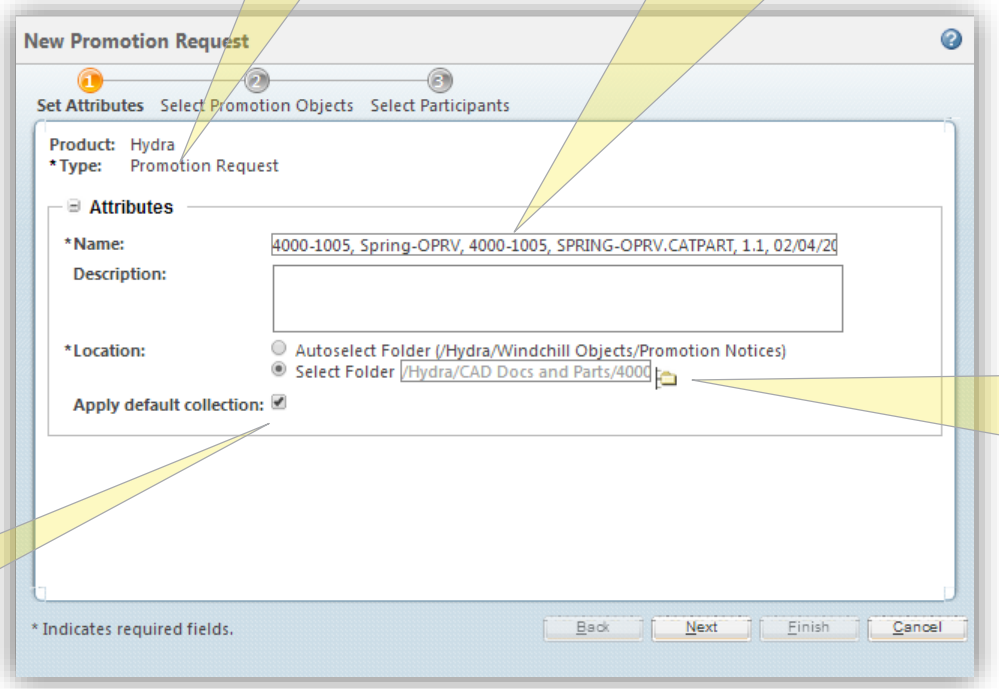
Promotion Wizard – Step 1

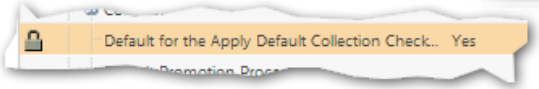
Promotion type defined by preference

Default name generated



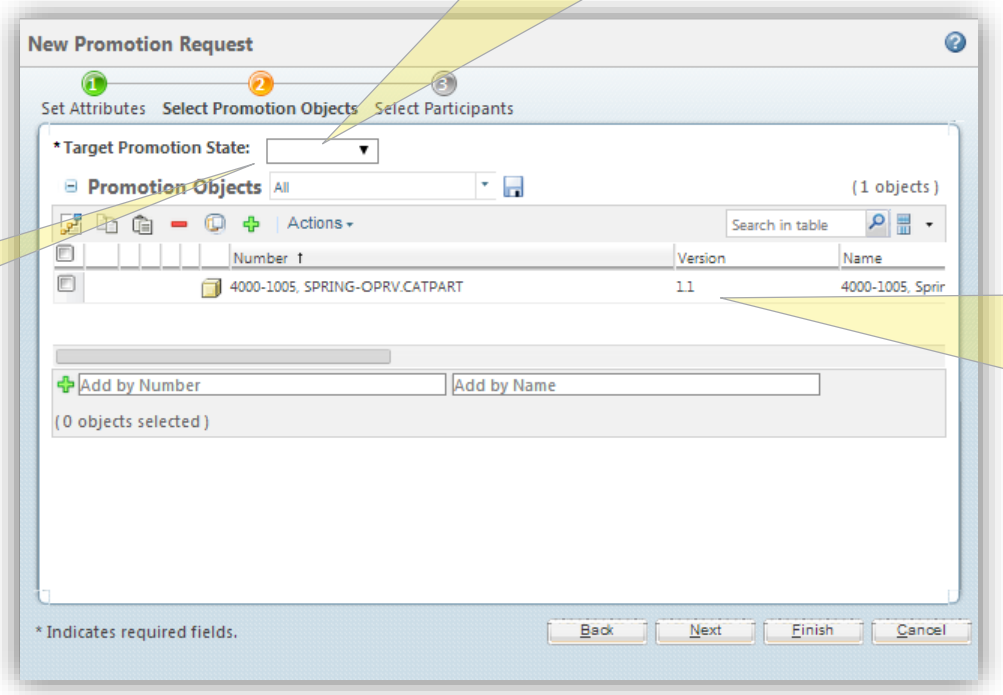
Default folder and ability to manually set folder is defined by OIR. Currently we put promotions into the /Promotions folder, but allow user to choose a different folder. We can remove this option and hide location section on the wizard.

