



TEAMCENTER

Quality Audit

Teamcenter 2412

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1. About Quality Audit

Quality Audit provides an end-to-end solution to plan, schedule, execute, and track audits and assessments in Teamcenter.

You can:



- Schedule audits for companies, people, processes, or parts.
- Use audit guideline objects to specify the various standards and parameters that you want to include in the audit process.
- Use quality checklists to create the questionnaires that are required for audit interviews. You can also use these to document feedback and observations.
- Report the audit findings as issues and assign these to the users responsible for taking the required actions.
- View reports that can help in communicating the audit results effectively.
- Track the due dates of tasks assigned to the audit participants or responsible users.

The Quality Audit solution supports a wide variety of audit approaches such as process audits, system audits, supplier audits, and assessments.

Quality Audit is part of the Teamcenter Quality suite of products that helps you examine whether processes, requirements, and guidelines meet the required standards.

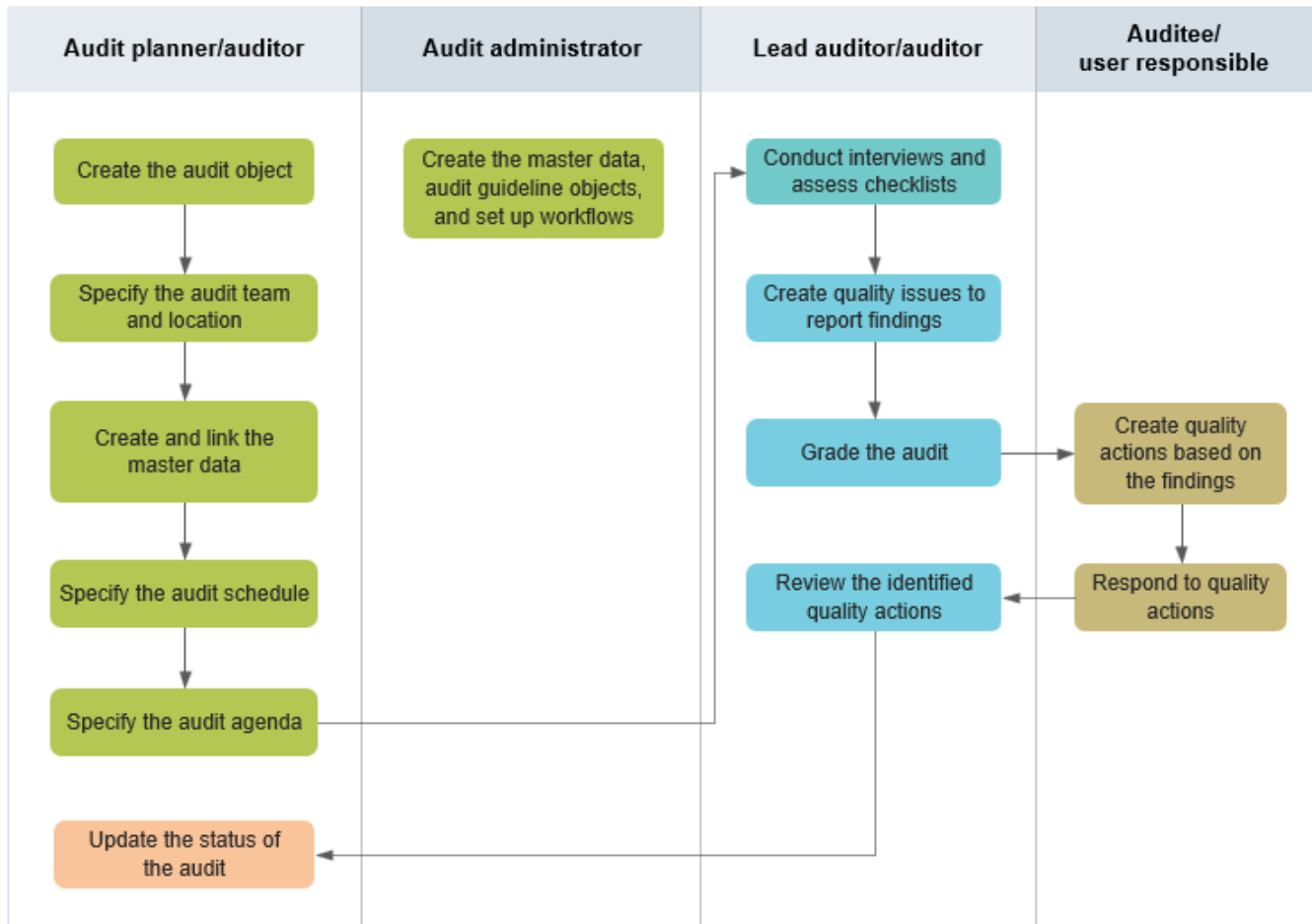


Where do I go from here?

 Administrator	To know which features are required to install Quality Audit, see Install Quality Audit.
 Business User	
How do I create master data and associate it to quality audits?	Before executing the audit and assessing the questionnaire, you must first create the master data in the Quality Master Data library and then associate the master data to the audit .
How do I work with checklists in Teamcenter?	To know how you can work with checklists in Teamcenter, refer to the section on create a checklist in the Quality Master Data library. You can also find information about checklists and their properties and about adding questions to them (among other tasks).
How do I perform audits in Teamcenter?	The Quality Audit process in Teamcenter is largely based on the quality audit framework followed by the industry. See the Quality Audit process workflow for the sequence of tasks performed by different users of Quality Audit using Teamcenter. You can also create quality audit guidelines and create finding guidelines .
How do I report the audit findings?	To investigate a potential problem that must be addressed, you can capture it as an issue. For

	more information on how to do this, see Quality Issues.
After performing an audit, how can I track other quality-related tasks and the identified issues?	For details on how to create, execute, and track the preventive actions and other quality-related tasks, see the information provided in Quality Actions.

2. The Quality Audit taskflow process



As an example, consider a scenario where there are issues in the production line of the steering wheel assembly of car. The problem occurs for a few weeks, and isolated incidents are resolved, but the issues keep occurring. Realizing that the issues could be related to oversight in processes, the company decides to conduct an ad-hoc internal audit to inspect all the steps in the steering wheel production process.

While planning the audit, the audit planner specifies the objective of the audit: to analyze the production process of the steering wheel assembly. As the audit is conducted on site, the audit planner specifies the audit location accordingly. The audit planner then adds the shop floor personnel, supervisor, and management representatives as the audit participants. The audit schedule and the agenda are also specified so that the participants can plan their schedule and availability. The questionnaires that are assessed during the audit execution phase are created as checklists in the **Quality Master Data** library and associated with the audit.

During the audit execution phase, the lead auditor conducts interviews with the participants and updates the checklist to record the audit findings.

The lead auditor grades the audit based on the severity of the findings and prepares an audit summary report. During the audit review with the team the auditor adds actions to each finding, if needed. Actions can also be defined at a later stage.

The users respond to the quality actions assigned to them and update the status of their assigned tasks.

Finally, after following up on the status of the various findings and the required actions, the auditor updates the status of the audit and closes it.

3. 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.

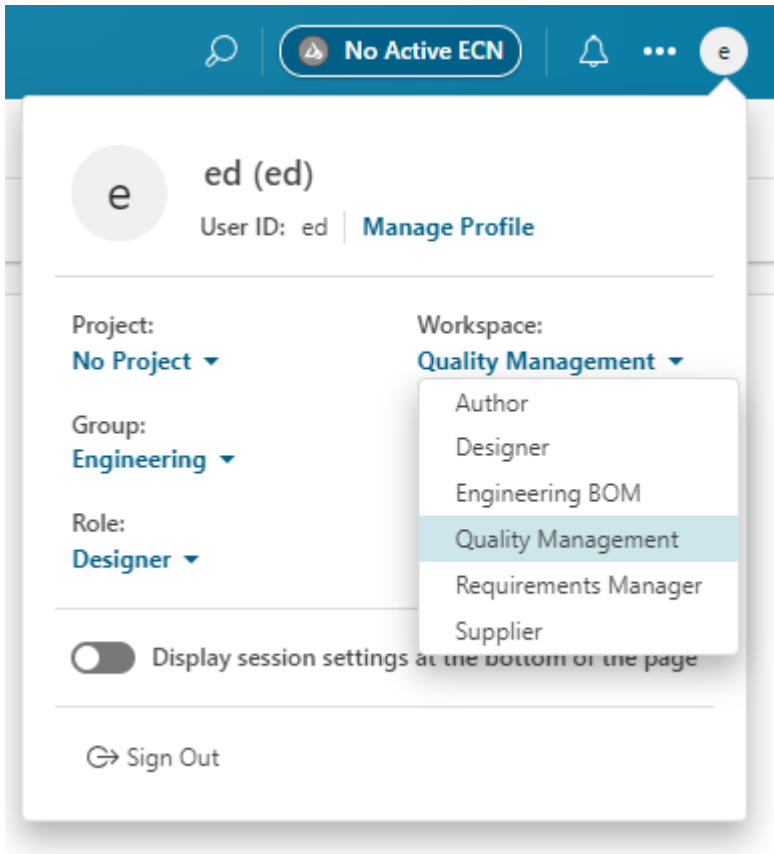
Your administrator must make the **Quality Management** workspace available for your organization's groups and roles.

