

# Teamcenter Rapid Start 11.6

## Managing Product Changes in Active Workspace



# Contents

<b>Using workflows</b> . . . . .	<b>1-1</b>
<b>Workflow templates in Teamcenter Rapid Start SaaS</b> . . . . .	<b>2-1</b>
Engineering Order . . . . .	2-2
60 - Production Release . . . . .	2-3
90 - Obsolescence Process . . . . .	2-5
30 - Development Release . . . . .	2-8
Status Change . . . . .	2-10
Change Status to 10 - Rejected . . . . .	2-11
Change Status to 20 - Reviewed . . . . .	2-11
Change Status to 60 - Production Released . . . . .	2-13
Change Status to 60 - Production Released . . . . .	2-13
Un-release status 60 . . . . .	2-15
Change status to 0 (snapshot) . . . . .	2-15
<b>What are workflows and tasks?</b> . . . . .	<b>3-1</b>
<b>Working with inbox tasks</b> . . . . .	<b>4-1</b>
Inbox . . . . .	4-1
How are tasks assigned? . . . . .	4-2
Sign off on a task . . . . .	4-3
Generate a Signoff History report . . . . .	4-5
Perform a Do task . . . . .	4-6
Perform a Form task . . . . .	4-7
Set the task priority . . . . .	4-8
Reassign a task to another user . . . . .	4-9
Reassign multiple tasks to another user . . . . .	4-11
Claim a task belonging to a team . . . . .	4-12
Who are surrogates? . . . . .	4-12
Set up surrogates . . . . .	4-13
Select to stand-in for a task for which you are the surrogate . . . . .	4-14
Clear surrogate designations . . . . .	4-15
Automatically forward your tasks . . . . .	4-15
Clear the automatic forwarding of tasks . . . . .	4-16
Abort a workflow . . . . .	4-16
<b>Submitting part data and documents to workflows</b> . . . . .	<b>5-1</b>
Start a workflow . . . . .	5-1
Assign users to tasks . . . . .	5-2
View the task workflow . . . . .	5-4
Select a signoff team . . . . .	5-7
Apply assignment lists . . . . .	5-11

Add dynamic participants . . . . .	5-13
Viewing objects assigned to multiple workflows . . . . .	5-14
Add additional reviewers to tasks . . . . .	5-15
Assign or replace participants for a workflow . . . . .	5-16
Managing the tasks of other users . . . . .	5-17
View another user’s profile and inbox . . . . .	5-18
Promote a task . . . . .	5-18
<b>About engineering orders . . . . .</b>	<b>6-1</b>
<b>Create an engineering order . . . . .</b>	<b>7-1</b>
<b>Update engineering orders . . . . .</b>	<b>8-1</b>
<b>Complete the engineering order workflow process . . . . .</b>	<b>9-1</b>
<b>Add reviewers to an engineering order workflow task . . . . .</b>	<b>10-1</b>
<b>Approve the engineering order review task . . . . .</b>	<b>11-1</b>

# Chapter 1: Using workflows

*Workflow* stems from the concept that all work goes through one or more processes to accomplish an objective. Workflow is the automation of these business processes. Using workflow, documents, information, and tasks are passed between participants during the completion of a particular process.

In Teamcenter Rapid Start, you can release data using a standard workflow process or a quick workflow process.

- A standard workflow process, such as the **Development Release** workflow process, requires user interactions such as self-checks, checker assignments, and reviewer approval.
- A quick workflow process, such as the **Change status to review** workflow process, involves no additional user interaction.

The following workflow process templates are provided by Teamcenter Rapid Start:

- **30 - Development Release**

The initiator and at least one checker are participants.

The **30 - Development Release** process initially checks whether the object submitted does not have a status of **10**, **20**, **30**, **60**, or **90**.

When no status exists, the user that started the workflow reviews the work and then must assign a checker to perform a review.

- o If the checker approves the review, a status of **30** is applied to the object submitted and any data related with **Attaches**, **Specification**, or **BOMView** relations
- o If the checker rejects the review, the user must make any corrections and perform another review.

- **60 - Production Release**

The initiator and at least one checker are participants.

The **60 - Production Release** workflow initially checks whether the submitted object and to any data related with a **Specification** or **BOMView** relation has a status of **30**.

If the object or related data have a status of **30**, the workflow initiator reviews the work, approves the review, and assigns a checker to perform a review.

- o If the checker rejects the review, the user must make any corrections and perform another review.
- o If the checker approves the review, a status of **60** is applied to the submitted object and any data related with **Attaches**, **Specification**, or **BOMView** relations.

After the checker approves the review, neutral formats are created for the datasets that are attached to the submitted object, the neutral formats are attached to the object revision, and the object completes the workflow.

- **90 - Obsolescence Process** 

The initiator and at least one checker are participants.

The **90 - Obsolescence Process** begins by checking whether the object submitted and any data related with a **Specification** or **BOMView** relation has a status of **60**.

If the object or related data have a status of **60**, the workflow initiator reviews the work, approves the review, and assigns a checker to perform a review.

- o If the checker approves the review, a status of **90** is applied to the submitted object and to any data related with a **Specification** or **BOMView** relation.
- o If the checker rejects the review, the workflow initiator must make corrections and perform another review.

- **Change Status to 10 - Rejected** 

Checks whether the object submitted has a status of **20**.

If the submitted object has a status of **20**, the status is changed to **10** for the object and for any data related with a **Specification** or **BOMView** relation.

- **Change Status to 20 - Reviewed** 

Checks whether the object submitted does not have a status of **20**, **30**, **60**, or **90**.

- o If no status exists, a status of **20** is applied to the object submitted and any data related with a **Specification** or **BOMView** relation.
- o If the object has a status of **10**, the status is changed to **20**.

- **Change Status to 60 - Production Released**

Checks whether the object submitted has a status of **20**.

If the submitted object has a status of **20**, the status is changed to **60** for the object and for any data related with a **Specification** or **BOMView** relation.

- **Un-release Status 60**

The initiator and all managers of the target group are participants.

The **Un-release status 60** process removes the status **60** from the target object.

- o If any manager from the target manager group approves the review, the workflow removes status **60** from the target object.
- o If the review is not approved by any manager, the request to *un-release* the object is denied and the workflow is aborted.

- **Change Status to 0 (snapshot)** 

Only the initiator is a participant.

This workflow lets the user take a snapshot of an item revision's design before making any further modifications. Once completed, the workflow applies a status **0** to the target object.

- **Engineering Order**

The initiator and at least one manager and one checker are participants.

This workflow supports the initiation of an engineering order (EO).

The **Engineering\_Order** process first step, **Create Request**, is assigned to the user that started the workflow, also called the workflow initiator. The workflow initiator must complete the **Change Request** form that is attached to the EO and add any reference data to the EO.

The workflow then checks whether the submitted object has **Obsolete** status.

- o If the object does not have **Obsolete** status the engineering order is denied.
- o If the object has **Obsolete** status the object advances to a manager-approval task.

The workflow initiator must next assign a manager to perform the review, and then the manager performs the review in the **Manager Approval** task.

- o If the manager rejects the review task, the engineering order gets the **Obsolete** status.
- o If the manager approves the review task, the workflow initiator assigns a user to add any new, revised and obsolete parts into the pseudo folders for the EO in the **Create Engineering Order** task.

When the work for the EO is complete and signed off, the workflow initiator assigns a checker to perform the next review in the **In Approval** task.

- o If the checker rejects the review, the EO goes back to the user that performed the work on the **Create Engineering Order** task to review why it was rejected, make the corrections, and then perform the sign off.
- o If the checker approves the review, the EO, parts in the **Revised** and **New Parts** folders, and parts related with a **Specification** or **BOMView** relation are given a status of **60**. Parts added in the **Obsolete Parts** folder are given a status of **90**

After the checker approves the EO, neutral formats are created for the datasets that are attached to the EO, the neutral formats are attached to the EO revision, and the EO completes the workflow.

- **Status Change**


The initiator and at least one checker are participants.

The workflow initiator must assign a checker to perform a review.

- o If the Checker approves the review, a status of **60** is applied to the submitted object and any data related with **Attaches**, **Specification**, or **BOMView** relations.
- o If the Checker rejects the review, the **Status Change** process resides in the workflow initiator's **Tasks To Track** folder in **My Worklist**, and must be deleted by the workflow initiator.

**Note**

To delete a workflow process from your **Tasks To Track** folder:

1. Right-click the workflow task.
2. Choose **Send To**→**Workflow Viewer**.
3. In **Workflow Viewer**, select the workflow process and click **Delete**  in the toolbar.

**Note**

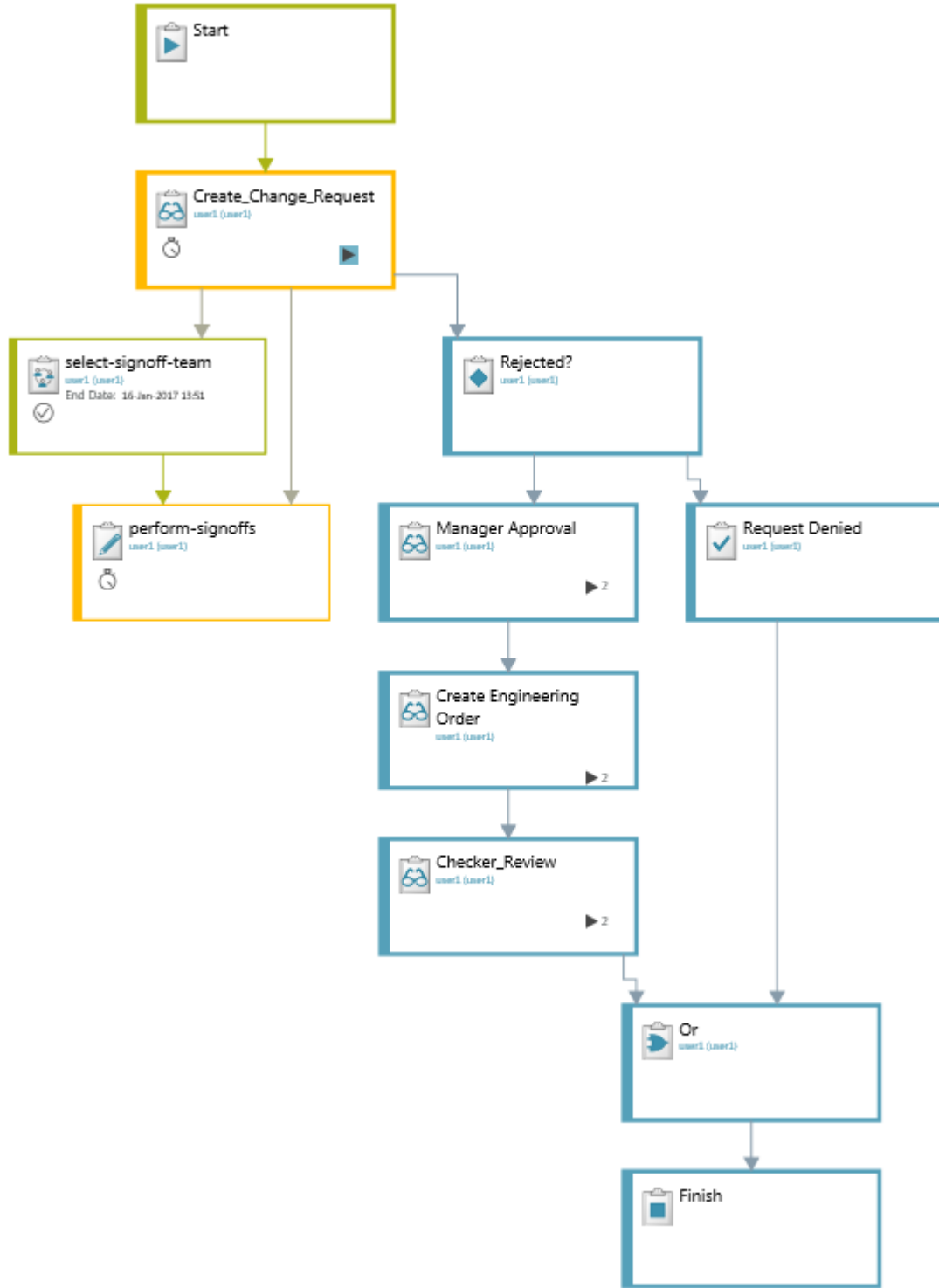
Teamcenter also provides other workflow process templates.



