Configuring Identities

Setting up Identities in the Aras Product Engineering application is similar to building a company organization chart. The configuration process is as follows:

- Create a Group Identity for each top-level structural unit (department). For example, a company may have the following departments: Engineering, Sales, Finance, and Marketing.
- For each top-level Identity, create a hierarchy of Group Identities reflecting the structure. For example, Engineering may have Development, Support, and QA. Support may further consist of Customer Support, Documentation, and Training.
- Create Teams for Express Change Management.
- Create individual User Identities.
- Assign each of the User Identities to the appropriate Group Identities.
- Assign Identities involved in change management to Change Management Group Identities and Teams.
- Assign Identities responsible for managing Effectivity on Bill of Materials (BOM) to the Effectivity Management Identity.

Understanding Change Management Roles

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

Each Change Management ItemType is handled by specific Roles in its Workflow. These Roles are represented as Change Management (CM) Identities, Change Management (CM) Teams, and System Identities:

- The CM Identities are used in the CMII and Simple Change Management Workflows.
- The CM Teams, as well as the CM Identities, are used in the Express Change Management Workflows.
- The System Identities are Roles that the system defines, such as an Item Creator or Owner.

As an Administrator, you must assign User and Group Identities to the CM Identities and Teams used in your workflows.

> **Important**
>
> **Each required Role must be populated with the necessary Identities before a Change Management Workflow Process starts.**

Change Management Identities

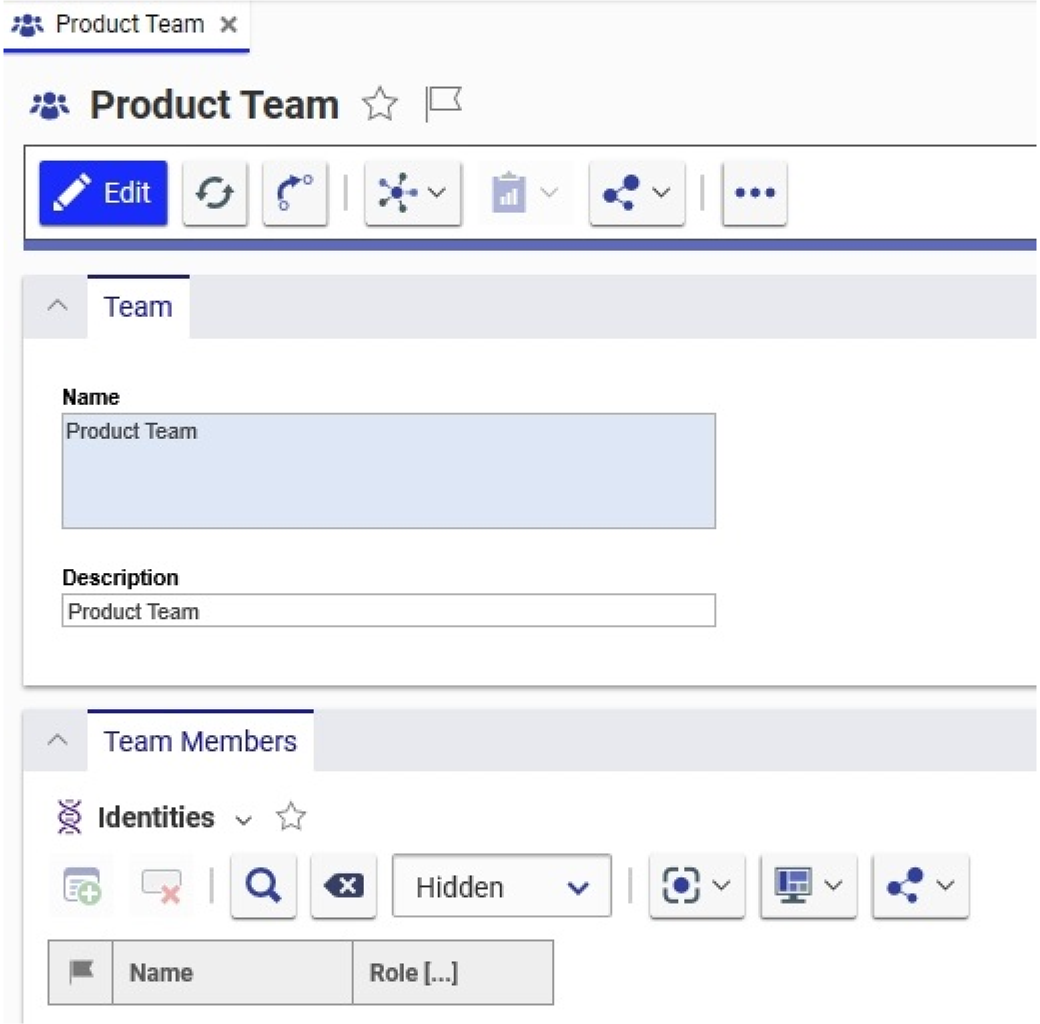
Aras Product Engineering has built-in Group Identities that hold specific permissions: control Workflows of specific Items, Item creation, Item access, etc. These Identities and their Roles are based on the CMII standards. These Identities are:

- **CM group—the Configuration Management group**—consists of CSI, CSII, and CSIII:
  - **CSI**—**Change Specialist I**—the person who drives the change process in a company. The CSI determines who is technically responsible for problem verification, which changes have higher priority than others, whether an ECR (Engineering Change Request) can be approved through a fast track or if it needs review board involvement. The CSI is also responsible for determining if the required change has a wide impact and can bring others into the review process.
  - **CSII**—**Change Specialist II**—the person who completes the change process in a company. The CSII decides when approved changes get implemented, when actual items get changed, and if any requests can be combined into a single change notice.
  - **CSIII**—**Change Specialist III**—the person who implements the change in the production process of an affected item. The CSIII decides when the change goes into production and how it affects the existing production flow. By default, CSIII is active in a Change Management Workflow during the last phases of an ECN (Engineering Change Notice).
- **CRB—the Change Review Board**—the people responsible for several steps in the ECR process. When an ECR has wide or complex implications, the CRB is engaged to review the change and provide input into the process.
- **Component Engineering**—the people responsible for managing the Parts that a company uses as well as the sourcing aspects of these Parts: Manufacturers, Vendors, and the Lifecycles associated with these Items.
- **All Employees**—the employees of the company.
- **All Customers**—the customers of the company.

- **All Suppliers**—the suppliers that a company uses.

