







Engineering Changes Use Cases

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Enterprise Change Management overview





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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
 - Fechnical Approval List (optional)







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EC01 Change Management dashboard

Purpose	The portal shows all Change processes created.	Status	Define
Stakeholders	All users		
Beginning			
Interactions	Users can view the content of the following tabs:		
	 Change Requests: can navigate Change Request information affected, document uploaded as reference and change details Change Orders: navigate to Project and tasks related to change in Change Actions: used by Engineers to create new part revision Change Notices: navigate change notice created after change in to update Start Effectivity Date 	in order t nplementat nplementat	o see parts ion ion, in order
End			
Constraints	None		

Users can select the Home Change Management User command

Collaboration and Approvals	Change Requests Change	ge Orders Change Action	ns CMS Change Notic	si				
Home Change Management User	🗟 🗙 🖻 🗔 🗍 -	👼 - 📰 - 🔜 📫 🤇	1 🔻 😫 🖉 🕆					
Home REQ User	🗌 Name 🗸	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items	Owner	Originated
Home	CR-0000162		Create	description test new CR	Engineering	Current Production	Joseph Zammit	Mar 9, 2016
Issues Summary	CR-0000160	2	Create	test	Supplier	Current Production	Matthew Spiteri	Feb 24, 201
Shortcuts	CR-0000156		Create	Customer request	Engineering	Current Production	Matthew Spiteri	Feb 23, 201
Collections	🗌 👸 CR-0000151	Feb 3, 2016	In Process CO	IknadIknIkjdnfs	Engineering	Current Production	Jessica Camilleri	Jan 22, 201
Subscriptions	CR-0000150	May 31, 2016	Create	Changing the material of	Engineering	Current Production	Jessica Camilleri	Jan 22, 201
	CR-0000149	2	Create	Modification to housing t	Engineering	Current Production	Robert Debono	Jan 22, 201
	CR-0000148	Jan 22, 2016	In Process CO	new revision	Engineering	Current Production	Robert Debono	Jan 15, 201
	CR-0000147	8	Create	Change for impor	Engineering	Current Production	Test Everything	Jan 14, 201
	CR-0000146	May 19, 2016	Evaluate	7th January test	Engineering	Current Production	Robert Debono	Jan 7, 2016
	CR-0000145	2	Evaluate	Matthew Spiteri's Change !	Engineering	Current Production	Robert Debono	Dec 23, 201
	CR-0000144	<u>.</u>	Create	test 4 incomplete CR su	Engineering	Current Production	Robert Debono	Dec 23, 201
	CR-0000143		Create	test4	Engineering	Current Production	Robert Debono	Dec 23, 201
	CR-0000142	<u>.</u>	Create	test	Engineering	Current Production	Test Everything	Dec 18, 201
	CR-0000139	Dec 31, 2015	In Process CO	test	Engineering	Current Production	Robert Debono	Dec 15, 201
	CR-0000137	<u>.</u>	Create	Test for 4500000	Engineering	Current Production	Matthew Spiteri	Dec 15, 201
	CR-0000132	2	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, 201!
	CR-0000113		In Process CO	Component LED is obos	Engineering	Current Production	Test Everything	Sep 16, 201
		<						> 22 object

Change Requests dashboard

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	Change Orders	Change Actions
name rev revision: St	ructure View Filter:A	Active
📓 🗙 🖻 🗔	🔍 - 🛛 🖬 - 🎫	- 🔜 💱 🖉
🗌 Name 🗸	* Create Ne	w Table View
🗌 🛃 CR-0000162	✓ Active	
🗌 🛃 CR-0000160	Inactive	
🗌 👩 CR-0000156		

	Collaboration and	Change Requests Change	Orders Change Actions	CMS Change Notici					
	Home Change	name rev revision: Structure Vie	ew Filter:Inactive						
	Management User	📓 🗙 🖻 🗔 🔍 - 🛙	🖥 - 📰 - 🔜 👫 🖉	7 😪 📰 % -					
	Home Project Lead	□ Name -	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items	Owner	Originated
	Home RFQ User	CR-0000161	Mar 1, 2016	Complete	The current LED supplier	Engineering	Current Production	Jessica Camilleri	Feb 24, 201 ^
		CR-0000158	Sep 1, 2016	Complete	Micro Technologies in C	Supplier	Current Production	Joseph Bugeja	Feb 23, 201
	Shortcuts	CR-0000157	May 1, 2016	Complete	Anew camera shall be in	Process	Current Production	Joseph Bugeja	Feb 23, 201
	Collections	CR-0000155	Feb 29, 2016	Complete	This ECN is being issue	Engineering	Current Production	Jessica Camilleri	Feb 23, 201
	Subscriptions	CR-0000154	Feb 29, 2016	Complete	Replace index	Engineering	Current Production	Joseph Bugeja	Feb 22, 201
		CR-0000136	Dec 21, 2015	Complete	Replace Index	Engineering	Current Production	Robert Debono	Dec 14, 201
		CR-0000135	Dec 21, 2015	Complete	test	Engineering	Current Production	Robert Debono	Dec 14, 201
		CR-0000133	Dec 30, 2015	Complete	Test: create new revision	Engineering	Current Production	Robert Debono	Dec 9, 2015
d		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, 201
		CR-0000126	Feb 1, 2016	Complete	Replace 16108 to 1647	Engineering	Current Production	Robert Debono	Nov 11, 201
		CR-0000125	May 2, 2016	Complete	New Component	Engineering	Current Production	Test Everything	Nov 11, 201
		🗌 👩 CR-0000123	May 1, 2016	Complete	Change request for prod	Engineering	Current Production	Robert Debono	Nov 10, 201
		CR-0000122	Nov 20, 2015	Complete	Change PCB Assembly	Engineering	Current Production	Robert Debono	Nov 10, 201
		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, 201!
		🗌 🗃 CR-0000111		Complete	Change Button component	Engineering	Current Production	Test Everything	Sep 15, 201
		CR-0000108		Complete	mosdify 000052	Engineering	Current Production	Test Everything	May 21, 201
		CR-0000106	Jul 31, 2015	Complete	New PCB introduction	Engineering	Launch	Test Everything	May 16, 201
		CR-0000104	< Comparison of the second sec	Cancelled	new change request	Supplier	Current Production	Test Everything	Apr 30, 201! ¥
									25 objects

The Change Request lifecycle is composed by the following state:

Lifecycle



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

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

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Change Orders dashboard

Collaboration and Approvals	Change Requests Ch	ange Orders Change Ac	tions CMS Ch	ange Notici					
Home Change	name rev revision: Structur	ne new Fritter:Active							
Management Oser		🔜 📫 🖉 🖉 😪))))))))))))))))))))))))))))))))))))))						
Home REQ Liser	Name 🔺	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items	Owner	Originated	Affected Items
Home	CO-0000103	Jan 1, 1970	Complete	Change PCB	Supplier	Current Production	Test Everything	Apr 29, 2015	MCO-0000008
Issues Summary	🗌 🚳 CO-0000104	Jan 1, 1970	Complete	remove 0016	Supplier	Current Production	Test Everything	Apr 29, 2015	₩CO-0000068
Shortcuts	CO-0000109	Jan 1, 1970	In Work	Change component 0005	Engineering	Current Production	Test Everything	Apr 30, 2015	
Collections	CO-0000121	Jan 1, 1970	Complete	Substitute part 0000000	Supplier	Current Production	Test Everything	May 21, 2015	
Subscriptions	CO-0000123	Sep 30, 2015	Complete	mosdify 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
	🗌 📸 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	Iknadlknikjdnfs	Engineering	Current Production	Jessica Camilleri	Feb 23, 2016	~
	<	> <							> 23 objects

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

Collaboration and	Change Requests Change Orders Change Actions
Approvals	name rev revision: Structure View Filter: Active
Home Change Management User	
Home Project Lead	* Create New Table View
Home RFQ User	
Home	CO-000 Com
Issues Summary	
Shortcuts	Jan 1, 1970 Com;

 Collaboration and Approvals 	Change Requests Char	nge Orders Change Ac	tions CMS Change N	lotici						
Home Change	name rev revision: Structure	name rev revision: Structure View Frier.Inactive								
Management User	📮 🛄 - 🔲 - 🔝 - 🛛									
Home Project Lead	Name 🛓	Estimated Completion	State	Description	Type of Change notice	Status EC Affected Items				
Home RFQ User		lan 1 1970	Implemented	New PCB introduction	Engineering	Launch				
Home		5an 1, 1970		New FCD Introduction		Launch				
Issues Summary	CO-0000156	Nov 30, 2015	Implemented	Change electronic comp	Engineering	Launch				
Shortcuts	CO-0000157	Nov 23, 2015	Implemented	Replace component	Engineering	Launch				
Collections	CO-0000210		Implemented	Change PCB sub-comp	Engineering	Launch				
Subscriptions										
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Status	Templa	ite	•		•	8				

The Change Order lifecycle is composed by the following state:

Lifecycle

⊥ 📮 🔆 -							
	Prepare	In Work	In Approval	Complete	Implemented	On Hold	Cancelled

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

•	Collaboration and Approvals	Change Requests Change	je Orders	Change Actio	ns							
	Home Change	name rev revision: Structure View Filter:Pending										
S	Management User		S 🕂	7 🔮 🎚	1 🔆 -							
	Home Engineering User	□ Name	Туре	State		Responsible Org	Assignee	Affected Items	Owning CO	Complet		
	Home Project User	CA-0000242	Change	Pending	\$	METHODE ELE	Matthew S	B 000000560	CR-000013			
	Home			5				~	6 CO-000022			
	Issues Summary											
'	Shortcuts											

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.

 Collaboration and Approvals 	Change Req	uests	Chang	e Orders	Char	nge Ac	ctions
Home Change	name rev revi	sion: Str	ucture V	iew Filter:P	ending	-	
Management User		⊡ o - [88 -	2 📲 🖉] 7)囲 💥
Home Engineering User	Name	* Creat	e New Tat	ole View			State
Home RFQ User		Pendi	ing				
Home		Activ	e				
Issues Summary		Appro	oval				
Shortcuts		Close	d		J		
Collections							

- <u>Filter Pending</u>: shows Change Action related to Change Requests approved with part number not yet revised
- <u>Filter Active</u>: shows Change Action related to Change Requests approved with part number already revised
- <u>Filter Approval</u>: 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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Change Notices dashboard

Collaboration and Approvale	Change Requests C	Change Orders Change A	Actions CMS Change Not	ici				
Home Change	name rev revision: Struct	ure View Filter:Active	\sim					
Management User	📮 📑 - 📰 - 🔜	📲 🏹 😫 🧱 🔆						
Home Project Lead	Name 🛦	Related Part	Related MCO	Related CA	Related CR	Start Date	Current	Notes
Home RFQ User	CN-00048	750143-59	MCO-0021297	CA-0018089	CR-0000155	Eeb 29, 2016	Create	SWITCH :56936-07 With ! ^
Home	CN0000003	TC100	MCO-0000227	CA-0000637		Mar 4, 2016	Create	SWITCH 'TC101-00 With'
Issues Summary	CN0000004	TC100	MCO-0000228	CA-0000638		Mar 5, 2016	Create	SWITCH :TC102-00 With:
Shortcuts	CN0000005	000000674	MCO-0000146			Feb 21, 2016	Create	ADD :00000686-00 ADD :
Collections	CN0000006	000007070	MCO-0016452			Dec 31, 2049	Open	ADD :090195
Subscriptions	CN0000007	000000095	MCO-0000057	CA-0000209		Feb 20, 2016	Create	ADD :0000000100-00 ADI
	CN0000010	000000631	MCO-0019574	CA-0018084	CR-0000154	Feb 28, 2016	Create	SWITCH :000000632-00
	CN0000011	000000637	MCO-0019574	CA-0018084	CR-0000154	Mar 27, 2016	Create	SWITCH :000000632-00
	CN0000012	750142-59	MCO-0013969	CA-0000824		Feb 27, 2016	Create	ADD :54674-00 ADD :162
1	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	750140-58	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 !
								86 objects

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

 Collaboration and Approvals 	Change Requests	Change Orders	Chan
Home Change Management User	name rev revision: St	ructure View Filter:A	ctive
Home Project Lead	* Create New	Table View	v
Home RFQ User	Name 🔺	ited Pa	111
Home	CN-000 ✓ Active	43-59	
Issues Summary	CN000(Closed)o	
Chartauta	CN0000004	TC100	

The Change Notice lifecycle is composed by the following state:

Lifecycle	
CN0000003 rev -: Lifecycle	
=· 🖌 🎵 📮 🔆 ·	
Create Open — Closed	

Active states are: "Create" and "Open" Closed states are: "Closed" and "Rejected"

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EC02	Change Management implementation					
Purpose	 EBOM and MBOM are completed and implemented; a request for a change is raised for different reason: from Customer, with new specification from Supplier, with a proposal to improve production internally 	Status Define				
Stakeholders	Change Coordinators, Design Engineers and Management					
Beginning	A Change Request is raised					
Interactions	Users can create a Change Request, providing information to describe req Change Coordinators can define a team that has to provide information impact analysis. When all team members complete their tasks, Change Coordinator can me to Management for approval. Management has to approve Change Request. Management can decide to period of 4 weeks; after this period, if request is not presented, Change F by Change Coordinator. If Change Request is approved, Change Order is planned. Change Order can implement also a project, depending on process Customer driven or Methode driven. Users involved in Change Order implementation will be notified in order to	uested change. on related to costs and ove the Change Request o hold request for a max Request can be removed type: Supplier driven, o complete tasks				
End	Change Order is implemented or rejected					
Constraints	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