## **Chapter 2: Workflow templates in Teamcenter Rapid Start SaaS**

## Engineering Order

The Engineering Order workflow approves a change to an item or BOM and releases the parts with a status of **60**

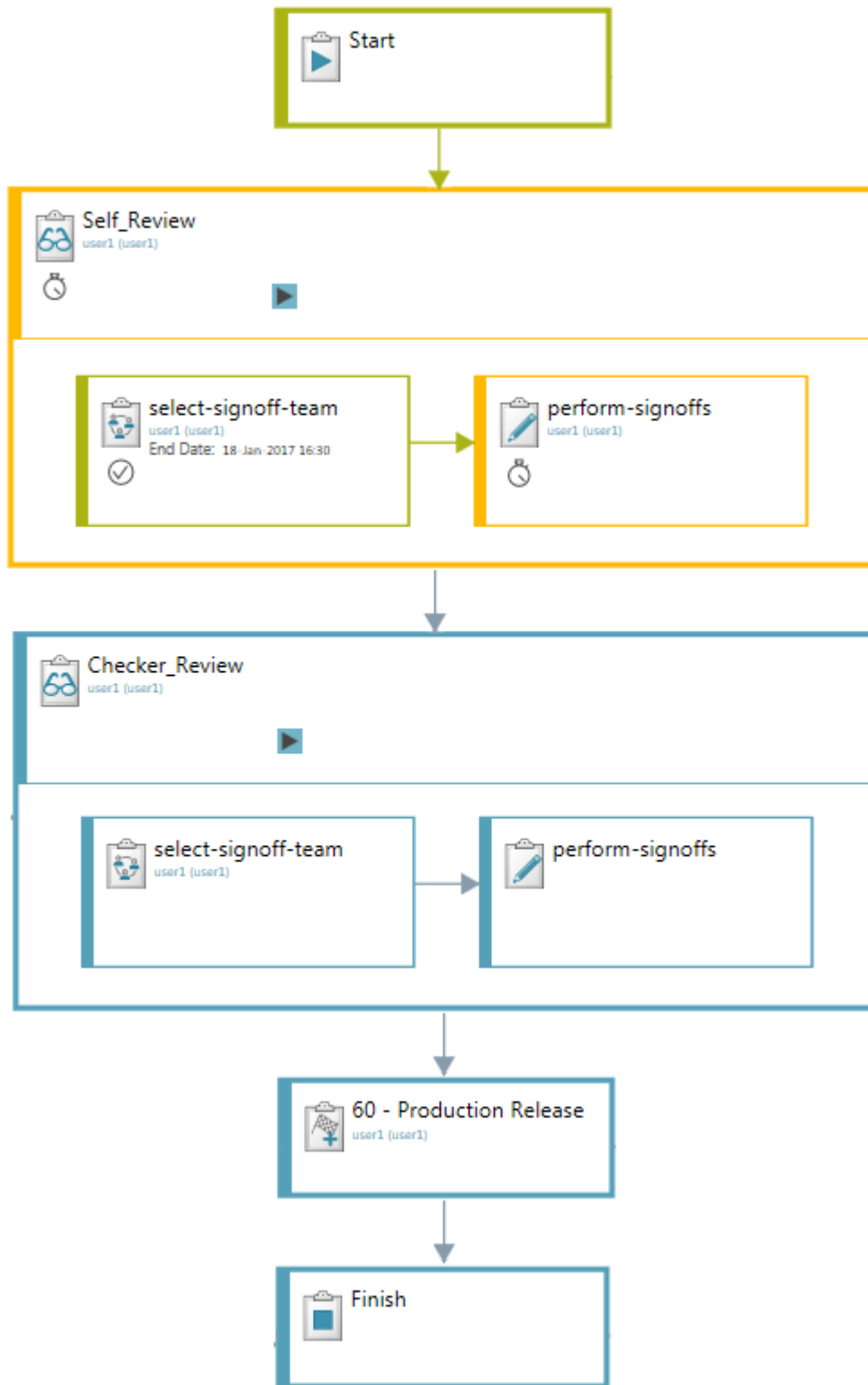


(Released).

Task	Task type	Task description
<b>Create_Request</b>	<b>Review task</b>	Select a signoff team. Perform signoff tasks (to be completed by the members of the selected signoff team). Complete the change request form and add the reference data.
<b>Rejected?</b>	<b>Condition task</b>	Select <b>False</b> if you approve the change request and continue the workflow. Alternatively, if you do not want to approve the change request, select <b>True</b> . This stops the workflow and moves it to the <b>Request Denied</b> task.
<b>Request Denied</b>	<b>Acknowledge task</b>	If you select <b>False</b> in the <b>Rejected</b> task, it aborts the workflow processes.
<b>Manager Approved</b>	<b>Review task</b>	If you select <b>True</b> in the <b>Rejected</b> task, it moves to <b>Manager Approval</b> .  Approve the review task to complete the <b>Manager Approval</b> .
<b>Create Engineering Order</b>	<b>Review task</b>	Approve the review task to complete the Engineering Order. Add new, revised, or obsolete parts.
<b>In_approval</b>	<b>Review task</b>	Select the signoff team to release the engineering order. Perform signoff tasks (to be completed by the members of the selected signoff team).
<b>Finish</b>	<b>Finish task</b>	Complete the workflow.

## 60 - Production Release

The **60 - Production Release** workflow releases an item or BOM with a status of **60 (Released)**.

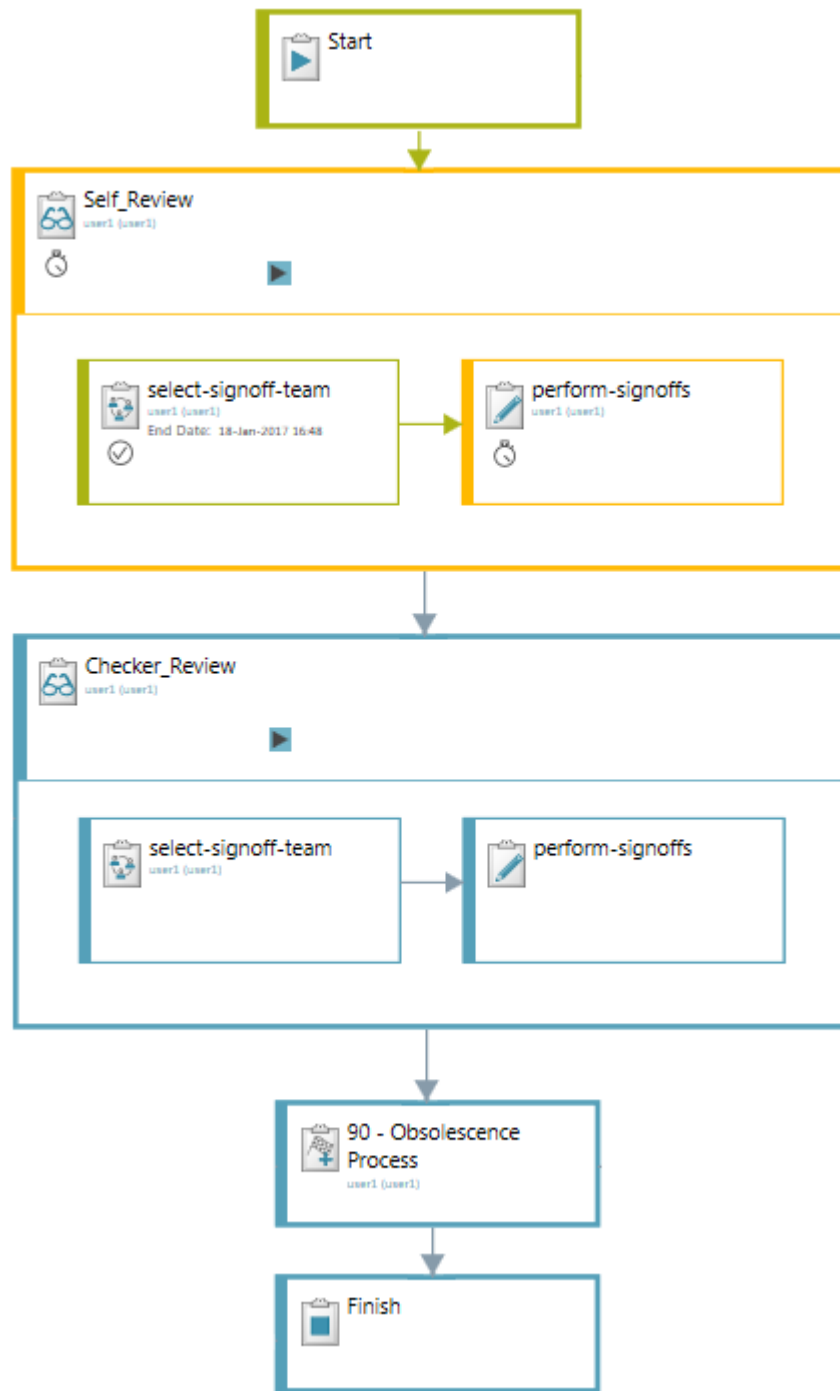


Task	Task type	Task description.
Start	Start task	Start the workflow.

Task	Task type	Task description.
<b>in_self_check</b>	<b>Review task</b>	Approve the review task to continue the workflow process.
<b>in_approval</b>	<b>Review task</b>	Select the signoff team for <b>Production Release</b> . Perform signoff tasks (to be completed by the members of the selected signoff team).
<b>Status</b>	<b>Add Status task</b>	When the <b>in_approval</b> task is complete, the status of target objects is set to 60 ( <b>Released</b> ).
<b>Finish</b>	<b>Finish task</b>	Complete the workflow.

## 90 - Obsolescence Process

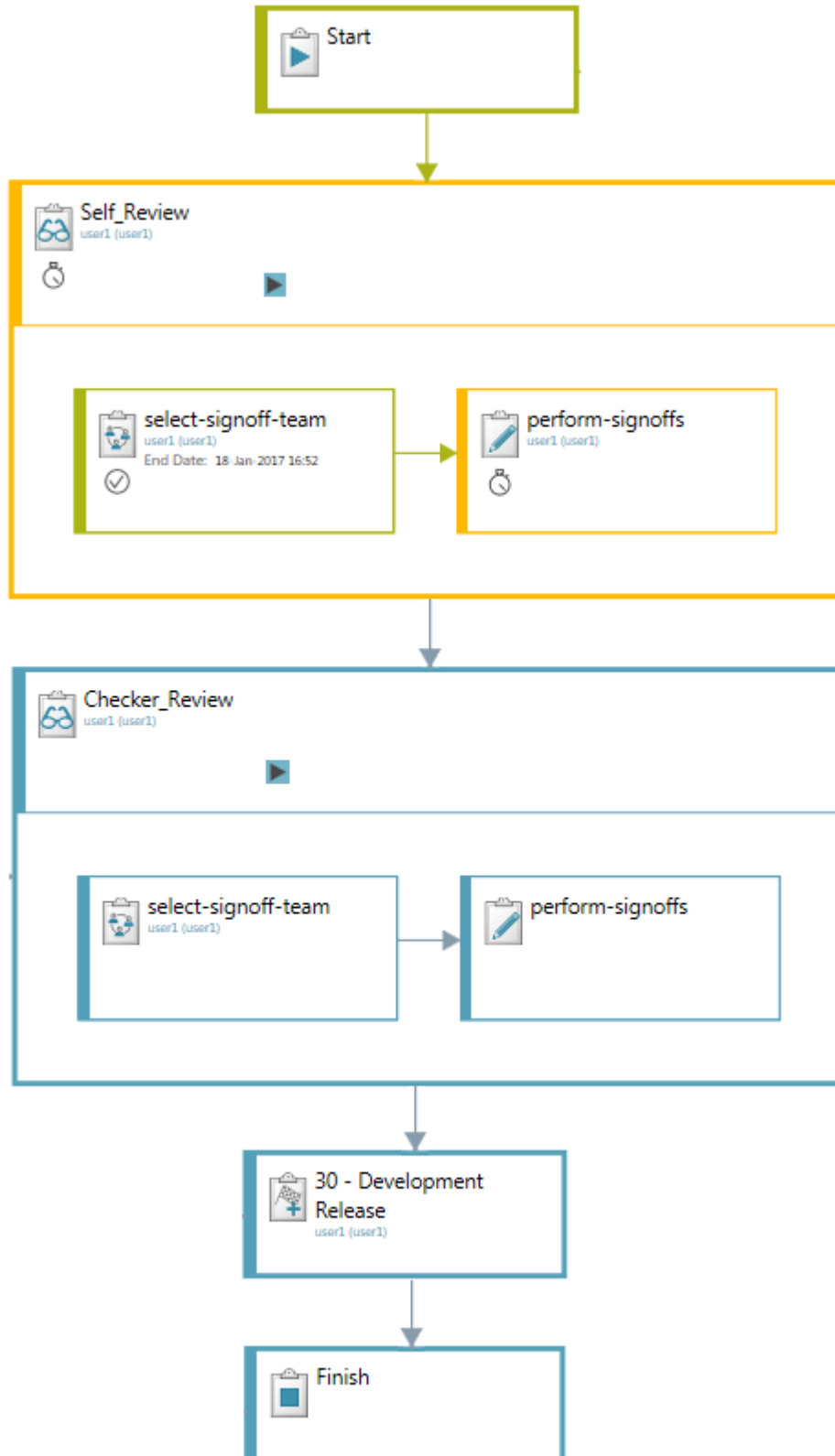
The **90 - Obsolescence Process** workflow marks an item or BOM as obsolete.



