

# Change Order Auto Propagation in Product Hub Cloud



**Blog By - Snehashri Bhosale**

## Change Order Auto Propagation in Product Hub Cloud

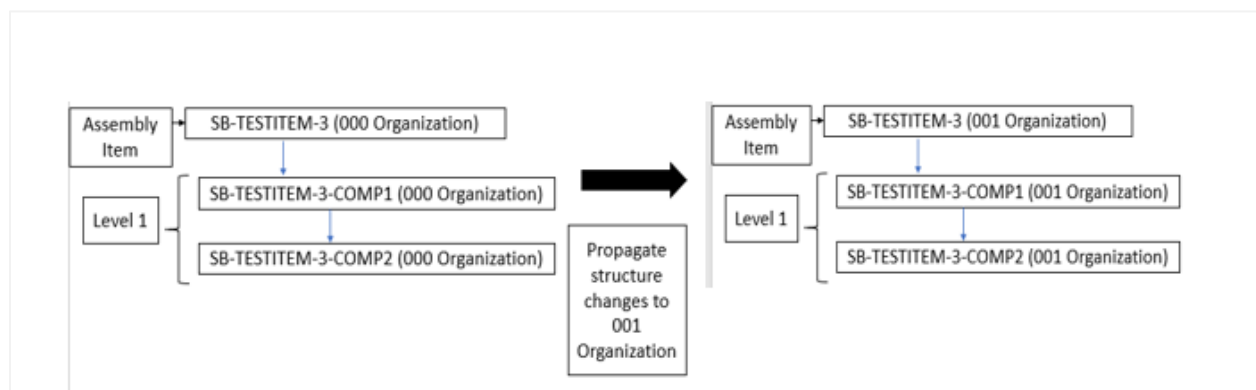
### Objective:

This blog will help to understand how to propagate the structure (BOM) changes from one organization to another organization with help of change order in Product Data Hub.

### Structure changes:

Propagation is only applicable for commercialization change orders and you can only propagate structure changes.

Let us consider SB-TESTITEM-3 is item existing in 000 organization. SB-TESTITEM-3-COMP1 and SB-TESTITEM-3-COMP2 are components to be added with help of change order at level 1 in structure for 000 organization. SB-TESTITEM-3 item also exists in 001 organization. So same change order can be created to copy the structure with level 1 components from 000 to 001 organization. User needs to make sure that component items also exists in 001 organization.



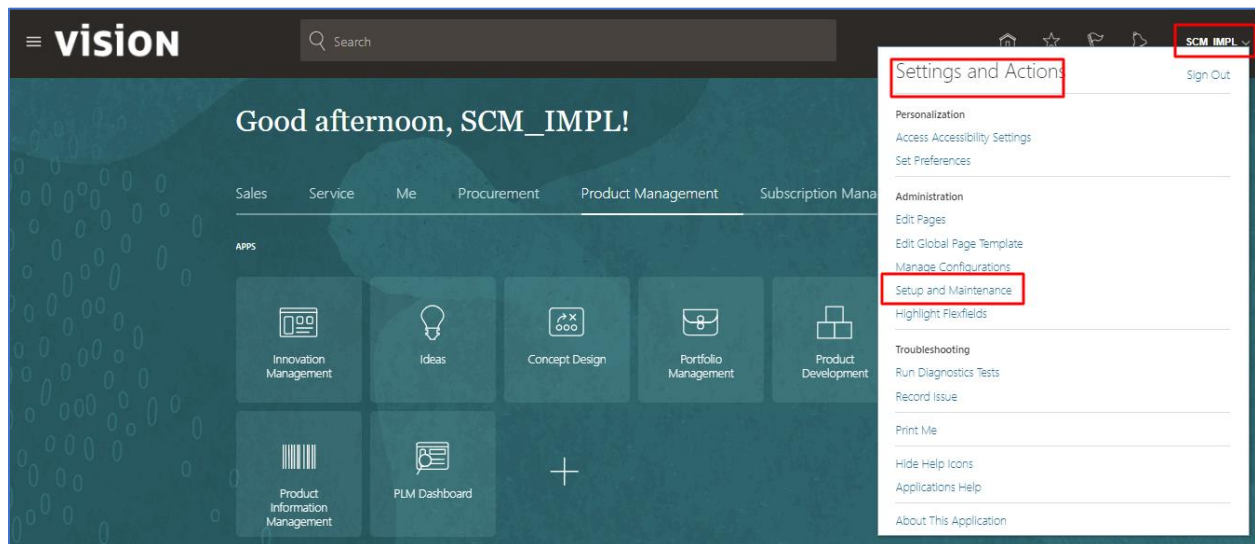
### Business Scenario:

Now suppose user wants to implement item structure changes in multiple organizations by propagating change orders to other organizations. User can achieve this with help of propagation rules thus eliminating need to create change order for each organization. Thus it saves time to create same structure in another organization and also creating change order.

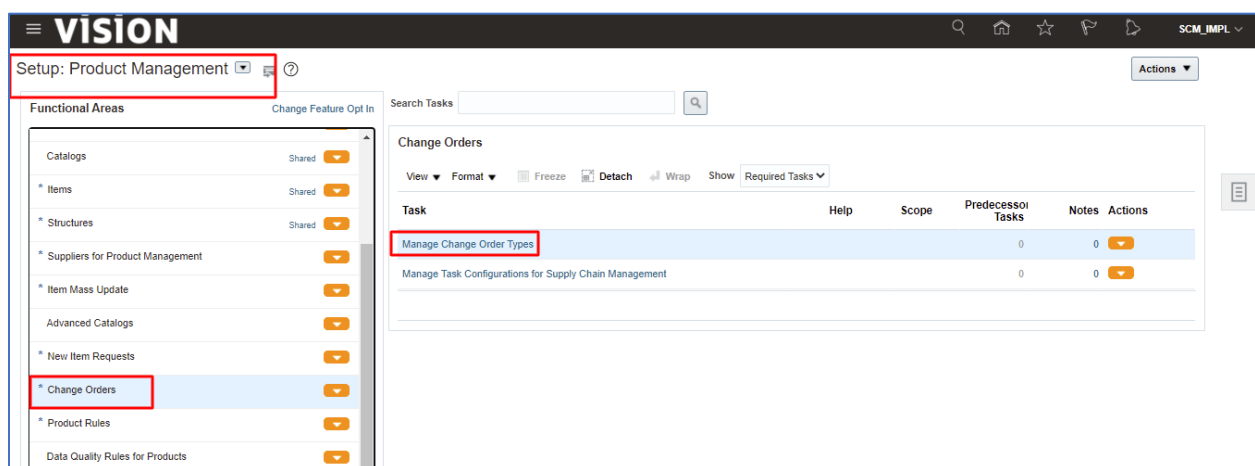
## Setup and Process Flow:

Let us define the change order with propagation rules for change order type.

- 1) On the home page click on the user name dropdown for Settings and Actions menu, then click on Setup and Maintenance link.



- 2) Under the Setup dropdown select Product Management. Select Functional area as Change Orders. On the right click on the task Manage Change Order Types.



- Highlight the row for Commercialization CO- No Approval change order type name available in system as predefined change order type and click on Duplicate icon.

**Manage Change Order Types** ? Done

**Search** Saved Search

Name Starts with  End Date Equals  m/d/yy h:mm a

Description Starts with  Default Assignee Equals

Created By Equals  Copied From Equals

Start Date Equals  m/d/yy h:mm a

Search Reset Save

**Search Results**

Actions View Format Freeze Detach Wrap

Name	Description	Copied From	Created By
BOM Propagation - US Orgs	BOM Propagation - BOM Changes passed down to specified US Orgs. ....	Commercialization CO - No Approval	KAREN CURTIS
Change Order without Revision C...	Change Order without Revision Control, support restricted set of modifi...	Change Order without Revision Control	SEED_DATA_FROM_APPLICATION
Change Request	A formal request or proposal for alteration of the affected object	Change Request	SEED_DATA_FROM_APPLICATION
<b>Commercialization CO - No Approval</b>	Commercialization Change Order, supports full featured changes in "Pr...	Commercialization CO - No Approval	<b>SEED_DATA_FROM_APPLICATION</b>
Corrective Action	Corrective Action , supports addressing any quality issues.	Corrective Action	SEED_DATA_FROM_APPLICATION

- Enter the Name and Internal Name for change order. Under the Policy tab select the change order number generation details.

**Create Change Order Type** ? Save Save and Close Cancel

\* Name  Change Order for Propagation

\* Internal Name  Change\_Order\_for\_Propagation

Description  Copy Of Commercialization CO - No Approval

\* Start Date  1/15/21

End Date  m/d/yy

Change Category  Change Order

Copied From  Commercialization CO - No Approval

Created By  SCM\_IMPL

**Policy** Workflow Propagation Rules Creators

Number Generation Method  Sequence Generated

Prefix  COP-

\* Starting Number  1,001 Example format: #,##0,###

\* Increment  1

Suffix

Item Effective Date ☐ Days after change order creation c

Number of Days  1

☒ Effective immediately

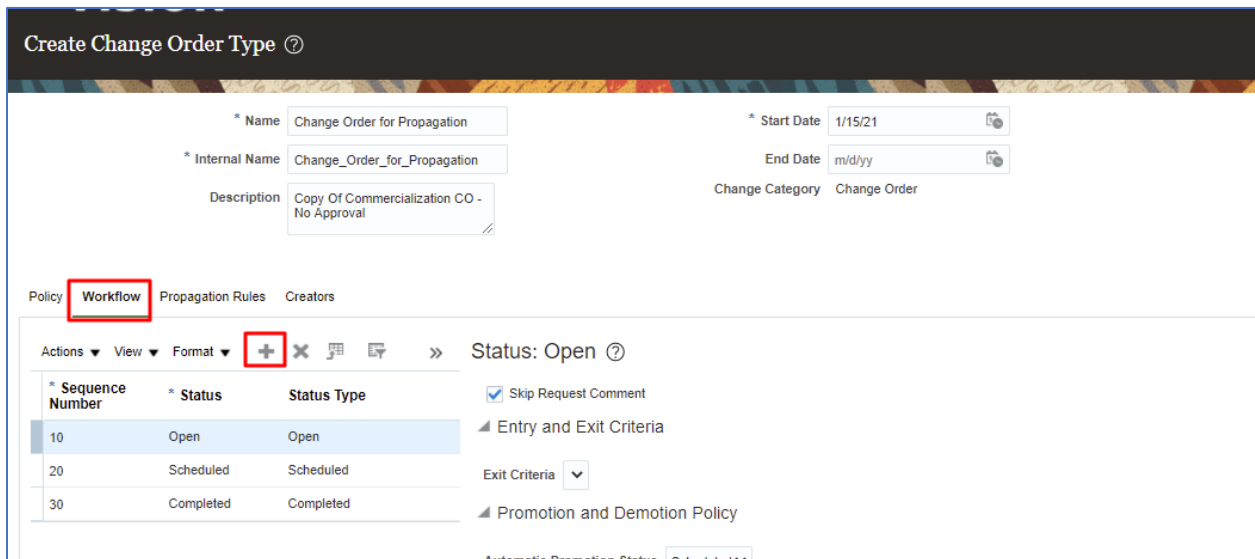
Autocomplete on Cancel ☐

Priority  High

Assignee Role

Default Assignee

5) Click on the Workflow tab and click on + icon to add row for Approval Status



**Create Change Order Type** ⓘ

\* Name: Change Order for Propagation      \* Start Date: 1/15/21

\* Internal Name: Change\_Order\_for\_Propagation      End Date: m/d/yy

Description: Copy Of Commercialization CO - No Approval      Change Category: Change Order