Drop images here Part (1)	Slider State : A Owner : C Modified :	pproved ← Released → orporate 4/21/2015 5:23:08 PM	Obsolete	Drop files here	
000000018 1	Change Order	Change Request Cl	hange Legacy	MECOs	
Bill Of Materials	* 🛞 🚍 🕻		- 📃 🖉 🏹	😫 🗏 🔆	-
Equivalents		Change Action Info	ormation and Assig	nment	
Change Management	□ Name	Change Action	Status	State	Assignee
Specs & Documents					
Related Parts					
Collaboration					
Multiple Ownership Access					
Manufacturing Details					
Customer Supplier Part N					

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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 Unassigned
Severity Low V
Description
Reason for Change
Responsible Organization
Done Cancel

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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	State : Released Owner : Corporate Modified : Mar 17, 201	6 6 <u>;20:46 DM</u>		
000000022 01	Change Order	Change Request Chang	e Legacy	
Bill Of Materials	⊕ 米	- - - - -	5 5 47 5	7 😪 📰 🗞-
Change Management		Change Action Infor	mation and Assign	ment
Specs & Documents	Name	Change Action	Status	State
Related Parts		CA-0000125		Complete
Collaboration			•	Desdies
Manufacturing Details	CR-0000163	CA-0024535	Ŷ	Pending
Vendor Part Numbers				
CMS Information				
IHS Information				

Change Request created standalone



Collaboration and Approvals	Change Requests Chan	ge Or	ders Projects				
Home Change	name rev revision: Structure	View	Filter:Active				
Management User	📓 🗙 🖻 📮 🛄 -	.	· 📰 • 📰 • 📰 ·	7 😪 🗐	**		
Home Engineering User	□ Name	٨	Estimated Completion -	State	Description	Type of Change notice	Status EC Affected Items
Home Project User	🗆 👸 CR-0000103		Oct 30, 2015	Evaluate	revise 14783	Supplier	Current Production
Home	CR-0000105		Jul 1, 2015	In Process	Change component 0005	Engineering	Current Production
Issues Summary	CR-0000102			In Process	remove 0016	Supplier	Current Production
Shortcuts	🗆 📸 CR-0000107	5		Create	Component 00000011 mo	Supplier	Launch
Collections	🗆 📸 CR-0000109	5		Create	Change components with	Engineering	Current Production
Tasks	🗆 👸 CR-0000110	P .		Create	Cost reduction for new ele	Engineering	Current Production
Subscriptions	🗆 📸 CR-0000113			In Process	Component LED is oboslete	Engineering	Current Production
Meetings	CR-0000116			In Process	Change PCB sub-compon	Engineering	Launch
My Calendar	□ 🛤 CR-0000117			Create	Change Index component	Engineering	Launch Y
Decisions	< >	<					> 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

	Modified : Mar 17, 2016 5:44:42 PM	/				
Properties Engin	neering Detai Affected Items	Change Actions	Reference Documen	Review Routes	History Images	
🖉 🔽 🔽 💌	🛅 🔊 🖻 🗔 🚱 🔆 -					
Information and Statu	S					
Messages				Status	÷	
Basic						
Change Coordinator				Owner	Matthew Spiteri	
Change Details and Re	elated 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 Approv	vers					
Evaluation Reviewers List				Distribution List		
Extended Attributes						
Originated	Dec 15, 2015			Modified	Mar 17, 2016	
Estimated Start				Estimated Completion		
Actual Start				Actual Completion		
Responsible	METHODE ELECTRONICS					

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Select icon Edit



Change Originator can complete information; when completed, select Done

	Properties Pro	cess Details Affected Items Change Actions	Reference Documen	Review Routes	History Images	
	📮 🗟 🔆 -					
		Fields In red Italics are required				^
	Information and State	IS				
٨	lessages			Status	*	
	Papio					
	Basic			0		
C	nange Coordinator	<u>Clear</u>		Owner	Matthew Spiteri	
h	Change Details and F	elated Information				
C	hange Notice Type	Process V		Status Affected Items	Current Production	
C	ategory of Change	Product Improvement		Severity	Low 🗸	
		Test for process			Test for process	
1	escription			Reason for Change		
				· · · · · · · · · · · · · · · · · · ·		
F	rogram/Platform #			Notes		
						.4
0	uration Alert Days	5		Dependent Parts	FALSE V	
C	onnected RFQ	RFQ000003-02 <u>Clear</u>				
h	Reviewers and Appro	vers				
E	valuation Reviewers					
L	ist	<u>Clear</u>		Distribution List	<u>Clear</u>	
						Done Cancel

Version	8	Date:	30-April-2016	
Status	Template			16

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

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

in the second seco	dified : Mar 17, 2016 5.44.42 PM										
Properties Engine	eering Detai Affected Items	Change Actions	Reference Documer	1 Review Ro	utes H	listory Images					
1 🛛 🖉	i 🔊 🖻 🗖 🚱 🔆 -										
Supplier Details											
Owner	Matthew Spiteri				Origin	nated	Dec 15, 2015				
Customer Name											
RiskAssessment	FALSE				Custo	mer PPAP	FALSE				
Description	Test for 4500000										
Affected Items											
Name 🛆						Туре		Rev		Description	
						No Objects	Found				
Functional Safety	FALSE				Imple Confid	mentation dence Level				Review QUALITY HISTORY	FALSE
Costs Implementation											
Quotation Currency	Unassigned										
				Lead Time				Tota	l Costs		
Comp. Tool Material				Unassigned				0.0			
Comp. Tool Labour				Unassigned				0.0			
Comp. Tool Subcontra	ict			Unassigned				0.0			
Assy Equip. Material				Unassigned				0.0			
Assy Equip. Labour				Unassigned				0.0			
Assy Equip. Subcontra	act			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			

Change Request related to Change Notice Type "Engineering"

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

Change Request related to Change Notice Type "Supplier"

1						
Properties Supplie	er Details Affected Items Change Actions Reference Documen Review Rout	es History Images				
2 🛛 🖉 🖉						
Supplier Details						
Owner	Matthew Spiteri	Originated	Feb 24, 2016			
Supplier Name		Vendor Code				
Vendor Contact		Vendor Telephone Number				
RiskAssessment	TRUE	Customer PPAP	TRUE			
Description	test					
Affected Items						
Name 🛆		Туре		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						
0						
Logistic (Packaging		Relocation of	_			
Handling, Other)		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"

Properties Proce	ess Details Affected Items Change Actions Reference Documen Review Rout	es History Images				
1 🖪 🙎 🕅	1 🔊 🖻 🗔 😪 🔆 -					
Process Change Details	S					
Owner	Matthew Spiteri	Originated D	ec 15, 2015			
Process Affected						
RiskAssessment	FALSE	Customer PPAP FA	ALSE			
Description	Test for process					
Affected items						
Name 🛆		Туре		Rev	Description	
000000023		EC Part		01	Plunger	
Reason of Change						
Quality		Capacity				
concern/improvement		Relocation of machine				
Difficult operation		tool				
Reuse of inactive		Trouble of machine, tool, gauge				
machine, toor		tool, gaage				
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
Affects of the Change						
Piece Cost Affected		Piece CostAffected (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

Drop Images here CR-0000163 Change Request	Test for process	State : Create Owner : matthew.s Modified : Mar 17, 2
CR-0000163	Properties Pr	ocess Details
Content	2 3 8 6) 🔊 🖻 🗖
Collaboration	Information and Sta	itus
Impact Analysis	Messages	

Select icon to query RFQ in state PRF

Program/Platform #	
Duration Alert Days	5
Connected RFQ	<u>ear</u>
Reviewers and Approv	vers
Evaluation Reviewers	

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

Search Refinement	Search Results 1 - 3 of app	prox. 3 Results Page Size: 50	▶ (Max Value: 1000) 🖮 🗟 1
Q2	E Q - 🛋 - 🗔 - 🛛	🖪 • 🔜 🛟 🔚 😹 • 🗐	
Policy: Request for Quotation Request for Quotation Revision	Name 🔺	Policy Description	Status Issue Date Owner
State: PRF	RFQ000001-04	Req New test	PRF Jan 18, Test
▼ Taxonomies	OF RFQ000003-02	Req pls quote for a new IGNI	PRF Jan 18, Test
 Types □ Project Management(3) □ Ø Request for Quotation(3) 	RFQ000004-06	Req New RFQ test	PRF Mar 15, Kevi
▼ Attributes			
Name			
Originated			
Modified	< >>	<	
< >			Submit

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

	mouniou . mur 11, 2010 0.45.551 m
CR-0000163	Properties Process Details Affected Items Change
Content	🗔 😪 🔆 -
Collaboration	Fields In red Italics are required
Impact Analysis	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)					
Q 2	🔄 🔍 - 🕒 - 🗔 - [🗊 - 🔜 🕂 🗐	**			
Role: Change Coordinator Leader State: Active	Name 🔺	Role	Full Name	Company		
^	O ¢ davidd	Basic User, Prod	🕼 Debono, David			
 Taxonomies 	O& Edward.Gingell	Basic User, Prod	🕼 Gingell, Edward			
▼ Types	O ¢ elias.moussa	Basic User, Prod	🏠 Moussa, Elias			
- Person(10)	O ¢ jessicac	Basic User, Prod	🏠 Camilleri, Jes			
 Attributes 	O ¢ joe.budgeja	Basic User, Prod	🕼 Bugeja, Joseph			
Nama	⊖ ≵ Johann	Basic User, Prod	🕼 Barbara, Johann			
Name	O ₽ laura.bonello	Basic User, Prod	🏠 Bonello, Laura			
Originated	O ₽ robert.debono	Basic User, Cha	🕼 Debono, Robert			
Modified	O¢ robertot	Basic User, Prod	🕼 Tiscio, Roberto			
Description	O ≵ stanley.muller	Basic User, Prod	🏠 Muller, Stanley			
Change Assignment	< >	<		>		
< >				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

Drop Images here CR-0000137	Test for process	State : Owner : ma Modified : M	Create atthew.sp //ar 17, 20	→ Eva viteri)16 5:5(6:04 PM	Drop files here	
CR-0000137	Properties P	rocess Deta	ails 🤇	Affect	ed Items	Change	Ac
Content	Actions - Move T	o• 🖉	G 🗖		- 0-		J
Collaboration				-	-		
Impact Analysis	Name 🔺		Туре	Rev	Requested	Change	.0
	□ CA-0000248 (1)					

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-		30-April-2016	
Status	Template			22

Search Refinement	Search Resu	lts 1 - 50 of ap	oprox. 1637	6 Res	sults Pa	ge Size: [50) (Max Value: 100	0) iet iet	123456
Q2	E Q-	• -	•	+) 	A-			
Policy: EC Part Sketch Part Standard Part Part Specification	Display Na	ame 🔺	Revision		Туре	Policy	Description	State	Modified C
CAD Drawing Design Policy	00-94	496-517.849	00	é	Ven	EC		Rel	Mar 9, ^
Drawing Print Controlled Documents	00-94	496-517.850	00		Ven	EC		Rel	Mar 9,
 Taxonomies 	^ □ 👪 0000	000001	А	é	Part	Dev	EPB LH	Co	Jan 1
= Tunos	0000	000002	02		Part	EC	EPB RH	Rel	Jan 1
• Types	0000	000002	Α	_	Part	Dev	EPB RH	Co	Jan 1
Vendor Part Number(7	0000	000002	01	≅	Part	EC	EPB RH	Rel	Mar 1
Hardware Part(1121)	0000	000003	01	-	Part	EC	Roof Switch	Appr	Jan 1
Libraries	0000	000003	А		Part	Dev	Roof Switch	Co	Jan 1
	0000	000003	02	é	Part	EC	Roof Switch	Rel	Jan 2
 Attributes 	0000	000003	00		Part	EC	Roof Switch	Appr	Jan 1
Name	0000	000004	A		Part	Dev	Housing	Co	Jan 1
Originated	0000	000004	00		Part	EC	Housing	Rel	Jan 1
Modified	0000	000005	А		Part	Dev	Toggle	Co	Jan 1
wounieu	0000	000005	00		Part	EC	Toggle	Rel	Jan 1
Description	0000	000006	Α		Part	Dev	Тір	Co	Jan 1
Comment	<	>	č		- ·	50	-	.	
< >	×								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



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

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

Change Assessment

🗌 Name 🔺	Revisior	Туре
EBOM (17)		^
26010001	1	<mark>≣</mark> ₽;
52819	02A	<mark>≣</mark> ₽;
52820	01A	<mark>≣</mark> ₽;
52821	01A	<mark>≣</mark> ₽;
52822	04A	<mark>≣</mark> ₽;
□ 🔜 52826	09A	P:



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



Version	8 Date: 3		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 comm	nand Affected Items ar	nd sele	ct ic	con Edit				
Drop Imagaa hara	A new camera shall be introduced as was introduced already on ATL3 and ATL5 to detect for any short shot	State Owner Modif	: Cre r : matti le <u>d : An</u>	tew.spiteri -> 2015.4:57:12 PM	Drop flas hana			
CR-0000002	Properties Process De	tails	Affec	ted Items Change A	Actions	Reference	e Documen	Re
Content	Actions - Move To -	5		- 🔂 - 💷 - 📃	I 🖉 🏹	' 💽 🗐	*-	
Collaboration	Name -	Туре	Rev	Requested Change	Change C	State	Related CA	
Impact Analysis	CA-0031413 (1)			, , , , , , , , , , , , , , , , , , , ,	5			
	453055	RPart	00	For Revise		Publish	CA-0031413	

Stop 1 Solast command Affected Items and colost icon Edi

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

hragas hara	as was introduced already on ATL3 Owner : matthew.spiteri and ATL5 to detect for any short shot Modified : Apr 9, 2016 4:57:12 PM
R-0000002	Properties Process Details Affected Items Change Actions Reference Documen Review Routes History Images
ontent	Actions - Move To - 🗶 🕢 🗔 - 🔜 - 📰 - 📰 🖉 🏹 🔕 🧱 🗞 -
ollaboration	Mass Update Save Recet
npact Analysis	Name Type Rev Requested Change Change Cate Related CA
	CA-0031413 (1)
-	453055 Berart D For Revise Publish @CA-0031413
	For Obsolescence
	For Release For Release
	For Update
	None

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

Drop images here CR-0000117	Change Index com	ponent State : Owner : Modified	Create matthew.spit : 10/28/201	 Evaluate teri 5 2:40:42 PM 	Drop files here	
CR-0000117	Properties En	gineering Detai	Affecte	d Items Re	eference Docu	men
Content	Actions -	- 🗔 - 🖉	70	% -		
Collaboration	Bocument			• 6.		
Impact Analysis	Add Existing	lame 🛆			Title	
	+ Download					
	B Remove					
	× Delete					
Drop Images here de CR-0000101 Cha Barrow CR-0000101 Cha Change Request spe	nge for new customer State ification Owne Modifi	Create → Evaluate r : Test Everything fied : 4/21/2015 10:58:25 PM	Drop files here			Ð
CR-0000101 Affect	ed Items Candidate Items	Reference Documen	»			×
Content	- 📮 🛄 - 🛛 🐺 🏹	7 🔮 🎇 -				
Collaboration	💖 Name 🛆 🛛 Title		Rev Ver Type	Actions	Description State	
□ 0/1	DOC-0000013 X152-EPB- 17-05-12.d	-ROOF-SPEC-v1.4 oc	1 1 Doc	ument 📓 📥 🗟	ln Work	4
				•	Page 1 🗸 of 1	

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

aluate ything 15 11:10:12 PM	Drop files here	DF-SP		
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.

CR-0000163	Properties P	rocess Details Affect
Content	🗔 😪 🔆-	
Collaboration		Fleids in red italics are required
Impact Analysis	Process Change De	etails
	Owner	Matthew Spiteri
	Process Affected	
	Risk Assessment	FALSE 🗸
	Description	TRUE cess FALSE

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

Notice: Please, provide a Risk Assessment document as	Reference Document
	ОК

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

Selec	t tab Reference D	Oocument, select	command Do	ocument f	from Acti	ions menu	L	
juest	Test for process	State : Creat Owner : matthe Modified : Mar 1	e → Evaluate w.spiteri 8, 2016 12:37:21	PM -	Drop files here			
	Properties	Process Details	Affected It	tems	Change A	ctions	Reference D	ocumen R
	Actions 🗸 🗖	ि- 📮 (2 7 😪	։⊁Դ-				
	Document		Title	Rev	Ver	Type	Actions	Description
	Add Existing							
	🛓 Download							No Objec
	🗟 Checkout							
	- Remove							
	× Delete							

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
-\$\$	
Fleids in red Italics are required.	
Name	AutoName
Туре	Document
Policy	Document Release
Title	Risk Assessment title
Description	Risk Assessment description
Document Approver Role	✓
Document Type	Risk Assessment
	Next Cancel

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

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Step 2 of 2: Upload Files		
≫		
File Format	Comments]^
Browse fb file selected.		
Browse No file selected.		
Browse No file selected.	:	
Browse No file selected.		
Descreen Min file and add		~
	Previous Done Cancel	

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

	Mo	odified : Mar 18,	2016 12:57:45 PM	he				
	Properties Proce	ess Details	Affected Items	Ch	ange	Actions	Reference Doc	umen Revie
	Actions 🗸 📑 🔒 -	📑 - 🖉] 🖓 🔮 🛠	-				
-	🗆 🔒 👻 Name 🛆	Title)	Rev	Ver	Туре	Actions	Description
	□ 0/1 DOC-0	0000202 Rist	kAssessment title	0	1	Document	N 12 6 6	RiskAssessm

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 A Risk Assessment title	Assessment description	State: Private + In Work + Frozen Owner : Ind Ynew spiteri Modified : Mar 18, 2016 12:57:45 PM
Risk Assessment title	≣ - % -	
Files	Name	DOC-0000202
File Versions	Revision	0
Revisions	Туре	Document
Issues	Vault	eService Production
Routes	Title	Risk Assessment title
Discussions	Description	Risk Assessment description
DISCUSSIONS	State	In Work
Retention Schedules	Owner	Matthew Spiteri
Lifecycle	Originated	Mar 18, 2016
Multiple Ownership	Modified	Mar 18, 2016
Access	Policy	Document Release
History	Access Type	Inherited
Where Used	Document Type	Risk Assessment
Classification	Classification Path(s)
Classification	- · · · ·	7 🗐 🕸 -

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

tisk As	ssessment description Released Owner : matthew.spiteri Modified : Mar 18, 2016 1:02:36 PM
	Lifecycle
	DOC-0000202 rev 0: Lifecycle
	Private

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	
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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

Properties Engineering	Detai Affec	ted Items		Change Actions	Reference	Documen	Review	Routes	His
〃 ★ 📮 🖫 - 📾 - 闕 💱 🖉 🏹 😫 🗮 💥 -									
□ Name ▲	Туре	CA State		Governing CO	CA Effectivity	â 🖉 📶	Assignee	Sr Assigne	e
🗆 📸 CA-0000130	Change Act	Pending	\$			\$ 🖉 🏦			

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

ň	Assignee	Sr Assignee	Approv
ii.	[)

Select a user and click on button Submit

Version	8	Date:	30-April-2016	
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Search Refinement		Search Results 1	- 10 of ap	oprox. 10 Results Pa	ge Size: 50) (Max Value	ə: 1000) 📧 🗟
	Q 2	🔄 🔍 - 💿 -	-	8• 🔜 💱 🗐	⅔ -		
Role: Design Engineer A State: Active	uthor	Name 🔺		Role	Full Name	Comp	any
·	^	O∯ alexanderg		Basic User, Librari	🕼 Galea,	Alexander	
 Taxonomies 		⊖ ∲ allen		Exchange User, Ba.	. 🕼 Bonnic	Test, All	
 Types 		O ¢ evans		Basic User, Librari	🕼 Stringo	s, Evan	
Person(10)		O ⊉ Gino.vella		Basic User, Librari	🏠 Vella, E	ugenio	
 Attributes 		O ₽ giuseppe.loreto		Basic User, Librari	🕼 Loreto,	Giuseppe	
Namo		⊜ ∲ joseph.zammit		Basic User, Produ	🏠 Zammi	t, Joseph	
Name		O‡ MarioP		Basic User, Desig	🏠 Pullicin	o, Mario	
Originated	(O∲ matthew.spiteri		Exchange User, Ba.	. 🏠 Spiteri,	Matthew	
Modified		Of Samantha		Basic User, Librari	🕼 Grima,	Samantha	
Description		O✿ steve.zahra		Basic User, Librari	🕼 Zahra,	Steve	
Change Assignment							
Comment							
Country	~	<	>	<			Submit
x	/						
Ooc Change Actions							
a 🗶 💥 🗖 📑 -	. •	- 🛃 👫 🖉 🖓		≣ ⅔-			
s Mass Update	¥						Save
□ Name	ty 🕼 a	Assignee	S	r Assignee Appr	oval List	Responsible Org	Planned End

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

METHODE ELE... Oct 30, 20...

Matthew Spiteri

🋊 🖉 🚻

and Estimated Finish Date

🗆 👸 🙆 CA-0000157

ev

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

CA-0000113	Properties	Summary View	Related C	As Histo	ry »		× 7	I
Content		≿ -						
Collaboration	Change Action	n Details						^
Impact Analysis	Responsible	Company Name		Category of	Unassigned		~	
Related MCOs	Organization	company name		Change	Chabolynou			
Related Planning Change	Governing CO			Governing CR	CR-0000101			
Manufacturing Responsibi								
	Reviewers an	d Approvers						
	Assignee		<u>Clear</u>	Senior Assignee			<u>Clear</u>	
	Approvers List		<u>Clear</u>					
							_	~
						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.

Drop Images here CR-0000163	Test for process State : Owner : m Modified :	Create → Evaluate matthew.spiteri Drop files here : Mar 18, 2016 10:31:35 AM	
CR-0000163	Properties Process Det	etails Affected Items Change Actions Reference Documen Review Ro	outes
Content	Actions - Move To -	G 🗔 🗋 - 🖼 - 🎫 🔜 💱 🖉 🏹 🚱 🧱 🎇 -	
Collaboration		Type Rev Requested Change Change Cc State Related CA	
mpacrialitio	CA-0024535 (2)	\frown	
	000000022	Released CA-0024535	
	000000037	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

Properties	s Proce	ess Det	ails	At	fect	ed Ite	ms	Chan
Actions -	Move To -	ø	G	+	(•	o -	•••
🗌 Name 🔺	Existing C	hange l	Request		ev	Requ	lested	Chang
CA-00	* New Cha	nge Rec	quest		Г			
🗆 👪 0	Existing C	hange.	Action		1	For	Revise	
🗹 📷 🖢	🐨 New Cha	nge Act	tion	-	0	ForF	Revise	

The system creates a new Change Action for select parts

Properties Process Deta	ils	Affect	ed Items	Change A	ctions	Reference Documen
Actions 🗸 Move To 🗸 🖉	G 🗖		- 0			। 💎 🔮 🗮 🔆 -
🗌 Name 🔺	Туре	Rev	Requested	Change Co	State	Related CA
CA-0024535 (1)						
000000022	≣ Part	01	For Re		Releas	@CA-0024535
CA-0024536 (1)						
000000037	≣ Part	00	For Re		Releas	CA-0024536

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

iest	Test for process State : Owner : ma Modified : N	Create + Evalua atthew.spiteri Mar 18, 2016 10:31:3	te p ni 35 AM	rop es sre						
	Properties Process Deta	nils Affected	Items Ch	ange	Actions Ref	ference Docun	nen	Review Routes	B History	Ima
	Mass Update 🗸 🗸									
	Name .	Туре	CA State	۵	Governing CO	CA Effectivity	\$ 2 📙	Assignee	Sr Assignee	Арр
	CA-0024535	📸 Change Ac	Pending	÷			4 🖉 🏦	Matthew Spiteri	r	\mathbf{Y}
	CA-0024536	Change Ac	Pending	÷			4 🖉 👔	Matthew Spiteri		

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

 Collaboration and Approvals 	Change Requests Change Orders Change Actions	
Home Change Management User	name rev revision: Structure View Filter:Active	7
Home Engineering User	□ Name - Estimated Completion	Sta
Home RFQ User	CR-0000163	Cre
Home	CR-0000162	Cre
Issues Summary	CR-0000160	Cre
Shortcuts	CR-0000156	Cre
Collections	CR-0000151 Feb 3, 2016	In F
Subscriptions	CR-0000150 May 31, 2016	Cre
Team he user has to confirm t	he delete	

0	You have chosen to delete the selected items from the database. Deleted items can no longer be accessed from the system. To continue with the deletion, click OK. To cancel the deletion, click Cancel.
C	OK Cancel

Version	8	Date:	30-April-2016	
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

Notice: The selected object(s) cannot be deleted because of follo 1. The selected CR object(s) have affected items 2. Context user does not have access to perform this ope 3. The selected object is past Create state.	wing reason(s): ration
 Prevent this page from creating additional dialogs 	
	ОК

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

1 Affected Items Condidate Items No User can also select tab Review and select icon Promote Owner : matthew.spiteri No Modified : Mar 18, 2016 12:37:21 PM Image Image Properties Process Details Affected Items Change Actions Reference Documen Lifecycle CR-0000163 rev -: Lifecycle Image Image Image
User can also select tab Review and select icon Promote Owner : matthew.spiteri Modified : Mar 18, 2016 12:37:21 PM Properties Process Details Affected Items Change Actions Review Rou Lifecycle CR-0000163 rev -: Lifecycle
Image: CR-0000163 rev -: Lifecycle Owner : matthew.spiteri Image: Nar 18, 2016 12:37:21 PM
Properties Process Details Affected Items Change Actions Reference Documen Review Rou Lifecycle CR-0000163 rev -: Lifecycle
Lifecycle CR-0000163 rev -: Lifecycle
Image: Create Image: Evaluate Image: Im

Version	8	Date:	30-April-2016	
Status	Template			36
The system will performs 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 becames the Change Coordinator

