Workflow status

Quick Guide

A WORLD IN WHICH PRODUCTS CAN BE TRUSTED

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1 Introduction to workflow status (WFS)

The process of creating a technical file can be made transparent using a workflow. This involves recording the steps, time duration, and identifying who is responsible for each step. This provides a quick overview of the procedure and the work that needs to be done.

Purpose:
To ensure proper tracking of the different steps involved in creating a technical file (TCF), you can use a workflow to keep things organized. By using a workflow status, you can easily determine which stage the workflow is currently in and whether any action is needed.

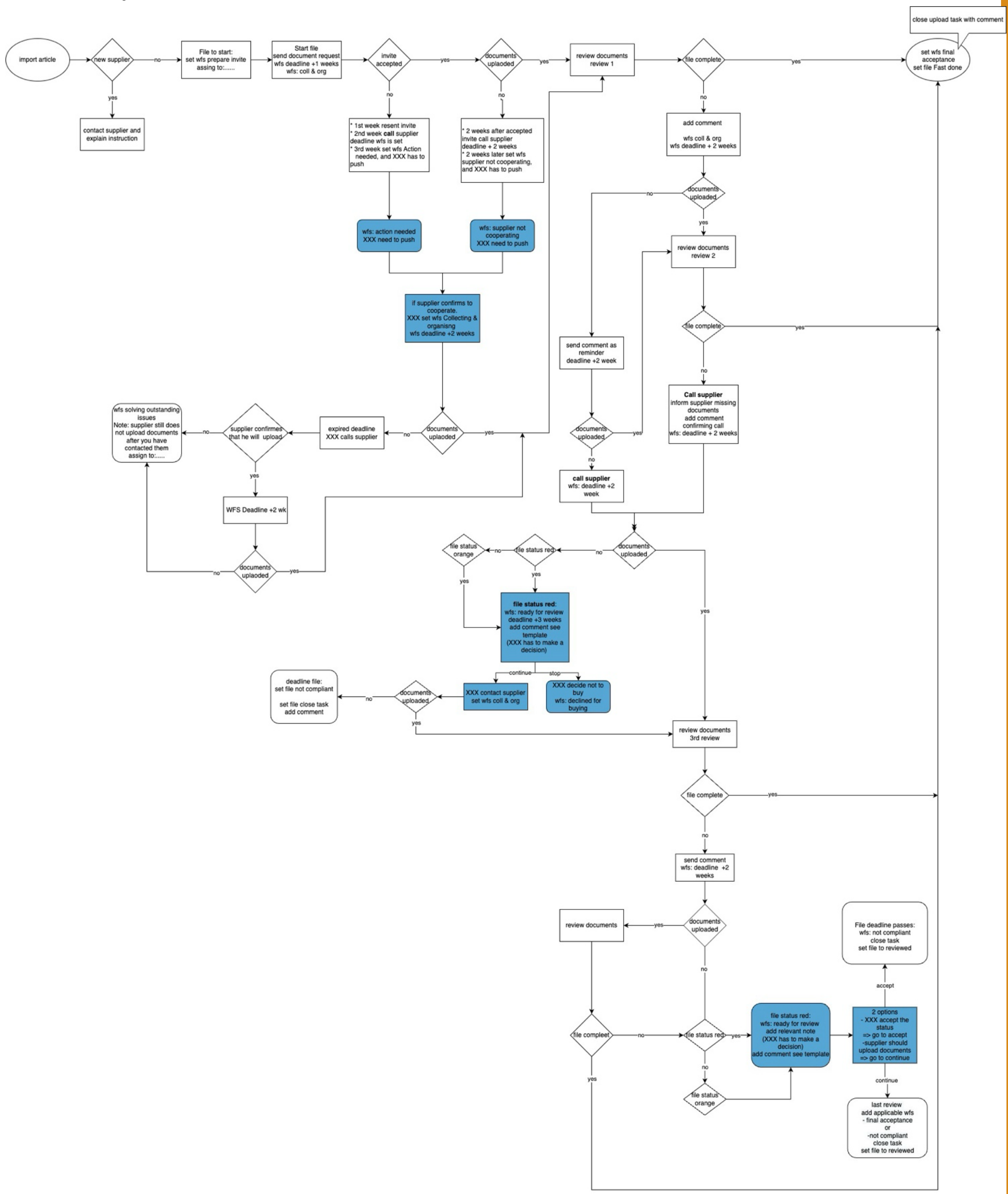
When to use:
The WFS allows one to monitor the status of the file, and perform the actions associated with it.