Policy: **Workflow** Propagation Rules Creators

Actions View Format **+** X [Icons] » Status: Open ⓘ

* Sequence Number	* Status	Status Type
10	Open	Open
20	Scheduled	Scheduled
30	Completed	Completed

☒ Skip Request Comment

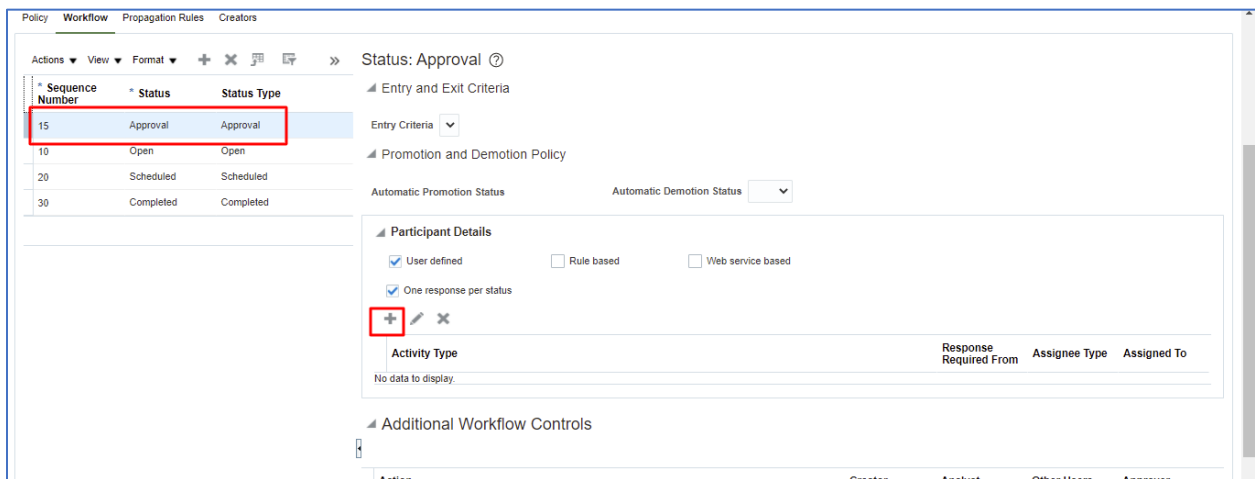
Entry and Exit Criteria

Exit Criteria: [v]

Promotion and Demotion Policy

Automatic Promotion Status: Scheduled

6) Highlight the row for Approval status and click on + icon to add participant's details to approve the change order



Policy: **Workflow** Propagation Rules Creators

Actions View Format **+** X [Icons] » Status: Approval ⓘ

* Sequence Number	* Status	Status Type
15	Approval	Approval
10	Open	Open
20	Scheduled	Scheduled
30	Completed	Completed

Entry and Exit Criteria

Entry Criteria: [v]

Promotion and Demotion Policy

Automatic Promotion Status: [v]      Automatic Demotion Status: [v]

**Participant Details**

☒ User defined      ☐ Rule based      ☐ Web service based

☒ One response per status

**+** [Icons] X

Activity Type	Response Required From	Assignee Type	Assigned To
No data to display.			

**Additional Workflow Controls**

Action: [v]      Creator: [v]      Analyst: [v]      Other Users: [v]      Approver: [v]

7) Select the values for  
 Activity type - Approval  
 Assignee Type- Person  
 Assigned To- any user name

Approval Approval

Open Open

Scheduled Scheduled

Completed Completed

Entry Criteria

Promotion and Demotion Policy

Automatic Promotion Status Automatic Demotion Status **Open**

Participant Details

☒ User defined ☐ Rule based ☐ Web service based

☒ One response per status

+ / ✕

Activity Type	Response Required From	Assignee Type	Assigned To
Approval	All	Person	SCM_IMPL

Additional Workflow Controls

8) Select Automatic Demotion status as Open

+ ✕ / ✕ / ✕ / ✕ / ✕ Status: Approval ?

Status Type

Approval

Open

Scheduled

Completed

Entry Criteria

Promotion and Demotion Policy

Automatic Promotion Status Automatic Demotion Status **Open**

Participant Details

☒ User defined ☐ Rule based ☐ Web service based

☒ One response per status

+ / ✕

Activity Type	Response Required From	Assignee Type	Assigned To
Approval	All	Person	SCM_IMPL

9) Click on Save button

**VISION**

Edit Change Order Type: Change Order for Propagation

Save Save and Close Cancel

Last Saved: 1/15/21 4:44 AM

\* Name Change Order for Propagation \* Start Date 1/15/21

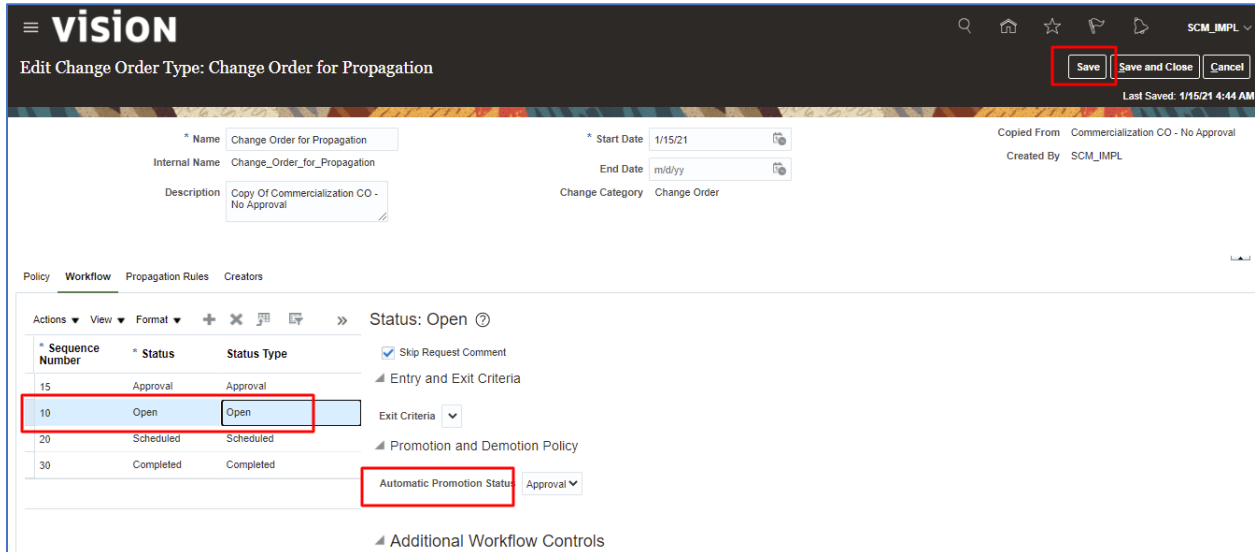
Internal Name Change\_Order\_for\_Propagation End Date m/d/yy

Description Copy Of Commercialization CO - Change Category Change Order

Copied From Commercialization CO - No Approval

Created By SCM\_IMPL

10) Highlight the row for Open status. Select Automatic Promotion Status as Approval from the dropdown and click on Save button.



**vision**

Edit Change Order Type: Change Order for Propagation

Save Save and Close Cancel

Last Saved: 1/15/21 4:44 AM

\* Name Change Order for Propagation \* Start Date 1/15/21

Internal Name Change\_Order\_for\_Propagation End Date m/d/yyyy

Description Copy Of Commercialization CO - No Approval Change Category Change Order

Copied From Commercialization CO - No Approval

Created By SCM\_IMPL

Policy Workflow Propagation Rules Creators

Actions View Format + X Print >>

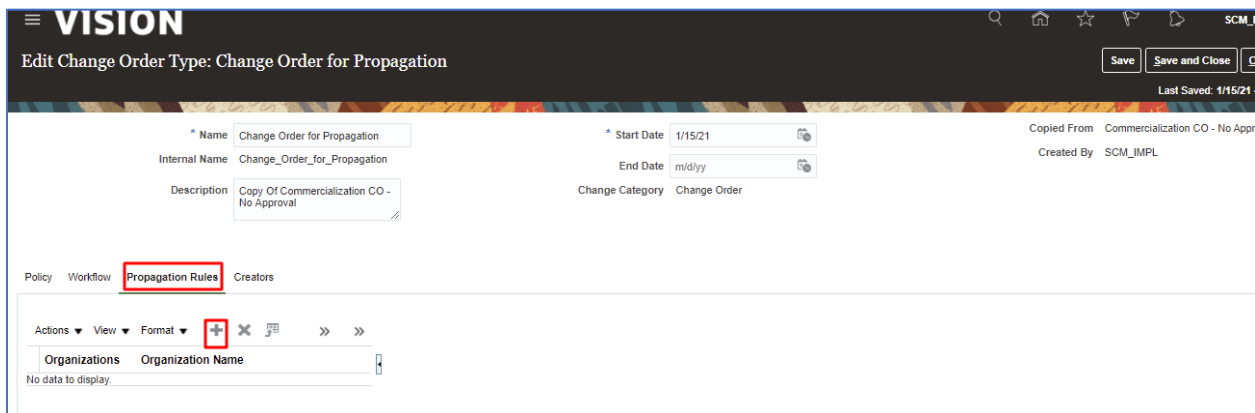
Status: Open

* Sequence Number	* Status	Status Type
15	Approval	Approval
10	Open	Open
20	Scheduled	Scheduled
30	Completed	Completed

Automatic Promotion Status Approval

Additional Workflow Controls

11) Click on Propagation Rules tab and then click on + icon to add row



**VISION**

Edit Change Order Type: Change Order for Propagation

Save Save and Close Cancel

Last Saved: 1/15/21

\* Name Change Order for Propagation \* Start Date 1/15/21

Internal Name Change\_Order\_for\_Propagation End Date m/d/yyyy

Description Copy Of Commercialization CO - No Approval Change Category Change Order

