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1 Product Specifications View

1.1 Product Specifications Quick Guide

In the Product Specifications view of the Product Development work center, you can create new product specifications that record customer requirements for your products.

For a business that manufactures or sells products based on customer requirements, it is vital to have accurate records of each product variant that was configured, produced, or sold based on these customer requirements. Product specifications enable you to define and store the configuration information that characterizes such a product variant. The content of a product specification can consist of notes, attachments, and a selection of product property values that represent the customer requirements.

You can define product specifications in the following ways:

- Before you create a product specification for your product, you create a product model that then serves as a template to create your product specification. The product model already contains properties and values that represent a possible range of product variants.
- You create a product specification ad hoc without using a product model.

The Product Specifications view is available in the following work centers:

- Product Development
- Product and Service Portfolio
- Planning and Production Master Data

Product specifications enable your sales team to record customer requirements quickly and accurately. They also provide the sales team with rules for possible product configurations. Your design team can use the view to define possible features and combinations of features for each product. You can define your most commonly requested product variants and create notes for production. Product specifications can be used in planning and execution for your production and purchasing. It is also possible to open a print form of a product specification to print, send by e-mail, or save the product specification in PDF format.

Business Background

Product Definition

The Product Definition business scenario allows you to specify the product that you have sold to your customer and ensures that you build the product exactly as it was specified. This is particularly relevant when your company offers products that come in many variants or when it offers custom-built products described by detailed customer requirements. You can define possible product variants by product properties, product models, product specifications, and reuse the product variants.

- Product properties describe the features a product can have.
- Product models describe the possible variations of a product.
- Product specifications describe individual customer requirements or products variants. You can create product specifications within SAP Business ByDesign or import them from an external system.
Product Definition supports streamlining product portfolio and production, meeting customer requirements in delivered product, and, reducing Product Master management effort.
For more information see Product Definition.

Product Development

The Product Development business scenario provides you with comprehensive functionality to develop new products or to significantly improve the quality of products and processes. Inspired by the Advanced Product Quality Planning (APQP) framework, it covers all important stages from the definition of a product development project to the approval of mass production (and project closure). It covers the planning of a product development project, the engineering and prototyping of a product, the definition of the production process and sample master data, as well as the production of samples and the validation of the production process by continuous improvement. It is a project structured scenario that includes tools and techniques of Total Quality Management to achieve strategic business results, such as reducing field failure risks, product returns and warranty costs, and ensuring higher customer satisfaction.

Tasks

Create a Product Specification

You can create and edit product specifications for your product variants. You can create a product specification for a material that has already been created in the Materials view. It is also possible to create a product specification without a material. To use product properties and product models with your product specification, you must define them in their respective views and associate a product model with the product.

1. Go to the Product Development work center and then choose the Product Specifications view.
   You can also create product specifications using the Product Specifications view in the Product and Service Portfolio work center and the Planning and Production Master Data work center. You can also access the New Product Specification quick activity from the Sales Order editor in the Sales Orders work center.

2. Click New to open the New Product Specification quick activity.

3. Enter the general information:
   • In the Product Specification ID field, enter a product specification ID.
     If you do not enter a product specification ID, the system automatically assigns one.
   • In the Product Specification Description field, enter a product specification description.
   • In the Product ID field, enter a product ID or select one using the Open Selection Dialog icon to bring up a list. If the product you select has a product model associated with it properties, notes and attachments may appear.

4. Enter the values you require in the correct fields. Mandatory fields are marked accordingly.
5. In the **Notes** field, enter any notes you require. To add an attachment to this product specification, in the **Attachments** section, click **Add** and choose to add either a file or a link.

6. To save and release your work do the following:
   - If you are finished with your product specification and want to protect it against unwanted changes, you have to release it.
     Click **Change Status** and select **Released**.
   - Click **Save**.

   The new product specification is saved and released. It is now protected against unwanted changes.

**Search for a Product Specification**

You can search for existing product specifications by attributes, for example, descriptions, IDs and the properties that have been used in product specifications. This is useful for you if you want to reuse existing product specifications for common product variants or if you want to find out if a special product variant has already been specified in the past.

1. To search for a product specification type in any of the following attributes or a combination of them into the **and Find** field:
   - ID of the product specification
   - Product specification description
   - Status
   - Name of the responsible employee
   - Product ID
   - Product description
   - Property description
   - Property ID
   - Property value

2. Click **Go**.

   This search for product specifications using the above mentioned attributes is possible in all applications where product specifications are used.

**Example**

Erin Eycken is helping a sales colleague to find out if a black, 50 gallon, oil-fueled boiler has been requested by a customer before.

To find the product specification, she types the following values into the **and Find** field: Black oil 50. Then she clicks **Go**.

As a result all relevant product specifications are displayed as a search result and can be reused.

**Generate a PDF of a Product Specification**

It is also possible to open a print form of a product specification to print, send by e-mail, or save the product specification in PDF format. This print form includes the notes and the names of the attachments of a product specification but does not include the where-used list.

1. To generate a PDF of a product specification, select the product specification for which you want to generate a PDF and click **Preview**.
2. To display the PDF, select the PDF in the list and click **Open**. You can now print, save, or e-mail the PDF if necessary.

**Work with Tasks, Notifications, Alerts, and Clarification Requests**
For more information about working with tasks, notifications and alerts, see here.
For more information about working with clarification requests, see here.

**Export Business Data Using Microsoft Excel®**
You can export different types of data from the SAP Business ByDesign system to Microsoft Excel
For more information about this task, see Export Business Data Using Microsoft Excel [page 7]

**See Also**
- Product Models Quick Guide [page 9]
- Create a Product Model [page 11]
- Product Properties Quick Guide [page 13]
- Synchronization of Notes and Attachments between Product Models and Product Specifications

**1.2 Tasks**

**1.2.1 Export Business Data Using Microsoft Excel®**

**Overview**
You can export reports and worklists to Microsoft Excel® documents. You can use these documents for further analysis, and in some cases, edit and upload them to the solution.
You can export data from a report or from a worklist.

