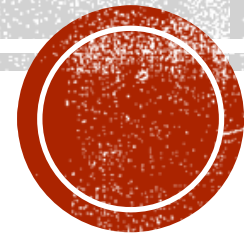


WINDCHILL WORKFLOW DOCUMENTATION

David Mertz



WORKFLOW DOCUMENTATION

- Ability to Document your workflows
 - No Matter how Complicated
 - Sample PR Document 95 Pages
- Documented Workflows allow
 - Enable Tech Support to quickly evaluate questions without navigating through each step manually
 - Future Architects to See Current Design
 - Sponsor (Customer) to see all the workflow data in one spot
 - No need for manual screenshots of data
 - Searchable
 - Ability to compare Requirements Specification to Actual Implemented Design



SAMPLE PAGES OF WORKFLOW DOCUMENTATION

Workflow Name: Approval Process



Default view
Category: DEFAULT
Requestable Role:
Description: This meeting process allows the committee select project team members to review and approve a discussion paper. All approvals are required via Approval Request or require a checklist of the subject.
Content: CONTENTS approval_request

Workflow Properties

Variables

Variable Name	Type	Default	Required	Visible	Editable	Deletable	Searchable	Filterable
user_authentication	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
is_authentication_ok	boolean							
action_authentication	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
action_authenticate	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
action_logout	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Defined Roles

Role Name	Permissions
Requester	Request
Approver	Approve, Deny
Reviewer	Review

Assigned Activities

Users and Results

User	Status	Result	Start	End	Role	Task
Requester	Pending					
Approver	Pending					
Reviewer	Pending					

Participating

Participant	Permissions
Requester	Request
Approver	Approve, Deny
Reviewer	Review

Approval Request

Request Type: APPROVAL

Requester: [User]

Request Description: [Text]

Request Status: Pending

Request Date: [Date]

Request Priority: [Priority]

Request Category: [Category]

Request Subcategory: [Subcategory]

Request Reason: [Reason]

Request Comments: [Comments]

Request Actions: [Actions]

Request Results: [Results]

Request History: [History]

Request Settings: [Settings]

Request Tools: [Tools]

Request Help: [Help]

Request About: [About]

Approval Request

Request Type: APPROVAL

Requester: [User]

Request Description: [Text]

Request Status: Pending

Request Date: [Date]

Request Priority: [Priority]

Request Category: [Category]

Request Subcategory: [Subcategory]

Request Reason: [Reason]

Request Comments: [Comments]

Request Actions: [Actions]

Request Results: [Results]

Request History: [History]

Request Settings: [Settings]

Request Tools: [Tools]

Request Help: [Help]

Request About: [About]

Request Properties

Property Name	Type	Default	Required	Visible	Editable	Deletable	Searchable	Filterable
request_authentication	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_authenticate	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_logout	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_authentication	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_authenticate	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_logout	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Request Properties

Property Name	Type	Default	Required	Visible	Editable	Deletable	Searchable	Filterable
request_authentication	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_authenticate	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_logout	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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request_authenticate	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_logout	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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request_authenticate	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
request_logout	url	url	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



SAMPLE PAGES OF WORKFLOW DOCUMENTATION

— FULL NAVIGATION



File Home **Insert** Design Layout References Mailings Review View Developer Help

Cover Page Blank Page Page Break Table Pictures Shapes Icons 3D Models SmartArt Chart Screenshot Reuse Files Get Add-ins My Add-ins Wikipedia Online Video Link Bookmark Cross-reference

Navigation

Search document

Headings Pages Results

- Workflow Name: Approval Process
 - Workflow Properties
 - Variables
 - Defined Roles
 - Execution Properties
 - Assigned Activities
 - Revise and Resubmit
 - General
 - Participants
 - Deadline
 - Variables
 - Routing
 - Transitions
 - Execution Options
 - Role Setup
 - Approval Request
 - Review Request
 - Track Approval
 - Robots
 - Expression Robots
 - Internal Method Robots
 - Synch Robots
 - Timer Robots

