

# PL2572: BOM Management with Autodesk® PLM 360: Advanced Topics

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# Your Instructors



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# Class summary

## *Configure PLM 360 In Accordance With Your BOM Processes*

This class covers advanced topics and customization abilities for bill of materials (BOM) and change management processes in Autodesk PLM 360 cloud-based product lifecycle management software, including changes to the lifecycle map, BOM views configuration, permission and access management, and more.

# Class Flow

- Introductions and Administration
- Lifecycles
- Change Management
- BOM Views and BOM Configuration

# Confidentiality

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# Lifecycles

# Items Go Through Changes

- When item is 'Ready', an Item Revision is 'locked'
  - Ready for review
  - Ready for prototype
  - Ready for production

Item / Part Number

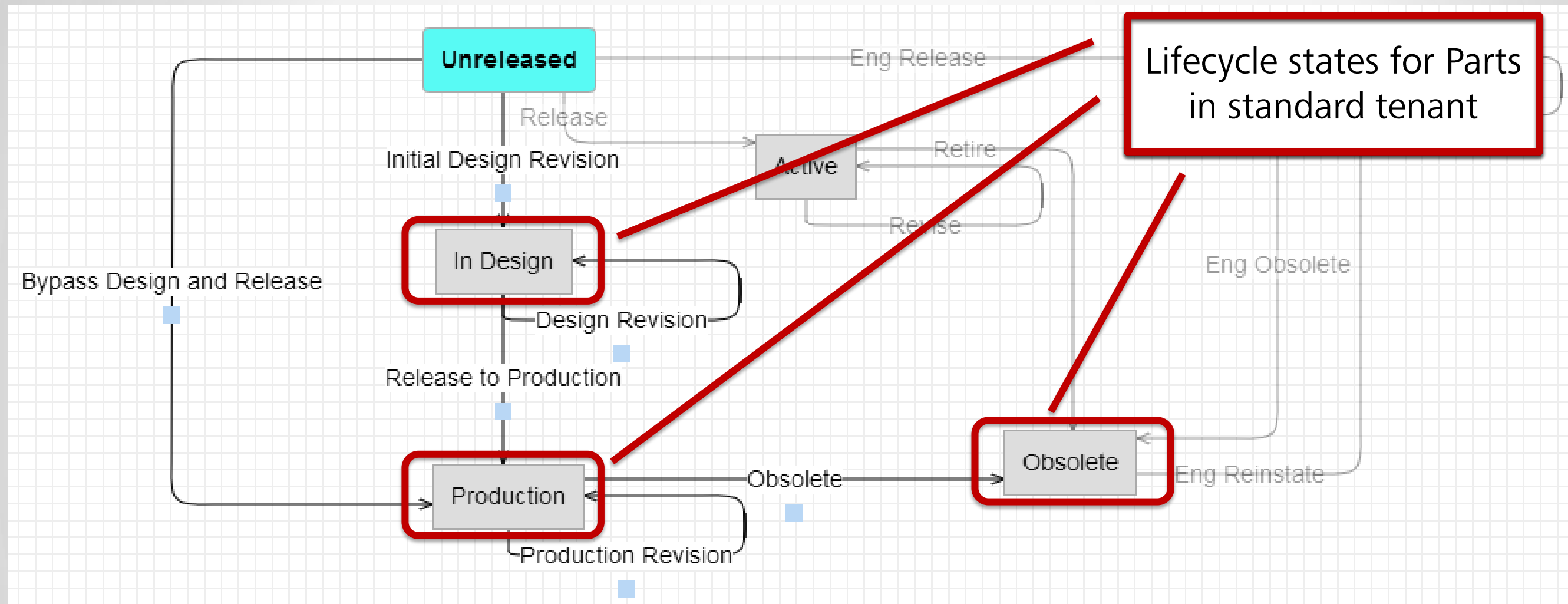
Rev A

Rev B

Rev C



# 'Readiness' Captured In Lifecycle States



**Lifecycle States may represent Maturity or Gateway Readiness**

Item / Part Number

Rev A  
[In Design]

