# TEAMCENTER

# Quality Issues

Teamcenter 2412

SIEMENS

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# Contents

# 1. What is Quality Issue?

Teamcenter Quality Issue allows you to capture issues in various forms of complaints, defects, and non-conformances that inconvenience customers, in a central location. You can record the symptoms of the issue in symptom defects and define an action plan for the issue through a combination of containment actions. After reviewing and investigating the issue, you can create a Problem Solving process to resolve the issue.

Example:

Consider a scenario where the wiper blade in a car is not working correctly. There might be multiple reasons for this issue, such as:

- The wiper blade was not fixed properly to the wiper arm.
- The width of the wiper blade is not proportionate to the wiper arm.
- The dimensions of the wiper blade and wiper arm were not considered during the design process.
- Poor quality raw material was used during the manufacturing process.

Using Quality Issue, in Teamcenter, you can record the wiper blade issue, create symptom defects for the issue, and create the containment actions to be taken to stop the production of the faulty wiper blade. Finally, you can create a Problem Solving process to find the root cause of the issue and resolve it.


## Where do I go from here?

| | |
|---|---|
| Installer | To know which features are required to install Quality Issue, see the *Install Problem Solving and Quality Issue* section of *Teamcenter Quality —Deployment and Administration*. |
| Administrator | To configure Quality Issue according to your business requirements, see the *Configure Problem Solving and Quality Issue* section of *Teamcenter Quality —Deployment and Administration*. |
| Business User | |
| How can I get started with Quality Issue in Teamcenter? | You can start by **creating an issue** and **recording the symptom defects.** |
| After creating the issue, what are the next steps in Teamcenter? | You can **define the issue containment actions** as a next step. |
| After reviewing and investigating the issue, what is the final step? | You can **create a Problem Solving process** to resolve the issue. |

# 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.

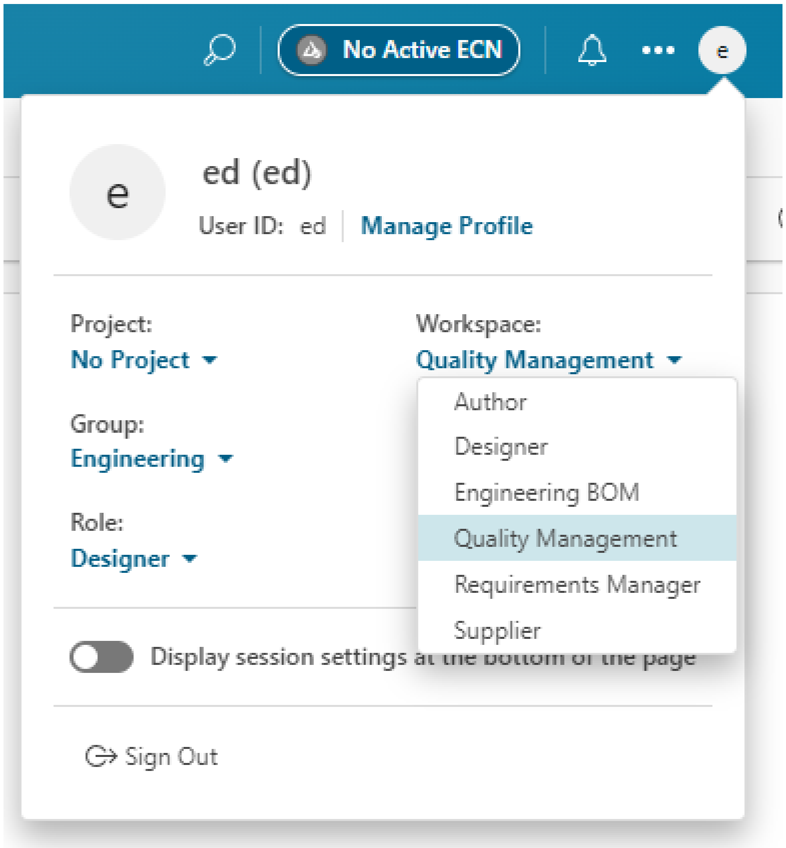
Your administrator must make the **Quality Management** workspace available for your organization's groups and roles.

