

Overview – Solution Package

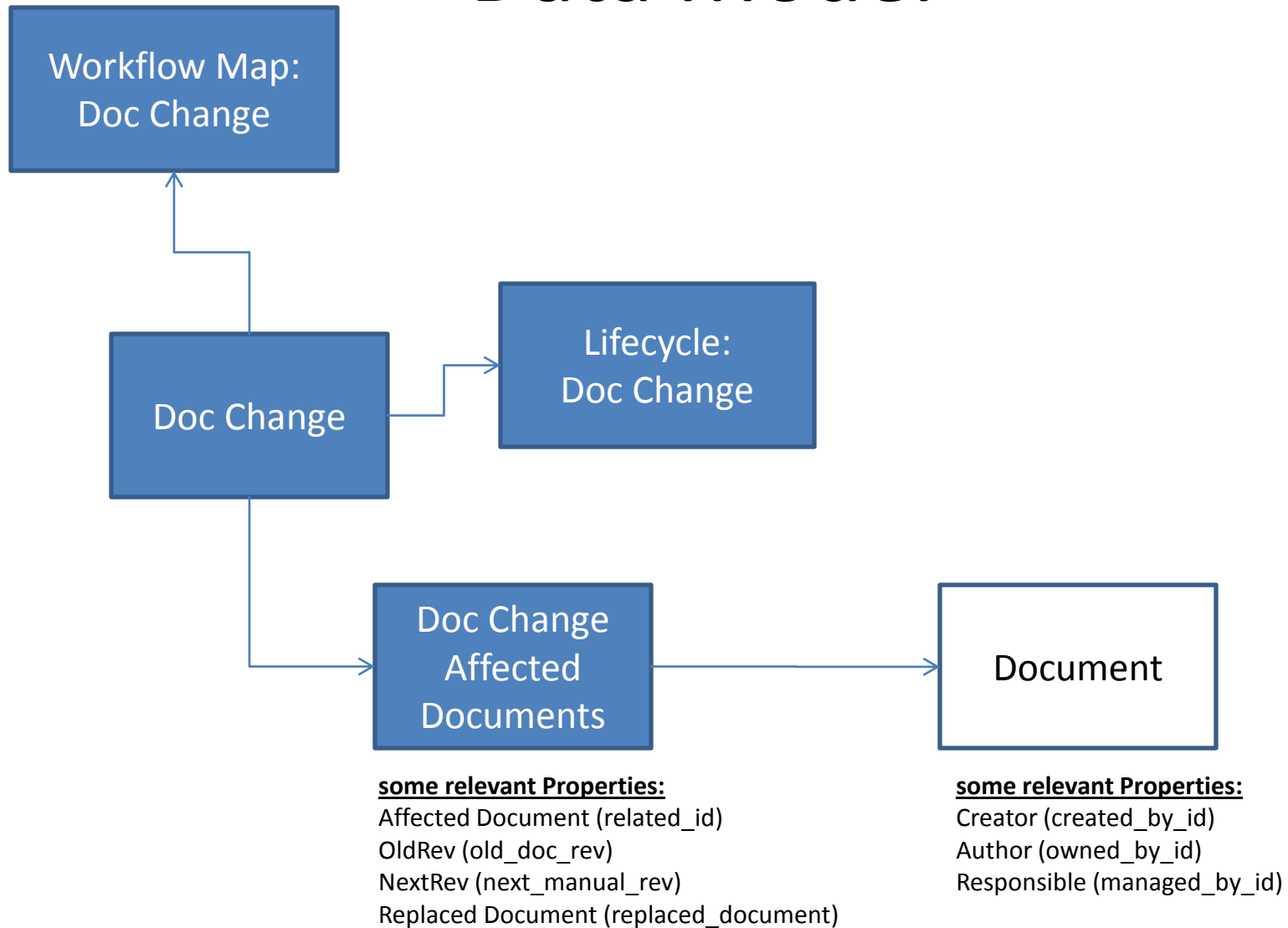
„DocChangeProcess-Vxx“

- This Add-On Package adds a **simplified** change and release process **for documents** (only)
- It loads on top of the standard „Product Engineering“ solution and can be used in parallel with the standard change management there.
- Identity „DocChange Management“ has „World“ listed so all users can work with DocChanges. You may want to replace „World“ with other identities more suitable.
- It will extend the life cycle map of documents and add a shorter workflow with „Fast Track“ and „Review“ options.
- If author (owned_by) and Responsible (managed_by) are set on documents, these identities will automatically be added to the review activities of the workflow.