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

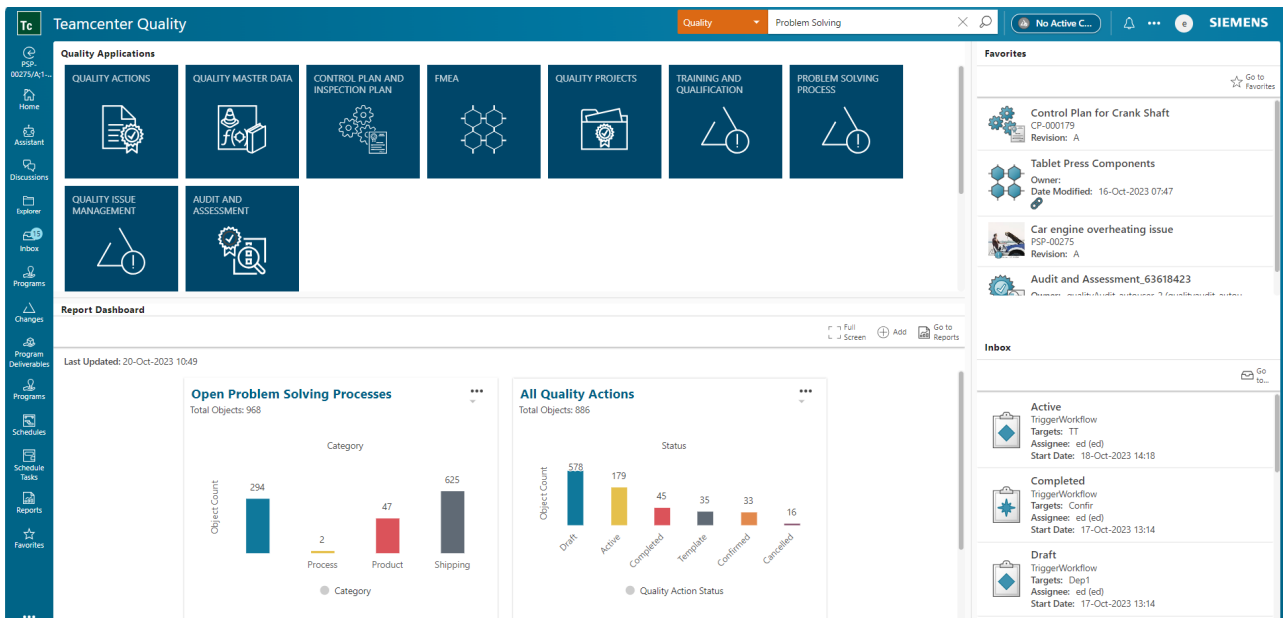
To access the tile for your Quality application in the **Quality Management** workspace:

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

3. 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.



4. Manage a quality audit plan

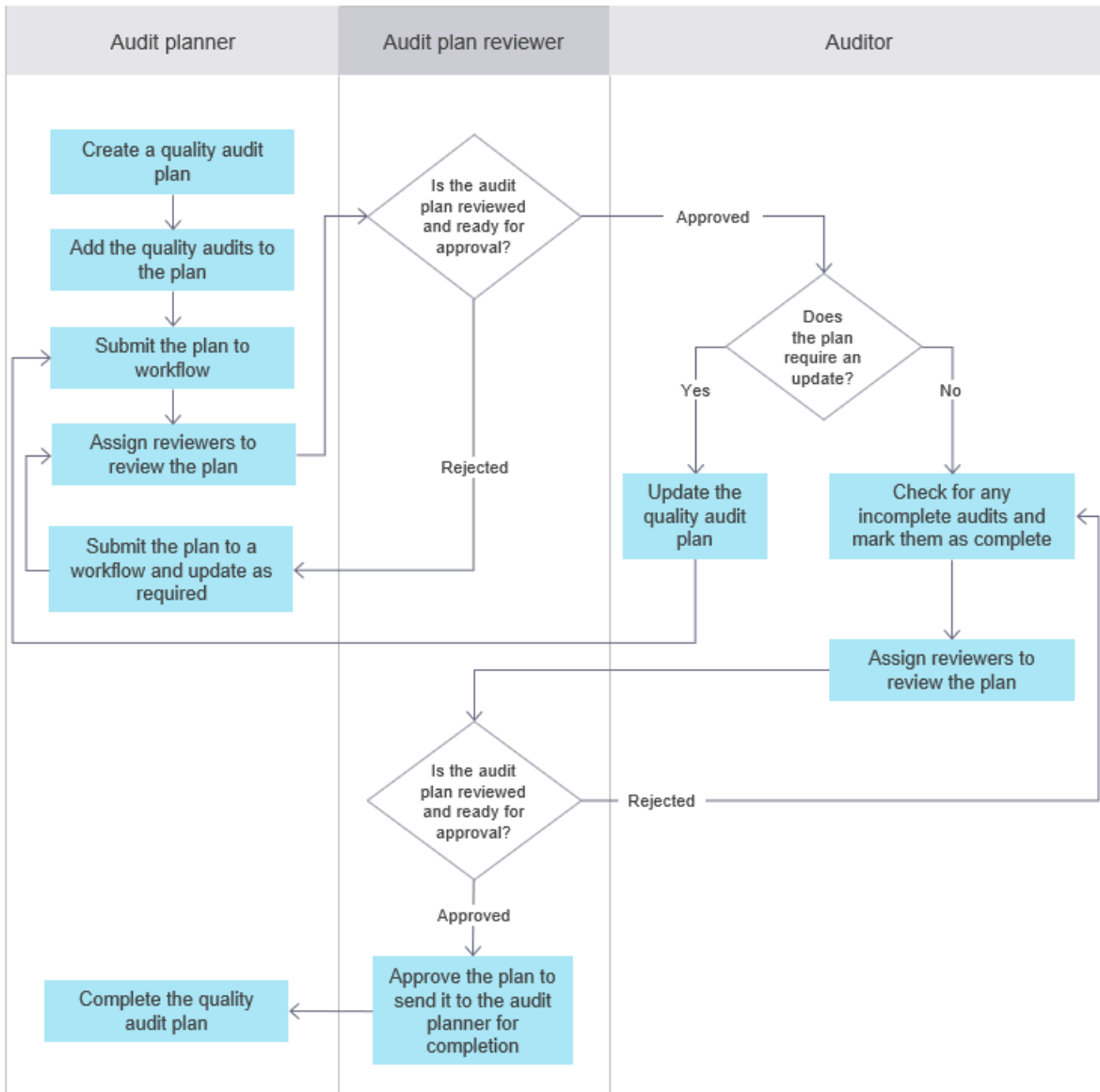
Audit planning overview

An *audit plan* is a collection of one or more audits that focus on a specific purpose and are planned over a defined period of time. The audit plan provides an overview of the number of audits, the blocked resources, and the overall cost. The audit planner creates the audit plan according to the company size, the number of audits, and different scopes of the specified audit plans and decides the period of an audit. You can plan an audit to happen over a yearly, quarterly, or daily basis.

Example:

Consider a scenario where a company has different organizational units in multiple zones and countries. Each organizational unit has its quality management and rules to be implemented. To get certified by ISO standards, the company needs to compare all the internal audits. To do this, the audit planner creates an audit plan. To compare all the internal ISO 9001 internal audits, the quality management department of the company creates an audit plan for these internal audits.

The audit planner creates a general plan such as FY2022-Internal or a plan as per different zones or organizational units such as FY2022-Internal-MOM-DACH and FY2022-Internal-MOM-APEC.



Create an audit plan

As an audit planner, you can create an quality audit plan.

Procedure

1. On the **Home** page, click **EXPLORER**.
2. In **Contents**, click **Add to** ⊕.
3. In the **Add** panel, from the **Type** list, select **Quality Audit Plan**.
4. In the **Properties** section, specify the required properties.

5. Click **Add**.

The audit plan is created. You can now add the audits to the audit plan.

Add audits to the audit plan

You can add audits to an audit plan.

Prerequisites

To add audits, you must create an audit plan.

Procedure

1. Open the required audit plan.
2. In the **Audits** section, click **Add** ⊕.
3. In the **Add** panel, specify the required properties.

Note:

- An audit can be added or associated to only one audit plan.
- One or more audits can be added to an audit plan.

4. Click **Add**.

The audits are added to the audit plan.

Add audit templates to the audit plan

You can add audit templates to an audit plan.

Prerequisites

To add audit templates, you must create an audit plan.

Procedure

1. Open the required audit plan.
2. In the **Audit Template** section, click **Add** ⊕.

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

Note:

- An audit can be added or associated to more than one audit plan.
- One or more audit templates can be added to an audit plan.


4. Click **Add**.

The audit template is added to the audit plan.

Submit the audit plan to a workflow

As an audit planner, you must submit the quality audit plan for review and approval through a workflow.

Procedure

1. Open the required quality audit plan.
2. Choose **More Commands** **...** > click **Manage**  > **Submit to Workflow**.

In the **Submit to Workflow** panel, the default workflow **Audit Plan Workflow** is automatically selected.

3. Click **Submit**.

The quality audit plan is now ready to be reviewed and approved.

Send the audit plan for review

After the audit planner specifies all the activities to be completed or specified before performing the audit, the audit plan is reviewed by audit plan reviewers. There can be more than one audit plan reviewers.

1. Open the required quality audit plan.
2. Click the **Workflow** tab.
3. In the **Task to Perform** section, enter your comments in the **Comments** box.
4. Click **Complete**.
5. In the **Task to Perform** section, under **Reviewers** section, click **Add**.

6. Select the required reviewers for the audit plan.

Note:

You can add only Teamcenter users as audit plan reviewers.

7. Click **Complete**.

The assigned reviewers can now review the quality audit plan.

Approve the quality audit plan

The reviewers of the audit plan approve or reject the plan after reviewing it.

Procedure

1. Open the required quality audit plan.
2. Review the quality audit plan.
3. Do one of the following:
 - To approve and release the quality audit plan to the next step, click **Approve**.OR
 - To reject the quality audit plan, click **Reject**.

Note:

- All the assigned reviewers must approve the quality audit plan.
- If a quality audit under the quality audit plan is not initially submitted to the workflow, it will be automatically submitted after the approval.

Close an audit plan

As an audit planner, after all the audits in the audit plan are complete, you must close the quality audit plan to complete the process.

Procedure

1. Open the required quality audit plan.
2. Click the **Workflow** tab.

3. In the **Task to Perform** section, enter your comments in the **Comments** box.
4. Click **Complete**.

The quality audit plan is closed.

5. Managing a quality audit

Audit overview

During the audit planning phase, the audit planner specifies all the activities to be completed or specified before performing the audit.

The audit planner creates the *quality audit* object and specifies its properties such as the audit objective and the audit method. The audit planner also specifies the following:

- **Audit team:** The personnel who participate in the audit or who are responsible for the execution of the audit. These include various roles such as lead auditor, moderator, and the auditee or user responsible.
 - **Members:** The personnel who are interested in the outcome of the audit findings. Audit members may not be assigned to any audit roles in particular.
 - **Auditee:** The people and organization who are being audited are considered to be the auditee.
 - **Lead Auditor:** A qualified person with ISO certification or any other certification who is required to execute an audit. Only one lead auditor is specified for an audit.
 - **Co-Auditor:** A qualified person with ISO certification or any other certification who accompanies the lead auditor during the audit.

Note:

When you are specifying the lead auditor or the co-auditor, make sure that you select qualified users. You can **create profiles for qualified users** and add them in the respective audit roles. If Training and Qualification is installed, you can select the qualified users for the lead auditor and co-auditor roles.