Rev B  
[In Design]

Rev C  
[Production]

# The Lifecycle Map

Define the LC States  
you need

Create transitions  
between LC states

Assign transitions to  
the Revisioning Item

**Only states that are  
reachable by  
traversing available  
transitions are valid  
for any Revision  
Controlled Item**

**New Lifecycle Creation**

Name

Effectivity ☐

Accept

**New Transition Creation**

Name

Obsolete ☐

Increment Version ☒

Increment Release ☒

Workspace Mapping 

Change Orders

Document Change Order

Accept

**Workspace Highlight and Mapping**

Highlight Workspaces	Available	Selected
<b>Change Orders</b>	Release	Bypass Design and Release
<b>Document Change Order</b>	Eng Release	Obsolete
	Revise	Production Revision
	Retire	Release to Production
	Eng Revise	Design Revision
	Eng Obsolete	Initial Design Revision
	Eng Reinstate	

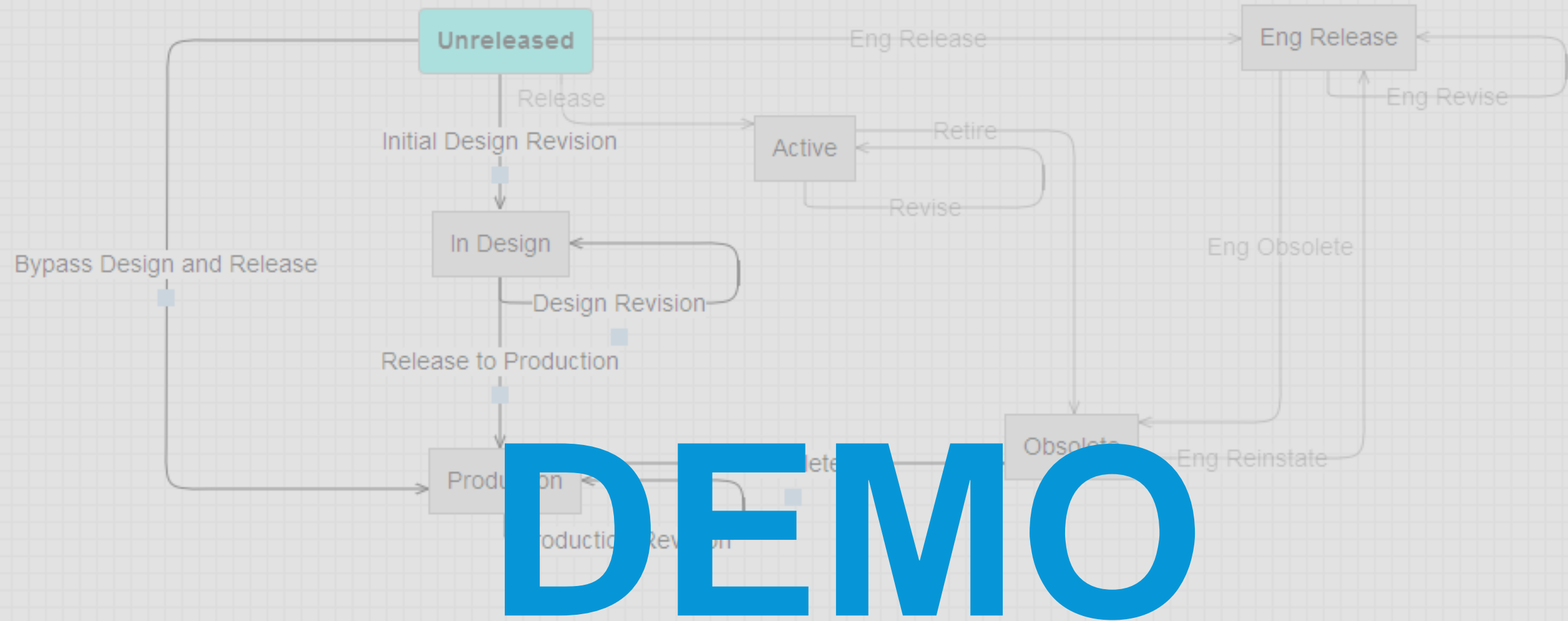
# General Setup Choices

▼ Revision Control Settings	
Working Version Always Available	<input checked="" type="radio"/> Yes <input type="radio"/> No
Revision Number Generation	<input checked="" type="radio"/> Automatic <input type="radio"/> Manual
▼ Bill of Materials Settings	
BOM Quantity Length	<input type="text" value="5"/>
BOM Quantity Precision	<input type="text" value="1"/>



