Workflow Guide for
Engineering Change Management

For Microsoft Dynamics NAV
Granule ID: 14004800
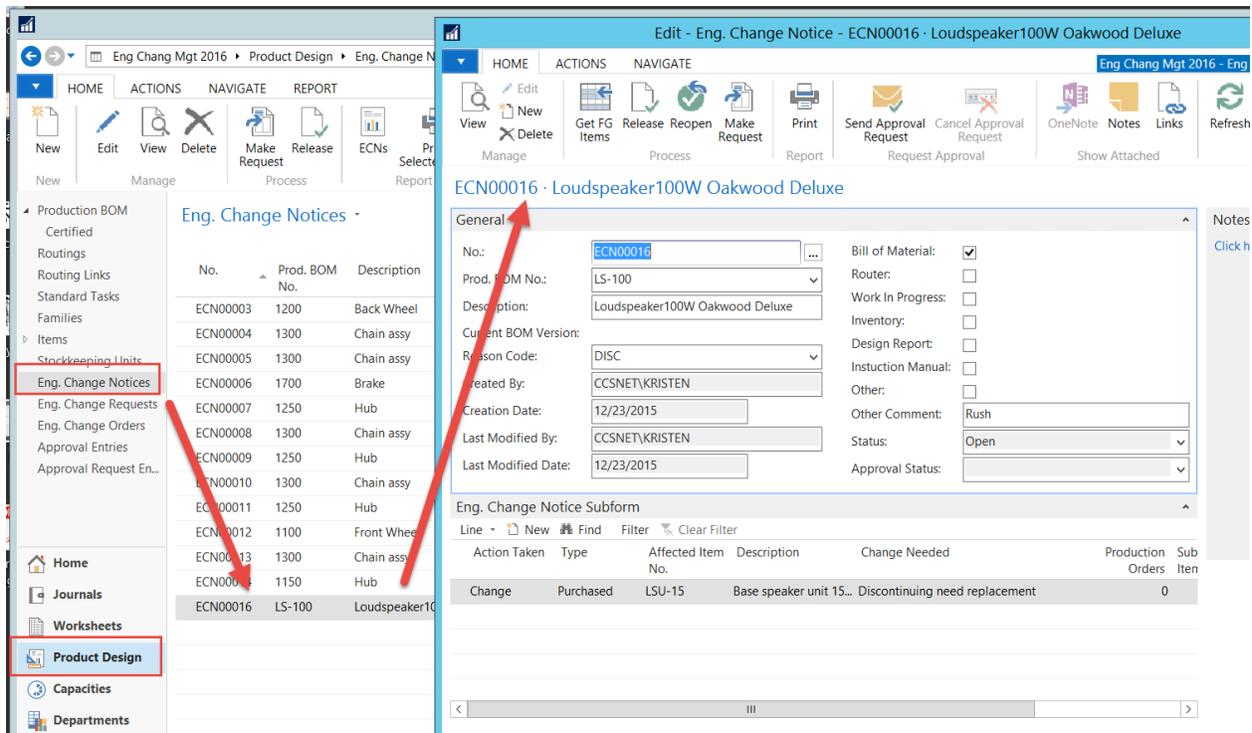
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Application Description

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.
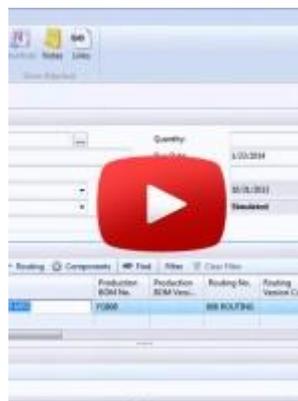
Login to View ECM Training Video Here:

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.

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.

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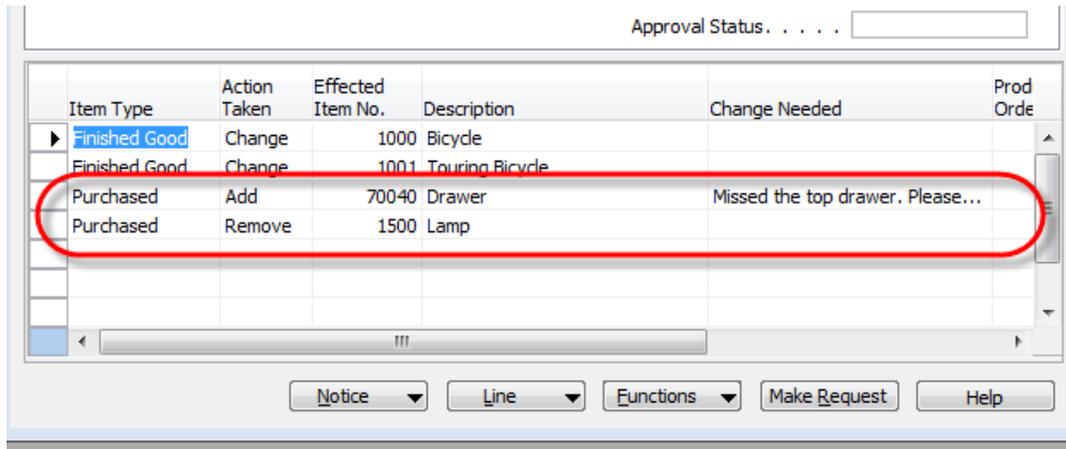
You are basically making recommendation as to "Add", "Remove", or "Change" items on the current BOM Version. (IE: Version #11)