Toggle default defined by preference



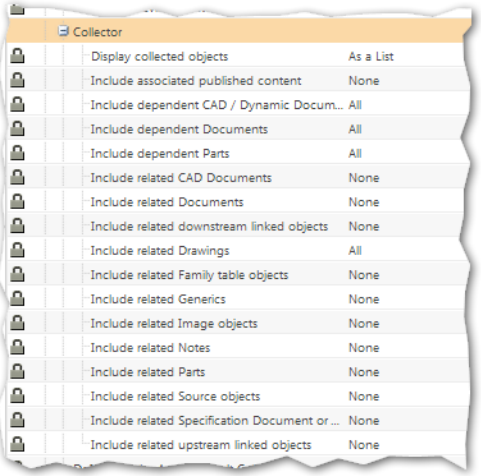
Promotion Wizard – Step 2

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



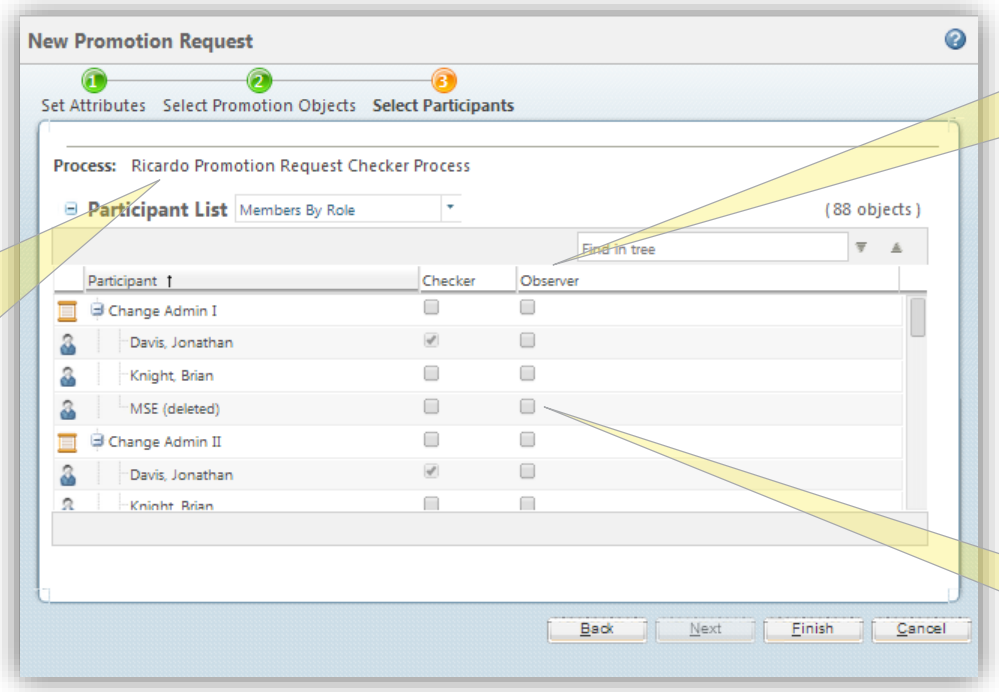
The selected state then determines which process will be available on the next step. This based on the process/state mapping in preferences.

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



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.

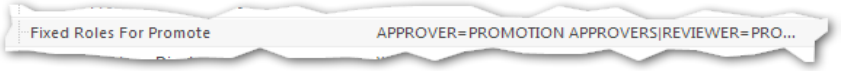
Promotion Wizard – Step 3



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.

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..

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

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