Oracle Fusion Cloud SCM

Using Product Development

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons ⑦ to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

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1 Develop Products

Overview of Product Development

Product Development tracks the early development phases of products that are going to be designed or built.

Product Development uses business objects named items, documents, manufacturer parts, change orders, and change requests to build development structures that describe the assembly or product to be manufactured, or the subassembly. Change orders are used to track changes on an item, document, their structure, or on a manufacturer part that's associated with an item, with a revision attachment, or with the attributes of an item or document. Here are some business objects and features in Product Development:

- **Items and Documents** - Introduce new items or documents to the enterprise, and add information and data to them with easily defined attributes and characteristics;

- **Structures** - Gather items (with associated manufacturer parts) and documents into a structure (Bill of Materials or BOM);

- **Change Orders** - Manage change orders formally and centrally on items, documents, AML, structures, and attachments, and analyze the impact of each change;

- **Quality Issues and Actions** - Quality Actions and Quality Issues from the Quality Management work area can be carried and processed by change orders in Product Development;

- **Searches** - Find items, documents, manufacturer parts, manufacturers, and change orders with simple or advanced searches;

- **Lifecycle Phases and Item Grades** - Differentiate between items with revision-specific lifecycle phases, and with calculated item grades that help evaluate for production readiness;

- **AML** - Manage manufacturer parts with an Approved Manufacturers List (AML) that can be associated with any item or part;

- **Incorporate Pre-production Proposals** - Incorporate Concepts or Requirements from Oracle Innovation Management Cloud applications;

- **Connect to other Applications** - Connect items, documents, and change orders to Project Tasks; and,

- **Hand over to Manufacturing** - Hand over items, documents, and structures to manufacturing, and track them downstream to production and through to commercialization.

Related Topics

- Items and Documents in Product Development
- Overview of Manufacturers
- Overview of Change Orders and Change Requests
- How to Use Clipboard
- Use Tasks Panel to Manage Business Objects

Overview of Innovation to Commercialization

Product Development's functionality can be broadened by Innovation Management and Product Hub applications. The enterprise can streamline its end-to-end business processes:

- **Innovation and Proposals**: Innovation Management applications;
- **Design and early Development**: Product Development;
- **Manufacturing to Commercialization**: Product Hub.

Innovation Management

Innovation Management is a suite of Supply Chain Management applications that promotes the abilities of the enterprise to build suitable products. Innovation Management includes three compatible applications:

- **Ideas** Workspace: supports and simplifies the innovation process to create, aggregate, and review **ideas** about potential products.
- **Concepts** Workspace: supports defining a product in its conceptual phase, building **requirements specifications**, **concepts**, and **proposals**.

Product Development to Commercialization

The enterprise brings matured concepts, proposals, and requirements specification forward to become products. A product is designed and developed in Product Development, then handed over to Product Hub to be manufactured and commercialized:

- **Product Development** supports item and document creation and enrichment, and building items and documents into structures. A structure is a list of assemblies - of items and manufacturer parts - or a list of documents, both including the design and prototype of the product.

  Using change orders to formally modify items, documents, and structures, the product evolves and moves through initial development stages to readiness for manufacturing.

  Product Development helps users manage Master Organization items and documents, while Product Hub helps users manage Site items.

- **Product Hub** takes the product through stages of manufacturing to commercial release, including multiple versions, packaging, and other downstream processes. Product Hub allows the detailing-out of commercial and operational attributes, and facilitates the management of part catalogs.

Integrations

Product Development integrates with Innovation Management to help streamline product innovation, design, and development processes, and with Oracle Project Portfolio Management to manage development projects.

You can also create integrations with your Computer-Aided Design (CAD) applications to enable items, bills of material and change orders to be managed in Product Development, while continuing to manage CAD designs and data in an on-premise CAD product data management application.

To support CAD integration, web services for Changes, Items and Structures are available. You can use these services to develop integrations between Product Development and Agile Engineering Collaboration, other on-premise CAD product data management applications, or cloud-based CAD applications.

Related Topics

- Overview of Product Development

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2 Business Objects and Structures

Overview of Product Development Business Objects

You can manage the design and development of products by using the following building blocks:

- Items
- Documents
- Manufacturer parts and their manufacturers
- Structures and
- Change orders and change requests

Items and Documents

You can create items in Product Development or Product Information Management work areas to represent the parts and assemblies of a product. A document is another type of item or part, representing description or specification of items. The specific attributes of each new business object describe the characteristics of the item or document and, taken together, the particular product. In this way, item and document business objects carry the necessary technical and engineering information of the product.

Manufacturer Parts and Manufacturers

A **manufacturer part** is an item produced by a manufacturer. A manufacturer part can be related to any item designed or produced by your company.

You can add the approved manufacturers list (AML) on an item's AML tab. You can also add AML on the **Structure** tab of the item. A document may not be associated with a manufacturer part. An item which is associated with a manufacturer part and belongs to a structure will have an icon next to it on the Structure table that indicates the association with a manufacturer part.

Manufacturer parts are identified with manufacturer part numbers. Product Development requires a **manufacturer** to be created before you may even create a manufacturer part produced by that manufacturer.

> **Note:** Item grade is calculated for items only, not for documents nor for manufacturer parts. However, the configuration of item grade may allow the AML situation to be considered in the calculation of the item grade.

Change Orders and Change Requests

Change orders and change requests enable you to manage the modifications to an item in your company's design and manufacturing processes.

When a change order is used to formalize the enrichment of an item (adding and modifying item attributes) or the construction of a structure, no further modification on any scale can be effected without an additional change order. Change orders, like items, can be initiated in the Product Development or Product Information Management work areas.

Related Topics

- Overview of Manufacturers
- Overview of Structures
- Items and Documents in Product Development
- What's the difference between an engineering change order and change request?
- Overview of Change Orders and Change Requests

Overview of Structures

In Product Development, a Bill of Materials is called a structure.

When you add an item to a parent item, you create a simple structure. As items are added, the structure is always named and referred to by its top-level item.

A structure holds all the items and documents that make up an assembly or subassembly. Items and documents may be in the same structure; there's no restriction on the maximum or minimum number of either type of business object.

Any item on a structure may be associated with one or more manufacturer parts. On the Structure table, an icon next to an item indicates the presence of manufacturer parts. So, a structure populated with items will likely comprise associated manufacturer parts.

A document structure holds all the documents that make up a meaningful document, such as a specification for a product. When you add a document to a parent document, a simple structure is created. A structure of documents will be named and referred to by its top-level document. A document structure may be only one document.

3 Get Started

Information Tiles on Product Development Overview Page

The information tiles organize information about the business objects in Product Development. They help you find additional data on favorite items, change orders, and notifications approaching deadlines.

To expand an information tile, click the down arrow icon in the tile. You can then select from, and drill into the information in that tile.

My Favorite Items Information Tile

This information tile organizes items and structures that you've marked as a favorite.

The categories in the tile - **Released**, **Unreleased**, and **Obsolete** - can be similar or parallel with lifecycle phases that are used by your company. The administrator associates these categories with a lifecycle phase type used in your company. For example, your administrator can configure the design and the prototype lifecycle phases as unreleased. When you click each category, you see the items that are currently in the lifecycle phase associated with that category.

My Worklist Information Tile

This information tile filters and collects your notifications about tasks that you must act on. Click each category to see your notifications in that category. Or click the down arrow icon (View My Worklist) to see your entire worklist.

You can filter the notifications to view either pending or all notifications, and also perform actions on notifications. For example, you may be notified to review a change order, and you can approve or reject the change order from here. Actions that aren't available on a selected notification are disabled.

The calculations for the Worklist are based on the **Need-by Date** attribute.

- **Overdue Deadline**: The Need-by Date has already passed.
- **Approaching Deadline**: The Need-by Date is less than 2 days away.
- **Waiting for Review**: The Need-by Date is in 3 days or more, or not specified.

You can select the Pending option to see the changes that you must act on.

> **Note:** The commercial change orders display the approve, and reject buttons. The approval type column isn't populated for new item requests, and it doesn't have the approve or reject buttons.

My Changes Information Tile

This information tile compiles the number of change orders that you created.

- **Open** link shows all change orders in Draft or Open status;

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- **Pending Approval** link shows all change orders in Interim Approval or Approval status, which means changes are yet to be approved or rejected;

- **Approved** link shows all change orders that have been approved, and are therefore ready to be Scheduled or Completed.

To view change orders, click the View My Changes bar (or the down arrow icon). The My Changes page appears. You can use the My Changes page to perform the following:

- Create, edit, or delete change orders and change requests.

- Sort change orders based on date, number, and description.

- Filter change orders based on type, status, cycle time, date when the change was created, and so on.

Related Topics
- Lifecycle Phases in Product Development
- Overview of Change Orders and Change Requests
- Take Action on Changes
- Use Tasks Panel to Manage Business Objects

Search for Business Objects

In the Product Development work area, you can search for the following business objects: items, documents, change orders, change requests, manufacturer parts, and manufacturers. You can also perform an advanced search using operators such as Starts with, Equals, or Contains.

Search for Multiple Items or Documents

You can search for multiple items in the same search operation. Before you use this feature, you must deploy extensible flexfields.

In the Advanced Search region of the Manage Items page, use the search operator **In** to search for a list of comma-separated item numbers.

You can copy and paste values from documents, spreadsheets, or reports into the search field. Comma-separated, tab-separated, or new line separated lists are supported, and the text box allows up to 1000 characters including commas.

Related Topics
- How to Use Clipboard
- Choose Parameters for Task-Based Item Search
- Deploy Item Flexfields

Reports and Analytics

You can use **Reports and Analytics** in the panel drawer to create reports and analytics about business objects.

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Quickly view or run analytics and reports that are related to your work in the Reports and Analytics pane. With the required privileges, you can also create and edit analytics and reports here.

Use the Item Audit Trail

An audit report is the history of an item, a listing of all actions or modifications that have been made on the item.

Because the audit trail could show a complete history across all items, it's necessary to filter first for the data you need. Your search for items or documents can be restricted by Date, User, Product, Event Type, Business Object Type, and Description.

To use the audit trail, do the following:

1. Use Navigator to go to the Product Management work area. From the list of offerings, click **Product Development**.
2. From the **Tasks** panel tab, click **View Item Audit Trail**.
3. On the **Audit Reports** page, enter the search criteria, including Date, User, and product information, Event Type, Business Object Type, and Description. Also select whether you want to include child objects.
4. Click the **Search** button.

   Review the history in the search results page. To export the search results to a spreadsheet, click the **Export** icon.

Related Topics
- Watch Video: Use the Item Audit Trail

Audit Report on Change Orders

To create an audit report on a change order, open a change order, select Actions > Audit and select a status. Then open the Audit Results side tab and check the results.

The report checks for consistency in the item structure, when the change order holding the structure is moving to the Approval status. These consistency checks ensure that child items are in the same or higher lifecycle phase as the parent item; and an Approved parent item doesn't refer to a child item that's still in Draft.

The audit results either show a "no error or warning" message, or show a list of errors and warnings.

How to Use Clipboard

You can copy items and documents to the clipboard and paste them on to other items and documents or affected objects of a change order.

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Clipboard

Copy items and documents from the Favorites and Recent Items tabs available on the clipboard to speed up your work. Use the clipboard icon that appears on the Affected Objects tab and Relationships tab to copy items to the clipboard.

The clipboard contains:

- **Clipboard**: a cumulative list of multiple copied items. The most recently copied item appears at the beginning (top) of the list. The contents of the clipboard are now retained when you sign out of the application and sign back in.

- **Favorites**: a list of items that have been specified as favorites by clicking the Add to Favorites (star) icon in the item header. Click the Refresh icon to display recently added favorites; the most recently added one appears at the start (top) of the list.

- **Recent Items**: a list of items that you've visited. Click the Refresh icon to display recently visited items. The most recently visited item appears at the beginning (top) of the list.

> **Note:** The use of the clipboard is subject to security controls. If you've privileges only to search for and view items, then you can copy and paste the items but not edit them. If you don't have privileges to search for and view items, then you can't copy the items, and they don't appear on the clipboard.

You can quickly create a structure by using an item on the clipboard. Here's how the **Copy** and **Paste** actions work with the clipboard:

- In the source structure, select items or documents and use the Copy icon, or Actions > Copy. The items appear on the clipboard.

- Open the destination structure and click Clipboard on the side panel.

- Review the item (or structure) you want to copy.

- Select the items and drag (move) or use the Paste icon or Actions > Paste.

The following functionality is available when you opt in to the Retain Copied Data on Clipboard feature. It is applicable to change orders, change requests, problem reports, and corrective actions:

- The clipboard retains its content when you sign out of the application and sign back in.

- The clipboard can hold up to 500 items and you can sort the items by the date you added them, from latest to oldest.

- Select one or multiple items from the clipboard and use the drag and drop (select and move) or paste icon to add them to the Affected Objects tab, Item Structure tab, or Relationships tab.

- The selections you make on the clipboard are deselected when you:
  - add more items to the clipboard.
  - sign out and sign back in.

Points to Remember:

- Note that you must first copy the items to the clipboard, select them from the clipboard, and paste them to the Affected Objects tab or Item Structure tab.

- When you copy the items from the search results table to the clipboard, the items in the clipboard are deselected.

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- When you select items on the clipboard and move either to the Favorites or Recent Items tabs and return to the clipboard, the selection persists.

The contents of the clipboard aren't cleared out when you sign out. To remove items from the clipboard, you can select a single item or several items and click **Remove** (the X icon). Click **Clear All** to clear the clipboard.

Pages Where You Can Copy and Paste Items

Here are the pages from which you can copy items and structures:

- Change Order > Impact analysis
- Item > Item grade
- Item > Where Used

Here are the pages on which you can paste items with the clipboard function:

- Item > Structure table
- Document > Structure table
- Change Order > Affected Object > Structure table
- Change Order > Affected Object table

Copy Items from Product Development to Quality Management

Once you copy items into the clipboard in the Product Development work area, they also appear on the clipboard in the Quality Management work area. So you can copy items and paste them directly into the tables of Affected Objects or Related Objects in:

- Quality issues
- Quality actions

Note: To access this feature, you must also have the Quality Analyst (ORA_ENQ_QUALITY_ANALYST_JOB) role.

Use the Clipboard to Paste Items into a Change Order

You can use the clipboard to copy and paste items to a change order's affected objects table.

1. Navigate to the Product Development work area.
2. Open an item and click the **Structure** tab.
3. Select the row that you want to copy.
4. Create a change order in which you want to paste the item.

   o From the Tasks panel drawer, click **Create Change Orders**.

   o From the **Change Type** list, select the type of change order.

   o In the **Name** field, enter a name for the change order.

   o In the **Description** field, enter a brief description.

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○ Click **Save**.

5. Paste the items into the change order.

　　○ In the change order, click the **Affected Objects** side tab.

　　○ Click the **Paste** icon to paste the item you copied in a previous step.

Similarly, **Copy** icons in the Change-Impact Analysis and the Item-Grade tabs, enable you to select and copy multiple items into the clipboard. The **Copy** icon in the Item-Where Used tab lets you copy only a single row. Selecting a row or multiple rows activates the icon and a description of the item appears when you hover over it in the clipboard.

Related Topics
- Watch Video: Use the Clipboard

Use Tasks Panel to Manage Business Objects

You can use the Tasks side tab to create and manage business objects even when you're preforming another task on the interface.

Let's say that you're building a structure and you realize that your structure needs an item that doesn't exist. Then you use tasks side tab to create a new item and add that to the structure. You can add information to any object as you create it; or, you can save it in simple form and add more data later.

Related Topics
- View Item and Document Details
- Overview of Change Orders and Change Requests
- Overview of Manufacturers

Use Reports and Analytics

To create reports and analytics about business objects, click the Reports and Analytics panel tab.

If you have permissions, you can create and edit analytics and reports. You can also add reports and analytics from the Business Intelligence catalog.

To navigate to the Reports and Analytics work area, click **Navigator** > **Tools** > **Reports and Analytics**.

Use the work area to perform an analysis. For example, in a table or graph you can use analyses to:

- Summarize or break down simple, real-time data.
- Make short-term decisions.

Related Topics
- Creating and Administering Analytics and Reports for SCM

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4 Items and Documents

Items and Documents in Product Development

Items and documents have many features in common. Both types of business objects are derived from the same original class type. From the primary Root Item Class, the administrator may create a Root Document Class.

Additional class types may be created based on the root classes. Different class types allow different kinds of items and documents. Items created from the same item class inherit the same template of attributes. Documents created from the same document class inherit the same template of attributes.

The document business object behaves in much the same way as the item business object. A document that contains information or specification about an item or assembly can be added to an item structure. Or, a document structure could be built with documents that contain item requirements or specifications in parallel with every item of an item structure.

The differences between items and documents are:

- Documents can't be associated with manufacturer parts;
- Documents don't use the item grade function and attributes.

Related Topics
- View Item and Document Details
- Overview of New Item Requests

View Item and Document Details

An item's General Information side tab is the starting point to access its basic information. Depending on configuration and company needs, the attributes of an item might number a dozen or go well beyond a hundred.

Here are the side tabs available on items and documents:

Note:
- A blue icon indicating the presence of content appears on the side tab. Additionally, when you hover on the tab, the tooltip displays Has Content.
- Blue icons aren't displayed for those tabs that always have content, or have content calculated upon selecting the tab: General Information, History, and Item Grade.

- **General Information** - the default or cover page of an item or document.

  You can view an item's revision number and the corresponding change order from the **Revision** list on any item page. The current effective revision is marked with an asterisk (*) character.

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> **Note:**
>
>   - Canceled item and document revisions don't appear in the **Revision** list.
>
>   - Previously effective revisions of the item can't be edited.

- **Attachments** - text or graphic files, or URL, with more information about the item or document; attachments can be classified in a category. Includes revision-specific content.

- **Structure** - the Bill of Materials for assemblies, products, and other collections of items and documents. Includes revision-specific content.

- **Quality** - displays those quality issues or quality actions to which this item or document has been added. Includes revision-specific content.

- **Changes** - lists change orders or change requests that the item or document is on.

- **Relationships** - user-set association between any two business objects or structures. Includes revision-specific content.

- **Team** - users and groups who have access to the item or document.

- **Where Used** - displays those item-structures to which this item is added.

- **History** – shows data changes made to audit-enabled item attributes.

Here are the side tabs that are only available on items:

- **AML** - Approved Manufacturers List; manufacturer parts supplied by approved manufacturers are associated with items to be added to structures. Includes revision-specific content.

- **Item Grade** - notifies conditions of risk for the item.

General Information

You can view the fields that are predefined in the application, and the extensible flexfields configured by your administrator. The administrator can decide whether you can view or edit flexfields by assigning privileges to attribute groups and users. The flexfields are defined in the item classification; so, available fields are derived from the item class hierarchy and respective attribute assignments.

You can also add a thumbnail or graphical image of the item.

Here's a description of the key attributes and fields on the general information page:

User Item Type

An attribute that describes the item. For instance, Finished Goods, Freight, or Inventory Type.

> **Note:**
> - Redlines to this attribute are seen on the Edit Item page and on the change order in Simplified Change Management Interface.
>
> - If you create an item in Product Development, you can't modify User Item Type from Product Information Management.
>
> - To hide User Item Type in Product Development, use Page Composer.

Unit of Measure

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The Unit of measure attribute is used by a variety of functions and transactions to express the quantity of items. Each unit of measure you define must belong to a unit of measure class.

The administrator uses the Manage Units of Measure task in the Setup and Maintenance work area to add UOMs to the list of available UOMs.

You can update the primary unit of measure on a new item request-enabled item when it's in the Draft status. The item can be a part of a structure and you can change the UOM to any UOM. If the item is part of a structure or has a structure, once you change the UOM, save and close the item, a message informs you that the primary UOM was changed for the item and that this may affect the components in the item structure or any structure where the item is used. After you update the UOM, you must check and manually update items in any impacted structures.

> **Note:** The primary unit of measure won't be editable for approved items on new item request classes and non-new item request classes.

Created From

You can view the **Created From** attribute on the General Information page where you can see the source item from which the current item was copied. You can click the source item name to view details and navigate to the source item. You can also view the details of the **Created From** attribute in the item history. Here, if the source item is deleted, you see an ID as the attribute value instead of the item name.

In the Product Development work area:

- the **Created From** attribute displays the source item name along with the revision.

- when you click the hyperlink, it opens the specific revision of the source item from which the current item was created.

Irrespective of having access to the item, the hyperlink appears in the Created From field. If you don't have access to the source item, an error message appears when you click the hyperlink. If the source item is deleted, a message informs you that no matches were found. If the item wasn't created using Save As, the attribute value for **Created From** is blank.

Product Line Attribute

You can use this attribute to assign the item to a product line in your company. This enhances the supply chain's operational information.
To add product lines, click the plus icon. In the Assign Item to Product Lines dialog box, you can identify which product line is already assigned to an item. You can also search for a product line and sort the available lines.

Note that the product lines are available for selection here only if your administrator has set up the catalog rules for the Product Development functional area as described in the topic: *Functional Area Catalogs Rules*.
Operational Attributes

An enterprise can have hundreds of additional operational attributes for any item or product. These attributes don't need to be displayed on its main development pages, in fact, they may not become relevant until later on the path to commercialization. The administrator defines the visibility of operational attributes in Product Development work area.
You can modify the operational attributes from the Product Information Management work area. Here's how:

Open the item and click the **Specifications** tab. Operational Attributes appear in **Item Organization**.

Change-controlled Item Attributes

These attributes can only be modified through a change order.

Where Used

You can view the other item structures to which the item has been added. You can also use filters to view specific structures. Note that the following data security privileges are required to view the where used report: View Item Basic, Maintain Item Basic, and View Item Structure or Maintain Item Structure.

Here's a description of filters and fields on the Where Used tab.

Show Structure Levels: Filter items based on the level in which this item is used in another structure.

- First level: view first level of the structure in which the item is used.

- Top level: view topmost level of the entire bill of material in which the item is used.

- All levels: view all levels from the item to the topmost level in which the item is used.

Show Items: Filter items based on their approval status in a change order.

- Implemented: view items that are already effective.

- All: view items that are effective and items that are yet to go through the change order approval process.

Filter a large list of items: Use **Query by Example**. Let's say that you want to filter items by a lifecycle phase.

- Click **Query by Example**.

- Enter the filter criteria in the field corresponding to Lifecycle Phase.

Date: This is the reference date used when running the where-used query.

Let's say that the date appears as 7/18/19. Then it's the where used data as on 7/18/19. The table shows how the date differs based on the selected item revision.

