

Protecting Your Data Using States in TDM

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By Larry Carpenter, P.E.

Lab CAD Manager, Fermilab

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Important Definitions

Item Version – Any version of a CAD item stored in TDM. This includes all versions, old & new, of drawings, parts, assemblies, and FEMs.

State – A designation within TDM for an item version that is usually associated with a workflow process. When used in conjunction with roles and access privileges, it controls access to item versions.

Background

States are used in TDM to control access to item versions. By default, everyone has full access (Read, Copy, Write, Delete, & Approve) to all item versions in a TDM. This default State is called an “INITIAL” State with full RWDA privileges for everyone. Additional States are used to specify alternate access privileges.

One important use for States is to apply a “RELEASED” State to an item version when the item version is released. This would prevent the item version from being modified or deleted within TDM.

Additional States can be defined for other purposes as well.

States Available at Fermilab

There are currently 3 States defined for Fermilab's TDMs. These are:

State	Description	Access Privileges	Comments
1-INITIAL	Default state of new items.	RCWDA	All new item versions are assigned this State. Permissions are wide open.
2-PROTECTED	Protected from deletion.	RCW A	Removes 'Delete' privilege from item. Users can 'Approve' item versions TO and FROM this State.
3-RELEASED	Approved & released.	RC A	Removes 'Write' & 'Delete' privileges. Users can only 'Approve' item versions TO this State.

Use the "PROTECTED" State for item versions that you want to retain in the future for historical reasons but are not released data; design reviews, milestones, etc.

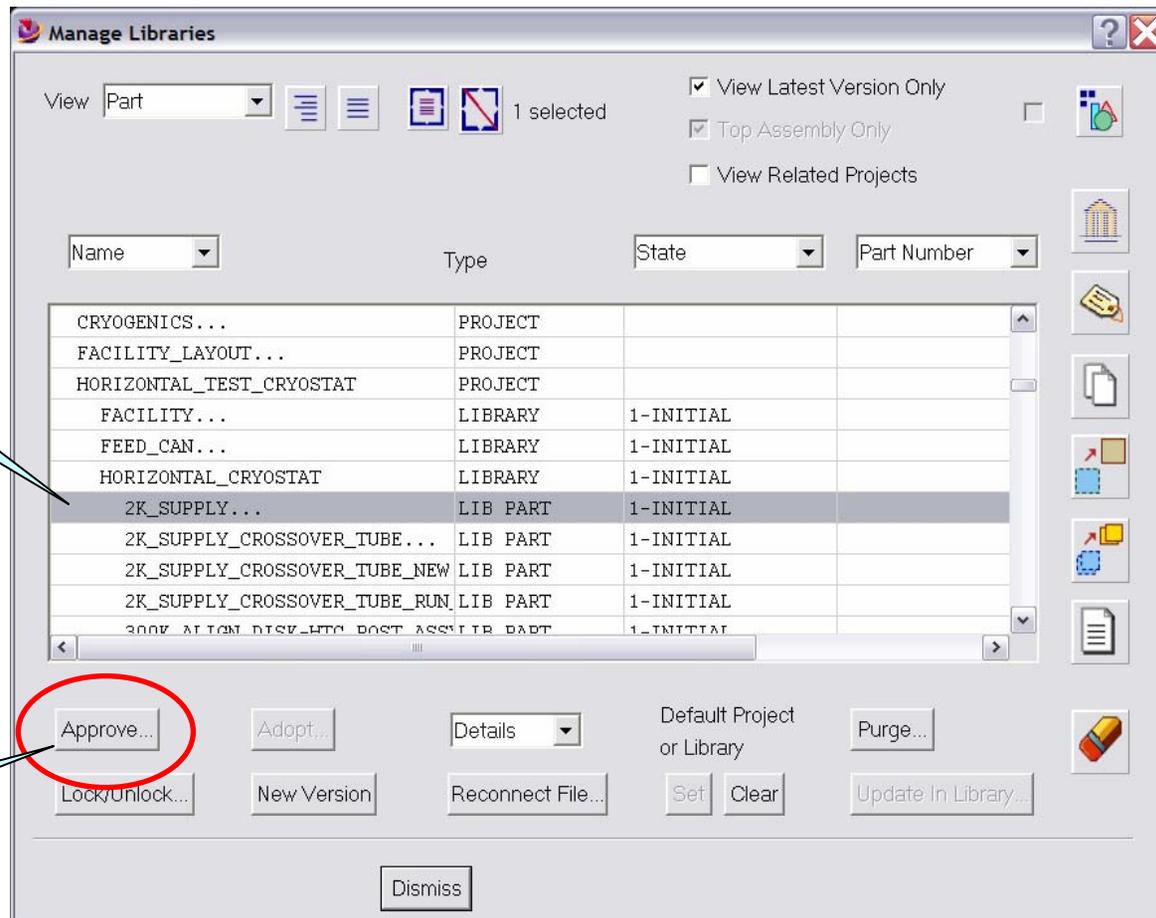
Note that item versions in this State will not be deleted during a Library Purge operation. It is your responsibility to delete these protected versions when they are no longer needed to prevent the database from becoming bloated with old data.

