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8 Release process

8.1 Fundamentals

In Teamcenter, processes (workflows) are implemented for several release levels. A release of a revision in Teamcenter means that this revision can no longer be changed and receives a certain status. In addition, a release date and the releasing person are noted on the revision and a neutral format generation takes place, where the formats can be selected. Possible formats are JT, PDF, Tiff, STEP, IGES, DXF and DWG.

A set status cannot be reset. After a revision has been released, a new revision must be created in order to make changes. Conversely, a new revision can only be created if the previous revision has a status.

The following release levels are provided:

Engineering Release (ER): This release is used to define a revision in the PLM system. Optionally, a „self-release“ without check („review“) or a check according to the „4-eye-principle“ is carried out.

When the release is set to „ER“, there is no SAP transfer. A new revision can be created without a change notice (change notice or simply change).

Preseries (pre-series, PS): This release requires a check according to the „4-eye-principle“. The auditor can be selected by the initiator of the workflow, but must come from his group („KV“) and have the role „Design Admin“. This is preset by the workflow. When releasing after „PS“, an SAP transfer takes place. The SAP system is automatically selected on the basis of the current group of the releasing person, for example, in the group „EI“ PE1 is transferred to the SAP system.

A distinction is made between „initial release“ and „subsequent release“. With the first release, a revision of a part is set to the status „PS“ for the first time; this does not have to be revision 00, since only the status „ER“ can be set beforehand. For a follow-up release, a change is mandatory so that the changes can be tracked.

8.2 Engineering Release (release after "Er")

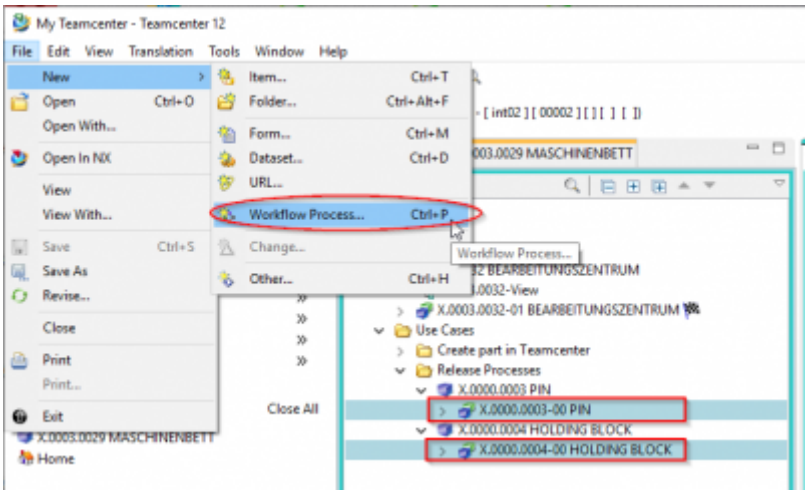
During release, certain conditions are checked without which the workflow does not start. These are conditions for a design release:

- This is an object of type „FFG EngItemRevision“.
- All mandatory attributes are filled in
- The naming was selected from the naming catalog (naming ID is set).
- For an assembly, all components of the first stage must have the same or a higher release status, or the components must be contained in the same release workflow.
- All revisions have no status (are in „Working“).

To make a design release, proceed as follows.

