



# Engineering Changes Use Cases

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Status	Template		1

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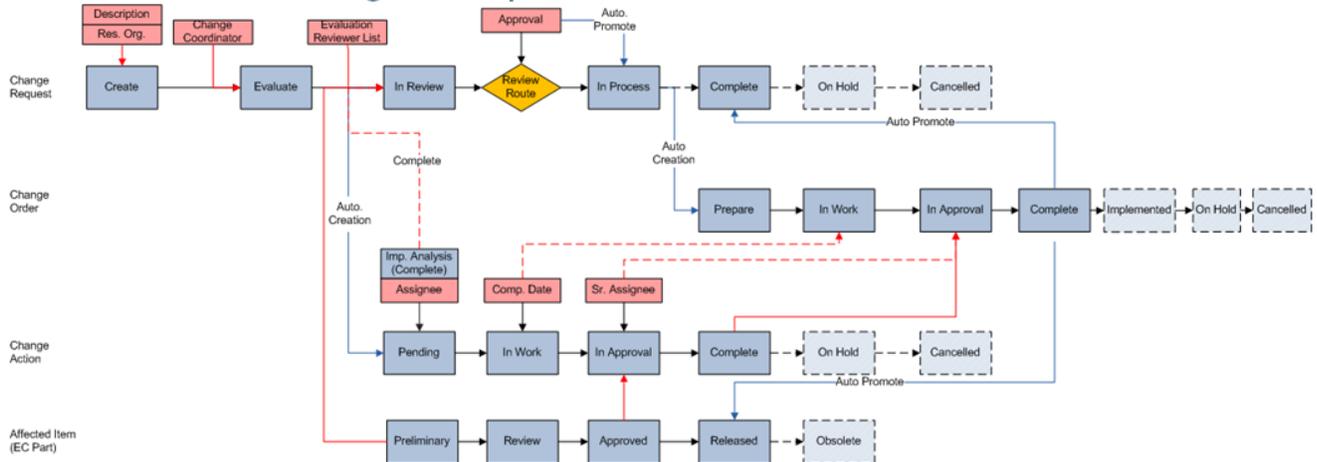
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# Enterprise Change Management overview

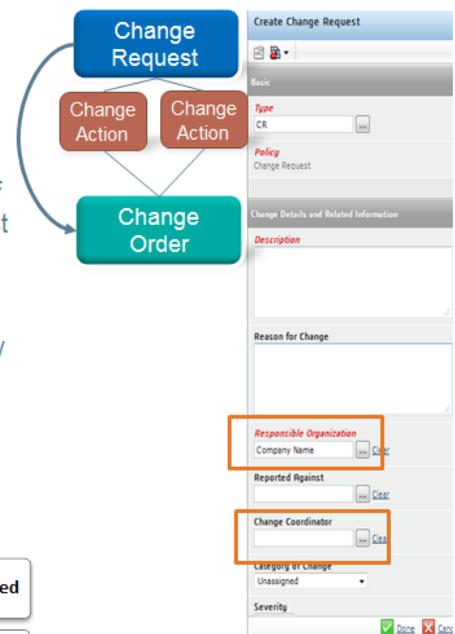
## From Change Request to Part revised



## CR - Change Request

### Key Items

- ▶ Change Coordinator is assigned to the Change Request, a member of the change board responsible to oversee the completion of the request
- ▶ Responsible Technical Organization (RTO) is used to identify the business unit or organization that has ownership of the change.
- ▶ Once the RTO is selected, a Change Coordinator can be automatically populated with the organization's 'lead role'.
- ▶ Much of the old existing ECR attributes are available in the new CR
- ▶ Close Loop Process, when Change Orders are complete, the Change Request is notified and can be promoted to complete
- ▶ The CR Lifecycle:

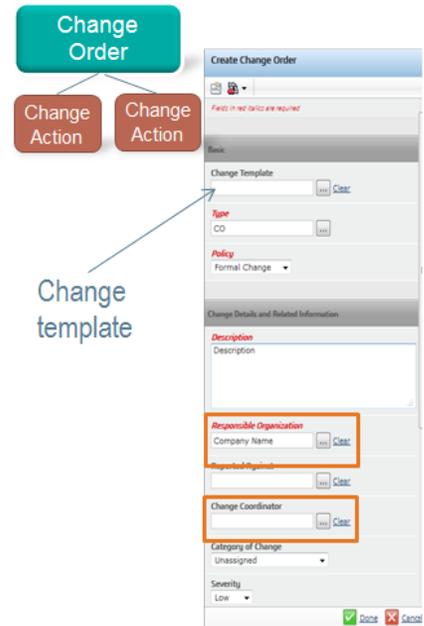


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# CO - Change Order

## Key Items

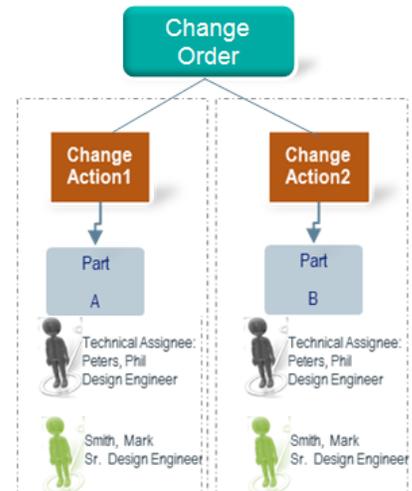
- ▶ Change Order tracks and manages the incorporation of changes done by the Change action.
- ▶ Change Order is not complete until all change actions are complete
- ▶ Change Templates are used to determine the desired Change Order lifecycle, type of Change Order and may add additional attributes
- ▶ Two change templates provided out-of-the-box:
  - ▷ Formal
  - ▷ Fast-Track
- ▶ Responsible Technical Organization (RTO) is required.
- ▶ Once the RTO is selected, the Change Coordinator is auto populated with the organization's 'lead role'.



# CA - Change Action

## Key Items

- ▶ Change Actions are automatically assigned to affected items based on the registration of the type
- ▶ Change Actions must be assigned to a Technical Assignee; the system can assign a person based registration of the type
- ▶ The change order's Responsible Technical Organization (RTO) is used to narrow down the list of people that can be assigned.
- ▶ Change Actions identify the:
  - ▷ "Requested Change", For Release or For Update
  - ▷ Sr. Technical Assignee responsible for review and approval of the change
  - ▷ Technical Approval List (optional)



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## EC01 Change Management dashboard

<b>Purpose</b>	The portal shows all Change processes created.	<b>Status</b>	Define
<b>Stakeholders</b>	All users		
<b>Beginning</b>			
<b>Interactions</b>	<p>Users can view the content of the following tabs:</p> <ul style="list-style-type: none"> <li>- Change Requests: can navigate Change Request information in order to see parts affected, document uploaded as reference and change details</li> <li>- Change Orders: navigate to Project and tasks related to change implementation</li> <li>- Change Actions: used by Engineers to create new part revision</li> <li>- Change Notices: navigate change notice created after change implementation, in order to update Start Effectivity Date</li> </ul>		
<b>End</b>			
<b>Constraints</b>	None		

Users can select the Home Change Management User command

### Change Requests dashboard

Name	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items	Owner	Originated
CR-0000162		Create	description test new CR	Engineering	Current Production	Joseph Zammit	Mar 9, 2016
CR-0000160		Create	test	Supplier	Current Production	Matthew Spiteri	Feb 24, 2016
CR-0000156		Create	Customer request	Engineering	Current Production	Matthew Spiteri	Feb 23, 2016
CR-0000151	Feb 3, 2016	In Process CO	knadknkjdnfs	Engineering	Current Production	Jessica Camilleri	Jan 22, 2016
CR-0000150	May 31, 2016	Create	Changing the material of...	Engineering	Current Production	Jessica Camilleri	Jan 22, 2016
CR-0000149		Create	Modification to housing t...	Engineering	Current Production	Robert Debono	Jan 22, 2016
CR-0000148	Jan 22, 2016	In Process CO	new revision	Engineering	Current Production	Robert Debono	Jan 15, 2016
CR-0000147		Create	Change for impor	Engineering	Current Production	Test Everything	Jan 14, 2016
CR-0000146	May 19, 2016	Evaluate	7th January test	Engineering	Current Production	Robert Debono	Jan 7, 2016
CR-0000145		Evaluate	Matthew Spiteri's Change!	Engineering	Current Production	Robert Debono	Dec 23, 2015
CR-0000144		Create	test 4 incomplete CR su...	Engineering	Current Production	Robert Debono	Dec 23, 2015
CR-0000143		Create	test4	Engineering	Current Production	Robert Debono	Dec 23, 2015
CR-0000142		Create	test	Engineering	Current Production	Test Everything	Dec 18, 2015
CR-0000139	Dec 31, 2015	In Process CO	test	Engineering	Current Production	Robert Debono	Dec 15, 2015
CR-0000137		Create	Test for 4500000	Engineering	Current Production	Matthew Spiteri	Dec 15, 2015
CR-0000132		Create	test	Engineering	Current Production	Test Everything	Dec 8, 2015
CR-0000131	Dec 31, 2015	Create	Testing CN ENG 4 Dec	Engineering	Current Production	Robert Debono	Dec 4, 2015
CR-0000117	Nov 30, 2015	In Process CO	Change Index component	Engineering	Launch	Robert Debono	Oct 28, 2015
CR-0000113		In Process CO	Component LED is obos...	Engineering	Current Production	Test Everything	Sep 16, 2015

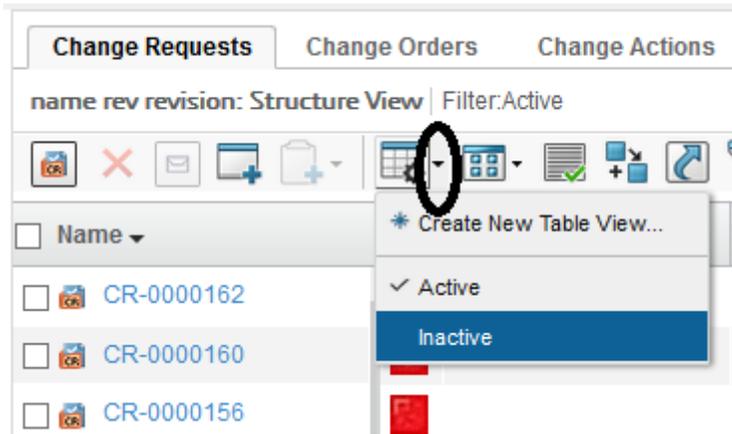
Table above shows all Change Requests defined in PLM (not only Change Requests belonging to user connected to PLM), in state Active.

Table shows some information related to Change Request, like owner, state, type of change; the icon

 is used to notify if Change Request has been created but Change Originator has not moved the package to Change Coordinator in a predefined period of time (usually 5 days).

In order to view Change Requests not active (completed or cancelled), user has to select the table filter and select the filter Inactive

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Change Requests									
Name	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items	Owner	Originated		
CR-0000161	Mar 1, 2016	Complete	The current LED supplier...	Engineering	Current Production	Jessica Camilleri	Feb 24, 2016		
CR-0000158	Sep 1, 2016	Complete	Micro Technologies in C...	Supplier	Current Production	Joseph Bugeja	Feb 23, 2016		
CR-0000157	May 1, 2016	Complete	A new camera shall be in...	Process	Current Production	Joseph Bugeja	Feb 23, 2016		
CR-0000155	Feb 29, 2016	Complete	This ECN is being issue...	Engineering	Current Production	Jessica Camilleri	Feb 23, 2016		
CR-0000154	Feb 29, 2016	Complete	Replace index	Engineering	Current Production	Joseph Bugeja	Feb 22, 2016		
CR-0000136	Dec 21, 2015	Complete	Replace Index	Engineering	Current Production	Robert Debono	Dec 14, 2015		
CR-0000135	Dec 21, 2015	Complete	test	Engineering	Current Production	Robert Debono	Dec 14, 2015		
CR-0000133	Dec 30, 2015	Complete	Test create new revision...	Engineering	Current Production	Robert Debono	Dec 9, 2015		
CR-0000128	Dec 30, 2016	Cancelled	Test Engineering Change	Engineering	Current Production	Test Everything	Dec 3, 2015		
CR-0000127		Cancelled	Change process for part...	Process	Current Production	Test Everything	Nov 23, 2015		
CR-0000126	Feb 1, 2016	Complete	Replace 16108 to 1647	Engineering	Current Production	Robert Debono	Nov 11, 2015		
CR-0000125	May 2, 2016	Complete	New Component	Engineering	Current Production	Test Everything	Nov 11, 2015		
CR-0000123	May 1, 2016	Complete	Change request for prod...	Engineering	Current Production	Robert Debono	Nov 10, 2015		
CR-0000122	Nov 20, 2015	Complete	Change PCB Assembly	Engineering	Current Production	Robert Debono	Nov 10, 2015		
CR-0000121	Nov 30, 2015	Complete	Replace component	Engineering	Launch	Robert Debono	Nov 9, 2015		
CR-0000120	Nov 30, 2015	Complete	Change electronic comp...	Engineering	Launch	Robert Debono	Nov 6, 2015		
CR-0000116		Complete	Change PCB sub-comp...	Engineering	Launch	Robert Debono	Oct 27, 2015		
CR-0000111		Complete	Change Button component	Engineering	Current Production	Test Everything	Sep 15, 2015		
CR-0000108		Complete	modify 000052	Engineering	Current Production	Test Everything	May 21, 2015		
CR-0000106	Jul 31, 2015	Complete	New PCB introduction	Engineering	Launch	Test Everything	May 16, 2015		
CR-0000104		Cancelled	new change request	Supplier	Current Production	Test Everything	Apr 30, 2015		

The Change Request lifecycle is composed by the following state:



Active states are: "Create", "Evaluate", "In Review" and "In Process"

Inactive states are: "Complete", "On Hold" and "Cancelled"

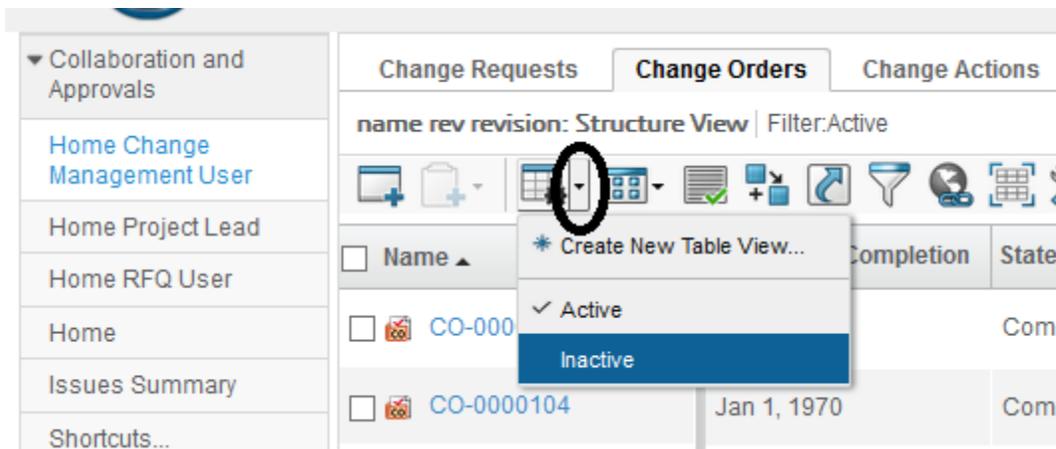
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Status	Template		7

# Change Orders dashboard

Name	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items	Owner	Originated	Affected Items
CO-0000103	Jan 1, 1970	Complete	Change PCB	Supplier	Current Production	Test Everything	Apr 29, 2015	MCO-0000008 MCO-0000007
CO-0000104	Jan 1, 1970	Complete	remove 0016	Supplier	Current Production	Test Everything	Apr 29, 2015	MCO-0000068 MCO-0000069
CO-0000109	Jan 1, 1970	In Work	Change component 0005	Engineering	Current Production	Test Everything	Apr 30, 2015	
CO-0000121	Jan 1, 1970	Complete	Substitute part 0000000...	Supplier	Current Production	Test Everything	May 21, 2015	
CO-0000123	Sep 30, 2015	Complete	modify 000052	Engineering	Current Production	Test Everything	May 21, 2015	
CO-0000126	Sep 30, 2015	Complete	Change Button component	Engineering	Current Production	Test Everything	Sep 15, 2015	MCO-0000025
CO-0000132	Nov 30, 2015	Prepare	Component LED is obos...	Engineering	Current Production	Test Everything	Sep 16, 2015	
CO-0000148	Nov 30, 2015	In Work	Change Index component	Engineering	Launch	Robert Debono	Oct 29, 2015	
CO-0000161	Nov 20, 2015	Complete	Change PCB Assembly	Engineering	Current Production	Robert Debono	Nov 10, 2015	
CO-0000166	Nov 12, 2015	Complete	Change request for prod...	Engineering	Current Production	Robert Debono	Nov 10, 2015	MCO-0000041
CO-0000185	May 2, 2016	Complete	New Component	Engineering	Current Production	Test Everything	Nov 11, 2015	MCO-0000048
CO-0000209	Feb 1, 2016	Complete	Replace 16108 to 1647	Engineering	Current Production	Robert Debono	Dec 9, 2015	
CO-0000213	Dec 31, 2015	Complete	Test create new revision...	Engineering	Current Production	Robert Debono	Dec 9, 2015	MCO-0000067
CO-0000228	Dec 21, 2015	Complete	test	Engineering	Current Production	Robert Debono	Dec 14, 2015	MCO-0000083 MCO-0000082
CO-0000230	Dec 21, 2015	Complete	Replace Index	Engineering	Current Production	Robert Debono	Dec 14, 2015	
CO-0000231	Dec 22, 2015	In Work	test	Engineering	Current Production	Robert Debono	Dec 15, 2015	
CO-0000281	Jan 22, 2016	In Work	new revision	Engineering	Current Production	Robert Debono	Jan 15, 2016	
CO-0018565	Feb 29, 2016	Complete	Replace index	Engineering	Current Production	Joseph Bugeja	Feb 22, 2016	MCO-0019574
CO-0018570	Feb 29, 2016	In Work	lkndklkldnfs	Engineering	Current Production	Jessica Camilleri	Feb 23, 2016	

Table above shows all Change Orders defined in PLM (not only Change Orders belonging to user connected to PLM), in state Active.

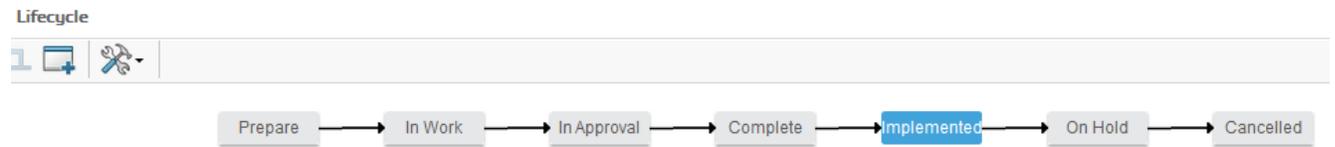
In order to view Change Orders not active (completed or cancelled), user has to select the table filter and select the filter Inactive



Name	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items
CO-0000112	Jan 1, 1970	Implemented	New PCB introduction	Engineering	Launch
CO-0000156	Nov 30, 2015	Implemented	Change electronic comp...	Engineering	Launch
CO-0000157	Nov 23, 2015	Implemented	Replace component	Engineering	Launch
CO-0000210		Implemented	Change PCB sub-comp...	Engineering	Launch

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The Change Order lifecycle is composed by the following state:



Active states are: “Prepare”, “In Work” and “In Approval”

Inactive states are: “Complete”, “Implemented”, “On Hold” and “Cancelled”

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## Change Actions dashboard

Change Requests   Change Orders <b>Change Actions</b>									
name rev revision: Structure View   Filter: Pending									
Name	Type	State	Responsible Org	Assignee	Affected Items	Owning CO	Comple		
<input type="checkbox"/> CA-0000242	Change ...	Pending	METHODE ELE...	Matthew S...	0000000560	CR-000013 CO-000022			

Table above shows Change Actions that belongs to user connected to PLM, that are ready to be revised (Change Request is approved but the revision is not yet implemented). In this case, the Change Action state is Pending.

In order to view Change Actions that belongs to user connected to PLM but not in state Pending (related to EBOM approval or related to Change Requests approved with new revision already created), user has to select the table filter and select the other filters.

Change Requests   Change Orders <b>Change Actions</b>									
name rev revision: Structure View   Filter: Pending									
Name	Type	State	Responsible Org	Assignee	Affected Items	Owning CO	Comple		
<input type="checkbox"/>		<ul style="list-style-type: none"> <li>* Create New Table View...</li> <li>✓ Pending</li> <li>Active</li> <li>Approval</li> <li>Closed</li> </ul>							

- Filter Pending: shows Change Action related to Change Requests approved with part number not yet revised
- Filter Active: shows Change Action related to Change Requests approved with part number already revised
- Filter Approval: shows Change Action related to EBOM approval process not completed
- Filter Closed: shows Change Action related to EBOM approval process completed

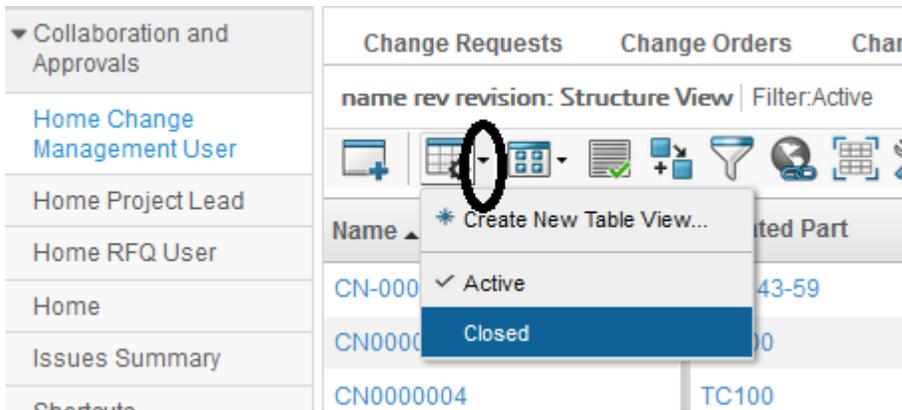
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Status	Template		10

# Change Notices dashboard

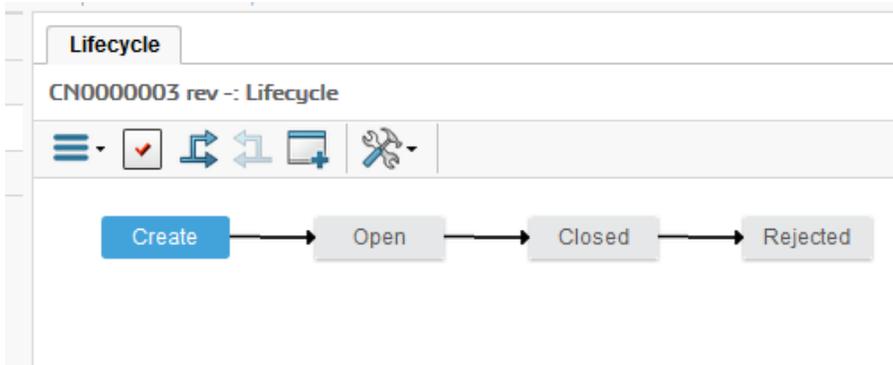
Name	Related Part	Related MCO	Related CA	Related CR	Start Date	Current	Notes
CN-00048	750143-59	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...
CN0000003	TC100	MCO-0000227	CA-0000637		Mar 4, 2016	Create	SWITCH :TC101-00 With:...
CN0000004	TC100	MCO-0000228	CA-0000638		Mar 5, 2016	Create	SWITCH :TC102-00 With:...
CN0000005	0000000674	MCO-0000146			Feb 21, 2016	Create	ADD :000000686-90 ADD:...
CN0000006	000007070	MCO-0016452			Dec 31, 2049	Open	ADD :090195
CN0000007	0000000095	MCO-0000057	CA-0000209		Feb 20, 2016	Create	ADD :0000000100-00 ADI...
CN0000010	0000000631	MCO-0019574	CA-0018084	CR-0000154	Feb 28, 2016	Create	SWITCH :0000000632-00
CN0000011	0000000637	MCO-0019574	CA-0018084	CR-0000154	Mar 27, 2016	Create	SWITCH :0000000632-00
CN0000012	750142-59	MCO-0013969	CA-0000824		Feb 27, 2016	Create	ADD :54674-00 ADD :162...
CN0000013	750142-46	MCO-0013916	CA-0000456		Feb 26, 2016	Create	ADD :16266-04 ADD :162...
CN0000014	750142-46	MCO-0016666	CA-0015064		Feb 27, 2016	Create	SWITCH :16266-04 With:...
CN0000015	750143	MCO-0014028	CA-0001026		Feb 25, 2016	Create	ADD :16273-04 ADD :571...
CN0000016	750143-44	MCO-0014086	CA-0001758		Feb 27, 2016	Create	ADD :16273-04 ADD :546...
CN0000017	750143-45	MCO-0014142	CA-0003510		Feb 27, 2016	Create	ADD :16273-04 ADD :569...
CN0000018	750143-44	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...
CN0000019	750149	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...
CN0000020	750149-58	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...
CN0000021	750147	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...
CN0000022	750148	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...
CN0000023	750146-49	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...
CN0000024	750147-50	MCO-0021297	CA-0018089	CR-0000155	Feb 29, 2016	Create	SWITCH :56936-07 With:...

Table above shows all Change Notices defined in PLM, in state Active.

In order to view Change Notices not active (closed or rejected in CMS), user has to select the table filter and select the filter Closed



The Change Notice lifecycle is composed by the following state:



Active states are: "Create" and "Open"

Closed states are: "Closed" and "Rejected"

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## EC02 Change Management implementation

<b>Purpose</b>	EBOM and MBOM are completed and implemented; a request for a change is raised for different reason: <ul style="list-style-type: none"> <li>- from Customer, with new specification</li> <li>- from Supplier, with a proposal to improve production</li> <li>- internally</li> </ul>	<b>Status</b>	Define
<b>Stakeholders</b>	Change Coordinators, Design Engineers and Management		
<b>Beginning</b>	A Change Request is raised		
<b>Interactions</b>	<p>Users can create a Change Request, providing information to describe requested change. Change Coordinators can define a team that has to provide information related to costs and impact analysis.</p> <p>When all team members complete their tasks, Change Coordinator can move the Change Request to Management for approval.</p> <p>Management has to approve Change Request. Management can decide to hold request for a max period of 4 weeks; after this period, if request is not presented, Change Request can be removed by Change Coordinator.</p> <p>If Change Request is approved, Change Order is planned.</p> <p>Change Order can implement also a project, depending on process type: Supplier driven, Customer driven or Methode driven.</p> <p>Users involved in Change Order implementation will be notified in order to complete tasks</p>		
<b>End</b>	Change Order is implemented or rejected		
<b>Constraints</b>	None		

Users can create a Change Request with or without a part number connected. Affected part numbers can be added later.

### Change Request created from a Part Number

Step 1 Search for a Part Number to change; select Change Management command

The screenshot shows a software interface for managing parts. At the top, there is a search bar with the part number '0000000018' and a 'Part (1)' icon. Below the search bar, there are buttons for 'State' (Approved, Released, Obsolete), 'Owner' (Corporate), and 'Modified' (4/21/2015 5:23:08 PM). The main area displays a list of options for the part number, including 'Change Order', 'Change Request' (circled in red), 'Change Legacy', and 'MECOs'. The 'Change Request' option is highlighted with a blue star icon. Below this, there is a table titled 'Change Action Information and Assignment' with columns for 'Name', 'Change Action', 'Status', 'State', and 'Assignee'. The 'Change Management' option in the left sidebar is also circled in red.

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## Step 2 Select icon to create a new request



User has to compile the field Change Notice Type (to identify the type of change to implement), Status Affected Items (to identify if change is related to a product or variant already in production or in progress), a description and a Reason for Change; other mandatory fields are compiled with default depending on user connected (for example, Responsible Organization is equals to user's Company). Optionally, a user can complete other fields (fields can be completed also in a following session)

### Create Change Request

**Change Details and Related Information**

*Change Notice Type*

*Status Affected Items*

Category of Change

Severity

*Description*

*Reason for Change*

*Responsible Organization*

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If part has already a Change Request active, a dedicate icon is shown in the part header; also, the table will shows existing Change Requests in state Pending

000000022 Indexing  
 Part (1) 1

State : Released  
 Owner : Corporate  
 Modified : Mar 17, 2016 6:20:46 PM

Change Order **Change Request** Change Legacy

Change Action Information and Assignment

Name	Change Action	Status	State
CR-0000100	CA-0000125	◆	Complete
CR-0000163	CA-0024535	◆	Pending

## Change Request created standalone

Step 1 From Home Change Management User view, select Change Request tab

Collaboration and Approvals  
**Home Change Management User**  
 Home Engineering User  
 Home Project User  
 Home  
 Issues Summary  
 Shortcuts...  
 Collections  
 Tasks  
 Subscriptions  
 Meetings  
 My Calendar  
 Decisions

Change Requests Change Orders Projects

name rev revision: Structure View | Filter:Active

Name	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items
CR-0000103	Oct 30, 2015	Evaluate	revise 14783	Supplier	Current Production
CR-0000105	Jul 1, 2015	In Process...	Change component 0005	Engineering	Current Production
CR-0000102		In Process...	remove 0016	Supplier	Current Production
CR-0000107		Create	Component 00000011 mo...	Supplier	Launch
CR-0000109		Create	Change components with ...	Engineering	Current Production
CR-0000110		Create	Cost reduction for new ele...	Engineering	Current Production
CR-0000113		In Process...	Component LED is obsolete	Engineering	Current Production
CR-0000116		In Process...	Change PCB sub-compon...	Engineering	Launch
CR-0000117		Create	Change Index component	Engineering	Launch

9 objects

Step 2 Select icon to create a new request



The creation process is the same of change request created from a Part Number. The only difference is the change request has no affected items connected.

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## Change Request details

Step 1 User has to compile Change Request information before promote to state Evaluate.

The information used to describe and complete Change Request is shown in two different forms. The first form, called Properties, contains the information common to different process types:

- Change Coordinator (mandatory attribute before move to next state)
- Description of change and reason for change (mandatory)
- Estimated and actual start and end dates

In order to enter information, user has to select tab Properties

Information and Status			
Messages		Status	▼
Basic			
Change Coordinator		Owner	Matthew Spiteri
Change Details and Related Information			
Change Notice Type	Engineering	Status Affected Items	Current Production
Category of Change	Product Improvement	Severity	Low
Description	Test for 4500000	Reason for Change	Test CR
Program/Platform #		Notes	
Duration Alert Days	5	Dependent Parts	FALSE
Connected RFQ			
Reviewers and Approvers			
Evaluation Reviewers List		Distribution List	
Extended Attributes			
Originated	Dec 15, 2015	Modified	Mar 17, 2016
Estimated Start		Estimated Completion	
Actual Start		Actual Completion	
Responsible Organization	METHODE ELECTRONICS		

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Select icon Edit

Change Originator can complete information; when completed, select Done

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## Step 2 User can compile other information related to Change Notice Type

The second form contains the information related to change notice type.

