Review

Windchill 11.0 introduced a new object type, Review. It has two subtypes, Design Review and Peer Review. These objects are added to Windchill along with their required components during the upgrade process.

The following table defines the matching components for each Review type.

	Identifier	Design Review	Peer Review	Implementation
Container Roles		- Approver - Review Creator - Review Manager - Reviewer	- Approver - Review Creator - Review Manager - Reviewer	iRobot must populate containers with new roles
Shared Teams		Design Review Team	Peer Review Team	No change
Workflow		Design Review Workflow	Peer Review Workflow	No change
Policies		- Review Mgr = Full Control - Team Members = Read, Download - Review Creator = Create	- Review Mgr = Full Control - Team Members = Read, Download - Review Creator = Create	iRobot must create Org level ACL's
Object Initialization Rules		Design Review	Peer Review	No change
Life Cycles		Design Review Life Cycle	Peer Review Life Cycle	No change
Table Views		- Review - Thumbnail Navigation	- Review - Thumbnail Navigation	iRobot must create the new table views

Roles

The Review object requires container roles to make it work successfully. OOTB container templates and containers created from these templates will automatically populate with these roles. Custom container templates and containers created from these templates need to be manually updated with these roles.

Role Descriptions

The default role description for Review objects is not clear that it is related to the Review process and should be updated as follows to make sure these roles are not confused with existing Change Management roles. These changes can be made with the enumCustomize.sh utility on the server nodes.

- Approver - Peer & Design Review Approver
- Review Creator - Peer & Design Review Creator
- Review Manager - Peer & Design Review Manager
- Reviewer - Peer & Design Reviewer

Implement Container Roles

Since the new container roles are not propagated to custom container templates or their children, these roles will need to "loaded" into each container. This can be done manually with copy/paste on the Teams page or with a load file and a script to load the roles in all Product containers.

Access Control Policies

Access Control Policies need to be created and managed to allow users to create and participate in a Review activity. PTC has implemented these as container level policies which will be difficult to manage. Proposal is to remove all the container policies related to Review objects and replace them with Org level policies to make them universal for all container types.

	Domain	Context	Type^	State^^	Participant	Applies To	Grant Permissions	Deny Permissions	Absolute Deny Permissions
☐	Default	DO NOT USE - EMPTY - Original R2	Design Review	All	Review Manager	Participant	Full Control (All)		
☐	Default	DO NOT USE - EMPTY - Original R2	Design Review	All	Team Members	Participant	Read, Download		
☐	Default	DO NOT USE - EMPTY - Original R2	Design Review	Open	Review Creator	Participant	Create		
☐	Default	DO NOT USE - EMPTY - Original R2	Peer Review	All	Review Manager	Participant	Full Control (All)		
☐	Default	DO NOT USE - EMPTY - Original R2	Peer Review	All	Team Members	Participant	Read, Download		
☐	Default	DO NOT USE - EMPTY - Original R2	Peer Review	Open	Review Creator	Participant	Create		

(0 objects selected)

Table Views

The upgrade process did not create new table views for the Review object in Windchill. Review objects are Change objects and are only visible at the root level of the Folder page in a container.

Folder Contents Table

Create a new Review table view that filters objects to Design Review and Peer Review only

Review Objects Table

Create a new Thumbnail Navigation table view that includes Thumbnail Navigation as a column instead of Object Type Indicator
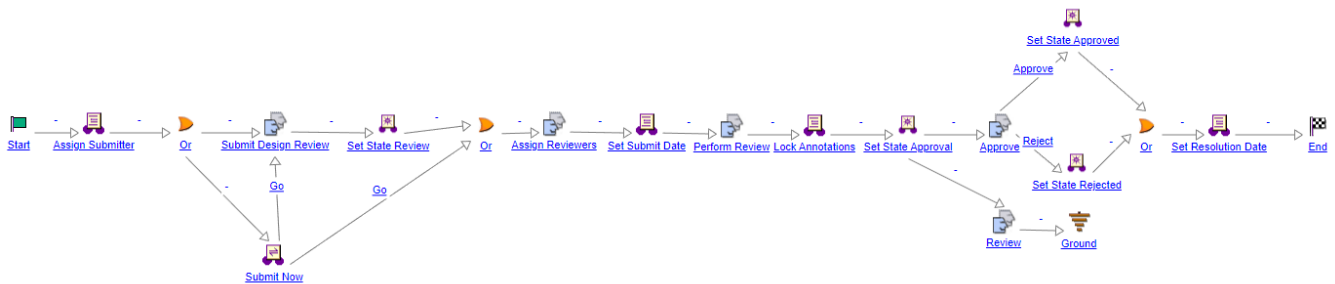
Custom Tab

Create a new tab named, Discussions, and make public to provide better accessibility to the Review's associated Discussions.
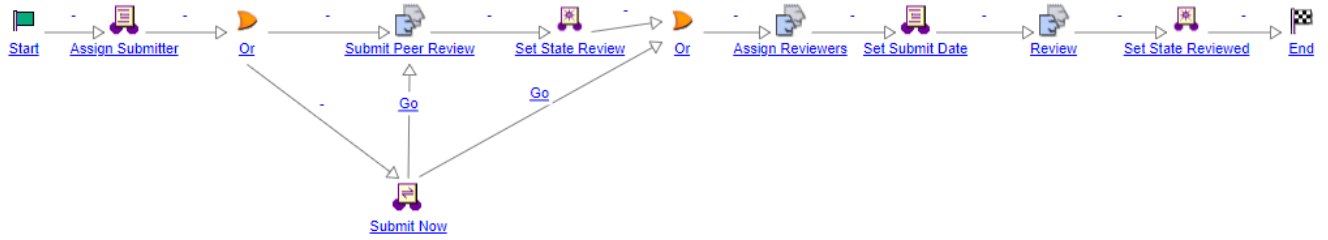
Worklfows

The Review object uses two workflows based on the type of Review selected. There are no required changes to these workflows at this time.

- Design Review Workflow

- Peer Review Workflow

Life Cycles

- Design Review Life Cycle

| Open | | Review | | Approval | | Approved | | Rejected | | Canceled |

- Peer Review Life Cycle

| Open | | Review | | Reviewed | | Canceled |

How to use Annotations

The Annotations table on the Review object will display all annotations created in the Review object. It will not list annotations created from other locations.

To create a Review annotation, use the RMB context menu on an item in the Review Objects table and select Open in Creo View. Create a markup and save in Creo View to make the annotation visible in the Associated Annotations table.

Nice to Have Updates

The default layout of the Details tab could be updated to change the order and update the elements on the tab. Unfortunately, the layout of the components cannot be dynamically repositioned by users like the Windchill Home page. The following order will make the page more user friendly and provide all the critical information on a single tab.

1. Attributes
2. Review Objects
3. Attachments
4. Annotations
5. Discussions
6. Process Objects
7. Reference Objects