Sponsored Problem Report and Variances

An organization can extend change management process for Problem Reports and Variances to members of an external organization. To distinguish this problem reports and variances that are exposed outside the host organization from their regular counterparts that are not exposed, they are designated “Sponsored”.

The host organization creates a project in ProjectLink to be used as a repository for these sponsored objects.

# Preferences:

There are two preferences that need to be enabled for Sponsored Problem Reports and Variances functionality; they are “Sponsored Problem Report Process” and “Sponsored Variance Process”.

The preferences can be enabled at the site, organization, and/or container level (on the project). Both preferences are under the "Change Management" category.

As a project creator or site administrator, use the preference manager to enable the preferences.

# Object Initialization Rule (OIR)

The OIR defines rules by the objects type at the site, organization, and/or container levels. Such rules stipulate whether the server assigns an attribute’s value or it is entered by the user. For the Sponsored change objects, the attributes of interest include:

* Number
* Folder location
* Life cycle
* Team template

The OIR can be used to manage these attributes and when the rules are defined, careful consideration is needed so that rules defined for projects do not interfere with rules defined for products and libraries.

# Project Team roles:

The Project manager should add Team Roles to the project team based on the roles needed by the Lifecycle and the Workflow Process Templates to be assigned to the sponsored changes. “Change Administrator I” role is needed for sponsored problem reports, “Variance Approvers” role is required if you intend to use sponsored variances.

See the Business administrator guide on how to add roles to the team

# Custom numbering schemes:

By default the number attribute is auto generated for change objects. This can be changed using object initialization rules for the Problem Report or Variance to allow the number to be manually entered or other configurations as supported by Windchill. See Number Schemes Administrator for further details.

# Basic Access Policies for the Project:

These are the minimal policies OOTB that are required to successfully create, edit and view sponsored objects.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Context** | **Object Type** | **State** | **Participant** |  | **Permissions** |
| Project | WTChangeIssue | All | Project Creator | + | Full Control (All) |
| Project | WTChangeIssue | All | Team members | + | Read, Download |
| Project | WTChangeIssue | Open | Team members | + | Create, Modify, Modify Content |
| Project | WTChangeIssue | All | CHANGE ADMINISTRATOR I | + | Full Control (All) |
| Project | WTVariance | All | Project Creator | + | Full Control (All) |
| Project | WTVariance | All | Team Members | + | Read, Download |
| Project | WTVariance | Open | Team Members | + | Create, Modify, Modify Content |
| Project | WTVariance | Under Review | Variance Approvers | + | Read, Download |
| Project | WTVariance | All | CHANGE ADMINISTRATOR I | + | Full Control (All) |

Optional policies recommended for sponsored changes in projects:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Context** | **ObjectType** | **State** | **Participant** |  | **Permissions** |
| Project | WTChangeIssue and WTVariance | All | Organization Administrator | + | Full Control (All) |
| Project | WTChangeIssue and WTVariance | All | Guest | + | Read |
| Project | WTChangeIssue and WTVariance | All | Site Administrator | + | Full Control (All) |

# Project Folders:

By default the folder location is auto generated for change objects; when a new sponsored object is created, it should be saved in the root folder of the project.

This default behavior can be changed. Use the Object Initialization Rules Administrator to change the default.

# Project Template:

An organization can choose to configure suitable rules and policies that meet their business needs using a project template. See the BusinessAdministrator’s Guide for further details.