Copied From Commercialization CO - No Appr

Created By SCM\_IMPL

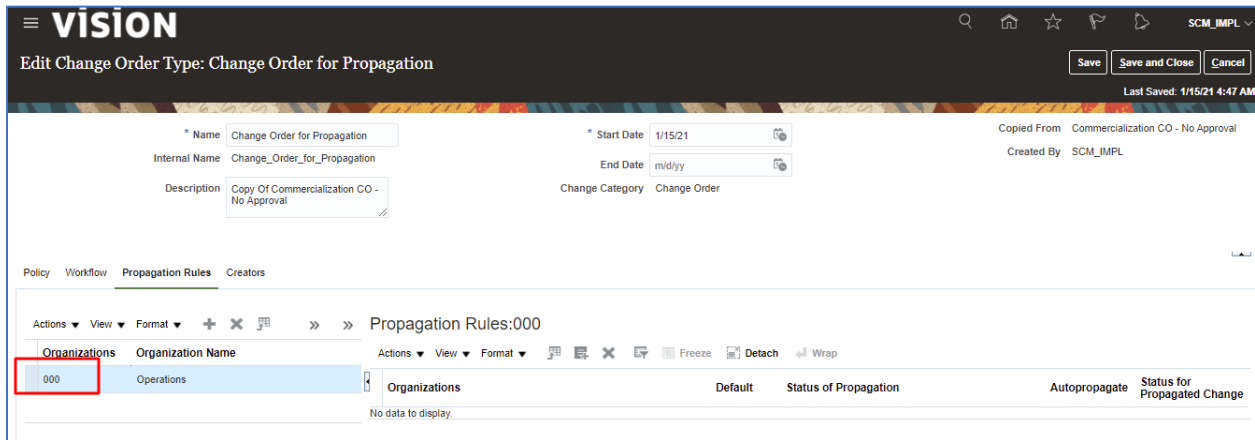
Policy Workflow Propagation Rules Creators

Actions View Format + X Print >>

Organizations Organization Name

No data to display.

12) Select the Organization from where the structure changes needs to be propagated. For eg. 000



**VISION**  
Edit Change Order Type: Change Order for Propagation

Save Save and Close Cancel  
Last Saved: 1/15/21 4:47 AM

\* Name Change Order for Propagation \* Start Date 1/15/21  
Internal Name Change\_Order\_for\_Propagation End Date m/d/yyyy  
Description Copy Of Commercialization CO - No Approval Change Category Change Order

Copied From Commercialization CO - No Approval  
Created By SCM\_IMPL

Policy Workflow **Propagation Rules** Creators

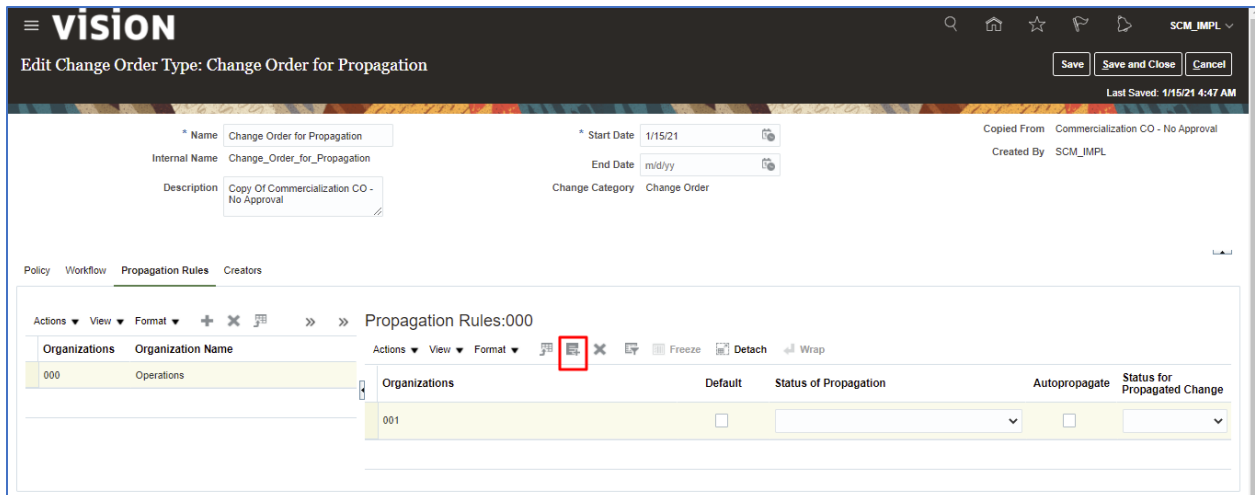
Actions View Format + X Propagation Rules:000

Organizations	Organization Name	Actions	View	Format	Freeze	Detach	Wrap
000	Operations						

Organizations Default Status of Propagation Autopropagate Status for Propagated Change

No data to display

13) Create Propagation rules for organization 000 by clicking on Select and Add icon



**VISION**  
Edit Change Order Type: Change Order for Propagation

Save Save and Close Cancel  
Last Saved: 1/15/21 4:47 AM

\* Name Change Order for Propagation \* Start Date 1/15/21  
Internal Name Change\_Order\_for\_Propagation End Date m/d/yyyy  
Description Copy Of Commercialization CO - No Approval Change Category Change Order

Copied From Commercialization CO - No Approval  
Created By SCM\_IMPL

Policy Workflow **Propagation Rules** Creators

Actions View Format + X Propagation Rules:000

Organizations	Organization Name	Actions	View	Format	Freeze	Detach	Wrap
000	Operations						
001							

Organizations Default Status of Propagation Autopropagate Status for Propagated Change

14) Highlight the row for organization 001 and enter the details below

Check the **Default** flag to set the rule as default for structure changes propagation

**Status of Propagation** as Approval i.e. when change order for organization 000 is in Approval status change order for organization 001 needs to be created

**Status for Propagated Change** as Approval i.e when change order is created for organization 001 it should be in Approval status.



vision

SCM\_IMPL

Search

Home

Star

Flag

Share

Save

Save and Close

Cancel

Last Saved: 1/15/21 4:47 AM

\* Name

Change Order for Propagation

\* Start Date

1/15/21

Copied From

Commercialization CO - No Approval

Internal Name

Change\_Order\_for\_Propagation

End Date

m/d/yy

Created By

SCM\_IMPL

Description

Copy Of Commercialization CO - No Approval

Change Category

Change Order

Policy

Workflow

Propagation Rules

Creators

Actions

View

Format

Propagations Rules:000

Organizations

Organization Name

000

Operations

Actions

View

Format

Freeze

Detach

Wrap

Organizations

Default

Status of Propagation

Autopropagate

Status for Propagated Change

001

Approval

Approval

vision

Manage Change Order Types

SCM\_IMPL

Done

Search

Name Starts with

End Date Equals mid/yy h:mm a

Description Starts with

Default Assignee Equals

Created By Equals

Copied From Equals

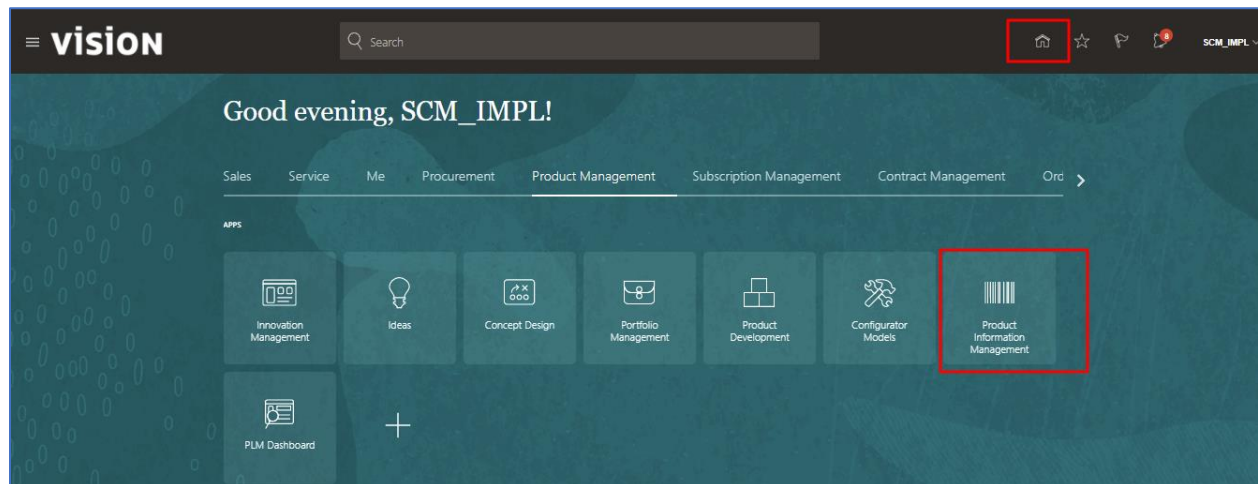
Start Date Equals mid/yy h:mm a

Saved Search

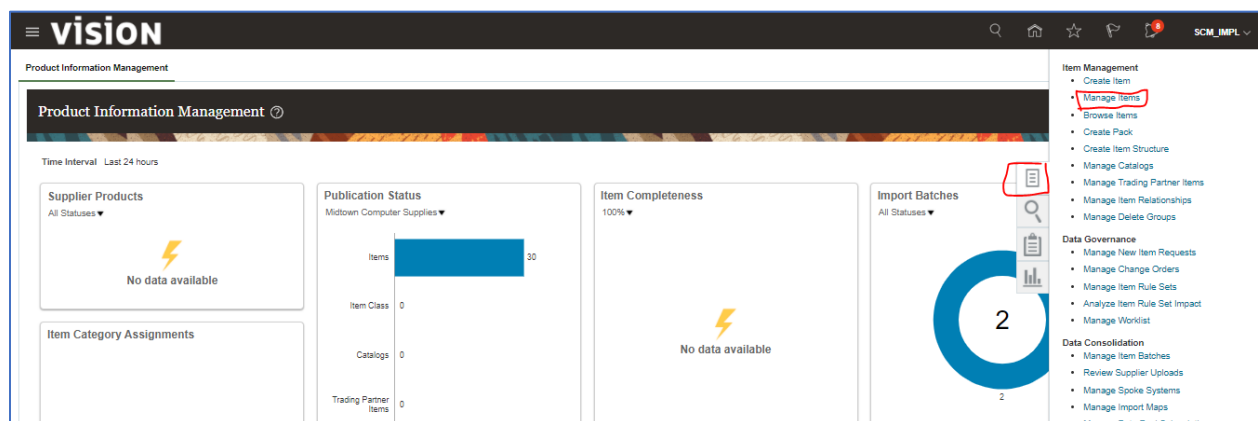
Search Reset Save...