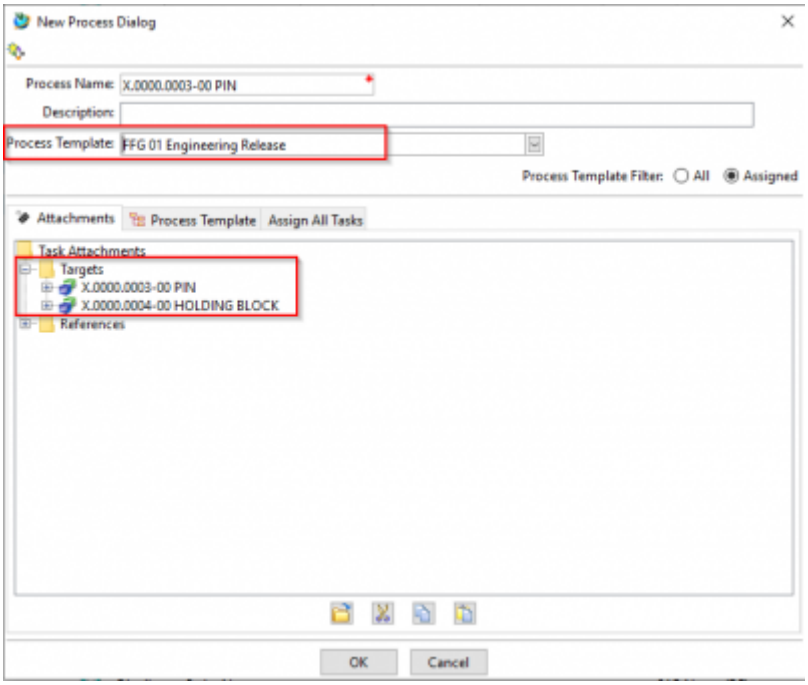
Select one or more revisions to be released. These can be individual parts or assemblies.

Select File → New → Workflow Process... or press Ctrl+P or Ctrl+P on the keyboard.



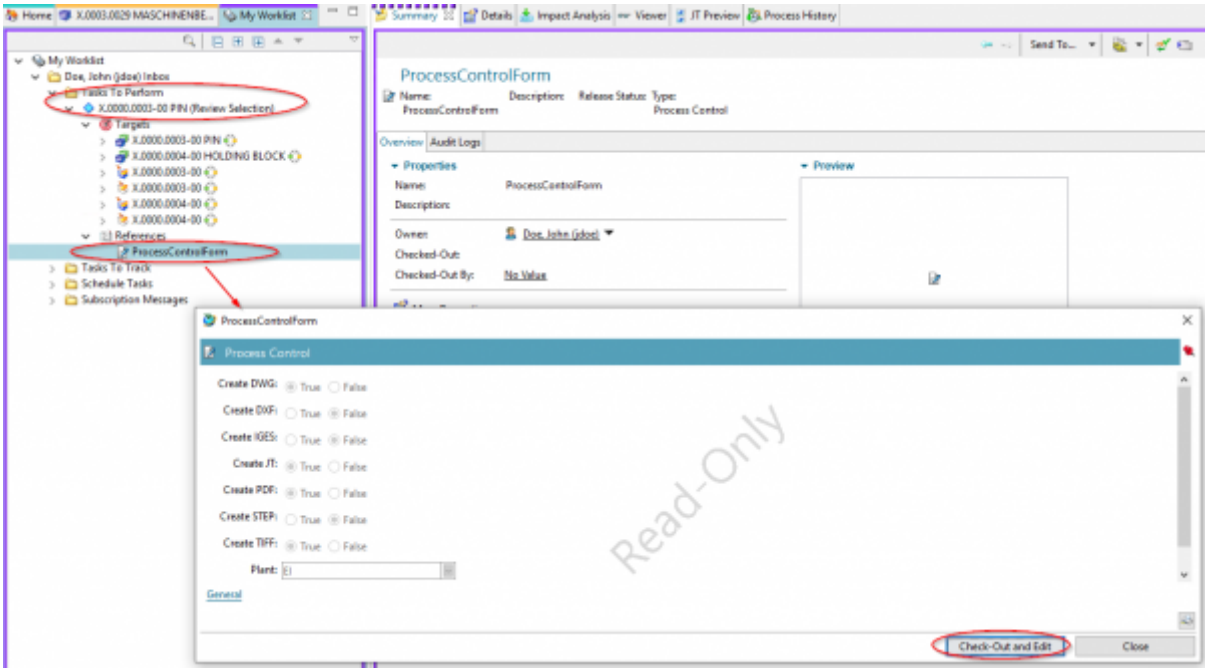
The workflow „FFG 01 Engineering Release“ should already be selected. If not, select this workflow from the list of templates.

No further entries need to be made. However, it is possible to include or remove further revisions as so-called „targets“ in the workflow. You can also assign a different name and/or a description (but this is not necessary or usual).

