overwrite any assignment lists of the same name that already exist in the database, select the **Overwrite Duplicate Assignment List** check box.

   If selected, when you import an assignment list that has the same name as one at the importing site, the assignment list successfully overwrites the one at the importing site if at least one resource is assigned to the list and a workflow template with the same **origin_id** property exists at the importing site. Otherwise, neither the assignment list nor the template is successfully imported.

   If **Overwrite Duplicate Assignment Lists** selected, an assignment list with the same name as one at the importing site is not imported.

6. Click **Import** to import the assignment list.

Importing an assignment list also imports its associated workflow template. Note the following:

- When you import an assignment list and the importing site does not have one with the same name:
  - The assignment list is successfully imported if at least one resource is assigned to it.
  - The associated workflow template is also successfully imported if a template with the same **origin_id** property does not exist at the importing site.
  - Otherwise, neither the assignment list nor the template is successfully imported.
- When the **Overwrite Duplicate Assignment Lists** check box is selected, and you import an assignment list that has the same name as one at the importing site:
  - The assignment list successfully overwrites the one at the importing site if at least one resource is assigned to the list and a workflow template with the same **origin_id** property exists at the importing site.
  - Otherwise, neither the assignment list nor the template is successfully imported.

Export an assignment list

You can export assignment lists from the Teamcenter database in XML format, storing the templates in a single export file. After exporting the assignment lists, you can import the file into the Teamcenter database at another site. You can also search the XML to determine handler and argument usage.

1. Click the **Assignment Lists** tile on the **Home** page.

2. Select one or more assignment lists to export.

3. Choose **Share** > **Export**.

   The **Export** panel appears.

4. Specify the name of the export file in the **File Name** box.

   > Note:
   >
   > The export file location is the default downloads folder of your browser.

5. (Optional) If you want the system to continue the transfer in the event that one or more assignment lists fail to transfer, select **Continue On Error**. In the case of such a failure, the system records transfer errors in its log files, bypasses the failed templates, and transfers the remaining lists.

   If you do not choose this option, the system stops the transfer process if one assignment list fails to transfer and only includes in the transfer those lists that transferred successfully.

6. Select the language that you want the assignment list to export to in the **Language List**. The assignment list will be in that language when it gets imported.

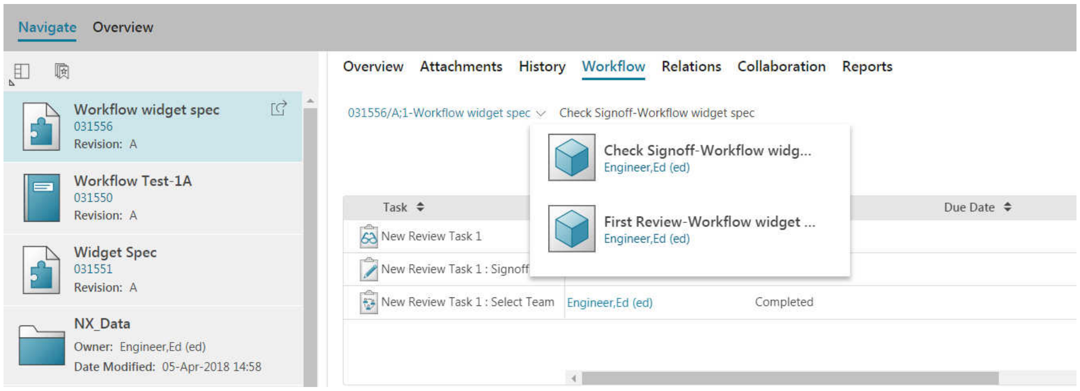
7. Click **Export** to export the assignment lists.

   The selected assignment lists are exported in XML to the file name you defined in step 4.

Viewing objects assigned to multiple workflows

When an object is in a workflow and has gone through multiple workflow processes, you can see those workflows and subworkflows in the **Workflow** tab by clicking the chevron > beside the object name in the breadcrumb.

This is useful for impact analysis if the object is in multiple workflows concurrently or if it's part of a subworkflow within the workflow.