- **Audit location:** The location of the audit. This can be specified as remote, on-site, or a combination of both remote and on-site.
- **Audit schedule:** The tentative planned start and end dates of the audit.
- **Audit agenda:** The detailed agenda of the audit. This helps the participants of the audit to plan their schedule and availability.
- **Checklists:** These checklists contain the questionnaires that are used during the execution phase of the audit. Based on the standards, the audit planner creates these checklists in the Quality Master Data library and links these checklists to the audit object.

Example:


Consider a scenario where there are issues in the production line of the steering wheel assembly of a car. The problem occurs for a few weeks, and isolated incidents are resolved, but the issues keep occurring. Realizing that the issues could be related to oversight in processes, the company decides to conduct an ad-hoc internal audit to inspect all the steps in the steering wheel production process.

While planning the audit, the audit planner specifies the objective of the audit: to analyze the production process of the steering wheel assembly. As the audit is conducted on-site, the audit planner specifies the audit location accordingly. The audit planner then adds the shop floor personnel, supervisor, management representatives, and those who want to keep a track of the audit, as the audit members. The audit schedule and the agenda are also specified so that the participants can plan their schedule and availability. The questionnaires that are assessed during the audit execution phase are created as checklists in the **Quality Master Data** library and associated with the audit.

Create an audit

During the audit planning phase, the audit planner creates the audit object by specifying the audit name, description, and the audit guideline object.

You can **create a quality audit guideline** to facilitate the audit creation task. For example, you can create quality audit guidelines and configure the finding types, or industry standards that are available when users are creating a particular type of audit.

1. On the **Home** page, click **EXPLORER**.
2. Choose **More Commands** **...** > **New**  > **Add**.
3. In the **Add** panel, type **Quality Audit** and select **Quality Audit**.
4. Specify the name and description.
5. From the **Quality Audit Guideline** list, select the required guideline.

Note:

Do not select the **Template** check box as it will create an audit template instead.


Note:

You can track the status of your quality audit if a **workflow is assigned to the selected quality audit guideline**.

6. Click **Add**.


Specify the audit properties

After creating the quality audit object, the audit planner specifies the properties for the audit. These include the audit objective, audit method, planned and actual start and end dates, and expiration dates of the audit.

1. Navigate to the required folder and open the audit object.
2. Click **Edit** .
3. In the **Properties** section, specify the required properties.
4. In **Planning Properties**, specify the required properties.
 - **Actual Start Date** is the date when the audit starts. When the audit is initiated, you can edit the audit properties to specify this date. This helps to analyze if the audit was carried out as per the schedule.
 - **Actual End Date** is the date when the audit ends. When the audit is completed, you can edit the audit properties to specify this date. This helps to analyze if the audit was carried out as per the schedule.
5. In **Summary Properties**, specify the required properties.
 - **Audit Detailed Summary** is the field where you can add in-depth details about your audits. You can also include images, such as pictures of the audited areas, charts, or graphs that show the audit findings, safety signs, labels, certifications and so on.
6. Click **Save**.

Specify the audit locations

During the planning phase, audit planners specify the locations where the audit will be conducted.

1. Navigate to the required folder and open the audit object.
2. In **Locations** section, click **Add to** .
3. In the **Add** panel, from the **Type** list, select the required location.
4. In **Properties**, specify name and other properties as required.
5. Click **Add**.


Specify the planning properties for the quality audit

If you follow a specific process to conduct your quality audit, you can specify this process in Teamcenter.

Example:

You are performing a quality audit on the door of a car during the first shift. In Teamcenter, you can enter detailed information about the audit, including the **Process**, **Sub-Process**, production **Line**, the specific variant of the vehicle, and the **Shift**. These detailed records help accurately track the audit activities and improve the effectiveness of the quality audit process. They also help in implementing targeted improvements.

Procedure

1. Open the required quality audit.
2. Choose **More Commands** **...** > **Edit**  > **Start Edit**.
3. In the **Additional Planning Properties** section, select the required option from the **Process** list.

Note:

If the process your industry follows is not listed, you can manually enter the name of the process.

4. Select the required option from the **Sub-Process** list.

Note:

- The **Sub-Process** options are dependent on the **Process** options.
- If you have entered a custom name for the process, you must also enter the sub-process name manually.

5. In the **Line** field, specify the production or assembly line for the quality audit process.
6. In the **Shift** field, specify the shift of the day when you want to conduct the quality audit process.
7. Click **Save**.

Create a follow-up audit

A *follow-up audit* is an audit that has properties similar to its original audit or a predecessor audit. It helps to create frequently scheduled audits that are similar to their predecessor audits with less effort. An audit administrator or an audit planner creates the follow-up audits.

Procedure

1. Navigate to the required folder and select the audit for which you want to create a follow-up audit.
2. Choose **More Commands** **...** > click **New** **✦** > **Save As**.
3. In the **Save As** panel, specify the required properties.
4. Select the **Create Follow-up Audit** check box.

Note:

The data in the **Findings** tab is not copied in the follow-up audit as the findings for each audit are different.

5. Click **Save As**.

The follow-up audit is created and added as a **Successor** audit.

In the **Overview** tab, under **DEPENDENCIES**, you can view the name for the follow-up audit.

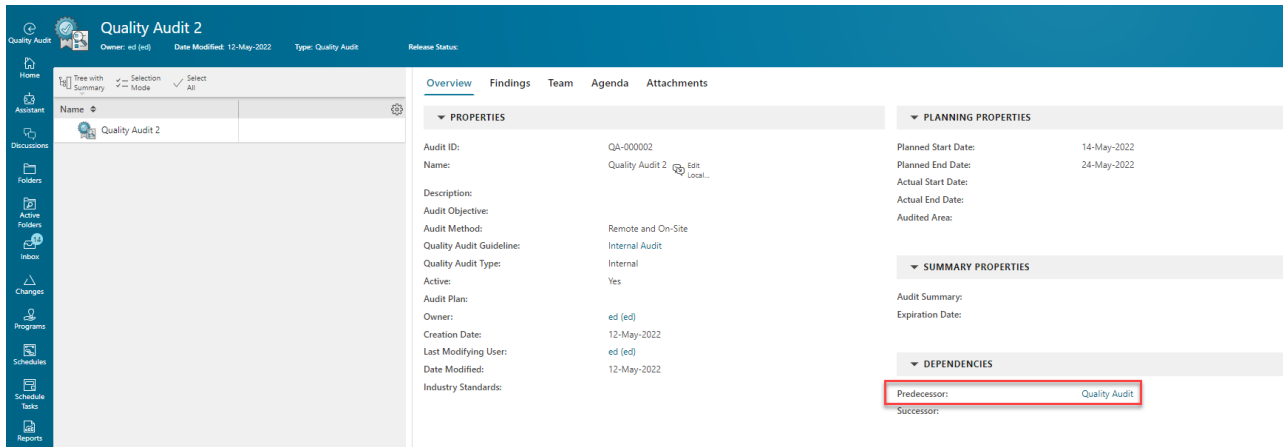
The screenshot displays the 'Quality Audit' application window. The main content area is divided into three sections: PROPERTIES, PLANNING PROPERTIES, and SUMMARY PROPERTIES. The DEPENDENCIES section is highlighted with a red box and contains the following information:

DEPENDENCIES	
Predecessor:	
Successor:	Quality Audit 2

The PROPERTIES section on the left lists the following details for the audit:

Audit ID:	QA-000001
Name:	Quality Audit <small>Edit Local...</small>
Description:	
Audit Objective:	
Audit Method:	Remote and On-Site
Quality Audit Guideline:	Internal Audit
Quality Audit Type:	Internal
Active:	Yes
Audit Plan:	
Owner:	ed (ed)
Creation Date:	09-May-2022
Last Modifying User:	ed (ed)
Date Modified:	12-May-2022
Industry Standards:	

Also, the original audit is added as the **Predecessor** audit.



Create an audit template

As an audit planner, you can create an audit template for the auditors. Audit templates are helpful when performing the same type of audits regularly.

Procedure

1. On the **Home** page, click **EXPLORER**.
2. In **CONTENTS**, click **Add to** ⊕.
3. For the **Type** list, choose **Quality Audit**.
4. Specify the required properties.
5. Select the **Template** check box.
6. Click **Add**.

The audit template is created.

You can **create another audit template from this audit template**, **edit the audit template**, and **create an audit from the audit template**. You can also **schedule the audit template** to reuse the audit with the same checklists and data.

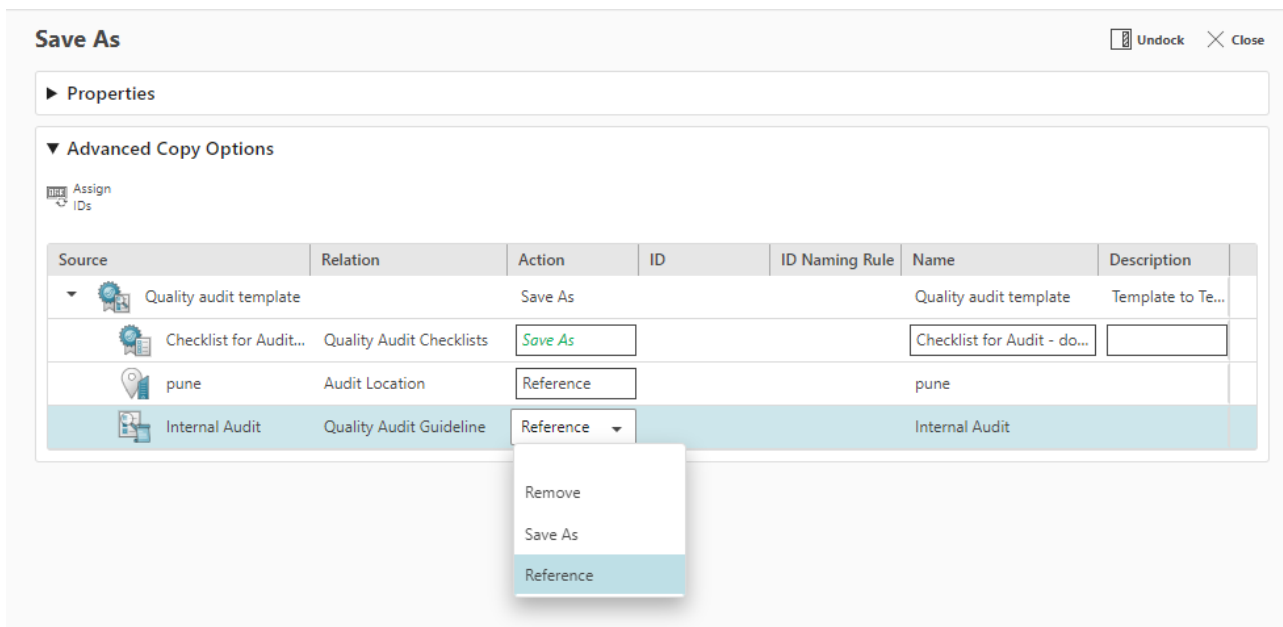
In the **Where Used** tab of the audit template, you can verify which audits are based on this specific template.

