

Configuring Change Orders to Release Process Plans

In this example, the business uses Change Orders to **release** MBOMs and their associated work instructions, represented as Process Plan items in Aras Manufacturing Process Planning (MPP).

Steps to configure are as follows:

1. **Log in with Administrator privileges**
 - o Sign in as a member of the **Administrators** group.
2. **Update Poly Sources for Affected Items**
 - o Open the **ucm_AffectedItem** Item Type for editing.
 - o Go to the **Poly Sources** tab and add the **mpp_ProcessPlan** Item Type.
3. **Log in with Change Administrator privileges**
 - o Sign in as a member of the **Change Administrators** group.
4. **Update the Change Actions**
 - o Open the **Release** Change Action.
 - o On the **Applicable To** tab, add the **mpp_ProcessPlan** Item Type.
 - o Repeat for the **Revise** Change Action and any other relevant Change Actions.
5. **Edit the Change Process Definition to add validation automations**
 - o **Purpose:** Ensure a validation error appears if affected items of type **Process Plan** with the **Release** action are not in the **Preliminary** state.
 - o While logged in as **Change Administrators**, open the **Change Process Definition** for the **Change Order** Item Type.
 - o On the **Automation Rules** tab, add the existing automation named *Selected action requires item to be in unreleased state*, and fill in the fields as required.

Field		
Enabled	✓ Checked	✓ Checked
Event	Add	Update
Automate For / (Applicable To)	Relationship	Relationship
From State / To State	[empty]	[empty]
Relationship	ucm_ChangeOrder_AffectedItem	ucm_ChangeOrder_AffectedItem
Related Item Type	mpp_ProcessPlan	mpp_ProcessPlan
Related Event	Release	Release

- o Repeat the above steps to trigger a validation error if affected items of type Process Plans with the Revise action are not in Released state. Add the *Selected action requires item to be in released state* automation and fill the fields as follows:



Field		
Enabled	✓ Checked	✓ Checked
Event	Add	Update
Automate For / (Applicable To)	Relationship	Relationship
From State / To State	[empty]	[empty]
Relationship	ucm_ChangeOrder_AffectedItem	ucm_ChangeOrder_AffectedItem
Related Item Type	mpp_ProcessPlan	mpp_ProcessPlan
Related Event	Revise	Revise

6. Edit the Change Process Definition to add action automations

- o Purpose: Change Orders with affected Process Plans should automatically promote the Process Plans throughout the Change Order workflow, including (but not limited to):
 - Promote to **In Review** when the workflow reaches the **Audit** activity.
 - Promote from **In Review** back to **Preliminary** if the workflow is returned for rework.
 - Promote to **Released** when the Change Order workflow is completed.

Purpose	Automation	Method
New revision of affected item.	Create a new revision	<u>ucm_CreateNewRevision</u>
Promote affected item to In Review.	Promote new item revision to In Review for Audit	<u>ucm_PromoteNewItemRevForAudit</u>
Promote affected item from In Review back to Preliminary.	Return new item revision to Preliminary state	<u>ucm_PromoteNewItemRevForRework</u>
Promote affected item to Released.	Release item	<u>ucm_ReleaseItem</u>

- o The **same steps** can apply to other action automations as necessary, e.g. obsoleting items.

Important

The methods for Release, Revise, and Obsolete actions do not require modification, as they are implemented generically for any Item Type. If different business logic is needed, a new method can be created.

Important

Process Plans reuse existing **Change Actions** and lifecycle state names. If your setup uses different actions, states, or logic, update the method or create a new automation.

7. Perform additional checks



- Ensure the Item Type configuration supports the proper behavior for change-controlled items. For example, Process Plans should be versioned through Change Orders, and once released, they should no longer be editable.
 - **Confirm** the **mpp_ProcessPlan** Item Type is versionable.
 - **Verify** the **Released** state prevents edits (using state permissions or the *not lockable* setting). This ensures users can't modify released Process Plans (operations, steps, tools, produced/consumed parts, etc.).
 - **Review** any other relevant Item Type configurations.

- In the lifecycle map, check which role promotes lifecycle transitions (for Process Plans, this is usually **Manufacturing Engineering**) and confirm **Change Executor** is included in that role identity.

