



# TEAMCENTER

## Workflows and Tasks on Active Workspace

Teamcenter 2412

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# Contents

## Overview of workflows and tasks

What are workflows and tasks? .....	1-1
Task examples .....	1-2

## Submitting part data and documents to workflows

<b>Workflow participants</b> .....	2-1
Dynamic participants .....	2-1
The Workflow Admin role .....	2-5
<b>Start a workflow</b> .....	2-6
Submit to workflow .....	2-6
Submit a target object to a workflow .....	2-6
Submit a workflow without a target object .....	2-13
<b>Assign users to tasks</b> .....	2-21
Assign users to tasks when submitting a workflow .....	2-22
Assign users to tasks from the Upcoming Tasks table .....	2-22
Assign users to tasks from the Assignment tab .....	2-27
<b>Select a signoff team</b> .....	2-34

## Working with tasks

<b>Edit tasks within the Inbox</b> .....	3-1
Inbox .....	3-1
How are tasks assigned? .....	3-4
View workflow tasks .....	3-5
Sign off on a task .....	3-10
Perform a Do task .....	3-11
Perform a Form task .....	3-13
Set the task priority .....	3-15
Reassign a task to another user .....	3-16
Claim a task belonging to a team .....	3-28
Surrogates .....	3-29
Subworkflows .....	3-35
Suspend a task .....	3-44
Resume a task .....	3-45
Promote a task .....	3-46
Demote a task .....	3-48
Add additional reviewers to tasks .....	3-50
Remove reviewers .....	3-53
Abort a workflow .....	3-56
Enable remote inboxes .....	3-57
Error processing .....	3-62
<b>Edit tasks outside of the inbox</b> .....	3-65
Assignment lists .....	3-65
Viewing objects assigned to multiple workflows .....	3-78

Assign or replace participants for a workflow	3-79
View another user's profile and inbox	3-81
Perform a task in the Changes Overview tab	3-82
Task forwarding	3-85

## View workflow progress

<b>Workflow reports</b>	4-1
<b>Use the Workflow Dashboard</b>	4-1
Open a workflow report	4-1
View the workflow report data	4-2
<b>Generate a Signoff History report</b>	4-4

## Workflow configuration

<b>Configuration tasks</b>	5-1
Configuring resource pool assignments	5-1
Setting conditions for workflows	5-1
Showing user assignment options	5-2
Configuring workflows	5-2
Configuring the Inbox	5-3

# 1. Overview of workflows and tasks

## What are workflows and tasks?

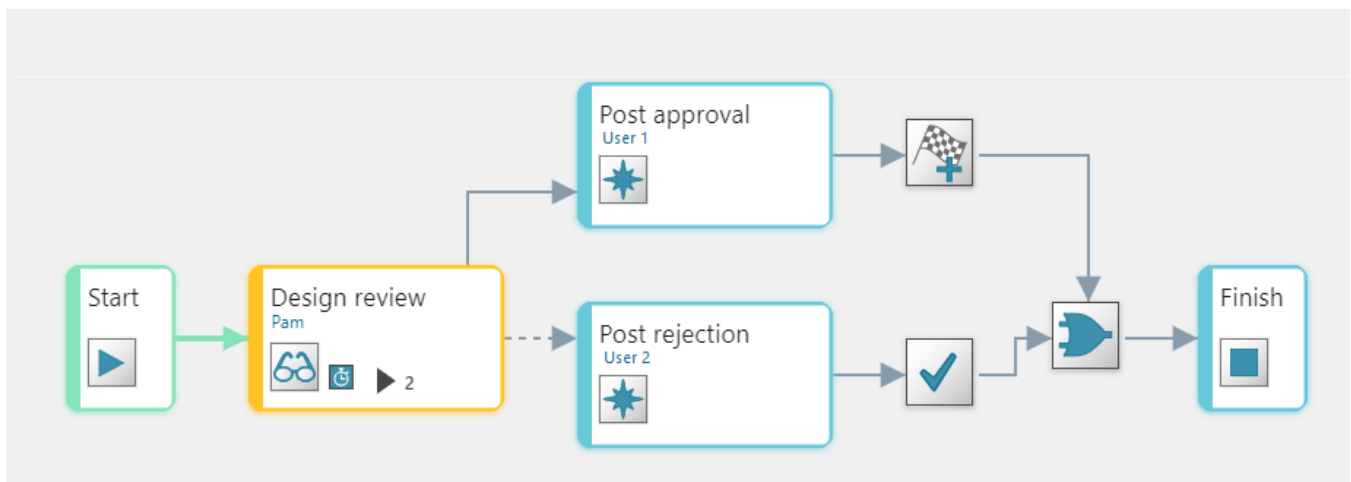
Workflows and tasks streamline a business process to accomplish an objective. Working together, workflows and tasks ensure that no steps in a process are missed, that the steps progress in the right order, and that the correct things happen after all of the steps are completed.

*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.

You have 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 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 **Send Email** task) and the workflow finishes.



You can use workflows 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.

 <b>Business User</b>	Business users can initiate or participate in workflows.
Who can contribute to workflows?	<b>Workflow participants</b>
Get me started with starting a workflow	<b>Start a workflow</b>
Where and how to assign users to tasks	<b>Assign users to tasks</b>
Where and how to view tasks	<b>View workflow tasks</b>
Complete a task	<b>Sign off on a task</b> <b>Perform a Do task</b> <b>Perform a Form task</b>
View workflow progress	<b>Workflow reports</b>
 <b>Administrator</b>	<p>An <b>Administrator</b>, or a workflow template designer, is the only user who can create, modify, delete, import, or export existing templates in the <b>Workflow Designer</b>. These templates are then made available to the <b>Business User</b> to apply to objects and create workflows, as described in <b>Workflows and Tasks</b>.</p> <p>See Workflow Designer on Active Workspace for more information.</p> <p>An Administrator can provide workflow runtime administration capabilities to non-DBA users with the <b>Workflow Admin</b> role. This role is useful when a workflow is stuck because a user (or surrogate) is unable to complete a task.</p>

## 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
<b>Select a signoff team</b>	A task to <b>select the team</b> to review the target of the workflow and indicate approval. Once you complete the <b>select-signoff-team</b> task, the <b>perform-signoffs</b> tasks are generated for each reviewer.

Task	Description
	The <b>select-signoff-team</b> task is often the first task in a workflow; the user who initiated the workflow performs this task.
<b>Do task</b>	A task that <b>provides instructions for you to follow</b> , for example, a task to validate a change.
<b>Sign off task</b>	A task to <b>review and approve an object</b> , 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** 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.

Overview Attachments Workflow Assignments

Remove Replace Start Edit

Task	Status	Assignee	Assignee Origin	Signoff Profile	Decision	Required
Participant Assignments	Started	ed (ed)				
Specialist: CRB Assignment	Pending	ed (ed)				
CRB review	Pending	ed (ed)				
		Unstaffed		Change Review Board		
Analyst identifies the Impacted Items, ...	Pending	Unstaffed		Analyst		
Specialist sets CRB Decision	Pending	Unstaffed		Change Specialist I		
Specialist completes Planning	Pending	Unstaffed		Change Specialist I		
Specialist closes PRs	Pending	Unstaffed		Change Specialist I		

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.

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

Note:

The **Fnd0ParticipantEligibility** constant identifies the **group** and **role** criteria for assigning dynamic participants. Example syntax for adding **group/roles** include:

- Test Lead (single assignment) value=**Engineering::Designer**
- Test Supervisor (single assignment) value=**dba:::Analyst**
- Test Team (multi-assignment) value=**Engineering++::\***
- Test Contributors (multi-assignment) value=**Engineering+ +::\*,dba::\*,GroupA::RoleA,\*::Designer,Workflow Reports++::Designer**
- Test Member (single assignment) value=**Workflow General.Workflow Reports::Designer**

## 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 and later.

## 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, on the **Assignments** tab, 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**.

## Submit to Workflow


Workflow Assignments

Assignment List

Click to add a value

Task	Assignee	Origin
 Analyst: Identify Impacted Items, Propose Solution, Estimate Cost	Unstaffed	Analyst
 Specialist: Set Change Review Board Decision	Unstaffed	Change Specialist I
 Specialist: Planning Complete?	Unstaffed	Change Specialist I

▼ ASSIGNEE

 Change Specialist I











▼ CHANGE SPECIALIST I

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.

▼ Upcoming Tasks

Task	Status	Assignee	Assignee Origin	Signoff Profile	Decision	Required
 Participant Assignments	Started	 ed (ed)				
 Specialist: CRB Assignment	Pending	 ed (ed)				
 CRB review	Pending	 ed (ed)				
		Unstaffed	Change Review Board			
 Analyst identifies the Impacted Items, ...	Pending	Unstaffed	Analyst			
 Specialist sets CRB Decision	Pending	Unstaffed	Change Specialist I			
 Specialist completes Planning	Pending	Unstaffed	Change Specialist I			
 Specialist closes PRs	Pending	Unstaffed	Change Specialist I			

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.

Task	Status	Assignee	Assignee Origin	Signoff Profile	Decision	Required
Participant Assignments	Started	ed (ed)				
Specialist: CRB Assignment	Pending	ed (ed)				
CRB review	Pending	ed (ed)				
		Unstaffed		Change Review Board		
Analyst identifies the Impacted Items, ...	Pending	Unstaffed		Analyst		
Specialist sets CRB Decision	Pending	Unstaffed		Change Specialist I		
Specialist completes Planning	Pending	Unstaffed		Change Specialist I		
Specialist closes PRs	Pending	Unstaffed		Change Specialist I		

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

See [Assign users to tasks](#) for detailed instructions.

## The Workflow Admin role

The **Workflow Admin** role provides workflow runtime administration capabilities to non-**DBA** users. This can be useful when a workflow is stuck because a user (or surrogate) is unable to complete a task. The **Workflow Admin** role can perform an action on the task based on the user's behalf to keep the workflow running smoothly.

The **Workflow Admin** capabilities are provided out of the box and the **Workflow Admin** can be added to a new or existing group. Users can then be added to the **Workflow Admin** role to be able to perform specific actions.

Actions the **Workflow Admin** role can perform include:

- **Reassign a task**
- Complete a task
- Complete a task after an error has occurred
- **Approve/reject** a Perform Signoff task
- **Promote/demote** a task
- **Demote a task**

**Note:**

To enable the **Workflow Admin** role to promote or demote a task, an administrator must modify the access control list (ACL) to grant promote/demote privileges to the **Workflow Admin** role.

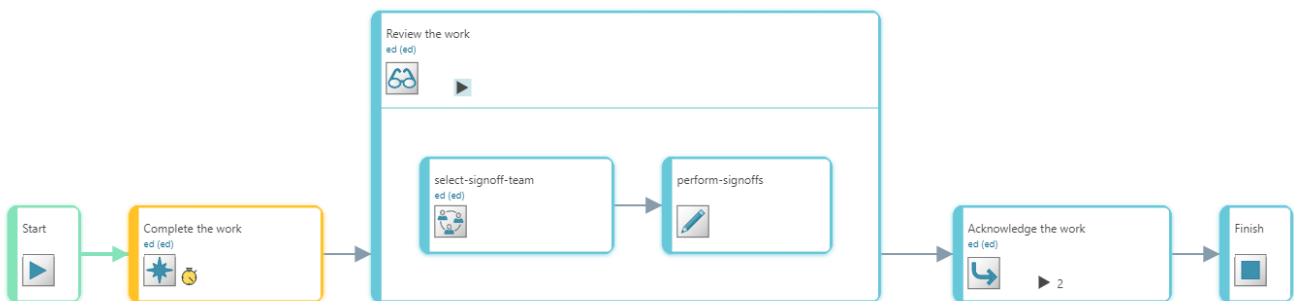
Once enabled, the **Workflow Admin** role can be accessed by clicking the profile icon and selecting it from the **Role** drop-down list.

## Start a workflow

### Submit to workflow

Submitting content to a workflow initiates a series of predefined actions and approvals that guide your project through its necessary stages. This process kicks off automated tasks, notifications, and reviews, ensuring that each step is completed in a timely and organized manner.

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**. See [Configuring objects](#) for more information.

### 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. Go to **More Commands** **...** > **Manage** > **Submit to Workflow** .

The **Submit to Workflow** panel displays.

3. 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.

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. This can be an ad-hoc description that provides task assignees with extra context about the workflow.
7. Objects submitted to the workflow are displayed in the **Targets** section of the panel. To add an additional target object(s), click **Add** ⊕. Any type of object can be added to a workflow, as there are no template restrictions.

The **Add** panel displays. Any 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 keyword or an advanced 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.

8. Expand the **References** section. To add a reference, click **Add** ⊕. The **Add** panel displays, 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 keyword or an advanced 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.

9. Click the **Assignments** tab if you want to assign group members or resource pools to the workflow.

The panel changes to display assignees and reviewers that you can assign to a task. 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.

10. 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.

11. Filters are available in the middle panel.

You can increase the size of the panel by dragging the left side of the panel to the left.

- a. Use the top-most search box to search for a single group member or group/role. For example, entering **Admin** returns all the available group members and resource pools containing that specific string.

**Submit to Workflow** Close

Workflow Assignments

Assignment List:  
Click to add a value

Task	Assignee	Ori
Complete the work		
Review the work		
	Unstaffed from GroupA... *	
	Unstaffed from Enginee... *	
Acknowledge the work		

▼ Assignee

Admin

Filters

Filter by Property

▼ Type

Group Member (222)

Resource Pool (79)

▼ Group

Filter

ADA Administrator (5)

ANY (25)

Administrators.MyOrg (3)

Authentication (2)

Change Specialist (1)

[More...](#)

▼ Role

Results (301)

ADA Sit...

Admin

Adminis...

Audit A...

IP Admin

ITAR Ad...

MFGAd...

NCTool...

OAuth ...

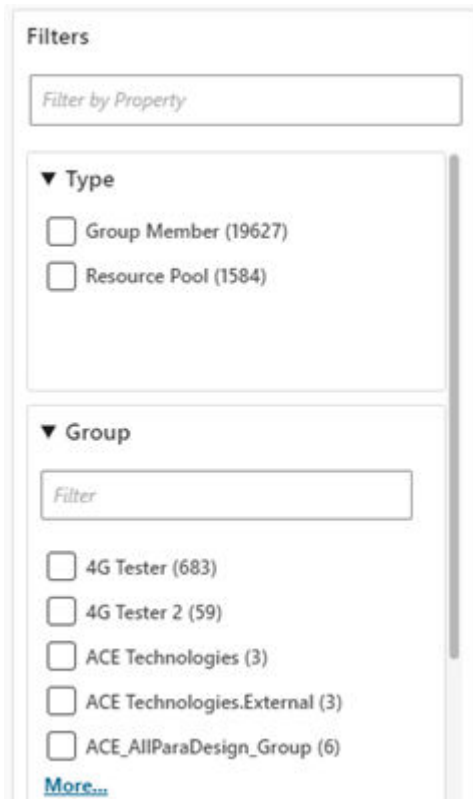
Partner...

Submit

Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).

Once a search is performed and the results display in the right panel, this top-most search box can be used again to additionally narrow those results.

- b. Filters are defaulted to **Type**, **Group**, or **Role**. If the target is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.



- c. Under **Type**, specify either a **Group Member** or a **Resource Pool**.
- d. Specify group members for the task by **Group** or **Role**, as necessary. Enter a name in the specific search box to filter.
12. Once any filters have been applied, results display on the right-side of the panel. Select a group member or resource pool for the task from the results and drag it to the **Assignee** column of the task table to populate the assignee.

The screenshot displays the 'Submit to Workflow' interface, specifically the 'Assignments' section. The interface is divided into several panels:

- Workflow Assignments:** Shows a table with columns for Task, Assignee, and Ori. The 'Assignee' column is currently empty, with a dropdown menu above it that says 'Click to add a value'.
- Assignment List:** A table with the following rows:

Task	Assignee	Ori
Complete the work	SchMgr...	
Review the work		
	Unstaffed from GroupA...	*
	Unstaffed from Enginee...	*
Acknowledge the work		
- Filters:** A panel on the right with a search bar and filter options:
  - Type:** Group Member (222), Resource Pool (79)
  - Group:** ADA Administrator (5), ANY (25), Administrators.MyOrg (3), Authentication (2), Change Specialist (1), [More...](#)
  - Role:**
- Results (301):** A list of 301 results, each represented by a group icon and a label (e.g., Project..., Report..., SchMgr..., Simulati..., Structur...). One 'SchMgr...' result is highlighted with a blue box.

A red arrow points from the highlighted 'SchMgr...' result in the 'Results' panel to the 'Assignee' column in the 'Assignment List' table, indicating the drag-and-drop action.

**Submit**

You can also drag and drop a group member or resource pool from the results to the **Assignee** section.

**Submit to Workflow** Close

Workflow Assignments

Assignment List:

Click to add a value

Task	Assignee	Ori
Complete the work		
Review the work		
	Unstaffed from GroupA...*	
	Unstaffed from Enginee...*	
Acknowledge the work		

▼ Assignee

SchMgr...

Admin Close

Filters

Filter by Property

▼ Type

Group Member (222)

Resource Pool (79)

▼ Group

Filter

ADA Administrator (5)

ANY (25)

Administrators.MyOrg (3)

Authentication (2)

Change Specialist (1)

[More...](#)

▼ Role

Results (301)

Project ...

Project ...

Project...

Report ...

SchMgr...

SchMgr...

SchMgr...

Simulati...

Simulati...

Structur...

**Submit**

Additionally, you can select a group member or resource pool from the results, and then click **Assign**

The screenshot displays the 'Submit to Workflow' interface. At the top, there is a 'Workflow' section with a sub-tab for 'Assignments'. Below this, an 'Assignment List' is shown with a dropdown menu that says 'Click to add a value'. The main area contains a table with columns for 'Task', 'Assignee', and 'Ori'. The tasks listed are 'Complete the work', 'Review the work', and 'Acknowledge the work'. The 'Assignee' column shows 'Unstaffed from GroupA...' and 'Unstaffed from Enginee...'. Below the table, there is an 'Assignee' section with a red box around the 'Assign' button. To the right, there is an 'Admin' panel with 'Filters' and 'Results (301)'. The 'Filters' section includes a 'Filter by Property' dropdown, a 'Type' section with 'Group Member (222)' and 'Resource Pool (79)', and a 'Group' section with a 'Filter' dropdown and several group options like 'ADA Administrator (5)', 'ANY (25)', 'Administrators.MyOrg (3)', 'Authentication (2)', and 'Change Specialist (1)'. The 'Results (301)' section shows a list of items with icons, including 'Project ...', 'Report ...', 'SchMgr...', 'Simulati...', and 'Structur...'. A 'Submit' button is located at the bottom right of the interface.

Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

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

**Submit to Workflow** Close

Workflow Assignments

Assignment List:

Task	Assignee	Origin
Complete the work		
Review the work		
	Unstaffed from GroupA... *	
	Unstaffed from Engine... *	
Acknowledge the work		

▼ Reviewers

- 1 Required**  
GroupA/RoleA
- 2 Required**  
Engineering/Designer

ed Close

Filters

Filter by Property

▼ Type

- Group Member (412)
- Resource Pool (67)

▼ Group

Filter

- 4G Tester 1 (1)
- 4G Tester 2 (1)
- ANY (26)
- AWA Engineering (2)
- CFx\_CancelEdit\_Group (5)

[More...](#)

▼ Role

Results (479)

- Advanc...
- CFx\_Ca...
- CFx\_Re...
- Interest...
- SchMgr...
- SchMgr...
- SchMgr...
- SchMgr...
- testedar...
- testedar...
- testedar...

**Submit**

Or, select a group member or resource pool from the results, click the profile name icon so it is highlighted, and then click **Assign** . Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

13. Once the assignments are complete, click **Submit**.

## Submit a workflow without a target object

Do the following to start a workflow without a target:

1. From your **Inbox**, go to **More Commands ...** > **New** > **Create Workflow**.

The **Submit to Workflow** panel displays.

- 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.

- At this point, you can click **Submit** and the workflow is started. To make additional specifications to the workflow, continue with the procedure.
- Accept the default workflow name or enter your own.

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

- Enter a description for the workflow. This can be an ad-hoc description that provides task assignees with extra context about the workflow.
- Click **Add** ⊕ to add target objects.

Any type of object can be added to a workflow, as there are no template restrictions.

The **Add** panel displays. Any 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 keyword or an advanced 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.

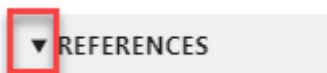
Note:

You can start the workflow without adding any targets.

- Expand the **References** section. 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.

Click the expand button to see the newly added objects.



- Click the **Assignments** tab if you want to assign group members or resource pools to the workflow.

The panel changes to display assignees and reviewers that you can assign to a task. 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.

9. 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.

10. Filters are available in the middle panel.

You can increase the size of the panel by dragging the left side of the panel to the left.

- a. Use the top-most search box to search for a single group member or group/role. For example, entering **Admin** returns all the available group members and resource pools containing that specific string.

The screenshot displays the 'Submit to Workflow' interface. At the top, there's a 'Workflow' section with 'Assignments' selected. Below it is an 'Assignment List' with a search box containing 'Click to add a value'. A table lists tasks: 'Complete the work', 'Review the work', and 'Acknowledge the work'. The 'Review the work' task has two assignees: 'Unstaffed from GroupA...' and 'Unstaffed from Enginee...'. Below the table is an 'Assignee' dropdown menu. To the right, a 'Filters' panel is open, showing 'Type' (Group Member (222), Resource Pool (79)), 'Group' (ADA Administrator (5), ANY (25), Administrators.MyOrg (3), Authentication (2), Change Specialist (1)), and 'Role'. The 'Results (301)' panel shows a list of assignees, with 'Admin' highlighted by a red box and a red arrow pointing to the search box above it.

Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).

Once a search is performed and the results display in the right panel, this top-most search box can be used again to additionally narrow those results.

- b. Filters are defaulted to **Type**, **Group**, or **Role**. If the target is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.

**Filters**

Filter by Property

▼ **Type**

Group Member (19627)

Resource Pool (1584)

▼ **Group**

Filter

4G Tester (683)

4G Tester 2 (59)

ACE Technologies (3)

ACE Technologies.External (3)

ACE\_AllParaDesign\_Group (6)

[More...](#)

- c. Under **Type**, specify either a **Group Member** or a **Resource Pool**.
  - d. Specify group members for the task by **Group** or **Role**, as necessary. Enter a name in the their specific search box to filter.
11. Once any filters have been applied, results display on the right-side of the panel. Select a user or resource pool for the task from the results and drag it to the **Assignee** column of the task table to populate the assignee.

The screenshot shows the 'Submit to Workflow' interface with the 'Assignments' tab selected. The 'Assignment List' table has columns for 'Task', 'Assignee', and 'Ori'. The 'Assignee' column contains a group member icon labeled 'SchMgr...' which is highlighted by a red arrow. Below the table is an 'Assignee' section with a dropdown arrow. To the right, the 'Admin' panel shows 'Filters' and 'Results (301)'. The 'Results' list includes various group members and resource pools, with one 'SchMgr...' member highlighted in blue. A red arrow points from this highlighted member to the 'SchMgr...' entry in the 'Assignee' column of the 'Assignment List' table. A 'Submit' button is located at the bottom right of the interface.

You can also drag and drop a group member or resource pool from the results to the **Assignee** section.

**Submit to Workflow** Close

Workflow Assignments

Assignment List:  
Click to add a value

Task	Assignee	Ori
Complete the work		
Review the work		
	Unstaffed from GroupA...*	
	Unstaffed from Enginee...*	
Acknowledge the work		

▼ Assignee

SchMgr...

Admin Close

Filters

Filter by Property

▼ Type

Group Member (222)

Resource Pool (79)

▼ Group

Filter

ADA Administrator (5)

ANY (25)

Administrators.MyOrg (3)

Authentication (2)

Change Specialist (1)

[More...](#)

▼ Role

Results (301)

Project ...

Project ...

Project...

Report ...

SchMgr...

SchMgr...

SchMgr...

SchMgr...

Simulati...

Simulati...

Structur...

**Submit**

Additionally, you can select a group member or resource pool from the results, and then click **Assign** in the **Assignments** panel.

The screenshot displays the 'Submit to Workflow' interface. At the top, there is a 'Workflow' section with a sub-tab for 'Assignments'. Below this is an 'Assignment List' with a dropdown menu labeled 'Click to add a value'. The main area contains a table with columns for 'Task', 'Assignee', and 'Ori'. The tasks listed are 'Complete the work', 'Review the work', and 'Acknowledge the work'. The 'Assignee' column shows 'Unstaffed from GroupA...' and 'Unstaffed from Enginee...'. Below the table is an 'Assignee' section with a red box around the 'Assign' button. To the right is a 'Filters' panel with sections for 'Type' (Group Member (222), Resource Pool (79)), 'Group' (ADA Administrator (5), ANY (25), Administrators.MyOrg (3), Authentication (2), Change Specialist (1)), and 'Role'. A 'Results (301)' panel on the far right shows a list of items, with one 'SchMgr...' item highlighted. A 'Submit' button is located at the bottom right.

Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

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

**Submit to Workflow** Close

Workflow Assignments

Assignment List:

*Click to add a value*

Task	Assignee	Ori
Complete the work		
Review the work		
	Unstaffed from GroupA... *	
	Unstaffed from Engine... *	
Acknowledge the work		

▼ Reviewers

- 1 Required GroupA/RoleA
- 2 Required Engineering/Designer

ed

Filters

Filter by Property

▼ Type

- Group Member (412)
- Resource Pool (67)

▼ Group

Filter

- 4G Tester 2 (1)
- 4G Tester 2 (1)
- ANY (26)
- AWA Engineering (2)
- CFx\_CancelEdit\_Group (5)

[More...](#)

▼ Role

Results (479)

- Advanc...
- CFx\_Ca...
- CFx\_Re...
- Interest...
- SchMgr...
- SchMgr...
- SchMgr...
- testedar...
- testedar...
- testedar...

**Submit**

Or, select a group member or resource pool from the results, and then click **Assign**. Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

12. Once the assignments are complete, click **Submit**.

## Assign users to tasks

There are various ways to assign users to tasks. 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.

## Assign users to tasks when submitting a 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.

## Assign users to tasks from the 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.

### Procedure

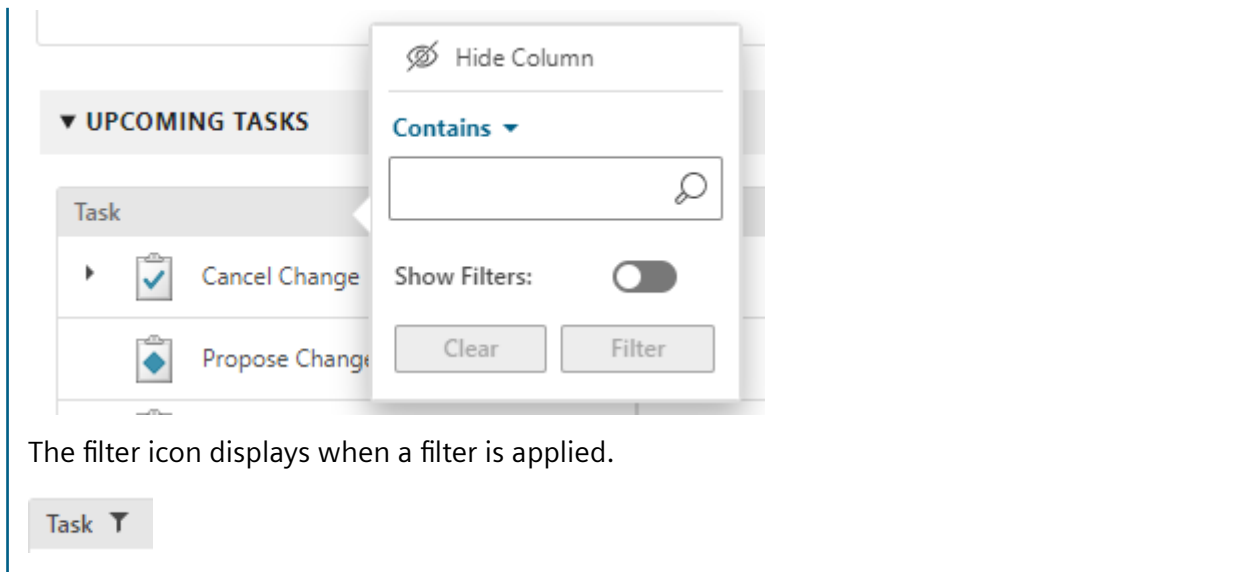
1. Select a task from the **Inbox** and click the **Workflow** tab.
2. Expand the **Upcoming Tasks** table.



▼ Upcoming Tasks						
Task	Status	Assignee	Assignee Origin	Signoff Profile	Decision	Required
Participant Assignments	Started	ed (ed)				
Specialist assigns Analyst	Pending	Unstaffed	Change Specialist I			
Analyst reproduces problem	Pending	Unstaffed	Analyst			
Analyst determines root cause and sev...	Pending	Unstaffed	Analyst			
Requestor provides more information	Pending	ed (ed)	Requestor			
Requestor: Acknowledge PR Unreprod...	Pending					
		ed (ed)				
		demo/Designer/ed (ed)	Requestor			No
Specialist determines resolution	Pending	Unstaffed	Change Specialist I			
Specialist investigates PR	Pending	Unstaffed	Analyst			

The table displays the **Task** name, **Status**, **Assignee** name, **Assignee Origin** (if the user is from a resource pool, PAL, or is a dynamic participant), the **Signoff Profile** if one was determined in the Workflow Designer, if a **Decision** was made, and if the task is required.

#### Note:

You can search for a specific task using filters by clicking the **Task Name** column (only in non-edit mode).



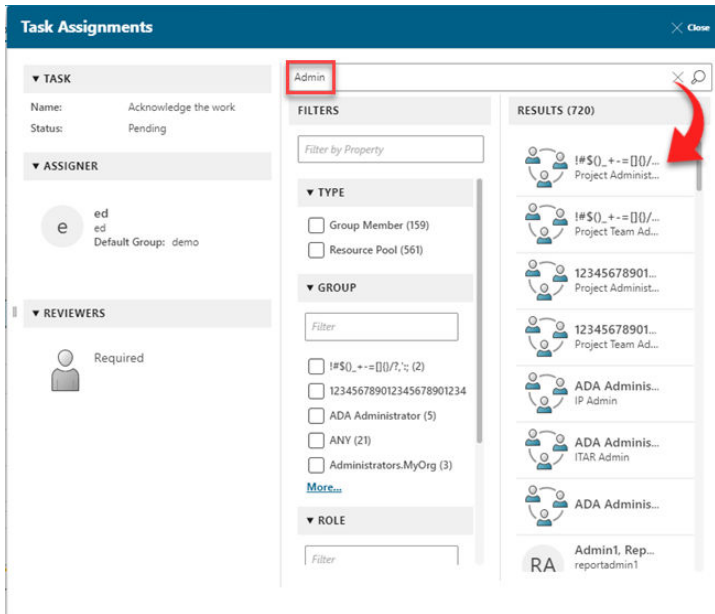
3. Click **Edit** .
4. Only top-level tasks are displayed by default. Expand () any parent tasks to view the child tasks.
5. Click the task containing the assignment that you want to edit.

The **Task Assignments** dialog opens and displays the task name and status, as well as assignees and reviewers that you can assign to a task.

Note that you can increase the size of the panel by dragging the left side of the panel to the left.

6. Filters are available in the middle panel.
  - a. Use the top-most search box to filter by a single group member or group/role. For example, entering **Admin** returns all the available group members and resource pools containing that specific string.

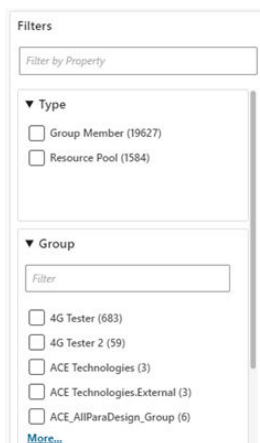
## 2. Submitting part data and documents to workflows



Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).

Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- b. Filters are defaulted to **Type**, **Group**, or **Role**. A search box narrows your search to a specific property.

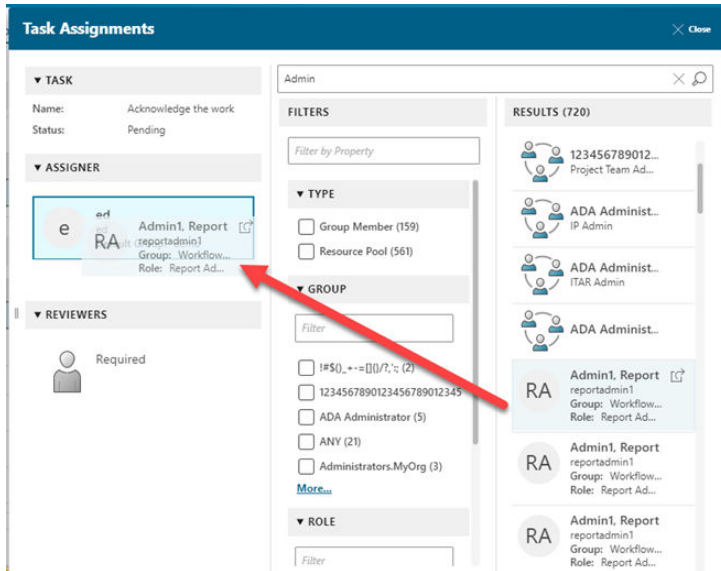



- c. Under **Type**, specify either a **Group Member** or a **Resource Pool**.
- d. Specify group members for the task by **Group** or **Role**, as necessary. Enter a name in the specific search box to filter.

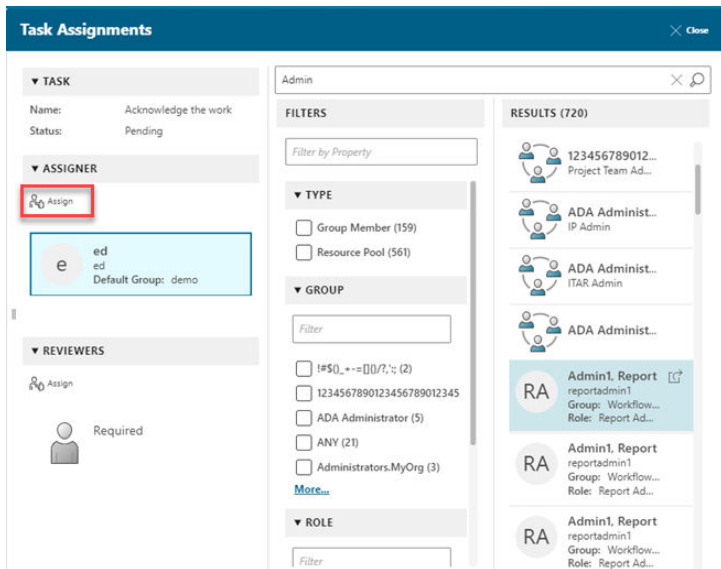
Once any filters have been applied, results display on the right-side of the panel.

- Select a group member or resource pool for the task from the results and drag it to the **Assignee** section to populate or change the assignee.

In this example, a search produced a new group member to replace the Assignee.



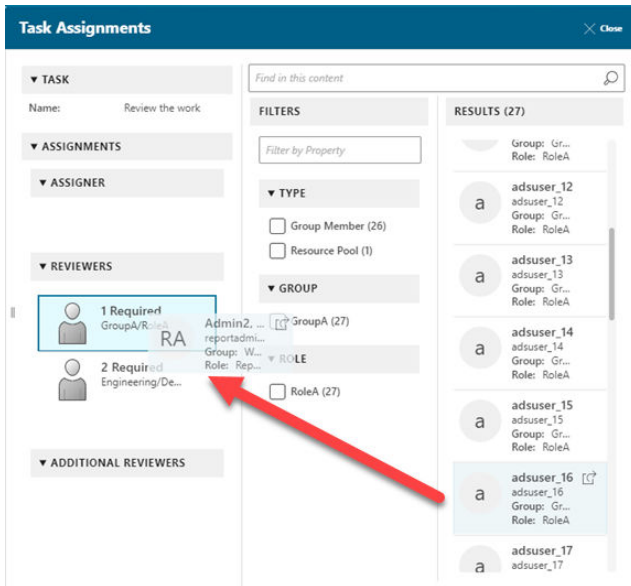
Additionally, you can select a group member or resource pool from the results, and then click **Assign** .



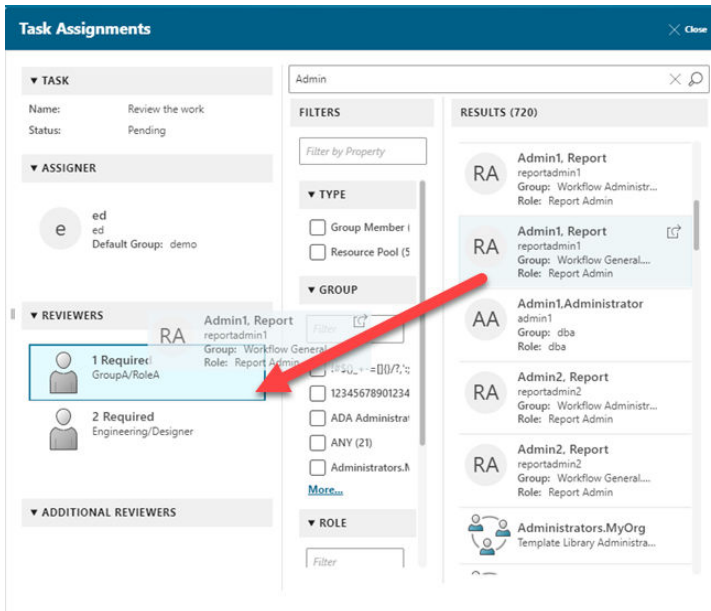
Select a group member or resource pool to display the **Remove** button to remove them from an assignment.


For a **Review** task, drag and drop a group member or resource pool to the highlighted **Required** icon.



## 2. Submitting part data and documents to workflows



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



Or, select a group member or resource pool, click the profile name icon so it is highlighted, and then click **Assign**  under the specific section. Click **Remove** to remove a group member or resource pool from an assignment.

8. Click **Modify**.
9. Click **Save Edit**  above the **Upcoming Tasks** table to save your edits. Click **Cancel**  to discard any changes.

## Assign users to tasks from the Assignment tab

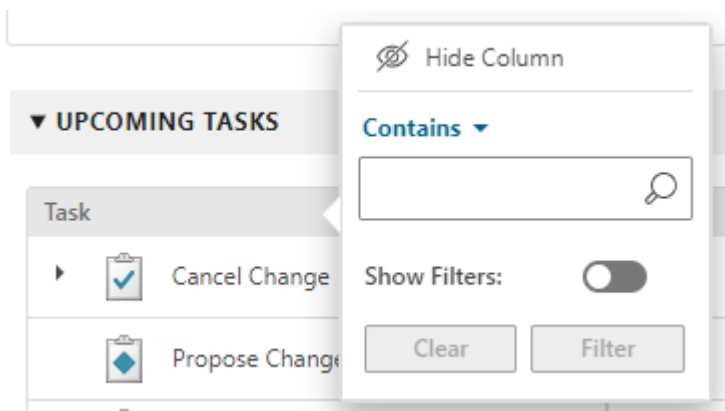
The **Assignments** tab shows all available tasks and the various assignments according to the workflow. You can assign or replace task participants using the task table.

### Procedure


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

Note:

You can search for a specific task using filters by clicking the **Task Name** column (only in non-edit mode).



The filter icon displays when a filter is applied.

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.

Task	Status	Assignee	Assignee Origin	Signoff Profile	Decision	Required
Complete the work	Started	ed (ed)				
Review the work	Pending	ed (ed)				
		Unstaffed from GroupA/RoleA/1	*	GroupA/RoleA/1		
		Unstaffed from Engineering/Designer/2	*	Engineering/Designer/2		
Acknowledge the work	Pending	ed (ed)				

The table displays the **Task** name, **Status**, **Assignee** name, **Assignee Origin** (if the user is from a resource pool, PAL, or is a dynamic participant), the **Signoff Profile** if one was determined in the Workflow Designer, if a **Decision** was made, and if the task is required.

The table displays the Task name, Status, Assignee name, Assignee Origin (if the user is from a resource pool, PAL, or is a dynamic participant), the Signoff Profile if one was determined in the Workflow Designer, if a Decision was made, and if the task is required.

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

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

The **Task Assignments** dialog opens and displays the task name and status, as well as assignees and reviewers that you can assign to a task.

Note that you can increase the size of the panel by dragging the left side of the panel to the left.

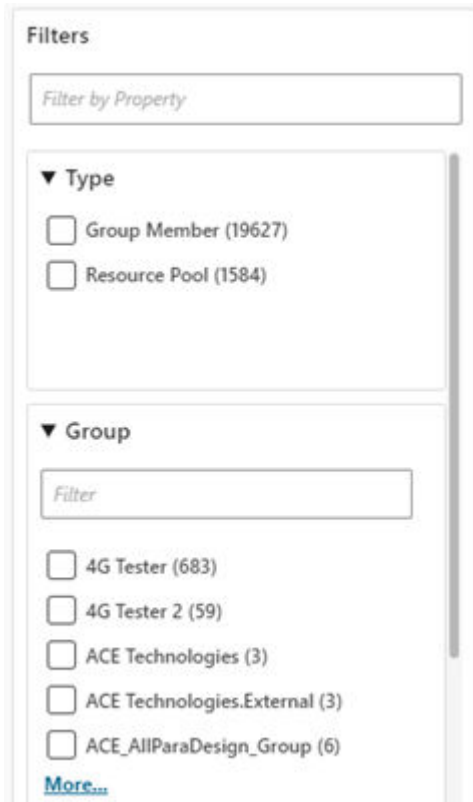
5. Filters are available in the middle panel.
  - a. Use the top-most search box to search for a single group member or group/role. For example, entering **Admin** returns all the available group members and resource pools containing that specific string.

The screenshot shows the 'Task Assignments' window. On the left, the 'TASK' section shows 'Name: Acknowledge the work' and 'Status: Pending'. Below it, the 'ASSIGNER' section shows a user profile for 'ed' with 'Default Group: demo'. The 'REVIEWERS' section shows a 'Required' reviewer icon. The main area is divided into 'FILTERS' and 'RESULTS (720)'. The 'FILTERS' section has a search box containing 'Admin' (highlighted with a red box) and several filter categories: 'TYPE' (Group Member (159), Resource Pool (561)), 'GROUP' (with a search box and several options like 'ADA Administrator (5)', 'ANY (21)', 'Administrators.MyOrg (3)'), and 'ROLE' (with a search box). The 'RESULTS' section shows a list of results, each with a group icon and text like 'Project Administ...'. A red arrow points to the search box in the results section.

Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).

Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- b. Filters are defaulted to **Type**, **Group**, or **Role**. A search box narrows your search to a specific property.



- c. Under **Type**, specify either a **Group Member** or a **Resource Pool**.
- d. Specify group members for the task by **Group** or **Role**, as necessary. Enter a name in the specific search box to filter.

Once any filters have been applied, results display on the right-side of the panel.

6. Select a group member or resource pool for the task from the results and drag it to the **Assignee** section to populate or change the assignee.

In this example, a search produced a new group member to replace the Assignee.

**Task Assignments** Close

**▼ TASK**

Name: Complete the work

Status: Started

**▼ ASSIGNEE**

Assign

**Admin** Filter

**FILTERS**

Filter by Property

Group Member (159)

Resource Pool (561)

**▼ GROUP**

Admin2, Rep... reportadmin2 Group: Workfl... Role: Report A...

!#\$%\_+\*=[]{}/?,:; (2)

123456789012345678901;

ADA Administrator (5)

ANY (21)

Administrators.MyOrg (3)

[More...](#)

**▼ ROLE**

Filter

ADA Site Admin (1)

ANY (8)

Audit Admin (5)

Change Specialist (1)

DBA (48)

[More...](#)

**RESULTS (720)**

RA Admin1, Rep... reportadmin1 Group: Workfl... Role: Report A...

AA Admin1,Adm... admin1 Group: dba Role: dba

RA Admin2, Rep... reportadmin2 Group: Workfl... Role: Report A...

RA Admin2, Rep... reportadmin2 Group: Workfl... Role: Report A...

Administrato... Template Librar...

Administrato...

AP Amy Product... amy\_pme\_admin Group: Market... Role: Product ...

Authenticati... OAuth Admin

CFx\_WS\_Test...

Additionally, you can select a group member or resource pool from the results, and then click **Assign** .

**Task Assignments** Close

**▼ TASK**

Name: Complete the work

Status: Started

**▼ ASSIGNEE**

Assign

ed ed Default Group:...

**Admin** Filter

**FILTERS**

Filter by Property

Group Member (159)

Resource Pool (561)

**▼ GROUP**

Filter

!#\$%\_+ -= [] {} / ? , ; (2)

1234567890123456789012

ADA Administrator (5)

ANY (21)

Administrators.MyOrg (3)

[More...](#)

**▼ ROLE**

Filter

ADA Site Admin (1)

ANY (8)

Audit Admin (5)

Change Specialist (1)

DBA (48)

[More...](#)

**RESULTS (720)**

Role: Report A...

**RA** Admin1, Rep...  
reportadmin1  
Group: Workfl...  
Role: Report A...

**RA** Admin1, Rep...   
reportadmin1  
Group: Workfl...  
Role: Report A...

**AA** Admin1, Adm...  
admin1  
Group: dba  
Role: dba

**RA** Admin2, Rep...  
reportadmin2  
Group: Workfl...  
Role: Report A...

**RA** Admin2, Rep...  
reportadmin2  
Group: Workfl...  
Role: Report A...

Administrato...  
Template Librar...

Administrato...

**AP** Amy Product...  
amy\_pme\_admin  
Group: Market...  
Role: Product ...

Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

For a **Review** task, drag and drop a group member or resource pool to the highlighted **Required** icon.

The screenshot displays the 'Task Assignments' window. On the left, the 'TASK' section shows 'Review the work'. Below it are sections for 'ASSIGNMENTS', 'ASSIGNER', 'REVIEWERS', and 'ADDITIONAL REVIEWERS'. The 'REVIEWERS' section shows two required roles: '1 Required GroupA/RoleA RA' and '2 Required Engineering/De...'. A red arrow points from the '1 Required' role to a profile icon in the 'REVIEWERS' list. The 'FILTERS' section includes a search bar, a 'Filter by Property' dropdown, and checkboxes for 'TYPE' (Group Member (26), Resource Pool (1)) and 'GROUP' (RoleA (27)). The 'RESULTS (27)' section lists users like 'adsuser\_12' through 'adsuser\_17', each with a profile icon and details like 'Group: Gr...' and 'Role: RoleA'. A red arrow points from the 'adsuser\_16' profile icon in the results list to the '1 Required' role in the reviewers list.

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

**Task Assignments** [Close]

**▼ TASK**  
 Name: Review the work  
 Status: Pending

**▼ ASSIGNER**  
 ed  
 ed  
 Default Group: demo

**▼ REVIEWERS**  
 RA Admin1, Report reportadmin1  
 Group: Workflow General...  
 Role: Report Admin  
 1 Required GroupA/RoleA  
 2 Required Engineering/Designer

**▼ ADDITIONAL REVIEWERS**


**FILTERS**  
 Filter by Property

**▼ TYPE**  
 Group Member (1)  
 Resource Pool (5)

**▼ GROUP**  
 Filter [X]  
 12345678901234  
 ADA Administra...  
 ANY (21)  
 Administrators.M...  
[More...](#)


**▼ ROLE**  
 Filter

**RESULTS (720)**  
 RA Admin1, Report reportadmin1  
 Group: Workflow Administr...  
 Role: Report Admin  
 RA Admin1, Report reportadmin1  
 Group: Workflow General...  
 Role: Report Admin  
 AA Admin1.Administrator admin1  
 Group: dba  
 Role: dba  
 RA Admin2, Report reportadmin2  
 Group: Workflow Administr...  
 Role: Report Admin  
 RA Admin2, Report reportadmin2  
 Group: Workflow General...  
 Role: Report Admin  
 Administrators.MyOrg  
 Template Library Administra...

Or, select a group member or resource pool, and then click **Assign**  under the specific section. Click **Remove** to remove a group member or resource pool from an assignment.

- Click **Modify**.

The task table reflects the assignment changes.

- Click **Save Edit**  above the table to save your edits.

## Select a signoff team

A signoff team consists of members or groups responsible for reviewing and signing off on target objects. This team ensures that all members agree the task is complete and meets the required standards before proceeding.

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** or on the **Workflow** tab of the object.

You can choose individual users or a resource pool for a select-signoff team task. A *resource pool* allows for open-ended assignments, permitting any user to accept responsibility for a task that is assigned to a group, role, or a role in a group.

You can also specify quorum requirements in a signoff team by selecting the minimum participation required for a Review task to proceed.

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**.

The screenshot shows the 'Submit to Workflow' interface with the 'Assignments' tab selected. On the left, there is a table with columns for 'Task', 'Assignee', and 'Origin'. The table lists tasks such as 'Complete the work', 'Acknowledge the work', and 'Review the work'. Below the table is an 'ASSIGNEE' section. On the right, there is a search bar 'Find in this content' and a 'FILTERS' section with options for 'TYPE' (Group Member (159), Resource Pool (561)) and 'GROUP'. A 'RESULTS (720)' section displays a list of potential assignees, including 'Marketing.MyOrg Product Marktng Eng...', 'Military Aircraft3 Project Administrator', 'Military Aircraft3 Project Team Admini...', 'NX Project 6 Project Administrator', 'NX Project 6 Project Team Admini...', and 'P101 Project Administrator'. A 'Submit' button is located at the bottom right.

The panel changes to display assignees and reviewers that you can assign to a task. 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.

