

Complete CAD, LMS or MES Task

1.0 PURPOSE

This procedure defines the requirements for completing CAD, LMS, or MES Pre- and Post-Release tasks that are automatically generated as part of the Windchill Change Order workflow.

2.0 REFERENCES

2.1 Applicable Documents

Number	Title
87126	Guide for Completing CAD or MES Pre-Release Task
87127	Complete LMS Task

2.2 External References

Number	Title
N/A	N/A

3.0 RESPONSIBILITIES

Function or Title	Responsibility
Change Manager (CM)	<ul style="list-style-type: none"> Create and manage the Change Order. Create manual Pre- and Post-Release Ad hoc Task
Task Owners	<ul style="list-style-type: none"> Complete the task according to the task instructions. Upload any required objective evidence. Upload final copy of the PDF file.

4.0 DEFINITIONS

Term	Definition
Attribute	Fields populated on an object that define its use.
Change Activity (CA)	A change implementation activity used to assign tasks for individuals to complete and be reviewed prior to Change Implementation Board review.
Change Order (CO)	An object that allows planning, managing, monitoring, and approval of new/revised objects of the change activities.
Document Object	An object that consists of primary content e.g., Word document, Excel file) for a controlled document.

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Term	Definition
Object	A document, part, ECR, CO, CA, etc., that is identified in Windchill.
Part Object	A part controlled in Windchill.
Pre-Release Task	Windchill generated tasks defined from the objects types, attributes, states, and task determination questions upon approval of the Change Order. Tasks must be completed prior to release of the Change Order.
Post-Release Task	Windchill generated tasks defined from the objects types, attributes, states, and task determination questions upon release of the Change Order. Tasks are completed after Change Order release but before Change Order is Closed.
Windchill (WC)	Product Lifecycle Management (PLM) system used to manage objects associated with the lifecycle of a product from its conception to its obsolescence.

5.0 FLOW CHART

N/A

6.0 REQUIREMENTS

6.1 CAD Task Owner

Step	Action
1	Windchill generates a Pre-Release Task after Change Order (CO) approval. A Pre-Release Task is automatically generated by the workflow based on the object types, attributes, states, and task determination questions.
2	The CAD Task Owners is assigned based on CO attribute: Does change require an update to a Drawing = Yes. <ul style="list-style-type: none"> • Email notification is received by the Task Owner when a task is assigned. • Assigned tasks are listed in My Tasks.
3	Review the instructions in the task to determine the work to be completed.
4	Complete the task according to the task instructions. Upload a final copy of the PDF file.
5	Verify that primary content has loaded and can be opened.
6	Document that the task has been completed. Comments are entered as applicable.

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6.2 LMS Task Owner

Step	Action
1	Windchill generates a Pre-Release Task after Change Order (CO) approval. A Pre-Released Task is automatically generated by the workflow based on the object types, attributes, states, and task determination questions.
2	LMS Task Owners will receive an email notification when a task is assigned. The assigned tasks are also under My Tasks.
3	The task includes instructions on what is required in order to complete the task. Comments are entered as applicable. The Task Owner is responsible for completing the task, per 87127, Complete LMS Task.

6.3 MES Task Owner

Step	Action
1	Windchill generates a Pre-Release Task after Change Order (CO) approval. A Pre-Released Task is automatically generated by the workflow based on the object types, attributes, states, and task determination questions.
2	MES Task Owners will receive an email notification when a task is assigned. The assigned tasks are also under My Task.
3	The task includes instruction on what is required in order to complete the task. Comments are entered as applicable.
4	The Task Owner is responsible for completing the task. MES Task Owner updates the Part Object and BOM attributes and also attaches the executed file to the Change Activity.