Change Management Teams

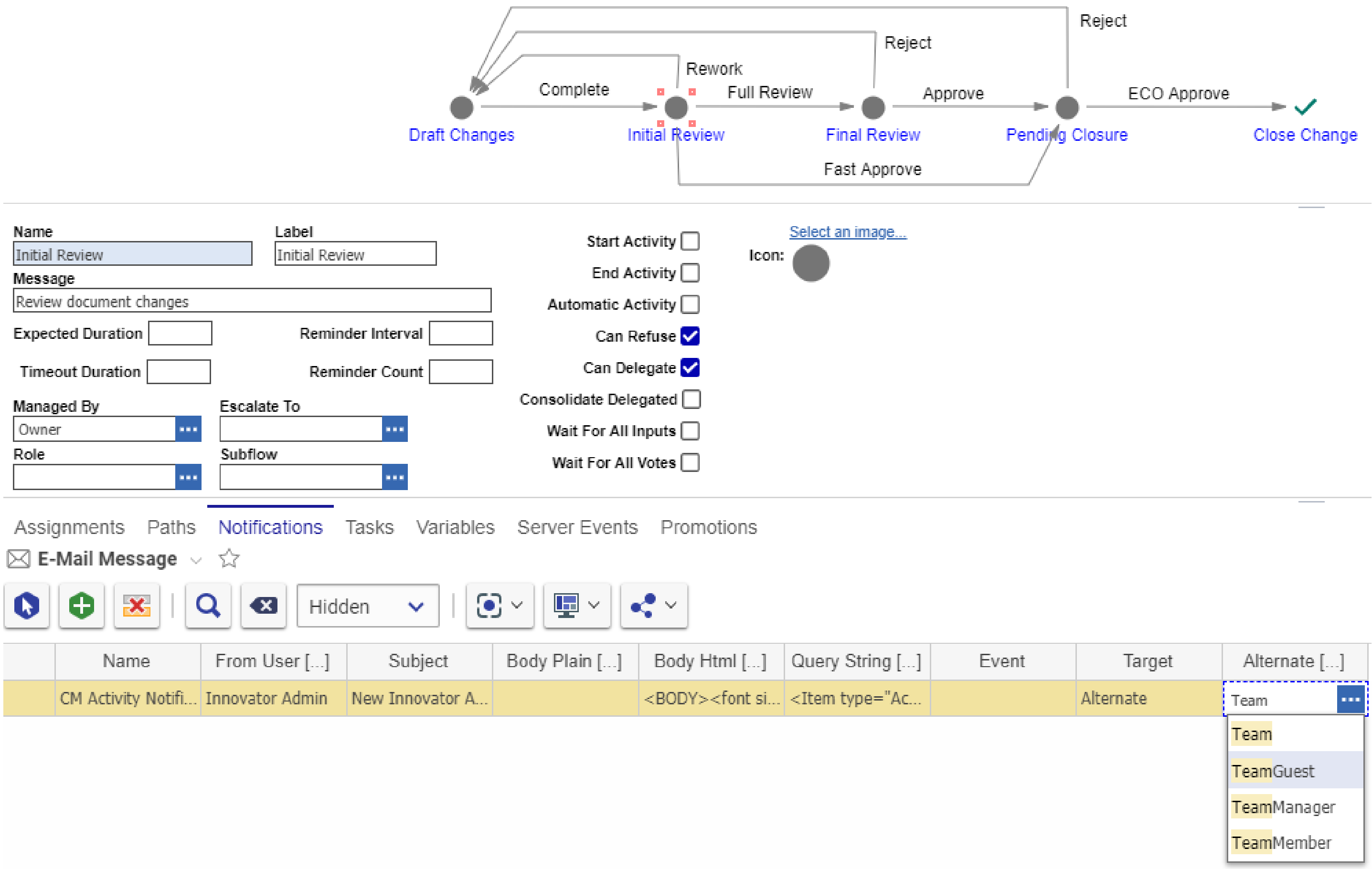
To access or create a Team, click the Navigation icon null to access the Table of Contents (TOC) and click Administration Teams. You can search for existing teams or create new ones. The following figure shows the Product Team form.



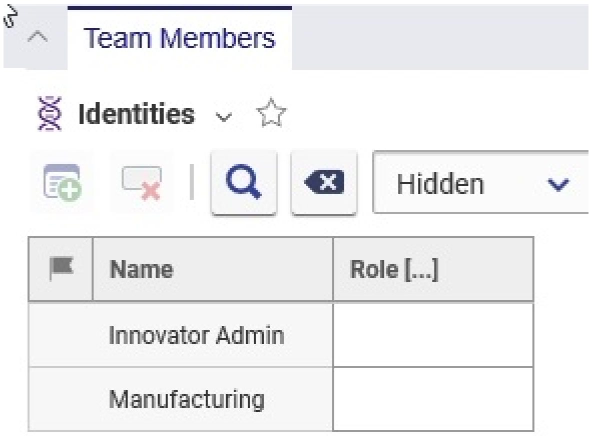
The **Product Team** is used by default in the Express ECO and Express DCO Change Items.

As an Administrator, you must populate the Teams with all the Team Roles necessary for the Express Change Items used at your company:

- **Team Manager**—plans and reviews the changes.
- **Team Member**—reviews and implements the changes. Some Workflows require several Team Members, e.g., one assigns a Review Task to another.
- **Team Guest**—is used for notifying a specific Identity not involved in the Workflow.
- **Team**—is used when it is necessary to notify the whole Team.

