QAD Adaptive Applications

User Guide

QAD EQMS Applications: Continuous Improvement

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Continuous Improvement User Guide Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference	Changed By
APR 2019/v2019	Initial upload	--	RQT
APR 2019/v2019	Updated terminology	--	RQT
SEPT 2019/v2019	Updated copyright, formatting, and links	--	RQT
JAN 2020/v2019	Updated linkage	--	RQT
OCT 2020/v2020.1	Updated versioning	--	RQT
MAR 2021/v2021	Updated linkage; Added Inbox messages.	p. 72	RQT
MAY 2021/v2021	Added a section for Commands	p. 108	RQT
AUG 2021/v2021.1	Updated versioning; Added Improvement Impacts; Added Improvement Categories; Added Improvements	p. 31, p. 32, p. 61	RQT
FEB 2022/v2022	Updated versioning	--	RQT
SEPT 2022/2022.1	Updated versioning	--	RQT
MAR 2023/v2023	Updated versioning	--	RQT
MAR 2024/v2024	Updated versioning	--	RQT
SEPT 2024/v2024.1	Updated versioning; Changed Project Gates Library to Project Phases Library; Changed Project Types to Project Templates	p. 24, p. 22	RQT
MAR 2025/v2025	Updated versioning	--	RQT
SEPT 2025/v2025.1	Updated versioning; Updated Project Tasks Library; Updated Improvements; Updated Lessons Learned	p. 26, p. 61, p. 66	RQT

Chapter 1

Introduction

Overview

Continuous Improvement is the electronic workstation that manages an organization's daily tasks. It is a project management tool that facilitates meetings as well as organizes and manages projects by creating tasks and assigning responsibilities and due dates. It also allows meetings to be scheduled and facilitated. The Continuous Improvement module automatically notifies individuals of pending tasks, and tasks overdue are automatically escalated to additional employees, ensuring these tasks are completed and do not slip through the cracks.

The Continuous Improvement module includes workflows, which allow specific tasks and roles to be included in project issues. When setting up a workflow library, users create a streamlined set of sequential instructions with a time frame and the option of ad hoc tasks; this library can then be added to an issue.

About This Guide

This user guide focuses on:

- Setup required for the Continuous Improvement module
- Different forms of document organization in the Continuous Improvement module
- Security and roles for the Continuous Improvement module
- Instructions for the various tasks

Note: This guide does not provide field descriptions for the Continuous Improvement module fields. Field help is provided in the software.

Continuous Improvement Module Setup Guide

This section describes the processes of the Continuous Improvement module. The list below is arranged by the order in which the processes should be completed, starting with the setup operations and continuing with the main functions.

Setting Up the Continuous Improvement Module

Workflow Roles

Use Workflow Roles to define a label of a job responsibility specific for a workflow. See "Workflow Roles" on page 15.

Meeting Types

Use Meeting Types to define a logical grouping for meetings and set up the default agenda for a meeting. See "Meeting Types" on page 15.

Issue On Hold Reasons

Use Issue On Hold Reasons to anticipate potential issues and define why they occur. See "Issue On Hold Reasons" on page 17.

Issue Resolutions

Use Issue Resolutions to define a list of resolution codes for when an issue associated with a project is completed. See "Issue Resolutions" on page 18.

Issue Categories

Use Issue Categories to define a logical grouping for issues. See "Issue Categories" on page 19.

Project Templates

Use Project Templates to create a project blueprint. See "Project Templates" on page 22.

Project Phases Library

Use Project Phases Library to define the list of phases that projects typically go through. See "Project Phases Library" on page 24.

Projects Tasks Library

Use Projects Tasks Library to set up library gate information that will eventually become a project task. See "Project Tasks Library" on page 26.

Project Roles Library

Use Project Roles Library to define roles to assign to task responsibility and approval in a project. See "Project Roles Library" on page 30.

Improvements Impacts

Use Improvements Impacts to define a list of impacts that a logged or suggested improvement might affect. See "Improvement Impacts" on page 31.

Improvements Categories

Use Improvements Categories to categorize improvements based on a standard list and set up the default responsibility for an improvement based on site. See "Improvements Categories" on page 32.

Using The Continuous Improvement Module

Meetings

Use Meetings to document meetings held related to the project and to define and assign any issues that need to be resolved. See "Meetings" on page 36.

Issues

Use Issues to assign additional tasks identified in meetings or projects to a responsible party. See "Issues" on page 40.

Projects

Use Projects to track the tasks, checklists, and approvals associated with launching a new project or making a change to an existing project. See "Projects" on page 48.

Project Tasks

Use Project Tasks to complete assigned responsibilities that bring a project to fruition. See "Projects Tasks" on page 57.

Improvements

Use Improvements to document and manage ideas to improve areas of the organization. See "Improvements" on page 61.

Lessons Learned

Use Lessons Learned to document and manage lessons that people have learned either through the solving of a problem or the completion of an improvement. See "Lessons Learned" on page 66.

Getting Started

Before you can begin using the Continuous Improvement module, it is important to understand the basics of how to navigate and use the QMS system. The system is intuitive, but some layouts, features, and best practices require a more thorough understanding. See the User Interface user guide for additional information about the QMS software.

Chapter 2

Setting Up the Continuous Improvement Module

Introduction

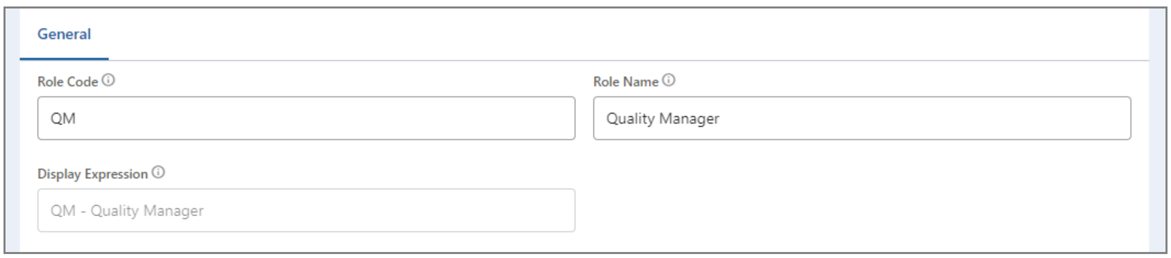
Some preparation is required before you can interact with The Continuous Improvement module.

Continuous improvement preparation involves setting up the organization of meetings and projects by type, creating issue categories and library gates, and setting up project roles. These tasks are generally performed by the Continuous Improvement Administrator, Continuous Improvement Maintenance, or the Projects Maintenance role.

Workflow Roles

A workflow role defines a label of a job responsibility specific for a workflow; note that these are different from training roles, project roles, and security roles, and are only used for workflow assignment and approval. Examples of a project role include Approver, Maintenance, and Purchaser.

Fig. 1: Workflow Roles process screen



Workflow Roles States

This section defines each state available in the workflow for the Workflow Roles process. See "State Change Security" on page 89 to learn more about how these states transition.

There are no states available.

Workflow Roles Tasks

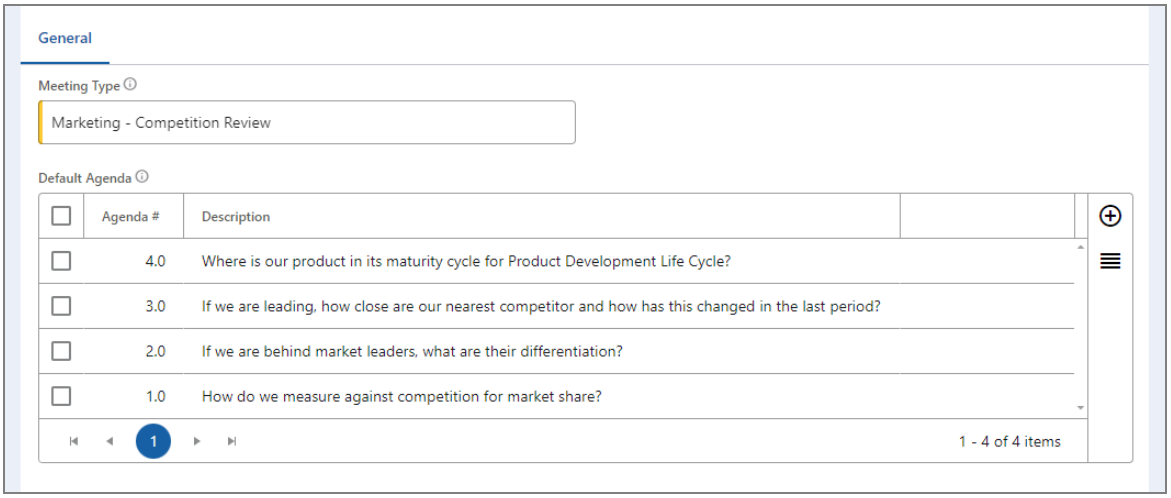
Adding a New Workflow Role

1. Select Workflow Roles from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter values for the role name and code. Note that the Display Expression field combines the two values; this is how users will look up this role.
3. Click Save to save the new record.

Meeting Types

Meeting types allow you to define a logical grouping for meetings and also set up the default agenda for a meeting. Examples of meeting types include Project Gate Review, Monthly Quality Review, Quarterly Scorecard Review, and Yearly Management Review. See "Meetings" on page 36 for more information.

Fig. 2: Meeting Types process screen

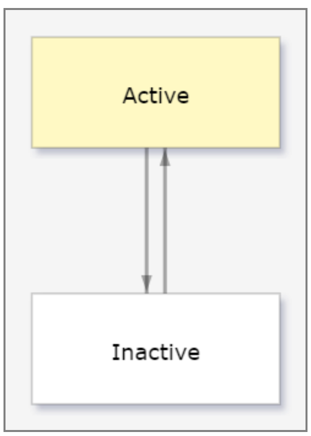


Meeting Types States

This section defines each state available in the workflow for the Meeting Types process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). A meeting type that is actively used.

Inactive. A meeting type that is no longer in use.

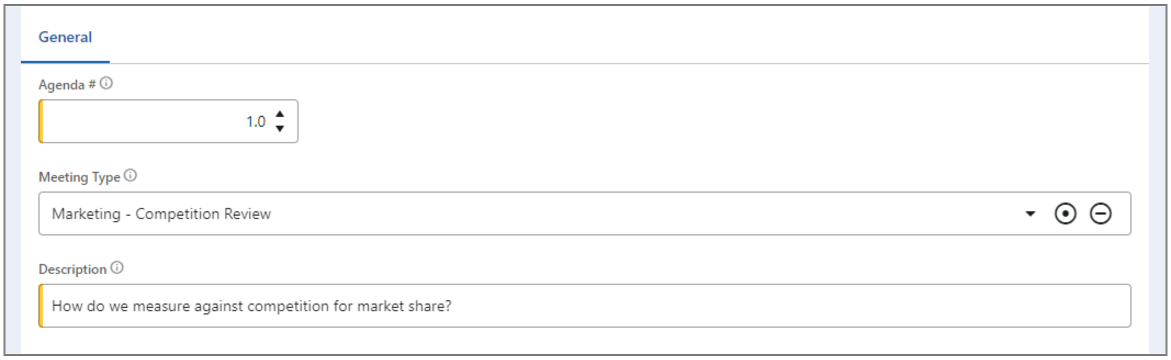


Meeting Types Tasks

Adding a New Meeting Type

1. Select Meeting Types from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter a name for the meeting type.
3. Click Save to save the new record.
4. In the Default Agenda field, click the Add New Item button. A new window appears.

Meeting Types Agenda screen



5. Assign a sequence number for the agenda item.

   Note: If you need to insert an agenda topic but do not want to re-number all subsequent topics, you can add a decimal value, such as 1.2.

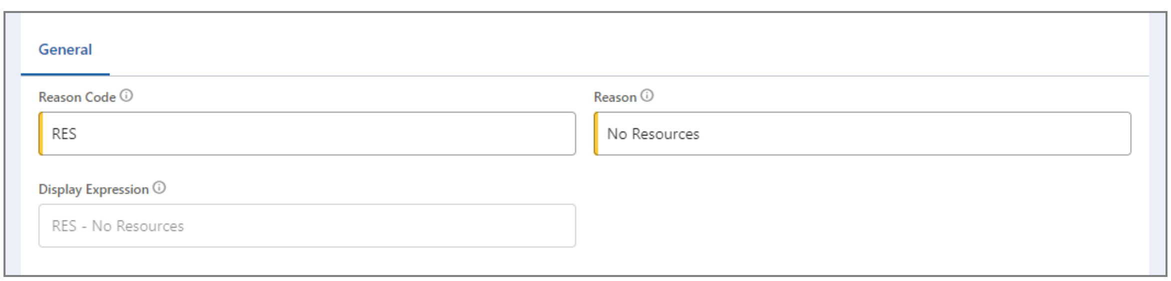
6. Enter a description for the agenda item.
7. Click Save to save the record.

Issue On Hold Reasons

When an issue record is being completed, complications may appear that require you to place the record on hold. Maybe unexpected costs arise and the issue cannot proceed without a budget re-evaluation; maybe the issue requires an item that needs to be ordered, and the record must be put on hold until a new shipment arrives.

The Issue On Hold Reasons process allows you to anticipate this potential events and add them to the system, where they can be selected in an Issues record when that issue is placed on hold. See "Issues" on page 40.

Fig. 3: Issue On Hold Reasons process screen

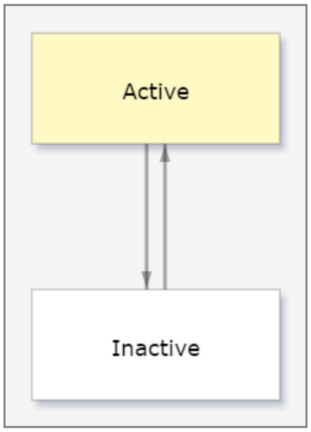


Issue On Hold Reasons States

This section defines each state available in the workflow for the Issue On Hold Reasons process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). An issue on hold reason that is actively used.

Inactive. An issue on hold reason that is no longer in use.



Issue On Hold Reasons Tasks

Adding a New Issue On Hold Reason

1. Select Issue On Hold Types from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter values for the reason code and name. Note that the Display Expression field combines the two values; this is how users will look up this reason.
3. Click Save to save the new record. When selecting the next state, click Active.

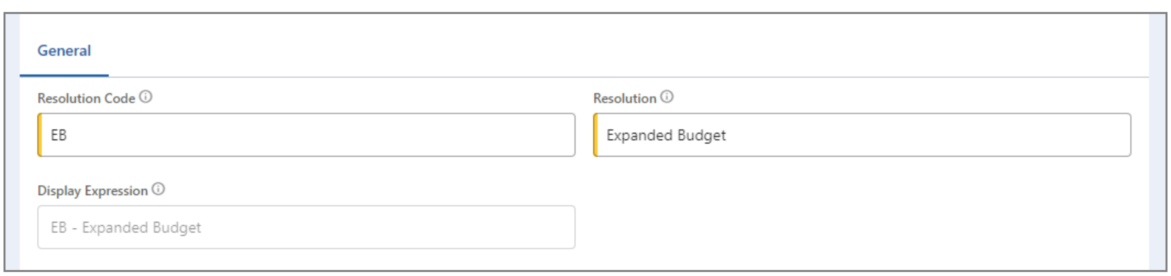
Note: You can toggle between Active and Inactive as needed. When the state is Inactive, the record cannot be used for new records.

Issue Resolutions

Issue Resolutions allow you to define a list of resolution codes for when an issue associated with a project is completed. By defining a standardized list of resolution codes and then assigning a single code to an issue, users can categorize and analyze how issues associated with projects are being resolved.

Issue resolution examples include Expanded Budget, Performed Maintenance, and Negotiated with Customer. See "Issues" on page 40.

Fig. 4: Issue Resolutions process screen

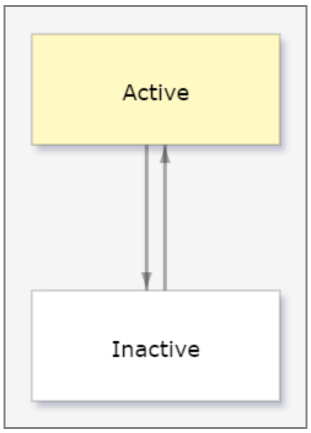


Issue Resolutions States

This section defines each state available in the workflow for the Issue Resolutions process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). An issue resolution that is actively used.

Inactive. An issue resolution that is no longer in use.



Issue Resolutions Tasks

Adding a New Issue Resolution

1. Select Issue Resolution from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter values for the reason code and name. Note that the Display Expression field combines the two values; this is how users will look up this reason.
3. Click Save to save the new record. When selecting the next state, click Active.

Note: You can toggle between Active and Inactive as needed. When the state is Inactive, the record cannot be used for new records.

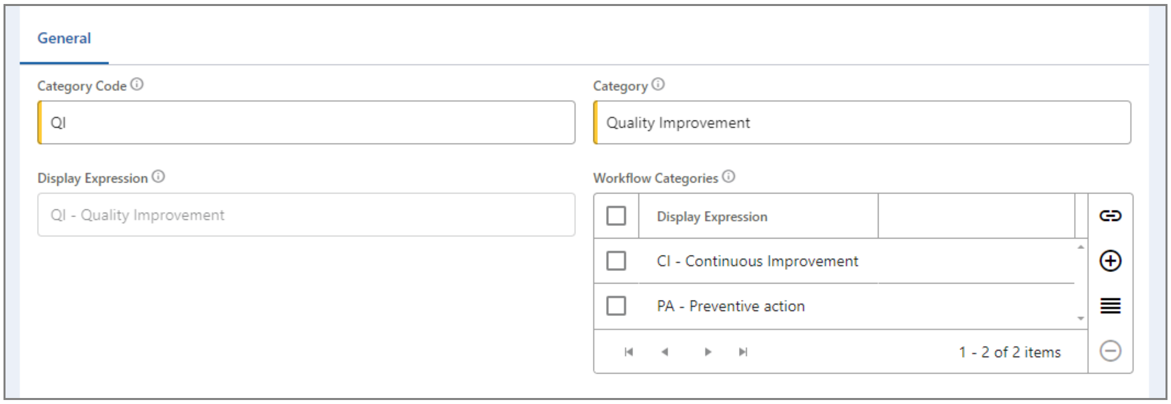
Issue Categories

Issue categories allow you to define a logical grouping for issues. Examples of issue categories include: Tooling, Process, Material, Gauging, etc.

If an issue category requires workflows, then you can create workflow categories and libraries. These may include ad hoc tasks, which allow different tasks and roles to be included in an issue. For example, you may have a workflow library item titled "RMA Approval", which requires different roles to sign off on the RMA. Ad hoc tasks can separate those different roles and a selection can be made on a case-by-case basis.

Issue categories are used in the Issues process. See "Issues" on page 40 for more information.

Fig. 5: Issue Categories process screen

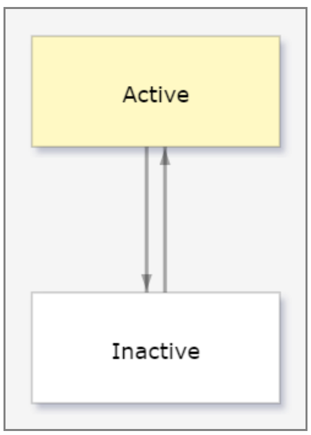


Issue Categories States

This section defines each state available in the workflow for the Issue Categories process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). An issue category that is actively used.

Inactive. An issue category that is no longer in use.



Issue Categories Tasks

Adding a New Issue Category

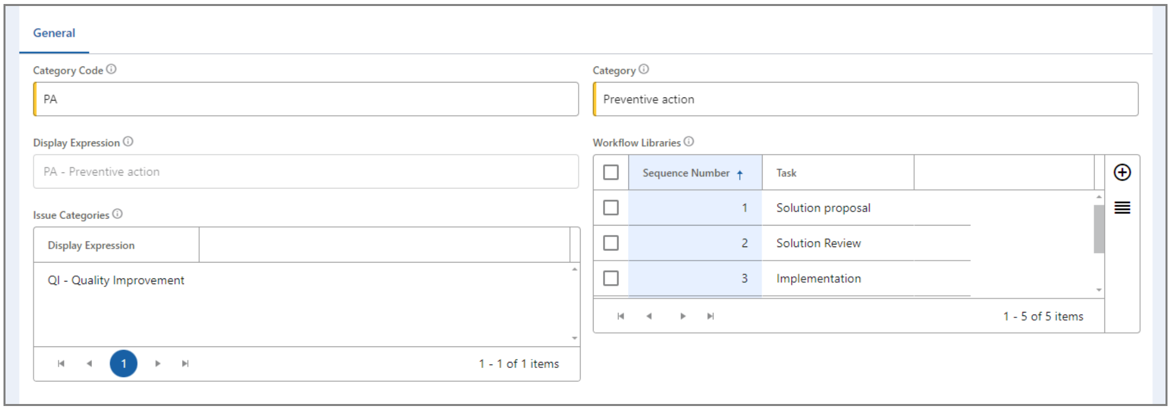
1. Select Issue Category from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter values for the category name and code. Note that the Display Expression field combines the two values; this is how users will look up this category.
3. If the issue category requires a workflow, then use the Link or Add New Item button to select or create a workflow. See "Adding a New Workflow Category" on the facing page if you are creating a new workflow.
4. Click Save to save the new record. When selecting the next state, click Active.

Note: You can toggle between Active and Inactive as needed. When the state is Inactive, the category cannot be used for new records.

Adding a New Workflow Category

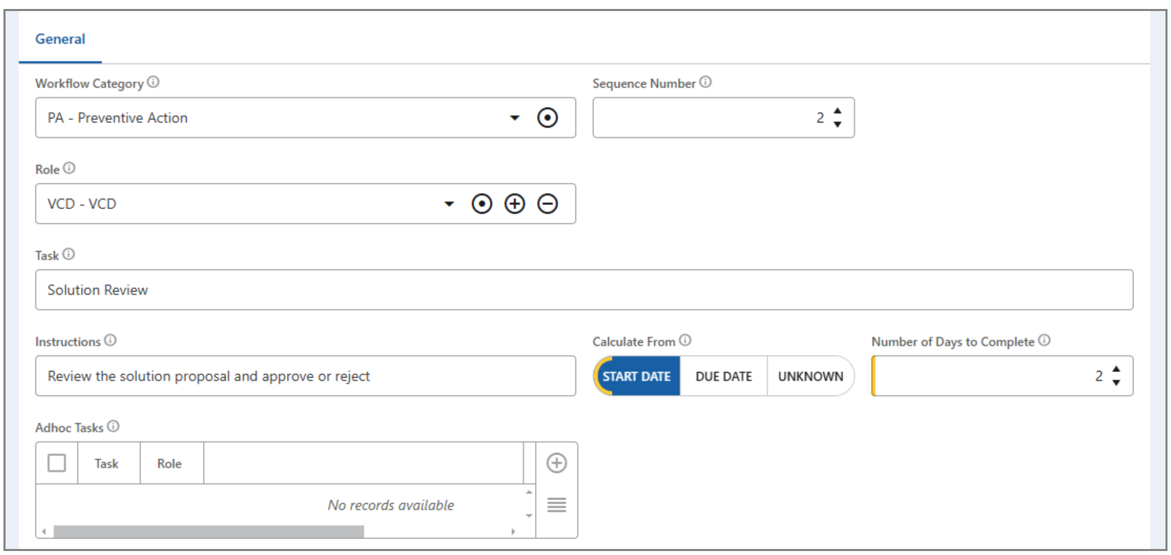
1. In the Issue Category detail screen, click the Add New Item ⊕ button in the Workflow Categories field. A new screen appears.

Fig. 6: Workflow Categories screen



2. Enter a category code and name.
3. Click Save to save the record. When selecting the next state, click Active.
4. In the Workflow Libraries field, click the Add New Item button. A new screen appears.

Workflow Library screen



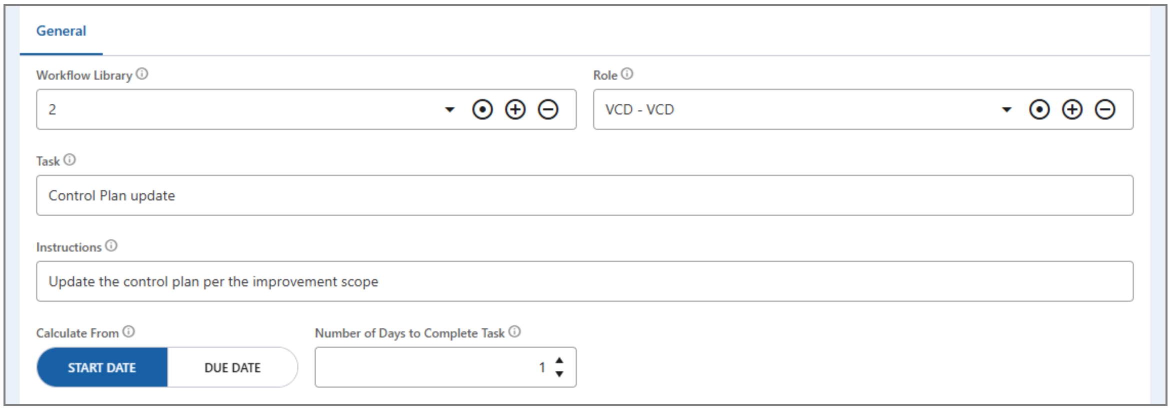
5. Select the role responsible for completing this task.
6. Enter the task and instructions.
7. In the "Calculate From" toggle field, select whether the task will be scheduled from a start date or a due date. Depending on which option is selected, a new field appears.

    a. **Start Date.** Calculate the duration of the task using the number of days to complete the task. A field titled Number of Days to Complete appears.
    b. **Due Date.** Calculate the duration of the task using the percent of time to complete the task. A field titled Percentage of Time to Complete appears.
8. Click Save to save the record. When selecting the next state:
    a. Click Active if you are finished creating the workflow library.
    b. Click Draft if you want to edit the workflow library or if you want to add ad hoc tasks.

Adding Ad Hoc Tasks to a Workflow Category

1. In the Workflow Library detail screen, click the Add New Item button in the Ad Hoc Tasks field. A new screen appears.

Fig. 7: Ad Hoc Tasks screen

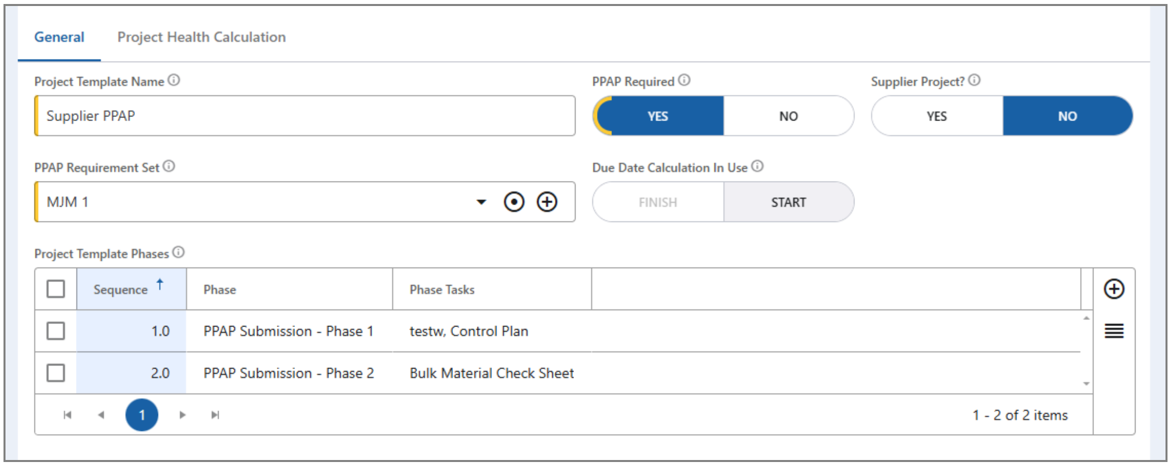


2. Select the role responsible for completing this task.
3. Enter the task and instructions.
4. In the "Calculate From" toggle field, select whether the task will be scheduled from a start date or a due date. Depending on which option is selected, a new field appears.
    a. **Start Date.** Calculate the duration of the task using the number of days to complete the task. A field titled Number of Days to Complete appears.
    b. **Due Date.** Calculate the duration of the task using the percent of time to complete the task. A field titled Percentage of Time to Complete appears.
5. Click Save to save the record. When selecting the next state, click Active. Repeat this step in the Workflow Library screen.