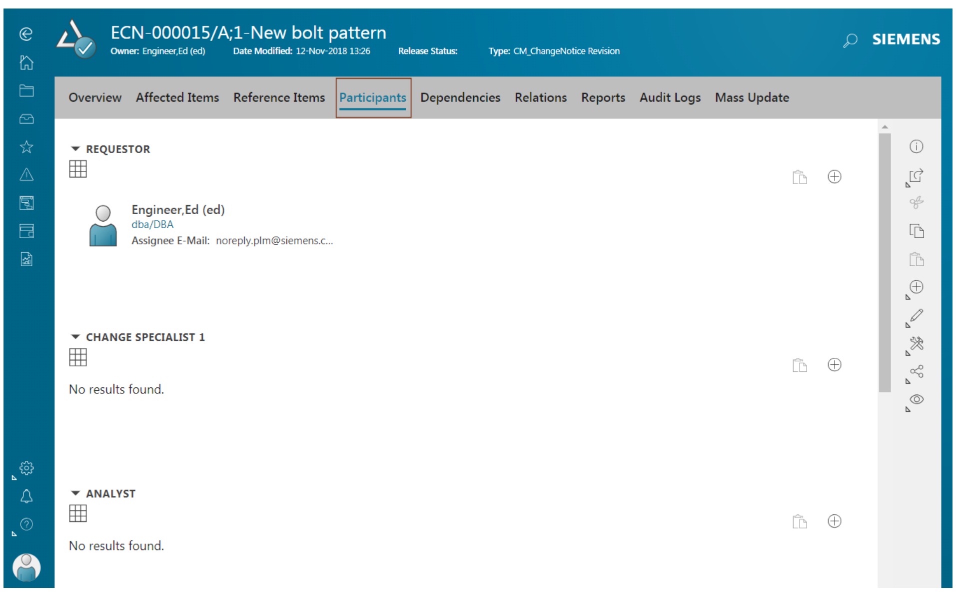
- By default, the latest active workflow is shown at the top of the list. Each tile contains the workflow name and owner.
- When you select a previous workflow tile, the associated signoff table and workflow diagram are displayed.
- When you select a subworkflow or previous workflow tile, the breadcrumb is updated.

Assign or replace participants for a workflow

Your privileges and participant type determines your ability to add or replace participants. For the same reason, not all participants are assignable because of their user privileges.

Add or **Replace** only appear if you have privileges to add or replace participants.

1. Select the object you want to assign and click the **Participants** tab.



2. Select the participant and click **Add** ⊕ or **Replace** for the participant type you want to assign or replace.

   Only users who meet the conditions for that role can be added. For example, only users in the Analyst role can be assigned as analyst.

3. Use single-select or multi-select to choose users by doing one of the following:

   - Click a user from the list of displayed users.
   - Click a group or role to select a resource pool.

- Search and select a user or group by typing the name of the user or group in the **Filter** box. When you are adding multiple users for various groups or roles, you can use search to find and add more users.

The selected user or group or role appear next to the participant type in the **Participants** tab.

> Caution:
>
> If you are in the midst of selecting users and you switch between the **Users** tab and the **Resource Pools** tab, any selections in the original tab are lost.

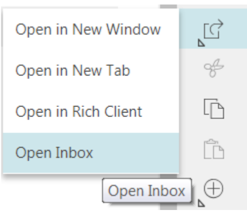
4. (Optional) You can select users for a review board in the same manner.

View another user’s profile and inbox

To help you reassign tasks, manage surrogates, or see if someone is out of the office, you can view their profile page. For example, if a workflow is not progressing because a particular user has not responded, you can view whether that user is out of the office. As a privileged user, you can also access their inbox to reassign a task.

The **Profile** page provides the following:

- Surrogate assignments
- Out-of-office dates
- (Privileged user only) **Open** > **Open Inbox** on the primary toolbar



1. Search for a user, using the user’s name, role, or program assignment. You can also select the user’s name anywhere in Active Workspace (for example, from a participant or owner list).

2. Select the user name and view the user’s profile page, for example, check if the user is out of the office and when they will return.

3. (Optional) In the **Summary** tab, under **My Surrogates**, **manage the user’s surrogate assignments**.

4. (Optional) Click **Open** > **Open Inbox** on the primary toolbar and **reassign** their tasks.

Task forwarding

Automatically forward your tasks

You can set up the automatic reassignment of any tasks that you receive during a set period of time to another user. For example, you can assign any tasks you receive while on vacation to another member of your team. If you do not enter an end date, the delegated user always receives your tasks.

