

# Managing Automation Rules for Change Process Definition

The steps to create, add, or modify Automations for a Change Process Definition are as follows:

1. Go to the **Contents** → **Unified Change Management** → **Configuration** → **Change Process Definitions**. Search and open it for edit.
2. Go to the **Automation Rules** tab and choose one of the following:
  - o **Add Automations** – Attach one or more existing Automations to the relationship.
  - o **Create Automation** – Build and add a new Automation to the relationship.

| Ena...                              | Event       | Automate For | Fr... | T... | Relationship [...]                           | Re... | Change ... | Classific... | Name  | Description [...]  |
|-------------------------------------|-------------|--------------|-------|------|--|-------|------------|--------------|---|--|
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 2     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> |       |            | Validation   | Selected action is allowed for item type                | Selected action is allowed for the item type.            |
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 3     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> |       |            | Validation   | Item version is current                                 | Item version is the latest current version.              |
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 4     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> |       |            | Validation   | Item is not obsolete                                    | Item cannot be in an obsolete state.                     |
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 5     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> | Part  | Release    | Validation   | Selected action requires item to be in unreleased state | Item cannot be in a released state for 'Release' acti... |
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 6     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> | Part  | Revise     | Validation   | Selected action requires item to be in released state   | Item must be released for 'Revise' and 'Obsolete' ac...  |
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 7     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> | Part  | Obsolete   | Validation   | Selected action requires item to be in released state   | Item must be released for 'Revise' and 'Obsolete' ac...  |
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 8     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> | CAD   | Release    | Validation   | Selected action requires item to be in unreleased state | Item cannot be in a released state for 'Release' acti... |
| <input checked="" type="checkbox"/> | Add, Update | Relationship | 9     |      | <a href="#">ucm_ChangeOrder_AffectedItem</a> | CAD   | Revise     | Validation   | Selected action requires item to be in released state   | Item must be released for 'Revise' and 'Obsolete' ac...  |

The automations tabs are: **Classification**, **Name** and **Description**. Remaining tabs are the conditions triggering the automation.

3. Fill or modify the following columns as appropriate:

| Field          | Description   | Details / Options   |
|----------------|---|---|
| <b>Enabled</b> | Activates or deactivates the automation.  | <ul style="list-style-type: none"> <li>✓ Checked = active</li> <li>✗ Unchecked = inactive</li> </ul>  |
| <b>Event</b>   | Defines what triggers the automation on the context item (e.g., Change Order) or relationship (e.g., Affected Items). | <ul style="list-style-type: none"> <li>• <b>Add</b> – Runs when the context item or a relationship is added. When an item is copied, all automations configured with the <b>**Add**</b> event will execute on the copied item.</li> <li>• <b>Promote</b> – Runs during a lifecycle transition of the context item.<br/>Example: set the Actual Completion Date when a Change Order is completed.<br/>△ Promote works only with Context Items, not Relationships.</li> </ul> |



|                              |  |  |
|------------------------------|--|--|
|                              |  | <ul style="list-style-type: none"> <li>• <b>Update</b> – Runs when the context item or a relationship is modified.</li> <li>• <b>Remove</b> – Runs when a relationship is removed.</li> </ul>  |
| <b>Automate For</b>          | Defines which item triggers the automation.  |  |
| <b>From State / To State</b> | Used only for <b>Promote</b> events. Defines the current and target lifecycle state of the Context Item. | <ul style="list-style-type: none"> <li>• Specific lifecycle states can be selected. To apply to all states, select “<b>Any</b>”.<br/>Example: <b>In Review</b> → <b>To Released. Any</b> → <b>To Released</b>.</li> <li>• The list of values is retrieved from the <b>Filter Value</b> tab within the <b>ucm_TargetLifeCycleState</b> list.</li> </ul> |
| <b>Relationship</b>          | <b>Required if Automate For = Relationship.</b>  | <ul style="list-style-type: none"> <li>• Specify the <b>Relationship Type</b> of the Context Change Item on which the automation applies.</li> </ul>   |
|                              | Optional when used for <b>Promote</b> events.  | <ul style="list-style-type: none"> <li>• Specify the <b>Relationship Type</b> linked to the Context Change Item Type on which the automation applies.</li> </ul>   |
| <b>Related Item Type</b>     | Optional, only used when <b>Automate For = Relationship</b> .  | <ul style="list-style-type: none"> <li>• Specify the <b>Item Type of related items</b> for the selected relationship on which the automation applies.</li> <li>• If left empty, the automation applies to all related item types for the selected relationship.</li> </ul>   |
|                              | Optional when used for <b>Promote</b> events.  | <ul style="list-style-type: none"> <li>• Specify the <b>Item Type of related items</b> for the Context Change Item’s selected relationship on which the automation applies.</li> <li>• If left empty, the automation applies to all related item types for the selected relationship.</li> </ul>   |
| <b>Related Event</b>         | The Change Action(s) that trigger the automation.  | <ul style="list-style-type: none"> <li>• Preconfigured actions are <b>Release, Revise, Obsolete</b>.</li> </ul>  |
|                              | Optional when used for <b>Promote</b> events.  | <ul style="list-style-type: none"> <li>• Specify the <b>Action</b> for the selected relationship on which the automation applies when the Context Change Item is promoted.</li> </ul>  |

The columns **Classification**, **Name**, **Method**, **Description**, and **Automation Type** describe the properties of the selected Automation.



- **Method** – Contains the implementation code that executes the automation (refer to **Section 5** [<i>Configuring Automation items</i> for details.](#))
- **Sequence** – Defines the order in which Automation rules are executed.

### Important

The automation method may need to be modified to accommodate custom Change Actions, processing logic, lifecycle states, and other extensions. Refer to **Section 8** *Configurations for Extending Change-Controlled Items*.