**Automatic is Alphabetic  
without gaps**

**Manual is whatever you  
want it to be...**



# DEMO

## Configuring the Lifecycle Map

Workspace Highlight and Mapping

Highlight Workspaces

Change Orders

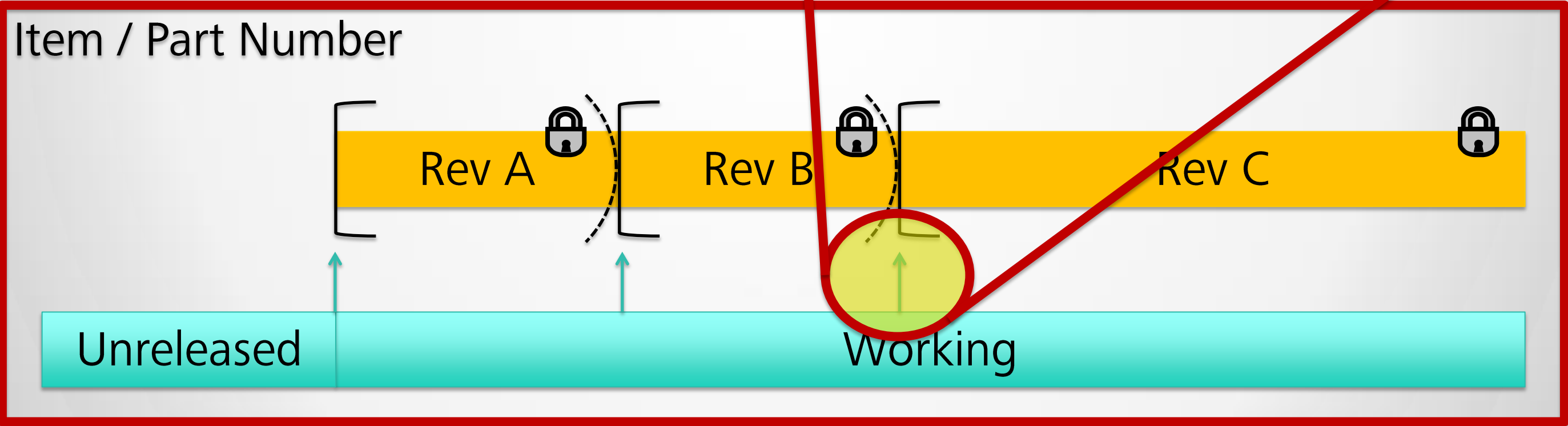
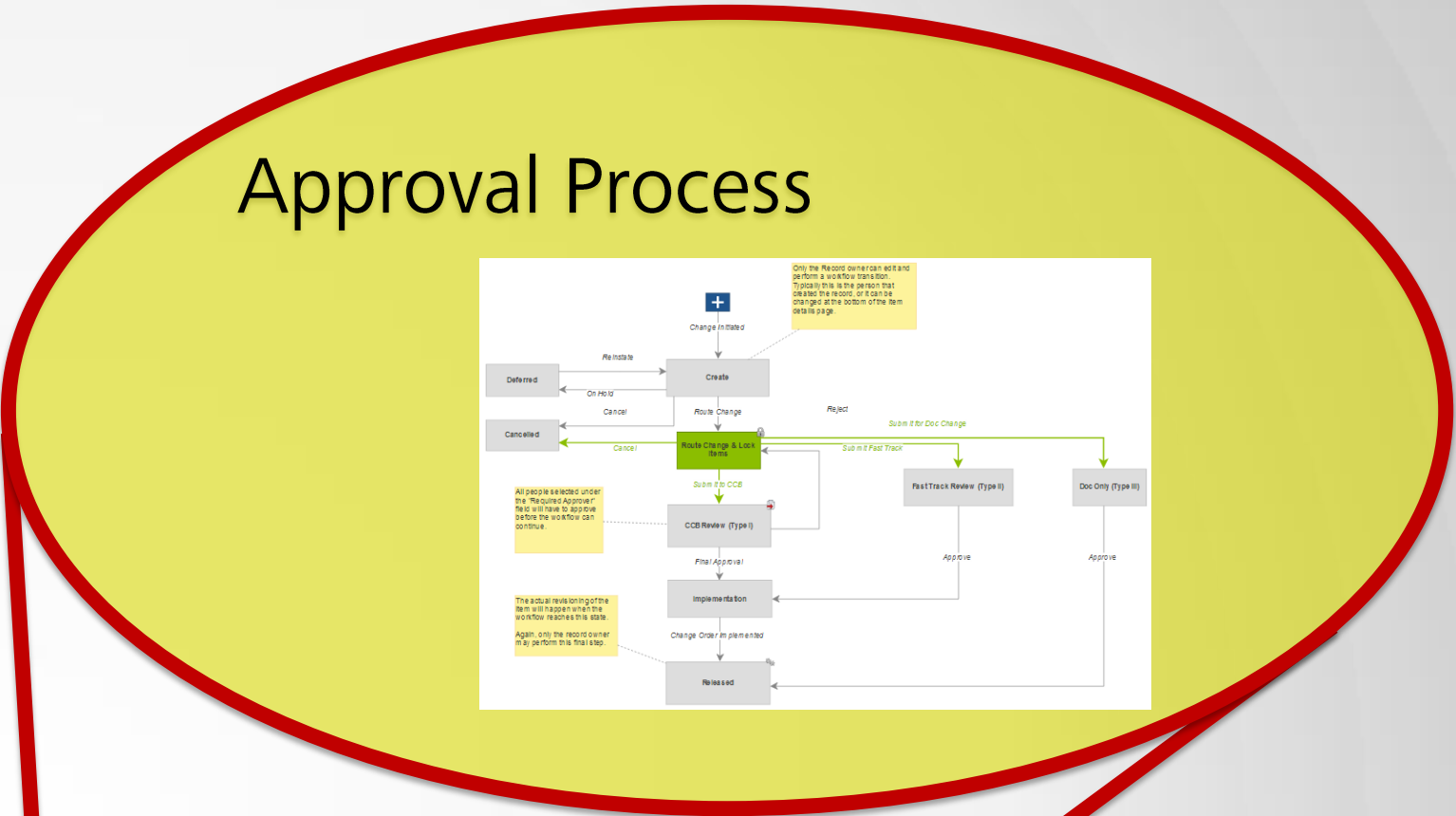
Document Change Order