Use the "RELEASED" State for item versions that have been released.

Changing States in TDM

To Approve item versions to another State,

1. Highlight the item version(s) in the “Manage Libraries” form.
2. Click on the “Approve” button.

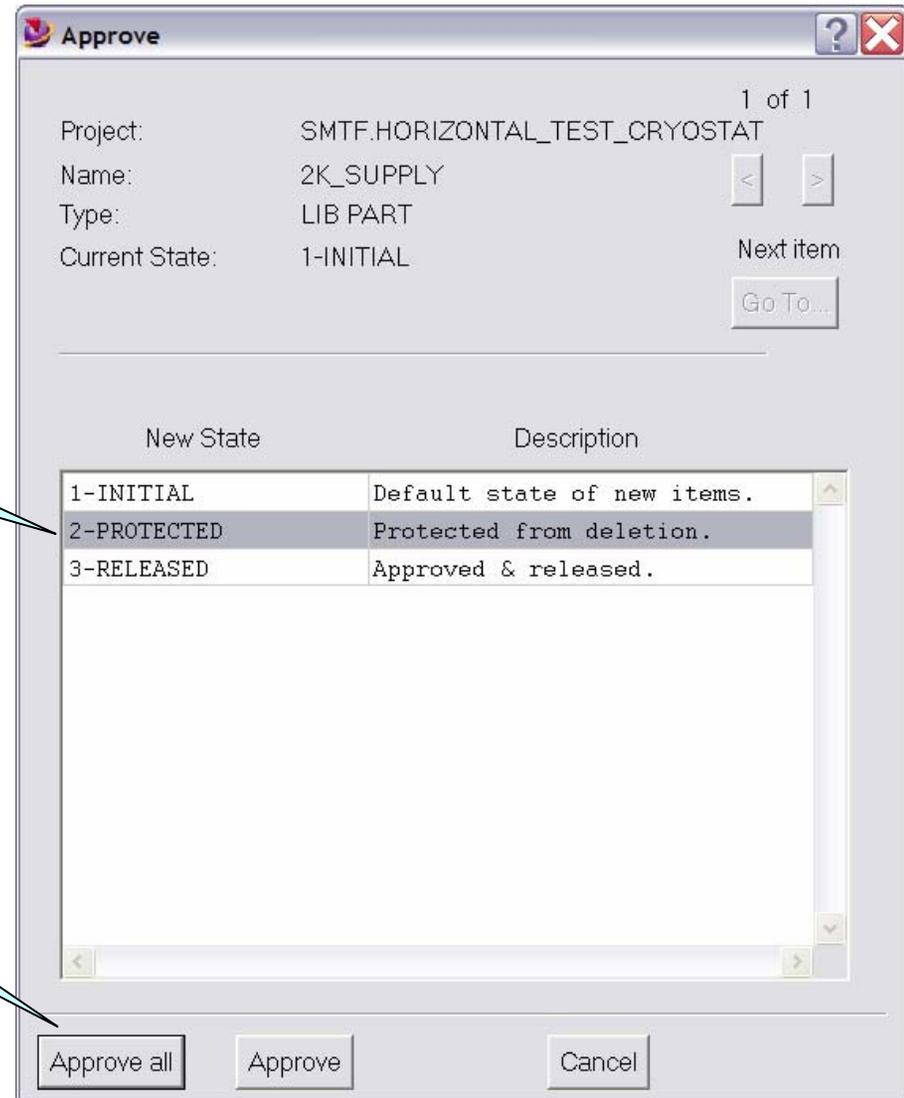


Changing States in TDM

3. Select the new State.

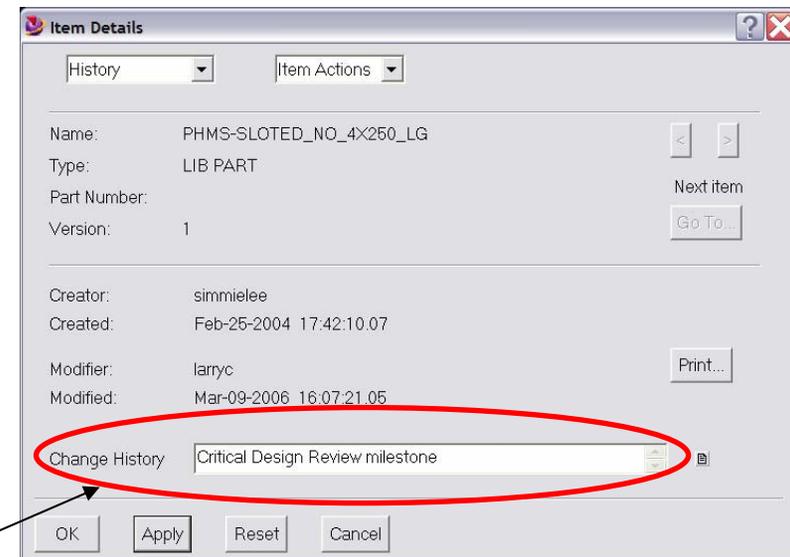
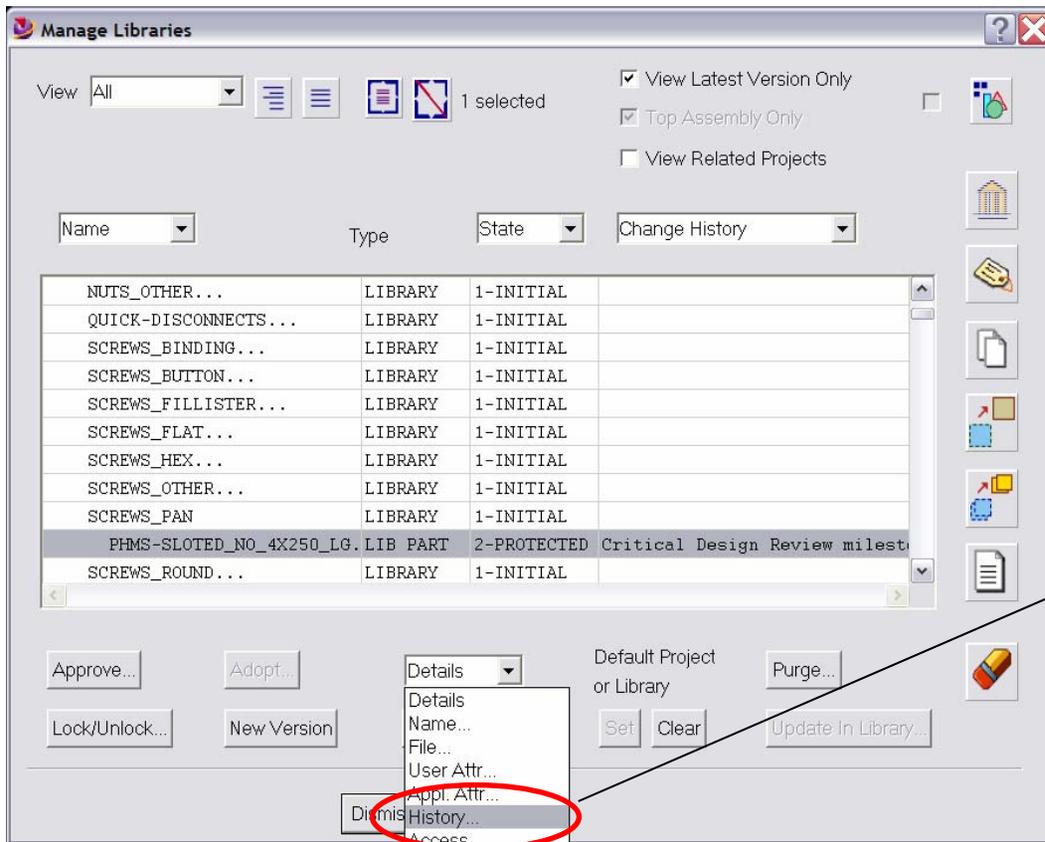
4. Click on “Approve” or “Approve All”.