**Prerequisites**
- You have installed the latest **Add-In for Microsoft Excel®**. Depending on your solution set-up, you can do this from the:
  - **Self Services Overview** in the **Home** work center
  - **Download Center** in the **Application and User Management** work center
  - **Download** link that is available directly on the user interface
- The settings for your browser must be set correctly. You can review the information about computer settings by clicking **Check My Computer Settings** on the logon screen.
- You must be authorized to perform an export to Microsoft Excel®.

**Procedure**
1. Go to the screen with the data you want to export.
2. Depending on the type of data, choose one of these options:
   - For a report, you can either export a chart or a table. To do so, select the report, and click **Switch to Chart** or **Switch to Table**.
   - For a worklist, select the worklist and click **Go**.
3. Click **Export**; then choose **To Microsoft Excel**.
4. **Optional: Personalizing your excel export**
   1. To select the columns in your exported excel, do the following:
      a. In the title bar, click **Personalize**
      b. In the side panel, select **Display Settings**.
      c. In the Display Settings dialog box, you can export all the columns in the view by selecting **All** in the **Export Columns** field
         - The default value for this field is **Visible**, which exports only the currently displayed columns.
   2. To select the language for your excel export, do the following
      a. In the Display Settings dialog box, set the **Language Selection** field to **Show** and click **OK**
      b. Click **Save**.
      c. Click **Export**; then choose **To Microsoft Excel**
      d. Select a language in the dialog box that opens.
         - The column selection preference in this dialog box allows you to override the personalized setting. This selection is valid for the current export only.
5. Select the template in the dialog box that is displayed.
   - If there is only one template that has the logged in language variant, then the export will be performed in the logged in language, and no user interaction is required.
   - If there is only one template in the system for this export scenario, but the logged in language variant is not available, then export will be performed in the English language.
   - If there is more than one template in the system for this export scenario, the **Template List** dialog box is displayed. In this dialog, you can select the Microsoft Excel template that you want to use for the export. The template will dictate how your exported data will be formatted. The Microsoft Excel version that is relevant for each template is displayed.
6. Click **Download**.
7. A message shows that you can open or save the file which contains the data that you have just exported from the solution. Click **Open** or **Save** depending on what you want to do with the exported data.
   Depending on whether you click **Open** or **Save**, there are two possible results:
   - If you click **Open**, a worksheet opens with the data in Microsoft Excel. The file has a temporary name, but it is not saved. You can use all the functions of Microsoft Excel to organize the data and to save that worksheet.
   - If you click **Save**, a **Save As** dialog box opens. You can specify an appropriate file name and a location to save the exported Microsoft Excel file to. A message will inform you when the download has completed successfully. You can later navigate to the location where you have saved the template and open it.
2 Product Models View

2.1 Product Models Quick Guide

The Product Models view of the Product Development work center enables you to create, copy, and edit product models. Product models gather one or more product properties together with their value ranges, default values, notes, and attachments into templates. They can then be used to create product specifications that represent the possible variants of a product.

You can also use the product models view to create new product properties and set the allowed values for product properties.

- Only products can be assigned to a product model, you cannot assign service products to your product models.
- A product can only be assigned to a single product model but a product model can have multiple products assigned to it. When you copy a product model, the existing product assignments are not copied.

Business Background

Product Definition

The Product Definition business scenario allows you to specify the product that you have sold to your customer and ensures that you build the product exactly as it was specified. This is particularly relevant when your company offers products that come in many variants or when it offers custom-built products described by detailed customer requirements. You can define possible product variants by product properties, product models, product specifications, and reuse the product variants.

- Product properties describe the features a product can have.
- Product models describe the possible variations of a product.
- Product specifications describe individual customer requirements or products variants. You can create product specifications within SAP Business ByDesign or import them from an external system.

Product Definition supports streamlining product portfolio and production, meeting customer requirements in delivered product, and, reducing Product Master management effort.

For more information see Product Definition.

Product Development

The Product Development business scenario provides you with comprehensive functionality to develop new products or to significantly improve the quality of products and processes. Inspired by the Advanced Product Quality Planning (APQP) framework, it covers all important stages from the definition of a product development project to the approval of mass production (and project closure). It covers the planning of a product development project, the engineering and prototyping of a product, the definition of the production process and sample master data, as well as the production of samples and the validation of the production process by continuous improvement. It is a project-structured scenario that includes tools and techniques of Total Quality Management to achieve strategic...
business results, such as reducing field failure risks, product returns and warranty costs, and ensuring higher customer satisfaction.

Tasks

Create a Product Model

For information about this task, see Create Product Model [page 11]

Search for Product Models

You can search for existing product models by their attributes, for example, descriptions, IDs, and the properties that have been used in those product models. This is useful for you if you want to reuse existing product models.

1. To search for a product specification type in any of the following attributes or a combination of them into the and find field:
   - ID of the product specification
   - Product specification description
   - Status
   - Name of the responsible employee
   - Product ID
   - Product description
   - Property description
   - Property ID
   - Property value

2. Click Go.
   All product models where the attributes that you specified are used are displayed as a search result.

This search for product models using the above mentioned attributes is possible in all applications where product models are used.

Work with Tasks, Notifications, Alerts, and Clarification Requests

For more information about working with tasks, notifications and alerts, see here.
For more information about working with clarification requests, see here.

Export Business Data Using Microsoft Excel®

You can export different types of data from the SAP Business ByDesign system to Microsoft Excel®.
For more information about this tasks, see Export Business Data Using Microsoft Excel® [page 7]

See Also

Synchronization of Notes and Attachments between Product Models and Product Specifications
2.2 Tasks

2.2.1 Create a Product Model

Overview
You can use the Product Model quick activity to create product models. You can create and assign properties, assign products, set default values, restrict property value ranges, indicate that the valuation of a property is obligatory, and add notes and attachments.

