Workflow Guide for Engineering Change Management

For Microsoft Dynamics NAV Granule ID: 14004800

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HOME ACTION	NS NAVIGATE	REPORT	ECNs Pr Selecte	View ✓ Edit ↑ New ➤ Delete Manage	Get FG Items	Release Reope Process	Make Request	Print Report	Send Approval C Request Request A	Cancel Approval Request	OneNote Notes	Links	Refresh
 Production BOM Certified Routings Routing Links 	Eng. Chan	ge Notices	Description	ECN00016 · L General No.: Prod. FDM No.:	oudspe ECN LS-1	00016 00	Oakwoo	od Delux	e Bill of Material: Router:	V			 Notes Click h
Standard Tasks Families Eltems Stockkeeping Units Eng. Change Notices	ECN00003 ECN00004 ECN00005 ECN00006	1200 1300 1300 1700	Back Wheel Chain assy Chain assy Brake	Description: Current BOM Vers Reason Code: reated By:	ion: DISC	ispeaker100W C	akwood De	eluxe V	Work In Progress Inventory: Design Report: Instuction Manua Other:	s:			
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Product Design Capacities Departments				<			III						>

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Application Description

Objectives

Engineering Change Management brings to Dynamics NAV the ability to:

- 1. Notify the departments that a Change is needed.
- 2. Send a Request for the Change.
- 3. Execute the Change in the "proposed" BOM. (From BOM Versions)

This is a three step process, but depending on the needs of your organization it can be done in as little as 1 Step, with or without approvals required.

Step 1: Initiate a Change Notice. This means that anyone in the organization can "notice" that a change is needed to a Bill of Materials. An initial document is created to notify management that a potential improvement could be made to a BOM.

Step 2: Change Requests: You can start here, or move the initial Notice into a Request. Various department heads can be assigned to review the proposed change and approve the change.

Step 3: Change Order: Start here, or move the Request to an Order. This authorizes a change to the Bill of Materials. The affected items will all be listed on the ECO and the requested adjustments to the master Bill of Materials can now be made. (Edit the BOM or create a new BOM Version depending on your Microsoft License access.)

Since "Documenting" your process is so critical for history and future analysis, this Granule keeps complete history of every step. Upon making a Notice into a Request, a copy of the original Notice is sent to Notices History. This will make it very easy to look back and see all the associated Notices, Requests, and Changes that have taken place.

Key Features

- Written in and developed for Dynamics NAV
- Control your Bill of Material Changes
- Works with base NAV Mfg or "Mfg Plus"
- Specify the reason why a BOM needs to be changed
- Full integration to Document Approval
- History kept on each step of the ECM process
- Integrates with Prod BOM and Versions

Benefits:

- Organize your Changes in a logical fashion
- Document who approved the changes
- Document the reason for the change in the comments
- Always see the "Status" of each Step.
- Track the Creation, Modification, and Implementation Date
- Easily change the Status of Notices, Requests, and Orders
- Keep complete history of the approval process.



Login to View ECM Training Video Here:

2018

ECM Workflow

Objectives

Actively participating during this chapter helps you:

- Learn how to use this application on a daily basis
- Test the daily workflow for your users.

Introduction

This chapter will cover the daily operation of this application.

Operation

This is a three step process, but depending on the needs of your organization it can be done in as little as 1 Step, with or without approvals required.

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Step by Step Guide

Step 1: Initiate a Change Notice. This means that anyone in the organization can "notice" that a change is needed to a Bill of Materials. An initial document is created to notify management that a potential improvement could be made to a BOM.

1		Eng. Change Notices - Microsoft Dynamics NAV	
CRONUS CCSI E	Demo 2016 🕨 Departments 🕨 Eng. Change M	/anagement → Eng. Change → Eng. Change Notices	
	AVIGATE REPORT		
New Edit View Delete	Comments Release Print Process Report	Image: Show as List Chart OneNote Notes Links Find Filter View Show Attached Page	
Departments Financial Management	Eng. Change Notices •	Mew - Eng. Change Notice - 4000 · Bicycle	
 Sales & Marketing Purchase Inventory Jobs Resource Planning Service Manufacturing Eng. Change Management Eng. Change Documents History Setup Warehouse Human Resources Administration 	No. Multi BO Prod. BOM No. Des Doc ECN00001 1300 Cha ECN00002 1000 Bicy 4000 - -	Image ACTIONS NAVIGATE Image Make Request Release Image Image <td>CRONUS (StoneNor Notes Show Attacl</td>	CRONUS (StoneNor Notes Show Attacl
Home		Single-BOM Change Worksheet	^
		Prod. BOM No.: 1000 V Proposed BOM Version: Description: Bicycle	~
Product Design		Eng. Change Notice Subform	*

The above "Notice" is related to Production BOM #1000. The same BOM may be used on multiple Finished Goods. Use the built in function to "find" all affected BOMs.

