TEAMCENTER

Quality Actions

Teamcenter 2412

SIEMENS

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Contents

1. About Quality Actions in Teamcenter

Quality actions are used to further break down the responsibilities in quality-related tasks. Quality actions are used to create, execute, and track tasks specific to all quality-control applications.

In Teamcenter, a quality manager can create quality actions to do the following:

- Evaluate the completion of an event using checklists that comprise a list of questions defining the acceptance criteria for a program deliverable.
- Manage the identified prevention, detection, or corrective actions.
- Manage containment actions that must be performed to stop the current problems.

After creating quality actions, the quality manager assigns them to the users responsible for them. These users complete the quality action by providing a comment.

Where do I go from here?

Administrator	To know which features are required to install Quality Action Management, see Install APQP and Quality Action Management.

	For configuring quality actions, see Configure quality actions.
Business User	
How do I create a quality action?	You can create quality actions in a required folder or from the associated checklist of an event. For more information, see **Create a quality action**.
How do I assign a quality action to a user?	Follow the steps in the procedure on **how to assign a quality action to a user**.
How can I receive notifications about the quality actions assigned to me?	Users responsible for completing the actions, or quality managers can receive alerts and notifications for quality actions assigned to them. Read about **the different ways in which you can be notified of your actions**.
How can I track the status of quality actions?	You can **subscribe to quality actions and get notified when they are modified**.

2. Access the tile for your Quality application in the Quality Management workspace

The **Quality Management** workspace is a workspace dedicated to working with Teamcenter Quality applications. The tile in the **Quality Applications** section in the **Quality Management** workspace lets you work with your application.

In the **Quality Management** workspace, you can do the following:

Section	Description
Quality Applications	You can navigate to the Teamcenter Quality applications through the respective tiles. You can directly access the pinned objects and saved searches here.
Favorites	You can use this section to access and work on frequently-used objects that you have added as favorites.
Report Dashboard	You can add relevant template reports in this section to view data that you want review on a regular basis.
Inbox	You can view the tasks assigned to you through workflows in this section.

When you click the tile for a specific application, you can:

- View the dashboard for the application including the quality master data.
- Search for and filter your search results as required.
- Access other applications, such as Assistant, Discussions, Programs, and Schedules, on the global navigation toolbar.

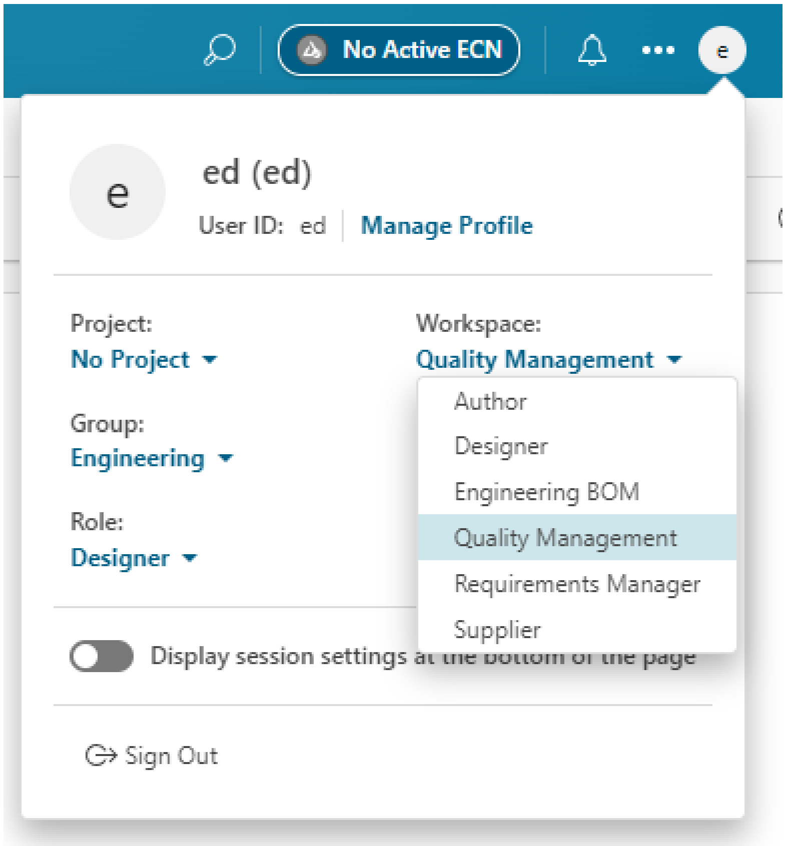
Your administrator must make the **Quality Management** workspace available for your organization's groups and roles.

For more information about workspaces, see *Learn about workspaces* in *Active Workspace Customization* of the Teamcenter documentation.

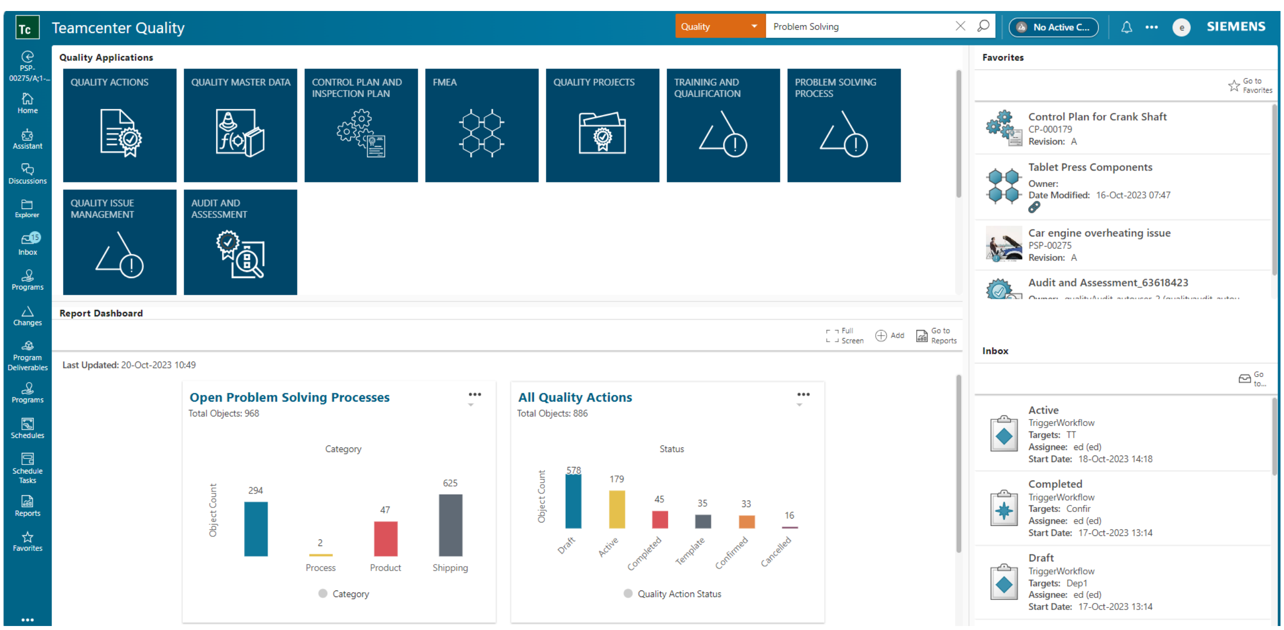
To access the tile for your Quality application in the **Quality Management** workspace:

1. Click your profile icon.
2. From the **Workspace** list, select **Quality Management**.

2. Access the tile for your Quality application in the Quality Management workspace



3. In the **Quality Applications** section, click the tile for the required application.



3. Working with Quality Actions

Create a quality action

Quality actions are used in all Teamcenter Quality applications to create, execute, and track tasks specific to quality control applications.