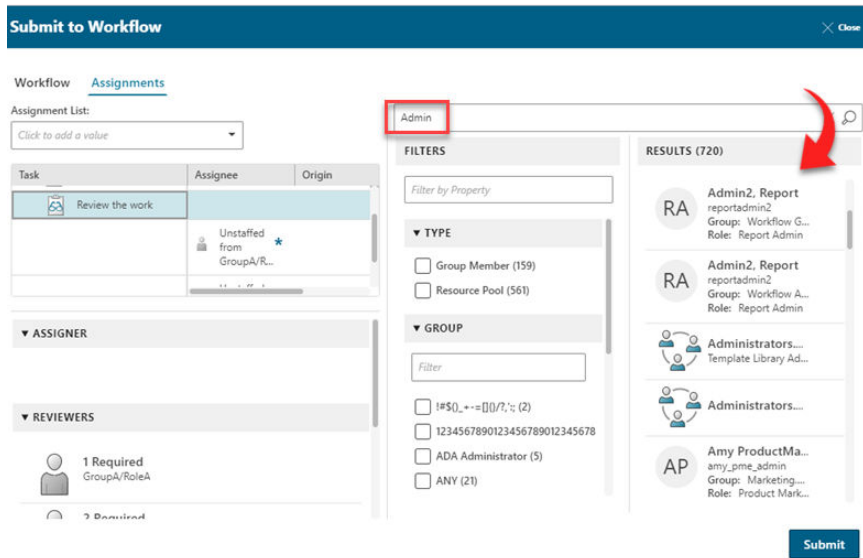
**Note:**

You can increase the size of the panel by dragging the left side of the panel to the left. Click **Reset**  to reset the panel to its default location and size.

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. Filters are available in the middle panel.
  - a. Use the top-most search box to search for a single group member or group/role. For example, entering **Admin** returns all the available group members and resource pools containing that specific string.



Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).

Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- b. Filters are defaulted to **Type**, **Group**, or **Role**. If the target is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.

**Filters**

Filter by Property

▼ **Type**

Group Member (19627)

Resource Pool (1584)

▼ **Group**

Filter

4G Tester (683)

4G Tester 2 (59)

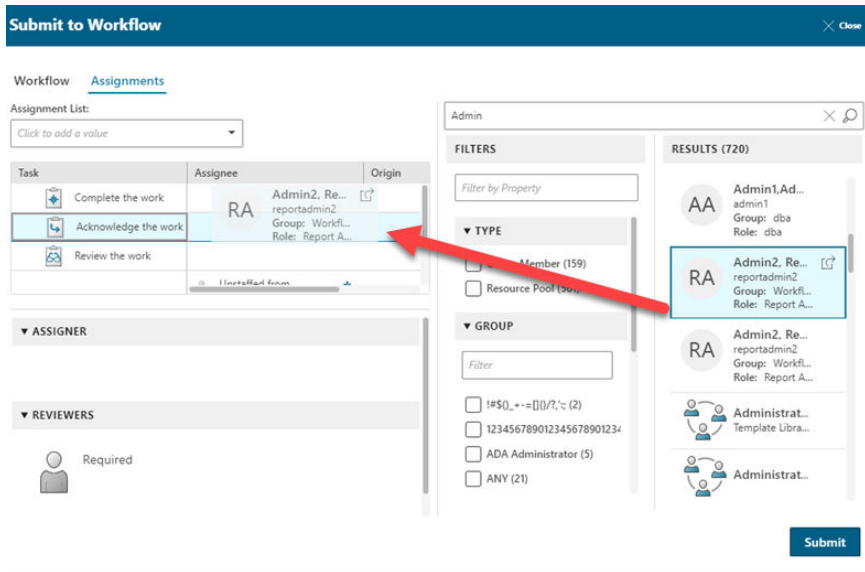
ACE Technologies (3)

ACE Technologies.External (3)

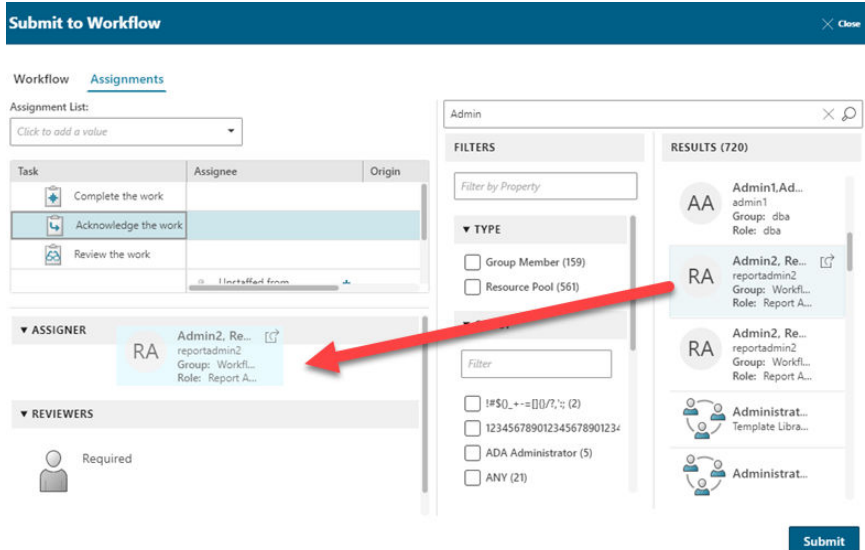
ACE\_AllParaDesign\_Group (6)


[More...](#)

- c. Under **Type**, specify either a **Group Member** or a **Resource Pool**.
  - d. Specify group members for the task by **Group** or **Role**, as necessary. Enter a name in the specific search box to filter.
4. Once any filters have been applied, results display on the right-side of the panel. Select a group member or resource pool for the task from the results and drag it to the **Assignee** column of the task table to populate the assignee.



You can also drag and drop a group member or resource pool from the results to the **Assigner** section.



Additionally, you can select a group member or resource pool from the results, and then click **Assign** .

**Submit to Workflow** Close

Workflow Assignments

Assignment List:  
Click to add a value

Task	Assignee	Origin
Complete the work		
Acknowledge the work		
Review the work		

▼ **ASSIGNER**

**Assign**

▼ **REVIEWERS**

Assign

**Admin** Close

**FILTERS**

Filter by Property

▼ **TYPE**

Group Member (159)

Resource Pool (561)

▼ **GROUP**

Filter

!#\$\_,+-=[]{}|/?:; (2)

123456789012345678901234

ADA Administrator (5)

ANY (21)

**RESULTS (720)**

AA Admin1,Ad...  
admin1  
Group: dba  
Role: dba

RA Admin2, Re...  
reportadmin2  
Group: Workfl...  
Role: Report A...

RA Admin2, Re...  
reportadmin2  
Group: Workfl...  
Role: Report A...

Administrat...  
Template Libra...

Administrat...

**Submit**

Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

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

For example, in this workflow, two users from the **Engineering/Designer** group/role are required as a reviewer.

**Submit to Workflow** Close

Workflow Assignments

Assignment List:  
Click to add a value

Task	Assignee	Origin
Acknowledge the work		
Review the work	Unstaffed from GroupA/RoleA/1	

▼ **REVIEWERS**

RA Admin2, Re...  
reportadmin2  
Group: Workfl...  
Role: Report A...

1 Required GroupA/RoleA

2 Required Engineering/Designer

**Admin** Close

**FILTERS**

Filter by Property

▼ **TYPE**

Group Member (159)

Resource Pool (561)

▼ **GROUP**

Filter

!#\$\_,+-=[]{}|/?:; (2)

123456789012345678901234

ADA Administrator (5)

ANY (21)

**RESULTS (720)**

AA Admin1,Ad...  
admin1  
Group: dba  
Role: dba

RA Admin2, Re...  
reportadmin2  
Group: Workfl...  
Role: Report A...

RA Admin2, Re...  
reportadmin2  
Group: Workfl...  
Role: Report A...

Administrat...  
Template Libra...


Administrat...

**Submit**



Or, select a group member or resource pool from the results, click the profile name icon so it is highlighted, and then click **Assign**. Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

5. Click **Submit** 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.

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

50

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** by your administrator 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** by your administrator 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**.

### Add signoff team members via the target object

1. Open the target object included in the workflow.
2. Click the **Workflow** tab.
3. You can add or remove members of the signoff team by clicking **Add** ⊕ or **Remove** ⊖.
4. Expand the panel and type a name or title to filter the list. 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.


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


7. (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** by your administrator 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** by your administrator 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.

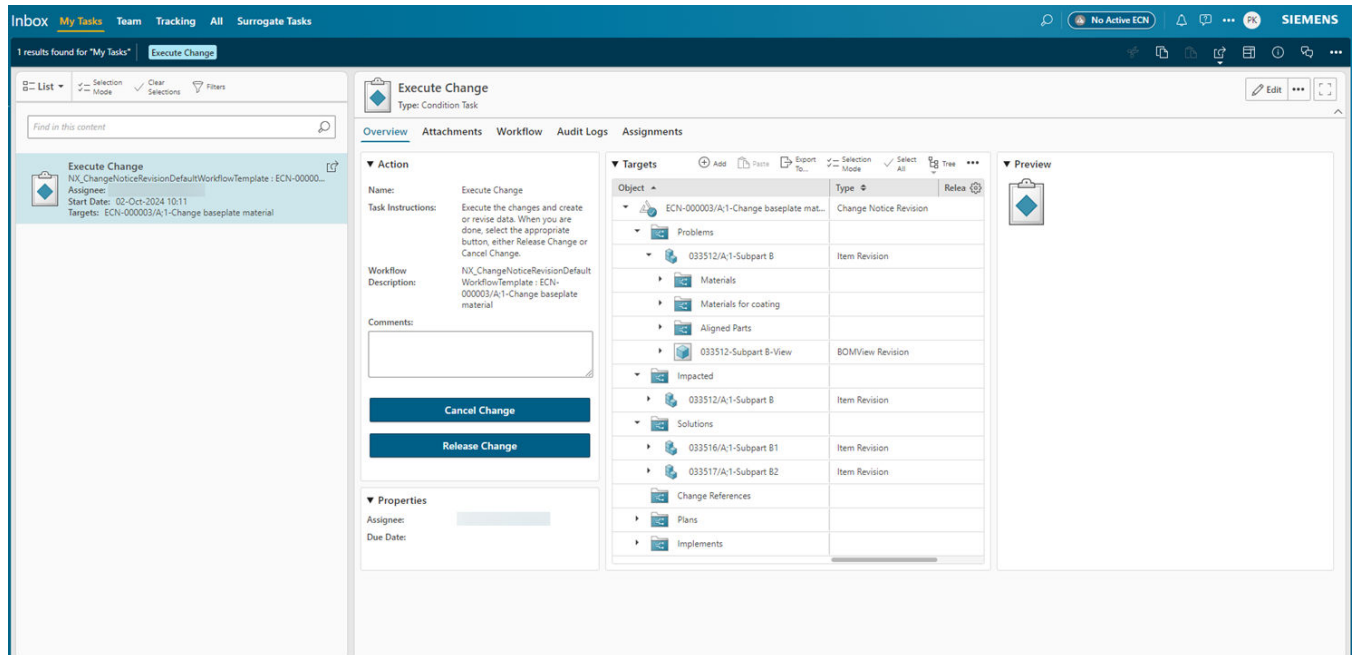
8. Click **Complete**.

# 3. Working with tasks

## Edit tasks within the Inbox

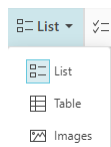
### Inbox

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



The **Inbox** view shown above is **List** and **select-signoff-team** 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. Administrators can set this preference to **false** to keep the first task from being preselected.

<b>Inbox header tabs</b>	<b>My Tasks</b>	Displays all tasks assigned to you.
	<b>Team</b>	Displays all tasks assigned to the resource pools you belong to.
	<b>Tracking</b>	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.
	<b>All</b>	Displays all tasks assigned to both you and any resource pools you belong to.
	<b>Surrogate Tasks</b>	Displays tasks assigned to users that have assigned you as their surrogate.
	<b>Remote Inboxes</b>	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.

▼ **Action**

**Name:** perform-signoffs

**Task Instructions:** Signoff team perform their signoffs.

**Decision:** No Decision

**Comments:**

Reject

Approve

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.

## Search the Inbox

An entered search string returns a Workflow task (EPMTask) in the user's Inbox that has a target object that matches the specified search criteria. The entered string is searched across Workspace objects using the Solr platform.

Searchable criteria includes anything that can be indexed on a Workspace object. For example:

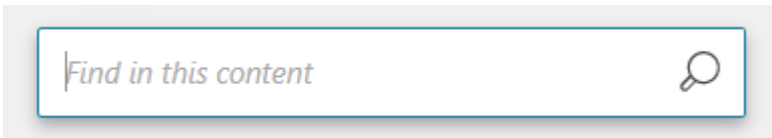
- Target object name
- Target object description
- Target object ID
- User identifier (last name, first name or User ID)
- Synopsis (for a change object)

**Note:**

This search functionality does not search EPMTask by its property (for example, task name and task type) and only returns a task in a user's Inbox when a target object(s) matches the provided criteria.

## Procedure

1. To perform a quick search, type your search criteria in the search text box.



You can use \* as a wildcard character.

Note:

See the guide [Data Indexing and Search Configuration](#) for details about search and indexing.

2. Press **Enter** or click .

The Inbox shows a list of tasks that match the specified criteria.

#### Inbox filtering

The Inbox search **Filters** panel displays properties and values related to tasks in the Inbox. Users can choose filter categories and values to narrow their results. Administrators can configure the behavior of filters to make it easier for users to find and apply filters (see [Setting up filtering in the Inbox](#) for more information).

Filters provide access to a wide range of predefined search criteria for tasks, including:

- Priority
- Assignee
- Initiator
- Due Date
- Type
- Late

You can filter tasks before or after entering search criteria in the search text box. Click the filters you want to use, and the Inbox displays the matching tasks.

Click **Clear** at the top of the Filters panel to deselect the filters.

#### 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>	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.  You can also reassign tasks if you have the correct permissions.
<b>Assigned to a team to which you are a member</b>	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> ).  All users belonging to the team see the tasks in the <b>Team</b> tab of the inbox.
<b>Made a surrogate of another user's tasks</b>	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> .  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.
<b>Forwarded for a specified period of time</b>	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.

## Reauthentication when completing a task

To enhance security and meet any regulatory requirements, administrators can enable user reauthentication before task completion in TCCS with SSO environments. When enabled, users are required to reenter their passwords before completing a task, adding an extra layer of protection against unauthorized access and security breaches.

Use the EPM-require-authentication handler to implement task reauthentication.


## 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.

## View current and completed tasks

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

Task	Status	Performer	Assignee Origin	Signoff Profile	Due Date	End Date
Review the work : Select Team	Started	ed (ed)				
Complete the work	Completed	ed (ed)				09-Oct-2024

You can edit the **Due Date** and **Comments** fields in the task table by clicking **Edit** .

Click **Save**  to save or **Cancel**  to remove your changes.

### 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.

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.

Task	Status	Assignee	Assignee Origin	Signoff Profile	Decision	Required
Simple Do 2	Pending	Tessa Techwriter (tessa.techwriter)				

The table displays the **Task** name, **Status**, **Assignee** name, **Assignee Origin** (if the user is from a resource pool, PAL, or is a dynamic participant), the **Signoff Profile** if one was determined in the Workflow Designer, if a **Decision** was made, and if the task is required.

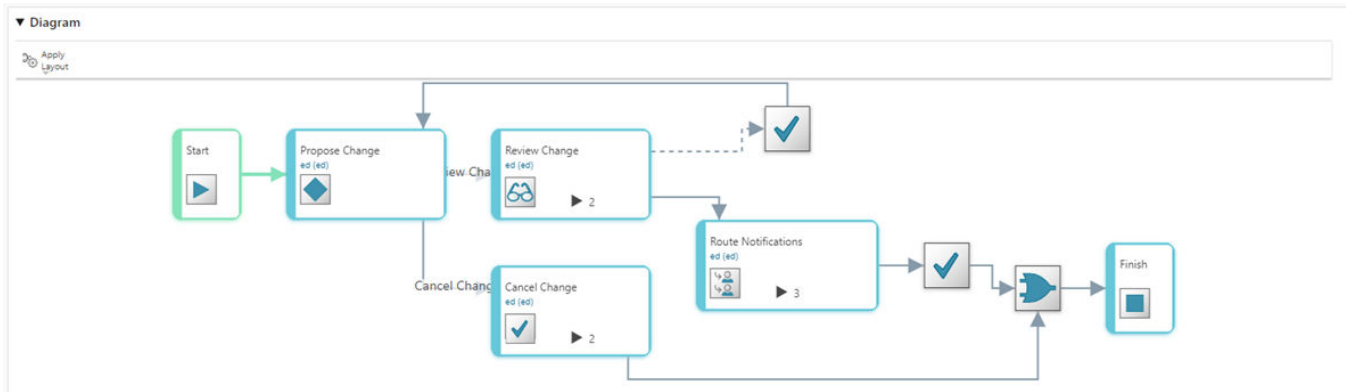
#### Note:

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.

### View tasks in the graphical view

Expand the **Diagram** section to see the 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.

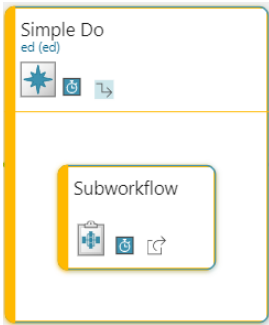
The default auto-layout options display the task node locations as determined by the automatic positioning. This includes:

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

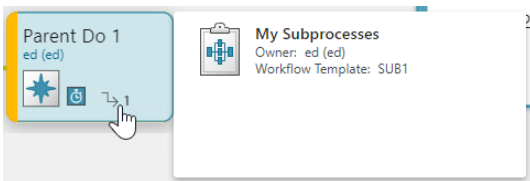
Fixed layout displays the task (and subtask) node size and the location as they were last saved in the rich client or in Active Workspace. This also lets you view legacy template layouts as they were originally designed in the rich client.

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:

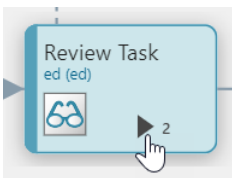


A subworkflow in the fixed layout is as follows:

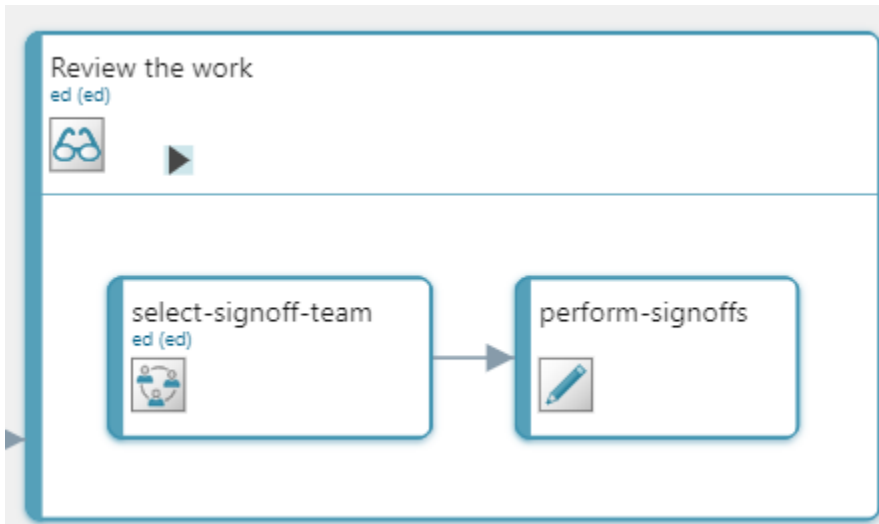


When you select a task assigned to you, the initial workflow view focuses on the previous, current, and next tasks. Tasks with multiple action items, such as selecting a signoff team and performing signoffs, are minimized and indicated by an arrow.

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:

Your administrator 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:

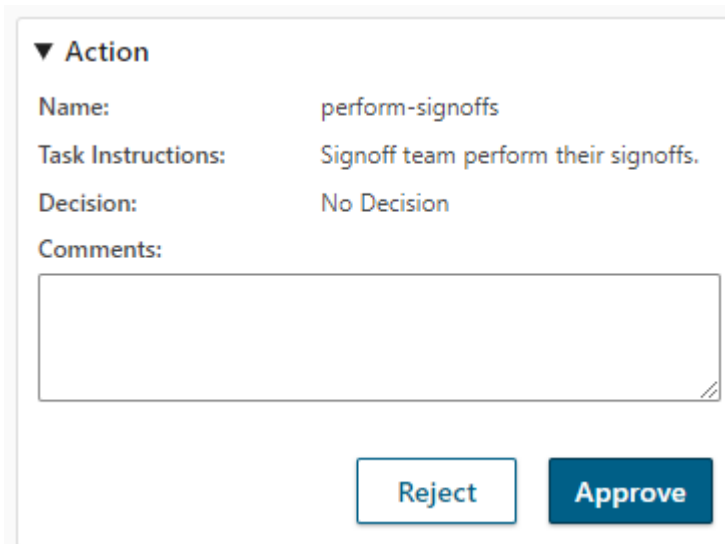
You can add comments without signing off on the task. For example, you add notes or details about the review.

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.



▼ **Action**

**Name:** perform-signoffs

**Task Instructions:** Signoff team perform their signoffs.

**Decision:** No Decision


**Comments:**

**Reject** **Approve**

- 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 go to **More Commands ... > 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 Workflow Designer on Active Workspace.
- 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:

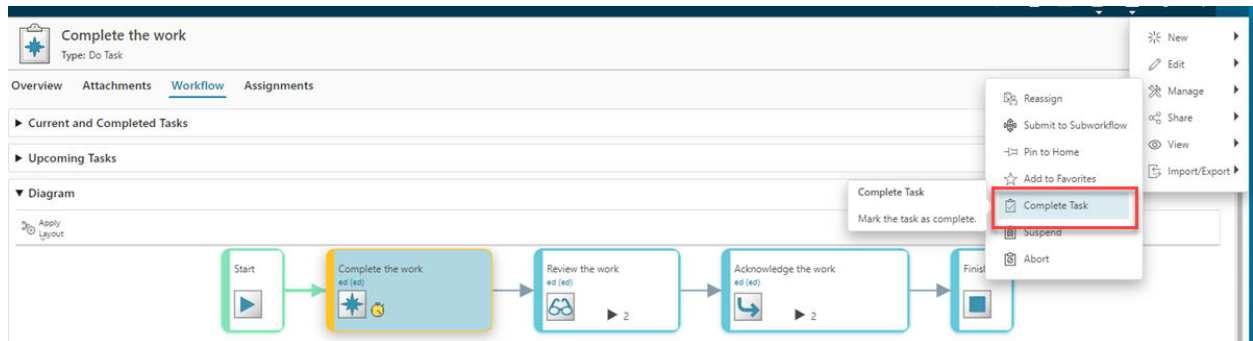
- In the **Overview** tab, click the embedded task action in the **Actions** section. Review any task instructions and process description. If necessary, type additional information into the **Comments** box, then click **Complete**.

The screenshot shows a form titled 'Action' for the task 'Complete the work'. It includes the following fields:

- Name:** Complete the work
- Task Instructions:** Do the work as instructed in email
- Comments:** A large empty text area for entering comments.
- Complete:** A blue button at the bottom right of the form.

- In the **Workflow** tab, select the task in the **Current and Completed Tasks** table, and go to **More Commands** **...** > **Manage** > **Complete Task** on the primary toolbar.

You can also select the task in the graphical area, and go to **More Commands** **...** > **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 **Explorer**, **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, then go to **More Commands**  > **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 **Current and Completed Tasks** table, and then go to **More Commands ... > Manage**  **> Complete Task** on the primary toolbar.


Or, select the task in the graphical area, and go to **More Commands ... > 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 **Explorer**, **Changes**, or through a search).
2. Click the **Workflow** tab, then click **Complete** in the **Tasks to Perform** section.

Alternatively, in the **Overview** tab, and then go to **More Commands ... > Manage**  **> Complete Task** on the primary toolbar.

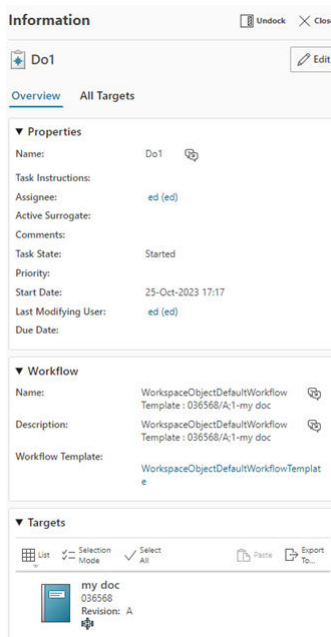
For change objects, you can also click **Complete** in the **Overview** tab's **Task to Perform** section.

### 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**.

- To view or edit the priority, click ⓘ on the page level toolbar to open the **Information** panel and click **Edit**.



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

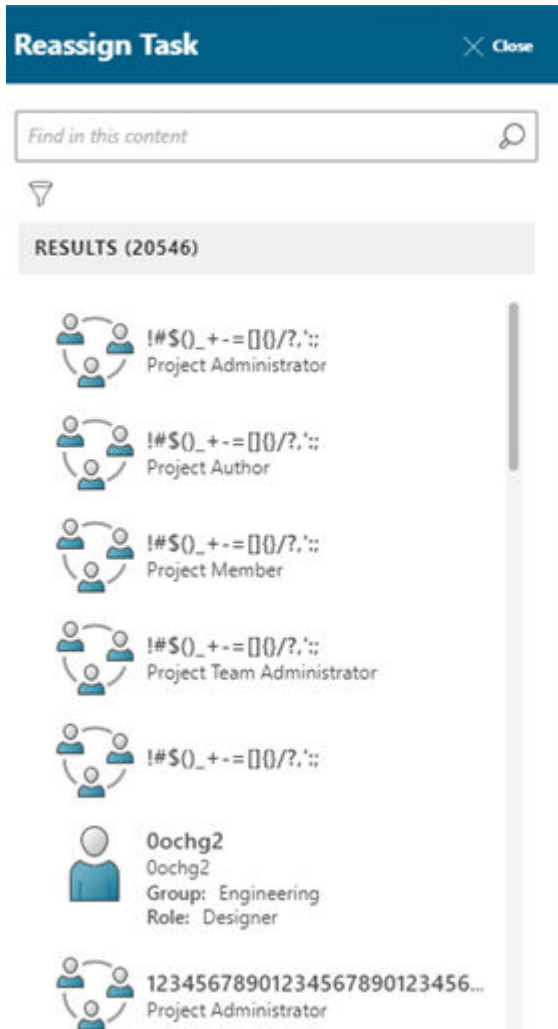
Reassigning a task moves it from the original inbox to the inbox of the recipient.