Task	Task type	Task description
Start	Start task	Start the workflow.
in_Self_Check	Review task	Approve the review task to continue the workflow process.
in_Approval	Review task	Select the signoff team for <b>Obsolescence Release</b> . Perform signoff tasks (to be completed by the members of the selected signoff team).

<b>Task</b>	<b>Task type</b>	<b>Task description</b>
<b>Status</b>	<b>Add Status task</b>	When the <b>in_Approval</b> task is complete, the status of target objects is set to 90 ( <b>Obsolete</b> ).
<b>Finish</b>	<b>Finish task</b>	Complete the workflow.

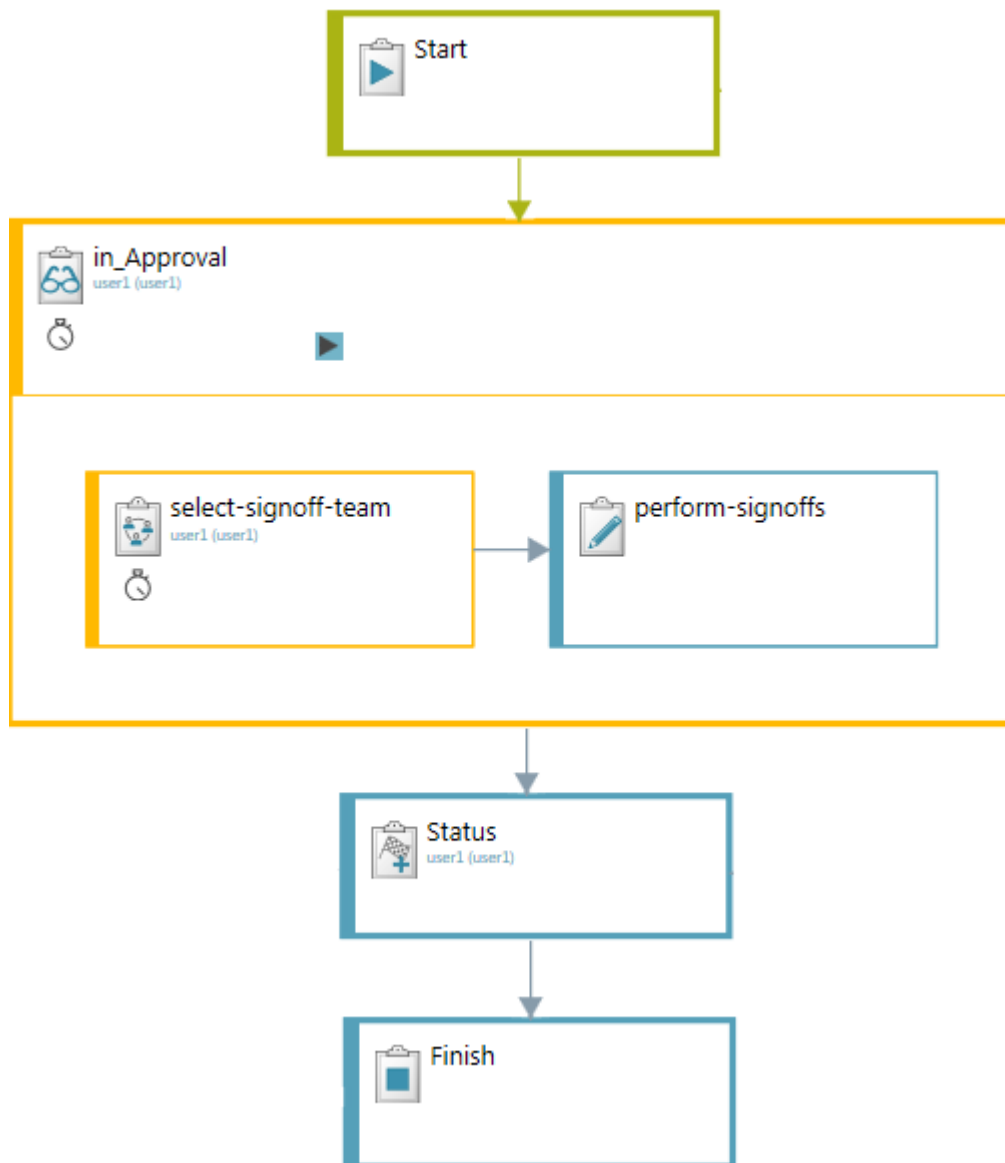
## 30 - Development Release





Task	Task type	Task description
<b>Start</b>	<b>Start task</b>	Start the workflow.
<b>in_Self_Check</b>	<b>Review task</b>	Approve the review task to continue the workflow process.
<b>in_Approval</b>	<b>Review task</b>	Select the signoff team for <b>Obsolescence Release</b> . Perform signoff tasks (to be completed by the members of the selected signoff team).
<b>Status</b>	<b>Add Status task</b>	When the <b>in_approval</b> task is complete, the status of target objects is set to 30.
<b>Finish</b>	<b>Finish task</b>	Complete the workflow.

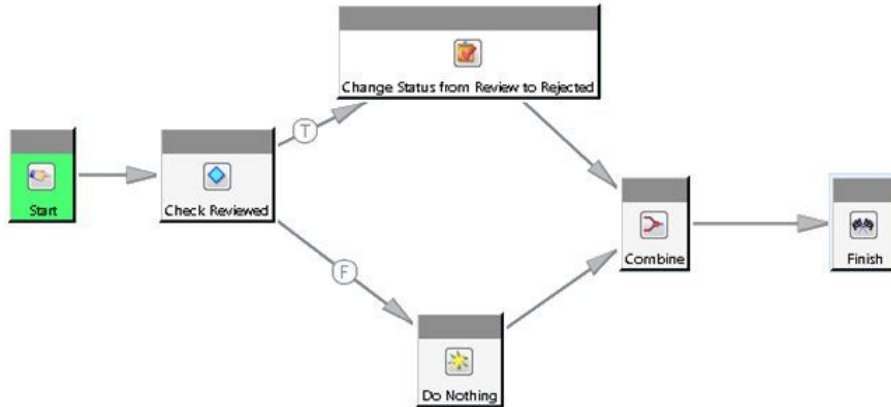
## Status Change



Task	Task type	Task description
Start	Start task	Start the workflow.
in_Approval	Review task	Select the signoff team for <b>Status Change</b> . Perform signoff tasks (to be completed by the members of the selected signoff team).
Status	Add Status task	When the <b>in_approval</b> task is complete, the status of target objects is set to <b>60 (Released)</b> .
Finish	Finish task	Complete the workflow.

## Change Status to 10 - Rejected

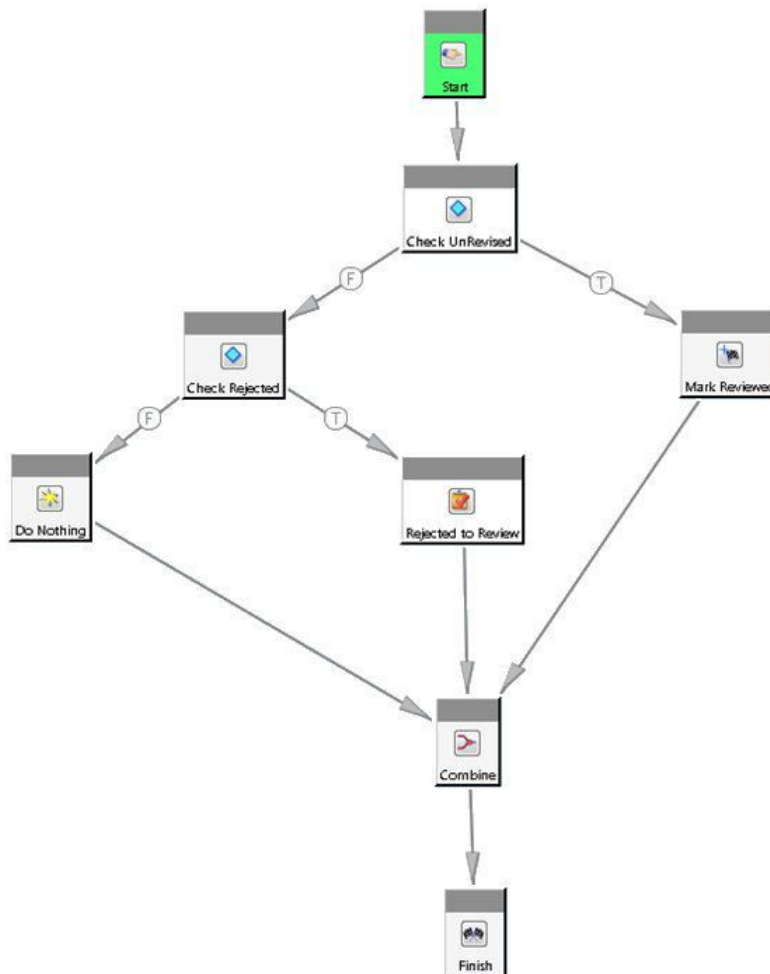
The **Change Status to 10 - Rejected** workflow marks an item or BOM as **10 (Rejected)**.



Task	Task type	Task description
Start	Start task	Start the workflow.
Check Reviewed	Condition task	Automatically check to see if the status of the target object is <b>20 (Review)</b> .
Change Status from Review to Rejected	Task	If the status of the target object is <b>20 (Review)</b> , set the status to <b>10 (Rejected)</b> .
Do Nothing	Do task	If the status of the target object is not <b>20 (Review)</b> , do nothing.
Finish	Finish task	Complete the workflow.

## Change Status to 20 - Reviewed

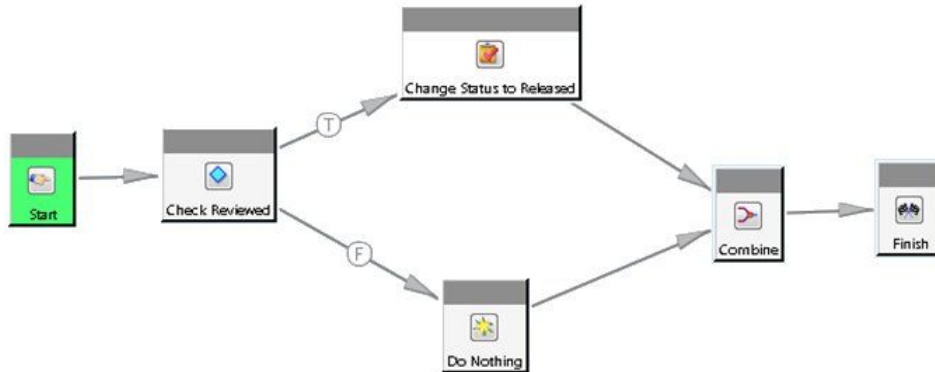
The **Change Status to 20 - Reviewed** workflow marks an item or BOM as **20 (Review)**.



Task	Task type	Task description
Start	Start task	Start the workflow.
Check UnRevised	Condition task	Automatically check the status of the target object.
Mark Reviewed	Add Status task	If the revision has no status attached, the status of the target object is set to <b>20 (Review)</b> .
Check Rejected	Condition task	Automatically check to see if the status of the target object is <b>10 (Rejected)</b> .
Rejected to Review	Task	If the status of the target object is <b>10 (Rejected)</b> , change the status to <b>10 (Rejected)</b> .
Do Nothing	Do task	If the status of the target object is not <b>10 (Rejected)</b> , do nothing.
Finish	Finish task	Complete the workflow.

