# **Assignment 5:**

1.1 Create a workflow containing two activities at org level

\* 1st activity name: Review Part

\* 1st activity participant: Designer role

\* Completion required by any of the user

\* 2nd activity name: Approve Part

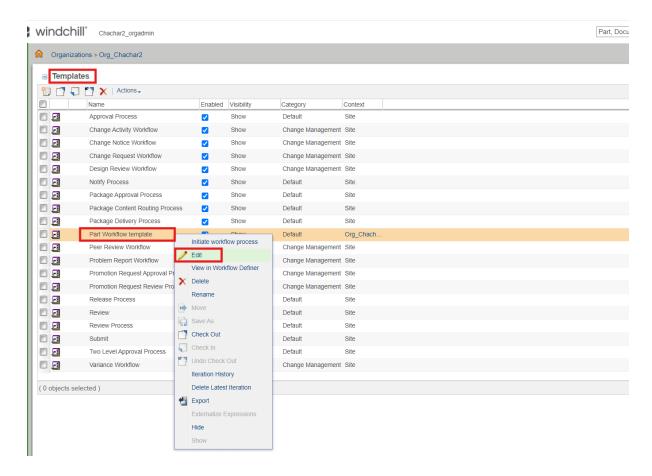
\* Participant: Approver

\* All users are required to complete this activity

#### 1.1 Ans:

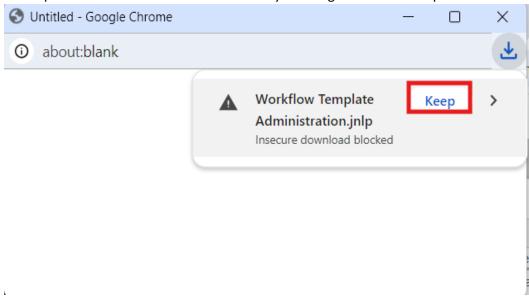
Now create workflow from simple to complex as follows:

Step 1: Login as Orgadmin (Chachar2\_orgadmin) -> under Organization -> Utilities -> Workflow Template Administration under Business Administration -> You can find the workflow you have created before in the templates.

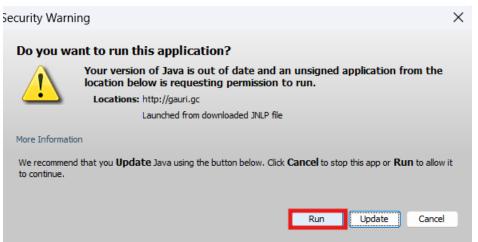


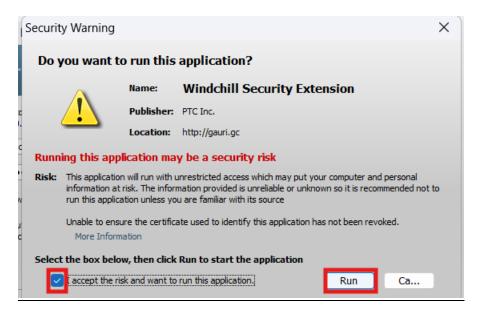
Step 2: Right click on the WF template & edit it -> Keep WF template -> Login with Java Oracle

developer -> Click on Run to allow the Security Warning to continue the process.

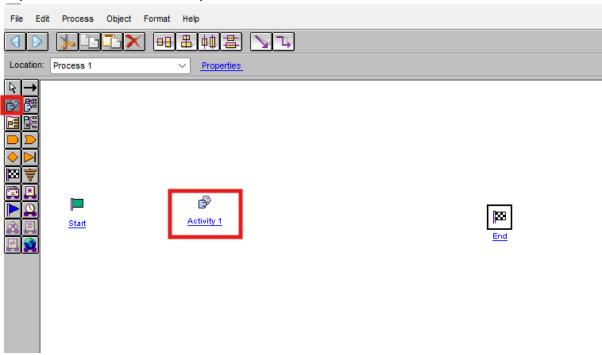








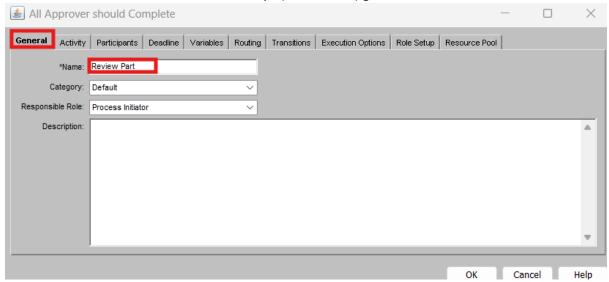
**Step 3: Create the Workflow template:** 