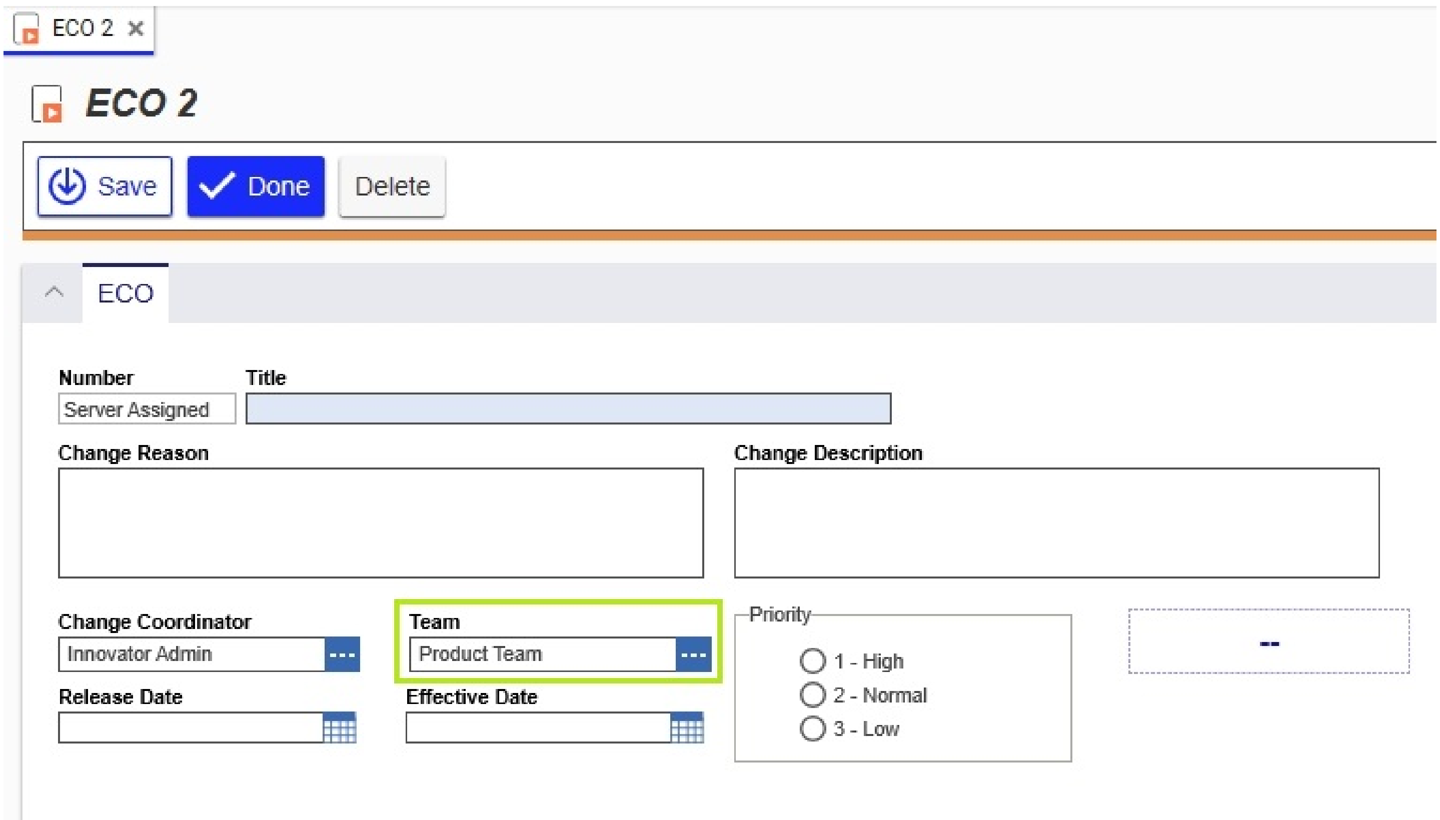


Within a Team, one Identity can have several Roles and several Identities can have the same Role.