You can:

- Create a quality action from Folders.
- Create a quality action from the associated checklist of an event or a question.
- Create a quality action template from Quality Master Data.
- Create a quality action from a template.

Create a quality action from Folders

1. On the **HOME** page, click **EXPLORER**, and click **Add to** ⊕ in the **CONTENTS** area.
2. In the **Filter**, type *quality action*, and select **Quality Action**.
3. Specify a name for the quality action.
4. Specify the required properties.
5. From the **Quality Action Status** menu, select a status. By default, it is in **Draft** state.
6. Click **Add**.

Create a quality action from the associated checklist of an event or a question

1. Search for a program in the global search, and click .
2. In **Filters**, from **Type**, select **Program**.
3. Select the required program from the results and click **Open** .
4. In the program timeline, click the required event, and click **Open** and click **Quality** tab.
5. Choose **More Commands** ••• > **New** > **Add Quality Checklist**.
6. Select the required checklist from the list and click **Add**.

7. Select the added checklist and click **Quality** tab.

8. In the **Quality Action** section, click **Add to** ⊕ and select **Add Quality Action**.

   You can also select **Quality Action from Template** or **Quality Action as a Template** as required.

9. Specify a name for the quality action.

10. Specify the required properties.

11. From the **Quality Action Status** list, select a status. By default, it is **Draft**.

12. Select the required **Responsible User**.

    > Note:
    >
    > You must select **Responsible User** in case you want the quality action to show in the **My Activity List** page.

13. Click **Add**.

Create a quality action template from Quality Master Data

1. On the **HOME** page, click **QUALITY MASTER DATA** tile, and click the **Quality Actions** tab.

2. Choose **More Commands** ••• > **New** > **Add Quality Action as a Template** ⊕.

3. In the **Add Quality Action as a Template** panel, specify the required properties.

4. Click **Add**.

Create a quality action from a template

1. Open a program and navigate to the checklist or question.

2. In the **QUALITY ACTION** section, click **Add to** ⊕ and select **Add Quality Action from Template**.

3. In the **Add Quality Action From Template** panel, select the default template quality action, or any other quality action template that you want to use as the reference.

   You can use keywords to search for the required quality action or filter the quality actions that are listed in the panel.

4. From the **Quality Action Status** list, select a status. By default, it is **Draft**.

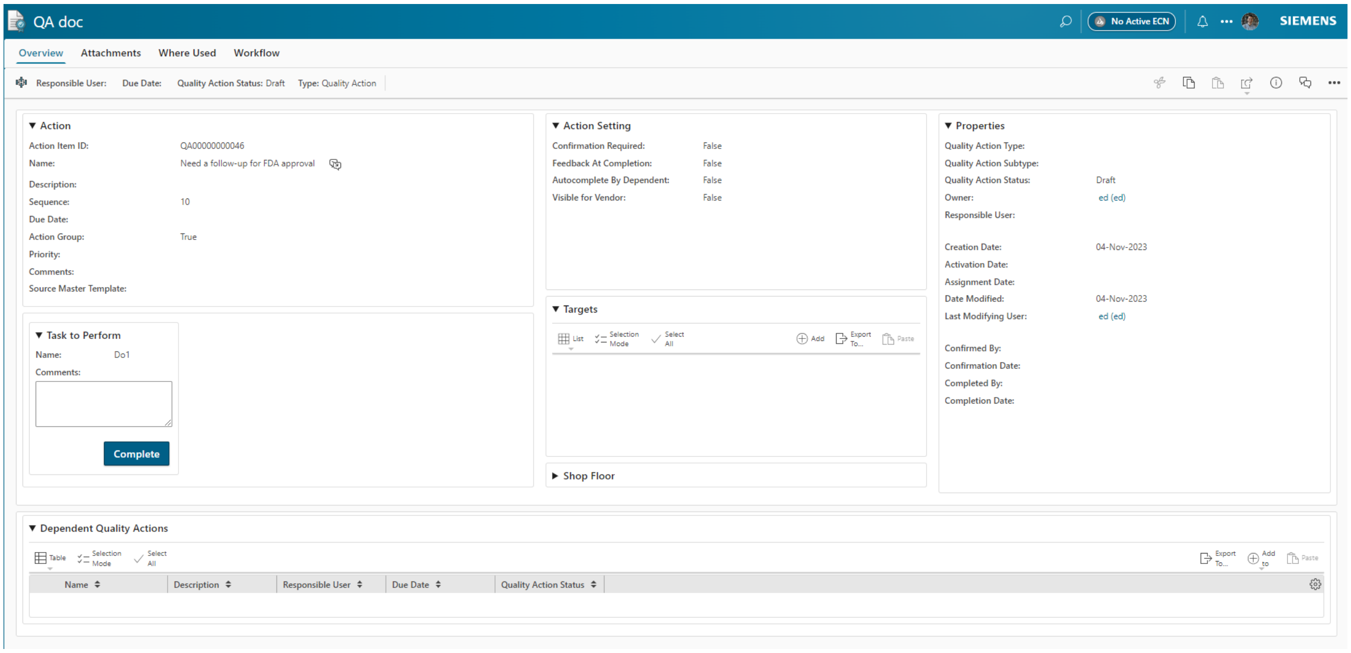
5. Assign a user responsible for the quality action.

> Note:
>
> You must select **Responsible User** in case you want the quality action to show in the **My Activity List** page.

6. Click **Add**.

About properties of quality actions

The **Overview** tab for a quality action object displays the following sections and fields.



Action

Displays the item ID, name, description, and due date of the quality action. You can edit the quality action to do the following:

- Set the **Action Group** value to **True**. This lets you create action groups to segregate or categorize quality actions for different areas.
- Specify the priority of the quality actions as **Low**, **Medium**, **High**, or **Critical**.

Action Setting

Displays the action settings for the quality action.

- Set the **Confirmation Required** value to **True** to make the responsible user confirm the action.

- Set the **Feedback At Completion** for the system to send notifications.

- Set the **Autocomplete By Dependent** for the system to automatically update the quality action status of the parent quality action to **Completed**. For this to happen, the quality action status of all the dependent actions should be marked as **Completed**. If any one of the dependent quality actions has a different status such as **Canceled** or **Template**, the status of the parent is not updated.

  After the quality action status of the parent is updated as **Completed**, if you add dependent quality actions with a different status, the status of the parent remains the same.

Properties

Displays the properties of the quality action. You can edit the quality action to update the **Responsible User**, **Assignment Date**, and other such properties.

Shop Floor

Displays the execution type and the reference information for tasks related to the shop floor.

Task to Perform

If the quality action is submitted to a workflow, then **Task to Perform** section appears. It displays the actions that needs to be completed in the workflow.

Targets

Displays the target objects of the quality action.