Engineering Change Management Manual

M		Edit - Eng. Ch	ange Notice - ECI	N00005 · Ch	ain assy			_ □
HOME ACTIONS N	AVIGATE				Eng Chang N	vlgt 20	16 - Eng Change	Mgmt (9-0).
View New New New New New New New New New N	ease Reopen M Process	Aake Print equest Report	Send Approval Cano Request Request App	cel Approval Request roval	OneNote Notes Lin Show Attached	nks	Refresh Clear Filter Pag	 → Go to ♦ Previou ▶ Next
ECN00005 · Chain assy								
General						^	Notes	*
No.: E N0000 Prod. BOM No.: 1 00 Description: Chin ass Current BOM Version: Encode: Reason Code: DISC Created By: CCS UET Creation Date: 12/2 / 20 Last Modified By: CCS ET Last Modified Date: 12/2 / 20 Eng. Change Notice Subform	15 59 KRISTEN 115 RICK 115		Bill of Material: Router: Work In Progress: Inventory: Design Report: Instuction Manual: Other: Other Comment: Status: Approval Status:	 ✓ □ □		*	Click here to cr	eate a new i
Line ▼ ☐ New M Find Fine Action Taken Type	Affected Item	Description	Change Needed		Production	Sub		
Change Purchased	No. 1310	Chain	- Need new vendor	out of stock	Orders 0 0	lten		
Change Finished Good	1300	Chain Assy			0			
<		III				>		

In the above example, only 1 FG used this BOM.

Now the "Notice" is well on its way. Add Lines for the Component Items that are affected.

Item Type	Action Taken	Effected Item No.	Description	Change Needed	Prod Orde
Finished Good	Change	1000	Bicycle		
Einished Good	Change	1001	Touring Bicycle		
Purchased	Add	70040	Drawer	Missed the top drawer. Please.	
Purchased	Remove	1500	Lamp		
•					•

You are basically making recommendation as to "Add", "Remove", or "Change" items on the current BOM Version. (IE: Version #11)

ECM fully supports "Line Comments" to give you lots of room to document the reason or what you have noticed on the target BOM.

_	Last Modified Date	e: 12/24/20	15		Approval Status:	
	Eng. Change Not	tice Subform				
	Line 🝷 🗂 New 🕯	Find Filte	er 🛛 🛼 Clear Filte	er		
	Comments	þe	Affected Item No.	Description	Change Needed	
_	Change P	urchased	1310	Chain	Need new vendor of	out of stock
q						

Comments are also available on the Document Header.

	ECN-000	01 - Eng. (Chang	e Noti	ce						
G	eneral										
N	lo		E	ECN-00	001		P		Bill of Mater	ial 🛛	
P	rod. BOM	No	[10	00 主			Router	🔳	
	escription	n	Ę	jicuclo					Work In Dre		
0	Current BC	OM Version	[E	CM N	otice E	CN-00001	- Eng. (Change Comn	nent S 🗖 🖻	×
R	leason Co	de			Date		Comment				
0	reated By		[12	2/23/10	Customer i	eporte	d sparks coming	from the control	
0	reation D	ate	[and insiste	d the le	ad wire was no	t strong enough.	
L	ast Modifi	ed By	[*)	·						_
L	ast Modifi	ed Date ,	[-						_
											=
	Item Type	Action Taken	Effeo Item	E							
	Fini	Change			-						
	Fini	Change									-
	Pur	Add	_	-							
	Pur	Remove								Help	
				_							
				<u> </u>	otice	-	Line	-	<u>F</u> unctions	Make <u>R</u> equest	

You can gain quick access to the Master BOM and BOM Version from "Notice".

M				E	Edit - En	g. Change Notice			
т ном	IE ACTION	S NAVIGATE							
Image: Comments Image: Comments Image: Comments Image: Comments									
ECN000	05 · Chain	assy							
General									
No.:	E	CN00005				Bill of Material:			
Prod. BON	1 No.: 1	300			~	Router:			
Descriptio	n: 🤇	Chain assy				Work In Progress:			
Current BC	OM Version:					Inventory:			
Reason Co	ode: [DISC			~	Instruction Manual:			
Created B	y:	CSNET\KRISTEN		Other:					
Creation E	Date: 1	2/21/2015				Other Comment:			
Last Modi	fied By:	CSNET\RICK		a		Status:			

The standard NAV Document Approval system is used for approvals of Notices, Requests, and Change Orders. (See ECM Approval Workflow)

	1				Edit	- Eng. Change	Notice - ECN00005 ·	Chain assy			
1 E	Eng Chang N	HOME	ACTIONS N	AVIGATE				E	ng Chang Mgt 20)16 - Eng Change	e Mgmt (9-0)
E	ACTIONS		laster Prod. BOM urrent Prod. BOM	Version							
	1					View	- Approval Entries				
Ed	HOME	ACTIONS	NAVIGATE			L		_	Eng Chang	g Mgt 2016 - Eng	g Change Mg
BC	Delegate Record	rd Comments	Show Show as List Char View	as OneNote Notes Lind Show Attached	ks Refresh	Clear Filter Page					
ks ask	Approval Er	ntries -					1	Type to filter (F3)	Limit Type	-	→ v
ng	Overdue	Limit Type	Approval Type	To Approve		Details		Sequen. No	Status	No filters ap Sender ID	plied Salesper Code
e l		No Limits	Workflow User G	oup Eng. Change Header:	ECM Notice,EC	N000 Eng. Chan	ge Header: ECM Notice,EC	N00005	1 Canceled	CCSNET\SA	
e F											
e (

The Document Approval can be skipped, if you do not want to activate the approval workflow, just "Release" the document.