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

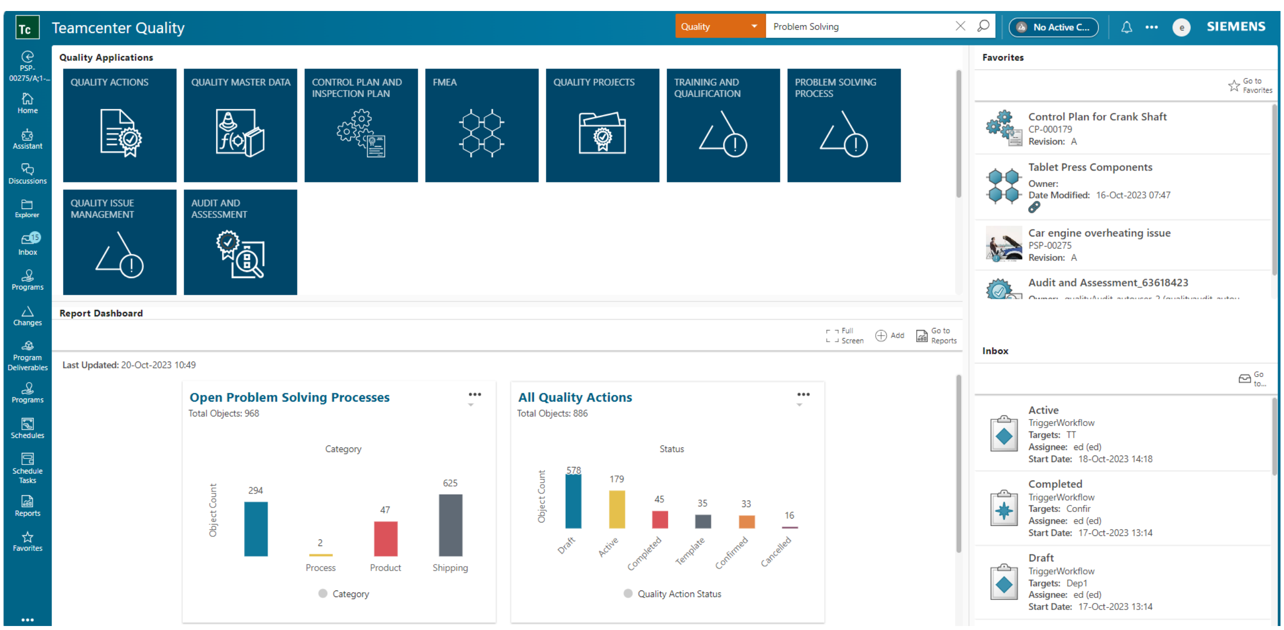
To access the tile for your Quality application in the **Quality Management** workspace:

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. Create an issue

When you identify a potential problem that must be investigated, you can capture it as an issue.

You can create the following types of issues:

- **Quality Issue**: Create this issue when you find a problem with the quality of the product.
- **Customer Complaint Issue**: Create this issue when you receive a complaint from a customer about the product.
- **Non-Conformance Issue**: Create this issue when you find that the product does not meet the defined requirements.
- **Non-Conformance for Life Sciences**: Create this issue for Life Sciences products that do not meet the defined requirements of the Life Sciences industry.

> Note:
>
> The **Non-Conformance for Life Sciences** option is available in the **Create Change** panel when the administrator installs the **Quality Management for Life Sciences Industry** template.

You can create an issue using any of the following methods:

- Create an issue from an existing issue by saving the existing issue as a new issue, and then updating the required details.

  To investigate repetitive problems or similar problems, you can create an issue from an existing one. You can choose which information you require from the existing issue and use it in the new issue.

- Create a new issue.

1. On the home page, click the **CHANGES** tile.
2. To create an issue from an existing issue, do the following:
   a. From the **CHANGES** folder, select and open the issue that you want to use as the source.

      If you are working in the **Quality Management** workspace, click the **QUALITY ISSUE MANAGEMENT** tile, and select and open the source issue.