Dependent Quality Actions

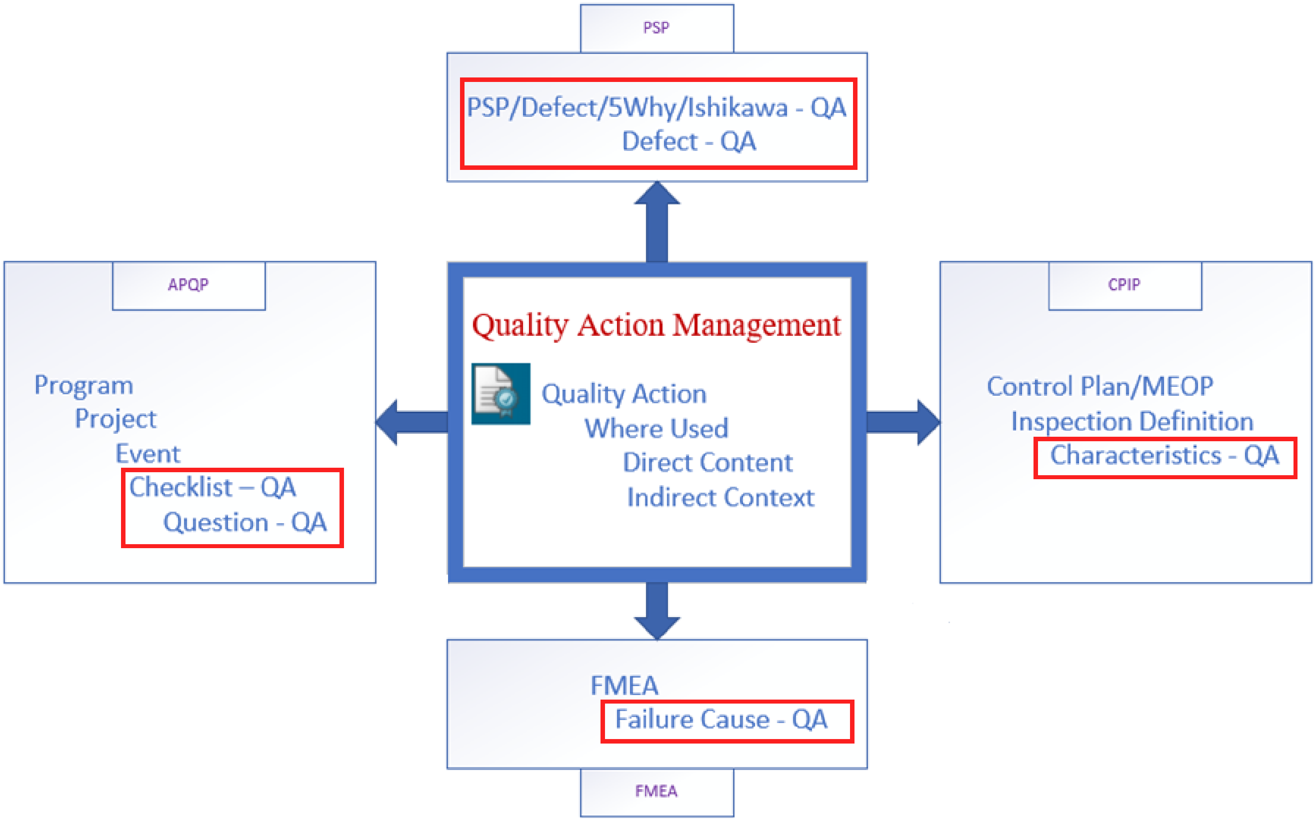
Displays the quality actions that are dependent on the quality action.

For quality actions, the **Where Used** tab displays the primary objects that are linked to the quality action. These include objects such as checklists, questions, defects, characteristics and other quality objects.

In some quality modules, there are indirect contexts associated with quality objects. These could be other objects in the hierarchy, such as the programs, projects, or events that are associated with the quality actions in APQP.

To display these indirect contexts, your administrator must set a preference to specify the types of quality actions that are displayed as the context in the **Where Used** tab.

In the following diagram, the quality objects highlighted in the red rectangle are the direct contexts and the other objects are the indirect contexts for quality actions in various quality modules.



Add dependent quality actions

1. On the **Home** page, click **EXPLORER**, select the quality action for which you want to add a dependent quality action, and click open.

2. In the **Dependent Quality Actions** section, click **Add to**.

3. Select the required option.

4. In the **Add Quality Action** panel, select the required properties.

> Note:
>
> You can track the status of a dependent quality action with a predefined workflow.

5. Click **Add**.

Edit quality actions

1. On the **Home** page, click **EXPLORER**, select the required quality action, and click open.

2. Choose **More Commands** ••• > **Edit** > **Start Edit**.

3. Make the necessary changes.

4. Choose **More Commands** ••• > **Edit** > **Save Edits**.

Assign quality actions to external users

You can add external users, that is, those who are not Teamcenter users and assign quality actions to them.

> Example:
>
> A production supervisor must resolve a quality issue with steering wheels on a car assembly line. As the assembly line workers are not Teamcenter users, the supervisor conveys corrective actions through meetings or printed instructions, ensuring that quality standards are met. To track and maintain a record of the quality action, the production supervisor adds the assembly line workers as external users to the quality action.

Procedure

1. Open the required quality action.

2. Choose **More Commands** ••• > **Edit** > **Start Edit**.

3. Under **External Users**, click **Add**.

4. Specify the **User Name** and **Email ID**.

5. Choose **More Commands** ••• > **Edit** > **Save Edits**.

   The external users are added and the user is notified through email.

Save a quality action as a new action

1. Open a quality action that has some dependent quality actions.

   > Tip:
   >
   > Make sure that you do not select any dependent quality actions.

2. Choose **More Commands** ••• > **New** > **Save As**.

3. Select or specify the following values.

a. Specify the due date.

b. Select the quality action status.

For example, if you select **Active**, the resulting quality action has the same status.

c. If you want to save the dependent quality actions, select the **Include Dependent Quality Actions** check box.

When you select this check box, the system includes only one level of dependent quality actions. If the dependent quality action has second level of child quality actions, the system does not include them.

The dependent quality actions inherit the same action status and due date as the parent quality action which you selected in step b.

4. Click the **Save As** button.

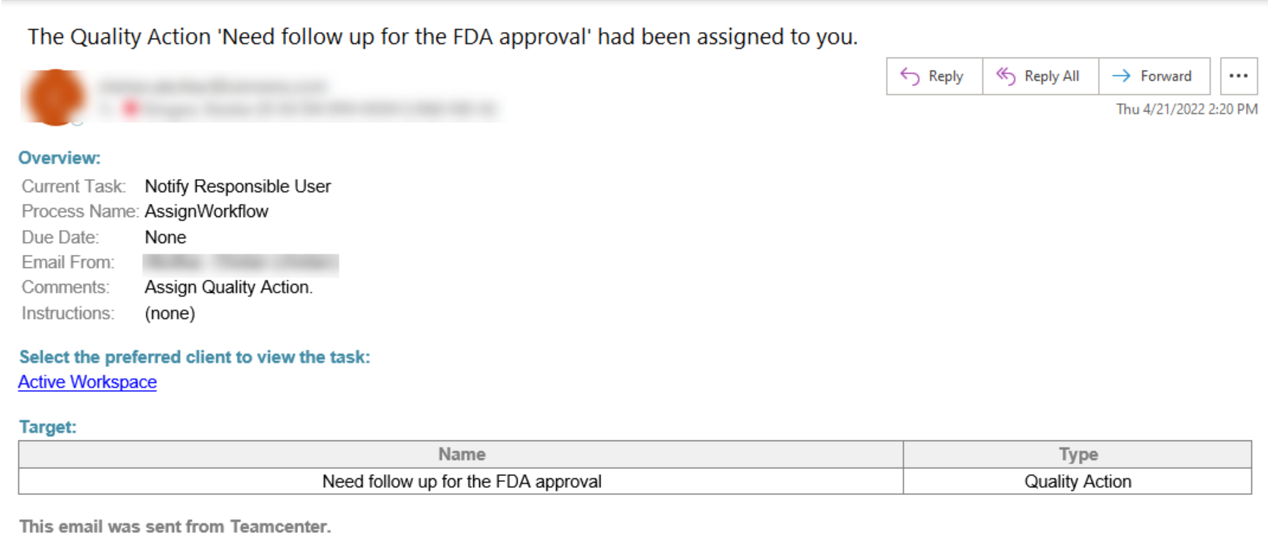
The system saves the quality action in the **Newstuff** folder. Navigate to this folder to open the quality action.