ECM fully supports "Line Comments" to give you lots of room to document the reason or what you have noticed on the target BOM.
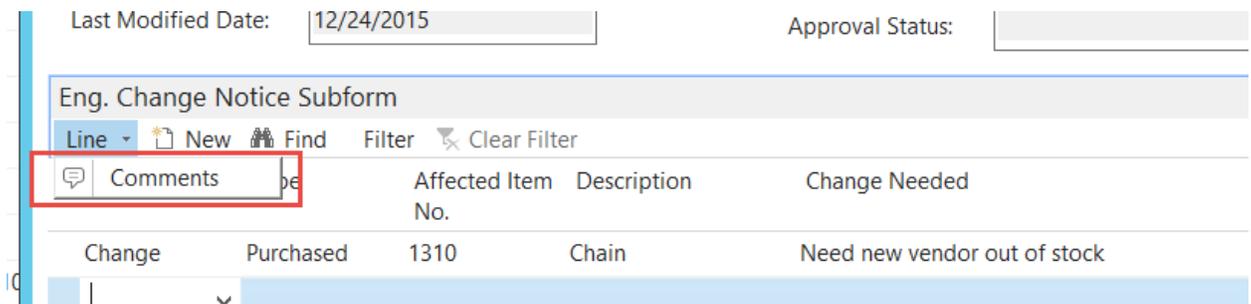
Comments are also available on the Document Header.
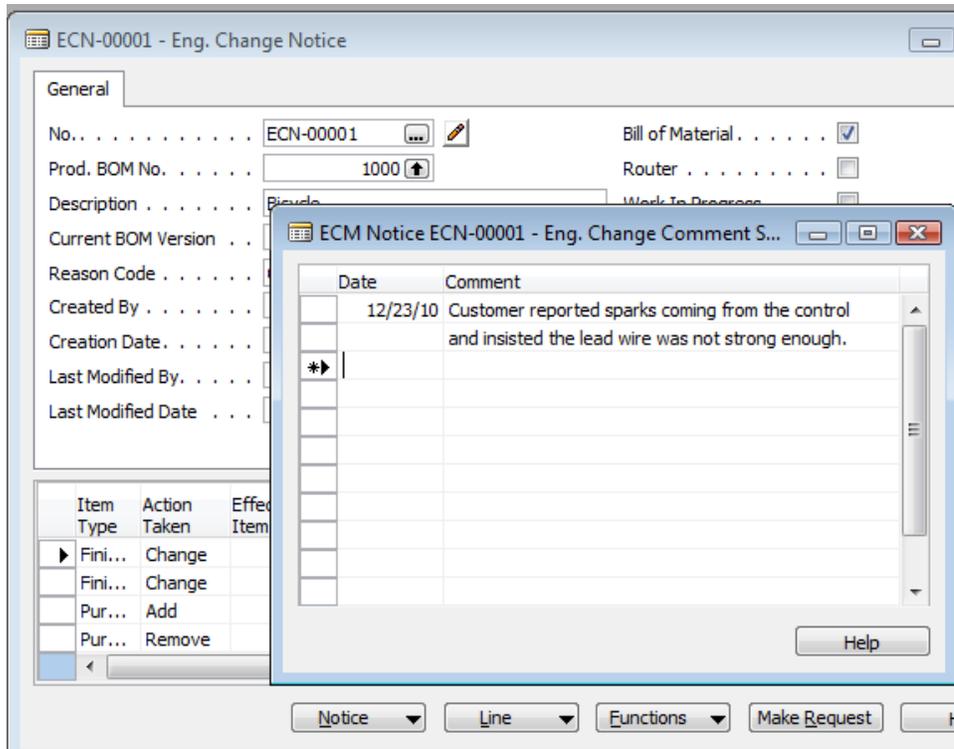
You can gain quick access to the Master BOM and BOM Version from "Notice".
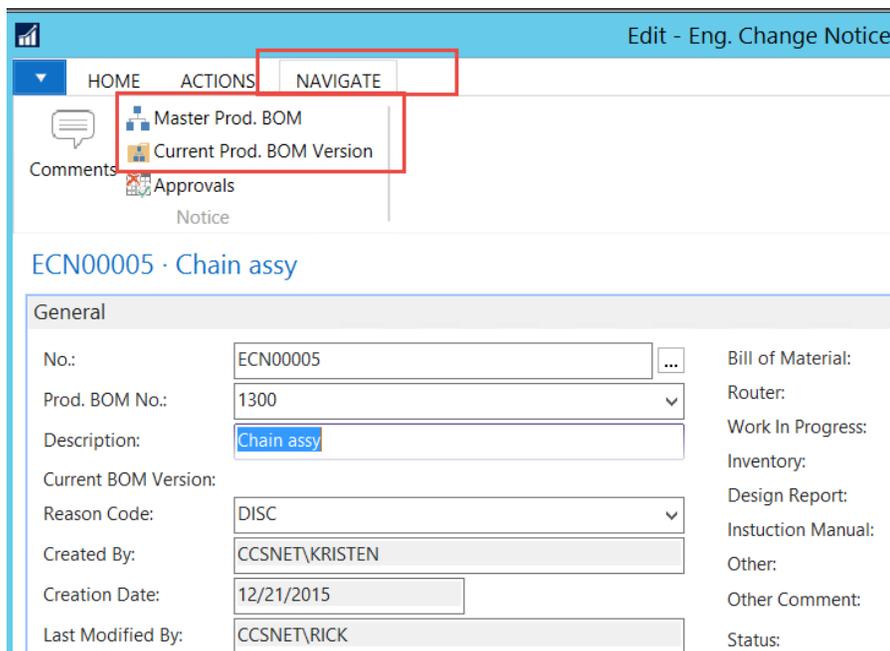
The standard NAV Document Approval system is used for approvals of Notices, Requests, and Change Orders. (See ECM Approval Workflow)
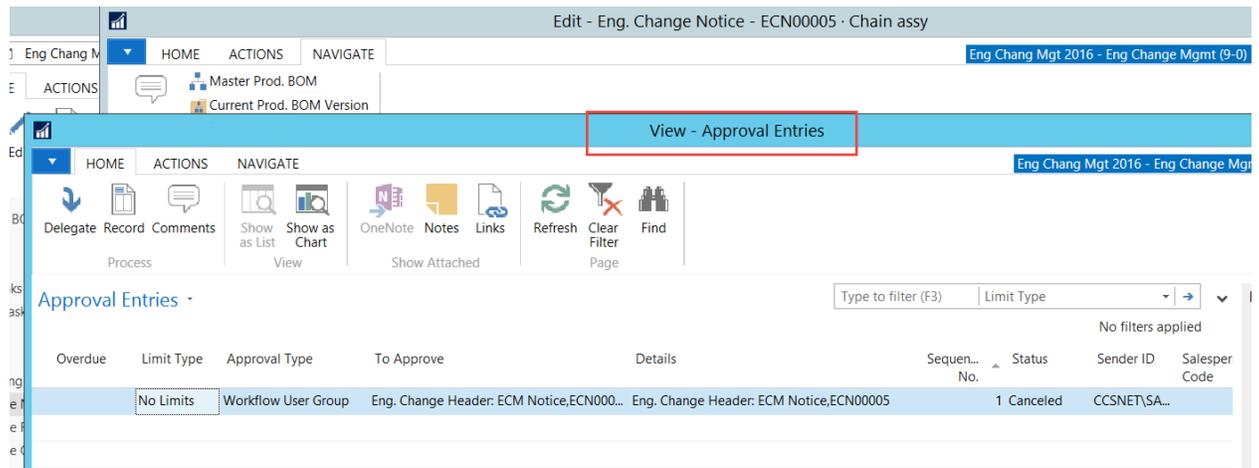
The Document Approval can be skipped, if you do not want to activate the approval workflow, just "Release" the document.