🎸 C	🛿 CSS+ 📋 Forms+ 💷 Images+ 😗 Information+ 📄 Miscellaneous+ 🥖 Outline+ 🥒 Resize+ 💥 Tools+ 🔳 View Source+ 🖪 Options+									
PERI	ENCE ENOVIA Eng	jineering BOM N	Management	All 🔽 Search		۹ 🎙			Matthew	Spiteri
		_	_							
uest	Test for process	Skate : Evalua Owner : jessicac Modified : Mar 18	ste 5 8, 2015 - 24:40 PM							く合
	Properties Pr	ocess Details	Affected Items	Change Actions	Reference Documen.	Review	Routes	History	Images	
	a 🖪 🗖 🌔	⋧ ⅔-								
	Information and Sta	tus								
	Messages				Stat	us				
	Pasic									
(Change Coordinator	r Jessica Car	milleri		Ow	ner	Jessica	Camilleri		
	Change Details and	Related Informa	ition							
	Change Notice Type	Process			Stat	tus Affected Items	Current	Production		

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

Messages			All	*			
Create Message Check Mail Delete Selected 🚱 🔆							
		Subjec	* *	Filter			
		From	Received V				
The new Change Request has been assigned.	D	Matthew Spiteri	Mar 18, 2016	Ð			

Version	8	Date:	30-April-2016	
Status	Template		3	37

Transfer ownership to another Change Coordinator

Change Coordinator can transfer the Change Request to another Change Coordinator



Change Coordinator has to enter a comment about transfer

	Transfer Ownership to Change
	🚱 🔆 -
	Fleids in red Italics are required
	Warning : This operation cannot be reversed except by the new owner.
	New Owner
	Cutar
	Transfer Reason
	Change Request assignment
/	Done Cancel

Change Coordinator has also to select another user

Version	8	Date:	30-April-2016		
Status	Template				

Search Refinement	Search Re	esults 1 - 11 of a	pprox. 11 Results Page	e Size: 50 🔹 (Ma	x Value: 1000) 🖮 🖣
	3 E Q	- 💁 - 📑 -	📰 • 🔜 탁 🥅	≈-	
Role: Change Coordinator Leader	Name 🔺		Role	Full Name	Company
 Taxonomies 		dd	Basic User, Produ	🕼 Debono, David	^
 Types 	O ⊉ Edw	vard.Gingell	Basic User, Produ	🕼 Gingell, Edward	
🗹 Person(11)	¢ elias	s.moussa	Basic User, Produ	🏠 Moussa, Elias	
▼ Attributes	_ ≬ jess	licac	Basic User, Produ	🏠 Camilleri, Jessica	
Addibutes	ioe.t	budgeja	Basic User, Produ	🕼 <u>Buqeja, Joseph</u>	
Name	O ⊉ Joha	ann	Basic User, CC Se	🕼 Barbara, Johann	
Originated	O ≵ laura	a.bonello	Basic User, Produ	🏠 Bonello, Laura	
Modified	O ₽ robe	ert.debono	Basic User, Emplo	🕼 Debono, Robert	
Description	O ≵ robe	ertot	Basic User, LM La	🏠 Tiscio, Roberto	
Channe Annianmant		lev muller	Racio Hear Produ	A Muller Stanley	Ň
Change Assignment	Ý				Submit

The new Change Coordinator is also the new Change Request owner

)00163 ange Request	Test for process S	tate : Evaluate wner : joe.budgeja lodiwd : <u>Mar 18, 2019 2</u> .36:22 PM	
	Properties Proc	ess Details Affected Items	Change Actions
	🔊 🗈 🎞 🔇	‰-	
	Information and Status	;	
	Messages		
	Basic		
	Change Coordinator	Joseph Bugeja	
	Change Details and Re	lated Information	
	Change Notice Type	Process	
	Category of Change	Product Improvement	

The new Change Coordinator receives a notification from previous one

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

Messages All ¥									
Crea	Create Message Check Mail Delete Selected 🗟 🔆								
				Subject	*	Filter			
		Subject	D	From	Received V				
		The new Change Request has been assigned.	D	Jessica Camilleri	Mar 18, 2016	Ð			

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

DO163 1ge Request	Test for process	tate : Create ← Owner geo budg Modified : Mar 18, 3	Eviluate + 1	n Review Drop files here	🖺 Risk A
	Properties	Process Details	Affected Items	Change Actions	Refere
	N 🖪 🕅	🗈 🔊 🖪 🗖	🔮 🔆 ·		
	Information and 9	Status			
	Messages				

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

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

3 quest	Test for process	State : Create Owner : joe.budge Modified : Mar 18,	- Evaluate → In eja 2016 2:36:22 PM	Review Drop files here	Risk Assessment title(_
	Properties	Process Details	Affected Items	Change Actions	Reference Documen.	Review Routes
	Lifecycle					\smile
	CR-0000163 rev	- Lifecycle				
	≡· 🗸 🕏	17 🛠				
		Create	Evaluate	In Review	In Proces	Complete

Step 2 Change ownership to Change Originator

Select tab Properties, select icon Transfer Back to Initiator

here	Modified : Mar 18, 2016 2:
CR-0000163	Properties Process Details Affect
Content	🖉 🛛 🖉 🖪 🕒 🗔
Collaboration	Information and Status
Impact Analysis	Messages
	Basic

The Change originator becomes the Change Request owner

Jest	Test for process	s State : Create Swner : matthew Modified : mar ro	.spiteri 2016 3:01:22 PM					
	Properties	Process Details	Affected Items	Change Actions	Reference Documen	Review	Routes	History
	» 🗉 🗖	🚱 🔆 -						
	Information and	Status						
	Messages				Status	1	\$	
	Basic							
	Change Coordin	ator Joseph Bug	eja		Owne	r	Matthew	Spiteri
	Change Details a	and Related Informa	tion					

Change originator receives a notification from previous Change Coordinator

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

Mess	ages				All	v
Crea	ate Me	essage 🛛 Check Mail 🛛 Delete Selected 🛛 🗟 🔆				
				Subjec	*	Filter
		Subject	D	From	Received \bigtriangledown	
		The new Change Request has been assigned.	D	Joseph Bugeja	Mar 18, 2016	

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

 Collaboration and Approvals 	Change Requests Change	ge Orders Change Action	is CMS Change Not
Home Change Management User	name rev revision: Structure	View Filter:Active] 🔻 🔛 🏹
Home Project Lead			
Home RFQ User	Name -	Estimated Completion	State
Home	CR-0000163		Evaluate
Issues Summary	✓ ▲ <u>CR-0000162</u>		Create
Shortcuts	CR-0000160		Create
Collections	CR-0000151	Feb 3, 2016	In Process CO

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

Step 2 Select icon Send Reminder

 Collaboration and Approvals 	Change Requests	Change Orders	Change
Home Change Management User	name rev revision: St	ructure View Filter:A	<pre>Active </pre>
Home Project Lead		A Estim	atod Com
Home RFQ User	Name ↓	iiii Esum	lated Com
Home	CR-0000163		
Issues Summary	✓		
Shortcuts	☑ 🗟 <u>CR-0000160</u>		
0 H F	CD 20 0000454	E-F-2	0040

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

Send Notification	
*.	
	Fields In red Italics are required
Subject	Change Request Notification
Message	Please, provide an update for following request:
	Done Cancel

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

	1			
Im	History	Routes	Review	
Im	History	Routes	Review	
	ristory	Routes	Review	

Select a command to create a Route from Action menu

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



- <u>Create Route</u>: 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
- <u>Create Route Wizard</u>: 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
- <u>Create Simple Route</u>: 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
Туре	Route
Name	✓ AutoName
Template	CN: Review Content Clear
Description	Review CN
Route Base Purpose	Review 🖌
Scope	 All Organization Select Scope
Route Completion Action	Notify Route Owner
Auto Stop On Rejection	Immediate 🗸
	Done Cancel

Attribute details:

- Route Nar	ne: autoname is provided	
-≪		
	Fields in red Italics are required	
Туре	Route	\sim
Name		AutoName
		\sim

- 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

Search Refinement		Search Results 1 - 11 of approx. 11 Results Page Size: 50 (Max Value: 1000) 🗰 4 🕨				
	Q 🛛	E Q. 🔈	. -	*	▦ ‰-	
By State: TRUE State: Active		Name 🔺		Revision	Description	
·	^	CN approve te	st	1	CN approve test	
 Taxonomies 		Or CN Change R	equest CM	1	CN Change Request CM Approval	
▼ Types		Or CN Change R	equest LM.	1	CN Change Request LM Approval	
- Route Template(11)	_ (CN Review Co	ntent	1	CN Review Content	
 Attributes 		Deviation Appr	oval	1	Deviation Approval	
News		BOM Approve	ł.	1	EBOM Approve	
Name	- 1	🖂 EBOM Review		1	EBOM Review	
Originated		GATE Approve		1	GATE Approve	
Modified		GATE approve	test	1	GATE approve test	
Description		MBOM Approve	;	1	MBOM Approve	
Comment		Or∰ MBOM approve	e test	1	MBOM approve test	
LABEL	~	<	>	<	C	
<	>				Su	ubmit

- 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)

Route Completion Action	Notify Route Owner	•
	Notify Route Owner	
	Promote Connected Object	
	•	

- 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)

Auto Stop On Rejection	Immediate 🗸
-	Immediate
	Deferred

The route created is not started automatically

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

est	Test for process State : Cr Owner : jor Modified : N	eate ← Evaluate → In Review a.budgeja Mar 18, 2016 3:04:23 PM	V Drop files here	ent title(
_	Properties Process Deta	nils Affected Items Cha	ange Actions Reference Do	cumen Review Rout	es Hist
_		Name 🔺	Route Status	Due Date	Descripti
	•	-@R-0000258	Not Started		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						
Fleids in red Italics are required.						
Name	Aut	toName				
Template		<u>Clear</u>				
Description				.:!		
Route Base Purpose	Standard V					
Scope	All Organization Select Scope					
Route Completion Action	Notify Route Owner					
Start Route	Upon Wizard Completion Manually					
Auto Stop On Rejection	Immediate V					
Content						
Name /	Rev	Ver	State Condition			
CR-0000163	-		Evaluate V			
				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)

🛞 10.1.68.28:8111/3dspace/components/emxRouteWizardCreateDialogFS.jsp?templateId=null&template=&objectId=7 🛛 🥐 🖛					
Step 1 of 4: Specify Details					
Add Content Remove Selected					
Fleids in red italics are required.					

Content				
Name 6	Rev	Ver	State Condition	
CR-0000163	-		Evaluate V	
				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 -		1		
□ Name ∧	Туре	Organization	Scope	Access
🔲 Barbara, Johann	Person	METHODE ELECTRONICS	All	Add Remove
Spiteri, Matthew	Person	METHODE ELECTRONICS	All	Add Remove 🗸
			Previou	s 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

Step 2 of 4: Select Route Members				
Actions -				
Add People	ӯре	Organization	Scope	Access
Add Role	Person	METHODE ELECTRONICS	All	Add Remove
Add Member List	Person	METHODE ELECTRONICS	All	Add Remove
Remove Selected				Read Read Write Add Remove Add Remove
javascript:void(0)			Previous	Next Cancel

Define tasks: select command Next

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

Step 3 of 4: Define Route Task	5	
Actions -		
Title, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
Action Comment V Order	Grima, Samantha	Image: Start Date Image: Start Date Image: Allow Delegation Image: Start Date Image: Allow Delegation Image: Start Date
Review CN Action Comment Order 1	Spiteri, Matthew	Review Clear Advanced day(s) from Route Start Date Allow Delegation Requires Owner
Review CN Action Comment Order 1	Barbara, Johann V Review CN	Review Image: Clear Advanced Image: Clear Advanced Image: Clear Advanced Image: Clear Advanced Image: Clear Image: Clear Advanced Image: Clear Image

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

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
 - 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

0	day(s) from
Route Start Da	ate 🗸 🗸

• 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	⊖Any@All
1	Review CN	Comment	
1	Review CN	Comment	
			Previous Done Cancel

- 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		
	~	🔗 Add Role
		🍖 Add Group
		🕼 Add People
		🎬 Add Member List
Properties 🕐 Remove	Ť	
Content		
□ Name ∧ Rev	Ver	State Condition
CR-0000163 -		Evaluate ¥
<		>
		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

Content Collaboration	Properties P	Process Details Affected I	tems Change Actio	ons Referen
Impact Analysis		Name _	Route St	ted

The page with route details contains several tabs:

R-0000258 CN Review Co Route	ontent Owner : joe.bud Modified : Mar 1	Igeja 8, 2016 3:35:47 PM		
R-0000258	Properties Cor	ntent Access Discussions History		
	Name	R-0000258	State	Not Started
	Owner	Joseph Bugeja	Scope	Organization
	Description	CN Review Content	Template	🖷 CN Review Content
	Originated	Mar 18, 2016	Route Base Purpose	Review
	Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate
	Tasks (Graphical) R-0000258 : Tasks (*	Tasks (Graphical)		

- 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

 Collaboration and Approvals 	Tasks Approv	/al Tas	ks Pr	ojects Iss	ues Approval Is	ssues My Calendar		
Home Change								
Management User	Name ▲			Title		Instructions	Due Date	Ту
Home Engineering User		_	-	17.0000474			0.101.0015	
Home Project User					CR-0000117	Provide Change Request Inf	Oct 31, 2015	Co
Home								
Issues Summary								

Using tab Engineering Details (or Supplier or Process Details, depends on the type of change), user is able to enter information related to costs and impacts