Selected Item Revision	Date
Past effective	Revision end date
Current effective	Current date
Pending	Current date
Future effective	Future effective date

Include Substitute Components

Select this to identify where the item is used as a substitute component. Here are the important columns for substitutes:

- **Item**: shows the structure in which the item is used as substitute. The number of structure levels shown in the item depends on what you select in the **Show Structure Levels** filter.

- **Substitute For**: Shows the components for which the context item is marked as a substitute. Appears only if you select **First level** and **Include substitute components** filters.

Here are some additional details on substitute components:

- You can view substitute components only for first level structure in the UI and all levels in the OTBI report.

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- The component number displayed in the **Substitute For** column is read-only.

  When you click the information icon (orange triangle) on the item, a panel that includes links to item entities appears. Note that you'll only see items for which you're granted access.

- You can enable substitute component search by default using the profile option **Include Substitutes in Item Where Used Data**.

- When you select **Include Substitute Components**, the Where Used results are restricted to:

  the master organization and primary structure in Product Development, and to the context item's organization in Product Information Management.

- You can perform a search on primary, alternate, or all structures based on the search filters in Product Information Management.

- The change order details report (in Product Development) includes the following substitute component attributes: Primary UOM, Enforce Integer Requirement, Priority, and Global descriptive flexfields. The report doesn't include redlines for substitute components.

Team

At the item class level, your administrator defines users and groups who have access to items and assigns appropriate privileges.

At the item level, you can use the Team tab to add additional users and groups who should have access to the item. Note that you can't delete or modify the users and groups defined by the administrator.

History

You can view the history of data changes made to audit-enabled item attributes. Audit data is presented only for the item that you are currently viewing or editing.

When you click the History tab on an item, you see the changes made in the recent week. You can view data changes made on the following item tabs: General Information, Structure (excluding reference designators and side tabs), AML (except for preliminary items), and Security.

You can also search for audit data by a combination of criteria such as user details, the type of data change (add, update, or delete), a specific field, a specific value in a field, or a specific portion of item data such as extensible flexfields. Audit-enabled data can include operational attributes of items, item-level extensible flexfields and flexfield security, item structures, and item structure components. You can also access this data from Navigator > **Tools** > **Audit Reports**.

To see more details in search results, you can select the following:

- **Show User-Related Details**: Shows the user ID in addition to the user name.
- **Show Attribute Details**: Shows the actions that were performed on the attribute (created, updated, or deleted), along with old and new values.
- **Show additional object identifier columns**: Shows additional columns for Context Name and Context Value, to indicate each unique context in which the item is used. For instance, if you add a component to the structure, then the **Context Value 2** column shows the component that was added (if the check box is selected).

Additional information:

- The History tab is available only if your implementor has assigned you the appropriate privileges.

- To view audit data, your audit policy must include the item data attributes that you want to audit. Audit policies are set up using the Manage Audit Policies task in the Setup and Maintenance work area.

Related Topics

- Overview of Structures
- Why am I unable to view the Substitute For column in the structure details?
- Manage Attachments in Items and Change Orders
- Relationships in Items and Documents
- How Item Grade is Calculated
- How Units of Measure, Unit of Measure Classes, and Base Units of Measure Relate to Each Other

Find Attributes on Item Page

You can search for extended flexfield attributes on the item or document page even when the attribute groups are collapsed. You can also find the next attribute that matches your search criteria.

This is useful when you have to find and edit specific item attributes in items and documents that have a large number of extended flexfields. You can also choose to keep attribute groups collapsed by default to ensure faster loading of item and document pages.

Note:
- To keep attribute groups collapsed by default, your administrator must configure the value for the item profile option ACA_ITEM_EFF_DISPLAY to **Collapse All** using the Manage Administrator Profile Values task (in the Setup and Maintenance work area).
- The search doesn't mark up Unit of Measure type attributes in a different color and style.

Here's how you find extended flexfield attributes:

1. Enter the text pattern you're looking for in the **Find attributes** field on the item or the document page, and click the **Next** button.

   Note: Pressing **Enter** won't start the search.

   The attribute matching the text pattern appears in a different text color and style for easy identification.
2. To view the next matching attribute, click **Next**.

   The page automatically scrolls to show you the next attribute that matches the text pattern.

   If a matching attribute is found within an attribute group that's currently collapsed, the group is expanded to show you the attribute.
3. To edit the attribute, move the cursor to the attribute field.
4. To navigate through the attribute search results, click the **Previous** button adjacent to the search field.

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Take Action on Items and Documents

Here are the actions available on items and documents:

- **Assign to Change Order** or **Assign to Change Request**: quickly assign the item or document to a new change order or change request.

- **Save As**: create an item or document from the one you're working on.

  The primary unit of measure and item attribute values are copied from the item you're working on; you can modify these values in the **Save As** dialog box.

  The item lifecycle phase is copied from the template defined in the item class. Note that this value is unavailable in the **Save As** dialog box.

- **Delete**: mark an item for deletion and add it to a delete group. You can create a new delete group or add the item to an existing group.

  To confirm the item deletion use Manage Delete Group available in the Tasks panel. The item must meet the deletion constraints so that it's not used in any structure or change order.

  In case you want to again use the item and it can't be deleted due to constraints, you must restore the item.

- **Send Object**: send a message about the business object to another user.

  Messages displaying the list of recipients can be sent to a single or multiple users. This feature works for items, documents, and change orders.

- **Generate Report**: generate an item structure report that displays the main attributes of component items as well as descriptive flexfields and AML. You can configure the attributes that you want to display in the report template.

  Note:
  - To generate item structure report, you will require the following roles:

    BI Consumer and

    EGO_GENERATE_ITEM_CHANGE_ORDER_REPORT_PRIV_OBI.
  - You can generate the report only in Product Development or the Product Information Management work area and not within Oracle Analytics Publisher. Note that the template is configured using Oracle Analytics Publisher.

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- **Download Attachments**: download item and manufacturer part attachments for either first or all structure levels. You can choose from options and specify which attachments you want to include in your download when you select **Download Attachments** from the **Actions** menu of a change.

  If you choose **Single** level and select **Include manufacturer part attachments**, then the root item's attachments including its manufacturer part attachments are downloaded.

  If you choose **All** levels and select **Include manufacturer part attachments**, then the item and its structure attachments including manufacturer part attachments at all structure levels are downloaded.

  > **Note:**
  > - You can only download attachments for the manufacturer parts for which you have permission to access.
  > - Downloaded attachments appear in Zip files with subfolders showing the item structure hierarchy. You can find manufacturer part attachments in the AML subfolder.

- **View Reports**: view the configured Oracle Transactional Business Intelligence (OTBI) reports for the item.

  You can search for specific reports or view the configured reports. You can also view specific context options such as Structures, Where Used, AML, and more.

- **Publish for Analysis**: publish the structure and where used data for analysis in Oracle Transactional Business Intelligence (OTBI).

  To publish data for analysis, click **Actions** > **View Reports** > **Publish**.

  > **Note:** Ensure that all users who need to publish data for analysis have the View Product Management Reports (ACA_VIEW_PRODUCT_MANAGEMENT_REPORTS_PRIV) privilege to view reports. This is true for suppliers as well, if you intend to have them run scheduled processes for structure and component reports directly in OTBI or through the Reports and Analytics side tab.

- **Create Quality Issue**: a quality issue is a defect, deficiency, or a significant variation in an item's expected appearance or performance.

- **Create Quality Action**: a quality action is a necessary activity required to mitigate a quality issue and prevent its further occurrences.

> **Note:**
> - The availability of an action depends on your privileges and the administrative setup.
> - Some of the tasks can also be accomplished from other user interface components.

This action is found only on items (not documents):

- **Refresh Cost**: retrieve the latest costs for the item or structure, and to perform the cost rollup.

Related Topics

- Use Tasks Panel to Manage Business Objects
- Manage Attachments in Items and Change Orders
- Overview of Change Orders and Change Requests

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Review Item and Document Changes

The Changes page contains two subcategories, Pending and Released. When you click the Changes side tab of an item, the Item Changes and Structure Changes tabs appear. They display either the Pending Changes or Released Changes in a table format.

The Item Changes tab displays the pending change orders and change requests of the item. The Structure Changes tab displays the pending change orders across all the items in all the revisions in the structure.

Pending Changes

Displays change orders and change requests that are in the following status: Draft, Open, Interim Approval, Approval, Hold, and Canceled. To view canceled change orders, you must select **Show Canceled Changes**.

Released Changes

Displays change orders that are in the Scheduled, and Completed status.

When to Use Change Orders

Manage item revisions by submitting the item for approval by a change order. Attachments and AML must also be modified through a change order. You can't directly modify a manufacturer or an attachment.

Related Topics

- Create a Change Order and Submit it for Approval

Lifecycle Phases in Product Development

Lifecycle Phases are used as an indicator of the stage for an item or document during the design and development process. Each phase represents a set of standard tasks or deliverables that are required before promoting an item to the next phase.

Each item or document must have a lifecycle phase associated with it. An object from a given class can be assigned to any of the lifecycle phases associated with that class. Before you can create or import items or documents or structures, the appropriate lifecycle phases must be created and assigned to the class used to create that object or structure (or to a parent class of the class used to create the object). When a business object is assigned to a lifecycle phase, that phase is visible as part of the object's attributes. In item or document structures, lifecycle phases name specific processes that are somewhat different - or in any case named differently - than the phases for the objects on the structure.

Four lifecycle phase types are predefined in the application:

- Design;
- Preproduction or Prototype;
- Production;
- Obsolete.

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To change the lifecycle phase of an item, you must assign it to a change order. You can also reinstate the lifecycle phase from obsolete to an earlier one.

The administrator can create names for the lifecycle phases that are particular to your company's processes. There can also be multiple phases based on the same predefined phase; for example, the predefined Production phase can be split into phases named Production and In Manufacturing, each having company-specific meaning in the steps to build and ship products.

Related Topics
- Create a Change Order and Submit it for Approval

Considerations for Lifecycle Phases and Effective Dates

When you change the lifecycle phase or effective date, some restrictions apply.

Restrictions on Promoting Lifecycle Phase

In an item structure containing child items created in Product Development and Product Hub, there's a restriction when promoting the item lifecycle phase. On promoting the parent item, the application restricts promotion of Product Development items. However, Product Hub items are automatically promoted.

For example, consider the following item structure that includes items in the Prototype lifecycle phase:

Item-1 (created in Product Hub)

- Item-2 (created in Product Development)

  - Item-3 (created in Product Development)
  - Item-4 (created in Product Development)

- Item-5 (created in Product Development)

- Item-6 (created in Product Hub)

  - Item-7 (created in Product Hub)

On changing the lifecycle phase of Item-1 from Prototype to Production, here's what happens:

- Lifecycle phase of child items created in Product Development remains unchanged.

- Lifecycle phase of child items created in Product Hub changes to production.

Restrictions on Demoting Lifecycle Phase

In an individual item, the application restricts demoting the item lifecycle in the following scenarios:

- Production to Design

- Production to Prototype

- Prototype to Design

Restrictions on Future Effective Date

If you set a future effective date for an item in the design lifecycle phase, the application prompts you to select whether you want to change the effective date or retain it. Note that the best practice is to make the item effective on approval. A future effective date might initiate a complex process after the item approval.

Related Topics
- Can I change the lifecycle phase on an obsoleted item?

How Item Grade is Calculated

The Item Grade side tab displays the Item Grade page. The application computes a temporary grade for the item, using standard rules from the industry.

Documents or manufacturer parts don't support the Item Grade function.

Grade Items in Risky Conditions

Grading is computed for all the Items from the entire item structure. It takes into account certain risk conditions of the item and its structure to compute the grade. Risky conditions that merit attention and modification may include the following:

- A child item at leaf node that has no approved manufacturers list (AML).
- A child item that has an unapproved manufacturer part number (MPN).
- A child item which is at a lower lifecycle than its immediate parent item or the structure's top-level item. For example, a bicycle wheel might be at the Production phase of its lifecycle, while the bicycle itself is still in Pre-production: because there are other subassemblies that aren't yet ready for Production, this is appropriate. You wouldn't want the bicycle to have achieved Production phase while its wheel is still in Design. The grade rule provides an alert on the bicycle's Details tile.

Default Rules

Grade computation can be configured to ignore or take into account any of the rules. You can select one to five of these issues to be involved in item grading:

- Lifecycle Mismatch
- Unapproved MPN
- Inactive Items
- Unreleased Items
- No AML

Standards for Grading

These are the default grading standards. The application doesn't count all the instances of violations; it counts an issue or criteria as "1 issue" no matter how many times the issue is violated:

- An item with 0 issues that has an Approved status is graded **A**.

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- An item with 1 issue is graded **B**.

- An item with 2 issues is graded **C**.

- An item with 3 issues is graded **D**.

It can also be configured to use numeric grading, so that the number **5** corresponds with the letter grade "A", **4** with "B", and so on.

Click an element on the **Item Grade** tab to discover what issues or conditions affect its grade.

Configure Action Links to Items from Reports

You can create action links (or deep links) to navigate from Oracle Transactional Business Intelligence (OTBI) reports to specific items.

1. Navigate to the Product Development work area.
2. To create an analysis, click the **Reports and Analytics** side tab and click **Browse Catalog**.
3. To create a report about items and add fields:

   ○ In the **Catalog** page, from the **New** menu, click **Analysis**.

   ○ Select **Product Management: Item Revision Real Time** from the **Select Subject Area** menu.

   ○ From the Subject Areas panel, click **Item** > **Main**. Use the scroll bar to select Item Name, Item ID, and Organization ID. Other columns of data are optional.

4. The Item ID and Organization ID don't' work with a decimal value. To set a non-decimal value for the item ID:

   ○ Click **Inventory Item ID**. From the menu, click **Column Properties.**

   ○ In the **Column Properties** dialog, click the **Data Format** tab.

   ○ Select the **Override Default Data Format** check box.

   ○ Set the value in **Decimal Places** to a non-decimal value. Click **OK**.

   ○ Similarly set the **Organization ID** to a non-decimal value.

5. To configure the name column as a URL that opens the selected object in another tab:

   ○ In **Selected Columns**, select the **Item Name**.

   ○ From the menu, click **Column Properties**. In the **Column Properties** dialog click the **Interaction** tab.

   ○ From the **Primary Interaction** menu, select **Action Links** and create a link format.

   ○ Click the + icon to add an action link.

   ○ From the **New Action Link** dialog, select **Navigate to a Web Page**.

   ○ In the **Create New Action** dialog, add the URL. This creates a web page and passes dynamic values to load the selected object. The template of the dynamic URL is:

     https://<hostname>/productLifecycleManagement/faces/deeplink? objType=ITEMS&action=EDIT&objKey=itemId=<INVENTORY_ITEM_ID>&orgId=<ORGANIZATION_ID>

     Note that:

     - Object Type is Item

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- - Action is Edit
  - - Object Key is Item ID
6. To define parameters:
    - ○ Click **Define Parameters**. The value for the object key is dynamic and the object ID is retrieved from the report data.
    - ○ Click the menu available in the **Values** column and the third row. Select **Column Value** and then select **Item ID**.
    - ○ Click the menu available in the Values column and the fourth row. Select **Column Value** and then **Organization ID**.
    - ○ To ensure that the URLs work automatically, select the **Fixed** and **Hidden** check boxes in all the rows.
7. In the **Create New Action** dialog, add the reference to **Item ID** in the **URL** field.
8. Click **Options** to open the **Action Options** window.
9. Select the **Open in New Window** check box and click OK. You return to the **Create New Action** window.
10. Click **OK**. You return to the **New Action link** window.
11. Click **OK**. In the **Column Properties** window, select the 'Do not display pop-up if only one addition link is available at runtime' check box. This helps when there are multiple links with different actions. Click **OK**.
12. Click **Save Analysis**.
13. Click the **Results** tab. Click a link in the search results and notice that the object opens in a new window.

Related Topics
- • Configure Deep Links in Oracle Fusion Cloud Product Lifecycle Management

Generate Item Structure Report

You can generate and view the item structure report from both the Product Development and Product Information Management work areas.

1. Navigate to the Edit Item page of an item.
2. Click **Generate Report** from the Actions menu.
3. In the Item Structure Report dialog, select the fields which must appear in the report.

    - ○ Levels - Single or all levels of the structure

    - ○ Columns - Main, Main and AML, All

    - ○ Templates - Default Item Structure Report. You can also include templates you've configured.

      If you're unable to view the Default Item Structure report template, ensure that you have the following role: EGO_GENERATE_ITEM_CHANGE_ORDER_REPORT_**PRIV_OBI**
    - ○ Format - Format of the file here by default is Microsoft Excel.

4. Click **Submit**.
5. Click **OK** to confirm the message which shows the Scheduled Process Request ID.
6. Navigate to **View Scheduled Processes** in the Tasks panel.
7. Enter the **Process Name** or **Process ID** and check the status of the report.
8. Click the output that appears in the **View Output** column.
9. Click the file name or URL in the **Attachments** dialog and you can view the columns and levels that you selected.

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Note:

- The columns in the item structure report only display the attributes that you have configured in the template.

- You can generate the report only in Product Development or the Product Information Management work area and not within Oracle Analytics Publisher; configuration of the template is done in Oracle Analytics Publisher.

Related Topics

- Configure the Template for the Item Structure Report with Additional Attributes
- Configure the Template for the Item Structure Report with the Main and AML Attribute

Considerations for Managing Flexfields in Items and Change Orders

Item extensible flexfields and item revision extensible flexfields are handled differently in Product Information Management and Product Development work areas.

Here's what you should keep in mind if you're managing flexfields in both work areas.

Flexfield Type	Product Information Management	Product Development
Item Extensible Flexfield	Available in items and change orders. On selecting a revision, only the current effective values appear.	Available in items and change orders. On selecting a revision, revision-specific values appear.
Item Revision Extensible Flexfield	Appears on the item page where it's configured. Appears in the change line in the classic Product Information Management work area, but not in the Simplified Change Management Interface.	Not supported. Doesn't appear in the item view or change order affected objects view.

Best Practices

Here are some best practices for managing flexfields:

- In Product Development, you can use item extensible flexfields to track different attribute values by revision when specific data isn't explicitly tracked through change control.

- In Product Information Management, you can choose not to include item attributes in change control, but still use item revision extended flexfields to track the difference in values between revisions.

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FAQs About Items and Documents

Why can't I search for items across work areas?

Sometimes you may be unable to search for items by the same criteria using the Manage Items task or unable to navigate to Item Details page from search results in either Product Development or Product Information Management work areas.

In this case, perform the Deploy Item Extensible Flexfields task in the Setup and Maintenance work area, using the Refresh and Deploy Offline option.

> **Note:** You should consult with Oracle Support before running this deployment option in other situations.

Related Topics
- Deploy Item Flexfields

How do I set the parameters used to calculate Item Grade?

Open the Tasks panel, click Manage Configurations. Select the Items tab, and make selections in the Grade and BOM Grade sections.

What's the difference between the terms released and unreleased in the My Favorite Items information tile?

It depends on the item lifecycle phase configured by your administrator.

For example, your administrator can configure the prototype lifecycle phase as unreleased, and the production lifecycle phase as released. Depending on this configuration, the My Favorite Items information tile displays the number of released and unreleased items.

Related Topics
- Configure Item, Document, and Change Management in Product Development

What's the difference between an item and a manufacturer part?

An item is produced or assembled by your company.

A manufacturer part is entirely produced by an outside manufacturer. It's identified by a manufacturer part number.

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How do I configure the display of operational attributes in the Product Development work area?

Open the Tasks panel tab, click Manage Configurations. Select the Items tab, and make selections in the Item Attributes Display Settings section.

How do you change the UOM value after an item is created?

You can update the primary unit of measure of a new item request-enabled item, in the draft status.

If the item is a part of a structure, after you update the UOM, you must check and manually update items in any impacted structures.

> **Note:** The primary unit of measure won't be editable for approved items on new item request classes and non-new item request classes.

How can I quickly edit the details of an item attachment?

On the item's Attachment side tab, click the Direct Edit icon.

How can I promote or demote an item's lifecycle phase?

To promote or demote the item lifecycle phase in Product Development, use a change order on an engineering item.

In Product Information Management, use the item page or a change order for a commercial item. On the item click **Actions** > **Change Lifecycle Phase**.

> **Note:** You can also change the lifecycle phase of an obsoleted item from update 23A onward.

Can I change the lifecycle phase on an obsoleted item?

You can change the lifecycle phase on an obsoleted item from update 23A onward. Here's how:

In Product Development, assign the item to a change order. On the Affected Objects tab, use the **New Lifecycle Phase** column.

In Product Information Management, use the item page or a change order for a commercial item. On the item click **Actions** > **Change Lifecycle Phase**.

Will attachments I add in Product Development show up in Product Information Management?

The attachment you add for an item Product Development is visible in Product Information Management only if the Product Development item is in a lifecycle phase higher than design.

Note that the attachment appears as an item revision attachment in Product Information Management.

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5 Quality Management in Items

Overview of Quality Issues and Actions

The Product Information Management and Product Development work areas integrate with the Quality Management module to help you gain insight to quality issues and actions related to items.

A quality issue is a defect, deficiency, or a significant variation in a product's expected appearance or performance.

Feature for Product Development users.

Feature for Quality Management users.

A quality action is a necessary activity required to mitigate a quality issue and prevent its further occurrences.

> **Note:** On opening an item in the Product Development work area, the Quality tab displays a blue icon, if the item has quality-related data. And on hovering over the Quality tab, the tooltip displays Quality: Has Content.

The Quality tab displays both these tabs:

- Quality Issues and Quality Actions
- Problem Reports and Corrective Actions.

Overview of Problem Reports and Corrective Actions

The Product Information Management and Product Development work areas integrate with the Quality Management module to help you gain insight to problem reports and corrective actions related to items.

- A problem report is a generic quality incident or problem reported from a customer's perspective.
- A corrective action is an action that you take to address or prevent the problem from occurring again.

You can create problem reports and corrective actions for an item from Product Information Management, Product Development and Quality Management work areas, and from Supplier Portal.

- On opening an item in the Product Development work area, the Quality tab displays a blue icon, if the item has quality-related data. And on hovering over the Quality tab, the tool tip displays Quality: Has Content.
- The Quality tab displays both these tabs:
    - Quality Issues and Quality Actions
    - Problem Reports and Corrective Actions

To use advanced workflow capabilities such as additional controls and group approvals, create and manage problem reports and corrective actions just as you would change types in Product Development.

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This is particularly recommended for engineering design use cases where you capture issues related to items. You then collaborate with suppliers through workflow steps for proper resolution.

