

Change Orders

Overview

A **Change Order** is a process used to communicate and track the approval and implementation of changes to a product or process. It serves as a follow-up to a Change Request, ensuring that approved changes are executed effectively and consistently.

If Change Requests (CRs) are the front door of change management in PLM, then Change Orders (COs) are the execution mechanism.

Purpose of Change Orders

A Change Order (CO) is used to formalize, approve, and execute product changes after a Change Request has been reviewed and accepted. It ensures that the approved change is implemented in a controlled, traceable, and coordinated manner across all affected areas. The following are common use cases for initiating a Change Order:

- **Implementing approved changes** - After a Change Request has been evaluated and approved, a Change Order specifies what exactly will change and how the change will be executed.
- **Coordinating cross-functional execution** - Ensures engineering, manufacturing, quality, supply chain, and service teams all act on the same approved change instructions.
- **Managing revisions** - Defines updated revisions of parts, documents, software, or processes that need to be released.

Key Roles in the Change Order Process

- **Change Authors** - Creates new change orders.
- **Change Viewers** - Tracks the status and progress of changes without the ability to edit.
- **Change Manager** - Coordinates changes and manages escalations.
- **Change Administrators** - Configures and oversees the change management process, assists users in case of errors, and resolve exception situations.
- **Team Member** - Executes the change plan and updates the affected items.
- **Change Review Board** - Reviews the implementation plan.
- **Change Verifiers** - Ensure implemented changes have been correctly applied and meet defined requirements.