Project Templates

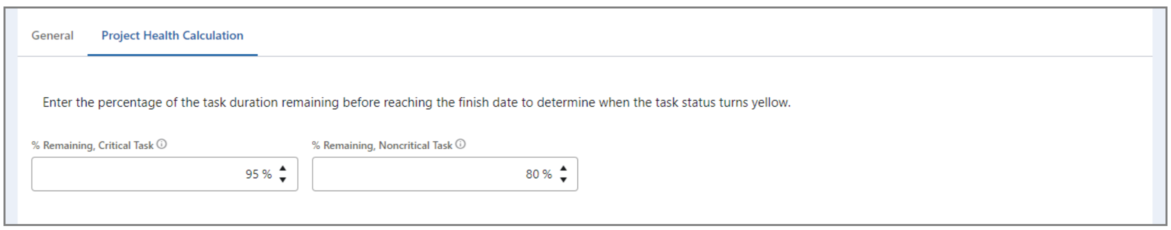
A project template is used to create a blueprint for a project. The template contains a list of phase libraries and tasks customized depending on the type of project. Project template examples include Supplier Project and New Product Launch. See "Project Phases Library" on page 24 and "Projects" on page 48 for more information.

Fig. 8: Project Templates process, General screen



The General tab contains the basic information for a project template, including a "PPAP Required" toggle field that allows PPAP submissions directly from a project. When the toggle is set to "Yes", a new field appears for you to select the requirement set.

Fig. 9: Project Templates process, Project Health Calculation screen



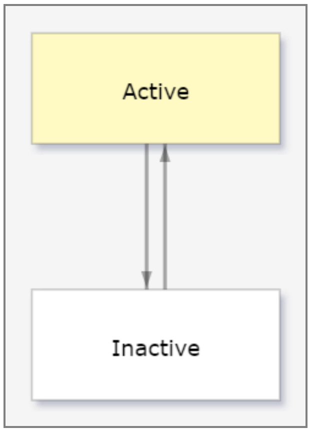
The Project Health Calculation tab allows for color coding depending on how much time is left on the duration of a task. For example, if you set the percent remaining to 80%, then once that task reaches 80% of its duration and the task is not closed, the task status turns yellow.

Project Templates States

This section defines each state available in the workflow for the Project Templates process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). A project template that is actively used.

Inactive. A project template that is no longer in use.



Project Templates Tasks

Adding a New Project Template

1. Select Project Templates from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter a descriptive name for the project template.
3. Use the "PPAP Required" toggle field to determine whether PPAP submissions should be required for projects of this project template.
4. Set the "Due Date Calculation" toggle field to Start or Finish to determine how library phases and tasks will get their start date.
5. In the Project Template Phases field, click the Add New Item button. A new tab opens.
6. In the new screen, select the applicable phase from the Phases drop-down. You can also create a new phase.
7. Select the sequence at which the phase is completed for the project template. Then click Save to save the new phase.
8. Back in the main process screen, navigate to the Project Health Calculation tab.
9. Select a percentage for both critical and noncritical tasks. This percentage of the task duration remaining before reaching the finish date determines when the task status turns yellow.
10. Click Save to save the new phase. When you return to the project template screen, save the new record and select Active.

Project Phases Library

The Project Phases Library process defines the list of phases that projects typically go through. Generally a phase is used as a transition point in the project.

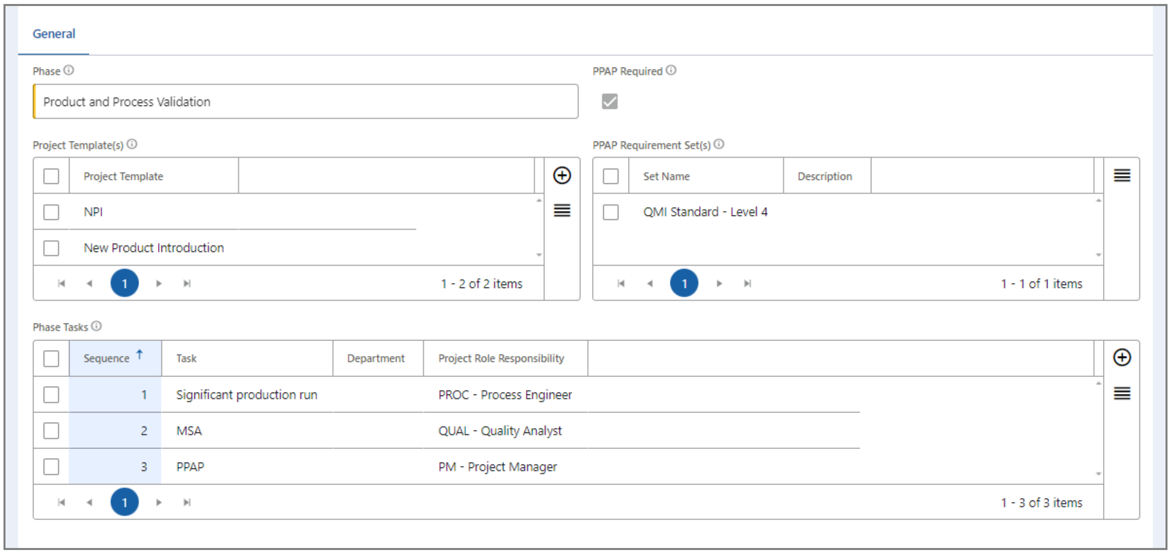
The phase plays an important role in the Projects process. After the phase is created, it is assigned to a project template. Once that project template is used in a new project, data from the phases automatically populate several fields in the project. The phase tasks then become project tasks.

If any linked project templates have PPAP requirements, then they will appear in the PPAP Requirement Sets field.

Project Phases Libraries are used in the following processes of the Continuous Improvement module:

- By Projects to represent a major milestone of the project. See "Projects" on page 48.
- By Project Tasks to link a task to a project phase. See "Projects Tasks" on page 57.
- By Project Templates to determine a sequence of specific phases that is used by a project template. See "Project Templates" on page 22.

Fig. 10: Project Phases Library process screen

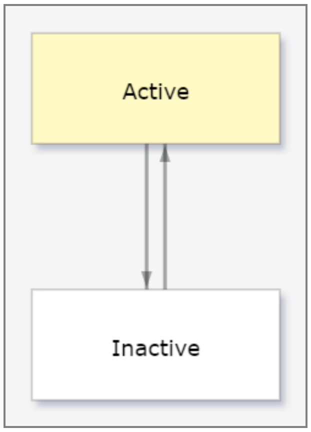


Project Phases Library States

This section defines each state available in the workflow for the Project Phases Library process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). A project phases library that is actively used.

Inactive. A project phases library that is no longer in use.



Project Phases Library Tasks

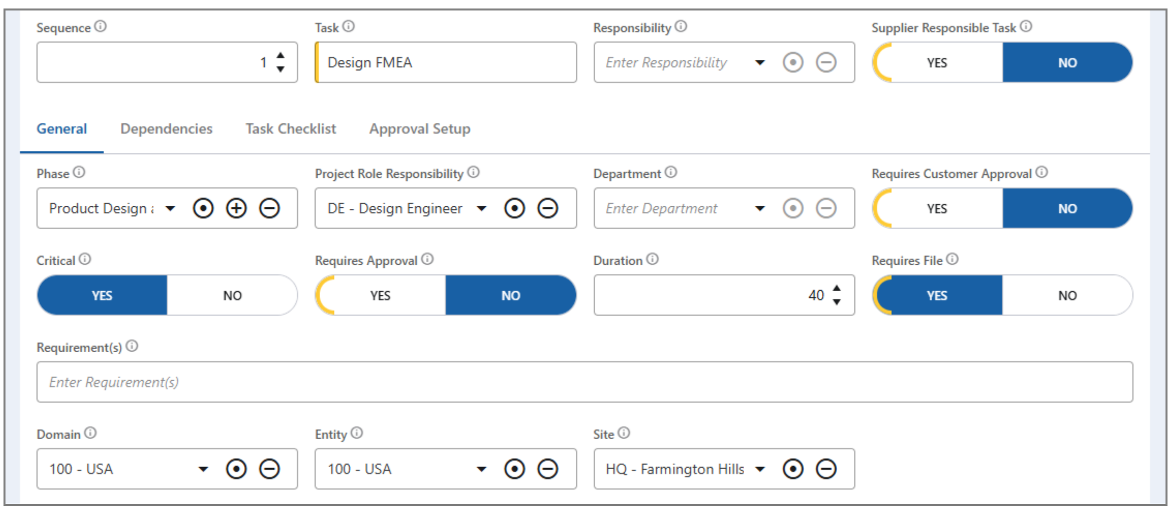
Adding a New Project Phases Library

1. Select Project Phases Library from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter a name to identify the phase library, such as "Phase 2" or "Product Development".
3. In the Project Templates field, click the Add New Item button. A new tab appears.
4. Select a project template from the drop-down field and select a sequence. Then click Save to save the record. Select the Active state.
5. Back at the Project Phases Library process screen, click the Add New Item button in the Phase Tasks field. A new tab appears.
6. Complete the fields per the instructions in "Adding a Project Tasks Library" on page 28. Then click Save to save the record.
7. Back at the phases library process screen, click Save to save the new record. When selecting the next state, click Active.

Project Tasks Library

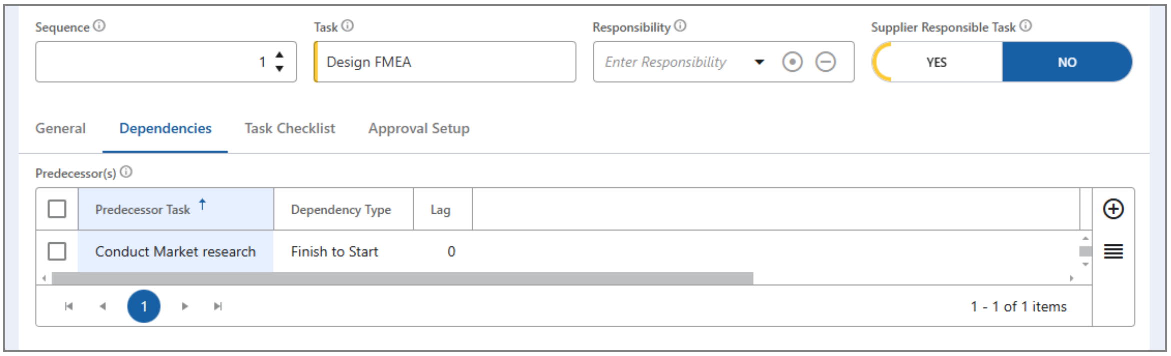
Project Tasks Library are created from the Project Phases Library process and become project tasks once the phase they belong to is used in a project. See "Project Phases Library" on page 24 and "Projects Tasks" on page 57.

Fig. 11: Project Tasks Library screen, General tab



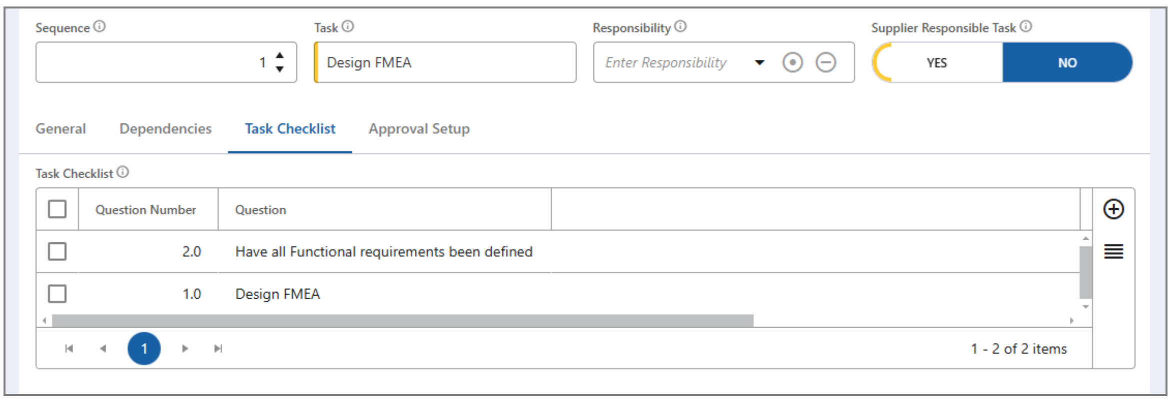
The General tab contains the basic information of a project tasks library.

Fig. 12: Project Tasks Library screen, Dependencies tab



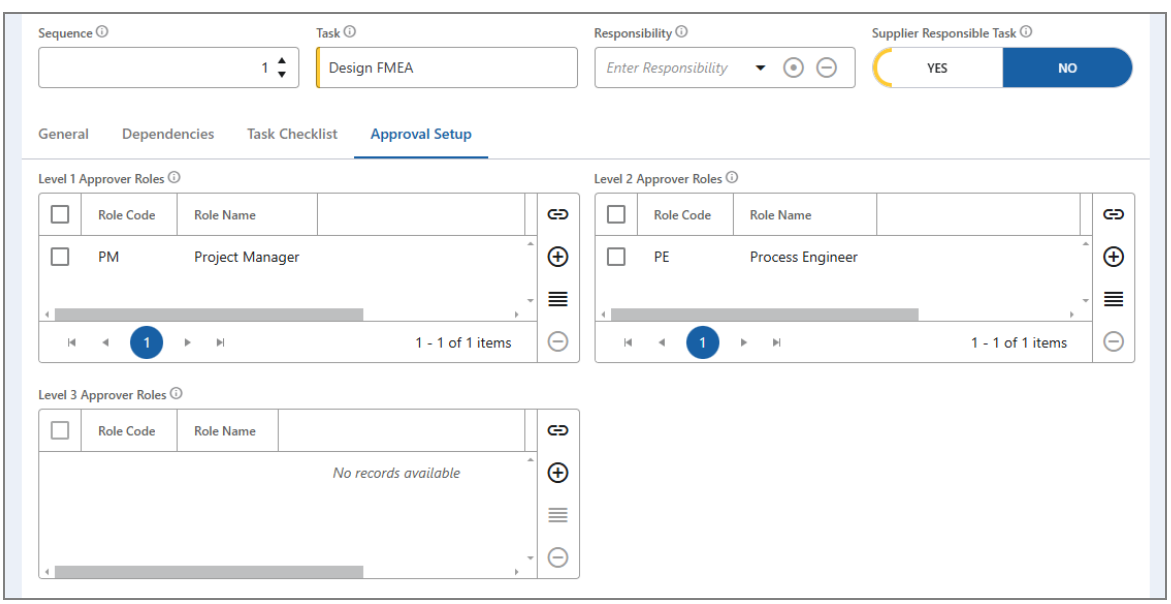
Use the Dependencies tab to select tasks that the current task depends on.

Fig. 13: Project Tasks Library screen, Task Checklist tab



Use the Task Checklist tab to define one or more questions to be used as a task completion checklist.

Fig. 14: Project Tasks Library screen, Approval Setup tab



Use the Approval Setup tab to select approver roles, which will determine which users are assigned as approvers for a project task.

Project Tasks Library States

This section defines each state available in the workflow for the Project Tasks Library process. See "State Change Security" on page 89 to learn more about how these states transition.

> *There are no states defined for this process.*

Project Tasks Library Tasks

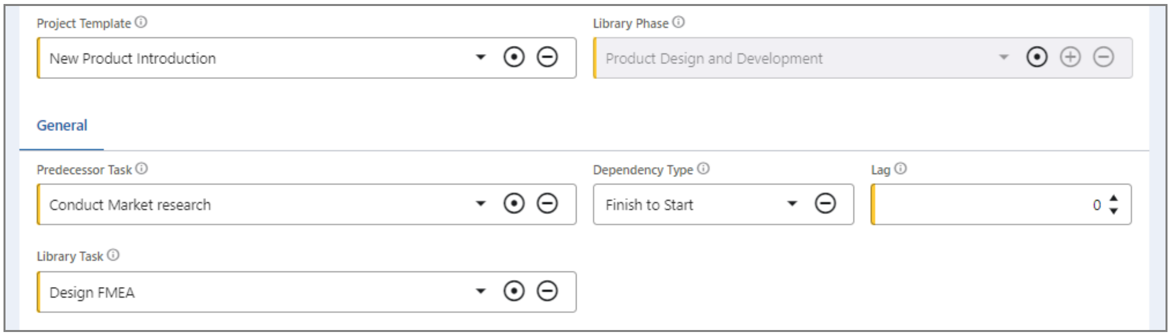
Adding a Project Tasks Library

Project Tasks Libraries originate in the Phase Tasks field of the Project Phases Library process. See Step 5 in "Adding a New Project Phases Library" on page 26 for more information.

1. In the General tab of the Project Tasks Library screen, enter a task name, sequence number, and either a project role responsibility or individual responsibility.
2. If the task requires approval, customer approval, a file, or is a supplier responsible task, then set the appropriate toggle fields. Each toggle field must be acknowledged, whether or not it is selected.
   a. If you select "Supplier Responsible Task", then the supplier will receive a notification about the task when they next log in.
   b. If the linked project template requires a PPAP, then the "Requires File" toggle field is automatically selected.
3. Select a calendar duration of the task, which measures in the unit of days.
4. Enter specific requirements that should be completed for the task. These requirements will show as read-only on the project task for reference purposes.
5. Navigate to the Dependencies tab. Complete the fields per the instructions in "Adding a Project Task Dependency" on the facing page. Then click Save to save the record.
6. Navigate to the Task Checklist tab. Click the Add New Item button. Complete the fields per the instructions in "Adding a Project Task Question" on the facing page. Then click Save to save the record.
7. Navigate to the Approval Setup tab. In each field, select or create one or more project roles that are required to approve the task as a level 1, 2, or 3 approver.
8. Click Save to save the new record.

Adding a Project Task Dependency

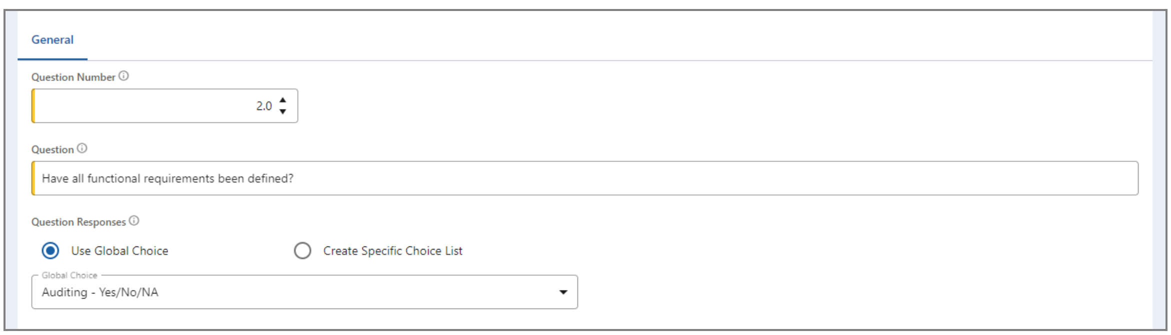
Fig. 15: Project Task Dependency screen



1. In the Project Tasks Library screen, navigate to the Dependencies tab. Click the Add New Item button. A new screen appears.
2. Select a library phase and library task if these fields did not automatically populate.
3. Select a project type. The Project Type field filters the Predecessor Task field.
4. Select a predecessor task and dependency type in the appropriate drop-down fields. There are four types of dependencies to choose from:
    a. **Finish to Finish.** The predecessor must finish before the successor can finish.
    b. **Finish to Start.** The predecessor must finish before the successor can start.
    c. **Start to Finish.** The predecessor must start before the successor can finish.
    d. **Start to Start.** The predecessor must start before the successor can start.
5. In the Lag field, select the number of days between the Predecessor task and the Library task.
6. Click Save to save the new record.

Adding a Project Task Question

Fig. 16: Project Task Questions screen



1. In the Project Tasks Library screen, navigate to the Task Checklist tab. Click the Add New Item button; a new screen opens.
2. In the Project Task Question screen, select a question number.
3. Create a question that will be used as a checklist for the project task.
4. Create multiple choice or true/false answer choices.
    a. **Use Global Choice.** You can select a pre-made answer choice from a list of very common choice scenarios, such as Yes/No, Scale 1-5, Pass/Fail, and more.

This menu of answer types originates from the Global Choice process in the Auditing module.

b. **Create Specific Choice List.** You can create a list of choices specific to the record you are creating. For example, if the question is "On which shift did this occur?" you can create a specific choice list such as A Shift/B Shift/C Shift. Add a new choice by clicking the Add button under Choice Details.

5. Enter details for the answer choice. The score value for each choice must be unique.
6. Click Add New Record to keep adding choices. To remove a row, highlight the row and click Remove.
7. Click Save to save the new record.

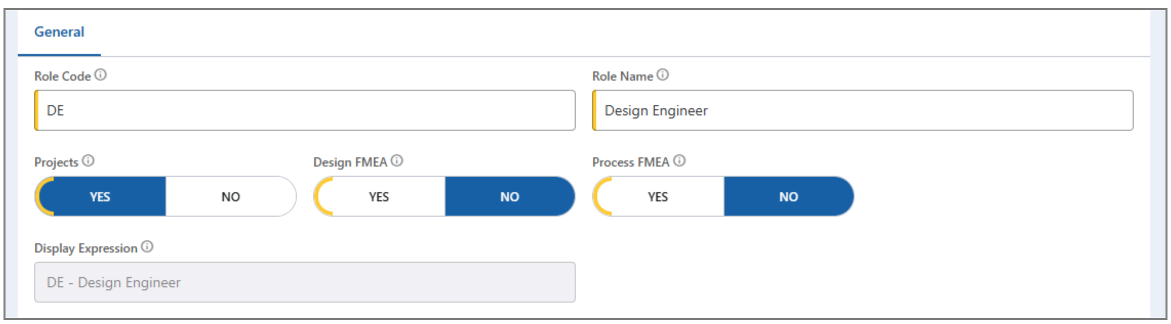
Project Roles Library

A project role defines a label of a job responsibility specific for a project; note that these are different from training roles, workflow roles, and security roles, and are only used for project assignment and approval. Examples of a project role include Project Manager, Design Engineer, or Quality Engineer.

Project Roles Library is used in the following processes of the Continuous Improvement module:

- By Projects to list which roles have been assigned to a project based on the assigned project task. See "Projects" on page 48.
- By Projects Tasks to assign a role who is responsible for a project task. See "Projects Tasks" on page 57.

Fig. 17: Project Roles Library screen

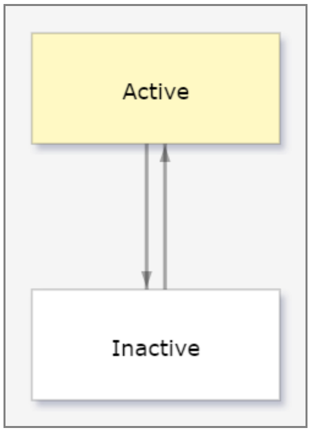


Project Roles Library States

This section defines each state available in the workflow for the Project Roles Library process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). A project role that is actively used.

Obsolete. A project role that can no longer be used.



Project Roles Tasks

Adding a New Project Role

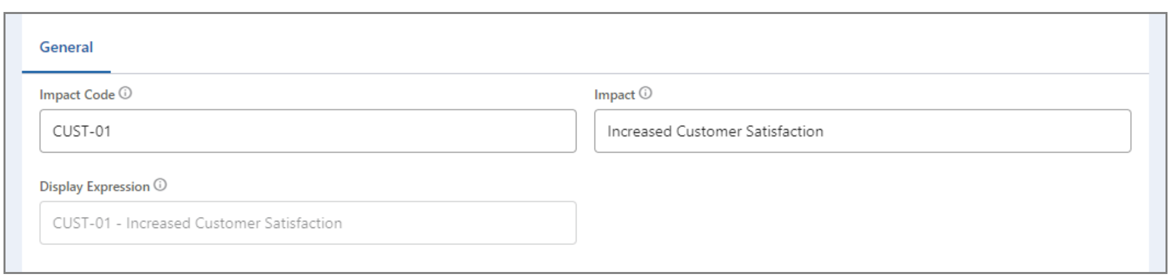
1. Select Project Roles Library from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter values for the role code and name. Note that the Display Expression field combines the two values; this is how users will look up this role.
3. Select whether this role should be available for selection on a project or project type.
4. Select whether this role should be available for selection on design FMEAs.
5. Select whether this role should be available for selection on process FMEAs.
6. Click Save to save the new record. When selecting the next state, click Active.

   Note: You can toggle between Active and Obsolete as needed. When the state is Obsolete, the role cannot be used for new records.

Improvement Impacts

Improvement impacts allow users to define a list of common areas or functions that may be influenced by an improvement. When submitting a new improvement, users can select one or more of these impacts that they think may change based on the improvement. Actual impacts can then be selected after the completion of the improvement. See "Improvements" on page 61 for more information.

Fig. 18: Improvement Impacts screen

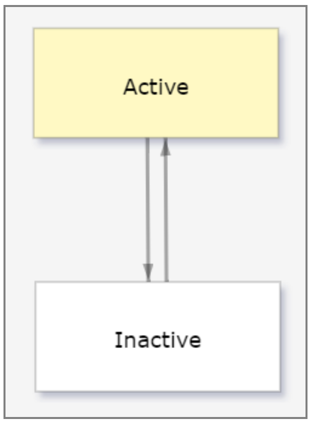


Improvement Impacts States

This section defines each state available in the workflow for the Improvement Impacts process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). An improvement impact that is actively used.

Inactive. An improvement impact that is no longer in use.



Improvement Impacts Tasks

Adding a New Improvement Impact

1. Select Improvement Impacts from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter values for the impact name and code. Note that the Display Expression field combines the two values; this is how users will look up this impact.
3. Click Save to save the new record. When selecting the next state, click Active.