### Change Request related to Change Notice Type “Engineering”

Modified: Mar 17, 2016 5:44:42 PM

Properties **Engineering Details...** Affected Items Change Actions Reference Documen... Review Routes History Images

Supplier Details

Owner	Matthew Spiteri	Originated	Dec 15, 2015
Customer Name			
Risk Assessment	FALSE	Customer PPAP	FALSE
Description	Test for 4500000		

Affected Items

Name	Type	Rev	Description
No Objects Found			

Functional Safety	FALSE	Implementation Confidence Level	Review QUALITY HISTORY	FALSE
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Costs Implementation

Quotation Currency	Unassigned		
	Lead Time		Total Costs
Comp. Tool Material	Unassigned		0.0
Comp. Tool Labour	Unassigned		0.0
Comp. Tool Subcontract	Unassigned		0.0
Assy Equip. Material	Unassigned		0.0
Assy Equip. Labour	Unassigned		0.0
Assy Equip. Subcontract	Unassigned		0.0
Lab Jig Material	Unassigned		0.0
Lab Jig Labour	Unassigned		0.0
Lab Jig Subcontract	Unassigned		0.0
Gauges Material	Unassigned		0.0
Gauges Labour	Unassigned		0.0
Gauges Subcontract	Unassigned		0.0
Validation Internal	Unassigned		0.0
Validation External	Unassigned		0.0
Piece Price Variance	Unassigned		0.0
Obsolescence Cost	Unassigned		0.0
Design Hours Cost	Unassigned		0.0
Other Costs	Unassigned		0.0

Version	8	Date:	30-April-2016
Status	Template		17

## Change Request related to Change Notice Type "Supplier"

Supplier Details			
Owner	Matthew Spiteri	Originated	Feb 24, 2016
Supplier Name		Vendor Code	
Vendor Contact		Vendor Telephone Number	
Risk Assessment	TRUE	Customer PPAP	TRUE
Description	test		

Affected Items			
Name	Type	Rev	Description
000000002	EC Part	01	EPB RH
000000006	EC Part	01	Tip

Change Details			
Design Change - Up Index required		Process Change - Up Index NOT required	
Change Requested By			

Reason of Change			
Quality concern/improvement		Capacity improvement/change	
Change in process		Material change	
Other			

Content of Change			
Logistic (Packaging, Handling, Other)		Relocation of machinery	
Change in manufacturing location		Specification	
Other			

Functional Safety	FALSE	Implementation Confidence Level		Review QUALITY HISTORY	FALSE
-------------------	-------	---------------------------------	--	------------------------	-------

Affects of the Change			
Piece Cost Affected		Piece Cost Affected (Value)	
Potential Cost Saving		Potential Cost Saving (Value)	

## Change Request related to Change Notice Type "Process"

Process Change Details			
Owner	Matthew Spiteri	Originated	Dec 15, 2015
Process Affected		Customer PPAP	FALSE
Risk Assessment	FALSE		
Description	Test for process		

Affected Items			
Name	Type	Rev	Description
000000023	EC Part	01	Plunger

Reason of Change			
Quality concern/improvement		Capacity improvement/change	
Difficult operation		Relocation of machine, tool	
Reuse of inactive machine, tool		Trouble of machine, tool, gauge	

Content of Change			
Material		Equipment (Machine, Tool, Other)	
Production Method / Condition		Logistic (Packaging, Handling, Other)	
Relocation of machinery		Other	

Functional Safety	FALSE	Implementation Confidence Level		Review QUALITY HISTORY	FALSE
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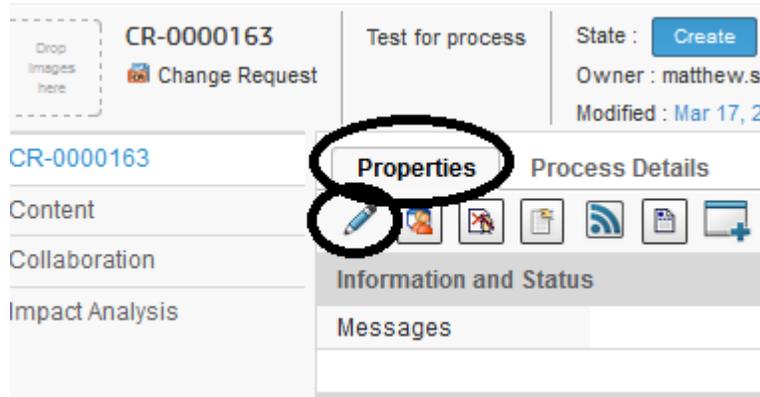
Affects of the Change			
Piece Cost Affected		Piece Cost Affected (Value)	
Potential Cost Saving		Potential Cost Saving (Value)	
Details of changes			

Version	8	Date:	30-April-2016
Status	Template		18

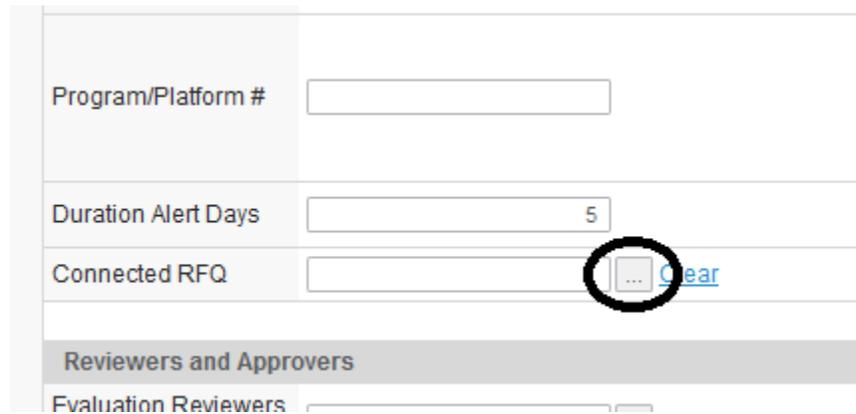
To enter the information in form Properties or in specific form, select icon Edit 

### Step 3 Change Request created after a Request for Quotation

The user can select which RFQ is related to Change Request created; select tab Properties, select icon Edit

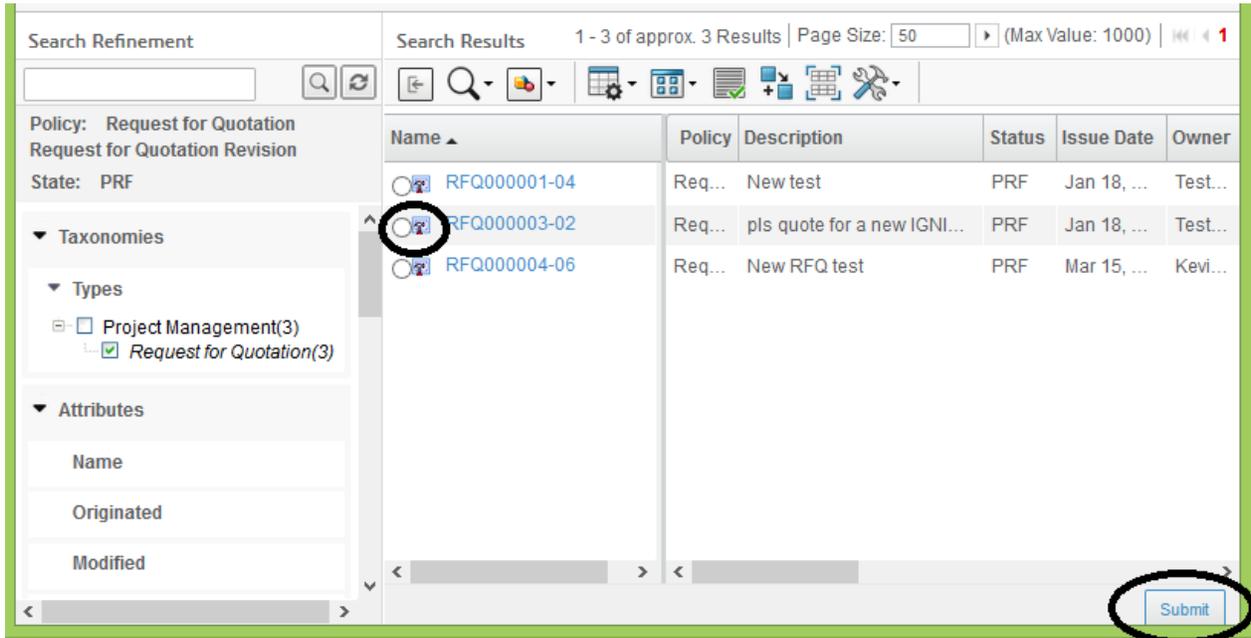


Select icon to query RFQ in state PRF

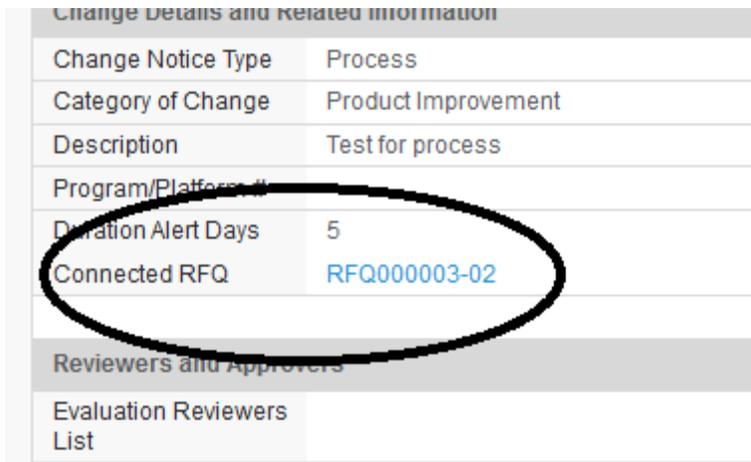


User has to select RFQ related to Change Request and select Submit; the table shows only RFQ approved

Version	8	Date:	30-April-2016
Status	Template		19



The form Properties contains the hyperlink to RFQ selected



#### Step 4 Change Coordinator selection

Before moving Change Request to state Evaluate, the Change Originator has to select the Change Coordinator that will manage the Change; the user name has to be selected from a list composed by people from Change Coordinators and Launch Management teams. It's the responsibility of Change Originator to selects the right person; depending on the type of change "Current Production" or "Launch", the Change Originator needs to select the Change Coordinator from that team.

Version	8	Date:	30-April-2016
Status	Template		20

CR-0000163

Content

Collaboration

Impact Analysis

**Properties** | Process Details | Affected Items | Change Ac

Fields in red italics are required

**Information and Status**

Messages

**Basic**

Change Coordinator

**Change Details and Related Information**

Search Refinement

Search Results 1 - 10 of approx. 10 Results | Page Size: 50 (Max Value: 1000)

Role: Change Coordinator Leader  
State: Active

**Taxonomies**

**Types**

Person(10)

**Attributes**

Name

Originated

Modified

Description

Change Assignment

Name	Role	Full Name	Company
<input type="radio"/> davidd	Basic User, Prod...	Debono, David	
<input type="radio"/> Edward.Gingell	Basic User, Prod...	Gingell, Edward	
<input type="radio"/> elias.moussa	Basic User, Prod...	Moussa, Elias	
<input type="radio"/> jessicac	Basic User, Prod...	Camilleri, Jes...	
<input type="radio"/> joe.budgeja	Basic User, Prod...	Bugeja, Joseph	
<input type="radio"/> Johann	Basic User, Prod...	Barbara, Johann	
<input type="radio"/> laura.bonello	Basic User, Prod...	Bonello, Laura	
<input type="radio"/> robert.debono	Basic User, Cha...	Debono, Robert	
<input type="radio"/> robertot	Basic User, Prod...	Tiscio, Roberto	
<input type="radio"/> stanley.muller	Basic User, Prod...	Muller, Stanley	

Submit

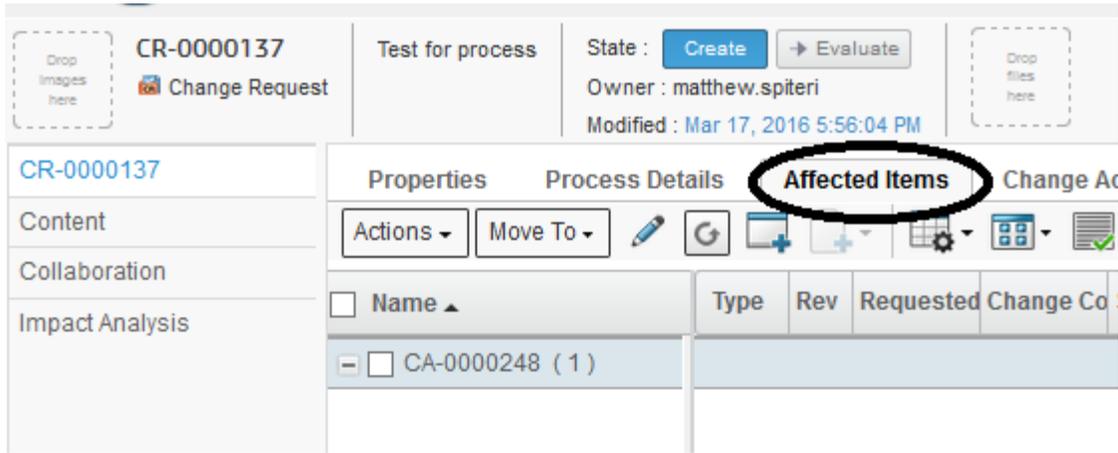
## Part Affected definition

### Step 1 User has to define Part Number affected by Change Request

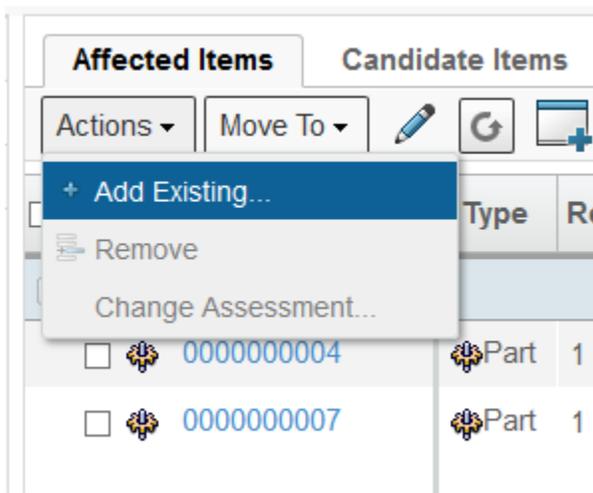
In order to define parts affected, that has to be revised, select Affected Items command.

If Change Request has been created started from a Part Number, the part is already connected as Affected Item

Version	8	Date:	30-April-2016
Status	Template		21



From the Actions menu, select command Add Existing



User has to search for parts to be revised; from result table user can filter the query using attributes criteria. A dedicated icon shows if a part is already affected by an active Change Request.

Version	8	Date:	30-April-2016
Status	Template		22

Search Refinement Search Results 1 - 50 of approx. 16376 Results | Page Size: 50 (Max Value: 1000)

Policy: EC Part Sketch Part Standard Part Part Specification CAD Drawing Design Policy Design TEAM Definition CAD Model Drawing Print Controlled Documents

Taxonomies

Types

- Part(16376)
  - Vendor Part Number(7...)
  - Hardware Part(1121)

Libraries

- Technical Classification(...)

Attributes

- Name
- Originated
- Modified
- Description
- Comment

Display Name	Revision	Type	Policy	Description	State	Modified
00-9496-517.849	00	Ven...	EC ...		Rel...	Mar 9,...
00-9496-517.850	00	Ven...	EC ...		Rel...	Mar 9,...
0000000001	A	Part	Dev...	EPB LH	Co...	Jan 1...
0000000002	02	Part	EC ...	EPB RH	Rel...	Jan 1...
0000000002	A	Part	Dev...	EPB RH	Co...	Jan 1...
0000000002	01	Part	EC ...	EPB RH	Rel...	Mar 1...
0000000003	01	Part	EC ...	Roof Switch	Appr...	Jan 1...
0000000003	A	Part	Dev...	Roof Switch	Co...	Jan 1...
0000000003	02	Part	EC ...	Roof Switch	Rel...	Jan 2...
0000000003	00	Part	EC ...	Roof Switch	Appr...	Jan 1...
0000000004	A	Part	Dev...	Housing	Co...	Jan 1...
0000000004	00	Part	EC ...	Housing	Rel...	Jan 1...
0000000005	A	Part	Dev...	Toggle	Co...	Jan 1...
0000000005	00	Part	EC ...	Toggle	Rel...	Jan 1...
0000000006	A	Part	Dev...	Tip	Co...	Jan 1...

Submit

Step 2 User can update Change Request adding parts related to Affected Items already defined  
 User has to select Affected Item tab, select one item, select Change Assessment

Properties Engineering D

Actions Move To

- Add Existing...
- Remove
- Change Assessment...

A window pops up with parts contained in EBOM and parent parts.

Version	8	Date:	30-April-2016
Status	Template		23

## Change Assessment

Name	Revisor	Type
EBOM (17)		
<input type="checkbox"/> 26010001	1	P:
<input type="checkbox"/> 52819	02A	P:
<input type="checkbox"/> 52820	01A	P:
<input type="checkbox"/> 52821	01A	P:
<input type="checkbox"/> 52822	04A	P:
<input type="checkbox"/> 52826	09A	P:
C40768	01A	P:
Where Used (2)		
<input type="checkbox"/> 1.453052		P:
<input type="checkbox"/> 2.453052		P:

19 objects

Cancel

User can select parts to be added as Affected Items and select the command Add as Affected Item.



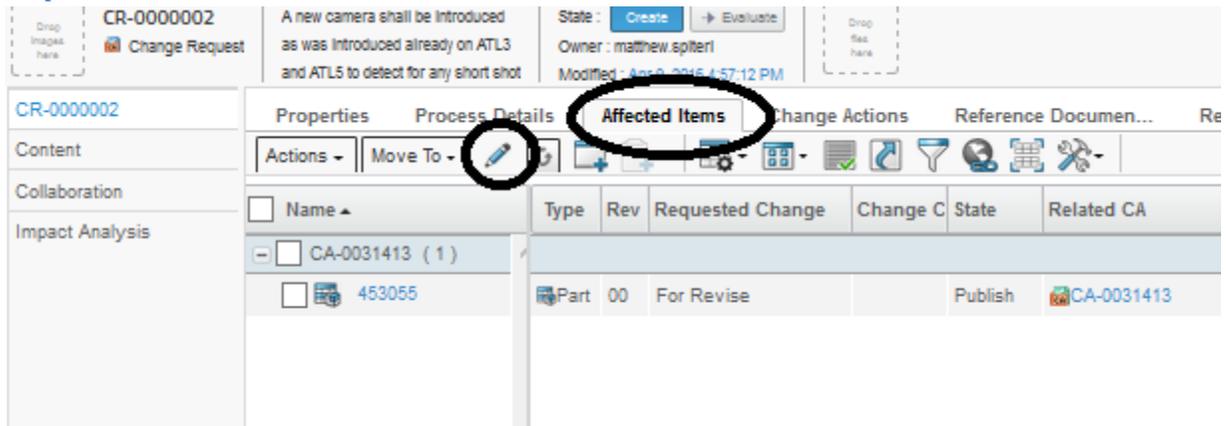
Version	8	Date:	30-April-2016
Status	Template		24

## Part Affected revision control

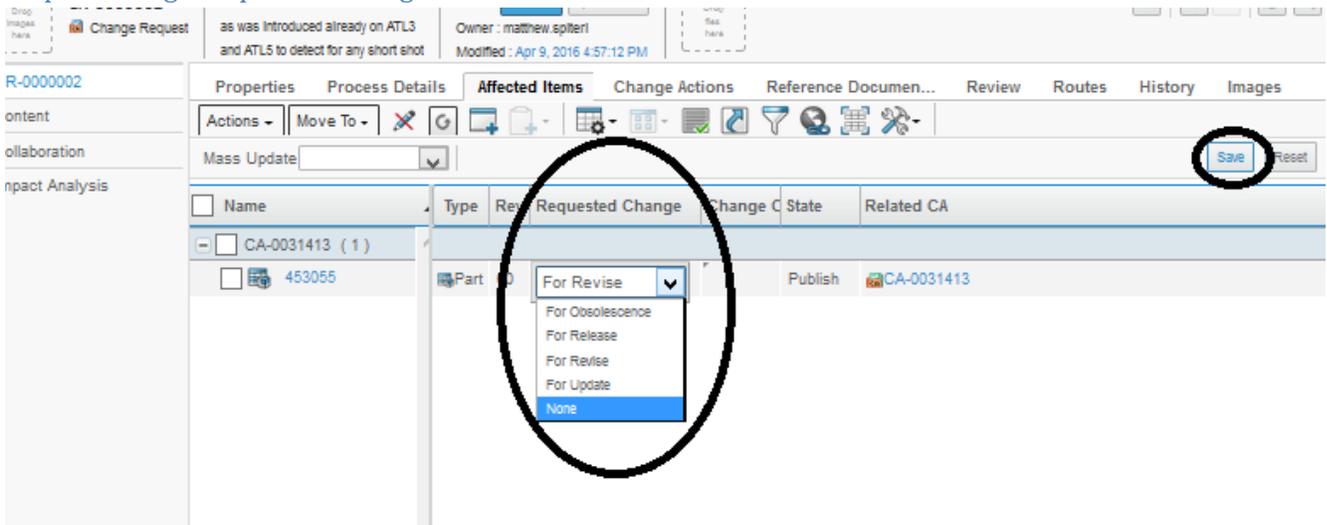
Change Originator (or Change Coordinator in state Evaluate) has to define is affected parts have to be indexed or the change process has to maintain original revision. By default, system setups all affected parts to be revised after Change Request approval.

In order to define that parts affected have not to be revised, the user has to specify the setting in Affected Items table.

### Step 1 Select command Affected Items and select icon Edit



### Step 2 Change Requested Change value to None and select command Save



Version	8	Date:	30-April-2016
Status	Template		25

## Complete Change definition with documents

Step 1 User can complete Change Request, by uploading documents to support the request (like Risk Assessment, customer specification or PRF for Customer driven changes)

User has to select content command and create or add existing documents

Name	Title	Rev	Ver	Type	Actions	Description	State
0/1 DOC-0000013	X152-EPB-ROOF-SPEC-v1.4 17-05-12.doc	1	1	Document	[Icons]		In Work

In order to upload a new document, user can use the drag & drop function in the Change Request header.

User has to select a file from Explorer and drag the file on the selected region

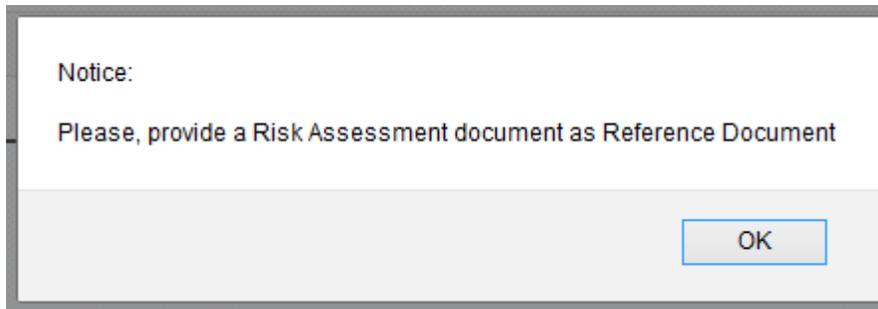
Version	8	Date:	30-April-2016
Status	Template		26

## Step 2 Risk Assessment document

A check is performed on the Change Request if the Risk assessment field in the Details tab is updated to TRUE. A Risk assessment document is mandatory as a document attachment for the Change Request to be promoted to state Review.

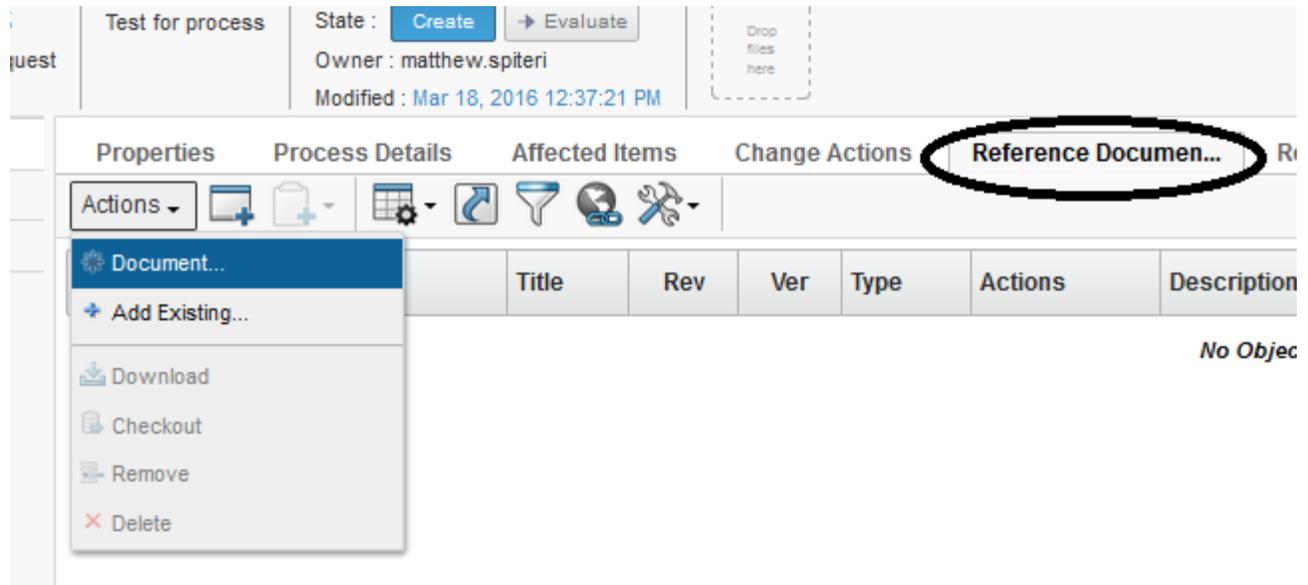
The screenshot shows a software interface with a left sidebar containing 'CR-0000163', 'Content', 'Collaboration', and 'Impact Analysis'. The main area has three tabs: 'Properties', 'Process Details', and 'Affect'. Below the tabs are icons for adding, deleting, and editing. A red italicized note reads 'Fields In red Italics are required'. The 'Process Change Details' section includes fields for 'Owner' (Matthew Spiteri), 'Process Affected' (empty), and 'Risk Assessment' (dropdown menu with 'TRUE' selected). A 'Description' field is partially visible at the bottom.

If a Change Originator tries to promote the Change Request without upload a Risk assessment document, an error message to provide the file is prompted



Version	8	Date:	30-April-2016
Status	Template		27

Select tab Reference Document, select command Document from Actions menu



Name and Type are retrieved automatically; user can enter title and description, has to select Document Type value to Risk Assessment; then select Next

**Step 1 of 2: Specify Details**

*Fields in red italics are required.*

**Name**   AutoName

**Type**  ..

**Policy**  ▾

**Title**

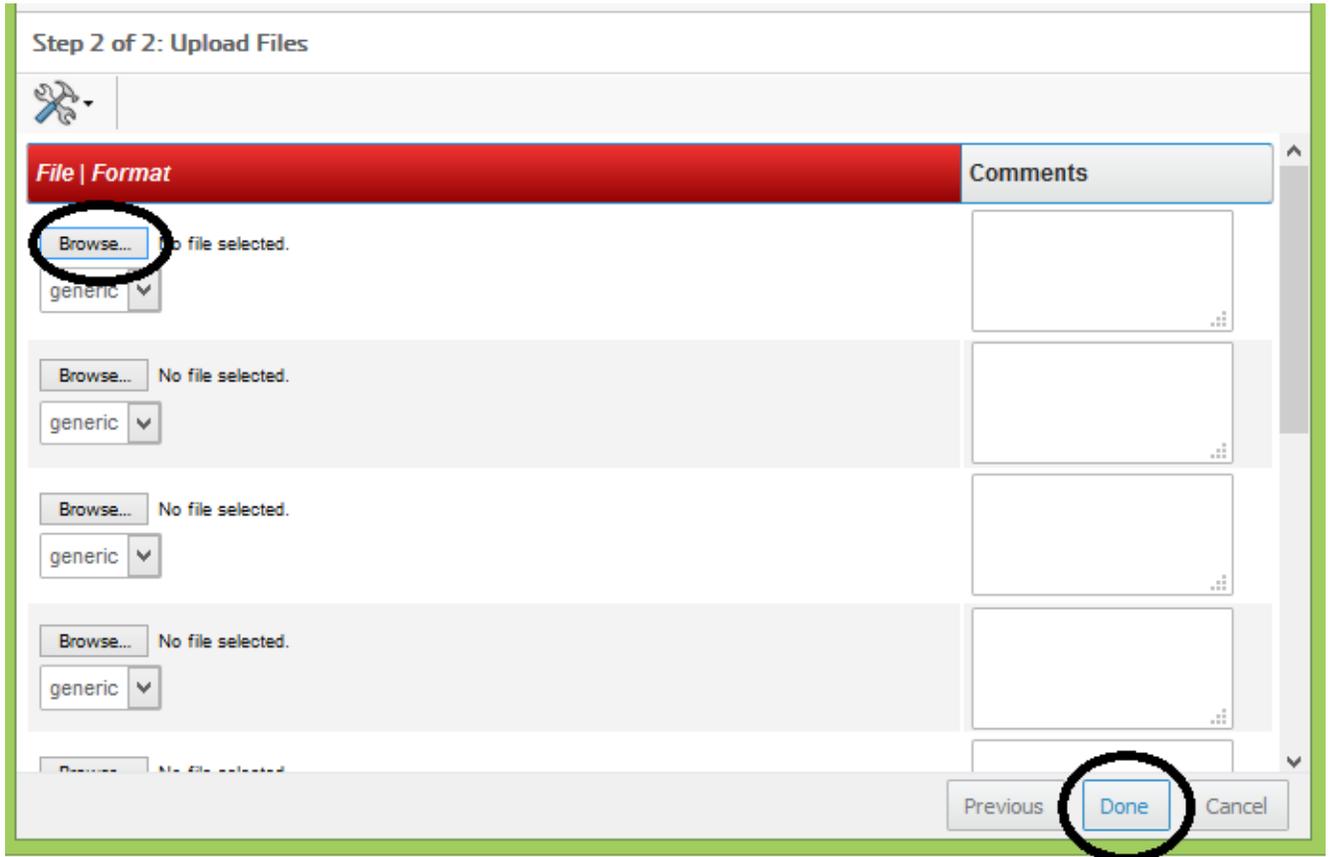
**Description**

**Document Approver Role**

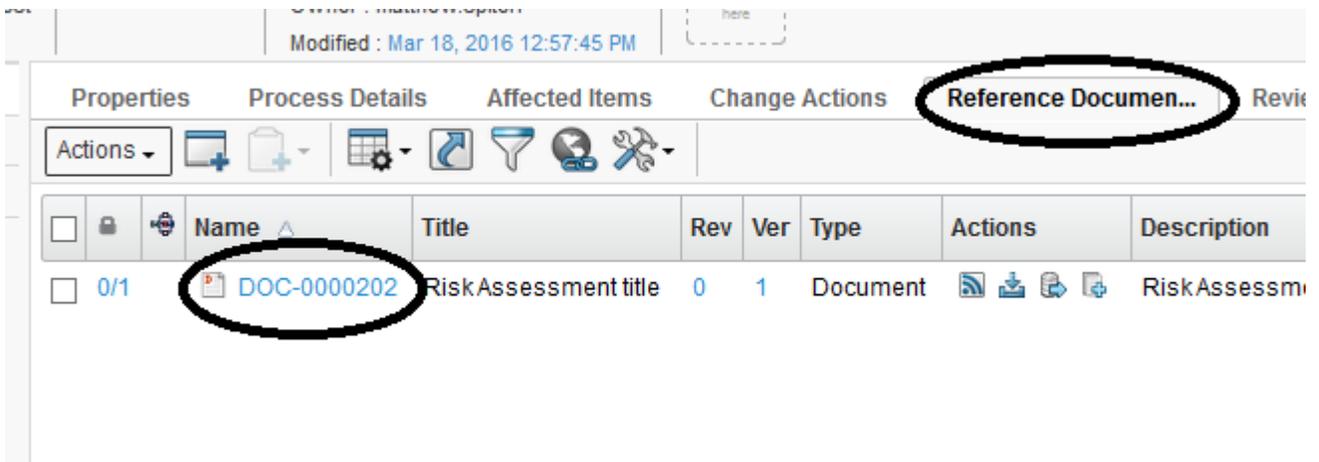
**Document Type**  ▾

User has to select a file from Explorer, then select Done

Version	8	Date:	30-April-2016
Status	Template		28



Document uploaded has to be released; select tab Reference Documents, select link to document name



User can use the dedicated icon in document header or select the command Lifecycle, contained in menu Category

Version	8	Date:	30-April-2016
Status	Template		29

DOC-0000202 Risk Assessment description State: Private In Work Frozen

Risk Assessment title Owner: Matthew Spiteri Modified: Mar 18, 2016 12:57:45 PM

Risk Assessment title

Files Name: DOC-0000202

File Versions Revision: 0

Revisions Type: Document

Issues Vault: eService Production

Routes Title: Risk Assessment title

Discussions Description: Risk Assessment description

Retention Schedules State: In Work

**Lifecycle** Owner: Matthew Spiteri

Multiple Ownership Originated: Mar 18, 2016

Access Modified: Mar 18, 2016

History Policy: Document Release

Where Used Access Type: Inherited

Classification Document Type: Risk Assessment

Classification Path(s)

After document is released, if the user wants to modify it, he has to create a new revision

Risk Assessment description Released Owner: matthew.spiteri Modified: Mar 18, 2016 1:02:36 PM

Lifecycle

DOC-0000202 rev 0: Lifecycle

Private In Work Frozen Released Obsolete

## Change Action assignee

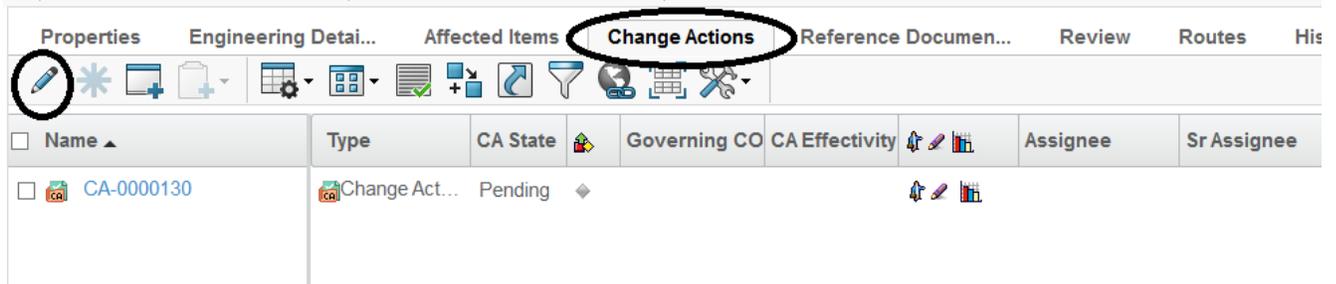
Step 1 User has to assign an Assignee to Change Action (user with role Design Engineer).

Change Request can contains several affected items, that can be evaluate and implemented in a single Change Action (with a user assigned) or using several Change Action (each Change Action can be implemented by different users on different periods).