Step 2: Make "Notice" into "Request". This means that the Notice has been deemed worthy of requesting a change. So, its importance has been increased to "Request". Potentially different approvers need to be assigned before it can become a Change Order.

To change the status of a Notice to a "Request", use the "Make Request" button.

	1				Edit - Eng	g. Change Notice	e - ECN00005 · C
🕒 💽 🗖 Eng Chang N	HOME ACTIO	ONS NAVIGATE					
HOME ACTIONS	View Delete Manage	et FG tems Process	Make Request	Print Report	Send Approva Request Reque	Cancel Approval Request st Approval	OneNote Notes
New Manage	ECN00005 · Chai	in assy					
 Production BOM Continued 	General						
Routings	No.:	ECN00005				Bill of Material:	✓
Routing Links	Prod. BOM No.:	1300			~	Router:	
Standard Tasks –	Description:	Chain assy				Work In Progress:	
Families	Current BOM Version:	n:				Inventory:	
Items	Reason Code:	DISC			~	Design Report:	
Eng. Change Notices	Created By:	CCSNET\KRISTEN				Other:	
Eng. Change Requests	Creation Date:	12/21/2015				Other Comment:	
Eng. Change Orders	Last Modified By:	CCSNET\RICK				Status:	Open
Approval Entries Approval Request En	Last Modified Date:	12/24/2015				Approval Status:	
	Eng. Change Notice	Subform					
	Line 👻 🗋 New 🏙 F	ind Filter 🗏 Clear	Filter				

Upon "Make Request":

1. Copy of original is placed in History.



2. "Engineering Change Request" is created.

Engineering Change	C	ECR-00001 - Eng. Change Request	
Eng. Change Requests	=	General	
		No ECR-00001	Bill of N
		Brad ROM No.	Boutor
			Kouter
🗉 🗀 Documents		Description Hub	Work I
		Current BOM Version	Invent

The Proposed BOM Version – Very Important.

This step is the key to the whole ECM process. The Engineers have designed and are "proposing" a new Version (IE: Version 2). It has not been certified yet, it is just "New". The Engineers are seeking approval to this Version that has been added (manually) in the Production BOM Management section.

	Ed	it - Eng. Cl	hange Request - EC	R00007 · Chain assy
HOME ACTION	S NAVIGATE			
View Manage	FG Release Reopen Make Order	Print Report	Send Approval Cance Request Re Request Appro	I Approval equest val Show
ECR00007 · Chain	assy			
General				
No.:	ECR00007		Bill of Material:	✓
Prod. BOM No.:	1300	~	Router:	
Description:	Chain assy		Work In Progress:	
Active Version:	V1		Inventory:	
Proposed BOM Version:	V3	~	Design Report:	
Reason Code:	FAULT	~	Other:	
Created By:	CCSNET\KRISTEN		Other Comment:	*Please Rush*
Creation Date:	12/23/2015		Status:	Open
Last Modified Dut		-	1	

Note: The Proposed BOM Version has NOT been approved or certified until the "Approvers" say it is ok to make this the new active version.

Step 3: Make "Request" into "Engineering Change Order". This means that the Request has passed all approvers and now final approval needs to be given. It is now time to create a "proposed" BOM Version for this Change Order. (This process may have been done in Step #2 already)

The ECO references the "Proposed" new Version of the BOM. The proposed Version is left "Under Development" or "New" until the ECO is approved and "Posted". Upon "Posting", the proposed new version is automatically changed to "Certified" and now becomes the "Active Version".

	Edit - Er	ng. Change Order - E	CO00006 · Chain assy		
HOME ACTION		0 0		Eng Chang I	Mgt 2016 - Eng Ch
View Celte Manage	per Post Post Process Rep	rint Send Approval Ca Request	ancel Approval Request Deproval Sho	e Notes Lin	ks Refresh Cl Fi
ECO00006 · Chain	sy Now "P	roposed Ver"			
General	become	es "Certified"		^	Notes
No.:	ECO00006	Effective Date:	2/1/2016	~	Click here to creat
Prod. BOM No.:	1300	 Bill of Material: 	✓		
Description:	Chain assy	Router:			
Active Version:	V1	Work In Progress:			
Proposed BOM Version:	V3	 Inventory: 			
Reason Code:	FAULT	Design Report:			
Created By:		Instu Manual:			
Creation Date:	12/22/2015	Othe			
		Other Comment:	Rush Please		
Last Modified By:	CCSNET\SAM	Approval Status:		~	
Last Modified Date:	12/23/2015	Status:	Open	~	
When to implement:	Effective Date	~			
Eng. Change Order Sul	bform			^	
Line 🝷 🗋 New 🎢 Find	Filter 茨 Clear Filter				
Action Taken Type	Affected Item Description No.	n Change Neede	d	Producti Orde	
Change Purchas	ed 1310 Chain	Replace defection	ve chain		

Note: All features are available at all levels: Approval or No Approval, Header Comments, Line Comments, History, Printing the document, etc.