## Change Status to 60 - Production Released

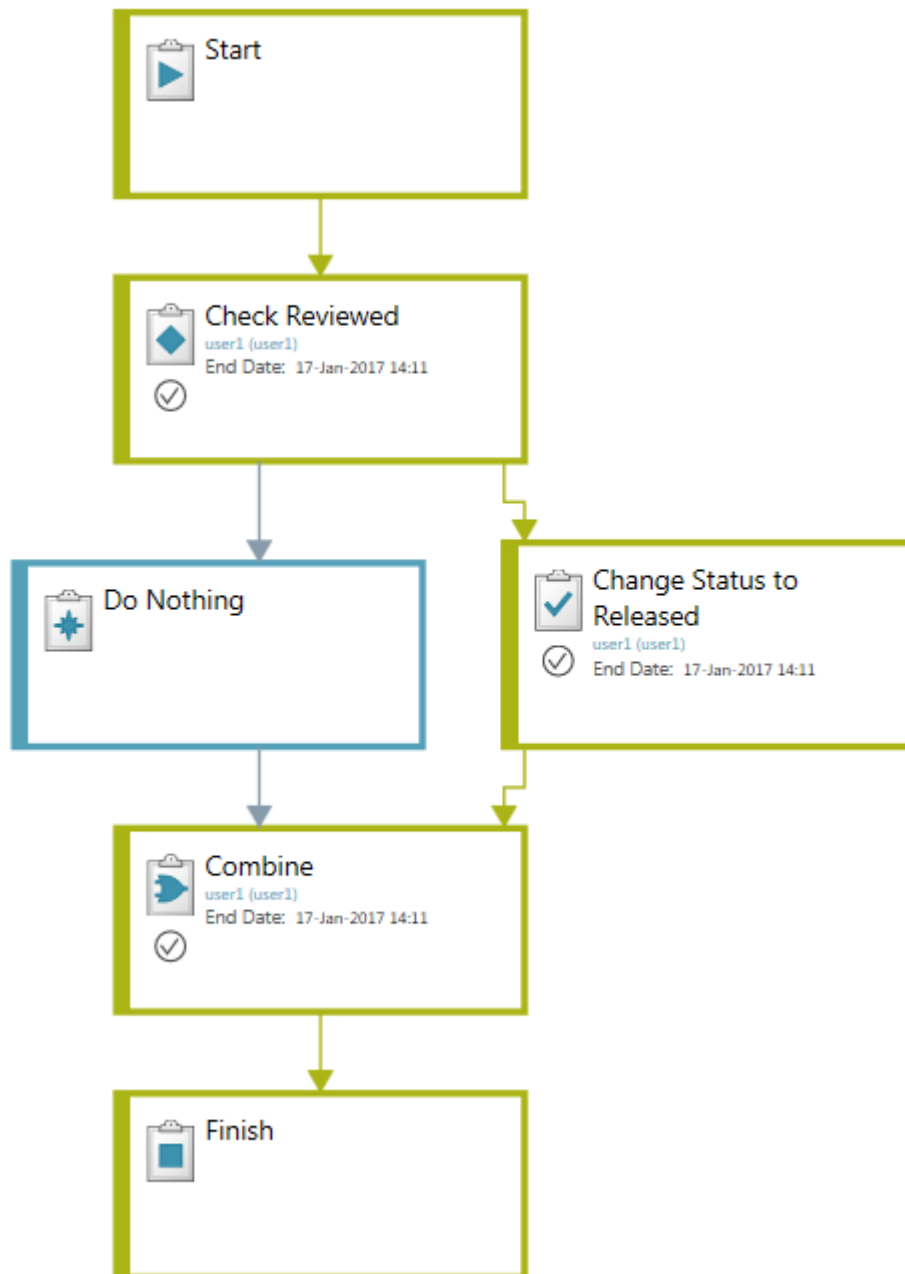
The **Change Status to 60 - Production Released** workflow releases an item or BOM with a status of **60 (Released)**.



Task	Task type	Task description
Start	Start task	Start the workflow.
Check Reviewed	Condition task	Automatically check to see if the status of the target object is <b>20 (Review)</b> .
Change Status to Released	Task	If the status of the target object is <b>20 (Review)</b> , change the status to <b>60 (Released)</b> .
Do Nothing	Do task	If the status of the target object is not <b>20 (Review)</b> , do nothing.
Finish	Finish task	Complete the workflow.

## Change Status to 60 - Production Released

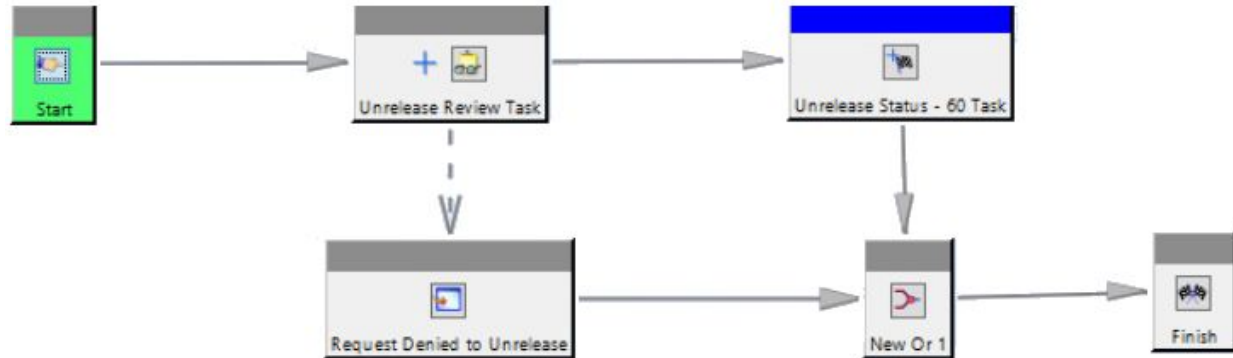
The **Change Status to 60 - Production Released** workflow releases an item or BOM with a status of **60 (Released)**.



Task	Task type	Task description
Start	Start task	Start the workflow.
Check Reviewed	Condition task	Automatically check to see if the status of the target object is <b>20 (Review)</b> .
Change Status to Released	Task	If the status of the target object is <b>20 (Review)</b> , change the status to <b>60 (Released)</b> .
Do Nothing	Do task	If the status of the target object is not <b>20 (Review)</b> , do nothing.
Finish	Finish task	Complete the workflow.

## Un-release status 60

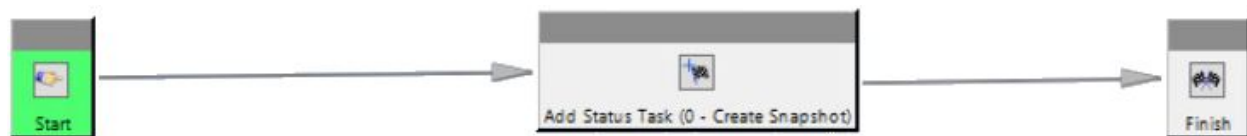
When initiated, the **Un-release status 60** workflow removes the status of **60** from an item revision or BOM.



Task	Task type	Task description
Start	Start task	Starts the workflow.
Unrelease Status-60	Review Task	Automatically assigns the <b>performsignofftask</b> to all the managers of the target group.
Unrelease Status-60 Task	Add Status Task	Removes the status of <b>60</b> from the target object if a manager from the target group has approved the request.
Request Denied to Unrelease	Acknowledgement Task	Aborts the workflow if the request is rejected by a manager.
Finish	Finish Task	Completes the workflow.

## Change status to 0 (snapshot)

The **0-user-snapshot** workflow lets you save a snapshot of an item revision before modifying it.



Task	Task type	Task description
Start	Start Task	Start the workflow
Add Status	Add Status Task	The status of the target object is set to <b>0 (Snapshot)</b>
Finish	Finish Task	Complete the workflow



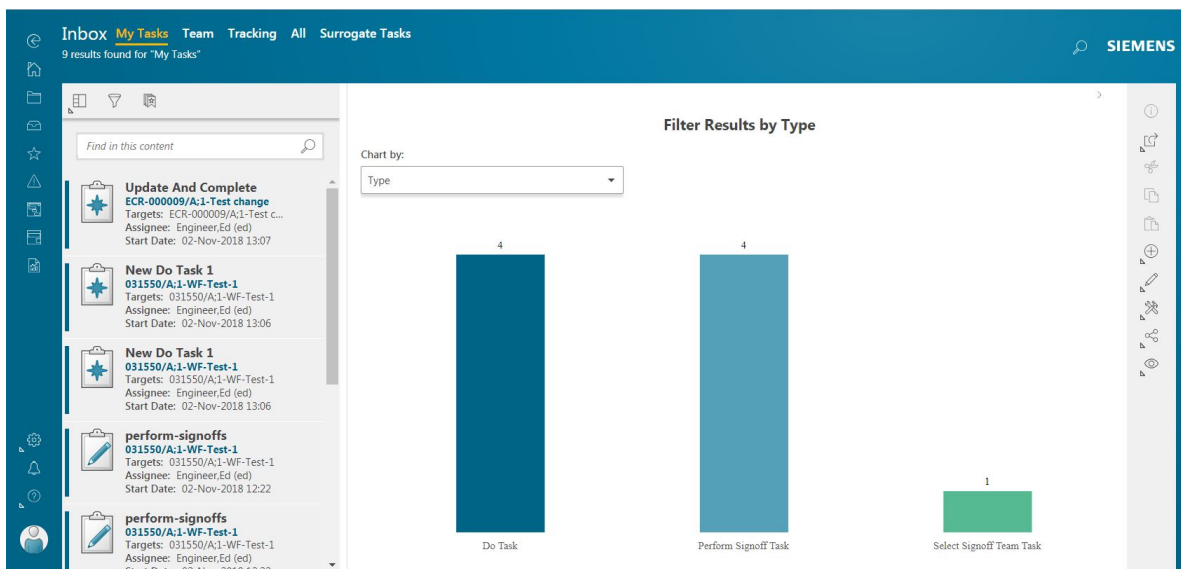


## Chapter 3: What are workflows and tasks?

A workflow is a series of required tasks, such as approvals (signoffs) and reviews, similar to the one shown, performed on an object, such as a document or change. The object is the *target* of the workflow.



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

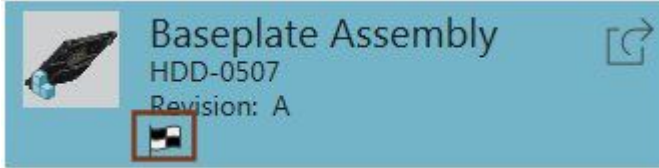


The following are examples of three different types of tasks:

Task	Description
<b>Select a signoff team</b>	<p>A task to <b>select the team</b> to review the target of the workflow and indicate approval. They receive a task to perform the signoff as soon as the signoff team is selected.</p> <p>The select a signoff team task is often the first task in a workflow; the user who initiated the workflow performs this task.</p>
<b>Do task</b>	<p>A task that <b>provides instructions for you to follow</b>, for example, a task to validate a change.</p>
<b>Sign off task</b>	<p>A task to <b>review and approve an object</b>, such as a document or change.</p> <p>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.</p>


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 one of the default Teamcenter release statuses, such as **Released**, **Locked**, **Rejected**, or **Obsolete**, 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.

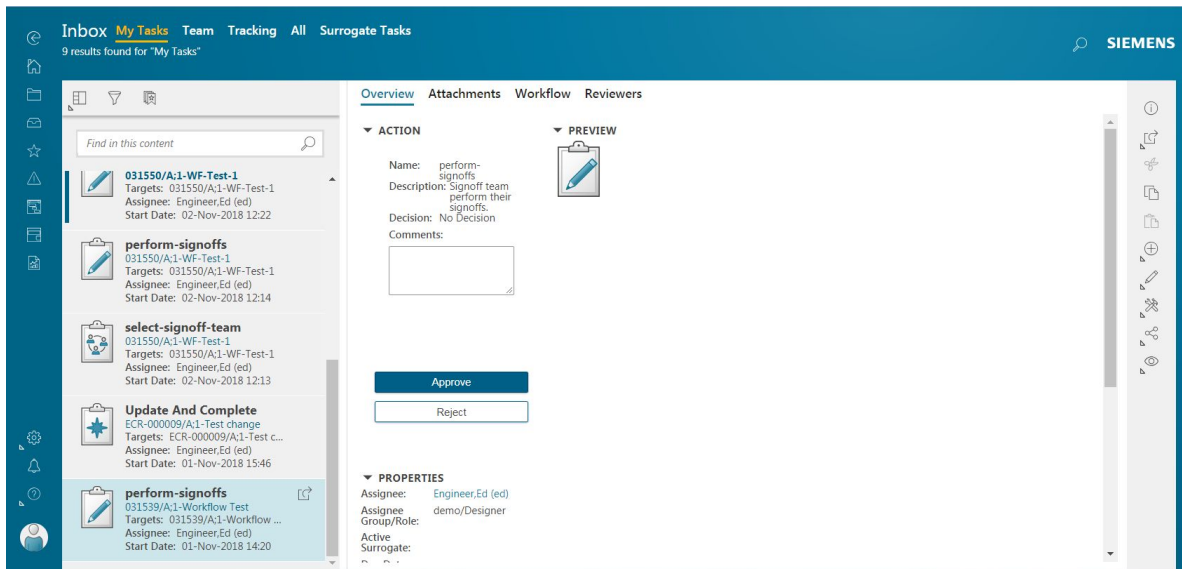
The release status indicator icon cannot be customized by your system administrator. The indicator shown below is common for all release statuses:



# Chapter 4: Working with inbox tasks

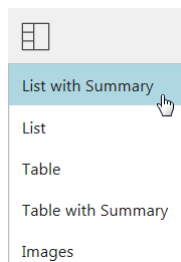
## Inbox

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:



### Inbox header tabs

**My Tasks**  
**Team**  
**Tracking**

**All**

**Surrogate Tasks**

Displays all tasks assigned to you.

Displays all tasks assigned to Resource Pools you belong to.

Displays tasks with which you are associated, such as tasks that you have signed off but are waiting for others to sign off to complete.

Displays all tasks assigned to both you and any resource pools you belong to.

Displays tasks assigned to users that have assigned you as their surrogate.