Version	8	Date:	30-April-2016
Status	Template		30

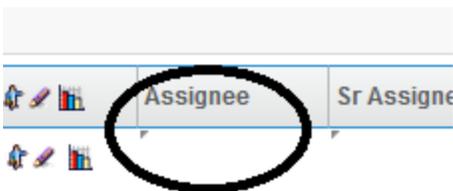
The Change Assignee will be the person that will create and update the new revision of part affected. At this stage, the Change Assignee is mandatory but can be changed also after the Change Request has been approved.

Select Change Actions command; select icon Edit

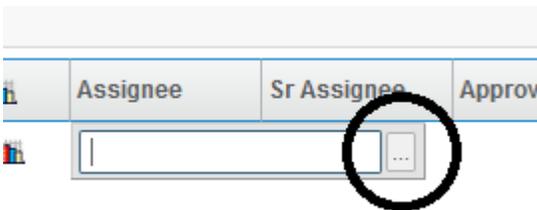


Enter Assignee, Senior Assignee and Planned End Date (only Assignee is mandatory at this stage).

To enter Assignee, click on text related to column Assignee



Click on icon “...” to search for Design Engineer



Select a user and click on button Submit

Version	8	Date:	30-April-2016
Status	Template		31

Search Refinement

Search Results 1 - 10 of approx. 10 Results | Page Size: 50 (Max Value: 1000)

Role: Design Engineer Author  
State: Active

Taxonomies

Types

Person(10)

Attributes

Name

Originated

Modified

Description

Change Assignment

Comment

Country

Name	Role	Full Name	Company
<input type="radio"/> alexanderg	Basic User, Librari...	Galea, Alexander	
<input type="radio"/> allen	Exchange User, Ba...	Bonnici Test, All...	
<input type="radio"/> evans	Basic User, Librari...	Stringos, Evan	
<input type="radio"/> Gino.vella	Basic User, Librari...	Vella, Eugenio	
<input type="radio"/> giuseppe.loreto	Basic User, Librari...	Loreto, Giuseppe	
<input type="radio"/> joseph.zammit	Basic User, Produ...	Zammit, Joseph	
<input type="radio"/> MarioP	Basic User, Desig...	Pullicino, Mario	
<input checked="" type="radio"/> matthew.spiteri	Exchange User, Ba...	Spiteri, Matthew	
<input type="radio"/> Samantha	Basic User, Librari...	Grima, Samantha	
<input type="radio"/> steve.zahra	Basic User, Librari...	Zahra, Steve	

Submit

Change Actions

Mass Update

Save

Name	Assignee	Senior Assignee	Approval List	Responsible Org	Planned End
CA-0000157	Matthew Spiteri			METHODE ELE...	Oct 30, 20...

User can also select Change Action link, select icon Edit in new window and assign Assignee, Senior Assignee and Estimated Finish Date

Version	8	Date:	30-April-2016
Status	Template		32

CA-0000113

Content

Collaboration

Impact Analysis

Related MCOs

Related Planning Change

Manufacturing Responsibi...

**Properties** Summary View Related CAs History >>

Change Action Details

Responsible Organization: Company Name ... Category of Change: Unassigned

Governing CO: ... Governing CR: CR-0000101

Reviewers and Approvers

Assignee: ... Clear Senior Assignee: ... Clear

Approvers List: ... Clear

Done Cancel

## Step 2 Change Action management

If the Change Request contains several affected items, Change Originator can implement several Change Action, for example one Change Action for each affected part.

If Change Request is related to several parts, by default PLM uses the same Change Action. Change Originator can split the parts in order to create several Change Actions.

CR-0000163

Test for process

State: Create Evaluate

Owner: matthew.spiteri

Modified: Mar 18, 2016 10:31:35 AM

CR-0000163

Content

Collaboration

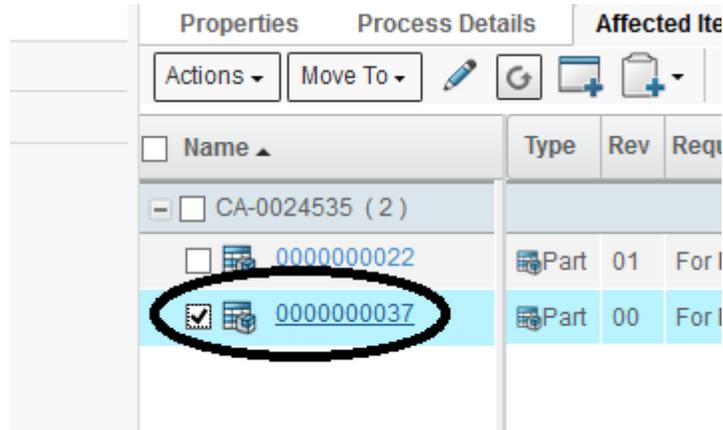
Impact Analysis

Properties Process Details **Affected Items** Change Actions Reference Documen... Review Routes

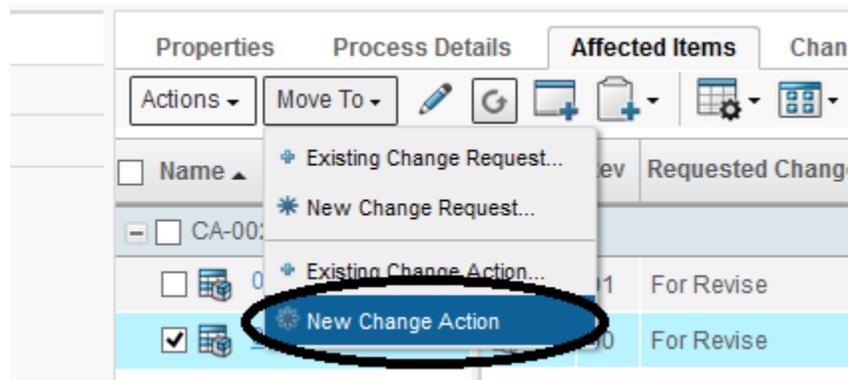
Name	Type	Rev	Requested Change	Change Cc	State	Related CA
CA-0024535 ( 2 )						
000000022	Part	01	For Revise		Released	CA-0024535
000000037	Part	00	For Revise		Released	CA-0024535

Version	8	Date:	30-April-2016
Status	Template		33

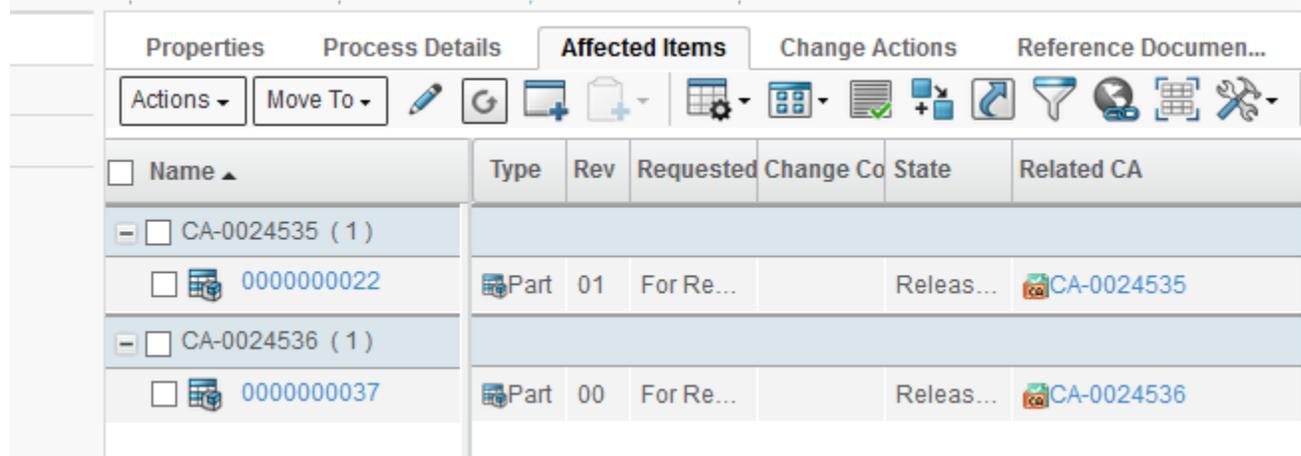
Select tab Affected Items, select the parts to be splitted from default Change Action



From Move To menu, select command New Change Action

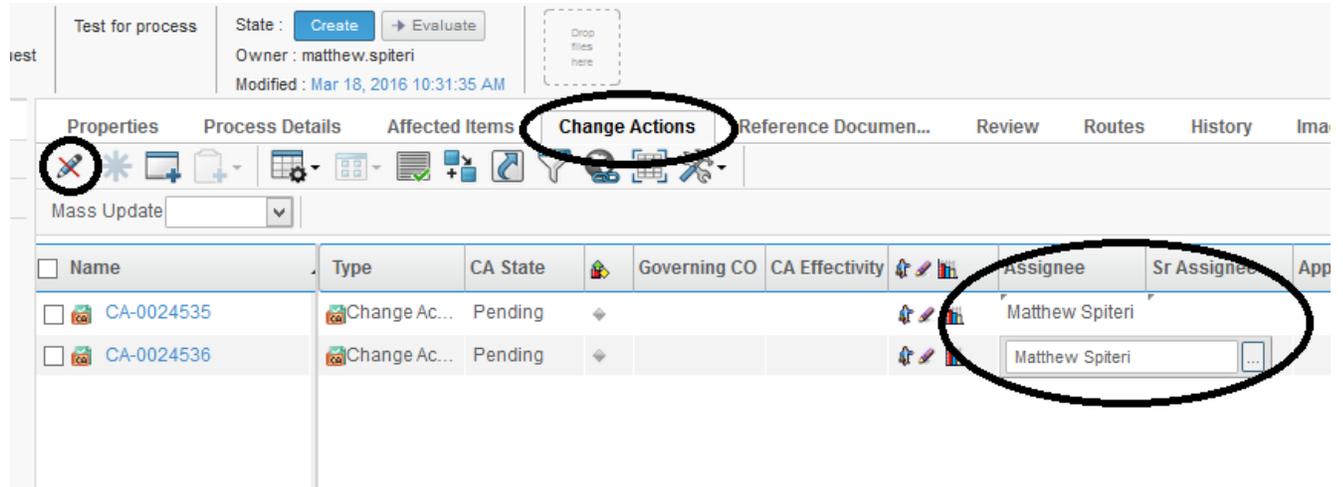


The system creates a new Change Action for select parts



Version	8	Date:	30-April-2016
Status	Template		34

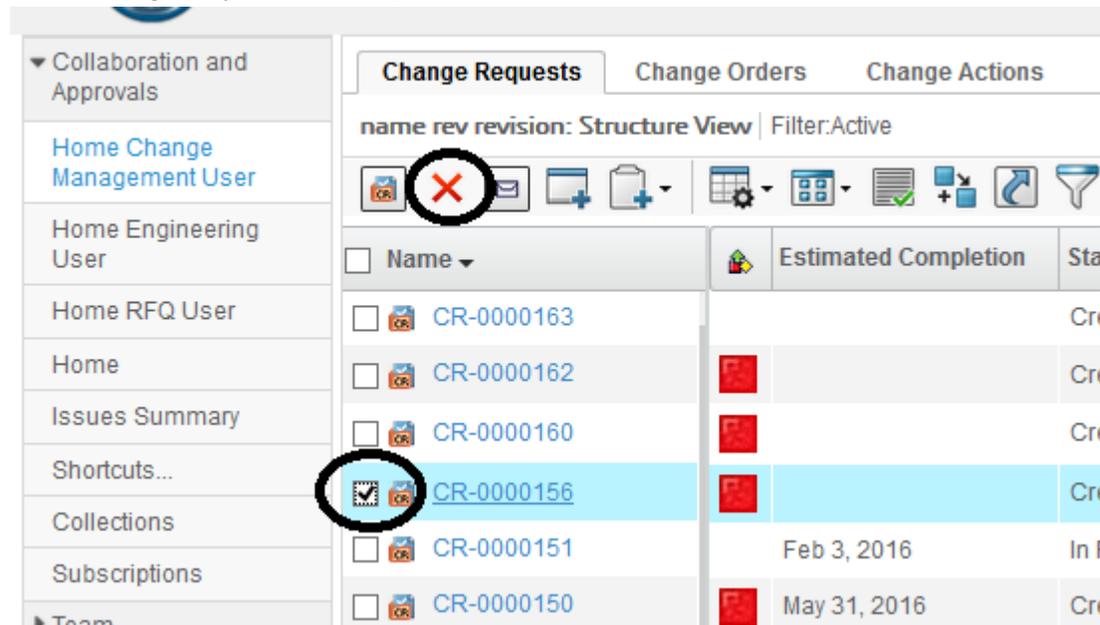
Select tab Change Actions in order to define Technical Assignee for all Change Actions created, select icon Edit and enter Technical Assignee



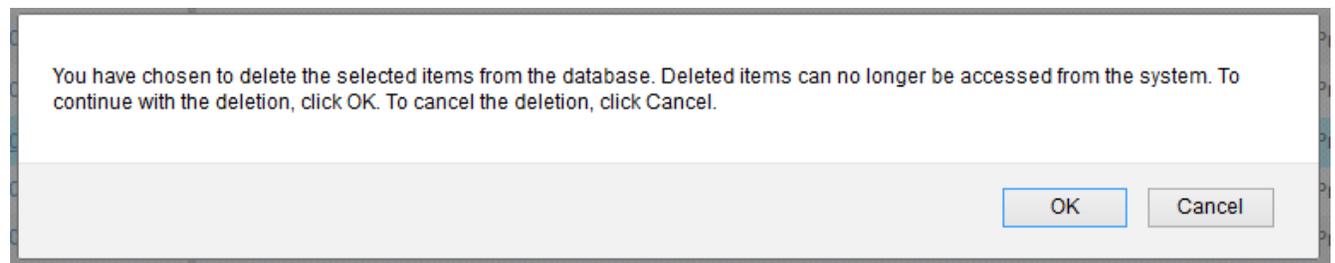
## Remove a Change Request

Step 1 Change Originator can remove a Change Request only in state Create

Select Change Request to delete; select icon Delete contained in tab toolbar

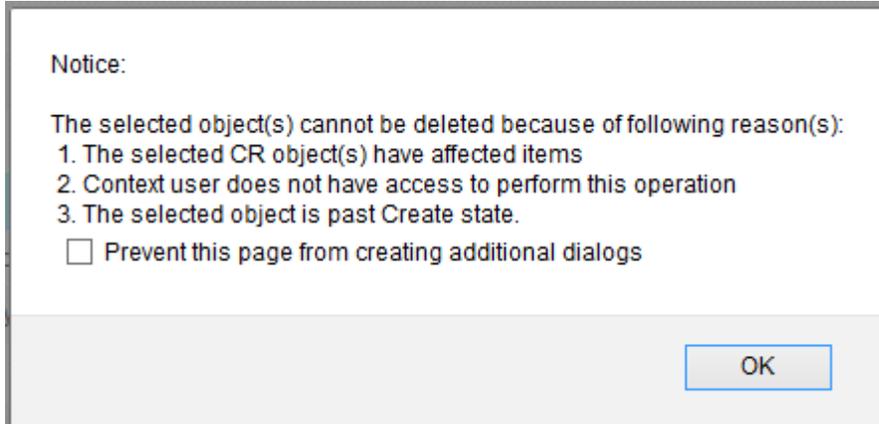


The user has to confirm the delete



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Status	Template		35

If user doesn't have the permission to delete the Change Request (state is not Create or the Change Request belongs to another users) or there are affected items connected to Change Request, the system raises an alert

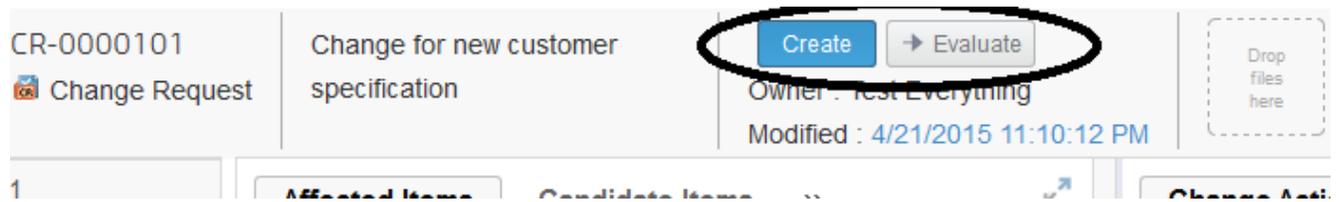


## Promote to state Evaluate (Change Coordinator ownership)

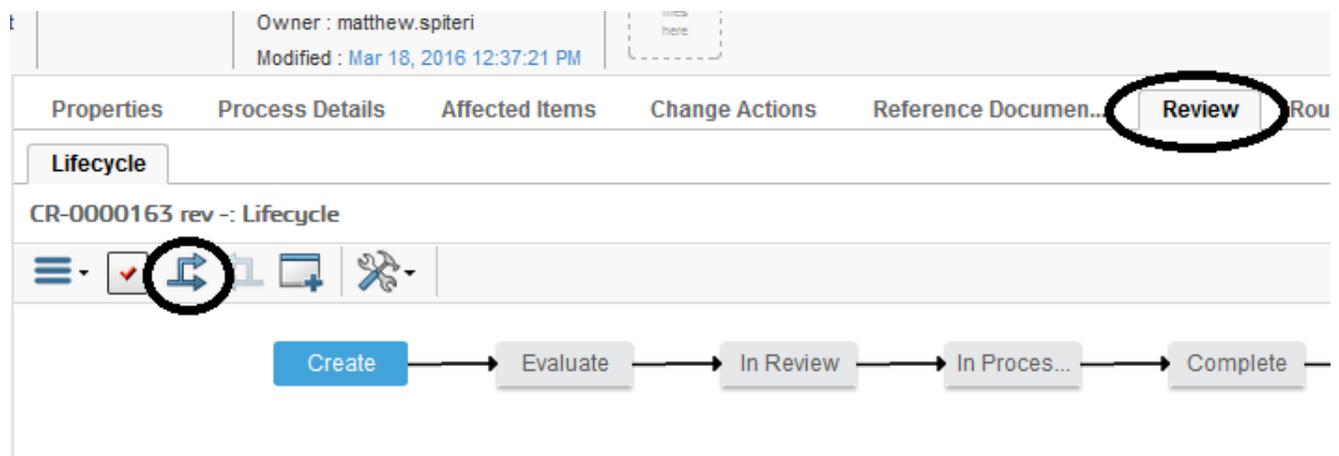
Step 1 User can promote Change Request to state Evaluate; Change Coordinator is the new owner of the Change Request and is notified through his dashboard and internal PLM mail.

Change Request originator can promote the Change Request to state Evaluate when all the information is completed. This will be evaluated by Change Management team. In state Evaluate, Change Request originator is not able to update information, only Change Coordinator has the permission at this stage.

In order to move to the next state, user can use the dedicated icon in the header



User can also select tab Review and select icon Promote

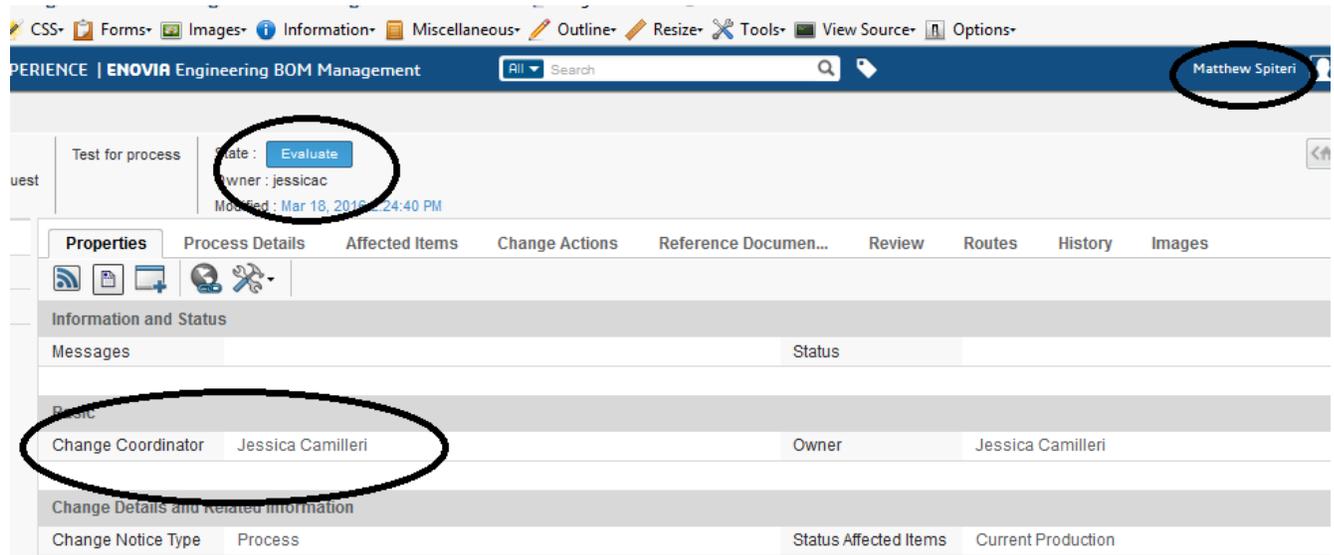


Version	8	Date:	30-April-2016
Status	Template		36

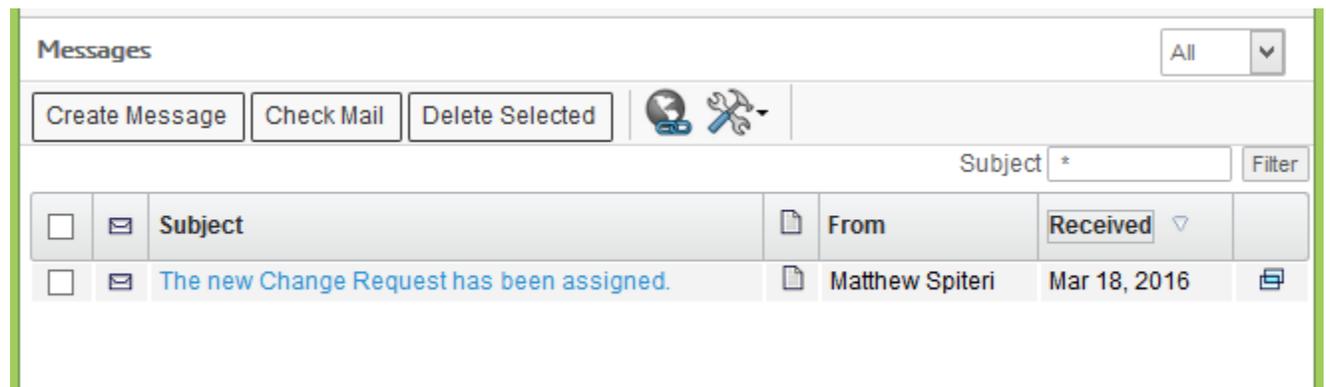
The system will perform checks before moving to the next state:

- If field Risk Assessment is TRUE, a document of type Risk Assessment has to be uploaded
- Change Actions have to be assigned
- Change Coordinator has been defined

After Change Originator moves to state Evaluate, the owner of Change Request becomes the Change Coordinator



Change Originator has no modify permission; Change Coordinator receives a notification from originator related to Change Request assignment

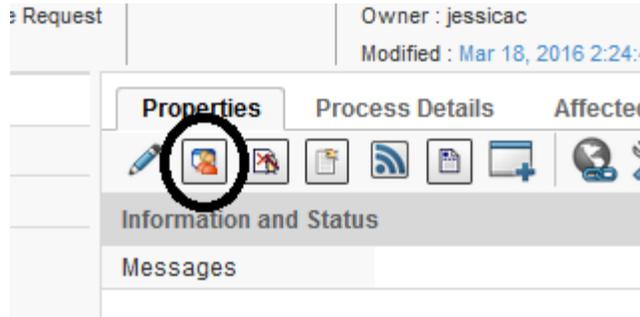


Version	8	Date:	30-April-2016
Status	Template		37

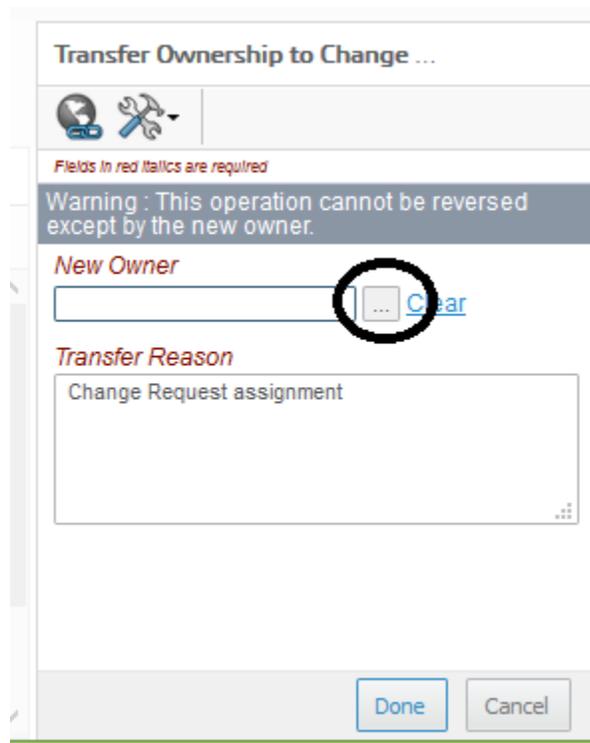
## Transfer ownership to another Change Coordinator

Change Coordinator can transfer the Change Request to another Change Coordinator

### Step 1 Select command Transfer Ownership

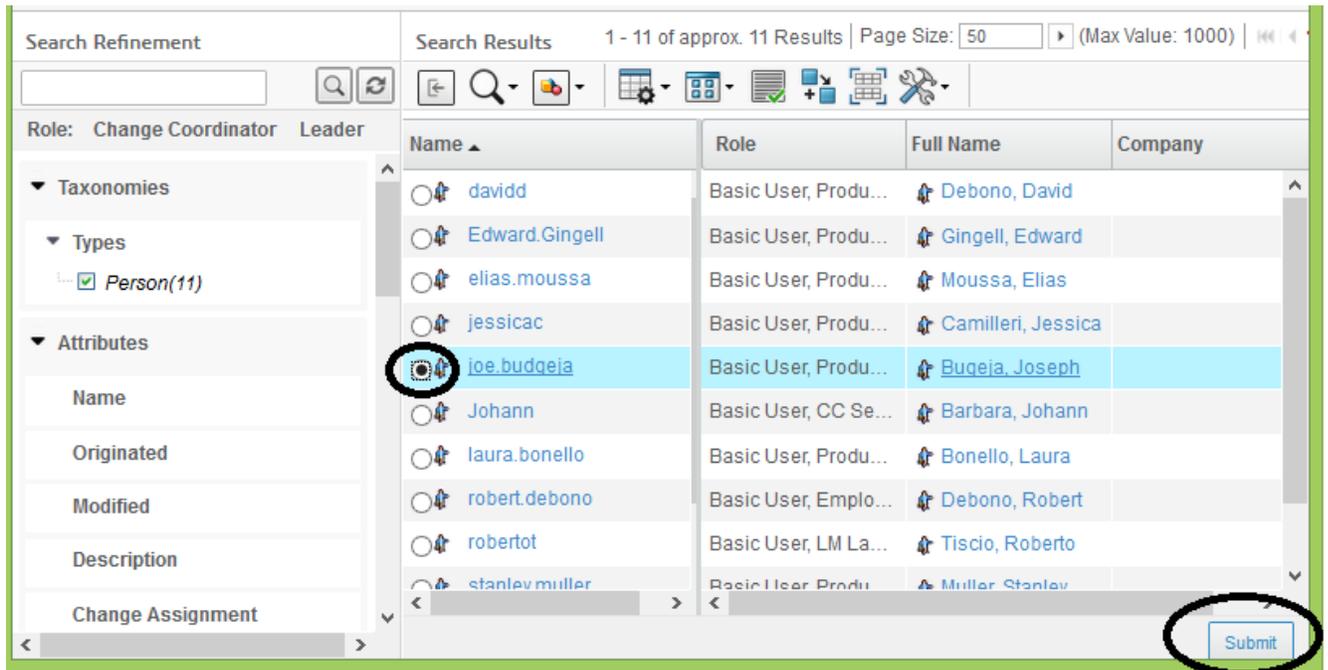


Change Coordinator has to enter a comment about transfer

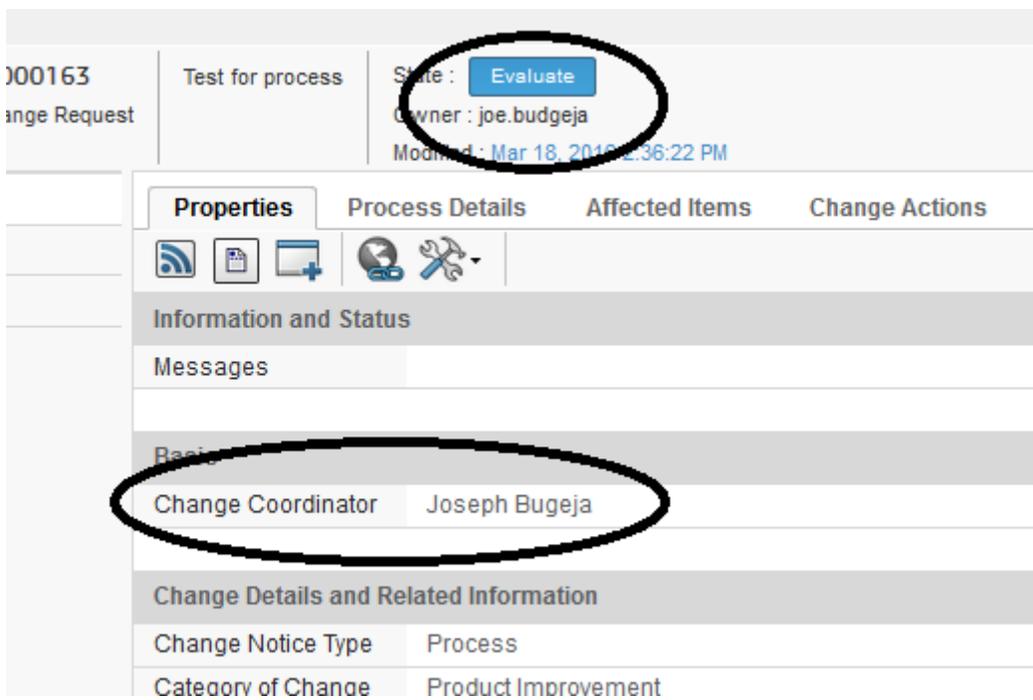


Change Coordinator has also to select another user

Version	8	Date:	30-April-2016
Status	Template		38

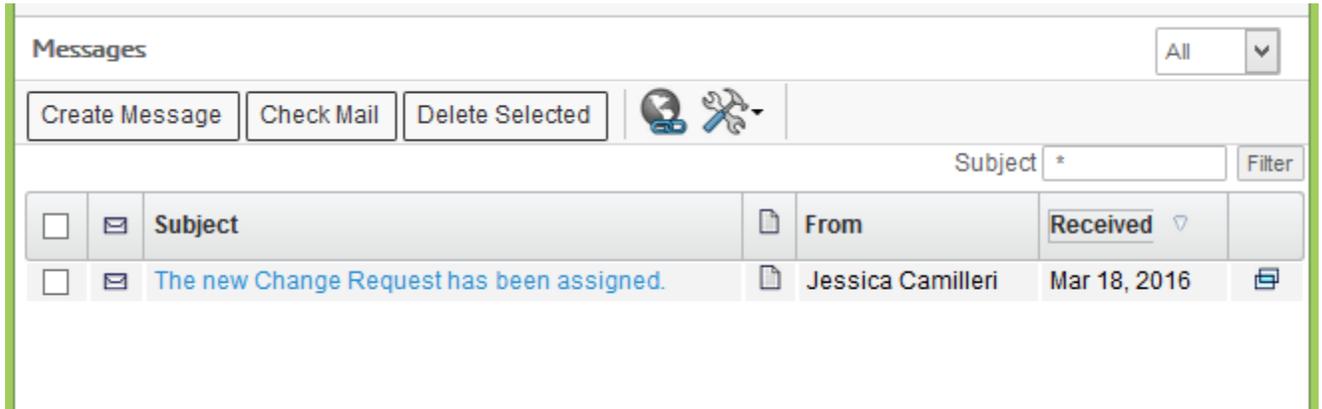


The new Change Coordinator is also the new Change Request owner



The new Change Coordinator receives a notification from previous one

Version	8	Date:	30-April-2016
Status	Template		39



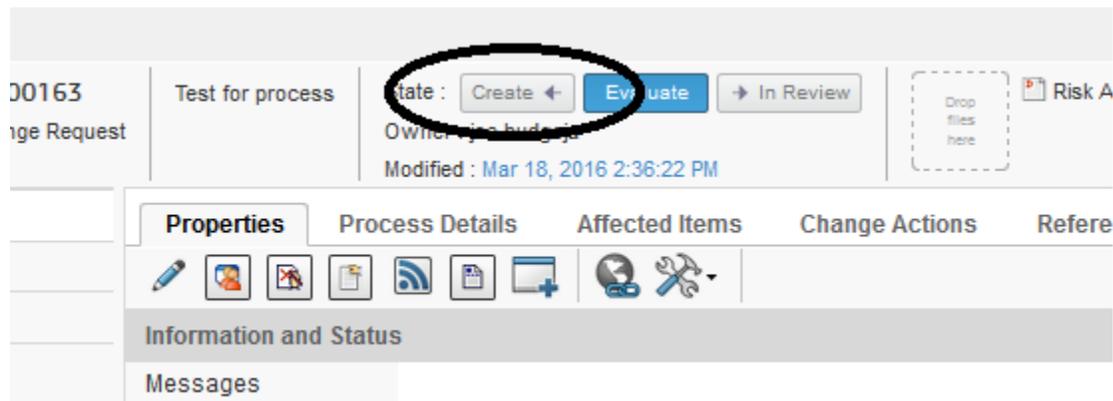
## Transfer back to Change Originator

If Change Request is not completed (i.e. information and reference documents provided from Change Request originator are not complete), Change Coordinator can send back the Change Request to originator

The Change Request has to be moved to state Create; after, Change Coordinator can change the ownership to Change Originator.