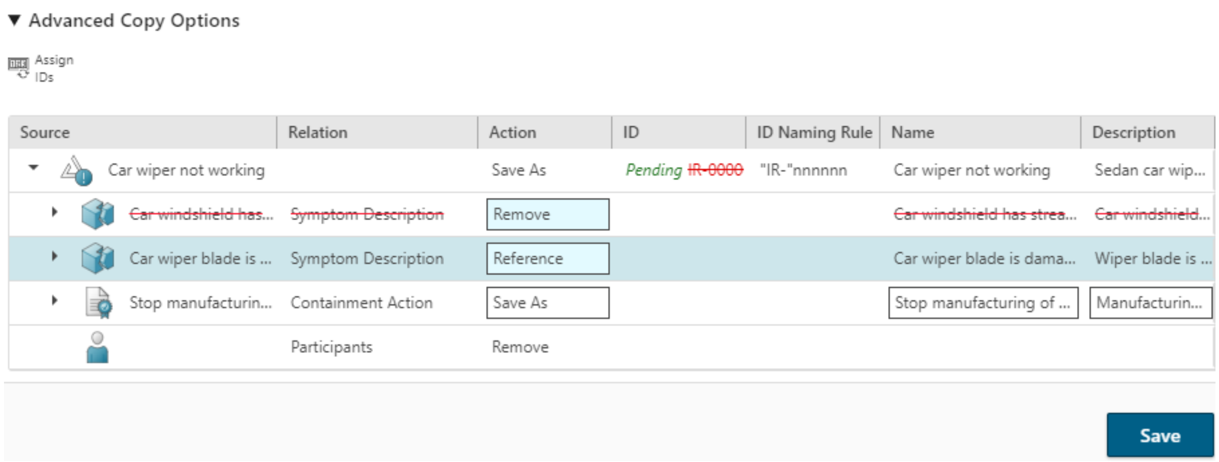
   b. In the **Overview** tab, choose **More Commands** ••• > **New** > **Save As**.
   c. In the **Synopsis** box, summarize the issue.

d. In the **Description** box, describe the issue.

e. If the **Advanced Copy Options** section, select what objects you want to keep, reference, or remove.

You can choose from the following options:

| Option | Description |
|---|---|
| **Reference** | References the object in the new issue. |
| **Remove** | Removes the object from the new issue. |
| **Save As** | Saves a copy of the object in the new issue. |




f. Click **Save**.

The issue is created and displayed in edit mode. The following objects are copied from the source issue using the following type of copy:

| Type of object | Copied as reference or creates a new object of the same type as the related object |
|---|---|
| Problem Items | Copy As Reference |
| Affected Items | Copy As Reference |
| Reference Items such as Item Revisions, FMEAs, Control Plans, Quality Audits, Quality Projects, Quality Programs, or Vendors | Copy As Reference |
| Dataset Reference Items | Copy As Object |
| Web Links | Copy As Object |
| Symptom Defects; their attachments and quality actions | Copy As Object |

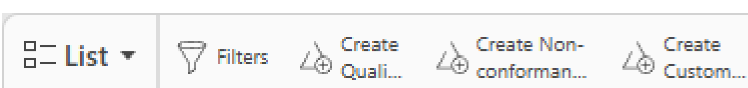
| Type of object | Copied as reference or creates a new object of the same type as the related object |
|---|---|
| Defective Items of Symptom Defects | Copy As Reference |
| Quality Actions | Copy As Object for the quality action's name and description only.<br><br>The status of the quality action is set to **Draft** in the new issue. |
| Attachments | Copy As Object |
| Relations of the symptom defect to its failure | Copy As Reference |
| Thumbnail | Copy As Object |
| • Issue Approvers<br>• Issue Owners<br>• External Users<br>• Reports generated for the issue<br>• Problem Solving processes and related issues that are implemented for the source issue<br>• Relations to other issues and changes | These objects are not copied to the new issue. |

3. To create a new issue, do the following:

   a. Choose **More Commands** ••• > **New** > **Create Change**.