Search Results

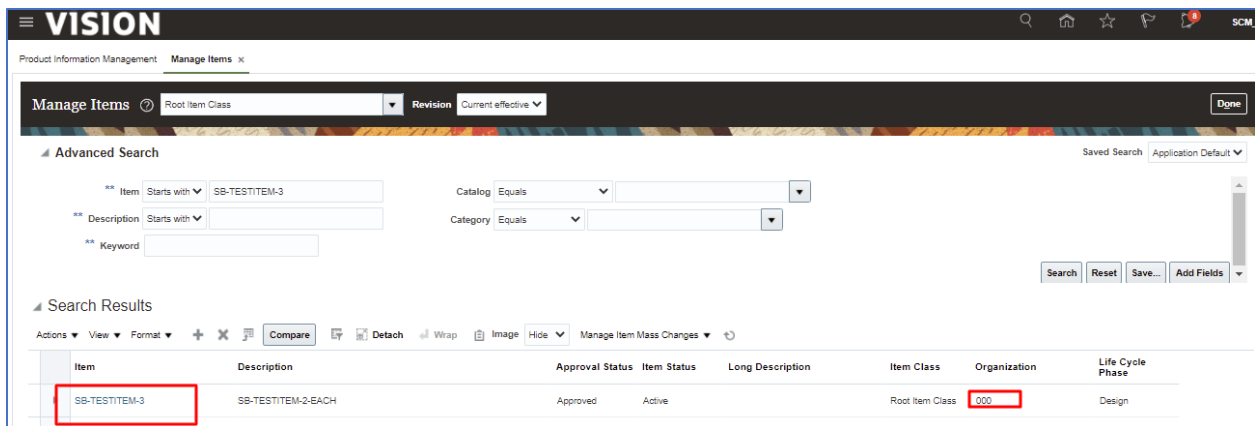
17) Navigate to home page and click on Product Information Management



18) Click on task panel and click on link for Manage Items



19) Search for the item in 000 organization and open the item in edit mode by clicking on item link in search results



**VISION**  
Product Information Management Manage Items x

Manage Items Root Item Class Revision Current effective Done

**Advanced Search**

\*\* Item Starts with SB-TESTITEM-3 Catalog Equals  
 \*\* Description Starts with Category Equals  
 \*\* Keyword

Search Reset Save... Add Fields

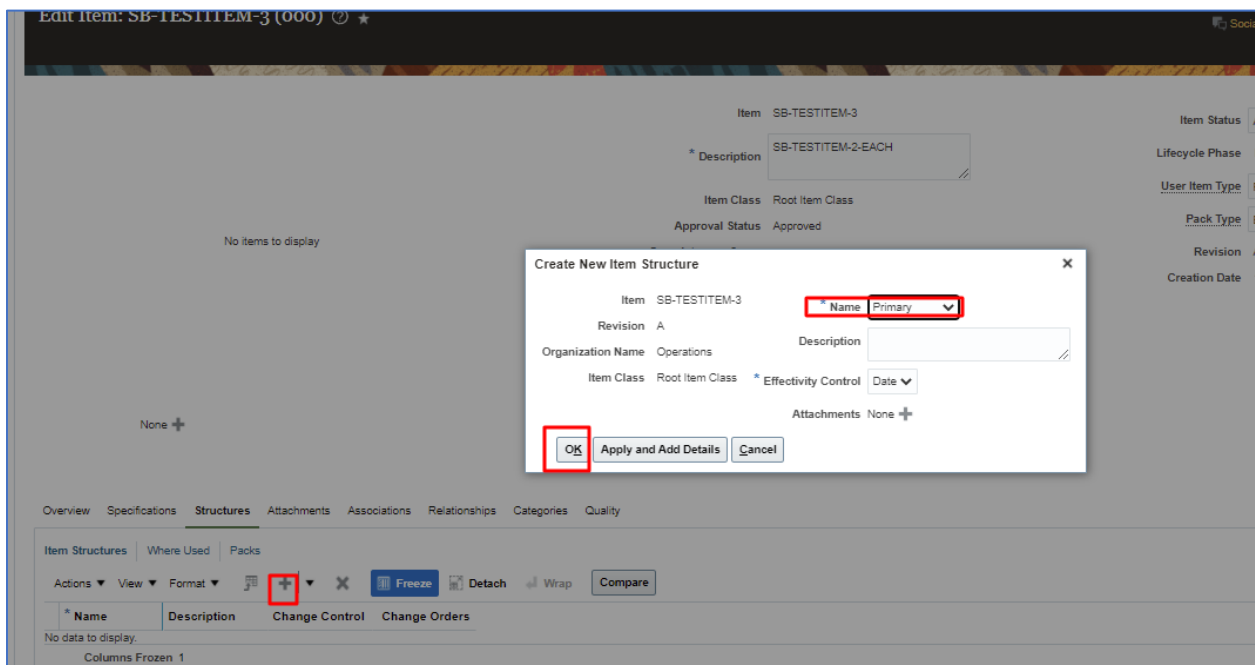
**Search Results**

Actions View Format Compare Detach Wrap Image Hide Manage Item Mass Changes

Item	Description	Approval Status	Item Status	Long Description	Item Class	Organization	Life Cycle Phase
SB-TESTITEM-3	SB-TESTITEM-2-EACH	Approved	Active		Root Item Class	000	Design

20) Click on Structures tab

21) Click on + icon to create Primary Structure with assembly item. Enter Name as Primary and click OK button.



Edit Item: SB-TESTITEM-3 (000)

Item SB-TESTITEM-3  
 \* Description SB-TESTITEM-2-EACH  
 Item Class Root Item Class  
 Approval Status Approved

No items to display

None

**Create New Item Structure**

Item SB-TESTITEM-3  
 Revision A  
 Organization Name Operations  
 Item Class Root Item Class  
 \* Effectivity Control Date  
 Attachments None

OK Apply and Add Details Cancel

Overview Specifications Structures Attachments Associations Relationships Categories Quality

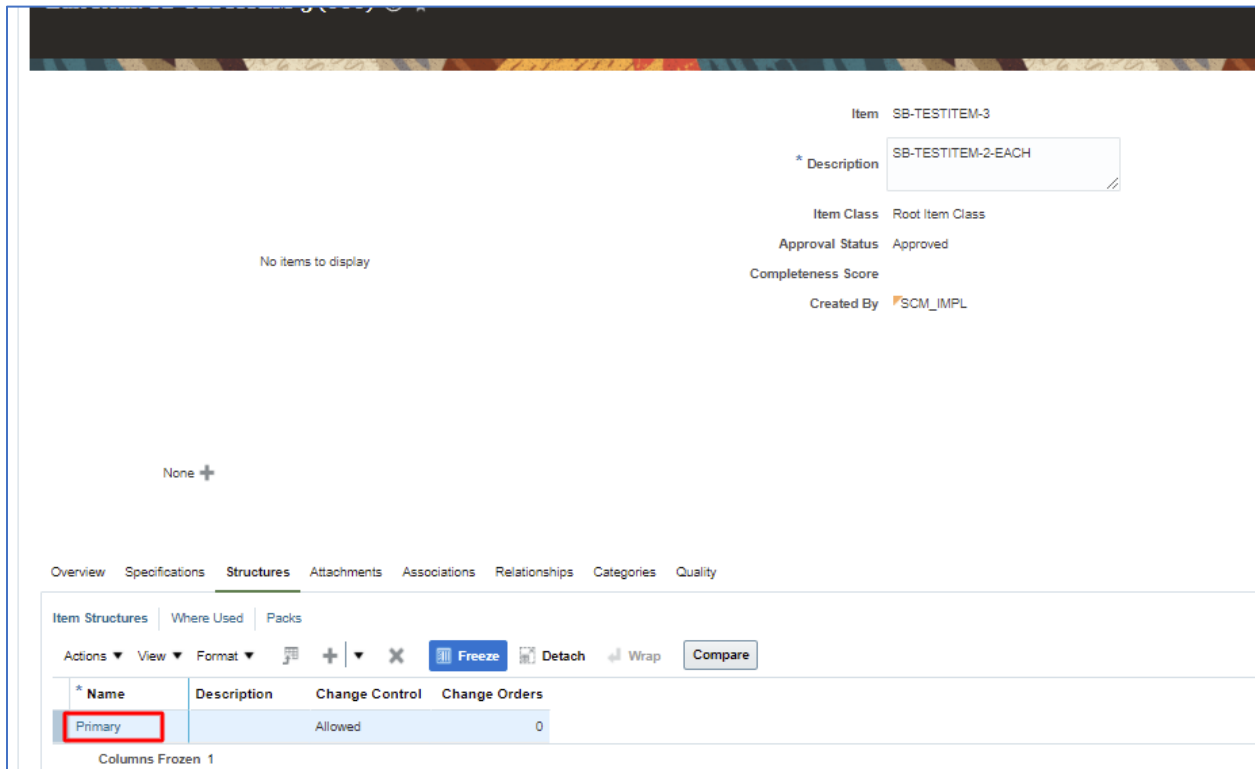
Item Structures Where Used Packs

Actions View Format + Freeze Detach Wrap Compare

* Name	Description	Change Control	Change Orders
No data to display.			

Columns Frozen 1

22) Click on Primary link



Item: SB-TESTITEM-3

\* Description: SB-TESTITEM-2-EACH

Item Class: Root Item Class

Approval Status: Approved

Completeness Score:

Created By: SCM\_IMPL

No items to display

None +

Overview Specifications **Structures** Attachments Associations Relationships Categories Quality

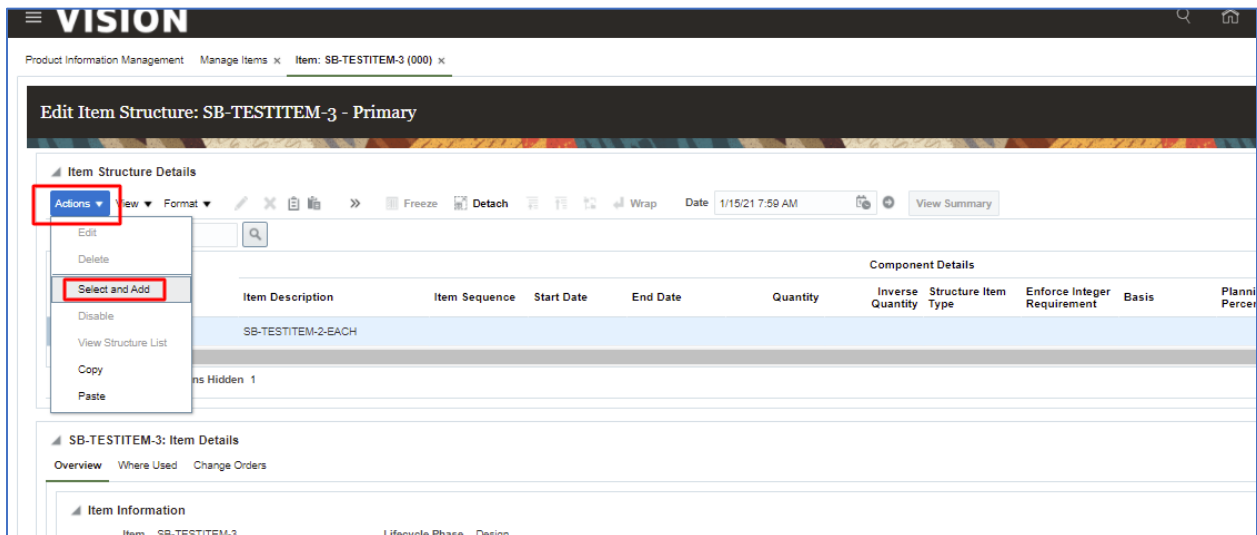
Item Structures Where Used Packs

Actions View Format + - Freeze Detach Wrap Compare

* Name	Description	Change Control	Change Orders
<b>Primary</b>		Allowed	0

Columns Frozen 1

23) Click on Action and click Select and Add from dropdown.