## Reassign a task assigned to you

- Click the **Inbox** tile on the home page.
- Click the **My Tasks** tab, if not displayed.
- Select the task that you want to reassign.

- Go to **More Commands** **...** > **Manage**  > **Reassign** on the primary toolbar.
- In the **Reassign Task** dialog box, type the name of the user to whom you want to reassign your tasks and press **Enter** or click **Search**  to see results. You can enter a partial name or wildcard characters.

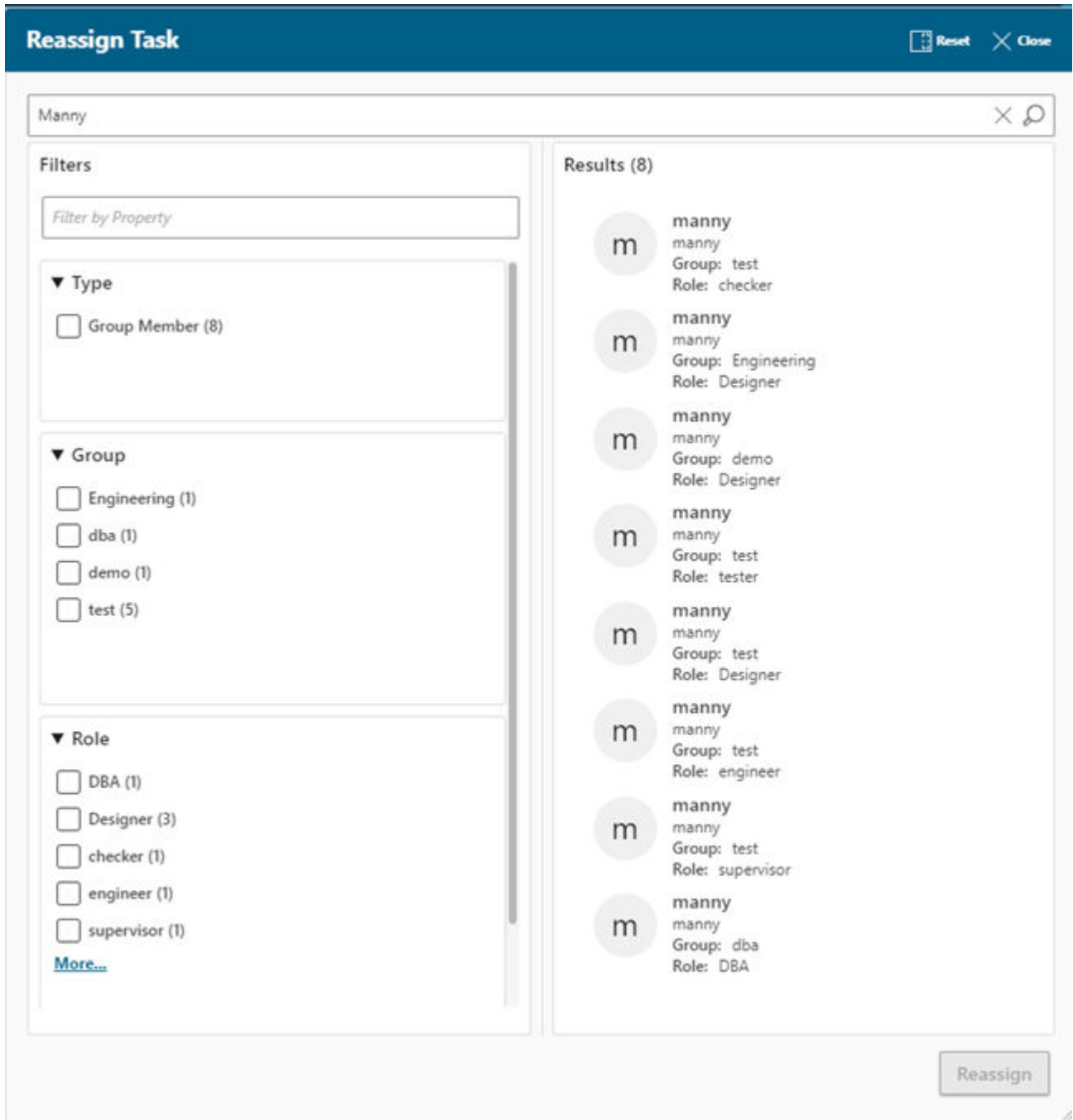
Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).



- For additional search filters, click the **Filter** icon .

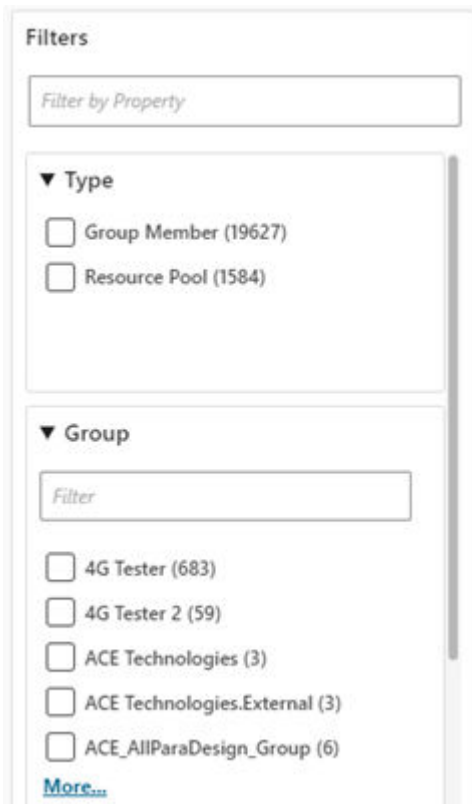
You can also display the filters and increase the size of the **Reassign Task** dialog box by dragging the left side of the panel to the left.

Results now display on the right.



Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.




- Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.



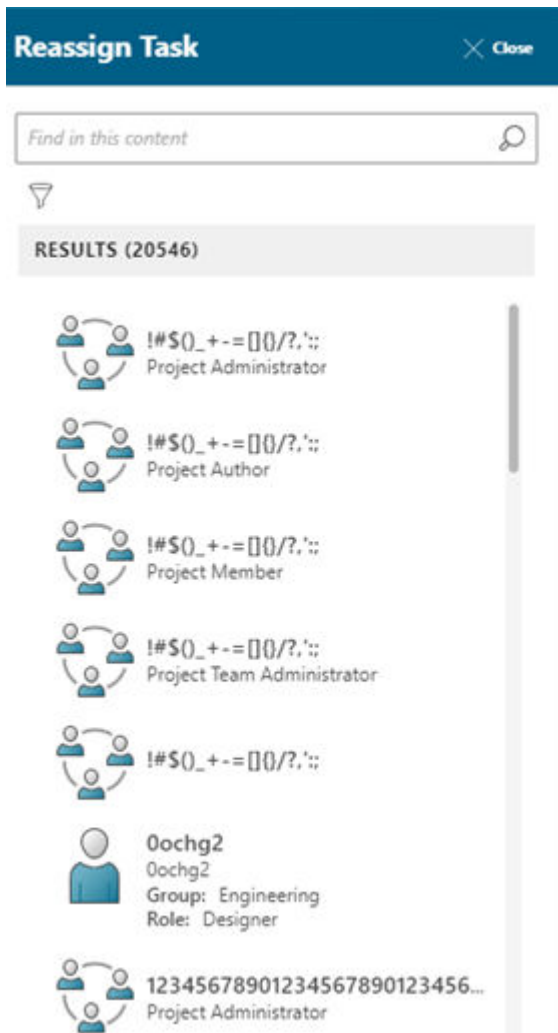
You can also search within each property.

8. Make your selection, 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. Go to **More Commands ...** > **Manage**  > **Reassign**  on the primary toolbar.
5. In the **Reassign Task** dialog box, type the name of the user to whom you want to reassign the tasks and press **Enter** or click **Search**  to see results. You can enter a partial name or wildcard characters.

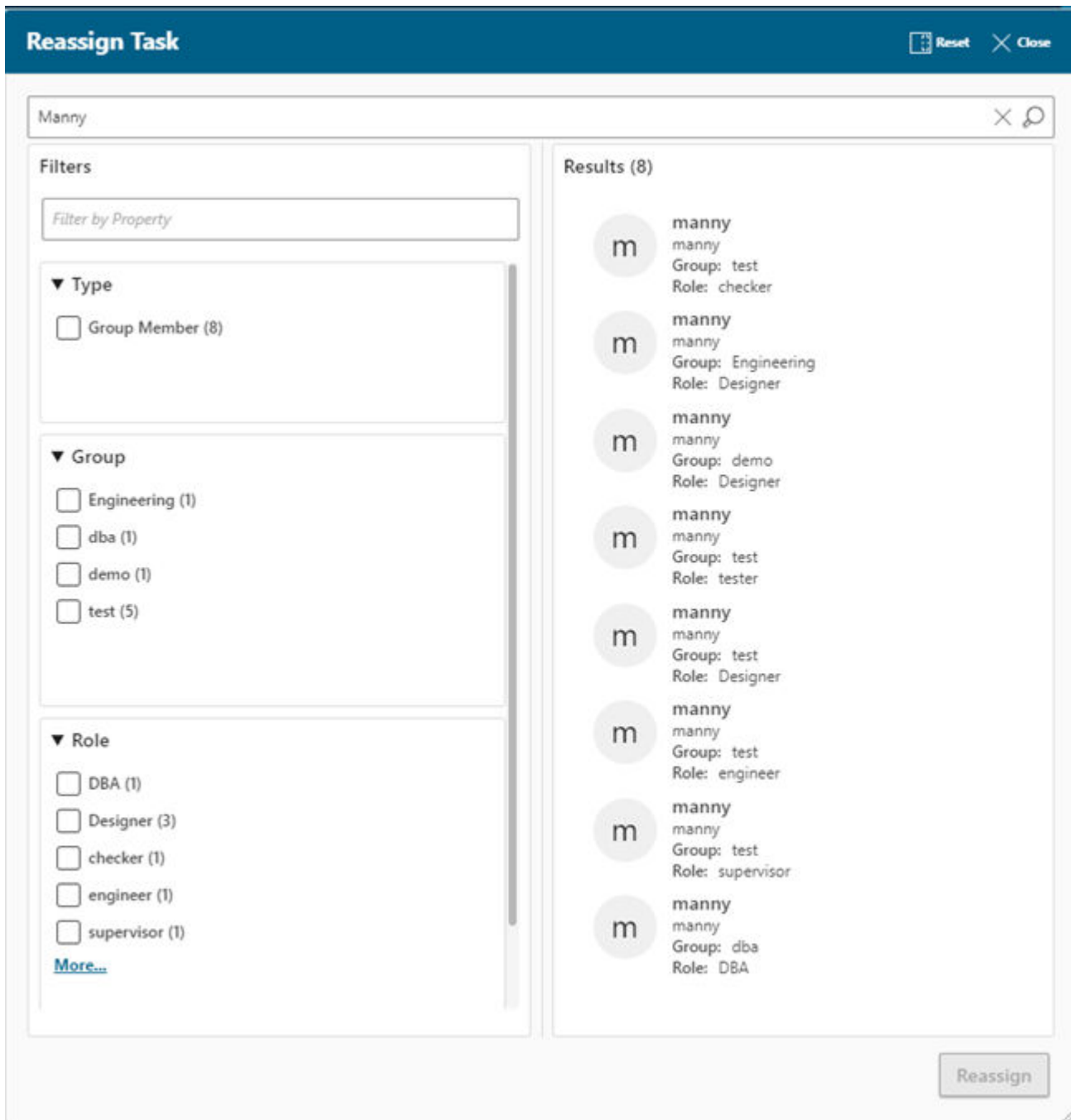
Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).



6. For additional search filters, click the **Filter** icon .

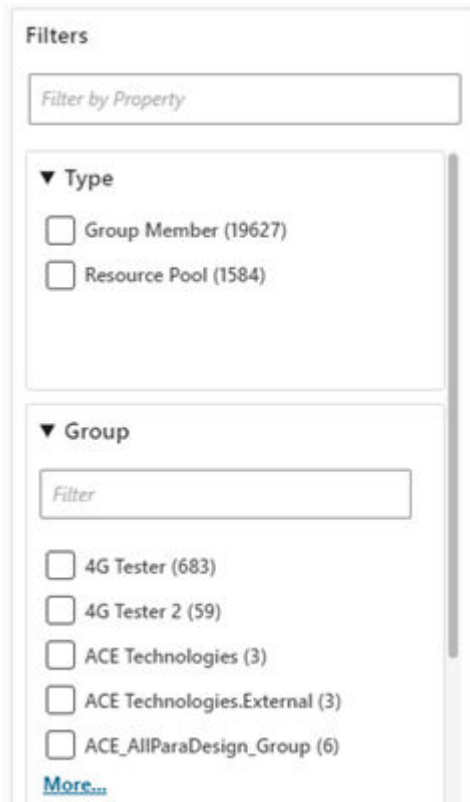
You can also display the filters and increase the size of the **Reassign Task** dialog box by dragging the left side of the panel to the left.

Results now display on the right.



Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.






- Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.



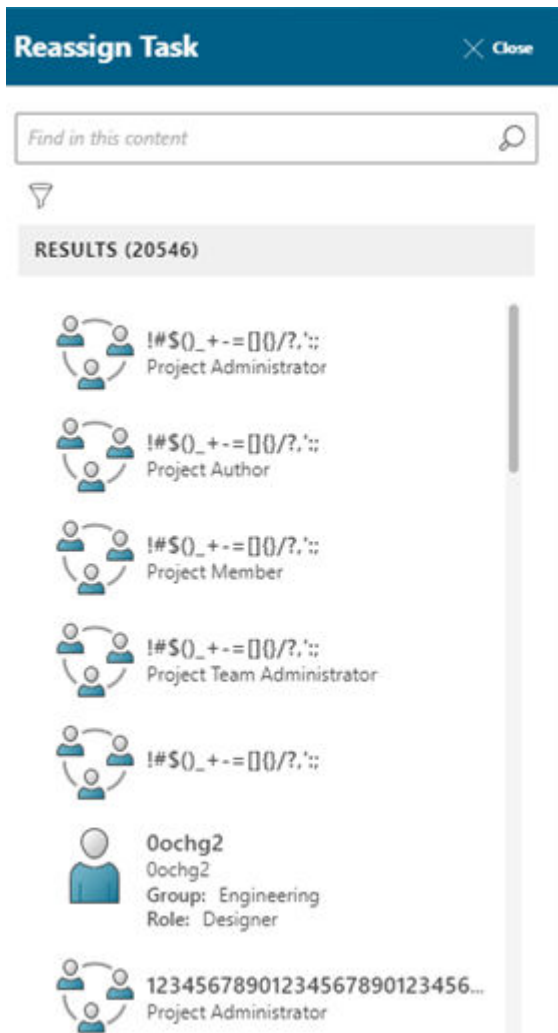
You can also search within each property.

8. Make your selection, 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. From the page level toolbar in the user's profile page, click **Open**  > **Open Inbox** .
3. Click the **My Tasks** tab, if not displayed.
4. Select a task and go to **More Commands**  > **Manage**  > **Reassign** on the primary toolbar.
5. In the **Reassign Task** dialog box, type the name of the user to whom you want to reassign the tasks and press **Enter** or click **Search**  to see results. You can enter a partial name or wildcard characters.

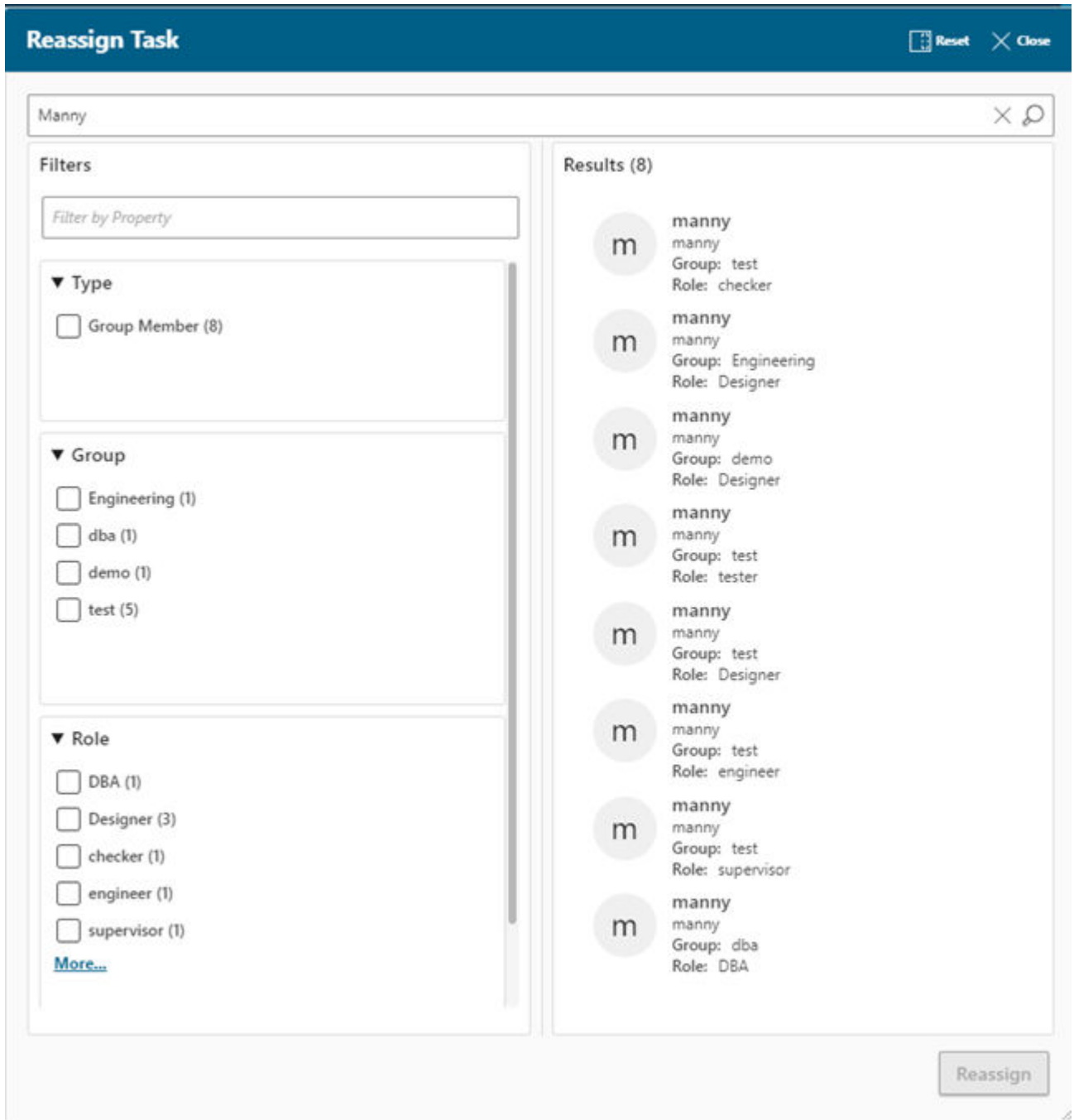
Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).



6. For additional search filters, click the **Filter** icon .

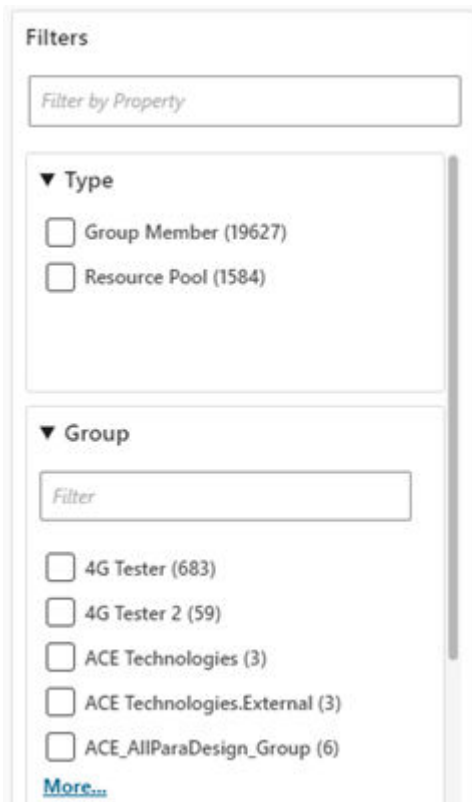
You can also display the filters and increase the size of the **Reassign Task** dialog box by dragging the left side of the panel to the left.

Results now display on the right.



Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.






You can also search within each property.

8. Make your selection, enter any comments, and click **Reassign**.

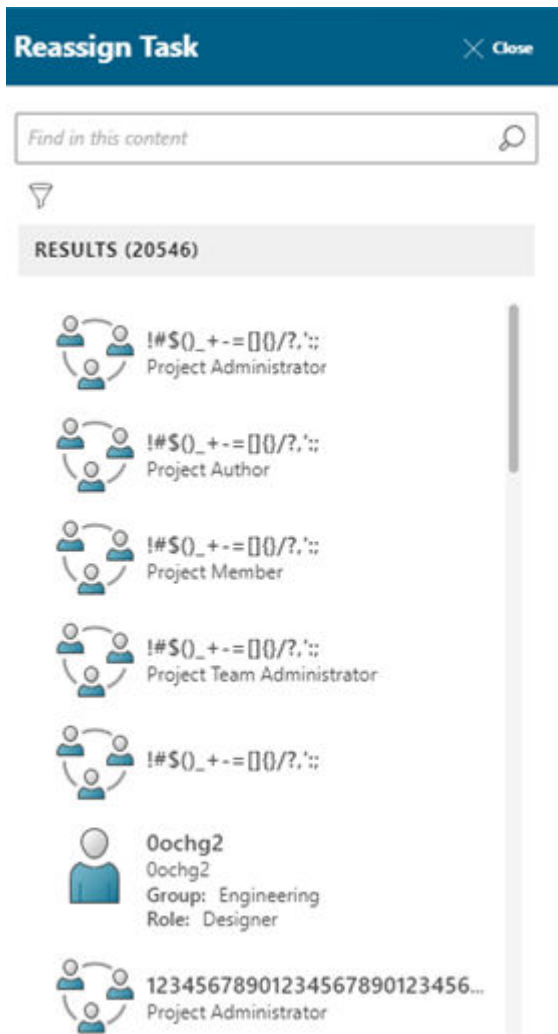
### Reassign multiple tasks to another user

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 (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. Go to **More Commands** **...** > **Manage**  > **Reassign** on the primary toolbar.
5. In the **Reassign Task** dialog box, type the name of the user to whom you want to reassign the tasks and press **Enter** or click **Search**  to see results. You can enter a partial name or wildcard characters.

Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).



6. For additional search filters, click the **Filter** icon .

You can also display the filters and increase the size of the **Reassign Task** dialog box by dragging the left side of the panel to the left.

Results now display on the right.

The screenshot shows the 'Reassign Task' dialog box. At the top, there is a search bar containing 'Manny' and buttons for 'Reset' and 'Close'. Below the search bar, the 'Filters' section is expanded to show three categories: 'Type', 'Group', and 'Role'. Each category has a list of options with checkboxes and counts. The 'Results (8)' section on the right displays a list of 8 results, each with a circular icon containing the letter 'm' and text indicating the user name, group, and role.

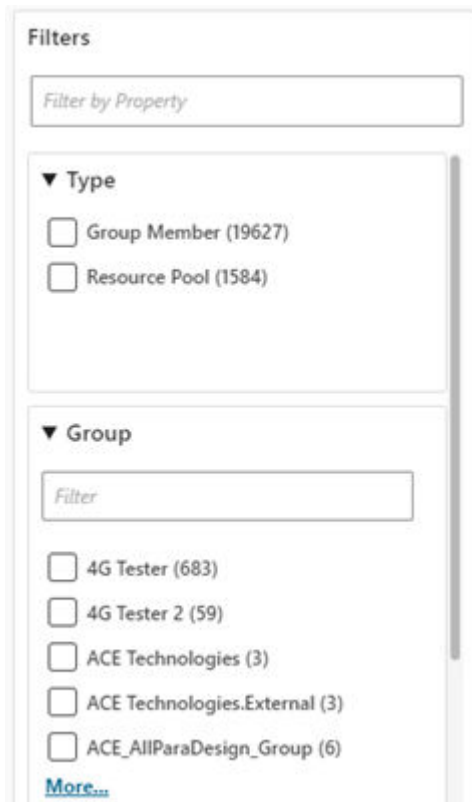
Filter Category	Filter Option	Count
Type	Group Member	8
Group	Engineering	1
	dba	1
	demo	1
	test	5
Role	DBA	1
	Designer	3
	checker	1
	engineer	1
	supervisor	1
	More...	