Drop Images here CR-0000128	st 1+	Test En	gineering Change	State : Evaluate Owner : Test Everything Modified : 12/14/2015 4:26:32
CR-0000128	Prope	erties	Engineering D	etai Affected Items »
Content			🗔 😪 🕺	÷-
Collaboration	Supplie	er Details		
Impact Analysis	Owner		Test Everyt	hing
	Custom	er Name		
	Risk Assessment		FALSE	

Using tab Reference Document, user is able to upload documents

	Pr	ор	ertie	es	E	Engineering Detai Affected Items Reference Documen			Review >>					
/														
		8	-	N	lame	۵	Title	Rev	Ver	Туре	Actions	Description	State	
		0/1		D	DC	C-0000091	Doc Eng Impact	0	1	Document	M 🕹 🔂 🕞	Document with Engineering impact analysis	In Work	곦

User has to complete the task:

- Select the task and select Complete icon

Version	8	Date:	30-April-2016	
Status	Template			56



- 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
	Done Cancel

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

Ti	Tasks/Signatures Approvals										
	State	Assignee	Task/Signature	Task Title	Comments/Instructions						
	Create										
	Evaluate	Matthew Spiteri	🗹 IT-0000171	IT-0000171	Engineering impact analysis document uploaded						
	Evaluate	🗘 Samantha Grima	🗹 IT-0000172	IT-0000172	Doc uploaded						
	Evaluate	🗘 Johann Barbara	🗹 IT-0000173	IT-0000173	New timing plan uploaded						
	Evaluate	🆨 Michael Mizzi	🗹 IT-0000174	IT-0000174	Doc uploaded						
	In Review										
	In Process CO										
	Complete										
	On Hold										
	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		Engineering Detai	Affected Items Reference Doc	umen	R	eview Route	s History	Images	
Ac									
•	•	а <mark>ф</mark>)	Name 🛆	Title	Rev	Ver	Туре	Actions	Description
•	0/1		DOC-0000091	Doc Eng Impact	0	1	Document	۵ 🛓	Document wit
◄	0/1		DOC-0000092	Doc Manufacturing Impact	0	1	Document	۵ 🛓	Doc Manufact
✓	0/1		DOC-0000093	LM Impact	0	1	Document	🔊 🛓	LM Impact
◄	0/1		DOC-0000094	Logistic impact analysis	0	1	Document	2	Logistic impac

Select Download from Actions menu



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

You have chosen to	open:					
🔒 Doc Eng Impa	🚹 Doc Eng Impact.zip					
which is: Com	pressed (zipped) Folder					
from: http://1	0.1.68.28:9090					
What should Firefo	x do with this file?					
○ <u>O</u> pen with	○ Open with Windows Explorer (default) ✓					
Save File						
Do this <u>a</u> utomatically for files like this from now on.						
	OK Cancel					

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

Drop images here CR-0000101	Change for new customer est specification	Create Evaluate In Review Owner : Test Everything Modified : 4/21/2015 11:42:26 PM	Drop files here
CR-0000101	Properties History	Images	×××
Content	🗔 😪 🔆 -		
Collaboration	Severity Low		^
Impact Analysis			
	Reviewers and Approvers		
	Evaluation Reviewers List	<u>Clear</u>	
	Evtended 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) 🗰 4 1 🕨 🗰							
Rev	Description	Availability	Organization				
1	Review CN Complete	Enterprise	METHODE				
1	Review CN	Enterprise	METHODE				
1	Review EBOM	Enterprise	METHODE				
<			Submit				
	8 Results Rev 1 1 1 1 1 1 4	Results Page Size: 50 Image Size: 50 Image Size: 50 Image Size: 50 <td>Results Page Size: 50 (Max Value: 1000) Image: Imag</td>	Results Page Size: 50 (Max Value: 1000) Image: Imag				

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 Chan	ge Orders	Projects			
	name rev revision: Structure	View Filte	er:Active			
⊡ [Blank] (1)		-		7 🔮 🗏 💸	₹	
Estimated Completion	□ Name	🏠 Est	imated Completion 🗸	State 🖓	Description	Тур
[Blank] (1)	🗆 📸 CR-0000117			In Review	Change Index component	Eng
 State Create (3) Evaluate (1) In Process CO (4) In Review (1) 						
 Type of Change notice Engineering (1) 						
Status EC Affected Items						
Launch (1)						
▼ Owner						
Robert Debono (1)						
▼ Last Modified						
Oct 29, 2015 (1)						
Reset Close	< >	<				

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

Properties Eng	ineering Detai	Affected Items	Reference Documen	Review	Routes	History	Images
🖎 🖹 🔊 🖻	📮 🗟 🔆 -						
Basic							
Change Coordinator	Robert Debono				Owner		Robert Debono
Change Details and R	Related Information						
Change Notice Type	Engineering				Status Affect	cted Items	Launch
Category of Change	Product Improvem	ent			Severity		High
Description	Change Index com	ponent			Reason for	Change	New component
Duration Alert Days	5						
Reviewers and Appro	overs						
Evaluation Reviewers List	CN: Approve Chan	ge Request			Distribution	List	
	Alexander Galea Samantha Grima	a 🇘 Michael Mizzi a	🗘 Johann Barbara				
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

Э	Cancel Change Request
	Review Affected
	Fields in red italics are required
^	Vvarning 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.
^	Reason
	Change request is superseded
~	
nt	
Cł	
~	Done Cancel

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



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
Done Cancel

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

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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

		modiliou : Torzorzo to ola		4 Reference Bocamento			
Properties Engineering Detai Affected Items Reference Documen Review Routes History Images							
	Name 🔺	Route Status	Due Date	Description	Owner	State Condition	
•	₩ <mark>₽</mark> -0000158	Finished	Oct 31, 2015		Robert Debono	Evaluate	F
•	•@Route_R-000015	Started		Review CN Complete	Robert Debono	In Review	Þ

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	L
Approval	⁽²⁾IT-0000106
Comments	Change request approved
Action	 Approve Reject Abstain
	Done Cancel

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.

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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

	CR-000002	Properties	Process Details	Affected Items
	Content	🔊 🖻 🎞	🚱 🔆 -	
	Collaboration	Duration Alert	5	
	Impact Analysis	Connected RFQ		
		Reviewers and A	pprovers	
		Evaluation Reviewers List	CN approve test	
			🗘 Joseph Zammi	t
t				
		Extended Attribute	25	
		Originated	Apr 9, 2016	
		Estimated Start		
		Actual Start	Apr 9, 2016	
		Desponsible Organization	METHODE ELES	TRONICS
		Related CO	CO-0032461	/

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

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

00148	Properties Relate	d Projects Prerequisites	Affected Items	Change Actions	Reference Documen	Review Routes	History	Images
	🔊 🖻 🎞 😫	- *						
	Basic							^
s	Owner	Robert Debono						_
	Change Details and Re	elated 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 componen	t	
	Reviewers and Approv	/ers						
	Formal Approvers List							
	Extended Attributes							
	Originated	Oct 29, 2015			Modified	Oct 29, 2015		
	Distribution List				Estimated Completi	on Nov 30, 2015		~

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

CO-0000148 Content	Affected Items Candidat	e Items Resolved Iter	ns » ⊭ ⁷	Change Actions	
Collaboration Impact Analysis	□ Name ▲	Type Rev Requested	Change Co State	□ Name ▲ □ @ CA-0000157	Type CA State A CA Eff
	453052	For Rev	Releas		

Change Order implementation: project definition

Select Related Projects	s tab			
L	already on ATL3 and ATL5 to	M	lodified : /	Apr S
CO-0032461	Properties Related Proje	cts	Prereq	uisit
Content	* * =	0		V
Collaboration	Name		Current	Phas
Impact Analysis		-		

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)

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- 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			
⅔-				
	Fields in red italics are required			^
Project Template	<u>Clear</u>			
Questions	No question to responc	Predict Schedule	Preview	
Name	AutoNa	ame		
Туре	Project Space	Project Date	Oct 29, 2015	
Description				
Copy Options	✓ Financial Data ✓ Folders	Resource Template		
Project Scheduling				
Schedule From	Project Start Date	Default Constraint	As Soon As Possible 💌	
Related Info				÷
			Done Canc	el

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

Search Refinement	Sear	ch Results 1 - 8 of ap	prox. 8	Results Page S	ize: 50	▶ (Max Value	:: 1000) ₩ ◀ 1 ▶ I
Q 3) (<u>+</u>	Q- 🕒- 📑- [•	📑 📲 🗐	*⊀			
State: Active	Name	•		Current Phase	Туре	Status	Owner	Estimated Finish D
 Taxonomies 	0æ	APQP - Template		Plan and Defi	Proj	Active	Test	Nov 20, 2015
▼ Types	02	Bought-In Tool - Template		Tool manufac	Proj	Active	Test	Dec 28, 2015
	0¢	CN Engineering Template	Ę.	Administrativ	Proj	Active	Test	Aug 19, 2015
	ിൽ	CN Process Template	F.,	Administrativ	Proj	Active	Test	Aug 17, 2015
 Attributes 	ിൽ	CN Supplier Template	5	Administrativ	Proj	Active	Test	Aug 17, 2015
Name	ിൽ	PDPLS - Template		PLS PHASE	Proj	Active	Test	Nov 16, 2017
Originated	02	PDPLS - Template Splittee	ł	PLS PHASE	Proj	Active	Test	Dec 26, 2017
Modified	ിൽ	RFQ - Template	F .,	Estimation	Proj	Active	Test	Jul 17, 2015
Description	<	>	۲					>
Comment	,							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

Drop images here CO-0000136	Improve production for PCB revision	State : Prepare → In Work Drop files here Owner : Test Everything Prop files Modified : 5/13/2015 5:43:02 PM
CO-0000136	Properties Related P	Projects Prerequisites History Images
Content	Create	3 · 🗊 · 📄 📲 🖉 🏹 😫 🎘 ·
Collaboration	□ Name	Current Phase Type ▲ Status Owner Estimated Finish Date
Impact Analysis	🗆 📝 EC-0000136	Administrativ Projec Create Test Aug 17, 2015

EC-0000136	Activities Estima Gantt Chart Phase Ga	te View										
Collaboration	Actions - Edit - Type No	💿 🥒 📮		🔍 -	I 📃 🖉	1 💎		\$∕~-				
Details										Estimated		
Execution	🗌 Name	Туре	ld 🔺	Dependency	Ð		State	%	Progress	Duration	Start Date	End Date
Experiments		Project S					Create	0.0		69.0 Davs	May 13, 2015	Aug 17, 201
Financials	Administrative and Coordination Effo	t Tack	1		0		Create	0.0		1.0 Dave	May 12, 2015	May 12, 201
Folders		Idak			v		oreate	0.0		1.0 Days	Way 13, 2013	May 13, 201
Objectives		en Task	2		0		Create	0.0		0.0 Days	May 13, 2015	May 13, 201
People		to Task	3	2:FS+1.0 d	0		Create	0.0		0.0 Days	May 13, 2015	May 13, 201
Schedule	$\blacksquare \Rightarrow \square$ \heartsuit Components/Switches Affected	Task	4		0	٠	Create	0.0		1.0 Days	May 14, 2015	May 15, 201
	- → □ 🖄 Initial Process Review	Task	5		0	٠	Create	0.0		1.0 Days	May 14, 2015	May 15, 201
	→ □ ⑦ Review stock coverage	Task	6	3:FS+1.0 d	0	٠	Create	0.0		0.0 Days	May 14, 2015	May 14, 201
	→ □ ⑦ SK Drawing to order samples	Task	7	6:FS+1.0 d	0	٠	Create	0.0		0.0 Days	May 15, 2015	May 15, 201
	- → □ 🖄 Modular Change Elements	Task	8		0		Create	0.0		67.0 Days	May 13, 2015	Aug 13, 201
	→ □ ♥ Change of PBB	Task	9		0		Create	0.0		20.0 Days	May 22, 2015	Jun 19, 201
	$\blacksquare \rightarrow \square$ 🕑 Change in led colour	Task	10	7:FS+5.0 d	0		Create	0.0		0.0 Days	May 22, 2015	May 22, 201
	C . C Paralina of sociologoa	T	**	10-56710 0 4	0		Croato	0.0		0 0 D	L F 204F	
Version	8		C	Date:				30-	April-2	2016		7
Status	Template										68	

Add an existing project

Search Refinement		Search Results 1 - 8 of app	prox. 8 Results Page Size: 5	D) (M	lax Value: 1000)	10 1
	Ø	🔄 🔍 - 👞 - 🕎 - 🚺	🗉 - 🔜 🗮 🔆 -			
Taxonomies	^	Name 🔺	Description	Status	Project Owner	Created
▼ Types		ExpRJ-000002	P1	Active	joseph.zammit	Apr 6, 2
🖻 🔲 Project Management(8)		ExpRJ-000003	Project PDPLS 1 With De	Active	Johann	Apr 6, 2
B Project Space(8) C Experiment(2)		🗌 🎽 luca_test_01-02	luca test for days count	Create	joseph.zammit	Feb 29,
		🗌 🎽 P1	P1	Active	joseph.zammit	Oct 15,
 Attributes 		DPLS 1	Project PDPLS 1 With De	Active	Johann	Apr 5, 2
Name		PRJ-0000001	Test with autoname	Create	Johann	Apr 5, 2
Originated	(💟 🔌 PRJ-0000004	CN part 56946	Create	jessicac	Apr 7, 2
		🗌 👔 re-assignment test	re-assignment test	Assign	joseph.zammit	Mar 15,
Modified						
Description			<		\frown	>
< >	~		-		Submit C	ancel