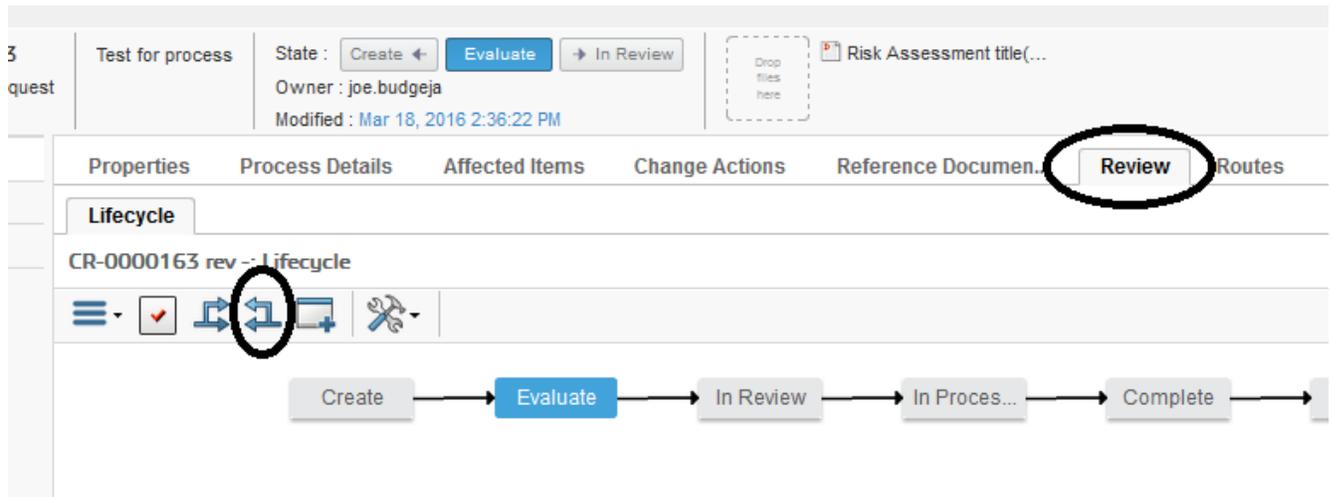
### Step 1 Move Change Request state from Evaluate to Create

User can use the dedicated icon contained in the header



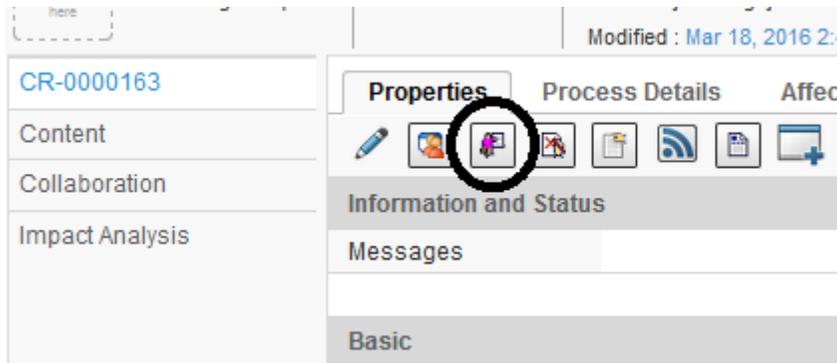
User can also select tab Review and select command to move back the state

Version	8	Date:	30-April-2016
Status	Template		40

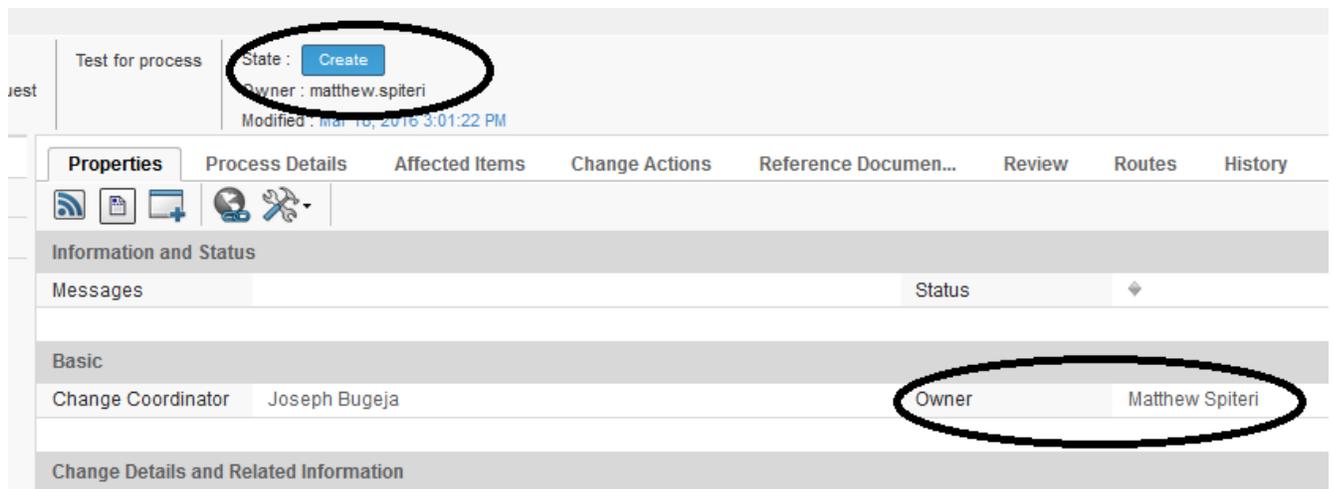


## Step 2 Change ownership to Change Originator

Select tab Properties, select icon Transfer Back to Initiator

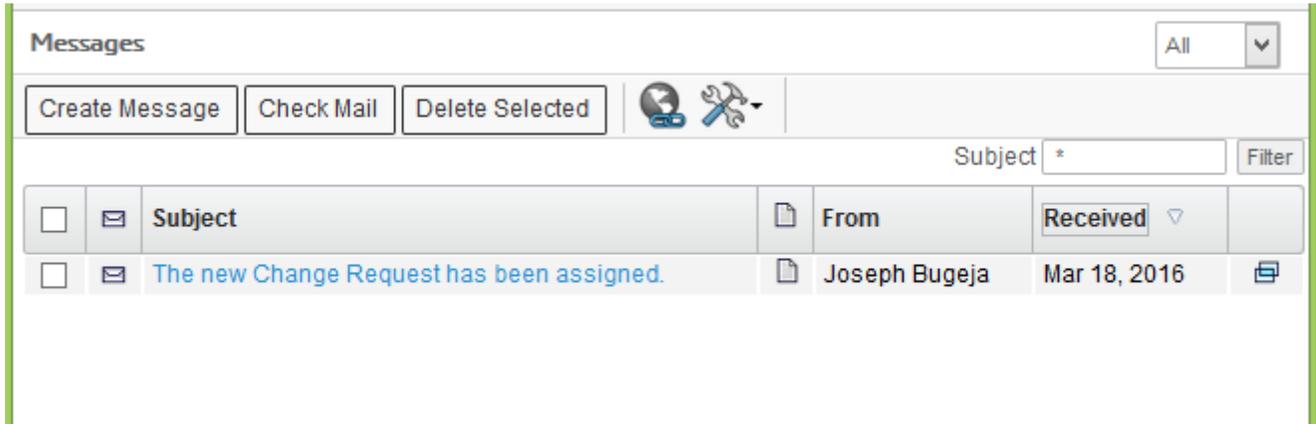


The Change originator becomes the Change Request owner



Change originator receives a notification from previous Change Coordinator

Version	8	Date:	30-April-2016
Status	Template		41

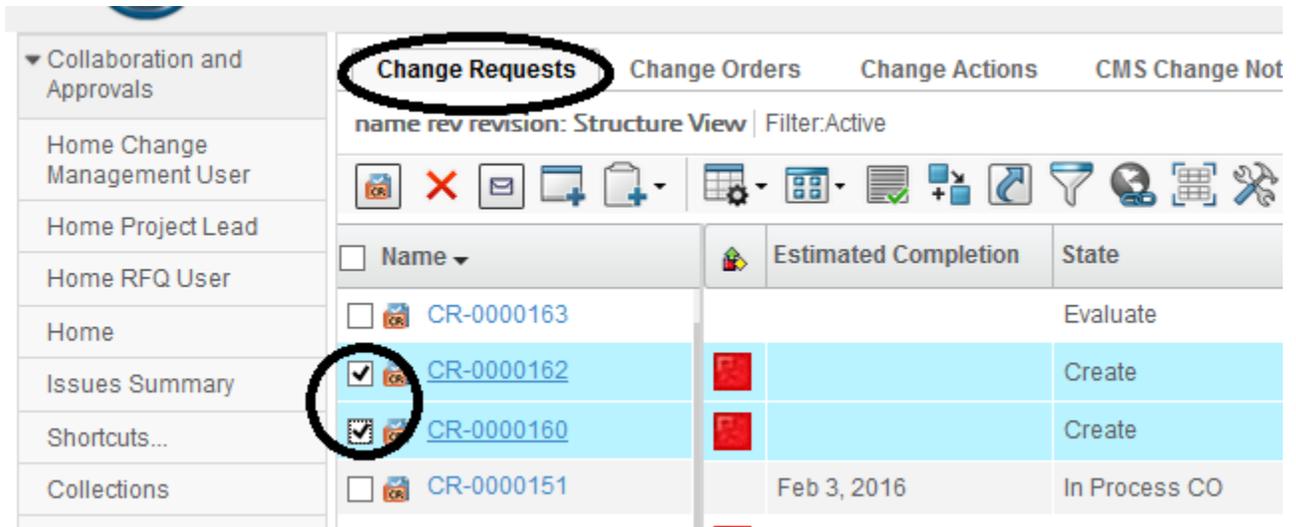


## Send Reminder

Change Coordinator can send a reminder to Change Originator if a Change Request has been created but not yet moved to state Evaluate.

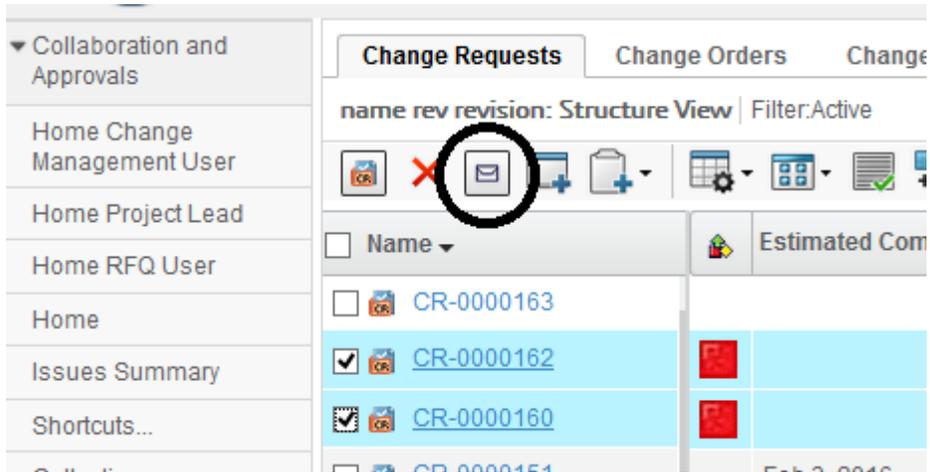
### Step 1 Select Change Requests

Select tab Change Request, select change to be notified



Version	8	Date:	30-April-2016
Status	Template		42

## Step 2 Select icon Send Reminder



## Step 3 Enter Subject and Message text (a default is provided) and select Done

**Send Notification**

*Fields in red Italics are required*

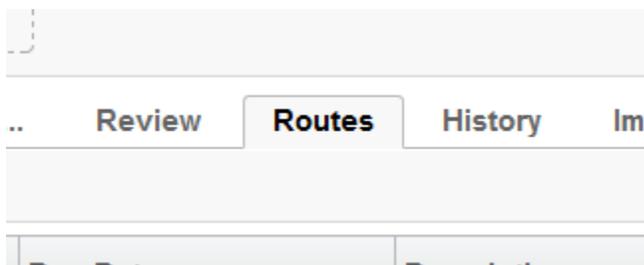
**Subject**

**Message**

## Change Request evaluation: Change Coordinator activities

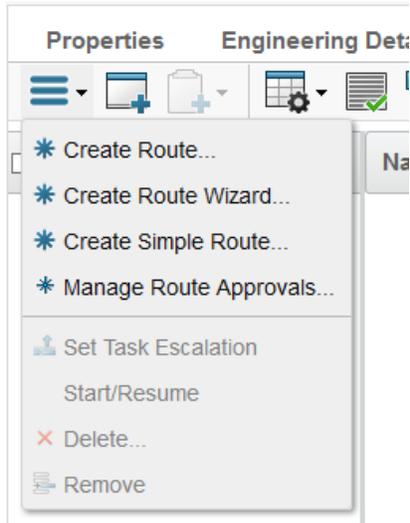
Step 1 Change Coordinator evaluates Change Request and define a team of people to upload and complete information and documents

Select tab Routes



Select a command to create a Route from Action menu

Version	8	Date:	30-April-2016
Status	Template		43



- Create Route: this process allows Change Coordinator to select a Route Template, if a predefined list of users is defined; task description is equals to all users and task execution is in parallel
- Create Route Wizard: this process allows Change Coordinator to specify each task and people involved: user can select people from a template or from a query, can specify for each user a different task description, can select task execution in parallel or sequential
- Create Simple Route: this process is the simplest one: Change Coordinator can select a list of people from a query (Change Coordinator can define a Member List if a predefined list of users is defined) and a Due Date; task description is equals to all users and task execution is in parallel

Version	8	Date:	30-April-2016
Status	Template		44

Step 2 Create Route

CR-0000117 | Create Route

Fields in red italics are required

Type Route

*Name*   AutoName

Template CN: Review Content ... [Clear](#)

*Description*

Review CN

Route Base Purpose Review ▼

Scope 
 All  
 Organization  
  ...

*Route Completion Action* Notify Route Owner ▼

Auto Stop On Rejection Immediate ▼

Attribute details:

- Route Name: autaname is provided

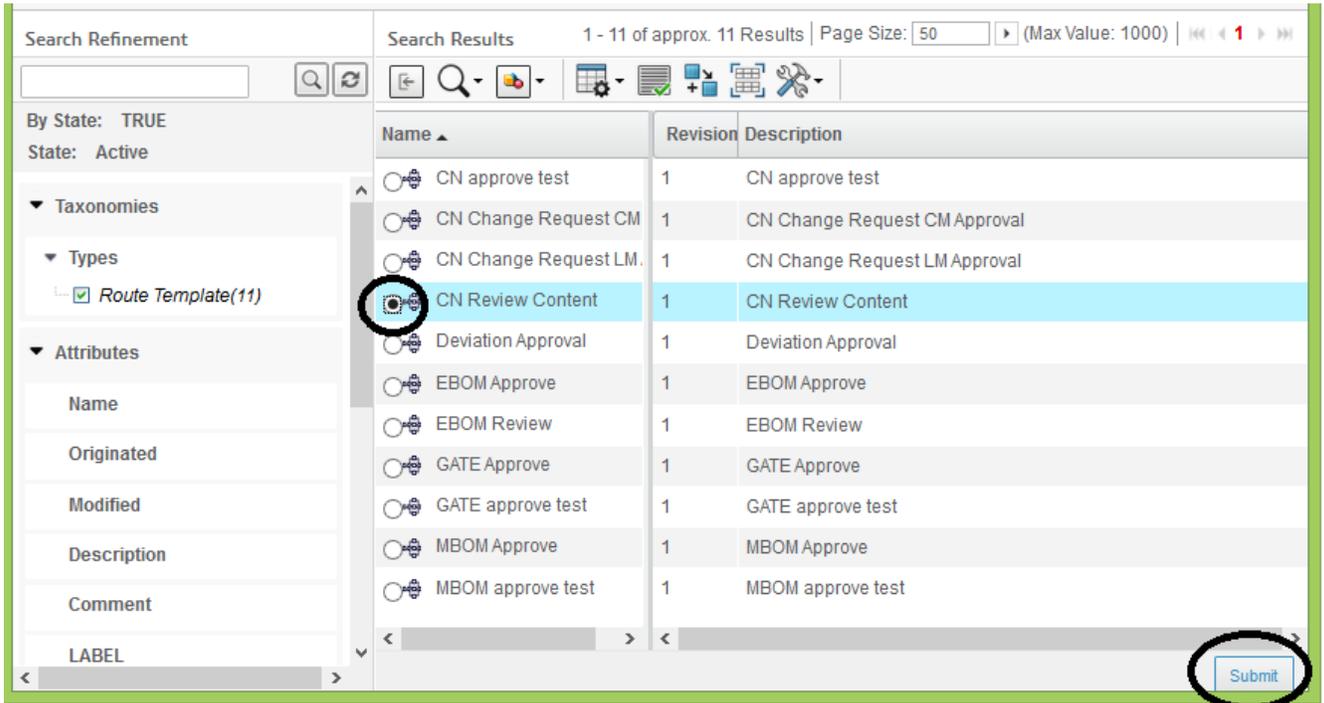
Fields in red italics are required

Type Route

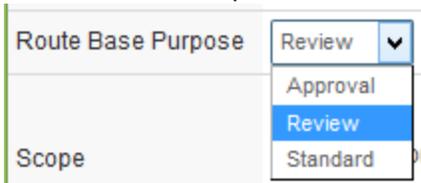
*Name*   AutoName

- Template: select the list of users involved in Change Request impact analysis (the templates are defined by PLM Administrator)

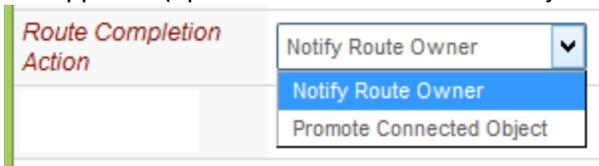
Version	8	Date:	30-April-2016
Status	Template		45



- Description is mandatory
- Route Base Purpose: select Review because the route is used to add information, not for an approval



- Scope: determines who can be added to route tasks; leave All or Organization
- Route Completion Action: select Notify Route Owner because the route is for review, not for an approval (option "Promote Connected Object" will be used in route for approval)



- Auto Stop On Rejection: if a user involved in route doesn't approve the task, all other tasks are closed (Immediate) or have to be evaluated (Deferred)



The route created is not started automatically

Version	8	Date:	30-April-2016
Status	Template		46

Test for process State : Create Evaluate In Review

Owner : joe.budgeja  
Modified : Mar 18, 2016 3:04:23 PM

Risk Assessment title(...)

Properties Process Details Affected Items Change Actions Reference Documen... Review **Routes** Hist

Name	Route Status	Due Date	Descripti
R-0000258	<b>Not Started</b>		CN Revie

### Step 3 Create Route Wizard

The process is composed by 4 steps:

- Define route type and if route has to be executed immediately
- Define people involved
- Define tasks
- Define approval for concurrent tasks

Define route details

Version	8	Date:	30-April-2016
Status	Template		47

**Step 1 of 4: Specify Details**

Add Content Remove Selected

*Fields in red Italics are required.*

**Name**   AutoName

Template  ... Clear

**Description**

Route Base Purpose Standard ▾

Scope  All  
 Organization  
 Select Scope ...

**Route Completion Action** Notify Route Owner ▾

Start Route  Upon Wizard Completion  
 Manually

Auto Stop On Rejection Immediate ▾

**Content**

<input type="checkbox"/>	Name /	Rev	Ver	State Condition
<input type="checkbox"/>	CR-0000163	-		Evaluate ▾

Next Cancel

Attribute details (other than attributes described in “Create Route”)

- Start Route: select Upon Wizard Completion to start route immediately after route creation; select Manually if Change Coordinator wants to adjust tasks and people involved

Version	8	Date:	30-April-2016
Status	Template		48

There is also a section related to route contents, that is used to approve or review different objects (not used for Change Request)

Step 1 of 4: Specify Details

Add Content Remove Selected

Fields in red Italics are required.

Content

<input type="checkbox"/>	Name <i>f</i>	Rev	Ver	State Condition
<input type="checkbox"/>	CR-0000163	-		Evaluate

Next Cancel

Define people involved: select command Next.

If a template was selected in first page, the user contained in template definition are already added to route definition

Step 2 of 4: Select Route Members

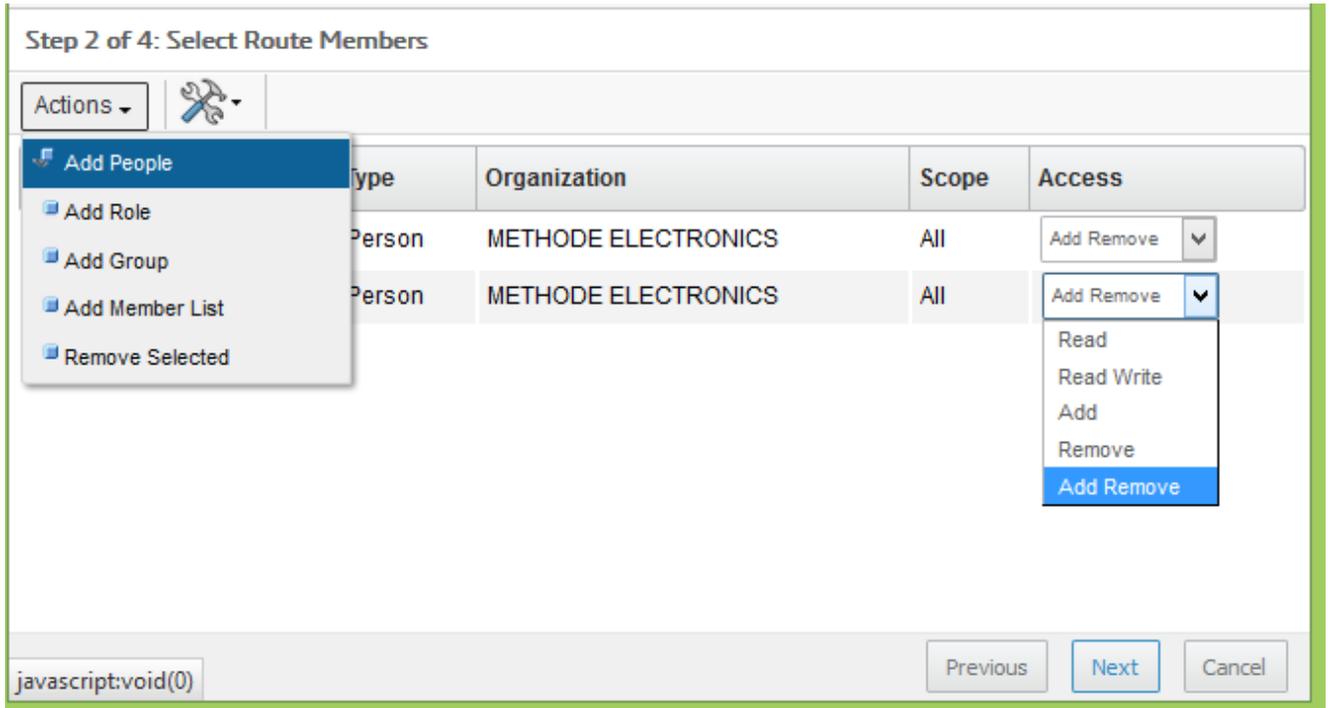
Actions

<input type="checkbox"/>	Name <i>f</i>	Type	Organization	Scope	Access
<input type="checkbox"/>	Barbara, Johann	Person	METHODE ELECTRONICS	All	Add Remove
<input type="checkbox"/>	Spiteri, Matthew	Person	METHODE ELECTRONICS	All	Add Remove

Previous Next Cancel

Version	8	Date:	30-April-2016
Status	Template		49

Change Coordinator can add users using commands contained in Actions menu; can also define different permission on Change Request information. In order to allow people involved to modify Change Request details, set access to “Add Remove”; by default, people added has only Read permission



Define tasks: select command Next

Version	8	Date:	30-April-2016
Status	Template		50

For each user defined in previous page, a route task is created.

**Step 3 of 4: Define Route Tasks**

Actions 

<input type="checkbox"/>	Title, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
<input type="checkbox"/>	<input type="text"/> <b>Action</b> Comment <input type="text"/> <b>Order</b> 1 <input type="text"/>	Grima, Samantha <input type="text"/> <input type="text"/>	<input checked="" type="radio"/> <input type="text"/>  5:00 PM <input type="text"/> Clear <b>Advanced</b> <input type="radio"/> <input type="text"/> day(s) from Route Start Date <input type="text"/> <input type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review
<input type="checkbox"/>	Review CN <b>Action</b> Comment <input type="text"/> <b>Order</b> 1 <input type="text"/>	Spiteri, Matthew <input type="text"/> Review CN <input type="text"/>	<input type="radio"/> <input type="text"/>  5:00 PM <input type="text"/> Clear <b>Advanced</b> <input type="radio"/> <input type="text"/> day(s) from Route Start Date <input type="text"/> <input checked="" type="radio"/> Assignee-Set Due Date <input checked="" type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review
<input type="checkbox"/>	Review CN <b>Action</b> Comment <input type="text"/> <b>Order</b> 1 <input type="text"/>	Barbara, Johann <input type="text"/> Review CN <input type="text"/>	<input type="radio"/> <input type="text"/>  5:00 PM <input type="text"/> Clear <b>Advanced</b> <input type="radio"/> <input type="text"/> day(s) from Route Start Date <input type="text"/>

Previous **Next** Cancel

For each route task, Change Coordinator has to define:

- Title and instructions: mandatory; the attributes are already defined for tasks created from template; for other task, values are to be defined
- Action: in case of route of type Review, action is Comment
- Order: default value 1 means all tasks are executed in parallel; defining different orders means define dependencies between route tasks
- Due Date and Time: estimated finish date
  - o Can be defined as a date

Version	8	Date:	30-April-2016
Status	Template		51

5:00 PM 
  
[Clear](#)

- A number of slip days after route start date

day(s) from
   
 Route Start Date

- When the route start
  - Assignee-Set Due Date

- Change Coordinator can define if task can be delegated

Allow Delegation
   
 Review

- Change Coordinator can define if it's necessary another review by Change Coordinator in order to complete the task (not used in case of route of review, like in this case)

Requires Owner

Define approval for concurrent tasks: select command Next

**Step 4 of 4: Action Required**



Order	Name	Action	Action Required
1	Review CN	Comment	<input type="radio"/> Any <input checked="" type="radio"/> All
1	Review CN	Comment	
1	Review CN	Comment	

- Any: when one person completes a task in the set of concurrent tasks, all other tasks with same order level are deleted.
- All: all tasks in the set of concurrent tasks must be completed

#### Step 4 Create Simple Route

Version	8	Date:	30-April-2016
Status	Template		52

### Create Simple Route

Add Content
Remove Selected

Fields in red italics are required.

#### Route Details

Instructions

Action

Comment ▼

Due Date

Start Route Immediately

Allow Delegation

#### Route Task Recipients

Properties
 Remove

Add Role

Add Group

Add People

Add Member List

#### Content

	<i>Name</i>	Rev	Ver	State Condition
<input type="checkbox"/>	CR-0000163	-		<span>Evaluate</span> <span style="font-size: small;">▼</span>

Done
Cancel

Attribute details:

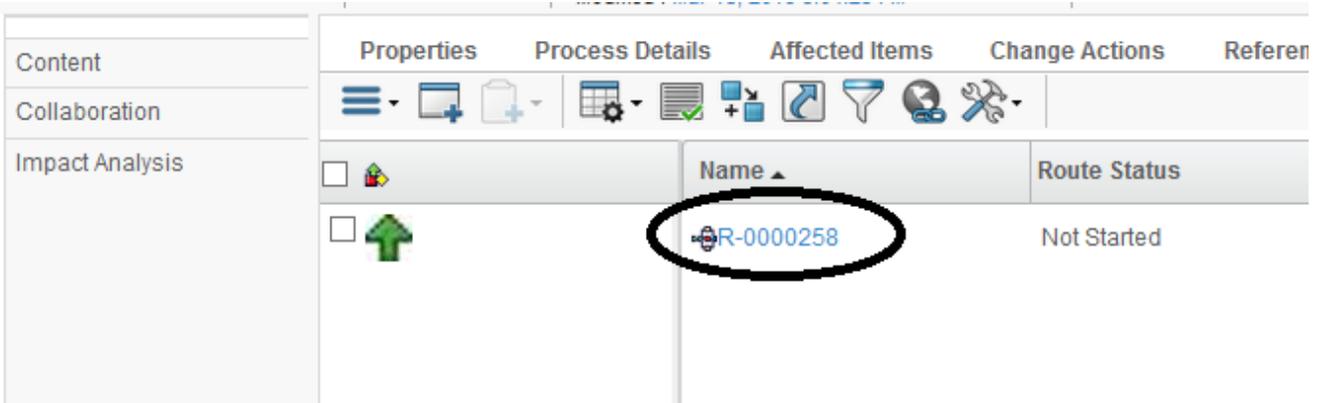
- Instructions: description of task
- Action: Comment, Approve, Standard; in this case, select Comment
- Due Date: estimated finish date for all tasks
- Start Route Immediately: if selected, route starts after user select command Done, otherwise has to be started manually
- Allow Delegation: if people involved can delegate tasks
- Route Task Recipients: Change Coordinator can use the command Add Role, Add Group, Add People and Add member List in order to define people involved

#### Step 5 Update and start route manually

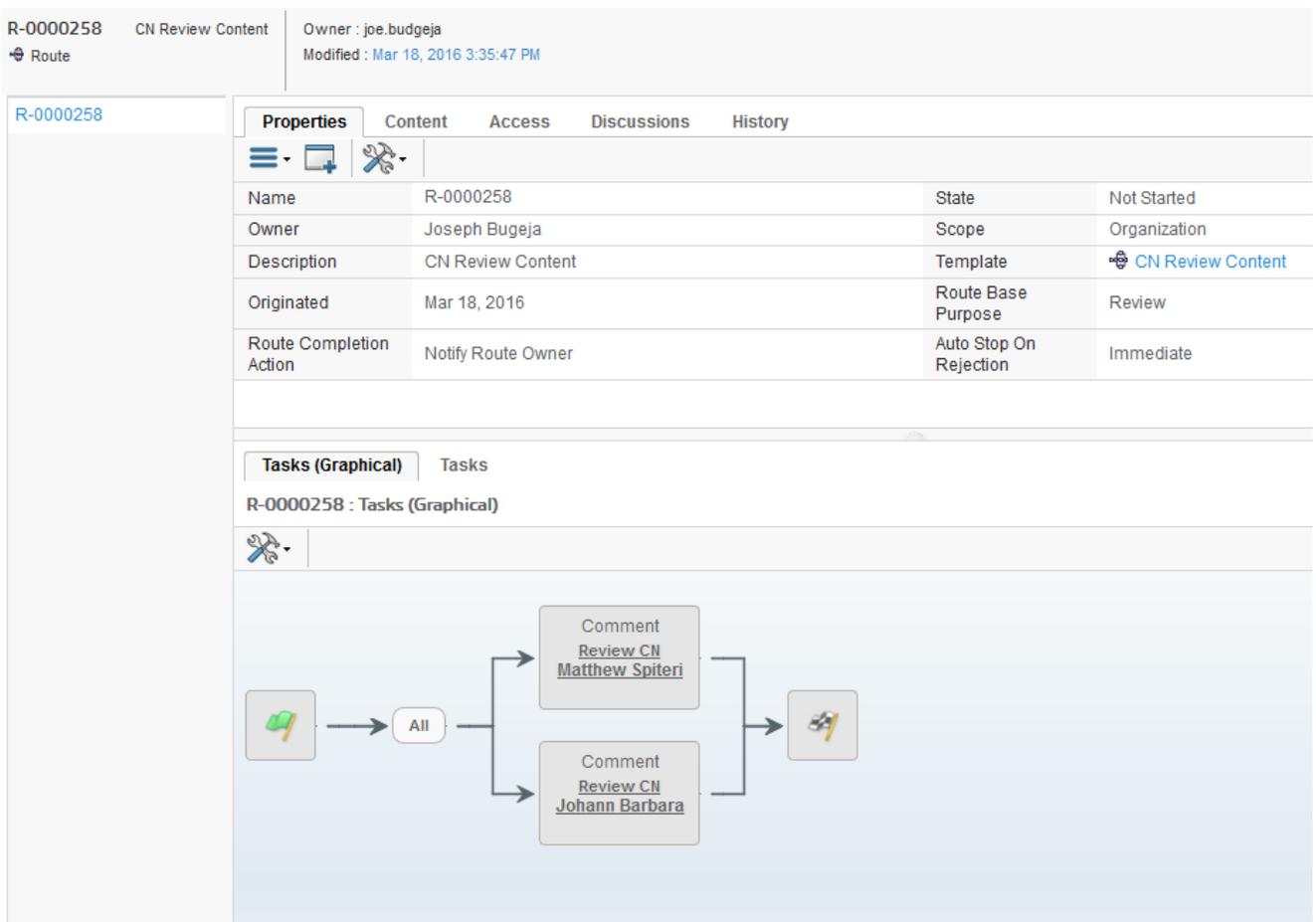
If route process is not started, Change Coordinator can modify it in order to add or remove people involved, change route instruction and people access.