**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 displays.

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

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

#### Action

Name: `perform-signoffs`

Description: Complete analysis

Comments:

Approve

Investigate

Rework

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

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

## Sign off on 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

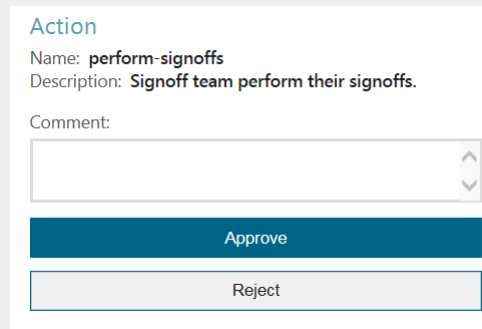
You can add comments without signing off on the task. For example, you add notes or details about the review.

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.



**Action**  
 Name: **perform-signoffs**  
 Description: **Signoff team perform their signoffs.**


Comment:

**Approve**

**Reject**

- 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, like 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.

- 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.

- 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 approval.

- Reject**

Sign off the task without approval. Your decision does not count towards the quorum approval count required to complete the task. If the quorum requires all signoffs to approve, your rejection stops the workflow process.

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

## 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

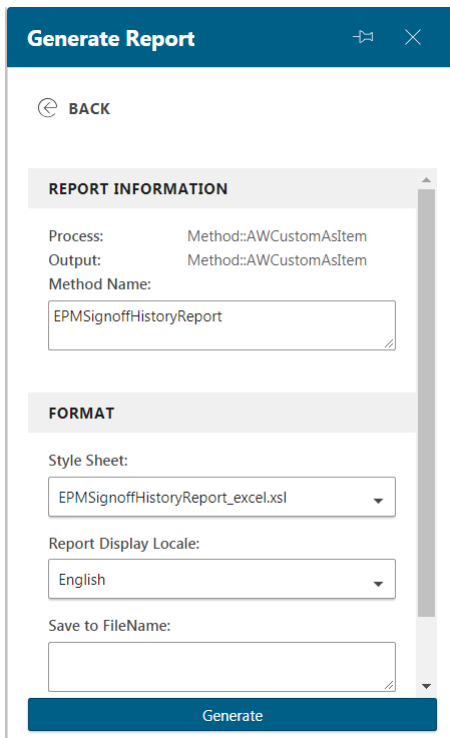
The **Signoff History** report is not available for **Perform-Signoff** tasks.

1. You can generate the **Signoff History** report by selecting or opening a task and click **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 is dependent on the complexity and detail of the object. The report structure is nonconfigurable.





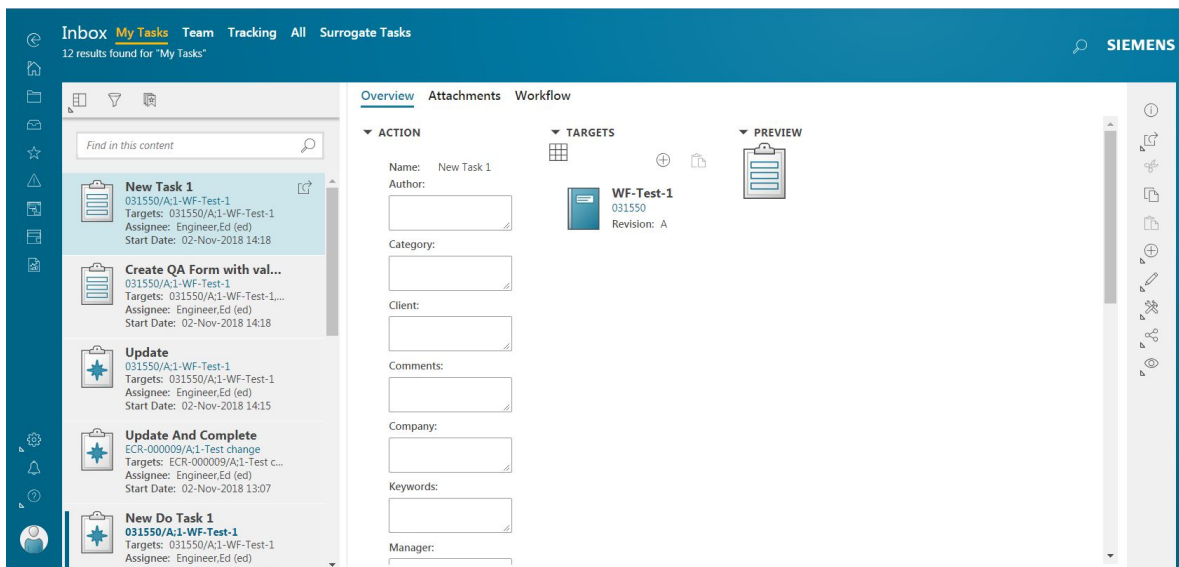
- Review any task instructions and process description. If necessary, type additional information into the box.
- Complete the task instructions.
- Click **Complete**.

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.

## 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.

- Click the **INBOX** tile on the home page.
- 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 Viewer and display any signoff information. The Workflow Viewer also displays information on preceding and upcoming tasks.
- Use the **Attachments** tab to display the objects, references, and forms attached to the task.

3. Click the embedded task action in the **Overview** tab. Alternatively, in the **Workflow** tab click **Manage**  > **Complete Task** on the primary toolbar.
4. Enter the requested information into the form fields. You must fill all required fields to complete the task.

**Complete Task**
×

Name: Create and Display QA Form

Description: display the QA form

ACharacter:

ADate:    

ADouble:

AInteger:

ALogical:

AString:

AStringArray:


ASugLOV:

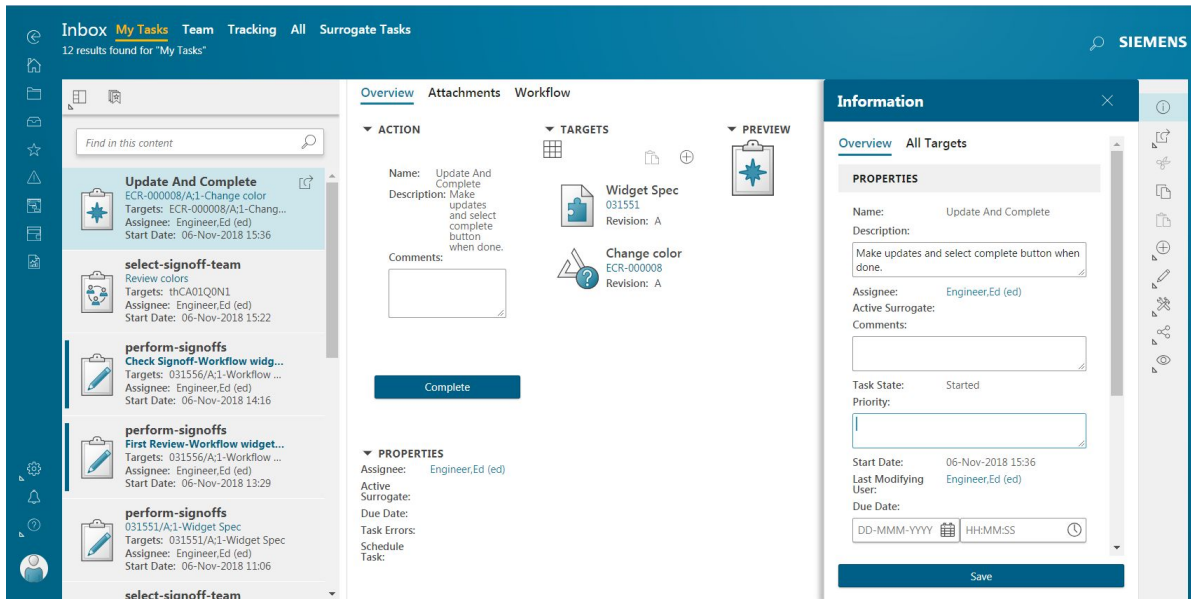
Complete

5. Click **Complete** to finish the task and remove it from your **My Tasks** list.

## 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.

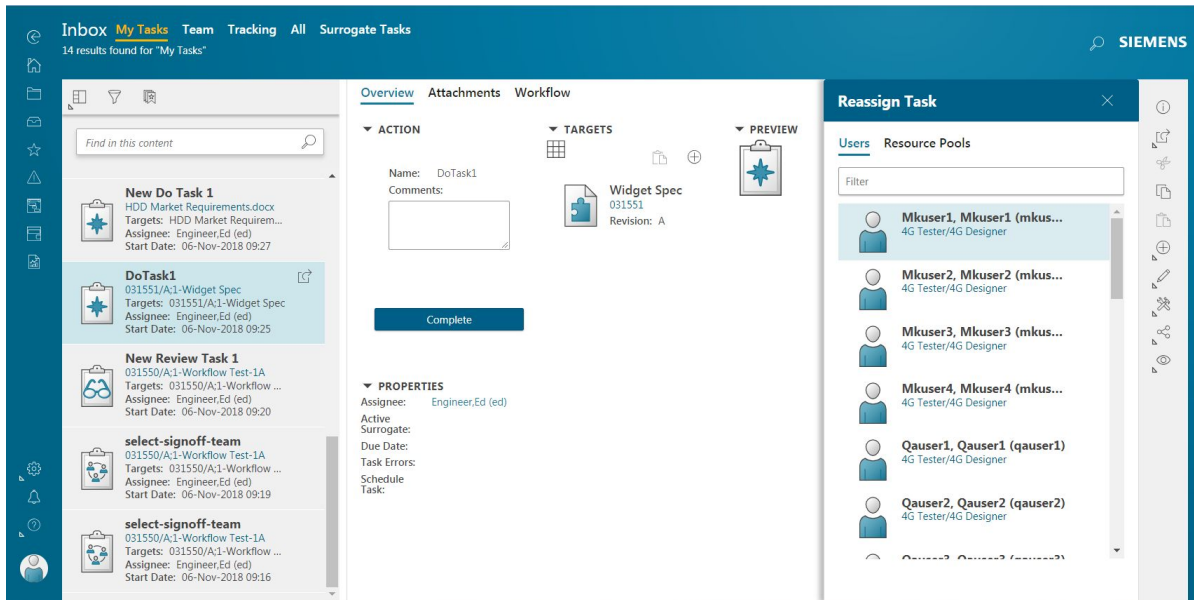
## Reassign a task to another user

If you are the responsible party, or a privileged user, you can reassign any task that has not 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

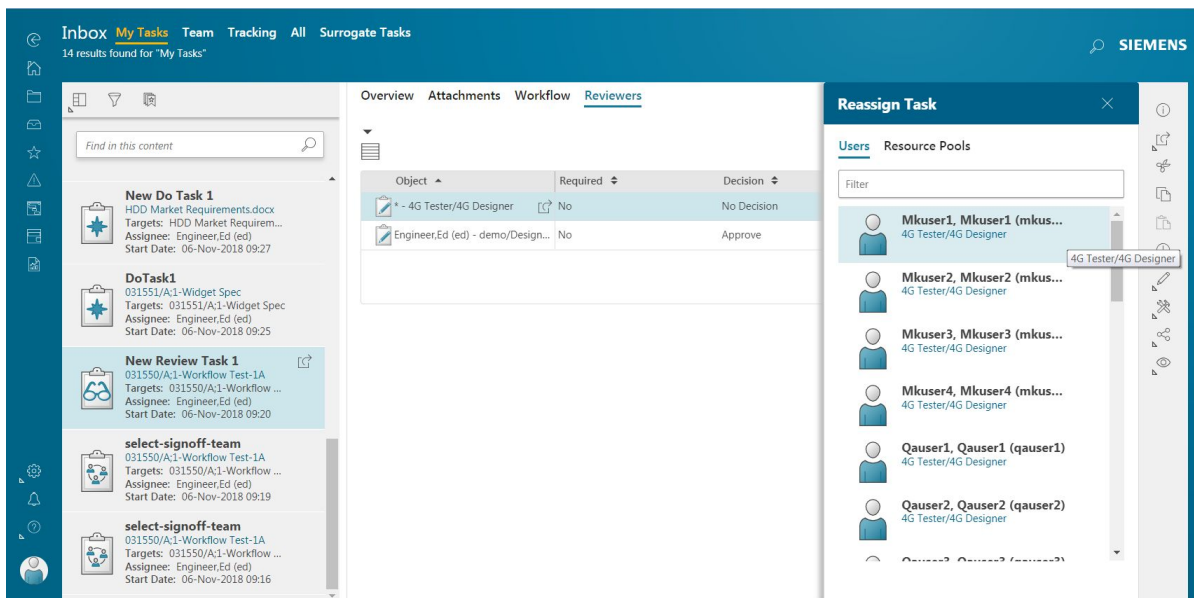
1. Click the **INBOX** tile on the home page.
2. Click the **My Tasks** tab, if not displayed.
3. Click **Manage**  > **Reassign Task** on the primary toolbar.



4. 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 the **Reviewers** tab and select the task that you want to reassign. You have the option of **reassigning multiple tasks**.
4. Click **Manage**  > **Reassign Task** 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:
    - o Search for the user or select the user's name anywhere in Active Workspace (for example, from a participant or owner list).
    - o 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 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 opening the task and 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.

