

# sophisTex Solutions eXtended Change Management (XCM)

Solution Overview Version 2025.5  
eXtended SAP S/4HANA Change  
Record Functionality & Conversion  
from PLM7 Engineering Record





# sophisTex | Overview

technical & functional focus

*since  
2012*



## Expertise

- (E)PPM
- PLM
- PDMI/Integration
- Workflows, BTP
- SAP ERP & S/4HANA
- ABAP and Fiori



## Team

- 40 employees
- 30+ full-stack developers



## Focus Areas

- SAP PLM & PPM
- Add-on solutions & integrations
- Full-stack development
- SAP S/4HANA Transformations



## Our Work

- 50% Solution & Maintenance
- 50% Customer Projects & Enablement

## SAP Certified

Integration with RISE with SAP S/4HANA Cloud



# sophisTex | Locations





## STX Add-on solutions

SAP S/4HANA  
Add-on  
**Extended  
Search+**

SAP PLM  
Add-on  
**SAP PLM 7  
Document  
Control+**

SAP PLM  
Add-on  
**Generic Recipe  
Calculations  
(GRC)**

SAP PPM/EPPM  
Add-on  
**PPM Process  
Package (PPP)**

SAP S/4HANA  
PLM  
Add-on  
**eXtended  
Change  
Management  
(XCM)**

SAP PDMI  
Add-on  
**PDMI Extension  
Suite**

Technical  
Framework  
**SAP PLM 7  
Developer  
Frameworks**

Technical  
Framework  
**Customer  
Attributes**

Technical  
Framework  
**Context Menu  
Control**

Technical  
Framework  
**Floorplan  
Manager View  
Control**

Technical  
Framework  
**STX UI5 Libraries**

## STX Technical Concepts



sophisTex  
eXtended Change  
Management  
(XCM)

A powerful add-on  
to extend the  
Change Record of  
SAP S/4HANA  
following the  
Clean Core  
principle

# XCM | Solution Overview



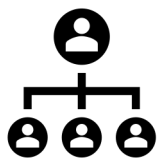
**Advanced Process Route**

An extended process control framework simplifies your processes



**Process Builder**

Simulates the end-to-end process before it gets started and allows you to add tasks and agents



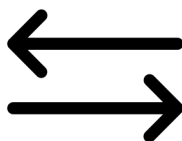
**Agent Determination**

Allows determination by parameter value and business org. hierarchy



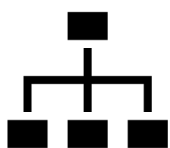
**Dynamic Field Control**

Handles field and button properties by various header fields



**Migration Cockpit**

Offers transformation of ER data to CR data



**Transform ACM Hierarchy**

Migrates ACM hierarchy to T&R



**S/4HANA CR & MDG-M Integration**

Integration of CR with MDG-M to streamline the Material Creation / Change process

# PLM CR with Custom Field using Key User Extension



Key User

Create Custom Field

Adapt UI

Design your screen fields

**SAP** Change Record ▾

**XCM demo presentation**  
800000042

Record Type: Extended Change Management (XCM) Record Status: **Initiate CR (10)** Change Responsible: 4 Total Objects: 10  
Change Number: Change Execution Status: New (60)

Change Number Status: —  
Priority: Medium (3)  
Expected Completion Date: —  
Authorization Group: —  
Change Number Reason for Change: —  
Reason for Change: Standard (STD)  
Effectivity Type: —

Material  
Specification  
Document  
Recipe

General Information ▾ Descriptions Progress Items ▾ Reference Objects Classifications Attachments Hierarchy Log Process Routes Comments Change Documents Process Builder

**Administrative Data**

Business Parameters		Customer Data	
Division: Research & Development (01)	Affected Plant: Bavaria (0003)	Customer: Mercedes Benz (1001)	Part Number: apple cider (11)
Region: Asia / Pacific (AS)	Affected Plant 2: —		
Lead Plant: sophisTex Heidelberg (0001)			

Last Changed By: Created On:  
Created By: Changed On:  
Created By: Last Changed By:

Custom fields  
are added to  
the CR Header



# Process Route: Solution

Set up the Standard Process Route Customizing



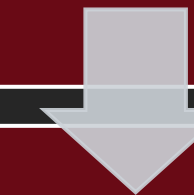
Define all possible Process Tasks with Business Parameter



Define the Tasks per status based on CR Header context



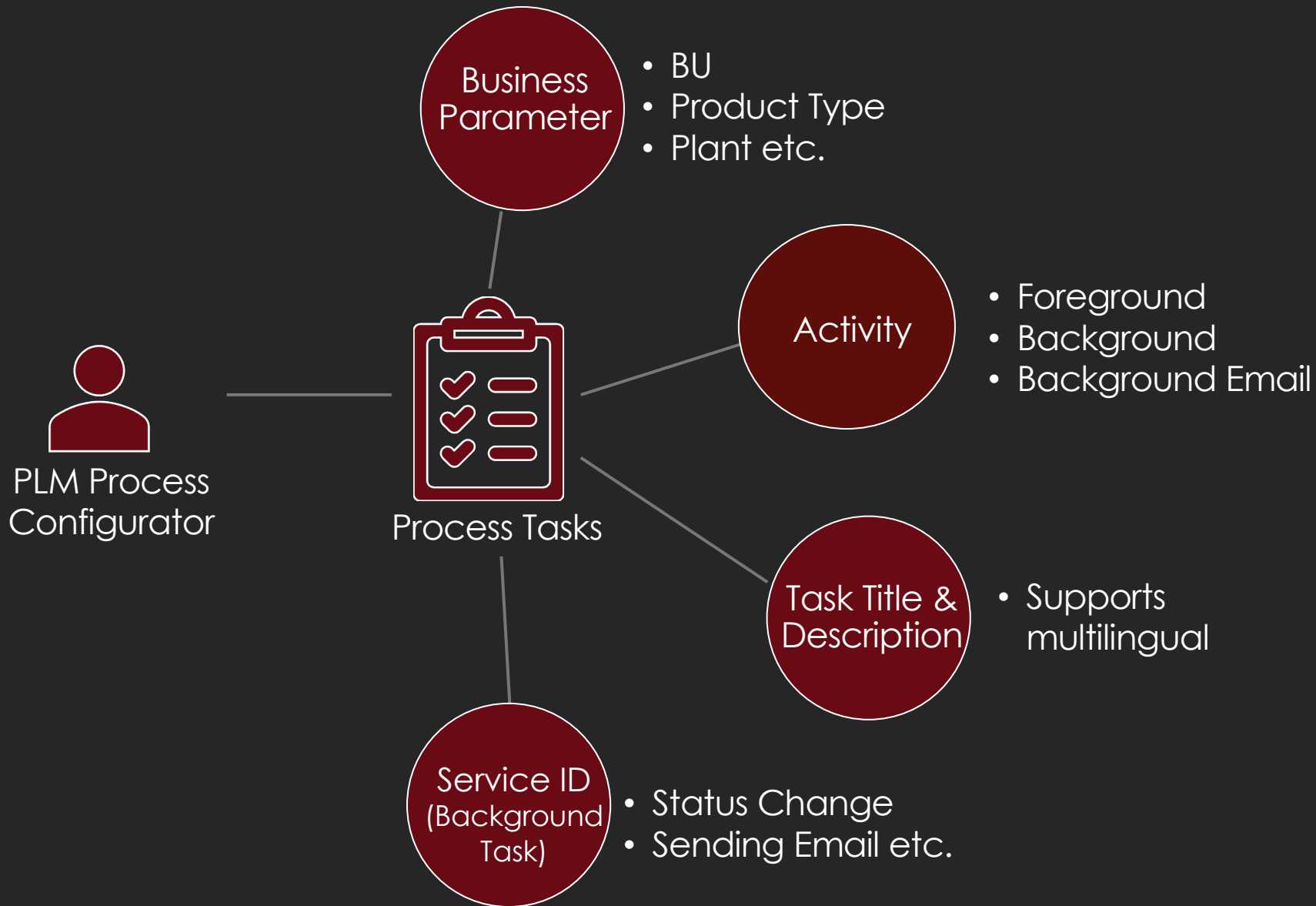
Define the Status determination rule as per CR Header context and Task decision



Activate the XCM Global Process Route Template

# Process Route: Define Process Tasks

- XCM enhances the functionality of the Process Route Item’s “Activity” by introducing a new semantic element called “Task ID.” This element can include a Task Subject and Task Description, both supporting multiple languages. Additionally, it offers the option to reference tasks using parameters.
- The PLM Process Configurator allows organizations to define all necessary Process Tasks tailored to their specific Change Management requirements.