Installation

- Use the Solution Upgrade Tool to import the package „DocChangeProcess-Vxx“
→ You MUST use the „Merge“ option.
- Unpack the zip-file „DocChange-Client-Overlay-Vxx“ into the „client“ folder of your Innovator installation path.
- DONE
- Read the Documentation to learn how it works.

Data Model



Supporting Methods

- **Add to new Doc Change Action**
 - Executes “Action” – “Add to new Doc Change”
- **Affected Doc Handling**
 - Creates new revisions for affected documents (like “Affected Item Handling” does for ECNs)
 - set the “OldRev” field (traceability) before new rev is created
- **Affected Doc Promotion**
 - Promotes life cycles of affected documents according to DocChange status
 - If released, updates “NextRev” to final rev created
- **Dynamic DocChange WF Assignments**
 - Adds document’s Author and Responsible to assignments in DocChange workflow
- **Get_DocChange_Default_Owner**
 - If no “Doc Change Owner” set, assigns “Creator” to be the owner. (OnBeforeAdd)
- **Freeze_old_Drafts_of_Doc**
 - Called “onAfterVersion” of document. Status of old generations, if value = “Draft”, will be set to “Draft (frozen)”. State permission on document’s lifecycle will not allow “update” in this state.

Dynamic Workflow Assignments

2 „special“ identities are added with the package and can be used as assignments to activities in the „Doc Change Workflow Map“ in conjunction with method „Dynamic DocChange WF Assignments “ (also attached to this activity)

Note: these identities should not be used for any other purpose and should not have any members.

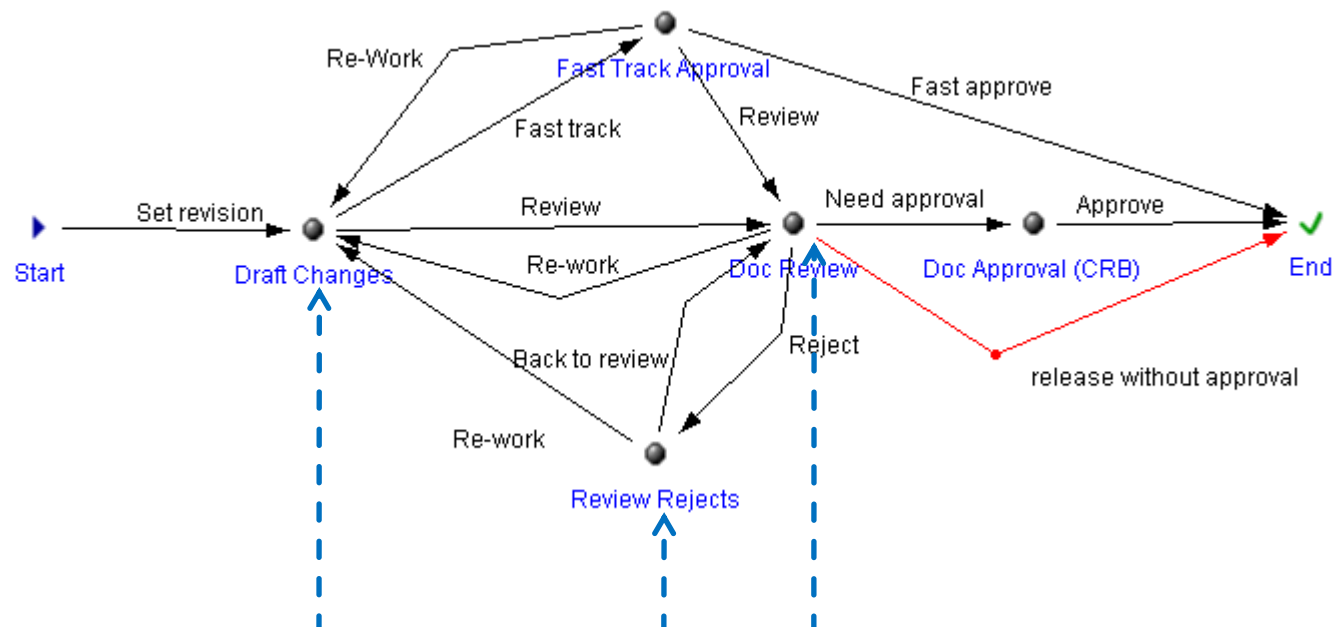
[affected item Owners] – serves as a place holder for the actual identity set in property „owned_by_id“ of a document listed under „Affected Documents“. It

[affected item Managers] – serves as a place holder for the actual identity set in property „managed_by_id“ of a document listed under „Affected Documents“

When activated, the method „Dynamic DocChange WF Assignments“ will scan through all affected documents and resolve the place holders with the actual identities connected to the documents. If „owned_by_id“ is NULL, then the „created_by_id“ is used instead. The place holder assignments will be removed after they got resolved.