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.
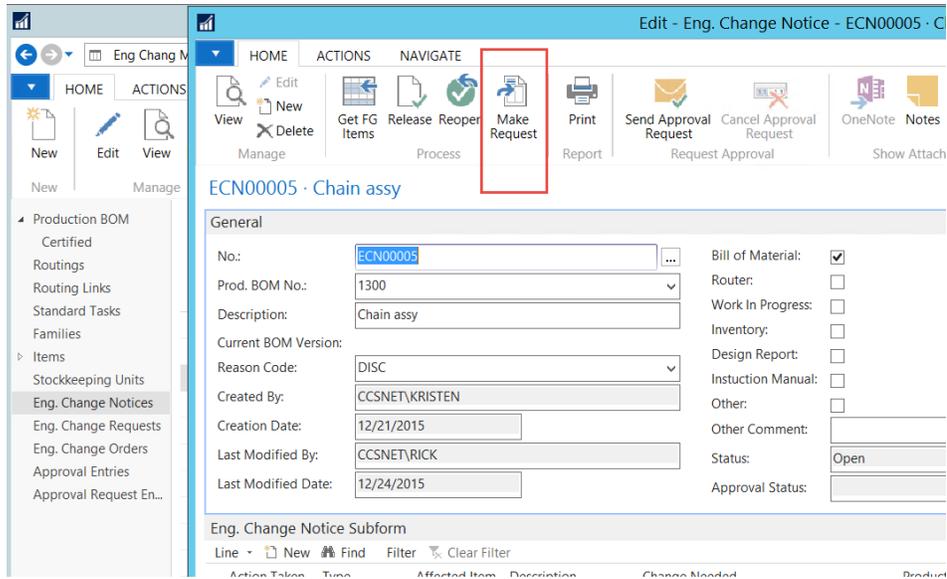
Upon "Make Request":

