

Configuring Change Management

The CMII, Simple Change Management, and Express Change Management processes are available in the Product Engineering application. Each process has its own Change Management ItemTypes. They are discussed in detail in the *Aras Product Engineering 14 - User Guide*.

As an Administrator, you can use the **Choose CM Options** dialog to allow one or more of these change processes (ItemTypes) to run in parallel as well as to set the default Change Management ItemType for the affected Items: Parts, Documents, and CAD Documents.

Choose CM Options ×

TOC Access

CMII

PR ☐

ECR ☐

ECN ☒

Simple

ECO ☐

MCO ☐

Express

ECO ☒

DCO ☒

Default Changes

Part:

ECR ▾

Document:

ECR ▾

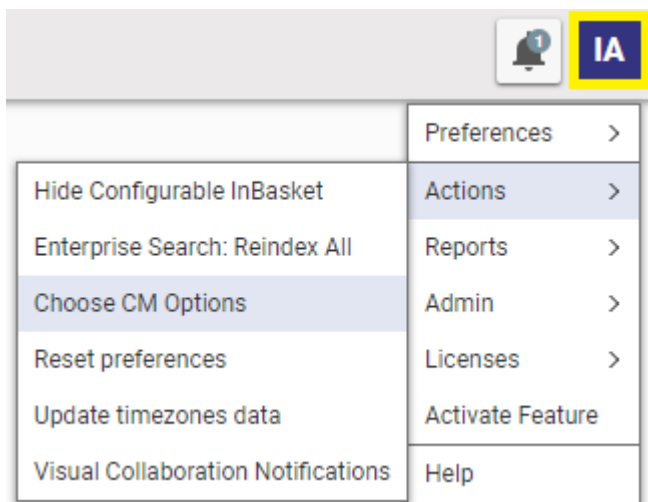
CAD Document:

ECR ▾

Ok

Cancel

To access the Choose CM Options dialog, click the User Menu icon null and select Actions Choose CM Options.



Configuring Change Management TOC Access

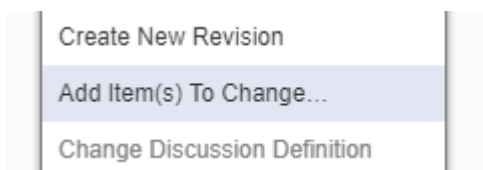
The **Choose CM Options** dialog provides a convenient tool to specify the visibility of Change Items in the TOC. The **TOC Access** group of check boxes displays Change ItemTypes:

- By selecting **a checkbox**, the corresponding ItemType will be visible on the TOC for the **All Employees** Identity.
- By clearing **a checkbox**, the corresponding ItemType will be hidden on the TOC for all Identities except for **Aras PLM**.

If a more elaborate TOC Access is needed, you can use the standard TOC configuration.

Setting up a Default Change Management Item

One of the ways to initiate a change for an affected Item is to access the **Choose Change Item** dialog: right-click the **Item** in the *search grid* and then click **Add Item(s) To Change** in the dropdown menu.



By default, the **Choose Change Item** dialog is opened with **ECR** for all affected ItemTypes.

Choose Change Item

Change Type:

ECR

Item:

Create new

OK

Cancel

The users use the **Change Type** drop-down list to select another Change Item.

Choose Change Item

Change Type:

ECR

PR

ECN

ECR

Simple ECO

Simple MCO

Express ECO

Item:

OK

As an Administrator, you can configure the **Choose Change Item** dialog to be opened with a default Change ItemType for a given affected ItemType. Use drop-down lists in the **Default Changes** group of the **Choose CM Options** dialog.

Choose CM Options

TOC Access

CMII

PR

☒

ECR

☒

ECN

☐

Simple

ECO

☒

MCO

☐

Default Changes

Part:

PR

Document:

ECR

CAD Document:

ECR

PR

ECN

ECR

Simple ECO

Simple MCO

Express DCO



Configuring the **Default Changes** group does not affect TOC Access.