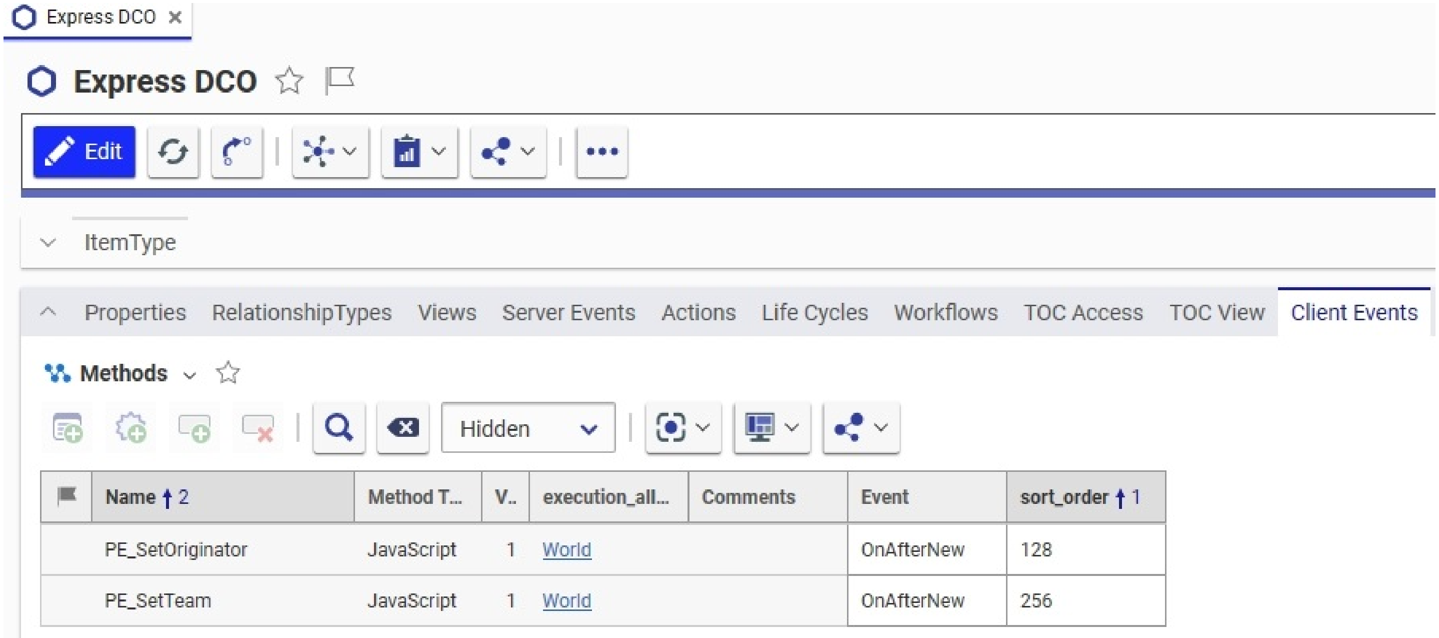


Changing the Default Team on Express Change Items

When you create an Express Change Item, the **Team** property is prepopulated with **Product Team** by default.



The **Client Events** accordion tab of each ***Express Change ItemType*** Item view includes the **PE_SetTeam** Method, which defines the default Team. The **OnAfterNew** Event invokes the method.