Doc Change – Workflow Map

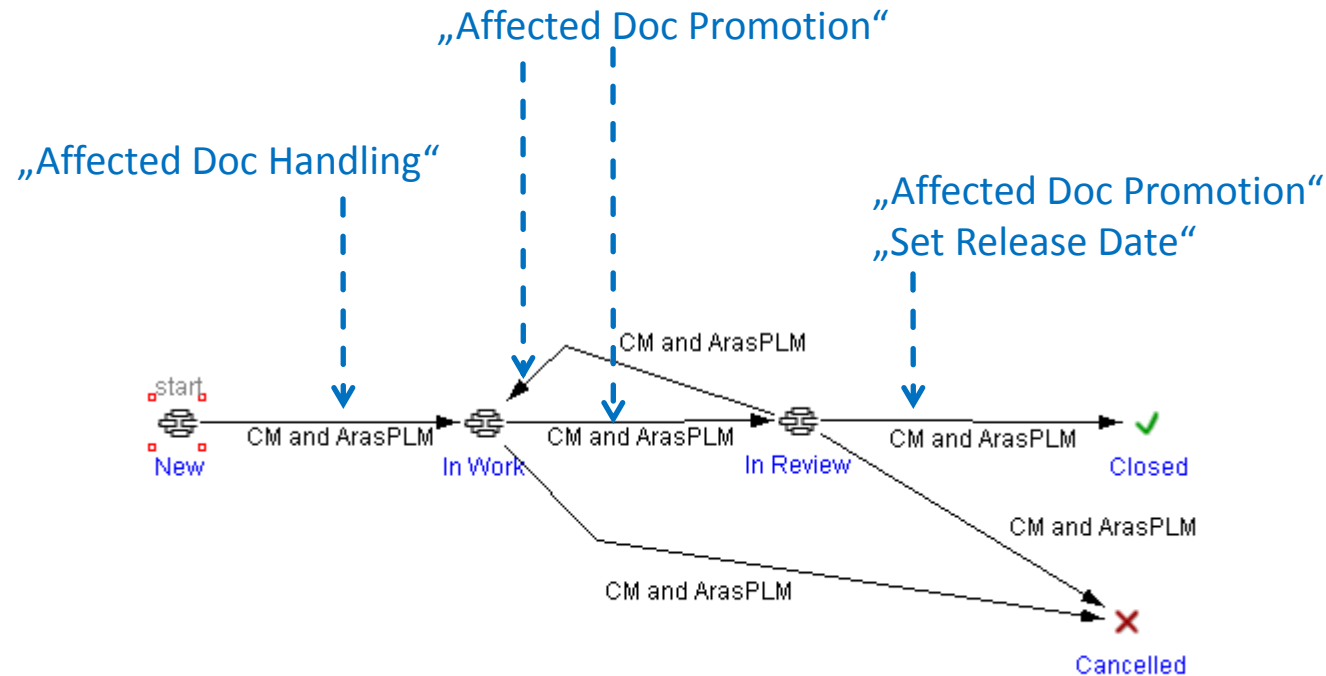
- Fast approvals in just 2 steps
- Doc Review with optional Doc Approval



Attached Server Method: „Dynamic DocChange WF Assignments”

If place holder identities: [affected item Owners] or [affected item Managers] are used here, then the Authors and/or Responsibles connected to documents are added.

Doc Change – Lifecycle Map



Doc Change Form

Doc Change - DCO-00000182 - Microsoft Internet Explorer

File Edit Views Actions Reports Tools Help

New

Doc Change Number DCO-00000182 **Doc Change Title** Release Rev A

Doc Change Type ☒ First Release ☐ New Revision Release **Doc Change Owner** Innovator Admin

Doc Change

Created By: Innovator Admin

Description

Affected Documents

Actions **Pick Related**

Affected Document	OldRev	NextRev	State	Has_fil	Document Number	Revision	Ver	Name	Type	Replaced Document [...]	CAD Flag
DOC-MISC-000001		auto	Preliminary		DOC-MISC-00000106	A	2		/Document/Miscellaneous		

Ready Items 1-1 of 1. Page 1 of 1

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- Simplified - No „superceded“ and „Add, Change, Delete“ settings.
- Optional reference to document to be replaced

Read-Only:
Will be set by method:
„Affected Doc Handling“

You can manually set the next revision here.
But it must be a valid revision from the
document's revision sequence

Context Menu: Actions

→ Add to new Doc Change

The screenshot displays a software interface with a table of documents and a detailed view of a selected document. A context menu is open over the selected document row, and a secondary menu is open over the 'Add to new Doc Change' option.

