

## Assignment-practice-workflow:

### 1.Create a workflow containing two activities at org level

- \* 1st activity name: Review Part
- \* 1st activity participant: Designer role
- \* Completion required by any of the user
- \* 2nd activity name: Approve Part
- \* Participant: Approver
- \* All users are required to complete this activity

### 2.Now, create a team template at Organization level, name it as: organizationname\_Team

Mention this in your part OIR

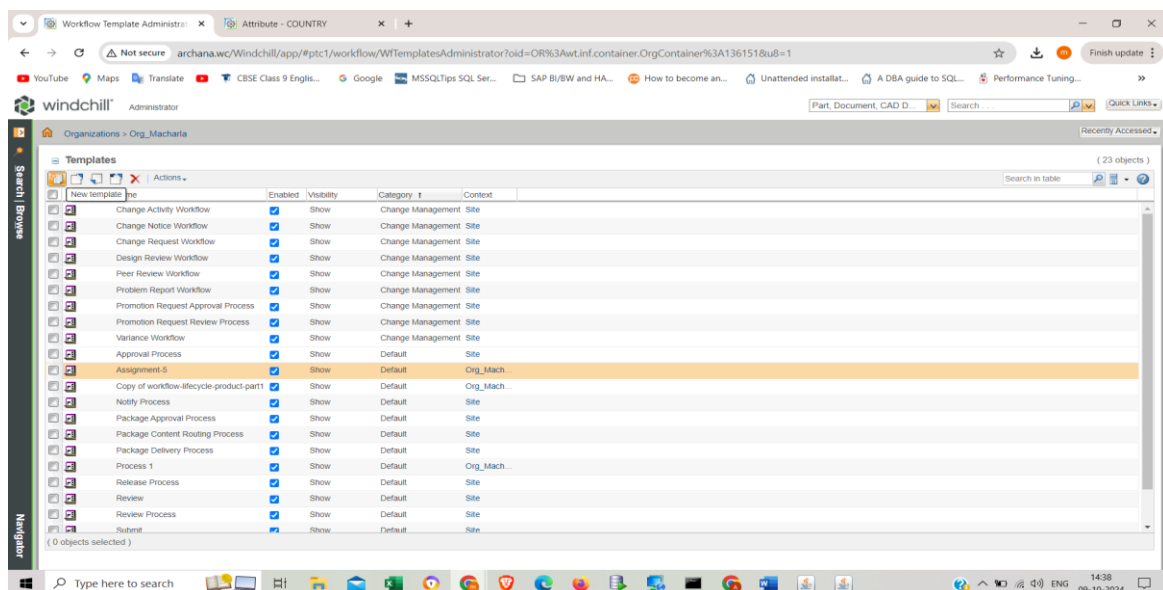
Have designer and approver in this team template.

3.Test the workflow in different products containing different users in the context team roles and make sure workflow works as expected completion required by any of the user

### 1.Create a workflow containing two activities at org level

- \*1st activity name: Review Part
- \* 1st activity participant: Designer role
- \* Completion required by any of the user
- \*2nd activity name: Approve Part
- \* Participant: Approve
- \* All users are required to complete this activity

Step1: go to site/org->utility->workflow template-> choose new template (top left corner icon)



Step2: ->1st activity name: Review Part

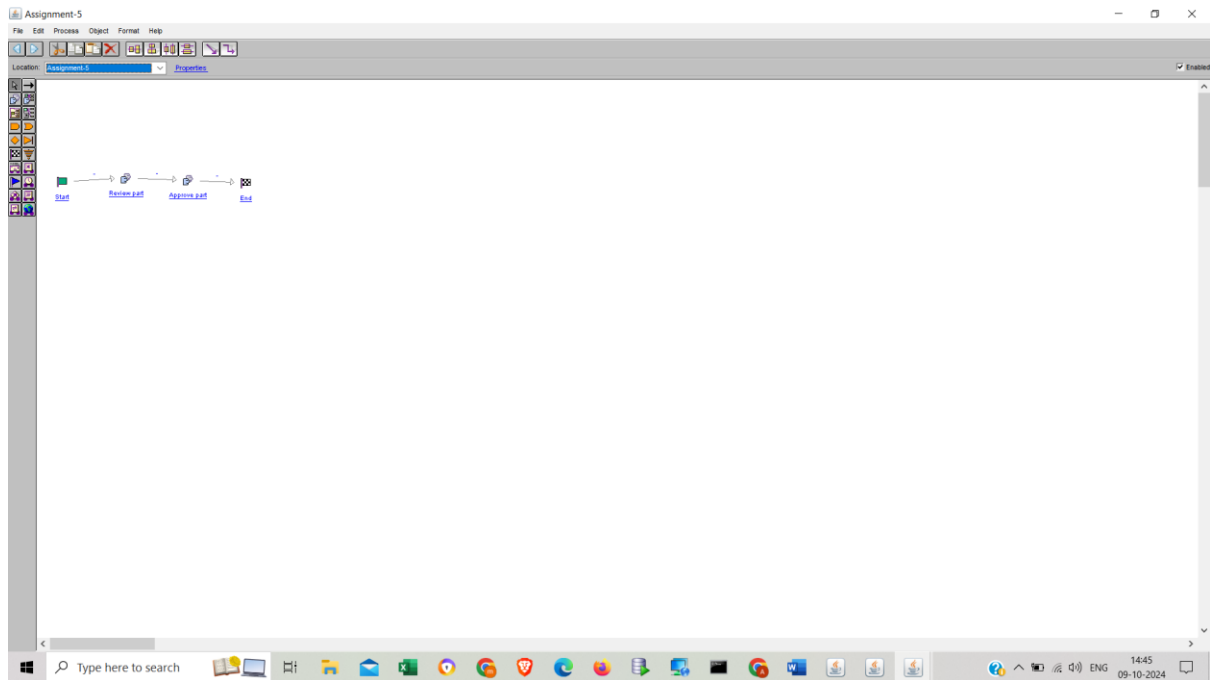
->1st activity participant: Designer role