      If you are working in the **Quality Management** workspace, click the **QUALITY ISSUE MANAGEMENT** tile, and click one of the following options from the work area toolbar:

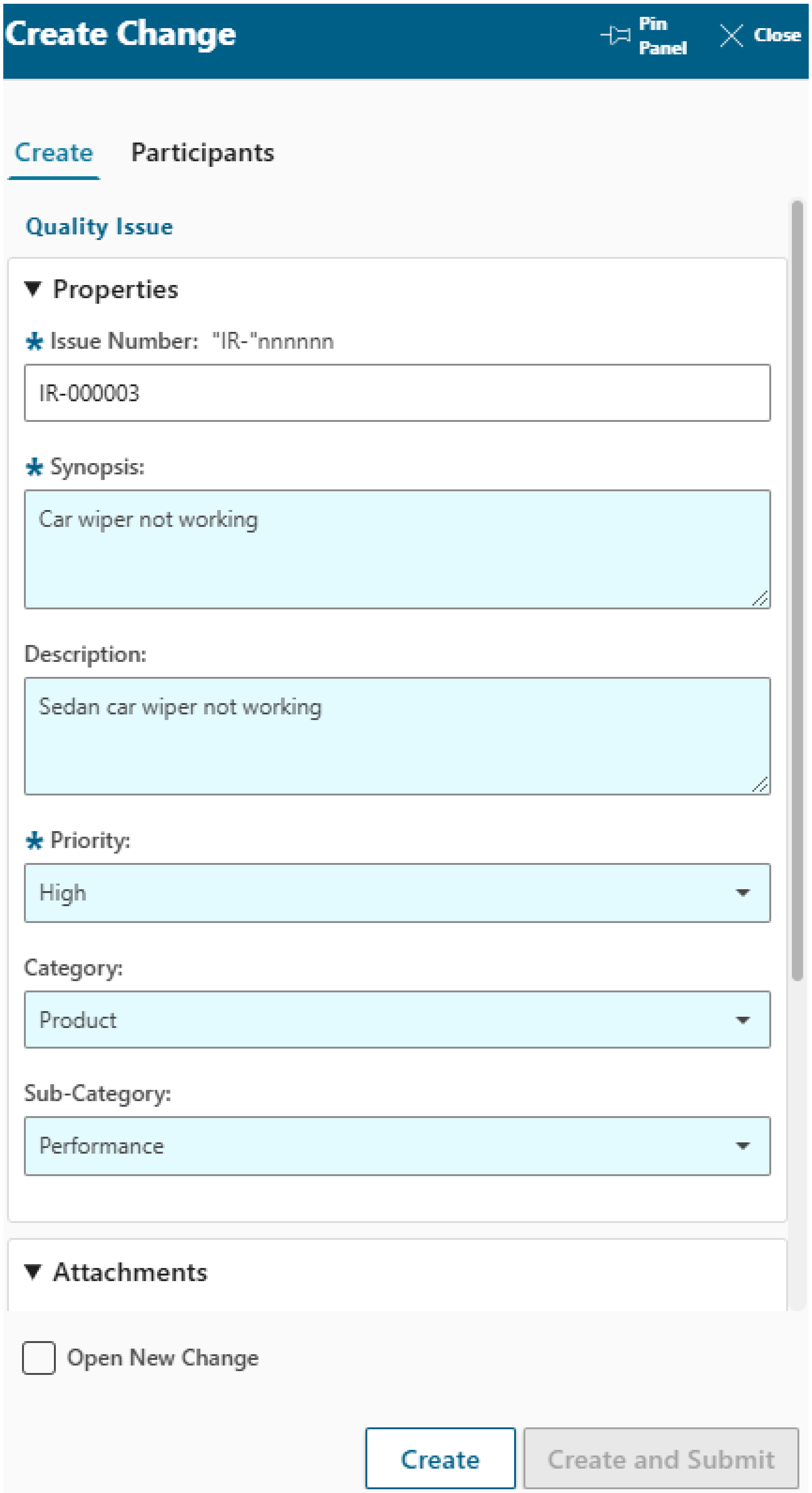
      - **Create Quality Issue**
      - **Create Non-conformance Issue**
      - **Create Customer Complaint Issue**

   b. In the **Create Change** panel, select the type of issue you want to create.

