

Versioning and Promoting

ItemTypes in the Product Engineering application are versionable. Versionable Items keep a history of changes by storing a new generation of the item each time a change is made.

Every Item in Aras Innovator can be promoted through a defined Life Cycle, which is a series of states that an Item traverses during its existence. Most ItemTypes in the Product Engineering application have their own unique default Life Cycle.

In this section, the term *Item* refers to a versionable Item with a Life Cycle.

Item Revisions and Versions

The sequence of Claim, Save, and Unclaim actions results in the creation of a new generation of the Item. When an Item reaches the Released state in its Life Cycle, no further changes can be made to the Released revision. Any further changes to the Item require it to be revised to create a new revision in the Preliminary state.

Version Exploration

The **Item versions** dialog displays all versions of an Item. To access this dialog, either:

- In the Item Search Grid, right-click the Item and click **Navigate** → **Versions**.
- Open the Item, on the Item toolbar, click **Navigate null** → **Versions**.

Item versions



	Part Number	Revision	Name	Type	State	Cost	Changes	generation
	Child A	A	Child A	Component	Preliminary	10.0000	☐	1
	Child A	A	Child A	Component	Preliminary	15.0000	☐	2
	Child A	A	Child A	Component	Preliminary	17.0000	☐	3
	Child A	A	Child A	Assembly	Preliminary	29.0000	☐	4
	Child A	A	Child A	Assembly	Preliminary	30.0000	☐	5
	Child A	A	Child A	Assembly	Preliminary	35.0000	☐	6
	Child A	A	Child A	Assembly	Preliminary	30.0000	☐	7



To examine details specific to an old version of an Item, double-click on the corresponding row in the **Item versions** dialog.

Important

Previous versions of Items are read-only and cannot be edited.

To view where an old version of an Item is used, right-click the old version in the **Item versions** dialog and click **Where Used**.

Item versions

	Part Number	Revisi...	Name	Type	State	Cost	Changes	generation
	Child A	A	Child A	Component	Preliminary	10.0000	☐	1
	Child A		Child A	Component	Preliminary	15.0000	☐	2
	Child A	A	Child A	Component	Preliminary	17.0000	☐	3

Version Deletion

To delete a version of an Item, a user must have **Delete** permission rights granted for the current Life Cycle state of the Item. For details on access rights, refer to section Permissions. This subsection assumes the user has **Delete** rights.

Important

Claimed Items cannot be deleted.

To delete an old version of an Item:

1. Go to the **Item versions** dialog for the Item.

2. Double-click on the version of the Item to be deleted to open it.

3. On the Item toolbar, click More null → Delete → Purge This Version. A confirmation dialog appears.

4. In the confirmation dialog, click **Purge** to delete the specific version of the Item.



Confirm Purge



Purge Part "BB-9090". Are you sure?

Purge

Cancel

It is also possible to delete the current version of an Item using the **Purge This Version** action, which can be accessed from the Item view or through the context menu in the Item Search Grid.

Important

If the current version of the Item is the only version existing in Aras Innovator, its purging deletes the Item completely. To avoid unwanted deletion, check Item versions before purging the current version.

Item History

The Product Engineering application can track changes made to an Item at both the item and property levels, including who made the change and when. By default, the following actions result in the creation of a history record: Add, Update, Promote, Reset or Set Default Lifecycle State, and Delete.

To view the history of an Item, access the **Item History** dialog:

1. Open the Item.
2. On the Item toolbar, click Navigate null → History.

The **Item History** dialog shows a grid of changes including time stamps, Identities, Actions, Comments, Item states, Revisions, and Generations.



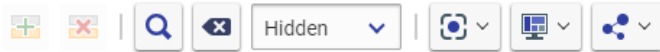
Item History



Item
[MP0138](#)

History

History



When [...]	Who [...]	Action	Comment [...]	Item State	Rev	Gen	Created_on_tick ▲
10/16/2017 10:08:00 AM	Mike Miller	Add		Preliminary	A	1	636831892838760700
11/7/2017 1:06:00 PM	Terry Adams	Update		Preliminary	A	1	636831896180851700
11/7/2017 1:37:00 PM	Mike Miller	Promote		Released	A	1	636831896190018000

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Manual Promotion and Revise

Items can be released and/or revised either via change processes or manually. The change management processes can automatically release the Items where Life Cycles are automatically controlled by Workflows if these Items are in the affected items list. If an item has never been released or revised via a change process, it is possible to release and revise it manually. This section describes the manual process. For details on the release and revise features with change management, refer to Section Change Management.