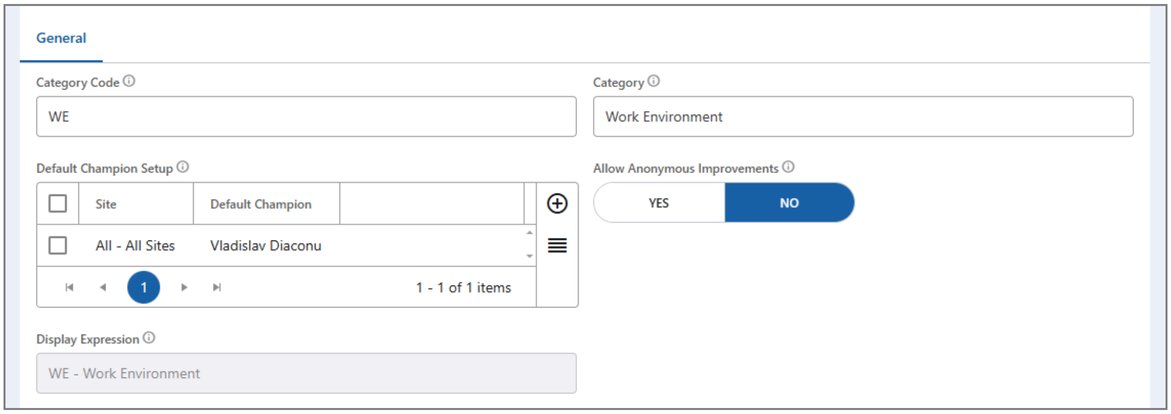
Note: You can toggle between Active and Inactive as needed. When the state is Inactive, the impact cannot be used for new records.

Improvements Categories

The improvements categories process allows users to organize improvements associated with a nonconformance, which provides users with the ability to search through records based on this criteria. Each improvement can belong to one category.

The default champion can be set up for each category, as well as an option to allow anonymous improvement submissions. Categories also allow the setup of the default responsibility for an improvement based on site. See "Improvements" on page 61 for more information.

Fig. 19: Improvements Categories screen

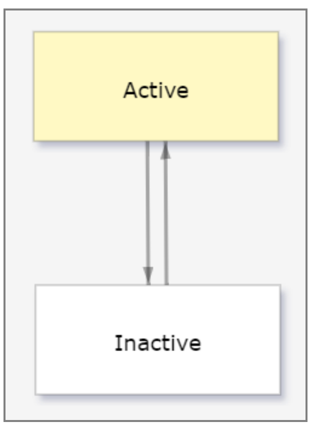


Improvements Categories States

This section defines each state available in the workflow for the Improvements Categories process. See "State Change Security" on page 89 to learn more about how these states transition.

Active (Default). An improvement category that is actively used.

Inactive. An improvement category that is no longer in use.



Improvements Categories Tasks

Adding a New Improvements Category

1. Select Improvements Categories from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter values for the category code and name. Note that the Display Expression field combines the two values; this is how users will look up this category.
3. Click the Add New Item button in the Default Champion Setup field. A new screen opens.
4. Use the drop-down fields to select a site and a default champion for the improvement

category. The Improvements Category field defaults.

5. Click Save to save the record and return to the main process screen.

   Note: Typically, the default user responsible is the one to determine if the improvement requires any action.

6. If you want to allow users to create improvements with this category anonymously, then set the "Allow Anonymous Improvements" toggle to YES.
7. Click Save to save the new record. When selecting the next state, click Active.

   Note: You can toggle between Active and Inactive as needed. When the state is Inactive, the category cannot be used for new records.

Chapter 3

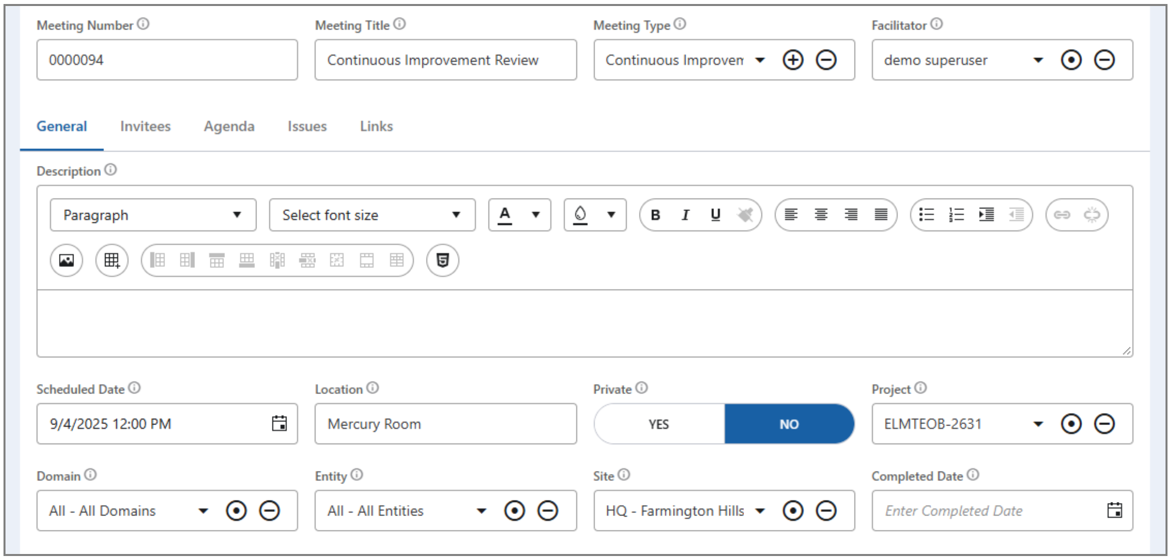
Using the Continuous Improvement Module

Meetings

Organized team communication is critical to successful project management. In the Meetings process, a facilitator can set and manage responsibilities and due dates to resolve identified issues. From the location and invitations to the agenda and issues at hand, all aspects of the meeting are facilitated in this process.

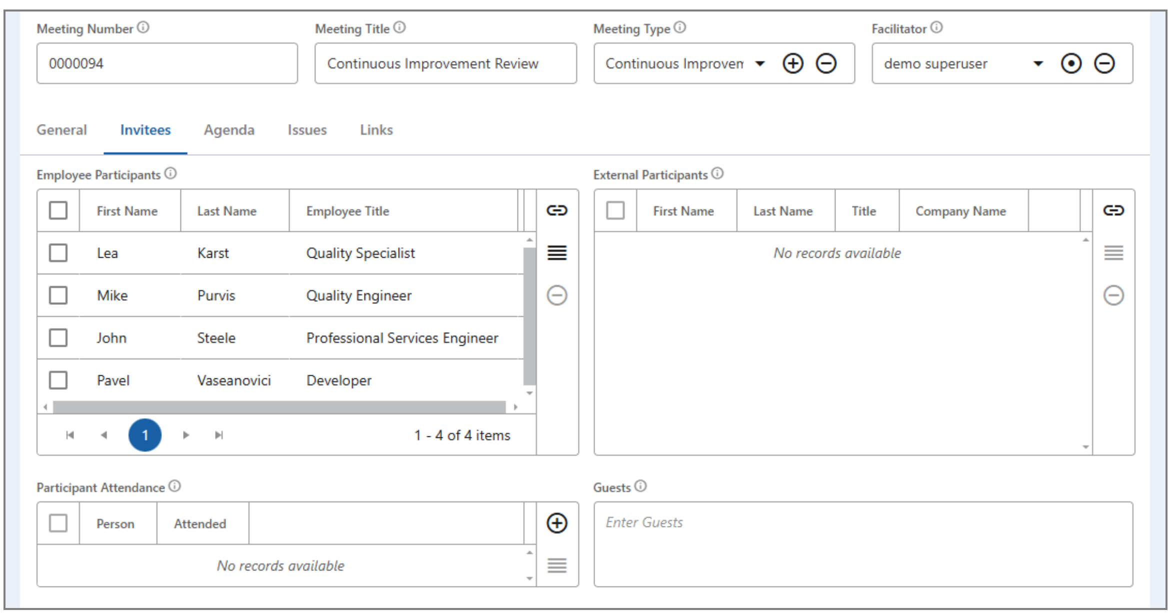
Additional tasks can be linked to the Issues process. See "Issues" on page 40.

Fig. 20: Meetings screen, General tab



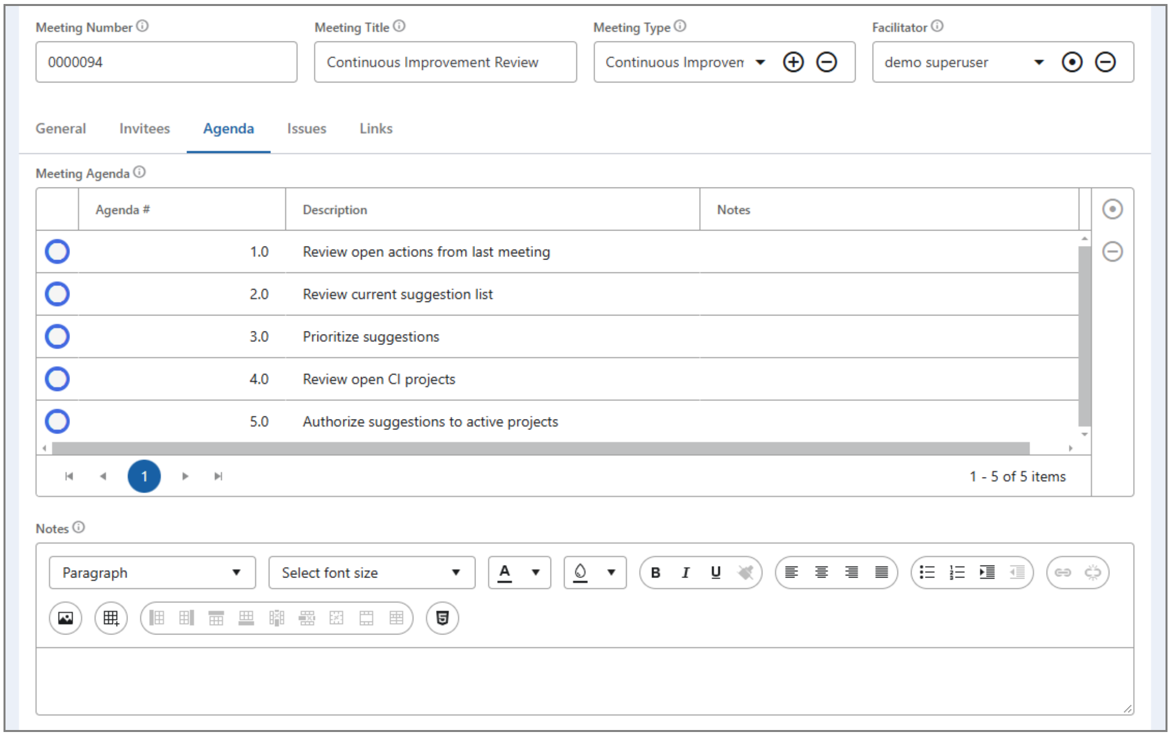
The General tab is used to define the basic details of a meeting, including the meeting type, scheduled and completed dates, facilitator, location, related project, and more.

Fig. 21: Meetings screen, Invitees tab



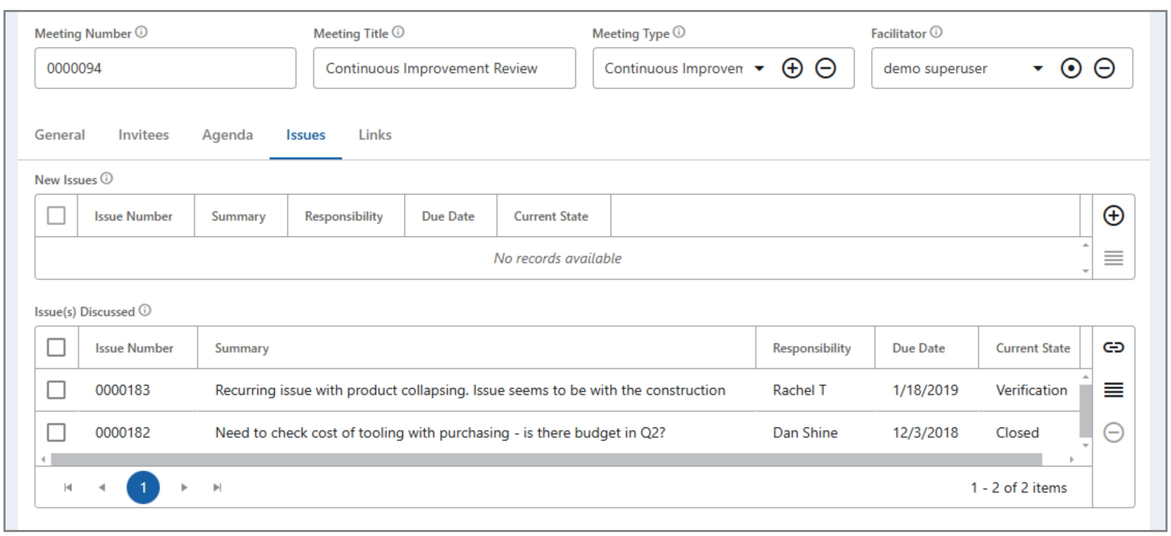
The Invitees tab shows employee and external participants, as well as additional guests.

Fig. 22: Meetings screen, Agenda tab



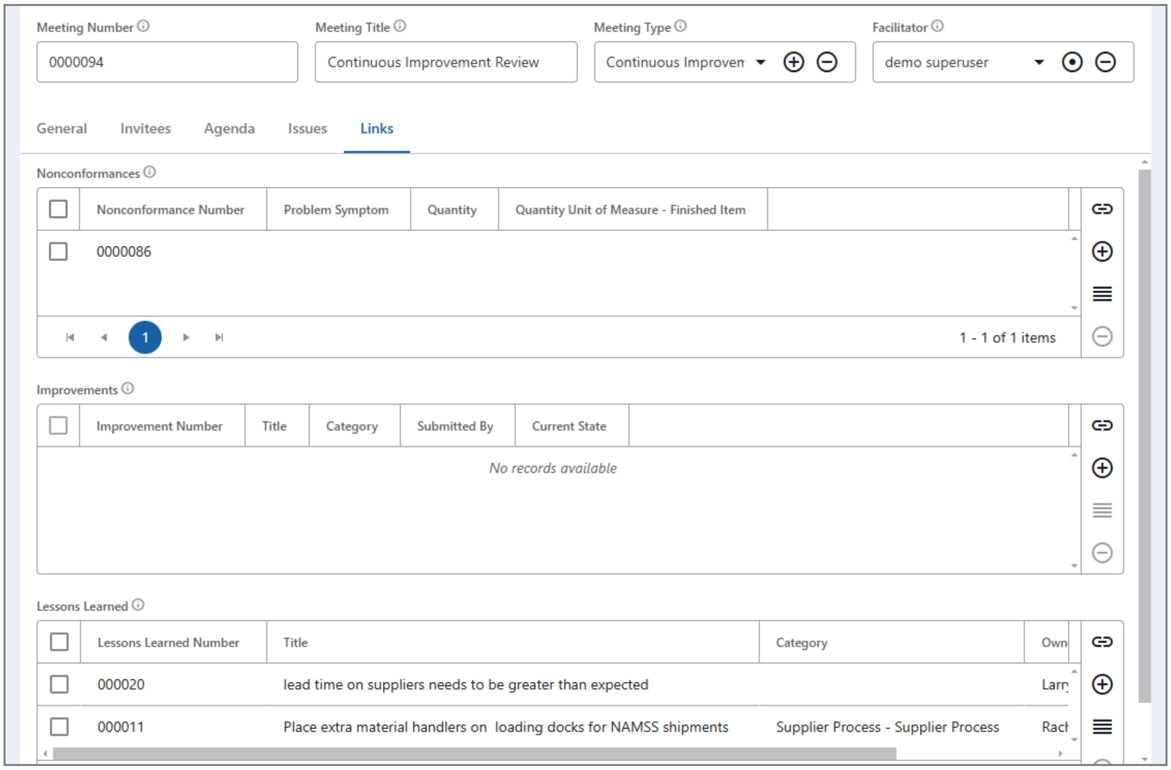
The Agenda tab houses the meeting agenda. The agenda may be automatically generated from the meeting type, but new or additional agenda items can be added.

Fig. 23: Meetings screen, Issues tab



The Issues tab allows you to add new issues to assign and complete, as well as link existing issues to be discussed.

Fig. 24: Meetings screen, Links tab



The Links tab contains any nonconformances, improvements, or lessons learned that are relevant to the meeting.

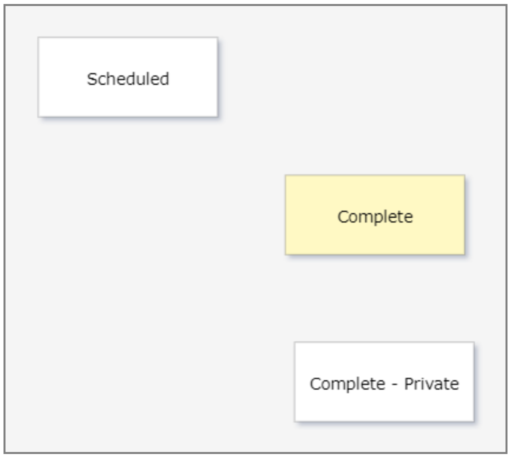
Meetings States

This section defines each state available in the workflow for the Meetings process. See "State Change Security" on page 89 to learn more about how these states transition.

Scheduled (Default). The meeting is scheduled but not yet complete.

Complete. The meeting has been completed. This state is automatically set when the completed date is filled in.

Complete – Private. The meeting has been completed. This state is automatically set when the completed date is filled in and the "Private" check box is checked.



Meetings Tasks

Adding a New Meeting

1. Select Meetings from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Enter a meeting title and location.
3. Select a meeting type, scheduled date, facilitator, and relevant project.
4. If the meeting is private, then set the "Private" toggle field to YES.
5. In the Invitees tab, click the Link button in the Employee Participants field to add one or more employees who will attend the meeting. Then do the same for any external participants.
6. If any other guests will attend the meeting, then type their names in the Guests field.
7. Click Save to save the new record. When selecting the next state, click Scheduled.

Completing a Meeting

After the meeting has concluded, return to the Meeting process to add final details and close out the record. Double-check everything before you save; once the state is changed to Complete, the record cannot be edited.

1. In the Meetings detail screen, navigate to the General tab.
2. Select the date and time the meeting ended.
3. Navigate to the Issues tab. In the New Issues field, click the Add New Item button to create an issue. See "Issues" on page 31 for more information.
4. In the Issues Discussed field, click the Link button to link any existing issues that were discussed during the meeting.
5. Navigate to the Links tab. Use the Link or Add New Item buttons as necessary to add relevant nonconformances, improvements, or lessons learned.
6. Click Save to save the record. When selecting the next state, click Complete or Complete – Private.
7. Navigate to the Invitees tab. Note that the Participant Attendance field is now populated with all employee and external participants.
    a. If a participant did not attend the meeting, then double-click their name. A new screen appears.

b. Click the "Attended" check box to de-select it.
c. Click Save to save the record.

Creating a Meeting Copy

When a meeting is completed, the Actions button in the toolbar will contain a single command: Copy Meetings. Upon clicking this command, a new meeting is created that copies over the information from the following fields:

- Meeting Type
- Meeting Title
- Facilitator
- Private
- Location
- Project
- Domain
- Site
- Employee participants
- External Participants

Additionally, any issues in the New Issues field of the old meeting now appear in the Issues Discussed field of the new meeting.

To see the meeting copy, close the current meeting and return to the search screen. The new meeting will appear at the top of the list, provided that the search screen is sorted by ID.

Issues

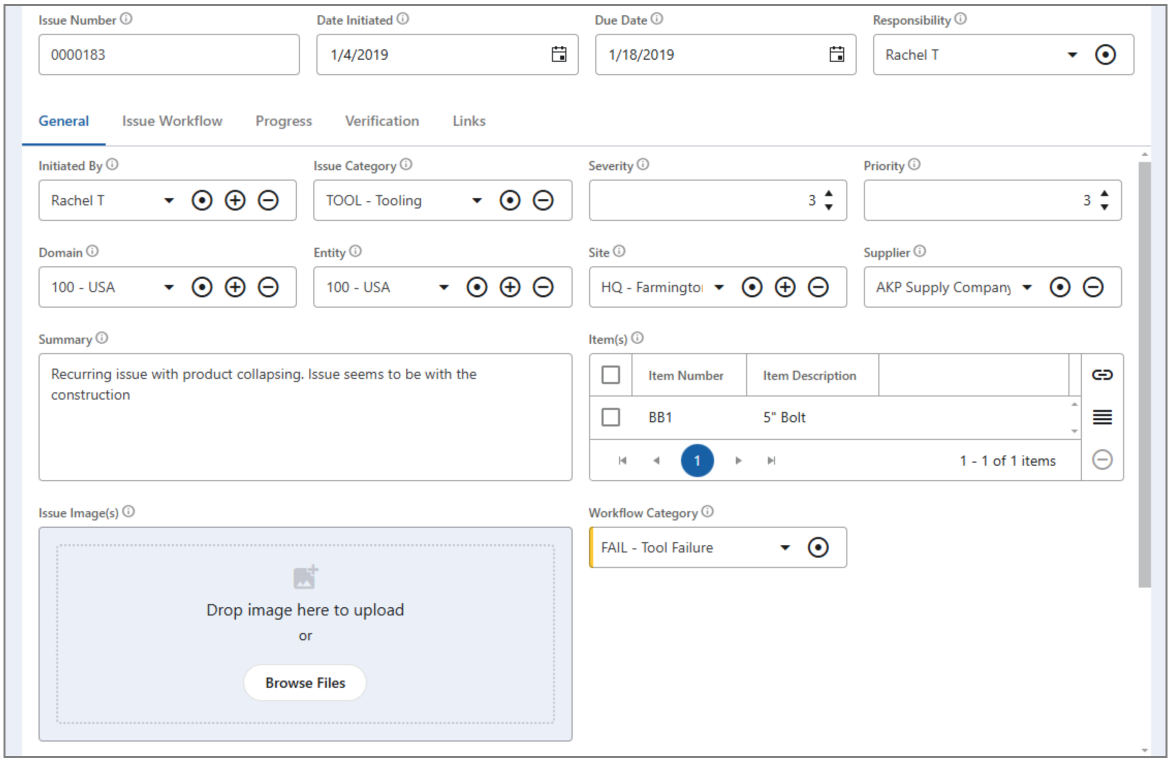
Typically, an issue is an ad hoc topic or dilemma that arises when working on a project or holding a meeting, therefore they must be discussed and resolved. When an issue record is created, it is assigned to an employee for resolution.

Issues are used in several processes of the Continuous Improvement module to link, track, and assign issues that come up during that process:

- "Meetings" on page 36.
- "Projects" on page 48.
- "Projects Tasks" on page 57.
- "Lessons Learned" on page 66.

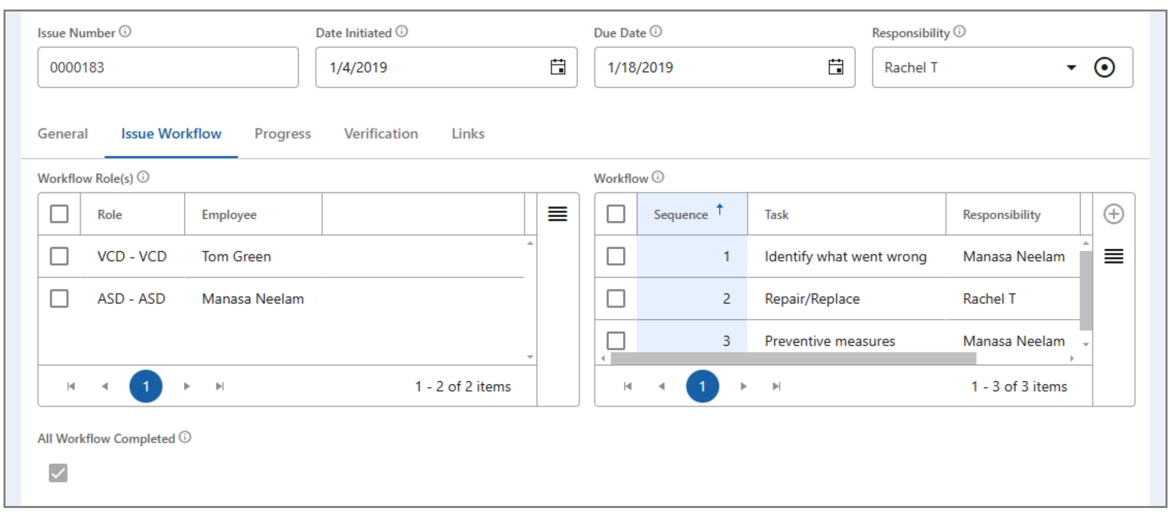
Issues are also used by Change Requests. See the Document Control user guide.

Fig. 25: Issues screen, General tab



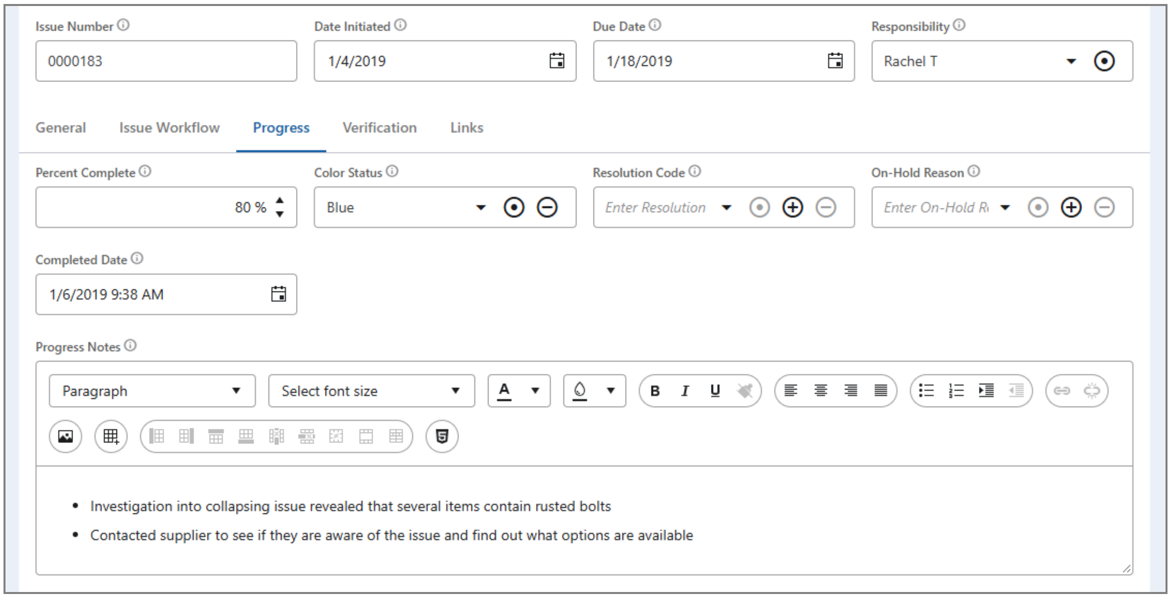
The General tab is used to define the basic details of an issue, including the summary, severity and priority, supplier, description, and more.

Fig. 26: Issues screen, Issue Workflow tab



The Issue Workflow tab appears when an issue category that contains a workflow is selected. Use this tab to assign employees to workflow roles and complete each task in a workflow. Once each task is completed, the "All Workflow Completed" check box is automatically selected and the Issue record's state moves to Verification.