Create a new audit template from an existing audit template

As an audit planner, you can save an existing audit template to create a new audit template. The new audit template retains the properties of the existing audit template, such as copying the checklist structure while resetting the rating values.

Procedure

1. Open the audit template that the new audit template must be based on.
2. Choose **More Commands** **...** > **New** ✨ > **Save As** 📄.
3. In the **Save As** panel, specify the required properties.
4. Specify the required properties in **Advanced Copy Options** or retain the default values.



The available actions under **Advanced Copy Options** are as follows:

Actions	Description
Remove	Removes the property in the new audit template.
Save As	Saves the same properties with reset values in the new audit template.
Reference	Carries over the properties to the new audit template.

5. Click **Save As**.

The new audit template is created and saved.

Create an audit from an audit template

As an audit planner, you can create an audit based on an audit template.

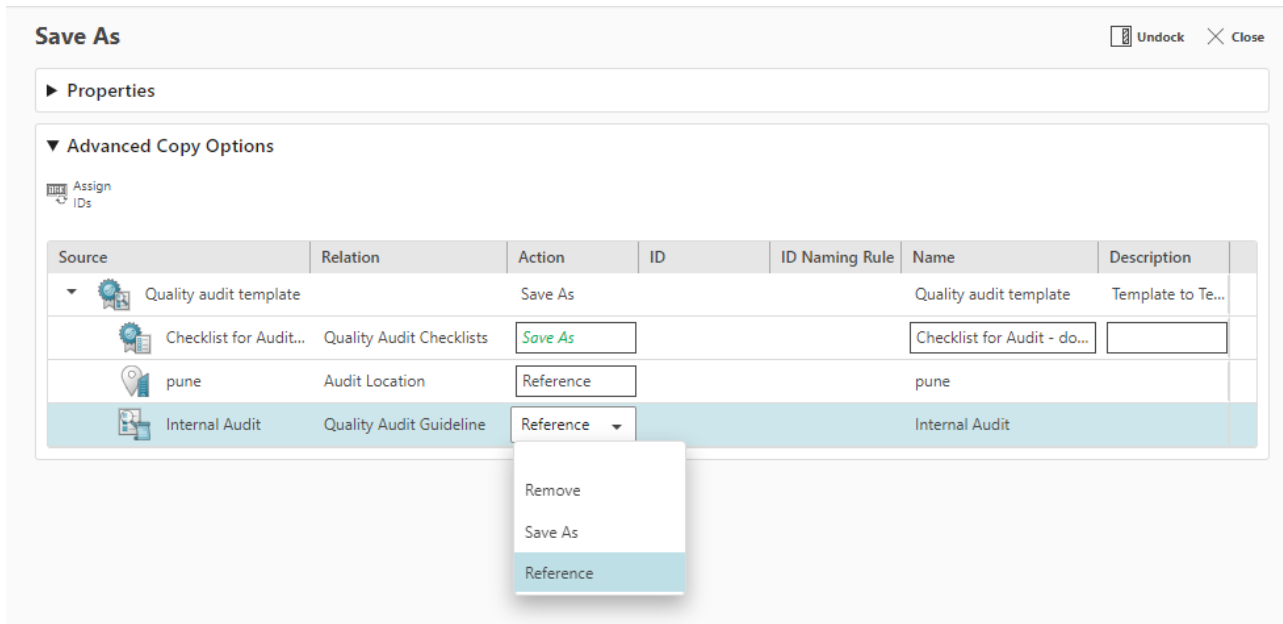
The properties of the audit created are similar to the **audit properties**.

Example:

A company in the semiconductor and high-tech electronics industry, conducts 5S audits daily, focusing on evaluating cleanliness within the manufacturing facility by inspecting workstations, production areas, and storage spaces. Creating an audit daily for this evaluation poses a challenge and results in inconsistent assessment. The audit planner creates an audit from an audit template to streamline the evaluation process. The created audit template provides a predefined checklist and autofilled entries for the required properties. The audit planner also **schedule the audit template** to reuse the audit multiple times.

Procedure

1. Open the audit template from which you want to create a new audit.
2. Choose **More Commands** **...** > **New** **✦** > **Create Audit from Template**.
3. In the **Save As** panel, specify the required properties.
4. Specify the required properties in **Advanced Copy Options**, or retain the default values.



The available actions under **Advanced Copy Options** are as follows:

Actions	Description
Remove	Removes the property in the new audit.
Save As	Saves the same properties with reset values in the new audit.
Reference	Carries over the properties to the new audit.

- Click **Save As**.


Create an audit from an existing audit

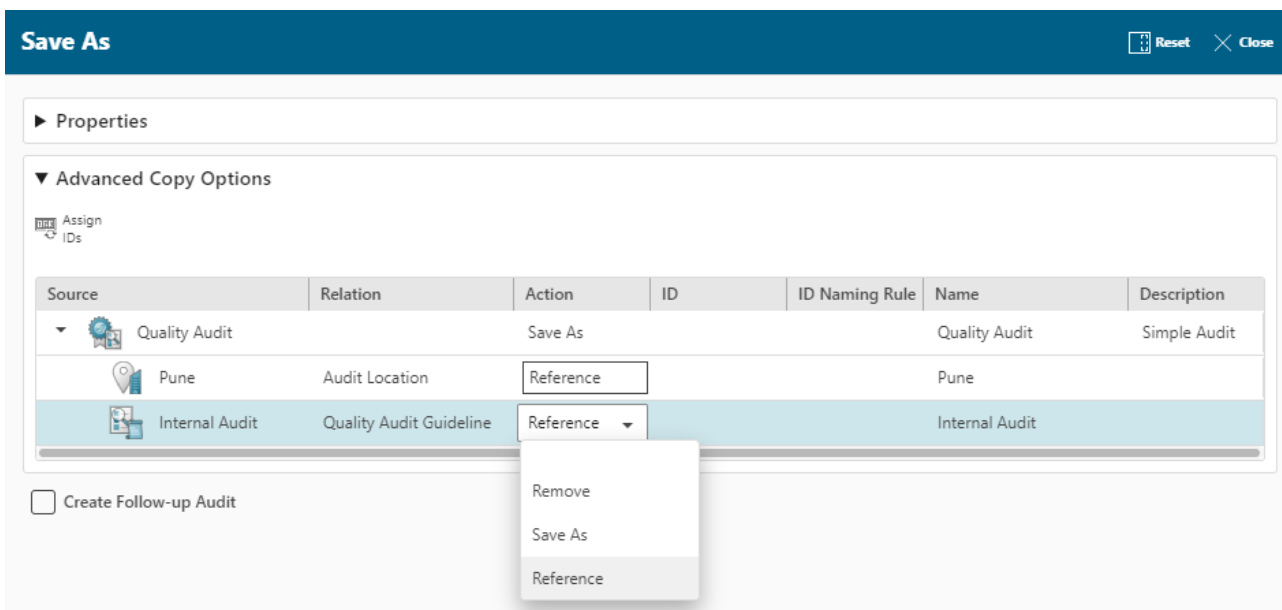
As an audit planner, you can create an audit based on an existing audit.

Note:

The checklist is not copied when a new audit is created from an audit.

Procedure

- Open the audit that you want to use as a reference to create a new audit.
- Choose **More Commands** \dots > **New** \star > **Save As** .
- In the **Save As** panel, specify the required properties.
- Specify the required properties in **Advanced Copy Options** or retain the default values.



The screenshot shows the 'Save As' dialog box with the following table of properties:

Source	Relation	Action	ID	ID Naming Rule	Name	Description
Quality Audit		Save As			Quality Audit	Simple Audit
Pune	Audit Location	Reference			Pune	
Internal Audit	Quality Audit Guideline	Reference			Internal Audit	

Below the table, there is a checkbox labeled 'Create Follow-up Audit' which is currently unchecked.

The available actions under **Advanced Copy Options** are:

Actions	Description
Remove	Removes the property in the new audit.
Save As	Saves the same properties with reset values in the new audit.
Reference	Refers the properties as it is in the new audit


- If you want to **create a follow-up audit**, select **Create Follow-up Audit**.
- Click **Save As**.

The new audit is created and saved.

Edit an audit template

As an audit planner, you can edit audit template.

Procedure

- Open the required audit template.
- Click **Edit** .
- Edit the required properties.
- Click **Save**.

Specify the recurrence schedule for an audit template

As an audit planner, you can set up a recurring schedule, such as monthly, weekly, daily, or hourly, to automate the generation of questionnaires as required.

Procedure

- Open the audit template for which you want to specify the recurrence schedule.
- Click **Edit > Schedule** tab.
- For the **Recurrence Type** list, choose **Fixed Interval**.
- Click **Save**.

Note:

If you do not see the schedule properties, click **Attachments** tab > click **Schedule** tab.

- Click **Edit** again and modify the required properties.

The screenshot shows the 'Quality audit template' configuration page. The 'Schedule' tab is active. The 'Recurrence Type' is set to 'Fixed Interval'. The 'Time Scale', 'Time Interval', and 'Audit Time' fields are highlighted with a red box. The 'Audit Time' field shows a date picker and a time picker.

The available actions for related properties are as follows:

Options	Description
Time Scale	Specifies the recurrence duration of the audit template schedule, such as monthly, weekly, hourly, or daily.
Time Interval	Specifies the time span in days, hours, weeks, or months within which the next audit template should be generated.
Audit Time	Specifies the exact date and time when the audit template must be generated.

- Click **Save**.

The audit template is scheduled as per the specified time frame.

Note:

In case, you do not see your audit template at the scheduled time, contact your administrator. Your administrator will grant access to you to modify and schedule audit templates.

Create a qualification profile for a user

The lead auditor and co-auditor are users trained on a given industry standard and are qualified to lead or co-lead an audit related to this industry standard. In Teamcenter, *qualification profiles* are created for these lead auditors and co-auditors, and they are then assigned a qualification unit associated with a specific industry standard to lead and co-lead the audit related to this industry standard.

Prerequisites

- To create a qualification profile for a user, you must have Training and Qualification installed.
- The following tasks must be done in the Training and Qualification:
 - Create a qualification unit.
 - Release the qualification unit created.
 - Create a qualification profile.
 - Assign target entities to the created qualification profile.
 - Assign the qualification unit to a qualification profile.