						Print Preview	
Eng. Change Or	der						
l	N 8	100%	•	Find	Next		
		Γ	Engine	ering Chang	ge Order	No.	ECO00006
croni	is	L		Puch Plass			Page: 1
CIOIR	JJ •			Rush Flease	Broduction R		1 aye. 1
					Production E		1300
CRONIUS USA Jac					Des	cription	Chain assy
7122 South Ashford Stra	ot				Current BOM	Version	V1
Westminster	er			Date Created	Created By:	Reason for Change	Status
Atlanta, 31772				12/23/2015	COSNET/KRISTEN	FALILT	Open
Purchased Chang	e	Substitue Item No	. Sul	bstitute Descritpio	n Replac	e defective chain	
Web Site:			Pł	none: 0666-666-6	666	Fax: (0666-666-6660
Inpact of Change:		Due	Date	Approvers			
Bill of Material	Yes						
Router	No						
Work in Progress	No						
Inventory	No						
Design Report	No						
Instruction Manual	No						
Rush Please							

Final Comments:

1. The ECO can have a delayed implementation. You assign the time to implement the change on the header of the ECO.

📰 ECO-00001 - Eng. Change Order	
General	
No ECO-00001 📖 🅒	When to implement
Prod. BOM No 1000 💼	Effective Date
Description Bicycle	Bill of Material Effective Date
Current BOM Version 11	Router

2. The NAV 2016+ Version now uses the new "Workflow Feature" for Document Approval.

We recommend you contact your NAV Consultant for assistance on this new feature. (Yes, we can help too.)

1		Edit - Eng. Change Reques	t - ECR00005 · Back Wheel		_ D X
HOME ACTION	S NAVIGATE			Eng Chang Mgt 2016 - Eng Change	Mgmt (9-0) - ccss10.ccsnet 🕜
View Celt View Celte Manage	G Release Reopen Make process Process Print Report	pprove Reject Delegate Commer Approve	Ats Send Approval Cancel Approval Request Approval	OneNote Notes Links R	G to Previous Filter Next Page
ECR00005 · Back V	Vheel			_	
General				^	Workflows * •
No.:	ECR00005	Bill of Material:			Active Workflows
Prod. BOM No.:	1200	✓ Router:			ECM Approval Workflow
Description:	Back Wheel	Work In Progress:			
Active Version:		Design Report:			
Proposed BOM Version:		Instuction Manual			
Reason Code:	FAULT	✓ Other:			
Created By:	CCSNET\KRISTEN	Other Comment:		L	
Creation Date:	12/23/2015	Status:	Pending Approval	~	Notes 🔹
Last Modified By:	CCSNET\KRISTEN	Approval Status:		View - Work	flow Overview
Last Modified Date:	12/23/2015		T LIONE	VIEW - WOIN	Too Chara Mat
Eng. Change Request S	Subform			V A A	Eng Chang Mgt
Line 👻 🗋 New 🏙 Find	Filter 🛛 🕏 Clear Filter		- 🐙 📒 😓 📈	× 🛍	
Action Taken Type	Affected Item Description No.	Change Needed	OneNote Notes Links Refresh	n Clear Find Filter	
Change Purchas	ed 1120 Spokes	Testing	Workflow Step	Status Last Modified	Last
			Worknow Step	Date-Time	Modified
			Approval of an Eng. Change d	Completed 12/23/2015 11:11	CCSNET\KR
			Add record restriction.	Completed 12/23/2015 11:11	CCSNET\KR
1			Set document status to Pen	Completed 12/23/2015 11:11	CCSNET\KR
			Create an approval request f	Completed 12/23/2015 11:11	CCSNET\KR
			Send approval request for t	Completed 12/23/2015 11:11	CCSNET\KR
			An approval request is approved.	Active 12/23/2015 11:11	CCSNET\KR

ECM Approval Workflow

1. Set Up Approval Users Dept>Admn>Aplctn Setup>Workflow>Approval User Setup

•	HOME	ACTION	NS NA	VIGATE										
ר <mark>א</mark> ר			\mathbf{X}		¢	١ <u>م</u>					S	$\mathbb{Y}_{\!\!\times\!}$		
Ne	w Vie Lis	w Edit t List	Delete	Approval User Setup Test	Notification Setup	Show as List	Show as Chart	OneNote	Notes	Links	Refresh	Clear Filter	Find	
Ne	w	Manag	e	Proc	ess	V	liew	Show	w Attach	ed		Page		

Approval User Setup -

User ID	*	Salespers./ Code	Approver ID	Sales Amoun	Unli Sale	Purchase Amoun	Unli Purc	Request Amoun	Unli Req	Substitute	E-Mail
CCSNET\CAROLYN											carolyn@costcontrolsoftware.com
CCSNET\KRISTEN			CCSNET\RICK								kristen@costcontrolsoftware.com
CCSNET\RICK			CCSNET\SAM								rick.baxter@costcontrolsoftware.com
CCSNET\SAM											sam@costcontrolsoftware.com
CCSNET\DOUG											doug@costcontrolsoftware.com