Version	8	Date:	30-April-2016
Status	Template		53

Select link related to route



The page with route details contains several tabs:

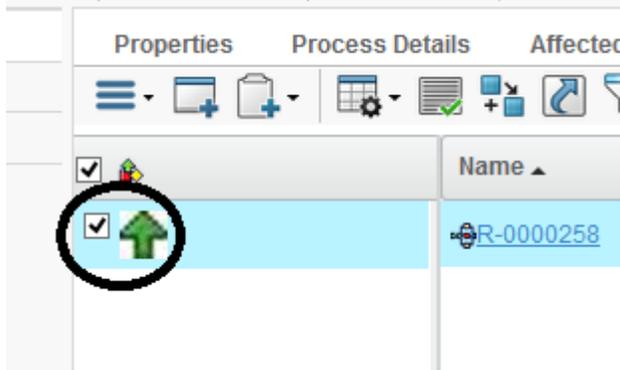


- Properties shows attribute details
- Content shows objects affected by route process (in this case, the Change Request)
- Access shows people involved and allows Change Coordinator to modify access and add people
- Tasks shows tasks and people involved and allows Change Coordinator to add people and tasks

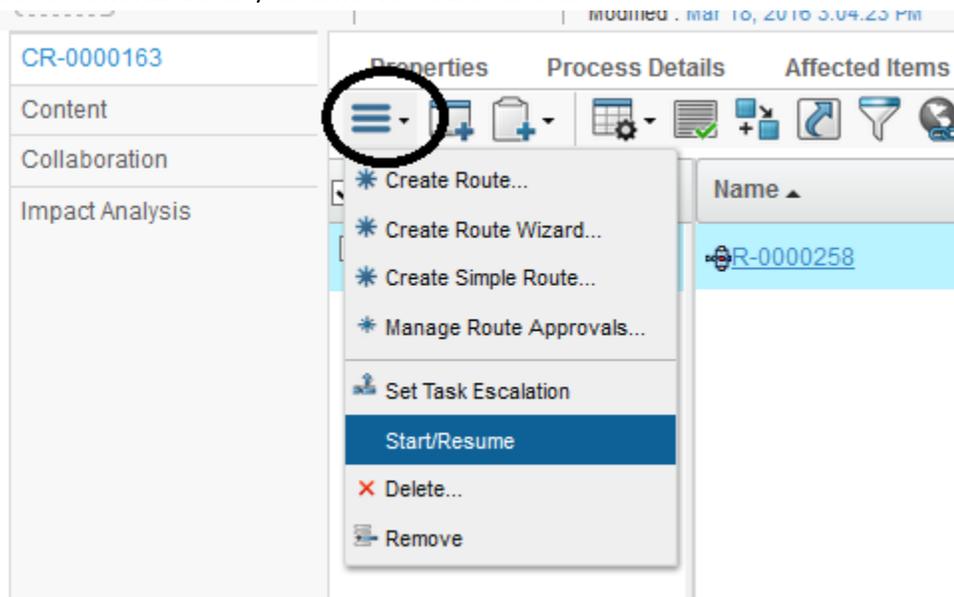
To start manually a route, select tab Route and select checkbox related to route

Version	8	Date:	30-April-2016
Status	Template		54

In order to start the route and notify people involved, from tab Route select the checkbox related to route created



Select command Start/Resume from Actions menu



Change Coordinator can also delete a route already created, in order to create another one with different people involved

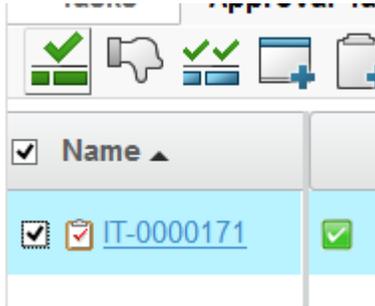
## Change Request evaluation: Core Team activities

Step 1 People involved in Core Team have to add impact analysis and documents

People involved are notified; in tab Approval Task, users can select the Change Request link or Name link

Version	8	Date:	30-April-2016
Status	Template		55





- Select the Complete icon in table



- Select the task name and select the Complete icon in task form



User has to enter a comment

### Add Comments

*Comments*

Engineering impact analysis document uploaded

Change Coordinator is notified each time a task is completed or rejected. If a task is rejected, the route process is stopped; Change Coordinator can cancel the Change Request, can resume the Route process or can create another Route process.

When all tasks related to Route process are completed, Change Coordinator is notified; using tab Review, Change Coordinator can check which tasks are completed.

Version	8	Date:	30-April-2016
Status	Template		57

Tasks/Signatures		Approvals			
<input type="checkbox"/>	<b>State</b>	<b>Assignee</b>	<b>Task/Signature</b>	<b>Task Title</b>	<b>Comments/Instructions</b>
<input type="checkbox"/>	Create				
<input checked="" type="checkbox"/>	<b>Evaluate</b>	Matthew Spiteri	<input checked="" type="checkbox"/> IT-0000171	IT-0000171	Engineering impact analysis document uploaded
<input checked="" type="checkbox"/>	<b>Evaluate</b>	Samantha Grima	<input checked="" type="checkbox"/> IT-0000172	IT-0000172	Doc uploaded
<input checked="" type="checkbox"/>	<b>Evaluate</b>	Johann Barbara	<input checked="" type="checkbox"/> IT-0000173	IT-0000173	New timing plan uploaded
<input checked="" type="checkbox"/>	<b>Evaluate</b>	Michael Mizzi	<input checked="" type="checkbox"/> IT-0000174	IT-0000174	Doc uploaded
<input type="checkbox"/>	In Review				
<input type="checkbox"/>	In Process CO				
<input type="checkbox"/>	Complete				
<input type="checkbox"/>	On Hold				
<input type="checkbox"/>	Cancelled				

Change Coordinator can check and download documents; can also upload new documents used during Change Request approval

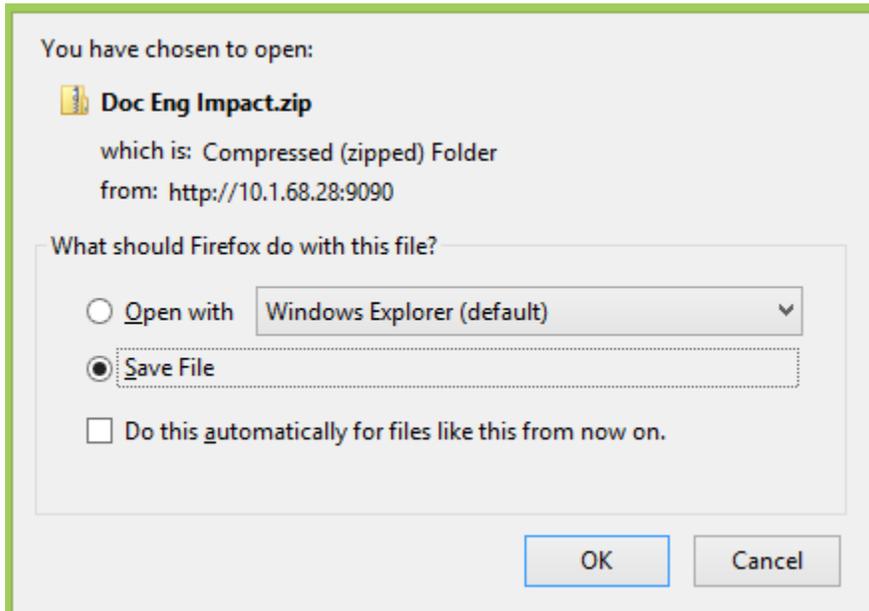
Select tab Reference Document, select documents to download or use the dedicate icons in table

Properties		Engineering Detai...		Affected Items		Reference Documen...		Review		Routes		History		Images	
<input checked="" type="checkbox"/>	<input type="checkbox"/>														
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Name $\Delta$	Title	Rev	Ver	Type	Actions	Description						
<input checked="" type="checkbox"/>	0/1	<input checked="" type="checkbox"/>	DOC-0000091	Doc Eng Impact	0	1	Document		Document wit						
<input checked="" type="checkbox"/>	0/1	<input checked="" type="checkbox"/>	DOC-0000092	Doc Manufacturing Impact	0	1	Document		Doc Manufact						
<input checked="" type="checkbox"/>	0/1	<input checked="" type="checkbox"/>	DOC-0000093	LM Impact	0	1	Document		LM Impact						
<input checked="" type="checkbox"/>	0/1	<input checked="" type="checkbox"/>	DOC-0000094	Logistic impact analysis	0	1	Document		Logistic impac						

Select Download from Actions menu

Properties		Engineering D	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Actions</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Document...		
	Add Existing...		
	<b>Download</b>		
	Checkout		
	Remove		
	Delete		

Version	8	Date:	30-April-2016
Status	Template		58



Reviewing the information provided by the users, Change Coordinator is able to complete the impact analysis in Engineering, Supplier and Process form.

In state Evaluate, Change Coordinator can define the date for Estimated Completion (or update, if date was entered by Change Request originator).

## Change Request ready for approval

Step 1 Change Coordinator defines a reviewer list and promote the Change Request to “In Review” state  
When Change Request information is completed, select icon Edit and complete Evaluation Reviewer List

Version	8	Date:	30-April-2016
Status	Template		59

CR-0000101 Change for new customer specification

Change Request

Create Evaluate In Review

Owner : Test Everything

Modified : 4/21/2015 11:42:26 PM

CR-0000101

Content

Collaboration

Impact Analysis

**Properties** History Images

Severity Low

**Reviewers and Approvers**

Evaluation Reviewers List

... Clear

**Extended Attributes**

Distribution List

... Clear

Originated Apr 21, 2015 Modified Apr 21, 2015

Done Cancel

Reviewer list can be different depending on the type of change; reviewer list can be defined as Global or related to a single Plant.

Search Results 1 - 3 of approx. 3 Results | Page Size: 50 (Max Value: 1000)

Name ▲	Rev	Description	Availability	Organization
<input type="radio"/> CN: Approve Change Request	1	Review CN Complete	Enterprise	METHODE ..
<input type="radio"/> CN: Review Content	1	Review CN	Enterprise	METHODE ..
<input type="radio"/> EBOM: Review	1	Review EBOM	Enterprise	METHODE ..

Submit

Step 2 Change Coordinator promotes Change Request to In Review state; a review process starts, in order to define if Change Request is accepted.

Change Control Board and Change Coordinator can check all Change Requests in state "In Review" from a dashboard reporting all Change Requests, using a Refinement function

Version	8	Date:	30-April-2016
Status	Template		60

Change Requests - Refinements

Change Requests | Change Orders | Projects

name rev revision: Structure View | Filter:Active

Estimated Completion

State

Type of Change notice

Status EC Affected Items

Owner

Last Modified

Name	Estimated Completion	State	Description	Type
CR-0000117		In Review	Change Index component	Eng

Reset Close

Change Request form is updated with information related to people involved in review process

Properties | Engineering Detai... | Affected Items | Reference Documen... | Review | Routes | History | Images

Basic

Change Coordinator	Robert Debono	Owner	Robert Debono
--------------------	---------------	-------	---------------

Change Details and Related Information

Change Notice Type	Engineering	Status Affected Items	Launch
Category of Change	Product Improvement	Severity	High
Description	Change Index component	Reason for Change	New component
Duration Alert Days	5		

Reviewers and Approvers

Evaluation Reviewers List	CN: Approve Change Request	Distribution List
	Alexander Galea Michael Mizzi Johann Barbara Samantha Grima	

Extended Attributes

Originated	Oct 28, 2015	Modified	Oct 29, 2015
Estimated Start		Estimated Completion	Nov 30, 2015

After a meeting with the Change Control Board, the Change Coordinator can cancel, hold or approve the Change Request

Version	8	Date:	30-April-2016
Status	Template		61

## Change Request finalized

### Step 1 Change Request cancelled



Select icon Cancel from Change Request toolbar

Change Coordinator has to enter a comment; all Change Action connected will be removed

A screenshot of a software dialog box titled "Cancel Change Request". The dialog has a title bar with a refresh icon on the left. Below the title bar is a toolbar with a "Review Affected..." button, a globe icon, and a wrench icon. A red italicized note says "Fields in red italics are required". Below this is a "Warning" section with a text box containing: "This will halt the Change Request's lifecycle and end the change management process for its connected items. Enter a reason and click Done, or click Cancel for the Change Request to continue through its lifecycle." Underneath is a "Reason" section with a text box containing "Change request is superseded". At the bottom right are "Done" and "Cancel" buttons. A vertical scrollbar is visible on the left side of the dialog.

Version	8	Date:	30-April-2016
Status	Template		62

## Step 2 Change Request On Hold



Select icon Hold from Change Request toolbar

Change Coordinator has to enter a comment; all Change Action connected will be On Hold

### Hold Change Request

Review Affected...  

*Fields in red italics are required*

#### Warning

This will halt the Change Request's lifecycle and hold the change management process for its connected items. Enter a reason and click Done, or click Cancel for the Change Request to continue through its lifecycle.

#### *Reason*

Missing information related to customer approval package

Change Request toolbar contains command to resume the request and Change Request owner is notified.

Version	8	Date:	30-April-2016
Status	Template		63



Change Request owner can update request contents, in order to provide missing information; can resume the Change Request in status In Review.

### Step 3 Change Request approved

The route process to approve Change Request is started

	Name	Route Status	Due Date	Description	Owner	State Condition
<input type="checkbox"/>	R-0000158	Finished	Oct 31, 2015		Robert Debono	Evaluate
<input type="checkbox"/>	Route_R-000015...	Started		Review CN Complete	Robert Debono	In Review

Similar to previous process used to upload documents in state Evaluate, users involved are notified.

Each user has to check Change Request content and approve or reject the change.

User has to enter a comment and approve or reject.

**Approval**

*Fields in red italics are required.*

Approval  [IT-0000106](#)

*Comments*

*Action*  Approve  
 Reject  
 Abstain

If one user rejects the task approval, the Change Coordinator is notified and can decide to cancel, hold or update the Change Request.

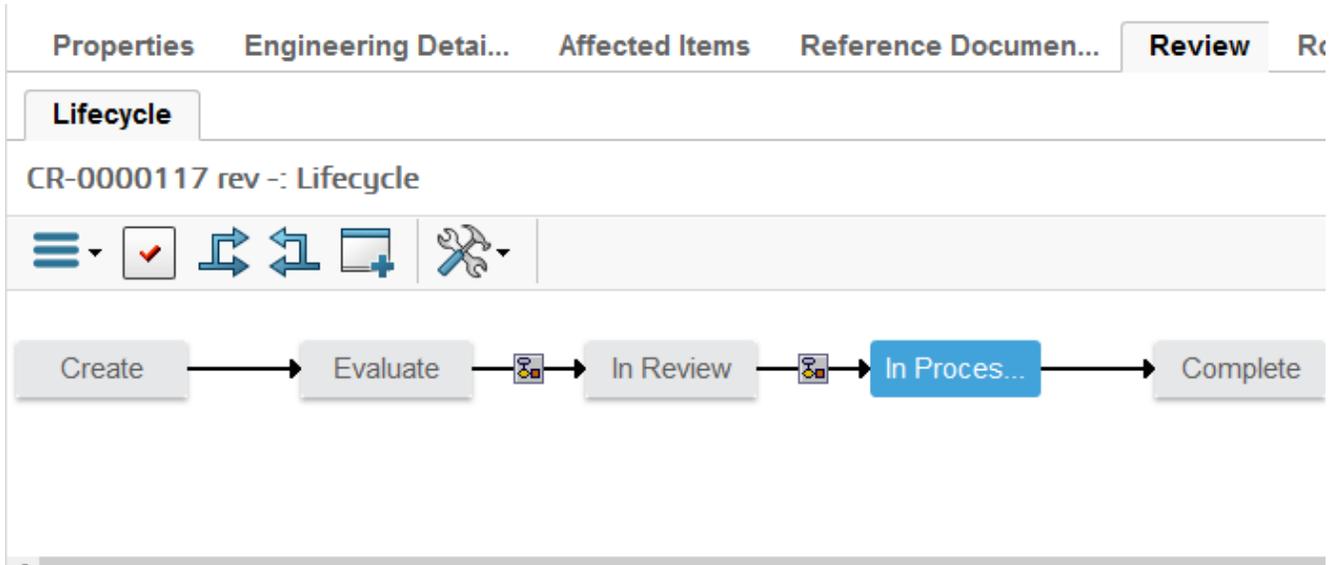
In case of update, Change Coordinator can resume the previous route process or can create a new process.

Version	8	Date:	30-April-2016
Status	Template		64

## Change Order management

### Change Order creation

When all approval tasks are completed, the Change Request is moved to state "In Process"



From Change Request details form, Change Coordinator can search for Change Order connected

The screenshot shows the 'CR-0000002' details form. The left sidebar has sections for Content, Collaboration, and Impact Analysis. The main content area has tabs for Properties, Process Details, and Affected Items. Under 'Properties', there are fields for Duration Alert Days (5) and Connected RFQ. Below this is a 'Reviewers and Approvers' section with an 'Evaluation Reviewers List' containing 'CN approve test' and 'Joseph Zammit'. Under 'Extended Attributes', there are fields for Originated (Apr 9, 2016), Estimated Start, Actual Start (Apr 9, 2016), Responsible Organization (METHODE ELECTRONICS), and Related CO (CO-0032481). The 'Related CO' field is circled in black.

New Change Order is created, in order to implement the change

Version	8	Date:	30-April-2016
Status	Template		65

CO-0000148

Content

Collaboration

Impact Analysis

**Properties** Related Projects Prerequisites Affected Items Change Actions Reference Documen... Review Routes History Images

Basic

Owner Robert Debono

**Change Details and Related Information**

Description Change Index component

Responsible Organization METHODE ELECTRONICS

Reported Against

Related CR [CR-0000117](#)

Category of Change Product Improvement Severity High

Description Change Index component Reason for Change New component

**Reviewers and Approvers**

Formal Approvers List

**Extended Attributes**

Originated Oct 29, 2015 Modified Oct 29, 2015

Distribution List Estimated Completion Nov 30, 2015

Affected Items and Change Actions connect to Change Request are transferred to Change Order.

CO-0000148

Content

Collaboration

Impact Analysis

**Affected Items** Candidate Items Resolved Items >>

Name	Type	Rev	Requested	Change C	State
CA-0000157 (1)					
453052	Part		For Rev...		Releas

**Change Actions**

Name	Type	CA State	CA Eff
CA-0000157	Change Act...	Pending	

Change Order implementation: project definition

Select Related Projects tab

CO-0032461

Content

Collaboration

Impact Analysis

already on ATL3 and ATL 5 to Modified : Apr 9

**Properties** **Related Projects** Prerequisite

Name Current Phase

The toolbar contains three commands:

- Icon Create : allows Change Coordinator to create a new project, in order to implement the change involving other users
- Icon Add Existing : allows Change Coordinator to use an existing project, in order to merge the activities of a previous change (not necessarily related to same part number)

Version	8	Date:	30-April-2016
Status	Template		66

- Icon Disconnect  : allows Change Coordinator to disconnect the change order to the existing project, in order to link another one

Create a new project

Select icon Create; user has to enter a name (Autoname function is provided), Project Date (start date or finish date, depends on field Schedule From) and select template related to Change Notice type

CO-0000132|Create new project from template |



*Fields in red italics are required*

**Project Template**   [Clear](#)

**Questions**

**Name**   AutoName

**Type**   **Project Date**  

**Description**

**Copy Options**  Financial Data  Folders **Resource Template**

**Project Scheduling**

**Schedule From**   **Default Constraint**

**Related Info**

Version	8	Date:	30-April-2016
Status	Template		67

Search Refinement Search Results 1 - 8 of approx. 8 Results | Page Size: 50 (Max Value: 1000)

State: Active

**Taxonomies**

- Types
  - Project Management(8)
  - Project Template(8)

**Attributes**

Name

Originated

Modified

Description

Comment

Name	Current Phase	Type	Status	Owner	Estimated Finish D
<input type="radio"/> APQP - Template	Plan and Defi...	Proj...	Active	Test ...	Nov 20, 2015
<input type="radio"/> Bought-In Tool - Template	Tool manufac...	Proj...	Active	Test ...	Dec 28, 2015
<input checked="" type="radio"/> CN Engineering Template	Administrativ...	Proj...	Active	Test ...	Aug 19, 2015
<input type="radio"/> CN Process Template	Administrativ...	Proj...	Active	Test ...	Aug 17, 2015
<input type="radio"/> CN Supplier Template	Administrativ...	Proj...	Active	Test ...	Aug 17, 2015
<input type="radio"/> PDPLS - Template	PLS PHASE ...	Proj...	Active	Test ...	Nov 16, 2017
<input type="radio"/> PDPLS - Template Splitted	PLS PHASE ...	Proj...	Active	Test ...	Dec 26, 2017
<input type="radio"/> RFQ - Template	Estimation	Proj...	Active	Test ...	Jul 17, 2015

Submit

After project creation, the Change Coordinator has to complete the tasks definition and has to assign tasks to users (or roles) and activate the project

CO-0000136 Improve production for PCB revision State: Prepare In Work Owner: Test Everything Modified: 5/13/2015 5:43:02 PM

Drop images here

Drop files here

CO-0000136

Content

Collaboration

Impact Analysis

Properties Related Projects Prerequisites History Images

Name	Current Phase	Type	Status	Owner	Estimated Finish Date
<input type="checkbox"/> EC-0000136	Administrativ...	Projec...	Create	Test ...	Aug 17, 2015

EC-0000136

Collaboration

Details

Execution

Experiments

Financials

Folders

Objectives

People

Schedule

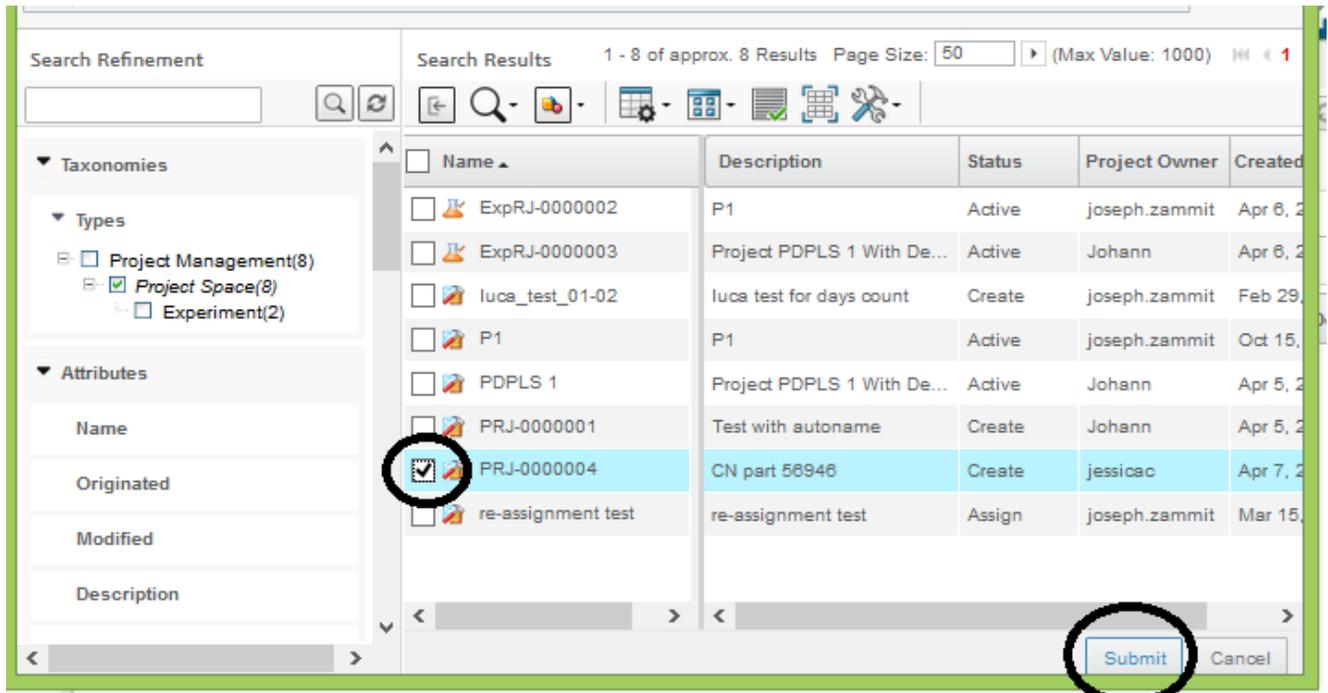
Activities Estima... Gantt Chart Phase Gate View

Name	Type	Id	Dependency	State	%	Progress	Duration	Start Date	End Date
<input type="checkbox"/> EC-0000136	Project S...			Create	0.0	69.0 Days	May 13, 2015	Aug 17, 2015	
<input checked="" type="checkbox"/> Administrative and Coordination Effort	Task	1	0	Create	0.0	1.0 Days	May 13, 2015	May 13, 2015	
<input checked="" type="checkbox"/> Change Notice approval by management	Task	2	0	Create	0.0	0.0 Days	May 13, 2015	May 13, 2015	
<input checked="" type="checkbox"/> Change management effort required to	Task	3	2:FS+1.0 d	Create	0.0	0.0 Days	May 13, 2015	May 13, 2015	
<input checked="" type="checkbox"/> Components/Switches Affected	Task	4	0	Create	0.0	1.0 Days	May 14, 2015	May 15, 2015	
<input checked="" type="checkbox"/> Initial Process Review	Task	5	0	Create	0.0	1.0 Days	May 14, 2015	May 15, 2015	
<input checked="" type="checkbox"/> Review stock coverage	Task	6	3:FS+1.0 d	Create	0.0	0.0 Days	May 14, 2015	May 14, 2015	
<input checked="" type="checkbox"/> SK Drawing to order samples	Task	7	6:FS+1.0 d	Create	0.0	0.0 Days	May 15, 2015	May 15, 2015	
<input checked="" type="checkbox"/> Modular Change Elements	Task	8	0	Create	0.0	67.0 Days	May 13, 2015	Aug 13, 2015	
<input checked="" type="checkbox"/> Change of PBB	Task	9	0	Create	0.0	20.0 Days	May 22, 2015	Jun 19, 2015	
<input checked="" type="checkbox"/> Change in led colour	Task	10	7:FS+5.0 d	Create	0.0	0.0 Days	May 22, 2015	May 22, 2015	

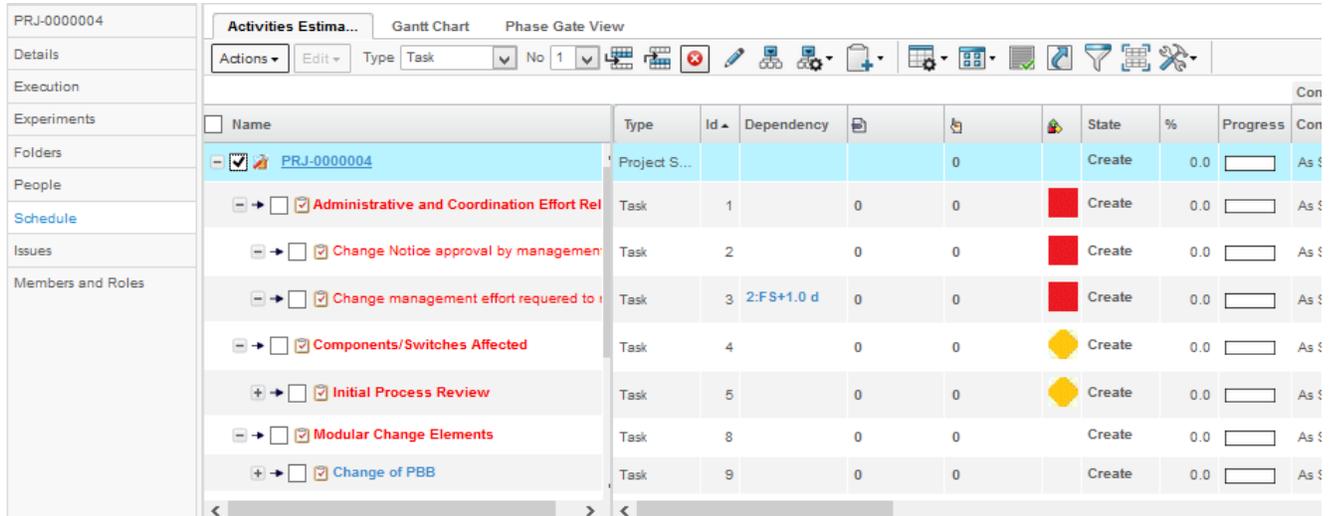
Version	8	Date:	30-April-2016
Status	Template		68

## Add an existing project

Select icon Add Existing; user has to search for an existing project and select command Submit



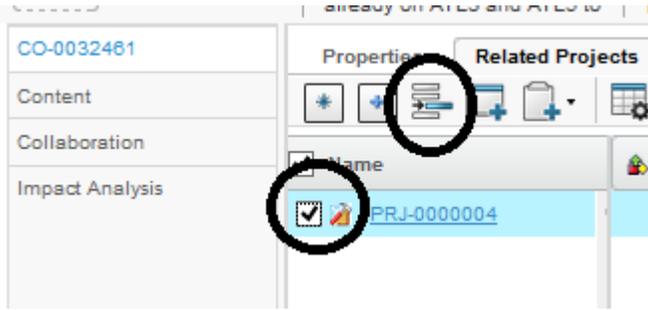
After selecting the project, the Change Coordinator has to update the tasks definition in order to define the activities for new change



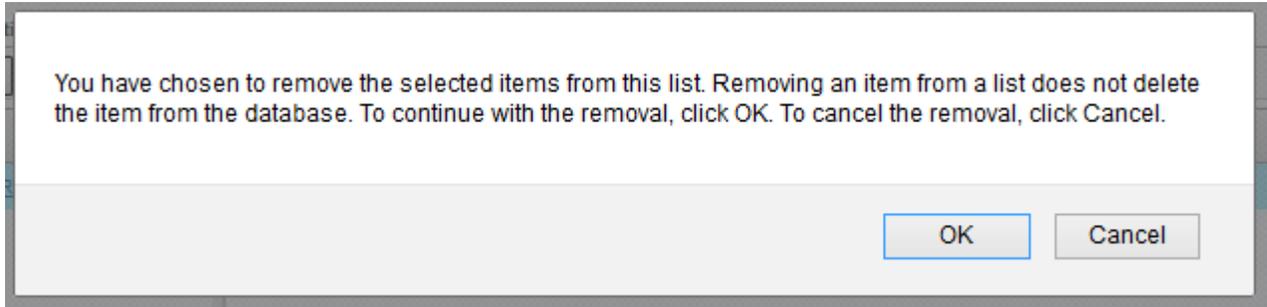
## Disconnect an existing project

Select project to disconnect and select icon Disconnect

Version	8	Date:	30-April-2016
Status	Template		69



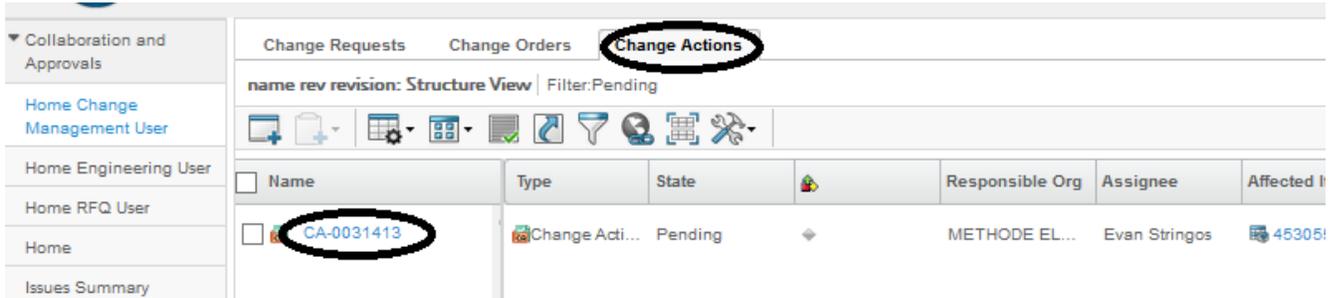
The user has to confirm the disconnect



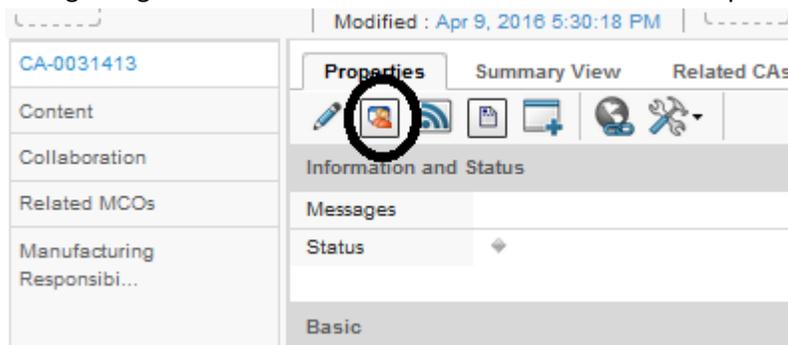
### Change Action transfers to Technical Assignee

When Change Request is approved, the Change Request originator receives a notification; if the Change Request originator has to delegate the new revision management to a Technical Assignee, has to change the ownership of Change Actions.