Procedure

1. **Create an audit** with the industry standards matching the standards specified in the created qualification unit.
2. Specify the audit team.

When specifying the audit team, you can view a list of qualified users who can be added as lead auditors and co-auditors.

Specify the audit team

During the planning phase, audit planners specify the team members who will participate in the audit. Depending on their role, the participants are included in various groups such as moderators, lead auditors, team leaders, and champions.

You can **create the quality audit guidelines** to specify the various roles that are required while creating an audit.

You can also specify audit roles such as auditee, lead auditor, and co-auditor. For adding a lead auditor and a co-auditor, the user can be set as a qualified user. To set an user as a qualified user, you can **create**

profiles for such qualified user and add the users in the respective sections. Training and Qualification is required to add the qualified users.

1. To add the members for the audit, follow the steps below:
 - a. Navigate to the required folder and open the audit object.
 - b. Click the **Team** tab, and in the **Members** section, click **Add** ⊕.
 - c. In the **Add** panel, select the required options from the **Group** and **Role** lists.
 - d. Select the required members from the search results and click **Add**.
2. To add the users as an auditee, select the users in the **Auditee** section as follows:
 - a. Click **Add** ⊕.
 - b. In the **Add** panel, search for the name of the member in the **Required** field, select the required member from the search list, and click **Add**.
3. To add the qualified users for audit, select the users in **Lead Auditor** section and **Co-Auditor** section as follows:
 - a. Click **Add** ⊕.
 - b. In the **Add** panel, in the **Required** field, type asterisk (*) and select the required qualified users.
 - c. Click **Add**.

Note:

- You can add the lead auditor and the co-auditor even if Training and Qualification is not installed.
- You can also add co-auditor's that are not qualified. For this, your administrator must set the preference to add the for co-auditor's qualification.

Specify vendors associated with the audit

As an audit manager, you can specify any vendors that are associated with a quality audit.

Prerequisites

While creating the quality audit guideline object, audit administrators must select the **Has Vendors** check box that enables users to specify any vendors associated with the quality audit that references the quality audit guideline object.

Procedure

1. Navigate to the required folder and open the audit object.
2. In the **VENDORS** section, to associate the vendor for the audit, click **Add to** ⊕.
3. In the **Add** panel, search for and select the required vendor, and click **Add**.

To remove a vendor, select the vendor and click **Remove**.

Note:

If you remove a vendor, the associated brands, partner contracts, contacts, and locations are also removed.

Add a checklist to the audit

Checklists contain the questionnaires that are used during the execution phase of the audit.

Note:

Based on the standards, you **creates checklists in the Quality Master Data library**.

1. Open the audit object.
2. Choose **More Commands** ⋮ > click **New** ✨ > **Add Quality Checklist**.
3. In the **Add Quality Checklist** panel, from the **Checklist Type** list, select the required type of checklist, and select the required checklist from the search results.
4. Click **Add**.

Specify the audit agenda

During the audit planning phase, the audit planners define the audit agenda. This helps the audit participants to plan their schedule and availability accordingly.

1. Navigate to the required folder and open the audit object.

2. Click the **Agenda** tab, and click **Add** ⊕.
3. In **Properties**, specify the required options.
4. Click **Add**.

Release or reject the quality audit

Once the quality audit is submitted for review through a workflow, the lead auditor reviews the audit and releases it or rejects it.

1. Open the required quality audit and review the audit properties and other details.
2. Click the **Workflow** tab.
3. In the **Task to Perform** section, enter your comments in the **Comments** box.
4. Do one of the following:
 - To release the audit to the next step, click **Ready for release**.

The audit object is then moved to the next step of the workflow, which is the **Audit Review** step, where the auditor specifies the workflow signoff team.

OR

- To reject the audit plan, click **Reject**.

The audit is sent back to the draft step.

Specify the audit reviewers

The audit planner specifies the audit participants who will be responsible to perform the signoffs at the various steps of the audit workflow.

Note:

The **audit must be release** to specify the audit reviewers.

1. Open the audit object.
2. Click the **Workflow** tab.
3. In **Reviewers** section, click **Add** ⊕.

4. In the **Add** panel, select the required groups and roles for the signoff team, and click **Add**.
5. In **Minimum Participation** section, specify the required percentage.
6. Select the **Require full participation** check box, and enter your comments.
7. Click **Complete**.

The participants receive a signoff task in their inbox.

Once the participants approve the task, the audit plan moves to the **Execute Audit** step.

Approve the quality audit

After the quality audit is released, and the signoff team is specified, all participants receive a signoff task in their inbox. The participants then approve or reject the audit.

1. Open the quality audit and review it.

OR

Open the task from your inbox, navigate to the audit object, and review it.

2. Click the **Workflow** tab.
3. In **TASK TO PERFORM**, enter your comments.
4. Do one of the following:

- To approve the audit and send it to the execution step, click **Approve**.

The audit object is then moved to the next step of the workflow, which is the **Execute Audit** step, where the auditor conducts interviews with the audit participants.

OR

- To reject the audit plan, click **Reject**.

The audit is canceled or sent back to the draft step.

Create the audit checklist master data

Checklists contain the questionnaires that are used during the execution phase of the audit. Based on the standards, during the audit planning phase, the audit planner creates these checklists in the **Quality Master Data** library and links these checklists to the audit object.

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab.
3. Click **New** ✱ > **Add**.
4. In the **Add** panel, specify a value for the **Checklist ID**, and enter a **Name** for the checklist.
You can optionally add a description and a number if required.
5. From the **Checklist Type**, select the **Checklist**.
6. Specify the checklist number if required.
7. In the **SETTINGS** section, select the **Assessment Required** and **Mandatory** check boxes if required.
8. Click **Add** to create the checklist in the **Quality Master Data** library.
9. To add a **Checklist, Chapter, Question, or Sub-Question** to the checklist, do the following:
 - a. Select the checklist specification and in the primary toolbar, click **New** ✱ > **Add**.
 - b. In the **Add** panel, specify the **Checklist ID** and **Name**.
 - c. From the **Checklist Type** list, select **Chapter, Question, or Sub-Question**.
In the tree view, you can also drag and drop checklists, chapters, questions, or sub-question from one element to other.
 - d. Specify a number if required.
 - e. In the **SETTINGS** section, select the **Assessment Required** and **Mandatory** check boxes if required.
 - f. Click **Add**.

The **Checklist, Chapter, Question, or Sub-Question** is included in the checklist.




What are quality audit guidelines?

During the audit planning phase, auditors or audit planners plan many audits with different standards required. To create each audit with a minimum effort, audit administrators can define several default parameters that are applicable for multiple audits within the *quality audit guidelines*. For example, audit administrators can define the finding types for a specific type of audit object.

As an audit administrator, you can **create quality audit guidelines** that specify options for the audit team group, the audit norms (i.e. Industry Standards) available when users select the audit team, and the Industry Standards while auditors or audit planners are creating a specific type of audit object.

Create the quality audit guideline

As an audit administrator, you can create quality audit guidelines to specify the options for audit team groups and audit norms available for users. For example, you can create a quality audit guideline object to specify the default audit team group, the associated vendors, and the audit norms while creating an internal audit object.

1. On the **Home** page, click **EXPLORER**.
2. In the **Contents** section, click **Add to** .
3. In the **Add** panel, and select **Quality Audit Guideline**.
4. In the **Quality Audit Type** list, select the type of audit for which you are creating the guideline.
5. Enter a name and description for the guideline.
6. Click **Add**.
7. Open the quality audit guideline you created.
8. Choose **More Commands**  > **Edit**  > **Start Edit**.
9. In the **Audit Team Group** list, select the required group.

The audit team group that you select is the default group that is available when users specify the audit team while creating the audit object.

10. Select the **Has Vendor** check box to specify any vendors associated with the quality audit.
11. Select the required standards from the **Industry Standards** list. You can specify multiple **Industry Standards**.

The **Industry Standards** that you specify in the quality audit guideline object are available to users. They see them as options when specifying the industry standards while creating the audit object.

12. Choose **More Commands**  > **Edit**  > **Save Edits**.


Assign a workflow to a quality audit guideline

As an audit administrator, you can assign the workflow to a quality audit guideline.

Prerequisites

You must **create a quality audit guideline** to assign a workflow to it.

Procedure

1. Open the required quality audit guideline.
2. Choose **More Commands** **...** > click **Manage**  > **Assign QA Workflow**.
3. In the **Assign** panel, select the required workflow and click **Assign**.

The workflow is assigned to the quality audit guideline. When this quality audit guideline is added to the quality audit, the user can track the quality audit process.


What are finding guidelines?

Audit *finding guidelines* specify the rules for creating actions for the findings available when users are creating a specific type of audit object. With the combination of quality audit guidelines and finding guidelines, administrators can define the appropriate finding types required for a specific audit object.

As an audit administrator, you can **create the finding guidelines** to specify the rules for creating actions for the findings and the audit norms available for users.

Create the finding guideline

Audit administrators can create finding guidelines to specify the rules for creating actions for the findings and the audit norms available for users. For example, audit administrators can create a finding guideline specifying that the creation of audit findings is optional for specific audit norms and quality audit guideline objects.

1. On the **Home** page, click **EXPLORER**.
2. In the **Contents** section, click **Add to** .
3. In the **Add** panel, select **Finding Guideline**.
4. Specify the **Name** for the finding guideline.
5. In the **Action Creation Required** list, select the options for creating actions for the findings.
6. From the **Audit Guidelines** list, select the required quality audit guidelines.

Note:

- You can select multiple quality audit guidelines.
- The rules for creation of actions are applicable to the selected quality audit guidelines.

7. In the **Industry Standards** list, select the required options.

Note:

- You can specify multiple **Industry Standards**
- The **Industry Standards** that you specify in the finding guideline object are available as options when users specify the industry standards while creating the audit object.

8. Click **Add**.

6. Execute an audit

Executing an audit

During execution of the audit, the lead auditor conducts interviews with the audit participants. The checklist linked to the audit is assessed and updated accordingly. The lead auditor can **create quality issues to record global findings that have no relation to a question** in the checklist of an audit.

Example:

Consider a scenario where there are issues in the production line of the steering wheel assembly of car. The problem occurs for a few weeks, and isolated incidents are resolved, but the issues keep occurring. Realizing that the issues could be related to oversight in processes, the company decides to conduct an ad-hoc internal audit to inspect all the steps in the steering wheel production process.

After the initial planning is done by the audit planner, the lead auditor conducts interviews with the shop floor personnel, the supervisor, and the management representatives. The lead auditor also edits the checklists to record the answers to the questions and creates quality issues to record the audit findings.