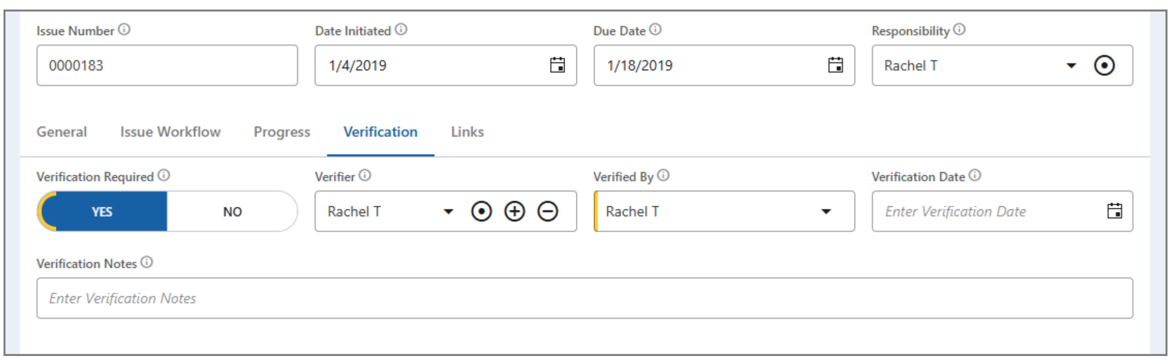
Fig. 27: Issues screen, Progress tab



Use the Progress tab to track the progression of the issue as it is completed. You can also place the issue on hold.

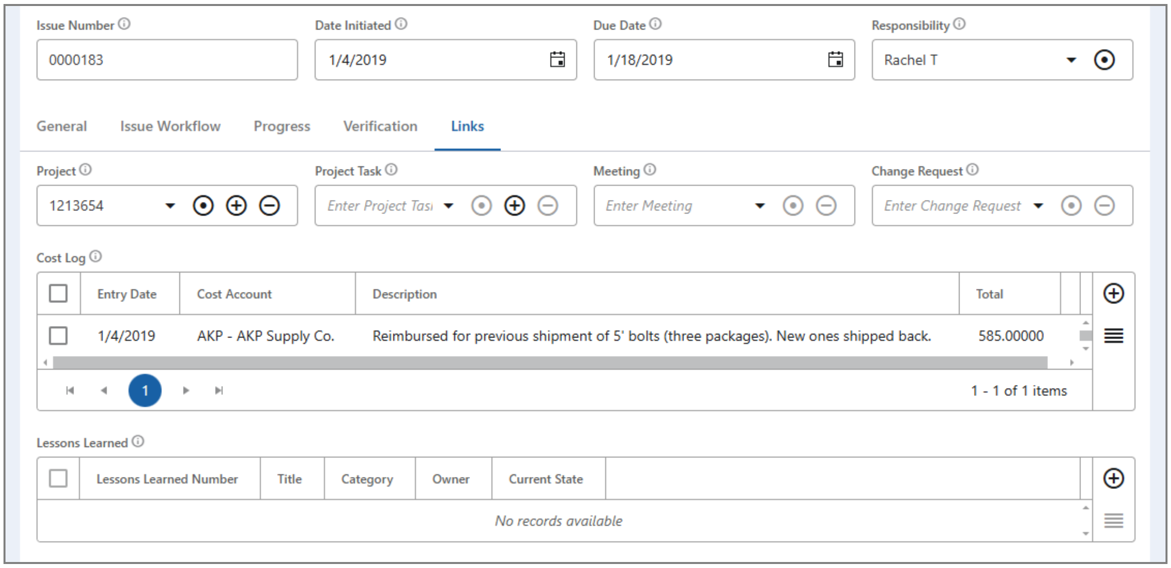
The Progress Notes field is rich text, which means you can format the text in several ways, such as insert pictures and hyperlinks or adjust fonts and colors.

Fig. 28: Issues screen, Verification tab



Use the Verification tab to determine whether the issue requires verification and who is assigned that responsibility. The verifier reviews and finalizes the issue before it is sent to the Complete state.

Fig. 29: Issues screen, Links tab



Use the Links tab to link the issue to various other processes, including a project, a meeting, a change request, a cost log, and more.

Issues States

This section defines each state available in the workflow for the Issues process. See "State Change Security" on page 89 to learn more about how these states transition.

New (Default). The default state for a newly created issue.

Assigned. The issue is ready to be actioned.

In Progress. This issue is currently being worked on.

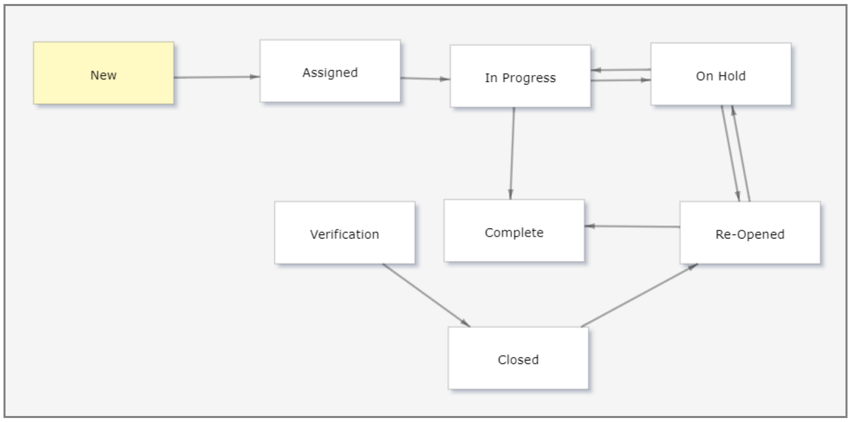
On Hold. The issue was put on hold. The reason will be noted in the On Hold notes.

Re-Opened. The issue was previously on hold, but has since been re-opened.

Complete. The issue is marked as complete. Before it can be closed, it must be verified.

Verification. The issue must be verified by the assigned user before it can be finalized.

Closed. The issue has been completed, verified (if necessary), and closed.



Issues Tasks

Adding a New Issue

1. Select Issues from the left navigation panel. Then, click the Add Item ⊞ button in the toolbar.
2. Enter a summary of the issue.
3. Select a user to be responsible for the issue.
4. Select a supplier, severity, priority, category, and due date.

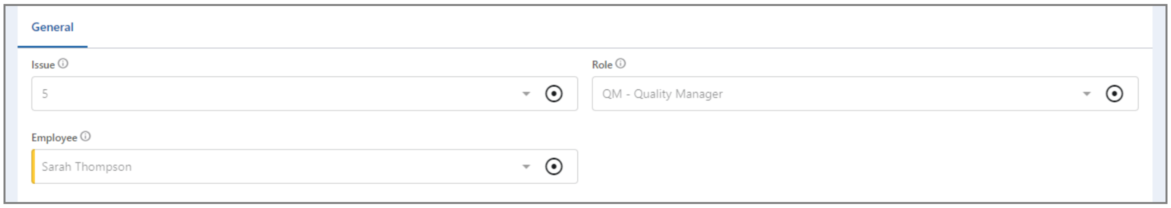
   Note: If the issue category contains a workflow, then a new field appears: Workflow Category. This field is required.

5. Select the item or items that are the source of the issue. This field is limited by the Supplier field.
6. Enter a detailed description of what was done to complete the issue.
7. If you have an image that represents the issue, then use the Browse button in the Issue Image field to add the image.
8. Navigate to the Verification tab. If this issue requires verification before it can be finalized, then select YES in the "Verification Required" toggle. A new field appears.
9. Select a user to be the verifier.
10. Click Save to save the new record. When selecting the next state:
    a. If there are no workflows, click Assigned.
    b. If a Workflow Category was selected, click New. A new tab appears titled Issue Workflow.

If you added a workflow category to the issue, then workflow roles must be defined before the issue can be assigned.

1. Navigate to the new tab titled Issue Workflow.
2. In the Workflow Roles field, double click a role. A new screen appears.

Fig. 30: Issue Workflow Roles



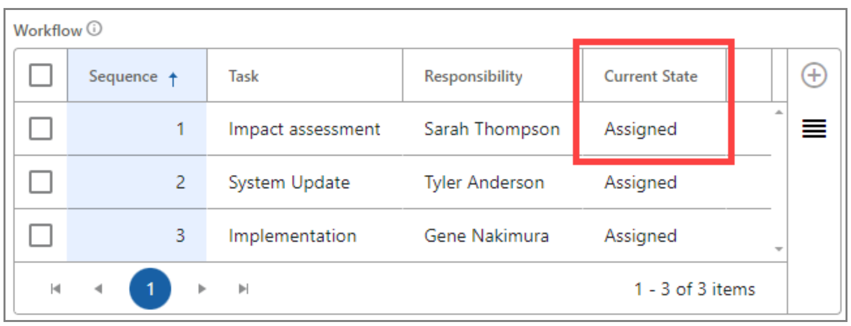
3. Select a user in the Employee drop-down field. This person is responsible for completing any workflow tasks assigned to the role.
4. Click Save to save the record. When selecting the next state, click Assigned.

Completing Workflows

1. Navigate to the Issue Workflow tab.
2. In the Workflow field, double-click the first task to open it. A new screen appears.

Note: Once the Issue record moved to the Assigned state, the first task in the Workflow field was also moved to the Assigned state automatically. Each task must be completed in sequential order.

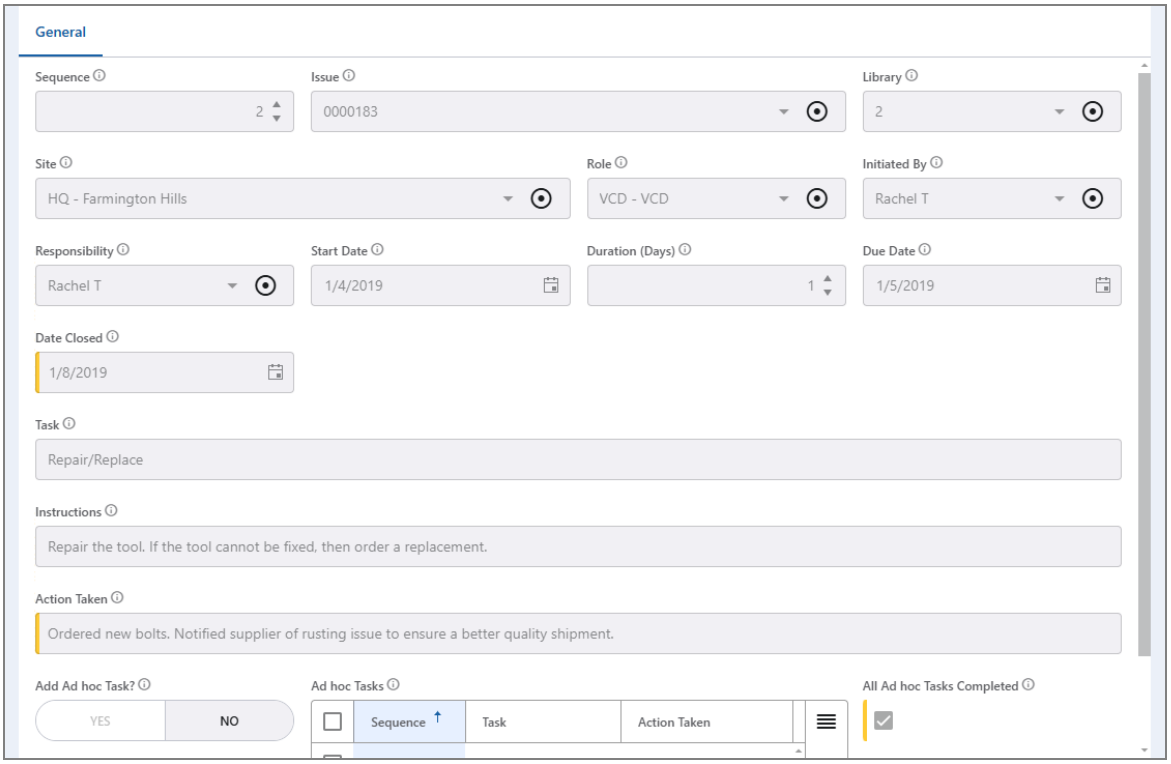
Fig. 31: Workflow field


Workflow

Sequence	Task	Responsibility	Current State
1	Impact assessment	Sarah Thompson	Assigned
2	System Update	Tyler Anderson	Assigned
3	Implementation	Gene Nakimura	Assigned

1 - 3 of 3 items

Fig. 32: Workflow detail screen



3. In the new screen, note that most fields cannot be edited. The only fields that the responsible role can edit are the Action Taken, Date Closed, and "Add Ad Hoc Task?" fields.
4. As you complete the task, enter your notes in the Action Taken field. If you need to save the workflow before it is finished, select the In Progress state.

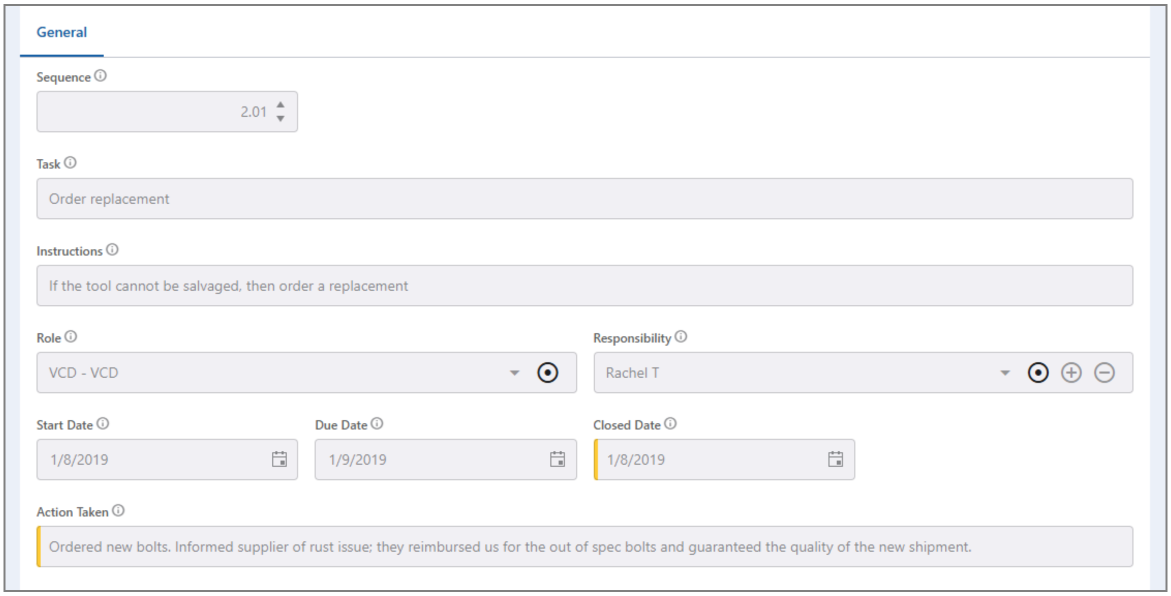
   Note: See "Adding an Ad Hoc Task to a Workflow" below to learn how to add an ad hoc task.

5. When the task is complete, select the current date in the Date Closed field. Click Save to save the record. When selecting the next state, click Complete.

Adding an Ad Hoc Task to a Workflow

1. In the Workflow detail screen, set the "Add Ad Hoc Task?" toggle field to YES. A new field appears titled Ad Hoc Task Selection.
2. Select the ad hoc task and click Save to save the record. When selecting the next state, click In Progress.
3. Once the record is saved, the Ad Hoc Task Selection field is replaced by a new field titled Ad Hoc Tasks. Double-click the newly created task in this field. A new screen opens.

Fig. 33: Ad Hoc Tasks screen



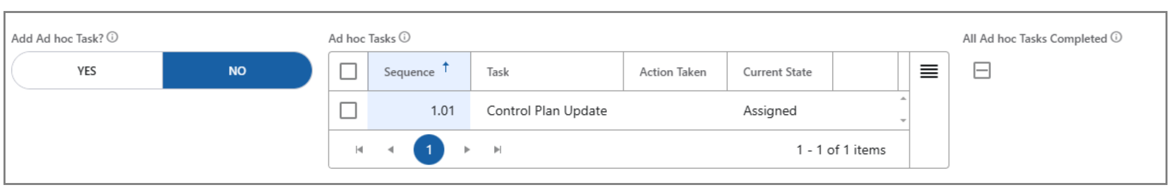
4. Select the start date. The Due Date field updates automatically.
5. Describe the actions taken to complete this ad hoc task.
6. When finished, select the closed date and click Save to save the record. When selecting the next state, click Complete.

   Note: You can also select the In Progress state if you need to save the ad hoc task before it is completed.

7. Back in the Workflow detail screen, click the Reload button in the toolbar. Note that the "All Ad Hoc Tasks Completed" check box is automatically selected.

   Note: You can add an additional ad hoc task by repeating Steps 1-2.

Fig. 34: Workflow detail screen, Ad Hoc Task fields



8. Refer back to "Completing Workflows" on page 45 to complete the workflow.

Completing an Issue

1. In the Issues detail screen:
   a. If the issue contains workflows, then navigate to the Issue Workflow tab. Follow the instructions in "Completing Workflows" on page 45.
   b. If the issue does not contain workflows, navigate to the Progress tab.

2. Use the Percent Complete and Color Status fields to track the completion and status of the issue.
3. Enter notes of your progress in the Progress Notes field.

   Note: Every time you record progress in the issue, use the In Progress state upon saving the record.

4. In the Links tab, use the drop-down fields to select any records associated with the issue.
5. Use the Link or Add New Item button in the Cost Log field to add one or more records for any costs associated with the issue. See the Tooling and Equipment Management user guide for more information on Cost Logs.
6. Use the Add New Item button in the Lessons Learned field to create one or more lessons learned based on the completion of the issue. See the NCR & CAPA user guide for more information on Lessons Learned.
7. When the issue is ready to be finalized, mark the percent complete as 100 and select the completed date.
8. Click Save to save the new record. When selecting the next state:
   a. If the issue requires verification, click Complete.
   b. If the issue does not require verification, click Closed.

   Note: If the issue must be put on hold, then select an on-hold reason in the Progress tab and select the state On Hold upon saving the record.

Verifying an Issue

If verification was marked as required, then the issue record must be verified before it can be closed. Only the user indicated as the Verifier can complete this task.

1. In the Issues detail screen, navigate to the Verification tab.
2. Select your name from the drop-down list in the Verified By field.
3. Select the current date in the Verification Date field.
4. Use the Verification Notes field to add notes as needed.
5. Click Save to save the new record. When selecting the next state, click Closed.

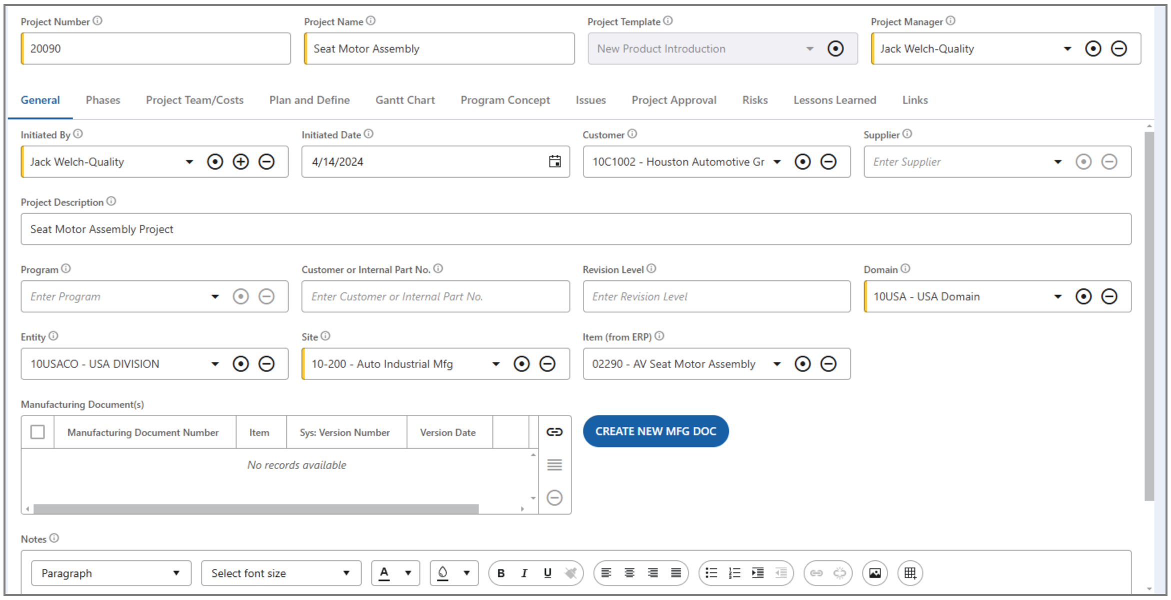
Projects

Projects are used to track the tasks, checklists, and approvals associated with launching a new product or making a change to an existing product. Generally, the project is created before a manufacturing document.

This process utilizes two Command functions:

- **Add New Project Roles from Project Tasks.** Allows adding new project roles from project tasks if any tasks in the project were modified by adding roles.
- **Update Risks from Library.** Creates new risks from risk libraries that contain the risk driver Projects.

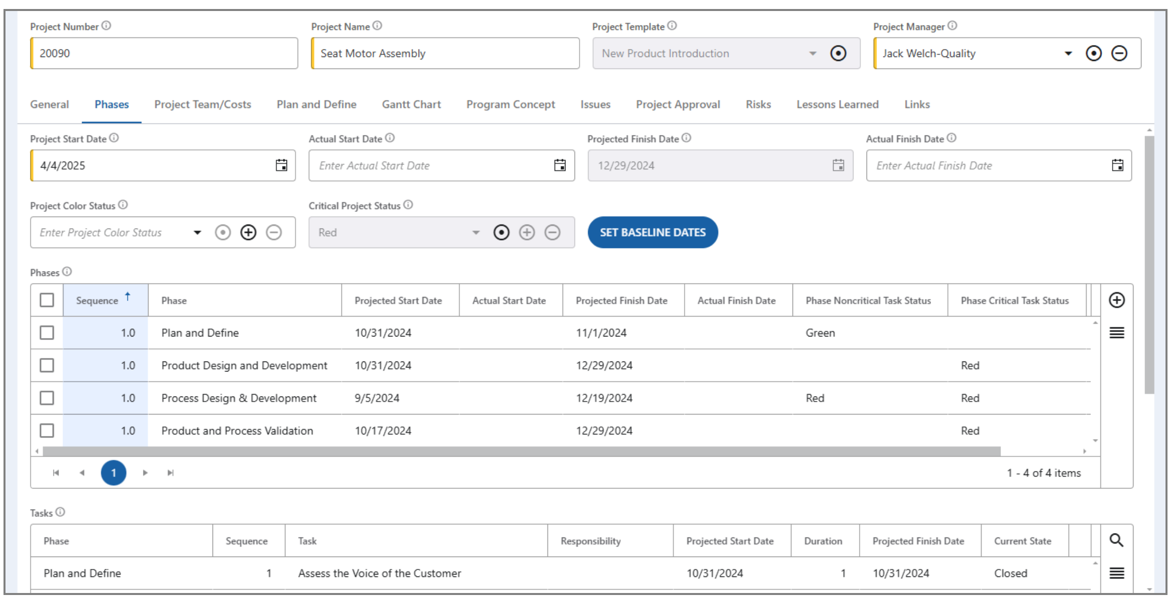
Fig. 35: Projects screen, General tab



The General tab is used to define the basic details of a project, including the name and number, project type, program, item, manufacturing document, and more.

The Project Type field controls the phases and project roles.

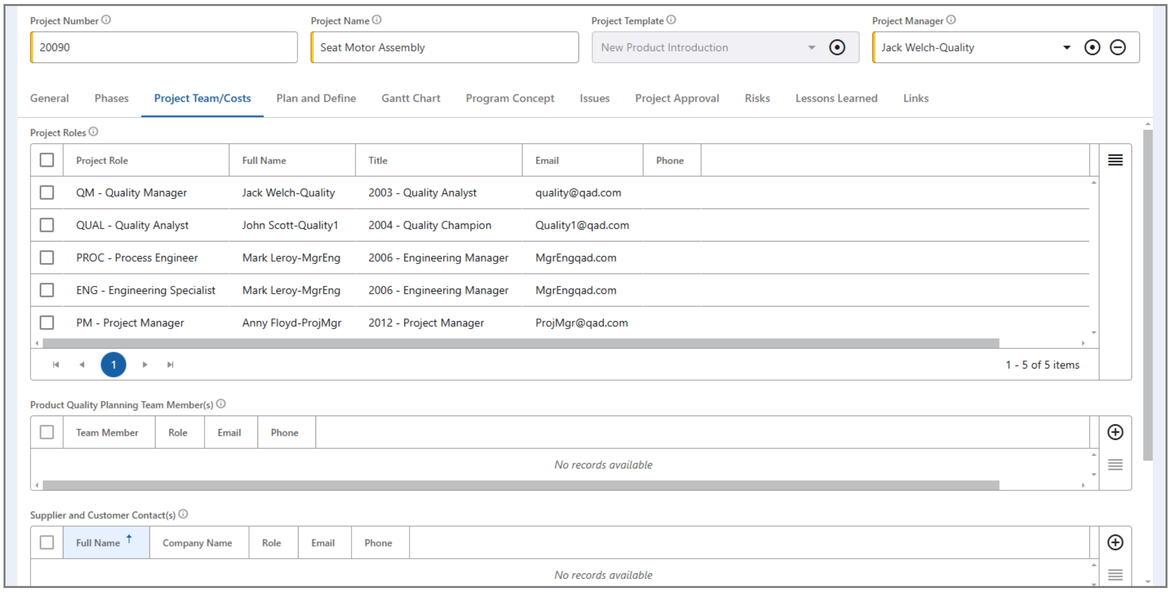
Fig. 36: Projects screen, Phases tab



Use the Phases tab to set the project start and target completion dates. This tab also hosts the list of phases defined for the project. The Phases field is automatically filled from the Project Type field; however, it can be manually completed as well.

The Project Start Date value is used to calculate any project tasks' due date. Once this value is selected and the record is saved, the Critical Project Status field should be green. You can also add manual color coding with the Project Color Status field.