These types of problem reports and corrective actions are structured more like change requests. They provide tabs for General Information, Affected Objects, Tasks, Attachments, Workflow, Impact Analysis, Relationships, Security, and History.

By configuring the workflow steps, you can:

- Specify automatic status promotion or demotion

- Define entry and exit criteria

- Control who can perform what action

- Perform impact analysis

- Create and assign tasks to track dependencies.

Create Problem Reports and Corrective Actions

You can create problem reports and corrective actions from the:

- **Create** (+) menu on the Overview page in the Quality management work area

- **Actions** menu of an item in the Product Development work area

- **Actions** menu of an item in the Product Information Management work area

You can see that they appear on the Quality tab of items in the Product Development, Product Information Management, and Quality Management work areas. Remember that the **Create Problem Report** and **Create Corrective Action** options appear on the **Actions** menu only after you create and save an item.

For suppliers the page reloads with the newly created object.

> **Note:** The newly created problem reports and corrective actions automatically display organization data from the item.

The workflow of a problem report or corrective action progresses as specified by the statuses defined by the administrator. For more details, see Set Up Problem Reports and Corrective Actions.

Create 8D Corrective Action.

You can choose to create a corrective action from the following two options in the **Type** drop-down list:

- Corrective Action – action to mitigate a quality issue and prevent its further occurrence.

- 8D Corrective Actions – action that uses the 8D methodology. An investigative dive to find the cause of a problem, a solution to fix it and a method to prevent recurrence.

The 8D methodology involves a systematic investigation into the root cause of a problem to prevent recurrence. It uses a structured, preconfigured template based on 8 disciplines to define the problem, identify the root cause, and run the corrective and preventative action (CAPA) to prevent recurrence.

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Here's a brief description of the eight disciplines:

1. Plan and form team: Create a plan to minimize or mitigate the problem and establish a team of skillful and knowledgeable people
2. Define Problem: define and describe the problem
3. Interim Containment: define and implement containment actions
4. Determine Root Cause: identify the root cause
5. Verify Correction: verify and choose the most effective corrective action
6. Implement Corrective Actions: implement the corrective actions
7. Prevent Recurrence: implement actions to prevent a recurrence
8. Recognize Team Effort: acknowledge and congratulate the collective effort of the team.

Note: Although the change type 8D Corrective Actions is predefined, the attribute visibility setting is read-only. The change type inherits the configuration from its parent change type, Corrective Action.

Create a Corrective Action from a Problem Report

You can also create a corrective action from the Actions menu of a problem report. The corrective action opens in a dynamic tab for editing. For suppliers the page reloads with the newly created object.

While creating a corrective action from a problem report, you can select to copy over the descriptive flexfields, attachments, relationships, and tasks for the problem report. You can also copy over the affected objects including descriptive flexfields to the new corrective action. The corrective action is automatically linked to the problem report in the Relationships tab.

Related Topics

- Overview of Change Type Setup
- Configure Change Orders
- Understand Change Types

Access Quality Objects from an Item Structure

This topic describes how you can navigate from an item to related quality objects.

Note that:

- Blue dot icons appear in the Quality column of components on an item's structure table, to indicate the presence of quality-related data. Data includes quality issues, actions, problem reports, and corrective actions.
- You can click the blue dot icon to navigate to the corresponding object in the side tab view without losing context.

You can access and view quality issues and quality actions for all revisions of an item from the Quality tab. You can access the quality objects from:

- Quality tab in Product Development and Product Information Management work areas.

  Navigate to Item > Quality tab.

- Item structure component's side panel in Product Development work area.

  Navigate to Item > Structure. Select a component and click the Quality tab in the side panel.

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Quality Management in Items

- Redline item structure component's side panel in Product Development and Product Information Management work areas.

  Navigate to a Change Order > Affected Object tab. Click the affected object that you want to view. Click the Structure tab and select a component. Click the Quality tab in the side panel.

You can also perform the following actions from the Quality tab:

- Query by Example
- Export to Excel
- Detach the Table

Note: When doing QBE on Severity, enter only the text value, and not the numeric prefix. For example, if severity is '1 High', enter only 'High' in the QBE field.

Attributes that appear on the quality issues and quality actions table are similar to the ones that appear on the **Manage Quality** page.

Note: Users with the item privilege EGP_VIEW_ITEM_PRIV can view the Quality tab on the Item Details page.

Secure Access to Quality Issues and Actions

This topic describes how security is supported in Oracle Quality Management. Use the Security side tab on issues and actions to add users and roles who can view and search for issues or actions.

Security is applied at two levels:

- Functional Security
- Data Security

Functional Security

Functional security defines the functions you can perform and the pages and objects you can access. For example, it defines who can

- enter the quality management work area
- create a quality action
- create a quality issue

The two types of privileges in Oracle Quality Management are:

- Manage - lets you create and edit issues and actions
- Review - provides a read-only view of the issues and actions.

Functional security in Oracle Quality Management is based on the following privileges:

- Manage Quality Action
- Review Quality Action
- Manage Quality Issue

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- Review Quality Issue

You can assign these privileges only to the user roles, and not directly to the user.

For example, assign John Smith the Quality Analyst user role (which contains the Manage Quality Action, Review Quality Action, Manage Quality Issue, Review Quality Issue privileges) to create and edit quality issues and actions. The two privileges are assigned to specific task flows and menu actions.

While setting up functional security, consider:

- the privileges assigned and the user roles to which they're assigned
- the users, the functions they can perform, and the functionality and work areas they can access

Oracle delivers some users, user roles, and privileges out of the box. The users and user roles can be adapted and assigned respective privileges.

Data Security

Data security defines access to specific data (records) and is applied in addition to functional security. For example, even though you can create and manage quality issues (functional security) as a user you may not see the quality issue "ISSUE46", because the data record isn't visible for your user role (data security).

To enable Data security, you can:

- define data security grants for accessing the issue and action tables for specific user actions
- define data security grants for editing in the issue and action Security tab
- define which users and roles can access a specific issue or action by adding them to the Security tab of the issue or action
- define which user can see which quality issues based on inventory organization assignment
- grant permissions to perform changes depending on the status of the object.

Data Security Grants on Tables

Data Security grants on the issue and action tables define each user role. All the users who need to see, update or delete issues and actions, need to be assigned to a user role that grants them access to these data tables with the corresponding user action.

You can grant overall access to the issue and action table, or access to specific user actions like Read or Update.

> **Note:** Data security grants can't be defined for the creation of issues and actions, as the data doesn't yet exist. Hence, creation can only be allowed or prevented through functional security.

Data Security Grants on Application Objects

Data security grants are essential to add and remove users and roles on the Security tab of issues and actions. Hence, you require an additional data grant for application objects on the table FND_OBJECTS for issues and actions.

Data Security Grants Based on Users and Roles on Security Side Tab

The Security side tab for issues and actions makes previously public issues and actions private by assigning them to specific users and roles.

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After you add the first user and user role to the Security tab, only respective users and user roles (user assigned to these user roles) have access to these issues and actions. In addition, the Creator and Assignee are automatically granted the privilege to see the issues and actions.

Permissions to Perform Changes Based on the Object Status

Depending on the type of data, you can restrict the user from editing the issue or action even if the appropriate privileges and grants are available. For example, if the quality issue or action is:

- logged as Production Exception
- logged as Inspection Non-Conformance
- in a state which prevents editing

You can't edit a record or its relationships; this is to prevent any inconsistencies between production exceptions that you log in manufacturing and the respective quality issues.

You can't delete inspection non-conformances, but you can perform most editing operations.

You can't edit quality issues and actions if they're in certain states, such as waiting for approval, or after approval and closure. This ensures that other quality users can rely on the fact that's issues and actions that they approve or have approved, won't change.

Visibility of Quality Actions and Issues Based on Inventory Organization Assignment

You can assign a specific organization to a quality action or issue to identify where the issue or action has occurred. Note that users who need to create or access quality issues or actions for an inventory organization must also be assigned to that organization. You can do this using the **Manage Data Access for Users** task in the **Setup and Maintenance** work area.

If you're using configured job roles to access quality objects, ensure that these job roles are assigned to the right data security policies in the **Security Console**, specifically **Grant on Inventory Organization**.

The following data security function must be entered for user-defined roles in the **Security Console** for the **Quality Actions Data** privileges:

- **Policy Name**: Grant on Inventory Organization
- **Database Resource**: Inventory Organization
- **Dataset**: Select by Instance Set
- **Condition Name**: Access the inventory organization parameter for table INV_ORG_PARAMETERS for the inventory organizations in which they can operate.
- **Actions**: Manage Quality Organization

Access to Affected and Related Objects

You can add items, manufacturing work order operations, manufacturing resources as affected objects to quality issues and actions. Relate Oracle Innovation Management and Product Development objects like ideas, requirements and change orders to the quality issue and action.

Functional and data securities govern quality issues and actions. So, even though you can view a related idea or an affected item, you can't open it unless you have the appropriate privileges.

For example, to open and see the details of an affected item, you not only are required to have functional privileges to view and manage the item but also have data security grants to the inventory organization.

User and Role Data Security

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The security side tab on issues and actions enables you to add users and roles who can view and find this issue or action.

The creator and assignees can automatically access the issue or action. Users not listed on the security tab can't find or view the issue or action.

Related Topics
- Restrict Available Objects Through Configured Roles

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6 Manufacturers and Manufacturer Parts

Overview of Manufacturers

An Approved Manufacturers List (AML) represents a list of manufacturers, suppliers, or vendors approved by a company for the purpose of procuring manufactured items. You can add manufacturers to the AML tab on an item.

The AML tab on an item captures information about the manufacturers and manufacturer parts associated with the item.

In the Product Development work area, you can do the following:

- Create manufacturer parts.
- Create the manufacturers and associate them with manufacturer parts.
- Secure access to manufacturer parts.
- Assign the manufacturer parts to the items.

For more information on creating a manufacturer and manufacturer part, see the related topics.

Related Topics
- Create a Manufacturer and Manufacturer Part
- Types of Item Relationship
- Watch Video: Create a Manufacturer and Manufacturer Part

Create a Manufacturer and Manufacturer Part

In the Product Development work area, you can create a manufacturer and a manufacturer part, and then assign the part to an item.

1. Create a manufacturer using the following steps:

   o From the **Tasks** panel drawer, click **Create Manufacturer**.
   o In the **Create Manufacturer** dialog box, enter the manufacturer name and provide a brief description. Click **Save and Close**.
   o Enter any additional information, if required. Click **Save and Close**.

2. Create a manufacturer part using the following steps:

   o From the **Tasks** panel drawer, click **Create Manufacturer Part**.
   o In the **Create Manufacturer Part** dialog box, select the corresponding manufacturer or search for it.
   o Enter a manufacturer part number and provide a brief description.
   o Select whether you want to activate the manufacturer part, retain it as inactive, or pending. Click **Save and Close**.

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- Enter any additional information. Click **Save and Close**.

3. Assign the manufacturer part to an item, using the following steps:

- Open the item in which you want to assign the manufacturer part. Click the **Structure AML** tab.
- Select the row of the item to which you want to assign the manufacturer part.
- In the side tab, click **AML**, and click **Actions** > **Select and Add**.
- In the Add AML dialog box, select the manufacturer and the part number.
- Select whether the part is preferred or alternate. You can assign multiple manufacturer parts to an item.
- Click **OK** and click **Save**.

The new manufacturer part is assigned to the selected item.

You can also create manufacturers and manufacturer parts from:

- The AML tab of the item
- The AML tab in the change order

Manufacturer parts can be associated with an item in a structure. The same manufacturer part can be added to multiple items in a structure. To locate where it's assigned across all items and structures, use the **Where Used** side tab on the manufacturer part.

Related Topics
- Watch Video: Create a Manufacturer and Manufacturer Part

Search for Manufacturers

Find manufacturers and manufacturer parts with simple or advanced searches.

Use the **Add Fields** button on the Manage Manufacturers page to include attributes such as D-U-N-S number, Country, State, City, and so on, in the search criteria. These attributes appear as columns in the search results table.

Use the **Create Saved Search** dialog box to include the attributes such as D-U-N-S number of the manufacturers in the **Saved Searches** list of the Manage Manufacturers page. Save the search with this additional criteria so that it's available in the **Saved Searches** list for reuse.

> **Note:**
> - This feature is available only if you've opted in for the feature Upgrade Manufacturer Management.
> - If you opt in to this feature, you've to recreate your saved searches in the Manage Manufacturers page.
>
> This feature is available only if you've opted in for the feature Upgrade Manufacturer Management.

Where Used

Use the **Where Used** side tab on the Manufacturer page to locate where the manufacturer part is used across all items and structures. Additionally, use the **Export to Excel** option in the **Where Used** side tab to share and analyze

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manufacturer data such as manufacturer part number, description, status, created by, creation date, last updated by, and updated date.

Considerations for Managing AML

If you're using both Product Development and Product Information Management, here are some considerations for managing AML:

- After you create an item and define its AML in Product Development, it will be visible on the item in Product Information Management only when the item is in a higher lifecycle status than Design, such as Prototype or Production. To make changes to the item AML after the item is in production, you must create a change order.

- For commercialization or item master use cases, always use the Trading Partner Item Relationships feature directly in Product Information Management. This relationship enables you to track the manufacturer part number for an internal item in the same way as the AML.

- You can't control Trading Partner Item Relationships using change orders, or use predefined fields to track preference and approval status of manufacturer parts.

Related Topics
- What's the difference between manufacturers and trading partner items?

Secure Access to Manufacturers

Use the manufacturer-specific privileges to securely access the manufacturer data. These privileges provide granular access control to manage manufacturer data.

Here are the privileges required to secure access to manufacturers:

- Create Manufacturer: You can only create manufacturers with this privilege.
  - Privilege: Create Manufacturer (EGP_CREATE_MANUFACTURER_PRIV)

    Users who are assigned the Create Manufacturer privilege should also be given the Manage Manufacturer privilege (EGP_MANAGE_MANUFACTURER_PRIV)

- View Manufacturers: You can view all the manufacturers with this privilege.
  - Privilege: View Manufacturer (EGP_VIEW_MANUFACTURER_PRIV)

- Manage Manufacturers: You can view and edit the manufacturers.
  - Privilege: Manage Manufacturer (EGP_MANAGE_MANUFACTURER_PRIV)

Note: This is available only if you opt in to the feature: Upgrade Manufacturer Management.

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Secure Access to Manufacturer Parts

Use the **Security** tab on the manufacturers and the manufacturer parts to secure access to manufacturer parts. You can add the users and roles (groups) who should have access to manufacturer parts.

> **Note:**
> - This is available only if you've opted in for the feature: Upgrade Manufacturer Management.
> - If you opt in to Upgrade Manufacturer Management and use granular privileges, you can access the Security tab only if your role has these policies assigned to it:
>   - EGP_TRADING_PARTNER_ITEMS
>   - EGP_PRIVATE_TRADING_PARTNERS

Secure Access to All Manufacturer Parts Created for a Manufacturer

Here's how you secure access to all the manufacturer parts created for the manufacturer.

1. Click the **Security** tab on the manufacturer.
2. Deselect the **Public** check box.
3. Click **Create** to configure a person or a group to access manufacturer parts.
4. Select whether you want to grant access to a person or a group, and select the name of the person or the group.
5. Select the privileges you want to provide:
    - **View**: allow users to view the manufacturer part.
    - **Maintain**: allow users to edit the manufacturer part.
    - **Administer**: allow creating new manufacturer parts for the manufacturer.

    To allow more persons or groups to access manufacturer parts, repeat the previous steps.
6. Save your changes.

    The security is inherited by all manufacturer parts created from the manufacturer.

> **Note:** To revoke access to a person or group, select the person or group and click the **Delete** button.

Secure Access to Individual Manufacturer Parts

Prerequisite: You must enable security on the trading partner item using **Manage Trading Partner Items** > **Edit Trading Partner**, in the Product Information Management work area. This will allow you to view the Security tab on the manufacturer part (in the Product Development work area).

Here's how you secure access to an individual manufacturer part.

1. Click the **Security** tab on the manufacturer part.

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2. Click **Create**.
3. Select whether you want to grant access to a person or a group, and select the name of the person or the group.
4. Select the privilege you want to provide:
   - **View**: allow users to view the manufacturer part.

   - **Maintain**: allow users to edit the manufacturer part.

   Note:
   - A check box appears in the **Inherited** column if the grant is inherited from the manufacturer.

   - The Security tab isn't displayed on the supplier portal.

Additional Considerations

- The Security tab on the manufacturer page shows updates made to the Public setting and data grants on the trading partner in the Product Information Management work area. Likewise, such updates to the manufacturer made in Product Development are replicated on the trading partner page in the Product Information Management work area.

- Manufacturer parts inherit the grants added to the parent manufacturer, but the security tab isn't displayed on the manufacturer part. Edit the trading partner item to see these inherited grants and add additional singular grants in the Product Information Management work area. These individual grants apply to the manufacturer part and item AML.

Related Topics
- Data Security for Manufacturers and Manufacturer Parts
- Create and Edit Trading Partner Items

Create Manufacturer Part Using Save As

You can use the Save As feature to create a new manufacturer part from the Actions menu on the Manufacturer Part page.

Here's what you can copy over from an existing manufacturer part:

- Attachments

- Additional Information such as descriptive flexfields

- Security Settings

Note:
- You must have the Manage Manufacturer Part privilege to use the Save As feature; if you don't, the Save As option is grayed out.

- If the source manufacturer part is private, then you must have a Maintain grant privilege to use the Save As feature.

Created From

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You can track which manufacturer part was used to create a new part using the **Created From** field on the General Information page. This field displays a link to the source manufacturer part from which the current manufacturer part was created. You can click this link to navigate to the original part and view the details.

- The Created From field displays the source manufacturer part name.

- In the Save As dialog box, if you change the manufacturer from the source manufacturer, the Save As dialog box displays the grayed out Security check box. The manufacturer part instance grants aren't copied to the new manufacturer part.

Note: The Supplier Portal doesn't provide the Save As option or display the Created From field on manufacturer parts.

Create OTBI Reports for Manufacturers and Items

You can create reports in Oracle Transactional Business Intelligence (OTBI) for manufacturers, and manufacturer parts along with items.

You can also analyze manufacturers by various criteria such as:

- configured attributes

- location attributes such as Country, State, and City and

- manufacturers without associated manufacturer part numbers.

Related Topics
- Use Reports and Analytics

FAQs About Approved Manufacturers List

How can I search for manufacturer parts based on specific attributes?

From the Tasks side tab, select Manage Manufacturer Parts.

On the Manage Manufacturer Parts page, you configure the criteria to search for manufacturer parts.

Click **Add Fields** to add more attributes to the search criteria. The attributes appear depending on the descriptive flexfields configured by the administrator.

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Why can't I add a manufacturer part to an item?

The item might be assigned to a change order with a pending revision.

Will the approved manufacturers list (AML) I add in Product Development show up in Product Information Management?

The AML you add for an item in Product Development is visible in Product Information Management only if the Product Development item is in a lifecycle phase higher than design.

Related Topics
- Overview of Manufacturers

What's the difference between manufacturers and trading partners?

Manufacturers and trading partners mean the same, but the terminology differs based on the work area.

The Product Development work area uses manufacturers and manufacturer parts.

The Product Information Management work area uses trading partners and trading partner items.

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7 Structures

Overview of Structures

In Product Development, a Bill of Materials is called a structure.

When you add an item to a parent item, you create a simple structure. As items are added, the structure is always named and referred to by its top-level item.

A structure holds all the items and documents that make up an assembly or subassembly. Items and documents may be in the same structure; there's no restriction on the maximum or minimum number of either type of business object.

Any item on a structure may be associated with one or more manufacturer parts. On the Structure table, an icon next to an item indicates the presence of manufacturer parts. So, a structure populated with items will likely comprise associated manufacturer parts.

A document structure holds all the documents that make up a meaningful document, such as a specification for a product. When you add a document to a parent document, a simple structure is created. A structure of documents will be named and referred to by its top-level document. A document structure may be only one document.

Create Structures

You can create a structure by either selecting and adding existing items, or creating new items. Use the **Actions** and **View** menu on an item to create and modify the structure.

Here's how you create a structure:

1. Open the item and navigate to the Structure tab.
2. To add a new item in the structure, click **Actions** > **Create**.
3. To add existing items to the structure, click **Actions** > **Select and Add**.

> **Note:** You can't add duplicate components to a structure or a parent component to a child component. This applies to both preliminary structures and affected item structures on engineering and commercialization change orders.

Create an Item and Build an Item Structure

This topic covers how to create an item and build an item structure. A structure contains information on the parent item, components, and descriptive elements.

1. In the Product Development work area, create an item using the following steps:
   o From the **Tasks** panel tab, click **Create Item**.
   o In the **Create Item** dialog, select the class in which you want to create items.

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> **Note:**
> - You can only select an item class for which you have been assigned privileges.
> - When you create an item in a child item class, the attribute values are applied only from the default template for the child class and not from the item class hierarchy.

- Enter a name for the item and provide a brief description.

  The name and description can be generated automatically by configuring the item class.
- Select the primary unit of measure for the item.
- Enter the value for item attributes.

  Attributes and their values appear only if they're configured for the item class. You can use the predefined values or modify them.
- Click **Save and Close.**

2. To copy existing items that you want to use for building the item structure, do the following:

   - From the **Tasks** panel tab, click **Manage Items**.
   - Enter a criteria to search for existing items and click **Search**.
   - In the search results page, select the items you want to add to the item you created. Note that you can use the control key to select multiple items.
   - Click **Copy** and click **Done**.

     The items are copied to the clipboard.

3. To build the item structure using the items you copied, do the following:

   - In the item that you created, click the **Structure** tab.
   - Click the **Paste** icon. The items are pasted to the structure.
   - Click **Save**.

4. To create a new item and add it to the structure, do the following:

   - In the item that you created, click the **Structure** tab.
   - Click the **Create** icon.
   - In the **Item Create** dialog box, enter the details of the new item.
   - Click **Save and Close**.

5. To add an existing item to the structure, do the following:

   - In the item that you created, click the **Structure** tab.
   - From the Actions menu, click **Select and Add**.
   - Enter the criteria to search for the existing item and click **Add**.
   - In the **Select and Add** dialog box, select the item.
   - Click **Apply and Close**.

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Related Topics
- Watch Video: Create an Item and Build an Item Structure.

View and Edit Structure Details

To view the structure component details in a side panel, select a component row on the structure tab of the item.

The header of the side panel shows the name of the selected component. You can move from one component row to another, and use the side panel to navigate easily between the component details.