VISION

Product Information Management Manage Items x Item: SB-TESTITEM-3 (000) x

Edit Item Structure: SB-TESTITEM-3 - Primary

Item Structure Details

Actions View Format + - Freeze Detach Wrap Date: 1/15/21 7:59 AM View Summary

Edit Delete

**Select and Add**

Disable View Structure List Copy Paste

Item Description	Item Sequence	Start Date	End Date	Quantity	Inverse Quantity	Structure Item Type	Enforce Integer Requirement	Basis	Planned Percentage
SB-TESTITEM-2-EACH									

ns Hidden 1

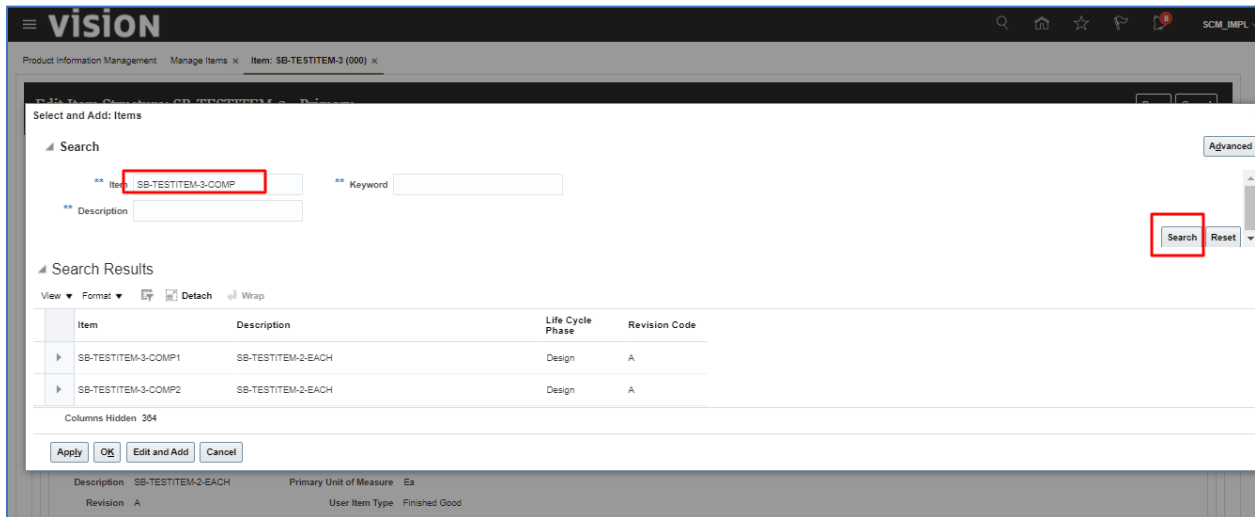
SB-TESTITEM-3: Item Details

Overview Where Used Change Orders

Item Information

Item: SB-TESTITEM-3 Lifecycle Phase: Design

24) Search for the component items by entering item details and clicking on Search button

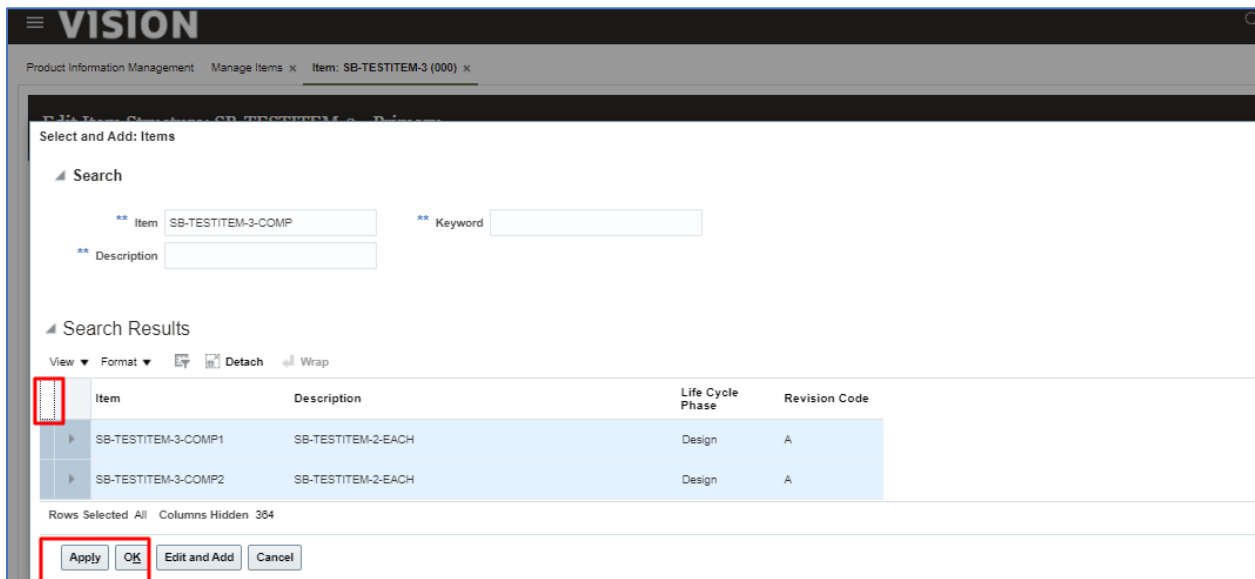


The screenshot shows the 'Select and Add: Items' dialog in the VISION software. The 'Item' field contains 'SB-TESTITEM-3-COMP'. The 'Search' button is highlighted with a red box. Below the search fields, the 'Search Results' section displays a table with two rows of results.

Item	Description	Life Cycle Phase	Revision Code
SB-TESTITEM-3-COMP1	SB-TESTITEM-2-EACH	Design	A
SB-TESTITEM-3-COMP2	SB-TESTITEM-2-EACH	Design	A

Buttons at the bottom include 'Apply', 'OK', 'Edit and Add', and 'Cancel'.

25) Click on the section highlighted and then click on Apply and then OK button to select multiple items from the search results section.

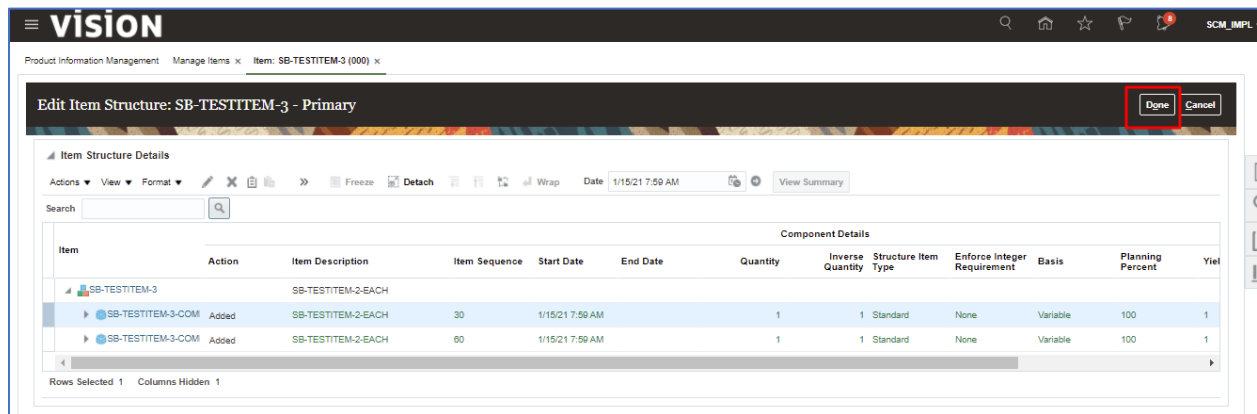


The screenshot shows the same 'Select and Add: Items' dialog. The first column of the 'Search Results' table is highlighted with a red box. The 'Apply' and 'OK' buttons at the bottom are also highlighted with a red box.

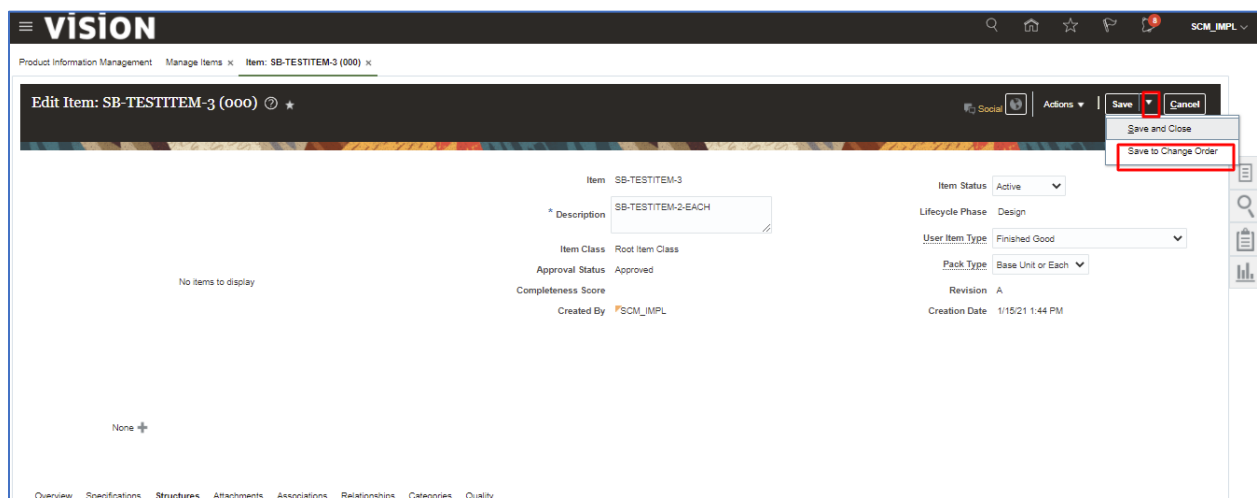
Item	Description	Life Cycle Phase	Revision Code
SB-TESTITEM-3-COMP1	SB-TESTITEM-2-EACH	Design	A
SB-TESTITEM-3-COMP2	SB-TESTITEM-2-EACH	Design	A

Buttons at the bottom include 'Apply', 'OK', 'Edit and Add', and 'Cancel'.