> Note:
>
> Forwarding of tasks automatically stops when the end date is reached.

1. Select your name, and choose **Profile**.

2. Click **Share** > **Forward Tasks (Out of Office)** on the primary toolbar.

3. Use the **Start Date** and **End Date** boxes to specify the length of time for the delegation. If you do not set a **Start Date**, Active Workspace uses the current date and time as the start date.

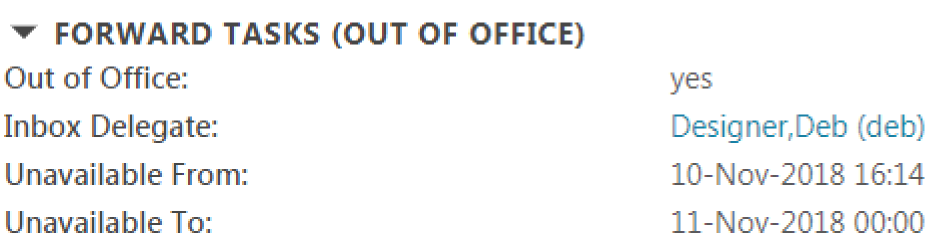
4. Click **Add** to open the **Recipient** box. Type the name of the user to whom you want to forward your tasks. You can enter a partial name or wildcard characters.

   Active Workspace searches for the user and displays a list of users matching the name.

5. Select the user from the list.

6. Click **Add** and then **Forward** to complete the process.

   Your forward delegation appears in the **Forward Tasks (Out of Office)** area of your profile page.

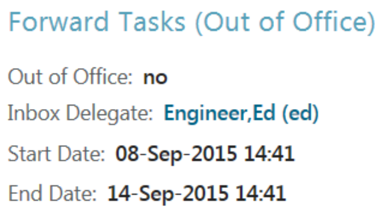
   

   > Tip:
   >
   > The **Out of Office** value is set to **yes** or **no** depending on whether forwarding is currently in effect. For example, if you set the forwarding of tasks to a future date, the value is set to **no**.

Clear automatic task forwarding

1. Select your name, and choose **Profile**.

Your delegations appear in the **Forward Tasks (Out of Office) Setting** area of your account page.



> Tip:
>
> The **Out of Office** value is set to **True** or **False** depending on whether the forward delegation is currently in effect. For example, it would be **False** if you set the forward delegation for a future date.

2. Click **Share** > **Forward Tasks (Out of Office)** on the primary toolbar.

3. At the bottom of the menu, click **Clear**.

4. View workflow progress

Workflow reports

Workflow reports in **My Dashboard** provide a quick snapshot of a workflow's status so you can view and navigate their history, audit logs, errors, and so on. This lets you determine if progress is adequate or additional steps are needed to accelerate the workflow's execution.

Workflow reports in **My Dashboard** include:

- **Workflows initiated by me**
  This report shows the status of workflows that are initiated by the logged-on user. All workflows that the user initiates are returned regardless of their state or task signoff status.

- **Workflows initiated by my groups**
  This report shows the status of all workflows that are initiated by any group the user belongs to, regardless of their state or task signoff status.

- **Workflows I am participating in**
  This report shows workflows that include the user running the report. The user is either the responsible party or a reviewer of at least one of the tasks in the workflow. All workflows that the user participates in are returned regardless of their state or task signoff status.

- **All workflows**
  This workflow administrator-related report shows all workflows that were created in the last 30 days. All workflows are returned regardless of their state or task signoff status, including those not associated with the logged-on user.

- **Workflows that need attention**
  This report shows workflows that require additional action. These may include workflows that are late, include an error, or contain non-interactive tasks that were started over a day ago.

Use the Workflow Dashboard

Open a workflow report

My Dashboard contains the five workflow-related reports that let you view and monitor workflow progress.