You can use this status for yourself, but if you work with others or need help from a colleague, you can assign the WFS to someone. This colleague will receive an email. You can also add a note to the status so that the question or action is immediately clear.

Advantage:
In addition, a deadline can be added, allowing follow-up to be monitored.
Also, the WFS is information that can be used in case of a reorder.
Based on the WFS, you can then decide whether a new file should be created or just an update to the existing file.

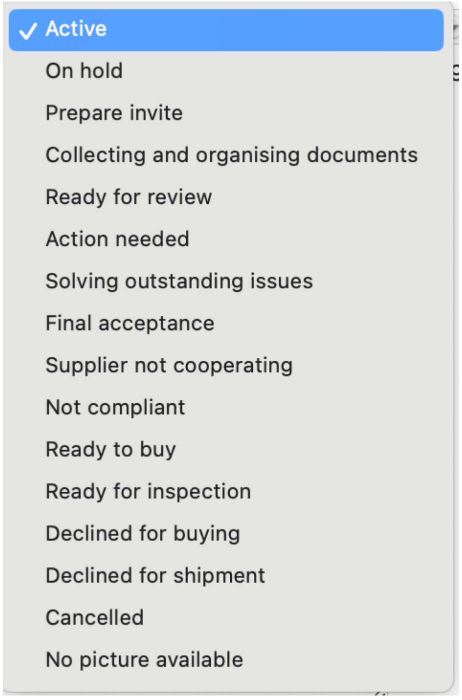
Below is an example of a comprehensive flow chart.
(Some steps have been merged into 1 block to keep it readable and compact)

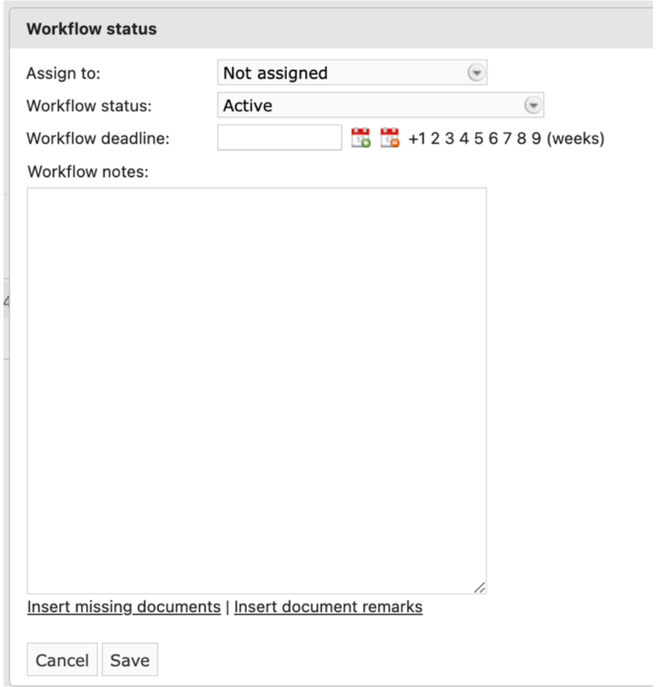
1.1 Example of a flowchart



1.2 Workflow status (WFS):

There are 16 predefined workflows available, and one can assign the status to a colleague. This colleague should be added to the account as a user. Those to whom the workflow is assigned will also receive an email.





We advise establishing a clear definition for when to use WFS, ensuring a consistent protocol for all account users.
Below, you will find an example of how you can use the different WFS.

