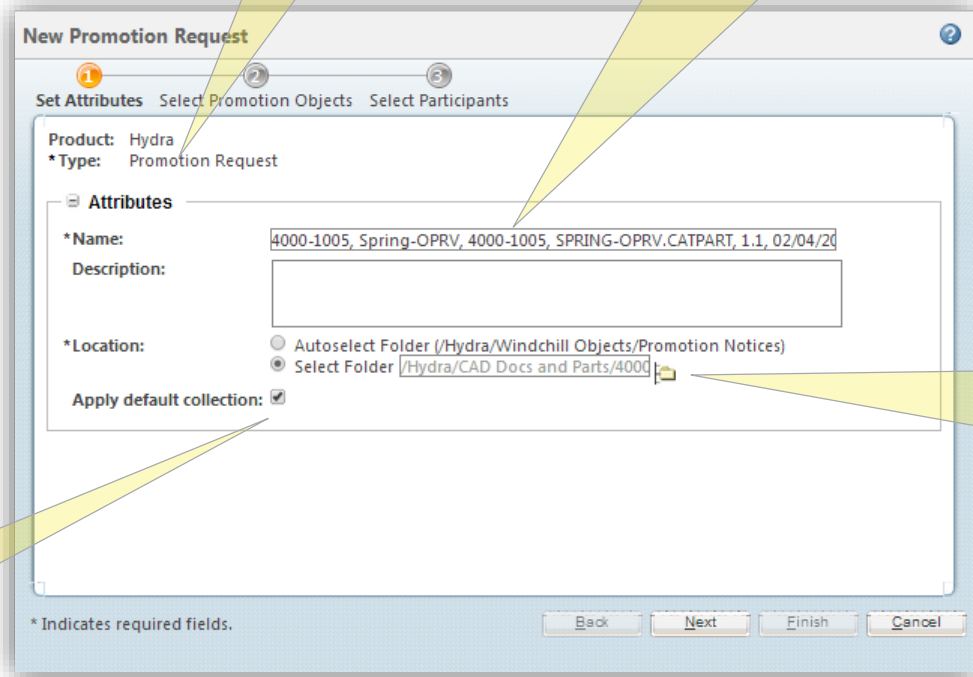


Promotion Wizard – Step 1



The screenshot shows the 'New Promotion Request' wizard, Step 1: Set Attributes. The interface includes the following elements:

- Product:** Hydra
- *Type:** Promotion Request
- Attributes:**
 - *Name:** 4000-1005, Spring-OPRV, 4000-1005, SPRING-OPRV.CATPART, 1.1, 02/04/20
 - Description:** (Empty text box)
 - *Location:**
 - Autoselect Folder (/Hydra/Windchill Objects/Promotion Notices)
 - Select Folder (/Hydra/CAD Docs and Parts/4000)
 - Apply default collection:**

Callouts and preferences are as follows:

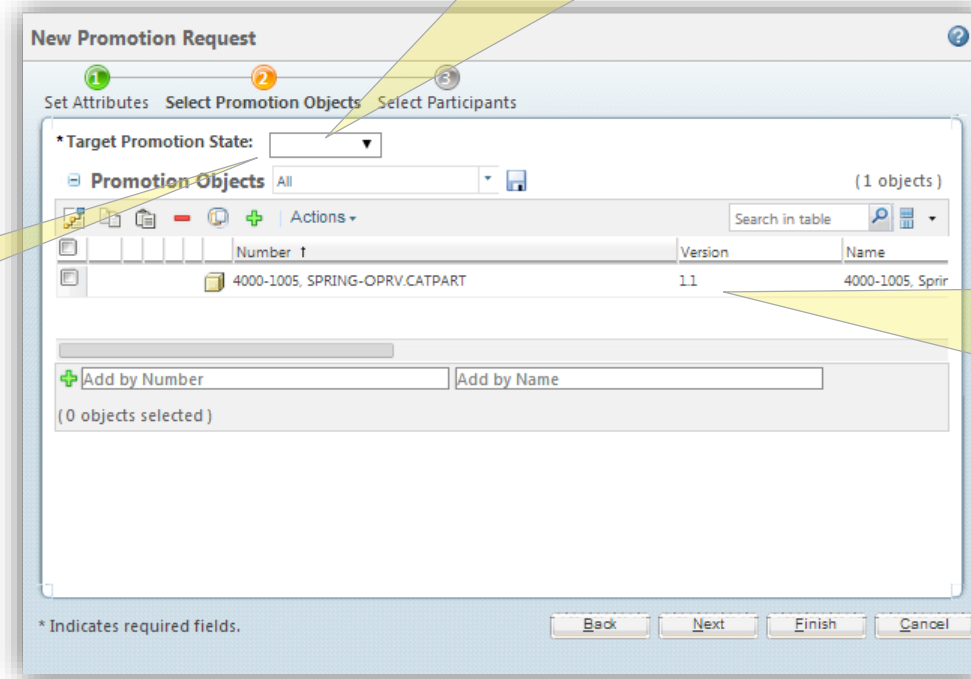
- Promotion type defined by preference:** Points to the *Type field.
- Default name generated:** Points to the *Name field.
- Default folder and ability to manually set folder is defined by OIR. Currently we put promotions into the /Promotions folder, but allow user to choose a different folder. We can remove this option and hide location section on the wizard.** Points to the *Location radio buttons.
- Toggle default defined by preference:** Points to the 'Apply default collection' checkbox.