->Completion required by any of the user

->2nd activity name: Approve Part

->Participant: Approver

->All users are required to complete this activity



Step3: go to site/org utility->lifecycle manager->choose the name ->r/c->Edit

The screenshot shows the Windchill Administrator web interface. The top navigation bar includes the Windchill logo and the text "Administrator". The main content area is titled "Life Cycle Templates" and displays a table of templates. The "Basic\_LC" template is highlighted in orange. A context menu is open over the "Basic\_LC" row, showing various actions that can be performed on the template. The table columns are: Name, Enabled, Visibility, Available for Routing, and Context.

Name	Enabled	Visibility	Available for Routing	Context
Action Item	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
Agreement	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
Approval Routing	<input checked="" type="checkbox"/>	Show	<input checked="" type="checkbox"/>	Site
Approval	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
Basic	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
Basic_LC	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Org_Macha...
CI View	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Edit	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Rename	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Move	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Delete	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Save As	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Check Out	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Undo Checkout	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Check In	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
CI Delete Latest Iteration	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Org_Macha...
CI Iteration History	<input checked="" type="checkbox"/>	Show	<input checked="" type="checkbox"/>	Site
CI Export	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
One Phase Development	<input checked="" type="checkbox"/>	Show	<input type="checkbox"/>	Site
Package Approval Routing	<input checked="" type="checkbox"/>	Show	<input checked="" type="checkbox"/>	Site
Package Content Routing	<input checked="" type="checkbox"/>	Show	<input checked="" type="checkbox"/>	Site

Step4: choose Advanced->workflow->browse previously created workflow->ok

Life Cycle - Basic\_LC

☐ Available for Routing ☒ Enabled

In Training Under Review Implementation Released Canceled

Properties - Life Cycle

\*Type: Basic ☐ Advanced ☒

\*Name: Basic\_LC

\*Location: /System

Description:

\*Class: wt.fc.WTObject

- wt.annotation.AnnotationSet
- wt.annotation.StructuredAnnotationSet
- wt.access.agreement.AuthorizationAgreement
- com.ptc.windchill.bac.delivery.BACReceivedDelivery
- com.ptc.windchill.option.model.ChoiceRule
- com.ptc.windchill.option.model.ChoiceConstraint
- com.ptc.windchill.option.model.ChoiceEnable
- com.ptc.windchill.option.model.ChoiceMapping
- wt.effortitem.ConfigurationItem

Close Help

Life Cycle - Basic\_LC

☐ Available for Routing ☒ Enabled

Click here to display Life Cycle properties

In Training Under Review Implementation Released Canceled

Properties - Phase

\*State: In Training Version Series:

Transitions Roles Access Control Workflow

Phase Process: [Assignment-5](#) ☒ Use Latest iteration

Gate Process: ☐ Use Latest iteration

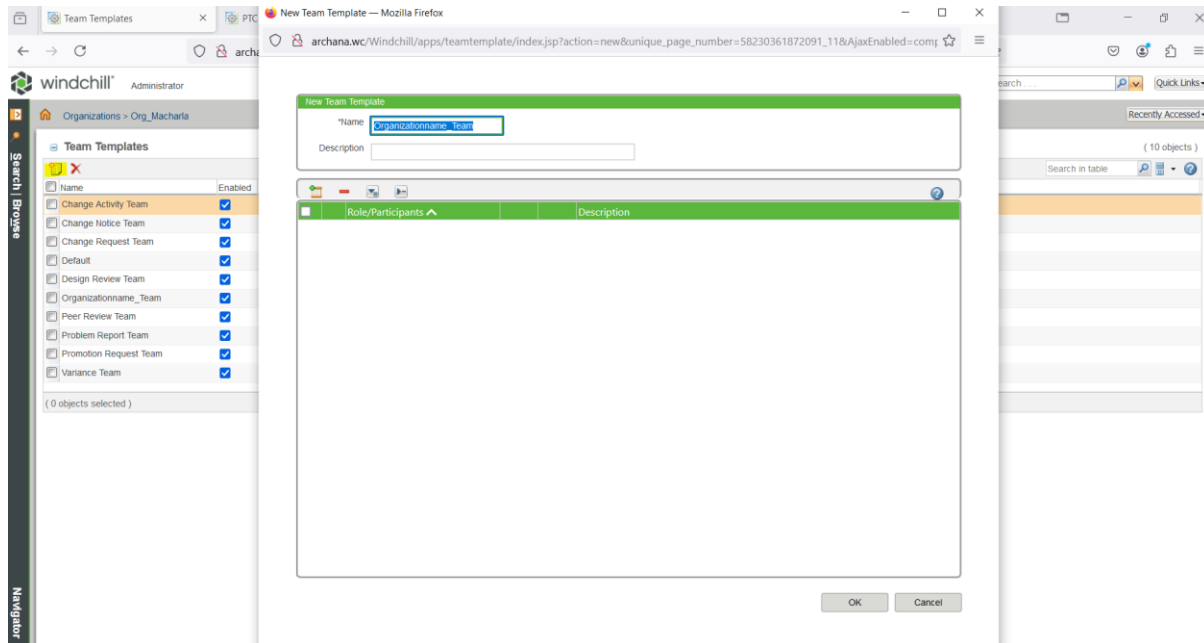
Close Help

2. Now, create a team template at Organization level, name it as: organizationname\_Team

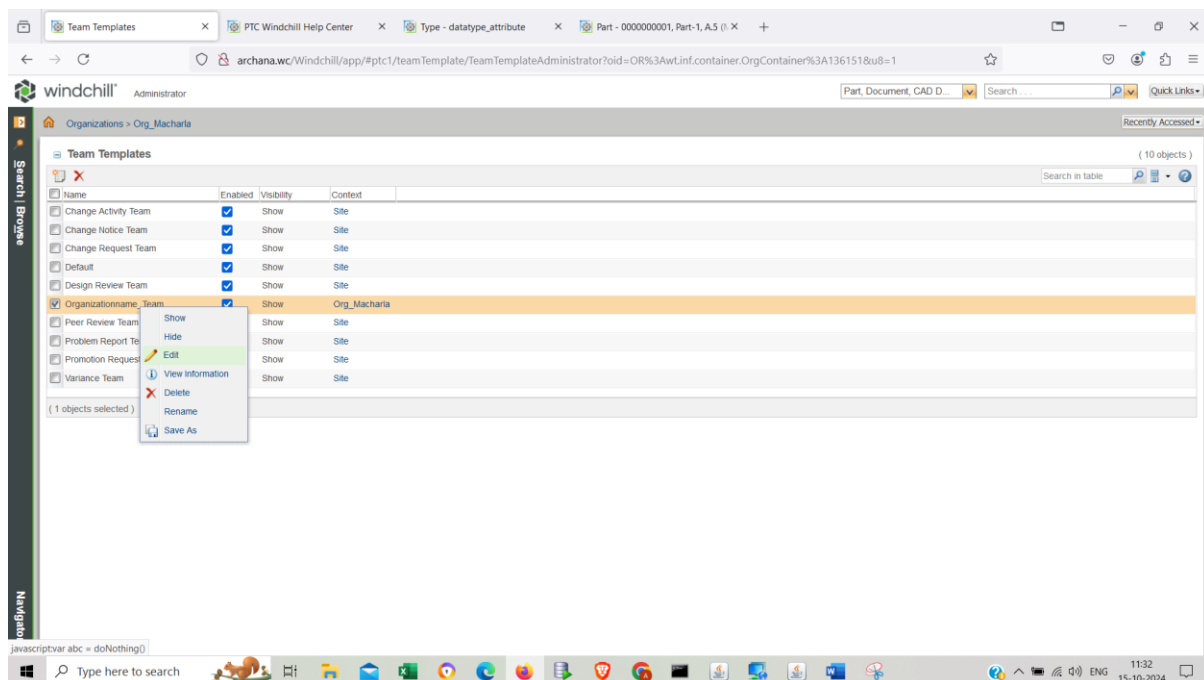
Mention this in your part OIR

Have designer and approver in this team template.