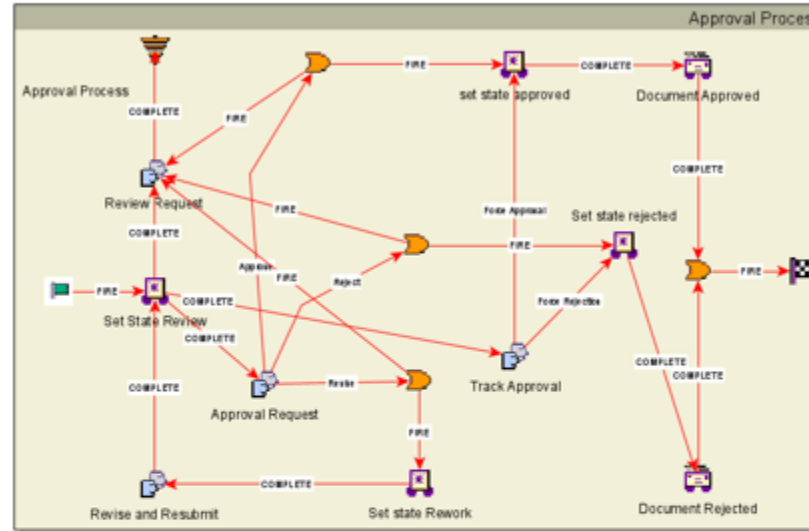
Workflow Name: Approval Process

Enabled: true
Category: DEFAULT
Responsible Role:
Description: This routing process allows the creator to select project team members to review and approve a document or part. All approvers are required to Approve# Reject or request a revision of the object.
Graphic: CONTENTS\approval_routing.gif



SAMPLE PAGES — CLEAN GRAPHIC

Workflow Name: Approval Process



Enabled: true

Category: DEFAULT

Responsible Role:

Description: This routing process allows the creator to select project team members to review and approve a document or part. All approvers are required to Approve# Reject or request a revision of the object.

Graphic: CONTENTS/approval_routing.gif



SAMPLE PAGES OF WORKFLOW DOCUMENTATION



Approval Request

General

name	Approval Request	X 200	Y 319	Obid 89626
category	DEFAULT			
Responsible Role				
description	This is an activity to approve a document or part that is routed for approval. @A document must be approved by all approvers before it is changed to the approved state.			
Activity	WfTask	<input type="checkbox"/>	Send Notification	
Template Format	HTML	<input checked="" type="checkbox"/>	Signing Required	
Template Name	null			
Instructions	You are a required approver for {primaryBusinessObject}. Enter comments in the field below# then select an option to Approve# Revise# or Reject. Complete this task when you have finished the review. \line\line{approve_instructions}			

Participants

Assignee	Type	Required
APPROVER	Role	<input checked="" type="checkbox"/> ALL0

Deadline

Set Deadline to	3 days,	0 hours,	0 minutes	from the start of the activity, or
	0 days,	0 hours,	0 minutes	from the start of the parent process
Overdue Consequences				
<input type="checkbox"/> Skip	<input type="checkbox"/> Mark Complete	<input type="checkbox"/> Reassign to the responsible role		
Overdue Notifications				
<input type="checkbox"/> Notify the selected roles	<input type="checkbox"/> Notify the responsible role			
	0 days,	0 hours,	0 minutes,	before the deadline
ASSIGNEE	<input type="checkbox"/> Notify the responsible role			
	0 days,	0 hours,	0 minutes,	after the deadline



SAMPLE DATA – ROUTING, ROUTING CRITERIA, AND TRANSITION CODE

Routing	
<input type="checkbox"/>	
Routing Type	MANUAL_EXCLUSIVE
Routing Events	Routing/Tallying Expression
Approve/Revise/Reject/	<pre>//Get the object that represents this activity WfAssignedActivity mySelf = ((WfAssignedActivity)self.getObject()); //Set result to "Reject" if it has been chosen by all of the required users. In all other cases# set result to "Revise" result = WfTally.all(self# "Reject"# "Revise"); if (result != "Reject") { //Set result to "Approve" if it has been chosen by all of the required users. In all other cases# set result to "Revise" result = WfTally.all(self# "Approve"# "Revise"); }</pre>
Transitions	
Transition:	Optional Condition for Transition: Suspend
Execution Options	



SAMPLE DATA – INCLUDES ROBOTS AND CODE

Connectors

routerType	routingEvents	autoRoutingExpression	function	type	Terminate Activities	threshold	X	Y	obid
NONE			OR	DEFAULT	true	0	586	218	89633
NONE			OR	DEFAULT	true	0	247	33	89634
NONE			OR	DEFAULT	true	0	337	316	89635
NONE			OR	DEFAULT	true	0	335	19	
NONE			AND	END	false	0	680	21	
NONE			AND	GROUND	false	0	102	21	
NONE			OR	START	false	0	16	23	