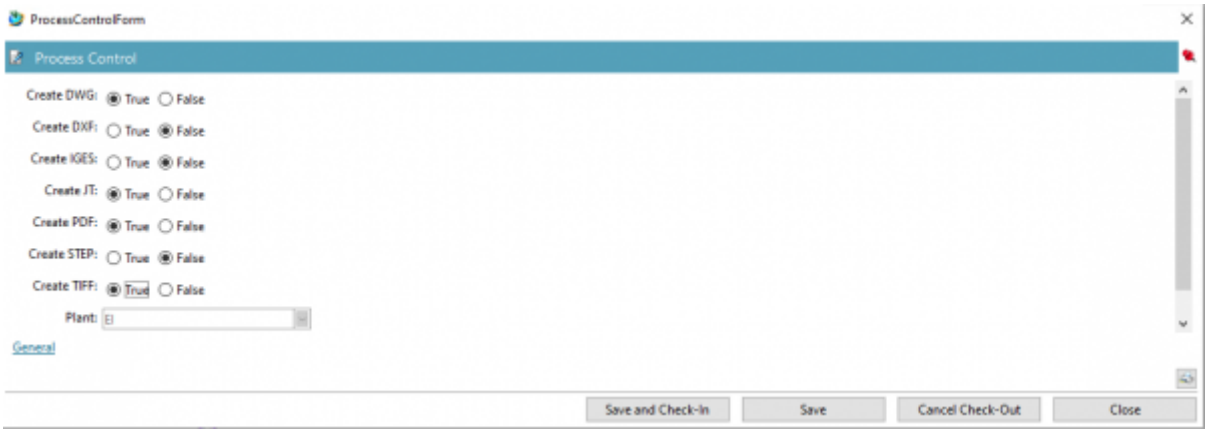


In Teamcenter Navigator, an icon indicates that an object is in a workflow. Press OK. If all conditions are fulfilled, the workflow starts and you can see the started workflow in your inbox My Worklist in the Teamcenter Navigator under {:uc_approvalprocess_en_004.png?nolink|}} „Task to be executed“. This is located in the process step „Review Selection“.

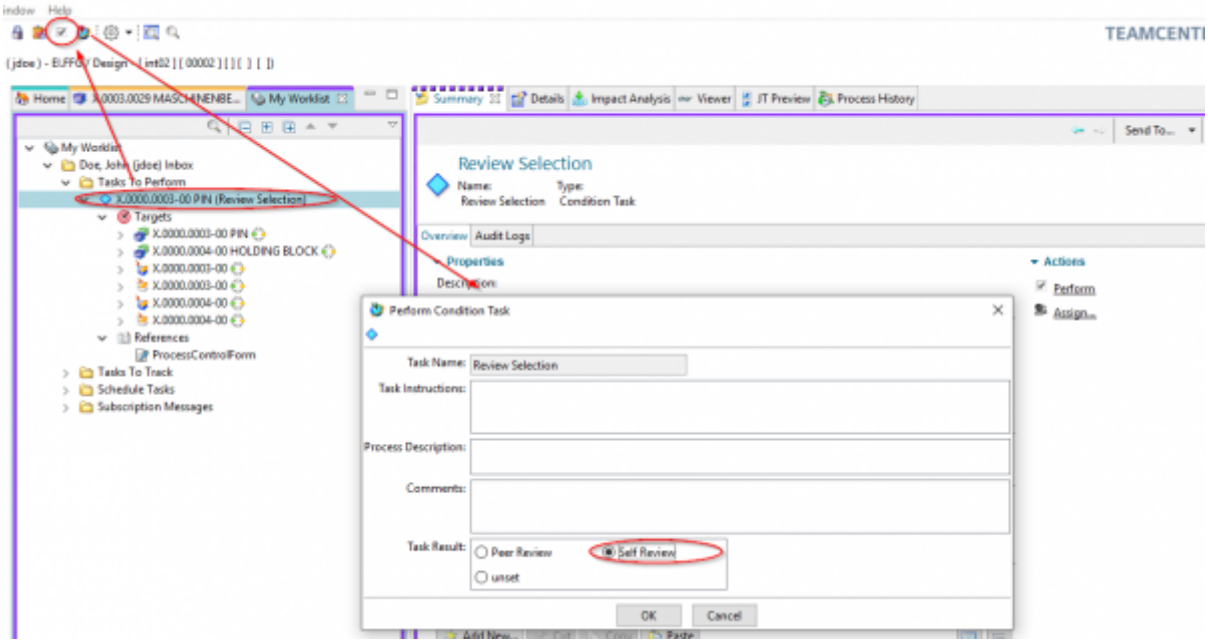
First open the entry „References“ and double-click on the form „ProcessControlForm“.