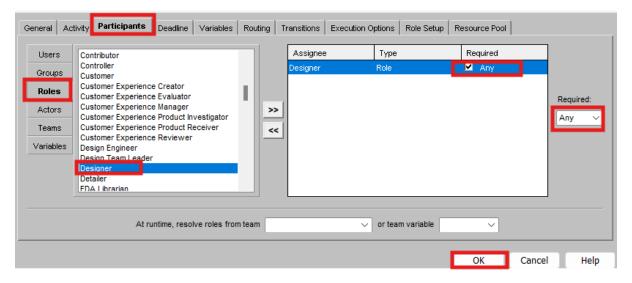
Steps as follows:

Step 3.1: Add the Activity -> Double click on Activity 1-> Activity Box Pop-ups add the details under

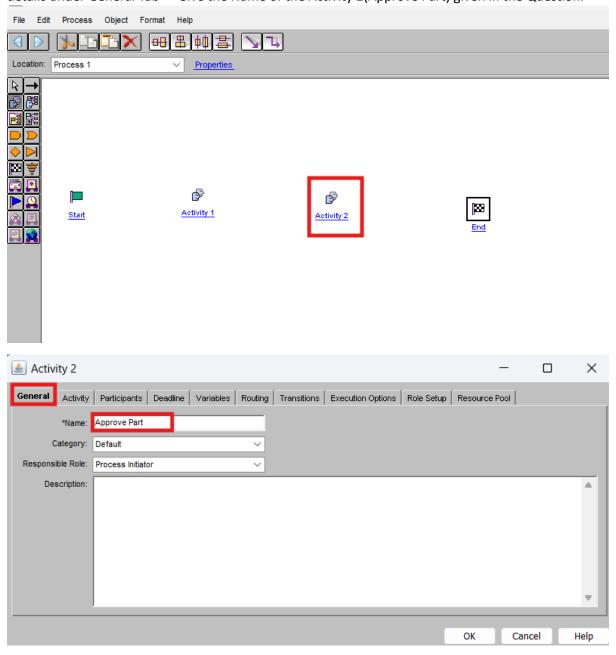
General Tab -> Give the Name of the Activity 1(Review Part) given in the Question.



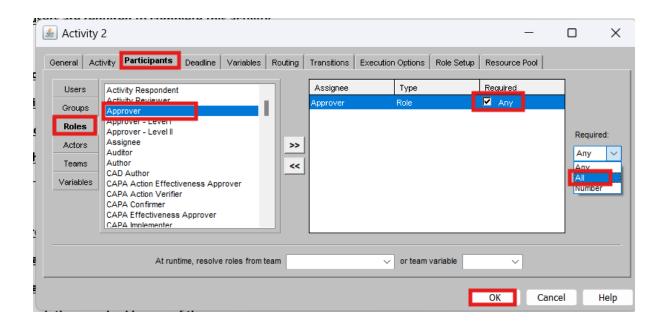
Step 3.2: Under Participants -> Roles -> Designer -> Click the check box & Add Any under Required Column, then Click on Ok.



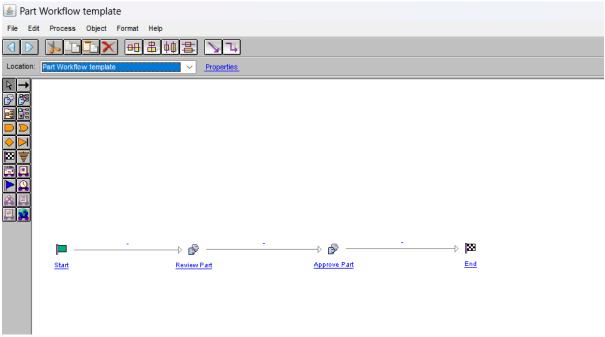
Step 3.3: Similarly Add the Activity 2 -> Double click on Activity 2-> Activity Box Pop-ups add the details under General Tab -> Give the Name of the Activity 2(Approve Part) given in the Question.