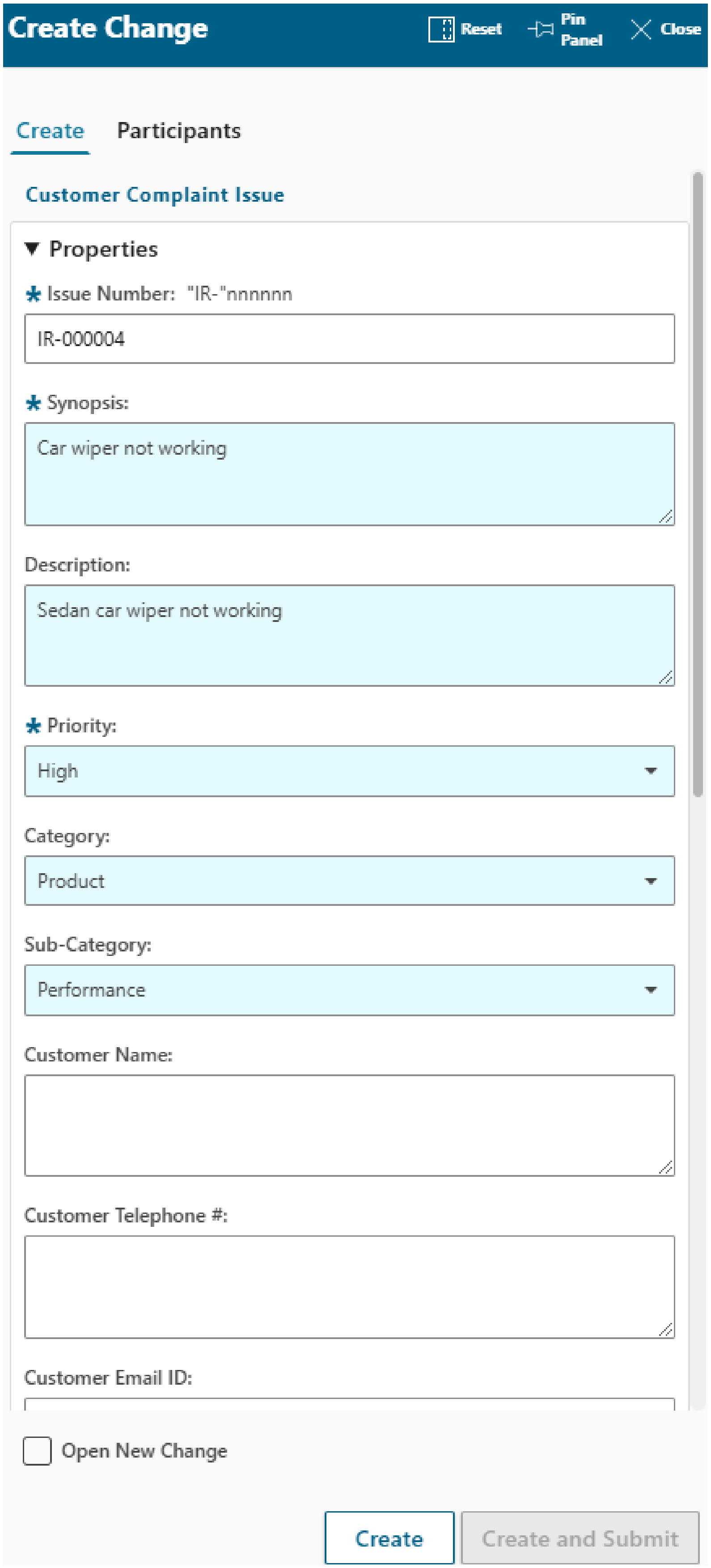
c. In the **Synopsis** box, summarize the issue.

d. In the **Description** box, describe the issue.