Assign a quality action to a responsible user

A quality action is created and is assigned to a responsible user who then completes the quality action.

1. In the **QUALITY ACTION** tab, select the associated quality action.
2. Choose **More Commands** ••• > click **Manage** > **Assign Responsible User**.
3. Select the appropriate user and click **Assign**.

The responsible user receives an email notification.



The user also receives an alert. To view alerts, on the primary toolbar, click **Alerts** 🔔.

View and track your quality actions in the calendar

As a business user, you can use the calendar to view and track the quality actions, that is assigned to you, with specified due dates. You can track your actions in a daily, weekly, or monthly view of the calendar.

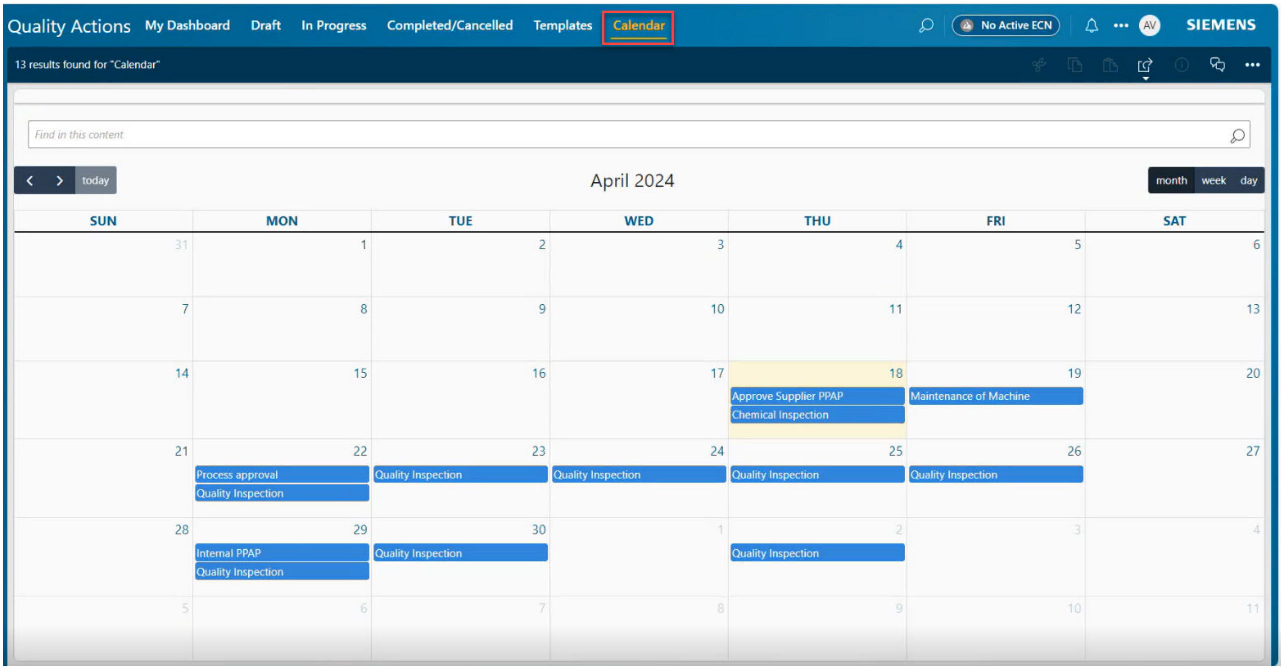
Prerequisites

- You must be assigned to a quality action with the **Due Date** for that quality action.
- You must have access to the **Quality Management** workspace.

Procedure

1. Click your profile icon.
2. From the **Workspace** list, select **Quality Management**.
3. In the **Quality Applications** section, click the **QUALITY ACTION** tile.
4. Click the **Calendar** tab.

   The calendar displays all the audits created by you.



Reassign a quality action to a new user

In some cases, you might want to reassign the quality action to a new user, who will replace the existing responsible user.

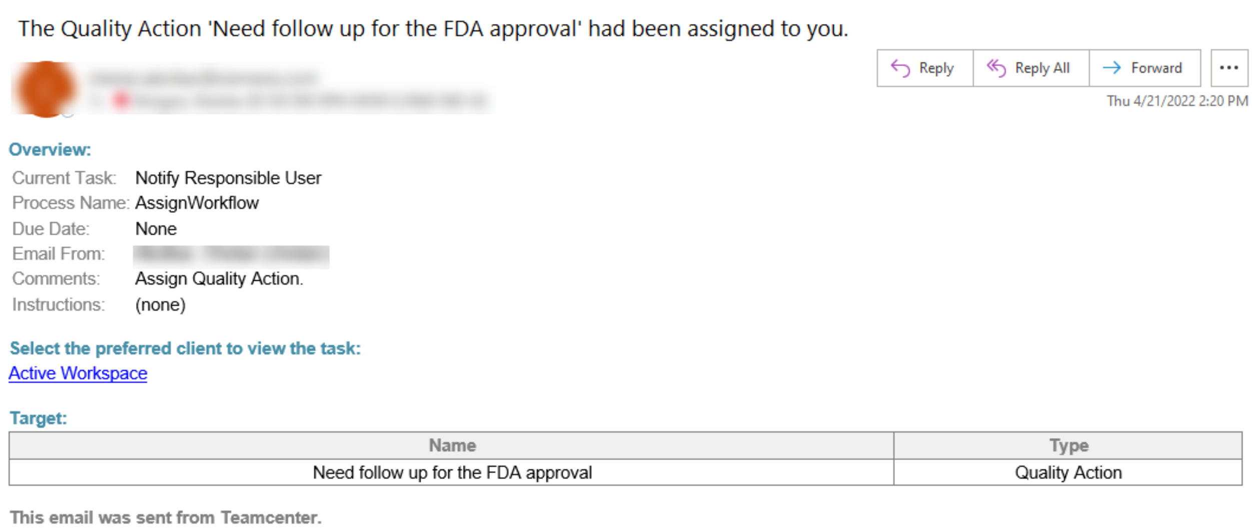
Procedure

1. In the **QUALITY ACTION** tab, select the associated quality action.

2. Choose **More Commands** ••• > click **Manage** > **Assign Responsible User**.

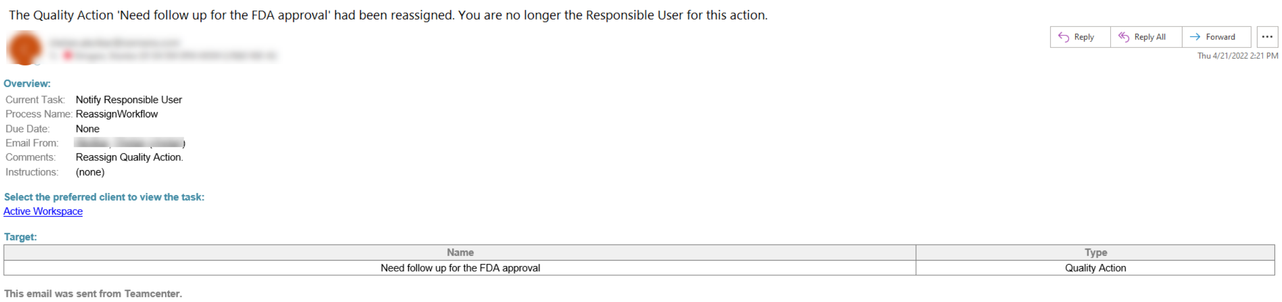
3. Select the appropriate user and click **Assign**.