Procedure
1. Go to the Product Development work center and choose the Product Models view. You should have created the master data for the related products and product properties before you create a product model.
2. To open the New Product Model quick activity, click New and choose Product Model.
3. In the Product Model ID field, enter a product model ID. In the Product Model Description field, enter a product model description.
4. In the Product Assignment section, click the link to assign products to this product model. You can use the Open Selection Dialog icon in the Product ID field to select a product from a list of all products. To assign additional products to the product model click the Add icon. To remove products to the product model click the Delete icon.
5. Add properties and set default values:
   a. In the Properties and Default Values section, click the link to add properties to this product model. You can use the Open Selection Dialog icon in the Property ID field to select a property from a list of all properties.
   b. To set a default value for the property, select an option from the Default Value list.
   c. To make this property a required entry in any associated product specifications select the Value Assignment Required check box.
   d. If you want to restrict the property values that appear as options for the user to select when creating a product specification based on this model, click Set Allowed Values. Deselect the check boxes of any property values you do not want to appear.
6. For properties of the format integer, decimal, or quantity, you can limit the numerical value range that has been defined for the property by deactivating the existing value range and replacing it with one or more limited value ranges. You do so by setting allowed values:
   a. In the Properties and Default Values section, navigate to the property for which you want to limit the existing value range by setting allowed values. Click Set Allowed Values for the property.
   b. In the Set Allowed Values dialog screen, deselect the Selected check box for the existing values ranges.
   c. To enter the limited value range that you want to be used in this product model click Add Row. In the added line enter the value range that you want to be used and select the Selected check box.
   d. It is possible to have more than one limited value range in a property. To add any additional limited value range repeat step 3.
   e. Click Set Allowed Values to save your entries.
It is not possible to extend the original value range of the property by setting allowed values. You can only create limited value ranges that lie within the original value range.

7. In the Notes field, enter any notes you wish to add to this product model. To add an attachment to this product model, in the Attachments section, click Add and choose to add either a file or a link.

8. Click Save.

   The new product model is saved.
3 Product Properties View

3.1 Product Properties Quick Guide

The Product Property view in the Product Development work center provides you with the means to create, copy, and edit product properties for use in product models and product specifications. Product properties enable you to precisely define product attributes. A product property gathers and defines the possible values for a product attribute, for example, color or height. You can choose a format for the product values, set the allowed values, and add notes. Possible formats include code, quantity, Boolean, free text, integer, and decimal number. The property values are used when creating product models and product specifications.

Business Background

Working with Product Properties

In most cases, once a product property is saved the existing property values, ID, and format are set to read only, you cannot delete or change them. In the case of integers, decimal numbers, and quantities you can still edit the property values though you cannot reduce the value ranges.

If a product property is saved and later updated with a new property value it will not be reflected in any associated product models unless the user enters each product model individually and sets the allowed values. These features help to maintain data integrity in cases where you may not want to automatically update existing product specifications and models. This means that you can introduce new property values without impacting existing products.

Creating product properties enables you to define exactly what can be entered in a product specification during the sales process, increasing the speed and accuracy of product specification entries.

You assign product properties to a product model that is in turn used as a basis for a product specification. A single product property can be added to multiple product models and can thus be used in multiple product specifications. By defining in advance the possible values for properties, you increase the speed and accuracy with which your sales team can enter new product specifications. By predefining the possible product configuration values through use of these properties you can optimize your manufacturing, procurement, and planning processes.

Product Definition

The Product Definition business scenario allows you to specify the product that you have sold to your customer and ensures that you build the product exactly as it was specified. This is particularly relevant when your company offers products that come in many variants or when it offers custom-built products described by detailed customer requirements. You can define possible product variants by product properties, product models, product specifications, and reuse the product variants.

- Product properties describe the features a product can have.
- Product models describe the possible variations of a product.
- Product specifications describe individual customer requirements or products variants. You can create product specifications within SAP Business ByDesign or import them from an external system.

Product Definition supports streamlining product portfolio and production, meeting customer requirements in delivered product, and, reducing Product Master management effort.
For more information see Product Definition.

**Product Development**

The Product Development business scenario provides you with comprehensive functionality to develop new products or to significantly improve the quality of products and processes. Inspired by the Advanced Product Quality Planning (APQP) framework, it covers all important stages from the definition of a product development project to the approval of mass production (and project closure). It covers the planning of a product development project, the engineering and prototyping of a product, the definition of the production process and sample master data, as well as the production of samples and the validation of the production process by continuous improvement. It is a project structured scenario that includes tools and techniques of Total Quality Management to achieve strategic business results, such as reducing field failure risks, product returns and warranty costs, and ensuring higher customer satisfaction.

**Tasks**

**Create a Product Property**

To create new product properties to serve as the basis for product models and product specifications, proceed as follows:

1. In the Product Properties view, click [New] to open the New Product Property quick activity.
2. In the Property Description field, enter a description for your new property. Choose a format from the Format list.
3. Depending on the format you have chosen in the previous step you may need to assign values and descriptions as follows:
   - If you have chosen the Code format, in the Property Values table enter the property values and descriptions.
   - If you have chosen the Quantity format, in the Unit of Measure list choose a unit of measure. In the Property Values table enter the property values for the unit of measure. You may enter ranges here if you wish.
   - If you have chosen the Boolean or Free Text formats, you do not need to take further action.
   - If you have chosen the Integer or Decimal Number formats, in the Property Values table enter the property values. You may enter ranges here if you wish.
4. In the Notes field, enter any notes for this property.
5. Click [Save].