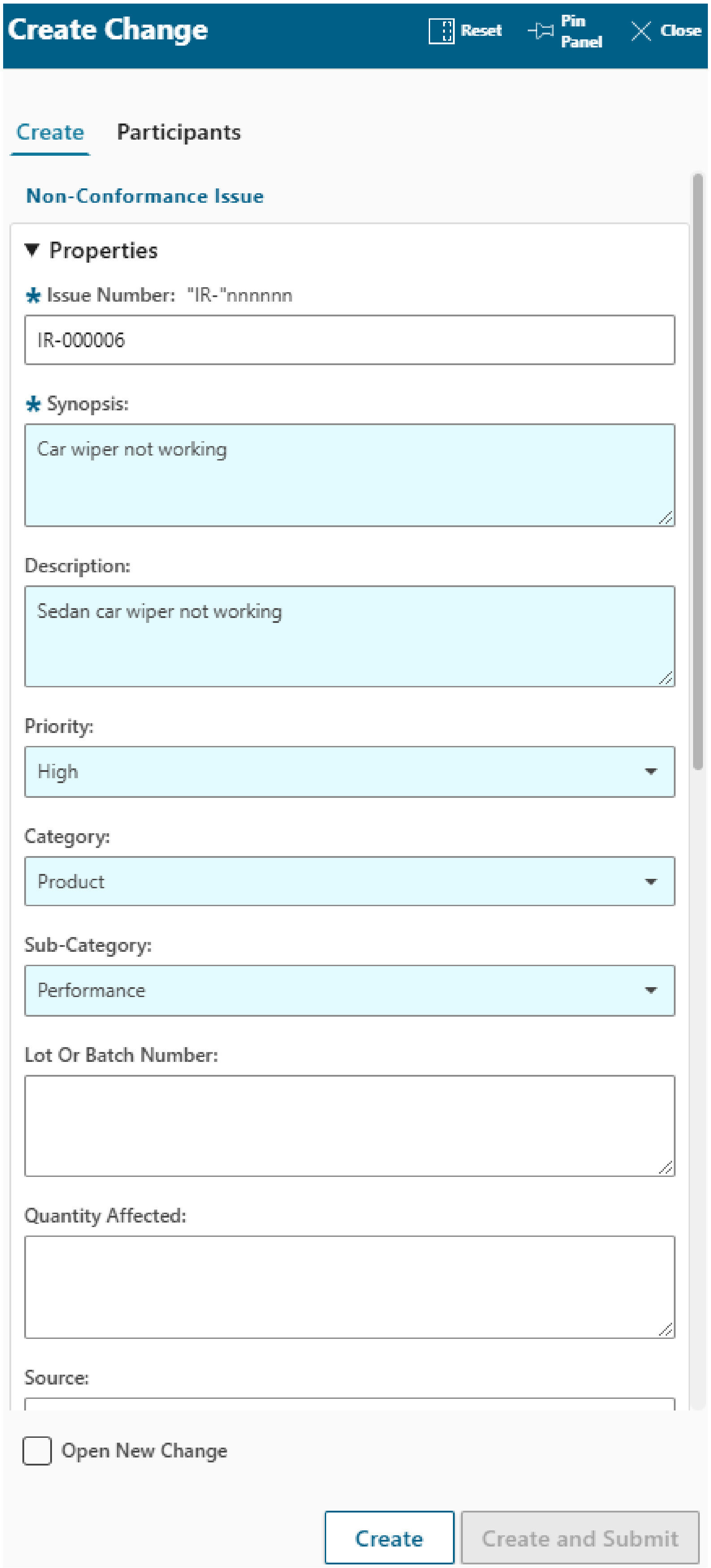

e. If you are creating **Customer Complaint Issue**, specify the following additional information:

- **Customer Name**
- **Customer Telephone #**
- **Customer Email ID**
- **Customer Address**
- **Incident Details**
- **Incident Date And Time**
- **Incident Location**


Create Change
Reset
Pin Panel
Close
Create
Participants
Customer Complaint Issue
Properties
Issue Number: "IR-"nnnnnn
IR-000004
Synopsis:
Car wiper not working
Description:
Sedan car wiper not working
Priority:
High
Category:
Product
Sub-Category:
Performance
Customer Name:
Customer Telephone #:
Customer Email ID:
Open New Change
Create
Create and Submit

