

Promotion Wizard – Step 1

Create and edit
Promotion Request Create Default Type WCTYPE|wt.maturity.PromotionNotice
Object... and Out... Yes

Promotion type defined by preference

Not sure what defines the default name string
OIR determines if visible and if it can be edited

New Promotion Request

1 Set Attributes 2 Select Promotion Objects 3 Select Participants

Product: Hydra
*Type: Promotion Request

Attributes

*Name: 4000-1005, Spring-OPRV, 4000-1005, SPRING-OPRV.CATPART, 1.1, 02/04/20

Description:

*Location:

Autoselect Folder (/Hydra/Windchill Objects/Promotion Notices)
 Select Folder (/Hydra/CAD Docs and Parts/4000)

Apply default collection:

* Indicates required fields.

Back Next Finish Cancel

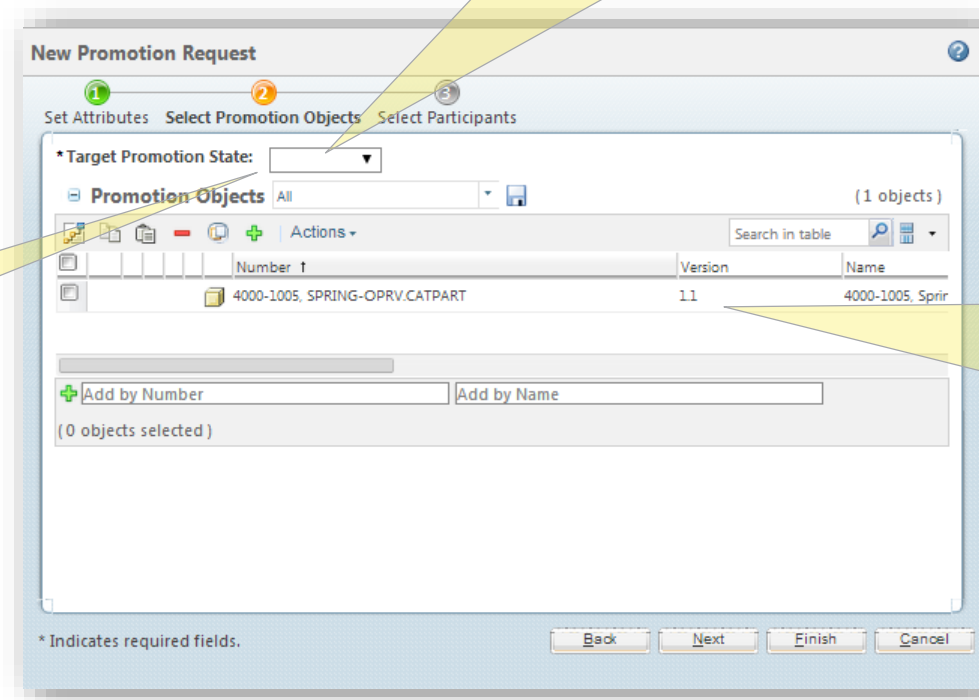
Toggle default defined by preference

Default folder and ability to manually set folder is defined by OIR. Currently we put promotions into the /Promotions folder, but allow user to choose a different folder. We can remove this option and hide location section on the wizard.

Default for the Apply Default Collection Check... Yes

Promotion Wizard – Step 2

Promotion target states (as defined in LC templates) for all objects in collection are shown here in drop down. If only one then it's preselected. There must be at least one valid target promotion state for each item marked for promotion or the user cannot proceed to step 3



New Promotion Request

1 Set Attributes 2 Select Promotion Objects 3 Select Participants

*Target Promotion State:

Promotion Objects: All (1 objects)

Number	Version	Name
4000-1005, SPRING-OPRV.CATPART	1.1	4000-1005, Sprir

+ Add by Number Add by Name

(0 objects selected)

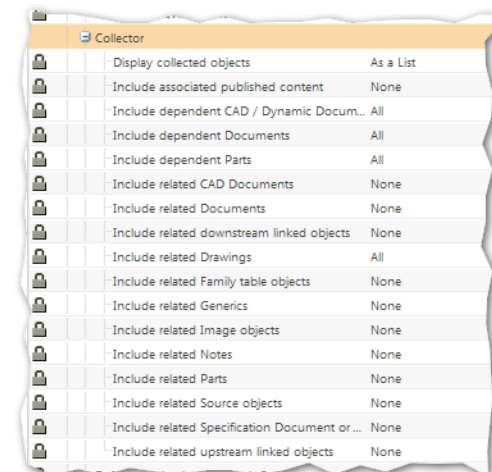
* Indicates required fields.

