

# Advanced Photon Source

PROCEDURE	Page 1 of 7
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## Releasing APS Purchased Parts

### Section Where Used:

This procedure is used to release models obtained from vendors or used to represent the parts purchased from vendors into the Windchill / Vault or equivalent database.

### Changes made in this revision:

- No changes made to this procedure since its last review

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<b>PROCEDURE</b>	Page 2 of 7
ICMS Content ID:	APS_1286337
DNS #:	APS-PPR-ADM-000-A022-000010
Revision #:	7

## Table of Contents

1	INTRODUCTION .....	3
1.1	Purpose.....	3
1.2	Scope.....	3
1.3	Applicability .....	3
1.4	Type of Procedure.....	3
1.5	Definitions .....	3
2	PROCEDURE.....	4
2.1	Modeling Steps .....	4
2.2	Approval Steps.....	4
3	FEEDBACK AND IMPROVEMENT .....	7

## Releasing APS Purchased Parts

### 1 INTRODUCTION

This procedure is used to release models obtained from vendors or created to represent the parts purchased from vendors into the Windchill / Vault or equivalent database.

#### 1.1 Purpose

To document the process of controlling and releasing vendor models or models generated to represent the vendor parts

#### 1.2 Scope

- Representative Models Only

#### 1.3 Applicability

This procedure applies to APS personnel who use models obtained from vendors or create models to represent the vendors purchased parts.

This procedure is not used to release drawing files received from vendors to document as-built work. Drawing files received from vendors require the use of the Releasing AES Drawings ([APS 1281567](#)).

#### 1.4 Type of Procedure

Step-by-step procedure.

#### 1.5 Definitions

DCN	Document Change Notice
Windchill / Vault	CAD drawing management system
Release level	One of three values – Work in Progress (WIP), Pending, or Released
DaD	Design and Drafting Group
Responsible Person	The individual creating the model that represents the vendor part use in their assembly

<b>PROCEDURE</b>	Page 4 of 7
ICMS Content ID:	APS_1286337
DNS #:	APS-PPR-ADM-000-A022-000010
Revision #:	7

## 2 PROCEDURE

### 2.1 Modeling Steps

- 2.1.1 Responsible person creates model file of vendor parts.
  - 2.1.1.1 This can be a model obtained from the vendor or one created by the responsible person to represent the purchased part.
  - 2.1.1.2 Metadata is to be completed for the model. Including the vendor information on lines 1 to 4 of the title block information.
  - 2.1.1.3 Material / Model properties for the proper material must be assigned to the part. If the file is an assembly each part of the vendor file must have material / model properties assigned to it. (This is not the metadata data field called Matl\_Des it is for the mass properties calculation of the model.)
  - 2.1.1.4 All Datum Plane/Axes/and Coordinate System Layers must be hidden.
    - 2.1.1.4.1 Layer status must be saved for this to be permanent.
  - 2.1.1.5 All hardware (Nuts, Bolts) shall have component interfaces defined as placement not receiving or either in them, using Insert first and Mate second to assist in controlling the part placement. Please name the interface properly to define its use. Please do not model threads either solid or cosmetic on any parts.
- 2.1.2 Responsible person checks the model created into Windchill / Vault using the vendor's part number as the model name.
- 2.1.3 Responsible person assigns a release level of WIP to the model in Windchill / Vault
- 2.1.4 Once the model is completed, the responsible person initiates the approval process.

### 2.2 Approval Steps

- 2.2.1 Vault Steps
  - 2.2.1.1 Select the drawings, assemblies, parts and Purchased Parts to be released in Commonsplace.
  - 2.2.1.2 Add the files to an ECO:
    - 2.2.1.2.1 Select "Actions" or Right Click
    - 2.2.1.2.2 Select "New Change Order".
  - 2.2.1.3 Enter the Title Information and Description of changes
  - 2.2.1.4 Select the Appropriate Routing for the ECO.
  - 2.2.1.5 Select "Save" to commit the ECO.
  - 2.2.1.6 Edit the Routing information for the appropriate approvers.
    - 2.2.1.6.1 The following people are to be included in the approval routing, DaD Quality Assurance, the Responsible Engineer, their Group Leader or Responsible Project Leader or CAM, as appropriate, the DaD Group Leader and DCN Approver.
    - 2.2.1.6.2 Select "Save" to save the edited routing.