26) Click on Done button



27) Click on triangle next to Save button and select Save to Change Order from the dropdown



28) Select the type of change order already created and click on Next button

Item: SB-TESTITEM-3 (000) ✕

o) ? ★

Item Status: Active ▼

Lifecycle Phase: Design

User Item Type: Finished Good

Pack Type: Base Unit or Each

Revision: A

Creation Date: 1/15/21 1:44 PM

Save to Change Order: Select Change Order ✕

Organization: Operations (000)

☒ Create Change order

\* Type: Change Order for Propagati...

☐ Add to existing Change order

\* Change Order:

Back Next Save and Edit ▼ Cancel

29) Enter the Name for the change order and click on Save and Edit button

Item: SB-TESTITEM-3 (000) ✕

3 (000) ? ★

Save to Change Order: Create Change Order ✕

Type: Change Order for Propagation

Number: COP-XXXXX

\* Name: SB-TESTITEM-3

Description:

Priority: High ▼

Reason:

Propagation Organizations: 001 ▼

Need-by Date: m/d/yy

Assigned To: SCM\_IMPL

Requested By: SCM\_IMPL

Lines

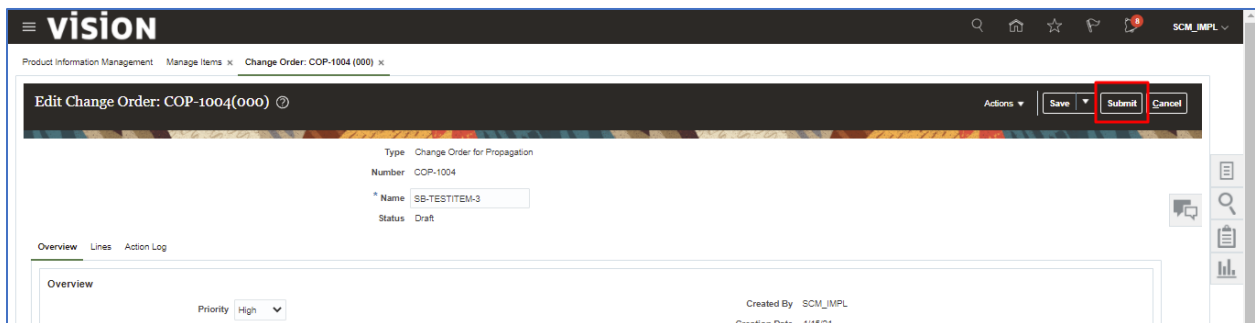
Line Number	Item	Item Description	Revision		Effective Date
			Current	New	
10	SB-TESTITEM-3	SB-TESTITEM-...	A		m/d/yy h:mm a

Back Next Save and Edit ▼ Submit Cancel

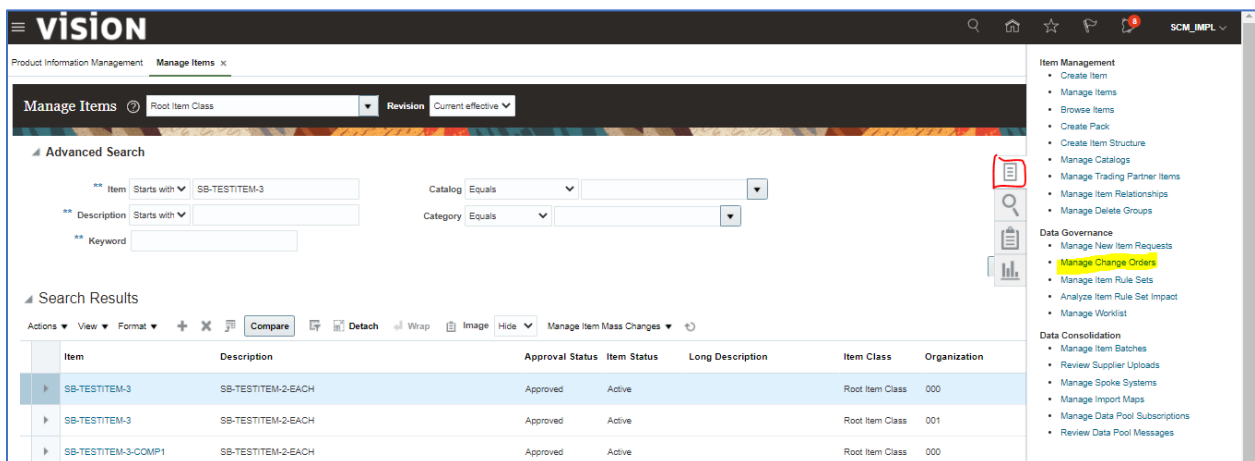
31) Drill down to Propagation Organization section and enable the organization for propagation.

32) Click on Submit button to submit the change order.

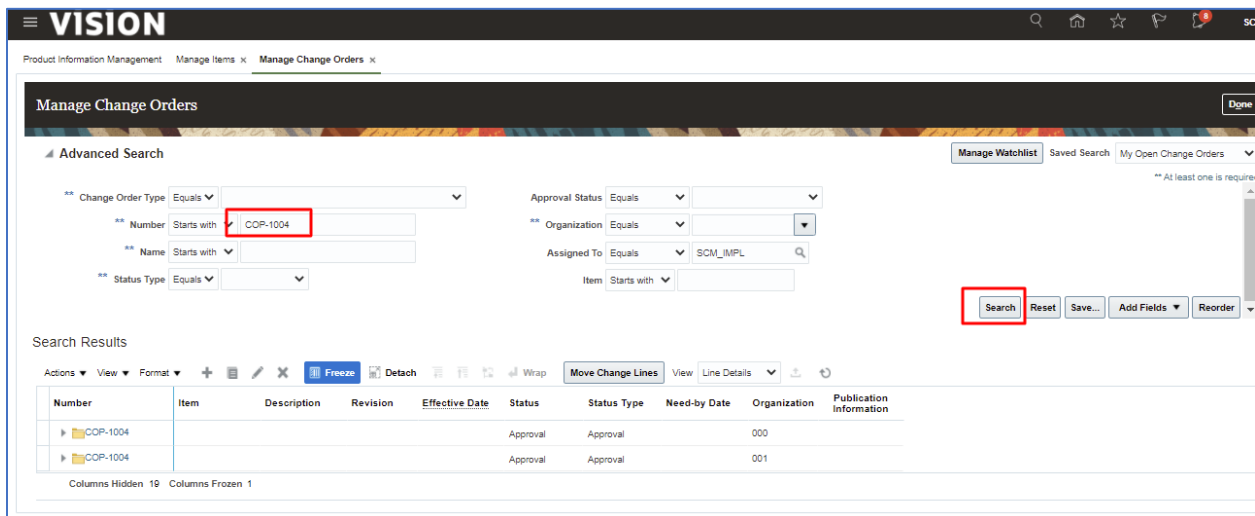




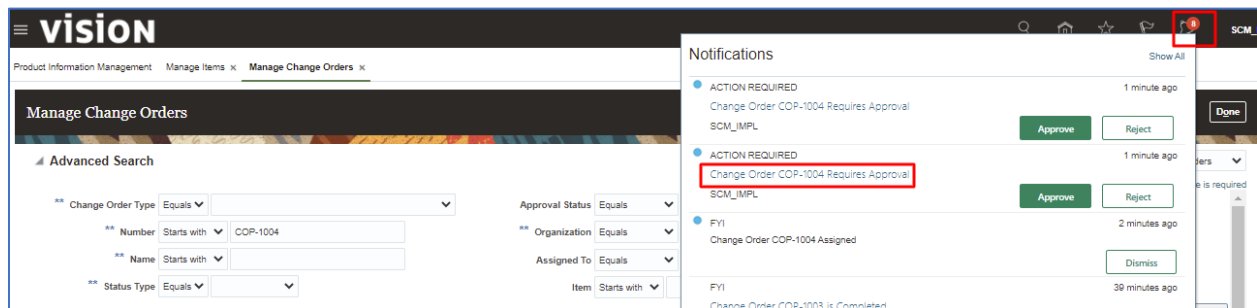
33) Click on task panel and click on Manage Change Orders page



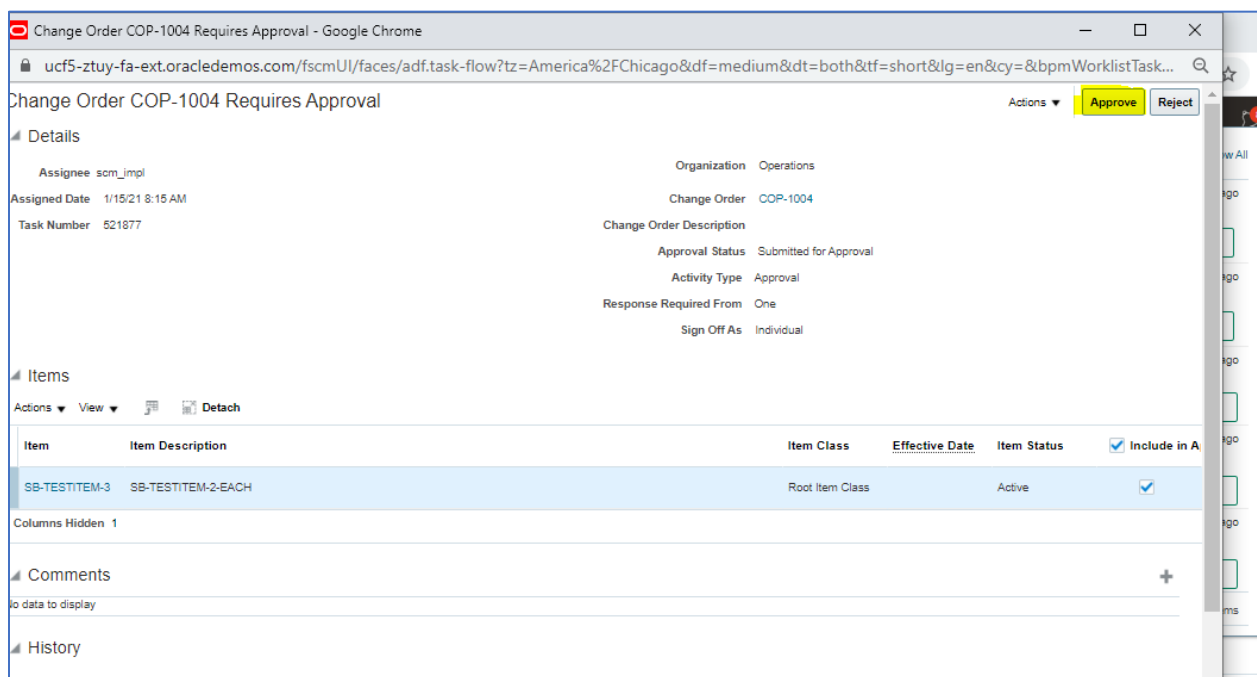
34) Search for the change order by entering change order number and clicking on Search button