View and track your audits in the calendar

As a business user, you can use the calendar to view and track the audits you create with specified due dates. You can track your audits in a daily, weekly, or monthly view of the calendar.

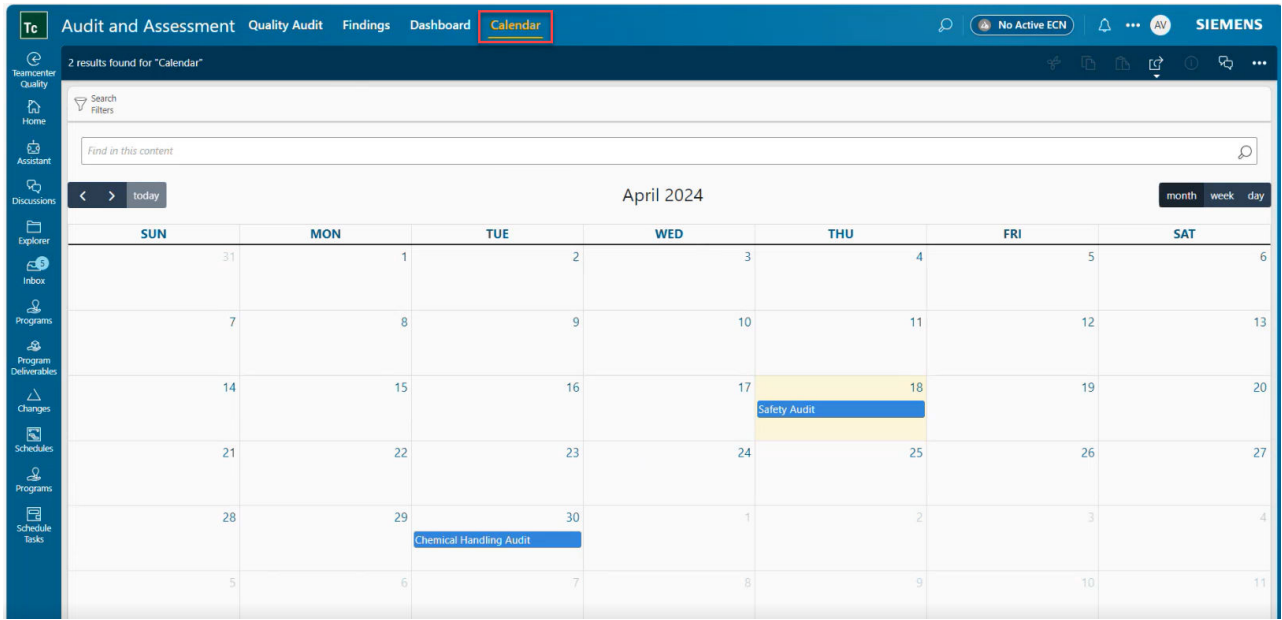
Prerequisites

- You must create an audit and specify the **Planned End Date** for that audit.
- 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 **AUDIT AND ASSESSMENT** tile.
4. Click the **Calendar** tab.

The calendar displays all the audits created by you.



Approve or reject the audit

Once all the audit participants approve the signoff tasks, the audit moves to the **Execute Audit** step, where the lead auditor executes the audit.

1. Open the audit object and review it.
2. Click the **Workflow** tab.
3. In the **TASK TO PERFORM** section, enter your comments.
4. Do one of the following:
 - To approve the audit and execute it, click **Approve**.

The lead auditors receive a task in their inbox. They execute the audit by conducting interviews with the audit participants and recording their answers and audit findings. After executing the audit, the lead auditors mark the task as completed.


OR

- To reject the audit execution, click **Reject**.

The audit is canceled or sent back to the draft step.

Update the checklist questions with answers

The lead auditor conducts interviews with the audit participants. The checklists linked to the audit are edited and updated to record the answers to the questions.

1. Navigate to the audit object and open it.
2. Select the checklist that you want to assess.
3. Select the question that you want to update.
4. Click **Edit** .
5. In **Overview** tab, from the **Answer** list, select the required option.

Based on the answers, the red, yellow, green (RYG) rating that indicates the status of the various questions in the checklist is updated. For example, based on the default rules, if the mandatory question is answered with a *no*, the RYG object automatically becomes red. Further, if there is a quality action associated with it, it becomes yellow. Similarly, if the answer is a *yes*, it becomes green.

The RYG ratings of the questions are rolled over to the checklist to indicate the status of the checklist. For example, if a checklist has five questions, and all the four questions are answered with a *yes* (green) and one is answered as *no* (red), the RYG object of the checklist becomes red based on the default rules. Similarly, if all the four questions are green, and one has a quality action associated with it (yellow color), the RYG object of the checklist becomes yellow.

For more information, see *Understanding RYG ratings in a quality checklist* in *Quality Project Management* of the Teamcenter documentation.

6. From the **State** list, select an option to specify the status of the question.
7. Click **Save**.

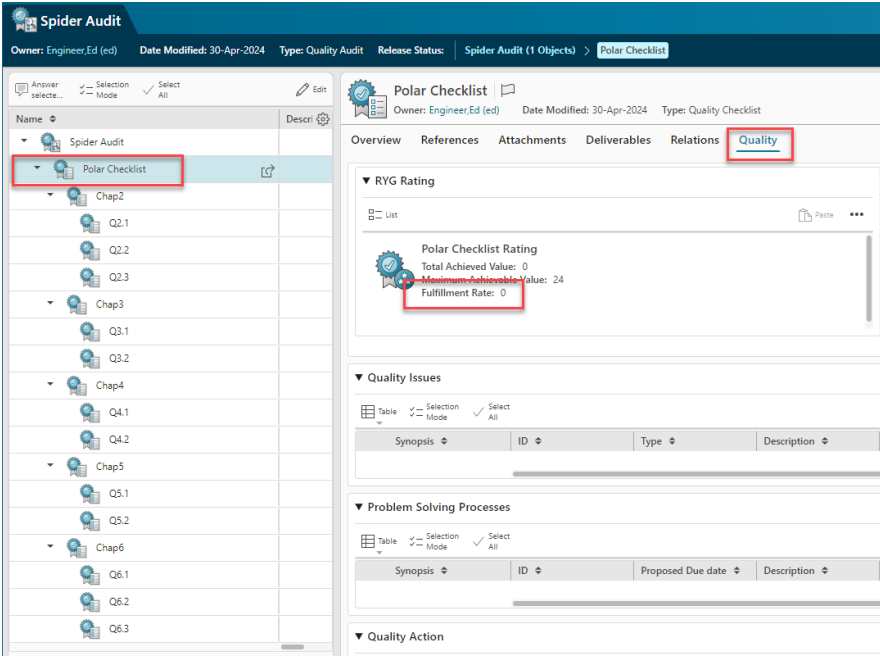
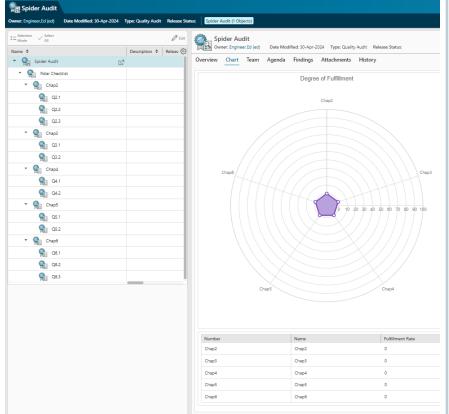
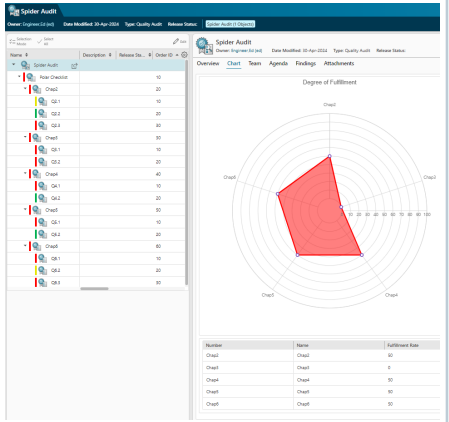
Fulfillment rate of quality audit checklists in a spider chart

The *fulfillment rate* is a metric that indicates the completion percentage of a given set of tasks or questions within a quality checklist in the audit. This fulfillment rate determines the color of a spider chart.

Consider a scenario in a quality audit, where you have attached a checklist with a rating rule. In the rating rule, you specify the threshold value using *fulfillment* as the unit: 50 for red, 70 for yellow, and 100 for green. The color of the generated spider chart then shows the color based on the fulfillment rate range, that is, red for a value from 0 to 50, yellow for 50 to 70, and green for 70 to 100.

The spider chart is displayed based on the fulfillment rate of the provided answers and includes a fulfillment rate table only for the first level child of the checklist. The spider chart is plotted based on the values from the **Number** column and the **Fulfillment rate** column.

The following table lists the value of the fulfillment rate and the corresponding spider chart.

Fulfillment rate of the checklist	Spider chart color
<p>The checklist has no answers, indicating no fulfillment rate value for the header checklist or a zero fulfillment rate.</p> 	<p>The spider chart is purple in color.</p> 
<p>The fulfillment rate for the checklist is 50, which falls within the range of 0 to 50.</p>	<p>The spider chart is red in color.</p> 

Fulfillment rate of the checklist

Spider chart color

The screenshot shows the 'Spider Audit' interface for a 'Polar Checklist'. The left sidebar lists various checklist items (Chap2, Q2.1, Q2.2, Q2.3, Chap3, Q3.1, Q3.2, Chap4, Q4.1, Q4.2, Chap5, Q5.1, Q5.2, Chap6, Q6.1, Q6.2, Q6.3). The main content area shows the 'Quality' tab with an 'RYG Rating' section. The rating is 'Red' with a fulfillment rate of 54.17. The 'Total Achieved Value' is 12 and the 'Maximum Achievable Value' is 24. Below this are sections for 'Quality Issues' and 'Problem Solving Processes'.

The fulfillment rate for the checklist is 54.17, which falls within the range of 50 to 70.

The spider chart is yellow in color.

This screenshot is similar to the first one but shows a different checklist item. The 'RYG Rating' section now shows a 'Yellow' rating with a fulfillment rate of 70.83. The 'Total Achieved Value' is 13 and the 'Maximum Achievable Value' is 24. The rest of the interface, including the sidebar and other sections, remains the same.

The fulfillment rate for the checklist is 70.83, which falls within the range of 70 to 100.