Task ID	Task Subject	Task Desc	Activity	Service ID	Parameter name	Is Email Task?
MASTER_C	Material deregistration	Material deregistration			PLANT	
REWORK	Review and Complete	Review and Complete				
STATUS_CHG	Change CR Status	Change CR Status	S_CR_STC	STATUS_CHANGE		



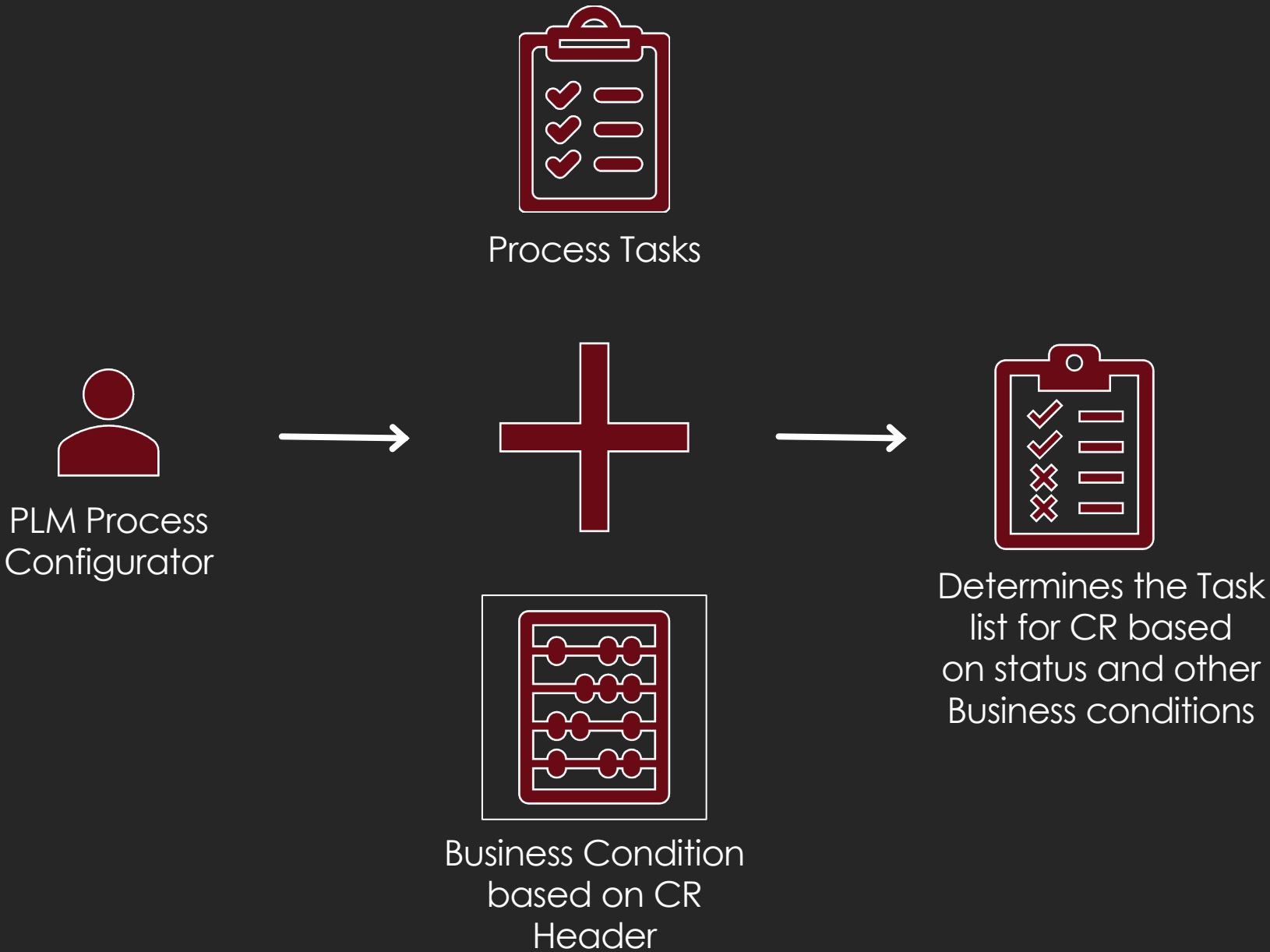
# Process Route: Configure Process Tasks per status

The **PLM Process Configurator** defines the list of tasks for each status using BRF+ rules.

- Tasks are configurable per status, based on the context of the Change Record Header.
- Task sequencing can be specified, with options to execute tasks sequentially or in parallel.
- Each task includes a designated Agent Type and specific Agent.
- Tasks can be marked as optional to deactivate them for Change Records.

**Advantages of the BRF+ Rule Approach over the Template Method:**

- Simplifies simulation and validation of tasks determined by status and business criteria.
- Keeps templates streamlined by eliminating the need to create multiple templates for different business scenarios.
- Empowers the Business Team, such as Admins or Key Users, to configure tasks directly in production, reducing reliance on IT resources.



CR Type	Status	Decision	BU	Plant	Task	Sequence	Agent Type	Agent	Optional
S01	10		BU01	0110	MASTER_C	1			
S01	11				REWORK	1			

# Process Route | Solution in Detail



## **Generic Process Route Template is created which is linked to all status of the CR**

- ✧ Sequential – Background task for task creation
- ✧ Sequential – Background task for next status



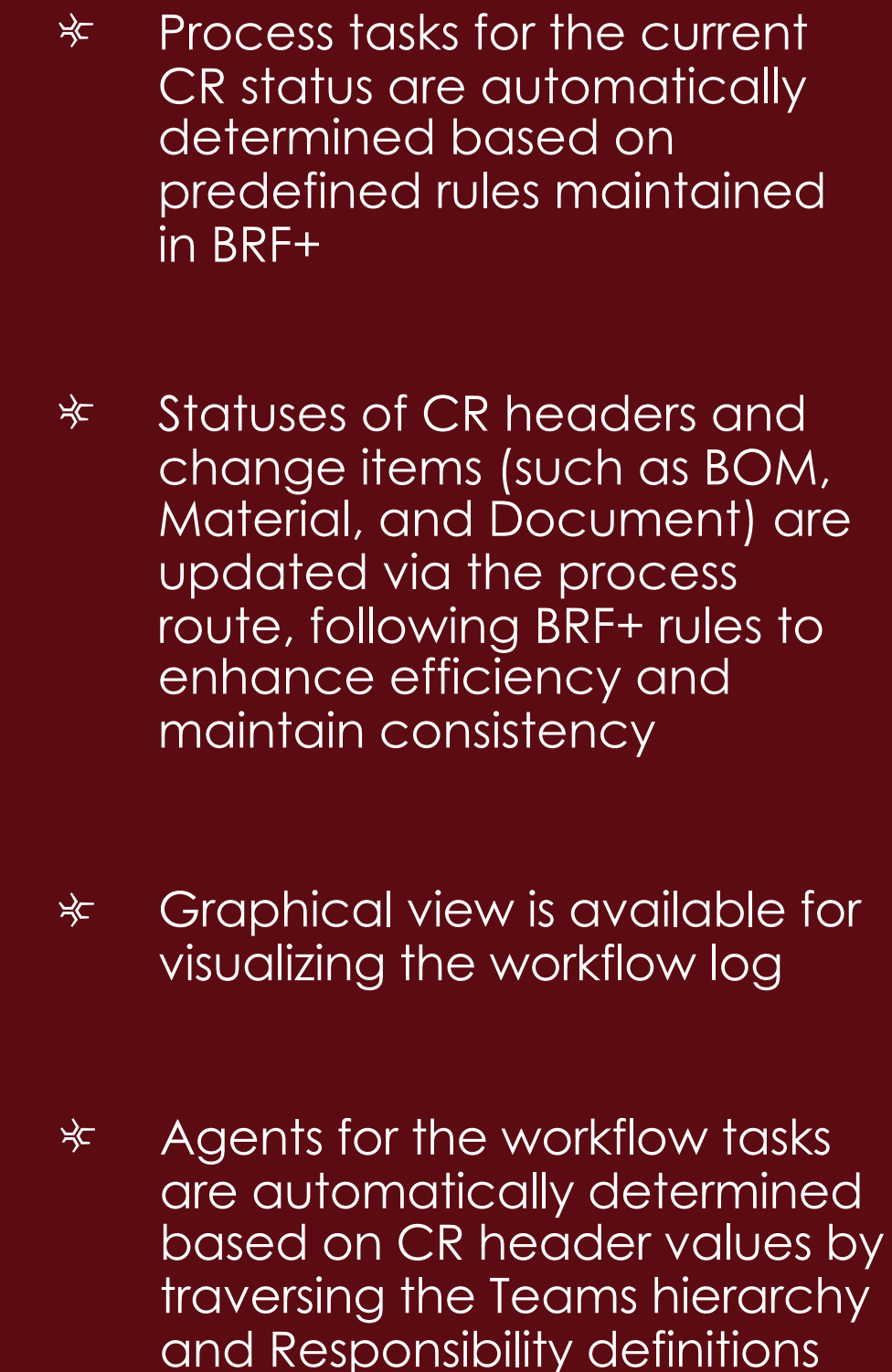
## **Background task for task creation**

- ✧ Generic implementation reads XCM BRF+ Rules for “Tasks per status”
- ✧ Creates tasks required for the status based on results of the BRF+ Rules by passing all the relevant header fields
- ✧ Business parameters are available in CR Header, reading parameters is achieved in the service function by passing data to the process route



## **Agent Determination**

- ✧ Task parameters defined for a task are used to identify agents from Teams and Responsibility Management (T&R) by navigating through the Teams hierarchy



<

SAP

Change Record ▾

800000042

XCM demo presentation

800000042

General Information ▾

Descriptions

Progress

Items ▾

Related Objects

Classifications

Attachments

Hierarchy

Log

Process Routes

Comments

Change Documents

Process Builder

Edit

Change Status

Process Builder

Workflow

Merge

Split

Copy Change Record

Related Apps

🔗 ▾

Migrated CR will have the option to display the log of process from ER

Process Routes

📘

All changes made to the process route are saved automatically.