## 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.

My Surrogates

USER	START DATE	END DATE	EMAIL	PHONE
User1, ACL (aclu...)	22-Apr-2016 10:42	29-Apr-2016 23:30		
Specialist, Julie (j...)	22-Apr-2016 10:43	29-Apr-2016 23:30		

Surrogate For:

USER	START DATE	END DATE	EMAIL	PHONE
Analyst, Carol (ca...)	22-Apr-2016 10:43	29-Apr-2016 23:30		
User1, ACLB (aclu...)	22-Apr-2016 10:42	29-Apr-2016 23:30		

Any user can be designated as a surrogate, but only a user who belongs to the group and role specified by the task profile can perform the task.

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.

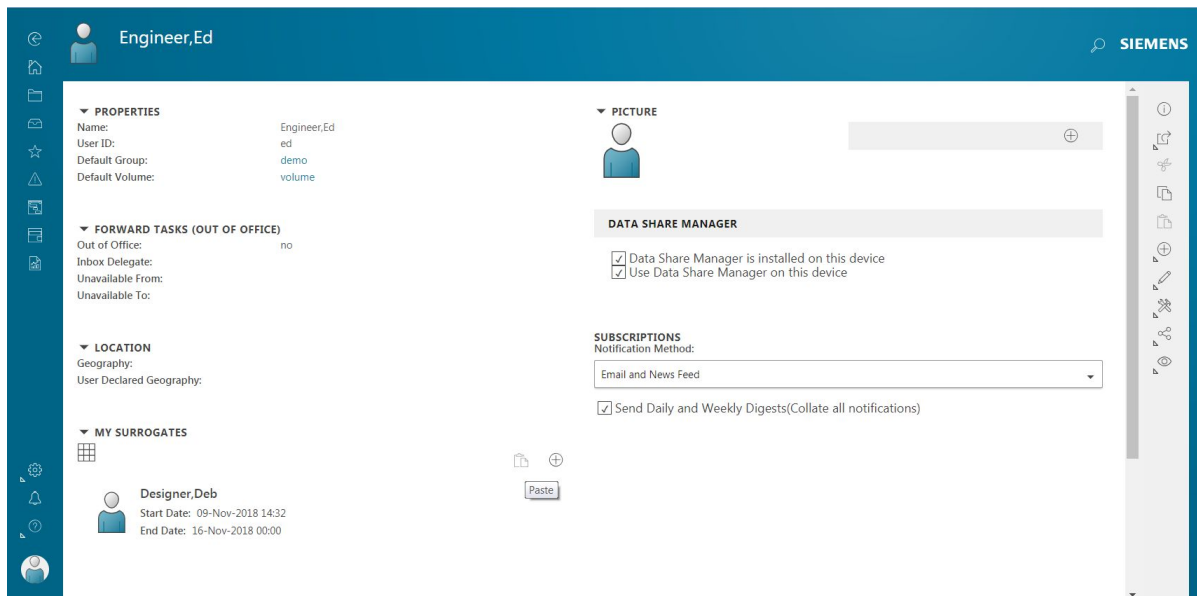
If you do not have privileges, you can only define surrogates for your own tasks.


## 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**.

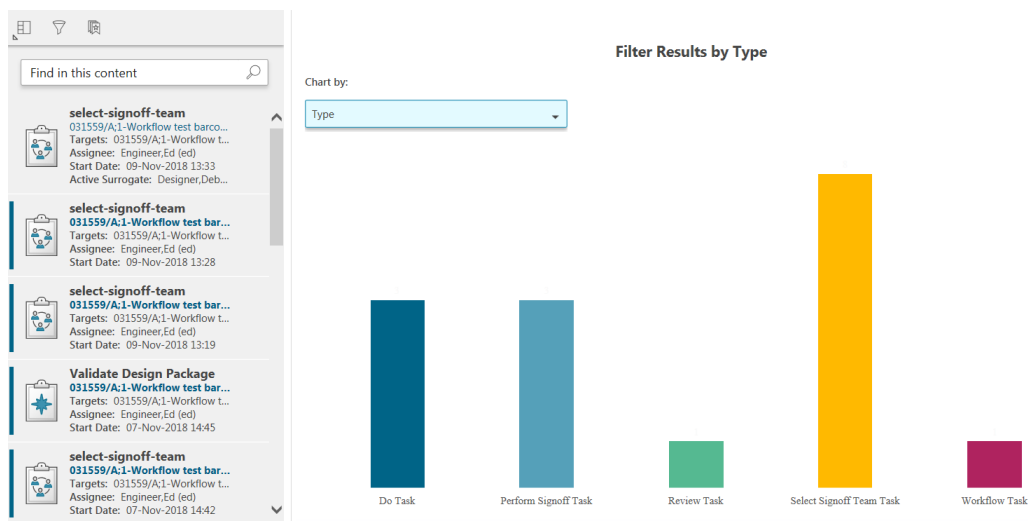
- Click **Add** to add the surrogate.


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

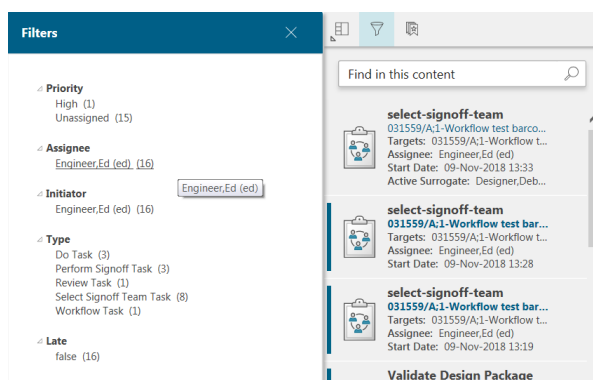
## Select to stand-in for a task for which you are the surrogate


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.



- Click the **INBOX** tile on the home page.
- Click the **Surrogate Tasks** tab.
- (Optional) Use **Filter**  to refine the list of tasks to a particular assignee, initiator, or type of task.



- Select a task to perform.
- 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.

## 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.

### ▼ FORWARD TASKS (OUT OF OFFICE)

Out of Office:	yes
Inbox Delegate:	Designer, Deb (deb)
Unavailable From:	10-Nov-2018 16:14
Unavailable To:	11-Nov-2018 00:00

**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 the automatic forwarding of tasks

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

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

### Forward Tasks (Out of Office)

Out of Office: **no**


Inbox Delegate: **Engineer,Ed (ed)**

Start Date: **08-Sep-2015 14:41**

End Date: **14-Sep-2015 14:41**

**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**.

## 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**.

**Abort Task** ✕

Name: perform-signoffs

Comments:

Reviewer unable to perform signoff at this time

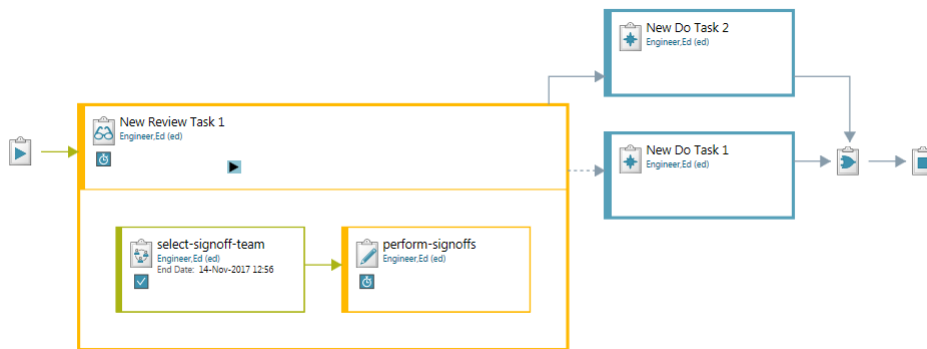
Abort



## Chapter 5: Submitting part data and documents to workflows

### Start a 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 steps below.




Your administrator can configure which workspace objects are available for **Submit to Workflow**. Setting the business object Boolean constant to **true** enables objects to be submitted. Refer to Configure Workflow Designer using the Business Modeler IDE.

Your administrator can assign default workflows for various content types, such as change requests or problem reports. Newly created content with an assigned workflow is automatically submitted to the workflow on creation. Existing content has the default workflow automatically set as **Workflow Template** when submitting it to a workflow.

The tasks initiated by the workflow initiates 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.

1. Select the data you want to submit to the new workflow.
2. Click **Manage**  > **Submit to Workflow** on the primary toolbar.
3. Select a template from the **Workflow Template** list.

Your administrator can configure the list of available templates.

#### Note

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

4. Accept the default workflow name or enter your own.
5. Enter a description for the new workflow.
6. Click **Submit**.

## Assign users to tasks

When you submit objects to workflow, you have the choice of adding users to tasks at the same time. The workflow template determines the types of tasks and users available.

1. After you have chosen an appropriate workflow template, select the **Assignments** tab. A list of tasks displays.
2. Select a task to view a list of assignee and reviewer types. This list is dependent on the selected workflow template.

**Submit to Workflow** [X]

Workflow Assignments

**ASSIGNMENT LIST**

None [v]

**Task Name**

- Check the change type
- Process ECR
- Process PR
- Process ECN

**ASSIGNEE** [ + ]

Add

Submit

- Click **Add** [ + ] next to the assignee type.  
A list of users is displayed.

**Submit to Workflow** [X]

← ADD ASSIGNEE

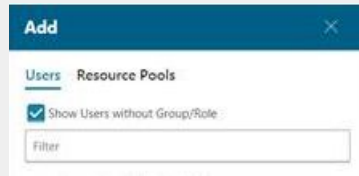
Users Resource Pools

Filter

- Mkuser1, Mkuser1 (mkuser1)**  
4G Tester/4G Designer
- Mkuser2, Mkuser2 (mkuser2)**  
4G Tester/4G Designer
- Mkuser3, Mkuser3 (mkuser3)**  
4G Tester/4G Designer
- Mkuser4, Mkuser4 (mkuser4)**  
4G Tester/4G Designer
- Qauser1, Qauser1 (qauser1)**  
4G Tester/4G Designer
- Qauser2, Qauser2 (qauser2)**  
4G Tester/4G Designer

**Note**

If your administrator has set the **WRKFLW\_user\_panel\_content\_display** preference value to **1**, you will see a unique list of users, rather than all users in all groups and roles. You may have a checkbox to **Show Users without Group/Role**. Selecting this check box displays user names without their group or role.



4. Type a name or title to filter the list of **Users** and select a user. A checkmark appears next to each selected name. Multiple users and/or resource pools may be added this way.
5. Click **Add** to assign the users to the task.
6. After all tasks are assigned, click **Submit** to submit the object to workflow

## View the task workflow

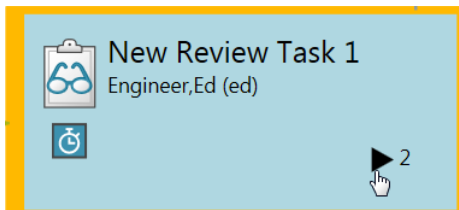
### Overview

The task workflow tab displays required tasks, such as approvals, signoffs, form tasks for item revisions, and changes submitted to a workflow. Signoff information also displays completed tasks and approvals.

**Note**

Click the **Attachments** tab to view target and reference objects for this process.

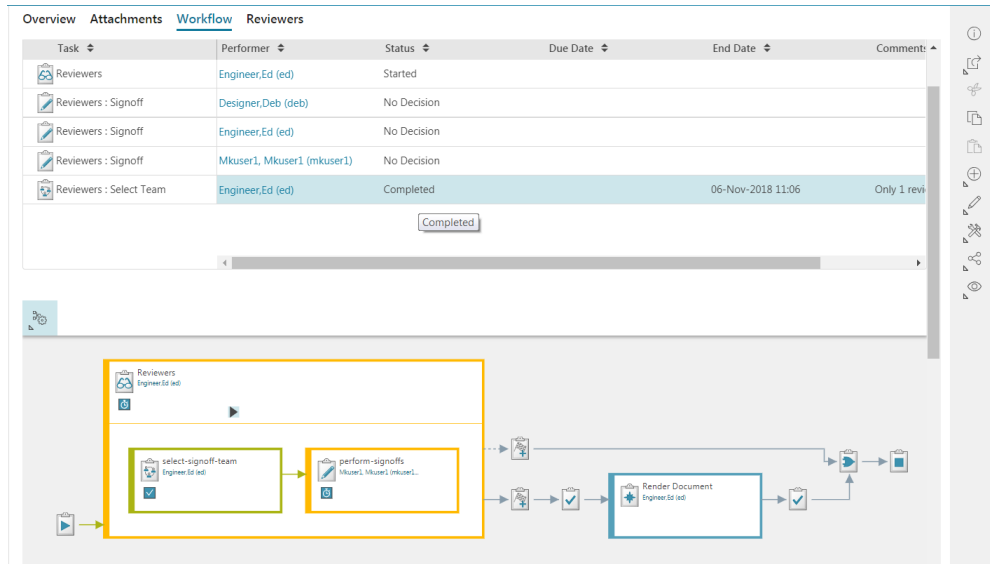
Because some workflows are very large, the initial workflow view focuses on the previous, current, and next tasks. Tasks with multiple action items, such as selecting a signoff team and performing signoffs, are minimized and indicated by an arrow. Click on the arrow to expand the minimized tasks.