This screenshot shows the 'Spider Audit' interface with a spider chart. The chart is a circular radar chart with multiple axes. The area under the chart is filled with a yellow color. Below the chart is a table with columns for 'Name' and 'Achieved Val.'. The table contains several rows of data.

The spider chart is green in color.

Fulfillment rate of the checklist

Spider Audit
Owner: Engineer,Ed (ed) Date Modified: 30-Apr-2024 Type: Quality Audit Release Status: Spider Audit (1 Objects) Polar Checklist

Polar Checklist
Owner: Engineer,Ed (ed) Date Modified: 30-Apr-2024 Type: Quality Checklist

Overview References Attachments Deliverables Relations **Quality**

RYG Rating

Polar Checklist Rating
Green
Total Achieved Value: 17
Maximum Achievable Value: 24
Fulfillment Rate: 70.83

Quality Issues

Synopsis	ID	Type	Description

Problem Solving Processes

Synopsis	ID	Proposed Due date	Description

Quality Action

Spider chart color

Spider Audit
Owner: Engineer,Ed (ed) Date Modified: 30-Apr-2024 Type: Quality Audit Release Status: Spider Audit (1 Objects) Polar Checklist

Overview **Chart** Team Agents Findings Attachments

Degree of Fulfillment

Number	Name	Fulfillment Rate
Chart	Chart	60.889171523398
Chart	Chart	0
Chart	Chart	0
Chart	Chart	0
Chart	Chart	100
Chart	Chart	0

View the status of audit checklist in a spider chart

You can view a spider chart to examine the checklist status.

The chart is decided based on the fulfillment rate of the checklist, which is attached to the audit. The color of the spider chart reflects the RYG (red, yellow, green) ratings of the header checklist.

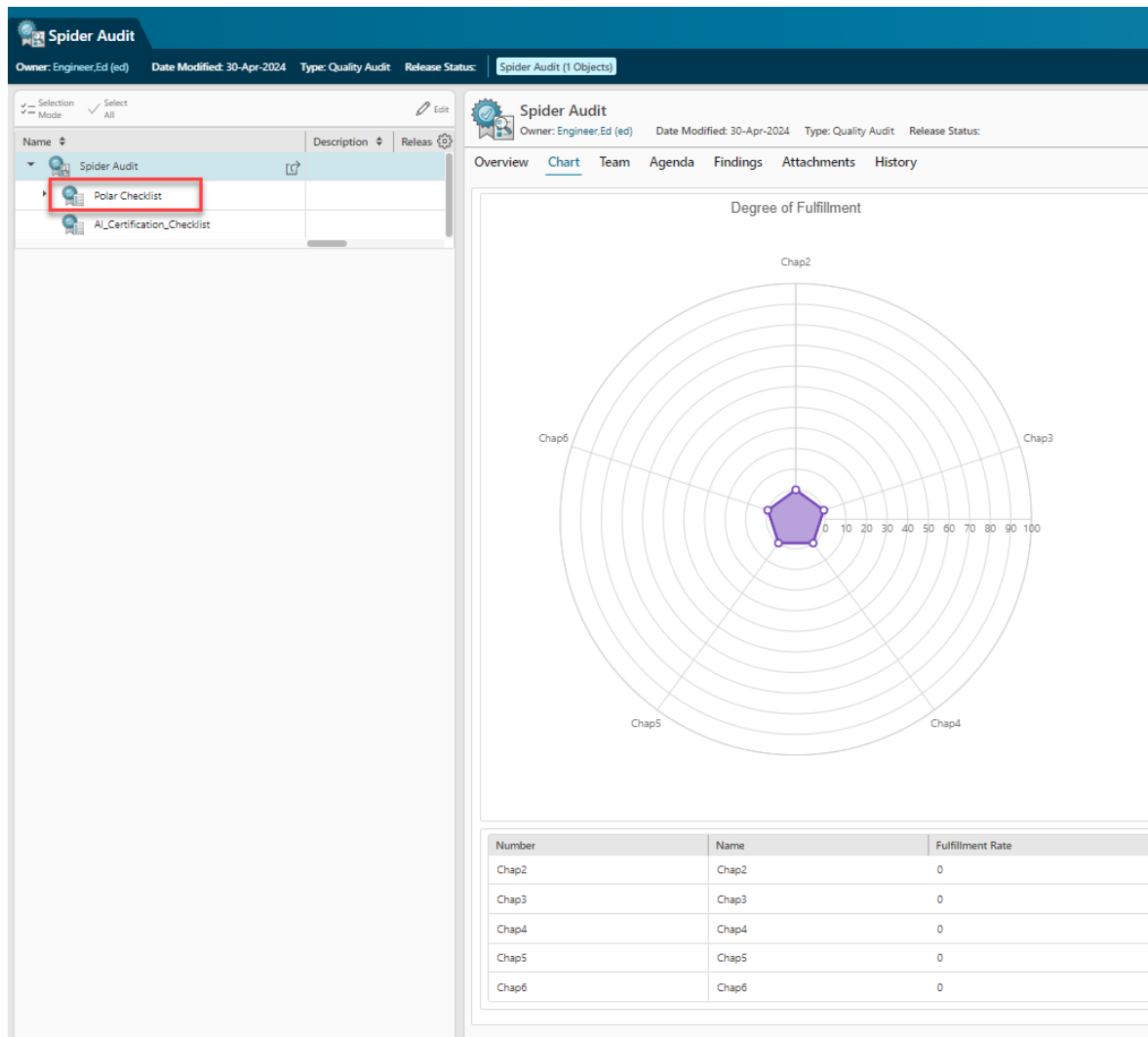
Procedure

1. Open the audit that contains the checklist.
2. Click the **Chart** tab.

The spider chart displays the status of the quality audit checklist.

Note:

- If you have more than one checklist in the audit, the spider chart is displayed for the first checklist in the hierarchy.



- The chart is shown only based on the fulfillment rate of the first-level child in the hierarchy.

The screenshot displays the Spider Audit interface. On the left, a tree view shows the audit structure under 'Spider Audit', including 'Polar Checklist', 'Chap2', 'Chap3', 'Chap4', 'Chap5', and 'Chap6', each with sub-items (e.g., Q2.1, Q2.2, etc.). 'Chap2' is highlighted with a red box. On the right, the 'Degree of Fulfillment' chart is a radar chart with six axes labeled 'Chap2' through 'Chap6'. The chart shows a purple pentagon at the center, indicating a fulfillment rate of 0 for all chapters. Below the chart is a table with the following data:

Number	Name	Fulfillment Rate
Chap2	Chap2	0
Chap3	Chap3	0
Chap4	Chap4	0
Chap5	Chap5	0
Chap6	Chap6	0

Create findings for an audit

During the audit review and summary phase, the lead auditor creates audit findings for the audit.

1. Open the quality audit object and click the **Findings** tab.
2. In the **Findings** tab, click **Create Finding** ⊕.
3. In the **Create Change** panel, enter the required options.
4. Click the **Participants** tab and specify the required options.
5. Click **Create**.

6. In the **Findings** tab, select the required findings and in the **Finding Guideline** column, select the required guideline from the list.

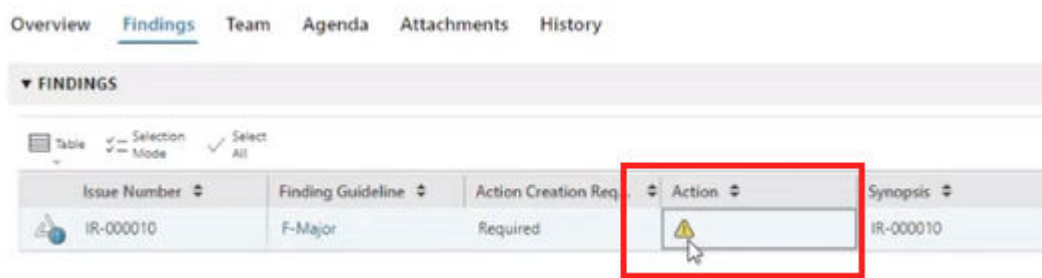
Note:

- You must **create the finding guidelines**.
- The options available in the list are filtered based on the industry standards specified for the audit and the finding guidelines. For example, if you specify the industry standard for the audit as **ISO 9001**, then only those finding guidelines that have **ISO 9001** included as their industry standard are available for selection.

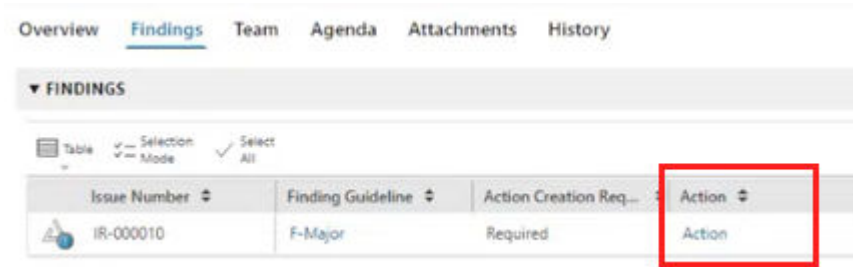
The options in the finding guideline is directly mapped to the rating of the question. The following table lists the default finding guidelines.

Option	Description
B – Best Practice	No action is required, and the rating of the associated question is set to the maximum value of 10 points.
F – Major deviation	Creating an action is mandatory, and the rating of the associated question the assessment is set to the minimum value of 0 points.
F – Minor deviation	Creating an action is optional, and the assessment is set to a mid-value of 5 points.
I – Improvement	Creating an action is optional.
O – Observation	Creating an action is mandatory.

For mandatory actions, the **Action** column shows an icon to indicate that an action must be created for the finding.



The icon is not shown when you create an action for the finding.



Assign a question to an audit finding

During the audit review and summary phase, to record global findings and best practices, the lead auditor may create findings without the context of a question. You can assign a question to such findings.

Procedure

1. Open the required audit.
2. In the **Findings** tab, in the **Findings** section, select the finding to which you want to assign a question.
3. Click **Assign Question** ⊕.
4. In the **Assign Question** panel, select the required question from the list.
5. Click **Assign**.

The question is displayed in the **Question** column.

Assign a checklist to a vendor

You can assign a checklist to a vendor and view all the issues that are assigned to a vendor.

Procedure

1. Open the vendor and click the **Quality Management** tab.
2. In the **ASSESSMENT CHECKLIST** section, click **Add Quality Checklist** ⊕.

The Quality Manager must create the checklists for you in the Quality Master Data library.

3. In the **Add Quality Checklist** panel, search for and select the required checklist.
4. Specify a state, comment, and responsible user as appropriate.