2. Set up Workflow Users Dept>Admn>Aplctn Setup>Workflow> Workflow User Groups

- a. Sequence No. 1 / 1 Both receive approval at same time
- b. Sequence No. 1 / 2 Rick receives first after he approves. Sam receives

🚮 Edit - Worl	cflow User Group - ECMAPPROVAL · ECM A	.ppr 💻 🗖 🗙
- HOME	Eng	g Chang Mgt 2016 🕐
View View Manage	ete OneNote Notes Links Refresh Clear Show Attached Page	 → Go to ♦ Previous ▶ Next
ECMAPPR	OVAL · ECM Approval Group	
Code:	ECMAPPROVAL]
Description:	ECM Approval Group	
Workflow Us	er Group Members	^
🛅 New 🏙	Find Filter 📡 Clear Filter	
User Name	▲ Sequence No.	
CCSNET\RI	СК 1	
CCSNET\S/	AM 2	
		ОК

www.CostControlSoftware.com

3. Start Job Queue

Dept>Admn>Aplctn Setup>Job Queue> Job Queues

(Either by pressing 'Start Job Queue' or by checking 'Start Automatically' From NAS)

 HOME ACTIONS 						
View Celete Manage Proce	top Job Queue ss Show Attached	Refresh Clear Filter Next Page	s			
DEFAULT						
General						
Code:	DEFAULT			Server Instance ID:		2018
Description:	Default Job Queue			Session ID:		5
Job Queue Category Filter:			~	Running as User ID:	CCSNET\KRISTEN	
Started:				Running on Server Computer:	ccss10.ccsnet.local	
Last Heartbeat:	12/15/2015 4:35 PM			Running on Server Instance:	dynamicsnav90	
NAS Settings						
Start Automatically From NAS:				Start on This NAS Instance:		
Start on This NAS Computer:			~			

4. Set Up SMTP E-Mail [Optional]

Dept>Admn>IT Admn>Services>SMTP Mail Setup

			Edit - SMTP	Mail Setup	
HOME AC	TIONS				
View Edit Ag	pply Office 305 Test Email Berver Settings Setup Process	IneNote Notes Links	Refresh Clear Filter Page	o ious t	
MTD Mail Co	tup				
NVITP IVIAILSE	tup				
General					
SMATD Service	emea.064d.cloudmail.micro	osoft.com		User ID:	
SIMILE SELVER:					
SMTP Server Port:	25			Password:	

5. **Set Up Notification Method** Admn>Aplctn Setup>Notifications>Notification Templates

▼ HOME	ACTIONS			_
New View	Edit Delete Export Tem	plate Import	Show Show as	One
List	List Conter Manage	t Template Content Process	as List Chart View	
Notification	Templates •	Notification	Turne Def	a.ult
coue 🔺	Description	Method	Type Der	aun
APPROVAL	Generic notification for approva	als Note 🗸	Approval	~
NEW RECORD	B 1	and a second	New Percent	
	Basic notification for a new reco	ord E-mail	New Record	 ✓
OVERDUE	Generic notification for a new reco	e approv Note	Overdue	 Image: A start of the start of

6. Set up Notification Schedule Admn>Aplctn Setup>Notifications>Notification Setup

🔹 Н	OME	ACTION	S				
×Ъ			$\boldsymbol{\times}$		Q		
New	View List	Edit List	Delete	Notification Schedule	Show as List	Show as Chart	OneNote Not
New		Manage		Process	1	/iew	Show Att
Notifi Type	ication	▲ No Ter	tification mplate Co	Non-Age ode Notificat	gregated ions	Schedu	le
New R	Record	NE\	N RECOR	D	✓	Instantly	/
Appro	val	APF	PROVAL		~	Instantly	/
Overd	ue	OV	ERDUE		✓	<u>Daily</u>	

Approval



7. Import ECM Approval Workflow File

Administration > Application Setup > Workflow > Workflows > Import From File

C D Chang Mgt	2016 Departments Administration	Application Setup Workflow Wo	rkflows		
HOME ACTIONS NA	VIGATE				
New New Workflow Copy from Template Workflow New	Import from File Process	tte OneNote Notes Links Refre	sh Clear Filter Page		
Departments Financial Management	Workflows •				
 Sales & Marketing Purchase 		umanta k	Import		∨ Ċ Se
Varehouse	📔 💮 🐨 🔨 📗 🖡 This PC 🕨 Doc	uments 🖡			
 Warehouse Manufacturing Eng. Change Management 	Organize - New folder	uments •			
 Warehouse Manufacturing Eng. Change Management Jobs 	Organize - New folder		ate modified	Туре	Size
 Warehouse Manufacturing Eng. Change Management Jobs Resource Planning 	Organize View Folder Favorites Desktop Occurrent Desktop Occurrent Desktop	Date files	ate modified /16/2015 9:45 AM	Type File folder	Size

