

# Workflow Headers and Versioning

28/02/2025 12:29 pm GMT

Relates to version

Tags: [Workflow](#) 8.2

The workflow defines what sequence of operations must be executed to manufacture a product. A workflow consists of a header and versions. The workflow version is where you design the flow of work to complete a business process such as manufacture a product.

To create a new workflow, you must already have configured:

- Line Type
- Line Config

## Create a Workflow Type

Workflows belong to a Workflow Type which defines the class of the workflow and the degree of change control to be applied. Controlled workflows provide stricter validation and require approval for changes, while non-controlled workflows offer greater flexibility and reduced admin when strict control is not required. The following instructions show you how to create a new Workflow Type:

1. Navigate to the **Workflow Types** page and click **Add**.
2. Complete the **Add Workflow Type** input screen.

### Add/Edit Workflow Type input screen

The following properties can be defined for Add/Edit Workflow Type:

*Blue fields in the form are required and are flagged with an asterisk (\*) in this document.*

- **Name\***: The name of the workflow type.
- **Description\***: A description of the workflow type.
- **Controlled\***: Select the level of control from the dropdown. Values: *Yes*, *No*. For more information on controlled and non-controlled workflow versions, see [Approval Processes](#).
- **Class\***: The workflow class. Values:
  - *Product-specific*: Workflows that apply to a single product.
  - *Shared*: Workflows that are used for multiple products when they share common processes.
  - *Template*: These workflows serve as a base for creating product-specific workflows.
- **Approval Signature Required\***: Set to *Yes* if an approval signature is required to up-version workflows of this type.
- **Permission Category**: The category selection in this field determines what is in the drop down in the **Approval Permission** field below.
- **Approval Permission\***: The permission required to approve a workflow version.

## Workflow Header

When you create a new workflow, you are creating a workflow header and the first version of that workflow. The header defines what type of workflow it is and therefore what level of control will apply to all versions of that workflow.

### Create a New Workflow

1. Navigate to the **Workflows** page and click **New Workflow**.
2. Complete the **New Workflow** input screen.

## New Workflow input screen

The following properties can be defined for New Workflow:

*Blue fields in the form are required and are flagged with an asterisk (\*) in this document.*

- **Workflow Type\***: Select the **Workflow Type** from the drop-down list. If a *Product Specific Workflow Type* is selected, input fields will be displayed at the bottom of the form where you can search and select a product from the drop-down list.
- **Name\***: The name of the workflow.
- **Description**: A description for the workflow.
- **SUID**
- **Save & Close button**: Creates the workflow without creating an initial version. To see the workflow that you saved and closed in the list of workflows, you will need to remove all the statuses in the **Status** search field. To create a version for this workflow, you will select it in the **Workflow** screen and click the **New Workflow Version** button.

Usually, you would click the *Proceed to Create 1st Version* button when you create a new workflow.

- **Proceed to Create 1st Version**: The **New Workflow Version** screen is displayed.

## Header History

The **Workflow Header History** page tracks changes that were made to the selected workflow header.

## Workflow version

Workflows are versionable to support change control. You can have multiple versions of a workflow. Each of these versions contain detailed design information as described below and have their own approval status. Workflow versions are connected to a product through a recipe.

## Major and Minor Workflow Versions

Workflows have a major and minor version. Minor up-versions can be used to minimise approval admin where a change does not change the version of the finished good being produced or require an associated change to the BoM/recipe. For example, to update instruction text to improve clarity, without changing the method of manufacture.

Major versions can be used to enforce broader recipe and BoM approval for changes that change the version of the finished product or require broader changes to BoMs. For example, to change a process to sub-contract an element of manufacturing would need a change to both BoMs and workflow.

## Create a workflow version

### New Workflow Version input screen

The following properties can be defined for New Workflow Version:

*Blue fields in the form are required and are flagged with an asterisk (\*) in this document.*

- **Planning Mode\***: Select a planning mode from the drop down. Values:
  - *Do not plan*: Tasks for this workflow will be excluded from advanced planning and scheduling analysis.
  - *Plan by Job and Child Tasks*: Tasks for this workflow will be included in advanced planning and scheduling analysis. Where the workflow is for a scheduled job, a single task will be planned for each operation. Where the workflow is for a sub-task (for example rework) a task will be planned for each instance of rework.
- **Batch Append\***: This option controls whether it is possible to start additional quantity for an existing WIP item. For example, if you start a batch of 100, and then scrap 5, are you able to start an additional 5 for the same batch/serial number. Values:
  - *Allowed to append to batch*.

- *Cannot append to batch.*
- **Recovery Mode\***: The recovery mode to apply to this workflow. Recoveries are earned when an operation is completed in entirety. The recoveries are credited to all users who booked activity to the operation in proportion to the actual hours booked, regardless of who recorded the completion.
- **Line Config\***: Select a line configuration from the drop-down list.
- SUID
- **Change Reference**: The reference number associated with the change.
- **Save & Close**: Creates a new version of the workflow.
- **Proceed to Create Recipe**: To display the **Create Recipe** screen.

After you created the workflow version, you can proceed to [designing the workflow](#).

## Version History

The **Version Revision History** page tracks changes that were made to the selected workflow version.

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