Manual release and revise features are available only when all the following criteria are true:

- No generations of the Item have been previously released or revised via a change process.
- The Item is not claimed.
- The user performing the action is the Assigned Creator of the Item.



Manual State Promotion

In the default Item Life Cycle, the Assigned Creator can manually promote an Item to its next life cycle state if the requirements for manual release and revision are met, and if there is a state available.

An Item can be promoted from either the Item view or its context menu in the Items Search Grid.

To promote an Item using its view:

- 1. Open the Item.
- 2. On the Item toolbar, click Promote null .
- 3. In the promotion dialog, select the desired state to promote the Item to by either:
 - 1. Double-clicking the state to which the item should be promoted.
 - 2. Clicking the state to promote to and then clicking **Promote to Selected State**.

To promote an Item using its context menu:

- 1. Go to the Items Search Grid.
- 2. Right-click the **Item** and then click **Promote**.

A Parent Part		Assembly	Preliminary
A	Body	Assembly	Preliminary
A	Extruder	Assembly	Preliminary

Open

Favorite

Claim

Promote



- 3. In the promotion dialog, select the desired state to promote the Item to by either:
 - 1. Double-clicking the state to which the item should be promoted.
 - 2. Clicking the state to promote to and then clicking **Promote to Selected State**.

Manual Release

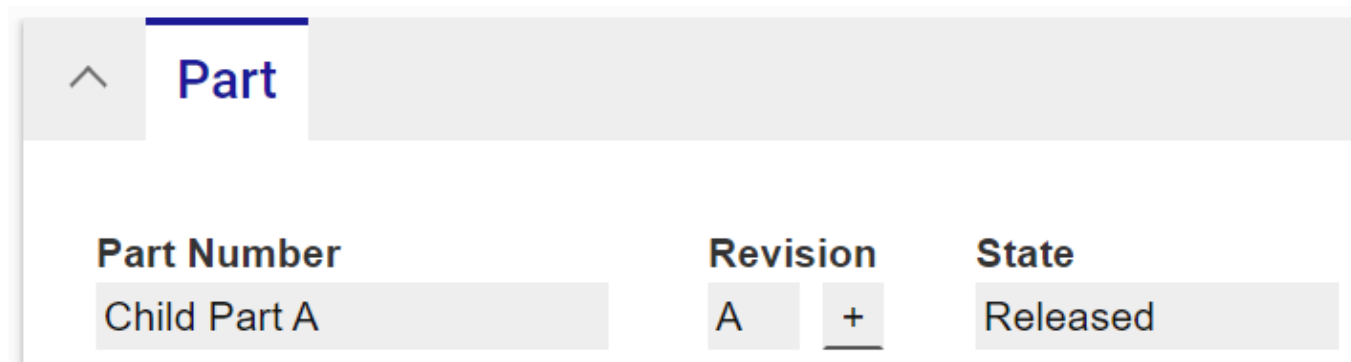


In addition to the manual promotion feature, you can release an Item in one action. In the default Item Life Cycle, the Assigned Creator can manually promote an Item to the Released state if the requirements for manual release are met by using either the Item view or its context menu in the Items Search Grid.

To release an Item using its view:

1. Open the Item.
2. On the Item toolbar, click More → Manual Release.

The promoted Item gets the **Released** value in the **State** field. The **plus** button also appears in the **Revision** field for manual revision.