Result Index	User Name	Group	Role
1	manny	test	checker
2	manny	Engineering	Designer
3	manny	demo	Designer
4	manny	test	tester
5	manny	test	Designer
6	manny	test	engineer
7	manny	test	supervisor
8	manny	dba	DBA

Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.



You can also search within each property.

8. Make your selection, enter any comments, and click **Reassign**.
9. 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 your configuration, 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 go to **More Commands ... > 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.

## 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.

#### 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. 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 **Manage 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 (for example, from a participant or owner list).

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

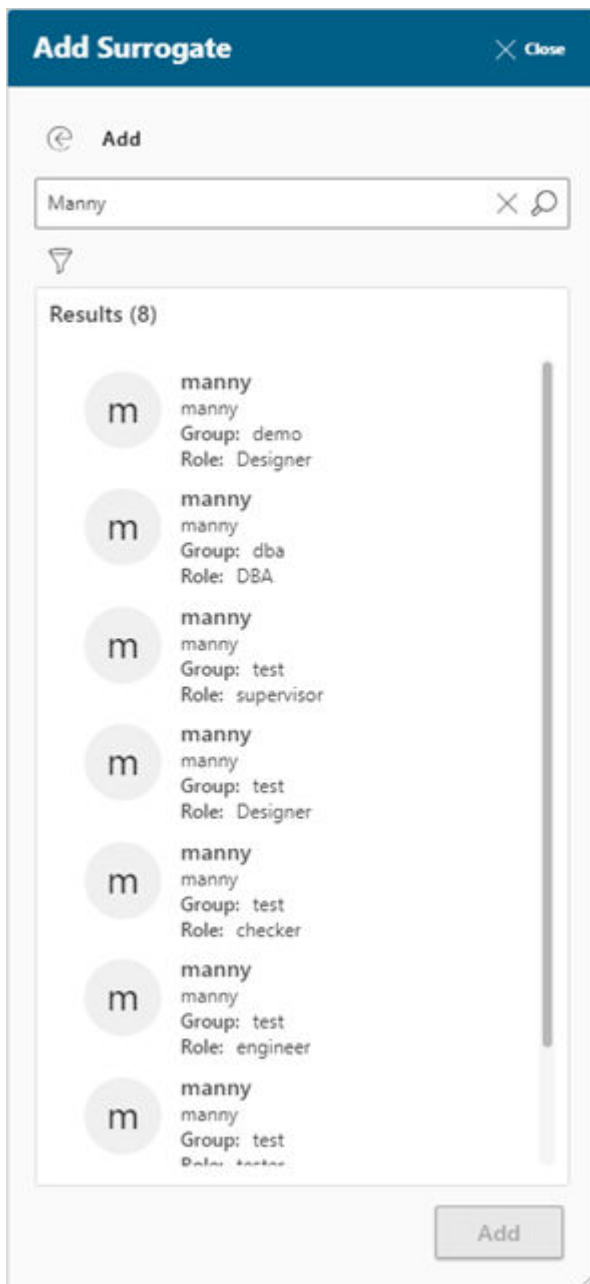
2. Click **Add Surrogate** .



3. In the **Add Surrogate** dialog box, you can optionally enter the date and time range for the surrogate responsibility to remain active.

4. Under **Surrogate**, click **Add** ⊕.
5. Type the name of the user to whom you want to delegate your tasks and press **Enter** or click **Search** 🔍 to see results. You can enter a partial name or wildcard characters.

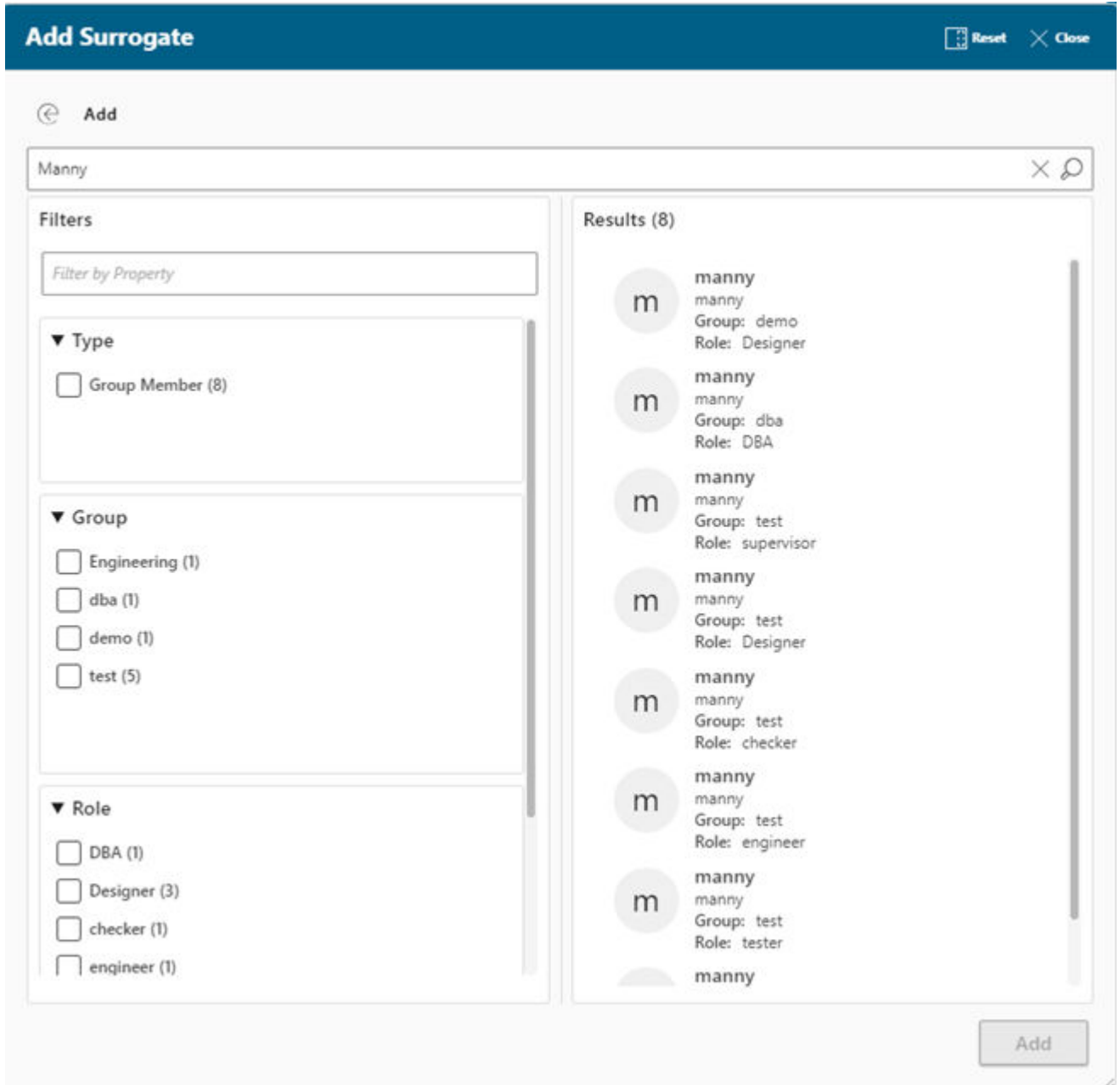
Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).



6. For additional search filters, click the **Filter** icon 🗑️.

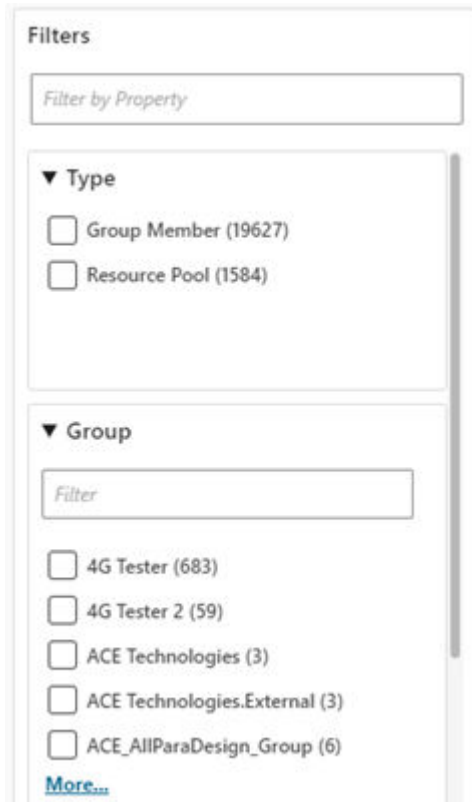
You can also display the filters and increase the size of the **Add Surrogate** dialog box by dragging the left side of the panel to the left.

Results now display on the right.



Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.



You can also search within each property.

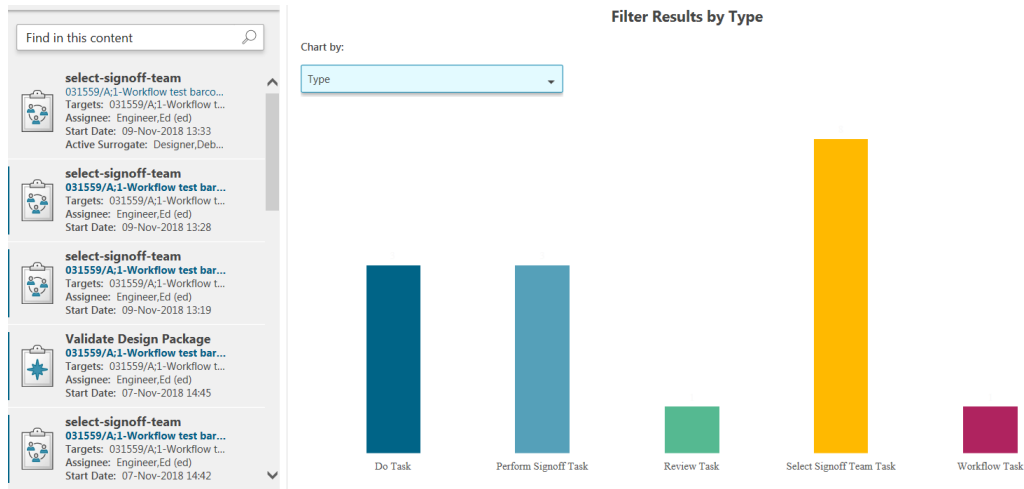
8. Select the user from the list and click **Add**.
9. Click **Add** to add the surrogate.




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. Go to **More Commands**  > **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 else (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. Go to **More Commands**  > **Edit**  > **Remove Surrogate**  on the primary toolbar.

The user is removed 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:

<b>Parent workflow templates</b>	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 <b>EPM-create-sub-process</b> handler (see <i>Start an ad hoc subworkflow</i> for details).
<b>My Worklist</b>	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 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.

This pseudo folder **Independent Sub-Workflows** displays subworkflows identified from the property **epm\_subprocesses**. Subworkflows are presented in no particular order, nor can their order be controlled.

Workflow subprocesses can be dependent or independent of parent processes, depending on the preference. Preferences are set by administrators.

#### 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.

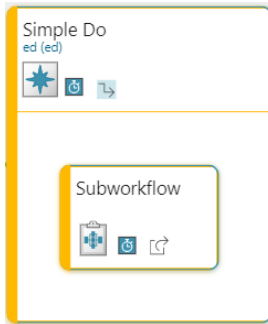
The **WRKFLW\_parent\_behavior\_on\_sub\_process\_abort** preference ensures the parent process's task proceeds after the dependent subprocess is aborted.

#### 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. Select a task, and then click the **Workflow** tab.
4. Scroll down to the graphical view area.

- 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:

- Click the **Inbox** tile of the home page.
- Click the **My Tasks** tab, if not already displayed.
- Select a task to submit to a subworkflow.
- There are multiple ways to submit a task to a subworkflow:
  - Select a task and from any tab in the **Inbox**, go to **More Commands ...** > **Manage** , **Submit to Subworkflow** .

- From the **Workflow** tab:

Select a task in the signoff or **Upcoming Tasks** table (click  to expand), and then go to **More Commands ...** > **Manage** , **Submit to Subworkflow** .

or

In the graphical area, select a task and go to **More Commands ...** > **Manage** , **Submit to Subworkflow** .

The **Submit to Subworkflow** panel displays.

You can increase the size of the panel by dragging the left side of the panel to the left.

- 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.

6. At this point, you can click **Submit** and the subworkflow is started. To make additional specifications to the subworkflow, continue with the procedure.
7. Accept the default subworkflow name or enter your own.

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

8. Enter a description for the new subworkflow.
9. Objects submitted to the subworkflow are displayed in the **Targets** section of the panel. To add an additional target object(s), click **Add** ⊕. Any type of object can be added to a subworkflow, as there are no template restrictions.

The **Add** panel displays. Any 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 keyword or an advanced search. Once an object(s) is selected, click **Add**.

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

10. Expand the **References** section. To add a reference, click **Add** ⊕. The **Add** panel displays, 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 keyword or an advanced search. Once a reference(s) is selected, click **Add**.

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

11. Click the **Assignments** tab if you want to assign group members (users) or resource pools to the subworkflow.

The panel changes to display assignees and reviewers that you can assign to a task. 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.

12. 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.

13. Filters are available in the middle panel.

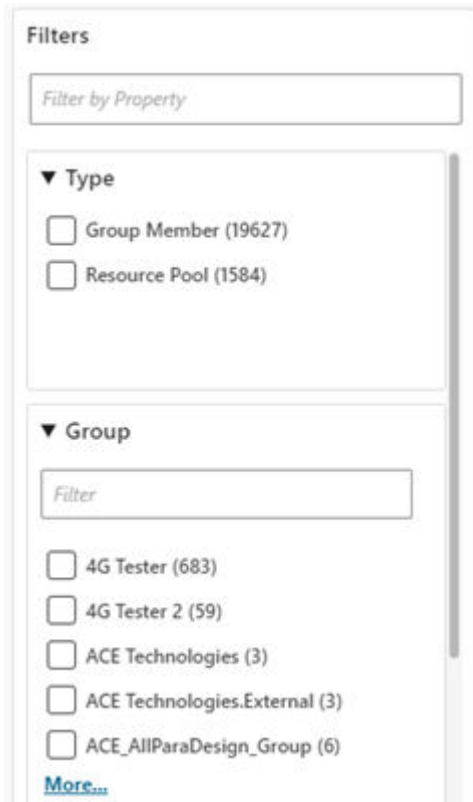
- a. Use the top-most search box to search for a single group member or group/role. For example, entering **Admin** returns all the available group members and resource pools containing that specific string.

The screenshot shows the 'Submit to Subworkflow' interface. At the top, there is a search box containing the text 'Admin'. Below the search box, the 'Filters' panel is visible, showing a 'Filter by Property' input field. The filters are categorized into 'Type', 'Group', and 'Role'. Under 'Type', 'Group Member (8)' is selected. Under 'Group', 'Engineering (1)', 'dba (1)', 'demo (1)', and 'test (5)' are listed. Under 'Role', 'DBA (1)', 'Designer (3)', 'checker (1)', 'engineer (1)', and 'supervisor (1)' are listed. To the right of the filters, the 'Results (8)' panel displays a list of search results, each with a circular icon containing the letter 'm' and text indicating the user's name, group, and role. A 'Submit' button is located at the bottom right of the interface.

Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).

Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- b. Filters are defaulted to **Type**, **Group**, or **Role**. If the target is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property.



- c. Under **Type**, specify either a **Group Member** or a **Resource Pool**.
  - d. Specify group members for the task by **Group** or **Role**, as necessary. Enter a name in the specific search box to filter.
14. Once any filters have been applied, results display on the right-side of the panel. Select a group member or resource pool for the task from the results and drag it to the **Assignee** column of the task table to populate the assignee.


The screenshot shows the 'Submit to Subworkflow' interface with the 'Assignments' tab selected. The 'Assignment List' table has the following data:

Task	Assignee
Complete the work	manny Group: test Role: Designer
Acknowledge the work	
Review the work	
	Unstaffed from GroupA...*
	Unstaffed from Enginee...*

The 'Results (8)' panel on the right shows a list of resources. A red arrow points from the resource pool entry 'manny, Group: test, Role: Designer' in the 'Results' panel to the 'Assignee' column in the 'Assignment List' table.

You can also drag and drop a group member or resource pool from the **Results** section.

The screenshot displays the 'Submit to Subworkflow' interface. At the top, there is a title bar with 'Submit to Subworkflow' and 'Reset' and 'Close' buttons. Below the title bar, the 'Workflow' section is active, showing 'Assignments'. The 'Assignment List' is currently empty, with a 'Click to add a value' dropdown. A table below lists tasks: 'Complete the work', 'Acknowledge the work', and 'Review the work'. The 'Assignee' column shows 'Unstaffed from GroupA...' and 'Unstaffed from Engine...'. Below the table, the 'Assignee' section shows a resource 'manny' with details: 'manny', 'Group: test', and 'Role: supervi...'. A red arrow points from the 'Results (8)' panel to this resource. The 'Results (8)' panel lists 8 resources, with the third one highlighted. The 'Filters' panel on the right shows filters for 'Type', 'Group', and 'Role'. The 'Type' filter is set to 'Group Member (8)'. The 'Group' filter is set to 'test (5)'. The 'Role' filter is set to 'supervisor (1)'. A 'Submit' button is located at the bottom right of the interface.

Additionally, you can select a group member or resource pool from the results, and then click **Assign** .

The screenshot displays the 'Submit to Subworkflow' interface. At the top, there is a blue header with the title 'Submit to Subworkflow' and buttons for 'Reset' and 'Close'. Below the header, the 'Workflow' section is active, showing 'Assignments'. An 'Assignment List' dropdown is set to 'Click to add a value'. A table lists tasks and their assignees:

Task	Assignee	Origin
Complete the work		
Acknowledge the work		
Review the work		
	Unstaffed from GroupA...*	
	Unstaffed from Enginee...*	

Below the table, an 'Assignee' section is visible with an 'Assign' button highlighted by a red box. To the right, a 'Filters' panel allows filtering by property, with sections for Type (Group Member (8)), Group (Engineering (1), dba (1), demo (1), test (5)), and Role (DBA (1), Designer (3), checker (1), engineer (1), supervisor (1)). A 'Results (8)' panel shows a list of users with their details, including name, group, and role. The fourth user, 'manny' (Group: test, Role: Designer), is highlighted. A 'Submit' button is located at the bottom right.

Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

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

For example, in this subworkflow, two users from the **Engineering/Designer** group/role are required as a reviewer.

**Submit to Subworkflow** [Reset] [Close]

Workflow Assignments

Assignment List:

Task	Assignee	Origin
Complete the work		
Acknowledge the work		
Review the work		
	Unstaffed from GroupA...*	
	Unstaffed from Enginee...*	

▼ Reviewers

1 Required GroupA/RoleA	manny manny Group: test Role: Designer	
2 Required Engineering/Designer		

▼ Filters

Filter by Property

▼ Type

Group Member (8)

▼ Group

Engineering (1)

dba (1)

demo (1)

▼ Role

DBA (1)

Designer (3)

checker (1)

engineer (1)

supervisor (1)

Results (8)

- manny  
manny  
Group: demo  
Role: Designer
- manny  
manny  
Group: dba  
Role: DBA
- manny  
manny  
Group: test  
Role: supervi...
- manny  
manny  
Group: test  
Role: Designer
- manny  
manny  
Group: test  
Role: checker
- manny  
manny  
Group: test  
Role: engineer
- manny  
manny  
Group: test  
Role: tester
- manny  
manny  
Group: test  
Role: test

**Submit**

Or, select a group member or resource pool from the results, click the profile name icon so it is highlighted, and then click **Assign** . Select a group member or resource pool to display the **Remove** button to remove them from an assignment.

15. Click **Submit**.


## Suspend a task

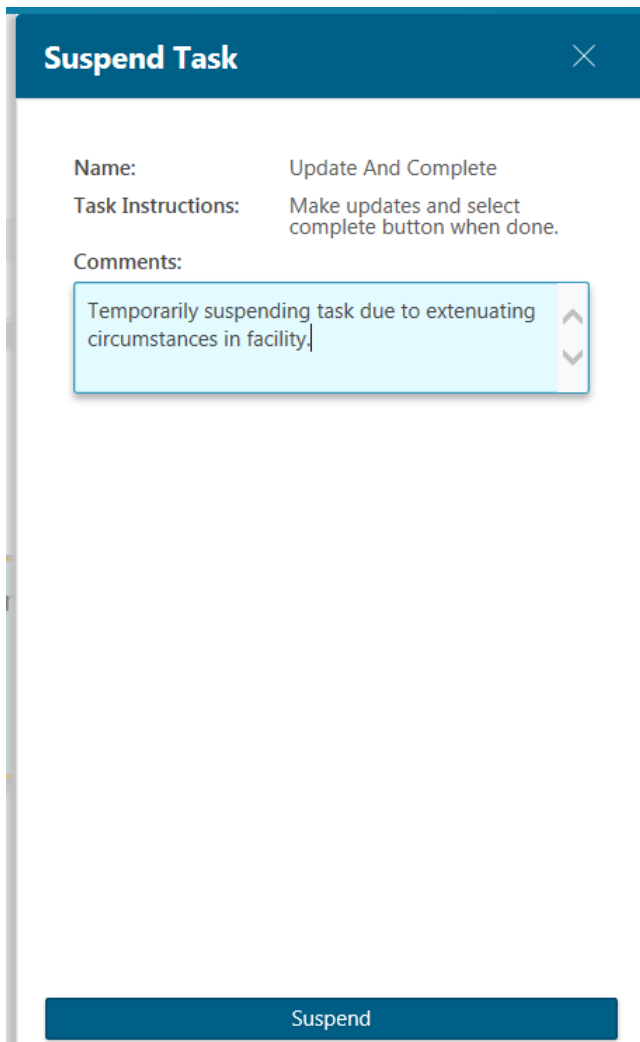
Tasks delaying completion may be suspended based on a user's needs. Suspended tasks can be resumed at any time. You may want to suspend a task due to unforeseen circumstances outside of the scope of the work or schedule.

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. Go to **More Commands** ... > **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**.



**Suspend Task** ×

**Name:** Update And Complete

**Task Instructions:** Make updates and select complete button when done.

**Comments:**

Temporarily suspending task due to extenuating circumstances in facility


Suspend

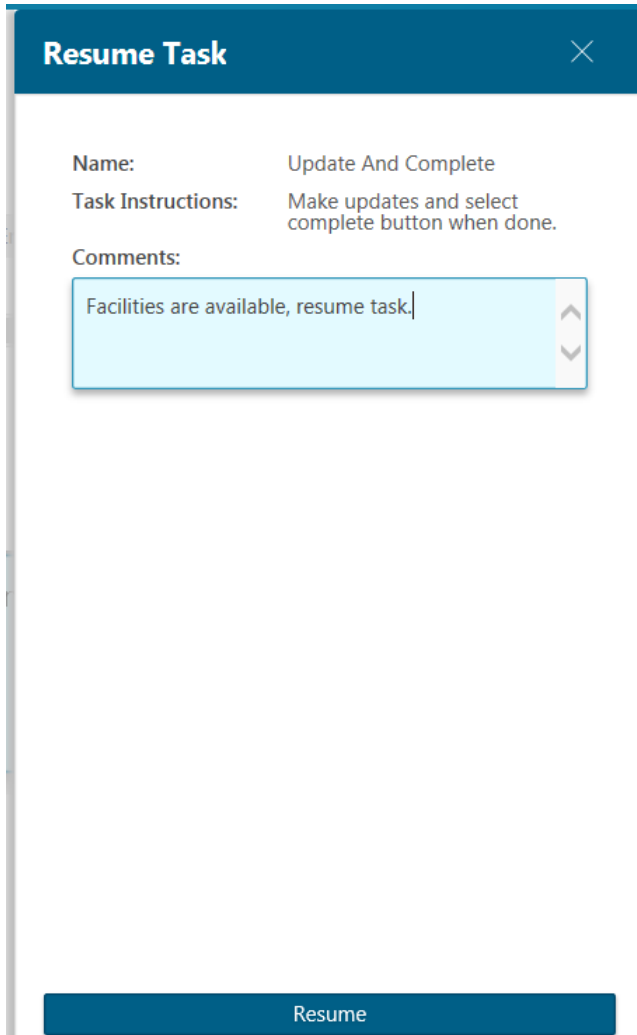
The comments are shown in the **Comments** column in the **Workflow** tab, and in the **Comments** section of the **Information** panel.

## 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 suspended task.

3. Go to **More Commands** **...** > **Manage**  > **Resume** on the primary toolbar.
4. Resuming a task requires comments explaining the resolution. Enter the appropriate details and click **Resume**.