Change Originator has to select command Change Actions and select Change Action name



Change Originator has to select command Transfer Ownership



Change Originator has to search for Technical Assignee and enter a comment; then select command Done

Version	8	Date:	30-April-2016
Status	Template		70

**Transfer Ownership to Assigne...**

*Fields in red italics are required*

Warning : This operation cannot be reversed except by the new owner.

**New Owner**

Evan Stringos ... [Clear](#)

**Transfer Reason**

Change Assignee

Done [Cancel](#)

The Technical Assignee receives a notification about Change Action ownership

**The new Change Action ha...**

Attachments

**Mail Properties**

[Actions](#) 

From: Matthew Spiteri

To: Evan Stringos

CC:

Subject: The new Change Action has been assigned.

Message: The new Change Action CA-0031413 - has been assigned to you. [Change Action CA-0031413](#) - Transfer Comments: "Change Assignee" [Change Action CA-0031413](#) -

Received: Apr 9, 2016

### Affected Items not revised

The Affected Parts are revised if, during Change Request creation, the Change Originator (or Change Coordinator in state Evaluate) has specified that affected parts have to be indexed (see chapter "Part Affected revision control"). Instead, if Affected Parts have not to be revised (for example, for a Change Request of type Supplier and Process), the Change Action has to be completed.

The process is the following:

Version	8	Date:	30-April-2016
Status	Template		71

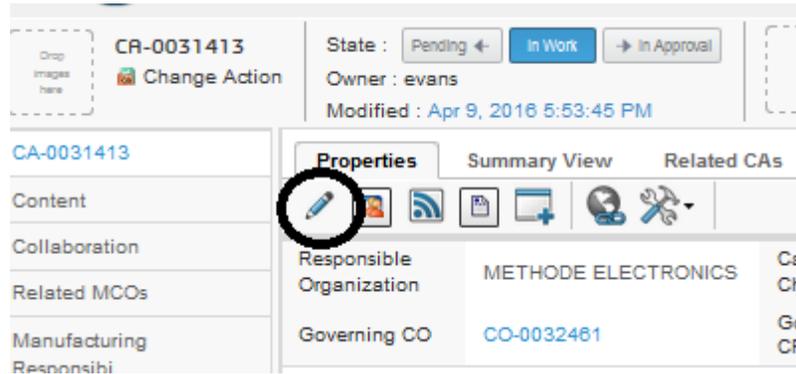
- Technical Assignee has to specify a Senior Technical Assignee and after promote the Change Action to state In Work and to state In Approval
- Senior Technical Assignee has to promote the Change Action to state Complete

### Step 1 Technical Assignee has to specify a Senior Technical Assignee

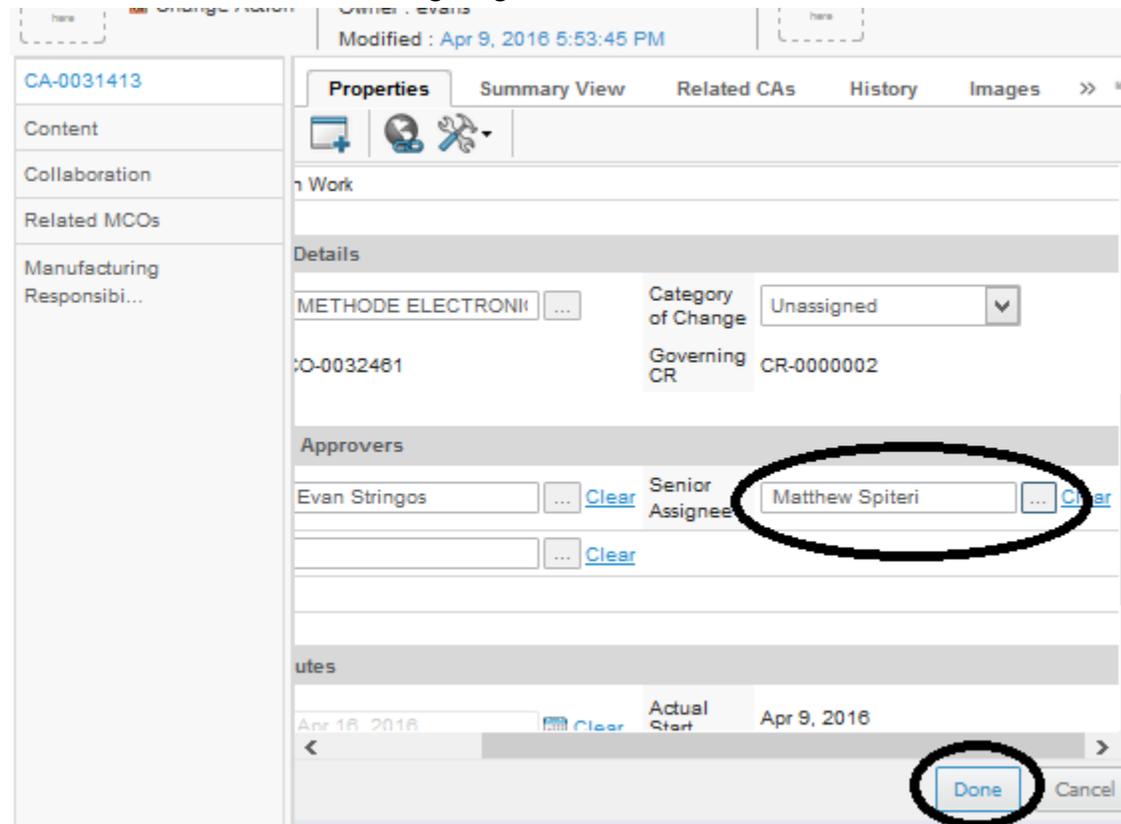
The Change Action owner has to promote the Change Action to state In Approval.

In order to promote the Change Action, the user has to define a Senior Technical Assignee

User has to select icon Edit



User has to search for a Senior Design Engineer and select command Done

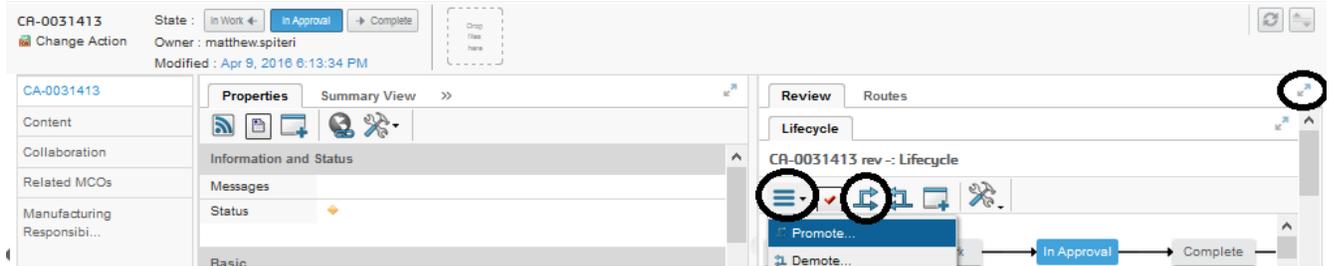


### Step 2 Technical Assignee promotes Change Actions to state In Approval

The Change Action owner has to promote the Change Action to state In Approval.

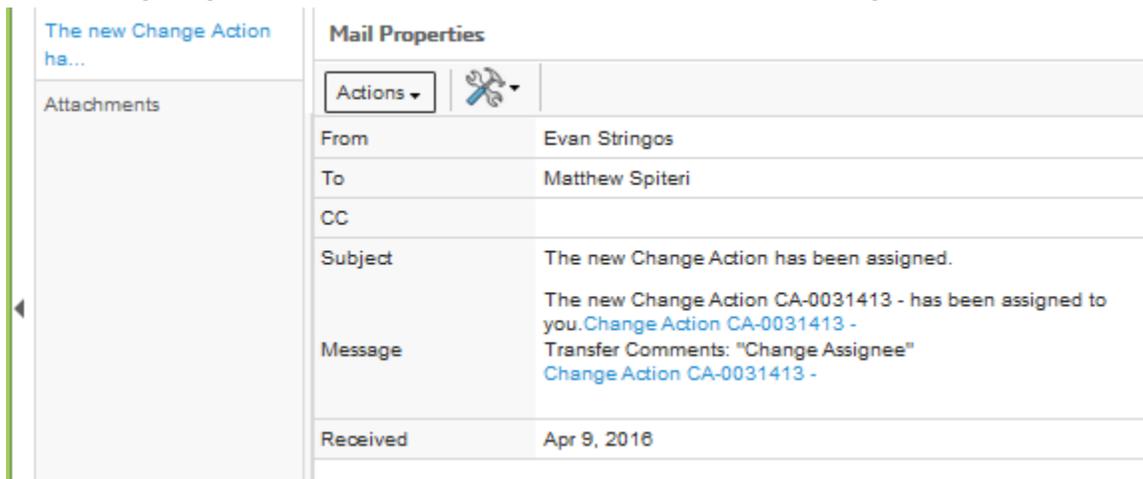
Version	8	Date:	30-April-2016
Status	Template		72

User has to select Change Action, select Lifecycle tab and promote to state In Approval (if necessary, user can enlarge the tab)



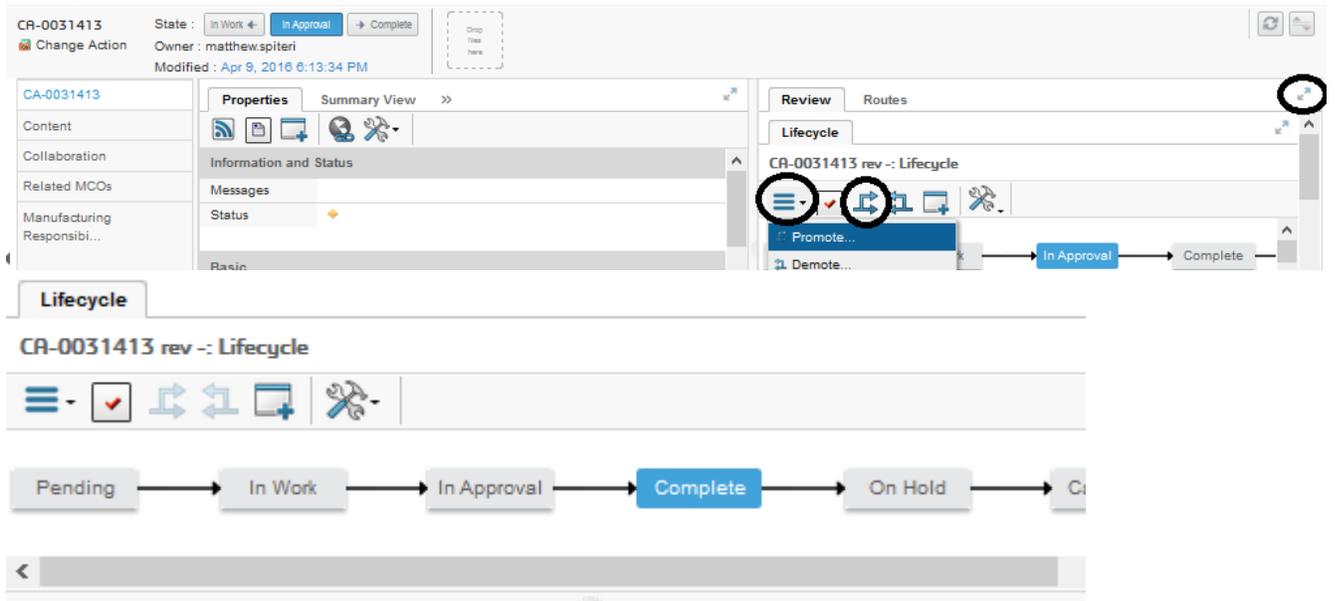
### Step 3 Senior Technical Assignee promotes Change Actions to state Complete

Senior Design Engineer receives a notification and became the new Change Action owner



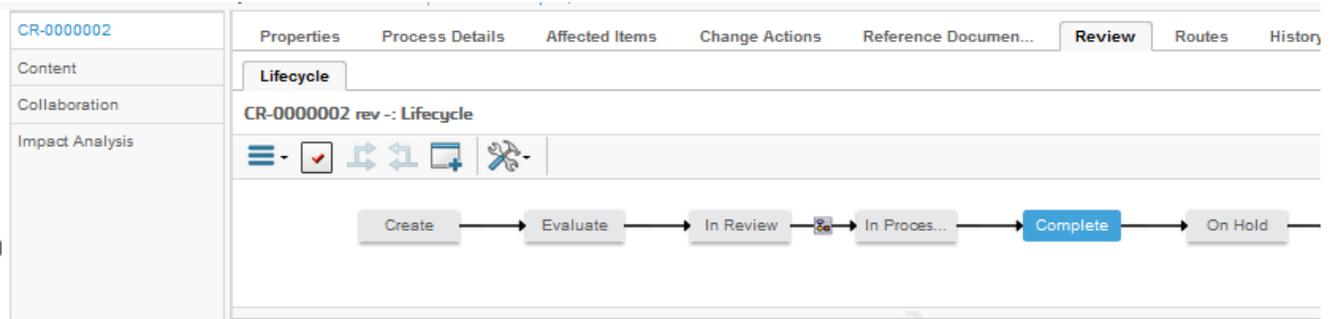
The Change Action owner has to promote the Change Action to state Complete.

User has to select Change Action, select Lifecycle tab and promote to state In Approval (if necessary, user can enlarge the tab)

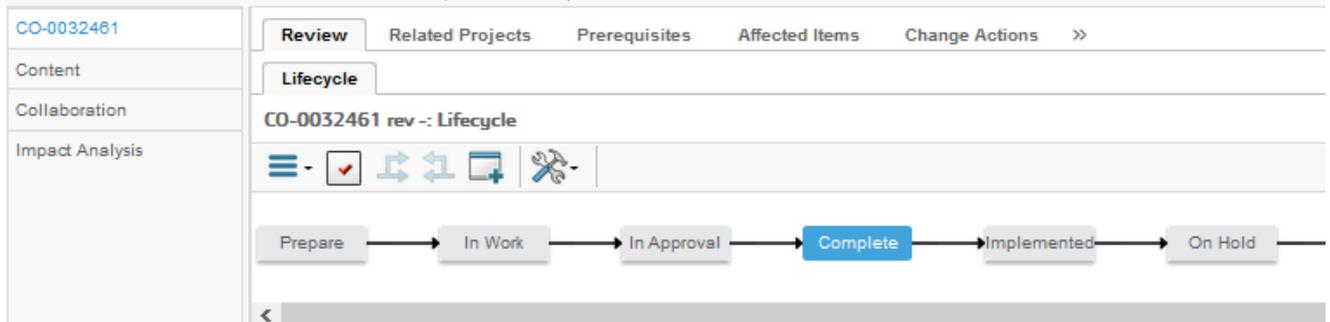


Version	8	Date:	30-April-2016
Status	Template		73

When Change Action state is state Complete, the Change Request state is Complete



The Change Order state is Complete



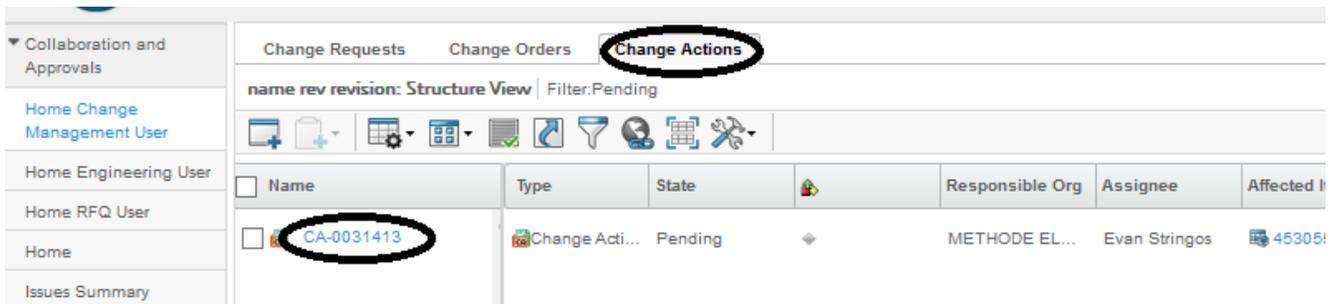
### Affected Items revised

If Affected Parts have to be revised, the process is the following:

- Technical Assignee has to promote the Change Action to state In Work
- Technical Assignee has to complete part revision with drawings and EBOM
- Senior Design Engineer has to approve the affected parts
- MBOM Engineer has to release the affected parts
- MBOM Engineer has to update and release the MBOM
- Change Coordinator has to update Change Notices

### Step 1 Technical assignee has to promote the Change Action to state In Work

In order to create the new revision for affected parts, Change Action owner has to select Change Actions tab and select the Change Action link, related to Change Request approved



Promoting the Change Action to state "In Work" (before promoting the Change Action, the user has to enter the estimated completion date), the Affected Items are revised

Version	8	Date:	30-April-2016
Status	Template		74

CA-0000242 State: Pending → In Work  
 Owner: matthew.spiteri  
 Modified: 12/14/2015 4:59:58 PM

CA-0000242

Content  
 Collaboration  
 Impact Analysis  
 Related MCOs  
 Related Planning Change  
 Manufacturing Responsibi...

Properties Summary View Related CAs History

Information and Status  
 Messages  
 Status

Basic  
 Name CA-0000242 Type Change Action  
 Policy Change Action Owner Matthew Spiteri  
 Description  
 State Pending

Review Routes  
 Lifecycle  
 CA-0000242 rev -: Lifecycle  
 Pending → In Work → In Approval → Complete

Tasks/Signatures Approvals

Review Routes

Lifecycle

CA-0000113 rev -: Lifecycle

Pending → In Work → In Approval → Complete → On Hold → Cancel

CA-0000242 State: Pending → In Work  
 Owner: matthew.spiteri  
 Modified: 12/14/2015 4:59:58 PM

CA-0000242

Content  
 Collaboration  
 Impact Analysis  
 Related MCOs  
 Related Planning Change  
 Manufacturing Responsibi...

Affected Items **Implemented Items** Related Items Reference Documen... Markups

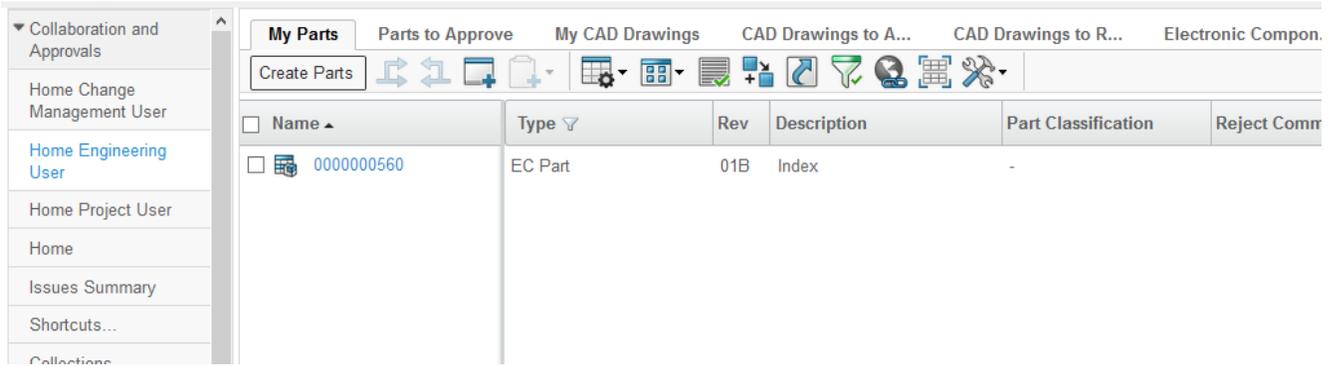
Add Existing

Name	Revision	Type	State	Description
0000000560	01	Part	Preliminary	Index

Step 2 Technical assignee has to complete new revision information and design (attribute details, new drawings, new documents) and promote Implemented Items to status Review

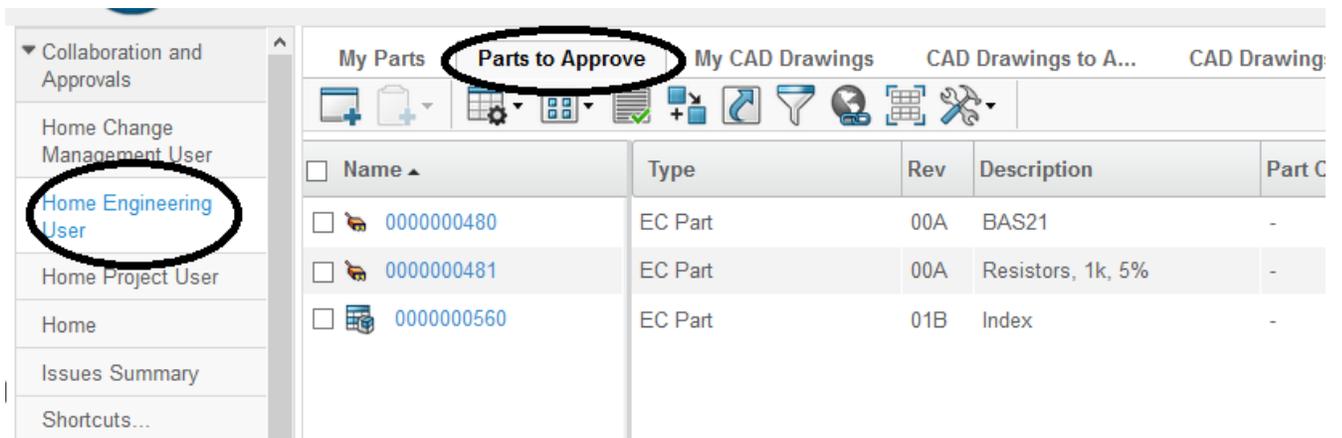
The new revision is managed like the other part numbers, using the commands contained in Engineering Menu page (see document "Engineering Training")

Version	8	Date:	30-April-2016
Status	Template		75



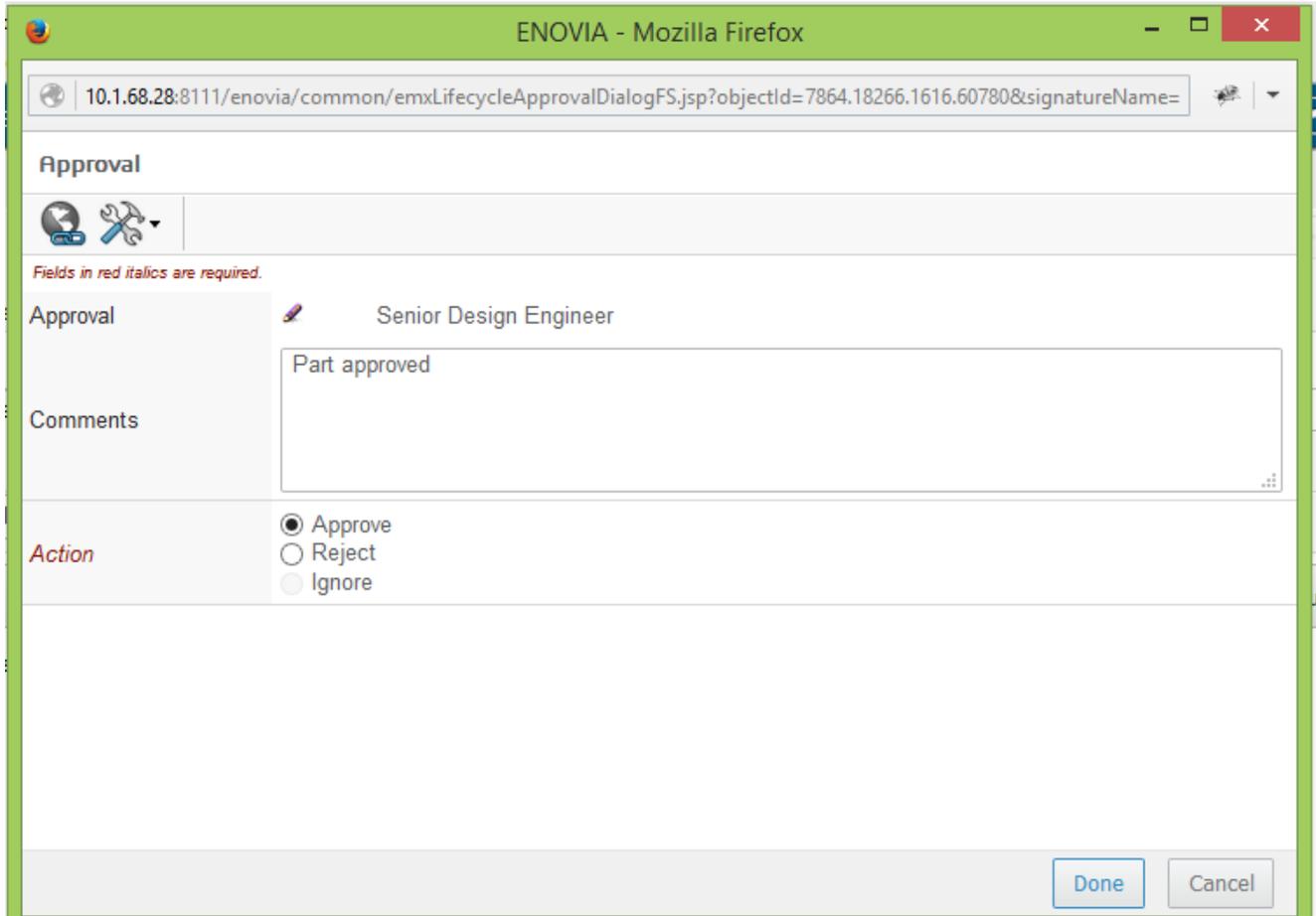
### Step 3 Senior Design Engineer has to approve revised parts

From Parts to Approve table, select part to approve (see document “Engineering Training”)



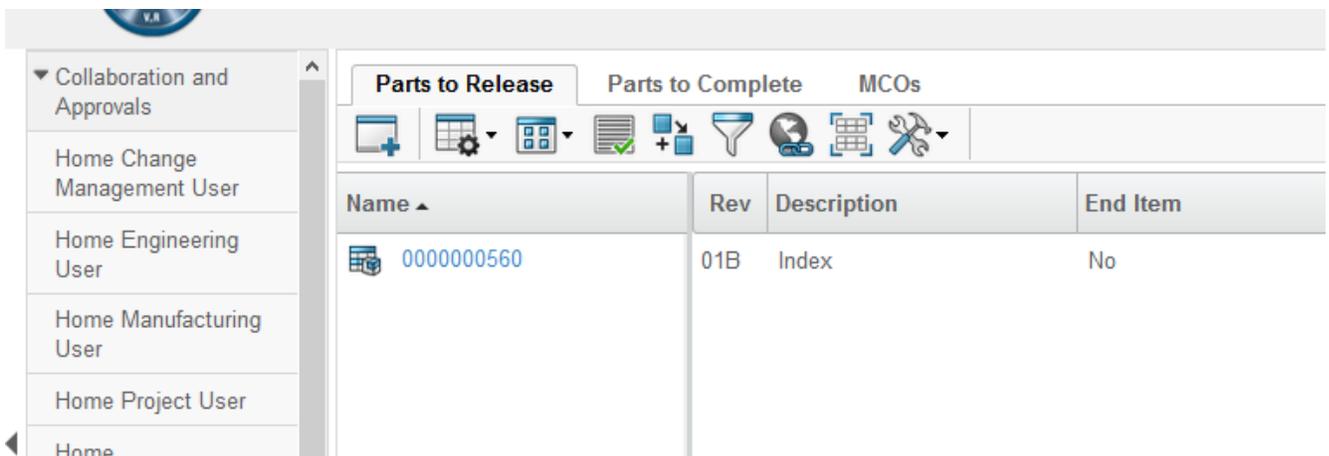
From Lifecycle tab, select signature and approve new revision. If part is rejected, the Senior Design Engineer has to demote the part to state Preliminary and the part owner is notified in order to address the rejection.

Version	8	Date:	30-April-2016
Status	Template		76



#### Step 4 MBOM Engineer has to release revised parts

From Parts to Release table, select part to release (see document "MBOM Engineering Training")



Promote the part to state Release

Version	8	Date:	30-April-2016
Status	Template		77

0000000560 Part (01B)

State : Review ← **Approved** → Released

Owner : matthew.spiteri  
Modified : 12/14/2015 5:31:25 PM

EBOM EBOM Common MBOM Plant Specif... Routing Where Used Markups

Reports

Name	Type	State	Rev	F/N	Qty	U of M	Des
0000000560	EC Part	Approved	01B			PCS - PI...	Inde

If the part has Manufacturing Responsibility, an automatic process creates a MCO for each manufacturing Plant.

**Notice:**

MBOM will be generated as background process and Responsible Manufacturing Engineer of the associated change object will be notified once the job is completed.

OK

MBOM Engineer can update MBOM and Routing definition, using the dedicate commands contained in Bill Of Materials tab.

When Affected Parts is released, the Change Request state is Complete

CR-0000001

Properties Engineering Detai... Affected Items Change Actions Reference Documen... **Review** Routes History Ima

Lifecycle

CR-0000001 rev -: Lifecycle

Create → Evaluate → In Review → In Proce... → **Complete**

The Change Order state is Complete

CO-0029528

Properties Related Projects Prerequisites Affected Items Change Actions Reference Documen... **Review** Ro

Lifecycle

CO-0029528 rev -: Lifecycle

Prepare → In Work → In Approval → **Complete** → Impleme

Version	8	Date:	30-April-2016
Status	Template		78

Step 5 MBOM Engineer has to update Manufacturing Change Order

MBOM Engineer has to update and approve MCO, in order to push new revision to CMS with Start Effectivity Date (see document “MBOM Engineering Training”).

Parts to Release		Parts to Complete		MCOs	
name rev revision: Structure View   Filter:Active					
<input type="checkbox"/> Name	responsibility	Affected Items	State	D	
<input type="checkbox"/> MCO-000074			Create		
<input type="checkbox"/> MCO-000076		0000000576	Create		
<input type="checkbox"/> MCO-000080		0000000415 0000000586 0000000587	Create		
<input type="checkbox"/> MCO-000081		0000000414 0000000416	Create		
<input type="checkbox"/> MCO-000082		0000000560	Create		
<input type="checkbox"/> MCO-000083		0000000560	Create		
<input type="checkbox"/> MCO-1450000			Create		

Select MCO related to revised part

Version	8	Date:	30-April-2016
Status	Template		79

<div style="border: 1px dashed gray; padding: 5px; width: fit-content;">Drop Images here</div>	<b>MCO-0000082</b>  MCO	State : <span style="background-color: #0070C0; color: white; padding: 2px 5px;">Create</span> <span style="border: 1px solid gray; padding: 2px 5px;">→ Review</span>
		Owner : User Agent Modified : 12/14/2015 5:35:14 PM
<a href="#">MCO-0000082</a>	  	
History	Type	MCO
Lifecycle	Name	MCO-0000082
Affected Part Revisions	Description	
Route	Policy	MCO Standard
MCO Impact Report	Start Date	Dec 31, 2049 1:00:00 AM EET
Related MCOs	Target Start Date	
Related Change	Originator	User Agent
	Manufacturing Responsibility	<a href="#">Egypt</a>
	Manufacturing Responsibility Timezone	(GMT+02:00) Cairo
	Distribution List	

MBOM Engineer has to enter Start Effectivity Date, select a Route Template as Approval List for approval process and a Distribution List for notification, select Responsible Manufacturing Engineer and Senior Responsible Manufacturing Engineer that will be notified when MCO is promoted to state Review. The field Start Effectivity Date is mandatory (default date “Dec 31, 2049” has to be changed), all other fields are optional.

Information like Start Effectivity Date can be updated several times; when information is complete and MBOM and Routing are completed, MBOM Engineer has to promote MCO to state Review.

If Approval List is not provided, MBOM Engineer can also promote MCO to state Released and Implemented (means the Start Effectivity Date is no more editable).

If Approval List is provided, like for other approval process, people involved receive a notification in order to approve MCO.

Version	8	Date:	30-April-2016
Status	Template		80

MCO-0000082 rev : Lifecycle

Create → Review → Released → Implemented

Tasks/Signatures Approvals

Show: All Approvals Approval Status: All Filter

Name	Approver	Title	Approval Status	Approval/Due Date	Comments/Instr
IT-0000225	Alexander Galea	Approve MBOM	Awaiting Approval	Dec 15, 2015	Approve MBOM
IT-0000226	Johann Barbara	Approve MBOM	Awaiting Approval	Dec 15, 2015	Approve MBOM
IT-0000227	Michael Mizzi	Approve MBOM	Awaiting Approval	Dec 15, 2015	Approve MBOM

When all users involved have completed the approval task, the MCO is automatically promoted to state Released; the MBOM Engineer that has promoted the MCO from state Create to state Review receives a notification in order to promote the MCO to state Implemented.