You can enter the following component details from the side panel: reference designator, additional information, attachments, AML, additional attributes, and substitute components.

> **Note:**
> - You can edit a component from the item structure page, if it's not assigned to any change order.
> - You can edit reference designators using the side panel, if your administrator has set the **Reference Designator Range Indicator** to **None**. Otherwise you can edit them directly in the structure table.
> - If you have added a component to a common structure associated with one or more organizations, and one of those organizations became inactive, the assignment to the inactive organization is skipped, and this information is recorded in the log file.

Icons on Component Rows

The pencil icon in a column indicates that there's additional information that you can view. You can click the icon to navigate to the corresponding tab in the side panel view.

The following icons appear only if you've opted in for the feature User Interface Improvements for Items and Changes.

- A blue dot icon in any of the following columns of a component row - attachments, AML, substitute components, pending changes, and quality - indicates the presence of content. Click the dot icon to navigate to the corresponding tab in the side panel view.
- For quality-related data, the blue dot appears if there's at least one quality issue, quality action, problem report, or corrective action in any workflow status against any item revision. If no issues or actions appear against the item you've chosen, select other revisions and see which ones have issues or actions logged against them. With problem reports and actions, you can see them across all revisions of the item.
- In the redline view of the affected item's structure, the reference designator, and substitute component icons appear in blue when there are redlines.

> **Note:** The structure component attachments, AML, additional attributes, pending changes, and quality tabs on the side panel appear in the read-only mode on engineering change orders.

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Points to Consider

- The affected item's structure tab on commercialization change order doesn't include side panel tabs for attachments, or AML. It also doesn't have the blue dot icons for Pending Changes or Quality related data.

- Pending Changes and Quality side panel tabs aren't displayed in the Supplier Portal.

In the following image, you can see the blue dot icon in the Changes column indicating the presence of content in it. You can click the blue dot to open the Changes side tab for the selected component.
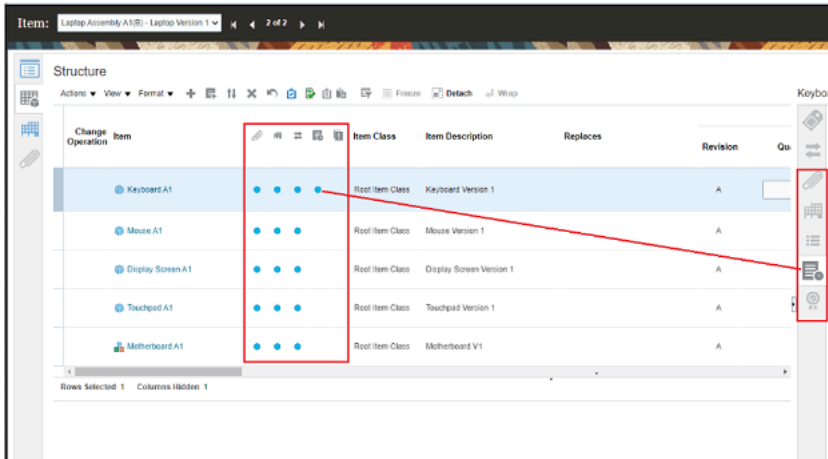
Key Actions and Features on a Structure Page

Here are some of the key actions and features available on the toolbar or the **Actions** menu on a structure.

- **Fill Up** (Ctrl+U), or **Fill Down** (Ctrl+D), and **Fill Selected** (Ctrl+S): you can quickly fill in attributes when you've added new items (this is also available when modifying a change order).
    - **Fill Up** (Ctrl+U) and
    - **Fill Down** (Ctrl+D) are available when you've selected a consecutive range of rows. Remember that you've to select the table cell and modify the value in the cell for Fill Down and Fill Up to work.
    - **Fill Selected** (Ctrl+S) is available when you have used **Control-click** to select nonconsecutive rows.

      Note that the Effectivity Date attribute isn't automatically populated.

- **Search**: Enter the criteria to search for components within the structure. The application performs a search based on the component name and description.

- **Quantity Related**: Select this to validate whether the item structure quantity matches the reference designator count. A message appears in case of quantity mismatch. This is enabled by default in Product Development structures. This action is also available on the reference designator dialog box.

- **Align Quantity**: Select this to automatically update item quantity to match the reference designators count. This action is also available on the reference designator dialog box.

- **Set Quantity Related to No**: Select this to disable the Quantity Related setting that creates a dependency between component quantity and the number of reference designators. If the Quantity Related field is set to No, the application allows a mismatch between the component quantity and the number of reference designators entered for the selected component.

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- **Set Quantity Related Field to Yes**: Select this to enable the Quantity Related setting that creates a dependency between component quantity and the number of reference designators. If the Quantity Related field is set to Yes, the application checks whether the specified component quantity matches the number of reference designators entered for the selected component and displays a warning if there's a mismatch.

- **Freeze:** This is useful when you want to work with a large amount of component data spread across multiple columns in the item structure. To freeze a column, select the column and click **Freeze**. Scroll through the columns keeping the frozen column in context. For example, you can keep the item name column frozen and scroll to view all its additional attributes.

For more details, see Freeze Structure Columns on Change Orders.

Replace a Component

You can replace a component in your item structure, copying over key data from the original component to the replacement component.

You can replace a component from:

- an item structure page in the Product Information Management work area
- a change order's Affected Objects Structure tab in the Product Development work area

How You Replace a Component

1. Depending on your work area, here's how you select the component you want to replace.

   In Product Development,
   - Open the change order that contains the component you want to replace.
   - Click the Affected Objects tab and select the component you want to replace.

   In Product Information Management,

   - Open the item that contains the component you want to replace.
   - Click the Structures tab and select the component you want to replace.
2. Click **Actions** > **Replace**. You can also use the **Replace** icon on the toolbar.
3. Search for and select the replacement component.

   The original component is redlined and the replacement component appears in green (which is different from the initial color). The original component also appears in the **Replaces** column for your reference.

   End date of the original component becomes the start date of the replacement component.
4. Save your changes.

   In the Product Information Management work area, you can save your changes to the item or save the changes to a change order and route it for approval.

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How Start and End Dates are Derived

The table lists how the start and end dates are derived upon replacement.

In Product Development	In Product Information Management
Upon replacement, the end date of the original component and the start date of the replacement component will be the same as the effective date of the affected object. If the affected object is effective on approval, this will be the date when the change order is moved to Scheduled status. If the affected object has a future effective date, this will be the same as the effective date.	Upon replacement, the end date of the original component and the start date of the replacement component will match the date in the **Date** field on the toolbar of the item structure page. If a replacement is to be effective only in the future, select a future date in the toolbar and then perform the **Replace** action. The replacement is visible in the structure when the date selected is after the start date of the replacement component.

What's Copied Over to the Replacement Component

When you replace a component, item sequence, structure component attributes, substitutes, and reference designators are copied over from the original component to the replacement component.

Here are the attributes that are copied over:

Component Attributes

- Item Sequence - Read-only
- Quantity
- Yield
- Comments
- Start Date
- End Date
- Planning Percent
- Check ATP
- Required to Ship
- Required for Revenue
- Include on Shipping Documents
- Automatically Request Material
- Basis
- Enforce Integer Requirement
- Supply Type
- Component UOM

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Substitute Components

- Item

- Description

- Primary UOM

- Quantity

- Inverse Quantity

- Priority

- Enforce Integer Requirement

- Descriptive flexfields

Reference Designator

- Reference Designator

- Description

- Descriptive flexfields

Considerations for Replacing Components

The table shows considerations for replacing components based on the work area.

In Product Development	In Product Information Management	Across Product Development and Product Information Management
• You can't replace a component that is already a replacement for another component in the same change order. • You can use the **Undo Redlines** action to revert the replacement action when the change order is in Open or Interim Approval status, provided you have the permission to perform the action. This permission is defined in the Additional Workflow Controls table in the change type setup. • If you're replacing an item with a document, then the reference designators aren't copied to the replacement. • In the Change Order Details report, replacement attributes are displayed regardless of whether you opt in for this feature or not. These attributes can't be hidden.	• Once a replacement is selected, neither the original nor the replacement component can be edited. • The **Replaces** column is visible by default and retains the record of replaced components even when you enter future dates in the **Date** field. The original component is shown in the **Replaces** column until it's replaced with another component.	• If a component has redlines, for example, the quantity is updated, the component can't be replaced. • If the replacement component selected has a different UOM from the original component, a warning message appears and the quantity is reset to 1. Reference designators and substitute components aren't copied over. The replacement component's UOM will show the item's primary UOM. • If the replacement component was defined as a substitute component of the original component, then it isn't copied to the substitute component table of the replacement component.

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Track Replacements

You can generate the Change Order Details report to track replacements made to structure components using the change order. Here are some points on the report:

- Replacement attributes can't be hidden.

- The **Replaces** column appears in the Structure Changes table showing the original component that was replaced.

- The **Change Action** column shows the replacement component as **Added** and original component as **Disabled**.

- Copied reference designators and substitute components are shown against the row marked **Added**.

- **Change Action** and **Replaces** attributes are shown in the **Pending Component** section.

Add Reference Designators on Items

Reference designators commonly serve as a labeling system to refer to components.

If your administrator has configured reference designators for adding them inline with item components, here's how you add them:

1. Navigate to the Structure tab on the item and select a component in which you want to add reference designators.
2. In the Reference Designator column, click the expansion button '...'
3. In the Reference Designator dialog box, enter the range for designator values.

   For example, if your administrator has selected '+' as a range indicator, you can enter 'A1+ A5' and the application will expand the range to create five reference designators: A1, A2, A3, A4, and A5. The expanded range appears in the side panel once you save your changes.

   Additional options in the Reference Designator dialog box:
   - **Quantity Related**: To validate whether the item structure quantity matches the reference designator count, select this option. A message appears in case of quantity mismatch. This is enabled by default in Product Development structures.
   - **Align Quantity**: If the structure item quantity doesn't match the count of reference designators, select this option and click OK. This would allow automatic update of item quantity, to match the reference designators count.

   Note: You can also access Quantity Related and Align Quantity functions from the toolbar of the Structure tab, and the Actions menu. To modify the details of reference designator, you can use the Reference Designator dialog box or the Reference Designator column.

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4. Click **Save**.
   To view and modify descriptive flexfields, you can use the side panel.

   > **Note:** Modified reference designators appear in italicized red colour after you save your changes.

Related Topics

- Items and Documents in Product Development
- View and Edit Change Details
- Define a Change Order

Delete a Component

When you delete a component, here's how the side panel displays details:

- If you delete a component row, the side panel automatically displays details about the next component.
- If all components are deleted, the parent component detail is displayed.
- When you select multiple components and delete them, the side panel displays details based on the component you select first. For example, if you first select the component named Component_2, then the side panel displays information about the next component named Component_3.

Rules About Item Structures

Here are some rules about item structures.

During the Item Lifecycle Phase

- You can't reinstate the parent item in a structure if the child component is marked obsolete.
- You can assign an item in Draft approval status to an item structure.
- A component's lifecycle phase should be the same or higher than the parent assembly's lifecycle phase; this applies to items of lifecycle phase Preproduction or Production only.
- If an assembly is approved, components in the draft status can't be added. This applies to items of lifecycle phase Preproduction or Production only.
- A hand-over of a structure to the downstream processes is triggered by changing the lifecycle phase of the parent item to Preproduction or Production.

When You Create Change Orders

- You can edit an item without going through change management control, only if the item isn't assigned as an affected object to a change order.
- If you're unable to add an item to a structure, here are some of the possible reasons:
    - There's another, later revision of the parent item.

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- The parent item is on a change order with a pending revision.

- The item was earlier assigned to a change order and the change order is complete. So you're not allowed to modify the item's attributes, structure, AML, or attachments. To modify the item, assign it to a new change order.

- The item is a duplicate component, or you're adding a parent component to a child component.

- If the item is a commercial item, you can't add it to an engineering change order.

When You Deprecate Items

- You can deprecate an item if it isn't used in another structure.

- A child item can still be active if its parent is obsoleted.

- A child item can't be obsoleted if the parent item is active.

To Calculate Item Grade

- You can add items or other subassemblies to the top-level item. After you add the items, the grade of the top-level item must be refreshed. This results in a display of a newly calculated value of the grade.

- The grade of the entire top-level assembly or item takes into account various statuses of the child items within the structure.

- You must examine a structure to see which items don't have an AML or which ones have pending changes. Based on these conditions, you can decide to improve the grade, and then publish the item for manufacturing readiness.

Manage Substitute Components

You can add and update substitute components for items, from the contextual side panel on the item structure tab.

Here's how:

1. Launch the item from the Affected Objects tab on a change order.
2. Click the Structure tab on the item.
3. Select the component for which you want to add the substitute.
4. In the side panel, select the Substitute Components tab to add the substitute.

Here are some details on managing substitutes:

- Only the structures of preliminary items (items that have never been released before) can be updated. Similarly, only substitute components in preliminary stage can be updated. Once released, components and substitutes can be updated only through an engineering change order.

- The lifecycle phase of the substitute should be the same or higher than the component. You can add a substitute component belonging to a lower lifecycle to an item, only when a released item with a higher lifecycle phase than design is allowed to be added to a preliminary item by disabling lifecycle validation.

  > **Note:** To disable lifecycle validation deselect the **Enable Lifecycle Validation** check box in the Item Structure Type Details task. To access the task, in the Setup and Maintenance work area select Product Management offering > Functional Area: Structures > Item Structure Type Details.

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- If you have a parent item which is preliminary, you can add components that are released or preliminary. In both these cases, you can add substitutes. You can also add substitutes to a sub-assembly.

- You can't add a parent item as a substitute.

- When you add a substitute in the side panel, the quantity is defaulted to the original component value and can be edited.

- Once released to a pre-production lifecycle, only the additional attributes (descriptive flexfields) can be updated in the Product Information Management work area.

- You can identify where an item is used as a substitute by using the where used query on the item structure page.

Related Topics
- View Item and Document Details

Import an Item Structure

Importing structures of items is similar to importing regular items. When you intend to collect items in a structure and then import that structure, the regular items must first exist in the application.

If some or all items going into the structure don't exist already in the application, these items must be created or imported before you design and import the structure.

1. Download the Item Structure Import template file from the following guide: Oracle Fusion Cloud SCM File-Based Data Import (FBDI) for SCM.

   This guide contains information about the template.
2. Enter the item information on the EGP_STRUCTURES_INTERFACE tab:

   - Set the Transaction Type to SYNC.
   - Enter a Batch ID such as 200.
   - Enter the Structure Name such as Primary.
   - Enter an Organization Code such as 000.
   - Enter the Item Name.

   In the EGP_SYSTEM_ITEMS_INTERFACE tab, you need not enter the item version start date. The application calculates this value based on item effectivity date in the EGP_ITEM_REVISIONS_INTERFACE tab. In case of multiple item revisions (or effectivity dates), the earliest date is considered.
3. Enter the structure information on the EGP_COMPONENTS_INTERFACE tab:

   - Set the Transaction Type to SYNC.
   - Enter the same Batch ID as on the EGP_STRUCTURES_INTERFACE tab.
   - Enter the Structure Name as Primary.
   - Enter the same Organization Code as on the EGP_STRUCTURES_INTERFACE tab.
   - Enter a child item in Component Item Name.
   - Enter the parent item in the Structure Item Name.

- ○ Enter a number for the component item sequence which determines the order in which child items are listed. In the absence of a sequence number or in case of a duplicate sequence number, the application automatically generates the sequence number.
- ○ Enter a number for the quantity of each item.

4. Generate CSV files:

- ○ Select the **Instructions and CSV Generation** tab and click the **Generate CSV File** button.
- ○ Click **Save** each time the macro prompts to do so.
- ○ Locate the zip file that was generated by the macro.

5. Import the zip file:

- ○ From Navigator, open **File Import and Export**.
- ○ Click the Create New **+** icon.
- ○ Click the **Browse** button and locate the zip file that was generated by the macro.
- ○ In the Account field, select **SCM / item / import**.
- ○ Click **Save and Close**.

6. Load data to interface tables:

- ○ From Navigator, open **Scheduled Processes**.
- ○ Click the **Schedule New Process** button.
- ○ Search for and select **Load Interface File for Import** as the process name.
- ○ Click **OK**.
- ○ Select **Item Import** as the Import Process.
- ○ Select your zip file as the Data File.
- ○ Click **Submit**.
- ○ Note the process number.
- ○ Click the **Refresh** icon on the Scheduled Processes Overview page to watch for the process to complete.

7. While still in Scheduled Processes, click the **Schedule New Process** button.

- ○ Search for and select **Item Import** and click **OK**.
- ○ Enter the same Batch ID that you put in the spreadsheet.
- ○ Select the same organization that you put in the spreadsheet.
- ○ Set the other fields as required.
- ○ Click **Submit**.
- ○ Note the process number.
- ○ Click the **Refresh** icon on the Scheduled Processes Overview page to watch for the process to complete.

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FAQs About Structures

How can I view the manufacturer parts used in an item structure?

On the Edit Item page, click the AML tab.

The following subtabs appear:

- Item AML subtab - lists the approved manufacturers for the item.
- Structure AML subtab - lists the manufacturer part numbers used in the structure of the item.

How can I view attachments for all the components of an item structure?

On the Edit Item page, use the Actions menu to download the report containing attachments for all the components of an item structure.

How can I find out when the component is added and removed from the structure?

The start date and end date fields on the item structure page indicate the date when the component was added and removed from the structure.

Why can't I modify the structure?

Because the item structure either has another revision or is on a change order with a pending revision.

How can I reinstate a parent item in a structure that contains obsolete components?

You must first reinstate the obsolete components and then reinstate the parent item.

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Can I use a replaced component in another item?

Yes. For instance, you replaced a component because a buyer rejected it based on company regulations. But you can still use the component in another item where the regulations don't apply.

Related Topics
- Replace a Component

How can I remove an obsoleted component from an item structure?

Change the lifecycle phase to Production and remove the component from the item structure. Then change the lifecycle phase to Obsolete.

To change the lifecycle in the Product Development work area you must create a change order and release it. But in the Product Information Management work area you don't have to create the change order.

How can I compare different revisions of the same item?

On the Structure tab of the item, use the Actions menu and select Compare Structure. In the Compare By list, select Revision. You can compare different revisions of the same item or different items.

How can I inform other users about my new item structure?

Select **Send Object** in the **Actions** menu and add the users you want to inform.

In a structure, how can I view the items available in an item class?

Export the item structure using the Export to Excel icon and filter the spreadsheet to view items by the item class.

You can also view the item class on the Structure and Where Used tabs of the item.

In a structure, how can I manage mismatches in lifecycle phase?

To manage the lifecycle phase for a structure type, use the Enable Lifecycle Phase option available in the Manage Item Structure Type task.

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To access the Manage Item Structure Type task, navigate to the Setup and Maintenance work area. Select the Product Management Offering, and Structures functional area.

Select the **Enable Lifecycle Phase** option to manually correct any mismatches in lifecycle phase. Deselect the option to allow creation of item structures with components at a lower lifecycle phase than the parent item.

The changes you make to the **Enable Lifecycle Phase** option don't impact existing structures. For such structures you must manually correct the mismatches in lifecycle phase.

Why can't I access the item structure and edit its AML and attachments?

To view and update the item structure, you must have the Maintain Item Structure security grant assigned to your role.

To edit AML and attachments, you must have the Maintain Item Basic security grant.

Related Topics
- Set Up Data Security for Item Classes

Can I modify substitute components?

Yes. You can modify substitute components using an engineering change order.

Related Topics
- Manage Substitute Components

Why am I unable to view the Substitute For column in the structure details?

Ensure that you've selected **Include Substitute Components** in the search filter and the **Substitute For** column in **View > Columns**.

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8 Change Management

Overview of Change Orders and Change Requests

Change orders and change requests let you process changes to items, and documents. Change orders allow you to markup the required changes, and the changes become effective on approval. But change requests don't provide any markup.

> **Note:** Change objects may be referred to generally as change orders, change requests, or changes. However, when being specific about change types that your company may use to create individual change objects, you must differentiate between change order and change request types.

As a product manager you can manage change orders. Your users can:

- Create change orders within predefined change types.
- Author and view product changes.
- Submit changes for review and approval.
- Track change statuses.
- Implement changes on a scheduled date.

To ensure successful and validated completion of change orders, changes are submitted through a formal review and approval workflow.

Change Types

You can create change orders based on the predefined change types setup by your administrator. To create a change type:

In the Setup and Maintenance work area, go to the following:

- Offering: Product Management
- Functional Area: Change Orders
- Task: Manage Change Order Types

> **Note:** For details of all notifications in Product Management, see View Product Management Notifications on the Oracle Help Center.

To use change orders, you must create at least one change type. The change type can be end-dated if it's not used in any change orders that have a workflow in progress.

To create a change type based on predefined types:

In the Setup and Maintenance work area, go to the following:

- Offering: Product Management
- Functional Area: Change Orders

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- Task: Manage Change Order Types

This table provides information on the predefined change types and supported features.

Change Type	Description	Supports Revision Control	Supports Audit Report	Supports Redline Modifications
Engineering Change Order	Used when tracking major changes during the design phase of the item. The revision number is automatically incremented when you make changes.	Yes	Yes	Yes. Displays the following modifications in redline: item detail, EFF, structure, AML and attachment.
Change Order without Revision Control	Used when revision control isn't required or when changes are minimum. For example, replacing an existing manufacturer part with a similar part supplied by another manufacturer.	No	Yes	Yes. Displays the following modifications in redline: AML, EFF, and item detail.
Change Request	Used when suggesting changes for a released item. For example, a supplier could request changes in certain specifications.	No	No	No
Deviation Change Request	Used when deviating from a process or specification for a specific time period. For example, suggesting the use of a substitute component as a temporary means of resolving an issue.	No	No	No
Commercialization Change Order	Used during the commercialization phase of the product. Can be created and edited in Product Information Management. Also available in Product Development as read-only.	Yes	No	Yes
Problem Report	Used to implement Quality Management for engineering design and development through Oracle Product Development Cloud. It's also required to enable supplier collaboration for	No	No	No

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Change Type	Description	Supports Revision Control	Supports Audit Report	Supports Redline Modifications
	issue identification and resolution. A problem report is a type of quality issue, such as a defect, deficiency, or a significant variation in a product's expected appearance or performance. This change type is applicable only for users in the Quality Management work area.			
Corrective Action	Used to implement Quality Management for engineering design and development through Oracle Product Development Cloud. It's also required to enable supplier collaboration for issue identification and resolution A corrective action is a type quality action to mitigate a quality issue and prevent its further occurrence. This change type is applicable only for users in the Quality Management work area.	No	No	No

Note: The 8D corrective action is 'inherited from' the predefined corrective action change type and hence you can't view it in the drop-down list of change types in manage change types.