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

PRJ-0000004	Activities Estima Gantt Chart Phase Gate Vie	w						
Details	Actions - Edit - Type Task V No 1 V	📰 📲 😣	/ 🛃 👼	🔂 - 🗖	• 📰 • 📖	27 🛒	-≪	
Execution								Con
Experiments	Name Name	Type I	d - Dependency	Ð	6	State	% Progress	s Con
Folders	- 💟 🎓 PRJ-0000004	Project S			0	Create	0.0	As S
People	□ → □ 2 Administrative and Coordination Effort Rel	Task	1	0	0	Create	0.0	Δe (
Schedule		1 dok		0	0		0.0	AS C
Issues	A state of the second secon	Task	2	0	0	Create	0.0	As \$
Members and Roles	☐ → ☐ ♀ Change management effort requered to r	Task	3 2:F\$+1.0 d	0	0	Create	0.0	As \$
		Task	4	0	0	Create	0.0	As (
	🛨 🕈 🔄 🕑 Initial Process Review	Task	5	0	0	🔶 Create	0.0	As \$
	→ □ ☑ Modular Change Elements	Task	8	0	0	Create	0.0	As \$
		Task	9	0	0	Create	0.0	As \$
	< >	<						

Disconnect an existing project

Select project to disconnect and select icon Disconnect

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

·····	
CO-0032461	Properties Related Projects
Content	💽 🖓 🚟 📮 🛄 · 📑
Collaboration	
Impact Analysis	PRJ-000004

The user has to confirm the disconnect

You have chosen to remove the selected items from this list.	Removing an item from a list does not delete
The item from the database. To continue with the removal, clic	k OK. To cancel the removal, click Cancel.
	OK Cancel

10

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

 Collaboration and Approvals 	Change Requests Chan	ge Orders Cha	nge Actions				
Approvais	name rev revision: Structure	View Filter:Pendin	g				
Home Change Management User	📑 📑 - 📰 -	📖 🙋 💎 🔮	l 🗐 🔆 -				
Home Engineering User	Name	Туре	State	۵	Responsible Org	Assignee	Affected I
Home RFQ User							
Home	CA-0031413	Change Acti	Pending	Ŷ	METHODE EL	Evan Stringos	45305
Issues Summary							
Change Originator	has to select comman	d Transfer Ow	vnership				
	Modified : Apr 9	2016 5:30:18 P	м ч				
CA-0031413	Properties S	ummary View	Related CAs				
Content	1 🛛 🖉	0 🗔 😡	%-				
Collaboration	Information and Sta	atus					
Related MCOs	Messages						
Manufacturing	Status	Ŷ					
Responsibi							
	Basic						

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
🗟 🄆 -
Fleids in red Italics are required
Warning : This operation cannot be reversed except by the new owner.
New Owner
Evan Stringos <u>Clear</u>
Transfer Reason
Change Assignee
\frown
Done Cancel

The Technical Assignee receives a notification about Change Action ownership

The new Change Action ha	Mail Properties				
Attachments	Actions -				
4	From	Matthew Spiteri			
	То	Evan Stringos			
	CC				
	Subject	The new Change Action has been assigned. The new Change Action CA-0031413 - has been assigned to you.Change Action CA-0031413 -			
	Message	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:

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- 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

here	Owner . evans			here		
i	Modified : Apr 9, 20	16 5:53:45 F	PM			
CA-0031413	Properties Sum	mary View	Related	CAs History	Images	≫ ≝
Content	📮 🗟 🔆 -					
Collaboration	Work					
Related MCOs						
Manufacturing	Details					
Responsibi	METHODE ELECTRON		Category of Change	Unassigned	~	
;	O-0032461		Governing CR	CR-000002		
	Approvers					
	Evan Stringos	<u>Clear</u>	Senior Assignee	Matthew Spiter	i	Char
		<u>Clear</u>				
-						-
	utes					
	Apr 16 2016	Clear	Actual	Apr 9, 2016		
	<				\frown	>
				(Done	Cancel

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)

•	•	
CR-0031413 Ghange Action	State : in Work ← in Approval → Complete Owner : matthewspiteri Modified : Apr 9, 2016 6:13:34 PM	
CA-0031413	Properties Summary View >>	Review Routes
Content	🔊 🖻 🗔 🔮 🔆 ·	Lifecycle 2 ² A
Collaboration	Information and Status	 CA-0031413 rev -: Lifecycle
Related MCOs	Messages	
Manufacturing	Status 🔶	
Responsibi		I Promote
1	Rasin	a Demote

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 new Change Action	Mail Properties				
	Attachments	Actions -				
		From	Evan Stringos			
		То	Matthew Spiteri			
		CC				
		Subject	The new Change Action has been assigned.			
4			The new Change Action CA-0031413 - has been assigned to you.Change Action CA-0031413 -			
		Message	Transfer Comments: "Change Assignee" Change Action CA-0031413 -			
		Received	Apr 9, 2016			

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)

CR-0031413 State : In CR-0031413 Owner : ma Change Action Owner : ma Modified :	Work 4- In Approal Complete Tathewspiteri Apr 9, 2016 6:13:34 PM			
CA-0031413	Properties Summary View >>	Review Routes		 Ø
Content	N 🖻 🗔 🔇 🇞 ·	Lifecycle		27 ^
Collaboration In	formation and Status	▲ CA-0031413 rev -: Life	cycle	
Related MCOs N	lessages		- 2	
Manufacturing S Responsibi	tatus 🔶	E Promote		A Complete
(asic	1 Demote	In Approval	Complete
CA-0031413 rev -:	Lifecycle	Complete On H	old Ca	
<				
Version	8	Date:	30-April-2016	
Status	Template	1		73

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

CR-000002	Properties Process Details Affected Items Change Actions Reference Documen Review Routes Histor
Content	Lifecycle
Collaboration	CR-0000002 rev -: Lifecycle
Impact Analysis	≡- 🔽 🏥 📮 🔆-
ſ	Create Evaluate In Review Complete On Hold On Hold

The Change Order state is Complete

CO-0032461	Review Related Projects Prerequisites Affected Items Change Actions >>
Content	Lifecycle
Collaboration	CO-0032461 rev -: Lifecycle
Impact Analysis	
	Prepare In Work In Approval Complete Implemented On Hold

Affected Items revised

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

- Technical Assignee has 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

-									
Collaboration and	Change Requests Change	ge Orders Cha	nge Actions						
Approvals	name rev revision: Structure	name rev revision: Structure View Filter: Pending							
Home Change Management User	iange nent User 📮 📑 - 📰 - 📰 🖉 🏹 😪 🗐 🔆 -								
Home Engineering User	Name	Туре	State	۵	Responsible Org	Assignee	Affected I		
Home RFQ User		-							
Home	CA-0031413	Change Acti	Pending	÷	METHODE EL	Evan Stringos	B 45305		
Issues Summary									

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 : F Owner : ma Modified : 1	Pending In Work atthew.spiteri 12/14/2015 4:59:58 PM	Drop files here			ſ	
CA-0000242	Properties	Summary View Re	lated CAs	History » "	Review Routes		×2
Content				,			, A A
Collaboration	Information	and Status		^	CB-0000242 rev -: 1	ifecucle	
Impact Analysis	Messages	and Status				necycle	
Related MCOs	Status	*			=- 🔽 🎵		
Related Planning Change					Deating	l= 10/l-	
Manufacturing Responsibi	Basic				Pending	іп ууотк	
	Name	CA-0000242	Туре	Change Action			
	Policy	Change Action	Owner	Matthew Spiteri	1		×
	Description						,
	State	Pending			Tasks/Signatures	Approvals	2 ²
Review R	outes	in Danit					
Lifecycle							Ľ
CA-0000113 re	v -: Lifec	ycle					
= · 🖌 🗋		+ ※					
Pending	→ In	Work	In Approv	al	Complete	On Hold	Can
<	-			<u>_</u>	_	_	>
Drop Images here CA-0000	e Action	State : Pending Owner : matthew.spiteri Modified : 12/14/2015 4	In Work :59:58 PM	Drop files here			
CA-0000242		Affected Items	plemented	Items Rela	ated Items Refe	rence Documen	Markups
Content	A	dd Existing 📜 📃			📃 💺 🖉 🏹	' 😪 📰 🔆 -	
Collaboration							
Impact Analysis		Name 🔺	Re	evision Type		State	Description
Related MCOs		000000560	01	₿Part		Preliminary	Index
Related Planning Cha	nge						
Manufacturing Respon	nsibi						

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

 Collaboration and Approvals 	My Parts Parts to Approv	ve My CAD Drawings	CA	D Drawings to A C.	AD Drawings to R	Electr	onic Compon
Home Change			7		×.		
Management User	Name 🔺	Туре 🕜	Rev	Description	Part Classification	1	Reject Comm
Home Engineering User	000000560	EC Part	01B	Index	-		
Home Project User							
Home							
Issues Summary							
Shortcuts							
Collections							

Step 3 Senior Design Engineer has to approve revised parts

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

 Collaboration and Approvals 	^	My Parts Parts to Ap	prove My CAD Draw	rings CAD	Drawings to A	CAD Drawing		
Home Change	change ment User							
Management User		Name 🔺	Туре	Rev	Description	Part C		
Home Engineering User)	🗆 🐜 0000000480	EC Part	00A	BAS21	-		
Home Project User		🔲 🐜 000000481	EC Part	00A	Resistors, 1k, 5%	-		
Home		000000560	EC Part	01B	Index	-		
Issues Summary								
Shortcuts								

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

۲	ENOVIA - Mozilla Firefox 🛛 🗕 🗖 🗙
	via/common/emxLifecycleApprovalDialogFS.jsp?objectId=7864.18266.1616.60780&signatureName= 🕷 💌
Approval	
Q 🔆 -	
Fields in red italics are required.	
Approval	Senior Design Engineer
Comments	Part approved
Action	Approve Reject Ignore
	Done Cancel

Step 4 MBOM Engineer has to release revised parts

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

KA VA				
Collaboration and Approvals	Parts to Release Parts to	Complete M	COs	
Home Change		7 🛃 🗒	≫ .≁	
Management User	Name 🔺	Rev Descriptio	n	End Item
Home Engineering User	000000560	01B Index		No
Home Manufacturing User				
Home Project User				
Home				

Promote the part to state Release

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

Drop Images here B Part (01B)	Index	State : Review ← Owner : matthew.spite Modified : 12/14/2015	Appro eri 5:31:	oved 25 PM	→ Released						
0000000560 01B	EBOM	EBOM Common	ME	BOM P	lant Specif	. Routing	g ۱	Where Used	Markups		
Bill Of Materials	F	Reports 🗸 🥒 🛓] [: 7	-	30 Markup	-	A 📊	Change -	*	•
Access	□ Name			*	Type 🔺	State	Rev	F/N	Qtv	U of M	Des
Equivalents									~.,		
Change Management		000000560			EC Part	Approved	01B			PCS - PI	Inde
Specs & Documents											
Related Parts											
Collaboration											
Multiple Ownership											

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 Engin object will be notified once the job is completed.	eer of the associated change
	ОК

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 Route	s History Ima
Content	Lifecycle					
Collaboration	CR-0000001 rev -: Lifecycle					
Impact Analysis	≡-⊽\$\$1⊒	⅔-				
		Create	e Evaluate	: — C→ In Review —	S → In Proces	Complete

The Change Order state is Complete

CO-0029528	Properties Related Projects Prerequisites Affected Items Change Actions Reference Documen Review Ro
Content	Lifecycle
Collaboration	CO-0029528 rev -: Lifecycle
Impact Analysis	≡- 🔽 📫 🙀 🔆-
	Prepare In Work In Approval Complete

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 t	to Complete MC	Os	
name rev i	revision: Structure	View Filter:Active		
	- 📑 - 🚺 -	😺 💱 🖉 🏹	😫 🧮 🔆 •	
🗌 Name		esponsibility	Affected Items	State D
🗆 🕍 MCC	D-0000074			Create
🗆 🕍 MCC	D-0000076		B 000000576	Create
🗆 🕍 MCC	D-0000080			Create
🗆 🔠 MCC	D-0000081		■ 0000000414 ■ 0000000416	Create
🗆 🕍 MCC	D-0000082		B 0000000560	Create
🗆 🕍 MCC	D-0000083		B 000000560	Create
	0-1450000			Create

Select MCO related to revised part

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

Drop Images here MCO-0000082	State : Create Owner : User Agent Modified : 12/14/2015 5:	aview 35:14 PM
MCO-0000082	🖉 h 🕅	
History	Туре	MCO
Lifecycle	Name	MCO-0000082
Affected Part Revisions	Description	
Route	Policy	MCO Standard
	Start Date	Dec 31, 2049 1:00:00 AM EET
MCO Impact Report	Target Start Date	
Related MCOs	Originator	User Agent
Related Change	Manufacturing Responsibility	Egypt
	Manufacturing Responsibility Timezone	(GMT+02:00) Cairo
	Distribution List	