2.2.1.6.2.1 If you receive an error message you do not have the proper roles assigned to the routing, verify step 2.2.1.6.1 and re-save.

2.2.1.7 Submit the package for approval.

## 2.2.2 Windchill Steps



<b>PROCEDURE</b>	Page 6 of 7
ICMS Content ID:	APS_1286337
DNS #:	APS-PPR-ADM-000-A022-000010
Revision #:	7

- 2.2.2.1 Browse to the files or “Problem Reports” you wish to resolve, change or release, select them, and then start an ECO by selecting “Actions”, “New”, “New Change Request”. Enter a descriptive name under “Name” and select “Next”.
- 2.2.2.2 The next screen shows the changing objects that will be processed on the ECO, here you can add additional files to the release / revision process. All files need a reason for the change under the “Comments” section individually. Only select related objects, do not use a single workflow to revise/release multiple projects. Once you have all the objects you plan on revising or releasing Select “Finish”.
- 2.2.2.3 A Confirmation pop up will appear, select “Submit Now” to activate the Change Request. The Change Request will be sent for approval; once it is approved then the originator must generate a Change Notice.
- 2.2.2.4 The system will send an email to the originator with a link to the “Create New Change Notice” location. Select the link in the email or the link in “My Tasks” inside of Windchill, once inside the Change Notice select “Action on Subject”, then “New Change Notice”.
- 2.2.2.5 Select the “Propagate Information” toggle and the description from the change request and the list of “Affected Objects” will populate. After this is verified, select “Next”. Then under the Implementation Plan section select the “Edit/Pencil”.
- 2.2.2.6 Select “Next” to open the Change Task window where you have to list the “Affected Objects”, objects you plan on working on, and the “Resulting Object”, the files that will have new revisions generated. If you propagated the objects, “Affected Objects” will be filled in automatically.
- 2.2.2.7 If there is a blend of new and old objects, each step will need to be done to the appropriate content.
  - 2.2.2.7.1 If the files are new content: Select all files, then “Copy” to clipboard and “Paste” into “Resulting Objects”. Select “Finish”. This is to release new objects only. REVISING Objects, continue to the next step.
  - 2.2.2.7.2 CAUTION If you are revising existing content: After this, even if the Change Notice is cancelled the files will still be “Revised”, the files do not revert back without administrator intervention.
  - 2.2.2.7.3 If you are revising existing content: Select all objects, then Select “Revise”. The “Revise” window will appear, ALL items in this table will be revised. REMOVE items you do not want revised (i.e., “Purchased Parts”) from this table.
  - 2.2.2.7.4 Select “OK” once you are sure of the file list.
- 2.2.2.8 The process of adding a change task is complete, select “Finish” and “Submit Now”. This will put you back at your home page.

<b>PROCEDURE</b>	Page 7 of 7
ICMS Content ID:	APS_1286337
DNS #:	APS-PPR-ADM-000-A022-000010
Revision #:	7

- 2.2.2.9 The changes can now be made to the files that are “Revised” by the change notice, in other words you are creating the “Resulting Objects”. Once the changes are complete the same “Change Notice” is used for the approval and release of the files.
- 2.2.2.10 Once all the changes are done and you are ready to release the objects, go to your Home Page you will see a task “Complete Change Notice Task”, Select it. Under the Task area, you need to select “Complete Task” to initiate the Change Notice approval workflow.
- 2.2.2.11 The release process is now underway, it will go for approval to the checker and be released at the end of the process.

### 3 FEEDBACK AND IMPROVEMENT

If you are using this procedure and have comments or suggested improvements for it, please go to the [APS Policies and Procedures Comment Form](#) \* to submit your input to a Procedure Administrator. If you are reviewing this procedure in workflow, your input must be entered in the comment box when you approve or reject the procedure.

Instructions for execution-time modifications to a policy/procedure can be found in the following document: Field Modification of APS Policy/Procedure ([APS 1408152](#)).

\* <https://www.aps.anl.gov/Document-Central/APS-Policies-and-Procedures-Comment-Form>