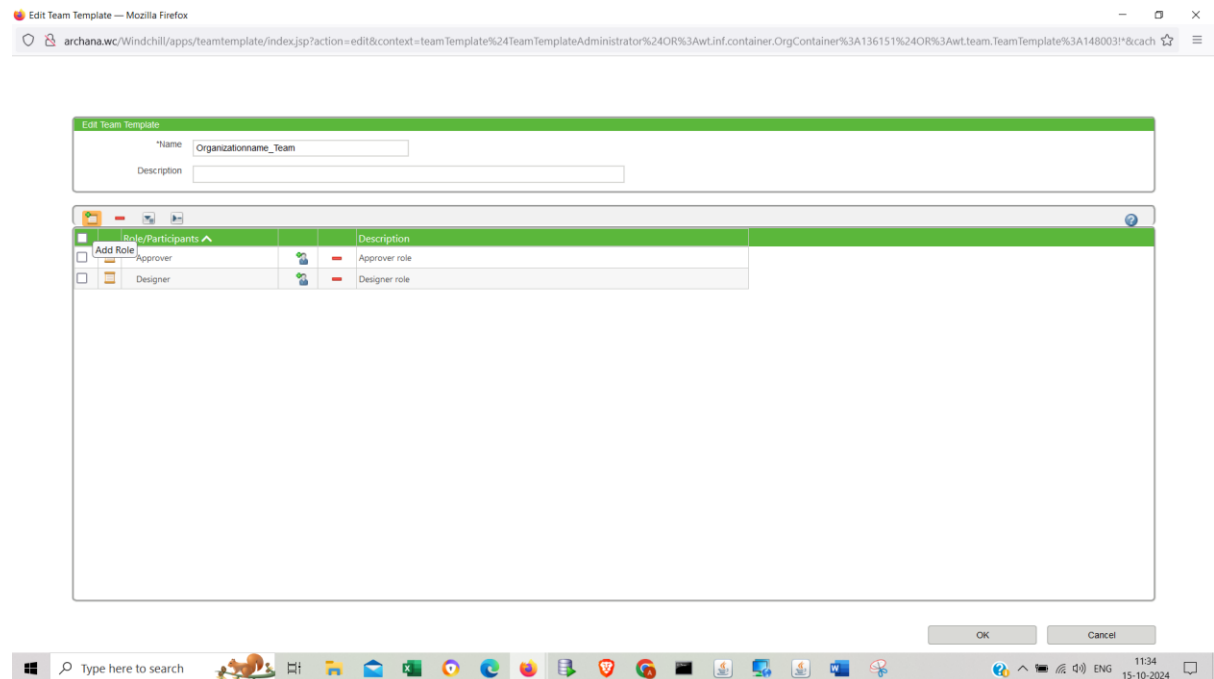
Step1: go to org->utility-> team administrator-> click on new Team Template->fill the name as Organizationname\_Team->ok as shown below



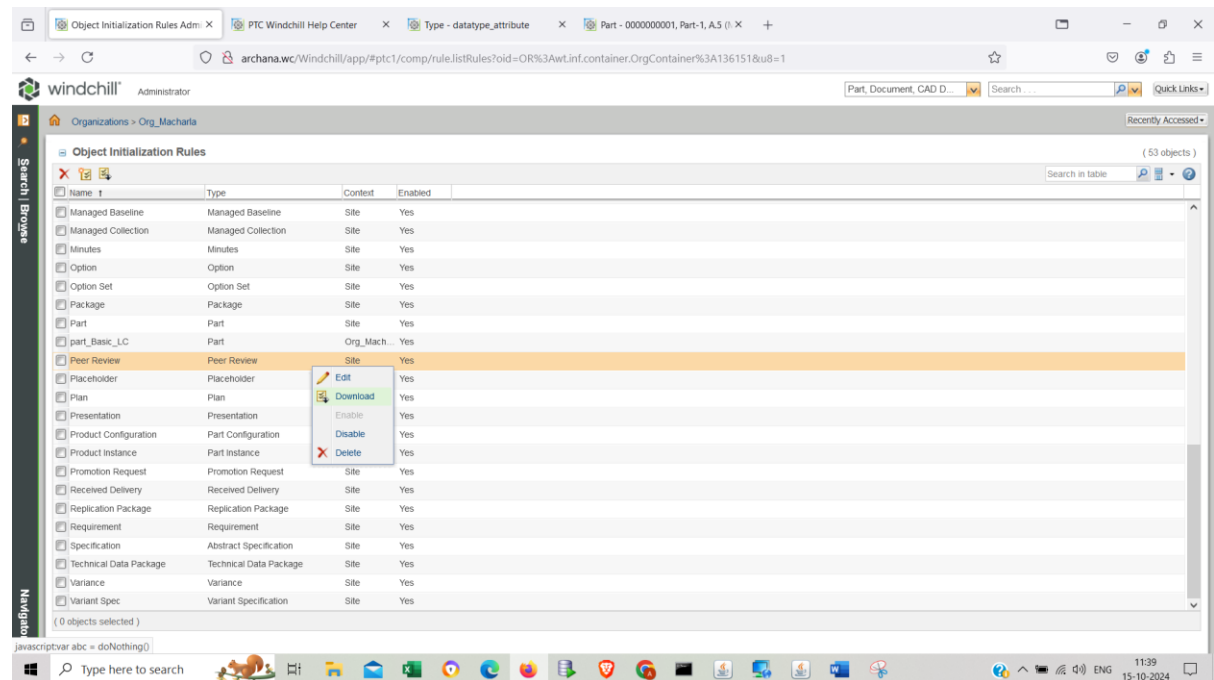
Step2: choose Organizationname\_Team ->r/c->Edit



Step3: add role and Have designer and approver in this team template.