✕

Save Template

🔄

⚙️

↺

📅

🔗

Process Tasks	Task Subject	Note	Status	Latest End Date	Progc. Time (Days)	Priority	Task Responsibility	Approved User	Decision	Record Status	
▼ Header											🔍 + ⋮
System (Background)	BG Service Function for CR Task Creation		Completed			Very high				Initiate CR (10)	🔍 + ⋮
Change Coordinator	Submit and Initiate the Change Approval process	View	Completed				Business Unit – Research & Development (01)	Jayanth, Deepthi (JAYANTH)	Submit	Initiate CR (10)	🔍 + ⋮
System (Background)	BG Service Function for CR Status Change		Completed			Very high				Initiate CR (10)	🔍 + ⋮
System (Background)	BG Service Function for CR Task Creation		Completed			Very high				Change Request in Review (20)	🔍 + ⋮
▼ Parallel Steps											🔍 + ⋮
Development Manager	Validate and Design Proposal for this Change	Change					All Parameter				🔍 + ⋮
▼ Design Engineer	Review the Design Proposal Changes.	Change					All Parameter				🔍 + ⋮
Development Manager	Review the Design Proposal Changes.	Change					All Parameter				🔍 + ⋮
System (Background)	BG Service Function for CR Status Change	Create				Very high					🔍 + ⋮

Migrated CR will have the option to display the log of process from ER

Graphical view is available for visualizing the workflow log

Agents for the workflow tasks are automatically determined based on CR header values by traversing the Teams hierarchy and Responsibility definitions

Migrated CR will have the option to display the log of process from ER

**Test the migration data**

Process Routes

All changes made to the process route are saved automatically.

Process Tasks	Task Subject	Note	Status	Latest End Date	Prog. ...	Priority	Task Responsibility	Approved User	Decision	Record ...
Header										

**Process Log**

Activity Type	Activity Description	Workitem ID	WorkItem Status	Decision	Decision Comment	Completed By	ER Status	Workitem Created on	Workitem Completed on
Dialog	Engineering Record Dialog	7009	✓	Approved		Deepthi Jayanth	Change Inquiry (Initial) (ST - 10)	2025-12-01	2025-12-05
Background	ER Background Service Function	7014	✓			System	Change Inquiry (Initial) (ST - 10)	2025-12-01	2025-12-05
Dialog	Engineering Record Dialog	7019	✓	Approved		Deepthi Jayanth	Change Request in Process (ST - 20)	2025-12-05	2025-12-05
Background	ER Background Service Function	7024	✓			System	Change Request in Process (ST - 20)	2025-12-05	2025-12-05
Dialog	Engineering Record Dialog	7031	✓	Approved		Deepthi Jayanth	Change Request Approved (ST - 30)	2025-12-05	2025-12-05
Dialog	Engineering Record Dialog	7032	✓	Approved		Deepthi Jayanth	Change Request Approved (ST - 30)	2025-12-05	2025-12-05
Background	ER Background Service Function	7033	⚠				Change Request Approved (ST - 30)	2025-12-05	



# Process Exception Handling

- ✧ Process exception and Agent Exceptions are captured during background processing
- ✧ In case of missing customizing or error in data, process exception is handled and task created to Admin to fix this issue
- ✧ In case of missing Agent, Agent exception is handled and task created to Admin to fix this issue
- ✧ Once Admin fixes and resumes the task, the background task which ended in exception is resumed again and completed

Issue Type	User Status 1	Exception Type	Exception Scenario	Task ID	Agent type	Agent
<input checked="" type="checkbox"/> =XCM (Extended Change Management)	<70	=NA (No Agent)	=01	NO_AGENT_EXP	TF (Team Function)	TFAGT_EX_ADM (Agent Exception Administration)
<input type="checkbox"/> =XCM (Extended Change Management)	<70	=PE (Process Exception)	=02	PROCESS_EXCEPTION	TF (Team Function)	TFAGT_EX_ADM (Agent Exception Administration)
<input type="checkbox"/> =XCM (Extended Change Management)	<70	=PE (Process Exception)	=01	PROCESS_EXCEPTION	TF (Team Function)	TFAGT_EX_ADM (Agent Exception Administration)
<input type="checkbox"/> =XCM (Extended Change Management)	<70	=PE (Process Exception)	=01	MDG-M_CR_EXP	TF (Team Function)	TFAGT_EX_ADM (Agent Exception Administration)

**Process Routes**

All changes made to the process route are saved automatically.

Process Tasks	Task Subject	Note	Status	Latest End Date	Proc. Time (Days)	Priority	Task Responsibility	Approved User	Decision	Record Status
Header										
System (Background)	BG Service Function for CR Task Creation		Completed			Very high				Initiate CR (10)
Agent Exception Administration	Handle Exception of Task in XCM Process Control	Change	Work Item Sent			Very high	All Parameter			
System (Background)	BG Service Function for CR Task Creation	Create				Very high				
System (Background)	BG Service Function for CR Status Change	Create								

**Process Route Workflow Log**

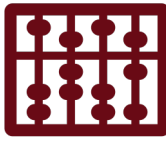
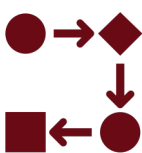
Work Item ID	Status	Created On	Completed On	Executed By	Action	Message
000000023438	Completed	Fri Oct 24 2025 17:29:43 GMT+0530 (India Standard Time)	Fri Oct 24 2025 19:30:01 GMT+0530 (India Standard Time)	SAP_WFRT	Background work item created	No errors occurred -> Details in long text
					Result Processing	No errors
					Work Item Processing Complete	No errors
					Execution started automatically	No Tasks identified for the CR in status
					Execution started automatically	Check your configuration or contact Admin
					Execution started automatically	No Tasks identified for the CR in status
					Execution started automatically	Change record header and extension 0000000000800000011 with status 10 retrieved.
					Execution started automatically	No errors occurred -> Details in long text
					Workflow exit is activated	Exit class 'CL_SRM_WF_PATH_WI_EXIT' activated

Exception Task created while creation failed

When Error is identified with process of agent, exception is handled

Error log of WorkItem shows why exception created

Background processing of workflow



BRF+ Rule identifies who should be addressed for such exception



Admin receives task to address the exception occurred

Task resumes once Admin fixes the issue and sets the task to continue

More details

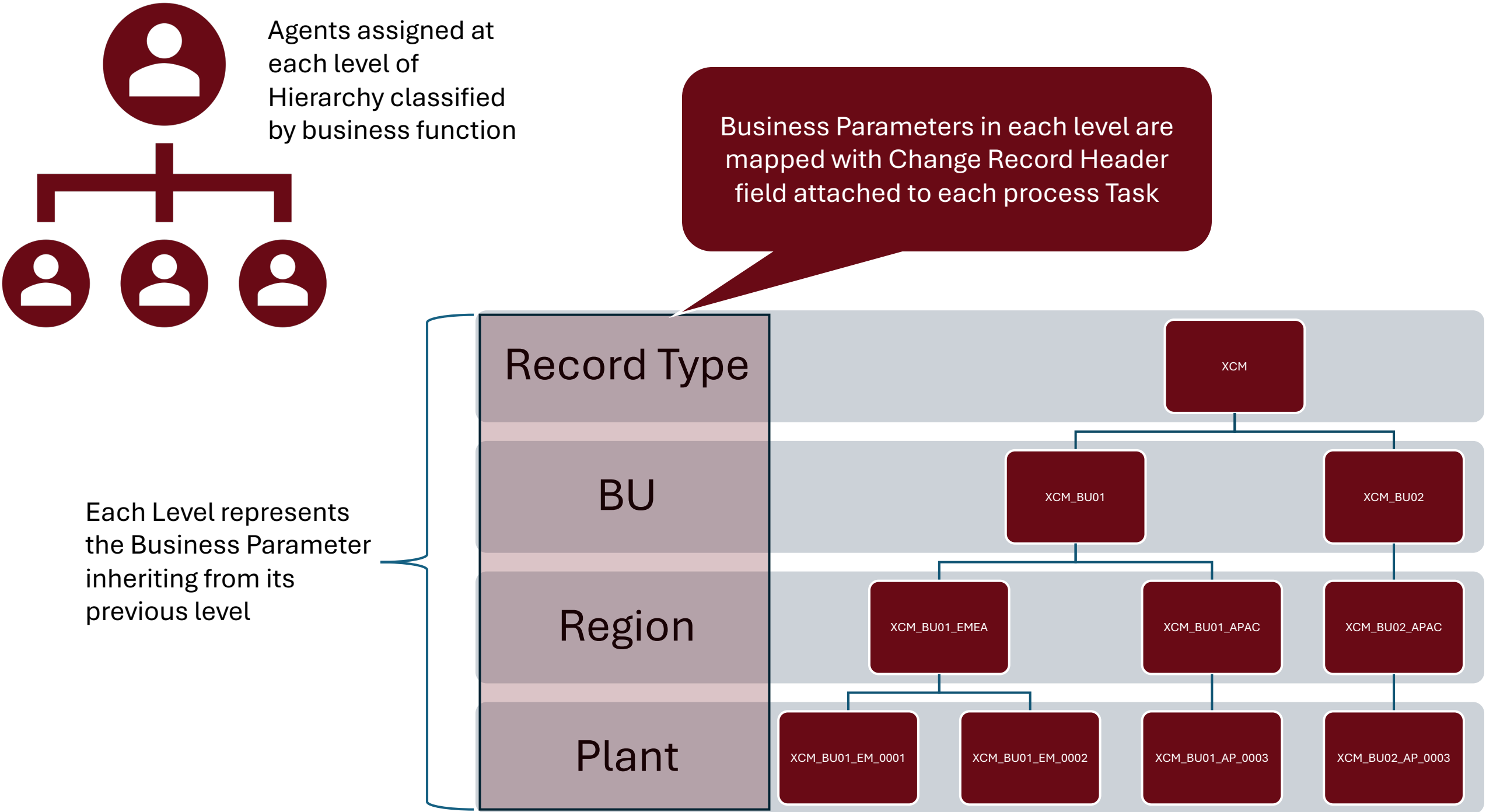


[Exception Handling in Process Control](#)