1. Copy of original is placed in History.
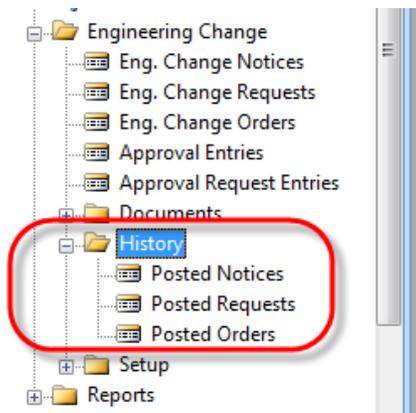
2. "Engineering Change Request" is created.
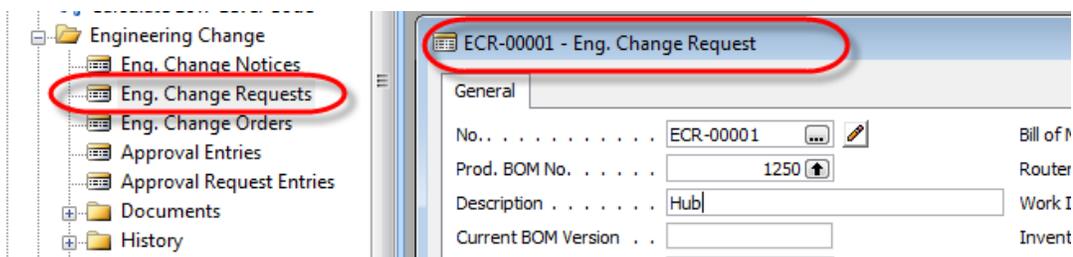
The Proposed BOM Version – Very Important.

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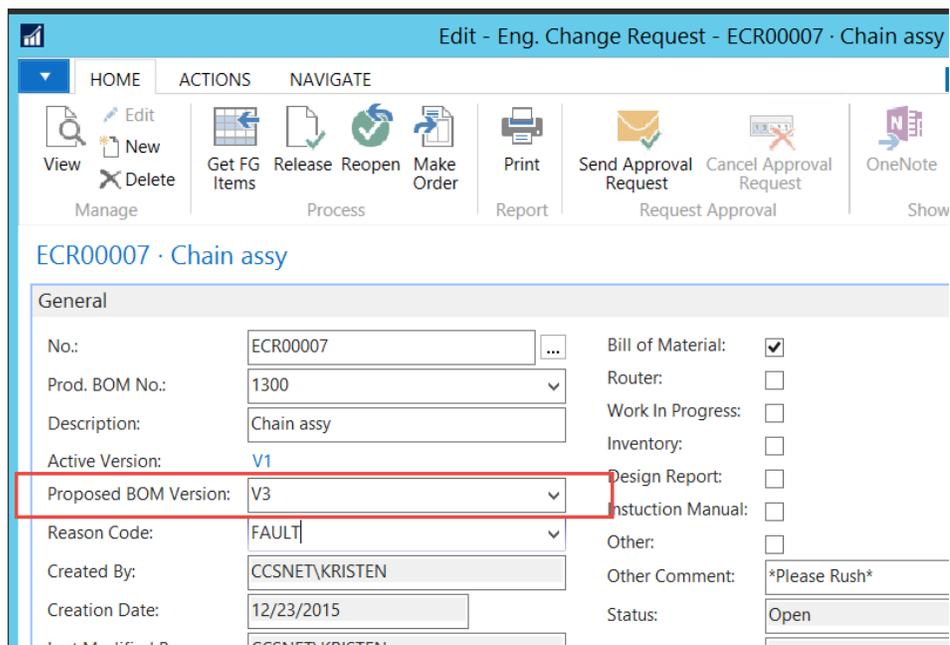
Note: The Proposed BOM Version has NOT been approved or certified until the "Approvers" say it is ok to make this the new active version.

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".