Step4: go to org->utility-> [Object Initialization Rules Administration](#)-> choose the name already we created customized part OIR ->r/c-> download



Step5: after download the part .xml doc we need to change the team template name as shown below->save

rule(2).xml

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```

<AttributeValues objType="wt.part.WTPart">
  <!-- set the folder -->
  <AttrValue id="folder.id" algorithm="com.ptc.core.foundation.folder.server.impl.FolderPathAttributeAlgorithm">
    <Arg>Default</Arg>
  </AttrValue>
  <!-- set the lifecycle -->
  <AttrValue id="lifeCycle.id" algorithm="com.ptc.core.foundation.lifecycle.server.impl.LifeCycleTemplateAttributeAlgorithm">
    <Arg>
      <!-- Translation of the word "Basic" must be the same as the translation done in commonLifeCycles.xml -->
      <?loc-begin key="BASIC_LIFECYCLE_NAME" maxlen="30" match="commonLifeCycles.xml:BASIC_LIFECYCLE_NAME"?>
        Basic_IC
      <?loc-end ?>
      </Arg>
    </AttrValue>
    <!-- set the team template -->
    <AttrValue id="teamTemplate.id" algorithm="com.ptc.core.foundation.team.server.impl.TeamTemplateAttributeAlgorithm">
      <Arg>Organizationname_Team</Arg>
    </AttrValue>
    <!-- set the number to a generated number -->
    <AttrValue id="number" algorithm="com.ptc.windchill.enterprise.revisionControlled.server.impl.NumberGenerator">
      <!-- add a V prefix for variant parts -->
      <Value algorithm="wt.rule.algorithm.BooleanBranch">
        <Value algorithm="wt.rule.algorithm.EqualsTest">
          <Attr id="genericType"/>
          <Arg>variant</Arg>
        </Value>
        <Arg>V</Arg>
      </Value>
      <!-- the sequence -->
      <Arg>{GEN:wt.enterprise.SequenceGenerator:WTPARTID_seq:10:0}</Arg>
    </AttrValue>
    <!-- set the version info to a generated version info -->
    <AttrValue id="MBA|versionInfo" algorithm="com.ptc.core.foundation.vc.server.impl.VersionInfoGenerator">
