
SOP Number:	5
SOP Title:	Change Control Workflow Current Enquiry
Version:	1.0
Date Created:	13/11/2023
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1. INTRODUCTION

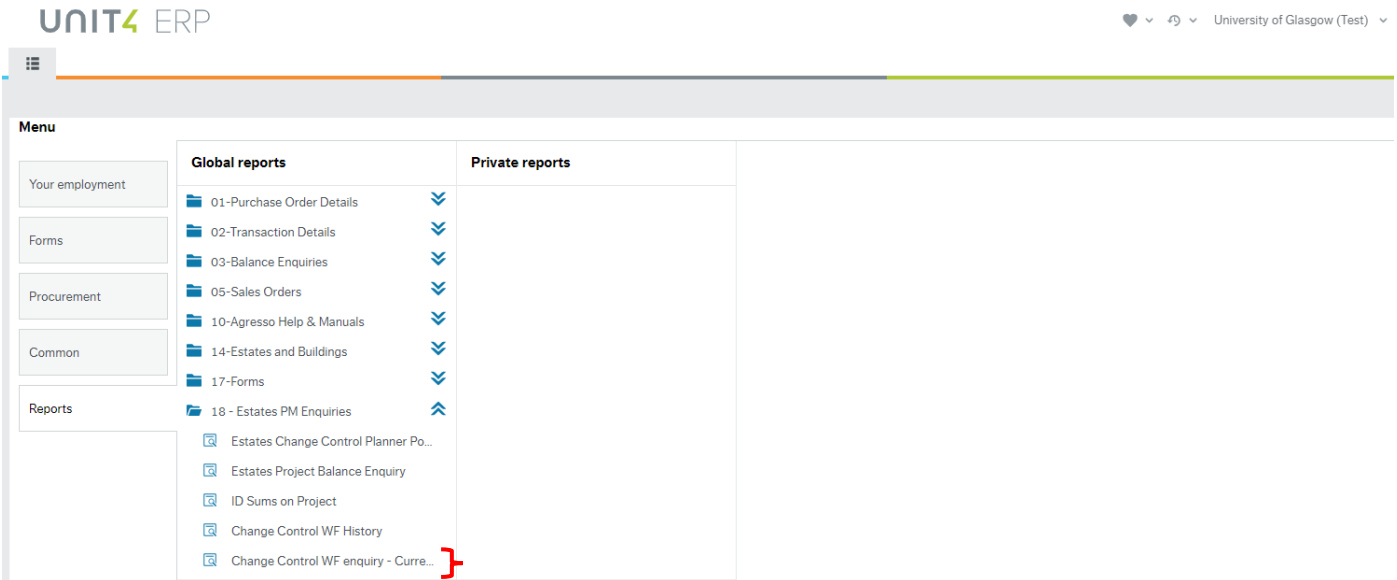
The Change Control Workflow History Enquiry has been created to give the user visibility and control of checking the view of their current or historic change controls and see where in the workflow process it is (who it is sitting with for approval)

2. PURPOSE

The purpose of this enquiry is to allow the user to check on the status of their change control form at any given time via the enquiry. The enquiry was created to provide the level of detail they require when searching for their change control form workflow route. This level of detail provided by the enquiry allows the user to have full information of what different phases their change control has gone through and who it is currently sitting with for approval along with comments from their approver or rejector.

3. CHANGE CONTROL WF HISTORY ENQUIRY

When logged into Agresso, click on the 'Reports' option on the left-hand side, then open folder '18 – Estates PM Enquiries', then select the 'Change Control WF enquiry - Current' report.



Once the report has been opened, the below screen will appear:

The screenshot shows the 'Change Control WF enquiry - Current Step' report interface. It features a 'Selection criteria' section with search filters for 'Form ID like', 'Sub-Project like', 'Form WF Status like', 'Current WF Step Task User like', and 'Company like' (set to P1). Below this is a 'Results' section with a table and a 'Search' button. The table has columns: '#', 'Form ID', 'Form Description', 'Sub-Project', 'Sub-Project Description', 'Change Amount', 'Current Workflow Step', 'Form WF Status', and 'Current WF Step Task User'. The table is currently empty. There are four callout boxes with arrows pointing to the search filters:

- Top right: 'You can search via Form ID' (points to 'Form ID like')
- Middle right: 'You can search via Sub-Project number' (points to 'Sub-Project like')
- Bottom right: 'User can search via Form WF Status, this shows every change control that is 'Finished', 'Draft' or 'Working' (still making its way through workflow approval). - This depends on what the user searches for' (points to 'Form WF Status like')
- Bottom center: 'User can search via Current WF Step Task User, this is for the user to see what tasks are sitting with a specific person. This depends on who the user searches for.' (points to 'Current WF Step Task User like')

At the bottom right of the interface, it says 'Time executed 13/11/2023 11:48:33' and 'Number of rows 0'.

- Search via Sub-Project (the easiest and quickest way to check)

Change Control WF enquiry - Current Step

Selection criteria

Form ID like: ...

Sub-Project like: ...

Form WF Status like:

Current WF Step Task User like:

Company like: P1

Results

Search

#	Form ID	Form Description	Sub-Project	Sub-Project Description	Change Amount	Current Workflow Step	Form WF Status	Current WF Step Task User
1	EBC1000000	test data	200760-01	GILMOREHILL / LIBRARY ANNEX / EXTERNAL FABRI...	0.00		FINISHED	
2	EBC1000001	re-test	200760-01	GILMOREHILL / LIBRARY ANNEX / EXTERNAL FABRI...	601,200.00		FINISHED	
3	EBC1000002	Underfloor Heating	200760-01	GILMOREHILL / LIBRARY ANNEX / EXTERNAL FABRI...	46,200.00		FINISHED	
4	EBC1000004	Test Doc Archive	200760-01	GILMOREHILL / LIBRARY ANNEX / EXTERNAL FABRI...	60,000.00		DRAFT	
5	EBC1000010	CE18 Window refurb	200760-01	GILMOREHILL / LIBRARY ANNEX / EXTERNAL FABRI...	6,000.00		FINISHED	
6	EBC1000013	Scaffold Design Fees	200760-01	GILMOREHILL / LIBRARY ANNEX / EXTERNAL FABRI...	27,600.00	Head of Projects Appro...	WORKING	Sharon De Sykes
7	EBC1000015	Painting of lecture roo...	200760-01	GILMOREHILL / LIBRARY ANNEX / EXTERNAL FABRI...	19,200.00		FINISHED	
Σ					760,200.00			

Time executed 24/10/2023 10:49:58 Number of rows 7

Form ID to identify each different change control

This field shows any comments that have been added to the approval or rejection

This field shows the current status of the change control form

This field shows the current status of who the form is sitting with