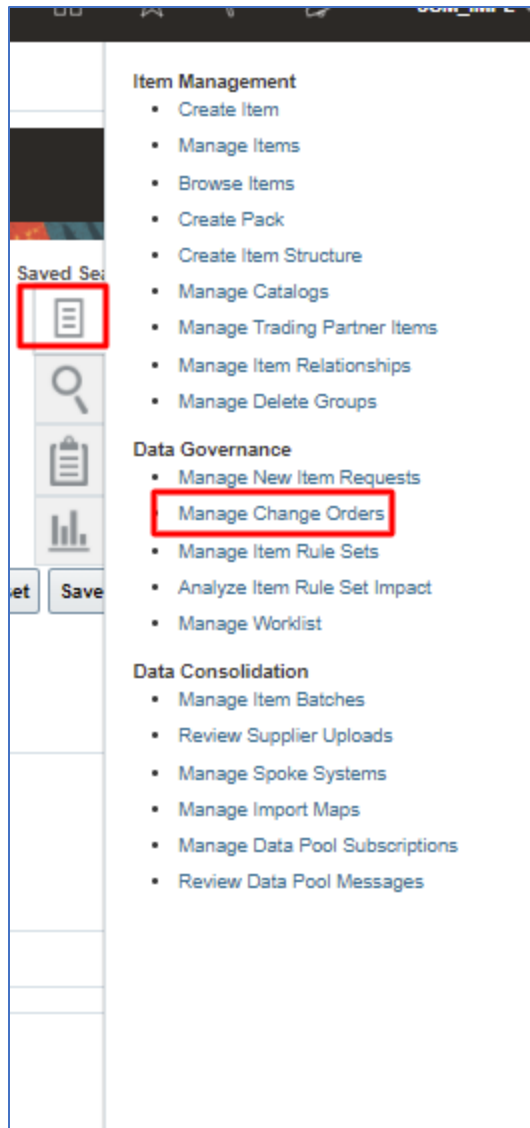
35) Click on notification bell icon and click on notification to approve change order for 000 organization.



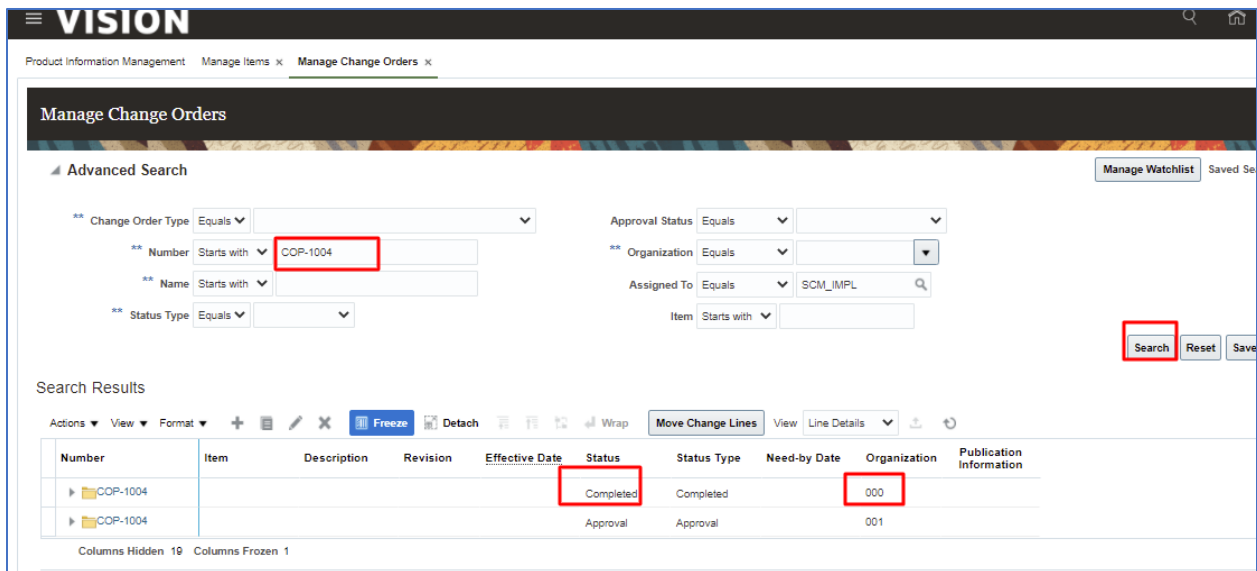
36) Click on Approve button to approve change order



37) Click on the task panel. Click on Manage Change Orders page by clicking on the link



38) Search for the change order with change order number and click on Search button.



**Manage Change Orders**

**Advanced Search**

Change Order Type: Equals [ ]

Number: Starts with [COP-1004]

Name: Starts with [ ]

Status Type: Equals [ ]

Approval Status: Equals [ ]

Organization: Equals [ ]

Assigned To: Equals [SCM\_IMPL]

Item: Starts with [ ]

**Search** **Reset** **Save**

**Search Results**

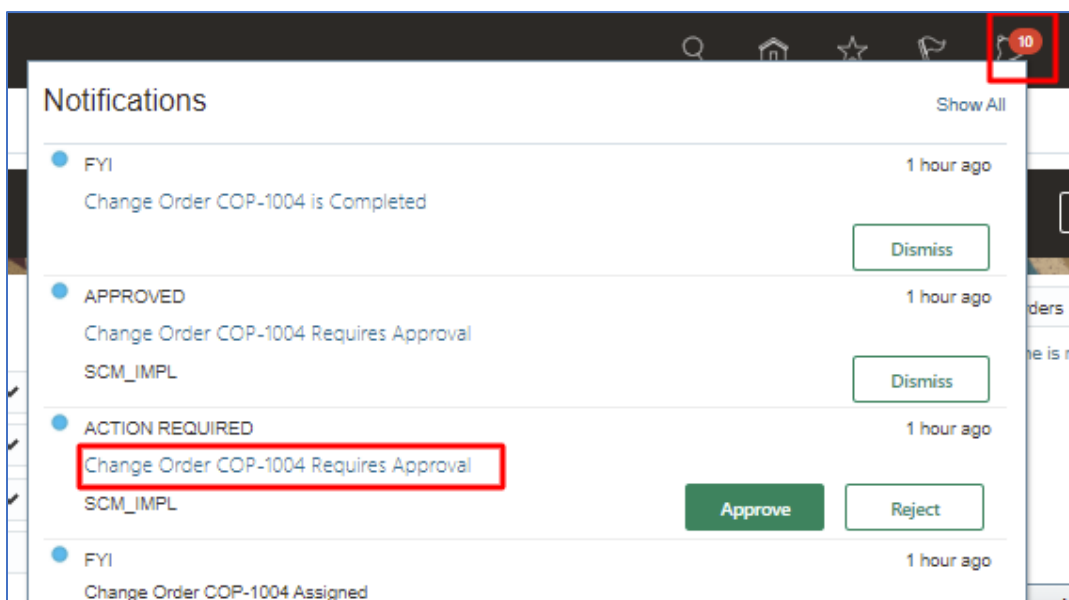
Number	Item	Description	Revision	Effective Date	Status	Status Type	Need-by Date	Organization	Publication Information
COP-1004					Completed	Completed		000	
COP-1004					Approval	Approval		001	

Columns Hidden: 19 Columns Frozen: 1

Now you can see two change orders (000 and 001 organizations) with same number where change order for 000 organization is completed and change order for 001 organization is still in Approval status.

Note: Master organization and child organization change orders on same item cannot be scheduled in parallel because there can be master controlled attributes that are propagated to child organizations and hence may result in lock errors. Therefore, effective date for lines between two change orders must be at least 30 minutes.

39) Click on the notification bell icon and change order requires approval link for 001 organization.



**Notifications**

10

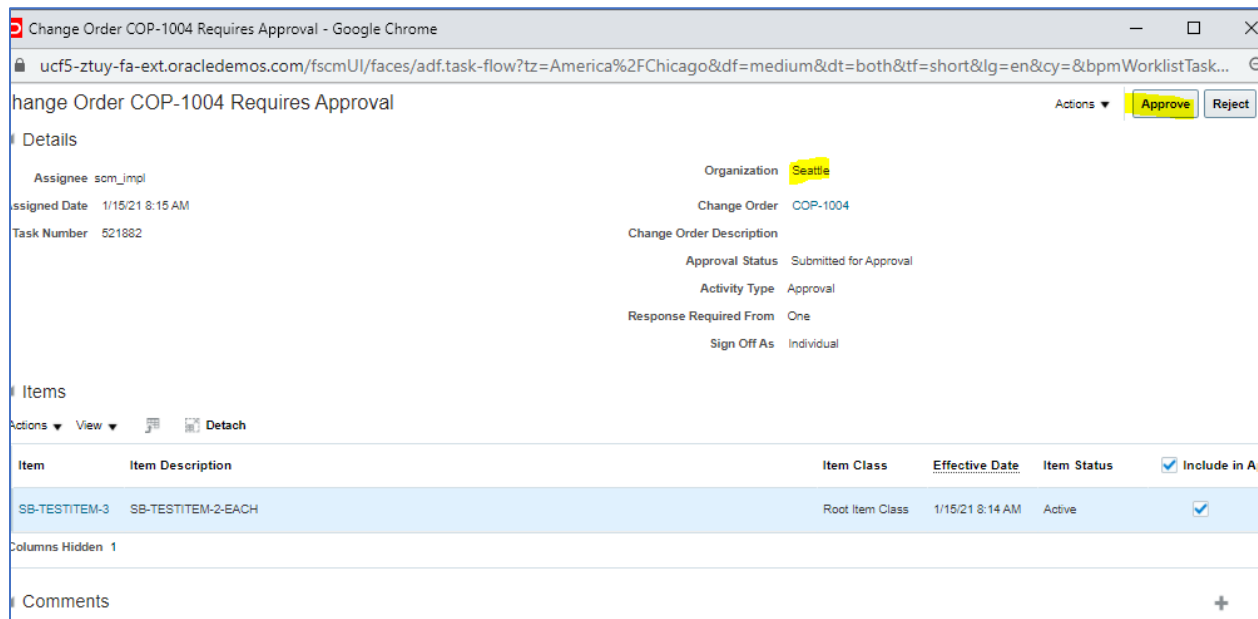
**FYI** 1 hour ago  
Change Order COP-1004 is Completed  
**Dismiss**

**APPROVED** 1 hour ago  
Change Order COP-1004 Requires Approval  
SCM\_IMPL  
**Dismiss**

**ACTION REQUIRED** 1 hour ago  
Change Order COP-1004 Requires Approval  
SCM\_IMPL  
**Approve** **Reject**

**FYI** 1 hour ago  
Change Order COP-1004 Assigned

40) Approve the change order by clicking on Approve button for 001(Seattle) organization



Change Order COP-1004 Requires Approval - Google Chrome

ucf5-ztuy-fa-ext.oraclecdemos.com/fscmUI/faces/adf.task-flow?tz=America%2FChicago&df=medium&dt=both&tf=short&lg=en&cy=&bpmWorklistTask...