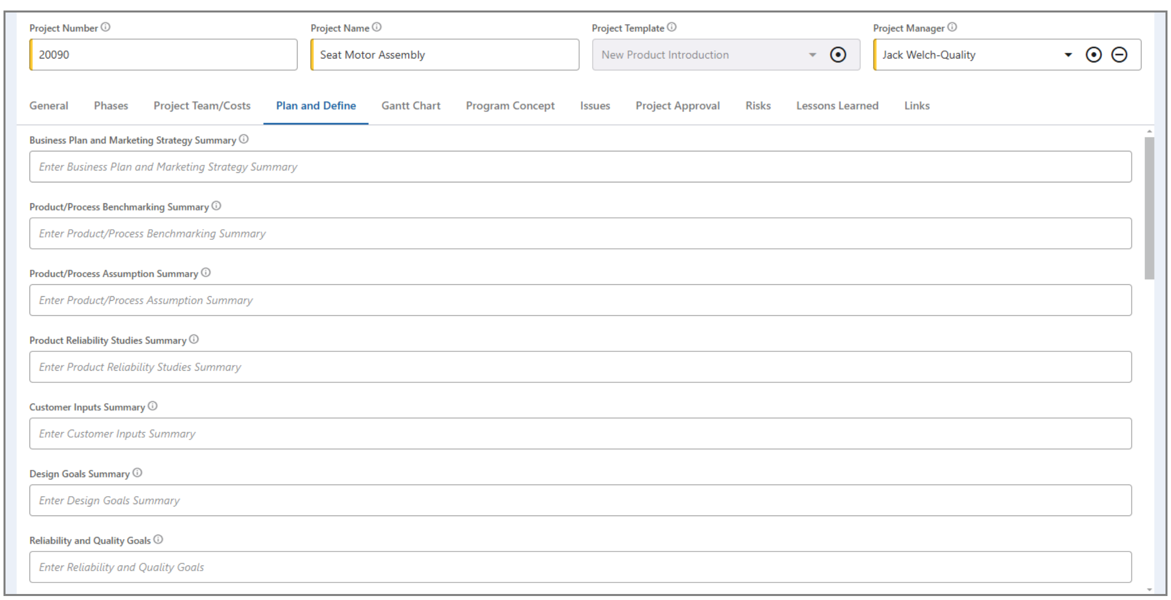
Fig. 37: Projects screen, Project Team/Costs tab



The Project Team/Costs tab holds the project role assignments for the project, as well as the cost log items associated with the project.

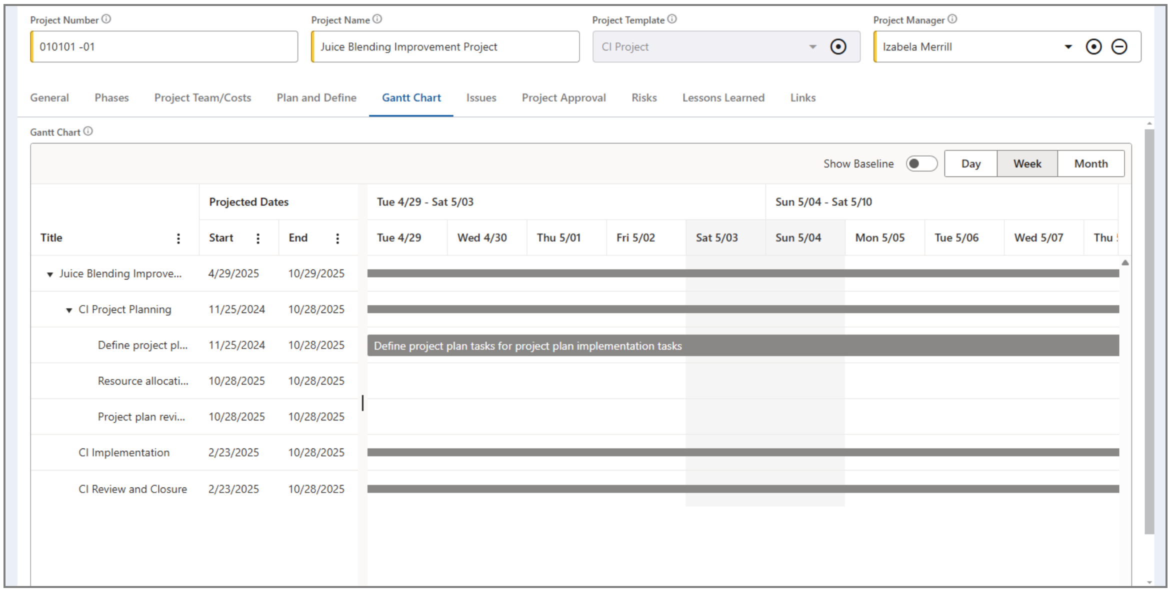
The project roles import from the library phases. If new project roles are later added to one or more phases, then update the Project Roles field by using the command "Add New Project Roles from Project Tasks".

Fig. 38: Projects screen, Plan and Define tab



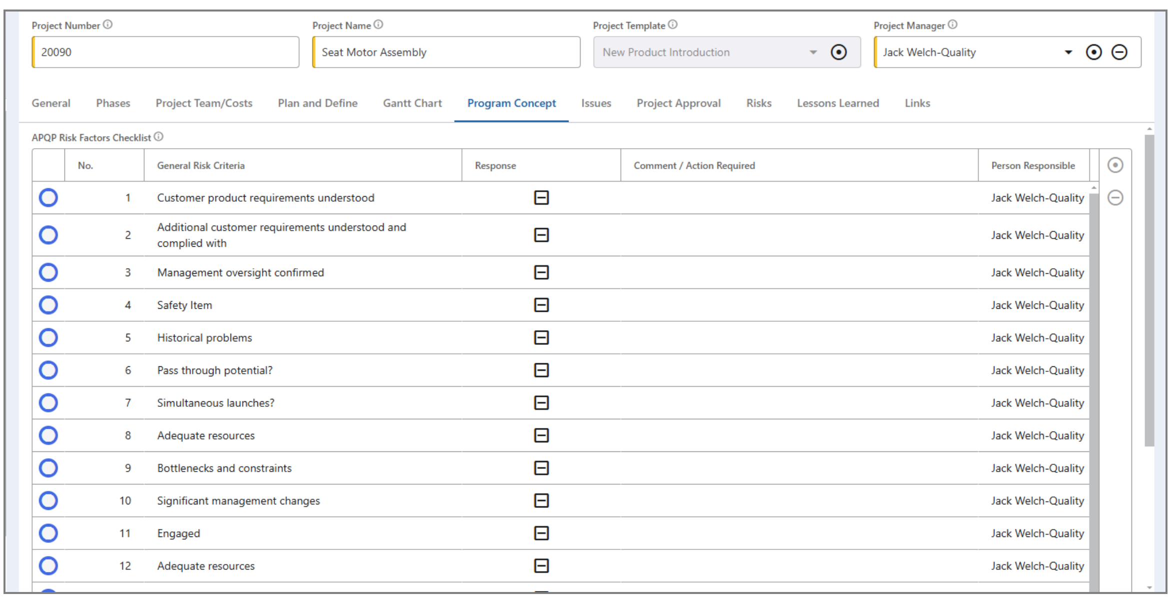
The Plan and Define tab provides a space to summarize strategies, benchmarking, goals, reliability studies, and other important aspects of a project.

Fig. 39: Projects screen, Gantt Chart tab



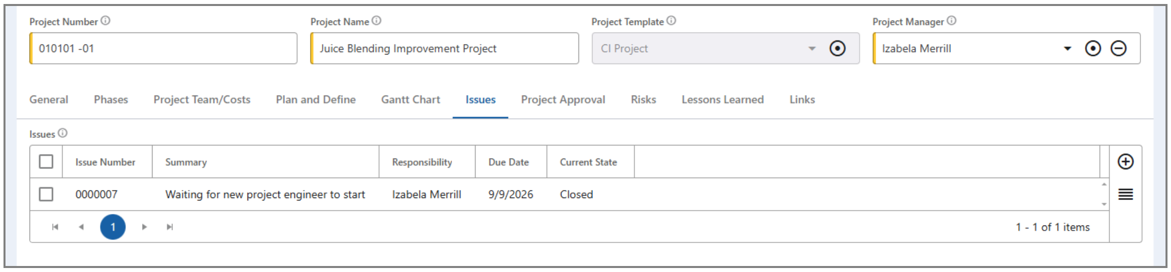
The Gantt Chart tab displays the project schedule in a Gantt chart, which allows for easy understanding of the project status.

Fig. 40: Projects screen, Program Concept tab



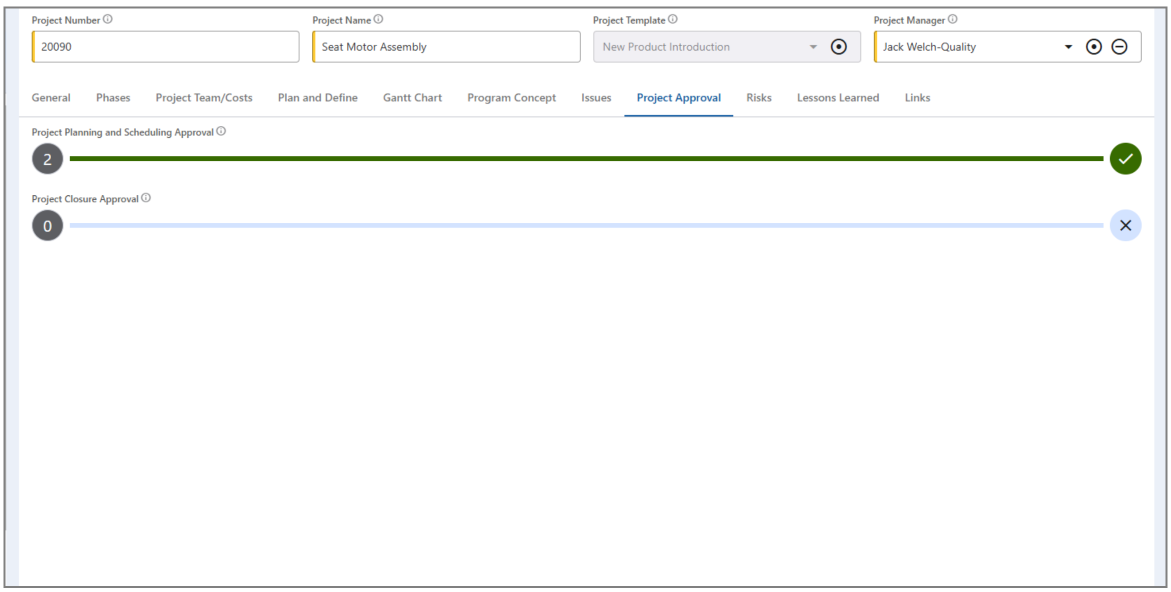
The Program Concept tab contains a checklist, which is used to evaluate the risk factors of a project.

Fig. 41: Projects screen, Issues tab



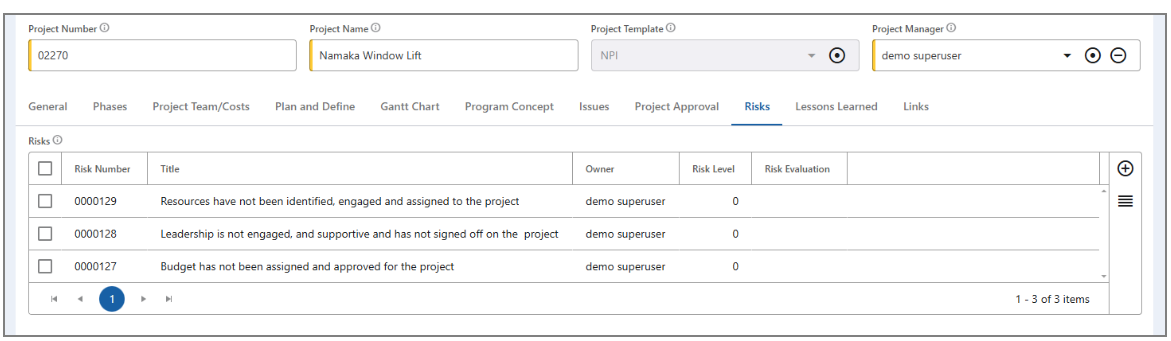
The Issues tab contains a list of issues associated with the project, and allows you to add new issues. See "Issues" on page 40 for more information, including how to complete a new issue.

Fig. 42: Projects screen, Project Approval tab



The Project Approval tab lists the employees responsible for approving the completed project. Approvers can approve directly from this tab.

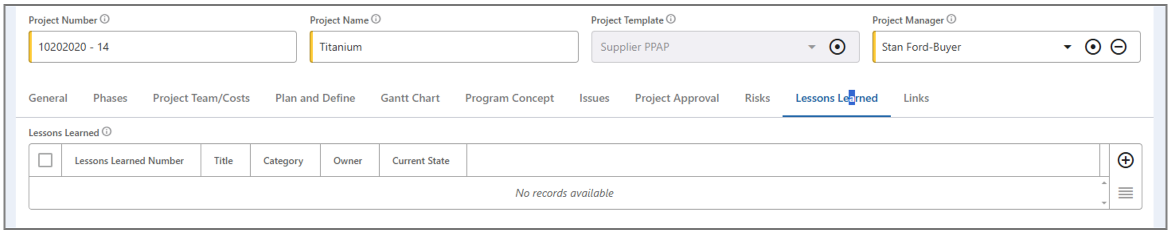
Fig. 43: Projects screen, Risks tab



The Risks tab contains a list of risks associated with the project, and allows you to add new risks. See "Risks" in the Risk Management user guide for more information, including how to complete a new risk.

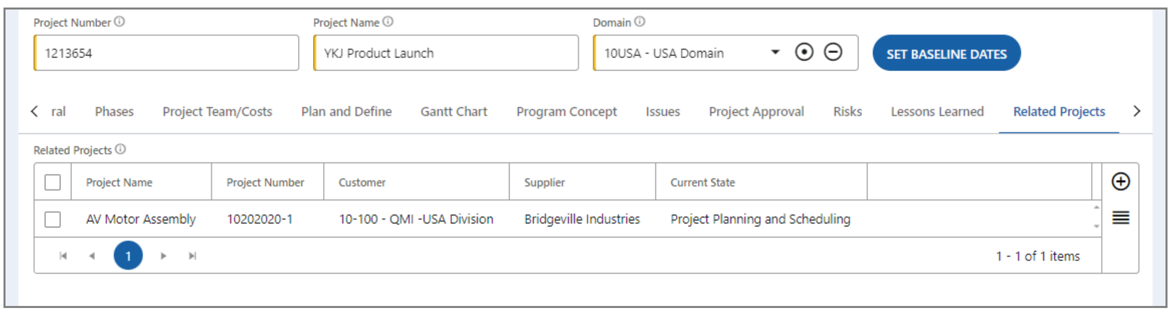
This field may be automatically completed with one or more risks created from risk libraries that utilize a risk driver connected to the system risk driver Projects. If a new risk library is created, use the command "Update Risks from Library" to add new risks to this tab.

Fig. 44: Projects screen, Lessons Learned tab



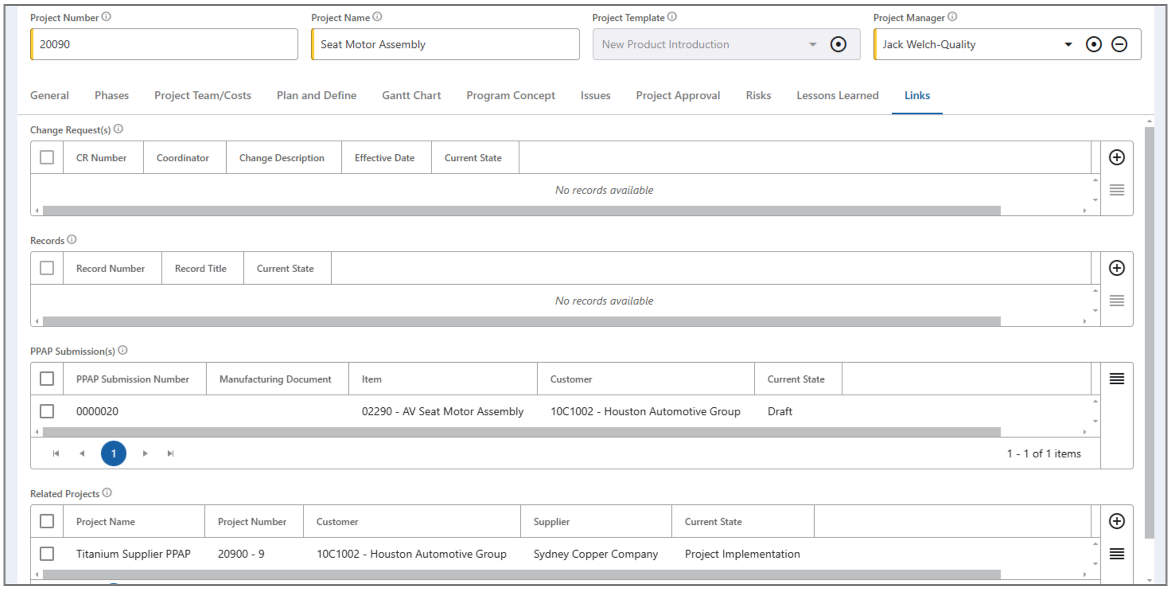
Use the Lessons Learned tab after the project approval to create one or more lessons learned based on the completion of the project. See "Lessons Learned" on page 66 for more information, including how to complete a new lesson learned.

Fig. 45: Projects screen, Related Projects tab



Use the Related Projects tab to associate other projects to the master project that you are completing.

Fig. 46: Projects screen, Links tab



Use the Links tab to add one or more records that were created based on the project, such as communication to the supplier or a diagram. Upon the first project save, the PPAP Submissions field populates. See "Records" in the Document Control user guide for more information, including how to complete a new record.

Projects States

This section defines each state available in the workflow for the Projects process. See "State Change Security" on page 89 to learn more about how these states transition.

Project Planning and Scheduling. The initial state of a new project. Preliminary data is being completed, including project gates and tasks.

Project Planning and Scheduling Approval. The first approval of the project. Approval at this stage acknowledges that the project plan and scheduling is acceptable.

Project Planning Rejected. The project plan was rejected. The employee responsible for completion should address any of the comments noted in the rejection and re-submit for approval.

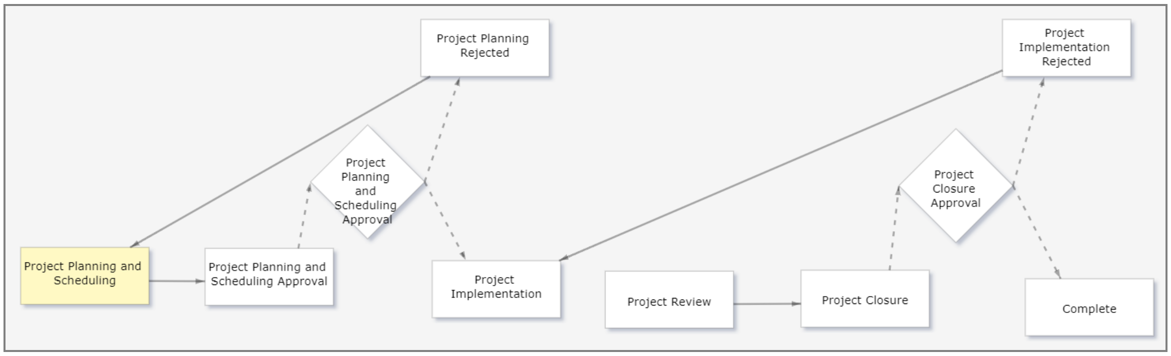
Project Implementation. The project tasks are assigned and in the process of being completed.

Project Review. All tasks and gates have been completed. Enter lessons learned, links, and other project artifact data.

Project Closure. All information is entered and the project is ready for the final approval process. The project manager and (if specified) stakeholders must sign off on the project.

Project Implementation Rejected. The project was rejected and the state will return to Project Implementation.

Complete. The project has been completed and all approvers have signed off.



Projects Tasks

Adding a New Project

1. Select Projects from the left navigation panel. Then, click the Add Item ⊞ button in the toolbar.
2. Create a unique number and name for the project.
3. Use the following drop-down fields to fill out the General tab:
    - Project Template
    - Supplier
    - Customer
        - This field is required if you are conducting a PPAP.
    - Program
    - Item (from ERP)
        - If the item does not already exist in the ERP, then type the item in the Item (pre-ERP) field instead.
    - Project Manager
    - Manufacturing Document
4. Enter a detailed project description and any additional notes.
5. Navigate to the Phases tab. Select a project start date.
6. Click Save to save the new record. When selecting the next state, click Project Planning and Scheduling.

Note that the following fields in the project now contain values:

- Project Target Completion Date
- Phases
- Tasks
- Project Roles
- Risks

Completing a Project

1. In the Project detail screen, navigate to the Phases tab.
2. Double-click the first phase; a new screen appears. See "Projects Tasks" on the next page to learn more about using the phases to assign and complete each project task.
3. Back in the Project detail screen, navigate to the Project Team/Costs tab. Double-click a project role; a new screen appears. Select a name in the Responsibility or Approver drop-down field to assign a person to the project role. Then save the change.

   Note: The Project Roles field values are generated from the approver roles in the project library tasks.

5. Click the Add New Item ⊕ button in the Cost Log field. See "Cost Logs" in the Tooling and Equipment Management user guide to learn how to add a cost log to the project.
6. Navigate to the Issues tab. Click the Add New Item button and follow the steps in "Adding a New Issue" on page 44 to add a new issue.
7. Navigate to the Risks tab. Click the Add New Item button. See "Risks" in the Risk Management user guide to learn how to add a new risk.

   Note: This field may be automatically completed with one or more newly created risks. You may choose to double-click and edit these items instead of using the Add New Item button.

8. Navigate to the Related Projects tab. Click the Add New Item button. In the new tab, click the Child Project drop-down field to select a related project, then click Save to save the record.
9. Back in the Project detail screen, click Save to save the record. When selecting the next state, click Project Planning and Scheduling Approval.

Approving a Project

Approval for the project comes in two parts. The first approval occurs during the Project Planning and Scheduling Approval state, and is intended to acknowledge that the project plan and scheduling is acceptable.

1. The person responsible for approving a project is automatically notified when it is time for approval through the inbox or optionally from an e-mail notification (clicking the link in that message takes you to the project for approval).
2. Open the inbox, either through the Home Page dashboard or by clicking the Inbox icon in the toolbar.
3. Upon opening the inbox, click the approval item under the group to show the action icons. Then click the Open icon. The screen navigates to the project's detail screen.
4. In the detail screen, navigate to the Project Approval tab and click the Approve/Reject button. A small window appears.
5. In the Sign Off window, enter your password and either approve or reject the change. Use the comments field to document any information about your decision. Comments are required for rejection.

Once all members of the approval process have finished, the project moves to the state Project Implementation. From here, project tasks are assigned and in the process of being completed.

After every project task has been completed, the state is moved to Project Review. Before the second part of the project approval can be finished, some additional tasks must be completed.

6. Open the project's detail screen and navigate to the Lessons Learned tab. Then click the Add New Item ⊕ button. See "Lessons Learned" on page 66 to learn how to add a new lesson learned.
7. Navigate to the Links tab. Then click the Add New Item button to add a record to the project. See "Records" in the [Document Control] user guide to learn how to add a new record.
8. Click Save to save the record. When selecting the next state, select Project Closure.
9. Repeat steps 1-5 to conclude the second part of the project approval.

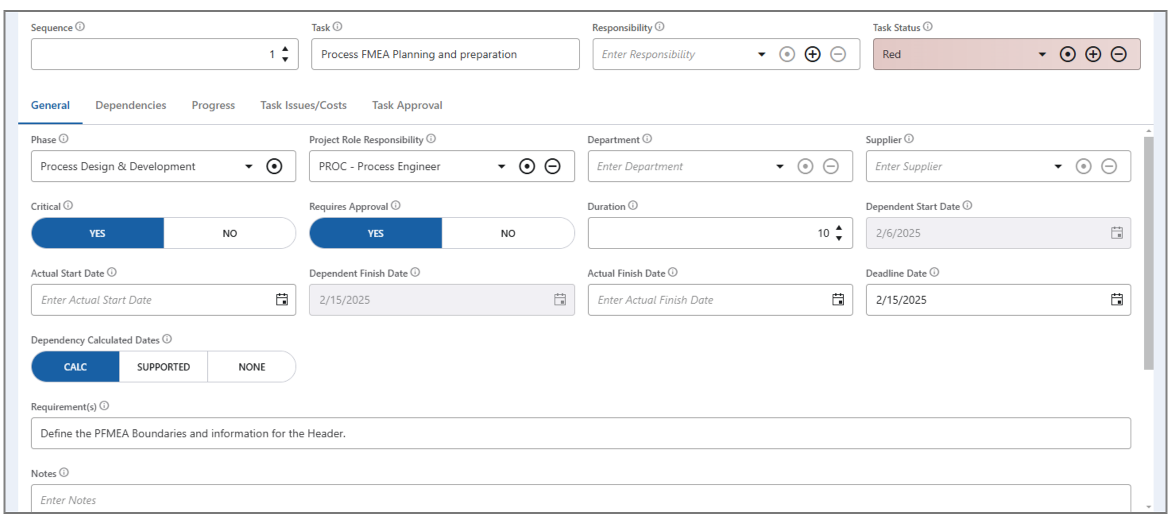
Projects Tasks

Project tasks are responsibilities assigned to individuals that must be completed as part of bringing a project to fruition.

Tasks can be assigned to an individual employee, a project role that a person is assigned to, or a supplier. Once a task is assigned, the responsible person receives a notification and they can begin completing each item in the task checklist, keeping track of their progress as they work.

Project Tasks are created in the Projects Gate Library process and used in the Projects process. See "Project Phases Library" on page 24 and "Projects" on page 48.

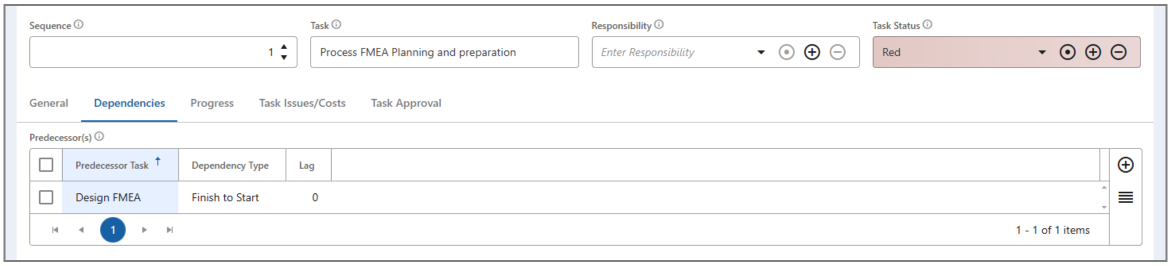
Fig. 47: Projects Tasks screen, General tab



The General tab is used to define the basic details of a project task, including the task description, assigned responsibility, duration, sequence, and more.

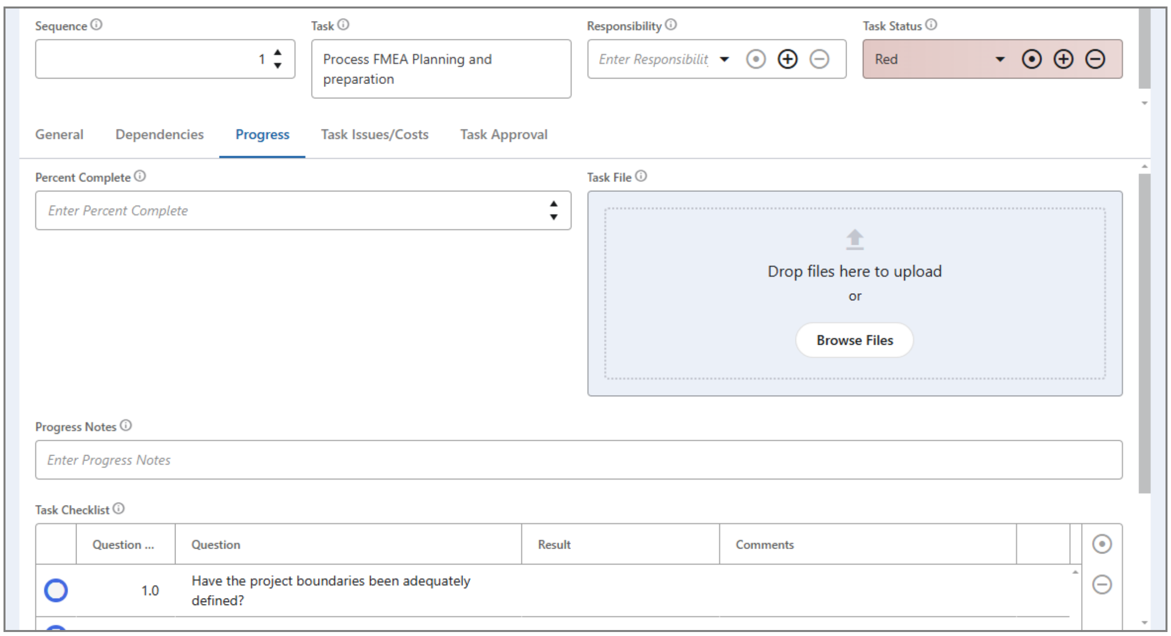
Task start dates and finish dates can either be calculated (based on task dependencies) or can be manually changed if the task is not linked to another via the dependency set up.