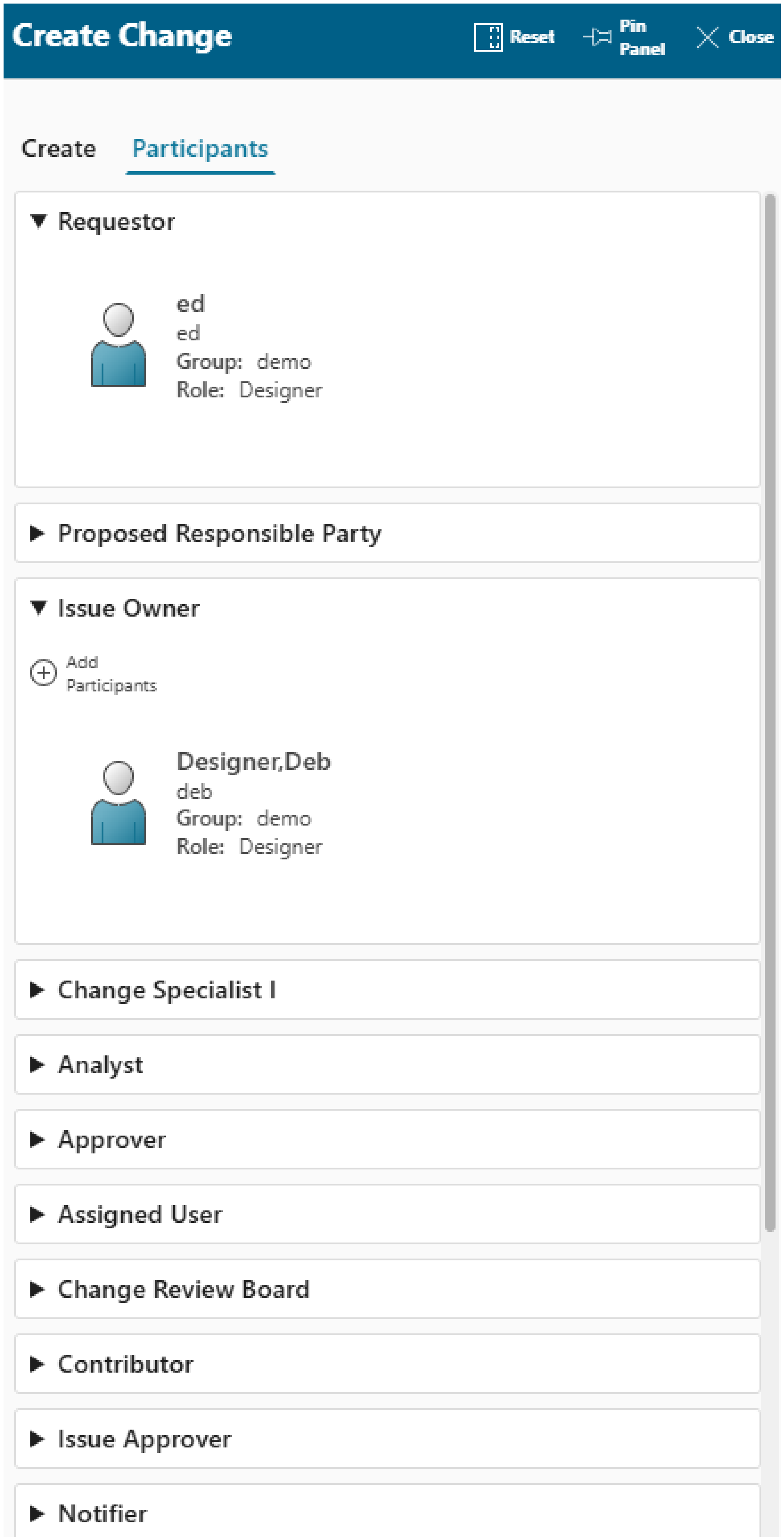
f. If you are creating **Non-Conformance Issue**, specify the following additional information:

- **Lot Or Batch Number**
- **Quantity Affected**
- **Source**
- **Source Contact Information**
- **Contractor Or Supplier**
- **Date Identified**
- **Drawing Number**
- **Found During Activity**