**Resume Task** ×

**Name:** Update And Complete

**Task Instructions:** Make updates and select complete button when done.

**Comments:**

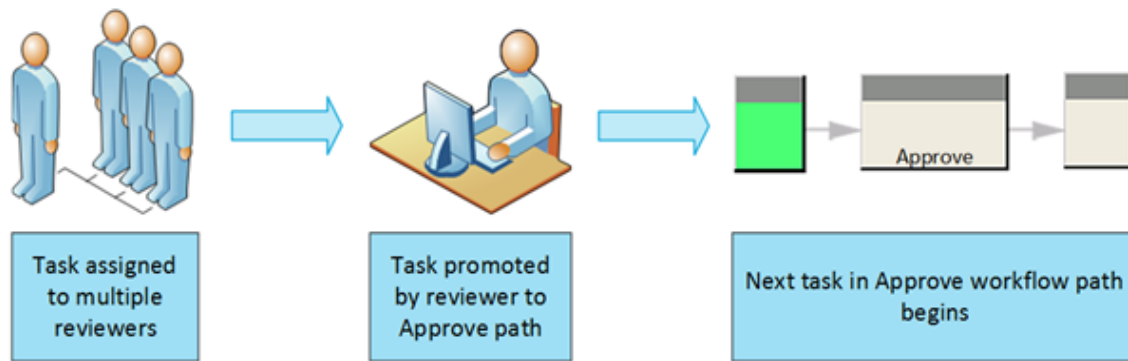
Facilities are available, resume task.

**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. Go to **More Commands** **...** > **Manage** > **Promote Task**.

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.

2 results found for "My Tasks" >

New Do Task 2		Overview	All Targets	Workflow
TASK	PERFORMER	COMMENTS		
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				
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)			

## 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. Go to **More Commands** **...** > **Manage**  > **Demote**.

The **Demote Task** panel appears.

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

## Demote Task ✕ Close

**Name:** Execute Change

**Task Instructions:** Execute the changes and create or revise data. When you are done, select the appropriate button, either Release Change or Cancel Change.

**\* Comments:**

Demote

**Demote**

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.

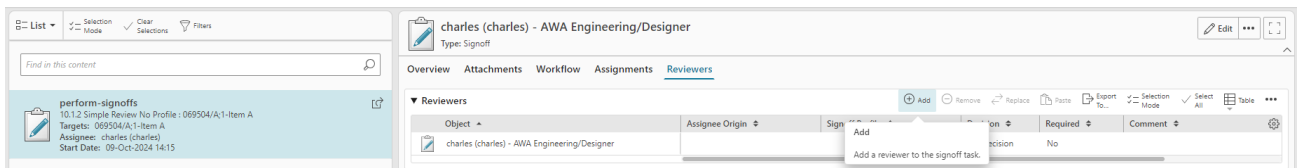
## Add additional reviewers to tasks


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

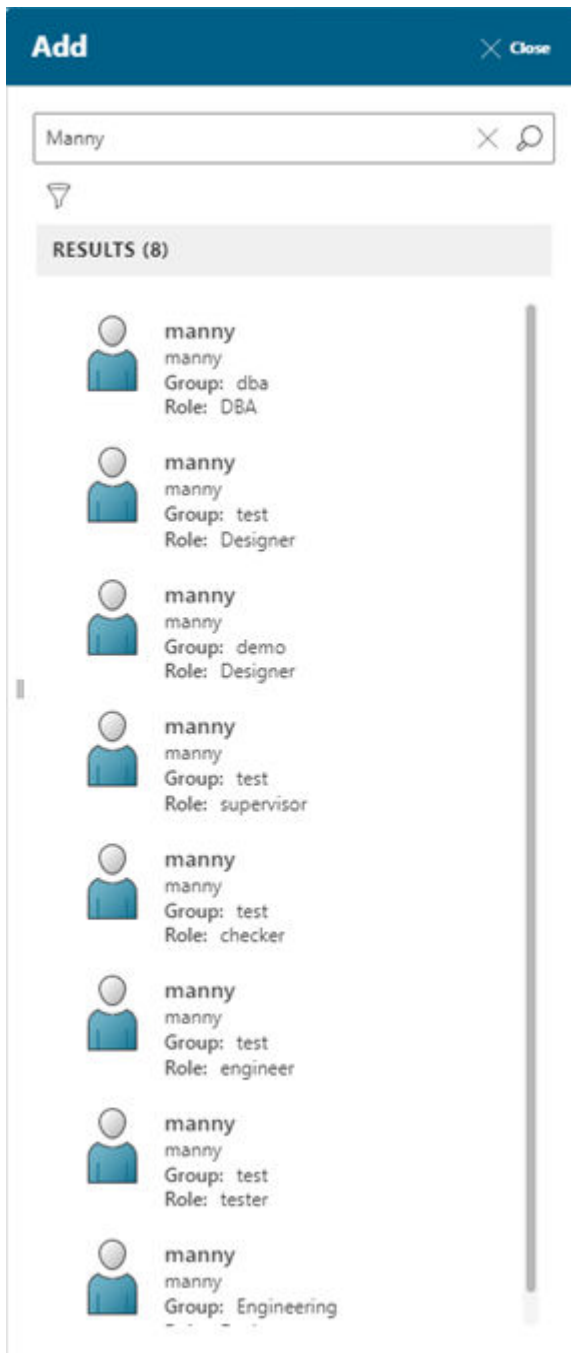
1. On the home page, click the **Inbox** tile.
2. From the **My Tasks** tab, select the perform signoff tasks that require additional reviewers.

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** .



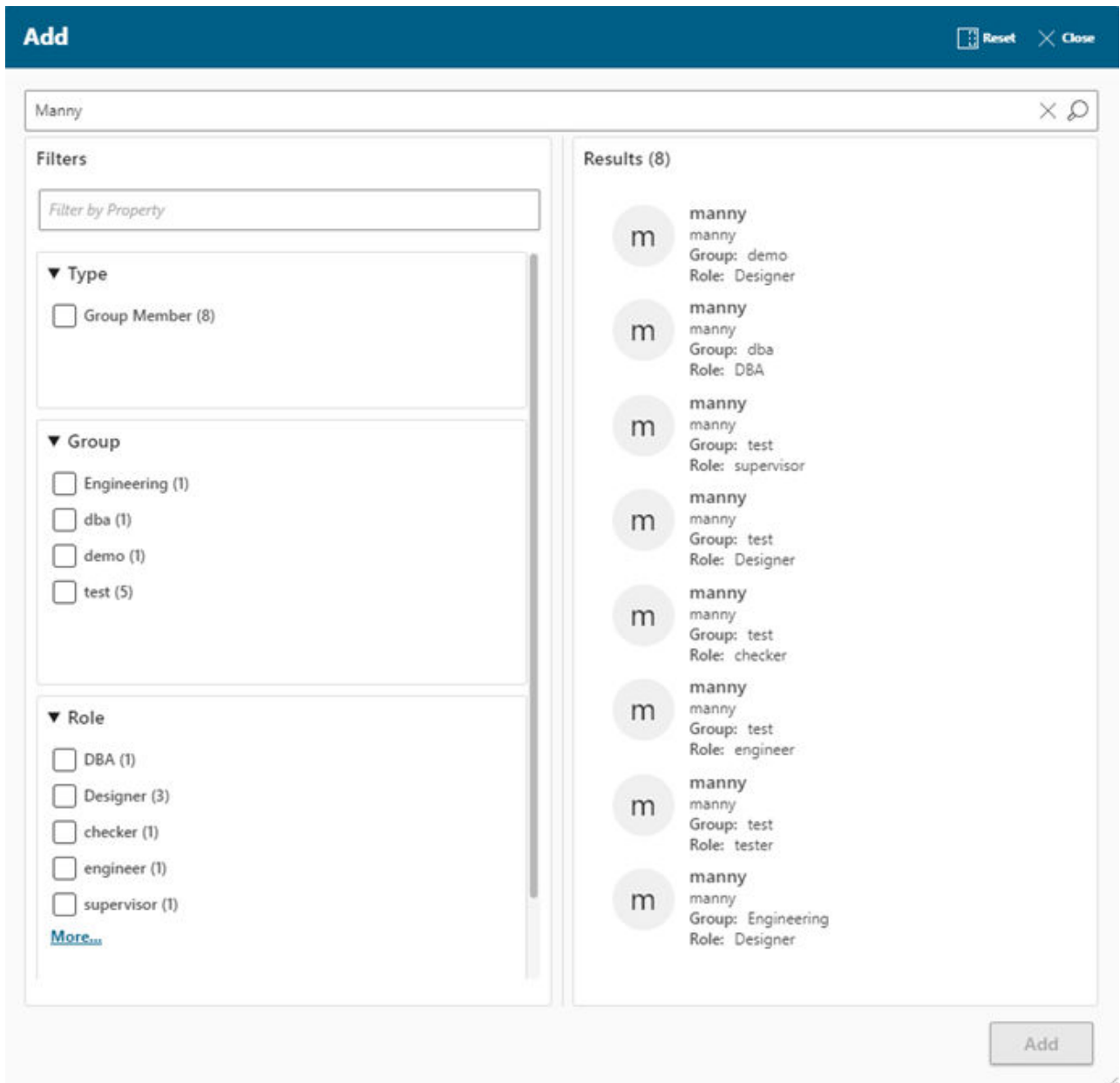
4. In the **Add** dialog box, type the name of the user to whom you want to assign your tasks and press **Enter** or click **Search**  to see results. You can enter a partial name or wildcard characters.



5. For additional search filters, click the **Filter** icon .

You can also display the filters and increase the size of the **Add** panel by dragging the left side of the panel to the left.

Results now display on the right.



Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

6. Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property. You can also search within each property.

Note the following:

- 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 Pool** 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.

7. Make your selection and click **Add**.

The task updates and the new reviewers are added to the current reviewer's list.

## Remove reviewers

Removing a reviewer from a task may be necessary for various reasons, such as unavailability, staffing changes, or changes in the task scope. With the correct permissions, you can remove reviewers when performing signoffs in a Review, Acknowledge, or Route task.

You can perform this action using the Perform Signoff subtask on both the **Assignments tab** and the **Reviewers tab**.

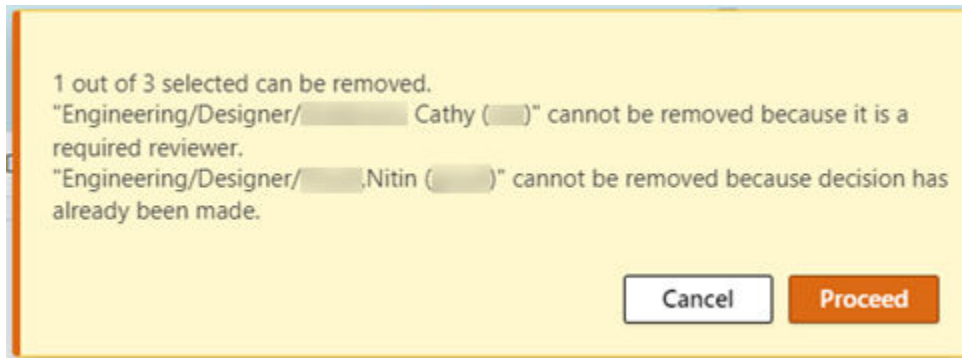
### Limitations

You can remove reviewers from started tasks. However, reviewers cannot be removed from a Perform Signoff task in certain situations, such as:

- An approver has been assigned as a part of signoff profile. In this case, an approver must be replaced, not removed.
- An approver has already made a decision on a signoff.
- A Perform Signoff task has already been completed.
- An approver is marked as a required signoff. In this case, the approver must be replaced, not removed.
- An approval quorum has not been met. That is, a numeric quorum has been set for a Review task, and by removing an approver, the approval quorum is no longer satisfied. For example, if the quorum is set for a numeric value of three, and you try to remove one of those three reviewers, an error will occur. The total number of approvers for a Review task cannot be less than the numeric quorum.

If you attempt to remove a user in any of these scenarios, the **Remove** button will be disabled. When a user selects multiple reviewers and at least one cannot be removed, an error message will explain the reason. Clicking **Proceed** will remove the qualified reviewer.

For example:



When a workflow includes multiple reviews and you try to remove reviewers from different tasks simultaneously using multi-select, only the reviewers from the first selected task will be removed. For instance, if you choose to remove users in Review 1 and also in Review 2, only the removals in Review 1 will be processed, and the changes in Review 2 will be ignored.

**Note:**

If Review tasks are restarted and assignment handlers re-execute, they could potentially add a previously removed approver.

### Automatic Task Completion

Removing an approver can also cause the Review task to automatically complete and the workflow to move to the next step. The following scenarios can result in the automatic completion of a task:

- A percent quorum has been set for a task, allowing the quorum to be met even if an approver is removed. For example, if a Review task is configured with a 50 percent quorum and has five reviewers, the quorum is met when three reviewers approve, and the task automatically completes.
- If a Review task is configured with a 50 percent quorum and has five reviewers, removing one approver reduces the total number of reviewers to four. With two out of the four reviewers already having approved, the quorum is still met, and the task automatically completes. Consequently, the remaining two approvers cannot review or make a decision.
- The **Wait for Undecided Reviewers** flag has been set for a task. A number of approvers have already registered their decisions, meeting the quorum. Removing the undecided approvers will automatically complete the task.

If a task includes required reviewers and multiple users are selected for removal (some required, some not), the required reviewer(s) will not be counted towards a quorum.

### Prerequisites

Your administrator can modify the BMIDE condition **fnd0RemoveReviewerPrivilege** to allow the removal of a reviewer from a task. Default values include:

```
(u.role_name="Workflow Admin") OR (u.group_name="dba")
```

The **Remove** button is enabled by your administrator based on the value of this BMIDE condition in conjunction with the **EPM\_valid\_user\_to\_apply\_assignment\_list** preference. If both the BMIDE condition and the preference are false, reviewers cannot be removed. If the preference is false but the BMIDE condition is true, reviewers can be removed.

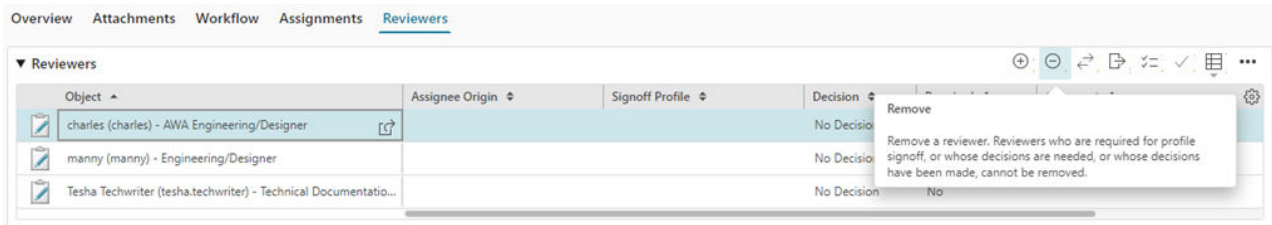
## Procedure

1. On the home page, click the **Inbox** tile.
2. From the **My Tasks** tab, select the Perform Signoff task to remove a reviewer.

The task details are displayed in the work area.

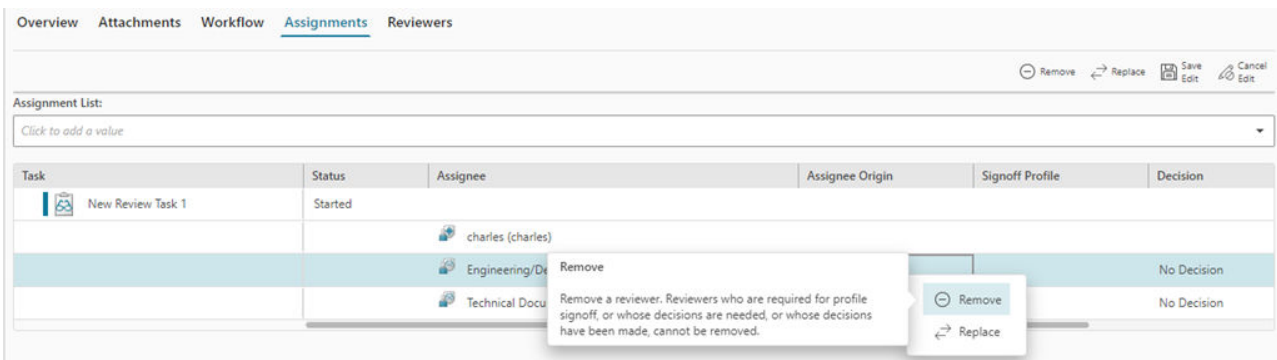
3. From the **Reviewers** tab:

Select the reviewer that you want to remove in the table, then click **Remove**, or right-click and select **Remove**.



From the **Assignments** tab:

Select the reviewer that you want to remove in the table, then click **Remove**, or right-click and select **Remove**.





The **Assignee Origin** column identifies whether the user is from a resource pool, PAL, or is a dynamic participant. The **Decision** column indicates if a signoff has been made, while the **Required** column specifies whether the user is mandatory. The **Signoff Profile** column lists the profile determined in the Workflow Designer.

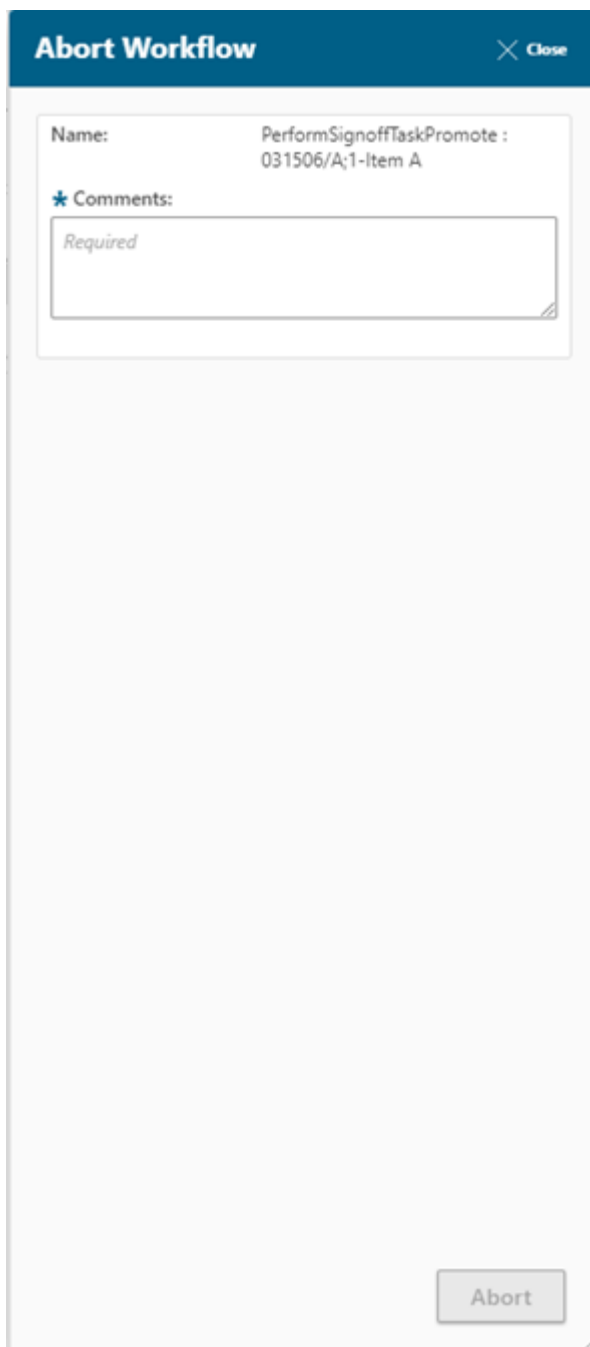
The task updates and the reviewer is removed from both the **Reviewers** tab and the **Assignments** tab. The transaction is also logged in the workflow audit, which you can find on the **Audit Logs** tab for the target object (if enabled by your administrator).

## 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. Go to **More Commands** **...** > **Manage**  > **Abort** .
3. Enter the reason for aborting the task in the **Comments** field and then click **Abort**.



**Abort Workflow** ✕ Close

Name: PerformSignoffTaskPromote :  
031506/A;1-Item A

\* Comments:

Required

Abort

## Enable remote inboxes

### What are remote inboxes?

A *remote inbox* is a mailbox that is subscribed to remotely from one rich client 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 Fundamentals guide.

- 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 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 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**.

- Click **Add** ⊕ (under **Remote Inbox Subscription**) to open the list of all the sites that you can subscribe to.
- 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.

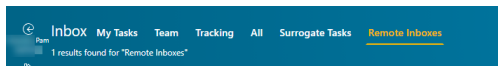
REMOTE INBOX SUBSCRIPTION			
Owning Site	New Tasks Count	Date Modified	
Site2	1	30-Sep-2021	

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

REMOTE INBOX SUBSCRIPTION			
Owning Site	New Tasks Count	Date Modified	
Site2	1	30-Sep-2021	

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 Active Workspace 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, set by your administrator. 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 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. Go to **More Commands** **...** > **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.

- 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.

- 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.

- 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.


- 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.

- Click **Share** to share the selected object with the destination sites. You receive a notification when the transfer completes.
- 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.
- Access the remote site** where you exported the object to.
- 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:

- Click your profile icon and select **Manage Profile**.
- 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.


You can 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. The error message identifies whether the error is in the parent or child task.

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.

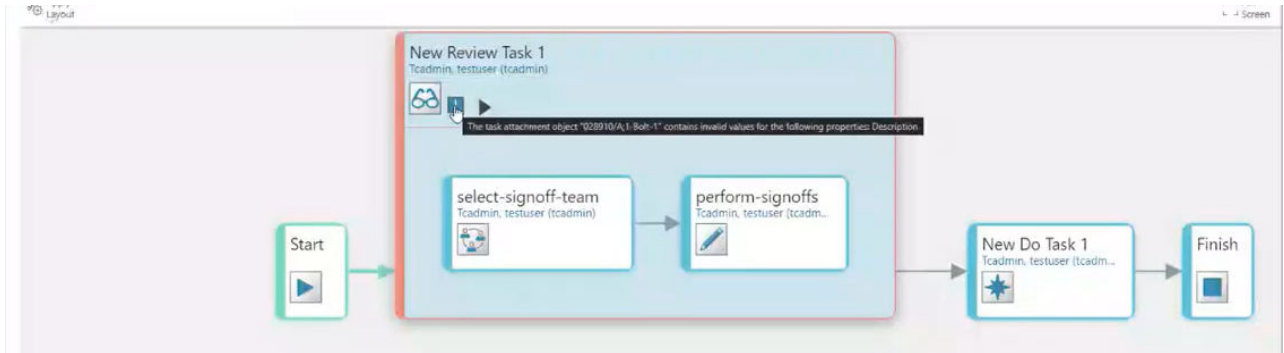
If a current workflow task's **Start** action fails due to an error, the parent task will display in the Inbox and the user must complete the task after resolving the issue. In this case, the error displays on the parent task and identifies the child task that includes the error. Note that Active Workspace does not produce an error message on a **Start** action for a stalled workflow (as in the rich client).

The screenshot displays the Active Workspace interface for a task named 'ReviewTask1'. The task is shown in a list view on the left, with details such as '2406 StartError-DoSST : 029587/A;1-Item A', 'Targets: 029587/A;1-Item A', and 'Start Date: 03-May-2024 12:35'. The main view shows the task details, including an 'Action' section with a red error message: 'Child task "SST1" was not started because of the following error: The task attachment object "029587/A;2-Item A" contains invalid values for the following properties: Description. Once the error is resolved, completing this task will restart the child task.' A 'Complete' button is visible at the bottom of the task details view.

In both cases, the graphical view includes the error icon and you can view its information by selecting the task with the error  in the graphical display. If the error is on the **Start** action, the graphical view auto-expands so you can see the child task with 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. You can also hover over the error icon.



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

The screenshot shows the 'Information' dialog box for a task. The 'Task Errors' section is highlighted with a red box, indicating an error: 'The task attachment object "028910/A;1-Bolt-1" contains invalid values for the following properties: Description'. The dialog is divided into several sections: 'PROPERTIES', 'WORKFLOW', 'REVIEWERS', and 'TARGETS'. The 'PROPERTIES' section includes fields for Name, Task Instructions, Assignee, Comments, Task State, Priority, Start Date, Last Modifying User, and Due Date. The 'WORKFLOW' section includes Name, Description, Workflow, and Template. The 'REVIEWERS' section lists two reviewers with their names, targets, and assignees. The 'TARGETS' section shows a target named 'Bolt-1' with an 'Edit' button.

**Information** Close

**Overview** **All Targets**

**PROPERTIES**

Name: New Review Task 1 Edit Local...

Task Instructions:

Assignee: Tcadmin, testuser (tcadmin)

Comments:

Task State: Pending

Priority:

Start Date:

Last Modifying User: Tcadmin, testuser (tcadmin)

Due Date:

**Task Errors:** The task attachment object "028910/A;1-Bolt-1" contains invalid values for the following properties: Description

**WORKFLOW**

Name: 1 Review Fit Tolerances : 028910/A;1-Bolt-1 Edit Local...

Description:

Workflow: 1 Review Fit Tolerances

Template:

**REVIEWERS**

**perform-signoffs**  
1 Review Fit Tolerances : 028910/A;1...  
Targets: 028910/A;1-Bolt-1  
Assignee: Tcadmin, testuser (tcadm...

**perform-signoffs**  
1 Review Fit Tolerances : 028910/A;1...  
Targets: 028910/A;1-Bolt-1  
Assignee: ,Jason

**TARGETS**

**Bolt-1**

Edit

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.