Fig. 48: Projects Tasks screen, Dependencies tab



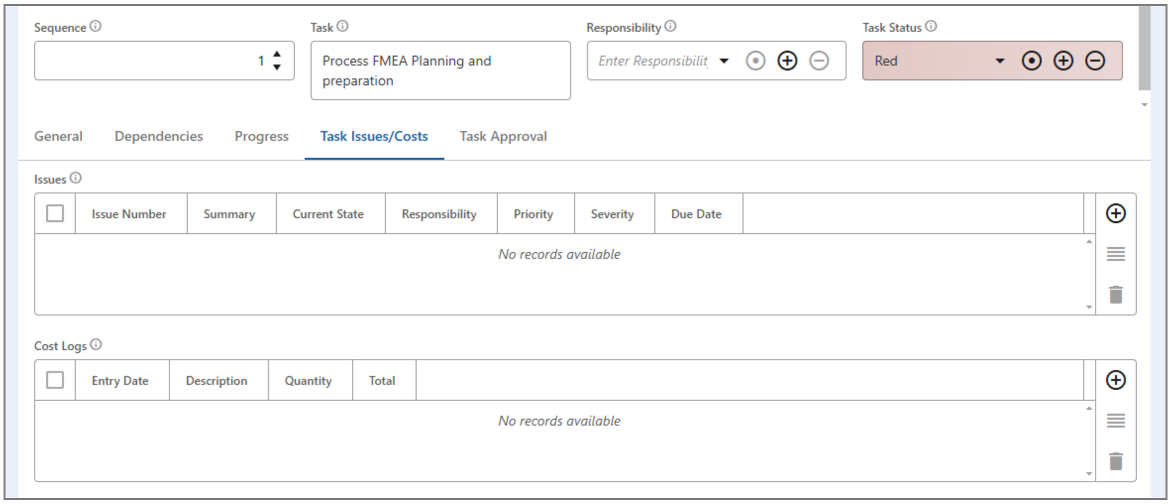
Use the Dependencies tab to select tasks that the current task depends on. The Dependencies field may already contain predecessor tasks, which were automatically brought in from the project type gates. See "Project Tasks Library" on page 26 to learn more about adding dependencies.

Fig. 49: Projects Tasks screen, Progress tab



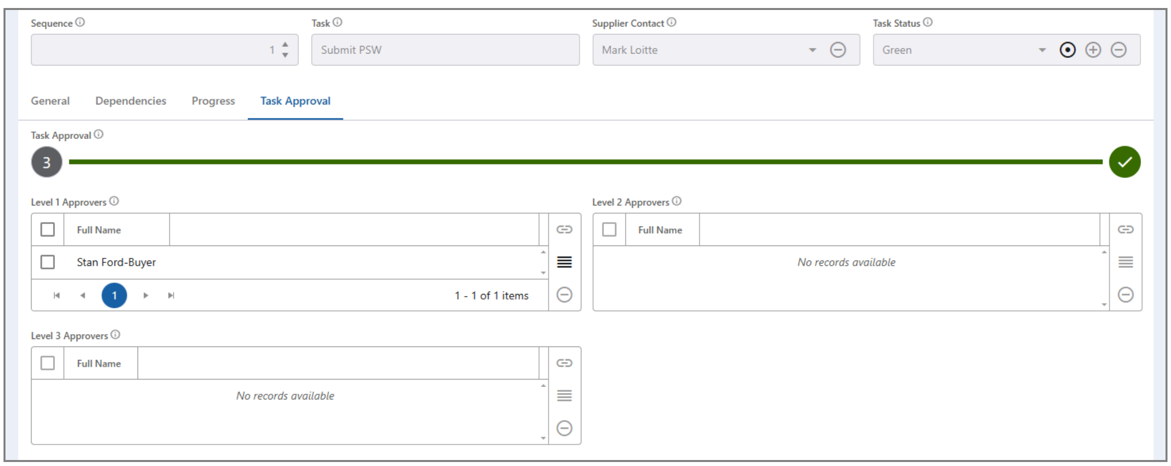
Use the Progress tab to track your progress as you complete all items in the task checklist. Note that the Percent Complete field must be calculated manually.

Fig. 50: Projects Tasks screen, Task Issues/Costs tab



Use the Task Issues/Costs tab to log and track issues and costs as they arise. See "Issues" on page 40 to learn how to add issues, and "Cost Logs" in the [Gauge Management]() user guide to learn how to add cost logs.

Fig. 51: Projects Tasks screen, Task Approval tab



Use the Task Approval tab to approve a project task. Once all approvers have signed off, the project task state becomes Approved and is considered complete.

Projects Tasks States

This section defines each state available in the workflow for the Projects Tasks process. See "State Change Security" on page 89 to learn more about how these states transition.

New (Default). A new project task that is not yet ready to be approved.

Assigned. The project task has been assigned to a user for completion.

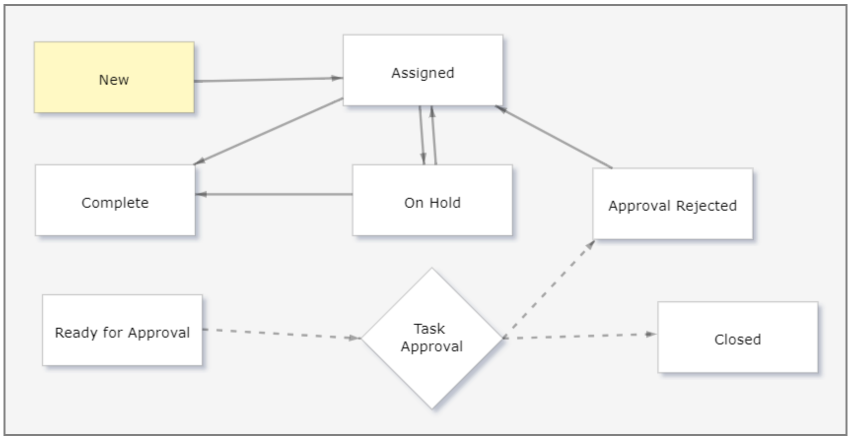
On Hold. The project task has been put on hold.

Complete. The project task is completed and ready to be reviewed and approved.

Ready for Approval. Notification is sent to the project task approvers. They must review and approve the task.

Approval Rejected. The project task was rejected and the state returns to Assigned.

Closed. The project task is approved and is now complete.



Project Tasks

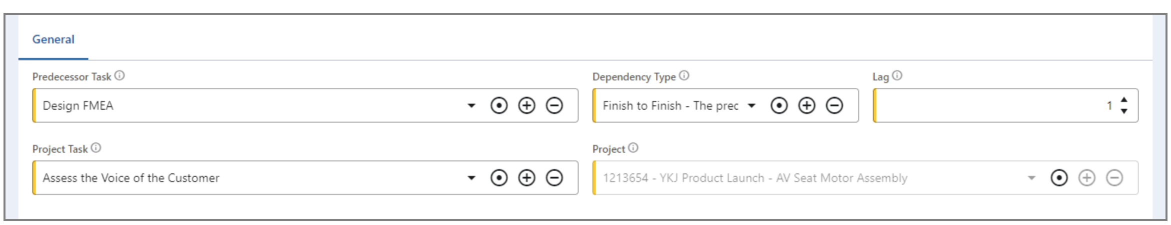
Completing a Project Task

Once a project is created and the gates are generated, open a gate and double-click a task from the General tab to open it and begin setting it up.

1. In the General tab, notice that many fields are already completed. This data is from the Project Gates Library process. See "Project Phases Library" on page 24 for more information.
2. Navigate to the Dependencies tab. If the task depends on predecessor tasks, then click the Add New Item button to add a new dependency. A new screen opens.

   Note: The Dependencies field may already contain predecessor tasks, which were automatically brought in from the project type gates. See "Adding a New Project Template " on page 24 for more information.

   Fig. 52: Projects Tasks Dependency screen



3. In the Projects Tasks Dependency screen, select a predecessor task and a dependency type in the appropriate drop-down fields.

4. In the Lag field, select the number of days between the Predecessor task and the Projects task.
5. Click Save to save the new record. The screen returns to the Project Task screen.
6. Navigate to the Progress tab. Note the Task Checklist field, which already contains data. As you complete each task in the checklist, click the Result column in that task's row to select your answer to the question. You can also click the Comments column to add a comment.
7. As you work through the checklist, use the Percent Complete field to indicate how complete the project task is. You can also enter progress notes.
8. Navigate to the Task Issues/Costs tab. As issues and costs arise, you can click the Add New Item button in either the Issues field or the Cost Logs field to log that information. See "Issues" on page 40 and "Cost Logs" in the Gauge Management user guide for more information.
9. When the task is complete, click Save to save the record. In the event that the task requires approval (based on the library task set up), the task automatically moves to the state Ready for Approval.

   Note: You can add additional approvers in the Task Approval tab. Be sure to add these approvers before the task is saved to the state Complete.

Approving a Project Task

1. The person responsible for approving a project task is automatically notified when it is time for approval through the inbox or optionally from an e-mail notification (clicking the link in that message takes you to the task for approval).
2. Open the inbox, either through the Home Page dashboard or by clicking the Inbox icon in the toolbar.
3. Upon opening the inbox, click the approval item under the APQP group to show the action icons. Then click the Open icon. The screen navigates to the task's detail screen.
4. In the detail screen, navigate to the Task Approval tab and click the Approve/Reject button. A small window appears.
5. In the Sign Off window, enter your password and either approve or reject the change. Use the comments field to document any information about your decision. Comments are required for rejection.

   Note: Once all members of the approval process have finished, the task moves to the state Approved.

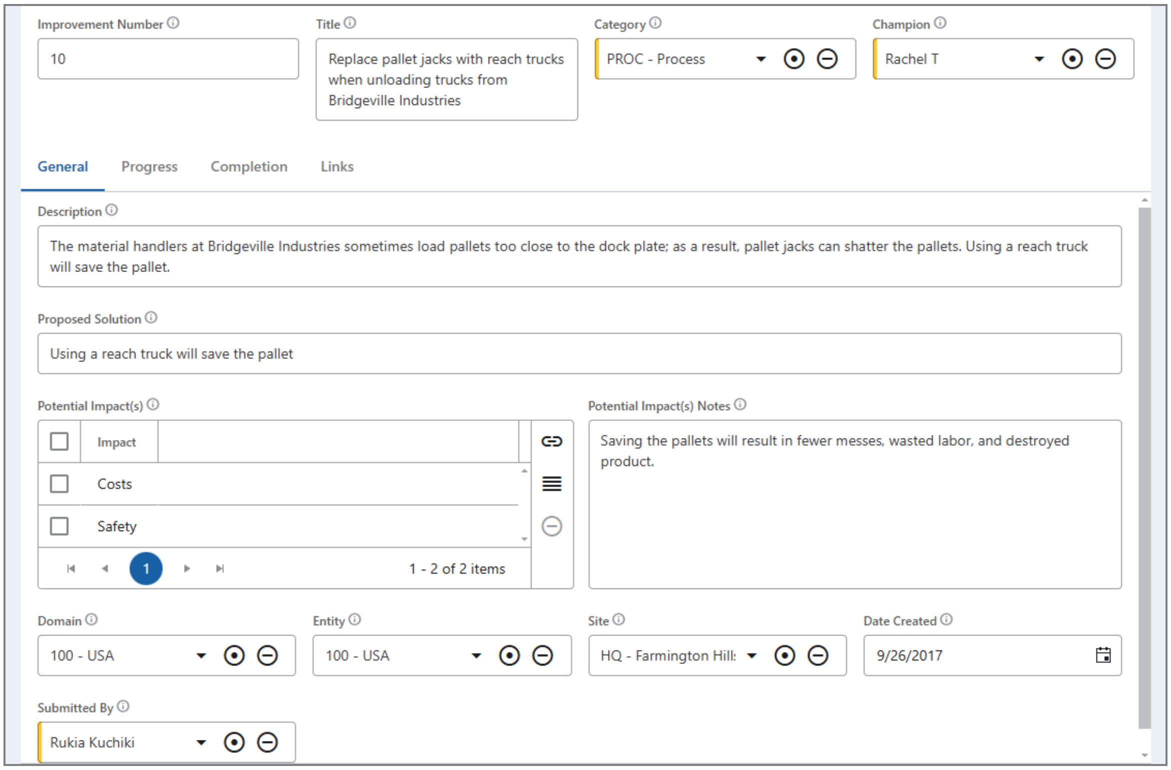
Improvements

Improvements are used to document and manage ideas to improve areas of the organization. Often, improvements can be thought of as an electronic suggestion box. If accepted, an improvement can be tracked through completion using actions associated with the improvement.

The decision to deny an improvement does not obsolete the record. An improvement may be denied because it is not currently feasible due to current resources, or perhaps it just needs to be benched until current projects are completed. Whatever the reason, users can return to a denied improvement later and transition the state to Planned.

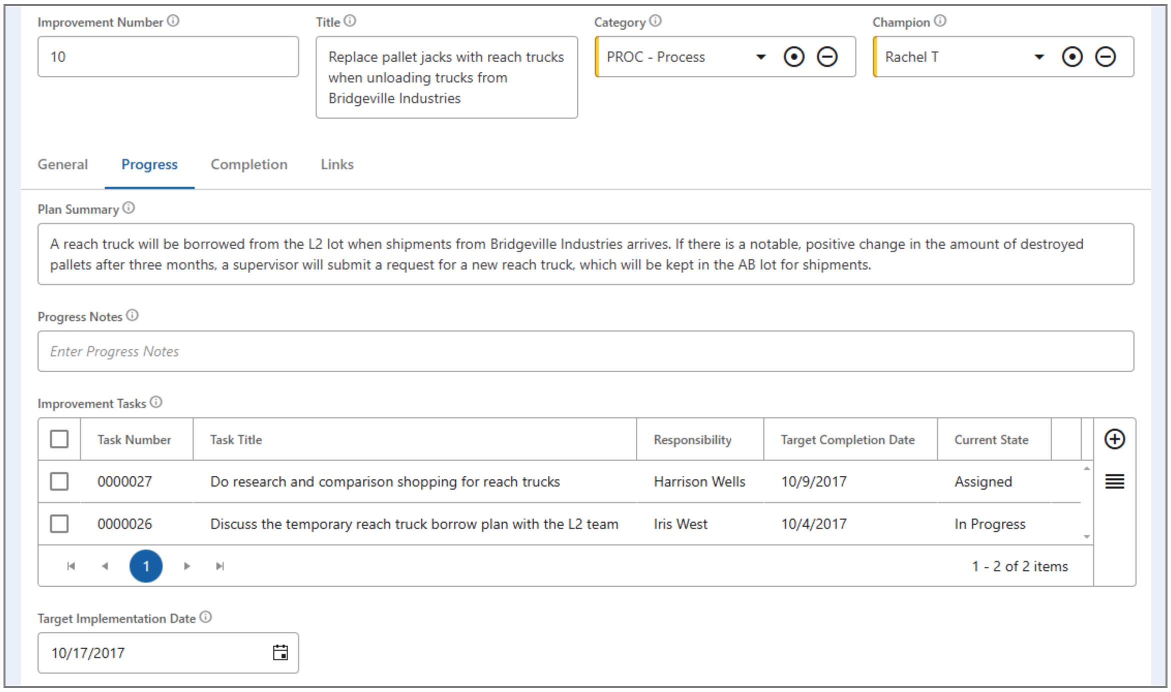
Improvements can be logged anonymously, depending on the Improvement Category. See "Improvements Categories" on page 32. Once an improvement is complete, it can be used to create one or more lessons learned. See "Lessons Learned" on page 66.

Fig. 53: Improvements screen, General tab



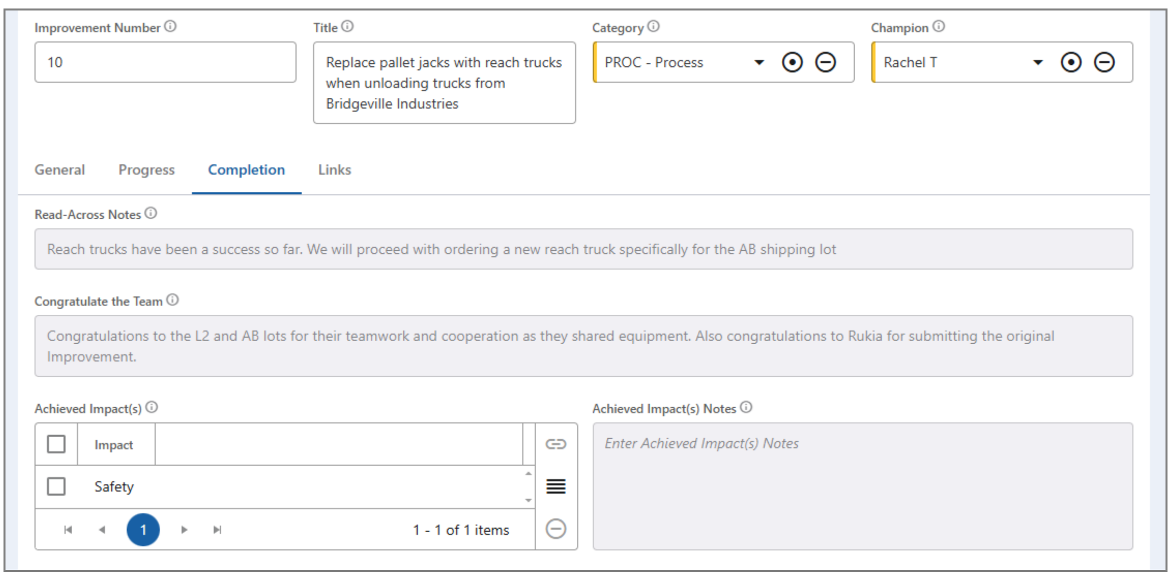
The General tab is used to define the basic details of an improvement, including a description of the suggested solution and notes about the potential impacts.

Fig. 54: Improvements screen, Progress tab



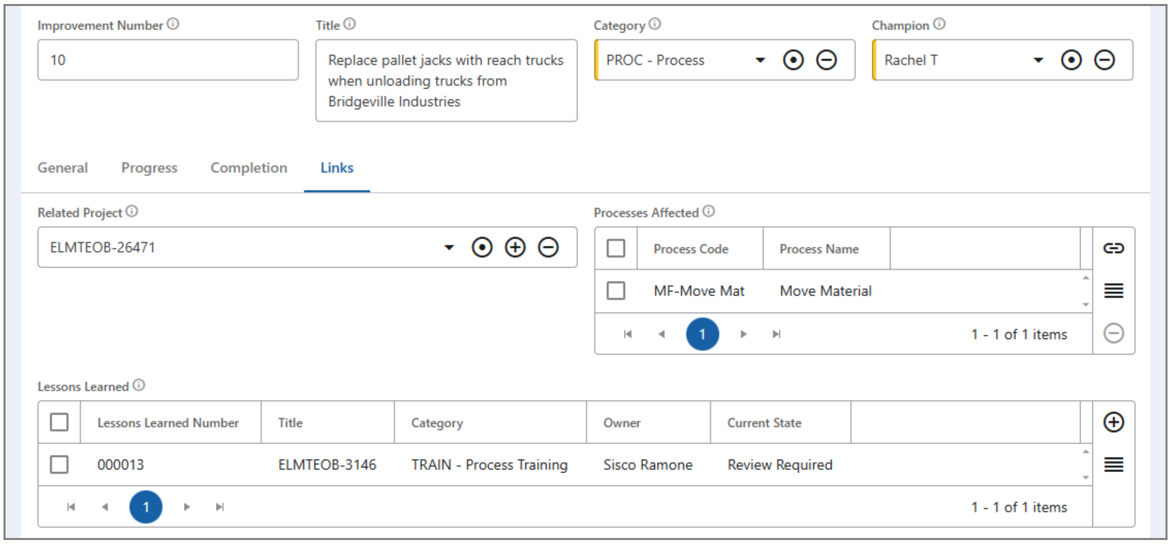
Use the Progress tab to record your steps as you complete the improvement. Add problem solving tasks through the Improvement Tasks field.

Fig. 55: Improvements screen, Completion tab



Once the improvement is complete, use the Completion tab to record how this improvement may affect other areas of the workplace, congratulate the team, and identify the impacts that the improvement achieved.

Fig. 56: Improvements screen, Links tab



Use the Links tab to link the improvement to a related project, any processes affected, and relevant lessons learned.

Improvements States

This section defines each state available in the workflow for the Improvements process. See "State Change Security" on page 89 to learn more about how these states transition.

Draft (Default). The improvement is still being drafted and not yet ready to be submitted.

Submit. The improvement draft has been submitted for review.

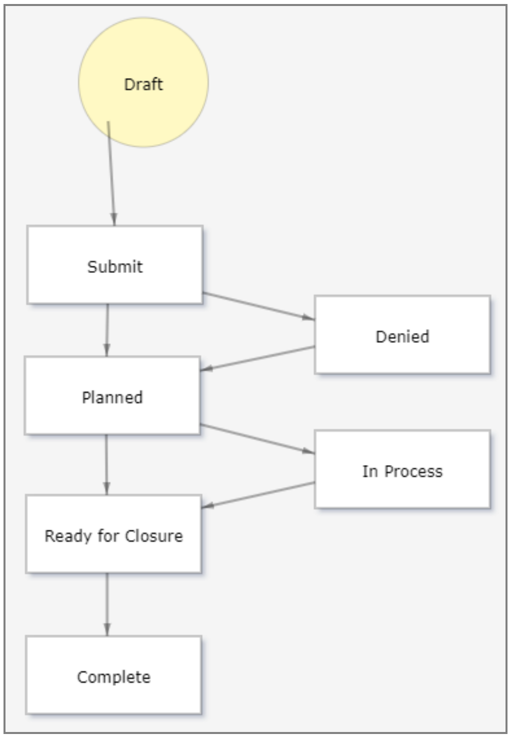
Denied. The improvement submission has been reviewed and denied.

Planned. The improvement submission has been reviewed and is planned to be enacted.

In Process. The improvement is in process but not yet complete.

Ready for Closure. The improvement is ready to be closed, after the Champion has filled out the Completion tab.

Complete. The improvement is complete.



Improvements Tasks

Adding a New Improvement

1. Select Improvements from the left navigation panel. Then, click the Add Item button in the toolbar.
2. Select a category and site for the improvement.
3. Enter a summary title.
4. Enter a detailed description of the improvement, which should include the problem that the improvement will refine.
5. Enter a detailed description of the proposed solution.
6. Select potential impacts of completing the suggested improvement and explain how the improvement will affect these impacts.
7. Before you submit the improvement, if you want to remain anonymous, then select the "Log Improvement as Anonymous" check box.
8. Click Save to save the new record. When selecting the next state, click Submit.

Completing an Improvement

The improvement champion defaults according to the improvement category selected by the submitter. The champion receives an inbox item.

1. Once you have opened the assigned improvement from the inbox, navigate to the Progress tab.
2. In the Plan Summary field, enter a detailed description of the plan to complete the improvement. Then click Save to save the record and select the Planned state.

3. Create improvement tasks to assign and track the detailed items that will implement the improvement upon completion. See Problem Solving Tasks in the NCR & CAPA user guide to learn how to add an improvement task.
4. In the Completion tab, use the Read-Across Notes field to describe how the improvement may be applied to similar processes.
5. Once the improvement has been implemented, use the Congratulate the Team field to write an encouraging and congratulatory message to the team that worked on the improvement.
6. Select one or more impacts that were achieved as a result of the improvement.
7. In the Links tab, select any related projects or processes that were affected by the newly implemented improvement.
8. Create one or more lessons learned based on the completion of the improvement. See "Lessons Learned" below to learn how to add lessons learned.
9. Click Save to save the record. When selecting the next state, click Complete.

   Note: If you are working on the improvement but are not yet finished, save the record and select the In Progress state.

Denying an Improvement

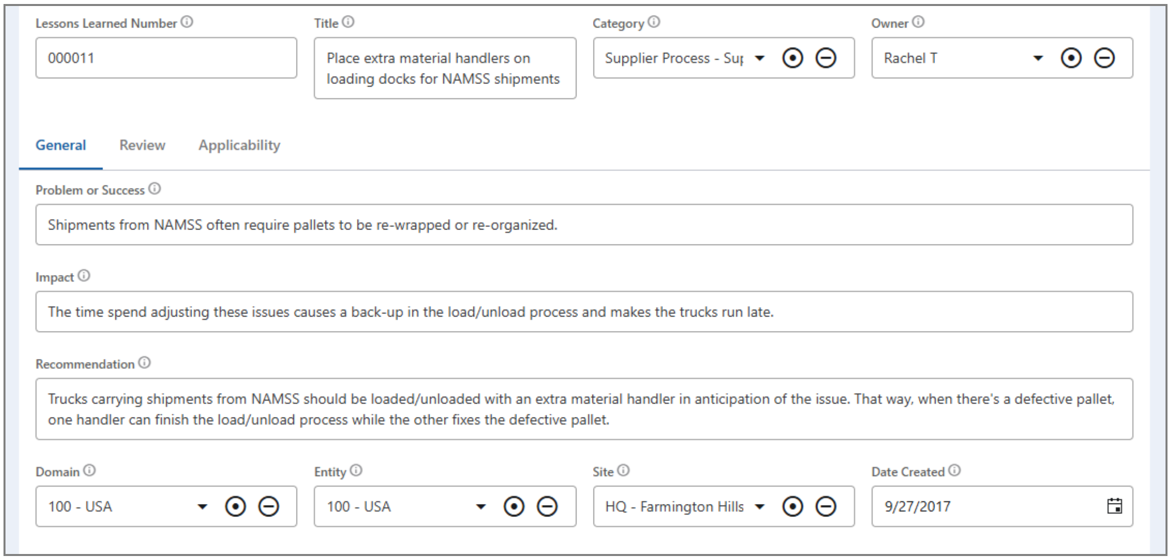
The improvement champion defaults according to the improvement category that the submitter selected. The champion receives an action item.

1. Once you have opened the assigned improvement from the inbox, navigate to the Progress tab.
2. In the Plan Summary field, enter a detailed description of the decision to not complete the improvement.
3. Click Save to save the record. When selecting the next state, click Deny.