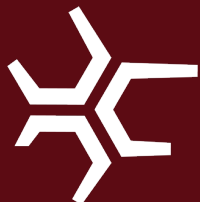




# Extension on Teams and Responsibility

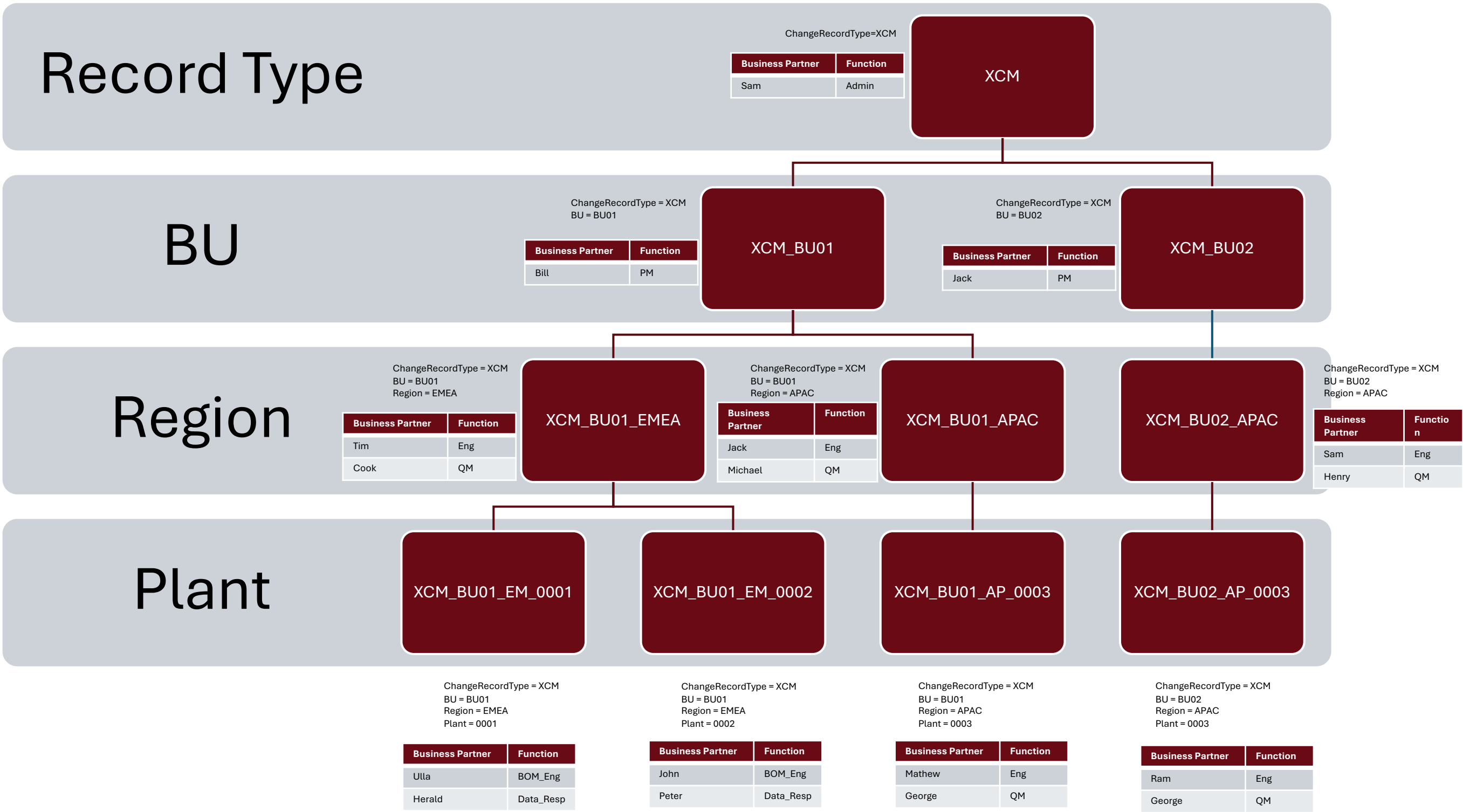


- ✧ XCM Prefers to use the Standard Teams and Responsibility for Defining Agents in Org Hierarchy
- ✧ Business Parameter is extended to Teams with its Responsibility Definition feature
- ✧ Agent Determination is extended by XCM to identify the leaf of the hierarchy based on Business Parameter Hierarchy
- ✧ Supports the user to understand from which Teams the agent was identified



# Teams Hierarchy – Agent Determination on Leaf Level

- ✧ Sample Hierarchy with Agent assigned against the right function
- ✧ Agent is determined based on most matching parameter
- ✧ Identifies leaf of each hierarchy level to fetch the right agent





- SAP

Manage Team Hierarchies

Standard

Name:

=S02\_ROOT X

Description:

Status:

Type:

Category:

Go Adapt Filters (1)

Teams

Show ListManage Sub TeamsCreate

Name	Description	Status	
S02_ROOT	S02_Change_record_type	Enabled	
S02_ROOT_01	S02_01	Enabled	
S02_ROOT_01_AS_AF	S02_01_AF and AS	Enabled	
S02_01_AF_AS_0001_0003	S02_01_AF_AS_0001 and 0003	Enabled	
S02_ROOT_02	S02_02	Enabled	
S02_ROOT_02_AM	S02_02_AM	Enabled	
S02_02_AM_0002	S02_02_AM and 0002	Enabled	
S02_ROOT_03	S02_03	Enabled	
S02_ROOT_03_EU	S02_03_EU	Enabled	
S02_03_EU_0004	S02_03_EU and 0004	Enabled	
S02_ROOT_04	S02_04	Enabled	
S02_ROOT_04_AS_AM	S02_04_AS and AM	Enabled	
S02_04_AS_AM_0003_0002	S02_04_AS_AM_0003 and 0002	Enabled	

S02\_03\_EU\_0004

EditCreate SubteamDeleteCopy

Name: S02\_03\_EU\_0004

Description: S02\_03\_EU and 0004

General Information

Responsibility Definitions

Team Owners

Team Members

Type: XCM\_CR\_DEMO

Category: Change Record (SCR1)

Responsibility Definitions

Name	Value
ChangeRecordType	=XCM(Extended Change Management) =S02(Prod. Eng. Change)
Z_BusinessUnit	=03(Spare Parts)
Z_Plant	=0004(Baden-Württemberg)
Z_Region	=EU(Europe)

Team Owners

Business Partner	Full Name	User ID
14	BOM Engineer	PLM_TEST02

Team Members

Business Partner	Full Name	User ID	Functions
15	Plant Manager 001	PLM_TEST03	Plant Manager Development Manager
16	Plant Manager 003	PLM_TEST04	Plant Manager
17	Product Manager	PLM_TEST05	QA Analyst Product Owner

Inherited Responsibility from parent level of Hierarchy



# Mass Upload of Teams and Responsibility

- ✧ Existing Org hierarchy or other agent hierarchy (like ACM) could be transformed and uploaded using the Fiori based Mass upload to Teams and Responsibility app
- ✧ Download the Template, either empty or with existing data, for reuse during upload
- ✧ Upload history can be reviewed at any time
- ✧ Data is uploaded asynchronously, creating and updating Teams, and log updated to Application log

**Get Template**

**Created new Upload**

**History of Uploads available to review**

**Upload the Excel File**

**Review the file uploaded**

**Uploaded data segregated by entity**

**Upload Status updated asynchronously**

**More details**

[Mass Creation & Update of Teams Hierarchy via Fiori App](#)





# Process Builder

- ✧ Process Builder is a XCM application designed to simulate end to end process at the start of the CR creation and when process relevant parameter(s) are changed
- ✧ User can simulate and check the process tasks and ensure its consistency to deliver tasks to all the process responsible
- ✧ Also simulates the agent determination with option to add or remove agents
- ✧ Designed and developed to match the Process Route UI, keeping the design of Standard unchanged.

## Simulate Tasks for CR

Simulates tasks for a CR by reading the configuration

## Deactivation of Tasks

User has the option to deactivate optional tasks of configuration for a specific CR

## Add Custom Tasks

Adding of new tasks sequential or parallel possible by the user

## Agent Determination

Simulates the agent determination based on all possible agent sources of Task

## Modify Agents

Additional agents are possible to be added by the user for each specific task and remove existing agents



# Process Builder

- ✧ Sample Simulation showed in diagram
- ✧ You can skip optional tasks by disabling the active task flag for specific CR
- ✧ Task Status shows “Green” if it can be delivered as Work Item, else shows “Red” with Error on mouse over
- ✧ Single Task by parameter in configuration is multiplied by rule based on the number of values in CR for this parameter.
- ✧ Task is differentiated as “Dialog”, “Background” or “Info Email” using icons in Process Tasks column

Parameter specific to task is displayed if task has Responsible

Tasks grouped by Status of CR

Task Status highlights if Task is active and without error for WorkItem to be delivered