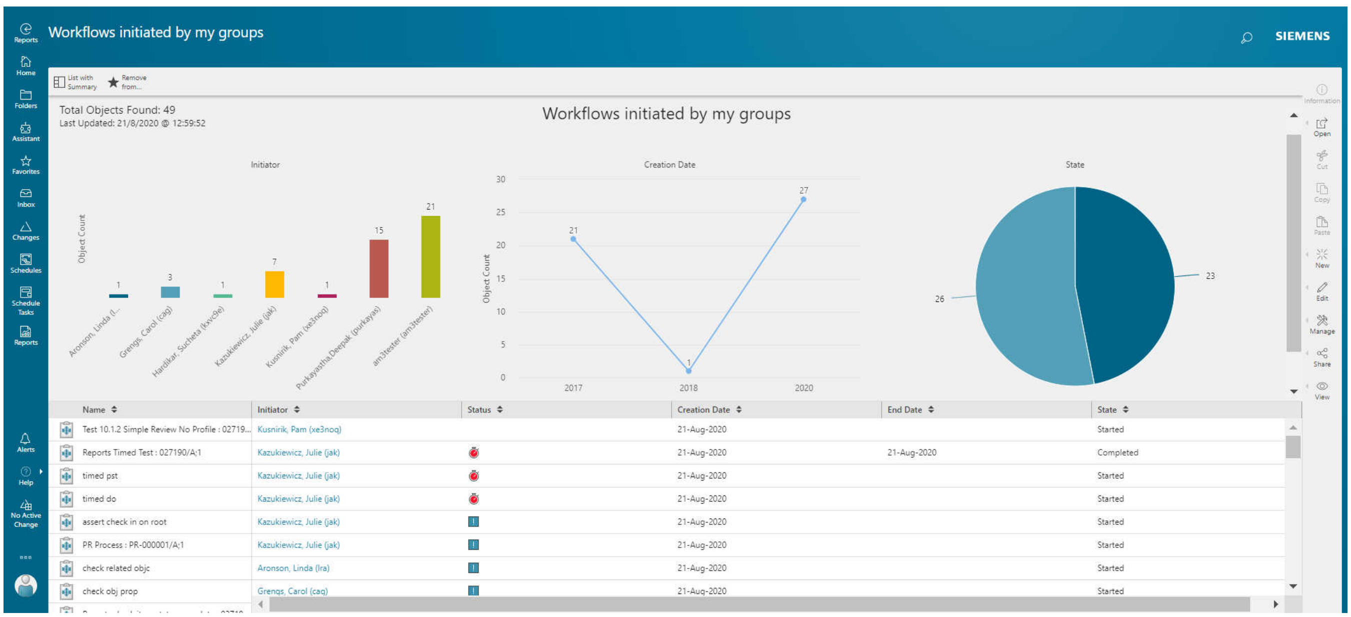
1. On the **Home** page, click the **Reports** tile.
   Reports initially are displayed as tile images to provide a snapshot of the workflow data. Click **Images** and then **List with Summary** in the upper-left corner to display the reports in a list.

2. In **My Dashboard**, click a report name to open it.
   Workflow reports include:

- **Workflows initiated by me**
- **Workflows initiated by my groups**
- **Workflows I am participating in**
- **All workflows**
- **Workflows that need attention**