The item version is now Approved to the new State!



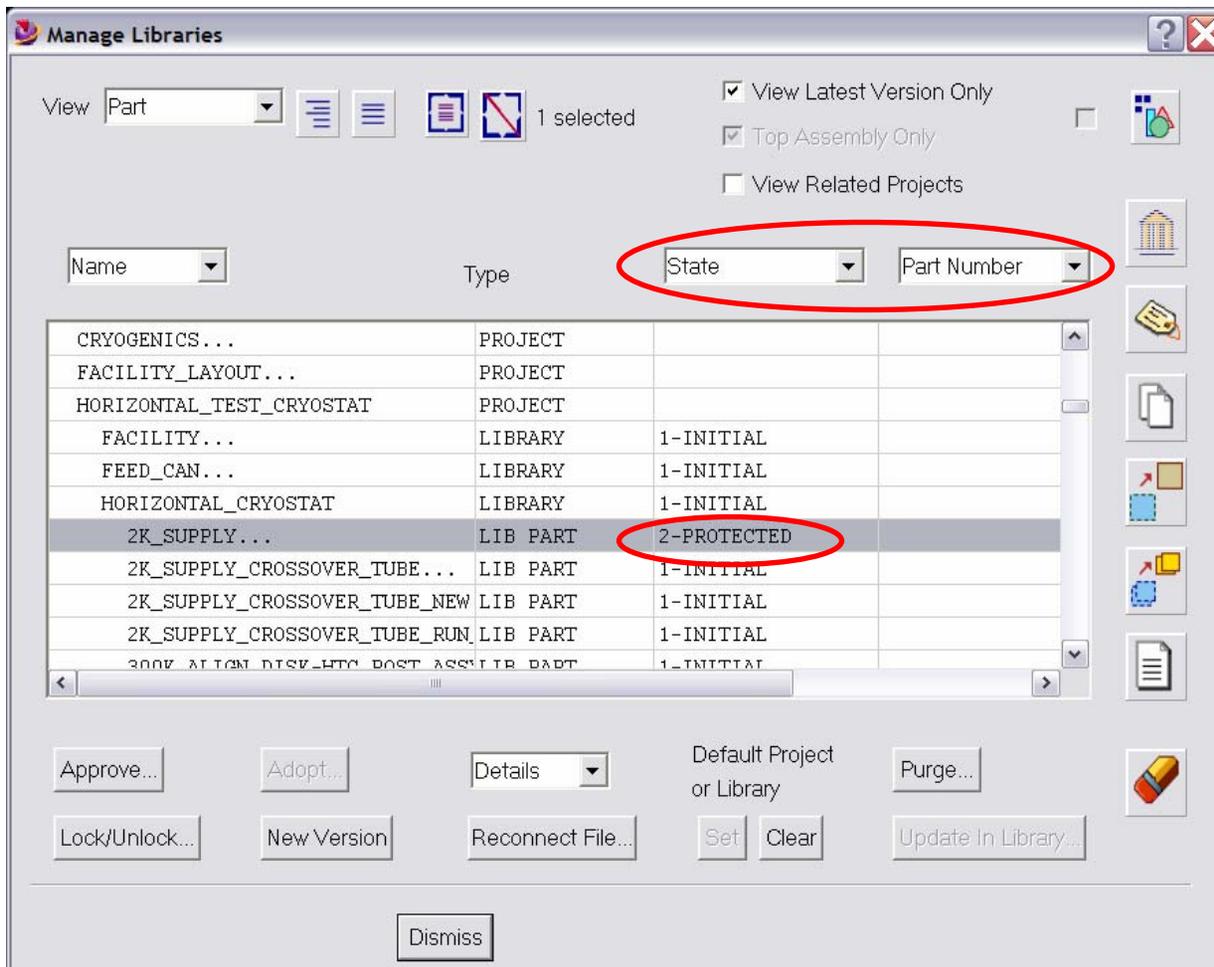
Additional Step for applying the PROTECTED State

When assigning an item version to the “PROTECTED” State, also add the reason why it is protected in the “Change History” Field. This field will serve as a future reminder why the item version was protected.