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 Order

◄◄ ◄ 1 of 1 ► ►◄ ⊗ 100% ▼   Find | Next

cronus

Engineering Change Order   No . ECO00006

Rush Please

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Page:	1
Production BOM No.	1300
Description	Chain assy
Current BOM Version	V1

Date Created	Created By:	Reason for Change	Status
12/23/2015	CCSNET\KRISTEN	FAULT	Open

Item Type	Action Taken	Effected Item No. Substitue Item No.	Description Substitute Descritpion	Change Needed
Purchased	Change	1310	Chain	Replace defective chain

Web Site: Phone: 0666-666-6666   Fax: 0666-666-6660

Impact of Change: **Due Date**   **Approvers**

Bill of Material	Yes
Router	No
Work in Progress	No
Inventory	No
Design Report	No
Instruction Manual	No
Other	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.
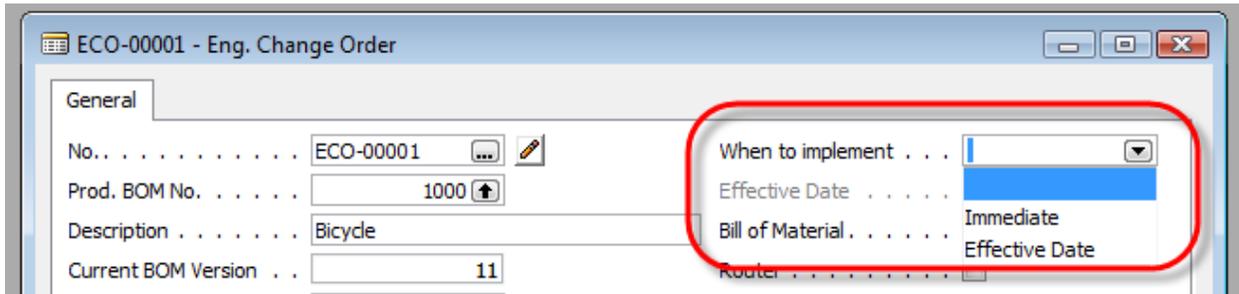
2. **The NAV 2016+ Version now uses the new "Workflow Feature" for Document Approval.**

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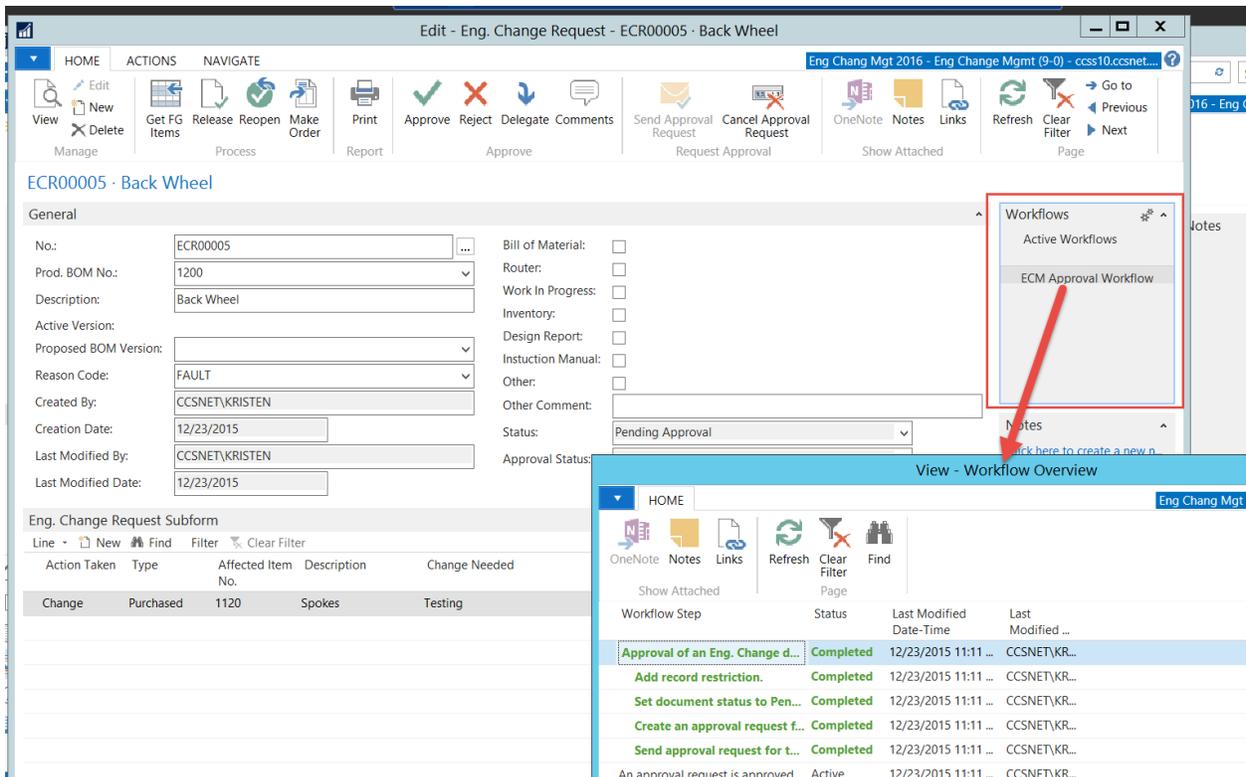
ECM Approval Workflow

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

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

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)