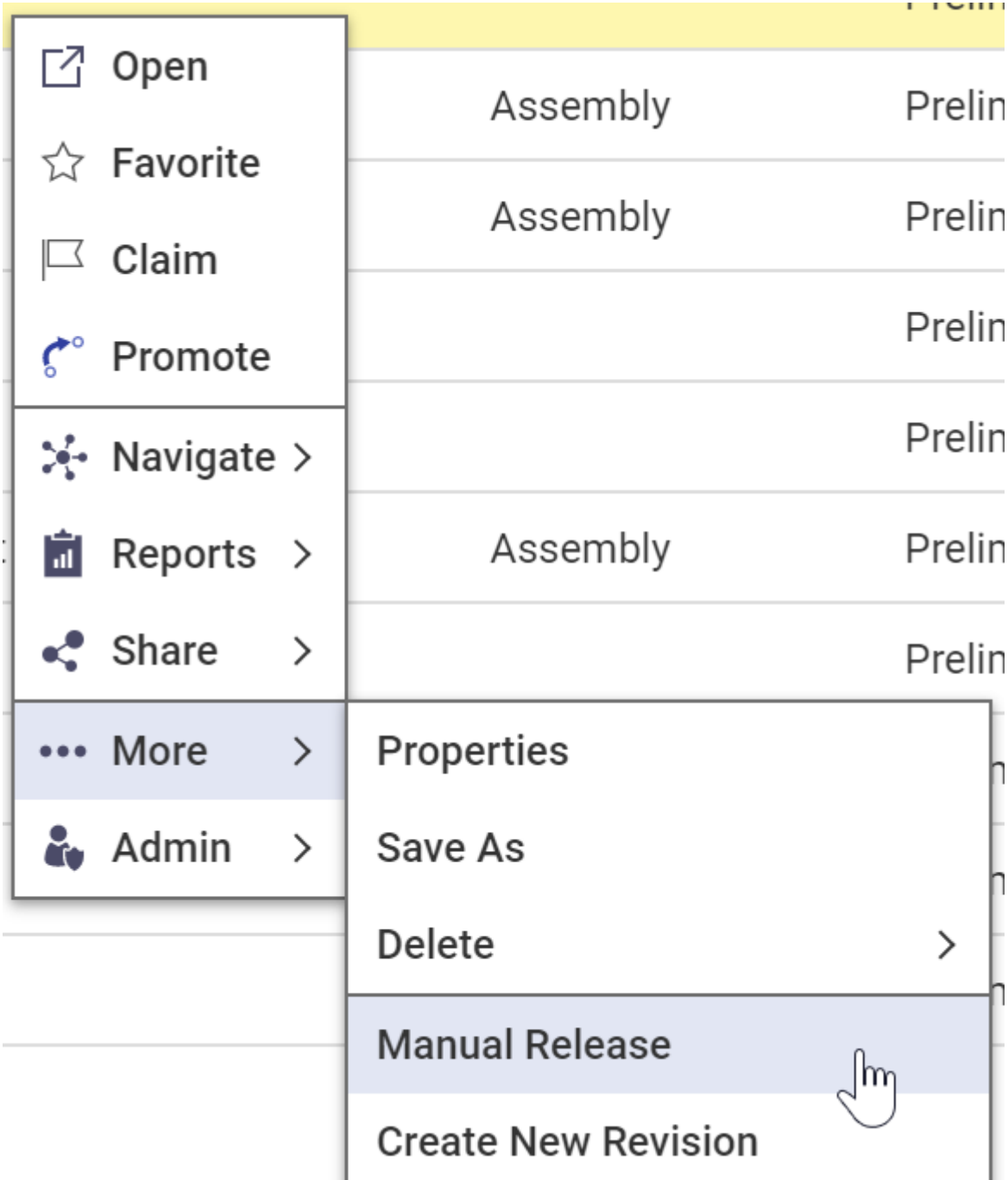


The screenshot shows a user interface for an item. At the top, there is a header bar with a back arrow icon and the word "Part" in blue. Below this, there are three main fields: "Part Number", "Revision", and "State". The "Part Number" field contains the text "Child Part A". The "Revision" field contains the text "A" and a plus sign icon. The "State" field contains the text "Released".