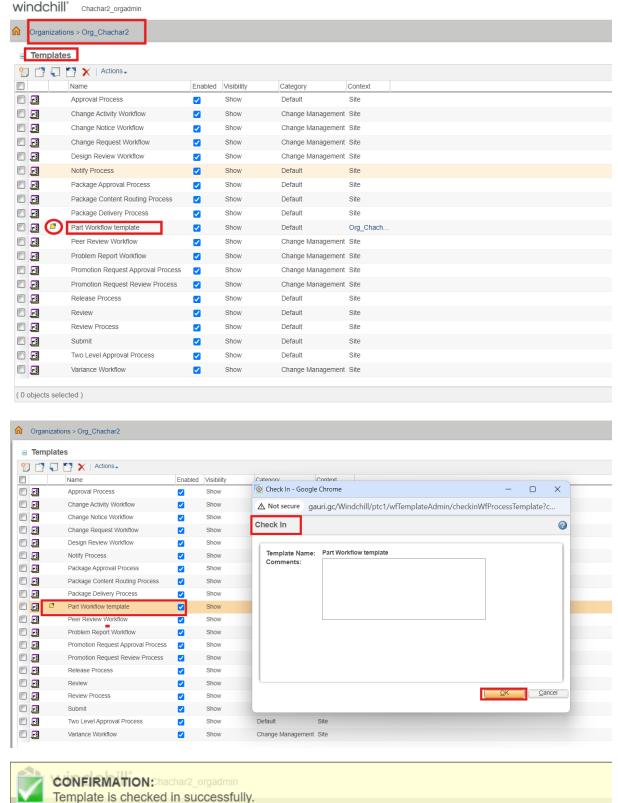
Step 3.4: Under Participants -> Roles -> Approver -> Click the check box & Add "All" under Required Column, then Click on Ok.



Step 4: The new WF template gets created as below -> Save it.

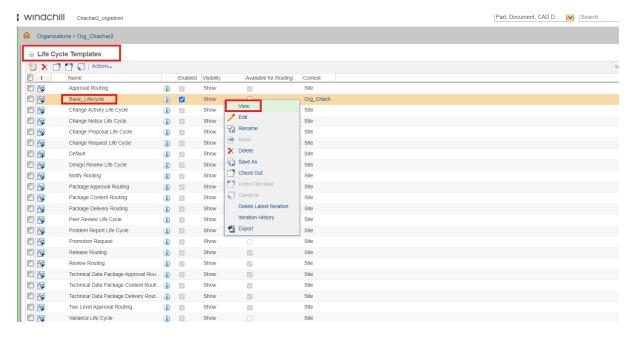


Step 5: Refresh Template page in Orgadmin -> Checkin the WF template

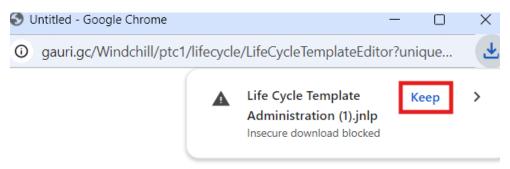


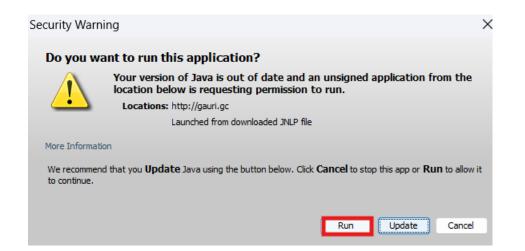
Step 6: Now check this WF template we have updated newly should reflects in Life Cycle Administration.

To check: Go to Orgadmin -> Utilities -> Life Cycle Administration -> Right Click on Life Cycle we have created -> Click on View.



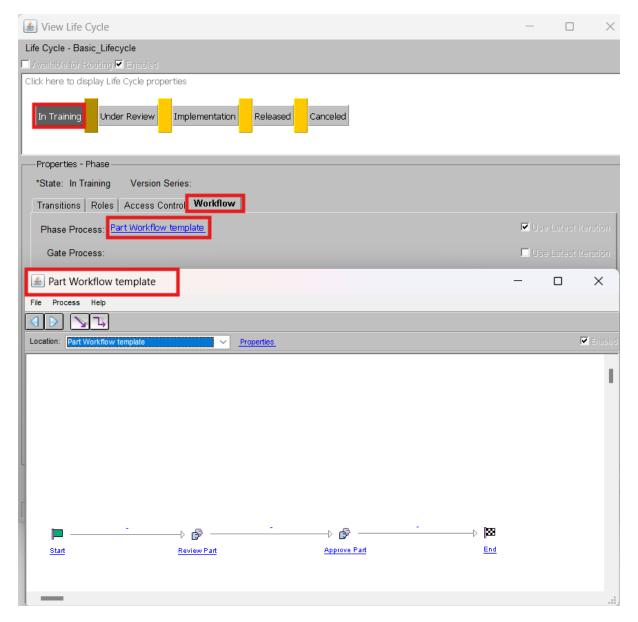
Step 7: Click on Keep -> Run the Security Warnings. Login as Orgadmin(Chachar2\_orgadmin).