4. **Set Up SMTP E-Mail** [Optional]   Dept>Admn>IT Admn>Services>SMTP Mail Setup
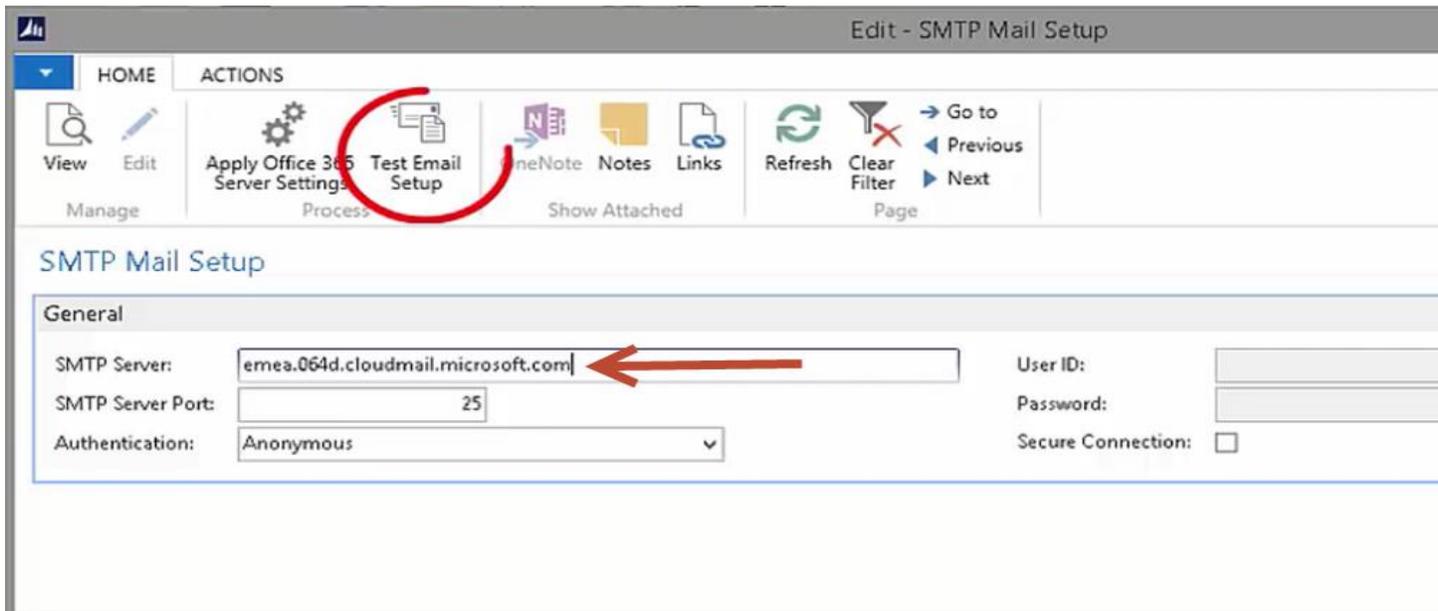
5. **Set Up Notification Method**   Admn>Aplctn Setup>Notifications>Notification Templates
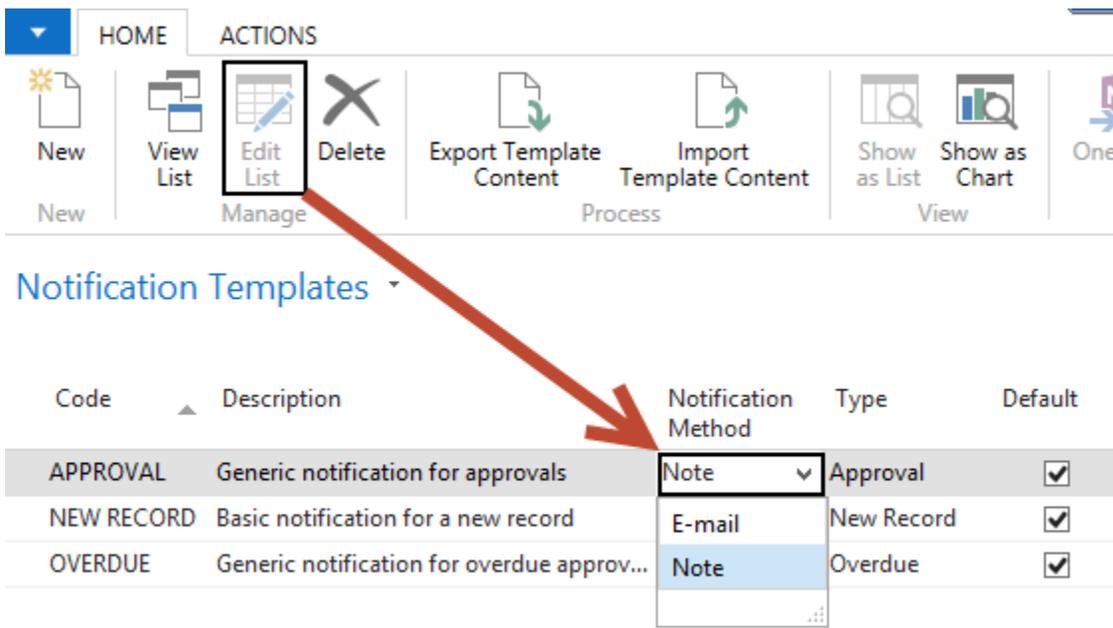
6. **Set up Notification Schedule**   Admn>Aplctn Setup>Notifications>Notification Setup