Document Table:

has_fil	Document Number	Revision	Ver	Name	Type	State	CAD Flag
<input type="checkbox"/>	BRC-00-8668	A	1	Side Rider			
<input type="checkbox"/>	CD-10-0012304	A	1	Side Rider			
<input checked="" type="checkbox"/>	DOC-CAD-00000103	A	1	SolidWork			
<input checked="" type="checkbox"/>	DOC-DWG-00000102	A	1	ACAD - PO			
<input checked="" type="checkbox"/>	DOC-DW-X000001	A	3	Testing			
<input checked="" type="checkbox"/>	DOC-MISC-00000101	A	2	BasicsDer			
<input type="checkbox"/>	DOC-MISC-00000106	A	2				
<input checked="" type="checkbox"/>	DOC-SPEC-00000107	A	1				
<input type="checkbox"/>	DW-L-10-901030	A	1	Chasis - S			
<input checked="" type="checkbox"/>	L-10-901031-D	A	1	Drawing -			

Context Menu (Open over L-10-901031-D):

- Edit
- View
- Print
- Purge
- Delete
- Export To Excel
- Export To Word
- Lock
- Revisions
- Promote
- Where Used
- Structure Browser
- Properties
- Add to Desktop
- Add to new ECN
- Add to new ECR
- Load to Authoring Tool
- Add to new Doc Change

Secondary Menu (Open over 'Add to new Doc Change'):

- Add to new ECN
- Add to new ECR
- Load to Authoring Tool
- Add to new Doc Change

Document Details Window (Title: Document - L-10-901031-D 1 Drawing - Head Lights Bar (read only) - Microsoft Internet Explorer):

Actions: Add to new ECN, Add to new ECR, Load to Authoring Tool, Add to new Doc Change

Classification: Drawing

Created By: Bill Designer
Created On: 5/8/2008
Modified By: Bill Designer
Modified On: 5/8/2008
Locked By:
Major Rev: A
Release Date:

Name: Drawing - Head Lights Bar

Authoring Tool: Version: Has Files

Description:

Assigned Creator:
Designated User:

Files | Documentsstructure | Document XRef | Document Part | Changes

Actions: Create Related

File Name | File Type [...] | Ver | Comments | Sequence | CAD Flag

Ready | 0 Items found. Page 1 of 1 | **ar.a.s INNOVATOR**

Modified Relationship View – on Document Relationship: „Document Changes“

- A new HTML file „Changes_extended.html“ will be added to the „Client“ folder sub-structures in your Innovator installation path.
- Also a new XML file „ChangeGrid_extended.xml“ will be added.
- Both are part of the „DocChange-Client-Overlay-Vxx.zip“ file

RelationshipType - Document Changes - Microsoft Internet Explorer

File Edit Views Actions Reports Tools Help

Name
Document Changes

Label
Changes

Description

General
☒ Auto Search
Sort Order: 256
Default Page Size:

Source
Source Item Type: Document ☐ Hide In All

Related
Related Item Type:
Min Occurs:
Max Occurs:
Behavior: Float
Grid View:
On New Related Option:
☐ Pick Only
☐ Create Only
☒ Pick & Create
☐ Requires Related
☐ Open Related Form