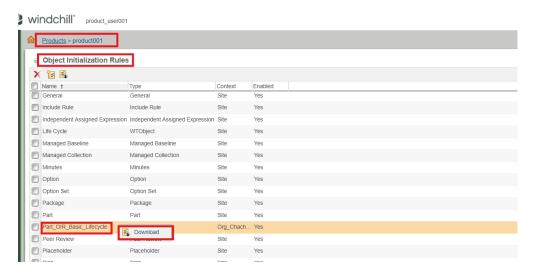




Step 8: Click on training -> Workflow -> We will find the new WF template triggered as below.



Step 9: Now Login as Product user(product\_user001) -> Utilities -> Object Initialization Rules -> find out the Life Cycle which we have created & download it -> Open it and check the Life Cycle name for WT Part.



```
<a href="https://www.part.wrpart"></a>
                 <!-- set the folder -->
<AttrValue id="folder.id" algorithm="com.ptc.core.foundation.folder.server.impl.FolderPathAttributeAlgorithm">
                <Arg>/Default</Arg>
</AttrValue>
                 <AttrValue id="lifeCycle.id" algorithm="com.ptc.core.foundation.lifecycle.server.impl.LifeCycleTemplateAttributeAlgorithm">

<
                  <!-- set the team template
                                                       ="teamTemplate.id" algorithm="com.ptc.core.foundation.team.server.impl.TeamTemplateAttributeAlgorithm">
                           <Arg>Default</Arg>
                <!-- set the number to a generated number -->
<attrValue id="number" algorithm="com.ptc.windchill.enterprise.revisionControlled.server.impl.NumberGenerator">
