Workflows

Onboarding Guide

A key part of collaborative capabilities is the support for process-based Workflows, which tightly guide an organization's designers through typical, everyday design processes including Part Requests, Project Creations, and project activities like Design Reviews and Publishing to PLM.

Workspaces include predefined activated Workflows and Workflow Sample Templates. Sample Workflow Templates can be used as is or edited and customized. New Workflows can be created from scratch.

Getting Started

ONBOARDING OBJECTIVES	RESOURCE
Activate your Altium 365 Workspace	📄 Documentation Article
Activate a Workflow	📄 Documentation Article
Initiate a Process	📄 Documentation Article
Complete a Process	📄 Documentation Article

Best Practices

- Activate only the Workflows that are intended to be used. Deactivate all Workflows that should not be used, including sample templates.
- Thoroughly test all Workflows before distributing them.
- Share details about Workflows with Workspace Members so they understand how and when to use them.

Additional Resources

HOW TO GET HELP	ADDITIONAL RESOURCES
⊗ Altium Support	📄 Documentation: Creating & Managing Processes
🚀 Ask an Expert Sessions	📄 Documentation: Defining a Process Workflow
🔗 Altium Learning Hub	📄 Documentation: Working with Tasks
	🎓 Altium 365 Training