Task multiplied based on parameter with multi value

Task can be made inactive if optional in BRF+ rule

Process Tasks	Task Subject	Note	Task Responsibility	Due Days	Priority	Task Status	Active Task	Actions
Header								
Initiate CR (10)								
Change Coordinator	Submit and Initiate the Change Approval process	Change	Business Unit = Research & Development (01)	0 days		Green		
Re Work (11)								
Change Record Creator	Review the rejection reason and resubmit for approval	Change		0 days		Green		
Change Request in Review (20)								
Parallel Steps								
Development Manager	Validate and Design Proposal for this Change	Change	All Parameters	0 days		Green	Active	
Design Engineer	Review the Design Proposal Changes.	Change	All Parameters	0 days		Green		
Development Manage	Review the Design Proposal Changes.	Change	All Parameters	0 days		Green	Active	
In Design Changes (30)								
Parallel Steps								
Plant Manager	Review the Change Request and send for further approval	Change	Plant = sophisTex Heidelberg (0001)	0 days		Green		
Plant Manager	Review the Change Request and send for further approval	Change	Plant = sophisTex Bangalore (0002)	0 days		Green		
CR in Implementation (40)								
S02_ROOT_01_AS_AF	Review Implementation Changes and Approve	Change		0 days		Green		
Review Required (50)								
Parallel Steps								
Product Owner	Review and Approve Design and Implementation change	Change	All Parameters	0 days		Red	Inactive	
QA Analyst	Validate the Implementation and Design changes	Change	All Parameters	0 days		Green		
Global Review and Close Change (60)								
Project Leader	Final Review of Change Request	Change	All Parameters	0 days		Green		

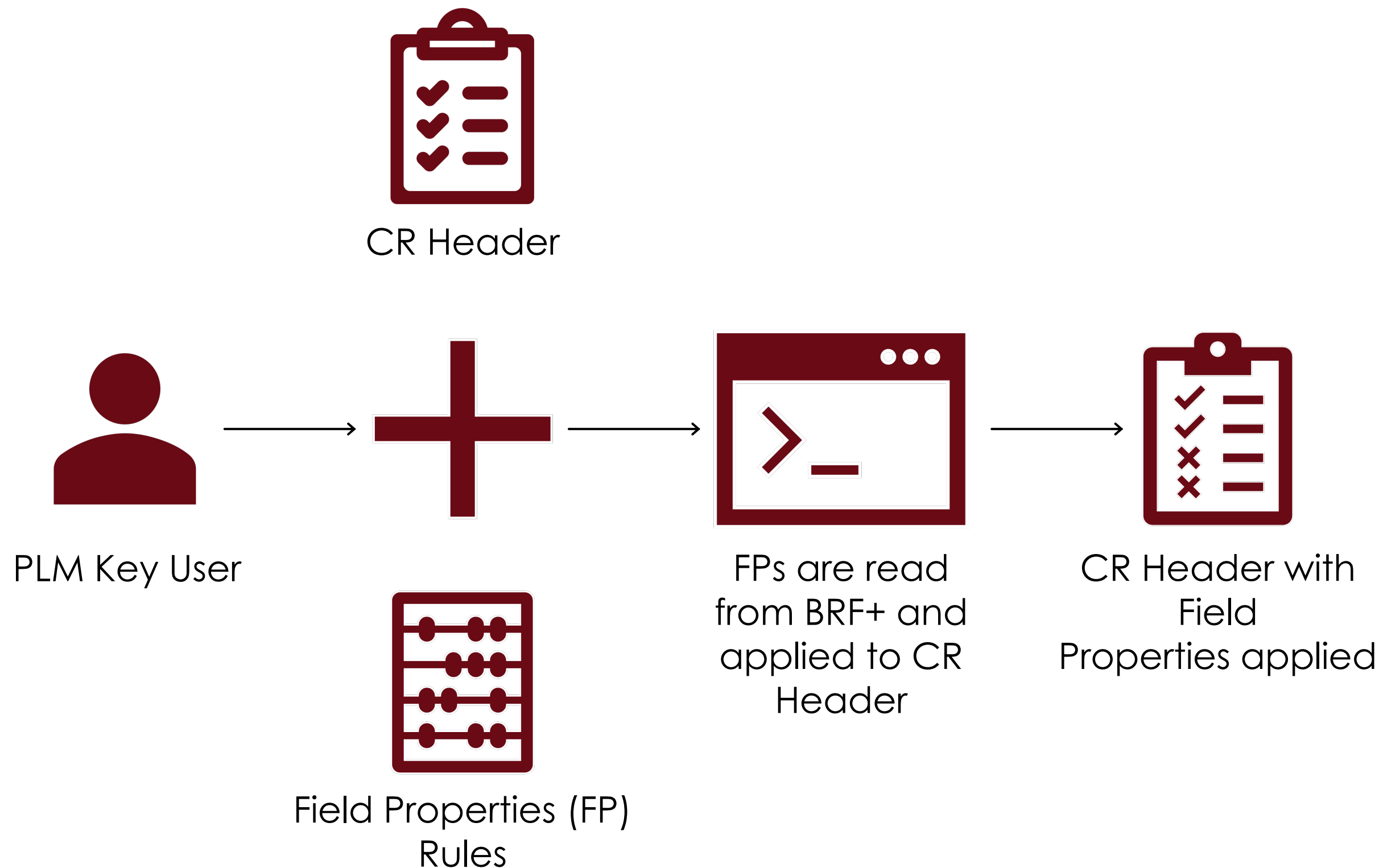
More details

[Process Builder](#)



# Dynamic Field Control

- ✧ Standard Dynamic field property feature is restricted to handling field control by Status and Record Type
- ✧ XCM Add-on enhanced this with code and BRF+ decision table, enabling the key users to maintain the rule without any code
- ✧ PLM key user defines field properties in the BRF+ decision table based on CR header attributes
- ✧ Conditional field properties are supported based on the CR header





- | Record Type                                                           | Record Status | Division | Region | Lead Plant | Affected Plant | Affected Plant 2 | Affected Plant 3 | Change Record Reason | Node Name                  | Field Name             | Field Property       |
|-----------------------------------------------------------------------|---------------|----------|--------|------------|----------------|------------------|------------------|----------------------|----------------------------|------------------------|----------------------|
| <input checked="" type="checkbox"/> =XCM (Extended Change Management) |               |          |        |            |                |                  |                  |                      | FIELDS (CR field property) | ZZ1_CUSTOMER_IRT       | 7 (Field: Mandatory) |
| <input type="checkbox"/> =XCM (Extended Change Management)            |               |          |        | is initial | is initial     |                  |                  |                      | FIELDS (CR field property) | ZZ1_PLANT1_IRT         | 0 (Field: Hidden)    |
| <input type="checkbox"/> =XCM (Extended Change Management)            |               |          |        |            | is initial     | is initial       |                  |                      | FIELDS (CR field property) | ZZ1_AFFECTEDPLANT2_IRT | 0 (Field: Hidden)    |
| <input type="checkbox"/> =XCM (Extended Change Management)            |               |          |        |            |                | is initial       | is initial       |                      | FIELDS (CR field property) | ZZ1_AFFECTEDPLANT3_IRT | 0 (Field: Hidden)    |

## Field control applied based on BRF+ Rule



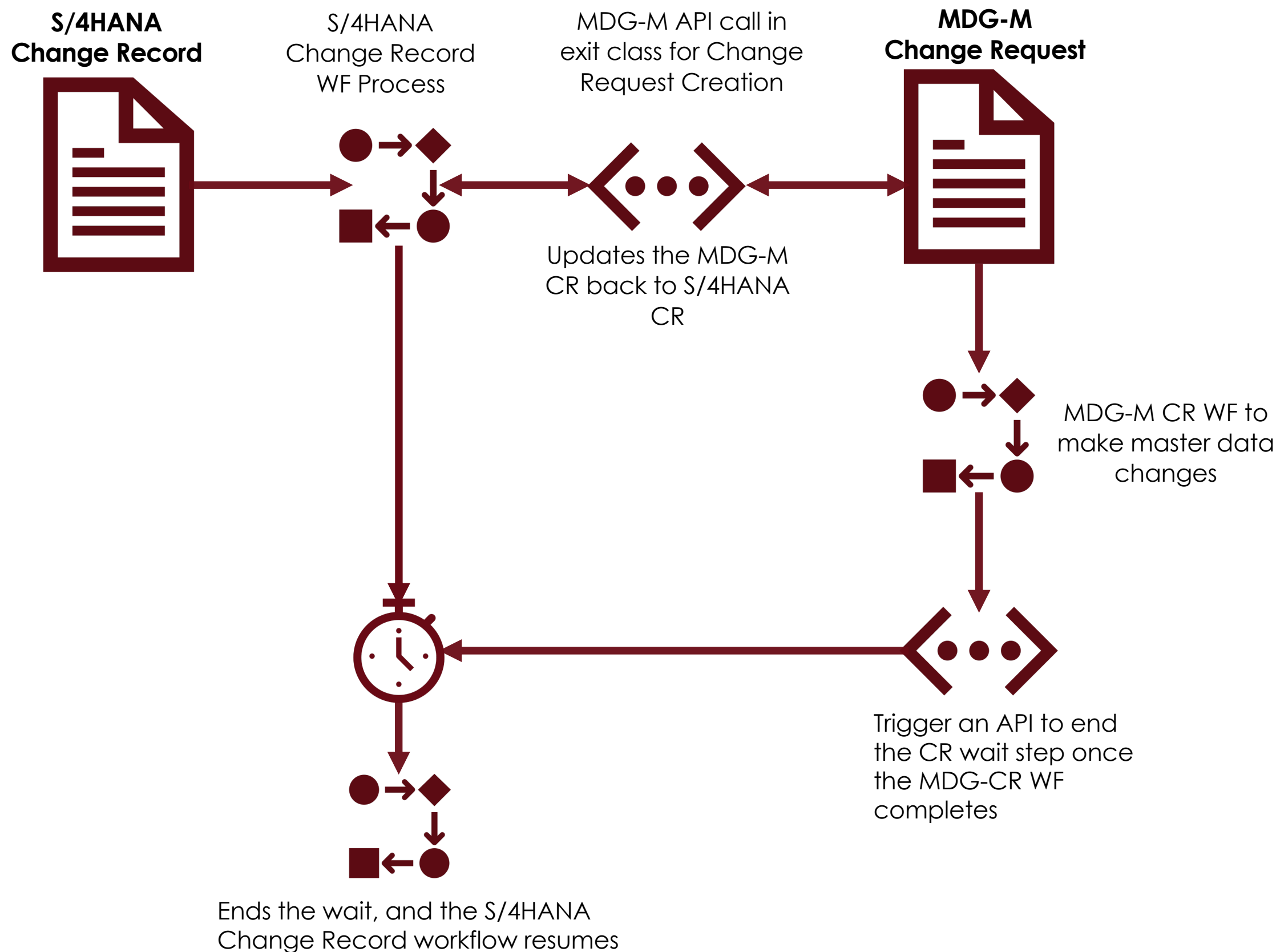
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# S/4HANA CR & MDG-M Integration

