PCP - How to ... release a PCP Subject for the Initial Review Step

You have a document ready for review, what do you need to do in order to release this document for an Initial Review within the Present-Comment Process (PCP)?

It must be noted here that a formal release between project parties is considered to be the responsibility of the project's document management group: They need to prepare certain release papers, get them signed by the respective managers, add all this information into the project's document management system (DMS) and forward the paperwork to the commenting party.

The release of PCP Subjects here is somewhat similar in nature but is a rather technical activity: The release of a PCP Subject (for example a document or drawing) supports the above formal release process as we will see later. But the important difference is that such a technical release of a PCP Subject transfers the access and responsibility for a PCP Subject from one project party to another. This means in fact that the releasing party cannot any longer make changes to the observations, issues, comments, or responses: It is now the turn of the other party to make comments.

- I assume for the following that you are the owner or the author of that document (or drawing) - called PCP Subject from now on. Furthermore, you have already added your document as PCP Subject into the pmodbase database. This help text now explains in detail which steps you need to take in order to present your document to the commenting party, i.e. how you perform the initial technical release of your PCP Subject.
- You need to have the following information ready:
  - The version or revision code or number of your document or drawing.
  - The initial version or revision code to be used for the release document (which will be created automatically by the pmodbase application): This is often 'A', '0', or '1' - depending on your project's DMS.
  - Any additional information to be included in the release document, e.g. release notes, due date for the return of comments.
- After you haved signed on to the pmodbase application, you should find a button labelled My PCP Subjects (or use the previous link).
- Clicking on this button will lead you to all PCP Subjects to which you have access to, for example:

List of My PCP Subjects (by Category)

[ID]	Title/Description / Project DMS ID	Status	Code	Current Step	At Group	Action Y
Internal Review COM Documents						
[2]	My First PCP Document TEST(COM=KB%PM200&AEC_20160613_TDD00001	new	?	Initial Release	COM	Q / - +

- Select the PCP Subject you want to release and click on the [Q] button on the right column of that row. This will open up a form with all information about the current status of your PCP Subject:

On the top of this form, you find the attributes of the PCP Subject: Title, Document Codes, Owner and Deputy Groups and Accounts, and the current Status.

Below that, you see the information about the current step, i.e. the Initial Release. These fields are currently empty and you need to provide the necessary information before the PCP subject can be formally released for the next step in the process.

Click the Edit button to open the form for editing.

Some fields in the upper part of the form can be modified at this time others cannot be changed here: For example, the commenting party, owner and deputy of this process there can only be changed by someone in that party.

The first field in the lower part of this form, **Subject Status as of**, is not required for the review of documents although you can enter the document's creation date here for information (if given, it should correspond to the date on the document itself.

Subject Version is a required field for this step: Enter here the version or release code / number for the document being released. This is most likely the initial code 'A' or '0' depending on the DMS you

Show PCP Subject Details

[ID]	[2]
PCP Category	Internal Review COM Documents
Title/Description	My First PCP Document
Notes on this Subject	
Project DMS ID	TEST(COM=KB%PM200&AEC_20160613_TDD00001
Presenting Project Group	COM - Telecommunication Systems
Owner (Presenting Group)	1 Admin
Deputy (Presenting Group)	
Commenting Project Group	COM - Telecommunication Systems
Owner (Commenting Group)	1 Admin
Deputy (Commenting Group)	
Project DMS ID for PCP Report	TEST(COM=KB$Q%PM200&AQC_20160613_TDD00002
Subject Status	new
Current Step: Initial Release	
Subject Status as of	
Subject Version	
PCP Report Version	
Internal Notes for this Step	

are using in your project. This code must correspond to the (normally) last part of your document's code.

PCP Report Version is also a required field: Enter here the initial version or release code for the release document to be created for this release. Again, this is often 'A' or '0' depending on the document management system you are using.

Internal Notes for this Step is a field for information which will only be shown to the releasing (the presenting) group. For the initial release, you probably do not need to add anything there.

Release note can be used to add information for the release document being created.

Next Review Due Date can be used to set a date when the review comments are expected to be returned.

Once you have completed the form, click Update now: This will again show you the details of your PCP Subject and the current step data.

In order to perform the technical release, click the Release button now. This will open a new window with the release document and an extra message telling you that the PCP Subject is now released and that you should print the following screen.

Print Show Index

Present-Comment Process Release Report

Project DMS ID - Version:	TEST(COM=KB$Q%PM200&AQC_20160613_TDD00002_0
Subject:	**My First PCP Document**
Project DMS ID - Version:	**TEST(COM=KB%PM200&AEC_20160613_TDD00001_A**
as of:	2016-06-14

Released by User (Account):	Admin (admin [1])
at:	2016-06-14 09:12:45 UTC
Reason:	Initial Release
Release Notice:	Feedback is urgently needed. Thank you.
Reply requested until:	2016-06-21

The report does not contain any items to list.

- Click on the <u>Print</u> link on top of the page and use you browser's print feature to create a printed (or PDF) version of this page. Save this release document and ensure that it is added to your DMS (either by yourself or by your document management group).

This completes the release of this PCP Subject. Now it is the commenting group's turn to add comments, observations, issues and make an assessment of the document.