Viewing States in TDM

You can view the State of an item version in Manage Libraries by changing one of the two *Details* pulldowns to display the 'State'.



The screenshot shows the 'Manage Libraries' window with the following details:

- View: Part (dropdown)
- 1 selected
- View Latest Version Only (checked)
- Top Assembly Only (checked)
- View Related Projects (unchecked)
- Name (dropdown)
- Type (dropdown)
- State (dropdown, circled in red)
- Part Number (dropdown)

Name	Type	State	Part Number
CRYOGENICS...	PROJECT		
FACILITY_LAYOUT...	PROJECT		
HORIZONTAL_TEST_CRYOSTAT	PROJECT		
FACILITY...	LIBRARY	1-INITIAL	
FEED_CAN...	LIBRARY	1-INITIAL	
HORIZONTAL_CRYOSTAT	LIBRARY	1-INITIAL	
2K_SUPPLY...	LIB PART	2-PROTECTED	
2K_SUPPLY_CROSSOVER_TUBE...	LIB PART	1-INITIAL	
2K_SUPPLY_CROSSOVER_TUBE_NEW	LIB PART	1-INITIAL	
2K_SUPPLY_CROSSOVER_TUBE_RUN	LIB PART	1-INITIAL	
300K_ALIGN_DISK-HTC_POST_ASS...	LIB PART	1-INITIAL	

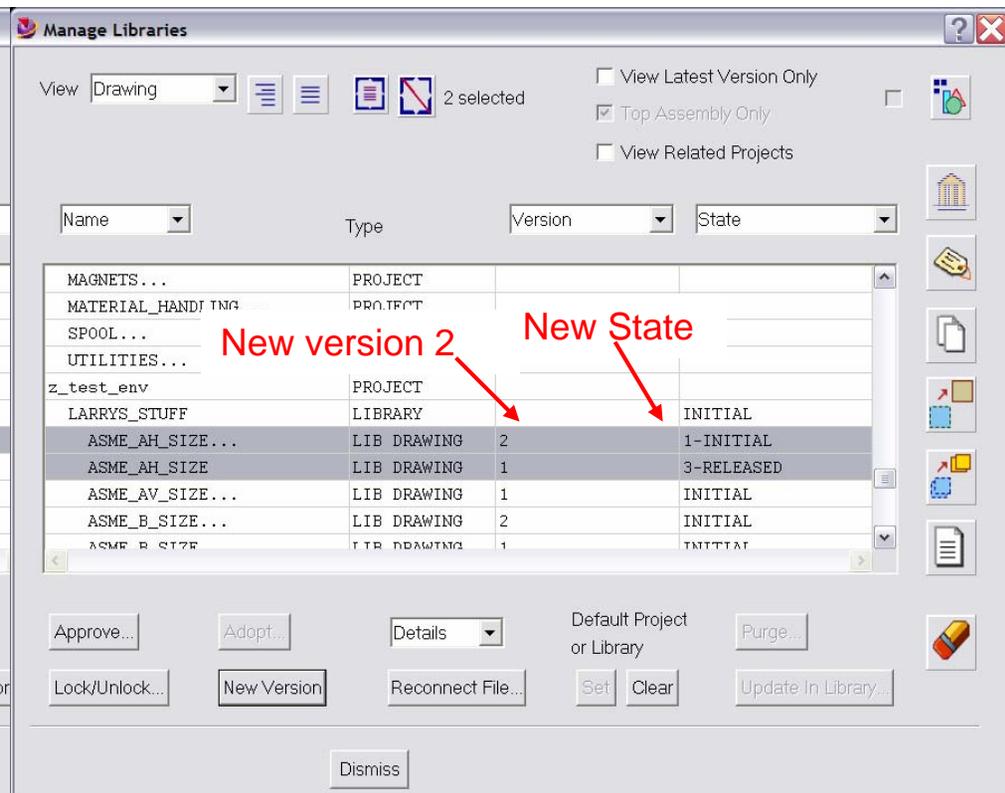
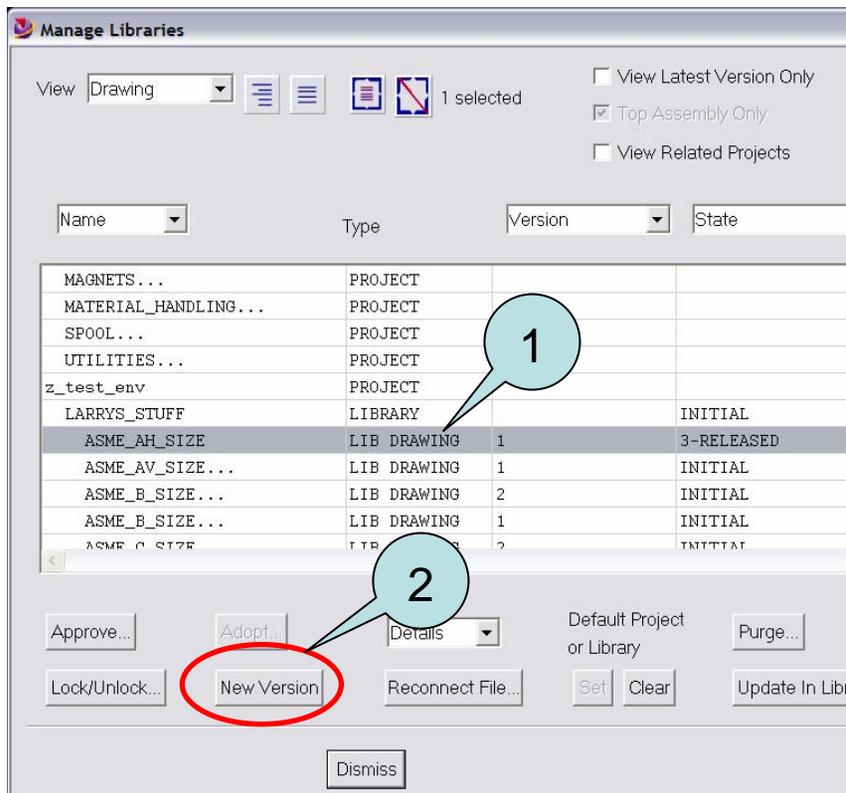
Buttons at the bottom: Approve..., Adopt..., Details (dropdown), Default Project or Library, Purge..., Lock/Unlock..., New Version, Reconnect File..., Set, Clear, Update In Library..., Dismiss