If a user involved in approval process doesn't approve the MCO, the MBOM Engineer that has promoted the MCO from state Create to state Review receives a notification, can decide to modify Routing, MBOM and Start Effectivity Date and restart a new Route process.

### Step 6 Change Coordinator has to update Change Notices

Change Coordinator has to update Change Notices, in order to push new Start Effectivity Date to CMS (see chapter "Change Notices Management").

Select command Change Notices in Home Change Management User; select icon Edit in order to update Start Effectivity Date

Change Requests Change Orders Change Actions CMS Change Notici...

name rev revision: Structure View | Filter:Active

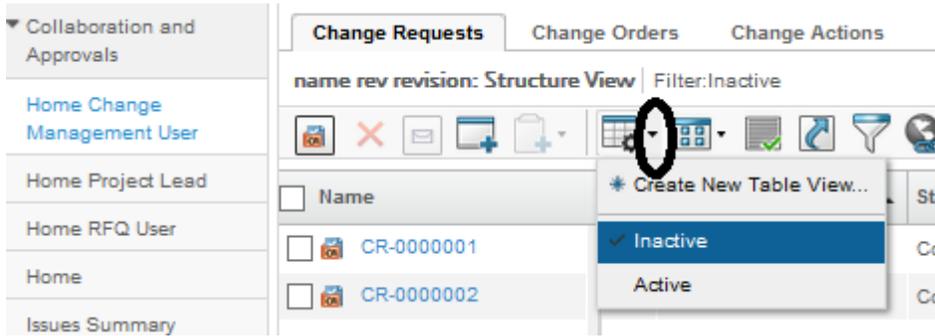
Name	Related Part	Related MCO	Related CA	Related CR	Start Date	Cur
CN0000001	750143-44	MCO-0017317	CA-0028480	CR-0000001	Apr 10, 2016	Cre

### Change Order closed

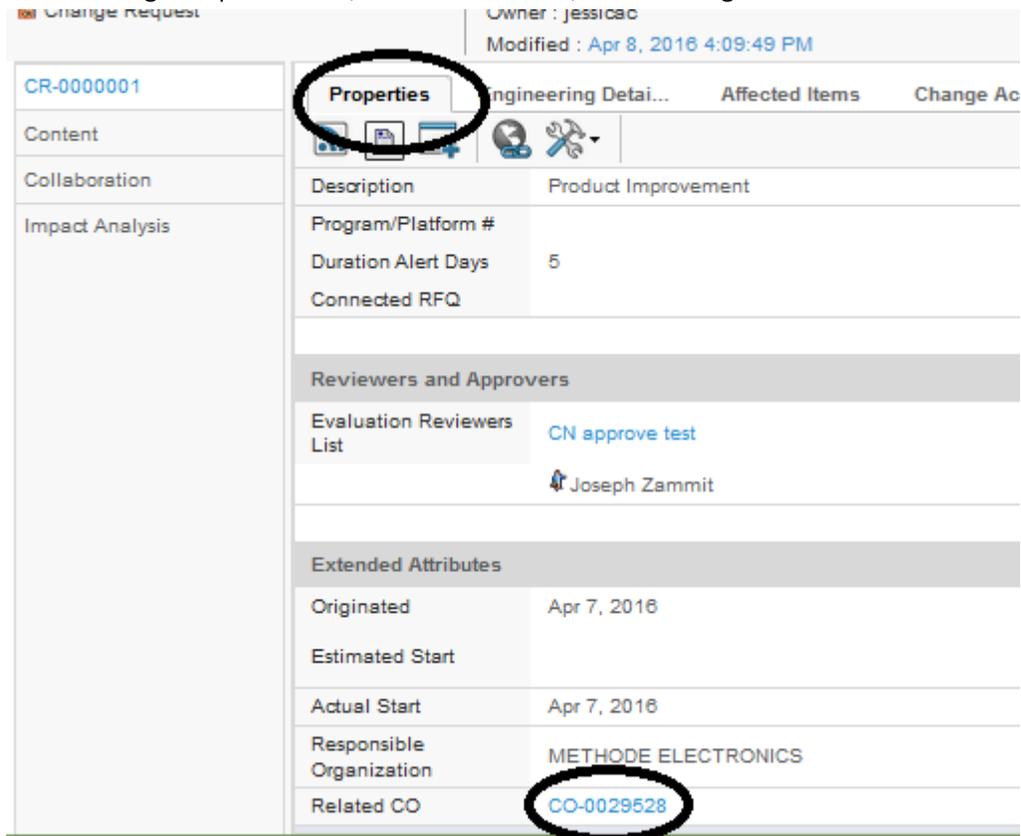
The Change Order has to be closed manually, when project linked to Change Order is completed.

Select command Change Request in Home Change Management User; select filter Inactive and select Change Request related to Change Order to close

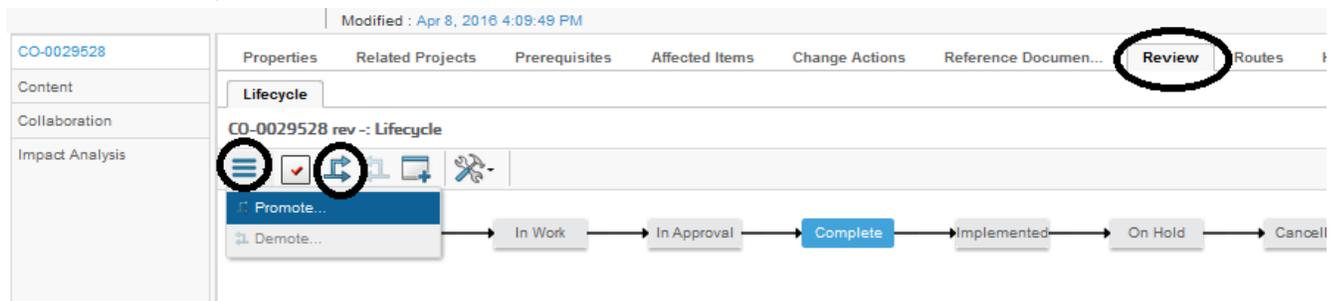
Version	8	Date:	30-April-2016
Status	Template		81



Select Change Request name; from form details, select Change Order name



Select tab Review; select icon Promote or command Promote contained in menu Actions



Version	8	Date:	30-April-2016
Status	Template		82

## EC03 MBOM Massive Change

<b>Purpose</b>	Replace or remove a part from MBOMs	<b>Status</b>	Define
<b>Stakeholders</b>	Design Engineering and MBOM Engineer		
<b>Beginning</b>	Design Engineering searches for a part to substitute in EBOMs and MBOMs		
<b>Interactions</b>	Design Engineering has to search for source part, select Where Used in Bill Of Material command, select EBOMs to modify and select new Substitute part.		
<b>End</b>	MCOs are created for each Manufacturing Plant related to parts involved.		
<b>Constraints</b>	None		

### Change Request creation with BOM Markups

Design Engineer has to create a Change Request with Affected Parts that contain part to be replaced

#### Step 1 Search for part to be replaced, select command Where Used

The screenshot shows the SAP software interface for a part (000000022). The 'Where Used' command is highlighted in the 'Actions' menu. The main table displays the following data:

Name	Levels	F/N	Ref Des	Qty	Part Mode	Related ECR	Revision	Type	State	Description	Rel
0000000049	-1	60		1.0	Un-configu...		00D	Part	Rele...	test	EBOM
0000000052	-1	30		1.0	Un-configu...		00B	Part	Preli...	NewSwitch white	EBOM
0000000179	-1	30		1.0	Un-configu...		00B	Part	Rele...		EBOM
0000000011	-1	60		1.0	Un-configu...		00B	Part	Rele...	M1/M2 = HDSCS = Base ...	EBOM
0000000050	-1	60		1.0	Un-configu...		00D	Part	Preli...	test	EBOM

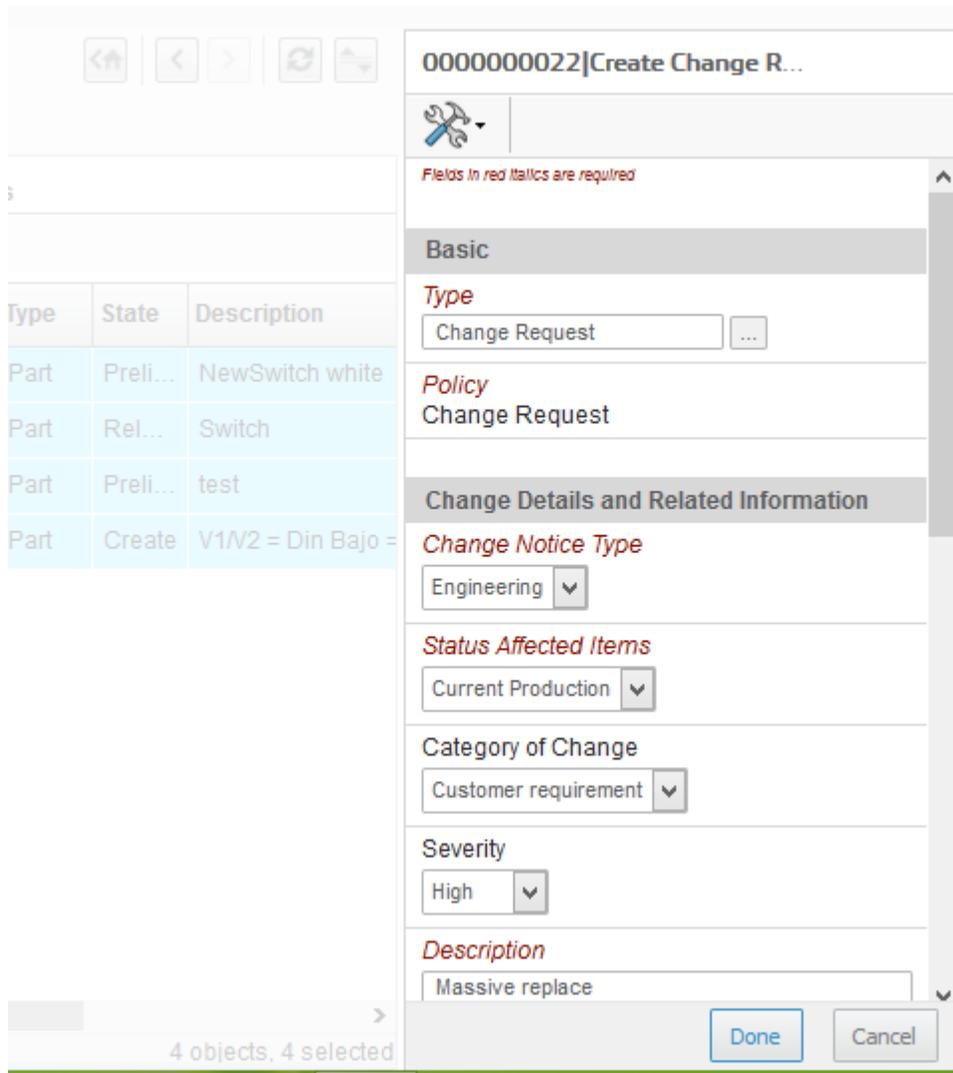
#### Step 2 Select parts where perform the change and select command to create a new Change Request

The screenshot shows the SAP software interface for a part (000000022). The 'New Change Request' command is selected in the 'Change' menu. The main table displays the following data:

Name	F/N	Ref Des
0000000052	30	
0000000632	2	
0000000050	60	
0000000019	60	

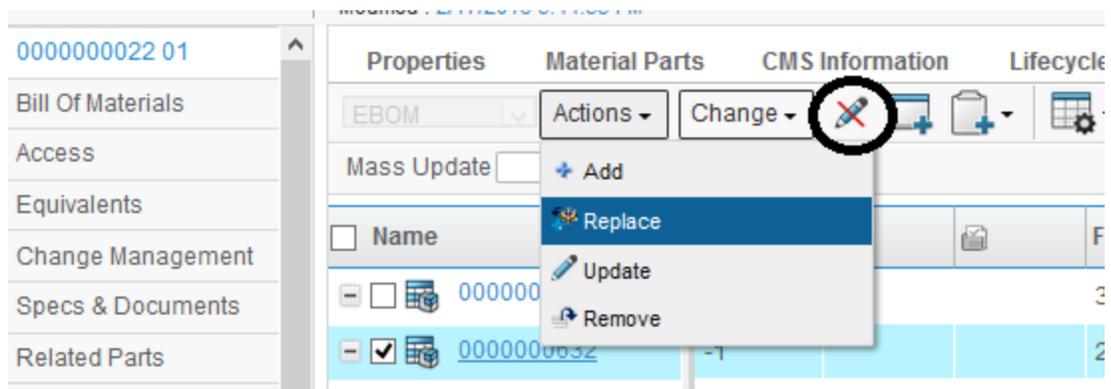
User has to enter information related to new Change Request (see previous use case); select command Done when complete

Version	8	Date:	30-April-2016
Status	Template		83



**Step 3** Select command Replace and search for substitute part

In order to define part to be used to replace part used at beginning, select command Edit and command Replace



Using a query function, select new part; select command Submit

Version	8	Date:	30-April-2016
Status	Template		84

Search Refinement Search Results Results: 1, 1 selected

Search        

Case Sensitive

Limit to  results

Type

Name

Revision   Highest  By State

Description

Policy

State

Originated

Name	Policy	Rev	Type	Description	State
 0000000487	EC Part	00	Part	Index	Released



The system shows the proposed change

000000022 01

- Bill of Materials
- Access
- Equivalent
- Change Management
- Specs & Documents
- Related Parts
- Collaboration
- Multiple Ownership Access
- Manufacturing Details
- Vendor Part Numbers

Properties Material Parts CMS Information

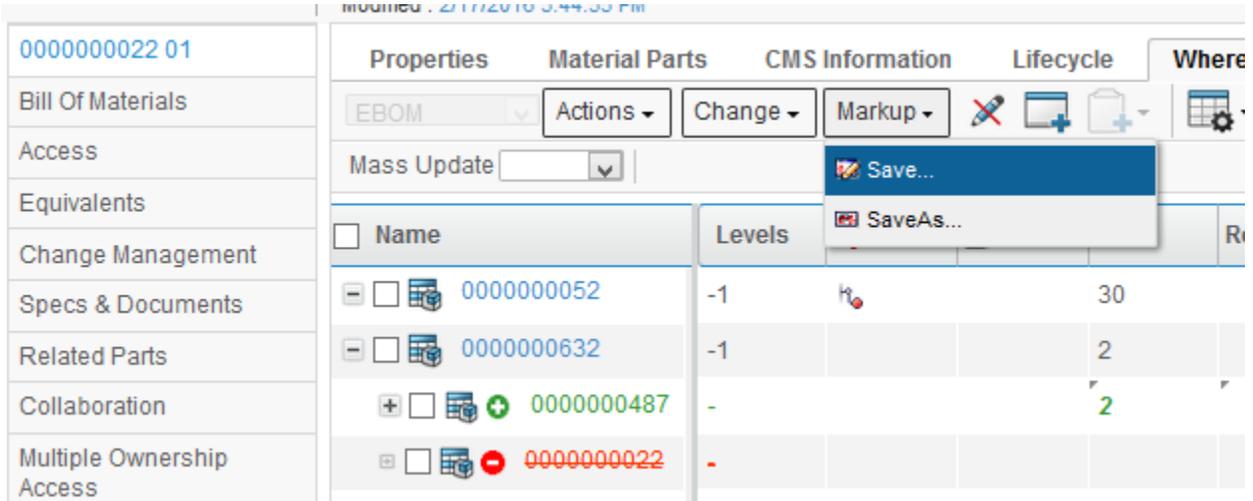
EBOM  Actions  Change   

Mass Update

<input type="checkbox"/>	Name	Levels	
<input type="checkbox"/>	 000000052	-1	
<input type="checkbox"/>	 000000632	-1	
<input type="checkbox"/>	  0000000487	-	
<input type="checkbox"/>	  000000022	-	
<input type="checkbox"/>	 000000050	-1	
<input type="checkbox"/>	 000000019	-1	

Version	8	Date:	30-April-2016
Status	Template		85

Step 4 Save the BOM Markup: select command Save in Markup menu



The system will create a new Markup; user has to select the Change Request created previously; select the icon “...” to search for Change Request

Version	8	Date:	30-April-2016
Status	Template		86

**Create Markup**

Fields in red Italics are required

*Change*

... Clear

Description

Reset

Description

.. NewSwitch white

Switch

Index

*Indexing*

.. test

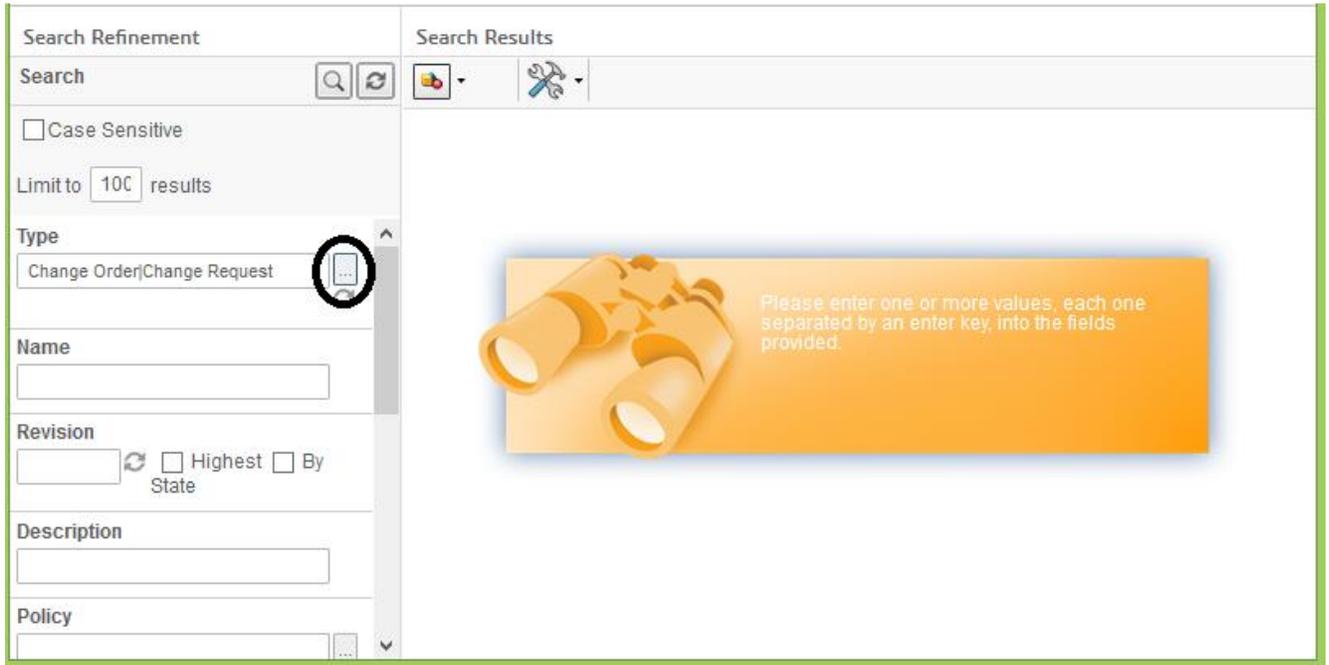
te V1/V2 = Din Bajo =

6 objects

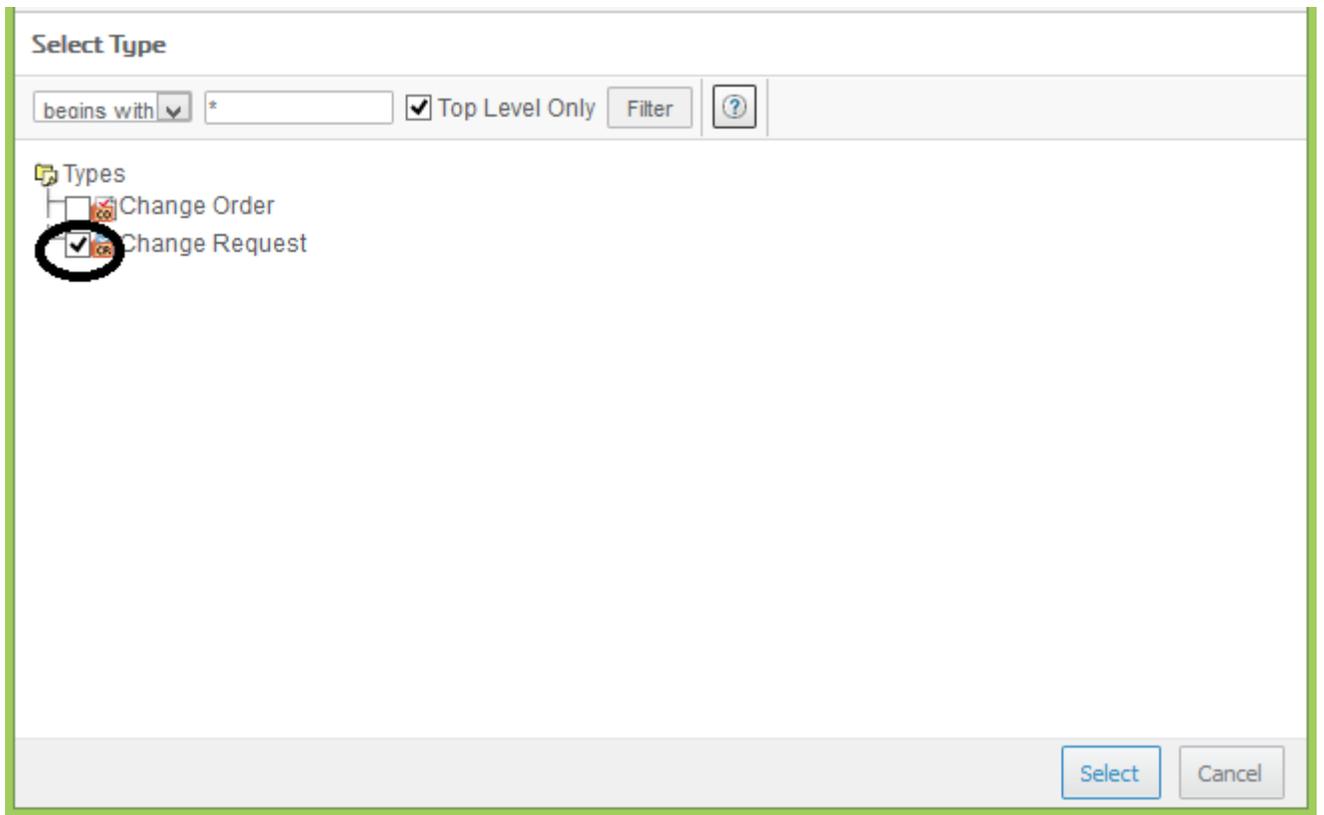
Done Cancel

User can select type selector in order to search only Change Request

Version	8	Date:	30-April-2016
Status	Template		87



Select type Change Request and select command Select



User has to search for previous Change Request created selecting the query button; can search by Description or search for the last CR created sorting the list (select the header of column Name). Select the CR code and select command Submit.

Version	8	Date:	30-April-2016
Status	Template		88

Search Refinement Search Results Results: 15, 1 selected

Search

Case Sensitive

Limit to  results

Type

Name

Revision  
   Highest  By State

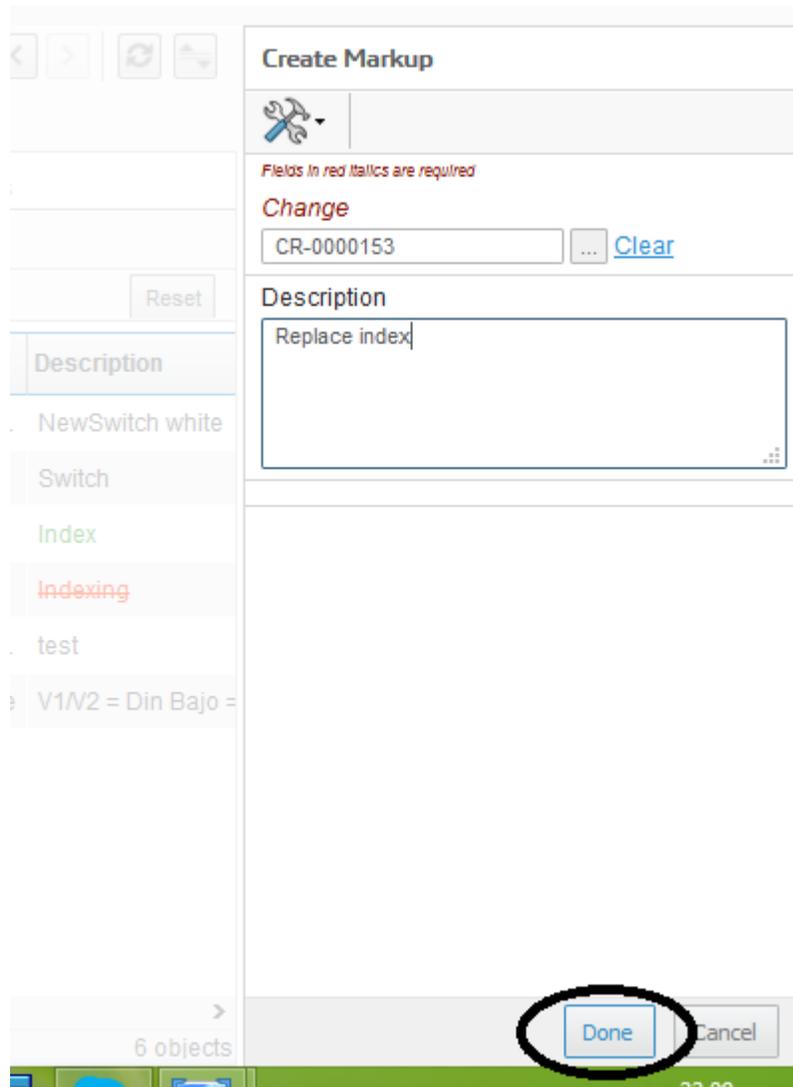
Description

Policy

Name	Rev	Type	Description	State
<input checked="" type="radio"/> CR-0000153	-	Change R...	Replace component with...	Create
<input type="radio"/> CR-0000151	-	Change R...	lknadlknlkjdnfs	Evaluate
<input type="radio"/> CR-0000150	-	Change R...	Changing the material of...	Create
<input type="radio"/> CR-0000149	-	Change R...	Modification to housing t...	Evaluate
<input type="radio"/> CR-0000147	-	Change R...	Change for impor	Create
<input type="radio"/> CR-0000146	-	Change R...	7th January test	Evaluate
<input type="radio"/> CR-0000145	-	Change R...	Matthew Spiteri's Change !	Evaluate
<input type="radio"/> CR-0000144	-	Change R...	test 4 incomplete CR su...	Create
<input type="radio"/> CR-0000143	-	Change R...	test4	Create
<input type="radio"/> CR-0000142	-	Change R...	test	Create

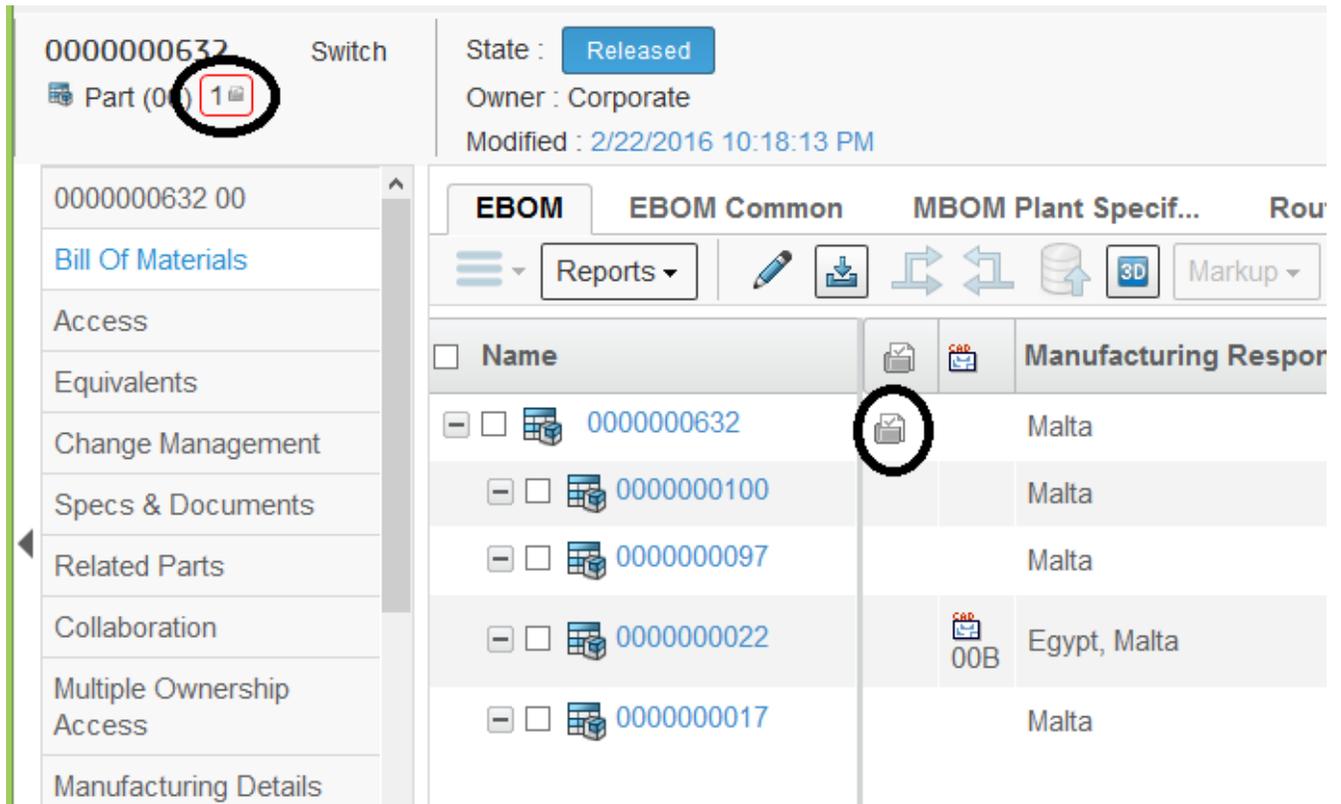
User has to complete Markup with a description; select command Done when completed

Version	8	Date:	30-April-2016
Status	Template		89



The part involved in Change Request has an alert in header to notify there is an active change; also table Bill Of Material shows a similar icon

Version	8	Date:	30-April-2016
Status	Template		90



## Change Request approval

Change Request has to be approved; users involved can see contents of requested change.

About Change Request process, see chapter "Change Management"; a brief description follows.

Change Request originator has to define the default Change Coordinator and Technical Assignee for Change Action; Change Coordinator has to define an Estimated Completion, define the Core Team member and start route process to provide information.

When Core Team members add information related to costs and impacts, Change Coordinator can move the Change Request to approval process.

People involved as Core Team member or as approver, can see the requested modification using the command Markup contained in Bill Of Material tab.

Version	8	Date:	30-April-2016
Status	Template		91



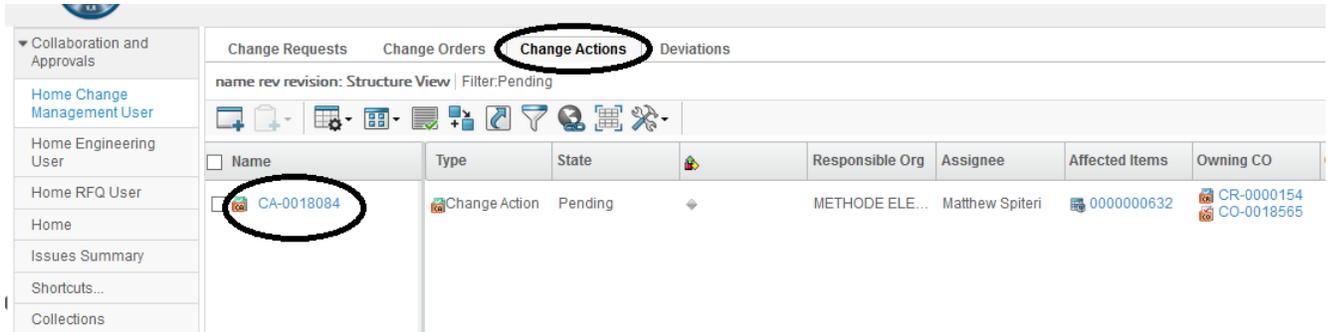
## Apply change using BOM Markups

Change request is approved; Design Engineer can apply the requested change.