After importing, Workflow appears under Engineering Change Management category



8. Verify that ECM Setup created the ECM Header line in the Workflow Table Relations

Departments>Administration>Application Setup>Workflow>Workflow – Table Relations

CRONUS Test Departments Administration	n Application Setup Workflow		Search (Ctrl+F3)
a	Edit - Wo	rkflow - Table Relations	
HOME			CRONUS Test - Eng Change Mgmt (9-0) - ccss10.ccsnet.loca
New View Edit Delete Show Show as List Manage View	as the Notes Links Refresh	Clear Find Filter Page	
Workflow - Table Relations -			Type to filter (F3) Table ID 🔹 🚽
			No filters applied
Table ID 🔔 Table Caption	Field ID 🔺 Field Caption	Related Related Table Caption Table ID	Related Related Field Caption
18 v Customer	0	454 Approval Entry	22 Record ID to Approve
23 Vendor	0	454 Approval Entry	22 Record ID to Approve
27 Item	0	454 Approval Entry	22 Record ID to Approve
36 Sales Header	0	454 Approval Entry	22 Record ID to Approve
38 Purchase Header	0	454 Approval Entry	22 Record ID to Approve
38 Purchase Header	3 No.	122 Purch. Inv. Header	111 Pre-Assigned No.
38 Purchase Header	165 Incoming Document Entry	No. 130 Incoming Document	1 Entry No.
81 Gen. Journal Line	0	454 Approval Entry	22 Record ID to Approve
122 Purch. Inv. Header	3 No.	81 Gen. Journal Line	36 Applies-to Doc. No.
130 Incoming Document	1 Entry No.	38 Purchase Header	165 Incoming Document Entry No.
130 Incoming Document	1 Entry No.	454 Approval Entry	3 Document No.
232 Gen. Journal Batch	0	454 Approval Entry	22 Record ID to Approve
454 Approval Entry	3 Document No.	130 Incoming Document	1 Entry No.
14004781 Eng. Change Header	0	454 Approval Entry	22 Record ID to Approve

9. Verify Approver Type under Response Options

Dept>Admn>Aplctn Setup>Workflow>Workflows>ECM Approval Workflow

ส์		Ed	it - Workflow - CC-EC	CMAW-01 · E	CM Approval Workflow	
HOME	ACTIONS NAVIGAT	E				CRONUS USA, Inc Eng Cha
View Cedit View Delete Manage	Import Export V from File to File	Jorkflow Step Archived Workflow Instances Step Instances Process	OneNote Notes Link	ks Refresh	Go to Previous Clear Filter Page	
CC-ECMAW	-01 · ECM Appro	oval Workflow 1.	Highlight line 1	1	2. Press Hot Key	
Code: CC	-ECMAW-01					
Description: EC	M Approval Workflow					
Category: EC	М	~				
Enabled:						
Workflow Steps	5					** ^
Decrease Inde	ent 🕨 Increase Indent	🗙 Delete Event Condition 📋	New 🏙 Find			
When Event		On Condition		Then Respons	e	<u> </u>
Approval of a	n Eng. Change docu	Document Type: ECM Notice/ECM	1 Request ECM Order, S	(+) Add record	I restriction.	
An approva	l request is approved.	Pending Approvals: 0		(+) Remove re	cord restriction.	
An approva	l request is approved.	Pending Approvals: >0		Send approval	request for the record and create	e a notification.
An approva	l request is rejected.	<always></always>		(+) Reject the	approval request for the record a	nd create a notification.
An approva	l request for an Eng. C	Document Type: ECM Notice, Stat	us: Pending Approval	(+) Cancel the	approval request for the record a	and create a notification.
An approva	l request is delegated.	<always></always>		Send approval	request for the record and create	e a notification.

-Highlight Line 1 of the Workflow Steps (See 1. Above)

-Press the Hot key to drill into the Response lines (See 2. Above)

-Highlight the "Create an approval request..." line (See 3. Below)

Add record restriction.					
Set document status to Pending Approval.					
Create an approval request for the record using approver type Workflow User Group and workflow user group code ECMWORKFLOWUSERS.					
Send approval request for the record and create a notification.					

At the bottom left of the highlighted response page select approver type & group

Options for the Selected Re	sponse	A Soloot Approval Group	Л
Show Confirmation Message:	✓	4. Select Approval Group	<u>'</u>
Due Date Formula:			
Delegate After:	Never		~
Approver Type:	Workflo	ow User Group	~
Workflow User Group Code:	ECMWO	ORKFLOWUSERS	~

Open Approval User Setup

[**You will want to select the Workflow User Group created earlier in the third setup step**]

(Approver Type can be a single "Approver" or a Workflow User Group)

Approver Type:		Workflow User G
Workflow User G	roup Code:	Salesperson/Pur
Open Approval U	Approver	
		Workflow User G

10. Confirm that 'Workflow Event/Response Combinations' are correct

Departments>Administration>Application Setup>Workflows

Workflow Event/Response Combinations													
Supported Responses													
And Find													
Preceding Event		Rem reco	Apply the	App the	Crea a pa	Post the	Rec the i	Send the i	Can the	Check if th	Check if th	Crea and	Crea an a
An approval request for an Eng. Change document is canceled.		✓		✓			✓	✓					
Approval of an Eng. Change document is requested.		✓		✓			◄	✓					✓