<!-- add a V prefix for variant parts -->
<Value algorithm="wt.rule.algorithm.BooleanBranch">
<Value algorithm="wt.rule.algorithm.EqualsTest">
<attr id="genericType"/>
<attr id="genericType"/>
<attr id="genericType"/>
<attr id="genericType"/>
<attr id="genericType"/>
<attr id="genericType"/>
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<a href="genericType"//>
<a href="genericType"//>
<a href="genericType"//
<a href="g
                                          <Arg>variant</Arg>
                        <Arg>V</Arg>
<Arg></Arg>
</Value>
                          <Arg>{GEN:wt.enterprise.SequenceGenerator:WTPARTID_seq:10:0}</Arg>
                            set the version info to a generated version info -->
rValue id="MBA|versionInfo" algorithm="com.ptc.core.foundation.vc.server.impl.VersionInfoGenerator">
                           <Arg>wt.series.HarvardSeries</Arg>
                 <Arg>variant</Arg>
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### 1.2 Now, create a team template at Organization level, name it as: Organization name\_Team

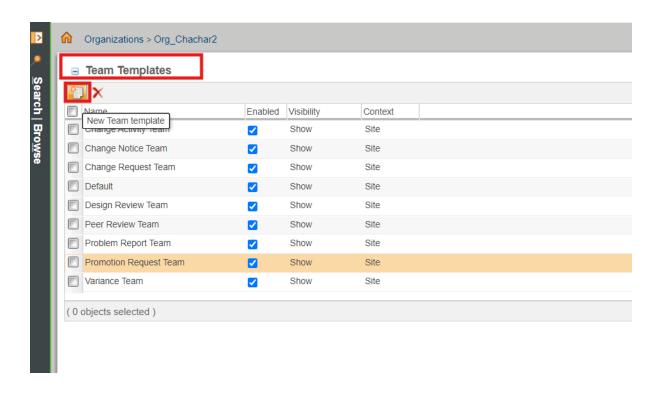