Paste Defaults
☐ Copy Permissions
☐ Create Related

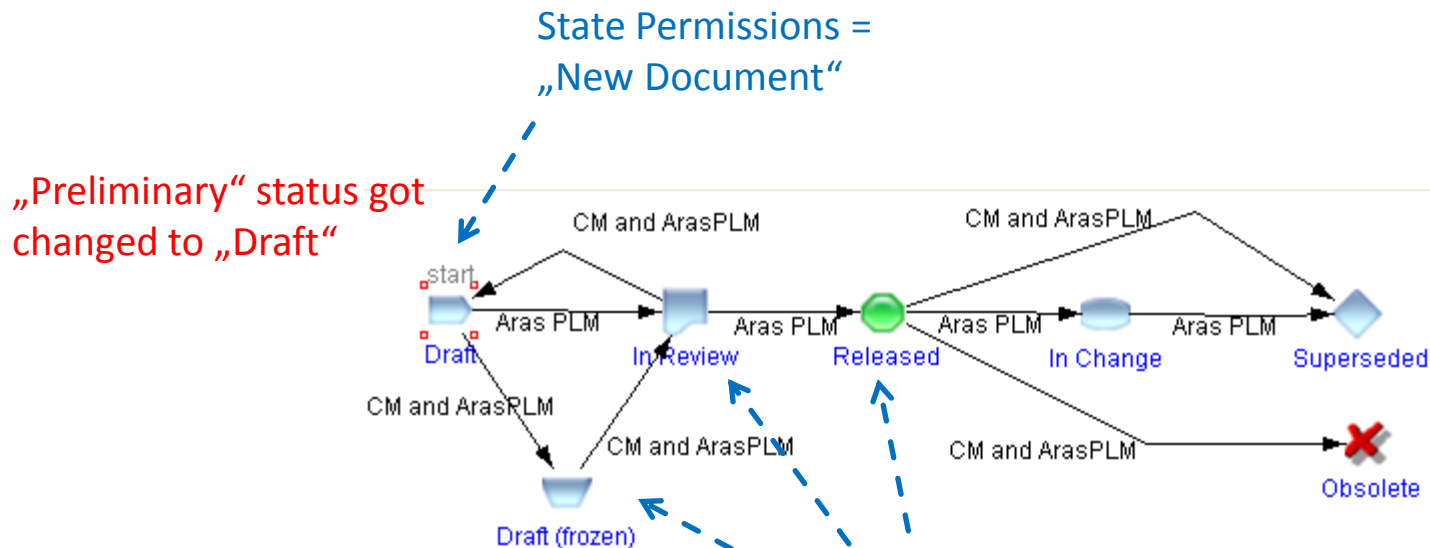
Grid Events | Relationship View | Exclusion | Hide In | Hide Related In |

Actions | Pick Related | Page Size: |

Name	Start Page	Parameters	Grid [...]	Form [...]
World	.../Solutions/PLM/scripts/Changes/Changes_extended.html			

In addition to PR, ECR, ECN from standard Product Engineering, the new DocChange must also be included in this view. Therefore the queries in the related HTML file got updated.

Modified – LifeCycle Map for Documents

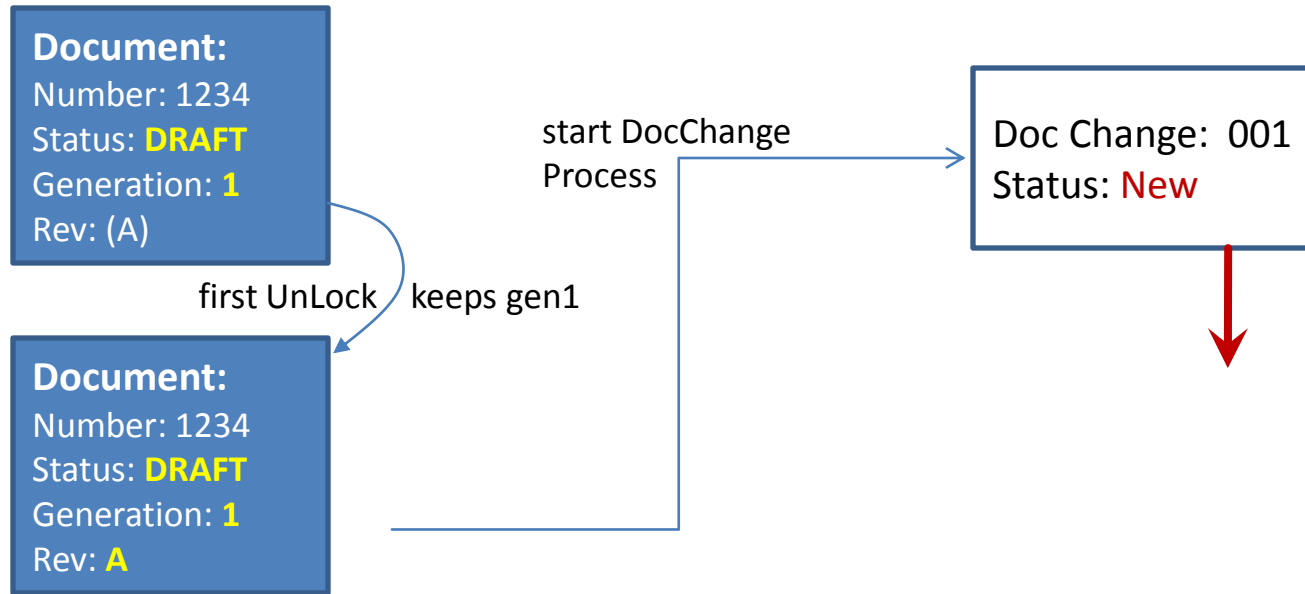


New status „Draft (frozen)“ will be automatically set by method „Freeze_old_Drafts_of_Doc“ to prevent modification of old generations of a document.