Related Topics
- Define a Change Order
- View and Edit Change Details
- Create a Change Order and Submit it for Approval
- Use Predefined OTBI Dashboards for Changes and Items

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Define a Change Order

Here's the sequence of steps to define a change order.

1. Create the change order, giving it an appropriate name and purpose or description.
2. Assign items and documents that are affected by the change order.

   ○ Manufacturer parts can't be added to a change order; you must add a manufacturer part's associated or parent item.

3. Edit the item or document and modify their definitions:

   ○ Update the item or document attributes; or,

   ○ Modify the structure, in these ways:

     - by adding new structure components;
     - by withdrawing existing structure components; or,
     - by modifying structure attributes.

4. Check the impact of the change by analyzing the impacted products.
5. Adapt the change to impact the intended products only.
6. Define the list of approvers for the change - individual users or user group. If the user group is expanded into a comma separated list, the number of characters in the list should not exceed 2000.
7. Submit the change order for approval.
8. Approvers review and then approve or reject the change.
9. If rejected, rework the change and resubmit for approval.

To add an affected object to the change:

1. Open the Affected Objects panel.
2. Open the **Actions** list and select **Add**. Or use the **+** Add icon.
3. Search for appropriate items or documents.
4. From the returned search results, use the arrow to assign an affected object.
5. Save your modifications.

To change the revision of an affected object on the change:

1. In the row of the affected object, you can make a manual change to the revision.
2. Save your modifications to the business object.

To change the metadata attributes of a business object that's held on a change:

1. Select the affected object.
2. Open the **Actions** list and select **Edit**. The object's Details page displays.
3. Modify object attributes.
4. Save your modifications to the business object.

To change the structure of a business object that's held on a change:

1. Click the affected object.

   The object details page appears.
2. Switch to the item or document structure by clicking the **Structure** icon.
3. **Add** a new item or document structure component. Or, **Modify** or **Withdraw** an existing structure component.
4. Save your modifications to the business object.

Set Status on Changes

The list of default statuses that can be set from the Change Status button on changes depends on the workflow definition. The workflow in Product Development always has an Approval status.

- **Approval**: Select this status when you create the change order or change request and want to send it to reviewers for their review and approval or return.

- **Hold**: Select this status when the change must be withdrawn from active evaluation and review.

- **Cancel**: Select this status if you must delete the change order.

Related Topics
- Overview of Change Orders and Change Requests
- View Affected Objects and Change Operations

Create a Change Order and Submit it for Approval

Changes are created to modify an item. Use the Product Development work area to create a change order and submit it for approval.

Create a Change Order from Scratch

1. Use the Navigator to go to the Product Development work area.
2. Open the **Tasks** panel tab.
3. Click **Change Order** > **Create Change Order**.
4. From the Create Change Order window, select one of the predefined change types.
5. In the **Name** field, enter a name for the change order.
6. In the **Description** field, enter a brief description of the change order.

   Note: The Create dialog box also shows the required extensible flexfields as well as the ones configured in number assignment rules for the selected change type. For more information on number assignment rules, see the related links.

7. Click **Save and Close**.
8. Click the **Affected Objects** tab and then click Add Item.
9. Search for an item and click **Add** to add it to the list of affected objects.
10. Click **Save**. By default, the change order is in **Draft** status.
11. Click the **Change Status** button to move the Change Order from Draft status to Open status.
12. Click the **Approval** option in the Change Status list to submit the Change Order for approval.
13. Add Approvers, as needed, and click **Submit**.

You can enter other information to the new change or save it and later add more information.

Create a Change Order by Copying an Existing Change Order

From the **Actions** menu in a change order, use **Save As** to create a new change order of the same type or a different type. Here's what you can copy over from the existing change order: descriptive and extensible flexfields, attachments, affected objects, and relationships. Note that you can copy relationships only in engineering change orders and change orders without revision control.

Create a Change Order from a Change Request

From the **Actions** menu in a change request, use **Create Change Order**. Here's what you can copy over from a change request: affected objects, flexfields and extensible flexfields of affected objects, attachments, and relationships.

Related Topics

- Overview of Change Orders and Change Requests
- Define a Change Order
- Why am I unable to create a change order?
- Rules and Rule Sets

Manage Change Orders and Change Requests

You can search for and perform actions on changes using the Manage Change Orders and Manage Change Requests pages.

You can filter changes based on type and use other criteria to narrow your search results to the most relevant results. You can also use the **Add Fields** button to add more fields to the search criteria. The fields you add appear as columns in the search results table.

Here are some actions you can perform from the Manage Change Orders and Manage Change Requests pages:

- Add new change orders or duplicate existing ones.
- Delete change orders by adding them to a delete group. You can delete change orders that are in the **Draft** status. You can delete change orders that are in the **Canceled** status too, but a canceled change order with even one scheduled or completed line can't be deleted.
- Manage the change order workflow by using change order actions: Promote, Demote, Hold, Release Hold, and Cancel.
- Generate change order details report.

If you opt in to the feature Use Extensible Flexfields on Changes, Problem Reports and Corrective Actions, here's what you must know:

- **Search Filter**

  You can use this filter to search by a change type. The default search filter is set to **All Change Types**.
- **Saved Search**

  The default saved search is titled Application Default. This is executed when you select a change type.

  If you've created the saved search for a specific change type, you can view that after selecting the specific type in the drop-down list. If your saved search isn't restricted to a specific type, you must recreate it.

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- **Manage Watchlist**

    Use the Watchlist to track important business objects. The watchlist is categorized by the functional areas. Each item on the Watchlist page is made up of descriptive text followed by a count. Click the watchlist item to navigate to the object of interest.

    You can create your own watchlist items based on saved searches. Click the **Manage Watchlist** icon on the Manage Change Orders or Manage Change Request page. In the Manage Watchlist dialog box, select the check box **Include Saved Searches** to add the saved searches to the watchlist.

    You can use the Watchlist page in the Set Preferences work area (**Navigator** > **Tools** > **Set Preferences**) to determine which categories and items to show or hide in the watchlist.

    You can create watchlist for corrective and preventive actions and new item requests.

- **Add Fields**

    You can add extensible flexfields to the search criteria using the **Add Fields** button.

- **Search for Change Requests**

    When you search for the Change Request change type, the search results also include deviation requests.

Related Topics
- Using Commom Features Guide
- Implementation Reference Guide

View and Edit Change Details

A change order's General Information side tab is the starting point to access its basic information.

Here are some side tabs available on change orders (and change requests).

- **General Information** - the default or cover page of a change order.
- **Affected Objects** - items or documents that are the subject of the proposed change or modification.
- **Attachments** - text or graphic files, or URL, with more information about the change order; attachments are classified in a category.
- **Workflow** - the sequence of statuses through which the change order advances.
- **Impact Analysis** - impacted assemblies are those that are impacted by modifications to items or structures on this change order.
- **Relationships** - association between change order and another business object.
- **Security** - add team members to the change order; search and select by Person (user name) or by Role.

    When the role is expanded into a comma separated list, the number of characters in the list should not exceed 2000.

- **History** - a table showing the sequence of actions performed on the change order.

    The **Comment** column in the history table shows additional information about an action.

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The **Author** column shows **System** when an action is performed by the application.

It shows the user name when the action is performed by a user.

The table shows some of the actions performed by the application, and the entries in the **Comment** and **Author** columns:

Actions	Comment	Author
System	Items effective on approval: <items>	System
System	Can't be promoted	System
System	Autopromote from <old status name> status to <new status>	System

The table shows some of the actions performed by the user, and the entries in the **Comment** and **Author** columns:

Actions	Comment	Author
Created	Through item batch: Name: <batch name>, <batch number>	<user name>
Created	Through item batch ID: <ID> Note that this comment appears when the change is created through FBDI.	<user name>
Promoted to approval	<comments entered by the user when promoting the change for approval>	<user name>

Content Presence Indicators

When you open a change order, you can view blue side tabs, indicating the presence of content in them.

Icons for tabs that always have content or have content that is calculated upon selection are always gray in color. They include the General Information, Workflow, History, and Item Grade tabs.

General Information Tab

When you open a change order, the General Information tab is displayed.

You can fill in the change order number during creation, or, depending on the configuration, it can be generated automatically. Here are some attributes appearing on this tab:

- Descriptive and extensible flexfields set up by the administrator.

  Depending on the configuration, you can enter up to 4000 characters in the descriptive flexfield.

- Trading Partner Reference attributes such as Customer, Supplier, Manufacturer, and Source. These attributes also appear for supplier portal users.

Note:

- Use the Manage Change Header Attributes action in Additional Workflow Controls to allow or dissallow participants from modifying the general information.

- Affected objects in engineering change orders and change orders without revision control can include engineering objects.

- Affected objects in commercialization change orders can include engineering objects that are ahead of the design lifecycle phase, and non-engineering objects.

Attachments Tab

Click the **Attachments** side tab, the Attachments page displays. Files can be associated with this change order using the **+** Add icon or **Actions > Add**. If you select a listed attachment, the **X** Delete icon and **Actions > Delete** are enabled.

When you want to modify an attachment, you must first distinguish the purpose and place where the attachment appears. An attachment on a change order is a document that further explains something about the change order itself. This attachment can be modified directly, as long as the change order is in an editable status; there's no need for an additional change order.

Attachments on items are managed with the mechanism of a change order, in which proposed modifications to the attachment are described, reviewed, and approved, much like proposed modifications to the item's design or attributes.

Related Topics

- Secure Access to Changes
- Terminate and Restart a Workflow
- Replace a Component
- Configure Change Types

Edit Released Engineering Items

You can edit released engineering items by assigning them to a change order or using change order import. To modify the entire structure that contains the released item, you must also assign the parent item.

If you're using change order import, note that:

- You can modify the following: item general information, structure components, reference designators, substitute components, and AML.

- The feature is available only if you've opted in for the feature Enforce Change Control on Released Engineering Items During Import. This isn't applicable for commercial items and commercialization change orders.

  For more information, see the related topic on Item Batch Change Order Options.

Before you edit released engineering items, note that:

- You don't have to route the items through a change order if you're modifying the following:

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     ○ Preliminary engineering items that have never been added to a change order.

     For example, you can modify the AML through import map without a change order, if the item hasn't been assigned to any change order.

     ○ Item extensible flexfields and operational attributes that aren't change-controlled.

     ○ Attachments on the item.

- You must use a change order to modify released engineering items or structures through FBDI also.

- To avoid enforcing change control during migration or mass update, set the profile option EGP_CONVERSION_MODE to **Yes**. Remember to set it back to **No** after the process is complete.

- You can't delete AML from released engineering items using import maps or FBDI. You can do this through the UI or web services.

Related Topics
- Item Batch Change Order Options

Modify Assignee

If your workflow is stuck due to absence of the assignee, you can modify both assignee role and default assignee.

You can modify these fields on the following objects: change orders, change requests, problem reports, and corrective actions if they're stuck.

Before you modify the assignee role or the assignee, here's what you need to know:

- It's recommended that you always populate the **Assignee Role** field on the General Information tab so that the **Assigned To** user can add approvers during the approval workflow.

- The **Assignee Role** field can be edited in the Draft and Open statuses. If the object is in interim or approval status, you must terminate the workflow.

- To modify the **Assignee Role** and **Assigned To** fields, you must have the Manage Assignee privilege. You must also have permission to manage change header attributes as defined in the Additional Workflow Controls table in change type setup.

- If the assignee role isn't defined, the new assignee must have the BPMWorkflowAdmin privilege to terminate the workflow and reassign.

- If the assignee role isn't defined and the new assignee wants to reassign or delegate a task from BPM Worklist, the new assignee must have the BPMWorkflowSCMAdmin privilege to view all the approval tasks in Administrative Tasks.

- You can't edit the **Assignee Role** or **Assigned To** fields for objects that were added prior to the support of Additional Controls in update 20B.

- Only the **Assigned To** user can see the Terminate and Restart actions in the Actions menu. Ensure that a user name is provided in the **Assigned To** field.

Note: If you have modified the assignee's user name during a change order or new item request workflow, an error message appears. To resolve the error, terminate and restart the workflow.

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Related Topics
- Configure Default Assignee for Quality Issues and Actions

Take Action on Changes

Here are some of the actions available on the **Actions** menu of a change in the Product Development work area:

- **Change Order Details Report**: generate a report of the change order. You can choose a template, format, and locale. To generate this report, you must have the following roles:

  BI Consumer and EGO_GENERATE_ITEM_CHANGE_ORDER_REPORT_PRIV_OBI.

  > **Note:** If the column width in a multi-row table on the report exceeds the page width, the content is truncated in the PDF format. It's recommended to use the HTML format in such cases.

- **Delete**: mark the change order for deletion and add it to a delete group.

  You can create a new delete group or add the change order to an existing group. Note that you must perform this action from the Product Information Management work area.

  You must then confirm the deletion using Manage Delete Group available in the Tasks panel. The change order must meet the deletion constraints so that the affected object isn't used in any other structure.

  In case you want to again use the change order and it can't be deleted due to constraints, you can restore the change order using **Actions** > **Delete** on the Edit Delete Group page. For more information, see *Group Deletions of Items, Structures, New Item Requests, and Change Orders*.

- **Send Object**: works for items, documents, and change orders. A message about the business object is sent to another user.

  Messages displaying the list of recipients can be sent to a single user or multiple users. If there's a need to restrict a user from viewing the recipient list, it's recommended to send notifications to a single user.

- **Audit**: create an audit report on a change order. Select **Audit**, and select a status from the fly-out list. This generates the audit. (Which statuses are displayed depends on workflow definition.) Now, click the **Audit Results** side tab. The audit checks for any problem or violation of the entry or exit criteria on the Status changes in the workflow of the change order. The Audit Results lists all these as well as more general issues with the change order.

- **Download Attachments**: appears on the list when this change order has one or more attachments. Selecting the action opens a dialog box. You can choose from options and specify which attachments you want to include in your download.

- **Publish**: publish engineering change orders to an XML report. A process ID is generated for each report. To view the report, click **Tasks** > **View Scheduled Process** and enter the process ID.

- **Move Change Lines**: move the selected affected objects to a new change order within the same organization.

- **View Reports**: view and launch preconfigured reports for change orders.

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Related Topics
- View and Edit Change Details
- Move Change Lines
- Cancel Change Lines
- Replace a Component
- Where can I approve or reject a change order?
- Manage Attachments in Items and Change Orders

Add or Remove Participants from Future Status

You can add or remove participants from a future status in the workflow when the change is in draft, open, interim approval, approval, or scheduled status. Note that this depends on the permissions assigned in the additional workflow controls table.

Your participants include reviewers, approvers, and optional approvers.

To add participants to a future status, you must select the future status in the workflow and click **Add** in the Participants section.

> **Note:**
> - Your participants receive notifications which can be configured by your administrator.
> - A Claim button appears on the approval notification when multiple reviewers are added. If one of the reviewers claims the task, the others don't see any action buttons on the notification.

Current Change Status	For Future Approval Status	For Future Scheduled Status	For Future Completed Status
Open	Add or remove users and roles such as approvers, optional approvers, and reviewers.	Add or remove users and roles such as reviewers.	Add or remove users and roles such as reviewers.
Approval	N/A	Add users and roles such as reviewers.	Add users and roles such as reviewers.

Related Topics
- Actions You Can Control

Add or Remove Participants in Current Status

You can add or remove approvers in the interim approval and approval status. You can add or remove participants of type reviewers when the change is in draft, open, approval and interim approval, scheduled, or completed statuses.

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> **Note:**
> - Participants include reviewers, approvers, and optional approvers.
> - This is applicable for change orders, change requests, problem reports, and corrective actions.
> - Adding participants depends on the permissions assigned in the additional workflow controls table.

Here are some additional details:

- The newly added participants receive notifications. You're restricted from adding a role that has more than 40 members to the approval workflow if the **Response Required From** field is set to **All**. This happens when you promote the change. Also, automatic promotion is prevented. You'll see a new entry in the action log and a notification is sent to the analyst.

- Optional approvers can't be added when approval is in progress.

- Only the change analyst can remove approvers or reviewers in the current approval status.

- You can't add a role as an approver and a reviewer in the current interim approval or approval status. You can only add individual users.

- You can't remove the role.

- You can't remove approvers who have already approved or rejected the change.

- You receive an FYI notification if you're removed as an approver or reviewer in the current interim approval or approval status, and if you're removed from the approval group.
  - You can see the comments provided during the removal action in the notification.

  > **Note:**
  > - In BPM Worklist configuration, it's recommended that you make commenting mandatory when rejecting a change order so that rejection comments are captured.
  > - Comments are visible in the rejection notification for change orders, change requests, problem reports, and corrective actions.

Related Topics
- Why am I unable to add or remove approvers during the change order approval?
- Actions You Can Control
- View Product Management Notifications

Cancel Change Lines

If a change order is stuck due to an unforeseen reason, review the details in the History and Workflow tabs. Depending on the workflow, you can cancel the change order or change lines (or affected objects).

Here are some things you need to know before you cancel change orders and change lines:

Manually Cancel the Change Order

Use the Cancel Change Order action. Then the application cancels all change lines except the ones that are complete; the change order status is set to Canceled.

> **Note:** To cancel a change order in the interim approval or approval status, you need the reschedule change order privilege.

Manually Cancel the Change Line

Use the **Cancel** action.

If you cancel change lines in a Scheduled change order which is stuck because the effectuation post process job is stuck, a message appears that the change line is implemented and the line will be set as Completed, not Canceled. An entry is made in the change history and an FYI notification is sent.

Auto Cancellation of the Change Line

If the application detects an error when implementing or activating the change line, the change line gets canceled automatically. If this happens you notice:

- an entry in the History tab indicating which change line is automatically canceled.

- the change line status appears as Canceled.

To proceed with the change line, you can move it to another change order.

Factors that Determine Whether you Can Cancel Change Lines

The following factors determine whether you can cancel change lines or not.

- the header status in a change order

- the progress on the header status.

- If you aren't the analyst (assignee), you must be assigned with the BPMWorkflowScmAdmin privilege, regardless of the permissions defined in the additional workflow controls table.

  > **Note:** If you modify the assignee, you must assign the BPMWorkflowScmAdmin privilege to the new assignee.

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When Can I Cancel Change Lines?

The table shows the criteria to cancel change lines:

Header Status	Progress on the Header Status	Change Line Status	Cancel Change Lines?
Draft	Draft	Draft	Yes
Cancel	Cancel	Cancel	Not applicable
Open	Open	Open	Yes
Open	Open	Hold	Yes
Open	Open	Canceled (one line canceled)	Not applicable
Interim Approval	Interim Approval	Submitted for Approval	Yes

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Header Status	Progress on the Header Status	Change Line Status	Cancel Change Lines?
Interim Approval	Interim Approval	Approved	Yes
Interim Approval	Interim Approval	Rejected	Yes
Interim Approval	Interim Approval	Terminated workflow	Yes
Interim Approval	Interim Approval	Terminated Hold	Yes
Interim Approval	Interim Approval	Canceled (one line canceled)	Not applicable
Approval	Approval	Submitted for Approval	Yes
Approval	Approval	Approved	Yes
Approval	Approval	Rejected	Yes
Approval	Approval	Terminated workflow	Yes
Approval	Approval	Terminated Hold	Yes
Approval	Approval	Canceled (one line canceled)	Not applicable
Scheduled	Scheduled	Scheduled	Yes
Scheduled	Scheduled	Failed	Yes
Scheduled	Scheduled	Canceled (one line canceled)	Not applicable
Completed	Completed	Failed	No
Completed	Completed	Canceled	No
Completed	Completed	Completed	No
Interim Approval	Failed	Approved	Yes
Interim Approval	Failed	Submitted for Approval	Yes
Approval	Failed	Submitted for Approval	Yes
Approval	Failed	Approved	Yes

Header Status	Progress on the Header Status	Change Line Status	Cancel Change Lines?
Open	Canceled	Canceled (all lines canceled)	Not applicable
Interim Approval	Canceled	Canceled (all lines canceled)	Not applicable
Approval	Canceled	Canceled (all lines canceled)	Not applicable
Scheduled	Canceled	Canceled (all lines canceled)	Not applicable
Completed	Canceled	Canceled (all lines canceled)	Not applicable

Related Topics
- Why did the Scheduled change order get promoted automatically?

Move Change Lines

Here are a few scenarios in which you can move change lines or affected objects:

- The change order is stuck. Depending on the header status, you can move the change line to a new change order and proceed with the change.

- The change order is automatically canceled. Depending on the header status, you can still move the lines to a new change order.

Here are the factors that determine whether you can move change lines:

- The header status in a change order.

- The progress on the header status.

- The configuration for the move change lines action in Additional Workflow Controls for the change type.

  If you're on update 21C or later, note that this action isn't controlled by the Reschedule Item Change Order privilege.

The images show where the header status and the progress status are displayed:

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When Can I Move Change Lines?

The table shows the criteria for moving change lines:

Header Status	Progress on the Header Status	Change Line Status	Move Change Lines?
Draft	Draft	Draft	Yes
Cancel	Cancel	Cancel	Yes
Open	Open	Open	Yes
Open	Open	Hold	No
Open	Open	Canceled (one line canceled)	Yes
Interim Approval	Interim Approval	Submitted for Approval	Yes

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Header Status	Progress on the Header Status	Change Line Status	Move Change Lines?
Interim Approval	Interim Approval	Approved	No
Interim Approval	Interim Approval	Rejected	No
Interim Approval	Interim Approval	Terminated workflow	Yes
Interim Approval	Interim Approval	Terminated Hold	No
Interim Approval	Interim Approval	Canceled (one line canceled)	Yes
Approval	Approval	Submitted for Approval	No
Approval	Approval	Approved	No
Approval	Approval	Rejected	No
Approval	Approval	Terminated workflow	No
Approval	Approval	Terminated Hold	No
Approval	Approval	Canceled (one line canceled)	Yes
Scheduled	Scheduled	Scheduled	No
Scheduled	Scheduled	Failed	Not applicable
Scheduled	Scheduled	Canceled (one line canceled)	Yes
Completed	Completed	Failed	No
Completed	Completed	Canceled	Yes
Completed	Completed	Completed	No
Interim Approval	Failed	Approved	No
Interim Approval	Failed	Submitted for Approval	No
Approval	Failed	Submitted for Approval	No
Approval	Failed	Approved	No

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Header Status	Progress on the Header Status	Change Line Status	Move Change Lines?
Open	Canceled	Canceled (all lines canceled)	Yes
Interim Approval	Canceled	Canceled (all lines canceled)	Yes
Approval	Canceled	Canceled (all lines canceled)	Yes
Scheduled	Canceled	Canceled (all lines canceled)	Yes
Completed	Canceled	Canceled (all lines canceled)	Yes

Move Duplicate Change Lines

Here are some guidelines before you move duplicate change lines:

- If you need to move two or more duplicate change lines from one change order to another, you must select all lines and move them in a single action. You can't move such lines one at a time.