### Mention this in your part OIR

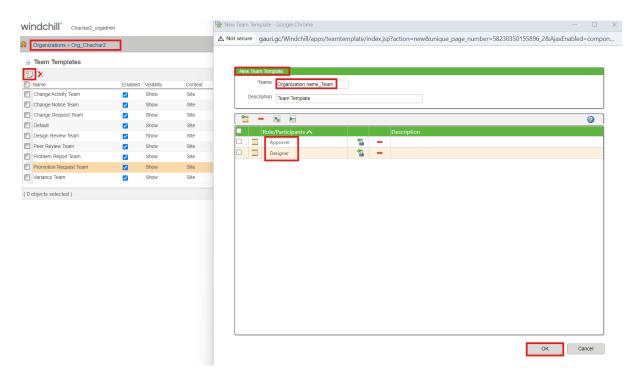
Have designer and approver in this team template.

<u>Test the workflow in different products containing different users in the context team roles and</u> make sure workflow works as expected

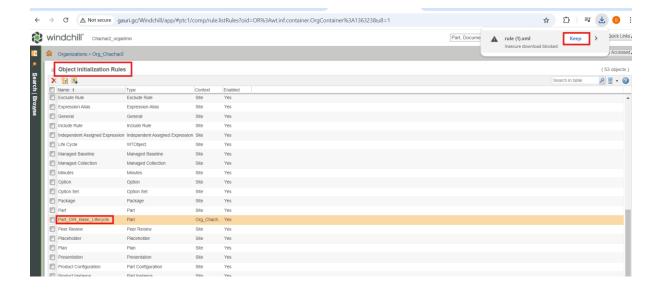
### 1.2 Ans:

Step 1: Login Orgadmin(Chachar2\_orgadmin) -> Utilities -> Team Administration -> create a New Template -> Give Name as per given requirements(Organization name\_Team) & Add RoleParticipants as per the requirements(Approver & Designer) -> click on Ok.



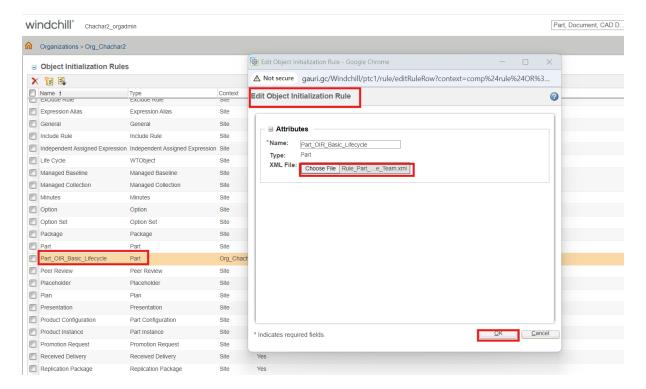


Step 2: Go to Utilities -> Object Initialization Rules -> choose the one OIR you have created (Part\_OIR\_Basic Lifecycle) -> Download -> Keep it.

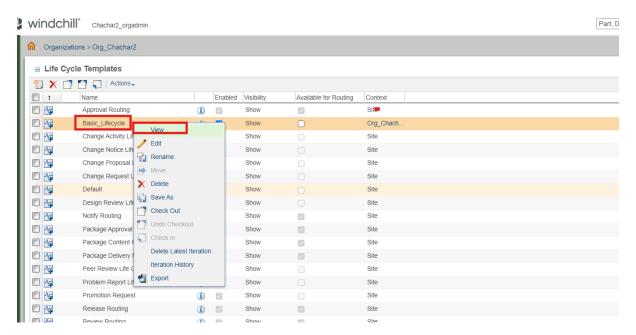


Step 3: update the new template Id: Organization name\_Team -> save this file & upload it in OIR by replace the old one to new.

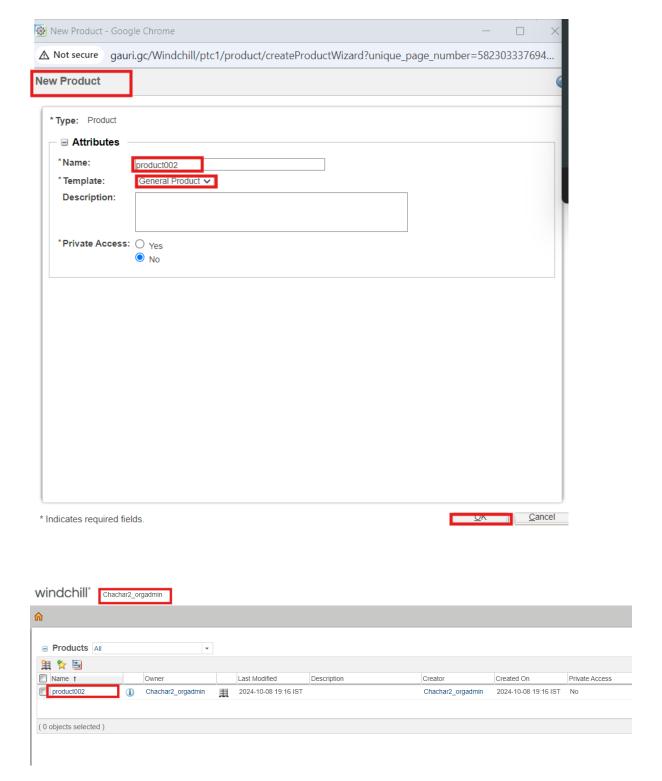
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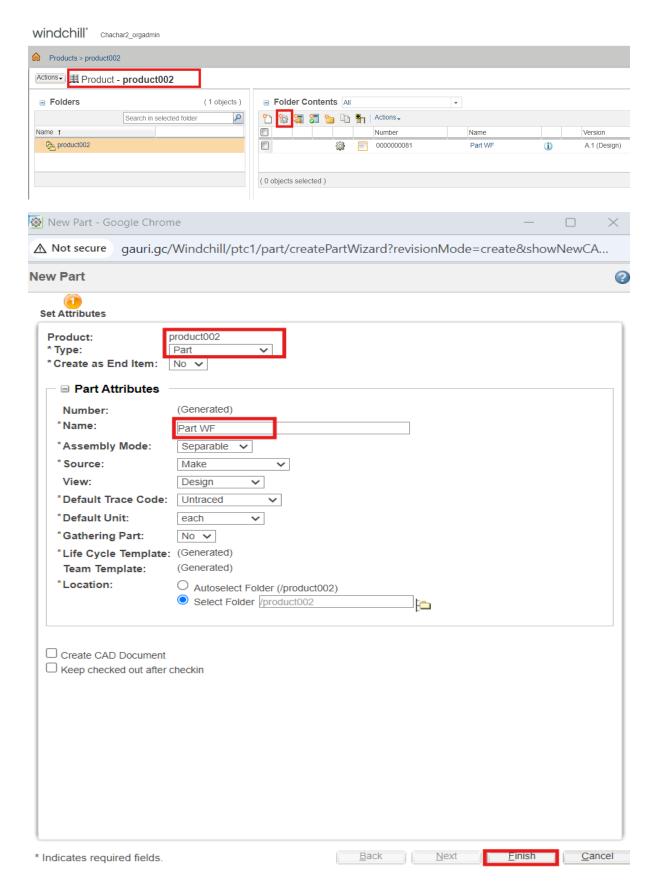
Step 4: Now check Utilities -> Lifecycle templates -> Basic\_Lifecycle -> View it -> Keep it -> the check the Workflow.