You can now select the desired neutral formats. The default formats are JT and PDF. If the default settings are sufficient, you can skip this step, otherwise press „Check-Out and Edit“.

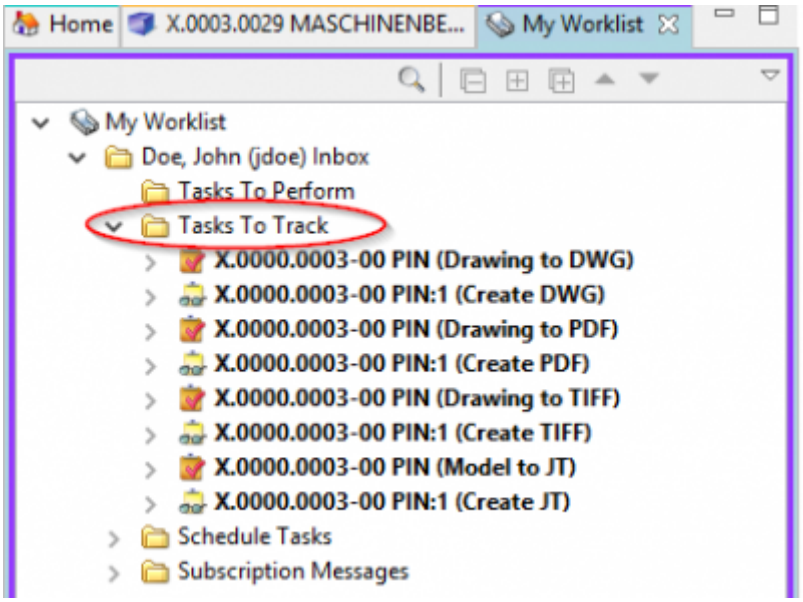


Select the neutral formats and press „Save and Check-In“. Then press the „Perform Task“ button in the upper bar of the Teamcenter Navigator.

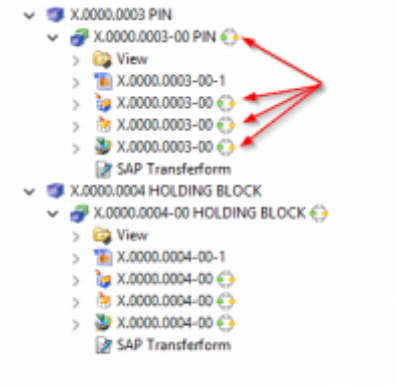


A menu opens in which you can select whether a self review or a peer review is to be performed.

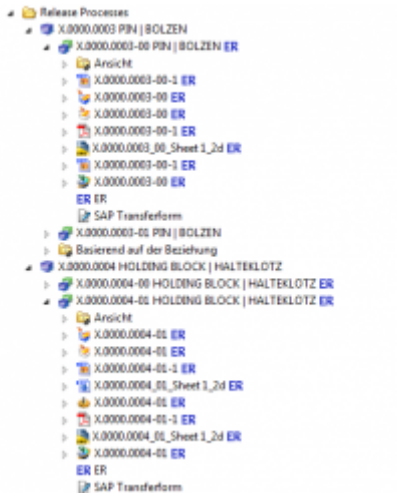
Press „Self Review“. No further steps are necessary. In the entry „Tasks to Track“ you can track the workflow or the different tasks, e.g. you can see the subprocesses of the neutral format generation.



In the Teamcenter Navigator, a symbol xxxxxx indicates that an object is in a workflow. This means that the object is write-protected, changes are not possible.



As soon as the workflow is completed, the release status (in this case „ER“) is displayed as an icon and text on the objects. In addition, the generated neutral formats are attached to the revision as datasets and have also been released.