Additional preferences shown in the background:

- Promotion Request Create Default Type: WCTYPE|wt.maturity.PromotionNotice
- 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)

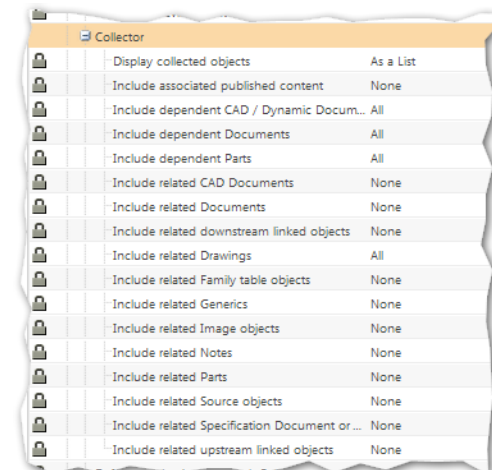
* Indicates required fields.

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 PRODUCTL...
- Workflows when promoting to RELEASED
- Workflows when promoting to WIP

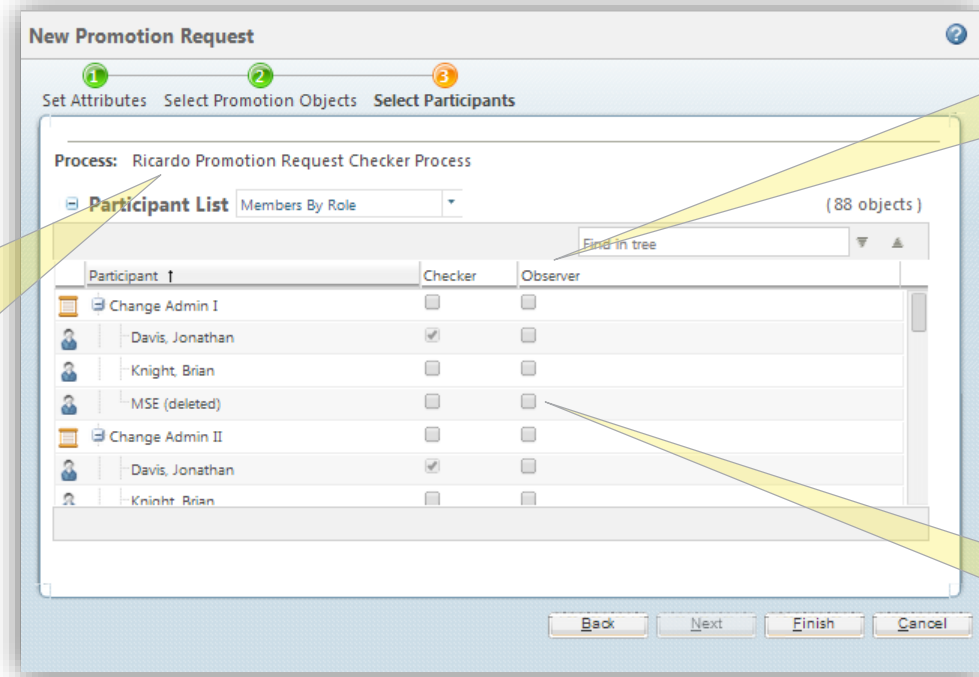
Default collection rules define in preferences. Assuming we have content link automatically created between drawing and part, then default collection rule should always give the desired results. Nothing to stop the user changing that unless we implement custom UI validation



Collector	Display collected objects	As a List
<input type="checkbox"/>	Include associated published content	None
<input type="checkbox"/>	Include dependent CAD / Dynamic Docum...	All
<input type="checkbox"/>	Include dependent Documents	All
<input type="checkbox"/>	Include dependent Parts	All
<input type="checkbox"/>	Include related CAD Documents	None
<input type="checkbox"/>	Include related Documents	None
<input type="checkbox"/>	Include related downstream linked objects	None
<input type="checkbox"/>	Include related Drawings	All
<input type="checkbox"/>	Include related Family table objects	None
<input type="checkbox"/>	Include related Generics	None
<input type="checkbox"/>	Include related Image objects	None
<input type="checkbox"/>	Include related Notes	None
<input type="checkbox"/>	Include related Parts	None
<input type="checkbox"/>	Include related Source objects	None
<input type="checkbox"/>	Include related Specification Document or ...	None
<input type="checkbox"/>	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
- Workflows when promoting to CHECKED
- Workflows when promoting to OBSOLETE
- Workflows when promoting to PRODUCTL...
- Workflows when promoting to RELEASED
- 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

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

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

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