5. Click **Add**.

The **Quality Management** tab displays a list of all the issues and checklists that are assigned to the vendor.

To delete a checklist, select it and click **Delete**, and in the confirmation message, click **Delete**.

Complete the audit execution task

Once the audit is in the execute stage, the lead auditor receives a task in the inbox. After completing the audit, the lead auditor marks the audit execution task as complete or rejects the task.

1. Open the task from your inbox, navigate to the audit object, and review it.
2. In **ACTIONS**, enter your comments.
3. Do one of the following:
 - If the audit execution work is complete, click **Finished**.

The audit object is then moved to the next step of the workflow, which is the **Close Audit** step, where the auditor planner reviews the audit summary and closes the audit.

- To reject the task, click **Reject**.

The audit is canceled or sent back to the draft step.

7. Review the audit

Review the audit and create the summary report

During the audit review and summary phase, the lead auditor reviews the audit results, including the audit findings, together with the team. Optionally, audit actions to address the audit findings can be initiated during the audit review, or later individually in the follow-up phase by the audit team.

Example:


Consider a scenario where there are issues in the production line of the steering wheel assembly of car. The problem occurs for a few weeks, and isolated incidents are resolved, but the issues keep occurring. Realizing that the issues could be related to oversight in processes, the company decides to conduct an ad-hoc internal audit to inspect all the steps in the steering wheel production process.

After the audit planning and execution, the lead auditor prepares an audit summary and grades the audit based on the severity of the findings. Once the questions are assessed, the lead auditor creates quality issues to report the audit findings and optionally assigns them to the responsible users, the users who are designated for taking the required actions. The lead auditor then discusses the audit findings with the team and prepares the audit report and summary.

Review the audit results with the team

The lead auditor reviews the audit results and findings with the audit team such as the audit planner and moderator. They discuss the audit questions and the answers and define the priority of the audit findings or reject certain findings.


Update the checklist questions based on the audit team's review

1. Navigate to the audit object and open it.
2. Select the checklist that you want to assess.
3. Select the question that you want to update.
4. Click **Edit** .
5. Form the **State** list, select the required option.

This indicates the updated status of the risks or issues that are identified during the review of the audit results and findings.

6. Click **Save**.

Specify the audit review and summary


1. Open the audit object and click the **Overview** tab.
2. Choose **More Commands** **...** > click **Edit**  > **Summary**.
3. In the **Summary Properties** section, enter the **Audit Summary**.
4. Set the **Expiration Date** of the audit.

Based on the severity of the findings, the lead auditor grades the audit and sets the audit expiration date.

5. Choose **More Commands** **...** > click **Edit**  > **Save Edits** to save your changes.

You can also **generate a report of the audit summary** if required.

Generate a report of the audit summary

1. Navigate to the audit object and open it.
2. Choose **More Commands** **...** > **New**  > **Generate Report**.
3. In the **Generate Report** panel, select **Quality Audit - Overview**.
4. Specify the required properties.
5. Click **Generate**.

8. Follow up on the audit findings

Following up on audit findings

After the audit execution, the lead auditor reports the audit findings. During the audit follow-up phase, the team defines the actions identified to address the issue. These are created as quality actions and assigned to respective owners. The users respond to the quality actions assigned to them and update the status of their assigned tasks.

If the root cause cannot be identified easily, you can create a problem solving process, to identify the root cause of the issue.

Note:

To create a problem solving process, or identify the root cause, you will need separate licenses for Control Plans and Problem Solving.

Example:

Consider a scenario where there are issues in the production line of the steering wheel assembly of car. The problem occurs for a few weeks, and isolated incidents are resolved, but the issues keep occurring. Realizing that the issues could be related to oversight in processes, the company decides to conduct an ad-hoc internal audit to inspect all the steps in the steering wheel production process.

After the audit execution, the lead auditor reports the audit findings. One of the findings is that the steering wheel inspection process is not followed as defined. The team creates quality actions for addressing this issue and assigns them to the users responsible. The users check their inbox for the quality actions assigned to them, perform the necessary tasks, and update the status of their assigned tasks.

View the RYG rating, quality issues, and problem solving processes associated with the audit object


The red, yellow, green (RYG) ratings are used at the program, project, subproject, event, checklist, and question levels to indicate the status of the various criteria. To view the RYG ratings, you must associate an RYG rating to a checklist.

You can view the RYG rating, quality issues, and problem solving processes associated with the audit object.

1. Navigate to the audit object and open it.
2. Select a checklist, or a question from the checklist.

3. Click the **Quality** tab.

The RYG rating, quality issues, and problem solving processes associated with the checklist or the selected question from the checklist are displayed.

To export the quality issues and problem solving processes associated with the checklist or the question, click **Export to Excel** .

For more information, see *Understanding RYG ratings in a quality checklist* in *Quality Project Management* of the Teamcenter documentation.



Add quality actions for audit findings

After the audit findings are recorded, you can create quality actions for these findings and assign them to the users responsible.

1. Open the required quality audit and click the **Findings** tab.
2. In the **Findings** section, select the quality issue for which you want to create the quality action.
3. Click **Add to** and select the required type of quality action.
4. Specify the required properties.
5. Click **Add**.

Search for and respond to quality actions

After you perform the necessary actions to address the quality issue, you can search for quality actions assigned to you and complete them.


1. To search for the quality actions assigned to you:
 - a. Enter the search criteria in the global search, and click .
 - b. In **Filters**, from **Type**, select **Quality Action**.
 - c. In **Search Filters**, select the quality action and click **Open** .
2. To complete the quality action:
 - a. Type a comment and click the **Confirm** button.
 - b. Click the **Complete** button.

9. Generate audit reports

Generate a process audit report

You can generate a process audit report that conforms to standard process audit norms. All the values included in the report are derived from the responses to the checklist questions and their corresponding rating values.

Procedure

1. Navigate to the audit and open it.
2. Choose **More Commands** **...** > click **New** > **Generate Report** .
3. In the **Generate Report** panel, from **Reports**, select **Process Audit**.
4. Specify the required properties.
5. Select or clear the **Run in Background** check box.
6. Click **Generate**.

The process audit report is available in the **Attachments** tab.

10. Review the identified quality actions

During the follow-up phase, the users responsible are assigned quality actions to address the audit findings. After the users perform the required actions to address the audit findings and respond to the quality actions, the lead auditor reviews these actions and their status to ensure that the issues are fixed. You can set individual workflows to approve or reject actions between the auditor and the auditee.

If an issue related to an audit finding is not fixed, the lead auditor can create and assign new quality actions.

1. Open the quality audit object and click the **Findings** tab.
2. In the **Findings** section, select the quality issue for which you want to create the quality action.
3. Click **Add to** and select the required type of quality action.
4. Specify the required properties.
5. Click **Add**.

11. Share a quality audit and audit plan with other sites in a Multi-Site Collaboration network

After creating a quality audit and an audit plan 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 audit and the audit plan with the required sites. Then, specify additional sharing details, such as the destination sites and several transfer options.



Prerequisites

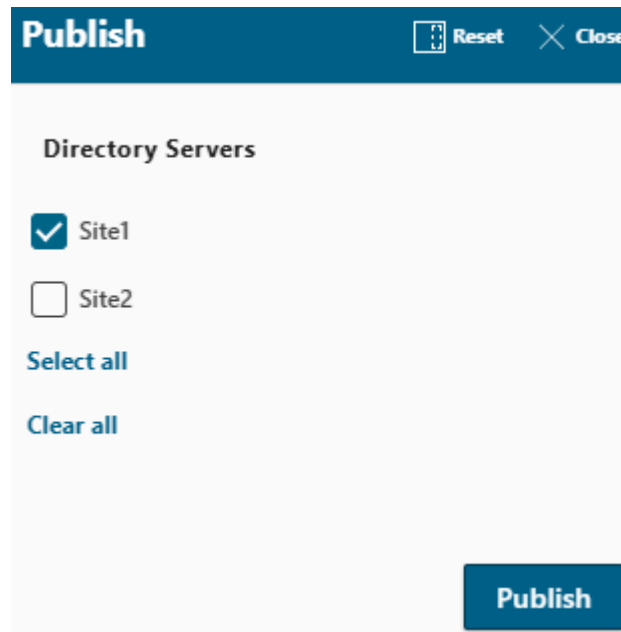
- The administrator has installed and configured Multi-Site Collaboration for all sites in your network.
- The administrator has enabled the quality audit and audit plans for publishing and transferring to other sites.


Procedure



1. Open the quality audit or audit plan that you want to share.


If you are working in the **Quality Management** workspace, click the **AUDIT AND ASSESSMENT** tile, and select and open the required quality audit or audit plan.



2. To publish the quality audit or audit plan, 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 audit or audit plan, the globe with a share symbol  appears next to the name of the quality audit or audit plan.

3. To cancel publishing a quality audit or audit plan, 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 audit or audit plan, the globe with a share symbol  is removed from the name of the quality audit or audit plan.

4. To share the quality audit or audit plan, 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 audit or an audit plan only if 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 attachments or quality audit agenda to share with the audit or audit plan.

- f. To transfer the site ownership of the quality audit or the audit plan to the destination site, select **Transfer Site Ownership**.

When you transfer the site ownership, all revisions of the quality audit and the audit plan are shared.

Share with Sites Reset Close

*** Destinations:**

Site-4

Option Set:

MultiSiteExpOptSet

Transfer Site Ownership

Modified Only

Relations:

Quality Audit Attachments, Quality Audit Agenda Rela...

▼ Owner

↔ Replace

infodba

▶ Option Overrides

Share

- g. (Optional) Change the owner of the transferred quality audit and audit plan 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 audit or the audit plan at a time. The site with ownership can modify the quality audit and audit plan. The other sites contains a replica of the quality audit and the audit plan.

- 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 audit or audit plan with the destination sites.

You receive a notification when the transfer is complete. Send an email or a 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 audit or the audit plan, 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 a notification message about the shared quality audit or the audit plan, in the destination site, to access the quality audit or the audit plan, do the following:
 - a. In **Advanced Search**, select **General**, and then **Quality Audit** as the type of search, and click **Search**.
 - b. In the search results, select the shared quality audit and the audit plan, and open it to work on it.

12. Close the audit

After the audit is executed, the follow-up actions are performed and reviewed. If there are no more open actions, the audit planner closes the audit.

1. Open the audit object.
2. Click the **Workflow** tab.
3. In the **TASK TO PERFORM** section, enter your comments in the **Comments** box.
4. Click **Complete** to close the audit.