- ✧ MDG-M integration with S/4HANA CR is not in standard, its an out of the box feature delivered through XCM
- ✧ MDG-M integration is handled through the Process Route workflow, where XCM tasks can be configured in the desired Change Record status to trigger the MDG-M process
- ✧ After the MDG-M CR is created via API, the CR number is updated back to the Change Record, and a wait step is added to the Process Route
- ✧ On completion of the MDG-M CR Process, an API call ends the wait step and the CR process continues.





- S/4HANA CR Integration with MDG-M**

30001624

General Information | Objects | Classifications | Attachments | Hierarchy | Log | Process Routes | Comments | Change Documents | Process Builder

### Items

#### Document

Image	Document	Document ...	Document ...	Document V...	Document Status	Relevance
No items available.						

### Material

#### Materials (3)

Image	Material	Material Type	Material Base Unit	Material Status	Relevance	Processing Status	MDG Request Number
	PLACE HOLDER				Create	Initial (00)	162501624
	butter 58	Semifinished Product (HALB)	Kilogram (KG)		Reference	Initial (00)	
	egg 59	Semifinished Product (HALB)	Kilogram (KG)		Change	Initial (00)	162701625

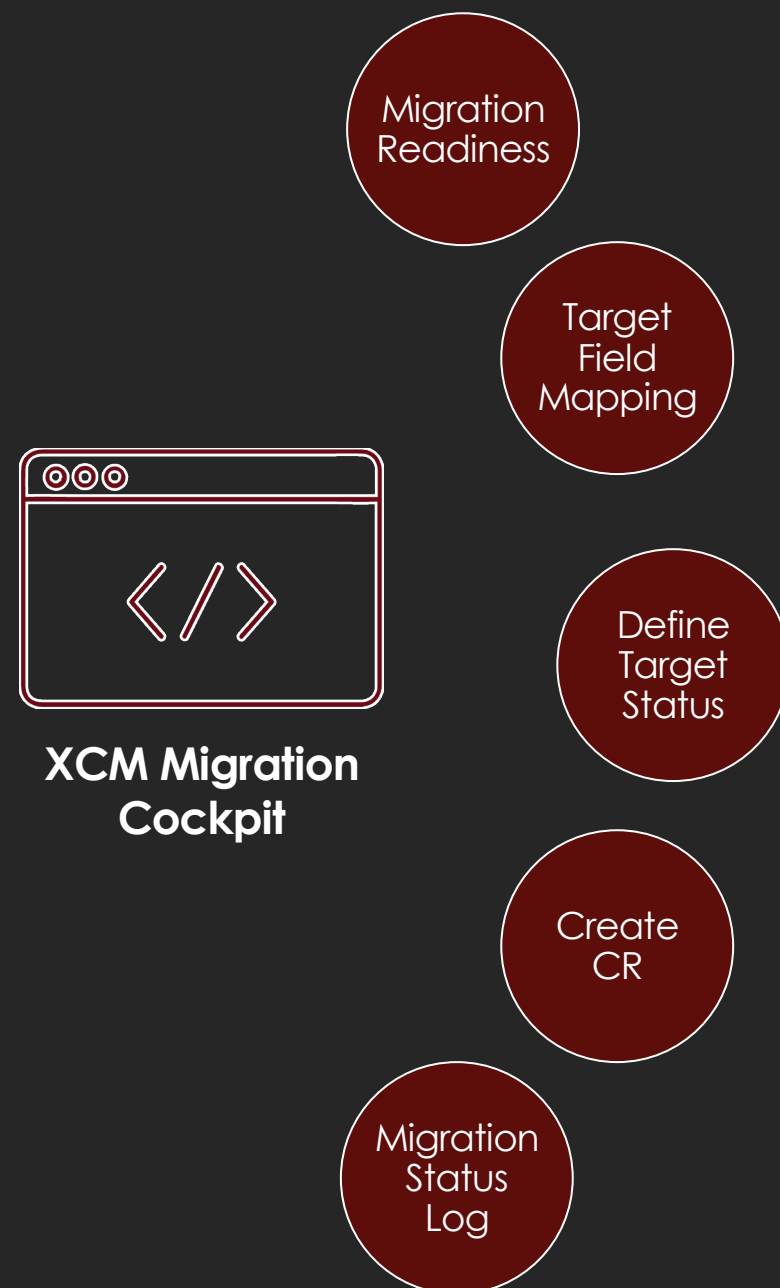
### Process Routes

Process Tasks	Task Subject	Note	Status	Last	Decision	Record Status
Header						
System (Background) <a href="#">Change Record Responsible</a> (CR Responsible)	XCM Service Function - CR Task Creation Review and submit the Change Record for Approval	<a href="#">View</a>	Completed			Initiate CR (10)
Parallel Steps						
<a href="#">Reg. Lifecycle Management</a> (Team Function)	Review and Approve the Design Changes	<a href="#">View</a>	Completed	All Parameter	Jayanth, Deepthi (JAYANTH)	Approval decision Initiate CR (10)
System (Background)	Send Info Email	<a href="#">View</a>	Completed			Initiate CR (10)
System (Background)	XCM Service Function - CR Status Change		Completed	Very high		Initiate CR (10)
System (Background)	XCM Service Function - CR Task C		Completed	Very high		Change Request in Review (20)
Parallel Steps						
<a href="#">Development Manager</a> (Team Function)	Review and Approve the Design Changes	<a href="#">View</a>	Completed	All Parameter	Jayanth, Deepthi (JAYANTH)	Approval decision Change Request in Review (20)
System (Background) <a href="#">MDG-M Admin User</a> (Team Function)	BG Service Function for MDG-M Creation Approve this task on completion of MDG-M Process	<a href="#">View</a> <a href="#">Change</a>	Completed Work Item Sent	All Parameter		Change Request in Review (20)
Parallel Steps						
<a href="#">Change Responsible</a> (Team Function)	As a Reviewer Engineer, perform the Review	<a href="#">Change</a>		All Parameter		
<a href="#">Design Reviewer</a> (Team Function)	Review and Approve the Design Changes	<a href="#">Change</a>		All Parameter		
System (Background)	XCM Service Function - CR Status Change	<a href="#">Create</a>		Very high		



## S/4HANA CR integration with SAP MDG-M

# Migration Cockpit – Component Diagram



Migration readiness checks provide a summary of the readiness

- ✧ If ER workflows have started and tasks are approved, the ER isn't ready for migration unless the user confirms and reinitiates the process from the current status.
- ✧ If the ER workflow hasn't started or no tasks are approved, it is ready for migration, creates the CR and loads the corresponding route at the CR level.

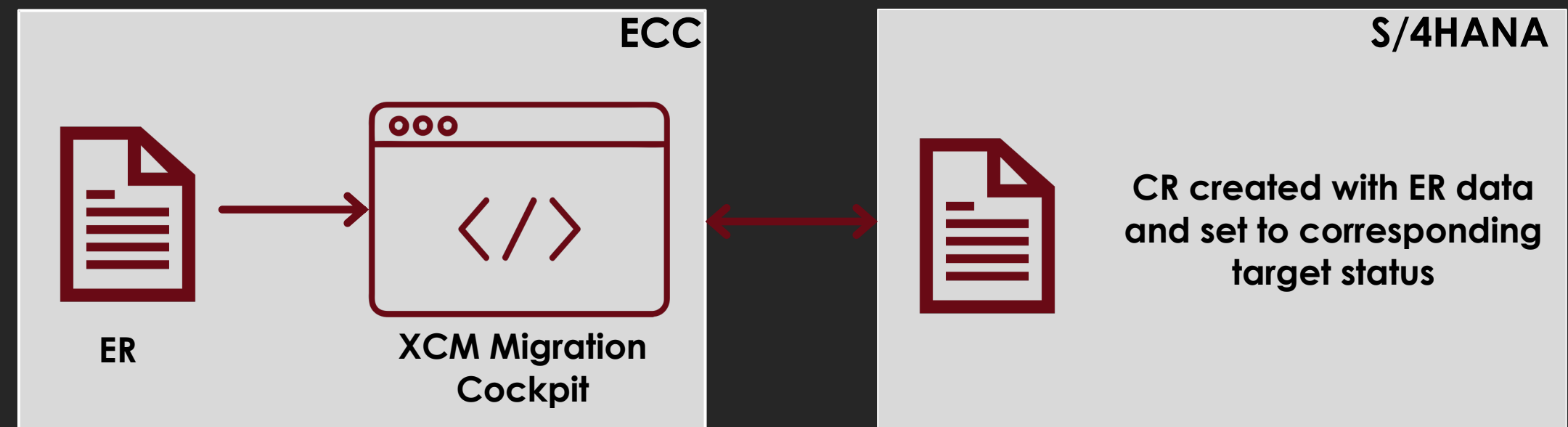
Target field mapping provides the mapping to ER and CR custom fields

Target status provides the ER to CR status mapping when status nets differ

Once all validations are successful, the CR is created

Migration status is updated back to the XCM Migration Cockpit to provide a summary of migration, reprocess tasks, and prevent duplicate CR creation.