11. Enable workflow

Dept>Admn>Aplctn Setup>Workflows

пí		Edit - Workflow - CO	C-ECMAW-01 · ECM Approval Workflow			
- HOME	ACTIONS NAVIGATE					
View Ne Manage	it ew elete Import Export Workflow from File to File Instan Proc	Step Archived Workflow Step Instances ess Show Atta	s Links Refresh Clear Filter Next			
CC-ECMA	AW-01 · ECM Approval V	Vorkflow				
Code:	CC-ECMAW-01					
Description:	ECM Approval Workflow					
Category:	ECM	~				
Enabled:		Check to En	able			
Workflow S	iteps		** ^			
A Decrease	Indent 🕨 Increase Indent 🔀 D	elete Event Conditions 🗂 New 🏦 Find				
When Eve	ent	On Condition	Then Response			
of an Eng.	Change document is requested. 🗸	Document Type: ECM Notice ECM Request EC	CM (+) Add record restriction.			
An app	roval request is approved.	Pending Approvals: 0	(+) Remove record restriction.			
An app	roval request is approved.	Pending Approvals: >0	Send approval request for the record and			
An approval request is rejected. <always> (+) Reject the approval request for the r</always>						
An app	roval request for an Eng. Change	Document Type: ECM Notice, Status: Pending	Ap (+) Cancel the approval request for the rec			
An app	roval request is delegated.	<always></always>	Send approval request for the record and			
<	ш		>			

12. Add "Overdue Approval Requests Workflow" from Workflow templates

Press "New Workflow from Template">Administration>Overdue Approval Requests...

HOME ACTIONS NAVIGATE New Workflow Templates Image: ConeNote I		IUS USA, Inc. + Departments + Administration +	Application Setup Workflow Workflows
New Workflow remplates Image: Second Sec	HOME ACTION	NS NAVIGATE	
Departments New Manage Show Attached Page Enabled > Financial Manarement New Manage Show Attached Page Enabled > Purchase Workflow Templates • Enabled > Warhouse Type to filter (F3) Description • • • • Enabled > Eng. Change Manage Description • • • • Enabled > Jobs Description • • • • Enabled > Eng. Change Manage Description • • > Jobs Portule Approval Requests Workfl • • Human Resources • • Finance • • • Administration • • Integration • • • Int Administration • • Integration • • • Sales and Marketing • · · · · · · · · · · · · · · · · · · ·	New New Workflow from Template New	Workflow Templates	ete OneNote Notes Links Refresh Cli Show Attached Pa
Purchase Workflow Templates * Enabled Warehouse Type to filter (F3) Description * * Enabled Manufacturing Description * Jobs Resource Planning Description Service Overdue Approval Requests Workfl > Human Resources Integration > Administration > Integration It Administration > Sales and Marketing Users Sales Documents Sales & Marketing > Purchase > Warehouse Manufacturing Resource Planning - Service - Human Resources - Nanufacturing - Resource Planning - Service - Human Resources - Job Queue -	Departments Financial Management Sales & Marketing 	New Manage Show Attached Page	
Manufacturing Eng. Change Manager Jobs Resource Planning Service Human Resources Administration Finance Administration It Administration It Administration It Administration It Administration It Administration Service Human Resources Sales and Marketing Sales Documents Sales Marketing Purchase Warehouse Manufacturing Resource Planning Service Human Resources Job Queue	Purchase Warehouse	Workflow Templates	Enabled
Jous Administration Pervice Uverdue Approval Requests Workfl Human Resources Finance Administration Finance It Administration Purchase Documents Application Setup Sales and Marketing Users Sales Documents Pinancial Manager Sales Documents Varehouse Manufacturing Resource Planning Finance Varehouse Financial Manager Varehouse Financial Manager Varehouse Finance Manufacturing Finance Resource Planning Finance Varehouse Financial Manager Service Financial Manager Human Resources Financial Manager Job Queue Financial Manager Service Financial Manager Human Resources Finance Job Queue Financial Manager Job Queue Financial Manager Human Resources Financial Manager Job Queue Financial Manager Job Queue Financial Manager Job Queue	 Manufacturing Eng. Change Managen 	Description	
Jerrice Human Resources Administration IT Administration IT Administration Application Setup General Users Users Sales and Marketing Users Sales Documents Sales Admarketing Purchase Varehouse Manufacturing Resource Planning Service Human Resources Job Queue	Resource Planning	Administration	
 ▷ IT Administration ▷ Application Setup General Users ▷ Sales and Marketing ▷ Sales Documents ▷ Sales Documents ▷ Sales Marketing ▷ Sales Marketing Purchase ▷ Sales & Marketing Purchase ▷ Warehouse Manufacturing Resource Planning ▷ Service Human Resources Job Queue ► Home ► Journals 	Human Resources	Verdue Approval Requests Workfl Finance	
General > Sales and Marketing Users > Sales Documents > Financial Managen - > Sales & Marketing - Purchase - > Warehouse - Manufacturing - Resource Planning - > Service - Human Resources - Job Queue -	 IT Administration Application Setup 	Integration Purchase Documents	
 Financial Managen Sales & Marketing Purchase Warehouse Manufacturing Resource Planning Service Human Resources Job Queue 	General Users	 Sales and Marketing Sales Documents 	
Home Journals	 ▷ Financial Managen ▷ Sales & Marketing Purchase ▷ Warehouse Manufacturing Resource Planning ▷ Service Human Resources Job Queue 		
d Journals	Home		
	a Journals		
Worksheets OK Cancel	Worksheets	OK Cancel	