7. **Import ECM Approval Workflow File**

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

After importing, Workflow appears under Engineering Change Management category
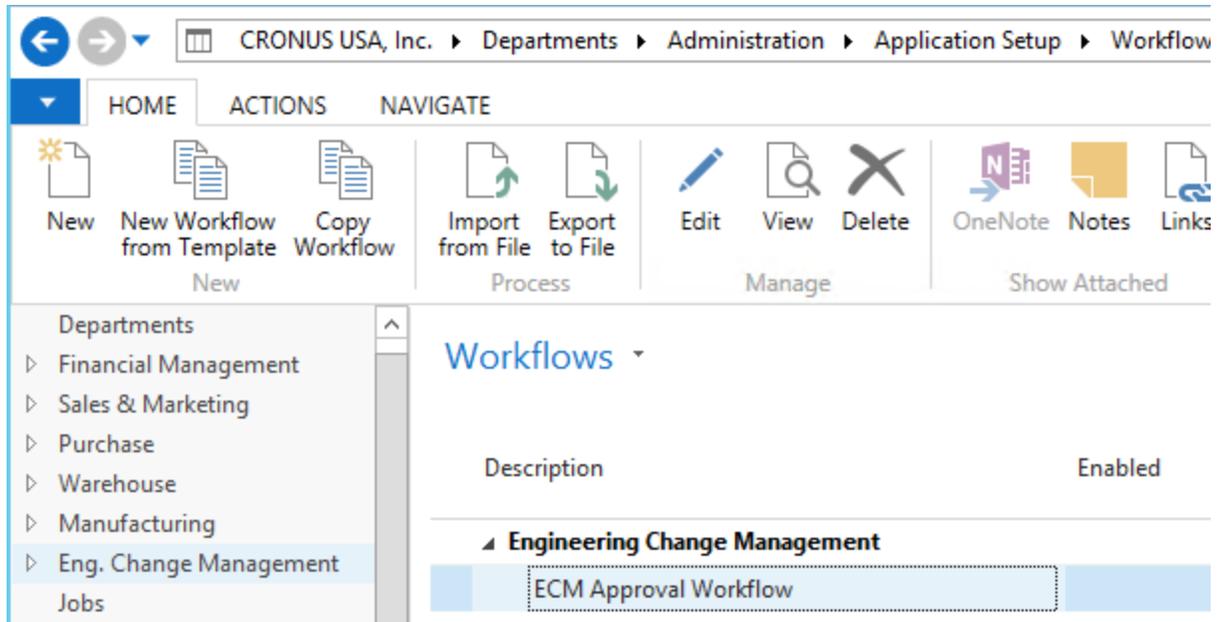
8. **Verify** that ECM Setup created the ECM Header line in the **Workflow Table Relations**

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

9.   **Verify Approver Type** under Response Options

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

-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)

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

4. **Select Approval Group**

[**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)