- If a change line is canceled in the target change order, then you can't move the same item again as a change line to the target change order. You must remove the canceled change line or move it to a different change order before you move the same item to the target change order.

Related Topics
- Actions You Can Control

Understand Role Expansion in Change Orders

In the change order's Approvers table, roles are expanded to show all members of the role only in certain cases.

- If the approver is a role and **Response Required From** is set to **All**, the role is expanded to show all its members.

- If the change is promoted to approval and the role has more than 40 members, it won't be expanded. You must delete the role to submit the change for approval.

- If only one response is required on a user-defined approval and roles have been added as approvers, the roles aren't expanded to show their members.

In either case, all members of the role receive notifications on completion of the change workflow, and you can track who signed off. Note that the Assignee field in the notification is also not expanded to show all role members.

Edit Reference Designators on Changes

You can enter reference designators directly inline on the structure tab of the affected object, or in the side panel view.

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If your implementor has configured a range indicator for reference designators, you can enter a reference designator range instead of entering each value.

Here's how you edit reference designators:

1. Navigate to the structure tab of the affected object on a change order.
2. Select the component for which you want to add or edit reference designators.
3. Edit reference designators directly in the **Reference Designator** column.

   Here's what you need to know:

   ○ To enter multiple values, use a comma-separated list of values, or a range, or a mix of both. For example, if your administrator has selected '+' as the range indicator, you can enter 'A1+A5' and the application will expand the range to create five reference designators: A1, A2, A3, A4, and A5.
   ○ You can click the expansion button '...' next to the reference designator cell to open a dialog box where you can view and edit the expanded values for the reference designators. The expansion button is only available for the row that's being edited. You can also enable or disable the quantity check and align quantity from this dialog box.
   ○ Use the drop-down list in the side panel to filter reference designator redlines. It includes the following options: **All**, **Added**, **Deleted**, **Modified** or **Unchanged**. By default, **All** is selected.
   ○ You can't edit the reference designators in the side panel, you can only edit the descriptive flexfields.
4. Click **Save**.

Manage Tasks in Change Orders and Change Requests

You can create a checklist of tasks related to the change order (or change request) and assign work to individuals.

You can make it compulsory for certain tasks to be completed by specified users before the change order can progress to a status.

Here are some more details on tasks:

- Your ability to manage tasks depends on the permissions for the Add Tasks, Remove Tasks, and Update Tasks actions in Additional Workflow Controls for the change type.
- You can mark the status of a task and assign tasks even after the change order is complete. Use this to manage post-completion tasks such as documentation or qualification of contract manufacturers. Note that only the change assignee can manage tasks in Completed status.
- The task can't be set as required if the **Complete Before Status** is one of the following: blank, first Open status, Scheduled, or Completed.

  Note: Status first Open indicates the first open status in case your administrator has configured additional open statuses.

Here are some examples of tasks:

- Prepare Functional Specification document.
- Review and update cost attributes of affected objects.
- Define regulatory attributes.
- Publish information to Marketing and Sales.

The Tasks table includes the following fields that let you specify task details:

- **Sequence**: Determines the order in which the tasks are performed. By default, this increments by 10.

- **Required**: Indicates that the task is compulsory for the change order to progress. If a task is compulsory, then a **Complete-Before Status** must be specified.

- **Assigned To**: Specifies the person to whom the task is assigned.

- **Assigned By**: Specifies the user who assigned the task.

- **Assigned On**: The date and time when the task was assigned.

Note: If the same task has been assigned by different users, the **Assigned By** and **Assigned On** fields show details of the latest assignment.

- **Start-by Status**: The status at which the tasks should be initiated. Includes current and future statuses, and a blank value. Use the blank value when you want the task to being irrespective of the change status.

- **Complete-Before Status**: The status before which the task should be completed. Includes future statuses and a blank value. Use the blank value to leave this field blank when **Start-by Status** is set to **Completed**.

- **Need-by-Date**: Indicates the date on which the tasks should be completed.

- **Task Status**: Can be updated only by the task assignee or the change analyst.

Copy Existing Tasks to New Change Orders

You can create a new change order based on an existing one, and copy over the tasks. Use the **Save As** action (in the change order). Tasks in the newly created change order are reset to the Open state.

Related Topics

- Why am I unable to update the task status in the change order?
- Understand Change Order Statuses

Secure Access to Changes

To secure a change order (or change request) from unauthorized access, you can add the users or roles who should have access to it.

To add users or roles:

- Click the Security tab in a change order.
- From **Actions**, click **Add**.

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> **Note:** If you're unable to add users, you must review privileges assigned to your role or create a data security policy
> for change orders. For more information, see related topics.

Users in the Product Development and Product Information Management work area can view and approve change
orders, whereas users in the supplier organization can only view and publish change orders.

Here are some things you need to know about a new change order:

- Until you restrict access, change orders can be accessed by all users including supplier portal users.

- If a new user or group is added to restrict access, the change order creator and assignee are added
  automatically.

- To remove the creator and assignee, use the **Delete All** option.

To enable users to view or approve change orders, an administrator must also provide the necessary privileges.

When you search for a change order using any criteria, the search results show only the change orders that you're
allowed to view.

Track Modifications Made to the Security Tab

You can also track modifications made to the Security tab of a change order (or change request) by using the View Item
Audit Trail report. Use the report to see who added or deleted entries in the list of users and roles.

1. From the Tasks panel tab, click **View Item Audit Trail**.
2. On the Audit Reports page, select the search criteria:

   o In Product, select Product Hub.

   o In Business Object Type, select **Change Object Security**.

   o Click **Search**.

Related Topics
- Troubleshoot Issues in Change Objects

Impact Analysis in Change Orders

You can launch an impact analysis from the Impact Analysis side tab on a change order or change request.

Start the impact analysis from an impacted product. Use either of the following:

- From the Impacted Product panel look into the details for a specific impacted product.

  Filter the multilevel item structure of the product, to see only that part of the item structure that is impacted by
  the change. Thus, it is easier to focus on the relevant part of a larger item or document structure.

- Go to the Affected Object panel, select a specific affected object, and start an impact analysis from the toolbar
  icon or Actions menu.

View the list of impacted products, and analyze why the product is impacted. Understand how many affected objects
impact the product. Adapt the change definition to achieve the intended list of impacted products. The impact analysis

opens the affected assembly and displays where the modified object exists in the impacted structure. The change order originator and reviewers may use this impact information for decisions about the proposed changes.

Change Order Notifications

Notifications are sent to assignees throughout the lifecycle of the change order.

For a detailed list of new item request notifications, notification types, and recipients, refer to *View Product Management Notifications* available on the Oracle Help Center.

Here's when the notifications are sent:

- When a change order is submitted, notifications are sent out to assignees, approvers, and the requester.
- When you start a step, notifications are sent to each of the assignees of the step.
- When the change order is approved or rejected, a notification is sent to the creator, and approver.

Notifications are of the following types:

- Task notifications are sent out to the assignees of each task.
- FYI notifications are sent to the creator, assignee, requester, and approver of change order lines and headers when it moves to Scheduled or Completed Status.

Important Considerations about Notifications:

- FYI notification is sent if you're removed as an approver or reviewer for the change that is in the current interim approval or approval workflow status.
- FYI notifications are sent to all the removed participants of the approval groups.
- FYI notification shows who has rejected the change order approval request and the rejection comments for the same.
- Comments are visible in the rejection notification for change orders, change requests, problem reports, and corrective actions.

    You can see the comments provided when you are removed as a workflow participant.

Note:

- If the approval notifications are delayed ensure that approvers have the following role:
  EGO_GENERATE_ITEM_CHANGE_ORDER_REPORT_PRIV_OBI

- The assignee in the notification refers to the users who are part of the approval groups. If your role is designated as the workflow status participant, the Assignee field of the FYI notifications displays your role, instead of your user name.

- Sometimes, unanticipated issues prevent the workflow from getting completed as expected, and terminating a workflow maybe inevitable. You can stop an approval routing workflow, even if it isn't completed using Terminate Workflow. Related notifications, if any, are removed from the assignees' work lists.

- In BPM worklist configuration, it's recommended that you make commenting mandatory when rejecting a change order so that the rejection comments are captured.

Note:

- Workflow participants (approvers, optional approvers, and reviewers) don't receive FYI notifications for change workflow events that aren't relevant to them.

  Only participants added to the current and previous workflow statuses receive notifications when:

    ○ The change is rejected or completed.

    ○ Autopromotion fails.

- Participants added to future workflow statuses or skipped workflow statuses don't receive FYI notifications for these events.

- If the change moves through a status and is demoted, participants of the status through which the change moved will receive a relevant FYI notification.

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Note:

- The number of affected objects displayed in an email notification depends on a threshold.

  If the number of objects exceeds this threshold, a link to the change order page is provided so that you can navigate to the object and view the full list.

  For change order approval task notifications, the threshold is 25.

  For FYI notifications, the threshold is 100.

- A predefined request comment notification is associated with the **Open** status. The change order can't move to the next status until this notification has a response. The notification is then sent automatically to the assignee and the requester.

  This automatic notification can be bypassed by removing the assignees. If the notification is bypassed and the BPEL process is set to automatically promote, then the change order automatically moves to the next status. Otherwise, you need to manually move the change order to the next status.

- Change order notifications aren't sent for the following actions:
  - Skip Current Assignment
  - Suspend
  - Create Subtask
  - Request Information
  - Route Task
  - Add Comments

Related Topics

- What Change Orders Modify
- Understand Change Order Statuses
- View Change Order Notifications

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Publish Change Orders

Publication enables you to schedule and publish engineering change orders.

You can publish engineering change orders as an XML package. Use filters to select the type of change data you want to publish, including attachment files.

> **Note:** You can retrieve the publication files from Oracle WebCenter Content programmatically, or by using the **File Import and Export** option available in Tools of the Navigator.

Here's how you publish an engineering change order:

1. In the Product Development work area, select an engineering change order in the **Completed** status.
2. Open the change order that you want to publish. Click **Actions** > **Publish**. You can also choose the publication action from the Manage Change Orders page.
3. Select the entities that you want to publish in the Change Publication Criteria box. You can choose either some or all the entities from the list.
   - Affected objects
   - Header attachments
   - Affected object redlines only
   - Affected object attachments
   - Affected object structures
   - Affected object AML

   > **Note:** The Include attachment files check box is enabled only when you select an entity that includes attachment.

4. Click **Publish**. A confirmation box is displayed with the process number.
5. To see the report, click **Tasks** > **View Scheduled Process**.
6. Enter the Process Id in the View Scheduled Processes window.
7. Click **View Output** to download the published engineering change order. The output is available in a zip file format. Click the file to download it.

> **Note:** You can automate the publishing of engineering change orders using SOAP web services. You can also use the Item Publication event - `PublicationJobCompleted` to determine if a change order is published and automate the additional steps.

Related Topics
- Refer to support note: Doc ID 1334471.1 Sample Soap Requests for Use in WebCenter Content (WCC/UCM) 11g Calls to the GenericSoapService
- Refer to support note: Doc ID 2885473.1 Invoke, monitor and download the change order publication using SOAP Web services

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View Published Change Order Reports

You can access the published file in XML format from the Oracle WebCenter Content.

Publication files for change orders are published to the FAImportExport Security Group root folder in Oracle WebCenter Content instead of the Contribution Folders location to avoid any limitation in the number of files that can be stored.

Use a Change Order to Redline an Item Structure

Redlining is the process of marking modifications to an item or structure that must be approved to be implemented. This topic describes how to use a change order to redline an item structure.

To use a change order to redline an item structure:

1. Use Navigator to go to the **Product Development** work area.
2. From the Tasks panel tab, click **Create Change Orders**.

   - From the Change Type list, select a type of change order.
   - In the Name field, enter a name for the change order.
   - In the Description field, enter a brief description.
   - Click Save and Close.

3. Click the **Affected Objects** side tab.

   - On the change order, click **Select and Add** to search for and add the affected object so that you mark it for modification.
   - Go to the **Structure** tab. From the results, select an item row.
   - Go to the X icon and select Withdraw to withdraw the item from the structure.
   - Click OK.

4. Now you must add a new item to the Structure.

   - Click the **Create** icon.
   - Select a class from the **Class** list.
   - In the dialog, enter a name in the **Name** field.
   - Enter a description in the **Description** field.
   - Click **Save and Close**.

     You can view the saved modifications in the summary of changes.

Related Topics
- Watch Video: Use a Change Order to Redline an Item Structure

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Use a Change Order to Add a Manufacturer Part to an Item

This procedure creates a change order, adds an item, and associates the item with a manufacturer part.

1. Use Navigator to go to the Product Management work area. From the list of offerings, click Product Development.
2. Create a change order, using the following steps:

   - From the **Tasks** panel tab, click **Create Change Order**.
   - In the **Create Change Order** dialog, select a change type. Click **Save and Close**.
   - Enter the following details for the change order: number, name, and description.
   - Select the priority.
   - Click **Save and Close**.

3. Add the item as an affected object to the change order, using the following steps:

   - Click the **Affected Objects** side tab and click **Select and Add**.
   - Enter the item name and click **Add**.

4. After the item is added as an affected object, select the item and click **Edit Affected Object**.
5. Edit the item to add the manufacturer part, using the following steps:

   - On the **Edit Item** page, click **AML**.
   - Click **Select and Add** to add the manufacturer part as a recommendation.
   - Select the manufacturer name, part number, status, and context. Click **OK**.

     The manufacturer part is highlighted and includes a plus icon to indicate that it's a new assignment.

     Note: The change order must be approved for the manufacturer part to be implemented.

   - Click **Save and Close**.

Related Topics
- Watch Video: Use a Change Order to Add a Manufacturer Part to an Item

How Application Validates Change Assignee

When you promote or demote a change order (or change request) to the next status, an additional check validates whether the assignee is an active user. This check is performed for each status up to Approval status.

If the assignee isn't an active user, the promotion doesn't proceed. Demotion will proceed, and an entry is added in the action log.

During manual or automatic promotion to Open status, if the application detects that the person who initially requested the change is an inactive user, the change isn't promoted.

During demotion, if the assignee is found to be an inactive user and Skip Request Comment is disabled, the Request for Comment notification isn't sent. A corresponding entry is created in the action log. In this case, the user must choose an active user as the assignee and then promote the change manually.

How Revision is Calculated for Engineering Change Orders

Here's how the next higher item revision number in an engineering change order is calculated.

In releases prior to 20D, only the past, current effective, or future effective (change order is scheduled) revisions were considered.

From release 20D onward, all revisions (past, current effective, future effective, and pending) are considered when searching for the highest existing revision number. Instead of retrieving the item revision with the furthest future effectivity date, the application retrieves the item revision that was created most recently.

Here's how this impacts application behavior (from release 20D onward):

- The item revision identified as the base revision for new revision calculation changes because the application evaluates the creation date of the item revision instead of the effective date. In case the calculated item revision is already used, the application doesn't blank out the item revision number, but continues to increment the new item revision number until it finds an unused number, so the user doesn't have to enter a number manually.

- The algorithm to calculate the next higher revision number supports up to 18 characters.

Note: When you add an item as an affected object to a change order, its revision is automatically bumped up. But revision field remains blank when the bump-up mechanism fails to calculate the next higher revision in the following actions: Assign to Change Order on an item, and Save As on a change order for creating an engineering change order. When you access the Attachments tab on the change order, a message informs you to specify the new revision before you can view attachments. If you don't specify the revision, you're prompted to specify it when you promote the change order for approval.

How Item Approval Privilege is Validated at Role Level

Make sure any role that you add as an approver, or a parent role, has the Approve Item Change Order privilege assigned.

When a role is assigned in the approvers panel of a change order (or change request), and the change is submitted for approval, the application checks whether the Approve Item Change Order privilege (EGO_APPROVE_ITEM_CHANGE_ORDER_PRIV) is assigned to the role (directly or through role inheritance). If it isn't, an error is shown.

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FAQs About Change Management

How do I add an item or document as an affected object?

Open the item or document and select **Assign to Change Order** from the **Actions** menu.

What's the difference between an affected object and a change line?

Both the terms indicate an object affected by the change order.

Affected object is used in the Product Development work area and Simplified Change Management Interface.

Change line is used in the Product Information Management work area.

How can I create a new change order based on an existing change order?

You can use the **Save As** action to create a new change order. In the Create Change Order dialog box, you must select the change type for the new change order.

Here's what you need to know before you before using the **Save As** action:

- Depending on the work area, you can choose to copy over the existing descriptive and extensible flexfields, contextual attributes, attachments, tasks, and affected objects.

- In the Product Information Management work area, you can save the change order to any type of commercialization change order.

- In the Product Development work area, you can save the change order to an engineering change order or change order without revision control.

- To copy over the descriptive and extensible flexfields select the **Additional Information** option in the **Save As** dialog box.

What's the difference between Withdraw and Remove?

Use Withdraw, to delete a component that was added before the item was assigned to the change order.

Use **Remove**, to delete a component that was added after the item was assigned to the change order.

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How can I view the list of change orders that are on hold or canceled?

You can use OTBI to generate a report listing change orders that are on hold or canceled.

How do I add items or documents to an existing change order?

With a change order open, click the Select and Add button to add existing items or documents, or click the Create button to add new business objects.

What's the difference between cancel and terminate actions in a change order?

Use cancel to stop further processing of the change order. You can still move the change lines to a new change order and retain redlines.

Use terminate to temporarily pause the workflow and resume it in the same change order.

Related Topics
- Terminate and Restart a Workflow
- Cancel Change Lines

Why am I unable to modify the change order?

The change order is in an Interim Approval status and the Allow Updates option on the Interim Approval status has been disabled. Or, you only have privileges to view the change order.

Where can I approve or reject a change order?

Use one of the following to approve or reject the change order:

- Bell icon
- The change order page
- Home page of the Product Development work area
  Select the My Changes information tile. Click **Approve** or **Reject** appearing against the change order.
- Email notification
- BPM Worklist

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You can approve multiple change orders from BPM Worklist. But the signature policy for change orders must be disabled.

- In Things to Finish section on the home page

Related Topics
- Configure the Signature Policy for Change Order Approval

Why am I unable to edit the change order?

If the change order is created in Product Information Management, you can't edit that in Product Development. Conversely, the change order created in Product Development can't be edited in Product Information Management.

How can I find out who acted on a change order and the changes they made?

Open the History tab of a change order or change request to see the sequence of actions recorded for that object. You can see who has performed each action along with the time stamp and the details about each action.

For example, you can see who approved the change order and the approval comments.

Why did the change order approval prompt for a comment and password?

Your administrator configured the comment and password fields as compulsory for the purpose of audit. Enter your sign-in password.

How can I restart the change order workflow which is on hold when the approval is in progress?

From the **Actions** menu, click **Restart Workflow**.

Note: You can't restart the workflow using **Continue**.

What's the difference between an engineering change order and change request?

Both the change types permit you to route items and documents through a workflow.

The engineering change order lets you markup the required changes and the changes become effective on approval. But the change request doesn't provide any markup.

Why did the Scheduled change order get promoted automatically?

Since the Autocomplete on Cancel option is enabled by default from update 23A, all scheduled change orders move to the Complete status on cancellation of the last change line. This is applicable to new and in-progress change orders.

Let's say that the first three change lines are complete, and the last change line is stuck in the Scheduled state. You cancel the scheduled change line, and the change order moves to the Completed status.

Related Topics
- Create Problem Reports and Corrective Actions
- Understand Change Types

Why did the change order fail on approval?

Open the History tab of the change order to review the sequence of actions on that change order. Depending on the action performed, the application displays a comment.

For example, if you try to promote two change orders simultaneously and the effective dates are less than 30 minutes apart, then a comment appears advising you to maintain a time difference of more than 30 minutes. You can also see the Workflow tab to review the change order status.

Related Topics
- Cancel Change Lines

Why am I unable to add or remove approvers during the change order approval?

You must be assigned with the add participants and remove participants actions in the additional workflow controls for the change type.

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Additionally, the value of **Response Required From** (in the change type) must be set to **All**.

Why did the change order workflow restart automatically?

If the schedule processor job is stuck in the initial run and it doesn't require any user intervention, the application restarts the job. It restarts up to 5 times with increasing time gaps in between each job.

You don't need to manually search for unsuccessful change orders that weren't processed due to locked affected objects.

> **Note:** An item can be simultaneously updated from different sources. A record can be updated through the user interface, while another update could be triggered through a web service or scheduled process. This results in locking issues, and the jobs can't be complete successfully. In such scenarios, the application restarts the subsequent job after some wait time and attempts to complete the job.

How can I remove a participant from the change workflow?

In the Change Status dialog box, select the participant and click **Delete**. You can also perform this action from the Participants section on the change Workflow tab.

> **Note:**
> - Your ability to remove a participant depends on the permissions assigned in additional workflow controls for the change type.

How can I do a bulk upload of change order attachments?

You can do a bulk upload of change order attachments using REST services.

Here are a few things to keep in mind:

- The change order must be in draft, open, or interim approval status, and

- In the change type, the **Allow Updates** option must be selected against the status.

Refer to the REST API for Oracle Fusion Cloud SCM guide for more information about using these REST APIs.

Why am I unable to update the task status in the change order?

You can only update the status for the tasks that are assigned to you. But your change analyst can update the status for all tasks.

How many objects can I add to a change order or new item request?

The default limit is 50 and the maximum is 100. Your administrator can change the default limit for:

- The number of change lines or affected objects in change orders, and
- The number of items in new item requests.

Here are some additional details:

- When you exceed the limit while adding items through the user interface, an error message appears.
- When you import a large number of items in a batch, you can choose to automatically split items and create new change orders or new item requests.

Related Topics
- Item Batch Change Order Options
- Item Batch New Item Request Options
- Configure the Limit for Objects in Change Orders and New Item Requests

Can I set a default priority for my change order or new item request?

Yes. You must set the default priority for a change type or a new item request type. The priority is inherited when you create a new change order (based on the type) or new item request.

Use the following tasks from the Product Management Offering in the Setup and Maintenance work area:

- Manage Change Order Types
- Manage New Item Request Type Details

To set the default priority, use the **Priority** field.