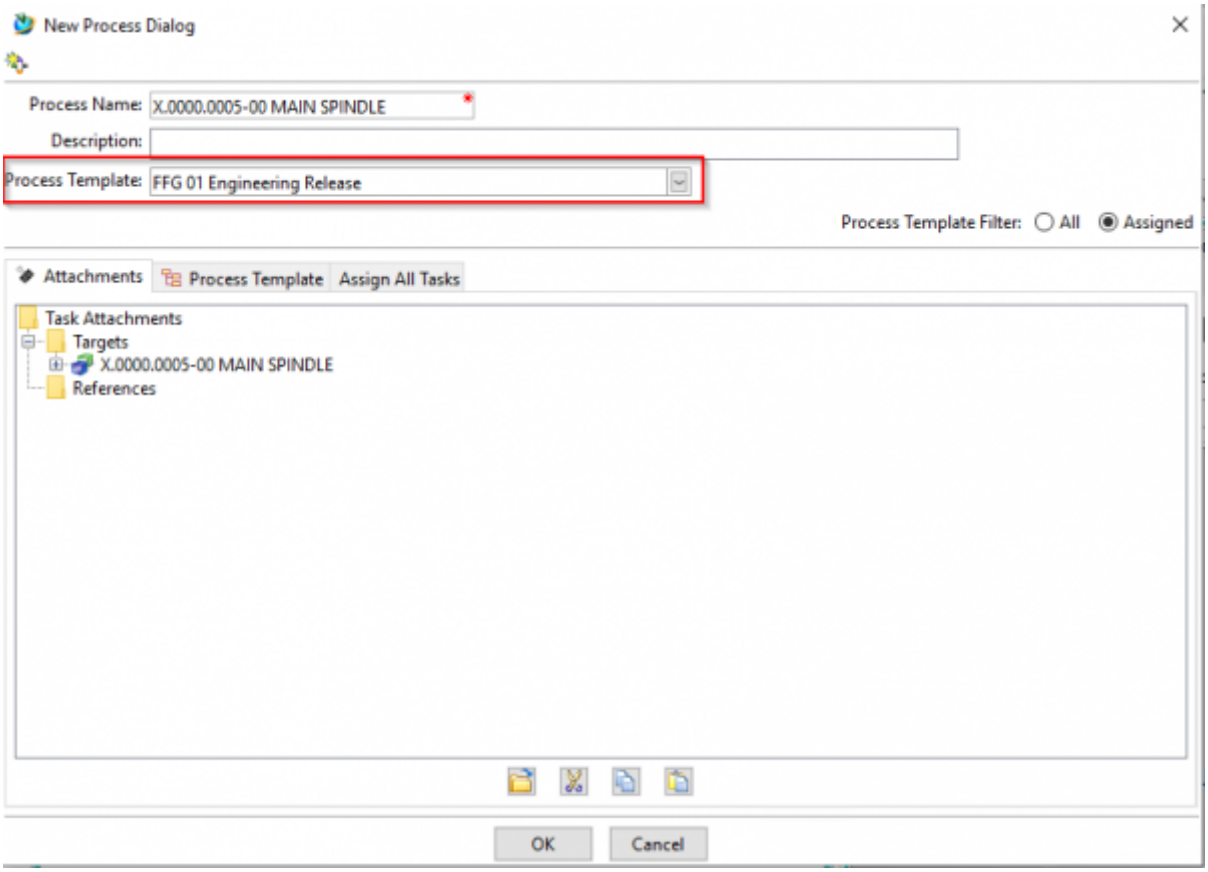


8.3 Engineering Release (release after "Er") for parts with AutoCAD drawing

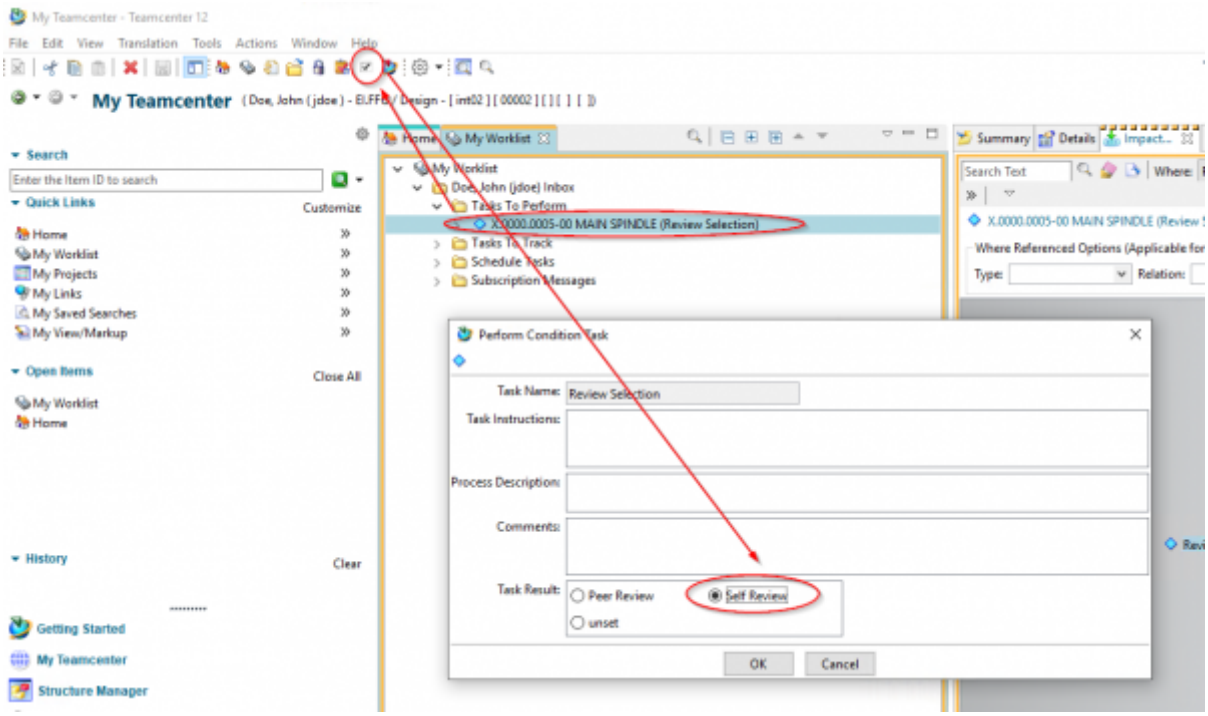
The approval process of a part with an AutoCAD drawing is essentially identical to the approval process of all other parts. The only difference is that a Tiff is always generated from the AutoCAD drawing.

To release such a part select one or more revisions and select „File → New → Workflow Process...“ or „Ctrl+P“ or „Ctrl+P“.