Once you save a product property the existing property values, property ID, and format are set to read-only. You can still update the property description, property value descriptions, and add new property values. If you save the product property and later on update it with a new property value, it will not be reflected in any associated product models unless you enter a product model and set the allowed values to include it. This allows you to update property values without causing issues with existing product models.

**Work with Tasks, Notifications, Alerts, and Clarification Requests**

For more information about working with tasks, notifications and alerts, see here.
For more information about working with clarification requests, see here.
Export Business Data Using Microsoft Excel®
You can export different types of data from the SAP Business ByDesign system to Microsoft Excel.
For more information about this tasks, see Export Business Data Using Microsoft Excel® [page 7]
4 Product Designs View

4.1 Product Designs Quick Guide

In the Product Designs view of the Product Development work center, you can use product designs to represent the design of a product during the development phase. In addition to developing new product lines, your company might want to change or replace an existing product or to develop a new version of an existing product that will be produced in addition to the original product. Such changes are often requested in response to a customer request, to meet new legal requirements, or to reduce costs.

Working with product designs provides reviewers and decision makers from different departments, such as engineering, manufacturing, and management, with a single source of information about the design of the product at an early stage in its development.

Once a product design has been approved by the reviewers and decision makers, it can be released and converted into a production bill of material (PBoM) for use in production.

In the Product Design editor, you can edit your product design versions. These versions can come from external engineering systems, can be created manually in the system, or can be uploaded to the system using a file input run. Product design versions that come from an external system can only be edited when the corresponding engineering design in the external system has been released.

Business Background

Product Engineering

The Product Engineering Business Scenario ensures that designs of your product (including drawings, descriptions, 3D representations) can be managed in SAP Business ByDesign so that you can prepare the production of the product. This includes consistent maintenance of material master data, production bills of material (PBoMs) and other prerequisites for production. This is particularly relevant when your company has a focus on engineering with frequent changes of a product or a high rate of handovers from engineering to production.

- You can create product designs from scratch or import them into SAP Business ByDesign from your external engineering system. In SAP Business ByDesign you can maintain them in order to match production capabilities.
- When released, product designs can be handed over to production and a production bill of material is generated automatically.
- Materials can be assigned to product designs or to the associated production bill of material.
- Production models are generated from the production bill of materials, providing the basis for production.

For more information, see Product Engineering.

Product Designs

A product design allows you to group information about a product manufactured or designed by your company before the design is released for use in follow-on processes, such as production. It contains engineering information about the product and can exist in one or more versions.

Each version of a single product design usually corresponds to a product with the same fit, form, and function.
Once you have released a product design it can be used as the basis for the creation of a new production bill of material (PBoM).

You may wish to make changes to the design of a product, or to develop a new product for a number of reasons; for example, in response to a customer request, to meet new legal requirements, or to reduce costs.

You create a new product design when you develop a new product, replace a product, or develop a new version of a product for production in addition to the original product. Therefore, it is possible to create multiple product design versions of the same product design. The first time you create a new product design the system creates a product design with the version 1. Following product design versions that relate to the same product design are numbered sequentially allowing you to keep track of related product design versions more easily.

For more information, see Product Designs [page 22]

**Product Development**

The Product Development business scenario provides you with comprehensive functionality to develop new products or to significantly improve the quality of products and processes. Inspired by the Advanced Product Quality Planning (APQP) framework, it covers all important stages from the definition of a product development project to the approval of mass production (and project closure). It covers the planning of a product development project, the engineering and prototyping of a product, the definition of the production process and sample master data, as well as the production of samples and the validation of the production process by continuous improvement. It is a project structured scenario that includes tools and techniques of Total Quality Management to achieve strategic business results, such as reducing field failure risks, product returns and warranty costs, and ensuring higher customer satisfaction.

**Tasks**

You use the *Product Designs* view to create, edit, copy, and export product designs and to convert them into PBoMs for use in production.

**Create a Product Design**

1. To create a new product design, click **New** and then choose **Product Design**.
2. On the **General** tab, enter the general information, including the following mandatory information:
   - In the **Product Design ID** field, enter a product design ID. If you do not enter a product design ID, the system generates an ID.
   - In the **Base Quantity** field, enter the base quantity of the product represented by this product design.
3. On the **General** tab, in the **Detailed Structure** table, you can also enter other product designs that are components of this product design. Once you have selected a product design, you can also change the product design version by clicking the name of the product design version. The system then displays all product design versions that relate to this product design. You can also change the quantity in which these components are used.
4. On the **Where Used** tab, you can add products that are represented by this product design.
5. In the **Notes** field enter any notes you require. To add an attachment to this product design, in the **Attachments** section, click **Add** and choose to add either a file or a link.
6. Click **Save** to save your new product design.
The new product design is saved. It is automatically assigned the product design version ID 1 and has the status In Preparation. You can now change the status of the product design.

Create a Product Design Version

In the Product Development work center, you can also create a new product design version based on an existing product design.

1. In the Product Development work center, choose Product Designs.
2. To create a new product design version, select the product design for which you want to create a new product design version, click New, and then choose Product Design Version.
3. On the General tab, you can change the product design description and base quantity proposed by the system. Under Detailed Structure, you can also change the component product designs or the versions of these product designs and the quantities in which these components are used.
4. On the Where Used tab, you can add products that are represented by this product design version.
5. In the Notes field enter any notes you require. To add an attachment to this product design version, in the Attachments section, click Add and choose to add either a file or a link.
6. Click Save to save your new product design version.

The new product design version is saved. It has the same product design ID and product design description as the original product design on which it was based. The system automatically assigns the next available number in the sequence as the Product Design Version ID. The product design version has the status In Preparation. You can now change the status of the product design version.

- If you change the values in the fields Product Design Description or Employee Responsible for a product design version, the system copies the new information to all product design versions with the same product design ID.