13. Enable "Overdue Approval Requests Workflow"

Image: Book of the second se													
HOME	ACTI	ONS	NAVIG	ATE									CRONUS
View View De	it :w :lete f	Import rom File	Export to File	Workflow Ste Instances	ep Archived Workflow Step Instances	OneNote	Notes	Links	Refresh	Clear Filter	 → Go to ♦ Previou Next 	15	
Manage				Process		Show	v Attach	ed		Pag	e		
MS-OVEF Code:	RDUE-	01 · O	verdu	le Appro	val Requests W	orkflow							
Description:	Overdu	e Approv	al Reque	sts Workflow									
Category:	ADMIN				~								
Enabled:													
Workflow S	teps												
 Decrease 	Indent	Incre	ase Inde	nt 🗙 Delet	e Event Conditions 🖞	New 🏙 F	ind						
When Eve	ent				On Condition				The	n Respo	nse		
The over	due appro	oval notifi	ications	batch job	<always></always>				Crea	te notifi	cation for o	verdue ap	oproval requests.

Just Added (5/1/2016) – Multi-BOM Mode!

ECM for Dynamics NAV 2016 and above

Two Different Modes:

- 1. Single Production BOM Changes
 - Create Proposed Production Version (Master)
 - Submit for Approval. (Optional)
 - Carry out Change
- 2. Multiple Production BOM Changes
 - Actions: Add Items, Change Items (Swap existing), Delete Items
 - Create Change Worksheet
 - Submit for Approval (optional)
 - Carry out Changes

This new feature lets you "Add", "Change", "Remove" components across Multiple BOM Masters.

You simply select Multi BOM Lines, Fill out the first desired change, then Create ECM Preview Lines.

If you want to do more, you can select a different action, and then use Create again to generate more ECM preview Lines.

Once you are ready to create the new Versions or change existing versions, you just select "Make Request". (Approval Process is optional too.)

Mew - Eng. Change Notice - 4001 · Multiple BOM Management Sample									
HOME ACTIONS	NAVIGATE				CRONUS CCSI De	mo 2016 - (CCSI Demo v2016 - c		
View Celit View Delete Manage	Get FG Create Item: ECC lines Drox ess	Print Comments Report	Amaster Prod. Bi Current Prod. B Approvals Approve	OM Version Send Appro Request Req	val Cancel Approval Request uest Approval	Show Att	Note s Clear Fil → Go to ached		
4001 · Multiple BOM I	Manager lent Sample								
General						^	Links		
No.:	4001	Last Moo	dified By:	CCSNET\RICK			Link Address		
Multi BOM Mode:		Last Mod	dified Date:	10/15/2016	1				
Description:	Multip / BOM Management Sample	Header (Comment:	Sample by Rick					
Reason Code:	ТЕСН	✓ Status:		Open		*			
Created By:		Approva	l Status:			~			
Creation Date:	5/1/ 016								
					✓ Show more	e fields			
Multi BOM Change Multi		A to B							
IVIUITI-BOM Change Worksh	neer						< 111		
Action:	Gange	Substitut	te Item No.:	1170		~	Notes		
Affected Item No.:	160	Substitut	te Description:	Tube			Click here to create		
Current Description:	ire	Comme	nt:	Swap All part A with part	В.				
Quantity Change:		0 Applies 1	to all ECM Lines	7					
Quantity Change Mode:	Add or Substract from Qty	Recertif	y BOM:	▼ ▼					
Auto BOM Line Add/Remove	Normal	~	-						
Eng. Change Notice Subform	m					** ^			
Line 👻 🦘 Reset Sort 斗 Pro	oduction BOM List 🗂 New 🏙 Find 🛛 Filter	er 🛛 🍢 Clear Filter							
Sele Action Typ	pe Prod. BOM BOM Descripti No.	ion	Affected Item No.	Description	Old Qty.	New Qty			
Change Pure	chased 1100 Front Wheel		1160	Tire	1				
Change Pure	chased 1200 Back Wheel		1160	Tire	1				

Support

Congratulations on your purchase of Engineering Change Management! We couldn't be more thrilled for you. Soon, you will be on your way to enjoying and utilizing the features and functionality of this product.

On behalf of NAV Software, NAV Solution Centers and NAV Service Providers, we thank you for your business. Most importantly, Cost Control Software sincerely appreciates your trust in our products.

Should you have any questions or comments regarding our product, we encourage you to contact your local NAV Solution Center (NSC). Please also contact your NSC if you are considering modifications or seeking new software functionality.

Cost Control Software provides many add-on products that may be just the solution you were looking for. Your NSC can provide you with our complete list of add-ons. You may also check out our website to see available add-on products as well.

Produced and Distributed by: <u>Cost Control Software, Inc.</u> 12409 Old Meridian Street

Carmel, IN 46032

Phone: (317) 846-6025

We love customer feedback! Good or Bad, we want to know what you think of this Granule and how you use it in your Business Model. If you would be willing to show us, we would love to see your successes. Just call us for a Show and Tell.