Checking Out a RELEASED item - Method 1

If the latest version of an item is in a RELEASED State and you want to revise it, create a new version of the item by

1. Highlighting the latest item version in the *Manage Libraries* Form.
2. Pick the “New Version” button. A new version will be created in the INITIAL State.

You can now check out the item!



Checking Out a RELEASED item - Method 2

1. Using the *Get From Library* Form, highlight the item version and select any of the options on the *Details* pulldown. The *Item Details* form will pop up.
2. Select "Create New Version" from the *Item Actions* pulldown. A new version in the INITIAL State will be created.

You can now check out the item!

New version 2

New State

Per	Stat	Name	Type	Version	State
		VERTICAL_TEST_CRYO	PROJECT		
		TEVATRON	PROJECT		
		BEAMLINE...	PROJECT		
		MAGNETS...	PROJECT		
		MATERIAL_HANDLING	PROJECT		
		SPOOL...	PROJECT		
		UTILITIES...	PROJECT		
		z_test_env	PROJECT		
		LARRYS_STUFF	LIBRARY	1	3-RELEASED
		ASME_AH_SIZE...	LIB DRAWING	1	3-RELEASED

Per	Stat	Name	Type	Version	State
		TEVATRON	PROJECT		
		BEAMLINE...	PROJECT		
		UTILITIES...	PROJECT		
		z_test_env	PROJECT		
		LARRYS_STUFF	LIBRARY	1	3-RELEASED
Ck		ASME_AH_SIZE...	LIB DRAWING	2	1-INITIAL
----		ASME_AH_SIZE...	LIB DRAWING	1	3-RELEASED

Using States with IDM Release Macro

Tony Parker is updating the IDM release macro to automate the assignment of drawings to the “RELEASED” State.

It should be ready later today, March 24th.

