

Use Case – Approve ProductDashboard Workflow Activity

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| Use Case Name: | Approve Workflow Activity |
| Iteration: | 1 |
| Summary: | There are many occasions where a user's only interaction with a PDM system is to act as an approver to a document in a formalized workflow process. This use case is will detail the scenario where the approver can use the ProductDashboard to quickly act upon a ProductCenter request to approve a document. |
| Preconditions: | <ol style="list-style-type: none"> 1. A ProductCenter workflow process has been initiated and an approval activity has been assigned to the approver. 2. The approver has configured a User Panel named "My Approvals" that contains an Object Table tied to a saved activity query that locates all activities that are active and assigned to the approver and have an activity name that includes approve. 3. The My Approvals panel has been personalized to include the Activity Details activity specific and an Approve ECO item specific report. |
| Basic Course of Events: | <ol style="list-style-type: none"> 1. The approver selects the hyperlink to get him to his personalized ProductDashboard. 2. The system prompts the user for his ProductCenter username and password. 3. The approver logs in. 4. The system presents the user with the My Approvals panel. 5. The approver selects one of the activities to which he has been assigned for approval. 6. The user selects the "Activity Details" report to understand the specifics of the activity. 7. The system launches the Activity Details Report for the selected activity in a new browser window. 8. The approver closes the report browser window and then selects the Approve ECO item specific report. 9. The system displays the custom report in a separate browser window, which includes a list of documents to review. 10. The approver selects hyperlinks for an attached document listed in the report. 11. The system opens the file for viewing in a separate browser window. 12. The approver dismisses the two additional browser windows. 13. The approver selects the Send Forward function to complete this assignment. 14. The system prompts the approver for his username and password, allowing also for a comment. 15. The approver enters his user name and password and selects OK. 16. The system completes the assignment and refreshes the user's object table. |
| Exception Paths: | <ol style="list-style-type: none"> 1. |
| Assumptions: | <ol style="list-style-type: none"> 1. (Step 10) The ability to open documents within the Approve ECO report is a function of the custom style sheet for the report. |
| Post Conditions | <ol style="list-style-type: none"> 1. The workflow process is updated to reflect that the user's assignment has been completed. |
| Issues: | <ol style="list-style-type: none"> 1. (Step 8) Can the user select an item specific report to run against a selected activity where the attachment would be the root item in the report? |
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