Available	Selected
Release	Bypass Design and Release
Eng Release	Obsolete
Revise	Production Revision
Retire	Release to Production
Eng Revise	Design Revision
Eng Obsolete	Initial Design Revision
Eng Reinstate	

# Change/Release Management

# Release/Revision Process


**Approval Process is associated to a Revisioning Item aka Change Order**







# Use Change Order To Release/Revise Items

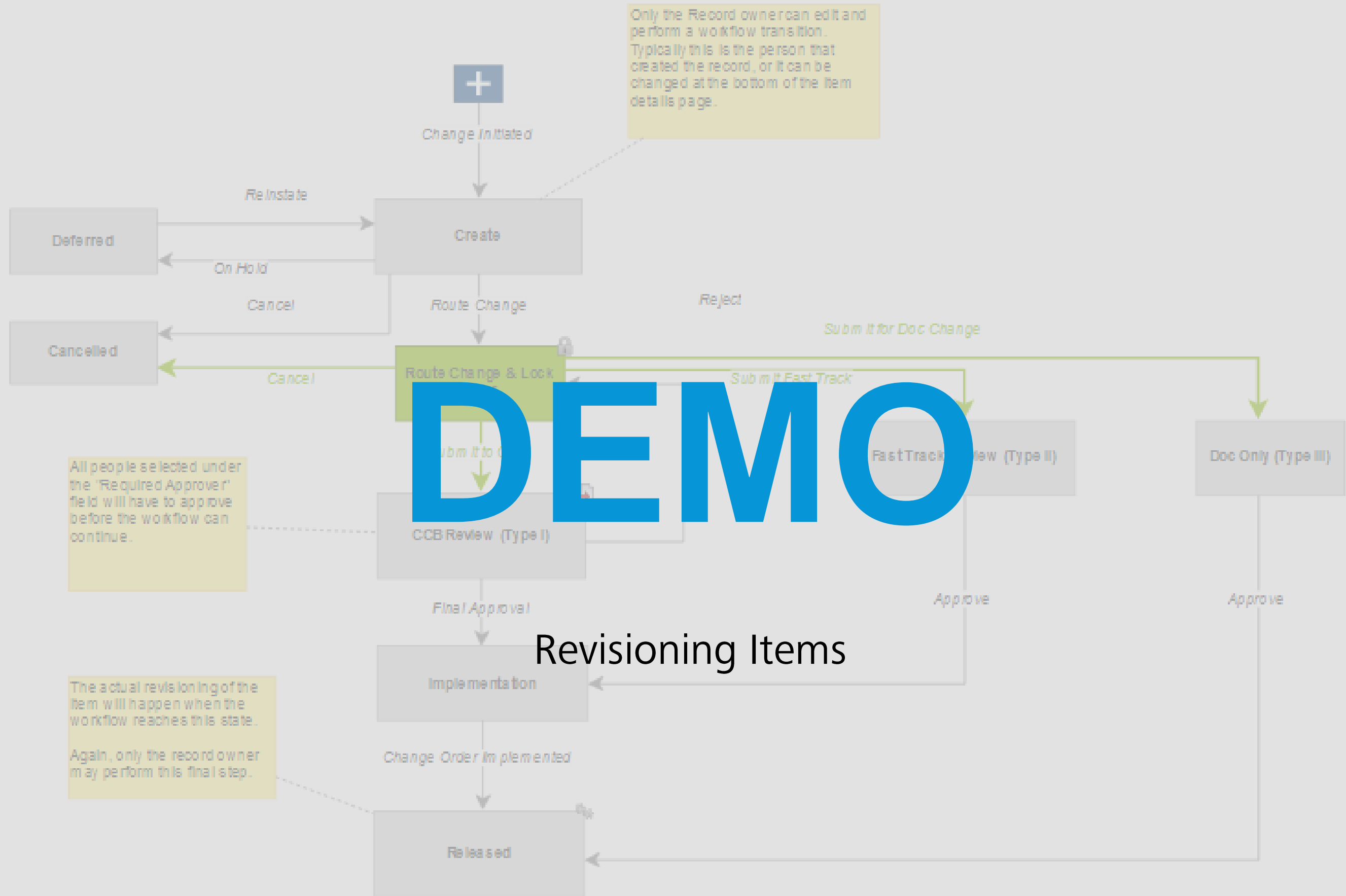
- Set Lifecycle transition
- Set Effectivity
- Set custom properties like Disposition

 **CO000002 - Change Valve Fitting - 3 - High**

State **Route Change & Lock Items** 

Item Details ▼ **Affected Items (1)** Change Tasks (2) Impacted Products (1) ▼ Attachments (1) Workflow Actions