Handover a Product Design to Production

In the Product Development work center you can hand over a product design to production by converting it into a production bill of material (PBoM). This PBoM can then be used in production. You can convert a single product design version into multiple PBoMs.

- Only product designs that represent assemblies can be converted into PBoMs. These product designs have the component type Assembly. In addition, product designs must be released, and because it is an assembly, all of its components must be released. For components with unspecified version, they must at least have one valid released version.
- Before a product design version can be converted into a PBoM, it must have the status Released.

1. In the Product Development work center, choose Product Designs.
2. Select the product design version you want to convert and click Edit. Check that the status of the product design version is already set to Released. If not, check that this
product design version is ready to be released, click **Change Status**, and choose **Release**.

3. Click **Convert to Production BoM**. The system displays the following input parameters for the conversion:

   - **Explosion date**
     The system proposes the current date. You can change this date; however, you must enter a date after the valid from date of the product design version.

     This field is only visible if you work with validity date-based versioning. If your product design contains component product designs for which no version is specified, the system chooses the released version that has a valid from date that is the same as or closest to the explosion date. The system only includes dates before the explosion date.

   - **Bill of Material ID (BoM ID)**
     Enter an ID for the PBoM. The system generates a PBoM with the variant ID 1 during hand over.

     It is not possible to use an existing PBoM ID to generate a new PBoM variant.

   - **Engineering Change Order ID (ECO ID)**
     In order to generate a PBoM, you must specify a valid existing engineering change order or a new engineering change order (ECO) must be created. You can choose from the list of existing engineering change orders with the status **In Process** or choose to enter a new ECO ID to allow the system create a new one.

   - **Valid from**
     If you are using a new ECO ID, enter a valid from date. If you are using an existing ECO, you can leave this field blank. The valid from date of the ECO must be on or after the valid from date of the product design version and the explosion date. If you are using an existing ECO ID, and you enter a valid from date that is different to that of the existing ECO, the system does not change the valid from date of the existing ECO.

4. Click **Generate Production BoM**.

5. In the **Product Design** editor, click **Save**. when you save your product design, the system creates a link between the product design and the new PBoM variant. A PBoM variant is created and can be used in production. This PBoM has the same structure as the product design. The PBoM is always single level, this means that the PBoM consists of a flat list of the component product designs in the product design. The system does not explode the product design any further.

You can see the PBoM created from a product design under **Production BoMs** on the **Where Used** tab. By clicking on the name of the PBoM variant, you can access the **Production Bill of Material Overview**. Alternatively, you can access the PBoM in the **Planning and Production Master Data** work center.

### Set the Status for a Product Design and a Product Design Version

In the **Product Designs** view, you can set the status of a product design or product design version. The status of the product design or version, which is always **In Preparation** when the product design or version is first created, can be set to **In Review**, **Blocked**, **Unblocked**, **Released**, or **Obsolete**.
A new product design automatically has the status *In Preparation*. Once it is ready to be reviewed, you can set the status to *In Review*. You can release a product design once it has been approved, block it if it has not been approved, and unblock it at a later date, or set it to obsolete if you decide that it is not to be used in the future.

There are preconditions for status setting to *Released* and *In Review*:

1. In order to release a Product Design Version with the component type *Assembly*, its components must be in status *Released* and in order to set the status of a Product Design Version with the component type *Assembly* to *In Review*, its components must either be *In Review* or *Released*.

1. To set the status for a product design or a product design version in the *Product Development* work center, choose *Product Designs*.
2. Select the product design or the product design version for which you want to set the status and click *Edit*.
3. In the *Product Design* editor, click *Change Status*, and then choose the relevant status.

1. Once you have released a product design the only possible changes to the status are to block and unblock it or set it to obsolete. Setting a product design to obsolete means that you can no longer work with that product design.

**Generate a PDF of a Product Design**

It is also possible to open a print form of a product design version and to print, send by e-mail, or save the product design version in PDF format. You can specify the explosion level, if the print form includes notes on top level and component level and if it includes a where used list.

1. To generate a PDF of a product design or a product design version, select the product design or product design version for which you want to generate a PDF and click *Preview*.
2. In the *Preview Settings* specify the information that is to be included in the PDF and click *OK*.
3. In the *Preview*, you can now select the generated PDF and open for display. You can now print, save, or e-mail the PDF if necessary.

**Work with Product Designs from an External Engineering System**

In the *Product Development* work center, you can work with product designs that have been created from engineering designs created in an external engineering system and sent to SAP Business ByDesign.

The sending of product designs created from an external engineering system to SAP Business ByDesign is controlled by settings made in the external engineering system. These settings control under what circumstances and how often product designs are sent to SAP Business ByDesign. For example, a product design may automatically be sent to SAP Business ByDesign as soon as it is released in the external engineering system; product designs may be sent at a particular time every day; or a product design may only be sent when triggered by a user in the external engineering.
The setting for integrating SAP Business ByDesign with an external engineering system are made in your solution configuration. Configuration settings are normally performed by an administrator. If you do not have the required authorization, contact an administrator.

1. Go to the Product Development work center, then choose the Product Designs view.
2. To display product designs created from an external engineering system and sent to SAP Business ByDesign, click Advanced.
3. Under Source Information, the system displays fields in which you can search for product designs according to the following criteria:
   - CAD Integration
   - Engineering Design ID
   - Engineering Design Version ID
   - Engineering Design Status
   Enter the search criteria and click Go.
   The system displays product designs that match your search criteria. You can now work with these product designs.

You cannot change every field in a product design created from an external system. This is because the content of certain fields is overwritten when an update is received from the external engineering system.

If you change the values in the fields Product Design Description or Employee Responsible for a product design version, the system copies the new information to all product design versions with the same product design ID.

Work with Tasks, Notifications, Alerts, and Clarification Requests

For more information about working with tasks, notifications, and alerts, see here.