1. Select the **Assignment Lists** tile on the **Home** page to view, edit, or create new assignment lists.
2. Go to **More Commands** **...** > **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:

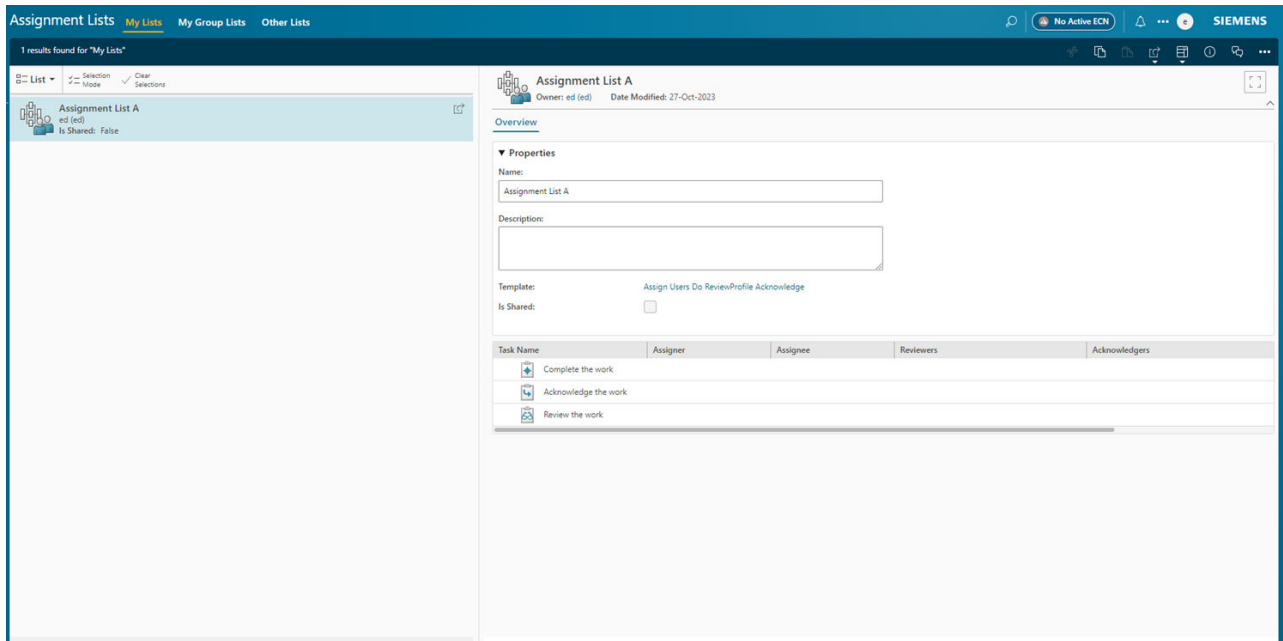
Only group or system administrators can select or edit the **Is Shared** option.


### Create task assignments

Once you create an assignment list, you can add users to its **Task Assignments**. Access your assignment list from the **Assignment Lists** tile.

### Procedure

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

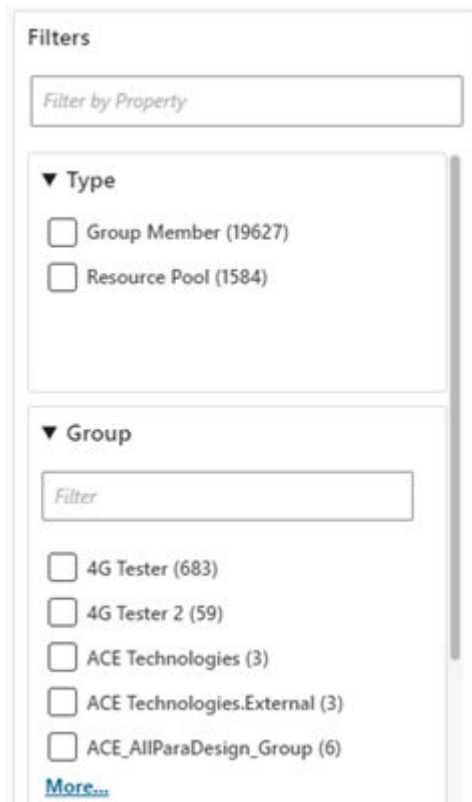


2. Go to **More Commands** **...** > **Edit**  > **Start Edit**.
3. Click a task in the task table to open the **Task Assignments** panel.
4. Drag the left side of the panel to the left to display the filters in the middle panel.
  - a. Use the top-most search box to search for a single group member or group/role. For example, entering **Admin** returns all the available group members and resource pools containing that specific string.

Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).

Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- b. Filters are defaulted to **Type**, **Group**, or **Role**. A search box narrows your search to a specific property.



- c. Under **Type**, specify either a **Group Member** or a **Resource Pool**.
- d. Specify group members for the task by **Group** or **Role**, as necessary. Enter a name in the specific search box to filter.


Once any filters have been applied, results display on the right-side of the panel.

5. Select a group member or resource pool for the task from the results and drag it to the **Assignee** section to populate or change the assignee.

The screenshot shows the 'Task Assignments' window with the following details:

- TASK:** Name: New Do Task 1
- ASSIGNMENTS:** (Empty)
- ASSIGNEE:** RA Admin1, Report reportadmin1, Group: Workflow Ge..., Role: Report Admin
- SEARCH:** Admin
- FILTERS:** Filter by Property
- TYPE:**
  - Group Member (15)
  - Resource Pool (561)
- GROUP:** Filter
- ROLE:** Filter
- RESULTS (720):**
  - RA Admin1, Report reportadmin1, Group: Workflow Rep..., Role: Report Admin
  - RA Admin1, Report reportadmin1, Group: Workflow Ad..., Role: Report Admin
  - RA Admin1, Report reportadmin1, Group: Workflow Ge..., Role: Report Admin (highlighted)
  - AA Admin1, Administr... admin1, Group: dba, Role: dba
  - RA Admin2, Report reportadmin2, Group: Workflow Ge..., Role: Report Admin
  - RA Admin2, Report reportadmin2, Group: Workflow Ad..., Role: Report Admin

A red arrow points from the 'ASSIGNEE' section to the 'TYPE' section, specifically highlighting the 'Resource Pool' option.

Additionally, you can select a group member or resource pool from the results, and then click **Assign** .

**Task Assignments** Close

**▼ TASK**  
Name: New Do Task 1

**▼ ASSIGNMENTS**

**▼ ASSIGNEE**  
**Assign**

**Admin** Close

**FILTERS**  
Filter by Property

**▼ TYPE**  
 Group Member (15)  
 Resource Pool (561)

**▼ GROUP**  
Filter

!#\$\_,+\*=[\|/?,':; (2)  
 1234567890123456:  
 ADA Administrator  
 ANY (21)  
 Administrators.MyC  
[More...](#)

**▼ ROLE**

**RESULTS (720)**

- RA** Admin1, Report reportadmin1  
Group: Workflow Rep...  
Role: Report Admin
- RA** Admin1, Report reportadmin1  
Group: Workflow Ad...  
Role: Report Admin
- RA** Admin1, Report reportadmin1  
Group: Workflow Ge...  
Role: Report Admin
- AA** Admin1,Administr... admin1  
Group: dba  
Role: dba
- RA** Admin2, Report reportadmin2  
Group: Workflow Ge...  
Role: Report Admin
- RA** Admin2, Report reportadmin2

Select a group member or resource pool to display the **Remove** button to remove them from an assignment.


For a **Review** task, drag and drop a group member or resource pool to the highlighted **Required** icon.

The screenshot shows the 'Task Assignments' window with a dark blue header and a 'Close' button. The main content is divided into several sections:

- TASK:** Name: Review the work
- ASSIGNMENTS:** (Empty)
- ASSIGNER:** (Empty)
- REVIEWERS:** Contains two entries:
  - 1 Required: GroupA/RoleA RA (highlighted with a blue border)
  - 2 Required: Engineering/De...
- ADDITIONAL REVIEWERS:** (Empty)
- FILTERS:** Includes a search bar 'Find in this content', a 'Filter by Property' dropdown, and sections for 'TYPE' (Group Member (26), Resource Pool (1)) and 'GROUP' (RoleA (27)).
- RESULTS (27):** A list of users including adsuser\_12 through adsuser\_17, each with their group and role information. adsuser\_16 is highlighted with a blue background.



A red arrow points from the 'RoleA (27)' filter section towards the '1 Required' reviewer entry.

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

Or, select a group member or resource pool, click the profile name icon so it is highlighted, and then click **Assign**  under the specific section. Click **Remove** to remove a group member or resource pool from an assignment.

- Click **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.

- When you complete all task assignments, go to **More Commands**  > **Edit**  > **Save Edit**.

Users appear under the correct column according to the task.

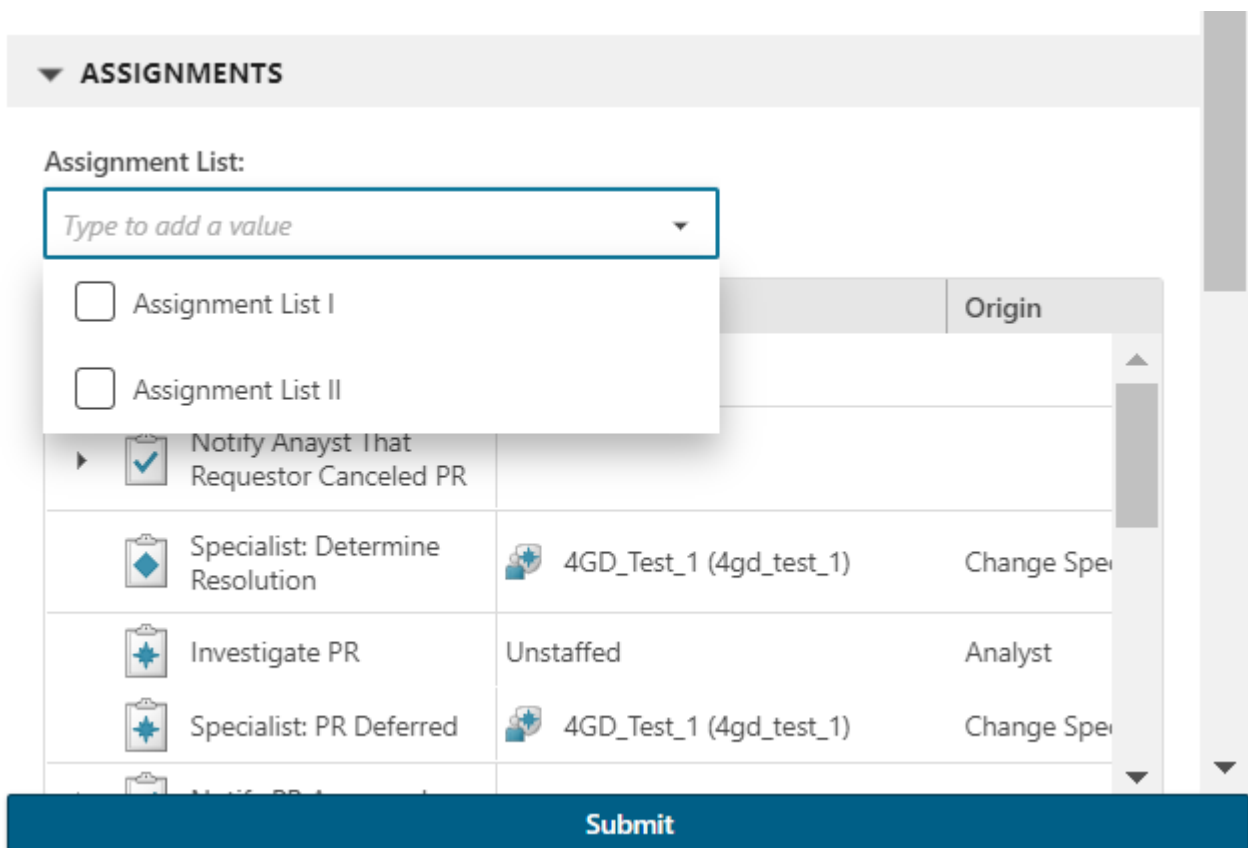
## Apply assignment lists

### 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.

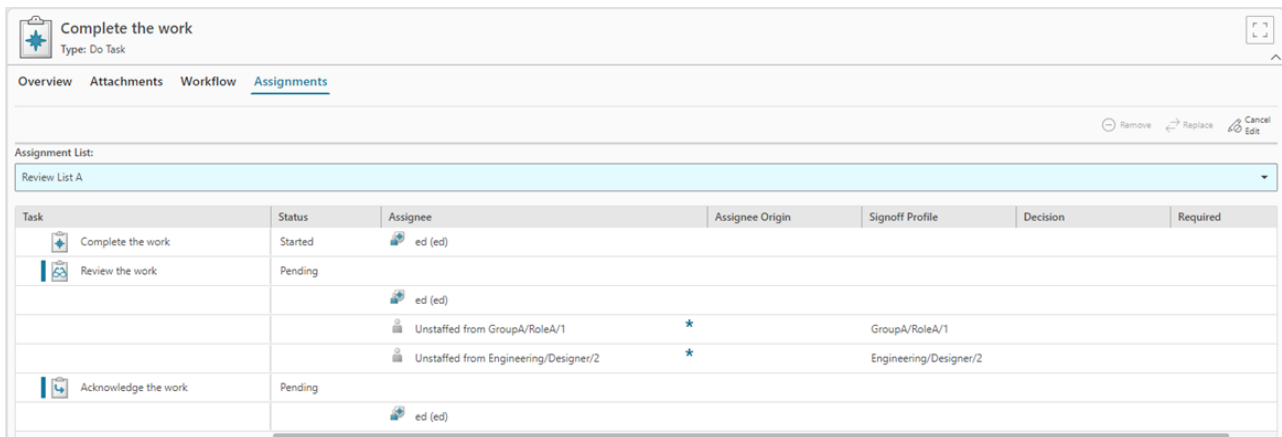
Tasks can be assigned or reassigned in the task table. Drag and drop a user or resource pool directly to the **Assignee** column of a task in the table, as required. Click a task to display the middle **Assignments** panel, where you can drag and drop users or resource pools to any dynamic participants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



Task	Status	Assignee	Assignee Origin	Signoff Profile	Decision	Required
 Complete the work	Started	 ed (ed)				
 Review the work	Pending	 ed (ed)				
		 Unstaffed from GroupA/RoleA/1	*	GroupA/RoleA/1		
		 Unstaffed from Engineering/Designer/2	*	Engineering/Designer/2		
 Acknowledge the work	Pending	 ed (ed)				

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 **Task 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.


### Note:

The preference **EPM\_valid\_user\_to\_apply\_assignment\_list**, set by your administrator, determines the users with proper privileges to apply assignment lists. The preference can set the rights based on group, ownership, or anyone.


## Manage assignment lists

Only group and system administrators can edit assignment lists.

## Procedure

1. Select the **Assignment Lists** tile to manage existing assignment lists.
2. Select an assignment list, and then 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**.

## 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. Go to **More Commands**  > **Import/Export**  > **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.



- 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.

- Click the **Assignment Lists** tile on the **Home** page.
- Select one or more assignment lists to export.
- Go to **More Commands ...** > **Import/Export**  > **Export** .

The **Export** panel appears.

- 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.

- (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.

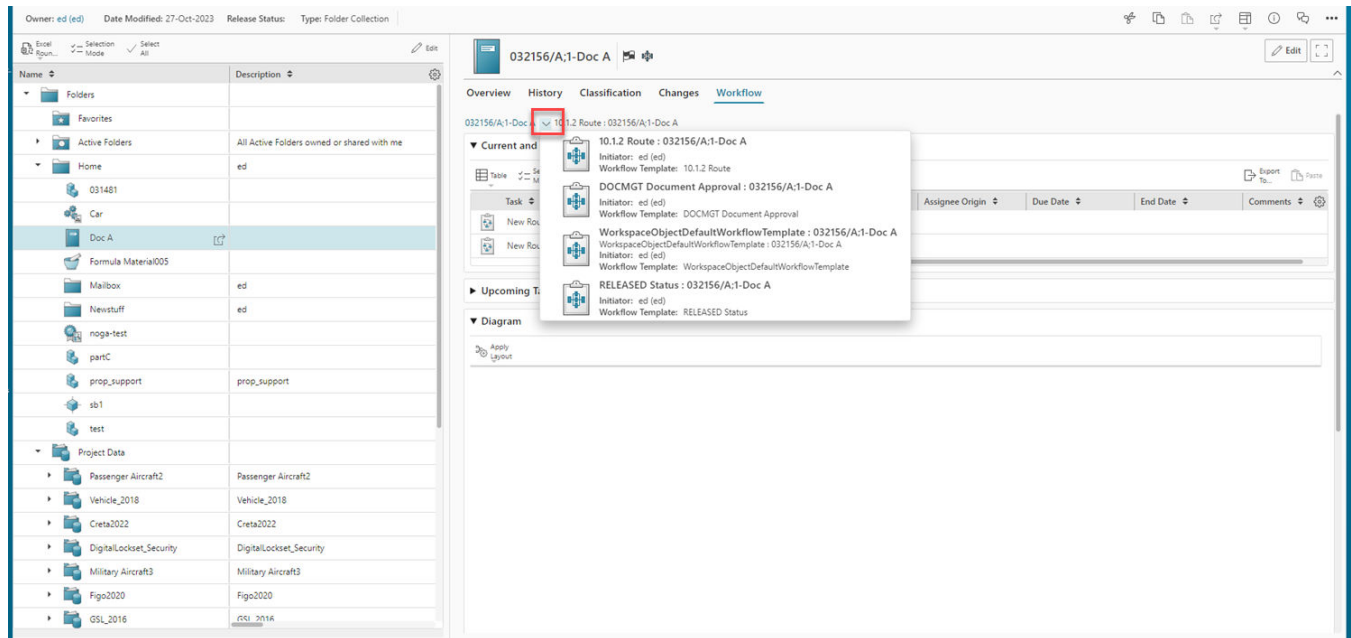
6. Select the language that you want the assignment list to export to in the **Languages** list. The assignment list will be in that language when it gets imported.
7. Click **Export** to export the assignment lists.

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.

- When you navigate to the **Workflow** tab, the system will automatically select the first workflow that has a task assigned to the logged-in user.

For example, if the top workflow in the list (Subprocess 2) does not have a task assigned to the logged-in user, but the second workflow in the list (Subprocess 1) does, the system will auto-select Subprocess 1.

## 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.

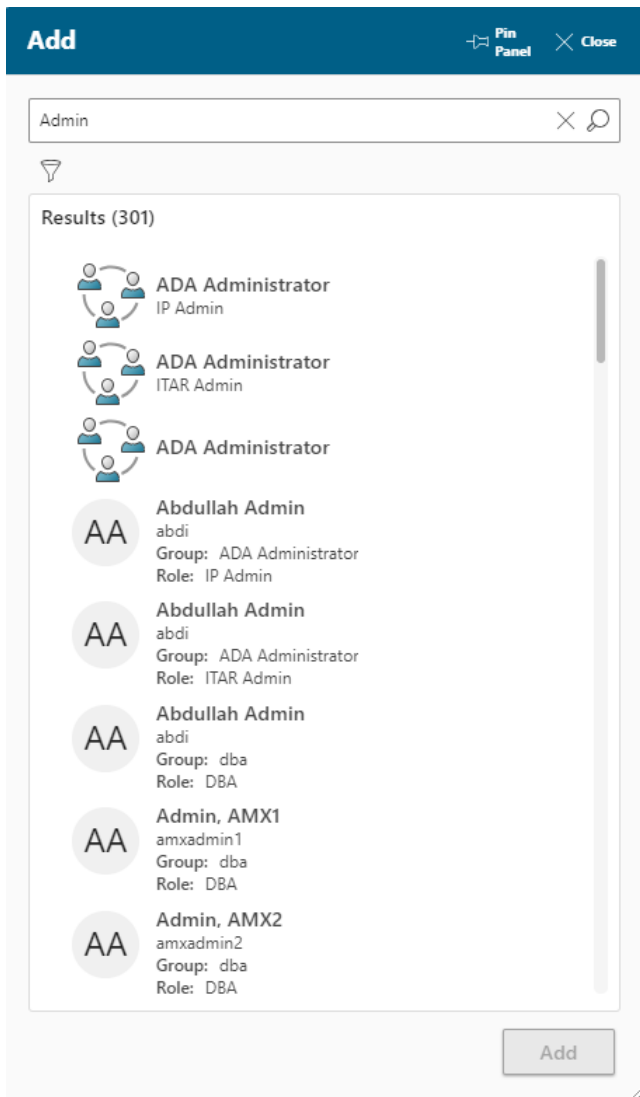
**Add** or **Replace** only appear if you have privileges to add or replace participants.

1. Open the object you want to assign and click the **Participants** tab.
2. Click **Add** ⊕ to add a participant or **Replace** ⇄ for the participant 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. In the **Add** (or **Replace**) panel, type the name of the user to whom you want to add or replace, then press **Enter** or click **Search** 🔍 to see results. You can enter a partial name or wildcard characters.

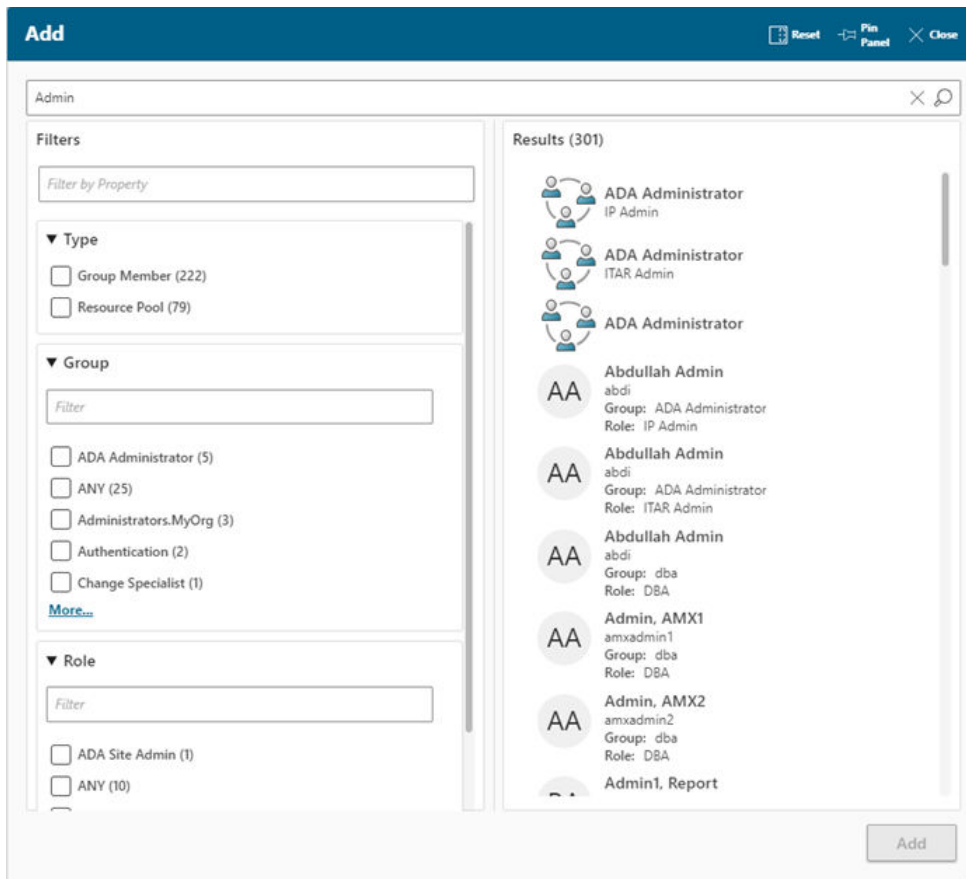
Use the keywords **userid**, **group**, or **role** to narrow your search. Combine keywords by including a space in between (such as **role:checker userid:ed**), and for any term that contains a space, use quotations (**group:"Workflow Reports"**).



4. For additional search filters, click the **Filter** icon .

You can also display the filters and increase the size of the **Add** panel by dragging the left side of the panel to the left.

Results now display on the right.



Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

5. Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property. You can also search within each property.
6. Make your selection, enter any comments, and click **Add**.

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

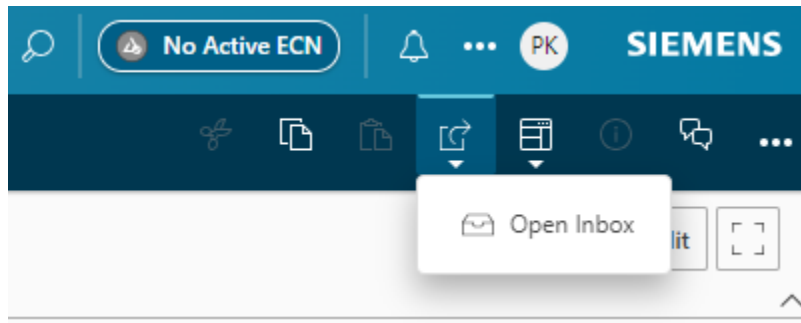
7. (Optional) You can select users for a review board in the same manner.