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

мсо	MCO-0000082 rev : Lifecycle										
	Create → Review → Released → Implemented										
_											
Tas	ks/Signatures App	orovals									
	🗔 🖪 - 🏹 🖗	3 🔆 -									
Show:	All Approvals V App	proval Status: All	Filter								
٨	Image: Book of the second s										
	T-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 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

Collaboration and	Change Requests	Change Orders	Change Actions	(
Approvais	name rev revision: Str	ucture View Filter:In	nactive	
Home Change Management User	📾 🗙 🖻 🗔	🗐 - 🛛 🔜 - 📰	• 🔳 🛃 🐬	
Home Project Lead	Name	* Create N	ew Table View	Sta
Home RFQ User	CR-000001	✓ Inactive		Co
Home		Active		00
Issues Summary				0

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

M Change Request	Uwn	Owner : Jessicac							
	Mod	ified : Apr 8, 2016	4:09:49 PM						
CR-0000001	Properties ingir	eering Detai	Affected Items	Change Ac					
Content	🕞 🖻 🚍 🔮	**							
Collaboration	Description	Product Improve	ment						
Impact Analysis	Program/Platform #								
	Duration Alert Days	5							
	Connected RFQ								
	Reviewers and Approvers								
	Evaluation Reviewers List	CN approve test							
		🗘 Joseph Zamm	it						
	Extended Attributes								
	Originated	Apr 7, 2016							
	Estimated Start								
	Actual Start	Apr 7, 2016							
	Responsible Organization	METHODE ELE	CTRONICS						
	Related CO	CO-0029528							

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

		Modified : Apr 8, 2016	4:09:49 PM				_	
CO-0029528	Properties	Related Projects	Prerequisites	Affected Items	Change Actions	Reference Documen	Review	Routes I
Content	Lifecycle					•	\sim	
Collaboration	CO-0029528	rev -: Lifecycle						
Impact Analysis		🕻 🗖 🖾 🔆						
	C Promote		In Work	→ In Approval	Complete	Implemented Implemented	On Hold	

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

EC03 MBOM Massive Change

Purpose	Replace or remove a part from MBOMs	Status	Define
Stakeholders	Design Engineering and MBOM Engineer		
Beginning	Design Engineering searches for a part to substitute in EBOMs and MBOM	S	
Interactions	Design Engineering has to search for source part, select Where Used in Bil	l Of Materia	l command,
	select EBOMs to modify and select new Substitute part.		
End	MCOs are created for each Manufacturing Plant related to parts involved.		
Constraints	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

•			*												
Drop 000000022 Images B Part (01A)	Indexing	State : Released Owner : Corporate												<	8
L.III.J		Modified : 11/4/2015	12:26:16	PM											
000000022 01A	EBOM	EBOM Common	MBO	I Plant S	Specif	Routin	g Wi	ere Use	d Markups						
Bill Of Materials	EBOM	✓ Actions ▼	Change	- Mar	kup 👻 🤞	2 📮	. - I	a •	I 🔍 📲	27 😪	寓 💸	-			
Access			i					0.				-			
Equivalents	Name		Levels	Ĩ i ₀	ú	F/N	Ref Des	Qty	Part Mode	Related ECR	Revision	Туре	State	Description	Rel
Change Management	5	000000049	-1	h _o		60		1.0	Un-configu		00D	Part	Rele	test	EBOM
Specs & Documents	👪	000000052	-1	h _o		30		1.0	Un-configu		00B	Part	Preli	NewSwitch white	EBOM
Related Parts	6	000000179	-1	h _o		30		1.0	Un-configu		00B	Part	Rele		EBOM
Collaboration	🖥	000000011	-1	h _o		60		1.0	Un-configu		00B	Part	Rele	M1/M2 = HDSCS = Base	EBOM
Multiple Ownership Access	5	000000050	-1	h _e		60		1.0	Un-configu		00D	Part	Preli	test	EBOM
Manufacturing Details															
CMS Information															

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

000000022 01	^	Propert	ties Material Pa	rts CMS Information	Lifecycl	le Wher	e Used
Bill Of Materials		EBOM	🖌 Actions 🗸	Change - 🥒 🗔 🔒		- == -	2 📲 🕻
Access				▼ Add To		E/N	Def Dee
Equivalents		✓ Name				F/N	Rei Des
Change Management		- 🗸 👪	000000052	Existing Change Order		30	
Specs & Documents		= 🗸 📑	000000632	Thew change Order		2	
Related Parts		- 🗸 💀	000000050	Existing Change Request		60	
Collaboration		- 🗸 📷	000000019	Wew Change Request		60	
Multiple Ownership Access				 Mass Change 	J		

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

			000000022 Create Change R
5			Fields In red Italics are required
			Basic
Туре	State	Description	Type Change Request
Part	Preli	NewSwitch white	Policy
Part	Rel	Switch	Change Request
Part	Preli	test	Change Details and Related Information
Part	Create	V1/V2 = Din Bajo =	Change Notice Type
			Engineering V
			Status Affected Items
			Current Production
			Category of Change
			Customer requirement 🗸
			Severity
			High 🗸
			Description
			Massive replace
	4	> objects, 4 selected	Done Cancel

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

		mouniou . Li i i i Lo	0.0.11.001.0	
000000022 01	^	Properties	Material Parts CMS Infor	mation Lifecycle
Bill Of Materials		EBOM	🖉 Actions 🗸 🛛 Change 🗸 🕺	📮 🔒 - 🔳
Access		Mass Update	* Add	
Equivalents		Namo	🏁 Replace	
Change Management		Name	n Update	iii r
Specs & Documents		E 🗌 🔀 0000	00 Remove	3
Related Parts		■ ▼ ➡ 0000	-1	2

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 Q 2	E 🕨 - 📑 -	📑 🖓 📲	≣ ⅔-		
✓ Case Sensitive	Name 🔺	Policy Rev	Type Des	scription St	ate
Limit to 100 results	000000487	EC Part 00	Part Ind	ex R	ele 🖻
Туре	\sim				
Part					
Name					
0000*487					
Revision					
Description					
Policy EC Part Sketch Part Standard Part C					
State					
Preliminary Review Approved Release					
Originated					
	< >	<		(Submit
×					Sabilit

The system shows the proposed change

	000000022 01	^	Properties Material Parts	CMS Info	rmation
	Bill Of Materials		EBOM Actions - C	hange 🚽 🔀	
	Access		Mass Update		
	Equivalents			_	
	Change Management		Name	Levels	h.
	Specs & Documents		□ □ ➡ 000000052	-1	h _o
	Related Parts		O00000632 O	-1	
	Collaboration		🖃 🗌 🔜 😋 0000000487	-	
	Multiple Ownership		🗉 🗌 🔜 🗢 000000022	-	
1	Monufacturing Dataila		⊟ 🔲 👪 000000050	-1	h _o
	Manufacturing Details		□ □ 🔜 000000019	-1	He.
	Vendor Part Numbers				•
	01101-6				

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

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

000000022 01	Properties Material Par	ts CMS	Information	Lifecycle	Where
Bill Of Materials	EBOM V Actions -	Change 🗸	Markup 🗸	🗶 🗔 🔒-	
Access	Mass Update		🔯 Save		
Equivalents		Laurala	📾 SaveAs		
Change Management	Name	Levels	_		R
Specs & Documents	000000052	-1	h _o	30	
Related Parts	□ □ ➡ 000000632	-1		2	
Collaboration		-		2	٣
Multiple Ownership Access	□ □ ➡ ○ 000000022	-			

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
		≫
s		Fields In red Italics are required
-		Change
		Description
	Description	
	NewSwitch white	
	Switch	
	Index	
	Indexing	
	test	
te	V1/V2 = Din Bajo =	
	>	Dana
	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

Search Refinement	Search Results
Search Q 2	▶ -
Case Sensitive	
Limit to 100 results	
Туре	
Change Order Change Request	Please enter one or more values, each one
Name	separated by an enter key into the fields provided.
Revision	
Description	
Policy	

Select type Change Request and select command Select

Select Type	
beains with 🗸 * Top Level Only Fitter	
Types Change Order Change Request	
	Select Cancel

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		Sear	ch Results				Result	s: 15, 1 selecte	ed
Search	C	(🔹 - 📑	-	-	¦7≡3	≈-		
Case Sensitive		Name	•		Rev	Туре	Description	State	
Limit to 100 results	(CR-0000153		-	Change R	Replace component with	Create	^
Туре	^		CR-0000151		-	Change R	Iknadlknlkjdnfs	Evaluate	
Change Request		C	CR-0000150		-	Change R	Changing the material of	Create	
	-		CR-0000149		-	Change R	Modification to housing t	Evaluate	
Name			CR-0000147		-	Change R	Change for impor	Create	
Devision	1		CR-0000146		-	Change R	7th January test	Evaluate	
Highest By			CR-0000145		-	Change R	Matthew Spiteri's Change !	Evaluate	
State			CR-0000144		-	Change R	test 4 incomplete CR su	Create	
Description			CR-0000143		-	Change R	test4	Create	
	_	\mathbf{a}	CR-0000142	>	-	Change R	toot	Create	×
Policy	¥			-				Submit	\supset

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

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

		Create Markup
		Fields In red Italics are required
		Change
		CR-0000153 <u>Clear</u>
	Reset	Description
De	scription	Replace index
. Ne	wSwitch white	
Sv	vitch	
	dex	
Inc	dexing	
. tes	st	
• V1	/V2 = Din Bajo =	
		<u> </u>
	>	Done
_	6 objects	

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

			_	_			
		Modified + 2/22/2016 10:28:18 PM	L here)			
CR-0000154	Properties E	ingineering Detai Affected Items	Change Actio	ons Reference Do	cumen Review	Routes History	Images
Content	1 🛛 🖉						
Collaboration	Supplier Details						
Impact Analysis	Owner	Joseph Bugeja		Originated	Feb 22, 2016		
	Customer Name						
	RiskAssessment	FALSE		Customer Approval	TRUE		
	Description	Replace index					
	Affected Items						
	Name 🛆			Туре	Rev	Description	
	000000632	2		EC Part	00	Switch	
							_
	Functional Safety	FALSE		Implementation Confidence Level		Review QUALITY HISTORY	FALSE

Step 1 Select one part from Affected Items tab or Engineering Details tab

Step 2 Select command Markup contained in Bill Of Material tab

Select checkbox related to Markup and select icon Open Markup

000000632 Switch	State : Released Owner : Corporate Modified : 2/22/2016 10:18:13 P	М			
000000632 00	EBOM EBOM Common	MBOM Plant Specif	Routing W	/here Used Markups	Σ
Bill Of Materials		- 🔜 📫 🖉 🏹 😪	≣ 💥 -		
Access		Type Description	Statuc	Created	Or
Equivalents		Type Description	Status	Created	
Change Management	BMK-0000118	BO Replace index	Prop	2/22/2016 10:18:12 PM	ma
Specs & Documents					

The table contains the change proposed

* 🔊 🐰 🌉 - 🛄 - 🗄		7 🏾	*≁					Reset	Close
Name	Related Physical Title	•	Туре	Conflict Queue	Rev	Policy	F/N	Ref Des	Compo
e 🗌 👪 000000632			Part		00	EC	F	F	F
🖃 🛄 🔜 000000017			Part		00	EC	1	,	,
⊞ 🔲 🔜 🗢 000000022			Part	-	0 1	EC-	2		
e 🗖 💀 000000097			Part		00	EC	3	,	,
🖃 🔲 👪 0000000100			Part		00	EC	4	٢	٢
🗔 📑 🔿 000000487			Part		00	EC	2	,	,

Version	8	Date:	30-April-2016	
Status	Template			92

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

Drop Images here CA-0018084	State : Pending Owner : matthew.s Modified : 2/22/2010	→ In Work piteri 6 11:14:46 PM				
CA-0018084	Properties	Summary View Related CA	As History	Images	к <mark>и</mark>	Review Routes
Content	2 🛛 🔊 🛛	🗋 🗔 🕵 🔆 -				Lifecycle
Collaboration	Information and S	tatus			^	CA-0018084 rev -: Lifecycle
Impact Analysis	Messages					
Related MCOs	Status	ŵ				
Related Planning Change						Banding In Mark
Manufacturing	Basic					
Responsibi	Name	CA-0018084	Туре	Change Action		
	Policy	Change Action	Owner	Matthew Spiteri		

The system creates the new revision

Images here	n Owner : matthew.spiteri Modified : 2/22/2016 11:14:	:46 PM	
CA-0018084	Affected Items	plemented Items Relate	ed li
Content	Add Existing 🚆 🗍	I I - I - II - I	
Collaboration		Devision Trees	
Impact Analysis		Revision Type	
Related MCOs	000000632	01 B Part	
Related Planning Change		•	
Manufacturing			
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 11:3	51:26 PM							
CR-0000154	Properties Engineering De	etai Affected	Items 【	Chan	ge Actions	Reference Docu	ımen	Review	Routes
Content	📮 🛄 - 📑 - 🗐 -	. 🖉 🏹 🕻		ç.					
Collaboration	Name	Туре	CA State	٨	Governing CC	CA Effectivity	\$t 🖋 🛅	Assig	iee
	CA-0018084	Change Ac	Comp	٠	👸 CO-00185	6	û 🖉 📙	Matthe	ew Spiteri