   The new responsible user receives an email notification.



   The new responsible user also receives an alert. To view alerts, on the primary toolbar, click **Alerts** .

   The existing responsible user also receives an email notification and an alert.



Track and complete a quality action through a workflow

To track and complete a quality action, you must submit the quality action to a predefined workflow.

Procedure

1. On the **Home** page, click **EXPLORER**, select the required quality action, and open it.

2. Choose **More Commands** ••• > click **Manage** > **Submit to Workflow**.

3. In the **Submit to Workflow** panel, specify the required options.

   > Note:
   >
   > - The **Template** and **Name** field is automatically specified by the system.
   > - If you are manually selecting a **Template**, choose a workflow from a set of available workflows, according to the selected quality action status **Draft**, **Active**, **Confirmed**, **Canceled**, and the state of **Confirmation Required** check box.
   > - Choose Quality Action Status Change Workflow from the **Template** to submit the quality action automatically to the workflow. This workflow is available only for the quality actions created from folders.

4. Click **Submit**.

   In the **Workflow** tab, you can track the status of the workflow under the **UPCOMING TASKS** section. The buttons for the next actionable tasks are available in the **TASK TO PERFORM** section.

Set reminders for Teamcenter objects

Alerts and notifications for Teamcenter objects

Alerts and notifications are used in all Teamcenter applications. Adhering to due dates on related activities, such as checklist questions or quality actions is critical for quality competency and compliance.

When administrators configure the reminders and escalation workflows for Teamcenter objects, users responsible for completing the tasks can receive the following:

Alerts

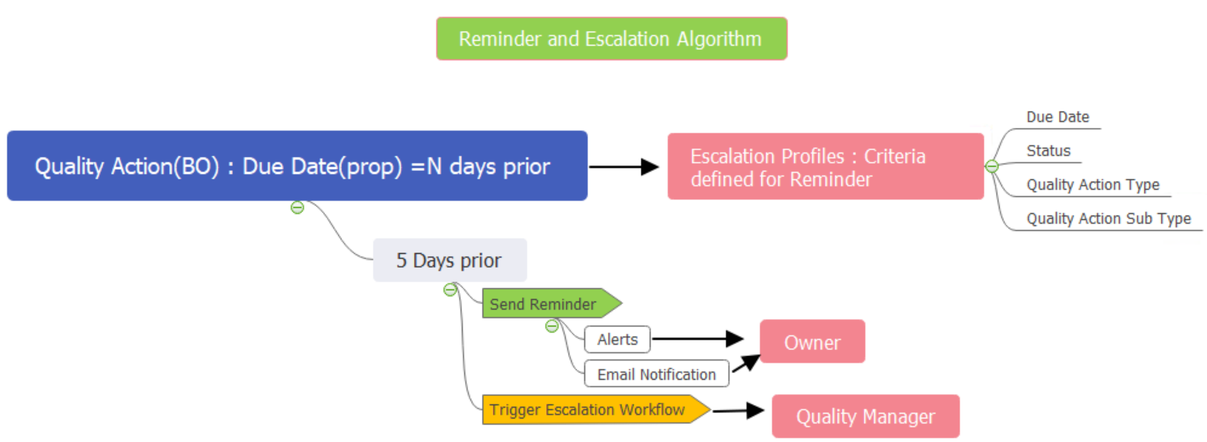
- You may receive alerts on the home page. On the global header, click **Alerts** to view them.
- You can also receive alerts in the news feed if you **subscribe to quality action events**.

Notifications

- You may receive an email on the email ID that is configured in the **Person** section of the **Organization** module in Teamcenter.
- You can receive a notifications in your inbox on the home page.

Example:

For example, you can initiate escalation workflows for Quality Actions, that are not in the required state by the due date.



Create a reminder for objects

A reminder helps you set specific prompts for you or your team to remember a task, event, or any important date. It enables better tracking and management of your tasks and deadlines.

> Example:
>
> Consider a scenario where a new vendor is created. Now, if a reminder is created for Vendor object, all the responsible users and owners within or outside the Teamcenter will receive a notification about the new vendor.

You can create reminders and trigger escalations workflows for any object in Teamcenter that must be completed by a specific date.

Procedure

1. On the **Home Page**, click **EXPLORER**.
2. Navigate to the required folder and click **Add to** ⊕.
3. In the **Add** panel, from the **Type** list, select **Reminder**.
4. Specify a name for the reminder object and click **Add**.

   > Note:
   >
   > After the reminder is created, you must **add a profile to the reminder, specify the properties**, and **mark it as active**. This will ensure that the users responsible for completing the task receive notifications or emails, reminding them of their upcoming activities.

Add a profile for a reminder

A *profile* is a set of settings that you can customize for reminders. These *profiles* allow you to create and manage various types of reminders, each with its own unique characteristics, such as different notification preferences, recurrence patterns, or associated actions.

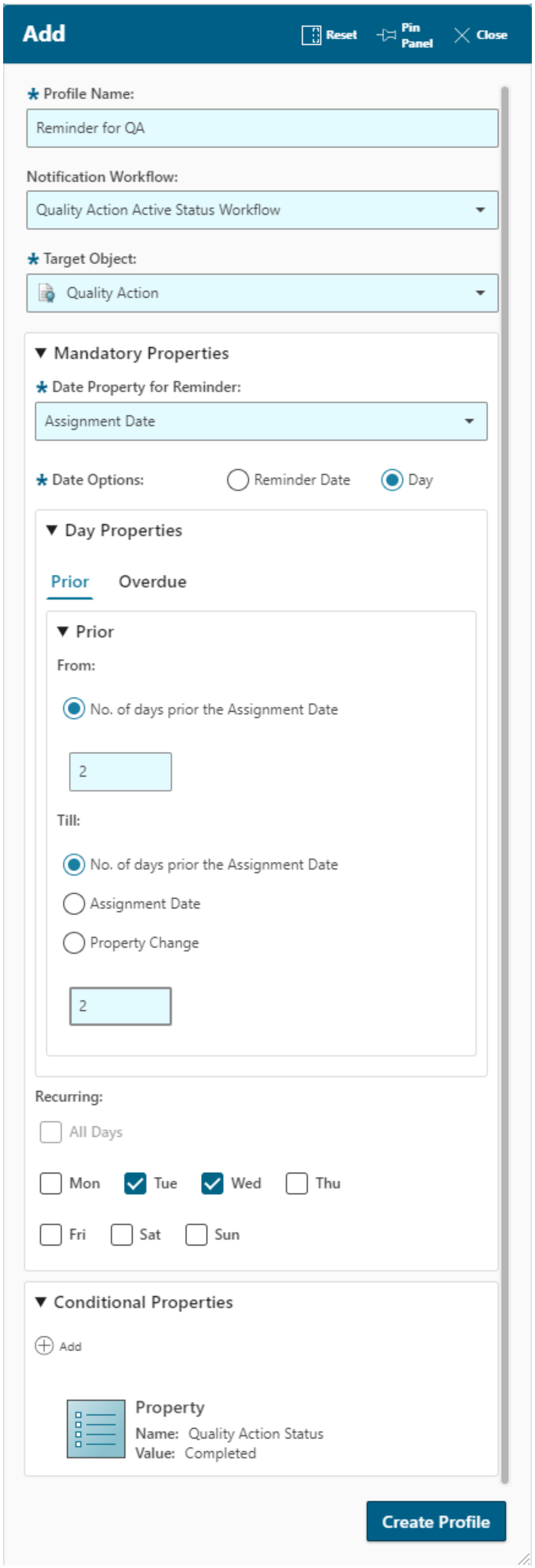
You must add a profile for a reminder to get customized notifications.