For more information about working with clarification requests, see here.

Export Business Data Using Microsoft Excel

You can export different types of data from the SAP Business ByDesign system to Microsoft Excel.

For more information about this tasks, see Export Business Data Using Microsoft Excel

See Also

File Input Quick Guide
4.2 Business Background

4.2.1 Product Designs

Overview

The Product Designs view is part of the following work centers:

- Product Development
- Product and Service Portfolio
- Planning and Production Master Data

A product design allows you to group information about a product manufactured or designed by your company before the design is released for use in follow-on processes, such as production. It contains engineering information about the product and can exist in one or more versions.

Each version of a single product design usually corresponds to a product with the same fit, form, and function.

Once you have released a product design it can be used as the basis for the creation of a new production bill of material (PBoM).

You may wish to make changes to the design of a product, or to develop a new product for a number of reasons; for example, in response to a customer request, to meet new legal requirements, or to reduce costs.

You create a new product design when you develop a new product, replace a product, or develop a new version of a product for production in addition to the original product. Therefore, it is possible to create multiple product design versions of the same product design. The first time you create a new product design the system creates a product design with the version 1. Following product design versions that relate to the same product design are numbered sequentially allowing you to keep track of related product design versions more easily.

Creating Product Designs

A product design can be created in two ways:

- A design of a product, for example, a CAD drawing (also called engineering design) is created in an external engineering system. Information about this engineering design is then sent to the system where a corresponding product design is created. When changes are made to the engineering design, the product design can be updated accordingly.
- A product design is created manually in the system.

Engineering Design in an External Engineering System

If engineering design activities are carried out in an external engineering system, it is important that business users are informed of the current status of the design and can give their feedback. It is particularly important that business users have access to the most up-to-date information, if, for example, the change to the product makes it necessary to reconfigure manufacturing equipment resources, which may take a long time.

These changes can be reflected by creating a new product design from scratch or they can be made in a corresponding engineering design. For example, the engineering drawing of the product (also called a viewable) may be changed, one or more of the components used in the engineering design may be changed, or quantity changes may be made to the components of the engineering design. These changes must then be reflected in the corresponding product design version or a new product design version must be created.

A product design makes engineering data from an external engineering system available to business users and can be used to merge different designs. For example, if the engineering designs for two different assemblies that are
used in the same product come from two different engineering systems, they can be merged into one product design in Product Development.

Information Contained in a Product Design

A product design can contain some or all of the following information:

- A list of components used in the product design
- Information about the source of the product design
- Information about the products represented by the product design
- A list of production BoMs based on this product design
- A list of product design versions that use the product design as a sub-component
- A list of product design versions that relate to this product design
- Status of the design
- Responsibilities
- Notes
- Attachments (such as engineering drawings)
- Validity and creation dates

Structure of a Product Design Version

Each component of a product design version is a reference to another product design version. For example, the product design version which describes the product Office_Chair_001 refers to the product design versions describing the components of the chair: Seat_001, Base_001, and Arms_001.

A product design version can have one or more product assignments. If this is the case only one of the assigned products is identified as the default product. This is then the default material for handover activities, such as a transformation into a production bill of material.

The product design Mountain Bike contains the following product designs as components:

- Frame
- Front Wheel
- Rear Wheel
- Gear Shift
- Handle Bar

The product design Gear Shift is itself an assembly consisting of the product designs Chain, Gear, Chain Ring, and Lever as components and may be used in several different product designs.

Fixed Versioning and Validity Date Based Versioning

The assemblies and parts used in a product design version are represented in the product design version as component product design versions. Fixed Versioning and Validity Date Based Versioning are business options that control the way in which you can select these component product design versions, and are selected in your solution configuration.

Configuration settings are usually performed by an administrator. If you do not have the required authorization, contact your administrator.

To find these business options, go to the Business Configuration work center and choose the Implementation Projects view. Select your implementation project and click Edit Project Scope. In the Scoping step of the project, ensure that Product Engineering is selected within Product Development. In the Questions step, expand the Product Development scoping element and select Product Engineering. Select Product Design and answer the questions related to sub-level components used in your product structure.
Fixed Versioning

If you have chosen **Fixed Versioning** in your solution configuration, you must specify a particular version of a product design when adding component product design versions to your product design version. If there is more than one version of the product design, the system proposes the latest valid version of a product design. You can then change this entry to another version, if you require.

It is not possible to change a component product design version that is used in a product design unless the parent product design still has the status **In Preparation**. If the parent product design no longer has the status **In Preparation** and you want to change the component version it is necessary to create a new product design version.

A product design for the product **Bicycle** has the component product designs **Saddle**, **Frame**, and **Handlebars**. The product design for the component **Saddle** exists in versions **Saddle 1**, **Saddle 2**, and **Saddle 3**. When you add the component **Saddle** to the structure of the product design version, the system proposes **Saddle 3**, which is the latest valid version. You can accept the version proposed by the system, or you can choose one of the other versions for use in the product design.

Validity Date Based Versioning

If you have chosen **Validity Date Based Versioning** in your solution configuration, you can work with validity dates. In contrast to **Fixed Versioning**, this makes it possible to update parent product designs at any time by choosing from a list of component product design versions that have valid dates.

If you do not enter a **Valid From** date when you create a product design or product design version, the system sets the date to the date on which the product design (version) is released.

A product design for the product **Bicycle** has the component product designs **Saddle**, **Frame**, and **Handlebars**. The product design for the component **Saddle** exists in versions **Saddle 1**, **Saddle 2**, and **Saddle 3**. The version **Saddle 1** is valid from 8th June 2003 and the version **Saddle 2** is valid from 9th September 2006. The version **Saddle 3** is valid from 1st January 2011. Before 1st January 2011 it is possible to choose between **Saddle 1** and **Saddle 2** and to update the parent product design accordingly. From 1st January 2011 it is also possible to choose **Saddle 3**.