Robots

Expression Robots

Name	Category	Responsible Role	X	Y	obid
CreateAssociations	DEFAULT		1000	418	1068105
Description	null				
Expression	<pre> if(primaryBusinessObject instanceof com.ptc.qualitymanagement.audit.WTChangeAudit) { com.ptc.qualitymanagement.audit.AuditCommands.createAssociationsFromAuditDetails((com.ptc.qualitymanagement.audit.WTChangeAudit)primaryBusinessObject); } </pre>				

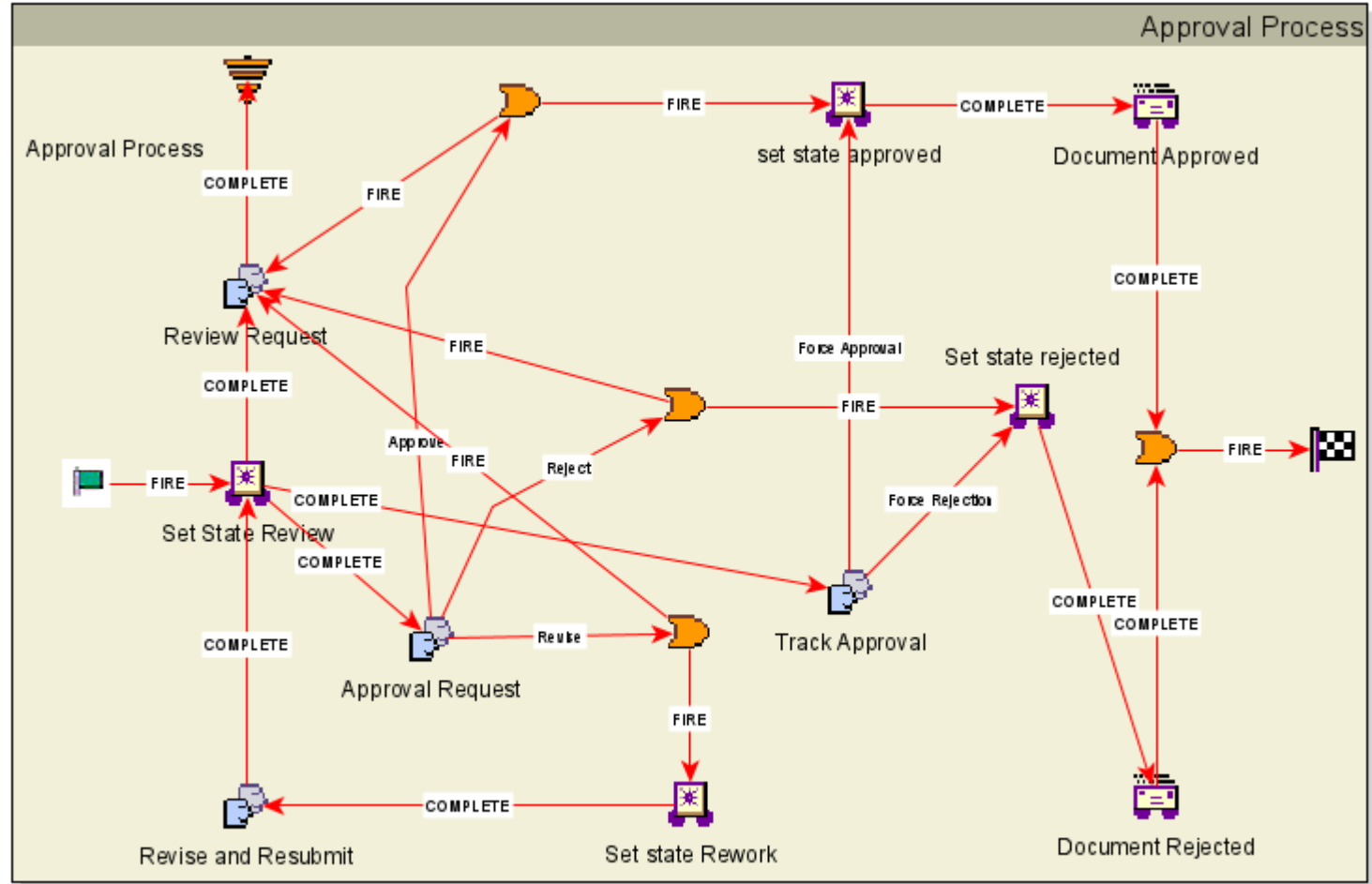
Internal Method Robots

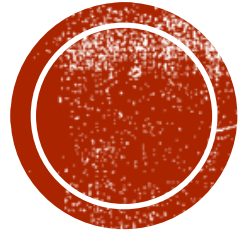
Name	Function	X	Y	obid
Set state Rework	setState	3		
Set State Review	setState	1		
Document Rejected	sendNotification	586	403	89615
set state approved	setState	422	34	89617
Set state rejected	setState	520	195	89619
Document Approved	sendNotification	586	35	89621