Noninteractive tasks do not require user interaction and are shown as an icon. Examples of noninteractive tasks are **Start** and **Finish**.

The workflow task summary displays the most recent task first.





**Tip**  
 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.

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

The colored tiles display the task type, due dates, and the assigned users. The following icons also display the task state:



The task is currently active and not yet complete.  
 The task is processing in the background.

This typically occurs when automation associated with the task takes more than a few seconds to complete.



**Note**


Use the rich client *Workflow Designer* to configure background processing for the task.




The task is complete.



The task failed.



- The task **Overview** tab and signoff tables show information about failed tasks. You can also hover your cursor over the  icon to view error information.
- If the task has been removed from the inbox due to an error, you can search for the workflow target and select it to view the workflow information.

### View the task workflow

1. Select the **INBOX** tile on the home page.
2. Click a tab, such as **My Tasks**, and then select a task to view its details.
3. Click the **Workflow** tab to view the task workflow.
4. If a workflow process contains subprocesses, click **Show Children**  to switch between showing and hiding the subprocesses. The number of subprocesses displays next to the icon when hidden.



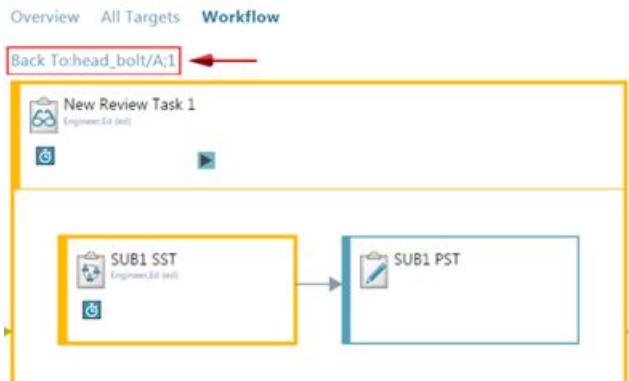
Do the following to view the tasks in the subprocess:

- a. Click **Open**  to open the subprocess workflow.
- b. Select the task assigned to you in the subprocess, and click **Manage**  > **Complete Task** on the primary toolbar.

#### Note

Tasks in subprocesses also appear in your **Inbox** on the **My Tasks** tab.

- c. When you finish the tasks, click the link at the top of the workflow view to return to the main workflow process.



5. Do any of the following:
- Perform the task.
  - Reassign the task to another user.
  - Promote the task.

#### Note

All interactive tasks can be promoted, but only if your administrator has configured that action.

## Select a signoff team

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

You can choose individual users, a group, or resource pool and specify quorum requirements. You can also add members to the signoff team when submitting an object to workflow, or as part of the **select-signoff-team** task.


### Add signoff team members during Submit to Workflow

1. From the **Submit to Workflow** panel, select the **Assignments**.

The screenshot shows a 'Submit to Workflow' dialog box. At the top, there's a title bar with 'Submit to Workflow' and a close button. Below that, it says 'Workflow Assignments'. A task name 'New Review Task 1' is shown with a trash icon. There are two sections: 'ASSIGNEE' and 'REVIEWERS'. The 'REVIEWERS' section has a plus icon and an 'Add' button. A 'Required' label is next to a person icon. At the bottom is a 'Submit' button.

2. Select  $\oplus$  to add users. You can add assignments individually, or from a resource pool.
3. Type a name or title to filter the list and select a user. A checkmark appears next to each selected name. To add multiple users and resource pools, continue to filter and select reviewers.
4. To remove the user, select the name again to remove the checkmark.
5. Click **Add** 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.

**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.

TASK	PERFORMER	STATUS	END DATE	COMMENTS
New Review Task...	Engineer.Ed (ed)	Completed	21-Apr-2016 11:14	
New Review Task...	Engineer.Ed (ed)	No Decision		

You can select a future **Select Signoff Team** task and make the assignments.

- You can add the signoff team by clicking **Add**  in the **Overview** tab.  
Or, by clicking **Manage**  > **Complete Task** on the primary toolbar in the **Workflow** tab.
- Type a name or title to filter the list of **Users** or **Resource Pools**. A checkmark appears next to each selected name. 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. In the rich client, assigning a user can be optional or required depending on the workflow template.

- Click **Add** to create the reviewer's list.
- 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**.
- (Optional) Specify the completion criteria by entering the **Minimum Participation** information.

Overview Attachments Workflow

ADDITIONAL REVIEWERS +

 **Manufacturer, Manny (manny)**  
Engineering/Designer  
Decision Needed: No

 **Engineer, Ed (ed)**  
4G Tester/4GBOM Analyst  
Decision Needed: No 4G Tester/4GBOM

MINIMUM PARTICIPATION

Percent  Numeric

Require full participation

Comments:

Complete

- **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**.

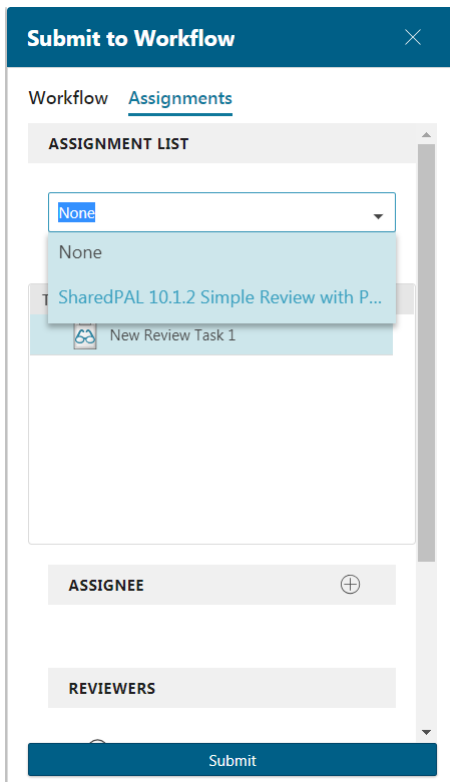
## Apply assignment lists

Assignment lists, or Process Assignment Lists (PALs), are configured in My Teamcenter to individual workflow templates. Using assignment lists helps automate assigning tasks to users.

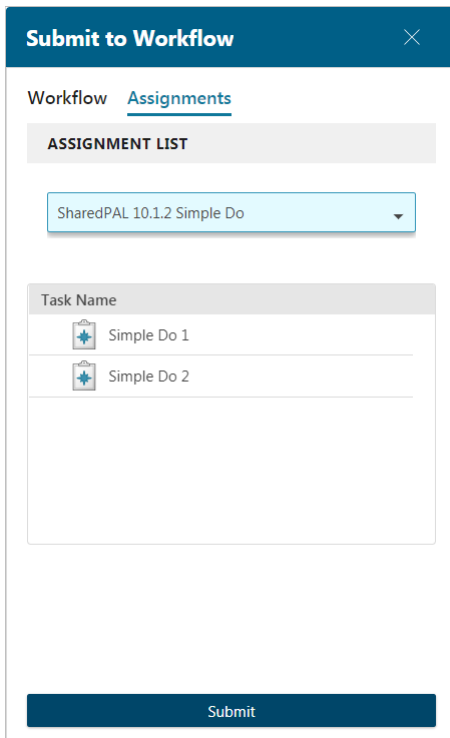
An example of a process assignment list would be a group of reviewers that handle specific signoffs. When the assignment list is applied, the workflow automatically populates their assignments in the workflow, and assigns the tasks to their inboxes.

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

1. Select the **Assignments** tab.
2. Click the dropdown list to view the available PALs. Select the appropriate PAL.



The manual assignment options for **Assignee**, **Reviewers**, and others are no longer available.



3. Click **Submit** to send the object to workflow.



## Add dynamic participants

### Overview

*Dynamic participants* automatically assign users to perform different workflow tasks based on the participant types assigned to an object that has been submitted to a workflow.


Use the **Participants** tab to assign participants to an object.

- The workflow, configured for dynamic participants in Workflow Designer, reaches a task and determines the participants. It determines the current assignee for the participant type (for example, **Reviewer** for a **Review** task) and sends it to that user's inbox.
- If the 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 explicitly by selecting users. Those participants are fixed and cannot change. You can also assign a project team, 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.

### Assign dynamic participants

1. Select the object you want to submit to workflow.
2. Click **Manage**  > **Submit to Workflow** on the primary toolbar.
3. Select a workflow template with dynamic participants enabled. When you select the **Assignments** tab, **Participants** can be added manually, or may be populated already.

**Submit to Workflow** ×

Workflow Assignments

PARTICIPANTS

PROPOSED REVIEWER ⊕

 **Manufacturer, Manny (m...)**  
Engineering/Designer

PROPOSED RESPONSIBLE PARTY

 **Engineer, Ed (ed)**  
4G Tester/4GBOM Analyst

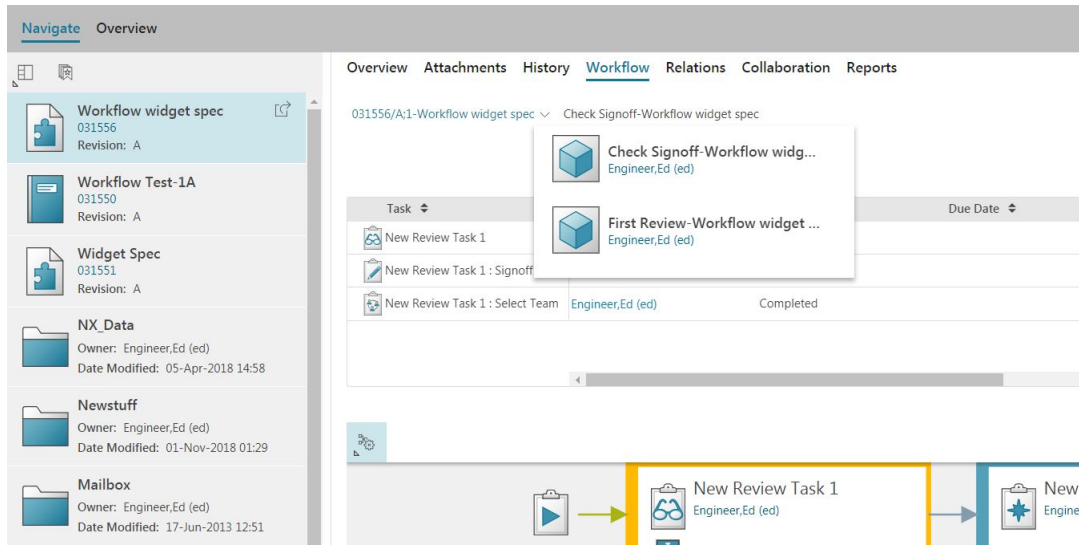
Submit

4. Click **Add** ⊕ next to **Proposed Reviewer** or **Proposed Responsible Party**.
5. 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.
6. Click **Add**.
7. Click **Submit**.

## Viewing objects assigned to multiple workflows

When an object is in a workflow and has gone through multiple workflow processes, you can see those processes and subprocess 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 subprocess in the workflow.