## 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

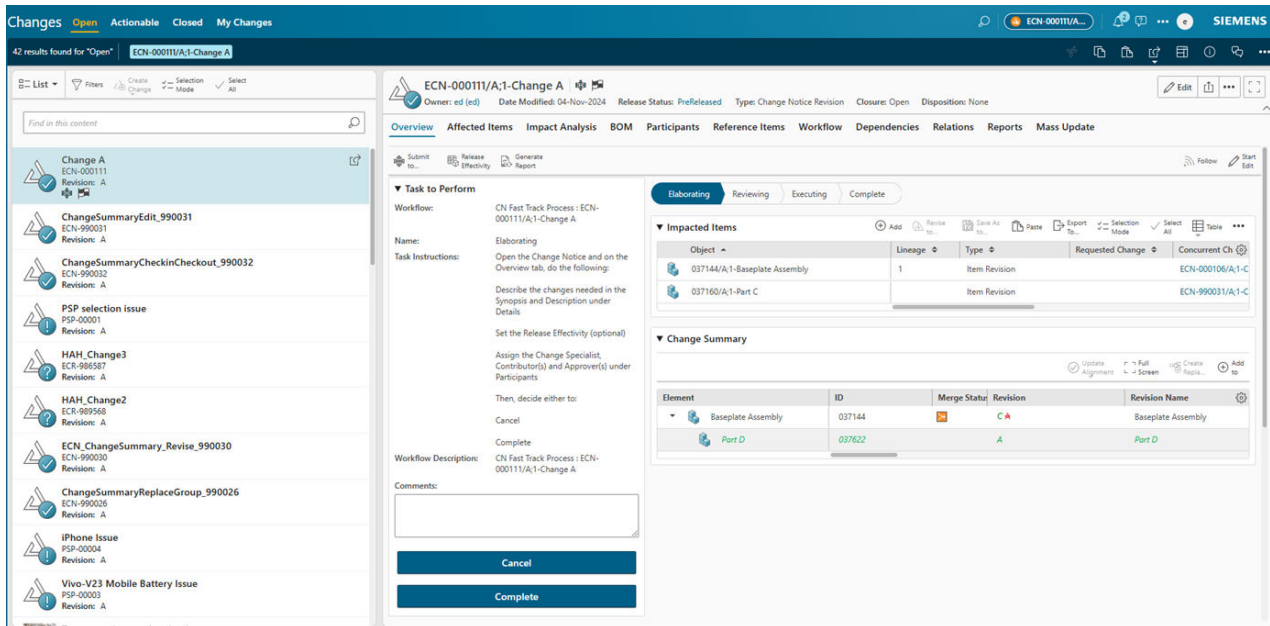


1. Search for a user, using the user's name, role, or program assignment. You can also select the user's name anywhere (for example, from a participant or owner list).
2. Select the user name and view the user's profile page, for example, check if the user is out of the office and when they will return.
3. (Optional) Under **My Surrogates**, **manage the user's surrogate assignments**.
4. (Optional) Click **Open**  > **Open Inbox** and **reassign** their tasks.

## Perform a task in the Changes Overview tab

In addition to performing an assigned task from your Inbox, you can perform a task in the **Overview** tab of a change.

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 **Task to Perform**.

**▼ Task to Perform**

**Workflow:** CN Fast Track Process : ECN-000111/A;1-Change A

**Name:** Elaborating

**Task Instructions:** Open the Change Notice and on the Overview tab, do the following:

Describe the changes needed in the Synopsis and Description under Details

Set the Release Effectivity (optional)

Assign the Change Specialist, Contributor(s) and Approver(s) under Participants

Then, decide either to:

Cancel

Complete

**Workflow Description:** CN Fast Track Process : ECN-000111/A;1-Change A

**Comments:**

**Cancel**

**Complete**

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.

▼ TASK TO PERFORM

Workflow:

CN Process : ECN-000025/A;1-WF dropdown test3

CN Process : ECN-000025/A;1-WF dropdown test3

10.1.2 Simple Review No Profile : ECN-000025/A;1-WF dropdo...

Task Instructions: Assign the Change Specialist 1 participant on the CN revision. Complete task when assignment done.

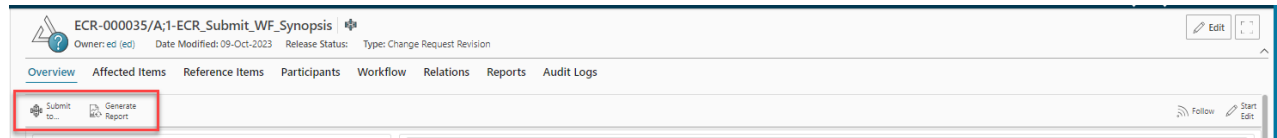
Workflow Description: WF dropdown test3

Comments:

Complete

**Note:**

The **Overview** tab includes a frequently used commands toolbar that quickly lets you submit the selection to a workflow, generate a report based on the selected object, follow any actions and receive notifications on the selected object, and start an edit on the object properties.






## Task forwarding


### Automatically forward your tasks

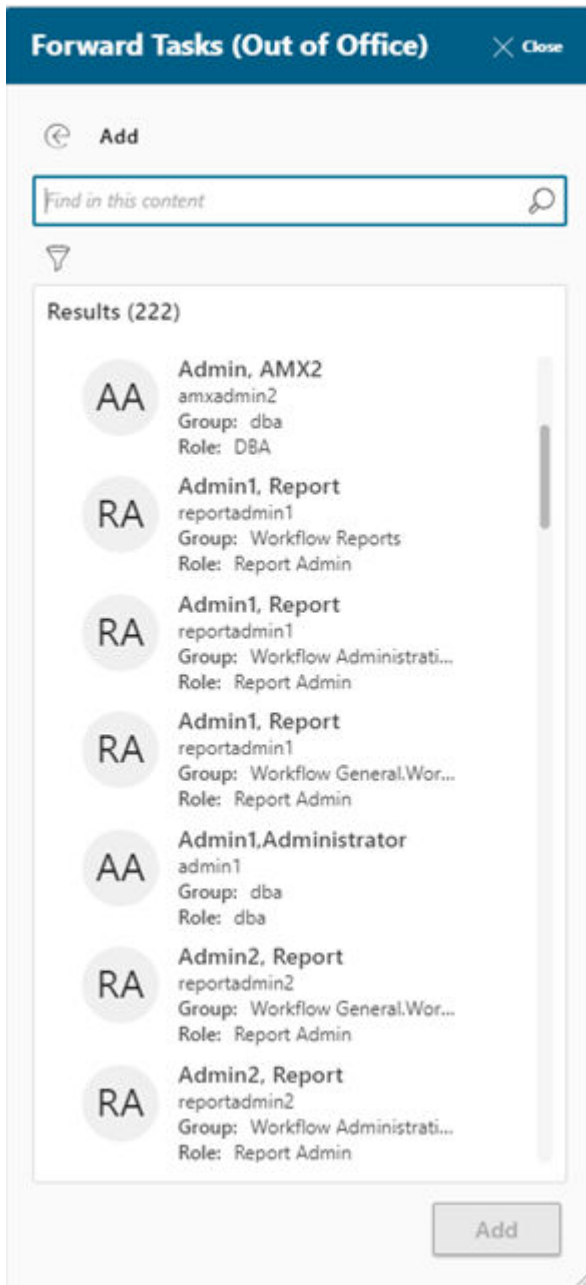
You can set up the automatic reassignment of any tasks that you receive during a set period of time to another user. For example, you can assign any tasks you receive while on vacation to another member of your team. If you do not enter an end date, the delegated user always receives your tasks.

**Note:**

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

1. Select your name, and choose **Manage Profile**.
2. Go to **More Commands** **...** > **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**, the current date and time is used as the start date.
4. Under **Recipient**, click **Add** .

- In the **Forward Tasks (Out of Office)** panel, type the name of the user to whom you want to forward tasks to and press **Enter** or click **Search**  to see results. You can enter a partial name or wildcard characters.



- For additional search filters, click the **Filter** icon .

You can also display the filters and increase the size of the **Forward Tasks (Out of Office)** panel by dragging the left side of the panel to the left.

Results now display on the right.

**Forward Tasks (Out of Office)** Reset Close

← Add

Find in this content 🔍

**Filters**

Filter by Property

▼ **Type**

Group Member (222)

▼ **Group**

Filter

ADA Administrator (2)

Administrators.MyOrg (1)

Authentication (1)

Change Specialist (1)

Engineering (6)

[More...](#)

▼ **Role**

**Results (222)**

- AA** Abdullah Admin  
abdi  
Group: dba  
Role: DBA
- AA** Abdullah Admin  
abdi  
Group: ADA Administrator  
Role: ITAR Admin
- AA** Abdullah Admin  
abdi  
Group: ADA Administrator  
Role: IP Admin
- AA** Admin, AMX1  
amxadmin1  
Group: dba  
Role: DBA
- AA** Admin, AMX2  
amxadmin2  
Group: dba  
Role: DBA
- RA** Admin1, Report  
reportadmin1  
Group: Workflow Reports  
Role: Report Admin
- RA** Admin1, Report  
reportadmin1  
Group: Workflow Administrative.Workflow...  
Role: Report Admin
- RA** Admin1, Report

Add

Once a search is performed and the results display, this top-most search box can be used again to additionally narrow those results.

- Filters are defaulted to **Type**, **Group**, or **Role**. If the user is assigned to a project, the **Project** filter is available. A search box narrows your search to a specific property. You can also search within each property.
- Make your selection and click **Add**.
- Click **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:	no
Inbox Delegate:	Analyst, Carol (carolanalyst)
Unavailable From:	30-Oct-2023
Unavailable To:	03-Nov-2023

#### 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.

#### ▼ Forward Tasks (Out of Office)

Out of Office:	no
Inbox Delegate:	Analyst, Carol (carolanalyst)
Unavailable From:	30-Oct-2023
Unavailable To:	03-Nov-2023

#### 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**.

2. Go to **More Commands ...** > **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** in the upper-left corner to display the reports in a list.

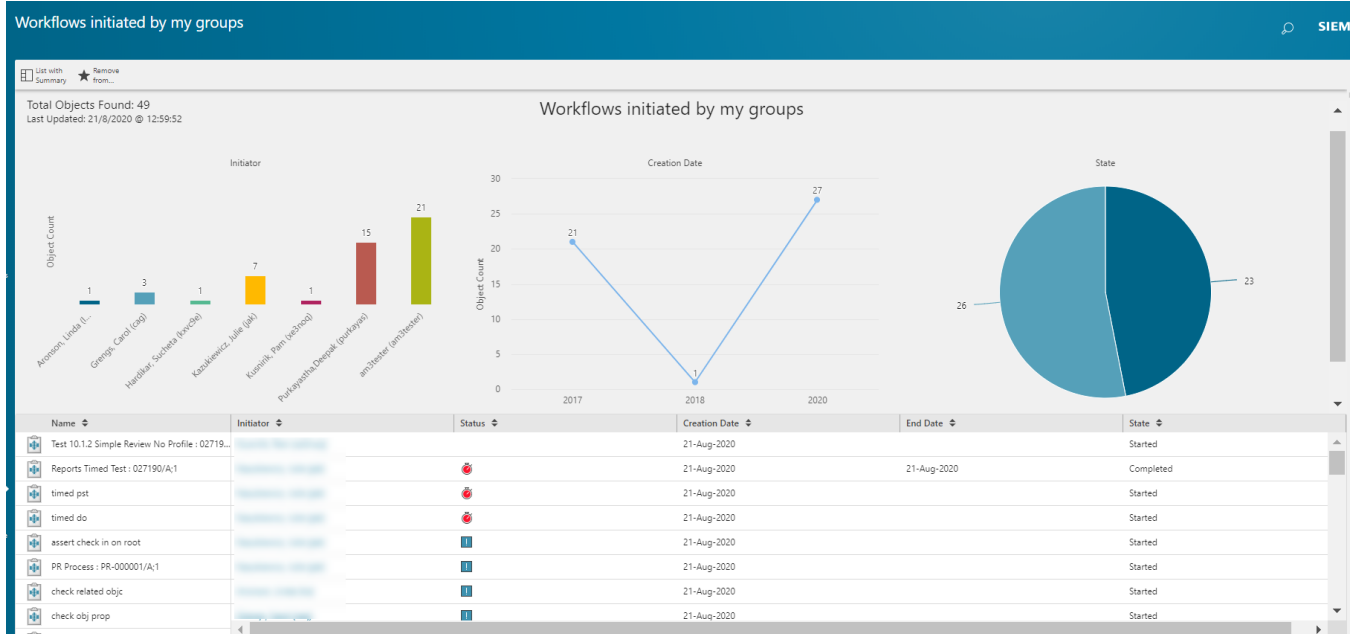
2. In **My Dashboard**, click a report name to open it.

Workflow reports include:

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

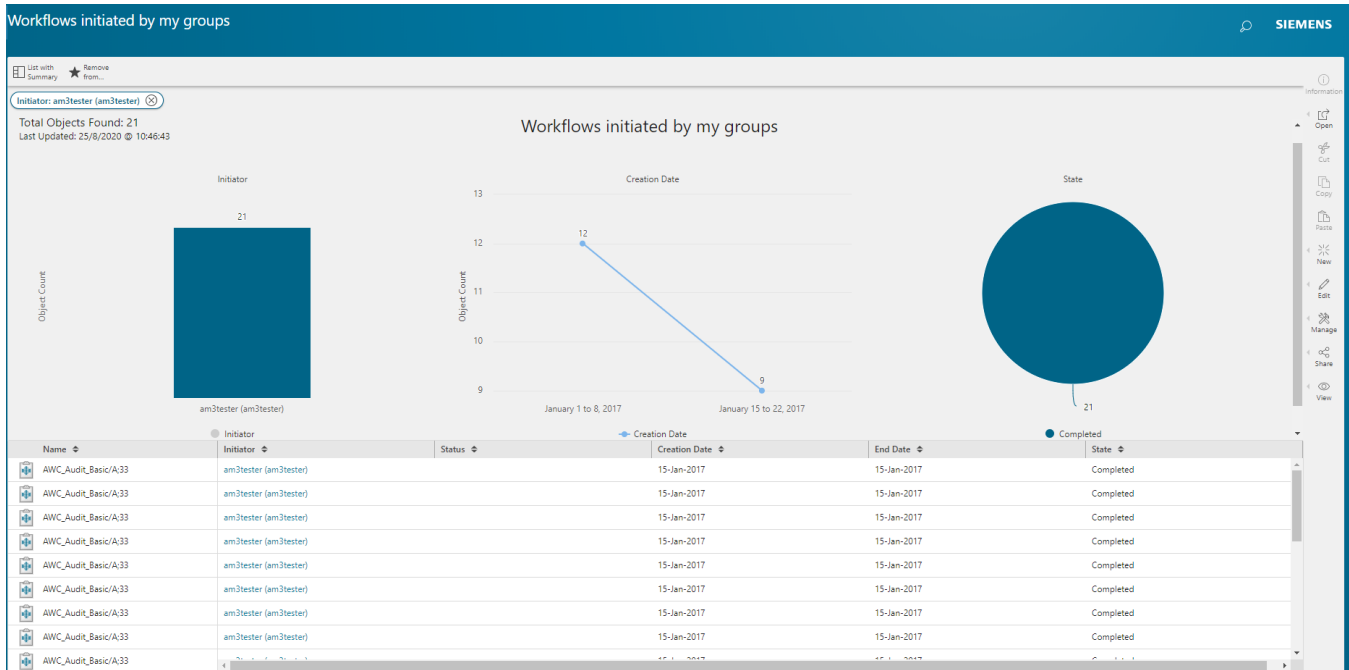
## View the workflow report data

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

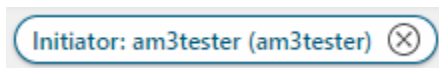


For example, in the **Workflow initiated by my groups** report, the chart and table show all workflows that have been started by groups that the user is a member of. The table displays the workflow name, initiator, status, creation date, end date, and state. Table columns vary depending on the type of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

## Generate Report

← BACK

### REPORT INFORMATION

Process: Method::AWCustomAsItem  
Output: Method::AWCustomAsItem  
Method Name:

### FORMAT

Style Sheet:

Report Display Locale:

Save to FileName:

Generate

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



# 5. Workflow configuration

## Configuration tasks

You may want to change how workflow assignments are displayed to end users.

You can configure the following aspects of workflow:

- Configure resource pool assignments
- Set conditions for workflows
- Show user assignment options
- Configure the inbox

## Configuring resource pool assignments

Use the **WRKFLW\_auto\_subscribe\_to\_resource\_pools** preference to have the Inbox display those tasks assigned to resource pools that the user is a member of based on the user's group or role (referred to as automatic subscription). If you turn off automatic subscription, only tasks assigned to the resource pools to which the user has been manually subscribed appear. The default is automatic subscription.

Note:

Currently, users cannot manually subscribe to resource pools.

## Setting conditions for workflows

Use the **Fnd0AssignTaskPrivilege** Business Modeler IDE condition to restrict the reassignment of workflow tasks. By default:

- Users belonging to the **dba** group can reassign any task.
- The current user who is either the assignee of the task or an active surrogate can reassign a task.
- For signoff tasks, if the decision has not been set, the current user who is either the assigned group member or the active surrogate can reassign the task.

Use the **Fnd0AddReviewerPrivilege** Business Modeler IDE condition to restrict the addition of reviewers at the perform signoff stage of workflow tasks. By default all users can add reviewers to perform signoff tasks.

Refer to *BMIDE for Data Model Design* in the Teamcenter for more information about setting conditions.

## Showing user assignment options

The **WRKFLW\_show\_user\_assignment\_options** preference shows project teams for user selection. It sets the display of the organization or project teams in the user search panel when you assign users to workflow tasks as responsible parties, reviewers, and dynamic participants.

The user list is restricted to the organization or the selected project in the project list. If this preference is set to **org\_only**, projects should not be shown. If this preference is set to **project\_only**, the users outside the assigned projects are not shown for selection. If the option is set to **project\_default**, the owning project is preselected and its team should be shown by default.

## Configuring workflows

### Configuring workspace objects

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 conjunction 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 to workflow configuration

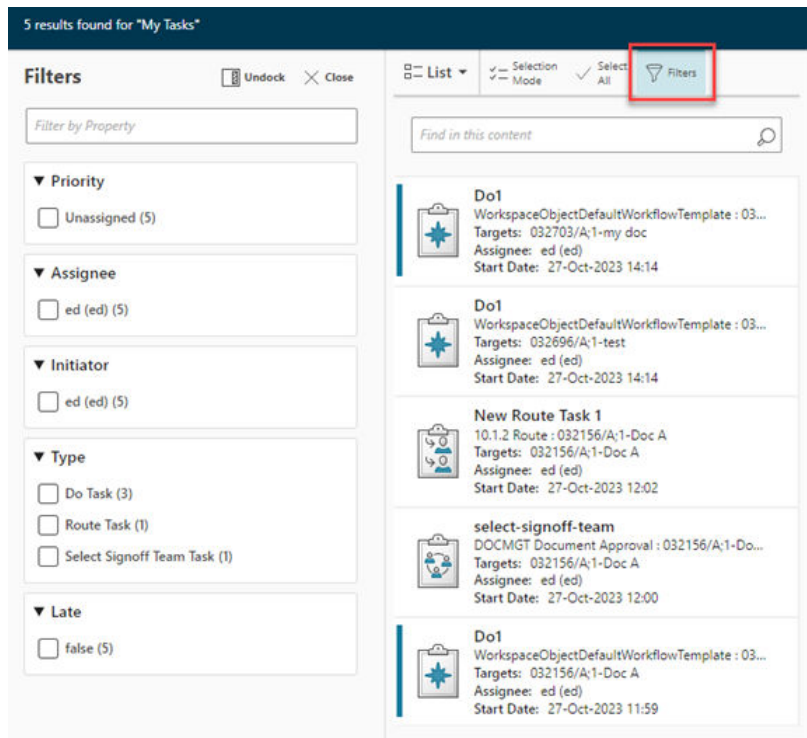
Configuring the following preferences is important when optimizing the **Submit to Workflow** panel.

- The **WRKFLW\_peoplepicker\_default** preference, set by your administrator, controls the groups across which search is performed to return the users, group members, and resource pools in this search panel. Valid values are: **0** (use all groups in the entire organization for search) and **1** (use the logged in user's group for search).
- The **TC\_language\_search** preference specifies the locale used in a search. If it is set, the search is executed in that language, regardless of the locale that you are logged in as. If it is not set, the search defaults to the locale that the user is logged into. Search is supported in both the MASTER locale (English) as well as the NON-MASTER locale (German, Japanese, and so on).
- In the **Template** list, the visibility of templates is managed with the **CR\_allow\_alternate\_procedures** preference. **Assigned** only displays templates that match specific criteria set by the administrator.

## Configuring the Inbox

### Setting up filtering in the Inbox

You can set the properties to be used to filter the tasks that appear in the Inbox, as shown in the figure for the tasks found when selecting the **Team** tab. The tasks are Workflow business objects of the **EPMTask** type and its subtypes.



To set the filtering, in the Business Modeler IDE, set the following property constants on the property of the Workflow business object on which you want to filter.

- **Awp0InboxCanFilter**

Indicates that Workflow objects can be filtered on the property.

- **Awp0InboxFilterPriority**

Indicates the priority of the property that determines its order in the list of filters displayed in the Inbox. The lower the value, the higher its priority and, therefore, the higher its position in the list of filters.

Siemens Digital Industries Software recommends that you assign values from a range to accommodate additional properties in the future. For example, assign priorities such as 100, 200, and 300, instead of 1, 2, and 3.

By default, the following properties are shown as filters for Workflow business objects:

- **object\_type**

The type of object.

- **due\_date**

The date the object is due.

- **fnd0Assignee**

The user to whom the task is assigned.

- **fnd0Priority**

The priority of the task.

- **fnd0WorkflowInitiator**

The user who initiated the workflow on the task.

Workflow filters can only be set on the following types of persistent properties or compound properties targeting them.

Property types supported for filtering	Property types not supported for filtering
<ul style="list-style-type: none"> <li>• Date</li> <li>• String</li> <li>• References</li> <li>• Logical</li> </ul>	<ul style="list-style-type: none"> <li>• String properties with long string as storage</li> <li>• Numeric properties</li> <li>• Array properties</li> </ul>

## Configuring email notification

You can send users email notifications when there are workflow tasks in their inbox. The email notification contains a link to the task so the user can select it to open the task in their Inbox.

Use the following workflow handlers and preferences to configure the notifications.

- Use the following workflow handlers to Insert a link to the workflow process into the notification email.

- **EPM-notify**

Informs users of a task's status through email.

Contains a **-url** argument. The value is **activeworkspace**.

If the **-url** argument is not specified, the values specified in the **EPM\_notify\_url\_format** preference is used.

- **EPM-notify-report**

Sends a report through email to all task reviewers.

If the **-url** argument is not specified, the values specified in the **EPM\_notify\_url\_format** preference is used.

- **EPM-notify-signoffs**

Informs users of a signoff task's status through email. It does not contain a **-url** argument. Instead, it uses the format specified in the **EPM\_notify\_url\_format** preference.

- For a link to be added in the notification email, either of the following two hosting preferences must be present:

Note:

These preferences are not included in your Teamcenter installation. You must add them to the database.

- **ActiveWorkspaceHosting.URL**

Specifies the URL that the rich client uses to communicate with Active Workspace for hosted operations, such as search, open item, and others.

**URL=http://<host>:<port>/awc**

- **ActiveWorkspaceHosting.WorkflowEmail.URL**

Specifies the URL used that the workflow uses to communicate with Active Workspace for email links. For example:

**URL=http://<host>:<port>/awc**

In addition, the **EPM\_notify\_url\_format** preference contains the **activeworkspace** value to use to specify that an email notification should contain a link to the task.

For more information about these workflow handlers and preferences, see *Workflow Designer on Rich Client* and *Teamcenter Environment Variables* in the Teamcenter help.

### Allowing access to the Inbox of other users

Use the **Fnd0AccessInboxPrivilege** Business Modeler IDE condition to set what users can open another user's Inbox. By default, users belonging to the **dba** group are given privileges to open another user's inbox. Other users do not have permission.

Refer to *BMIDE for Data Model Design* in the Teamcenter help for more information about setting conditions.

### Displaying custom properties in the inbox

If you want to display custom properties in the inbox, you need to understand the basic functionality of three important objects in the data model.

- **EPMJob**
- **EPMTask**
- **Signoff**

Tip:

This is a brief overview of a few essential objects and properties for workflow. The object and property descriptions in the Business Modeler IDE are the source for complete information about objects and their properties.

### EPMJob

The **EPMJob** object is a child of **WorkspaceObject**.

It represents the entire workflow process execution.

The **root\_task** property contains a link to the top-level **EPMTask** object. This root task is the starting point for navigation to all the other tasks in the workflow task hierarchy.

## EPMTask

The **EPMTask** object is a child of **WorkspaceObject**.

It represents an individual step taken during the workflow process execution.

Properties like **parent\_task** and **child\_task** define the workflow's structure by containing links to other **EPMTask** objects.

The **successors** property lists which tasks will be launched after this one finishes (reaches the **complete**, **failed**, or **skipped** state).

The **signoff\_attachments** property contains a list of **Signoff** objects related to the task.

## Signoff

The **Signoff** object is a child of **POM\_application\_object**.

It represents a decision and related properties.

This object keeps track of not only the decision itself, but also key properties such as, the decision-maker, the date of the decision, and any comments.

## Custom properties in the Inbox

The **Inbox** will normally display one of the children of the **EPMTask** object, so the **EPMTask** is where you add your custom property. However, when the review or acknowledge task is asking for approval during the **Perform signoff** task, the **Inbox** will display the **Signoff** object instead.

The **Signoff** object is not a child of the **EPMTask** object, so you must be certain to add your custom property to the **Signoff** object as well, if you want it to always be displayed.