Procedure

1. On the **Home Page**, click **EXPLORER**.
2. Navigate to the required reminder and click open.
3. In the **Profiles** section, click **Add**.

4. In the **Add** panel, specify the required properties.

Option	Description
Profile Name	Specify a name for the profile.
Notification Workflow	Select a **Notification Workflow** to send a reminder for a task within a workflow. Note: • If a **Notification Workflow** is selected, reminders are sent to both the end user of the selected **Notification Workflow** and the owner of the target object. • If a **Notification Workflow** is not selected, then by default, a reminder is sent only to the owner of the target object.
Target Object	Select the business object for which you want to set the reminders.
Date Property for Reminder	Select the milestone for the reminder. The list of values changes based on the **Target Object** selected in the previous step. The values for the milestone include **Checked-Out Date**. In this case, the user receives reminders from this date.
Date Options	Select the relevant option. The list of values changes based on the **Date Property for Reminder** selected in the previous step. • **Reminder Date**: Select this to send the reminder based on the date property specified earlier. • **No of Days**: Select this to specify the number of days prior to and after the due date when you want the reminder to be sent.
Recurring	Specify recurrence for the reminders based on the days of the week.
Conditional Properties	Specify the properties to trigger reminders and escalation workflows.


Add
Reset
Pin Panel
Close
* Profile Name:
Reminder for QA
Notification Workflow:
Quality Action Active Status Workflow
* Target Object:
Quality Action
Mandatory Properties
* Date Property for Reminder:
Assignment Date
* Date Options:
Reminder Date
Day
Day Properties
Prior
Overdue
Prior
From:
No. of days prior the Assignment Date
2
Till:
No. of days prior the Assignment Date
Assignment Date
Property Change
2
Recurring:
All Days
Mon
Tue
Wed
Thu
Fri
Sat
Sun
Conditional Properties
Add
Property
Name: Quality Action Status
Value: Completed
Create Profile

5. Click **Create Profile**.

   The specified profile properties for a reminder are listed in the **Profiles** section. You can create multiple profiles for a reminder if required.

Mark a reminder as active

You can create reminders and trigger escalations workflows for any tasks that must be completed by a due date. The default state of a reminder is false or inactive. To trigger notifications or emails that remind responsible users or owners of their upcoming tasks, you must activate the reminder.

Procedure

1. On the **Home Page**, click **EXPLORER**.
2. Navigate to the required reminder and click open.
3. Choose **More Commands** ••• > **Edit** > **Start Edit**.
4. Select the **Is Reminder Active** check box.
5. Choose **More Commands** ••• > **Edit** > **Save Edits**.

Mark a reminder as deactive

To stop sending notifications or emails that remind the responsible users of their upcoming tasks, you must deactivate the reminder.

> Note:
>
> If you deactivate a reminder, then all the profiles included in that reminder will also be deactivated.

Procedure

1. On the **Home** page, click **EXPLORER**.
2. Navigate to the required reminder and click open.
3. Choose **More Commands** ••• > **Edit** > **Start Edit**.
4. Clear the **Is Reminder Active** check box.
5. Choose **More Commands** ••• > **Edit** > **Save Edits**.

Add a quality action as a template in the quality master data

You can add a quality action as a template in the **QUALITY MASTER DATA** library.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile, and click the **Quality Actions** tab.
2. Choose **More Commands** ••• > click **New** > **Add Quality Action as a Template**.
3. In the **Add Quality Action as a Template** panel, specify the **Name** and **Description**.
4. Click **Add**.

   The quality action is created as a template and added to the **QUALITY MASTER DATA** library.

Add template quality action to checklist specification

You can add a quality action to the **Checklist** available in the **QUALITY MASTER DATA** library. If this checklist with a quality action is added to an event, all the properties (attachments, the template, and dependent quality actions) of the quality action are carried forward to the event.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile, and click the **Checklist** tab.
2. Select the required checklist, chapter, question, or sub question.
3. Click the **Quality Actions** tab.
4. Click **Add** ⊕.
5. In the **Add Quality Action As Template** panel, specify **Name** and **Description**.
6. Click **Add**.

   The quality action is added with the quality action status as a template.

Reassign a quality action to an object by replacing the default quality action template

You can use the default quality action template as reference and create quality actions. Later, you can search for the default template and then replace it with a specific quality action as required.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.

2. In the **Quality Actions** tab, select the **Default Quality Action Template** from the list.

3. Click the **Where Used** tab.

   The **WHERE USED** section lists all the objects where the template is used.

4. Select the row corresponding to the reference where you want to replace the default template and click **Reassign**.

5. In the **Reassign Template Quality Action** panel, select an alternative quality action from the list.

   You can use filters to narrow your selection.

6. Click **Reassign**.

Subscribe to quality action objects

Quality managers use quality actions to create, execute, and track quality-related tasks. After creating quality actions, the quality manager assigns them to the users responsible for them. They complete the quality action by providing a comment. To track the status change of quality actions, you can subscribe to quality actions and get notified when they are modified.

1. Open the required program plan.

2. Choose **More Commands** ••• > **Share** > **Follow**.

3. In the **Follow** panel, specify the frequency and priority. You can also add other users as followers.

   - **Event Type**

     > Note:
     >
     > If you are already subscribed to an event type, it does not appear in the **Event Type** list.

     Select a single event from the list, for example, **Modify**, to follow this whenever the RYG rating is modified.

   - **My Events**

     Select **My Events** to follow multiple events on an object.

- **Name**

  An editable prepopulated field is displayed when you select a single object to follow.

- **Frequency**

  Select from **Immediately** (not collated), **Daily** (daily digest), and **Weekly** (weekly digest). The default is **Immediately**.

- **Priority**

  Select from **Normal**, **High**, and **Low**. The default is **Normal**.

- In the **Followers** section, click **Add Follower** ⊕ to add a follower. In the **Users** section, select the user you want to add and click **Add**.

4. Click **Follow** to follow the object.

5. Verify that your subscription is created. From your Home page, click the **SUBSCRIPTION** tile to display your subscriptions. Then, click the **My Subscriptions** tab, and select the object to which you just subscribed.

Search for quality actions

1. Enter the search criteria in the global search, and click .

2. In **Filters**, from **Type**, select **Quality Action**.

   You can also select other required filter options.

3. Select the required quality action and click **Open** .

4. Track a dependent quality action through workflow

A dependent quality action has a predefined workflow with multiple paths according to the selected quality action status and quality action settings. If you choose a particular path in the workflow, the other paths are disabled.

To track a dependent quality action through a workflow, while adding dependent quality actions, you can define its status as **Draft**, **Active**, or **Confirmed** and select or clear the **Confirmation Required** check box. You can create multiple workflows by choosing different combinations.