Step 2 Select content tab, select Markup tab

here here	Modified : 2/22/2016 11	:14:46 PM			
CA-0018084	Affected Items	Implemented Items	Related Items Refere	ence Documen.	Markups
Content	Markup Actions 🗸 📘	🗐 🗍 - 🛛 👪 - 🗊	- 🔜 💱 🖉 🏹 📢	3 🗐 🔆	
Collaboration					
Impact Analysis	✓ Name ▲	Туре	Description	Status	Created
Related MCOs	EMK-0000118	BOM Markup	Replace index	Proposed	2/22/2016
Related Planning Change					
Manufacturing					

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

	·		Mudilled . 2/22/2016 11.14.46 P	an -						
	CA-0018084		Affected Items Impler	ne	nted Items Rela	ted Items	Reference Do	cumen	Marku	ps
	Content		Markup Actions 🗸 🗔		• • • •	5 📫 🖉	7 😪 🗐	` ☆ -		
	Collaboration	E	Open	h	Тура	Description		Statue		Created
	Impact Analysis	Ľ	× Delete		Type	Description		510105		created
	Polated MCOs		× Delete	BOM Markup	Replace ind	ex	Proposed		2/22/2016	
	Related WOOS		📩 Merge							
	Related Planning Change		Approve							
	Manufacturing Responsibi		🖄 Reject	1						
4	14630013151		🔏 Change Owner	ľ						
			Apply							
				1000						

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

	Modified : 2/22/2016 11:14:46 PM				
CA-0018084	Affected Items Implem	ented Items Rela	ted Items Reference	Documen	Markups
Content	Markup Actions 🗸 🗔 🗍	- 📪 📰 -	2 📭 🚫 🖓 🚷	≣ % -	
Collaboration	- 🖸 Open	Tune	Description	Ctatus	Create
Impact Analysis	 X Delete 	туре	Description	Status	Create
Related MCOs	A Delete	BOM Markup	Replace index	Approved	2/22/2
Related Planning Change	Approve				
Manufacturing Responsibi	Reject				
Kesponsibi	🗟 Change Owner				
	Apply				

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

 Collaboration and Approvals 	My Parts Parts to Approv	ve My CAD Drawings CAD D	Drawings to A CAD Drav
Home Change	Create Parts	· 📲 🛤 - 📾 - 👘	🖉 🍸 🕵 🗮 🌾
Management User	🗌 Name 🗸	Туре	Rev Description
Home Engineering	000007033	SKETCH Раг	A Housing
Home REO Liser	000007022	Sketch Part	A
Home	000000640	Sketch Part	A
Issues Summary	000000639	Sketch Part	A
Shortcuts	000000632	EC Part	01 Switch
Collections	000000626	EC Part	00 Resistors, 1k, 5%
Subscriptions	000000625	EC Part	00 Capacitors 10nF
000000000	□ ₩ 000000624	EC Part	00 Resistors, 1k, 5%

Select command Bill Of Materials

Version	8	Date:	30-April-2016
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i			Modified : 2/22/20	16 11:	22:46	PM	_ i	3				
000000632 01	^	EBOM	EBOM Comm	on	ME	BOM P	lant Specif	R	louting	Where	Used	Ма
Bill Of Materials		- R	eports 🗸 🖉	4	l	: 1	 		30 Marku	.ip 🚽 📔	2 14	
Access				_		C40	Turne		Stata	(Deur	E (h)
Equivalents					Ú		Type 🔺		State		Rev	F/N
Change Management		🛱	000000632				EC Part		Preliminar	гу	01	
Specs & Documents			0000000100				EC Part		Released		00	4
Related Parts			000000097				EC Part		Released		00	3
Collaboration			000000487	>			EC Part		Released		00	2
Multiple Ownership Access			000000017				EC Part		Released		00	1
Manufacturine Dataile												

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"

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EC04 Change Notices management

Purpose	MBOM is released; Change Notices are created; Change Notices have to	Status	Define		
	be updated and pushed to CMS				
Stakeholders	Stakeholders Change Coordinator				
Beginning	MBOM exists and is released; Change Notices are created after MCO implementation in PLM				
Interactions	Change Coordinator defines start validity date, push Change Notices to	CMS and m	naintain start		
	effectivity dates				
End	Change Notices are released				
Constraints	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.

 Collaboration and Approvals 	Change Requests Chang	ge Orders Change A	ctions CMS Chang	ge Notice						
Home	name rev revision: Structure View Filter:Active									
Home RFQ User	🖉 🗔 🔂 - 🎫 🜉	! 💎 😫 🖼 🛠 ·								
Home Project Lead	Name	Related Part	Related MCO	Related CA	Related CR	Start Date				
Home Change Management User	CN0000057		MCO-0021298	CA-0019648	1	Feb 29, 2 ^				
Issues Summary	CN0000058		MCO-0021298	CA-0019648		Feb 29, 2				
Shortcuts	CN0000059		MCO-0021298	CA-0019648		Feb 29, 2				
Collections	CN0000060		MCO-0021298	CA-0019648		Feb 29, 2				
Subscriptions	CN0000061		MCO-0021298	CA-0019648		Feb 29, 2				
	CN0000062		MCO-0021298	CA-0019648		Feb 29, 2				
	CN0000062		MCO 0021200	CA 0010640		Eab 20.0				

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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	Drop Images here CMS Change Not	ice State : Create Owner : Samantha Modified : Feb 24, 20	→ Open 16 10:51:09 AM	Ø
	CN0000051 -	🗟 🖉 🔆 -		
	History	Name	CN0000051	
	Lifecycle	Owner	Samantha	
	MBOM Modifies	Start Date	Feb 29, 2016	
	Related Parts	Notes	SWITCH :56946-09 With:56946-09	
•	Reference Documents			

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.

	Drop Images bree CMS Change Not	Stat : Creste) Open	Ø
	L	Modified : Feb 24, 20	016 10:51:09 AM	
	CN0000051 -	🗟 🖉 🔆 -		
	History	Name	CN0000051	
	Lifecycle	Owner	Samantha	
	MBOM Modifies	Start Date	Feb 29, 2016	
	Related Parts	Notes	SWITCH :56946-09 With:56946-09	
•	Reference Documents			

The user has to confirm the export



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

: System Error: #5000001: java.lang.Exception: CN Already exists in CMS.	Done.
ОК	ОК

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

					-	
 Collaboration and Approvals 	Change Requests	Change Orders	Change Actions	CMS Change Notice	\mathbf{D}	
Home	name rev revision: St	ructure View Filter:/	Active	<u> </u>		
Home RFQ User	- 🖉 🗔 - 🔜 🖓 🔇 🗮 🔆 -					
Home Project Lead	Name 🗸	Related P	art Related MC	D Related CA	Related CR	
Home Change	CN000008	9.16355-00) MCO-00191	37 CA-0031420	CR-0000006	
Management User	CN000007	550067	MCO-00191	37 CA-0031420	CR-0000006	
Issues Summary	CN000006	550069	MCO-00191	37 CA-0031420	CR-0000006	

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

					(9	ave	R	eset
I CR	Start Date	Current			N	otes			
90006	Apr 27, 2016				S	WIT	CH :1	8355	-00 4
80000	Apr 19, 2016	Create	Ар	ril		•	201	6	•
80000	Apr 17, 2016	Create	Su 27	M 28	T 29	W	Th 31	F	Sa 2
00006	Apr 13, 2016	Create	3	4	5	6	7	8	9
0005	Apr 11, 2016	Create	10 17 24	11 18 25	12 19 26	13 20 27	14 21 28	15 22 29	16 23 30
	-		1	2	3	4	5	6	7
	Apr 19, 2016	Open			S	WIT	CH :4	5305	8

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Update a specific Change Notice

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

 Collaboration and Approvals 	Change Requests	Chang	nge Orders Change Actions CMS Change Notice				
Home	name rev revision: 5						
Home RFQ User			丫 😫 画 3	×5.			
Home Project Lead	Name	•	Related Part	Related MCO	Related CA	Related	
Home Change	CN000008	1	9.16355-00	MCO-0019137	CA-0031420	CR-000	
Management User	CN0000007		550087	MCO-0019137	CA-0031420	CR-000	
Issues Summary	CN0000006		550069	MCO-0019137	CA-0031420	CR-000	

Select the icon Edit

Drop Images here CN0000008 CMS Change	Notice State : Create Owner : Saman Modified : Apr 1	State : Creste → Open Owner : Samantha Modified : Apr 11, 2016 4:35:27 PM		
CN000008 -	B 🖉 🔆 -			
History	Name	CN000008		
Lifecycle	Owner	Samantha		
MBOM Modifies	Start Date	Apr 27, 2016		
Related Parts	Notes	SWITCH :10300-00 WITh:10300-00		
Poforonon Dogumente				

Update the Start Effectivity Date and select Done

CN000008 -	CMS Change Notice CN0000008				
History	🔒 🔆				
Lifecycle		Fields in red Italics are required			
MBOM Modifies	Name	CN000008			
Related Parts	Owner	Samantha			
Reference Documents	Start Date	Apr 27, 2016			
	Notes	SWITCH :16355-00 With:16355-00			
		<u> </u>			
		Done Cancel			

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Push to CMS the Start Effectivity Date updated

The user has to select the command Update Effectivity Date

	Drop Proper here CMS Change I	Open → Clo Notice Owner : Saman Modified : Apr '	ised tha 11, 2016 4:35:27 PM
	CN000008 -	🛃 y 🔆 -	
	History	Name	CN0000008
	Lifecycle	Owr Update Effectivit	y Date htha
	MBOM Modifies	Start Date	Apr 27, 2016
	Related Parts	Notes	SWITCH :16355-00 With:16355-00
l	Reference Documents		

The user has to confirm the update

Confirm update of Effecti	vity Date in CMS?
ОК	Cancel

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

1	
System Error: #5000001: java.lang.Exception: CN Already exists in CMS.	Done.
ОК	ОК

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.

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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	Change Requests	6 Change	e Orders Cha	nge Actions CM	S Change Notice	>
Approvais		Structure Vi	Filter: Active			
Home	fidifie fev fevision.	Structure Vi	ew mennance			
Home RFQ User	/ 📮 📑 -	*	7 🔮 🗮	% -		
Home Project Lead	Name	•	Related Part	Related MCO	Related CA	Related
Home Change	CN000008		9.16355-00	MCO-0019137	CA-0031420	CR-00(
Management User	CN000007		550067	MCO-0019137	CA-0031420	CR-000
Issues Summary	CN000008	_	550089	MCO-0019127	CA-0021420	CR.00(
Chartouts	01000000		550005	100-0013137	04-0031420	010-001
Shortous	CN000005		550068	MCO-0019137	CA-0031420	CR-000
Collections		_	452057P			
Subscriptions	CN000003		453057 1.453057	MCO-0019134	CA-0031416	CR-00(
▶ Team			453058P			

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Update MCO attributes

Select the icon Edit

MCO-0019134	State : Implemented Owner : Corporate Modified : Apr 29, 2016 3:2
MCO-0019134	🖉 🖻 🖉
History	Responsible Manufacturing Unassigned
Lifecycle	Engineer
Affected Part Revisions	Responsible Senior

Change the value for attribute Modify all BOMs and select Done

	Drep Images here MCO	34	State : Implemented Owner : Corporate Modified : Apr 29, 20	16 3:22:36 PM	!) (<u></u>
	MCO-0019134	^	Edit Details		
	History		*		
	Lifecycle		TONOY	WGO Standard	,
	Affected Part Revisions		Originator	Samantha	
	Route		Manufacturing Responsibility	Malta	
٩	MCO Impact Report		Manufacturing Responsibility Timezone	(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockhol Vienna	m,
	Related MCOs		Reason For Sequence		
	Related Change		Change Change		
	Related Change Notices		isingle CN)	VES V NO	ncel
	Involved MBOMs	4			

Create new Change Notices

Select command Related Change Notices and select the icon Reset

	i here		Modified : Apr 29, 2016 3	:22:36	8 PM	
	MCO-0019134	^	🕒 🗔 - 📰 - 📗	7	')罵 💸-	
	History		Name		Start Date	Current I
	Lifecycle					
	Affected Part Revisions		CN0000003		4/11/2016 5:32:5	Create
	Route					
L	MCO Impact Report					
	Related MCOs					
	Related Change					
	Related Change					
	Notices		<	>	<	
	1 1 1100011	¥ .				

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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).



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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.

ew Filter.Active Image: Second state of the second state of t		Home
le View art Related MCO Related CA Re MCO-0019134 CA-0031416 CF		
Ie View art Related MCO Related CA Re MCO-0019134 CA-0031416 CI		Home RFQ User
MCO-0019134 CA-0031416 CF	ad Name - * Cr	Home Project Lead
	CN0000012 V Ac	Home Change
MCO-0019134 CA-0031416 CA	CN0000011	Management User
9.16355-00 MCO-0019137 CA-0031420 CF	CN000008	Issues Summary
9.16355-00 MCO-0019137 CA-003	CN0000011 CH	Management User Issues Summary

Select command CMS Change Notices, select filter Closed

Collaboration and	Change Requests	Change Orders	Change Actions	CMS Change Notice	
Approvals	name rev revision: St	ucture View Filter:	Closed		
Home			and and		
Home RFQ User		8• 🔜 V 😪	画 ※		
Home Project Lead	Name 🗸	Related P	art Related MC	CO Related CA	Related CR
Home Change Management User	CN0000A10	00000060	MCO-0019	348 CA-0031647	CR-0000008
Issues Summany					

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