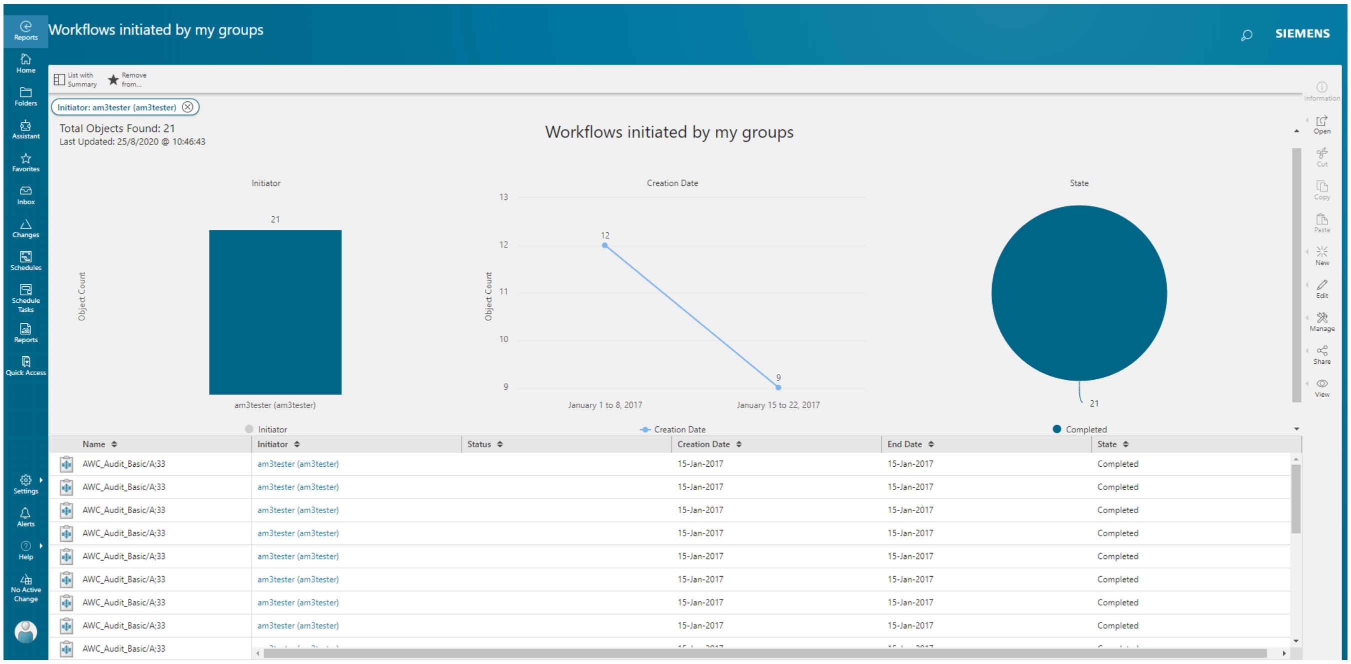
View the workflow report data

Once a report is open, you can drill down to view more specific data.



For example, in the **Workflow initiated by my groups** report, the chart and table show all workflows that have been started by groups that the user is a member of. The table displays the workflow name, initiator, status, creation date, end date, and state. Table columns vary depending on the type of report.

The report refreshes once you click an item in a chart. For example, in the **Object Count** area (left), when you click a specific **Initiator** bar in the line chart, the rest of the report filters to display information related to that specific user.



Click the initiator name in the upper-left corner to clear the filter.

The status column icons in the table indicate the following:

: The workflow includes a started task that is marked late.

: The workflow includes a started or pending task that contains an error. Hover over the icon to view the task name.

> Note:
>
> In the **Workflows that need attention** report, the **Name** column displays the task that contains an error. The icon displays the error message.

Select a row in the table and click **Information** in the primary toolbar to see more details in the **Information** panel. Additional information might include workflow properties, current tasks, and error details, depending on the workflow and its status.

Any workflow that contains the **Review** task's **select-signoff-team** subtask includes a summary of the current signoffs in the **Information** panel. The **Performer** name and **Decision** (reject, approve, or no decision) are displayed under **Current Signoffs**. In the case of a resource pool, the assignee names are displayed.

Select a row and click **Open** to view an overview of the workflow and audit log information.

Generate a Signoff History report

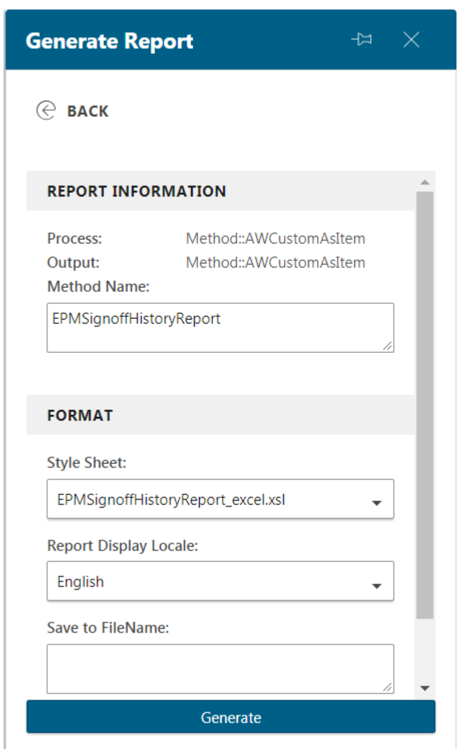
The **Signoff History** report is a comprehensive list of iterations of the signoff process. This report may include multiple processes, subprocesses, and task statuses for complex scenarios not included in the standard signoff history view.

> Note:
>
> The **Signoff History** report is not available for **Perform-Signoff** tasks.