Procedure

1. Navigate to the required quality action and select it.

2. In the **Overview** tab, under **DEPENDENT QUALITY ACTIONS** section, click ⊕.

3. Select one of the following options, as relevant: **Add Quality Action**, **Add Quality Action as a Template**, or **Add Quality Action from a Template**.

4. Under the **Add Quality Action Panel** panel, specify **Name** and **Quality Action Status**, and select or clear the **Confirmation Required** check box.

   The workflow for tracking the dependent quality action is created, according to the selections made for **Quality Action Status** and **Confirmation Required**. You can also specify other fields in the panel as required.

   The following table shows the workflows available for various statuses of the quality action and the **Confirmation Required** check box.

Quality Action Status	Confirmation Required check box selection	Applicable workflow	Description
Draft	Not selected	Quality Action without Confirmation Status Change Workflow	The workflow starts from the Draft status, and the confirmation path in the workflow is disabled.
	Selected	Quality Action with Confirmation Status Change Workflow	The workflow starts from the Draft status, and the confirmation path in the workflow is enabled.
Active	Not selected	Quality Action Active without Confirmation Status Workflow	The workflow starts from the Active status, and the confirmation path in the workflow is disabled.

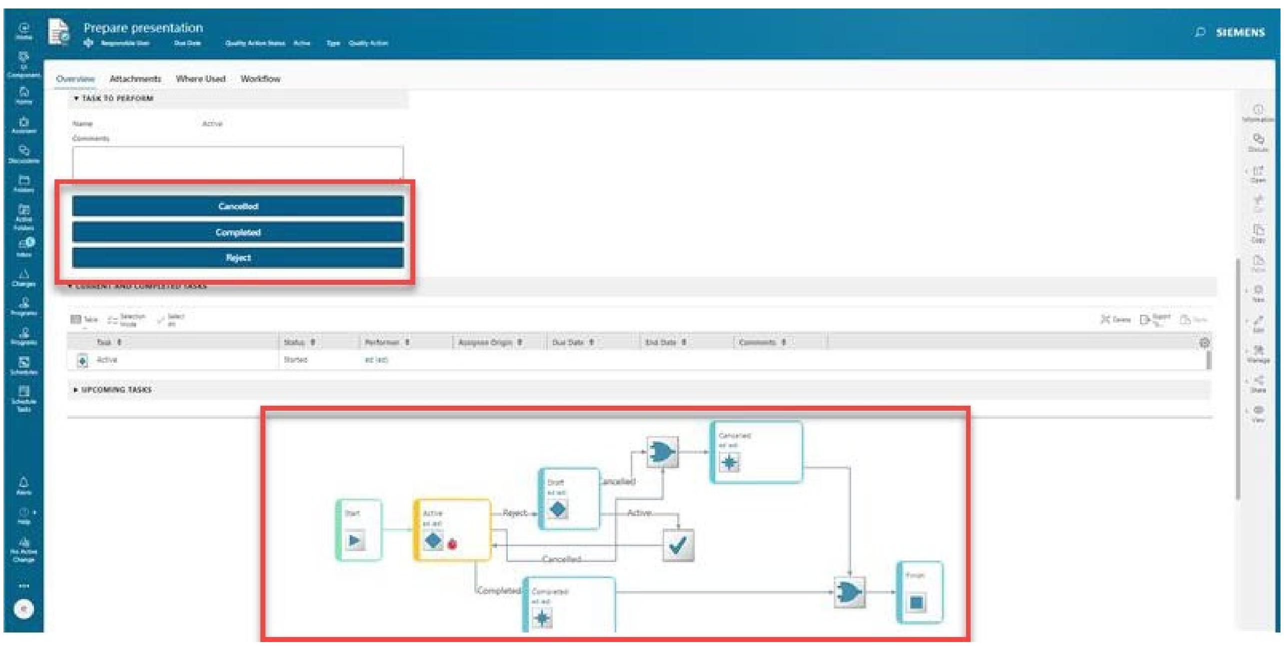
Quality Action Status	Confirmation Required check box selection	Applicable workflow	Description
	Selected	Quality Action Active with Confirmation Status Workflow	The workflow starts from the Active status, and the confirmation path in the workflow is enabled.
Confirmed	Not Applicable	Quality Action Confirmed Status Workflow	The workflow only requires to be completed, and no other paths are shown in the workflow.

5. Click **Add**.

   The dependent quality action is added to the list.

6. Open the dependent quality action.

   In the **Overview** tab, you can track the status of the workflow under the **UPCOMING TASKS** section. The buttons for the next actionable tasks are available in the **TASK TO PERFORM** section.



5. Use quality action status change workflows for working on quality actions

A **Quality Action Status Change** workflow is a predefined workflow that you can use to complete a quality action.

Procedure

1. Create a quality action.

   The quality action is automatically submitted in the **Draft** status. The user receives a notification in the **Inbox**.

   > Note:
   >
   > The user can create a quality action from any status in the workflow.

2. Go to the **Inbox**, open the **Draft** notification, and click **Complete**.

   The user receives notifications in the **Inbox** for activating or canceling the quality action.

3. Go to the **Inbox** and open the **Active** notification.

4. Click **Complete**.

   The user receives notifications in the **Inbox** for confirming or rejecting the quality action. In addition, the **Activation Date** is displayed.

5. Go to the **Inbox** and open the **Confirmed** notification.

6. Click **Complete**.

   The user receives notifications in the **Inbox** for completing the quality action. In addition, **Confirmed By** and **Confirmation Date** is displayed.

7. Go to the **Inbox** and open the **Completed** notification.

   The quality action is completed. The **Completed By** and **Completion Date** is displayed. Also, the user receives an email notification.

Note:

- If you select and complete the **Canceled** notification in the **Inbox**, the quality action is canceled.
- If you select and complete the **Reject** notification in the **Inbox**, the quality action is canceled.

6. Share a quality action and reminders with other sites in a Multi-Site Collaboration network

After creating a quality action and a reminder in your site in a Multi-Site Collaboration network, you can share these with the relevant sites that need to work on them.

To do this, you must first publish the quality action and reminder with the required sites. Then, specify additional sharing details, such as the destination sites and several transfer options.

Prerequisites

- The administrator has installed and configured Multi-Site Collaboration for all sites in your network.
- The administrator has enabled the quality actions and reminders for publishing and transferring to other sites.

Procedure

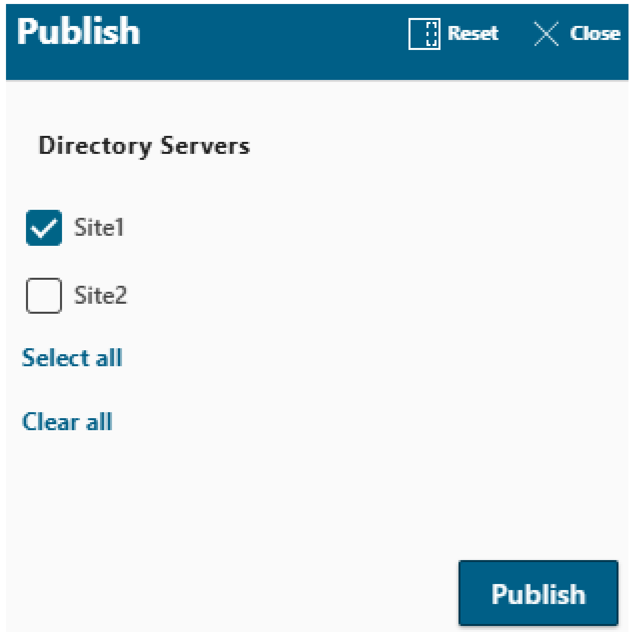
1. Open the quality action or reminder that you want to share.