Back Next Finish Cancel

The selected state then determines which process will be available on the next step. This based on the process/state mapping in preferences.

- Workflows when promoting to APPROVED
- Workflows when promoting to CANCELLED
- Workflows when promoting to CHECKED
- Workflows when promoting to OBSOLETE
- Workflows when promoting to PRODUCTI...
- Workflows when promoting to RELEASED
- Workflows when promoting to WIP

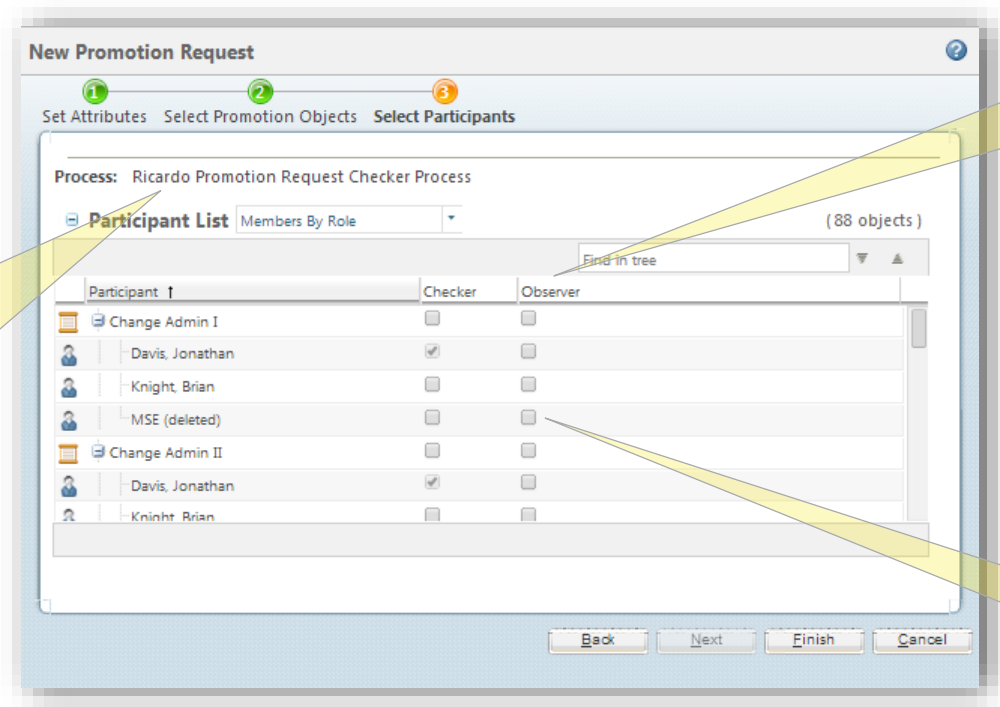
Default collection rules define in preferences. Assuming we have content link automatically created between drawing and part, then default collection rule should always give the desired results. Nothing to stop the user changing that unless we implement custom UI validation



Rule Name	Value
Display collected objects	As a List
Include associated published content	None
Include dependent CAD / Dynamic Docum...	All
Include dependent Documents	All
Include dependent Parts	All
Include related CAD Documents	None
Include related Documents	None
Include related downstream linked objects	None
Include related Drawings	All
Include related Family table objects	None
Include related Generics	None
Include related Image objects	None
Include related Notes	None
Include related Parts	None
Include related Source objects	None
Include related Specification Document or ...	None
Include related upstream linked objects	None

By having unique promotion target states name in the lifecycles of each object type we can ensure that only one type of object is promoted at once. For example we don't wish to allow CAD Documents and Reference Document to be promoted together as they have different process requirements.

Promotion Wizard – Step 3



The selected target state in the previous step in conjunction with the process/state mapping preferences presents a list of available workflow processes in a pull down. If there is only one available process then it is pre-selected..

All the roles used in the selected Workflow process then appear at the top of the participants list table. To allow people to be assigned to those roles by the promotion creator.

- Workflows when promoting to APPROVED
- Workflows when promoting to CANCELLED
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- Workflows when promoting to WIP

It is optionally possible to automatically populate the participants by mapping a process role to a container team role using a preference

The promotion lifecycle does not have a workflow directly mapped as with change object workflows. A workflow is selected during the create of the promotion notice

Fixed Roles For Promote APPROVER=PROMOTION APPROVERS|REVIEWER=PRO...

APPROVER=PROMOTION APPROVERS
 REVIEWER=PROMOTION REVIEWERS
 CHECKER=CHECKER
 CHIEF DESIGNER=CHIEF DESIGNER
 CHIEF ENGINEER=CHIEF ENGINEER