XCM Migration Cockpit also offers on-demand migration through a custom button at the ER level, allowing authorized users to migrate a specific ER to CR at any time.



# Migration Cockpit

Migration can be done for selected record using the filter in Migration Cockpit

Search

All filter \*  
Engineering Record Type: ECRD  
Engineering Record:   
ER Status:   
Created by:   
Change Responsible:   
CR Status:   
Migration Status: Completed  
Mark for Migration:   
Enable process migration:

ER to CR Migration Logs

Migration Read...	Engineering Re...	Engineering Recor...	Migration Status	ER Status	CR Status	Mark for Migrat...	Copy Process	Created by	Change Respo...	Migrated by	Migration Started on	Migration Updated on	Change Record...
<input type="checkbox"/>	38	ECRD	COMPLETED	10	Change Request in Revi...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EEPA	KONETI	01.12.2025	01.12.2025	30001579	
<input type="checkbox"/>	39	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH		EEPA	23.06.2025	23.06.2025	1000638
<input type="checkbox"/>	40	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EEPA	EEPA	JEEVA	25.07.2025	25.07.2025	1000660
<input type="checkbox"/>	41	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EEPA		JEEVA	25.07.2025	25.07.2025	1000661
<input type="checkbox"/>	56	ECRD	COMPLETED	30	Change Request in Revi...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JAYANTH		JEEVA	20.08.2025	20.08.2025	1000749
<input type="checkbox"/>	60	ECRD	COMPLETED	60	Review Required (50)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH		JEEVA	20.08.2025	20.08.2025	1000738
<input type="checkbox"/>	61	ECRD	COMPLETED	60	Review Required (50)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JAYANTH		KONETI	02.12.2025	02.12.2025	30001594
<input type="checkbox"/>	63	ECRD	COMPLETED	20	Change Request in Revi...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH					
<input type="checkbox"/>	64	ECRD	COMPLETED	10	Change Request in Revi...	<input type="checkbox"/>	<input type="checkbox"/>	KONETI	KONETI				
<input type="checkbox"/>	66	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH					
<input type="checkbox"/>	69	ECRD	COMPLETED	30	Change Request in Revi...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JAYANTH	KONETI	JEEVA	20.08.2025	20.08.2025	1000740
<input type="checkbox"/>	72	ECRD	COMPLETED	30	Change Request in Revi...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	EEPA	HUSSAIN	11.08.2025	11.08.2025	1000691
<input type="checkbox"/>	76	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	JAYANTH	JAYANTH	15.05.2025	15.05.2025	1000581
<input type="checkbox"/>	77	ECRD	COMPLETED	20	Change Request in Revi...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	KONETI	JAYANTH	15.05.2025	15.05.2025	1000582
<input type="checkbox"/>	88	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	JEEVA	JAYANTH	15.05.2025	15.05.2025	1000577
<input type="checkbox"/>	91	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	JEEVA	JAYANTH	15.05.2025	15.05.2025	1000579
<input type="checkbox"/>	100	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EEPA		POOJA	01.12.2025	01.12.2025	30001581
<input type="checkbox"/>	114	ECRD	COMPLETED	20	CR in Design Changes (30)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	JAYANTH	JAYANTH	18.08.2025	18.08.2025	1000732
<input type="checkbox"/>	115	ECRD	COMPLETED	10	Change Request in Revi...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	JAYANTH	JAYANTH	18.08.2025	18.08.2025	1000733
<input type="checkbox"/>	117	ECRD	COMPLETED	10	Initiate CR (10)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAYANTH	EEPA		02.12.2025	02.12.2025	30001614
<input type="checkbox"/>	119	ECRD	COMPLETED	40	Review Required (50)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	POOJA	JAYANTH		05.12.2025	05.12.2025	30001616

Information of migrated data

Change Record

Test the migration data

30001616

General Information

Administrative Data

Business Parameters

Customer Data

Migration Data

Last Changed By:

Created On:

Migrated On:

Created By:

Changed On:

Created By:

Last Changed By:

Change Record

Test the migration data

30001616

Process Routes

Process Log

Activity Type	Activity Description	Workitem ID	Workitem Status	Decision	Decision Comment	Completed By	ER Status	Workitem Created on	Workitem Completed on
Dialog	Engineering Record Dialog	7009	✓	Approved		Deepthi Jayanth	Change Inquiry (Initial) (ST - 10)	2025-12-01	2025-12-05
Background	ER Background Service Function	7014	✓			System	Change Inquiry (Initial) (ST - 10)	2025-12-01	2025-12-05
Dialog	Engineering Record Dialog	7019	✓	Approved		Deepthi Jayanth	Change Request in Process (ST - 20)	2025-12-05	2025-12-05
Background	ER Background Service Function	7024	✓			System	Change Request in Process (ST - 20)	2025-12-05	2025-12-05
Dialog	Engineering Record Dialog	7031	✓	Approved		Deepthi Jayanth	Change Request Approved (ST - 30)	2025-12-05	2025-12-05
Dialog	Engineering Record Dialog	7032	✓	Approved		Deepthi Jayanth	Change Request Approved (ST - 30)	2025-12-05	2025-12-05
Background	ER Background Service Function	7033	⚠				Change Request Approved (ST - 30)	2025-12-05	

Process Information is migrated and shown as log on demand

More details







# Features availability matrix – PLM7 ER vs S/4HANA CR vs CR+XCM

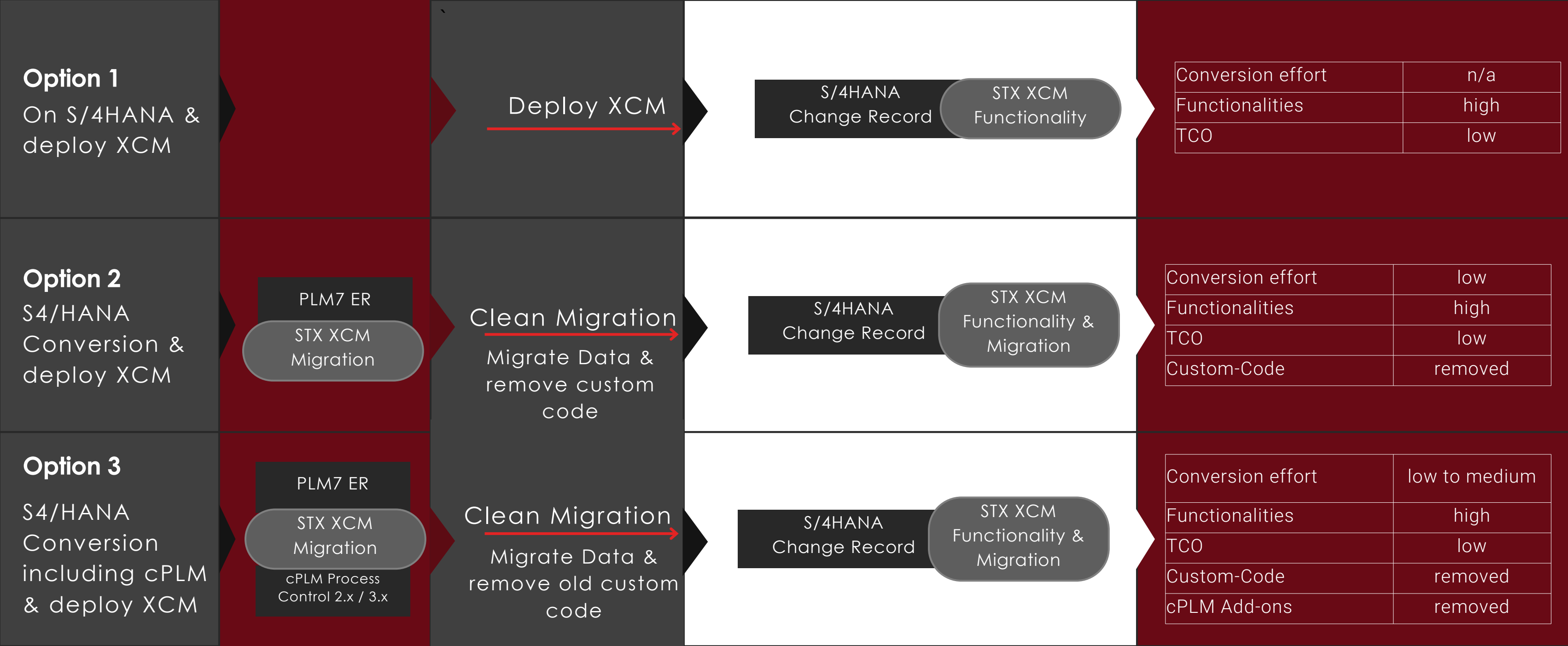
*\* SAP Standard offers Team and Responsibility(T&R) Management, within the standard, only the CR Type parameter supported*  
*\*\* Team and Responsibility enabled to support multiple parameters to determine Teams, Functions, and Team members, additionally supports the Teams hierarchy*

Feature	PLM7 ER - Standard	PLM7 ER + cPLM	S/4HANA CR-Standard	S/4HANA CR + XCM
Custom Fields on header area	Yes	Yes	Yes	Yes
Dynamic Field Control via BRF+	Limited to ER Type	Yes	Limited to CR Type	Fully Dynamic Possible
Auto-determine Process Route Templates for CR Status and other fields	No	Yes	Yes	Yes (But only Process tasks are determined, no templates required)
Process Route Background Tasks	No	Yes	Yes	Yes
Process Route tasks with Parameters	No	Yes	No	Yes
Task Multiplication (create same task for different plants or for other parameters)	No	Yes	No	Yes
Approval Decision Exits	No	Yes	No	Yes
Status Transition with BRF+	No	Yes	Yes	Yes
Process Route Simulator	No	Yes	No	Yes (Displays PR Steps and Agents from T&R)
Teams & Responsibility (T&R)	No	Yes, via ACM Parameters	Yes, via SAP Standard T&R, limited options*	Yes, full flexibility**
UX Experience & Performance	Old WDY screens with slow backend logic	cPLM ACM slows down further ER performance	SAP Fiori (Modern, stable, device agnostic)	SAP Fiori UX with CDS & RAP scalable solution
ER to CR Migration	-	-	No	Yes, with different Migration options



# Deployment Options: Full Flexibility

Supports S/4HANA Transformations.  
Removes Custom Code, Migrates cPLM Data & replaces cPLM functionality.