What actions can I take on a change order when it's in the Completed status?

As a change analyst, you can take the following actions when the change order is in the Completed status:

- Manage change header attachments
- Manage change header attributes
- Manage relationships
- Manage security
- Add tasks

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- Remove tasks

- Update tasks

- Move change lines

Related Topics
- Move Change Lines

In a change type, can I configure additional controls for the Draft status?

No. But you can configure additional controls for Open, Approval, Interim Approval, Scheduled, and Completed status.

Related Topics
- Control Actions by Participants

How can I know whether the entire change order (or new item request) was rejected or if a few items were rejected?

The approval notification provides details of whether the entire change order (or new item request) was rejected, or if a few items in the change order (or new item request) were rejected.

How can I set the reason code field on a change as a required field?

You can opt in to the Simplified Change Management Interface feature and then use Page Composer to edit the Reason Code field component and set it as required.

Related Topics
- Watch Video: Use Page Composer to Modify Interface Pages

Where are the change header attributes and change descriptive flexfield attributes displayed?

In the Product Development work area and Simplified Change Management Interface, the change header and descriptive flexfield attributes are available on the General Information tab of the change order.

Examples of change header attributes: Number, Name, Description, and Reason Code.

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How do I know whether my approval is required or optional for a change order?

In the approval notification, the **Activity Type** field indicates whether you're an approver or an optional approver.

Why should I claim the change order approval?

The **Claim** action enables you to review and approve the change order before another user in the role attempts the approval.

This is because your administrator assigned the change order approval to a role and set the value of **Response Required From** as **One**. So one response from a user in the role is sufficient for approval. Note that an approval notification is sent to all users in the role.

Can I create a change order without adding affecting objects?

Although you can create a change order without adding affected objects, you can't route it for approval. But you can create a change request without adding affected objects and route it for approval.

Can I configure extensible flexfields for a change order?

You can configure extensible flexfields for a change type so that these fields appear at the header level on the change order.

Related Topics
- Configure Extensible Flexfields for Change Types

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9 Affected Objects and Redlines

View Affected Objects and Change Operations

The Affected Objects page provides the following views:

- Redline Summary
- Manage Affected Objects

You can toggle between the Redline Summary View and the Manage Affected Objects view.

Redline Summary View

Displays links to Affected Objects and Change Operations.

Affected Objects provides a summary of redlines for each object. For instance, when you replace a component, the summary tab shows that the original component redlined and the replacement component in green (which is different from the initial color).

Change Operations provides a detailed list of modifications that have been done during the progress of a change order.

If you modify both an attribute of an affected object and its structure, two change operations are displayed in this view.

Change operations are recorded on items, AMLs, structures, attachments, and reference designators.

The table shows the change operations recorded on object types.

Object	Change Operations Recorded
Item and Attachment	Modifications
Structure	Modifications and withdrawals
Reference Designator	Additions, withdrawals, and modifications.

Manage Affected Objects View

To perform an action on affected objects, select the affected objects and click the **Actions** drop-down list.

> **Note:** When you update an affected object directly on the item page, a message appears informing you to use an existing change order or create a new one to update the item.

Here are some additional details about affected objects:

- The presence of a **Has Redlines** icon (or a red dot icon) against an affected object indicates that the item has redlines.

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- To filter a large list of affected objects, you can use **Query by Example**.

- **View Scheduling and Activation Reports**: You can view the process ID of the change order scheduling and activation processes; it includes hyperlinks to reports in the first 72 hours of report generation. Later on, only the IDs appear.

- **View Additional Item Details:**

  In the Affected Objects table, each item appears with an information icon (orange triangle) to indicate that additional information is available. You can click it to bring up a panel with details such as item name, class name, description, status code, revision code, and primary UOM. You can also drill down directly to item details using the hyperlinks in this panel without losing the change context.

- **Fill in Attributes:**

  You can quickly replicate a just-modified attribute or attributes in the Affected Objects tables on change orders, change requests, problem reports, and corrective actions. To do so, use the following actions:
  - **Fill Up** (Ctrl+U)
  - **Fill Down** (Ctrl+D)
  - **Fill Selected** (Ctrl+S)

  For example, you modified the value of an attribute, but you have more items with the same attribute that need the same change.

  To populate similar changes in a consecutive range of rows, use actions **Fill Up** (Ctrl+U), and **Fill Down** (Ctrl+D). Remember that you've to select the table cell and modify the value in the cell for Fill Down and Fill Up to work.

  To populate changes in nonconsecutive rows, select the required rows and then select **Fill Selected** (Ctrl+S) from the actions menu.

Freeze Structure Columns on Change Orders

You can select and freeze a single column or a group of columns on the change affected objects structure table. This enables you to easily work with data in large item structures and review different parameters against the item number while retaining the context of the frozen column. Note that you can only scroll through the columns to the right of the frozen columns or scroll through the columns that come after the frozen columns.

You can't freeze individual columns within an attribute group (for example, Component Details, Purchasing); you must select the complete attribute group. This is applicable on the structure view of commercial items and on the structure view of affected objects on changes. Here's how you freeze a column:

- Click the **Affected Objects** tab on the change order and then click the item.

- Click the **Structure** tab of that item.

- Select the column you want to freeze and click **Freeze**.

Related Topics
- Can I edit context specific attributes (or descriptive flexfields) on a change order?
- Replace a Component

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Redlines in Change Orders

Redlines are the individual changes on items and on reference designators that display mark-up. They're indications of recommended, modifications, additions, or deletions (withdrawals).

Any modification to a single item attribute is counted as one redline. The same is true whether you're adding or withdrawing an element to a structure.

Any modification to an existing structure attribute counts as a single redline. So, modifying the content of the reference designator attribute is one redline, and changing a second attribute counts as a second redline.

Redline information for item extensible flexfield attributes are shown in the **Additional Information** tab, next to the Summary tab. The Additional Information tab appears only when redline information exists for extensible flexfields.

> **Note:** Validations aren't executed on extensible flexfield attributes that aren't redlined in a change order.

Merge Redlines Through Import

You can incorporate redlines coming in through import into existing affected items on a change order. This helps in reducing the number of outstanding changes, stuck changes, and overall change order cycle time. This is supported for engineering change orders and change orders without revision control.

You can import redlines and merge these with existing redlines on engineering items that are assigned to a change order. You can do this as long as the change is in draft or open status. The following modifications can be merged:

- Item general information
- Item structure components
- Reference designators
- Substitute components
- AML

For more information, see the related topic.

Redlines in Multi-Row Attributes

When you delete a row in an attribute, the row is immediately removed. However after you save the changes, the row appears as redlined.

Undo Redlines

In structures and AMLs, you can undo redlines resulting from addition, deletion, and modification of components and manufacturers

Here's how you undo redlines in a structure.

1. Open the change order and navigate to the item structure page.
2. Select the rows in which you want to undo the redline and click **Undo Redline**.

   An Undo icon appears against the rows you selected.

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The following screenshot shows the icon against redlines from deletion, modification, and addition:
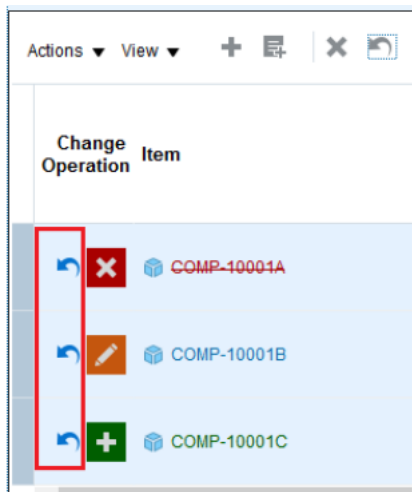
Note: You can also cancel the undo redline action. Select the row in which you want to cancel the undo action, and again click **Undo Redlines**.

3. Click **Save**.

Note: The undo action is complete only after you click **Save**.

Troubleshoot Missing AML Redlines

Prior to update 23D, AML redlines weren't being captured correctly on a few change orders because the date attribute values weren't synchronized. From update 23D onward you can run the Upgrade Product Management Data scheduled process to resolve this issue:

To update start date values for AML, run the Upgrade Product Management Data scheduled process with the following settings:

- Upgrade Process: Execution

- Functional Area: Item Relationships

- Feature: Update start dates on AML and display redlines

- Commit size: 10

To see which AMLs need to be fixed, you can run the same job with the upgrade process set as Analysis instead of Execution.

Related Topics
- Item Batch Change Order Options

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Specify Effective Date for Affected Objects

An affected object can become effective on completion of the change order workflow, or on a future date.

Here's what you need to know about revisions in affected objects.

- If an object is assigned to multiple change orders, each revision must have different effective dates. For example,
  Revision B resulting from change order B001, can be effective January 1.
  Revision C resulting from change order C001, can be effective January 6.

- When assigning an affected object to a change order, you select the particular revision that you want to modify, and also enter the new revision for the modified object.

- The revision you want to modify includes either of the following:
  - Revision that's currently effective. Note that you can't select a revision that's pending approval.
  - Revision that's scheduled to be effective in future and resulting from a change order in the Scheduled status.

Here's what you need to know about the effective date:

- The effective date for the modified version must include a date that's in-between the existing effective dates. For example, revision B can be effective January 1 and revision C can be effective January 6. So the modified version can include an effective date January 4.

- To ensure that item rules run effectively when you update rows in the affected objects table, the application prompts you to save changes to lifecycle phase and effective dates separately.

  Note: On saving the change order after first modifying lifecycle phase and then modifying the effective date, the application prompts you to save lifecycle phase changes before saving effective date. If you first modify effective date, the application prompts you to save effective date changes before saving lifecycle phase changes.

- When you use the **Fill Down**, **Fill Up**, and **Fill Selected** functions to save effective date changes across multiple rows, the changes are automatically saved separately. So you won't see a validation message if you modify lifecycle phase values immediately after that.

Resolve Revision Conflicts

An affected object can be assigned to multiple change orders.

When you add an item as an affected object to a change order, its current revision appears in the Old Revision column and you can provide the new revision in the New Revision column.

If the same item is already assigned to another change order, another revision is created in parallel. When you complete one of the change orders, the application detects a conflict for the other change order. When this happens, you're prompted to resolve the conflict.

Here are some examples to show you what causes revision conflicts and how to resolve them.

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Scenario 1

Let's say you've assigned the same item to two change orders, CO1 and CO2.

- CO1 is in Open or Draft status and is set to be effective on a future date.

  Old Revision is **A** and **New Revision** is **B**.

- CO2 is set to be effective immediately.

  Old Revision is **A** and **New Revision** is **C**.

  Now you approve and complete CO2.

Later, when you complete CO1 which has its old revision set as *A*, the application detects a conflict because CO2 is already effective with revision as **C**. A message appears asking you whether you want to change the old revision value.

If you click **Yes**, CO1 is put on hold and a batch job is created to correct the revision. On successful completion of the job, the initial revision on CO1 is changed to **C**, hold on CO1 is removed, and you can then promote CO1.

Here's an image that shows old and new revisions before you resolve revision conflicts.

Here's an image that shows old and new revisions after you resolve revision conflicts.

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The flowchart shows how revision conflicts are resolved when one of the change orders is in open or draft status:
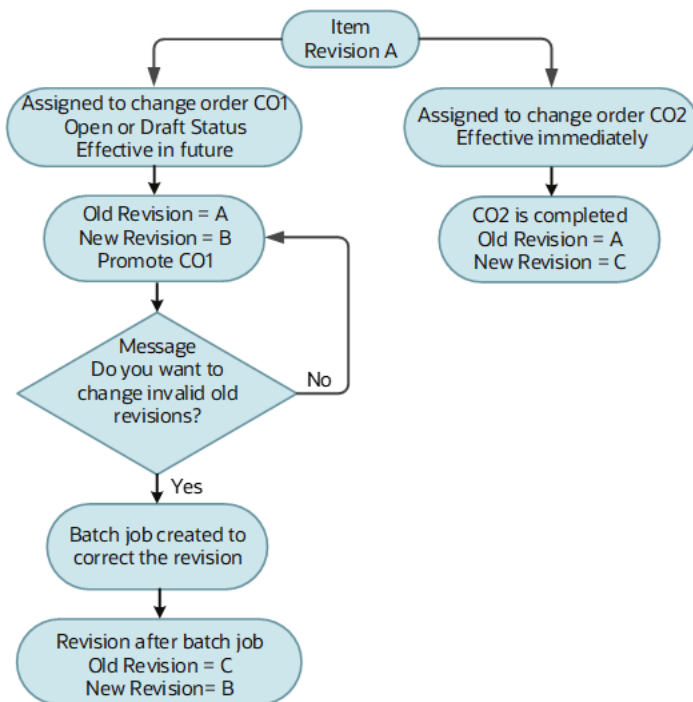
Scenario 2

Let's say you've assigned the same item to two change orders, CO1 and CO2.

- CO1 is in Approval or Interim approval status and is set to be effective on a future date.

  Old Revision is **A** and **New Revision** is **B**.

- CO2 is set to be effective immediately.

  Old Revision is **A** and **New Revision** is **C**. Now you approve and complete CO2.

Later, when you complete CO1 which has its old revision set as **A**, the application detects a conflict because CO2 is already effective with revision as **C**. A message appears informing you to demote the change order to open status and resolve revision conflicts.

To demote CO1 to open status, click **Change Status** > **Open**.

Note: From this step onward, the process is similar to the previous scenario.

To resolve revision conflicts:

From the Affected Objects tab on CO1, click **Actions** > **Resolve Revision Conflicts**.

Change order CO1 is put on hold and a batch job is created to correct the revision. On successful completion of the job, the initial revision on CO1 is changed to **C**, hold on CO is removed, and you can promote CO1.

How to Resolve Conflicts Manually

Click **Actions** > **Resolve Revision Conflicts**, on the affected objects tab of the change order. Note that in the scenarios listed in this topic, you select the change order which is open, draft, approval, or interim approval status.

What's Carried Forward in the Resolved Revision

The modifications made to AML, description and structure are carried forward from the valid old revision to the new revision (when conflicts are resolved). Note that attachments aren't carried forward.

FAQs About Affected Objects and Redlines

How do I know whether an affected object has redlines?

Navigate to the Affected Objects tab of the change order to identify redlines.

- The presence of a **Has Redlines** icon (or red dot icon) against an affected object indicates that the item has redlines.
- Click the item to open it. If any of its side tabs contain redlines, the side tab icons are highlighted for easy reference. For example, the **Structure** icon changes to a **Structure-Has Redlines** icon with a blue highlight.

Related Topics
- View Affected Objects and Change Operations

Can I edit context specific attributes (or descriptive flexfields) on a change order?

Yes. In the Affected Objects tab on a change order, use the Context Segment drop-down list to select the segment configured for the change type. The configured attributes appear next to the segment.

Note: If you're a supplier portal user, you can view the context specific attributes depending on the change type configuration.

Related Topics
- Configure Context Specific Attributes for Change Types

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10 **Workflows**

Workflows in Product Development

Workflows provide a mechanism to submit change orders and change requests for review and approval. You can use workflows to manage business objects such as items and documents.

The type of the change order determines the kind of workflow. You define entry criteria for the workflow to enter a particular status; define exit criteria for advancing the change order to the next status.

The Workflow tab in a change order documents the progress of status changes. To view the details of a status, select the status.

The History tab records the sequence of actions performed on the change order.

After the edits are made to attributes and structure, the change order can be submitted to a formal workflow to be approved. Once the change order is approved, the item's revision is changed according to the scheme defined by the administrator using the system's automatic naming.

Related Topics

- Define a Workflow
- Approve or Reject a Workflow
- How can I learn of problems with the statuses in my change order's workflow?
- Why is the change order workflow status in the wrong place in the order sequence?

Define a Workflow

When the administrator defines a change type, the process includes the definition of the workflow that will be available when you create a change order of that type.

Define the Sequence of Statuses

You can define individual status to be used in the workflow, but each status must be derived from standard Status Types:

- Open
- Interim Approval
- Approval
- Scheduled
- Completed

Every workflow has at least the following statuses by default:

- Open

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- Approval

- Scheduled

- Completed

You can define multiple status of the types Open and Interim Approval. However, the statuses of type Approval, Scheduled, or Completed can each occur only once in a workflow.

A workflow for a change order always begins in Draft status after it has been created.

Transition of Status

To execute a status transition, use the change status option in the change order workflow.

If there is a problem in changing a workflow's status, running an Audit Report of the change order may indicate issues with status Entry and Exit criteria.

Hold and Cancel Statuses

A workflow can be put on **Hold** with the Hold status option. Later this workflow could be resumed by moving it to another status.

A workflow can be canceled with the Cancel status option. However, once the **Cancel** status is set, this workflow can't be resumed.

Review the Change Order Workflow

You can use the change order workflow tab to review the workflow status, date when the status changed, and details on approvals.

The Approvers panel shows whether the approval is assigned to a role or a user. In case of approvals assigned to a role, the panel also shows whether the approval is required from one or all users.

Approve or Reject a Workflow

To approve or reject a change, click the Approve or Reject button on the Workflow page. You can also request more information, reassign, escalate, or suspend the change.

Note that these buttons are displayed only if the opened change order is waiting for approval. If a change order is eligible for approval, a task notification appears in the Worklist panel.

To view more details about the change order, open the task details from the Worklist panel.

When you request more information from a user, the user must submit the information using **Actions** > **Submit Information** (available on the change) so that the change can be approved.

> **Note:** If a message appears during the approval informing you that the action is invalid or the user doesn't have the privilege, review the change history. Identify if more information was requested from a user. The change can be approved once the user submits the information.

Terminate and Restart a Workflow

If an approval workflow for a change order is stuck, you can terminate and restart the workflow.

You can terminate and restart the workflow in an engineering change order, change order without revision control, and engineering change request.

> **Note:** Only the **Assigned to** user sees the terminate and restart actions in the **Actions** menu.

Here are some scenarios in which the approval can be stuck:

- Approver has resigned from the company.
- Approver is mistakenly added and doesn't want to approve the change.
- Approver is on leave and a vacation rule hasn't been set up.
- Something unanticipated prevents the workflow from being approved as planned.

To terminate the approval workflow, use the **Terminate Workflow** action from the **Actions** list. This action is only available for the change order assignee.

When you terminate the workflow:

- It stops and remains in the Interim Approval or Approval status.
- Previous approval notifications for which the approvers haven't responded are removed. Notifications are removed from: BPM Worklist, worklist information tile in the Product Development work area, and bell notification.

  > **Note:** Except for the Analyst (assignee), all other users need the BPMWorkflowScmAdmin role to cancel, terminate, and restart change orders. This is regardless of the permissions defined in the additional workflow controls table. So if you modify the assignee, you must assign the BPMWorkflowScmAdmin role to the new assignee.

You can modify the list of approvers and restart the workflow. Use the **Restart Workflow** action from the **Actions** list. When you use this action:

- The workflow restarts from the status it was terminated.
- New approval notifications are sent.

FAQs About Workflows

What's the difference between One and All in an Approval type status?

For an Approval type status, on the Header Approval row, you can select One or All for the Response Required From property.

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One: Only one of the assigned approvers must approve the change order for it to advance.

All: All assigned approvers must approve the change order for it to advance.

How can I learn of problems with the statuses in my change order's workflow?

Run an audit and obtain the audit report. In the change order, click Actions > Audit, and select a name on the menu. Then click the Audit Results side tab.

Why is the change order workflow status in the wrong place in the order sequence?

It might be due to an incorrect sequence number specified in the Manage Change Order Types task (available in the Product Management offering).

Why did the change order go back to the Open status when rejected from the Approval status?

The Automatic Demotion Status property on the Approval status was set to Open by the administrator.

Why can't I promote or reschedule a change order I created using an import map?

Change orders that are generated from item import maps are automatically approved.

However, the change order won't be promoted or rescheduled if the effective dates of some affected objects in the change line are less than 30 minutes apart. Ensure that there is a time difference of at least 30 minutes between the effective dates of the affected objects before promoting or rescheduling the change line.

11 Relationships

Relationships in Items and Documents

In an item or a document, you can add related objects for the item you are working on.

When you set a relationship from one business object to another (or manufacturer part or change order), the association is established in both objects; that is, both objects display the name of the other, related object as a live link. Click the link to open the related object in its own dynamic tab.

There is no differentiation or hierarchy to relationships.

Use the Add icon **+** or **Actions** > **Add**; the **Add Relationships** dialog appears. You will only see objects for which you have privileges. You can click the **Refine** button to bring the familiar fields for Advanced or Basic searches. The Search list provides available types of objects that can be searched; the default is Items.

Some details about each item returned on the search appear on mouse hover-over, including the item's Name, Revision, and Lifecycle Phase. Only the latest revision of any item is returned on the search.

If you select an associated object, the Delete icon **X** and **Actions** > **Delete** are enabled.

Relationships with Business Objects in Other Applications

The administrator may have set up object types from other compatible applications on your system. These external object types may be listed on the Relationships Search list. For instance, if there are Oracle Cloud Innovation Management applications configured on your system, object types such as Concepts, Requirements, and Ideas are available for your search.

Product Development items are specifically available for relationships with Innovation Management business objects. If a relationship is established between a requirements specification or requirement and an item, and the requirement is modified in any way, the relationship link to the requirement in the item is then tagged with an indicator with the label **Has changed**. (The indicator or icon displays this tool tip.)

A relationship may also be established to an object in another, external application. However, you may find your privileges to modify such an object are more constrained than objects from Product Development. See your administrator.

CAD for Cloud Integration

The CAD for Cloud integration enables functional users in the CAD development process to coordinate and relate designs in Agile PLM to items in Product Development. You can relate a design in Agile PLM to an item in Product Development with the Publish Workbench tool on the Affected Files tab of a design file change order. You can also remove the relationship. Once a design object is successfully related to a Product Development item, the relationship between the two objects is included on the Relationships tab of the design in Agile PLM. It also appears on the item's Relationships table in Product Development.

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Relationships in Change Orders

You can use the Relationships tab in change orders to track relationships created automatically or manually between change orders and other objects.

Here are a few examples:

Example 1: Let's say a change order is created from a quality action. Then a relationship is automatically created between the change order and quality action.

Example 2: Let's say a change order is affected by a quality action. Then you can manually create a relationship between the change order and quality action.

> **Note:**
> - From update 23C onward, you can add, update, or delete relationships in canceled change orders. This means you can also delete a canceled change order after deleting its relationships.
>
> - You can make changes only on the Relationships tab, not on any other tab.
>
> - It's not recommended to add new relationships to canceled change orders.