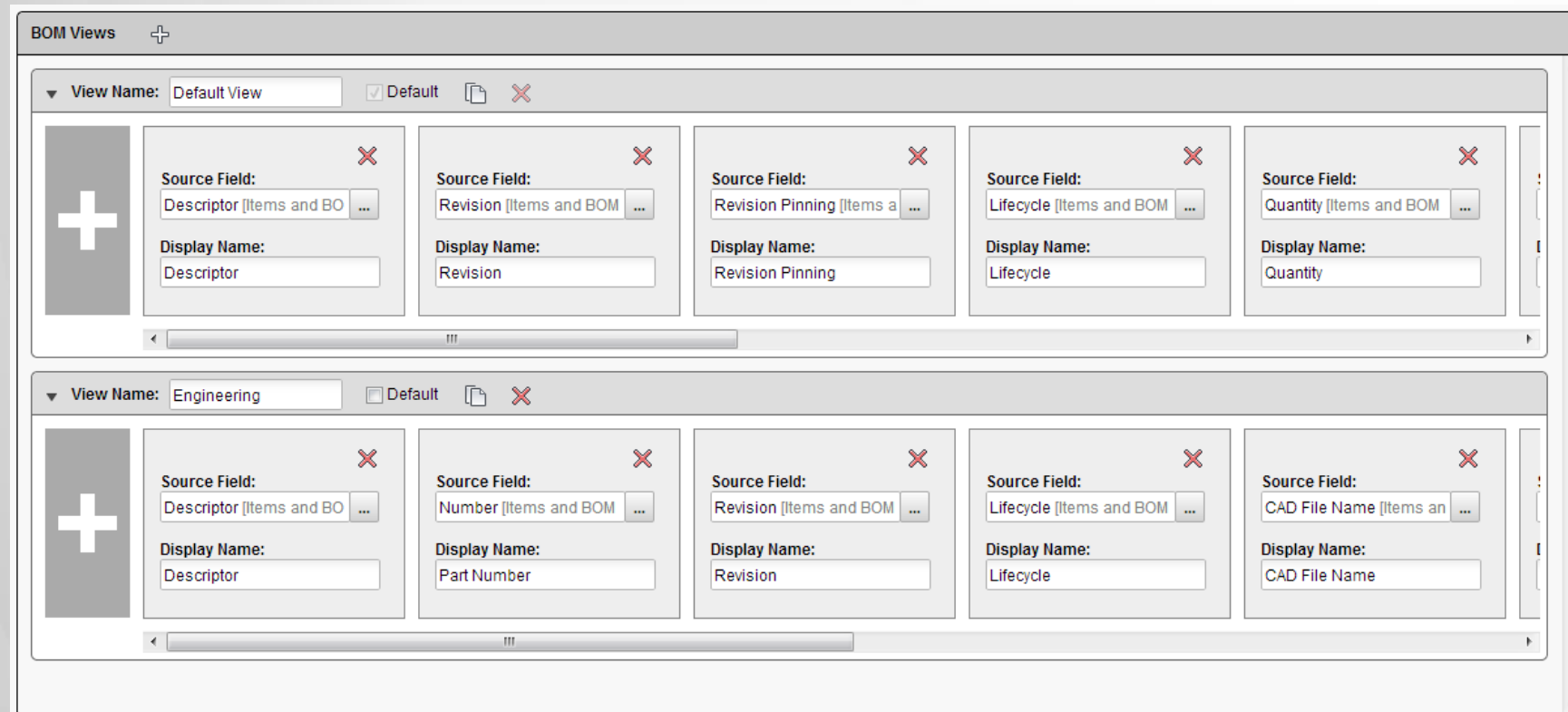
#	Item	Lifecycle	Effectivity
1	163-0000-000 - VALVE BALL 1/2" Female-Female Threaded , [REV:w]	<div>Production Revision ▼ Select... Production Revision Obsolete</div>	<div>On Release  <input type="button" value="Today"/> <input type="button" value="Clear"/></div>



# BOM Views and BOM Configurations

# What Information Do You Want To See In The BOM?

- Different Roles need to see different things in the BOM
  - Engineering need to see Performance Characteristics
  - Manufacturing need to see physical characteristics
  - Procurement need to see Suppliers and Quotes