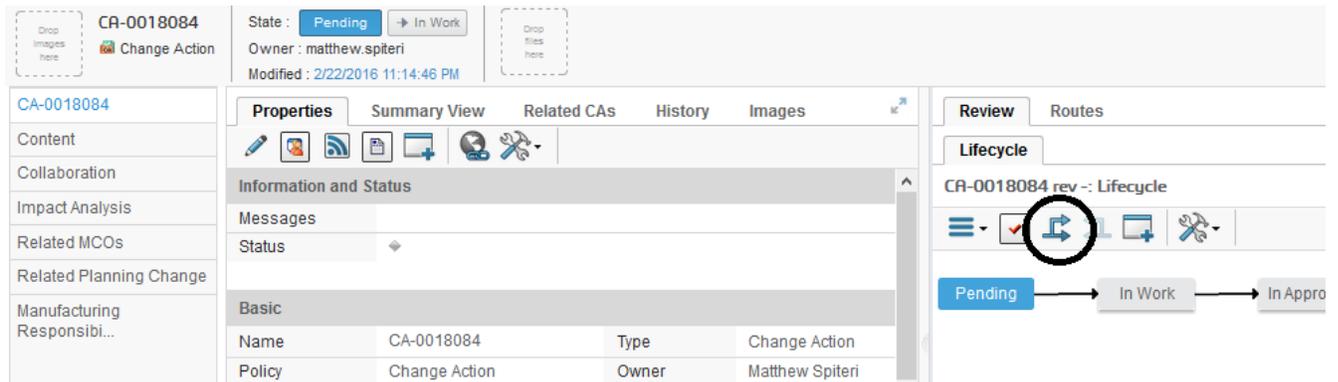
About Change Order process, see chapter “Change Management”; a brief description follows.

When Change Request is approved, a Change Order is created and Change Action owner receives a notification; the user can promote the Change Action in order to create the new revision of Affected.

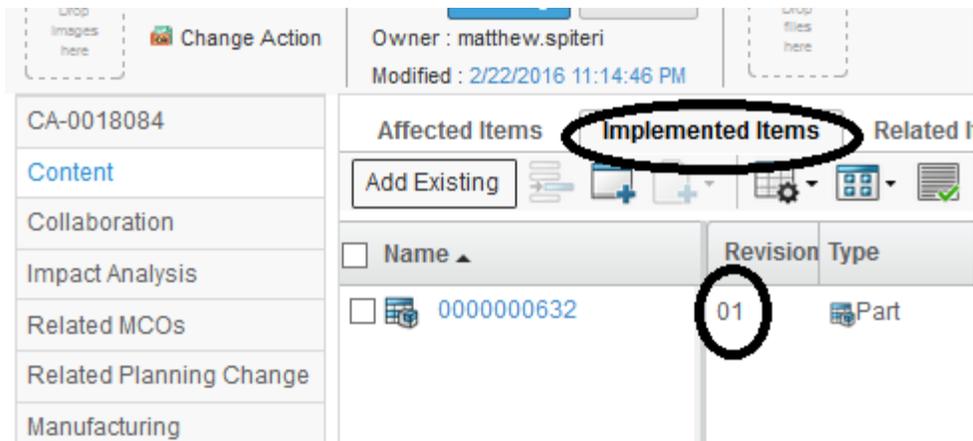
Select command Change Actions from Home Change Management User; select link to Change Action



From Change Action form, select icon Promote



The system creates the new revision



Version	8	Date:	30-April-2016
Status	Template		93

### Step 1 From Change Request or from Change Order, select Change Action

Change Request | Owner: joe.budgeja | Modified: Feb 22, 2016 11:51:26 PM

CR-0000154

Properties | Engineering Detail... | Affected Items | **Change Actions** | Reference Documen... | Review | Routes

Name	Type	CA State	Governing CO	CA Effectivity	Assignee
CA-0018084	Change Ac...	Comp...	CO-001856		Matthew Spiteri

### Step 2 Select content tab, select Markup tab

Change Action | Owner: matthew.spiteri | Modified: 2/22/2016 11:14:46 PM

CA-0018084

Affected Items | Implemented Items | Related Items | Reference Documen... | **Markups**

Markup Actions

Name	Type	Description	Status	Created
MK-0000118	BOM Markup	Replace index	Proposed	2/22/2016

### Step 3 Select Markup objects, from Markup Action menu select commands Approve and Apply

Modified: 2/22/2016 11:14:46 PM

CA-0018084

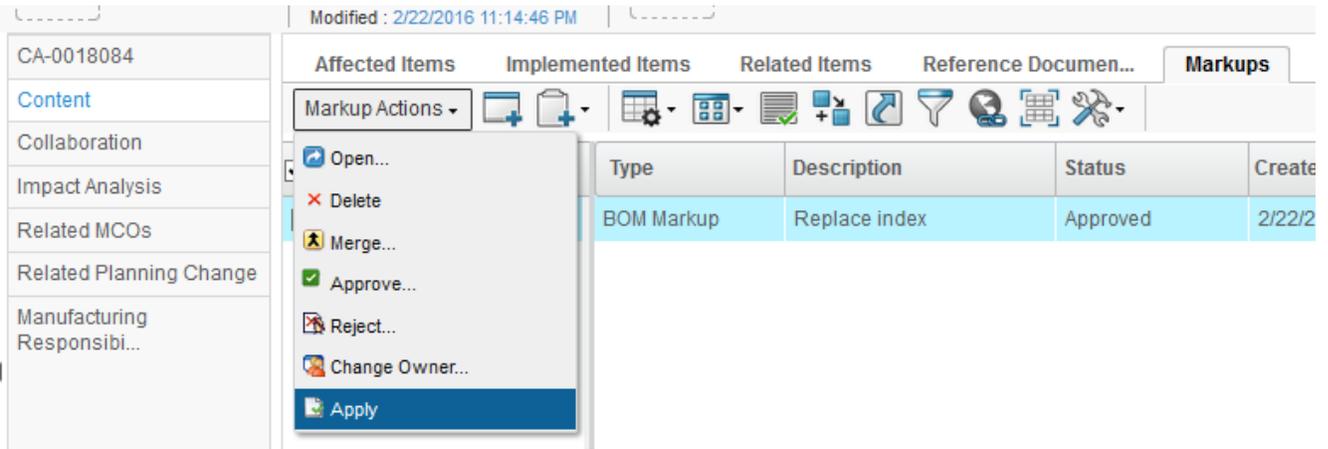
Affected Items | Implemented Items | Related Items | Reference Documen... | **Markups**

Markup Actions

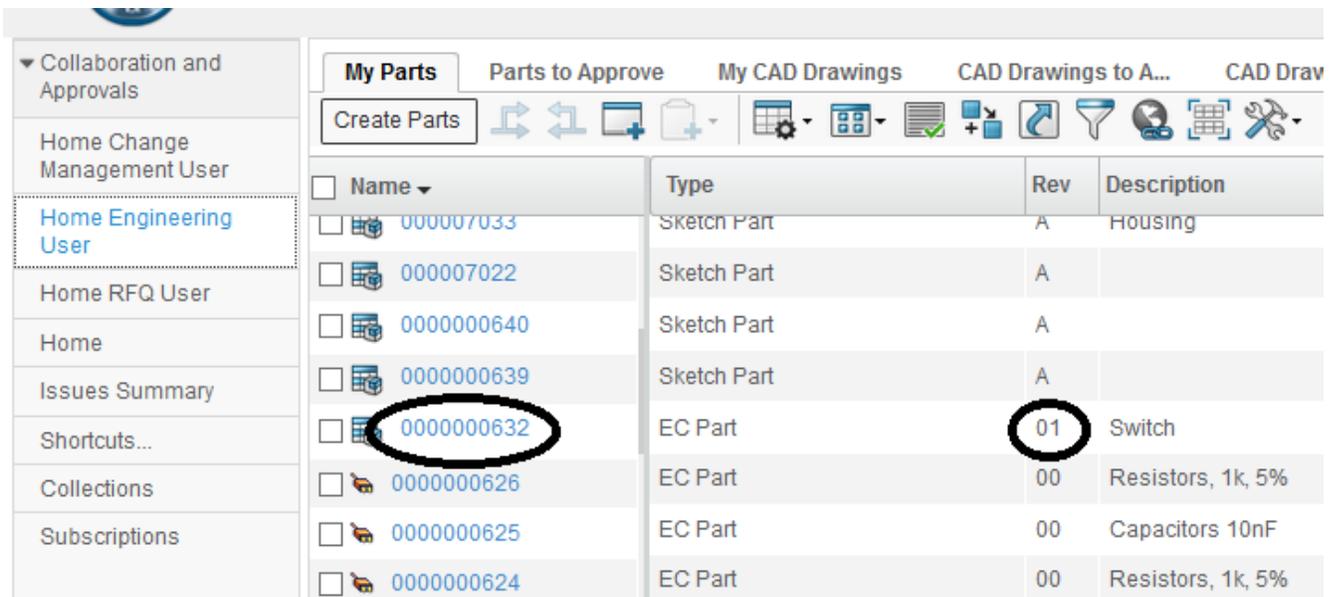
- Open...
- Delete
- Merge...
- Approve...**
- Reject...
- Change Owner...
- Apply

Type	Description	Status	Created
BOM Markup	Replace index	Proposed	2/22/2016

Version	8	Date:	30-April-2016
Status	Template		94



The revised parts contain the new component replaced; select part revised from Change Request Affected Items or from dashboard for Engineering User



Select command Bill Of Materials

Version	8	Date:	30-April-2016
Status	Template		95

Modified : 2/22/2016 11:22:46 PM

EBOM EBOM Common MBOM Plant Specif... Routing Where Used Ma

Reports

Name	Type	State	Rev	F/N
0000000632	EC Part	Preliminary	01	
0000000100	EC Part	Released	00	4
0000000097	EC Part	Released	00	3
0000000487	EC Part	Released	00	2
0000000017	EC Part	Released	00	1

User can complete EBOM and drawings; in order to approve and release the new revision, see chapter “Change Management Implementation”, from step “Change Order management”

Version	8	Date:	30-April-2016
Status	Template		96

## EC04 Change Notices management

<b>Purpose</b>	MBOM is released; Change Notices are created; Change Notices have to be updated and pushed to CMS	<b>Status</b>	Define
<b>Stakeholders</b>	Change Coordinator		
<b>Beginning</b>	MBOM exists and is released; Change Notices are created after MCO implementation in PLM		
<b>Interactions</b>	Change Coordinator defines start validity date, push Change Notices to CMS and maintain start effectivity dates		
<b>End</b>	Change Notices are released		
<b>Constraints</b>	None		

### Change Notice details

Change Notice is created automatically by the system when a MCO is implemented. If MCO is related to a change in a MBOM, when implemented, the system creates a Change Notice containing the information related to change.

Change Coordinator can find the change notices created using the CMS Change Notices dashboard, selecting the change notice.

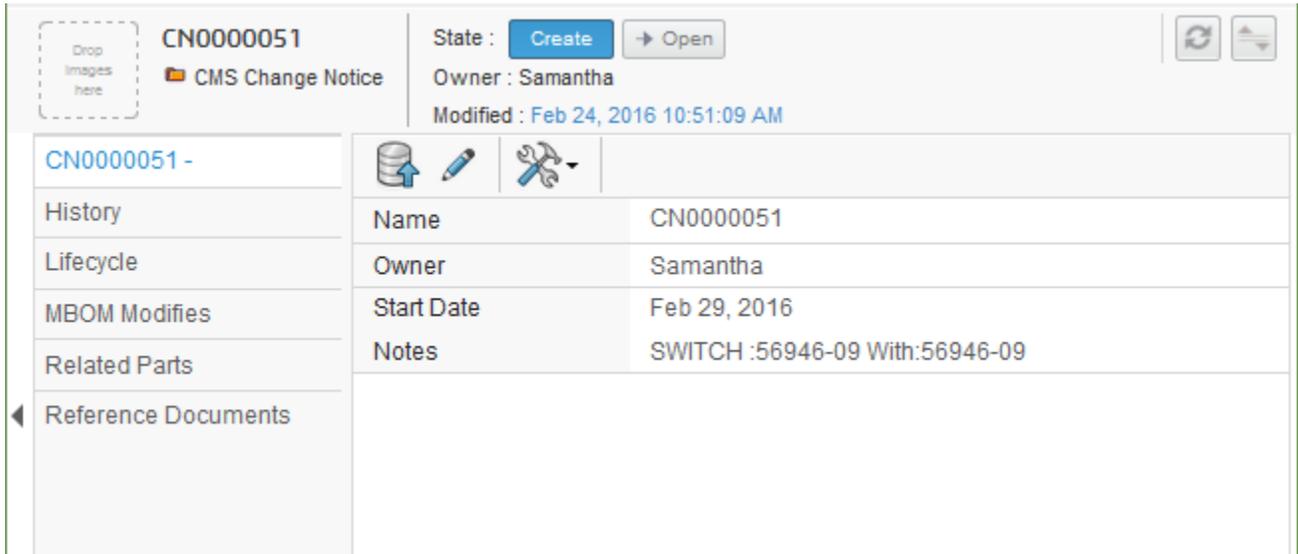
Name	Related Part	Related MCO	Related CA	Related CR	Start Date
CN0000057		MCO-0021298	CA-0019648		Feb 29, 2016
CN0000058		MCO-0021298	CA-0019648		Feb 29, 2016
CN0000059		MCO-0021298	CA-0019648		Feb 29, 2016
CN0000060		MCO-0021298	CA-0019648		Feb 29, 2016
<b>CN0000061</b>		MCO-0021298	CA-0019648		Feb 29, 2016
CN0000062		MCO-0021298	CA-0019648		Feb 29, 2016
CN0000063		MCO-0021298	CA-0019648		Feb 29, 2016

The Change Notice name is created automatically by the system using the prefix “CN” and a sequential portion composed by 7 digits.

The Change Notice contains the following information:

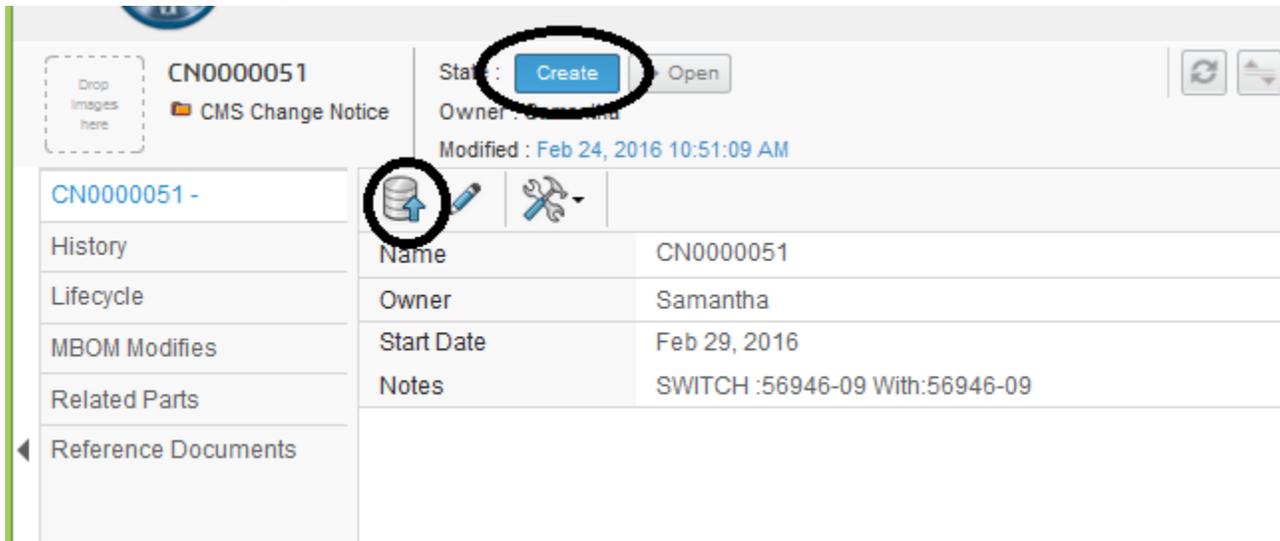
- The user that creates the Change Notice, that is the user that implement the MCO
- The start effectivity date: initially copied from MCO start effectivity date, can be changed
- The changes applied: can be a SWITCH (when a new component revision is created), ADD (when a part is added to a Bill Of Material) or REMOVE (when a part is removed from a Bill Of Material)

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Status	Template		97

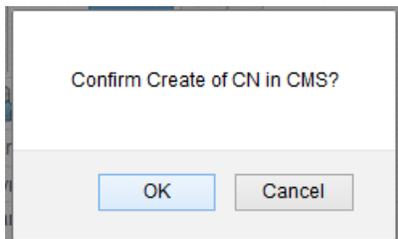


### Change Notices creation

In order to create the Change Notice in CMS, the user has to select the command Create in CMS; the command is available only if Change Notice state is Create.

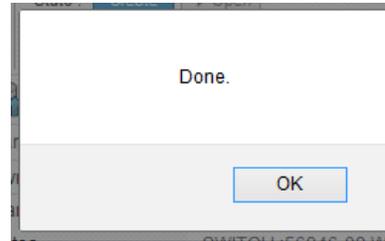
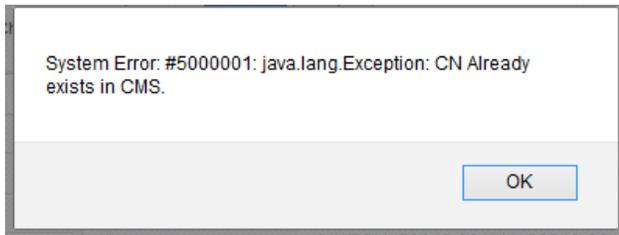


The user has to confirm the export



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Status	Template		98

If the export operation is not completed, the system prompts the error message otherwise prompts the task is completed.



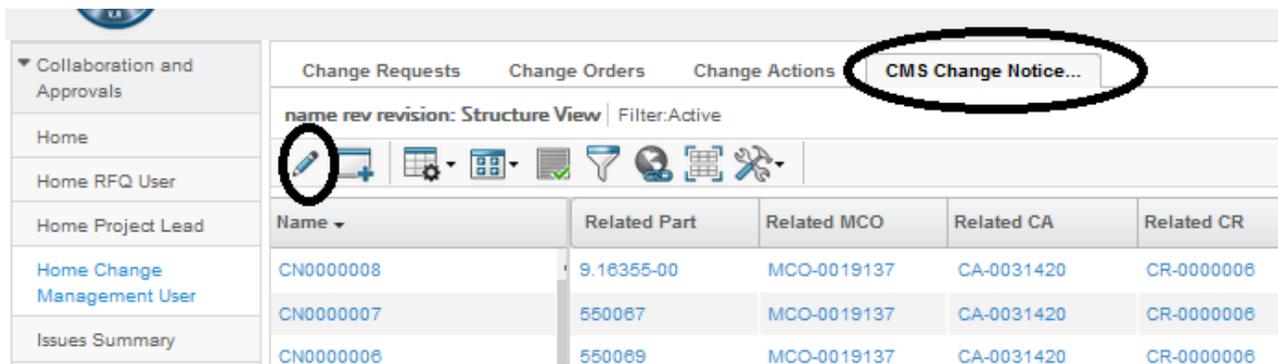
## Update Start Effectivity Date

Once the Change Notice is created in CMS, the Change Coordinator can update the Start Effectivity Date.

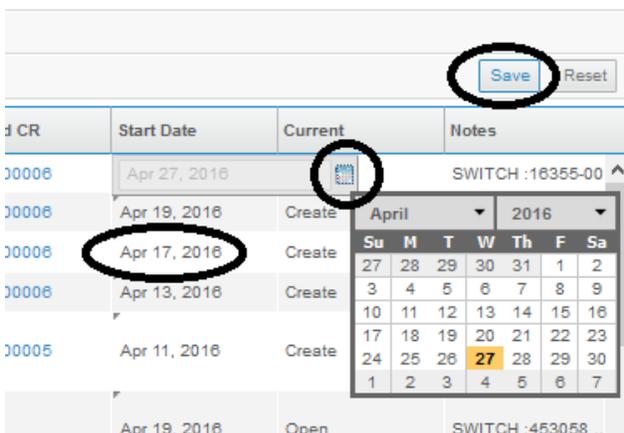
The user can use a massive update function in order to update several Change Notices or can update a specific Change Notice.

### Massive Update

The user has to select the tab “CMS Change Notices”, select the icon Edit



The user has to select the cell with the Start Effectivity Date and update the date; select Save to store the changes



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Status	Template		99

## Update a specific Change Notice

The user has to select the Change Notice code from CMS Change Notices table

<ul style="list-style-type: none"> <li>Collaboration and Approvals</li> <li>Home</li> <li>Home RFQ User</li> <li>Home Project Lead</li> <li>Home Change Management User</li> <li>Issues Summary</li> </ul>	Change Requests    Change Orders    Change Actions <b>CMS Change Notice...</b>				
	name rev revision: Structure View   Filter:Active				
	        				
	Name	Related Part	Related MCO	Related CA	Related
	CN0000008	9.16355-00	MCO-0019137	CA-0031420	CR-000
	CN0000007	550067	MCO-0019137	CA-0031420	CR-000
	CN0000006	550069	MCO-0019137	CA-0031420	CR-000

Select the icon Edit


**CN0000008**
State : [Create](#) [Open](#)

 CMS Change Notice
Owner : Samantha
Modified : Apr 11, 2016 4:35:27 PM

<b>CN0000008 -</b>	  
History	Name CN0000008
Lifecycle	Owner Samantha
MBOM Modifies	Start Date Apr 27, 2016
Related Parts	Notes SWITCH :16355-00 With:16355-00
Reference Documents	

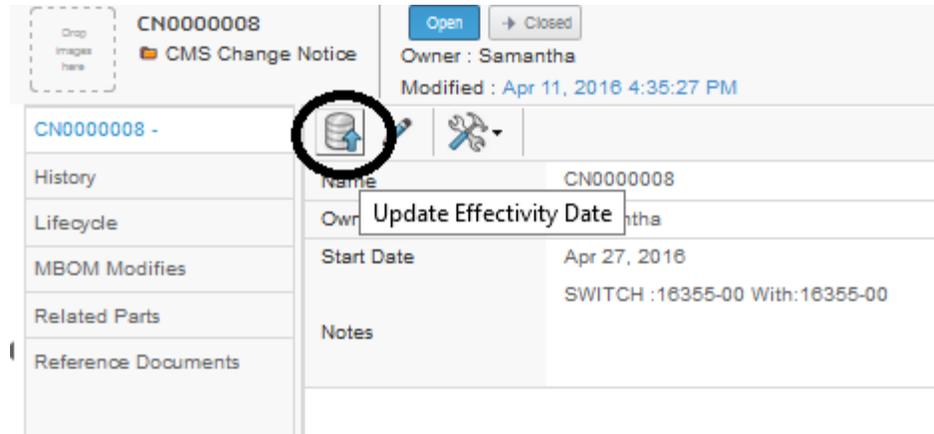
Update the Start Effectivity Date and select Done

<b>CN0000008 -</b>	<b>CMS Change Notice CN0000008 ...</b>	
History	 	
Lifecycle	<i>Fields in red Italics are required</i>	
MBOM Modifies	Name	CN0000008
Related Parts	Owner	Samantha
Reference Documents	Start Date	Apr 27, 2016 
	Notes	SWITCH :16355-00 With:16355-00
	<div style="text-align: right;">   </div>	

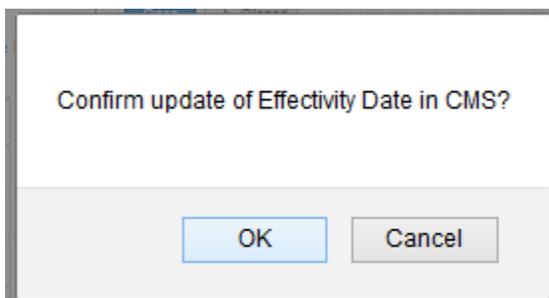
Version	8	Date:	30-April-2016
Status	Template		100

### Push to CMS the Start Effectivity Date updated

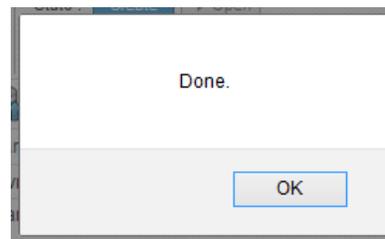
The user has to select the command Update Effectivity Date



The user has to confirm the update



If the export operation is not completed, the system prompts the error message otherwise prompts the task is completed.



### Change Notices related to several MBOM with different Start Effectivity Dates

Change Notice is created automatically by the system when a MCO is implemented. If MCO is related to a change in several MBOMs, the MBOM Engineer can decide if the system has to create a single Change Notice to govern all MBOMs or several Change Notices, one for each MBOM involved.

The MCO contains an attribute “Modify all BOMs” with default value YES; using this value, the system creates a single Change Notice.

Version	8	Date:	30-April-2016
Status	Template		101

Drop images here

**MCO-0019134** State: **Implemented**  
 Owner: Corporate  
 Modified: Apr 29, 2016 3:22:36 PM

History  
 Lifecycle  
 Affected Part Revisions  
 Route  
 MCO Impact Report  
 Related MCOs  
 Related Change Notices  
 Involved MBOMs

Target Start Date  
 Originator: Samantha  
 Manufacturing Responsibility: Malta  
 Manufacturing Responsibility Timezone: (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna  
 Distribution List  
 Approval List  
 Responsible Manufacturing Engineer: Unassigned  
 Responsible Senior Manufacturing Engineer: Unassigned  
 Reason For Sequence Change  
 Modify all BOMs (single CN): YES

In order to create several Change Notices, the user has to select MCO, change the attribute value and re-create the Change Notice. The Change Notices created has to be pushed to CMS; the previous Change Notice in PLM is removed but CMS has to be updated manually.

### Select MCO

There are several ways to search for a MCO to update; one is to search for MCO using the CMS Change Notices table

Collaboration and Approvals

Change Requests Change Orders Change Actions **CMS Change Notice...**

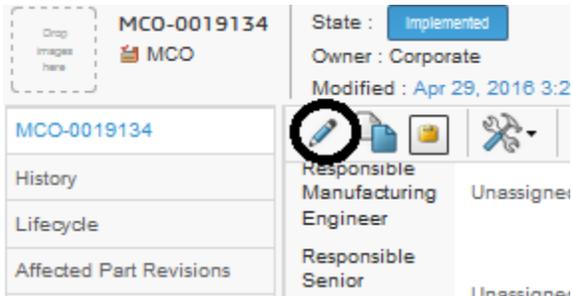
name rev revision: Structure View Filter:Active

Name	Related Part	Related MCO	Related CA	Related
CN0000008	9.16355-00	MCO-0019137	CA-0031420	CR-001
CN0000007	550067	MCO-0019137	CA-0031420	CR-001
CN0000006	550069	MCO-0019137	CA-0031420	CR-001
CN0000005	550068	MCO-0019137	CA-0031420	CR-001
CN0000003	453057P 453057 1.453057	<b>MCO-0019134</b>	CA-0031416	CR-001
	453058P			

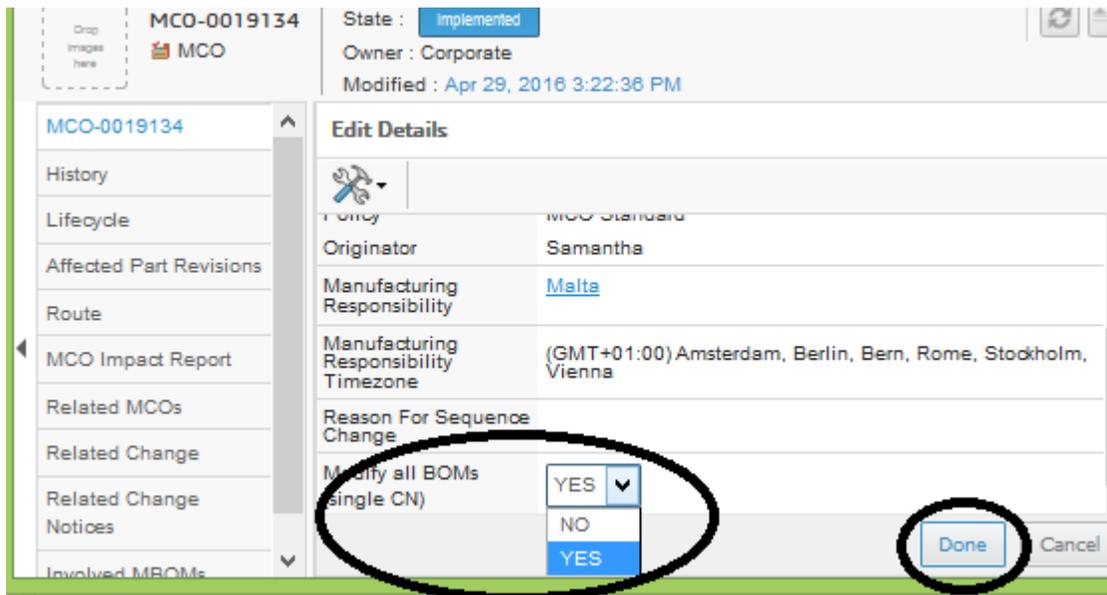
Version	8	Date:	30-April-2016
Status	Template		102

### Update MCO attributes

Select the icon Edit

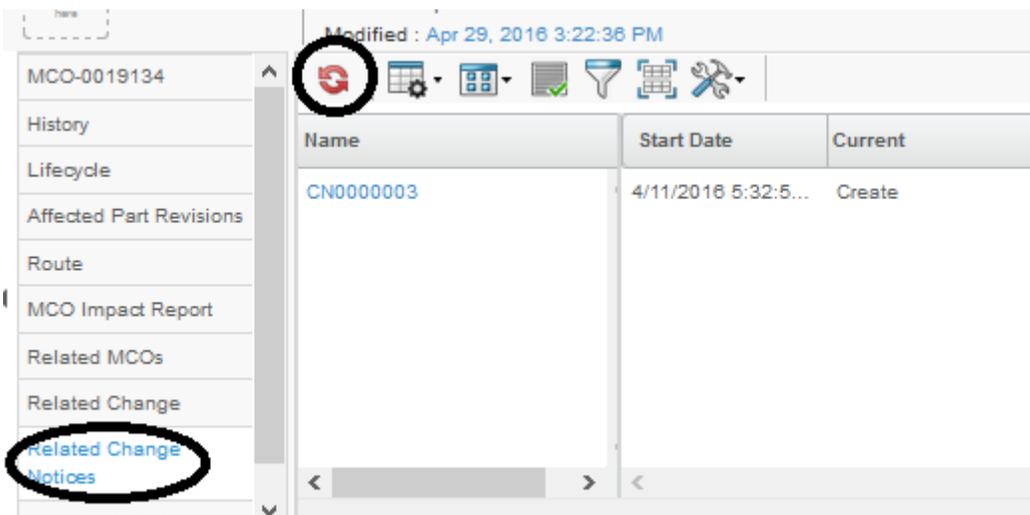


Change the value for attribute Modify all BOMs and select Done



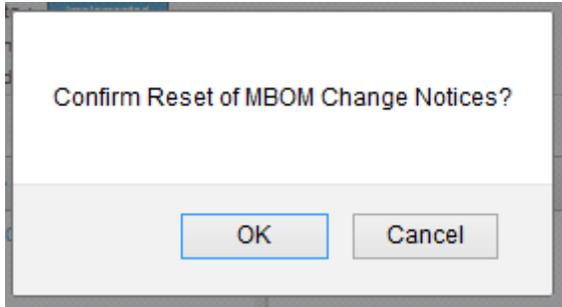
### Create new Change Notices

Select command Related Change Notices and select the icon Reset



Version	8	Date:	30-April-2016
Status	Template		103

The user has to confirm the change



The table shows the new Change Notices created (the number of Change Notices depends on number of MBOMs involved).

MCO-0019134 State : **Implemented**  
 Owner : Corporate  
 Modified : May 1, 2016 4:35:36 PM

MCO-0019134

History  
 Lifecycle  
 Affected Part Revisions  
 Route  
 MCO Impact Report  
 Related MCOs  
 Related Change  
 Related Change Notices  
 Involved MBOMs

Name	Start Date	Current
CN0000011	4/11/2016 5:32:58 PM	Create
CN0000012	4/11/2016 5:32:58 PM	Create

Version	8	Date:	30-April-2016
Status	Template		104

## Change Notices closure

The Change Notices are closed in CMS, applying the change using the CMS Change Notice module. A scheduled task reads from CMS all Change Notices closed: all Change Notices existing in PLM and not closed, are moved to state Closed.

Select command CMS Change Notices, select filter Closed

The screenshot shows the 'CMS Change Notice...' tab selected in the top navigation bar. Below the navigation bar, the interface displays 'name rev revision: Structure View | Filter:Active'. A dropdown menu is open over the filter icon, showing two options: 'Active' (checked) and 'Closed'. The main table below shows a list of change notices with columns for Name, Related Part, Related MCO, Related CA, and Related CR.

Name	Related Part	Related MCO	Related CA	Related CR
CN0000012		MCO-0019134	CA-0031416	CR-
CN0000011		MCO-0019134	CA-0031416	CR-
CN0000008	9.16355-00	MCO-0019137	CA-0031420	CR-

The screenshot shows the 'CMS Change Notice...' tab selected in the top navigation bar. Below the navigation bar, the interface displays 'name rev revision: Structure View | Filter:Closed'. The main table below shows a list of change notices with columns for Name, Related Part, Related MCO, Related CA, and Related CR.

Name	Related Part	Related MCO	Related CA	Related CR
CN0000A10	00000060	MCO-0019348	CA-0031647	CR-0000008

Version	8	Date:	30-April-2016
Status	Template		105