      <Arg>wt.series.HarvardSeries</Arg>
    </AttrValue>
    <!-- name of variant parts -->
    <AttrValue id="name" algorithm="wt.rule.algorithm.BooleanBranch">
      <Value algorithm="wt.rule.algorithm.EqualsTest">
        <Attr id="genericType"/>
        <Arg>variant</Arg>
      </Value>
      <!-- assign a name only for variant parts. for others return null.
           name should be assigned by the client -->
      <Value algorithm="wt.generic.rule.VariantNameGenerator">
        <Arg>{GEN:wt.enterprise.SequenceGenerator:variantname_seq:10:0}</Arg>
      </Value>
    </AttrValue>
  </Arg>
</AttributeValues>

```

Step6: choose customized part -> r/c->Edit

File Edit View History Bookmarks Tools Help

Object Initialization Rules Admin | PTC Windchill Help Center | Type - datatype\_attribute | Part - 0000000001, Part-1, A.5 | X

archana.wc/Windchill/app/#ptc1/comp/rule.listRules?oid=OR%3AwLinf.container.OrgContainer%3A136151&u=1

windchill Administrator | Part, Document, CAD D... | Search | Quick Links

Organizations > Org\_Macharla

Object Initialization Rules (53 objects)

Name	Type	Context	Enabled
Managed Baseline	Managed Baseline	Site	Yes
Managed Collection	Managed Collection	Site	Yes
Minutes	Minutes	Site	Yes
Option	Option	Site	Yes
Option Set	Option Set	Site	Yes
Package	Package	Site	Yes
Part	Part	Site	Yes
part_Basic_IC	Part	Org_Mach...	Yes
Peer Review	Peer Review	Site	Yes
Placeholder	Placeholder	Site	Yes
Plan	Plan	Site	Yes
Presentation	Presentation	Site	Yes
Product Config	Part Configuration	Site	Yes
Product Instance	Part Instance	Site	Yes
Promotion Request	Promotion Request	Site	Yes
Received Delivery	Received Delivery	Site	Yes
Replication Package	Replication Package	Site	Yes
Requirement	Requirement	Site	Yes
Specification	Abstract Specification	Site	Yes
Technical Data Package	Technical Data Package	Site	Yes

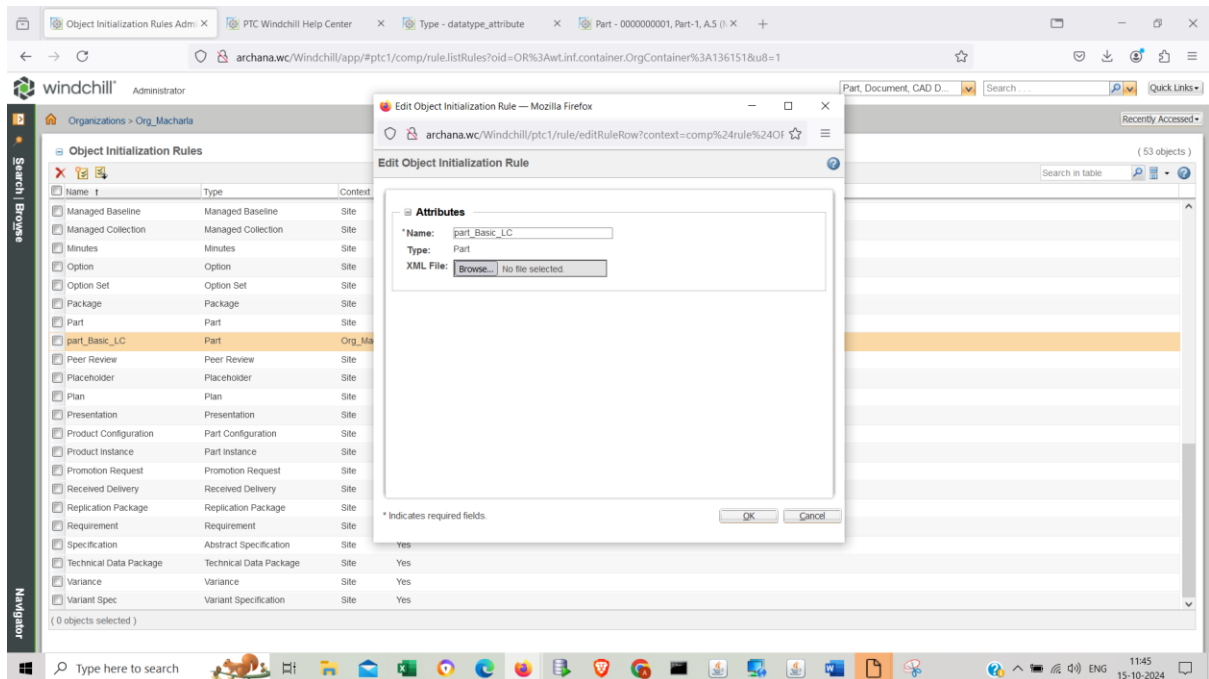