State Permissions = „Released Document“

Versioning Behaviour – New Document

Create New Document



Versioning Behaviour – New Document

Create New Document

Document:

Number: 1234

Status: **DRAFT**

Generation: **1**

Rev: (A)

start DocChange
Process

Doc Change: 001

Status: **New**



Document:

Number: 1234

Status: **DRAFT**

Generation: **3**

Rev: (A)

Lock / Unlock
every (Lock & 1st Save)
increases generation

Make your changes
here.

- Modify Meta-data
- Modify files
- Add files

Versioning Behaviour – New Document

Create New Document

Document:

Number: 1234

Status: **DRAFT(frozen)**

Generation: **1**

Rev: (A)

If the status of previous generations = „Draft“ it will be set to „Draft (frozen)“

start DocChange Process

Doc Change: 001
Status: **New**

Workflow Activities

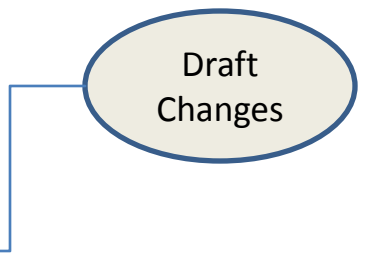
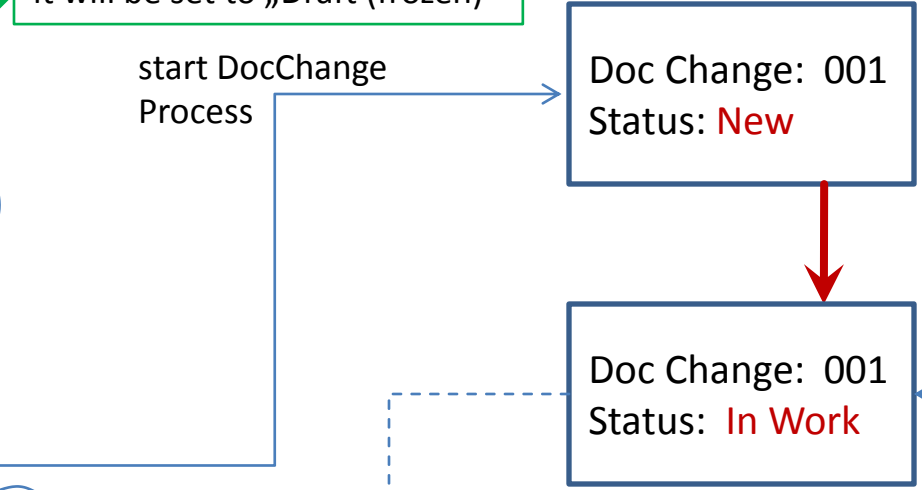
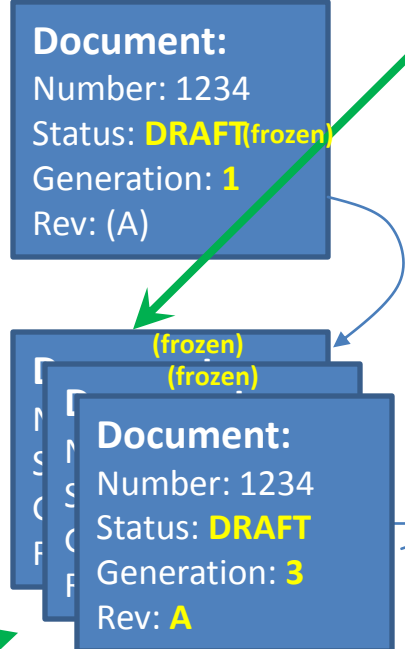
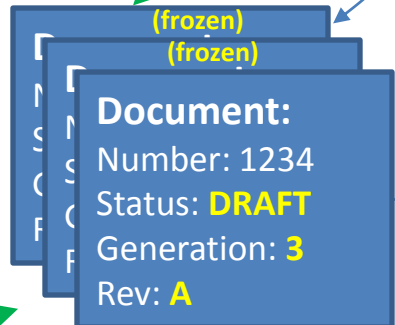
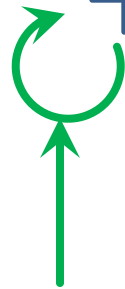
Draft Changes

Doc Change: 001
Status: **In Work**

version

Lock / Unlock
every (Lock & 1st Save)
increases generation

Make your changes
here.
-Modify Meta-data
-Modify files
-Add files



Versioning Behaviour – New Document

Create New Document

Document:

Number: 1234

Status: **DRAFT(frozen)**

Generation: **1**

Rev: (A)

If the status of previous generations = „Draft“ it will be set to „Draft (frozen)“

start DocChange Process

Doc Change: 001
Status: **New**

Workflow Activities

Draft Changes

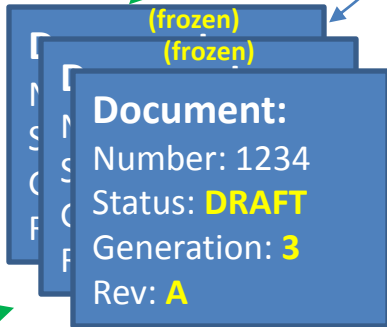
Doc Change: 001
Status: **In Work**

Doc Review

Fast Track

Doc Change: 001
Status: **In Review**

End



Lock / Unlock every (Lock & 1st Save) increases generation

Make your changes here.
-Modify Meta-data
-Modify files
-Add files

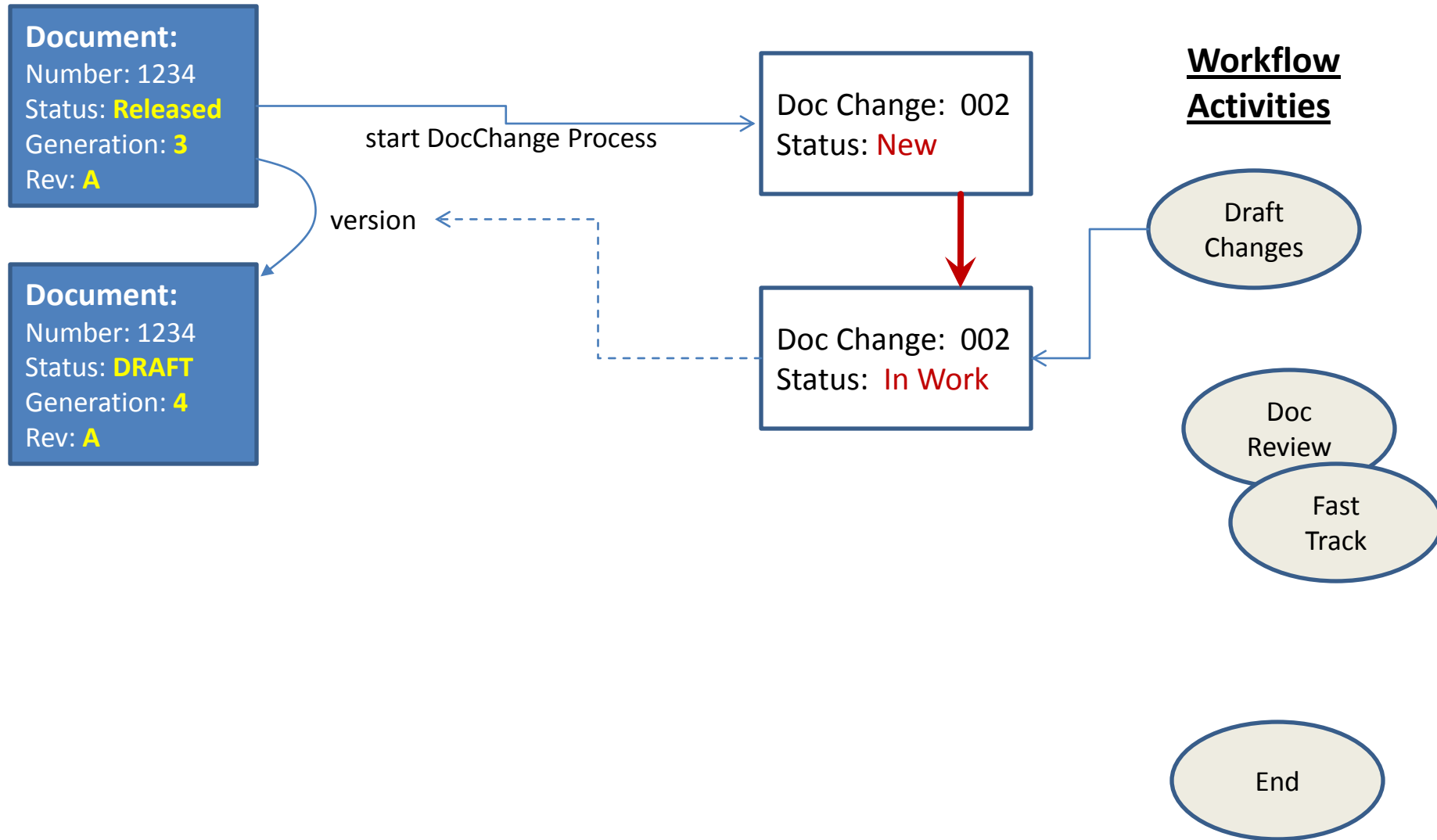
Document:
Number: 1234
Status: **In Review**
Generation: **3**
Rev: **A**