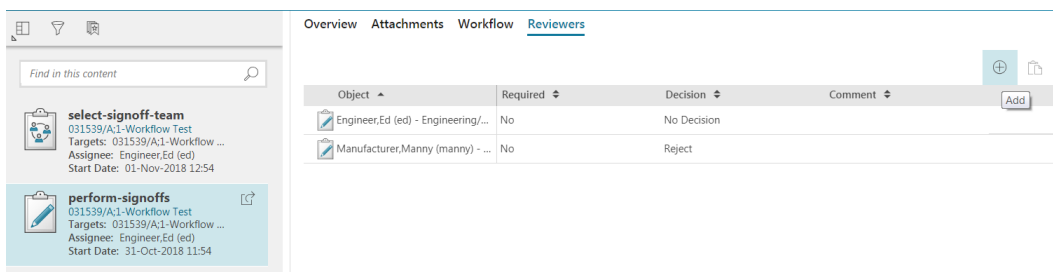


- By default, the latest active workflow is shown at the top of the list. Each tile contains the workflow name and owner
- When you select a previous workflow tile, the associated signoff table and workflow diagram are displayed.
- When you select a subprocess or previous workflow tile, the breadcrumb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

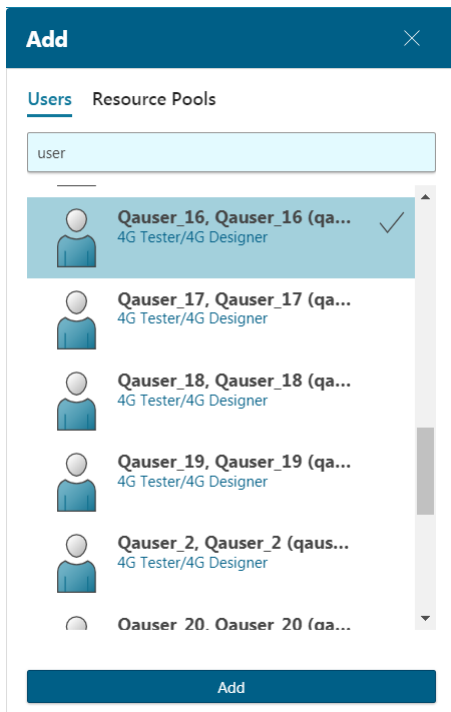
### Add additional reviewers to tasks

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

1. On the homepage, 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.



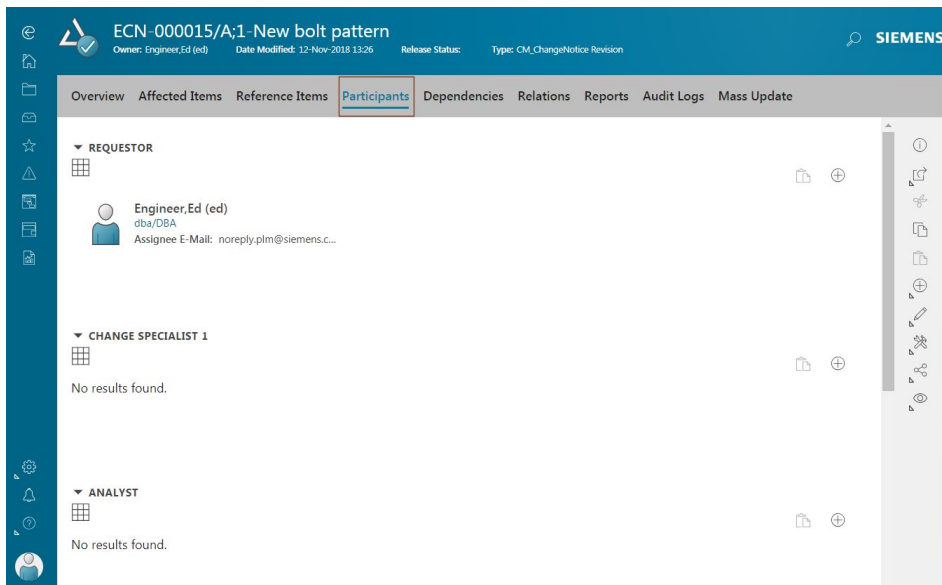
- Reviewers already assigned to the task do not display in the **Add** panel. You cannot add duplicate users with the same role. However, if a reviewer has multiple roles, or belongs to various groups, they will appear in the panel, and you can add these reviewers.
  - Select a group from the **Resource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

## 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**  $\oplus$  or **Replace**  $\leftrightarrow$  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 multiselect 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.

## 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.**

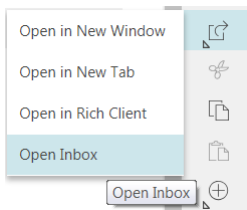
Managing the tasks of other users helps you balance their workloads or manage assignments if someone is out of the office. As a privileged user, you can [view the Profile page of a user](#), manage the user's surrogate assignments, or access their inbox to reassign a task.


## 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:

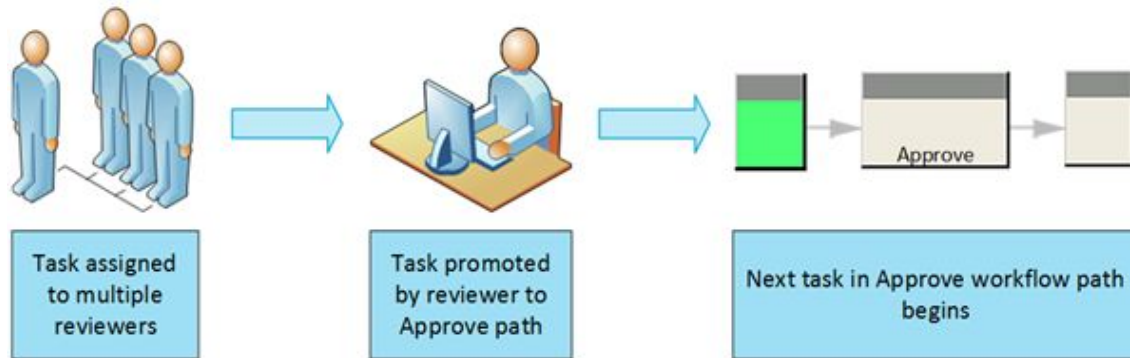
- Surrogate assignments
- Out-of-office dates
- (Privileged user only) **Open**  > **Open Inbox** on the primary toolbar



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.

## Promote a task

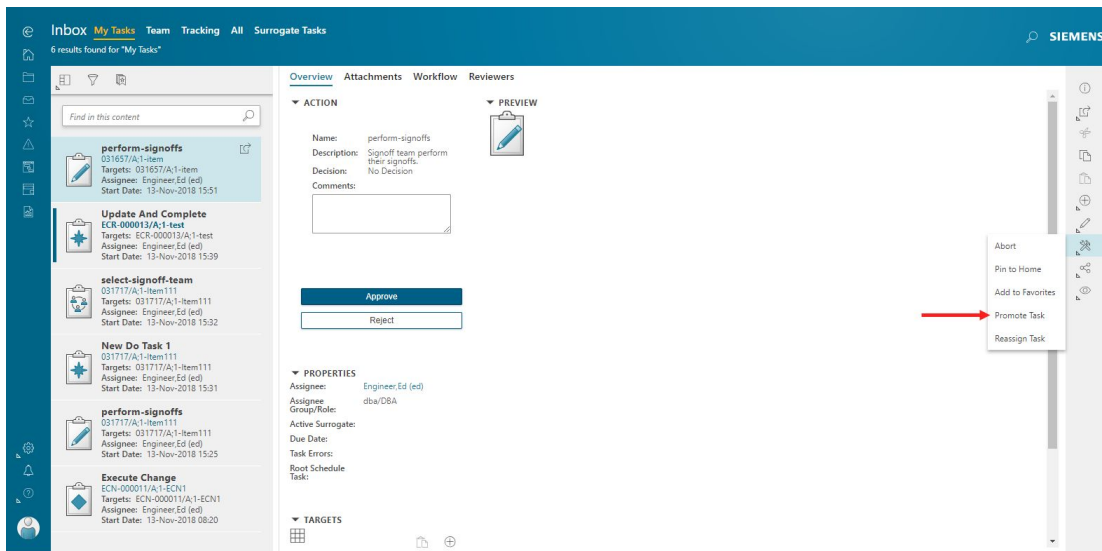
With the correct permissions, you can promote tasks to move them to the next step in the workflow. Promoted tasks, such as **Review**, **Route**, and **Do** tasks bypass reviews and move to the next step in the selected path. For example, if you have an urgent **Review** task that contains four reviewers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

**Note**




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.

2 results found for "My Tasks" >

 **New Do Task 2**  
bolt sv3/A:1  
Assignee: Engineer.Ed (ed)  
Start Date: 17-Sep-2015 15:45

 **perform-signoffs 1**  
140-f40001-17 1/A:1-Transfer C...  
Assignee: Engineer.Ed (ed)  
Start Date: 16-Sep-2015 16:01

Overview All Targets **Workflow**

TASK	PERFORMER	COMMENTS
 New Review Task 1	Engineer.Ed (ed)	Promoted by "Engineer.Ed (ed)". Urgent task. No time for all to review.
 New Review Task 1 : Select Team	Engineer.Ed (ed)	
 New Do Task 2	Engineer.Ed (ed)	



## Chapter 6: About engineering orders

An engineering order is used to manage changes that are introduced to parts. Engineering orders collect the change requirements that are sent through the Engineering Order workflow for review and approval. The Engineering Order workflow routes the engineering order to managers, designers, and checkers to be processed. Upon approval, new or updated parts are released to production, and replaced parts are made obsolete.

Components of an engineering order:

- Change request form that includes the reason for the change.
- Change notice form that includes information about details such as implementation, instructions, and timing for the change.
- Reference data sections for parts and documents that are new, revised, or obsolete



## Chapter 7: Create an engineering order





1. Select the folder where you want to create the engineering order.
2. In **Contents**, click **Add** ⊕.
3. In the **Add** panel, in **Type**, select **Engineering Order**.
4. In **Properties**, retain the default values for **ID** and **Revision**, and specify values for the **Name**, **Description**, and **Unit of Measure** parameters.
5. Click **Add**.






## Chapter 8: Update engineering orders

You can add data to an engineering order in two ways. You can either modify an existing engineering order, or you can copy data from an existing engineering order.

### Modify an existing engineering order

1. Navigate to the folder where you have created the engineering order.
2. Select the engineering order object to which you want to add data, and click the **Change Request** tab.
3. In **Properties**, click **Open**  to open the change request object.
4. Click **Checkout** , and then click **Start Edit** to make the required changes.
5. Click **Save**  to save your changes.
6. Click **Checkin**  to check in the object.

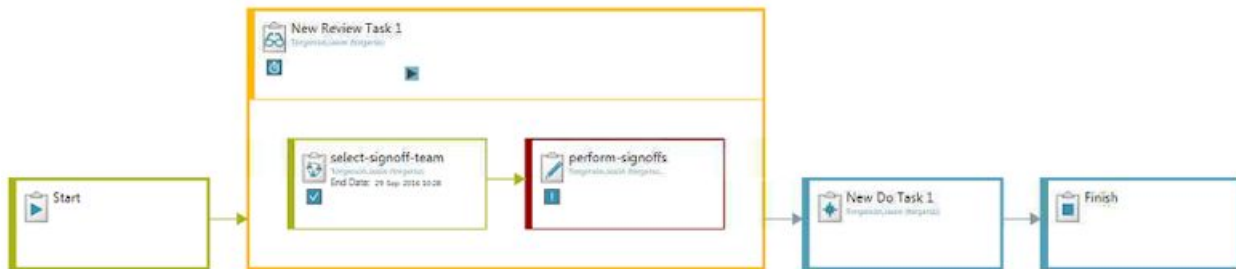
### Copy and add data to an engineering order

1. Search for or navigate to the engineering order object from which you want to copy the data.
2. Select the engineering order object and click **Save As or Revise** .
3. In the **Save As** panel, click **Revise**.
4. Click **Copy** .
5. Open the engineering order to which you want to add the data.
6. In the **Engineering Order** tab, under **Obsolete Parts**, click **Add** .
7. In the **Add** panel, in **Palette**, select the assembly where you want to paste the data.
8. Click **Add**.



## Chapter 9: Complete the engineering order workflow process

You can send or *submit* content to a workflow, which sends it through a series of required tasks, such as approvals (signoffs) and reviews, similar to the one shown below.




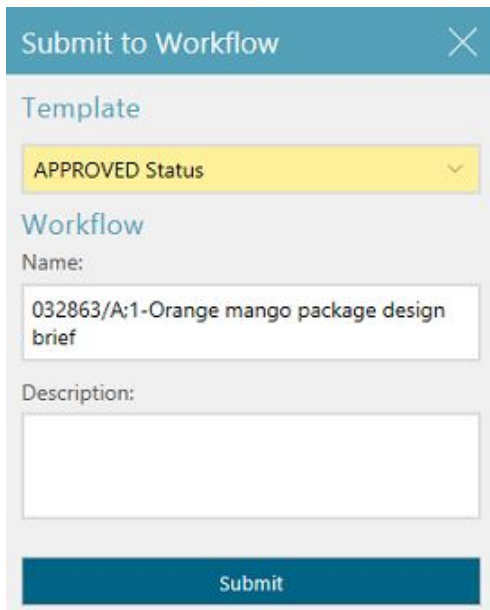
Your administrator can also assign default workflows for various content types, such as change requests or problem reports. Newly created content with an assigned workflow is automatically submitted to the workflow on creation. Existing content has the default workflow automatically set as **Workflow Template** when submitting it to a workflow.

The tasks initiated by the workflow initiates are sent to the recipients that perform the tasks. Depending 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.

1. Select the engineering order that you want to submit to the new workflow.
2. On the right, click **Submit to Workflow** .
3. Accept the default workflow name or type your own.
4. From the **Workflow Template** list, select a template for the new workflow.



Submit to Workflow

Template

APPROVED Status

Workflow

Name:

032863/A;1-Orange mango package design brief

Description:

Submit



**Note**

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

5. Enter a description for the new workflow.
6. Click **Submit**.




## Chapter 10: Add reviewers to an engineering order workflow task

1. Open the engineering order to which you want to add reviewers.
2. In the **Signoffs** tab, click **Perform Task** .
3. In the **Perform Task** panel, in **Engineering RapidStart/ Manager**, click **Add** .
4. Select the user whom you want to add as a reviewer and click **Complete**.



## Chapter 11: Approve the engineering order review task

1. Open the engineering order and click the **Signoffs** tab.
2. Click **Perform Task** .
3. In the **Perform Task** panel, enter your comments in the box, and click **Approve**.

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