Automated Actions for Product Designs

In the **Automated Actions** view of the **Product Development** work center, you can automate the product design process allowing creation, editing, deletion, and scheduling of automatic mass data runs for different product design tasks.

You can automate your product design process using two mass data runs. With the **Product Design Consistency Check Run**, you can view and schedule the pre-delivered run to repair inconsistent product designs that were created by external CAx systems. With the **Product Design Release Runs**, you can create and schedule the run to release the product design versions and/or convert them to production BoMs.

**Product Design Consistency Check Run**

If product design versions are transferred from an external system in the wrong sequence (for example, the assembly is created before the component), they can be corrected by the product design repair run. Inconsistencies, which are not caused by sequencing issues, cannot be resolved automatically by the **Product Design Consistency Check Run**. The repair run ignores all product design versions which have status **Blocked** or **Obsolete**.

**Product Design Release Run**

With the automated action **Product Design Release Run** you can release and/or convert a complete subtree of product design versions. You maintain a product design version under the **Selection Criteria** of the **Product Design Release Run** editor. The system determines all product design versions which are linked directly, or over several levels as components of the specified product design version. If you have chosen, **Validity Date Based Versioning**,
the latest valid version is used for the calculation of the product design subtree. If the *Release* parameter is selected, the system tries to release all product design versions of the subtree, which have the status *In Preparation* or *In Review*. A product design version can only be released, if all of its components can be released. If the parameter *Convert to Production BoM* is selected, the system creates production BoMs for all product design versions in the subtree, which represent assemblies and which have no Production BoM assigned yet.

If the subtree still contains product design versions which are not yet released, the conversion into production BoMs will not be executed.

You can also specify an ID of an engineering change order under the *Control Parameters* section of the *Product Design Release Run* editor. In this case, all production BoMs will be created with the same engineering change order. If the engineering change order does not exist, it will be created during the run. If you choose an existing engineering change order, you have to ensure that it has the status *In Process*.
5 Automated Actions View

5.1 Quick Guide for Automated Actions (in Product Development)

In the Automated Actions view of the Product Development work center, you can automate the product design process allowing creation, editing, deletion, and scheduling of automatic mass data runs for different product design tasks.

You can automate your product design process using the mass data runs. In the Product Design Consistency Check Run subview, you can view and schedule the pre-delivered run to repair inconsistent product designs that were created by external CAx systems. In the Product Design Release Runs subview, you can create and schedule the run to release the product design versions and/or convert them to production BoMs.

Business Background

Product Engineering

The Product Engineering Business Scenario ensures that designs of your product (including drawings, descriptions, 3D representations) can be managed in SAP Business ByDesign so that you can prepare the production of the product. This includes consistent maintenance of material master data, production bills of material (PBoMs) and other prerequisites for production. This is particularly relevant when your company has a focus on engineering with frequent changes of a product or a high rate of handovers from engineering to production.

- You can create product designs from scratch or import them into SAP Business ByDesign from your external engineering system. In SAP Business ByDesign you can maintain them in order to match production capabilities.
- When released, product designs can be handed over to production and a production bill of material is generated automatically.
- Materials can be assigned to product designs or to the associated production bill of material.
- Production models are generated from the production bill of materials, providing the basis for production.

For more information, see Product Engineering.

Product Designs

A product design allows you to group information about a product manufactured or designed by your company before the design is released for use in follow-on processes, such as production. It contains engineering information about the product and can exist in one or more versions.

Each version of a single product design usually corresponds to a product with the same fit, form, and function. Once you have released a product design it can be used as the basis for the creation of a new production bill of material (PBoM).

You may wish to make changes to the design of a product, or to develop a new product for a number of reasons; for example, in response to a customer request, to meet new legal requirements, or to reduce costs.

You create a new product design when you develop a new product, replace a product, or develop a new version of a product for production in addition to the original product. Therefore, it is possible to create multiple product design versions of the same product design. The first time you create a new product design the system creates a product
design with the version 1. Following product design versions that relate to the same product design are numbered sequentially allowing you to keep track of related product design versions more easily.

For more information, see Product Designs [page 22]

Product Development

The Product Development business scenario provides you with comprehensive functionality to develop new products or to significantly improve the quality of products and processes. Inspired by the Advanced Product Quality Planning (APQP) framework, it covers all important stages from the definition of a product development project to the approval of mass production (and project closure). It covers the planning of a product development project, the engineering and prototyping of a product, the definition of the production process and sample master data, as well as the production of samples and the validation of the production process by continuous improvement. It is a project-structured scenario that includes tools and techniques of Total Quality Management to achieve strategic business results, such as reducing field failure risks, product returns and warranty costs, and ensuring higher customer satisfaction.

Mass Data Runs (MDR)

A Mass Data Run (MDR) is the automatic mass processing of a task or a business transaction. MDRs enable mass processing of business data and are used in business processes, for example, invoice runs, payment authorization runs, or balance confirmation runs. When a user schedules an MDR the system represents it as a background job. During scoping, it is possible to provide default variants of the MDRs.

For more information, see Mass Data Runs (MDR) [page 29].

Tasks

Create a Product Design Release Run

2. Click New to open the run editor.
3. In the General Data section, enter an ID and a description for the run.
4. In the Control Parameters section, select appropriate parameters to update the plan including:
   - Release
   - Convert to Production BoM
5. In the Selection Criteria section, specify the product design ID and version ID for the run.
6. Optional: You can choose to activate the run immediately, or you can activate the run at a later time. For example, just before scheduling. Click Set to Active to activate the run immediately.

To activate the run at a later time, select the run you want to activate in the Automated Actions view, click Actions, and then choose Set to Active.