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

   Departments>Administration>Application Setup>Workflows

11. **Enable workflow**   Dept>Admn>Aplctn Setup>Workflows

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

    Press "New Workflow from Template">Administration>Overdue Approval Requests…
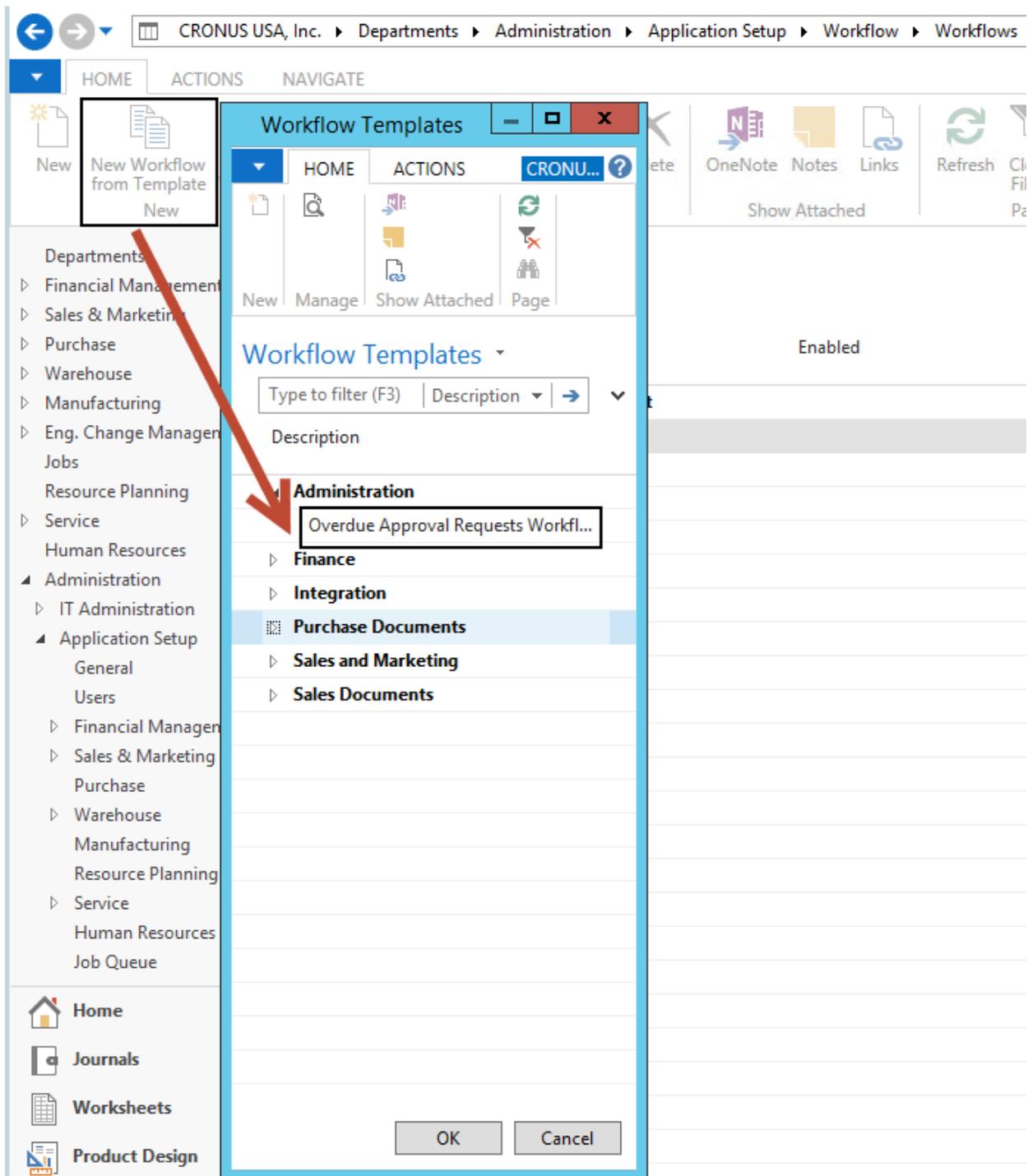
13. **Enable "Overdue Approval Requests Workflow"**
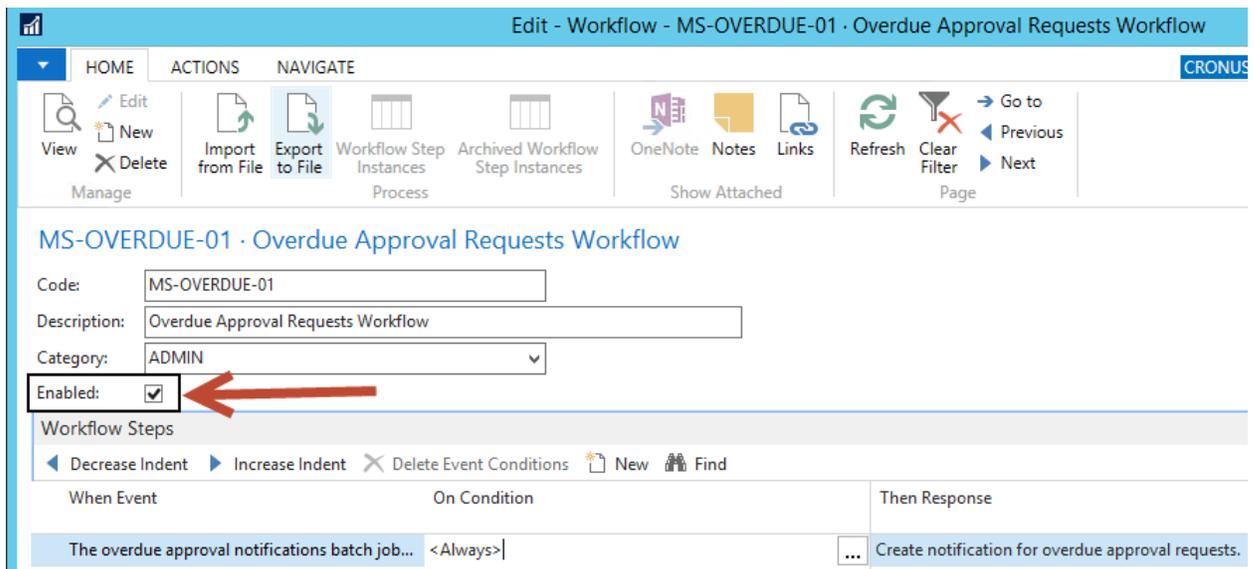
Just Added (5/1/2016) – Multi-BOM Mode!

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.)

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.

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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.