

Getting Started with Release Procedures

by Eric Horn

Creating and setting up release procedures, found in Pro/INTRALINK, is a way to better implement your company's current controls and enforce its business rules. However, doing so is a complex issue. Your company, no doubt, has an established design cycle to follow before objects are manufactured or shipped. The challenge is to integrate your current engineering change request (ECR) process with INTRALINK's release procedures, without causing many changes to the overall procedure. With some ingenuity, this can be accomplished. The advantage is that any CAD/CAM changes to objects stored within INTRALINK can reflect the ECR changes. The INTRALINK database then will have a searchable record of all ECRs processed through your CAD/CAM departments. INTRALINK only can control the ECR process within the mechanical engineering realm. This is because it is engineer-centric and not equipped to be a viable application for use by other departments.

First, take the time to find out if using INTRALINK's release procedures makes sense for your company. Consider your current design cycle and ask yourself the following questions. (If your company uses more than one design cycle, review the questions for each cycle.) If you do not know the answers to the questions, get them before you try to implement your processes into INTRALINK; changes and re-work can be time-consuming.

- What stages must a design pass through before it goes out the door?
- How does a design move from one stage to the next?
- Is the design reviewed? If so, by whom? At what point in the process?
- Who needs to know that a request has been made to change a design?

- Who needs to know that the design stage has been changed?
- Does the process change at different stages of the life of the project?

The basics

There are two actions to consider when defining a release procedure. The first is the creation of the procedure itself, done through the Release Procedure category of administration. To create a release procedure, select **New** from the Release Procedure category in administration. The New Release Procedure window will appear. Enter the name of the new procedure and a description if appropriate. Select **OK** to create the release procedure.

The second action is to assign the procedure to either a promotion action or a demotion action within a folder, done in the Folder category of administration. "Promoted to" and "demoted from" are important phrases in understanding how release procedures behave. During a promotion or demotion action there are two release levels involved—the source and the target. The source release level is the current level of the object. The target release level is the level to which the object is being promoted or from which it is being demoted.

When an object is promoted, the release procedure defined on the target release level is initiated. Intuitively, you would think that the same logic applies for demotions. But in fact, when an object is demoted, the procedure defined on the source release level is initiated. Hence, the terminology "promote to" and "demote from."

When you create a release procedure you also can create a voter assignment. This is a list of INTRALINK users or groups who must

review a requested release level change and either approve or reject the change. When you create an assignment, you choose one of the pre-defined voting methods to drive the procedure. Voting methods are defined as: any, majority or unanimous.

Using the "any" method means that if any of the selected voters approve the requested change, the voter assignment is completed as approved. The "majority" method states that a majority of the voters listed need to approve the request before the voter assignment is completed as approved. The "unanimous" method requires that all assigned voters approve a request before the assignment is completed as approved.

Rejecting a request works differently. No matter which voting method is assigned, if any voter rejects the request, it is immediately rejected. This is intuitive for the "unanimous" method. But the same behavior also is applied for the "any" and "majority" voting methods. This is because any vote for rejection of a design change request should be investigated further, in order to ensure thorough and strict design controls.

Creating a voter assignment

From the users/groups sections, double-click the correct folder icon to expand the Users Folder and/or the Groups Folder. Select the users or groups that will be required to evaluate and vote on an action (promote/demote). Providing a description is optional, but always recommended, so that you can keep track of what the group represents. Once you complete the necessary input, select **OK** to create the voter assignment.

Each release procedure can have multiple voter assignments. Each new assignment becomes another level of control to ensure that a request is correctly evaluated. By default, a new assignment is added onto the pre-existing list to become the next increment level. You can, however, change the order in which the assignments are executed. Highlight the assignment that you want to move, and use either **Move Up** or **Move Down** to change the order.

Unlike some other functions within INTRALINK administration, voter assignments can be modified at any time. Select the assignment you desire to modify and select **Modify**. The Add New Voters window will appear just as if the **Add** were selected. Make changes to the assignment and then select **OK**. Use **Remove** to remove a voter assignment.

Notification and distribution lists

The lower section of the Release Procedure category is used to define the notification and distribution lists. Although the users/groups on the notification list do not vote, they receive an email message when a release procedure request is initiated or completed. The users/groups on the distribution list also do not vote, but they receive an email message *only* when a release procedure request is completed.

Again, go to the users/groups sections and expand the Users Folder and/or the Groups Folder by double-clicking the corresponding folder icon. Select the users/groups who will be included in the notification list or the distribution list. Use the double-arrow buttons to move the desired users into the appropriate lists. Use

the upper set of arrows for the notification list and the lower set for the distribution list.

I hope this information will help you and your company to develop your own release procedures within INTRALINK. One final word of advice: Try to use folder inheritance when at all possible. Assign release procedures to top-level project folders, because the procedure might change based on the project requirements down the road.

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