

Change Order Workflow Overview

Change Orders progress through a series of activities defined within the workflow:

1. **Create Change Order:** The Creator navigates to **Contents > Unified Change Management > Change Orders > Create New Change Order**. The order is saved as a Draft.
2. **Prepare Implementation Plan:** The Creator enters Change Order details (e.g., Title, Team, Change Manager, Planned Completion Date). They list all Affected Items and choose the required change actions. A manual impact check can be performed to cover dependencies (e.g., add a parent assembly when retiring a part so its BOM can be updated). Once ready, the Creator casts their vote:
 - o **Submit Plan for Review:** Moves the Change Order to the Review Implementation Plan step.
 - o **Execute Plan:** Skips review and moves directly to Execute Change Plan.
 - o **Cancel Change:** Sets the Change Order to Canceled if it's no longer required.
3. **Review Implementation Plan:** The Change Review Board evaluates the plan, including Affected Items, selected actions, dependencies, and timeline. They cast their vote:
 - o **Approve:** Moves the Change Order to Execute Change Plan.
 - o **Rework:** Returns the plan for adjustments.
 - o **Reject:** Terminates the Change Order.
4. **Execute Change Plan:** Assigned Team Members implement the change: they update Affected Items (content, properties, and relationships) and carry out any Change Tasks. When finished, they cast their vote:
 - o **Submit for Audit:** Sends the executed plan to Verify Implementation.
 - o **Complete Change:** Moves to change completion without additional review.
5. **Verify Implementation:** Change Verifiers review the results of execution for technical accuracy and completeness. They cast their vote:
 - o **Complete Change:** Approves the implementation and finalizes the Change Order.
 - o **Re-execute Plan:** Returns the change order to Execute Change Plan for corrections.
6. **Complete Change:** The Change Order is finalized; all tasks are closed and the record is set to Completed.