Lessons Learned

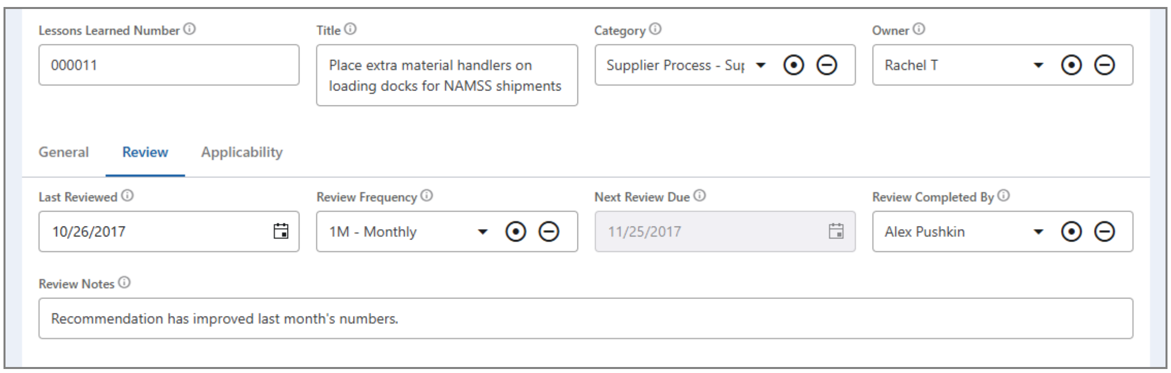
Lessons learned is a common concept in most organizations. They can be used to document and manage lessons that people have learned either through the solving of a problem or the completion of an improvement. The lessons can also be reviewed periodically to ensure they are still relevant to the organization. During certain planning activities, lessons learned should be reviewed to ensure they are incorporated into the activities being planned. Lessons learned can be created and linked to nonconformances, projects, issues, risks, and improvements.

Fig. 57: Lessons Learned screen, General tab



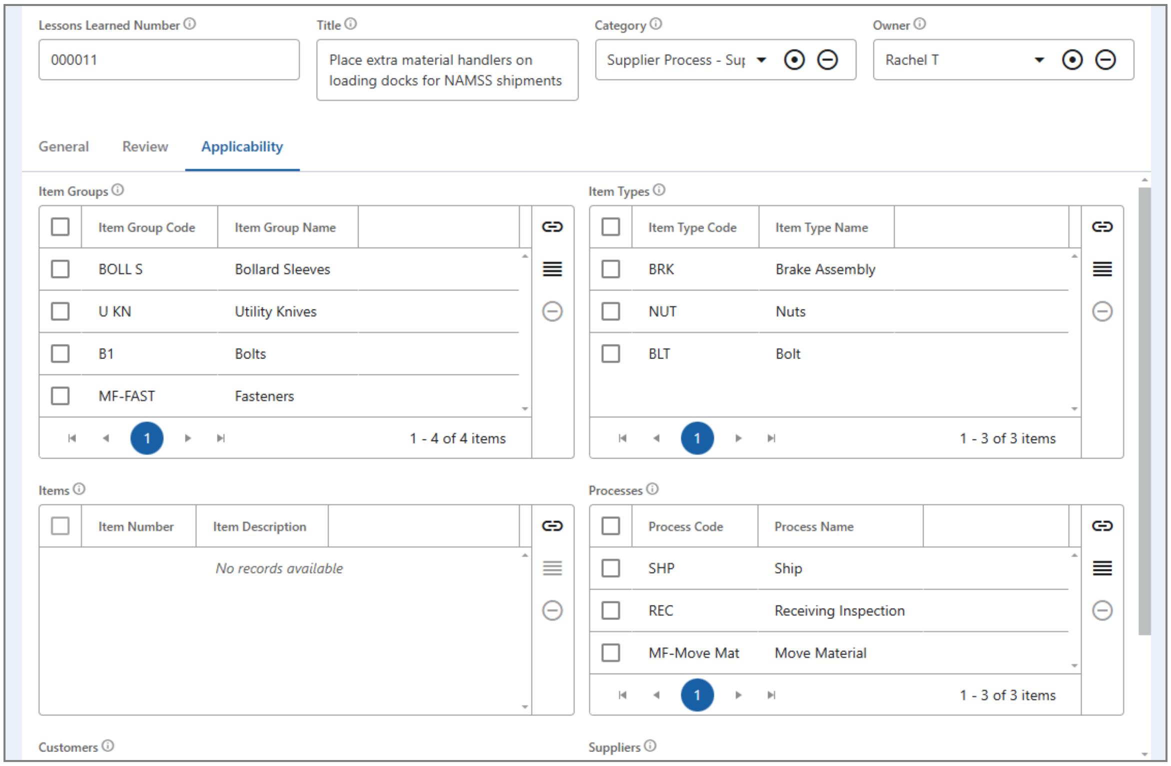
The General tab is used to define the basic details of a lesson learned, including the title, problem or success, impact, and recommendation.

Fig. 58: Lessons Learned screen, Review tab



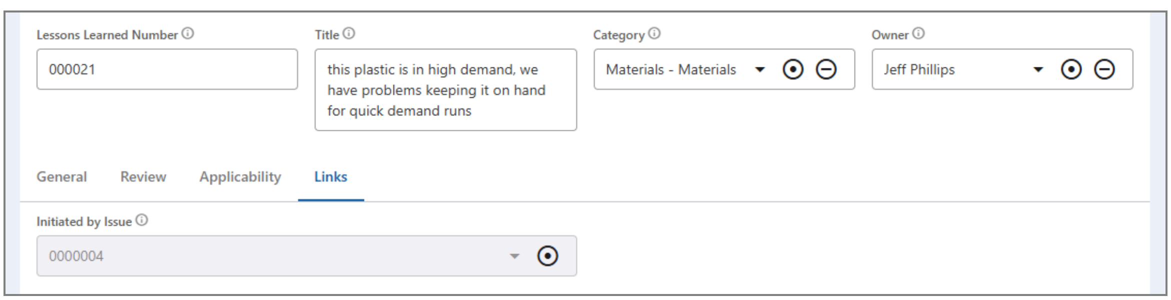
Use the Review tab to set a review frequency, track review notes, and observe the last and next review dates.

Fig. 59: Lessons Learned screen, Applicability tab



Use the Applicability tab to select one or more item, item groups, item types, processes, customers, and suppliers that the lesson learned applies to.

Fig. 60: Lessons Learned screen, Links tab



If a lesson learned was generated from a nonconformance, project, issue, risk, or improvement, then the original record is automatically selected in the appropriate drop-down field in the Links tab. Any unused fields are hidden.

Lessons Learned States

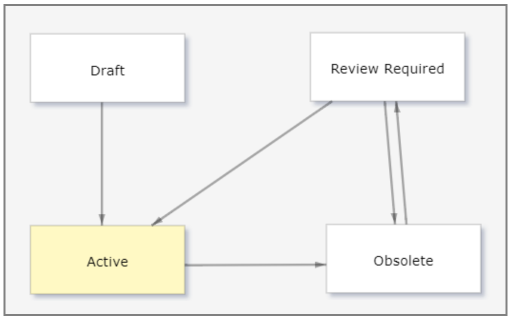
This section defines each state available in the workflow for the Lessons Learned process. See "State Change Security" on page 89 to learn more about how these states transition.

Draft (Default). A lesson learned that is still being drafted.

Active. A lesson learned that is actively used.

Review Required. The lesson learned requires a review to be completed before it can return to Active or transition to Obsolete.

Obsolete. The lesson learned has expired or is obsolete.



Lessons Learned Tasks

Adding a New Lesson Learned

1. There are two ways to add a new lesson learned:
    a. Select Lessons Learned from the left navigation panel. Then, click the Add Item button in the toolbar.
    b. From a project or issue record, navigate to the Lessons Learned field and click the Add New Item button. You can also initiate a lesson learned from a risk, nonconformance, or improvement record.
2. Select a category for the lesson learned.
3. Enter a summary title.
4. Enter a detailed description of the problem or success.
5. Enter a detailed description of how the lesson learned impacted the business or processes.
6. Enter a detailed description of what is recommended to solve or provide the same success in the case that this same item is encountered in the future.
7. Navigate to the Review tab. Select a review frequency and a user to complete future reviews.
8. Navigate to the Applicability tab. In each applicable field, use the Link button to select any records that the lesson learned applies to. Click OK when finished with each list.
9. Click Save to save the new record. When selecting the next state, click Active.

Reviewing a Lesson Learned

A review frequency is set when the lesson learned is created. When the Next Review Due field matches the current date, the record's state becomes Review Required and the owner receives a notification that they must review the lesson learned.

1. Double-click the lesson learned to be modified or open the file from the Assignment tab of the inbox.
2. Review the details in each tab of the detail screen.
3. After reviewing the record, navigate to the Review tab. Modify the Last Review and Review Completed By fields. Add notes if necessary.

4. Click Save to save the record. When selecting the next state:
    a. Click Active if the lesson learned is still in use.
    b. Click Obsolete if the lesson learned has expired or is obsolete.

Chapter 4

Inbox Messages

Introduction to Inbox Messages

Most processes in the QMS system require multiple people, departments, or groups to coordinate on completing a process. The inbox automates notifications sent to the appropriate users at specific times in the process.

An individual inbox action item represents a single task, approval, or notification that has been sent to you. This task will remain in your inbox until the necessary steps have been taken for completion.

Inbox messages can be separated into three different action types:

- **Assignment.** You are required to take some action in the system to move it beyond your workflow.
- **Approval.** Your approval is requested. You must approve or reject the process item.
- **Acknowledgment.** This is only for your information. You can acknowledge the notification to remove it from your inbox.

See the User Interface user guide to learn how to access inbox messages.

Inbox Messages

The table below describes each inbox action item involved in the Continuous Improvement module. In addition to title and description, the table indicates which process each item comes from, who receives the message, and when it is sent. See the User Interface user guide to learn more about inbox messages.

Process	Title	Message	Action Type	Sent To / Sent When
Improvements	Champion – Planned Improvement is Ready to Action	Improvement Number: {ImprovementNumber_f} Improvement Title: {Title_f} Improvement Description: {Description_f}	Assignment	Sent to Champion when the improvement moves to the Planned state.
Improvements	Champion – Ready to Submit	Improvement Number: {ImprovementNumber_f} Improvement Title: {Title_f} Improvement Description: {Description_f}	Notification	Sent to Champion when the improvement moves to the Submit state.

Process	**Title**	**Message**	**Action Type**	**Sent To / Sent When**
Improvements	Champion – Target Implementation Date has Elapsed	The following improvement is beyond its Target Implementation Date but has not yet been completed: Improvement Number: {ImprovementNumber_f} Target Implementation Date: {TargetImplementationDate_f}	Notification	Sent to Champion when the Target Implementation Date is passed and it is not completed.
Improvements	Submitted By – Denied	Improvement Number: {ImprovementNumber_f} Improvement Title: {Title_f} Improvement Description: {Description_f}	Notification	Sent to Submitted By when the improvement moves to the Denied state.
Issues	Responsibility – Assigned State	An issue with the following details has been assigned to you, please complete the issue: Summary: {Summary_f} DueDate: {DueDate_f} Priority: {Priority_f}	Assignment	Sent to the Responsibility role when the state becomes Assigned.
Issues	Responsibility – Past Due	The following issue is past due, please complete this issue as soon as possible: Summary: {Summary_f} DueDate: {DueDate_f} Priority: {Priority_f}	Assignment	Sent to the Responsibility role when the issue is past due.
Issues	Issue Requires Verification	Please verify issue {IssueNumber_f} and move it to closed state or reopen it if required.	Assignment	Sent to the Verified By role when the state is Verification.
Issues	Issue Reopened	Please review issue {IssueNumber_f} and address the reason it was reopened.	Assignment	Sent to the Responsibility role when the state becomes Reopened.

Process	Title	Message	Action Type	Sent To / Sent When
Issues	Issue in Progress	An issue with the following details has been assigned to you, please complete the issue: Summary: {Summary_f} DueDate: {DueDate_f} Priority: {Priority_f}	Assignment	Sent to the Responsibility role when the state becomes In Progress.
Issues	Issue on Hold	An issue with the following details Is on hold, please complete the issue: Summary: {Summary_f} DueDate: {DueDate_f} Priority: {Priority_f}	Assignment	Sent to the Responsibility role when the state becomes On Hold.
Issues	Issue Past Due – Escalation	Issue {IssueNumber_f} is past due by 7 days - Please contact "Responsibility" to address the reason for delay.	Assignment	Sent to the "Reports To" user of the Responsibility role when the issue is NOT in the Closed, Verification, or Reopened state and is 7 days past the due date.
Lessons Learned	Owner – Requires Review	The following lesson learned requires review, please review this time and then either set the state back to active if it still applies or to obsolete if it no longer applies: Title: {Title_f}	Assignment	Sent to the Owner when the state becomes Review Required.
Projects	Project Assigned	Project Name: {ProjectName_f} Project Number: {ProjectNumber_f}	Notification	Sent to the Project Manager when the Project Manager has changed or been assigned.

Process	Title	Message	Action Type	Sent To / Sent When
Projects	Project Manager – Project Implementation Rejected	Project Name: {ProjectName_f} Project Number: {ProjectNumber_f}	Assignment	Sent to the Project Manager role when the approval process is rejected.
Projects	Project Implementation – Approval Complete	Project Name: {ProjectName_f} Project Number: {ProjectNumber_f}	Assignment	Sent to the Project Manager role when the approval is completed successfully.
Projects	Stakeholder Approvers – Project Implementation Rejected	Project Name: {ProjectName_f} Project Number: {ProjectNumber_f}	Assignment	Sent to the Stakeholder Approvers when the project implementation is rejected.
Projects	Project Closure – Approval Complete	Project Name: {ProjectName_f} Project Number: {ProjectNumber_f}	Assignment	Sent to the Project Manager role when the project is closed.
Projects	Project Past Due	Project {ProjectNumber_f} is past due - Please address this issue. This project will be escalated to your supervisor in 7 days if action is not taken to close the project	Assignment	Sent to the Project Manager role when the current state is Project Planning and Scheduling and the current date is past the project target completion date.

Process	**Title**	**Message**	**Action Type**	**Sent To / Sent When**
Projects	Project Past Due - Escalation	Project {ProjectNumber_f} is past due - Please address with the project manager Project Manager: {Responsibility_f}	Assignment	Sent to the person to whom the Project Manager reports to when the current date is seven days past the project target completion date.
Projects	Project Closure Approval	Project Name: {ProjectName_f} Project Number: {ProjectNumber_f}	Approval	Approvers are notified that they have open approval items.
Projects	Project Planning and Scheduling Approval	Project Name: {ProjectName_f} Project Number: {ProjectNumber_f}	Approval	Approvers are notified that they must approve or reject the project plan and scheduling.
Project Tasks	Approaching Deadline Date	Projects Task for the following information is due in 5 days: Project: {CRbacktoNewProductDevelopme_f} Task: {Task_f} Deadline Date: {DueDate_f} Requirement(s): {Requirements_f}	Assignment	Sent to the Responsibility role when the current date is within five or fewer days before the due date.
Project Tasks	Responsibility – Assigned Task	You have been assigned the following project task, please finish the task and then mark it complete: Project: {CRbacktoNewProductDevelopme_f} Task: {Task_f} Deadline Date: {DueDate_f} Requirement(s): {Requirements_f}	Assignment	Sent to the Responsibility role when they are assigned a task.

Process	Title	Message	Action Type	Sent To / Sent When
Project Tasks	Approval Rejected	Project: {CRbacktoNewProductDevelopme_f} Deadline Date: {DueDate_f}	Assignment	Sent to the Responsibility role when the approval is rejected.
Project Tasks	Approval Rejected – Supplier	Project: {CRbacktoNewProductDevelopme_f} Deadline Date: {DueDate_f}	Assignment	Sent to the Supplier Contact when the approval is rejected.
Project Tasks	Approval Complete	Project: {CRbacktoNewProductDevelopme_f} Deadline Date: {DueDate_f}	Assignment	Sent to the Responsibility role when the approval is completed successfully.
Project Tasks	Approval Complete – Supplier	Project: {CRbacktoNewProductDevelopme_f} Deadline Date: {DueDate_f}	Assignment	Sent to the Supplier Contact when the approval is completed successfully.
Project Tasks	Supplier – Assigned Task	You have been assigned as the supplier for the following Project task, please complete the task and then move it to complete: Project: {CRbacktoNewProductDevelopme_f} Task: {Task_f} Deadline Date: {DueDate_f} Requirement(s): {Requirements_f}	Assignment	Sent to the Supplier Contact when a project task is assigned to them.
Project Tasks	Project Task Past Due	Project task {Task_f} is past due Due Date: {EndDate_f} Calculated Finish Date: {CalculatedFinishDate_f} Please take action to close this task	Assignment	Sent to the Responsibility when the current date is past the deadline date.

Process	**Title**	**Message**	**Action Type**	**Sent To / Sent When**
Project Tasks	Project Task Past Due - Escalation	Project task {Task_f} is 7 Days past due - Please address with : {Responsibility_f} Due Date: {EndDate_f} Calculated Finish Date: {CalculatedFinishDate_f}	Assignment	Sent to the person to whom the Responsibility reports when the current date is seven days past the deadline date.
Project Tasks	Ready for Approval	Project: {CRbacktoNewProductDevelopme_f} Responsibility: {Responsibility_f} Deadline Date: {DueDate_f}	Approval	Notify approvers that the task is ready for approval.

Chapter 5

Metrics and Reports

Introduction to Metrics and Reports

The QMS system includes reporting and metric features that let you analyze the data in each process, measuring efficiency and effectiveness. The metrics and reports available differ between each process.

Reports are generated within each process, either from the search screen or the detail screen. Metrics and key process indicators (KPIs) are gadgets that can be placed on one of your dashboards.

See the User Interface user guide to learn how to access reports, metrics, and KPIs.

Reports

Pre-set reports have been set up to be pulled on a process by process basis, though not every process has a pre-set report. Certain reports require additional parameters in order to be previewed. The parameters are listed on the right side of the preview window. If a report requires parameters, then this pane will automatically appear. Once you have selected the desired parameters, click the Preview button to see the report preview.

Below is a table that describes each report available in the Continuous Improvement module. In addition to title and description, the table indicates which process each report comes from and whether it is pulled from the search screen or detail screen. Lastly, if the report requires specific parameters in order to be generated properly, a description of those parameters is included below that report. See the User Interface user guide to learn how to access reports.

Process	**Pulls From**	**Title**	**Description**
Workflow Roles	Detail Screen	Audit Trail – Workflow Roles	Provides a path of how the record has progressed over time (who, what, and when).
Meeting Types	Detail Screen	Audit Trail – Meeting Types	Provides a path of how the record has progressed over time (who, what, and when).
Issue On Hold Reasons	Detail Screen	Audit Trail – Issue On Hold Reasons	Provides a path of how the record has progressed over time (who, what, and when).
Issue Resolutions	Detail Screen	Audit Trail – Issue Resolutions	Provides a path of how the record has progressed over time (who, what, and when).
Issue Categories	Detail Screen	Audit Trail – Issue Categories	Provides a path of how the record has progressed over time (who, what, and when).
Project Types	Detail Screen	Audit Trail – Project Types	Provides a path of how the record has progressed over time (who, what, and when).
Project Gates Library	Detail Screen	Audit Trail – Project Gates Library	Provides a path of how the record has progressed over time (who, what, and when).
Project Tasks Library	Detail Screen	Audit Trail – Project Tasks Library	Provides a path of how the record has progressed over time (who, what, and when).
Project Roles Library	Detail Screen	Audit Trail – Project Roles Library	Provides a path of how the record has progressed over time (who, what, and when).

Process	Pulls From	Title	Description
Improvements Impacts	Detail Screen	Audit Trail – Improvements Impacts	Provides a path of how the record has progressed over time (who, what, and when).
Improvements Categories	Detail Screen	Audit Trail – Improvements Categories	Provides a path of how the record has progressed over time (who, what, and when).
Meetings	Detail Screen	Audit Trail – Meetings	Provides a path of how the record has progressed over time (who, what, and when).
Meetings	Detail Screen	Meeting Detail Report	Summary report of the meeting. Includes distribution and attendees, agenda, and notes issues list.
Issues	Detail Screen	Audit Trail – Issues	Provides a path of how the record has progressed over time (who, what, and when).
Projects	Detail Screen	Audit Trail – Projects	Provides a path of how the record has progressed over time (who, what, and when).
Projects	Detail Screen	Project Issues Report	List off issues and status of the issues linked to the project.
Projects	Detail Screen	Project Status Report	Presents a summary of the project and gate status.
Projects Tasks	Detail Screen	Audit Trail – New Product Development Tasks	Provides a path of how the record has progressed over time (who, what, and when).
Projects Tasks	Detail Screen	AIAG Feasibility Checklist	Supplies a summary of the checklist information related to the task.
Improvements	Detail Screen	Audit Trail – Improvements	Provides a path of how the record has progressed over time (who, what, and when).
Lessons Learned	Detail Screen	Audit Trail – Lessons Learned	Provides a path of how the record has progressed over time (who, what, and when).

Metrics

Below is a table that describes each metric available in the Continuous Improvement module. In addition to title and description, the table indicates which process each metric comes from. Lastly, if the metric requires specific parameters in order to be generated properly, a description of those parameters is included below that metric. See the User Interface user guide to learn more about metrics.

Process	Pulls From	Title	Description
Projects	Gadgets	Quality NPI (New Product Introduction)	Indicates the average time between the creation of the project and the creation of a manufacturing document linked to the project.
Projects	Gadgets	Open Projects by Site Grouped by Critical Project Status	Shows the total number of open projects for a site, grouped by critical project status.

Projects	Gadgets	Open Projects by Site	Shows the total number of open projects for a site.
Project Tasks	Gadgets	Number of Project Past Due Tasks by Site	Indicates the number of tasks that are past the finish date and not in the Complete state, grouped by site.
Project Tasks	Gadgets	Number of Project Past Due Tasks for a Program	Indicates the number of tasks that are past the finish date and not in the Complete state, grouped by program.
Improvements	Gadgets	Number of Improvements by Site in the Past 365 Days	Indicates the number of improvements created in the past year, grouped by site.

KPIs

See the User Interface user guide to learn more about KPIs.

There are no KPIs defined for this module.

Chapter 6

Security Settings

Security Roles

Security roles define how various users access and control different types of processes and data. These roles are then assigned to each user. Some roles are used by many users, while others may only be applied to one or two individuals.

The following security roles apply in the Continuous Improvement module.

CAPA & NCR Champion

This security role allows you to add records in any process in the CAPA & NCR module.

Connect Maintenance

This security role allows you to add and remove company types. Besides being able to add and remove items for those processes, you can also view and edit all of the fields of the processes noted. Typically this maintenance account is only given to one or two individuals responsible for setting up this data for others to use.

Continuous Improvement Administrator

This security role allows you to add, edit, and remove records in any process in the Continuous Improvement module.

Continuous Improvement Maintenance

This security role allows you to add and edit records in the processes required to set up the Continuous Improvement module.

Document Maintenance

This security role allows you to add and remove document types, drawing types, document templates, and record types, as well as add review frequencies. Besides being able to add and remove items for those processes, you can also view and edit all of the fields of the processes noted. Typically this maintenance account is only given to one or two individuals responsible for setting up this data for others to use.

Documents Administrator

This security role allows you to add, edit, and remove records in any process in the Document Control module.

Documents Champion

This security role allows you to add records in any process in the Document Control module.

Drawing Add/Edit

This security role allows you to add and edit new Drawings and Specifications. Upon adding a drawing, you become the drawing owner by default. The drawing owner and the Drawing Administrator security role are the only users who can edit the drawing.

Drawing Administrator

This security role allows you to add new drawings and drawing features. The drawing administrator also has the ability to edit any drawing as if he or she were the owner of the drawing owner

Meetings Add/Edit

This security role allows you to add and edit meetings.

Projects Add/Edit

This security role allows you to add and edit the following data based on work flow security rules: projects, projects tasks, projects gates, new project development project roles, and projects phases and issues.

Projects Maintenance

This security role allows you to add, edit, and remove the following data: projects, projects tasks, projects gates, projects phases, project roles, projects library tasks, issue categories, meeting types, project types, project types gates, project roles, and projects task groups.

System Administrator

This maintenance security role allows you to add and remove security roles, domains, entities, sites, locations, generalized code types and codes, product lines, item groups, item types, review frequencies, company types, cost accounts, and units of measure. Besides being able to add and remove items, you can also view and edit all of the fields for the processes noted. Typically this maintenance security role is only given to one or two individuals who are responsible for setting up the data for others to use.

System View

System view is a generic role that most users and modules use. This role allows you to view (but in most cases not edit) much of the non-sensitive data in the system. being able to view the data is still subject to you having the ability to navigate to, and open, a process.

Every user should have this security role because it allows users to view non-secure data for most processes. For users who typically only have to approve data, but do not have to add or edit data, this System View role is what they need.

Process Security Roles

Each list below displays the security roles that provide you with permissions to add items for the indicated individual process.

Workflow Roles

- Continuous Improvement Administrator
- Continuous Improvement Maintenance

Meeting Types

- APQP Administrator
- APQP Champion
- APQP Maintenance
- Continuous Improvement Administrator
- Continuous Improvement Maintenance

Issue On Hold Reasons

- APQP Administrator
- APQP Champion
- APQP Maintenance
- APQP Projects Add/Edit
- Continuous Improvement Administrator
- Continuous Improvement Maintenance

Issue Resolutions

- APQP Administrator
- APQP Champion
- APQP Library Maintenance
- APQP Maintenance
- APQP Projects Add/Edit
- APQP Projects Maintenance
- Continuous Improvement Administrator
- Continuous Improvement Maintenance
- System Administrator

Issue Categories

- APQP Administrator
- APQP Champion
- APQP Maintenance
- APQP Projects Maintenance
- Continuous Improvement Administrator
- Continuous Improvement Maintenance
- System Administrator

Project Phases Library

- APQP Administrator
- APQP Champion
- APQP Maintenance
- APQP Projects Add/Edit
- APQP Projects Maintenance
- Continuous Improvement Administrator
- Continuous Improvement Maintenance

- Projects Add/Edit
- Projects Maintenance

Project Templates

- APQP Administrator
- APQP Champion
- APQP Maintenance
- APQP Projects Maintenance
- Continuous Improvement Administrator
- Continuous Improvement Maintenance
- Projects Maintenance

Project Tasks Library

- APQP Administrator
- APQP Champion
- APQP Projects Maintenance
- Continuous Improvement Administrator
- Continuous Improvement Maintenance
- Projects Maintenance

Project Roles Library

- APQP Administrator
- APQP Champion
- APQP Maintenance
- APQP Projects Maintenance
- Continuous Improvement Administrator
- Design Engineer
- Manufacturing Documents Add/Edit
- Manufacturing Documents Maintenance
- Projects Maintenance

Improvement Impacts

- CAPA & NCR Administrator
- CAPA & NCR Champion
- Continuous Improvement Administrator
- Continuous Improvement Maintenance

Improvements Categories

- CAPA & NCR Administrator
- CAPA & NCR Champion
- Continuous Improvement Administrator
- Continuous Improvement Maintenance

Meetings

- APQP Administrator
- APQP Champion
- Meetings Add/Edit

Issues

- APQP Administrator
- APQP Champion
- APQP Library Maintenance
- APQP Maintenance
- Continuous Improvement Administrator
- Continuous Improvement Maintenance
- Meetings Add/Edit
- Projects Add/Edit
- Projects Maintenance

Projects

- APQP Administrator
- APQP Champion
- APQP Projects Add/Edit
- Continuous Improvement Administrator
- Projects Add/Edit
- Projects Maintenance

Projects Tasks

- APQP Administrator
- APQP Champion
- APQP Projects Add/Edit
- Continuous Improvement Administrator
- Projects Add/Edit
- Projects Maintenance

Improvements

- CAPA & NCR Administrator
- CAPA & NCR Champion
- Continuous Improvement Administrator
- Continuous Improvement Maintenance

Lessons Learned

- APQP Administrator
- CAPA & NCR Administrator
- CAPA & NCR Champion
- Continuous Improvement Administrator

- Continuous Improvement Maintenance
- Investigations Add/Edit
- Projects Maintenance

State Change Security

As you complete tasks in the system, changes occur based on your activities (such as changing a record's state) and when other events occur (such as a specific amount of time passing). The changes based on your activities are called **actions**, while the event-based changes are called **transactions**. The main difference between the two is the initiator: actions are performed by users, and transactions are managed by the system.

