Engineering / Parts / Copying parts

COPYING PARTS

This article describes how to copy parts. You can copy a part within the same tenant, or you can copy parts to another tenant within a customer group.

Copy a part

You can copy a part, along with all of the associated records, such as process routings, control plans, specifications, and lot management details. A part copy is associated with a new part number or with an existing part number. If you specify to copy a part to an existing part number, the copied information overwrites the data associated with the target part number.

1. Access the **Parts** screen.

2. Adjust the filters, and click **Search**.

3. In the grid, click the **Part No** link.

4. Click **Part Info** from the side tab panel.

5. On the **Action Bar**, click **Copy,** and then choose one of the following:

   - **Copy to New**

   - **Copy to Existing**

6. If copying to a new part, in the **Copy New Part Detail** dialog box, do the following:

   a. For **New Part No**, type a new part number.

   b. If necessary, for **Revision**, type a revision number.

   c. Select the check boxes for the information that you want to copy to the new part.

   d. Click **Ok.**

7. If copying to an existing part, in the **Copy Existing Part Detail** dialog box, do the following:

   1. If necessary, for **Edit Part Status,** specify a new part status.

   2. For **Existing Part No**, specify the part number to which you want to copy the part information.

   3. Click **Ok.**

   The part information is associated with a new or existing part. The details of the part copy are displayed.

﹀ Configuration requirements

Copy a part to another tentant with Enterprise Part Copy

You can copy a part to another entity in a customer group.

1. Access the **Enterprise Part Copy** screen.

2. Select a **Source PCN** which is the PCN from which you want to copy a part.

3. Select a **Target PCN** which is the PCN to which you want to copy a part.

4. Enter a part number in the **Part No** field.

5. Click **Search**.

6. Select a part in the grid, and select one of the following actions. Note that **Single Copy** and **BOM Copy** are available only for non-lotted parts while **Lotted Part Copy** is available only when you select a lotted part from the grid.
   - **Single Copy:** Use this action to copy a single part and its operations.
   - **BOM Copy:** Use this action to copy the bill of materials for a part.
   - **Lotted Part Copy:** Use this action to copy lot attributes and lot inheritance details for a part.

   > **NOTE:**
   >   - For **Lotted Part Copy**, choose which details to copy in the Lotted Part Copy dialog.
   >   - **Part Details** is selected by default and cannot be cleared.
   >   - **Process Routing** is selected by default and must be selected in order to select **BOM**.
   >   - **BOM** must be selected to copy inheritance details.

7. Review the validation details and correct any errors.

❯ Configuration requirements

Troubleshoot validation issues in Enterprise Part Copy

When you copy a part using the Enterprise Part Copy screen, Plex performs validations to ensure that the target and source PCN share similar settings. If a mismatch is found during validation, the errors are reported in bold red text on the validation screen. Review each section to learn how to work through validation issues.

For Lotted Part Copy:

The validation for copying lotted parts happens in four stages.

1. Details
2. Process Routing and BOM
3. Part Lot Attributes
4. Lot Inheritance

The validation process follows the order listed above. An error in the Details section stops the validation from continuing to the next section, so you will need to correct all errors in the Details section before the validation will move to the next section.

Plex checks the following information, and the validation fails under these conditions.

Details validation fails under these conditions

- Source and target PCN are the same
- Source **Part Revision No** already exists in the target PCN
- Source **Part Group** does not exist in the target PCN
- Source **Part Source** does not exist in the target PCN
- Source **Part Product Group** does not exist in the target PCN
- Source **Part Product Type** does not exist in the target PCN
- Source **Part Type** does not exist in the target PCN
- Source **Part Status** does not exist in the target PCN
- Source **Grade** does not exist in the target PCN
- If the source part is lot required:
  - Source **Lot Format Description** does not exist in the target PCN
  - Source shelf life types (only **Best By**, **Use By**, **Sell By**, and **Retest** will be validated and copied)

- - Source **Unit** does not exist in target PCN

  - Source **Supplier Unit** does not exist in target PCN

- For the following customer settings in the target PCN:
  - When **Part Product Group Required** is enabled in the target PCN, the source PCN must have a value for **Product Group**

  - When **Part Product Type Required** is enabled in the target PCN, the source PCN must have a value for Product Type

  - When **Group Required** is enabled in the target PCN, the source PCN must have a value for **Part Group**

  - When **Part Type Required** is enabled in the target PCN, the source PCN must have a value for **Part Type**

Process Routing validation fails under these conditions

- Source **Operation Code** does not exist in the target PCN

- Source **Operation Type** does not exist in the target PCN

- Source **Part Op Type** does not exist in the target PCN

BOM validation fails under these conditions

- Source **BOM Component** does not exist in the target PCN

- Source **Item** does not exist in the target PCN

- When customer settings of **Bill of Materials**, **Unit Conversion Use**, and the **Unit Conversion** does not exist in the target PCN (matches on **Unit1**, **Unit2**, and **Conversion**)

Part Lot Attributes validation fails under these conditions

- Target **Lot Attribute Template** does not exist (Target Template can be inactive without a validation error)

- Target **Attribute** does not exist (matches on Code and Value Type)

- Target **Active** is different

- Target **Lot Attribute Group** does not exist
  - If Target Template does not exist, then source Group does not exist

  - If Target Template exists, then Groups are the same

- Target **Part Lot Attribute Display Type** does not exist
  - Target **Attribute Value Type** is different

  - Target **Lower Variance Display** is different

  - Target **Upper Variance Display** is different

  - Target **Target Rate Display** is different

  - Target **Boolean Display** is different

  - Target **Active** is different

  - Target **Reference** is different

- Target **Unit** does not exist

- Target **Lot Attribute UAS Validation Type** does not exist

- Target **Lot Attribute Test Method** does not exist
  - Target **Active** is different

- Target **Lot Attribute Test Result** does not exist
  - Target **Result Successful** is different

  - Target **Overridden** is different

  - Target **Active** is different

- Target **Lot Attribute Report Type** does not exist

- - Target **Active** is different

- Target **Lot Attribute Report Display Type** does not exist
  - Target **Actual Value Display** is different

  - Target **Pass Fail Display** is different

  - Target **Ignore** is different

  - Target **Active** is different

Lot Inheritance validation fails under these conditions

- Target **Component Part** is not **Lot Required**

- Target **Component Part** does not have the **Part Lot Attribute**