In the following dialog select the workflow „FFG 01 Engineering Release“, if it is not already selected.

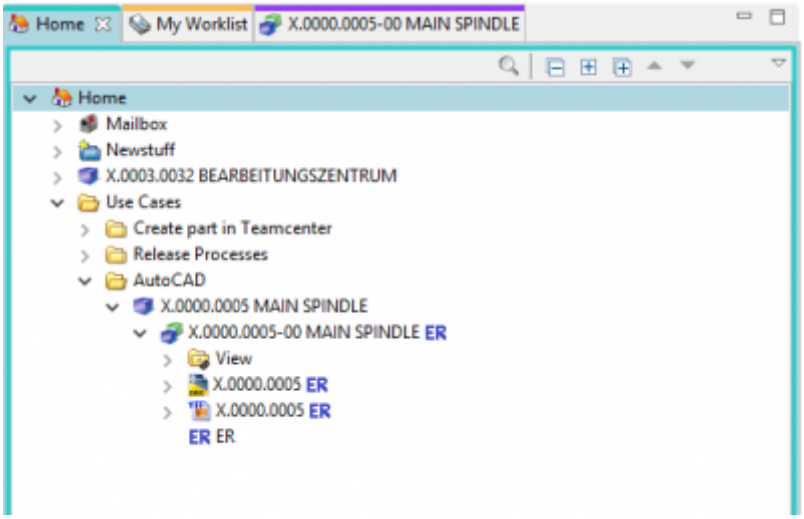


Press „OK“.



Select the new task in your inbox and press the „Perform Task“ button.

In the following dialog select „Self Review“ and press „OK“.



After a while the revision and the AutoCAD dataset get the status „ER“ and a TIF file was created which also got the status „ER“.