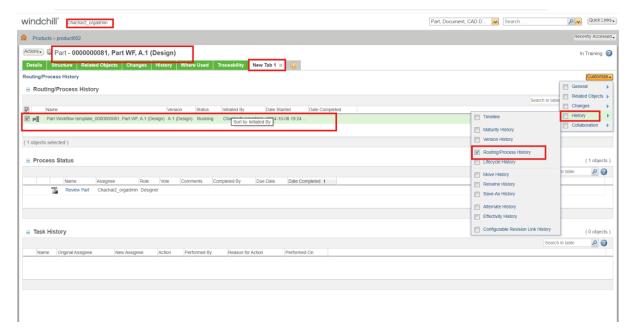
Step 5: Now create a new Product under Chachar2\_Orgadmin -> Give Name, Template -> Click on Ok. You will find the product gets created under Folder.



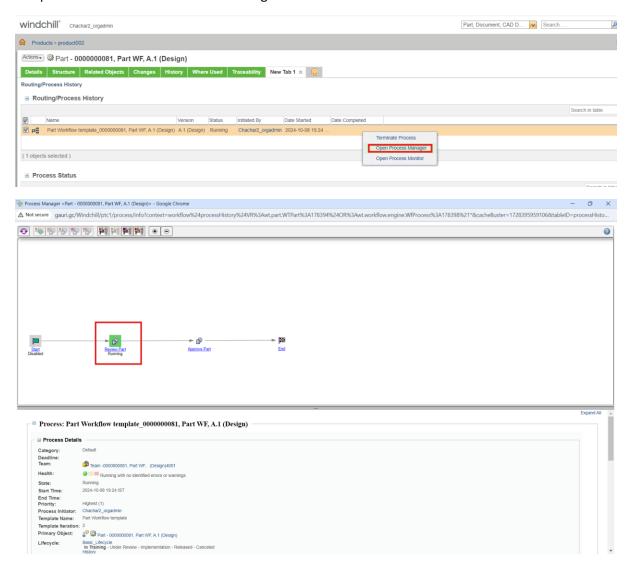
Step 6: Then Create a new part under -> Product(product002) -> Folders -> by giving Part Name -> click on Finish.



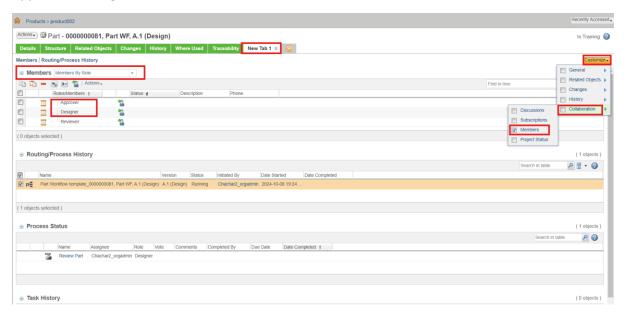
Step 7: Open the Part created newly -> click on New Tab -> Customise -> History -> Routing/Process History -> Workflow template gets added under Routing/Process History.



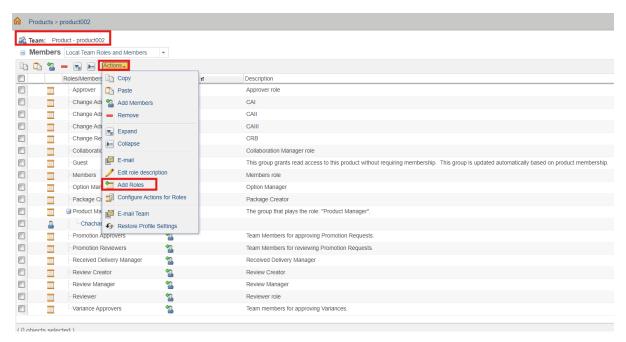
Step 8: R/C on Part Workflow template -> Open Process Manager -> Pop-up open with Workflow Template which shows Review Part Runing.

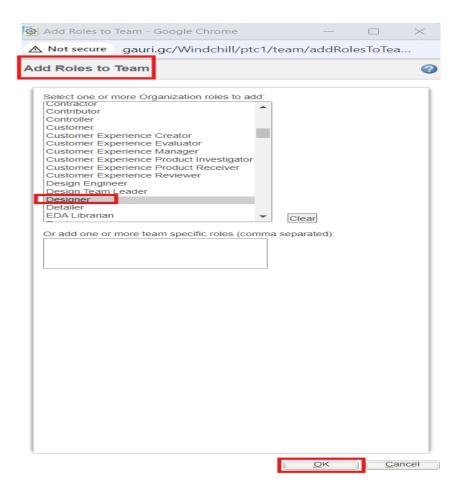


Step 9: Now add the Member under New Tab 1-> Customize -> Collaboration -> Members -> Approver & Designer.

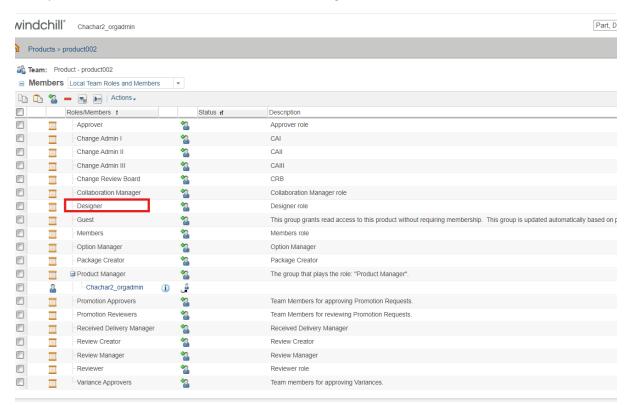


Step 10: in Orgadmin -> Prod002 -> Team -> Add Roles under Actions -> Designer Role -> Ok



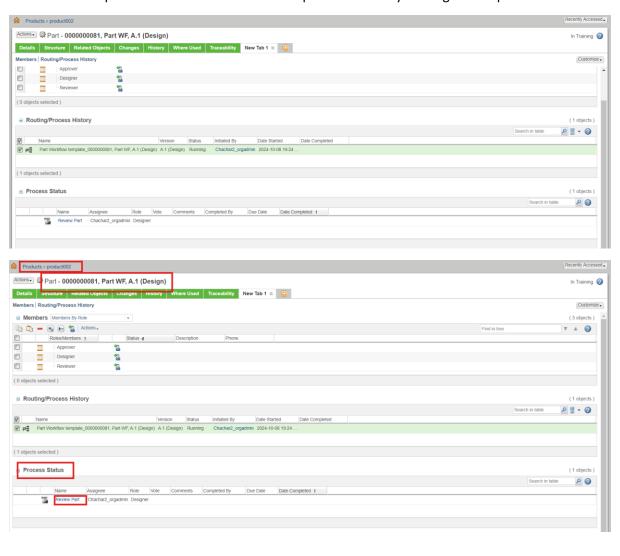


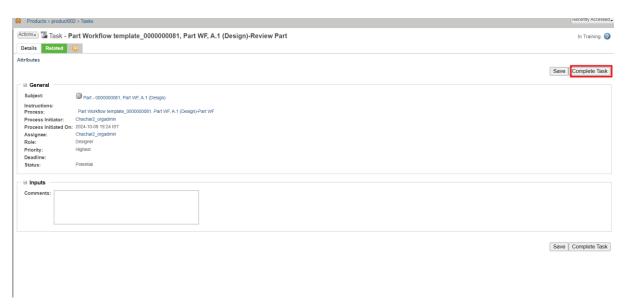