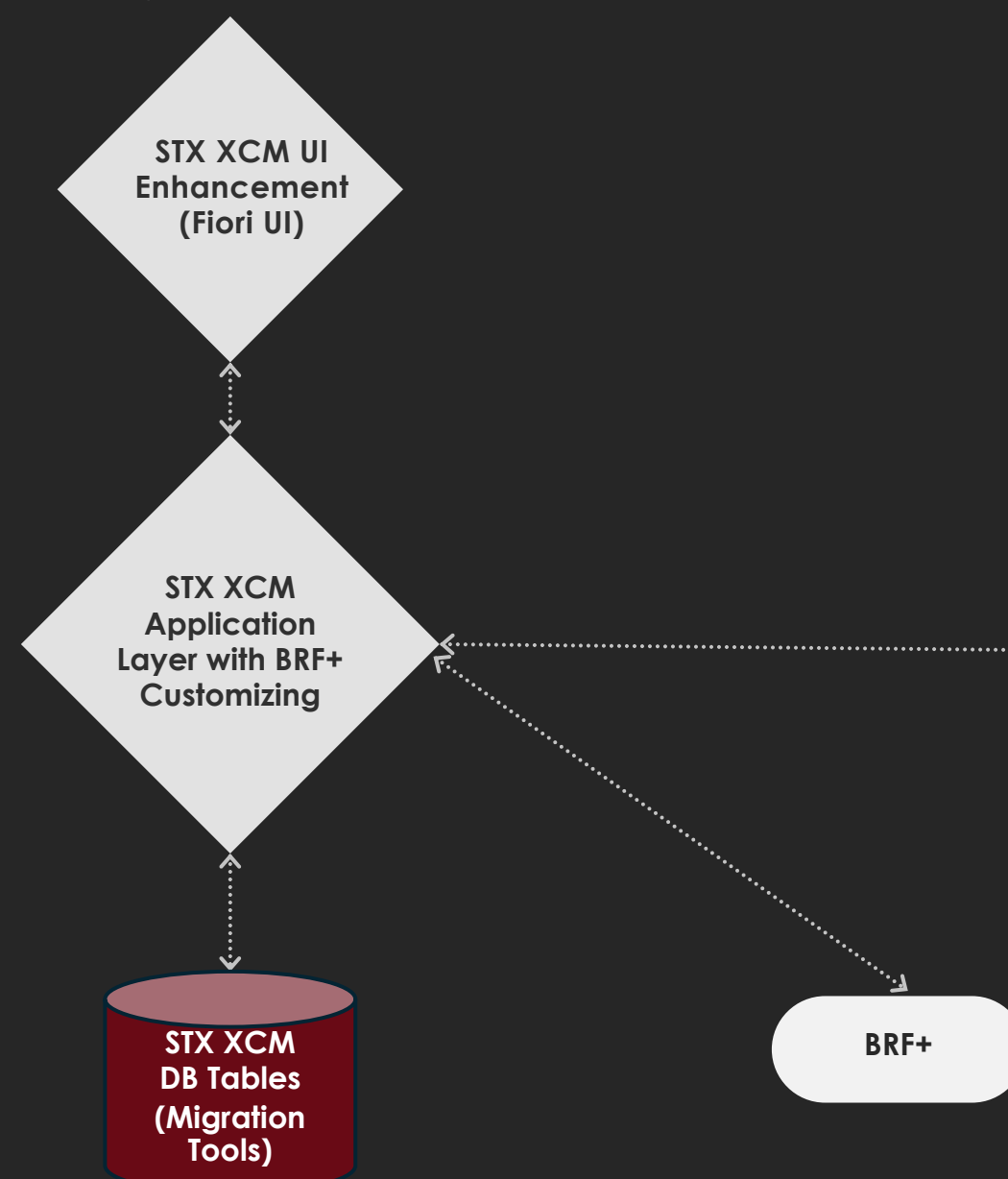


# Technical Architecture

- ✧ STX XCM is technically separated from SAP S/4HANA Standard and certified by SAP\*
- ✧ All add-on functionalities are fully switchable
- ✧ STX database tables for migration functionality
- ✧ Uses SAP BRF+ for configuration
- ✧ Deployment possible on SAP S/4HANA 2023+ and on SAP ECC EhP7+ (ECC only needed for data migration)

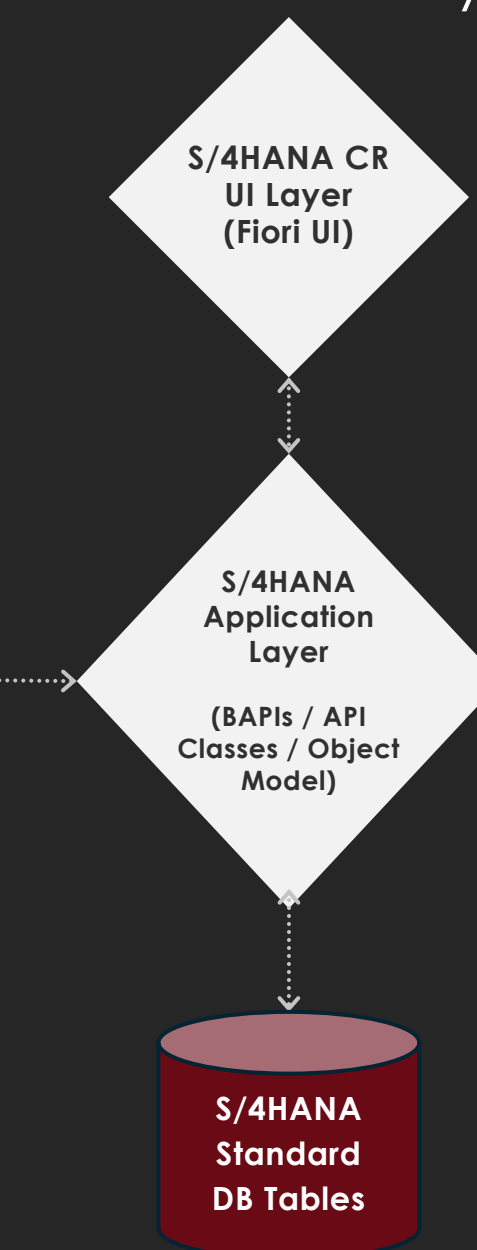
\* SAP certification completed in 2025

## sophisTex XCM Solution



- STX XCM deployed on SAP S/4HANA On-Premise / Private Cloud
- Migration Tools of STX XCM must be deployed on SAP ECC as well

## SAP S/4HANA CR Standard Functionality



SAP Standard Functionality  
on  
SAP S/4HANA On-Premise



# PLM CR with XCM

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## **Seamless Integration with MDG-M:**

The change record integrates smoothly with MDG-M, provides the flexibility to initiate the change process directly from MDG-M by creating the change record or optionally create it from the PLM “Manage Change Record” application based on your requirement

**This integration is partially supported by SAP S/4HANA standard, but XCM Add-On solution provides the bi-directional integration between MDG-M and PLM CR**

## **Optimized Team & Responsibility**

### **Management:**

Existing organizational structures and agent determination functionalities can be seamlessly migrated to S/4HANA Teams and Responsibility Management. This ensures the right process participants are identified, leading to effective decision-making.

**Teams Hierarchy is fully supported by S/4HANA Standard, but Automatic Process participants determination by business parameters is only possible with XCM**

## **Targeted Process Tasks:**

Change management tasks can be assigned at the plant or business unit level, ensuring the right teams are involved for efficient and structured change handling.

**This is fully covered by XCM, standard process route functionality is not very flexible with a pre-configured process route functionality**





# PLM CR with XCM

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## **Modern & User-Friendly Experience:**

The S/4HANA Change Record offers a modern, flexible, and high-performance user experience, enhancing productivity for business users.

**This is fully supported by SAP Standard, but XCM provides additional UIs like process simulation and extended search to enhance the user experience**

## **Comprehensive PLM Integration:**

The change record is tightly integrated with PLM objects such as Material, BOM, and Routing. All impacted objects are maintained in one place, with their statuses automatically updated in sync with the change record's progress.

**Status transition of change items is fully covered by XCM**

**Custom fields can be added to the CR header to personalize the Change Record for your requirement**

**Fully supported by SAP Standard**

*Thank you*

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