Work flow status (WFS)	When	Which Action
Active	Article information is imported	Start the workflow
No picture available	Picture is missing	Collect picture
Prepare invite	File is ready to be started	Activate file, and send the document request
Solving outstanding issues	To park a file, first the issue should be solved	Solve issue
Collecting & organising	Working on the file	Send document request, monitoring if request is accepted, if not after 1 week resent invite, still not accepted, after 1 week call supplier once documents are uploaded, review documents inform and push supplier for missing documents
Action needed	Supplier has not accepted the request to upload documents. Request is sent again, called supplier to push to accept the invite. But request is still pending	The one working on the file needs help and escalate to e.g. buying department. The buyer should contact the supplier, and push to accept the request and upload the documents(1)
Supplier not cooperating	Supplier has accepted invite, but upload no documents	The one working on the file needs help and escalate to e.g. buying department. The buyer should contact the supplier, and push to accept the request and upload the documents(1)
Ready for review	Supplier has indicated that he will not provide any more documents, but the file is not complete, file status is Red / Orange	The file has to be escallated to the person who can make a decission about this. If the file status is accepted, the file can be closed. Or the supplier has to be pushed to upload the missing documents.
On hold	Working on the file needs to be paused	Add WFS deadline when file needs to followed up
Not compliant*	File is not complete, but status accepted for this batch	Closes task / task
Final acceptance*	File is compleet	Closes Task / file

Ready to buy*	File is complete	Closes Task / file
Declined for shipment*	File is not complete	Closes Task / file
Declined for buying*	File is not complete	Closes Task / file
Cancelled*	Working on the file is no longer required	Closes Task / file

* Work on the technical file has been completed.

(1) The one working on the file needs help and escalate to e.g. buying department. The buyer should contact the supplier, and push to accept the request and upload the documents.

In the scenario where the individual working on the technical file requires assistance and needs to escalate the issue to the buying department, it’s important to have a clear and efficient process in place.

The person can update the Workflow Status (WFS) to reflect the need for escalation and then assign this updated status to a colleague within the buying department. This assignment can be done within the system, ensuring that the assigned buyer is promptly notified via email about their new responsibility. Upon receiving the notification, the buyer is then tasked with contacting the supplier directly.

The conversation with the supplier should focus on emphasizing the importance of the request, the need for timely compliance, and the urgency of uploading the required documents. The buyer can use the notes added to the WFS as a guide for the discussion points and the specific actions that need to be taken by the supplier.

This structured approach not only facilitates clear communication between the internal team members and the supplier but also allows for tracking the progress of the request through the updated WFS.

Monitoring the deadline set in the WFS ensures that the follow-up actions are timely and that any delays are quickly addressed. This process is critical in maintaining the efficiency and effectiveness of the workflow, ensuring that all steps are completed as needed, and minimizing the potential for project delays.

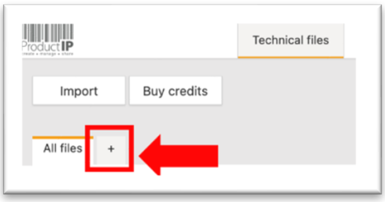
2 How to keep track

2.1 Create tabs

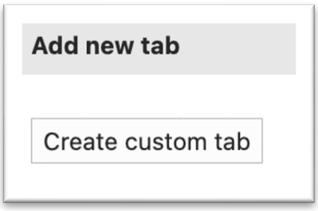
Organize your tasks effectively by using tabs to create detailed overviews and 'TO DO' lists.

On the Technical Files page:

1. Click on the "+"

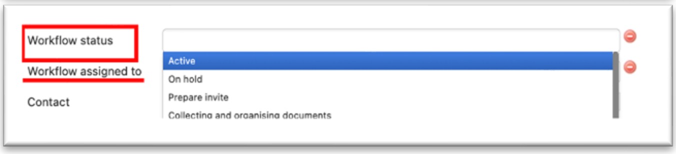


2. Click "Create custom tab"



3. Add "Tab name"

4. Select the WFS you need to create the overview for. You can select multiple statuses.



5. Optional you can select "assigned to me" and you will only see the files with that WFS assigned to you

2.2 Reporting

These workflow statuses can be utilized for vendor-level reporting. When the correct WFS is added at file closure, one can create an overview of the number of files with the corresponding status per supplier.