**BOM Views allow you to configure different views for different roles and purposes**

# Rollup Fields

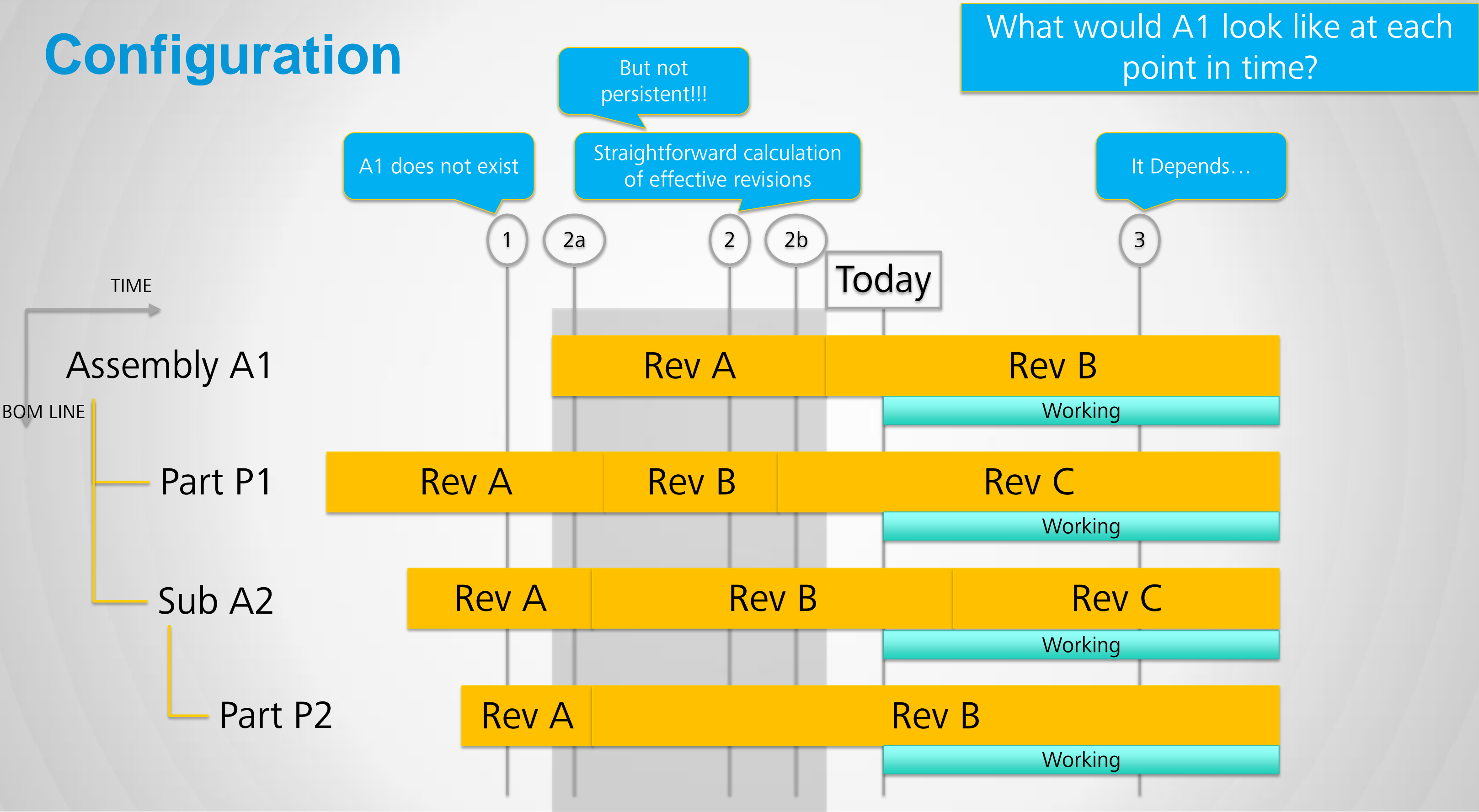
- What is the Total Material Cost of the Product?
- What is the Total Weight of the Product?
- Are all the items in the BOM ROHS Compliant?

Name	Description
Minimum	Find the lowest number in the BOM
Maximum	Find the highest number in the BOM
Sum with Adjustment	Calculate the sum of the child source fields and add the parent source field to the total
Sum with Override	If the parent item has a value in the source field, use it. Otherwise use the sum of the children

Close

**Use Rollups to find out!!!**

# Configuration





DEMO

BOM Views