(0 objects selected)

javascript:var abc = doNothing()

Type here to search

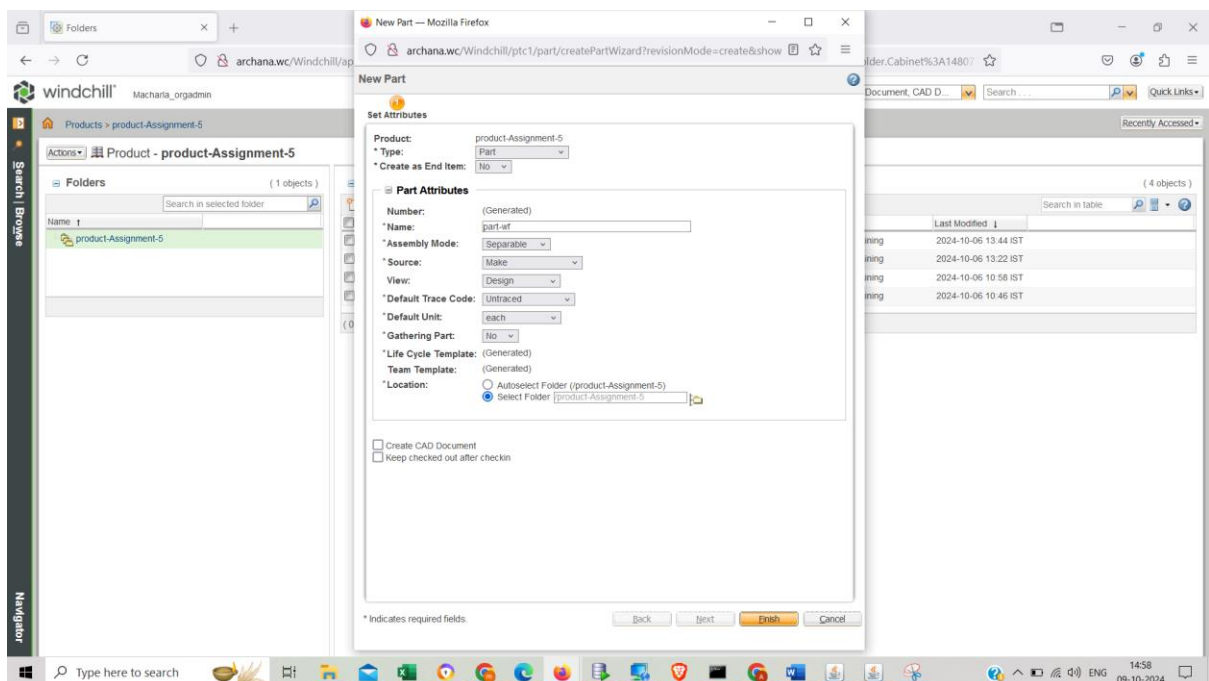
11:44 15-10-2024

Step7: browse the file from local just before download and modified file ->ok

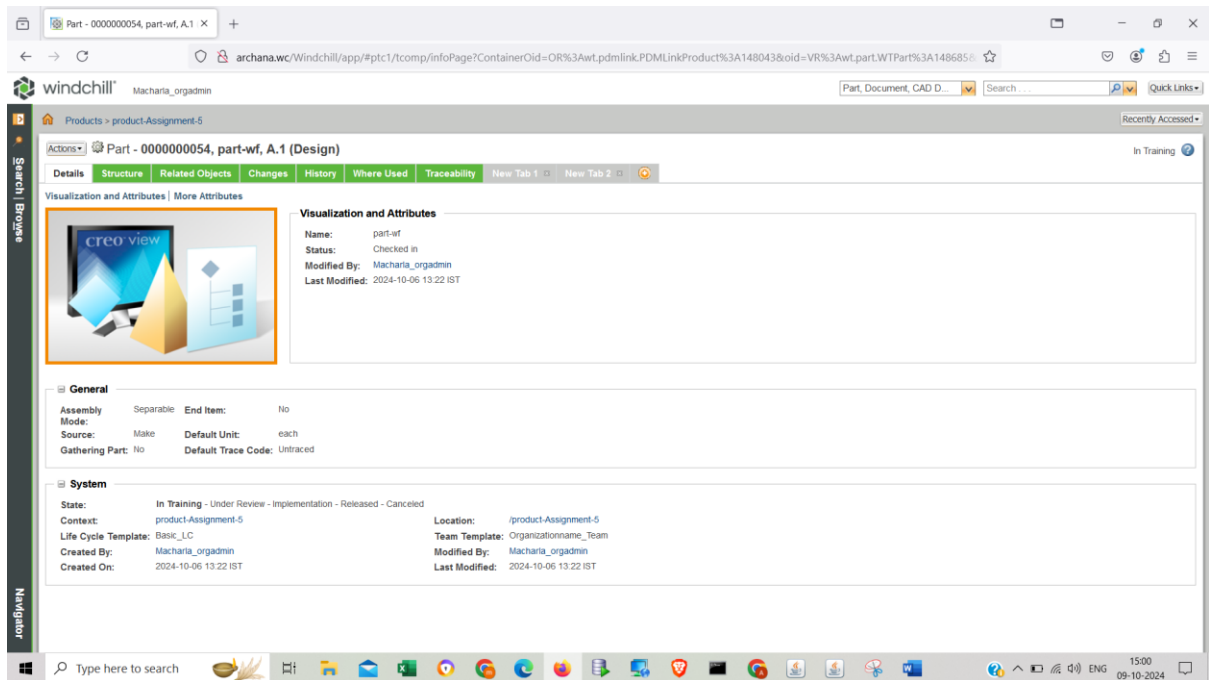


3.Test the workflow in different products containing different users in the context team roles and make sure workflow works as expected completion required by any of the user

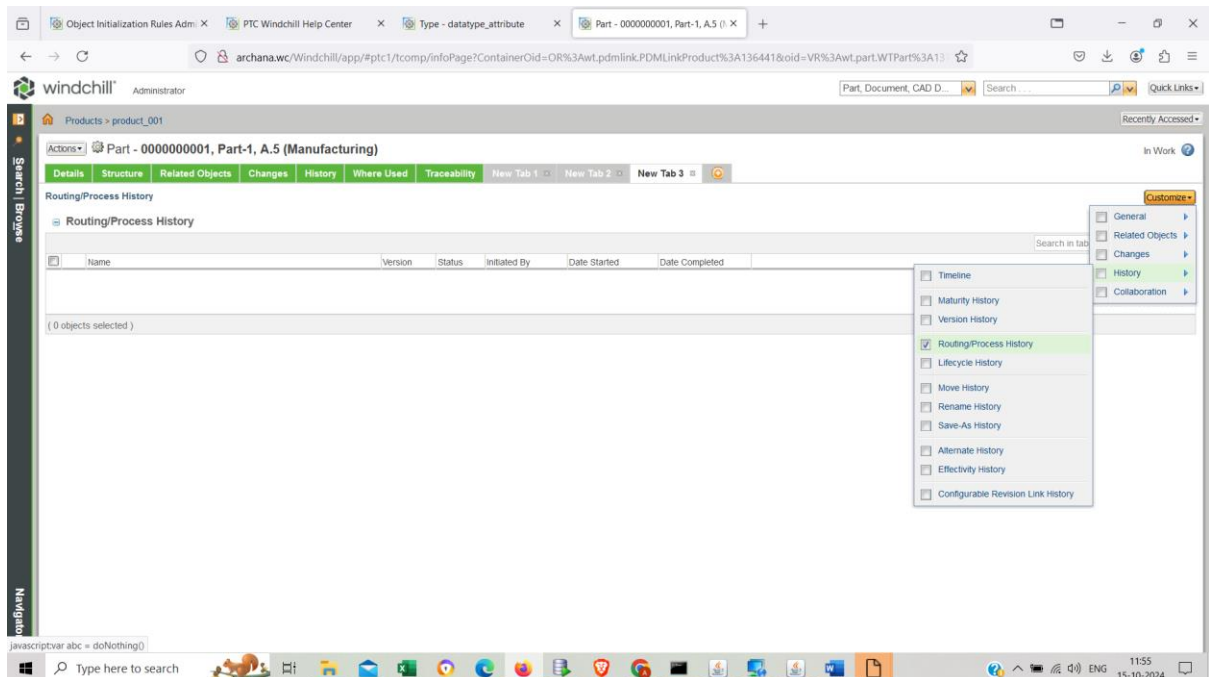
Step1: go to product->folders->create new part->fill required fields -> finish



Step2: go to details tab and check the lifecycle and team template name updated or not.



Step3: click on + icon it open new tab -> choose Customize(downarrow)->history->routing process history





Step4: under routing process history choose appropriate tab->r/c->open Process Manager

The screenshot shows the Windchill interface for a specific part. The 'Routing/Process History' tab is selected, and the 'Process Status' table is displayed. The table has columns for Name, Assignee, Role, Vote, Comments, Completed By, Due Date, and Date Completed. The data shows three tasks: 'Approve part' by Approver1, 'Review part' by u001, and 'Approve part' by Approver2, all completed on 2024-10-06 13:29 IST.

Name	Assignee	Role	Vote	Comments	Completed By	Due Date	Date Completed
Approve part	Approver1	Appro...			Macharia_organ	2024-10-06 13:29 IST	2024-10-06 13:29 IST
Review part	u001	Desig...			Macharia_organ	2024-10-06 13:29 IST	2024-10-06 13:29 IST
Approve part	Approver2	Appro...			Macharia_organ	2024-10-06 13:29 IST	2024-10-06 13:29 IST

Step5: It opens the work flow of that part just we created before.

The screenshot shows the Windchill interface with the 'Process Manager' window open. The window displays a workflow diagram with steps: Start, Review part, Approve part, and End. The 'Process Details' section shows the process name, category, deadline, and team.