CUSTOM WORKFLOW OUTPUT THAT CAN BE TAILORED TO BETTER READ

Fix Route Overlap
Fix Overlap Text

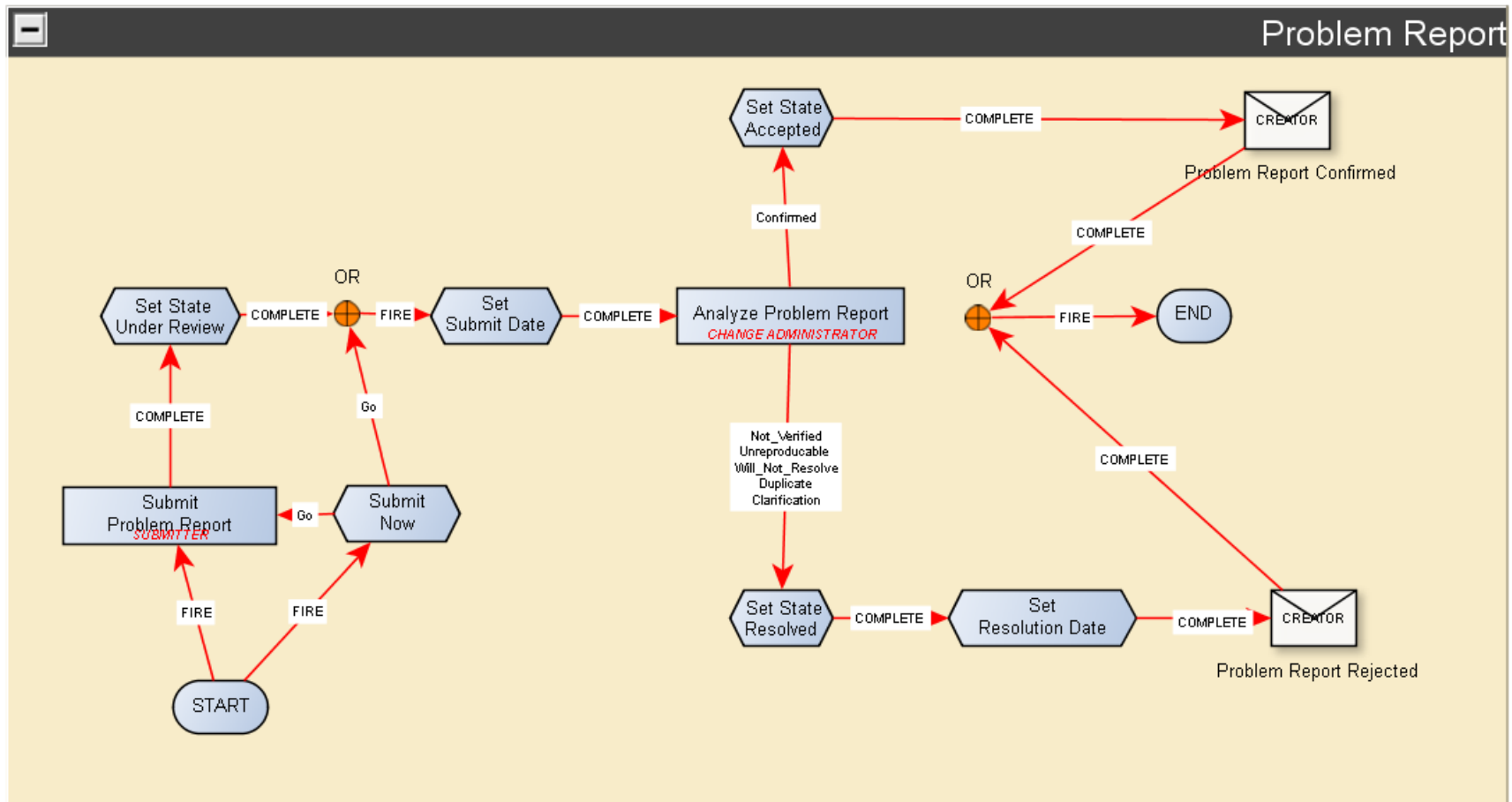




**ALSO AVAILABLE —
PRESENTATION READY
PROCESS DOCUMENTATION**

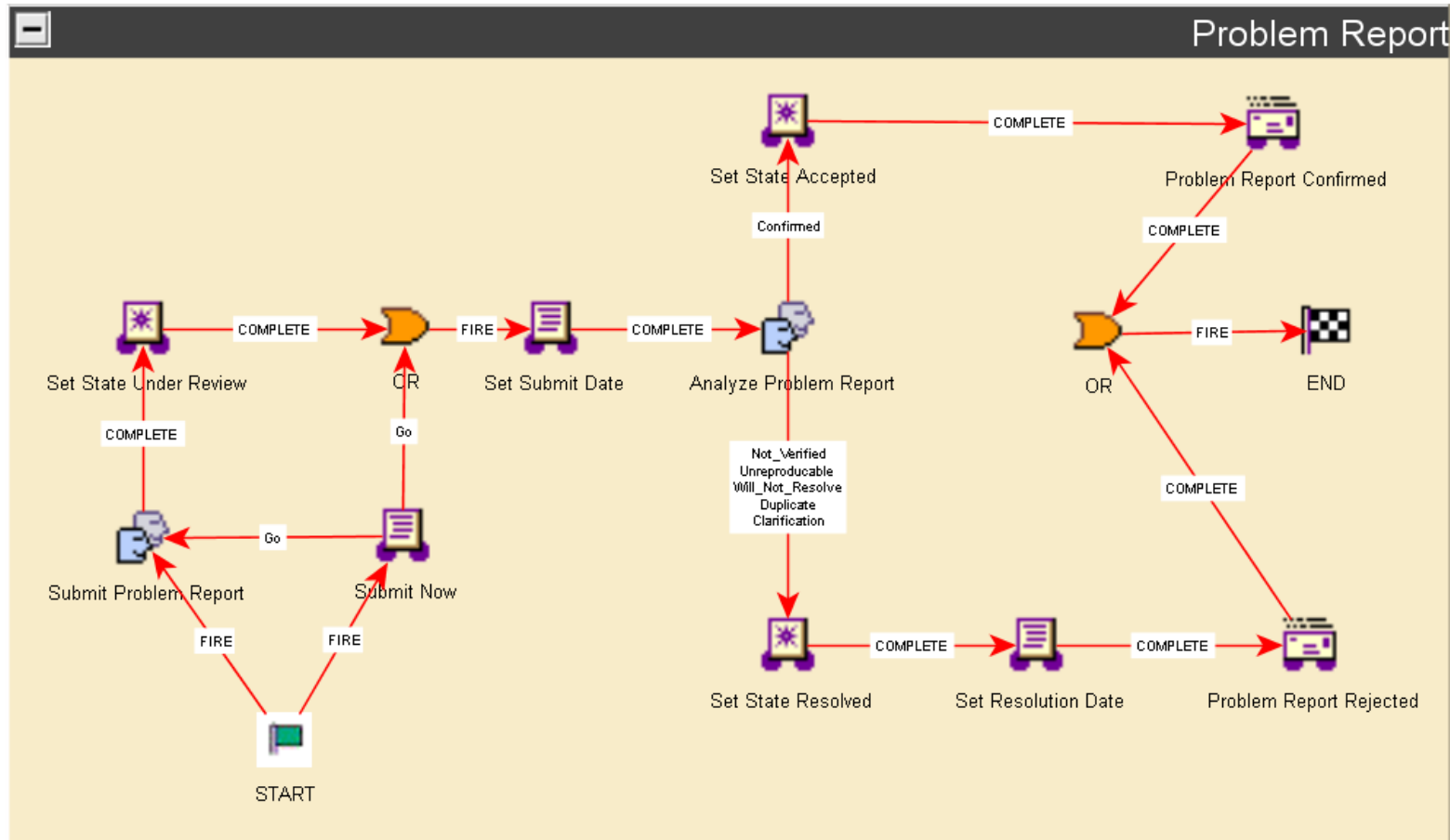
Provides Workflow View and/or Process Flow View

OOTB PROBLEM REPORT PROCESS



Name	Instructions	Assignee
Analyze Problem Report	Analyze the Problem Report. - Associate the relevant analysis information. - Determine the disposition of the Problem Report.	CHANGE ADMINISTRATOR I (role)
Submit Problem Report	Submit the Problem Report for review by the Change Administrator I.	SUBMITTER (role)





Name	Instructions	Assignee
Analyze Problem Report	Analyze the Problem Report. - Associate the relevant analysis information. - Determine the disposition of the Problem Report.	CHANGE ADMINISTRATOR I (role)
Submit Problem Report	Submit the Problem Report for review by the Change Administrator I.	SUBMITTER (role)