Each system change may depend on a number of factors, including where you are in the system, who is involved, which fields are populated, and more. It is important to know the actions and transactions for each process because these affect your ability to complete a task.

The state change security for each process is separated into two sections:

1. **Security.** Which users (by security role or field role) can change the state of a record. Field roles are indicated with an asterisk*.
2. **Transactions.** The conditions that must be met to initiate a transactions.

Security

Meeting Types

Transitions	APQP Administrator	APQP Maintenance	Continuous Improvement Administrator	Continuous Improvement Maintenance
Active >> Inactive	✓	✓	✓	✓
Inactive >> Active	✓	✓	✓	✓

Issue On Hold Reasons

Transitions	APQP Administrator	APQP Champion	APQP Projects Add/Edit	Continuous Improvement Administrator	Continuous Improvement Maintenance
Active >> Inactive	✓	✓	✓	✓	✓
Inactive >> Active	✓	X	✓	✓	✓

Issue Resolutions

Transitions	APQP Administrator	APQP Champion	Continuous Improvement Administrator	Continuous Improvement Maintenance
Active >> Inactive	✓	✓	✓	✓
Inactive >> Active	✓	X	✓	✓

Issue Categories

Transitions	APQP Administrator	APQP Maintenance
Active >> Inactive	✓	✓
Inactive >> Active	✓	✓

Project Phases Library

Transitions	APQP Administrator	APQP Champion	APQP Maintenance	Continuous Improvement Administrator	Continuous Improvement Maintenance	Projects Add/Edit	Projects Maintenance
Active >> Inactive	✓	✓	✓	✓	✓	✓	✓
Inactive >> Active	✓	✓	✓	✓	✓	✓	✓

Project Templates

Transitions	APQP Administrator	APQP Projects Maintenance	Continuous Improvement Administrator	Continuous Improvement Maintenance	Projects Maintenance
Active >> Inactive	✓	✓	✓	✓	✓
Inactive >> Active	✓	✓	✓	✓	✓

Project Tasks Library

Transitions	APQP Administrator	Continuous Improvement Administrator	Continuous Improvement Maintenance
Default >> Ready to Approve	✓	✓	✓

Transitions	APQP Administrator	Continuous Improvement Administrator	Continuous Improvement Maintenance
Ready to Approve >> Approved	✓	✓	✓
Ready to Approve >> Rejected	✓	✓	✓

Project Roles Library

Transitions	APQP Administrator	Design Engineer
Active >> Inactive	✓	✓
Inactive >> Active	✓	✓

Improvement Impacts

Transitions	CAPA & NCR Administrator	CAPA & NCR Champion	Continuous Improvement Administrator	Continuous Improvement Maintenance
Active >> Inactive	✓	✓	✓	✓
Inactive >> Active	✓	X	✓	X

Improvements Categories

Transitions	CAPA & NCR Administrator	CAPA & NCR Champion	Continuous Improvement Administrator	Continuous Improvement Maintenance
Active >> Inactive	✓	✓	✓	✓
Inactive >> Active	✓	✓	✓	✓

Issues

Transitions	Responsibility*	Verified By*	APQP Administrator	Continuous Improvement Administrator	Continuous Improvement Maintenance	Meetings Add/Edit	Projects Add/Edit	Projects Maintenance
Assigned >> In Progress	✓	X	✓	✓	✓	✓	✓	✓
Closed >> Re-Opened	✓	X	✓	✓	✓	✓	✓	✓
In Progress >> Complete	✓	X	✓	✓	✓	✓	✓	✓
In Progress >> On Hold	✓	X	✓	✓	✓	✓	✓	✓
New >> Assigned	✓	X	✓	✓	✓	✓	✓	✓
On Hold >> In Progress	✓	X	✓	✓	✓	✓	✓	✓
On Hold >> Re-Opened	✓	X	✓	✓	✓	✓	✓	✓
Re-Opened >> Complete	✓	X	✓	✓	✓	✓	✓	✓
Re-Opened >> On Hold	✓	X	✓	✓	✓	✓	✓	✓
Verification >> Closed	X	✓	X	✓	✓	X	X	✓

Projects

Transitions	Project Manager*	APQP Administrator	APQP Champion	Continuous Improvement Administrator
Project Implementation Rejected >> Project Implementation	✓	✓	✓	✓
Project Planning and Scheduling >> Project Planning and Scheduling Approval	✓	✓	X	✓
Project Planning Rejected >> Project Planning and Scheduling	✓	✓	✓	✓
Project Review >> Project Closure	✓	✓	✓	✓

Projects Tasks

Transitions	Responsibility*	APQP Administrator	Continuous Improvement Administration	External Supplier	Projects Add/Edit	Projects Maintenance
Approval Rejected >> Assigned	✓	✓	✓	✓	✓	✓
Assigned >> Complete	✓	✓	✓	✓	✓	✓
Assigned >> On Hold	✓	✓	✓	✓	✓	✓
New >> Assigned	✓	✓	✓	✓	✓	✓
On Hold >> Assigned	✓	✓	✓	✓	✓	✓
On Hold >> Complete	✓	✓	✓	✓	✓	✓
Ready for Approval >> Assigned	X	X	X	X	X	X

Improvements

Transitions	CAPA & NCR Administrator	CAPA & NCR Champion	*Champion	Continuous Improvement Administrator	Continuous Improvement Maintenance
Denied >> Planned	✓	X	X	✓	X
Draft >> Submit	✓	✓	✓	✓	✓
In Process >> Ready for Closure	✓	✓	✓	✓	✓
Planned >> Ready for Closure	✓	✓	✓	✓	✓
Planned >> In Process	✓	✓	✓	✓	✓
Submit >> Denied	✓	X	X	✓	X
Submit >> Planned	✓	✓	✓	✓	✓
Ready for Closure >> Complete	✓	✓	✓	✓	✓

Lessons Learned

Transitions	APQP Administrator	CAPA & NCR Administrator	CAPA & NCR Champion	*Owner	Projects Maintenance	Supply Chain Manager	Supplier Quality Champion
Active >> Obsolete	✓	✓	X	X	✓	X	✓

Transitions	APQP Administrator	CAPA & NCR Administrator	CAPA & NCR Champion	*Owner	Projects Maintenance	Supply Chain Manager	Supplier Quality Champion
Draft >> Active	✓	✓	✓	✓	✓	✓	✓
Obsolete >> Review Required	✓	✓	X	X	✓	X	X
Review Required >> Active	✓	✓	X	✓	✓	✓	✓
Review Required >> Obsolete	✓	✓	X	X	✓	X	X

Transactions

Project Templates

PPAP Required is Null or False

When the PPAP Required field is null or set to False, the PPAP Requirement Set field is hidden.

Project Template In Use

When the Due Date Calculation In Use field is not null, the Due Date Calculation field is hidden.

Project Template Not In Use

The Due Date Calculation In Use field is hidden when null.

Project Phases Library

PPAP Required is Null

The PPAP Required and PPAP Requirement Set(s) fields are hidden when the PPAP Required field is empty.

Project Templates Changes

When the Project Template field changes, the PPAP Required field is updated.

Project Tasks Library

Doesn't Require PPAP or Submission Levels are not Populated

The PPAP Requirement Sets field is hidden when one of the following is true:

- The associated phase does not have any project templates associated with it whose project template's PPAP Required check box is selected to be True
- The PPAP Requirement Sets field is not populated

Doesn't Require PPAP or Submission Levels are Populated

The PPAP Save Warning field is hidden when one of the following is true:

- The associated phase does not have any project templates associated with it whose project template's PPAP Required check box is selected to be True
- The PPAP Requirement Sets field is populated

Requires File

When the Requires File field is False, the PPAP Requirement field is hidden.

Meetings

Complete Date Not Null

If the Complete Date is not null, then the system inserts participant attendance based on the Employee Participants and Customer Participant fields. Additionally, the system updates the meeting to Complete or Complete – Private.

First Save

When the meeting is saved for the first time, the record is updated to initiate a proper save on checklist items.

Issues

Category Selected

When the Category field is selected, the Workflow Roles field is populated based on the selected category's Workflow Libraries' roles.

If Status Field is Empty

The Status field is hidden when empty.

Need to Set Verification Date

The system sets the verification date to the current date when the following requirements are met:

- The "Verification Required" toggle is set to YES
- The state moves to Closed
- The Verification Date field is empty

No Issue Category or No Workflow Category in Issue Category

When the record does not contain an issue category, or when the issue category does not contain a workflow category, the field Workflow Category is hidden.

No Workflow

When the record does not contain a workflow, the following fields are hidden:

- All Workflow Complete
- All Task Responsibilities Assigned
- Workflow
- Workflow Roles

State – Assigned

When the process is moved to the Assigned state, the responsible user is notified that the process has been assigned.

State – Complete

When the process is moved to the Complete state:

- If the "Verification Required" toggle is set to YES, the system moves the state to Verification.
- If the "Verification Required" toggle is set to NO, the system moves the state to Closed.

State – In Progress

When the process is moved to the In Progress state, the responsible user is notified that the process is In Progress.

State – On Hold

When the process is moved to the On Hold state, the responsible user is notified that the process is On Hold.

State – Reopened

When the process is moved to the Reopened state, the responsible user is notified that the process has been reopened.

State – Verification

When the process is moved to the Verification state, the user assigned as Verified By is notified that the issue requires verification.

State Change – Assigned

When the current state changes to Assigned, the first workflow is updated to the Assigned state. Additionally, the Issue Workflow Roles records are updated to the Assigned state, unless the Employee field is null.

State Change – In Progress

When the current state changes to In Progress, the associated workflows are updated.

State Not Closed and 7 Days Past Due

A notification is sent to the responsible user when the record is seven days past the due date and the current state is not Closed, Verification, or Reopened.

State Not Closed and Past Due

When the current state is not Closed and the current date is beyond the due date, a notification is sent to the responsible user that the record is past due.

Verification Not Required

When the Verification Required field is set to false or null, the Verifier field is hidden.

Verification Not Required or State Not Verification or Closed

When the "Verification Required" toggle field is set to NO or UNDECIDED, the following fields are hidden:

- Verification Date
- Verification Notes
- Verified By

Verified By is Empty and State Isn't Verification

The Verified By field is hidden when it is empty and the current state is NOT Verification.

Projects

Complete

When the current state is Complete, a notification is sent to the Project Manager to inform them that the project has been closed.

Critical Project Status is Green

When the current Critical Project Status value is Green, the Critical Project Status field back-color is set to green.

Critical Project Status is Red

When the current Critical Project Status value is Red, the Critical Project Status field back-color is set to red.

Critical Project Status is Yellow

When the current Critical Project Status value is Yellow, the Critical Project Status field back-color is set to yellow.

Current State Changes to Project Planning and Scheduling Approval State and Project Template is not in Use

When the current state changes to Project Planning and Scheduling Approval and the Due Date Calculation In Use field is null, the selected project template is updated to In Use.

First Save

When the process is saved for the first time, the system performs the following tasks:

- Project Phases are added to the project based on the Project Template.
- Project Roles are added from the Project Tasks – Stored Procedure.
- A risk associated with the project is created for each record in the Risk Library linked to a risk driver that is ultimately linked to the system driver Projects. The system should insert a record if it is not found based on the key match of Title.

First Save – Finish Type

The Calculated Project Finish Date field is updated when the following rules are true:

- The Due Date Calculation field is true
- The current state is saved to either Project Planning and Scheduling **OR** Project Planning and Scheduling Approval

Hide Calculated Finish Date

When the due date calculation from the project template is START and the calculated project finish date is null, the Calculated Project Finish Date field is hidden.

Hide Calculated Start Date

When the due date calculation from the project template is FINISH and the project start date is null, the Calculated Project Start Date field is hidden.

Hide the Category field if it is empty

The Category field is hidden when empty.

Hide the Status field if it is empty

The Status field is hidden when empty.

Need to Create PPAP Submission

A PPAP Submission record is created and the Submission Status checklist is populated with the PPAP requirements of the associated project tasks when the following conditions are met:

- The project template requires PPAP approval
- There are no PPAP submissions for the project
- The Manufacturing Document, Item (from ERP), and Customer fields contain values

New Project Template Assigned

When the project template is changed from null to not null, the system:

- Adds project phases to project based on the project template.
- Adds project roles from project tasks – Stored Procedure.
- Updates the task, phase, and project color statuses across the entire project.
- Inserts task dependency records based on the library.
- Sets task dates based on dependency records.
- Sets the project start date to the earliest phase start date when the due date calculation from the project template is set to Finish.
- Sets the project target completion date to the latest phase finish date when the due date calculation from the project template is set to Start.

PPAP Submission Exists

When the PPAP Submissions field contains one or more records, the related PPAP Submissions records are updated when the Project record is saved.

Project 7 Days Past Due

When the project's current state is Complete and the current date is seven days past the project target completion date, a notification is sent to the person that the Project Manager reports to, informing them that the project is past due.

Project Color Status is Green

When the current Project Color Status value is Green, the field's back-color is set to green.

Project Color Status is Red

When the current Project Color Status value is Red, the field's back-color is set to red.

Project Color Status is Yellow

When the current Project Color Status value is Yellow, the field's back-color is set to yellow.

Project Implementation

Upon each save when the project is in the state Project Implementation, the following items occur:

- A notification is sent to the employee responsible for the process, which informs them that the approval has completed successfully.
- Linked phases are updated from the state New to the state Scheduled.
- Linked tasks are updated from the state New to the state Assigned.
- If all the phases are closed and the current state is still Project Implementation, the system updates the state to Project Review.

Project Implementation Rejected

When the process is in the state Project Implementation Rejected, a notification is sent to the responsibility and to the stakeholder approvers to inform them about the rejection.

Project Manager Has Changed or Been Assigned

When the project manager is assigned for the first time or is changed and the current state is either Project Implementation or Project Planning and Scheduling, a notification is sent to the project manager to inform them that the project has been assigned.

Project Past Due

When the current date is past the project target completion date and the current state is not Complete or Project Planning and Scheduling, a notification is sent to the Project Manager to inform them that the project is past due.

Project Start Date Incorrect

The system sets the Project Start Date to the earliest phase start date when the due date calculation from the project template is set to finish

OR

The system sets the Project Target Completion Date to the latest phase finish date when the due date calculation from the project template is set to start.

This transaction is triggered when the following rules are true:

- The project template's Due Date Calculation is set to Finish
- At least one start date is recorded at the phase level

- The end user changes the Start Date value so it does not match the minimum Start Date from the phases

OR

- The Project Start Date is null

Project Start/Finish Date Updated

When the project start date or finish date is changed from a non-null value, the following items occur:

- The system updates the start date and deadline date on the project tasks; this does not affect calculated and supported dependencies.
- The Start Date Change field is updated with the old project start date. Results are used to modify project task starting dates.
- The End Date Change field is updated with the old project end date. Results are used to modify project task finish dates.

Run Nightly

When the current state is not complete, the system will update the color status of each task, phase, and project status field, and record the date and time that this occurred.

Projects Tasks

All Dependency Records were Removed

When all Dependency records were unlinked from this project task, the "Dependency Calculated Phases" check box is deselected on the current task.

Approaching Deadline Date

When the current date is within five or fewer days before the due date, the user in the Responsibility field receives a notification that the due date is approaching.

Approval Complete

When the process state is Approved, the responsible employee is notified that the approval process has completed successfully.

Approval Complete – Supplier

When the process state is Approved, the supplier contact is notified that the approval process has completed successfully.

Approval Rejected

When the process state is Rejected, the responsible employee is notified that the approval has been rejected.

Approval Rejected – Supplier

When the process state is Rejected, the supplier contact is notified that the approval has been rejected.

Assigned

When the current state is Assigned, a notification is sent to the Responsibility and the Supplier to inform them that the task is assigned.

Auto-Approve

When the current state is Ready for Approval and the "Requires Approval" check box is not selected, the system updates the current state to Approved.

Changed Supplier or Supplier Contact

When either the Supplier or the Supplier Contact fields are changed, the new responsible user is notified that they have been assigned a task.

Closed

When the current state changes to Closed, the task file is copied to the associated PPAP requirement's project task file and the "Requirement Met" check box is selected.

Additionally, the linked phase is updated to Ready for Approval if all the tasks linked to that phase are complete or closed.

Closed, or Complete and not Requires Approval

When the current state changes to Complete and the Requires Approval check box is **not** selected OR the current state changes to Closed, the following changes occur:

- The system copies the task file to the associated PPAP Requirement's project task file, and flags the "Requirement Met" check box to True
- The project is re-saved

Complete not Requires Approval

When the current state is Complete and the "Requires Approval" check box is **not** selected, the current state is updated to Closed.

Additionally, the task color indicator, phase color and dates, and the project color indicator are set based on the current task.

Complete Requires Approval

When the current state is Complete and the "Requires Approval" check box is selected, the current state is updated to Ready for Approval. Level approvers are linked based on the level approvers selected in the Library Tasks process.

Additionally, the task color indicator, phase color and dates, and the project color indicator are set based on the current task.

Criticality has Changed

When the criticality has changed, the task color indicator, phase color and dates, and the project color indicator are set based on the current task.

Dependency Calculated Dates is NULL

When the current Tasks Dependency Calculated Dates field is not selected, the Dependency Calculated Dates field is hidden.

Note that this field should only be deselected when the current task has no linked dependencies.

Dependency Calculated Dates is Set to Calculated

When the current Tasks Dependency Calculated Dates value is selected, the following fields are hidden:

- Finish Date
- Start Date

Dependency Calculated Dates is Set to Supported or NULL

When the current Tasks Dependency Calculated Dates value is set to Supported or is NULL, the following fields are hidden:

- Calculated Finish Date
- Calculated Start Date

Dependency Record Removed

When a dependency is unlinked or removed from the current task, the Start and Finish Date values are updated for the current projects task and any of its successor tasks based on the dependency records.

When the Dependency Calculated Dates field is set to "Support", the Start and Finish Date values for that task will only be adjusted if they are set before the earliest acceptable dates based on the existing dependencies.

Additionally, the Start and Finish Date values on the linked phase are updated to match the Start and Finish Dates on the current task. This only happens when the current tasks Start or Finish Date value is the earliest or latest in the phase, respectively.

Does Not Require Customer Approval

If the associated library task requires customer approval, then the Proof of Customer Approval field is visible. If customer approval is not required, then this field is hidden.

Finish Date has Changed

When the Finish Date value has changed, the following items occur:

- The Duration field of the current task is updated based on the Start and Finish Date values.
- The Start and Finish Date values are updated on the current projects task and any of its successor tasks based on the dependency records.
  - When the Dependency Calculated Dates field is set to "Support", the Start and Finish Date values for that task will only be adjusted if they are set before the earliest acceptable dates based on the existing dependencies.
- The Start and Finish Date values on the linked phase are updated to match the Start and Finish Dates on the current task. This only happens when the current tasks Start or Finish Date value is the earliest or latest in the phase, respectively.
- The task color indicator, the phase color and dates, and the project color indicator are set based on the current task.

Hide File Field if Not Required

If the Task File field is not required (based on the Require File check box), then the Task File field is hidden.

Hide Status field if it is empty

The Status field is hidden when empty.

Not Required to Approval

When the "Requires Approval" check box is not checked, the Task Approval field is hidden.

Past Due

When the current state is Closed and the current date is past the deadline date, a notification is sent to the Responsibility role to inform them that the project task is past due.

Past Due +7

When the current state is Closed and the current date is seven days past the deadline date, a notification is sent to the person to whom the Responsibility role reports, notifying them that the project task is past due.

PPAP Requirement is Empty

The PPAP Requirement field is hidden when empty.

Start Date is Null, Not Finish and Duration

The Start Date field is populated when the following items are true:

- The Duration field is **not** null
- The Finish Date field is **not** null
- The Start Date field is null
- The Dependency Calculated Dates field is **not** True.

Start Date or Duration has Changed

When the Finish Date value has not changed, and when the Start Date or Duration value has changed and neither of them are NULL, the following items occur:

- The Finish Date value of the current task is updated based on the Start Date and Duration values
- The Start and Finish Date values are updated on the current projects task and any of its successor tasks based on the dependency records.
    - When the Dependency Calculated Dates field is set to "Support", the Start and Finish Date values for that task will only be adjusted if they are set before the earliest acceptable dates based on the existing dependencies.
- The Start and Finish Date values on the linked phase are updated to match the Start and Finish Dates on the current task. This only happens when the current tasks Start or Finish Date value is the earliest or latest in the phase, respectively.
- The Start and Finish Date values on the linked phase are updated to match the Start and Finish Dates on the current task. This only happens when the current tasks Start or Finish Date value is the earliest or latest in the phase, respectively.
- The task color indicator, the phase color and dates, and the project color indicator are set based on the current task.

Supplier Contact has to be Defaulted

When the Supplier Contact is empty or Supplier was changed and the new contact was not selected, the supplier contact is defaulted.

Supplier is Not Selected

When the Supplier is not selected, the Supplier Contact field is hidden.

Supplier is Selected

When the Supplier is selected, the Responsibility field is hidden.

Task Status Background Color is Green

When the current Task Status value is Green, the field's back-color is set to green.

Task Status Background Color is Red

When the current Task Status value is Red, the field's back-color is set to red.

Task Status Background Color is Yellow

When the current Tasks value is Yellow, the field's back-color is set to yellow.

Improvements

First Save

On the initial save of an improvement, the Champion field is defaulted based on the default champion list from the selected category.

ID is 0

When the record's ID is 0, the Champion field is hidden.

Improvement Category – Allow Anonymous

When the Improvement Category's "Allow Anonymous Improvements" check box is not selected, the Log Improvement as Anonymous field is hidden.

Improvement has Reached the Denied State

When the current state is Denied for the first time, the person who submitted the improvement receives a notification that the improvement has been denied.

Improvement has Reached the Submit State

When the current state is Submit for the first time, the Champion receives a notification that the improvement has reached the Submit state.

Improvement Planned

When the current state is Planned, the Champion receives a notification that the improvement is ready to be moved from the Planned state to the In Process state.

Log Improvement as Anonymous is True

When the "Log Improvement as Anonymous" field is selected, the Submitted By field is hidden.

Not Draft and Log Improvement as Anonymous Field is False

When the "Log Improvement as Anonymous" check box is not selected and the state is not set to Draft, the Log Improvement as Anonymous field is hidden.

Not Draft and Log Improvement as Anonymous Field is True

When the "Log Improvement as Anonymous" check box is selected and the state is not set to Draft, the Submitted By field is hidden.

Target Implementation Date has Elapsed

When the current day is one day beyond the Target Implementation Date and the current state is not Complete, the Champion receives a notification that the improvement is beyond the target implementation date.

Lessons Learned

Initiated by CAPA is Empty

The Initiated by CAPA field is hidden when empty.

Initiated by Project is Empty

The Initiated by Project field is hidden when empty.

Initiated by Improvement is Empty

The Initiated by Improvement field is hidden when empty.

Initiated by Incident Investigation is Empty

The Initiated by Incident Investigation field is hidden when empty.

Initiated by Issue is Empty

The Initiated by Issue field is hidden when empty.

Initiated by Nonconformance is Empty

The Initiated by Nonconformance field is hidden when empty.

Initiated by Risk is Empty

The Initiated by Risk field is hidden when empty.

Requires Review

When the current date is equal to or beyond the next review due date, the current state transitions to Review Required.

Review Frequency = None

When the Review Frequency field is empty, the following fields are hidden:

- Last Reviewed
- Next Review Due
- Review Completed By

Review Required State

When the current state is Review Required, a notification is sent to the owner to inform them.

Commands

Some processes utilize command buttons to perform pre-defined actions. Commands can be found under the Actions icon in the top toolbar of the appropriate process.

Below is a table that describes each command available in the Continuous Improvement module. In addition to title and description, the table indicates which process each command comes from, the roles that can execute the command, and the states when the command can be executed.

Process	Title	Description	Used By	State When Used
Project Tasks Library	Get PPAP Submission Levels	Populates the PPAP Requirement Set(s) based on the Project Type PPAP requirement defined in the gate.	APQP Administrator; APQP Champion; APQP Projects Maintenance; Continuous Improvement Administrator; Projects Maintenance	All States
Meetings	Copy Meetings	Copies completed meetings and duplicates the copied information to a new meeting.	APQP Administrator; Meetings Add/Edit	Complete; Complete – Private
Projects	Update Risks from Library	Creates a Risk associated with the Project for each record in the Risk Library linked to a Risk Driver linked to the system driver APQP Projects.	All Roles	Project Planning and Scheduling
Projects	Update Project, Gate, and Task Color Status	Updates the task, gate, and project color statuses across the entire project.	All Roles	All States
Projects	Add New Project Roles from Project Tasks	Allows adding new project roles from project tasks if any tasks in the project were modified by adding roles.	All Roles	Project Review; Project Planning and Scheduling; Project Implementation Rejected

Chapter 7

Module Frequently Asked Questions

Frequently Asked Questions

Why shouldn't I delete items?

Records should only be deleted when you are sure that they are no longer needed. Even though records use a soft delete mechanism, there is still work that must be done to restore an item once it has been deleted.

The best thing to do with an item that is no longer needed is to set it to Inactive, Retired, or Obsolete, whichever state is applicable. This way, the item historically remains in the system but cannot be used.

If you do need to delete an item for good, then use the Trash button in the toolbar. Typically, only the system administrator can delete items.

I just changed the state of a process. What happens now?

When a process' state makes a transition, the system typically takes some automated steps. Details about these steps are listed in the State Change Security section in this user guide.

Typically, state transition steps perform one of three functions:

1. **Notifications.** Notifications are sent to the users that are responsible for the next state of a process.
2. **Field Update.** Fields that depend on a state, date, or action are updated.
3. **Another State Transition**. A process' state may be transitioned automatically by the system, depending on a state, date, or action update.

Some processes may not have any automatic state transitions. In that case, it is useful to check the States section to view the process' state map and read the definitions of each state.

You can also review the Task list for that process. Each list typically describes which state to select when saving a process record.