**Process: Assignment-5\_0000000054, part-wf, A.1 (Design)**

**Process Details**

- Category: Default
- Deadline: 2024-10-06 13:29 IST
- Team: Team -0000000054, part-wf, (Design)2012

Note: if we want to add users For revivers and approvers

Step1: Login as a org: create 4 users 2 for revivers and 2 for approvers.

Step2: go to team under product -> add appropriate uses as a participant as shown below

The screenshot shows the Windchill web interface. The browser address bar indicates the URL: `archana.wc/Windchill/app/#ptc1/product/listTeam?oid=OR%3Awt.pdmlink.PDMLinkProduct%3A148043&u8=1`. The page title is "Members" and the breadcrumb is "Products > product-Assignment-5". The "Team" dropdown is set to "Product - product-Assignment-5". The "Members" section shows a list of roles and users. A tooltip "Add participants to team" is visible over the "Approver" role. The list includes:

Roles/Members	Status	Description
Approver		Approver role
Approver1		
Approver2		
Change Admin I		CAI
Change Admin II		CAII
Change Admin III		CAIII
Change Review Board		CRB
Collaboration Manager		Collaboration Manager role
Designer		Designer role
designer1		
designer2		
Guest		This group grants read access to this product without requiring membership. This group is updated automatically based on product membership.
Members		Members role
Option Manager		Option Manager
Package Creator		Package Creator
Product Manager		The group that plays the role: "Product Manager".
Macharia_orgadmin		
Promotion Approvers		Team Members for approving Promotion Requests.

The bottom of the page shows a JavaScript error message: `javascript:popupAction('addUsersToRole_team', 'ptc1/team/addUsersToRole', '...', 'portlet', 'popupedup', 'context', 'product/v24listTeam/v24ORwt.pdmlink.PDMLinkProduct:148043/v24x7Cproject/v24listTeam/v24ORwt.pdmlink.PDMLinkProduct:148043/v24x7Cteam', ...)`. The system clock shows 12:15 on 15-10-2024.