Here you will find new role added under team as Designer.



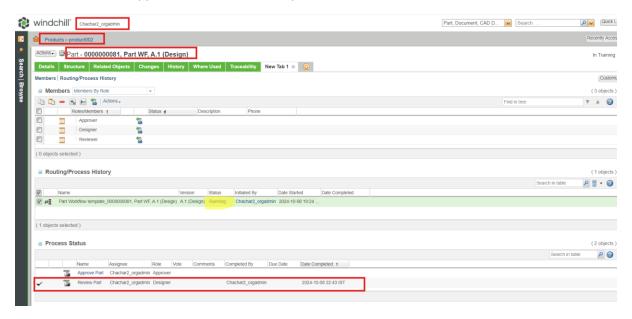
Step 11: Go to Part again -> check the Routing/Process History & Process status.

Click on Review part under Process Status -> Complete the Task by clicking on complete button

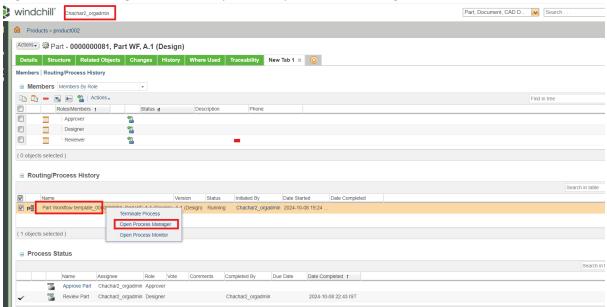




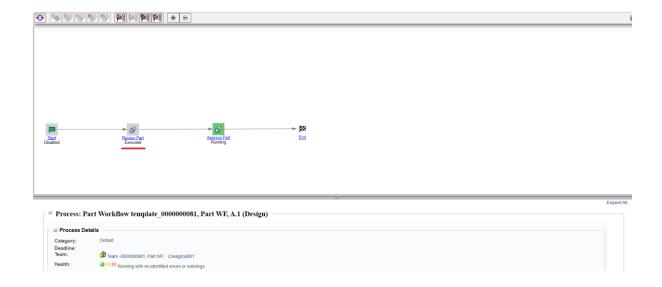
Step 12: Under Process status you find the status changed as completed & Routing showing Running status because the Approve Part needs to complete.



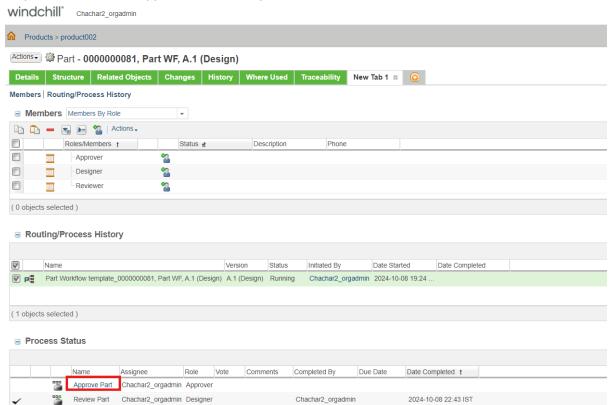
## Right click on Routing/Process History task -> Open Process Manager

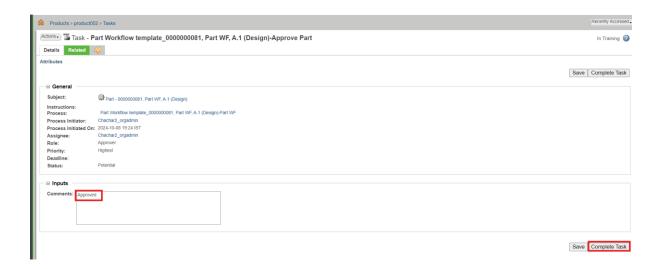


You will find the Review Part gets completed & move from Running to Executed in Workflow template as below.

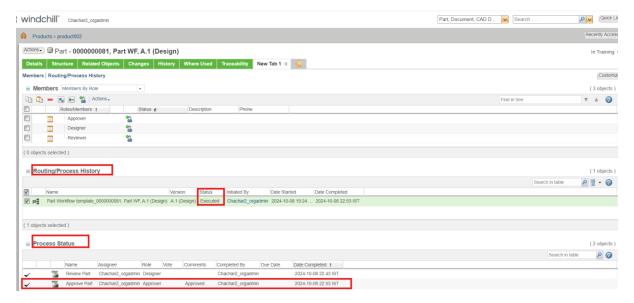


#### Step 13: Now Click on Approve Part & Complete the task.





You can find the Approve Part Completed under Process Status & Under Routing/Process History the status of the WF Template set to Executed.



You will find the Approve Part gets completed & move from Running to Executed & the Workflow gets ended (Disabled)