Express DCO
Express DCO
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OnAfterNew
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PE_SetTeam
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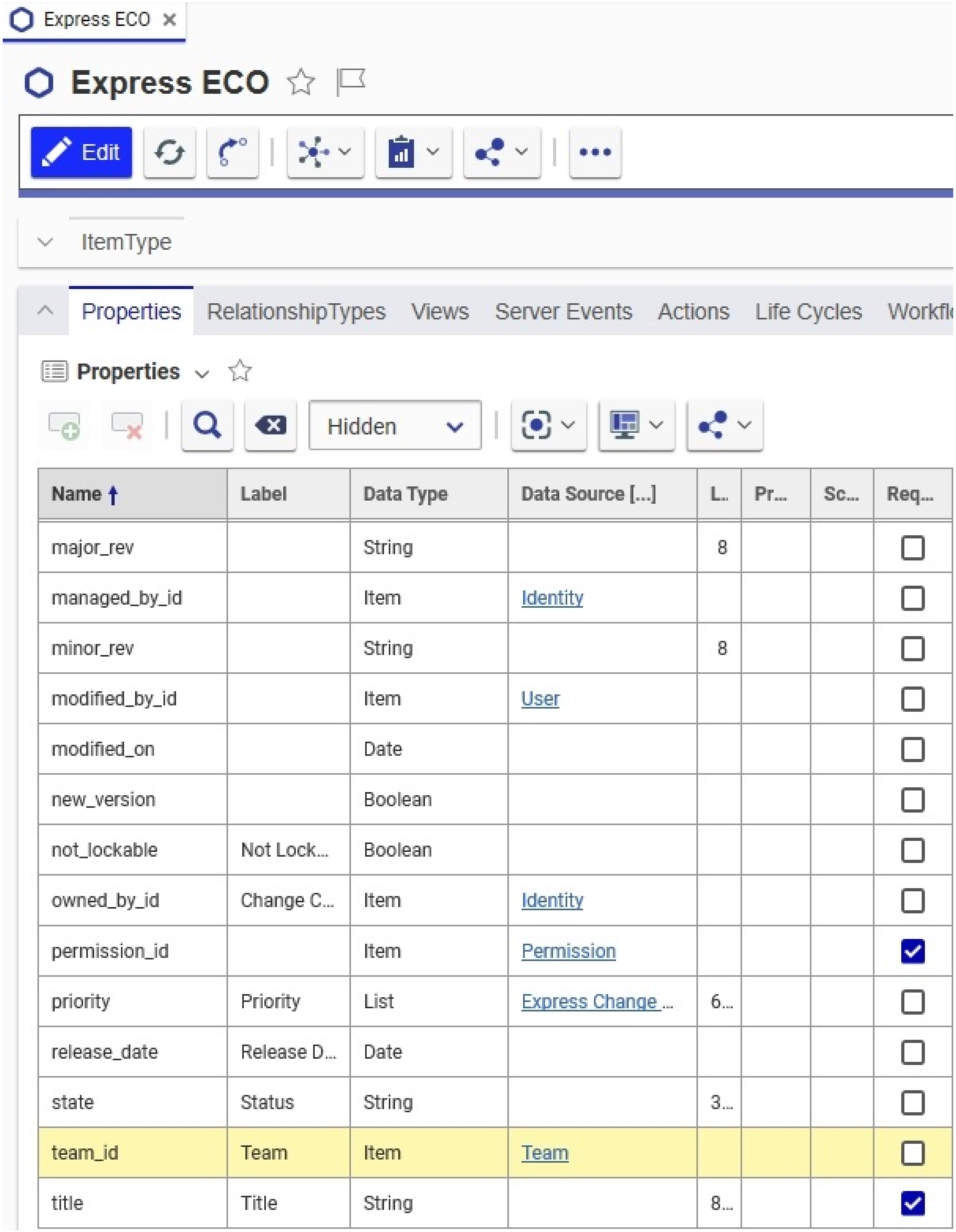
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Name	Label	Data Type	Data Source [...]	L..	Pr...	Sc...	Req...
major_rev		String		8			☐
managed_by_id		Item	Identity				☐
minor_rev		String		8			☐
modified_by_id		Item	User				☐
modified_on		Date					☐
new_version		Boolean					☐
not_lockable	Not Lock...	Boolean					☐
owned_by_id	Change C...	Item	Identity				☐
permission_id		Item	Permission				☑
priority	Priority	List	Express Change ...	6...			☐
release_date	Release D...	Date					☐
state	Status	String		3...			☐
team_id	Team	Item	Team				☐
title	Title	String		8...			☑

Important

PE_SetTeam is a system Method and should not be deleted or modified. However, you can change the second argument of *team.setProperty()* to specify another Team as the default per your business process.

System-Defined Identities

The system defines the following Identities:

- **Aras PLM**—a system Role representing system processes. It does not contain any individuals.
- **Manager**—an individual assigned to the **Designated User** property on the Item view. This Identity is responsible for the management, usage, and review of the Item.
- **Owner**—an individual assigned to the **Assigned Creator** property on the Item view. This Identity is the Item owner.
- **Creator**—an individual assigned to the **Created By** property on the Item. This is the Identity that creates the Item. This property is assigned automatically and cannot be changed.

Important

The Aras PLM Identity permissions must not be deleted or changed.

Users specify the **Manager** or **Owner** of Items by populating the corresponding Item properties. By default, these properties are not required on Item views. If **Manager** or **Owner** is used in Workflow or business processes, you can make the corresponding property required to ensure users will not miss this requirement.

Effectivity Management Identity

The **Effectivity Management** Identity is responsible for managing Effectivity Scopes, Effectivity Variables, and Effectivity on Bill of Materials (BOMs).

By default, the **Effectivity Management** Identity includes the **Administrators** Identity. You can add other User and Group Identities.