### Change Order COP-1004 Requires Approval

Actions ▼ Approve Reject

**Details**

Assignee scm\_impl  
 Assigned Date 1/15/21 8:15 AM  
 Task Number 521882

Organization **Seattle**  
 Change Order **COP-1004**  
 Change Order Description  
 Approval Status Submitted for Approval  
 Activity Type Approval  
 Response Required From One  
 Sign Off As Individual

**Items**

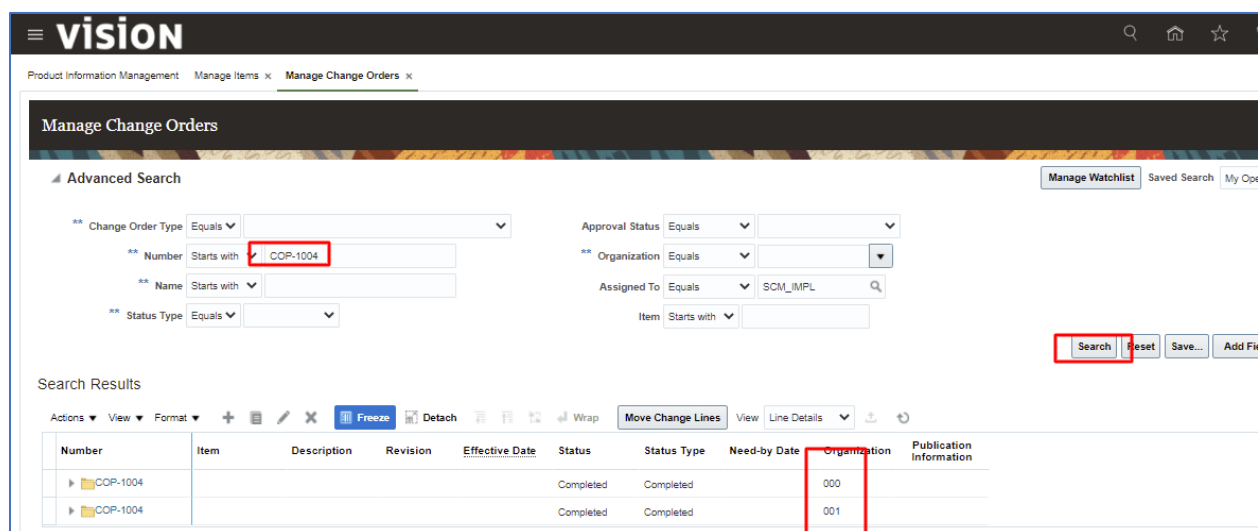
Actions ▼ View ▼ Detach

Item	Item Description	Item Class	Effective Date	Item Status	<input checked="" type="checkbox"/> Include in A
SB-TESTITEM-3	SB-TESTITEM-2-EACH	Root Item Class	1/15/21 8:14 AM	Active	<input checked="" type="checkbox"/>

Columns Hidden 1

**Comments** +

41) Search for the change order again through Manage Change Orders page through task panel. Now the change orders in both the organizations are in Completed status.



vision

Product Information Management Manage Items x Manage Change Orders x

### Manage Change Orders

Advanced Search Manage Watchlist Saved Search My Open

\*\* Change Order Type Equals ▼  
 \*\* Number Starts with **COP-1004**  
 \*\* Name Starts with ▼  
 \*\* Status Type Equals ▼

Approval Status Equals ▼  
 \*\* Organization Equals ▼  
 Assigned To Equals SCM\_IMPL Q  
 Item Starts with ▼

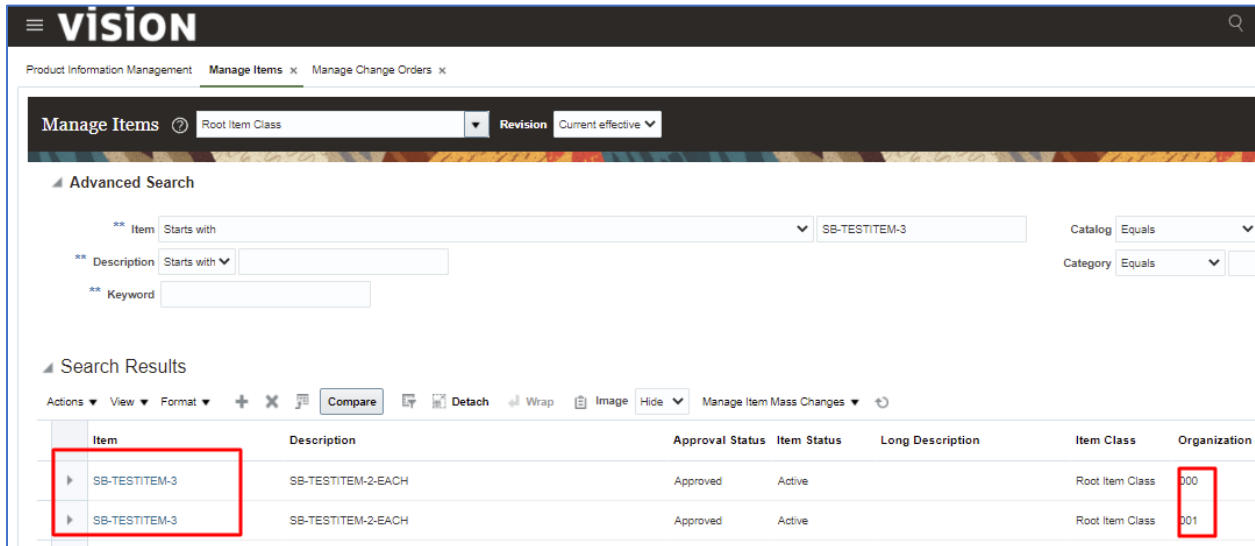
Search Reset Save... Add File

**Search Results**

Actions ▼ View ▼ Format ▼ + ✖ Freeze Detach Wrap Move Change Lines View Line Details ▼ ↺

Number	Item	Description	Revision	Effective Date	Status	Status Type	Need-by Date	Organization	Publication Information
COP-1004					Completed	Completed		000	
COP-1004					Completed	Completed		001	

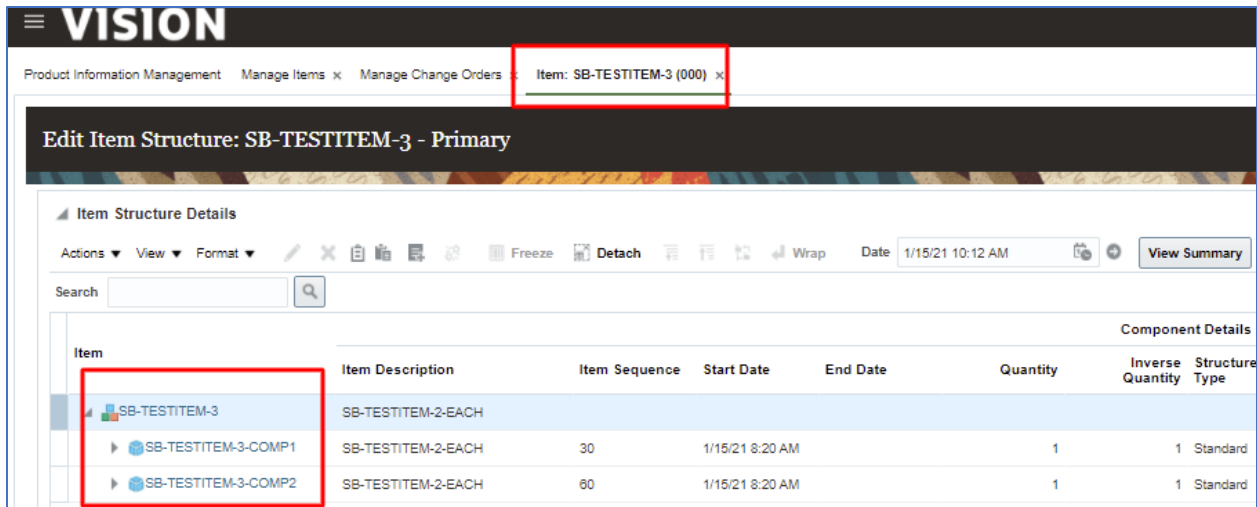
42) Now verify the items by opening them in edit mode through Manage Items link available in task panel.



The screenshot shows the 'Manage Items' page in the VISION system. The 'Advanced Search' section has 'Item' set to 'Starts with SB-TESTITEM-3'. The 'Search Results' table lists two items:

Item	Description	Approval Status	Item Status	Long Description	Item Class	Organization
SB-TESTITEM-3	SB-TESTITEM-2-EACH	Approved	Active		Root Item Class	000
SB-TESTITEM-3	SB-TESTITEM-2-EACH	Approved	Active		Root Item Class	001

Below is the structure for 000 organization



The screenshot shows the 'Edit Item Structure: SB-TESTITEM-3 - Primary' page. The breadcrumb trail indicates 'Item: SB-TESTITEM-3 (000)'. The 'Item Structure Details' section shows the following structure:

Item	Item Description	Item Sequence	Start Date	End Date	Quantity	Inverse Quantity	Structure Type
SB-TESTITEM-3	SB-TESTITEM-2-EACH						
SB-TESTITEM-3-COMP1	SB-TESTITEM-2-EACH	30	1/15/21 8:20 AM		1	1	Standard
SB-TESTITEM-3-COMP2	SB-TESTITEM-2-EACH	60	1/15/21 8:20 AM		1	1	Standard

Below is the structure for 001 organization. Structure changes have been successfully propagated from 000 organization to 001 organization

**VISION**

Product Information Management
Manage Items x
Manage Change Orders x
Item: SB-TESTITEM-3 (001) x

Edit Item Structure: SB-TESTITEM-3 - Primary

Item Structure Details

Actions View Format Freeze Detach Wrap Date 1/15/21 10:15 AM

Search

Item	Item Description	Item Sequence	Start Date	End Date	Quantity
SB-TESTITEM-3	SB-TESTITEM-2-EACH				
SB-TESTITEM-3-COMP1	SB-TESTITEM-2-EACH	30	1/15/21 10:06 AM		1
SB-TESTITEM-3-COMP2	SB-TESTITEM-2-EACH	60	1/15/21 10:06 AM		1

### Conclusion:

Thus we can create structure changes with help of change order in one organization and propagate structure changes to other organizations with the help of change orders.

### About Author:

Snehashri Bhosale is Consultant with more than 6 years of experience in Oracle Product Management Modules. She has been part of implementation and support projects.