   If you are working in the **Quality Management** workspace, click the **QUALITY ACTIONS** tile, and select and open the required quality action or reminder.

2. To publish the quality action or reminder, do the following:

   a. Choose **More Commands** ••• > **Share** > **Publish**.

   b. In the **Publish** panel, select the required sites, and click **Publish**.



When you publish a quality action or reminder, the globe with a share symbol appears next to the name of the quality action or reminder.

3. To cancel publishing a quality action or reminder, do the following:

   a. Choose **More Commands** > **Share** > **Unpublish**.

   b. In the **Unpublish** panel, select the required sites, and click **Unpublish**.

      When you cancel publishing a quality action or reminder, the globe with a share symbol is removed from the name of the quality action or reminder.

4. To share the quality action or reminder, do the following:

   a. Click **More commands** > **Share** > **Share with Sites**.

      The **Share with Sites** panel is displayed, listing target sites and several transfer options.

   b. From the **Destinations** list, select one or more remote sites to be used as the target destinations.

      The **Destinations** list is filtered as you type; type the first few characters of the site's name to view the site you want.

   c. From the **Option Set** list, select the transfer option set to use when sharing objects.

      The transfer option set defines the configuration rules when transferring data between sites. The available option sets vary depending on your site's configuration.

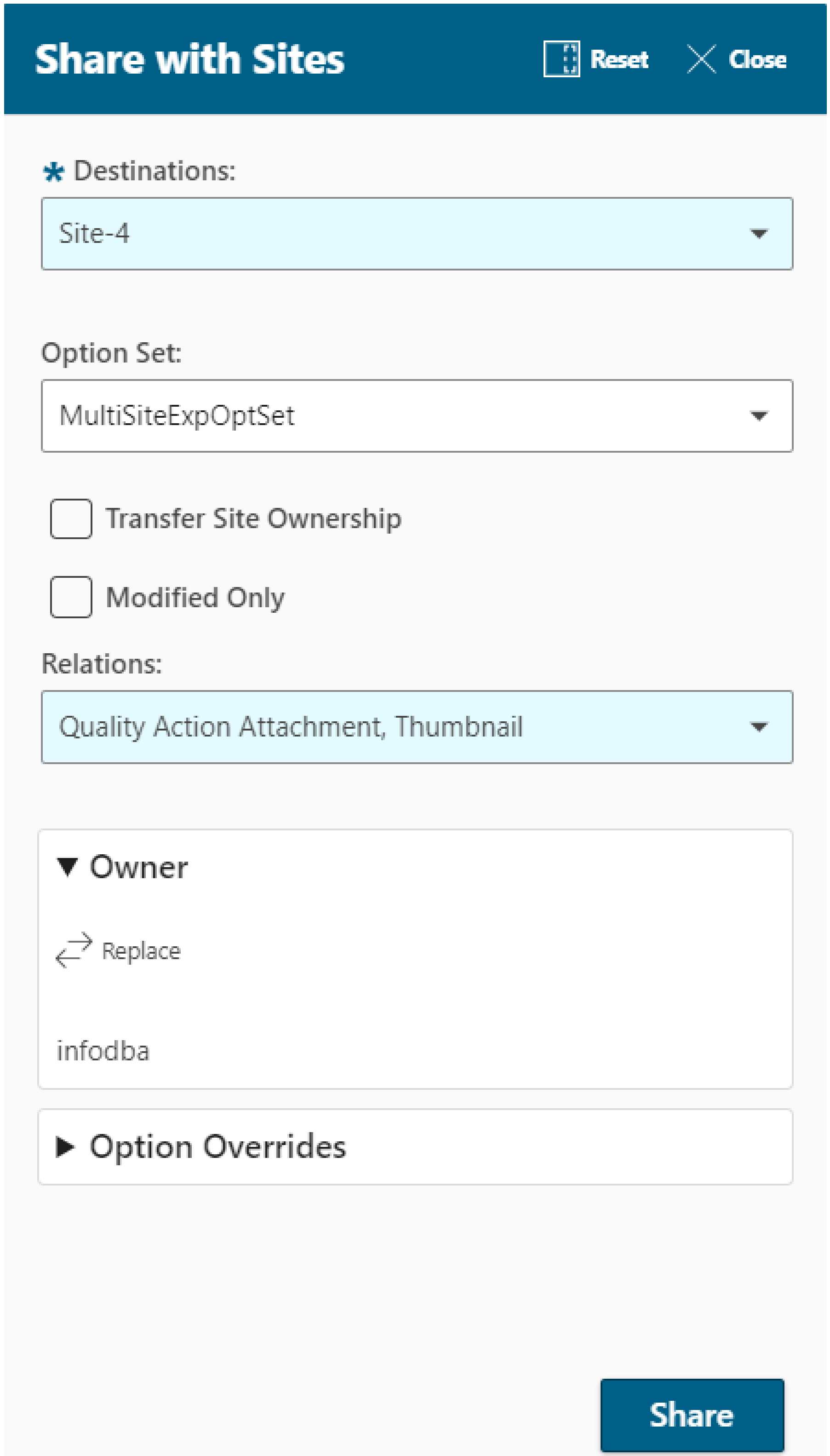
d. To share a quality action or reminder only when it has been modified since the last time it was exported to the destination site, select **Modified Only**.

e. To share related data, from the **Relations** list, select each object relation to share with the destination sites.

> Example:
>
> You can choose to share the quality action attachment and thumbnail to share with the quality actions or reminders.

f. To transfer the site ownership of the quality action or reminder to the destination site, select **Transfer Site Ownership**.

   When you transfer the site ownership, all revisions of the quality action or reminder are shared.



g. (Optional) Change the owner of the transferred quality action or reminder after it is transferred to the remote site. In the **Owner** section, click **Replace**, select the new owner, and click **Replace**.

Note:

Only one site can own the quality action or reminder at a time. The site with ownership can modify the quality action or reminder. The other sites contains a replica of the quality action or reminder.

h. Review and adjust the transfer options by clicking **Override Options** to open the **Override Options** panel, where you can choose the options to override, and click **Override**.

   The available options vary depending on the configuration of the selected transfer option set. You can modify the options available to override by editing the transfer option sets as described in *PLM XML/TC XML Export Import Administration*.

i. Click **Share** to share the quality action or reminder with the destination sites.

   You receive a notification when the transfer is complete. Send an email or notification message to the team members of the destination sites so that they can search for it and begin working on it in their site.

j. If you make updates to the quality action or reminder, you can share the updates with the destination site by repeating steps **a** through **i**.

   Ensure that you select **Modified Only** to share the updates since the last time it was exported to the destination site.

5. After you receive an email or notification message about the shared quality action or reminder, in the destination site, to access the quality action or reminder, do the following:

   a. In **Advanced Search**, select **General**, and then **Quality Actions** as the type of search, and click **Search**.

   b. In the search results, select the shared quality action or reminder, and open it to work on it.

7. Complete the quality action

Search for quality actions assigned to a specific user

1. Enter the search criteria in the global search, and click .
2. In **Filters**, from **Type**, select **Quality Action**.
3. In **Filters**, from **Responsible User**, select a user.

   > Note:
   >
   > You must select **Responsible User** in case you want the quality action to show in the **My Activity List** page.

4. In **Search Filters**, select the quality action and click **Open** .

Complete the quality action

1. Search for the quality action and open it.
2. Type a comment and click the **Confirm** button.
3. Click the **Complete** button.