Relationship Type

You can select a Relationship Type (on the Relationships tab) after the relationship is created. Here are the relationship types:

Fulfills, Fulfilled by, Impacts, Impacted by, Verifies, Verified by, Validates, Validated by, Tracks, and Tracked by, and Split by import.

Note that **Split by import** appears selected if the change is created through import and is split during import. A relationship is automatically created between change orders split during import.

Add Rules to Validate Relationships

Let's say a quality issue is raised against a defective part, a quality analyst raises a quality action. The defective part contains a defective structure. So a change order is created from the quality action and a relationship between the change order and quality action is automatically created.

When the defective part is fixed and released through the change order, the quality action is resolved. This change order's release indicates that the quality action is validated.

For additional validations, you can create rules.

To add a new rule, click the plus (+) icon on a change order's Relationships tab. The rule specifies the status that the change order must be in (or reach) for the quality action to move to an appropriate state. You can change or delete the rule.

The default rules are: release of the pertinent change order is the only means to validate the related quality actions; validation of the pertinent quality actions is the only means to close the quality issue.

12 Attachments

Manage Attachments in Items and Change Orders

The Attachments side tab on an item displays a list of documents or graphics or other files that have been attached to the item. The application tracks changes to attachment file attributes such as name and description.

Attachments on items are subject to change control. You must create a change order to authorize and approve modifications to attachments. Also, you can't modify an attachment on a released item without a new change order.

You can download item attachments for either first or all structure levels by using the **Download** action on an item page.

Here's what you need to know before you download attachments:

- You can download the following attachment types: text, URL, and file. The application manages special characters and duplicate file names in the attachment title.

- The content of a text attachment is stored in a text file, and the file name is composed of the text attachment title with the suffix .txt.

- If the title information is unavailable or the title contains special characters, then the file name is composed as TEXT.txt.

- To distinguish multiple instances of the same file name, the application adds a number (#) to the file name. For example, TEXT.txt, TEXT(1).txt, TEXT(2).txt.

- A similar behavior is available for attachments of type URL. However, the standard file name is URL.txt.

- To distinguish multiple instances of the file name of type DOC, the application adds a number (#). For example, FILE.doc, FILE(1).doc, FILE(2).doc.

  > **Note:** If the download for an item attachment fails, you can use the application severity and Enterprise Scheduler Service logs to identify attachments with missing file extensions, the file path, and the associated components.

Attachment Redlines

The modifications to item attachments are called redlines. Redline information for an item is captured in its Attachments page. The Redline Summary panel displays the attachment modifications. Attachment modifications are counted in Change Operations.

Change Order Attachments

An attachment on a change order is a document that further explains something about the change order.

You can select **Download Attachments** from the Actions menu of a change and choose from the following options to specify which attachments you want to include.

- From **Affected Objects** you can download:
  - Redlined: Includes only the redlined (added, created, or modified) attachments of affected objects
  - All: Includes all attachments of affected objects

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- ○ None: Excludes attachments of affected objects

- From **AML** you can download
  - ○ Redlined (default option): Includes only redlined (added, created, or modified) manufacturer part attachments
  - ○ All: Includes all the manufacturer part attachments
  - ○ None: Excludes manufacturer part attachments

  If you select **None** for both affected objects and AML, the **Submit** button is disabled.

The **Download Attachments** action also appears in the change history.

Actions on Attachments in a Change Order

Once the item holds an attachment, the Attachment page actions include:

- Check In
- Check Out
- Cancel Checkout

To associate files with items, use the Add icon **+** or **Actions** > **Add**.

If you select a listed attachment, the Delete icon **X** and **Actions** > **Delete** are enabled.

If you find the attachments Add icon **+** or **Actions** > **Add** is disabled, possible reasons are: the item has another, later revision; or, the item is currently on a change order.

Related Topics
- View Affected Objects and Change Operations

Considerations for Managing Attachments in Items and Change Orders

Attachments are handled differently in Product Information Management and Product Development work areas.

Here's what you should keep in mind if you're creating and managing attachments in both Product Information Management and Product Development.

Product Information Management	Product Development
Supports item-level and item revision-level attachments.	Supports only item revision-level attachments.
Item and item revision-level attachments can be edited through the item, but not through a commercial change order.	After an item is released, item revision attachments can only be edited by redlining through a change order.

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Product Information Management	Product Development
Item revision attachments don't flow to the next revision.	Item revision attachments flow automatically to the next revision, unless deleted.
Item images are stored and shared as item-level attachments.	Item images are stored and shared as item-level attachments.

Note: When you add an attachment to an item in Product Development, it will be visible on the item in Product Information Management only if the item is in a higher lifecycle status than Design. Note that the attachment appears in Product Information Management as an item revision-level attachment, not as an item-level attachment.

Best Practices

Here are some best practices for managing attachments:

- Use item-level attachments to associate unstructured content and additional details with an item. These attachments aren't revision-specific; they apply to all revisions of an item.

- Given that these item-level attachments aren't change controlled, always use the actions available on the Attachments panel from the Product Information Management work area to manage changes to these attachments.

- Always add attachments to a change order using the **+Add** button on its Attachments tab to ensure proper association and auditing. Avoid adding attachments directly from notifications.

FAQs About Attachments

How do I attach files to an item or document?

On an item or a document, click the Attachments side tab and then click the Add Attachment icon.

Why can't I attach files to an item or document?

You need to attach some files to an item or document, but the Add icons on the Attachments tab are grayed out. The item or document either has another Revision or is on a Change Order currently.

How can I view redlined attachments for a change order?

On the Edit Change Order page, select **Download Attachments** from the **Actions** menu of a change and choose from the given options to specify which attachments you want to include.

Related Topics
- Manage Attachments in Items and Change Orders

Will attachments I add in Product Development show up in Product Information Management?

The attachment you add for an item Product Development is visible in Product Information Management only if the Product Development item is in a lifecycle phase higher than design.

Note that the attachment appears as an item revision attachment in Product Information Management.

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13 Roll Up Costs

Overview of Cost Rollups in Product Development

As part of product design and development, design engineers need estimated costs of a product or its components and assemblies. During new product development, users build products by using new items and by reusing existing items.

For existing items, costs may have been captured in a costing solution, such as Oracle Cloud Costing. This company can use costs captured in the costing solution to estimate the costs of the product during product design and development. For new items, and for existing items that have no set cost, design engineers must provide a high-level estimate of costs directly to each item.

> **Note:** Documents aren't supported by cost rollups.

Display Costs in Product Development

The following capabilities are supported for cost rollups. Existing or "historical" items in Cloud Costing may provide costs to Product Development, but the cost rollup functions don't depend on being connected to a deployment of Costing.

Costs in the Costing solution are based on an inventory organization. To support this, Product Development can determine what inventory organization to use, to retrieve costs. This option can be disabled if the company doesn't deploy Costing. By default, the inventory cost organization is the same as the default Product Development organization, which is the Master Organization.

The **Material Cost**, **Overhead** Cost, and **Total Cost** fields are on the General Information page of an item. On a structure - a subassembly or top-level assembly - choose **Refresh Cost** from the list; this retrieves from Costing the latest costs of all child items and performs the rollup.

Display Costs for a Leaf Item

The Material Cost of an existing item may be retrieved from Costing.

- If the item had a cost in Costing, the Material Cost of the item in Product Development is Read Only.
- If an item had no cost in Costing, or it's created in Product Development, its Material Cost may be entered, and it remains an editable field.
- For a leaf item, Overhead Cost and Total Cost are always Read Only fields.

  > **Note:** The leaf item appears at the end of the entire structure.

- Let an item be an assembly, which has a user-entered Overhead Cost; should it become a leaf item, its Overhead Cost is no longer displayed.

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Display Costs for a Structure

Determining the cost of a structure, or assembly, depends on the completeness of the data on the child items of the top-level item.

- Material Cost of an assembly is rolled up from the child items. Material Cost is a Read-Only field for an assembly in PD.

- Overhead Cost for a subassembly or top-level assembly can be entered manually, and it remains an editable field.

- Let there be a leaf item, which has a user-entered Material Cost; should it become an assembly (top-level or otherwise), its Material Cost is no longer displayed.

- An assembly's costs may be incomplete because not all of its child items have been assigned costs. To indicate that the assembly cost is incomplete, a warning icon is displayed next to the Total Cost attribute.

Business and Validation Rules

This topic lists various rules that govern cost rollups in Product Development.

Business Rules of Cost Rollups

This table lists new item request notifications.

Item Type	Item Status	Item Revision	Material Cost	Overhead Cost	Total Cost
Leaf	Not Released (new item in preliminary state)	Initial (Rev A)	Editable (unless cost came from Costing)	Not editable	Not editable
Leaf	Released	Latest	Editable (unless cost came from Costing)	Not editable	Not editable
Leaf	Released	Not latest	Not editable	Not editable	Not editable
Leaf	Pending change order	Any pending rev	Editable (unless cost came from Costing)	Not editable	Not editable
Assembly	Not Released (new item in preliminary state)	Initial (Rev A)	Not editable	Editable	Not editable
Assembly	Released	Latest	Not editable	Editable	Not editable
Assembly	Released	Not latest	Not editable	Not Editable	Not editable
Assembly	Pending change order	Any pending rev	Not editable	Editable	Not editable

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Validation Rules of Costs

Rules that apply to the expression of costs.

- If the user can enter the cost, it must be a positive value (that is, $0 or greater).

- Users may enter any number of digits after the decimal; however, the application only displays four digits after the decimal.

FAQs About Roll Up Costs

Can an item's material cost be edited, even if it is retrieved from costing?

The material cost cannot be overwritten by the user.

However, if the original cost record has been deleted in Costing, that item no longer has a cost, the material cost of the leaf item can be edited in Product Development. The original material cost will be removed in the Product Development item.

Can a cost be specific to a revision?

Yes, if you set the cost of an item in Revision A at $10, and create a Revision B and set the cost to $12, the item's rev A displays as $10 and rev B displays as $12.

Does costing capture revision specific costs of items?

No.

Costing provides costs based on effectivity dates. When Product Development retrieves costs from Costing for a leaf item, it will use that cost for all revisions of the item, regardless of the item's effectivity date. If a leaf item has a cost of $15 from Costing, the amount will carry to any future revisions of the same item - as long as it's still a leaf item. If the cost of the item changes in Costing to $20, the next rollup in Product Development displays the cost of that leaf item as $20, which would carry to future revisions of the item.

What happens if an item with a material cost becomes a structure?

If this occurred in the same revision, the original material cost is removed and becomes read-only for the structure or assembly.

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Note that it could still be stored in the schema so that it can be used in a future release. If this occurred in a newer revision, the material cost remains visible for the previous revision of the item, when it was a leaf item. In the new revision, the material cost is rolled up from the child items.

Can costs be redlined through a change order?

No, costs can't be redlined through a change order.

What formula is used to calculate total cost?

Material Cost of an assembly is always the rollup of the total costs of its children, including the quantity.

For example, if the total cost of a child item is $10, and there are 5 of these in the structure or assembly, the material cost of that assembly is $50.

- Total Cost of a leaf item = Material + Overhead (although Overhead will always be 0)
- Total Cost of an assembly = Rolled up Total Costs from the children + Overhead

What happens if the Inventory Cost Organization of an item is changed to another organization?

When you change the organization of an item, the next time you roll up that item, the cost from the new organization is used.

If the item, with its original organization, had a cost from Costing, but the new organization doesn't have it, the cost for the item in Product Development is deleted. This lets you to manually provide a new cost.

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14 Manage Objects from Supplier Portal

View Items on Supplier Portal

As a supplier portal user, you can view the following side tabs on items:

- **General Information** - the default or cover page of an item.

  You can view an item's revision number and the corresponding change order from the **Revision** list. Note that canceled item revisions don't appear in the list.

- **Attachments** - text or graphic files, or URL, with more information about the item.

- **Structure** - the Bill of Materials for assemblies, products, and other collections of items.

- **AML** - approved manufacturers list; represents a list of manufacturers, suppliers, or vendors approved for the purpose of procuring manufactured items.

- **Changes** - lists changes that the item is on.

- **Quality** - problem reports, or corrective actions to which this item is added.

- **Where Used** - displays those item-structures to which the item is added.

- **History** – shows data changes made to audit-enabled item attributes.

Content Presence Indicators

The following content presence indicators help you quickly access item and component details:

- A blue icon indicating the presence of content appears on the item's side tabs. Additionally, when you hover on the tab that has content, the tooltip displays Has Content.

  > **Note:** The General Information tab icon isn't displayed in blue since it always has content.

- Blue dot icons on structure component rows indicate the presence of pending changes and quality-related data. You can click the blue dot to navigate to the corresponding details in the side tab.

- For quality objects, the blue dot appears if there is at least one quality issue, quality action, problem report, or corrective action in any workflow status against any item revision. Note that the object can be pending or released.

  When you click the blue dot on quality objects, only problem reports and corrective actions appear in the Quality side tab. You can only see and navigate to those objects for which you have access.

Create Problem Reports and Corrective Actions

You can create problem reports and corrective actions from the:

- **Create** (+) menu on the Overview page in the Quality management work area

- **Actions** menu of an item in the Product Development work area

- **Actions** menu of an item in the Product Information Management work area

You can see that they appear on the Quality tab of items in the Product Development, Product Information Management, and Quality Management work areas. Remember that the **Create Problem Report** and **Create Corrective Action** options appear on the **Actions** menu only after you create and save an item.

For suppliers the page reloads with the newly created object.

Note: The newly created problem reports and corrective actions automatically display organization data from the item.

The workflow of a problem report or corrective action progresses as specified by the statuses defined by the administrator. For more details, see Set Up Problem Reports and Corrective Actions.

Create 8D Corrective Action.

You can choose to create a corrective action from the following two options in the **Type** drop-down list:

- Corrective Action – action to mitigate a quality issue and prevent its further occurrence.

- 8D Corrective Actions – action that uses the 8D methodology. An investigative dive to find the cause of a problem, a solution to fix it and a method to prevent recurrence.

The 8D methodology involves a systematic investigation into the root cause of a problem to prevent recurrence. It uses a structured, preconfigured template based on 8 disciplines to define the problem, identify the root cause, and run the corrective and preventative action (CAPA) to prevent recurrence.

Here's a brief description of the eight disciplines:

1. Plan and form team: Create a plan to minimize or mitigate the problem and establish a team of skillful and knowledgeable people
2. Define Problem: define and describe the problem
3. Interim Containment: define and implement containment actions
4. Determine Root Cause: identify the root cause
5. Verify Correction: verify and choose the most effective corrective action
6. Implement Corrective Actions: implement the corrective actions
7. Prevent Recurrence: implement actions to prevent a recurrence
8. Recognize Team Effort: acknowledge and congratulate the collective effort of the team.

Note: Although the change type 8D Corrective Actions is predefined, the attribute visibility setting is read-only. The change type inherits the configuration from its parent change type, Corrective Action.

Create a Corrective Action from a Problem Report

You can also create a corrective action from the Actions menu of a problem report. The corrective action opens in a dynamic tab for editing. For suppliers the page reloads with the newly created object.

While creating a corrective action from a problem report, you can select to copy over the descriptive flexfields, attachments, relationships, and tasks for the problem report. You can also copy over the affected objects including descriptive flexfields to the new corrective action. The corrective action is automatically linked to the problem report in the Relationships tab.

Related Topics

- Overview of Change Type Setup
- Configure Change Orders
- Understand Change Types

View Changes on Supplier Portal

As a supplier portal user, you can view the changes for which you're granted access.

Here are some of the side tabs available on change orders:

- **General Information** - the default or cover page of a change order.

  The General Information tab displays the cover page details including the trading partner reference attributes like Customer, Supplier, Manufacturer, and Source. The trading partner reference attributes exposed to the business user are displayed in the supplier portal.

- **Affected Objects** - items and structures (including components) that are the subject of the proposed change or modification. Items can contain problem report, or corrective action.

  To view the structure, open the affected object and click the Structure tab.

- **Attachments** - text or graphic files, or URL, with more information about the change order. As a supplier portal user, you can only view attachments for which you're assigned permissions.

Content Presence Indicators on Affected Object Structure

Content presence indicators on the structure tab of the affected object provide quick access to changes and quality-related data.

Here's what you need to know:

- Blue dot icons on structure component rows indicate the presence of pending changes and quality-related data. You can click the blue dot to navigate to the corresponding details in the side tab.

- For quality objects, the blue dot appears if there is at least one problem report, or corrective action in any workflow status against any item revision. Note that the object can be pending or released.

  When you click the blue dot on quality objects, only problem reports and corrective actions appear in the Quality side tab. You can only see and navigate to those objects for which you have access.

Submit Change Requests from Supplier Portal

If you're a supplier portal user, you can submit change requests to suggest changes to a released item.

You can also initiate the change request workflow by changing the status from Draft to Open. Once the request is open, the change analyst receives a notification.

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Note:

- The change analyst (or change request assignee) is configured by the administrator as part of the change type setup.

- If you're unable to manage changes from the supplier portal, ensure that you have relevant privileges. For more information, see the related topics.

Here's how you submit a change request from Supplier Portal:

1. In **Products**, click **Manage Item Change Requests**.
2. On the Manage Item Change Requests page, click **Actions** > **Create Change Request**.
3. Enter details of the change request, and click **Save and Edit**.
4. To change the status of the request from Draft to Open, click **Change Status** > **Open**.
5. Click **Save and Close**.

   When you receive a notification to approve the status change, enter comments to help the change analyst review the request.

Related Topics

- Overview of Change Orders and Change Requests
- Configure Supplier Portal Users
- Troubleshoot Access to Objects on Supplier Portal

Publish Change Orders from Supplier Portal

As a supplier portal user, you can publish engineering change orders into an XML report. You can then use the report to integrate change order data with another application, or for another purpose.

After publishing is complete, the process number including hyperlinks to reports appears in the first 72 hours of report generation. Later on, only the process number appears.

Here's how you publish a change order from Supplier Portal:

1. In **Products**, click **Manage Item Change Orders**.
2. On the Manage Item Change Orders page, open an engineering change order that you want to publish. You can select more than one change order.
3. Click **Actions** > **Publish**. Note that you can only publish engineering change orders.
4. In the Change Publication Criteria dialog box, select the entities you want to publish and click **Publish**.

   A process ID is generated for each change order. You can also monitor the publication status from the Manage Item Change Orders page.

   Here are some additional details about entities:

   - The **Include attachment files** check box is enabled only if you select the change attachment entity. Select this check box to include the attachment files (digital assets) along with the attachment metadata when you publish.
   - By default, the **Change general information** entity is always selected for publishing and you can't change this setting.

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15 Analyze Objects with OTBI

Why Use OTBI Reports

Use OTBI (Oracle Transactional Business Intelligence) reports to view embedded real-time analytics, reports, and dashboards based on real-time transactional data in Oracle Fusion applications.

To access reports and analytics from the Product Development work area, click the Reports and Analytics side tab.

Related Topics
- Overview of Transactional Business Intelligence

Use Predefined OTBI Dashboards for Changes and Items

With additional dashboards in OTBI (Oracle Transactional Business Intelligence), you can view analyses for PLM objects.

Navigate to **Oracle Transactional Business Intelligence > Dashboards > Supply Chain Management > Change Orders Dashboard or PLM Details Dashboard**.

Use the **Change Orders** dashboard to analyze the count, cycle time, and aging metrics of change orders, change requests, problem reports and corrective actions and drill-down to view detailed reports. By default, the dashboard will display data from the current year and the previous year. You can view the status, and the remaining or pending approvers to approve the change orders using change order approval reports. Use the **PLM Details** dashboard to search for items using various attribute filters. Use the link in the dialog box with available reports, set up by the administrator, to view the OTBI report results page.

Publish Items for Analysis in OTBI

To make data available for reports, you must first publish the data for analysis in OTBI (Oracle Transactional Business Intelligence). You can publish the item structure and where-used data.

Here's how:

- On the item page, click **Actions** > **View Reports > Publish**.

  Or

- On the item search results page, select the items you want to publish. Then click **Actions** > **Publish for Analysis**.

The analysis on items and structures provides critical decision-making information.

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Note that you must have either of these roles:

- Product Manager (ORA_EGP_PRODUCT_MANAGER_JOB)

- Product Design Engineer (ORA_ACD_PRODUCT_DESIGN_ENGINEER_JOB).

Note: To see the descriptive flexfields in OTBI, you must run the scheduled process - Import Oracle Fusion Data Extensions for Transactional Business Intelligence and to populate data in Structures and Components and Where Used subject areas, you must run the scheduled process - Run Scheduled Process for Populating Subject Areas.

Related Topics
- Overview of Creation and Administration of SCM Analytics and Reports
- SCM Subject Aeas in Oracle Transactional Business Intelligence
- How You Create and Edit Reports

FAQs About OTBI

How can I add the publish date and time in a report?

Navigate to **Tools** > **Reports and Analytics** > **Browse Catalog**. Open a report and expand **Views** in the side panel.

- In the Compound Layout page, select the Title attribute and click **Edit**.

- Select **Display Date and Time** from the **Started Time** drop-down list and click **Done**.

The report will display the last publish date and time.

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16 New Item Requests

Overview of New Item Requests

In Product Development, items are usually created with create dialog or various add item features on items, structures, and change orders.

There's a more formal process of item creation called the New Item Request process. The administrator can establish a Product Development item class that requires the new item request process to be followed.

In the new item request process, a new item is validated and approved before it's made available to enrichment processes and structure-building in Product Development. The validation steps take place in the Product Information Management work area.

A new item request may be appropriate for a product that will go through the complete manufacturing or commercialization phases. A less formal process may be appropriate for a more preliminary, design phase of product innovation.

Your enterprise may use either the formal new item request process, or the informal processes for the development of new items and structures.

Related Topics
- Create New Item Requests
- When can items be added to a new item request?
- Set Up New Item Requests

New Item Request Process

The formal process of item or structure creation requires the new object to go through a workflow. The item creation may be initiated in Product Development, but it passes over to Product Information Management for the analysis and approval process.

When a development item is created in Product Development, and it's going to be oriented through new item request, a product manager or item analyst is notified of the item. When the new item request process is triggered, the item is routed to assignees, who are informed what needs to be considered based on the item class setup.

The stages of the workflow are:

- **Open** - submitted
- **Definition** - when the assignees respond
- **Scheduled**
- **Completed**

The item is routed for approval, only after it has passed through the Completed status.

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For an item that's undergoing the new item request process, the **Approval Status** attribute - on the **General Information** tab - displays the new item request number along with its approval status. This lets a Product Development user identify those items that are engaged in the new item request process.