Part Number	Revision	State
Child Part A	A +	Released

To release an Item using its context menu:

1. Go to the Items Search Grid.
2. Right-click the **Item** and then click **More Manual Release**.



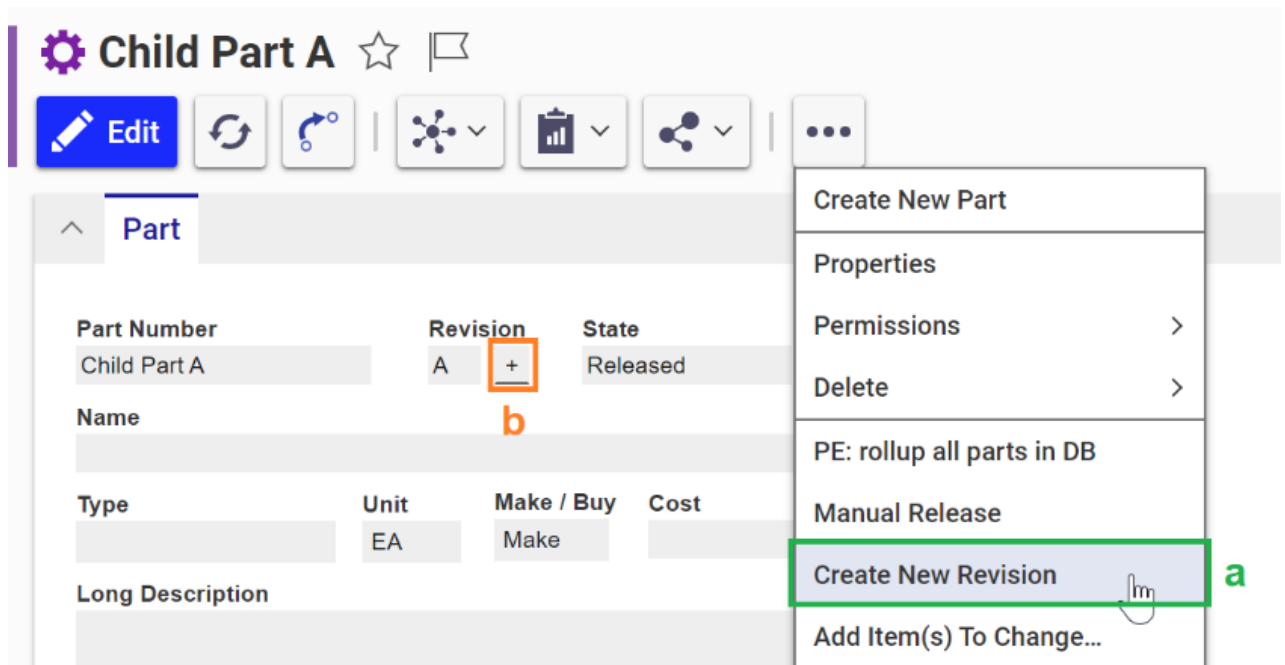
Manual Revise

The Assigned Creator can manually create a new major revision of an Item if the above-mentioned requirements for manual revision are met and if the Item is in the Released state either from the Item view or from the Item's context menu in the Items Search Grid.



To revise an Item manually using its view:

1. Open the Item.
2. Use one of the following options:
 1. On the Item toolbar, click More null → Create New Revision.
 2. Click the + button next to the **Revision** field and select **OK** in the confirmation prompt.



The revised Item gets the new major value in the **Revision** field and the Preliminary state. Under **Revision**, the **plus** button disappears.

Part Number	Revision	State
Child Part A	B	Preliminary

Use the following procedure to revise an Item using its context menu:

1. Go to the Items Search Grid.
2. Right-click the **Item**, and then click **More Create New Revision**.



 Open  Favorite  Claim  Promote  Navigate >  Reports >  Share >  More >  Admin >	Preliminary Assembly Preliminary Assembly Preliminary Preliminary Preliminary Assembly Preliminary Preliminary Properties Save As Delete > Manual Release Create New Revision Add Item(s) To Change... Change Discussion Definition Add Item to Bookmarks... PE: rollup all parts in DB
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Important



If you cannot see the latest Item generation in a Search Grid, click **Search** to reload the Grid. Another option is to use the Version exploration procedure.