7. Click Save and Close to return to the Automated Actions view.

Schedule a Run

1. Choose the Automated Actions view in the Product Development work center.
2. Under Automated Actions, select one of the following subviews:
Product Design Consistency Check Run
Product Design Release Runs

3. Select the run that you wish to schedule.

   Before scheduling the Product Design Release Run, you must click Actions and then choose Set to Active to activate your run.

4. Click Schedule and choose Schedule to open the Schedule Run quick activity.

   Alternatively, you can choose Schedule Directly and enter the date and time for your run.

5. Under Schedule, select one of the following scheduling options:
   - Start Immediately – to execute the run immediately.
   - Run After Job – and then select a particular job. The run will be executed immediately after the specified job has been completed.
   - Single Run – and set a date and time for the run.
   - Recurrence – to start the run at regular time intervals. In the recurrence list, choose a recurrence for the run. For example, daily, weekly, or monthly.

6. Click Save and Close to return to the Automated Actions view.

   If required, you can click View Jobs to open the Job Monitor for All screen and view all scheduled runs and their execution details.

Edit a Product Design Release Run

1. Choose the Automated Actions view in the Product Development work center.
3. Select the run that you wish to edit.
4. Click Edit and maintain settings as appropriate.
5. Click one of the following:
   - Save and Close – to save the run and close the run editor
   - Save – to save the run
   - Close – to close the run editor
   - Schedule – to schedule the run
   - Set to Active – to activate the run

Export Business Data Using Microsoft Excel

For more information about this task, see here [page 7].
5.2 Business Background

5.2.1 Mass Data Runs (MDR)

Overview

A Mass Data Run (MDR) is the automatic mass processing of a task or a business transaction. MDRs enable mass processing of business data and are used in business processes, for example, invoice runs, payment authorization runs, or balance confirmation runs. When a user schedules an MDR the system represents it as a background job. During scoping, it is possible to provide default variants of the MDRs.

MDRs are created and maintained in the work centers. Using the Job Scheduler, users schedule the run to execute once or regularly at specified times.

In the Background Jobs view of the Application and User Management work center, you can monitor and reschedule MDR jobs that are created by users in other work centers.

Mass Data Run Features

- MDRs can be created, updated and scheduled by an end user. Scheduling can be done once, with a recurrence pattern (including factory calendar support), or event-based as a follow-on activity after an other MDR. You can also initiate a run to start immediately from the work center.
- With MDRs, you can automate repetitive business tasks or activities, for example, batch jobs that are run at night when there is low activity in the system. MDRs are useful for defining asynchronous, long-term, resource-consuming jobs such as overnight runs and mass printing.
- You can define the amount of control and automation in MDRs. For example, you might automatically release outbound requests for certain customers, while for others you might manually check the information before releasing it.
- The system automatically schedules parallel work packages to speed up the processing time for a MDR.

Mass Data Run Process Flow

Mass data runs can be created by end users in the individual work centers. The following steps explain the typical processes for creating an MDR and scheduling it as a job. During this process, you access the work center, and the Job Scheduler.

1. The user creates or schedules a new MDR in their work center, entering a unique name in the Mass Data Run ID field, and defining parameters for the run. For example, in the Outbound Logistics work center, the user selects Automated Release and then creates a new MDR.
2. In the generic Job Scheduler, the user can start the MDR immediately, or schedule it to run at a specific time, or be triggered by a specified event:
   - Time based: The MDR can be scheduled to run immediately in the background, to run once at a particular date and time, or can be scheduled as a recurring event.
Do note that processing of mass data runs in the background adversely affects the performance of your system. SAP recommends that the MDRs are scheduled to run at a minimum frequency of every four hours. The frequency can be reduced to one hour in case it is absolutely essential. We do not recommend scheduling of mass data runs at any frequency under one hour.

- Event based: The MDR is triggered to run after another job has completed.

3. At any time, you can monitor, reschedule or cancel the background job related to the MDR from the Background Jobs view in the Application and User Management work center. The Background Jobs view allows the you to view all jobs in the system.

4. The user can go to the Application Log for any MD run to view the time and status of each run and to verify any errors, warnings and messages. When an error occurs during a mass data run execution, there may be a business impact. The user can refer to the application log messages to find the exact cause of the error.

**Mass Data Runs**

In the following table you can see some of the various MDRs that can be defined in the system, and the work centers that they are defined in.

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6 Reports View

6.1 Product Designs - Where Used

Overview

This report provides an overview of all product design versions and their relevant assigned products, production bill of material and parent product designs.

Views

The following views are available with this report:

- **Product Design - Where Used - Products**
  Shows which products are represented by a particular product design version.

- **Product Design - Where Used - Production BoMs**
  Shows which production BoMs are created based on a particular product design version.

- **Product Design - Where Used - Parent Product Designs**
  Shows which parent product design versions that use this product design version as a sub-component.

  Only those parent product design versions one level higher in the hierarchy are displayed.

Features

Running the Report

Before running the report, you can specify the data you want to see by making value selections for variables. You must make a value selection for all mandatory variables. In the system, mandatory variables are indicated by an asterisk (*).

Additional information is available for the following selected variables:

- **Product Design Description**
  Language-dependent field used to describe some basic information about a Product Design.

- **CAD Integration**
  Field representing if a product design version is created from CAD integration.

- **Used In Production BoM**
  Used to identify if Production BoMs have been created based on a product design version.

Analyzing the Report

You can use the following key figures to analyze the information in this report:

- **Counter**
  Shows Product Design Version's number of entries.

- **Parent Product Design Version Base Quantity**
  Shows the Base quantity for the parent product design version.

- **Base Quantity**
Shows the minimum quantity a product design represented product will be produced or used in a single operation.

To further analyze data in this report, you can drag characteristics to rows and columns.

From this report, you can navigate to:

- Material Overview

See Also

Reports View
Overview of Reports in Supply Chain Management
Overview of Data Sources in Supply Chain Management