1. You can generate the **Signoff History** report by selecting or opening a task by clicking **New** > **Generate Report** on the primary toolbar.

   > Note:
   >
   > The **Signoff History** report is not available from the **Reports** tile or the **Reports** icon.

2. Select **Signoff History** from the list of available reports, and click **Generate** to export the report to Excel.

   The amount of information in the report depends on the complexity and detail of the object. The report structure is nonconfigurable.

Object: 026127/A;1-Widget026127
Owner: ed(ed)
Date Modified: 01-Jun-2018 00:21
Release Status:

Object Display Name	Job Name	Event Type Nam	Logged Date	Task Resu	Sign Off Decisio	Task Stat	Comments
026127/A;1-Widget026127	026127/A;1-Widget026127	Start	01-Jun-2018 00:20				
EPMSignoffReview	026127/A;1-Widget026127	Start	01-Jun-2018 00:20	Unset		Started	
Review Task	026127/A;1-Widget026127	Start	01-Jun-2018 00:20	Unset		Started	
select-signoff-team	026127/A;1-Widget026127	Assign	01-Jun-2018 00:20	Unset		Pending	
select-signoff-team	026127/A;1-Widget026127	Complete	01-Jun-2018 00:36	Completed		Completed	Added three reviewers, require two approvals.
select-signoff-team	026127/A;1-Widget026127	Add Attachment	01-Jun-2018 00:35	Unset	No Decision	Started	
select-signoff-team	026127/A;1-Widget026127	Add Attachment	01-Jun-2018 00:36	Unset	No Decision	Started	
select-signoff-team	026127/A;1-Widget026127	Add Attachment	01-Jun-2018 00:36	Unset	No Decision	Started	
perform-signoffs	026127/A;1-Widget026127	Start	01-Jun-2018 00:36	Unset		Started	
perform-signoffs	026127/A;1-Widget026127	Remove Attachmen	01-Jun-2018 01:09	Unset	No Decision	Started	reassigned to Ed
perform-signoffs	026127/A;1-Widget026127	Add Attachment	01-Jun-2018 01:09	Unset	No Decision	Started	reassigned to Ed
perform-signoffs	026127/A;1-Widget026127	Approve	01-Jun-2018 01:09	Unset	Approved	Started	reassigned to Ed

Object Display Name	Performe	Performer Gro	Performer Ro	Reviewe	Reviewer Gro	Reviewer Ro	Start Date	End Date	Actual Task Durat	Due Date	Late Fla	Responsible Party N	Attachments Sent
026127/A;1-Widget026127	ed	test	tester						0d 0h 0m				
EPMSignoffReview	ed	test	tester				01-Jun-2018 00:20		0d 0h 0m		False	ed(ed)	
Review Task	ed	test	tester				01-Jun-2018 00:20		0d 0h 0m		False	ed(ed)	
select-signoff-team	ed	test	tester						0d 0h 0m		False	ed(ed)	
select-signoff-team	ed	test	tester				01-Jun-2018 00:20	01-Jun-2018 00:36	0d 0h 15m		False	ed(ed)	
select-signoff-team	ed	test	tester	mkuser1	4G Tester	4G Designer	01-Jun-2018 00:20		0d 0h 0m		False	ed(ed)	
select-signoff-team	ed	test	tester	mkuser3	4G Tester	4G Designer	01-Jun-2018 00:20		0d 0h 0m		False	ed(ed)	
select-signoff-team	ed	test	tester	qauser1	4G Tester	4G Designer	01-Jun-2018 00:20		0d 0h 0m		False	ed(ed)	
perform-signoffs	ed	test	tester				01-Jun-2018 00:36		0d 0h 0m		False	ed(ed)	
perform-signoffs	ed	test	tester	qauser1	4G Tester	4G Designer	01-Jun-2018 00:36		0d 0h 0m	30-Jun-2018 10:30	False	ed(ed)	
perform-signoffs	ed	test	tester	ed	4G Tester	4GBOM Analys	01-Jun-2018 00:36		0d 0h 0m	30-Jun-2018 10:30	False	ed(ed)	
perform-signoffs	ed	test	tester	ed	4G Tester	4GBOM Analys	01-Jun-2018 00:36		0d 0h 0m	30-Jun-2018 10:30	False	ed(ed)	