Document:
Number: 1234
Status: **Released**
Generation: **3**
Rev: **A**

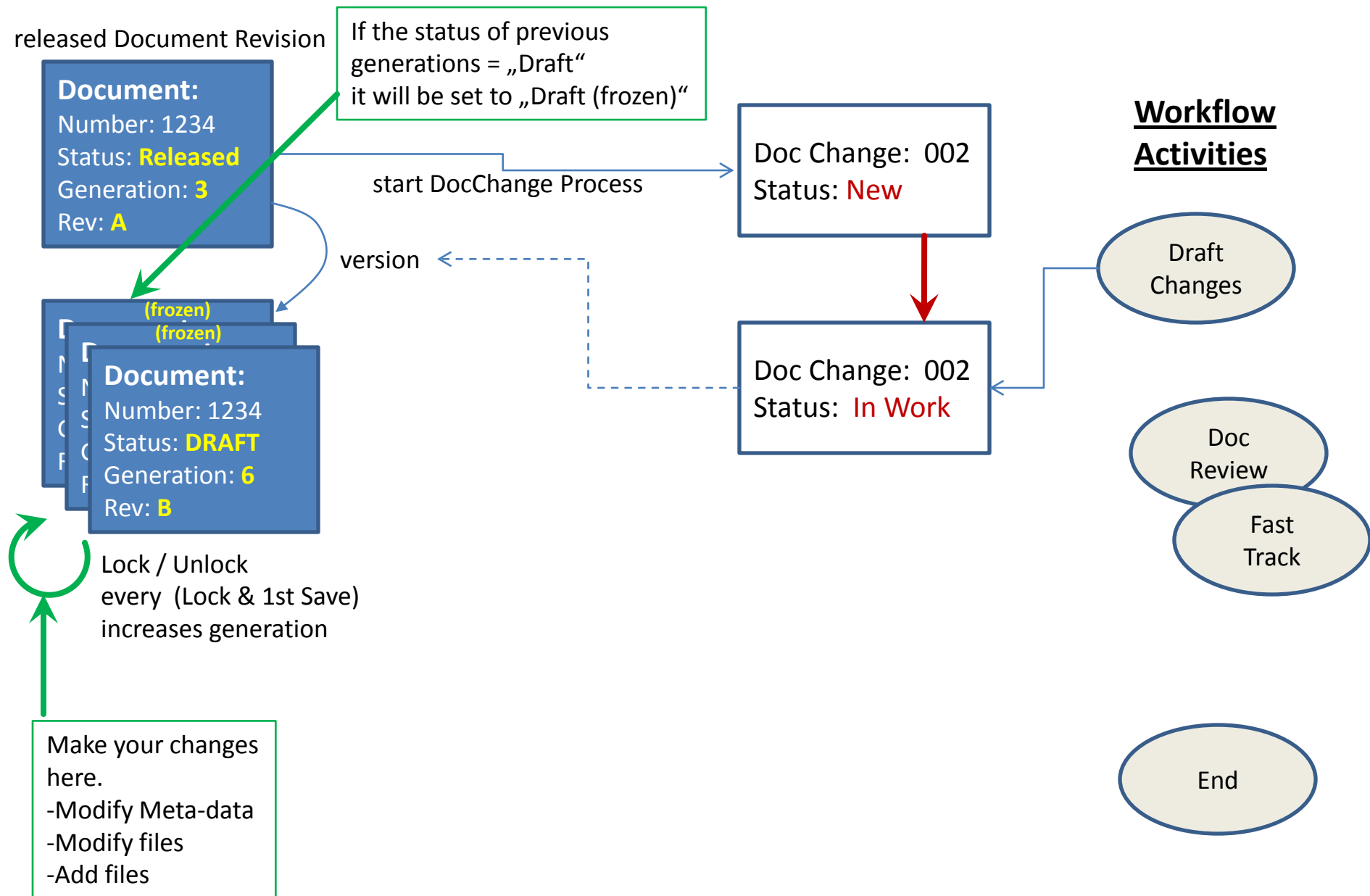
Doc Change: 001
Status: **Closed**

Versioning Behaviour – Document Revision

released Document Revision



Versioning Behaviour – Document Revision



Versioning Behaviour – Document Revision