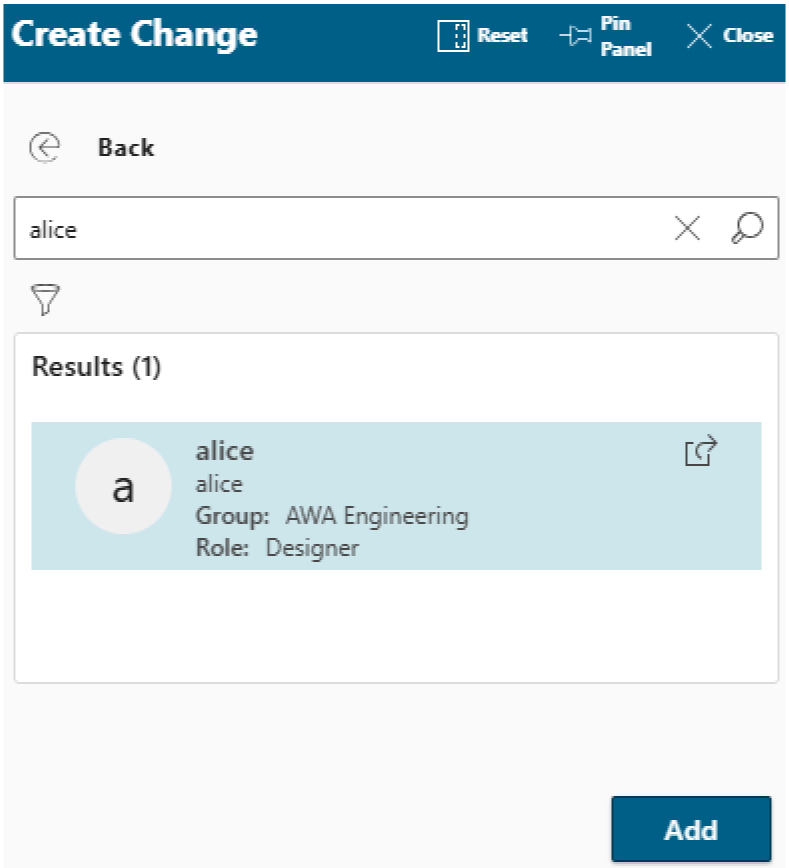

Create Change
Reset
Pin Panel
Close
Create
Participants
Non-Conformance Issue
Properties
Issue Number: "IR-"nnnnnn
IR-000006
Synopsis:
Car wiper not working
Description:
Sedan car wiper not working
Priority:
High
Category:
Product
Sub-Category:
Performance
Lot Or Batch Number:
Quantity Affected:
Source:
Open New Change
Create
Create and Submit

g. While creating an issue, to assign the users who will work on the issue, click the **Participants** tab, and do the following:

   A. In the specific section, click **Add Participants** ⊕.


Create Change
Reset
Pin Panel
Close
Create
Participants
Requestor
ed
ed
Group: demo
Role: Designer
Proposed Responsible Party
Issue Owner
Add Participants
Designer,Deb
deb
Group: demo
Role: Designer
Change Specialist I
Analyst
Approver
Assigned User
Change Review Board
Contributor
Issue Approver
Notifier

B. In the search panel, search for and select the user to be assigned, and click **Add**.




C. Click the **Create** tab to enter the remaining properties.

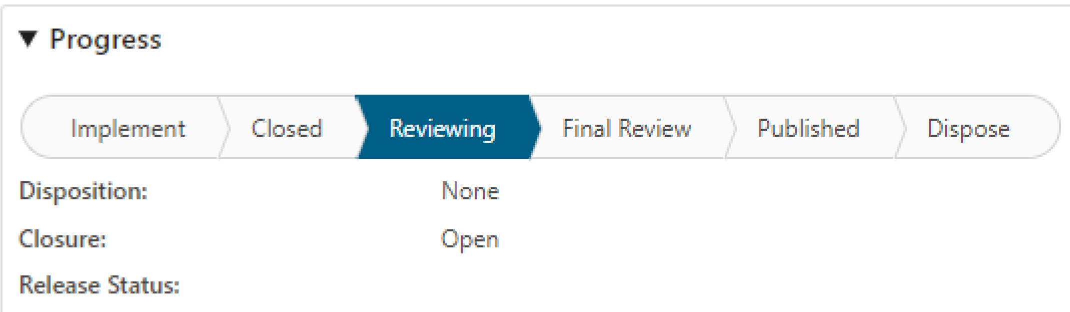
h. Enter the remaining properties and then click **Create**.

The issue is created and displayed in edit mode.

# 4. Edit an issue

After you create the issue, you can edit it to provide additional details. As you continue updating the issue process, the updates can be viewed at a single location in the **Overview** tab. You can track the progress of the issue through these stages in the **Progress** bar:

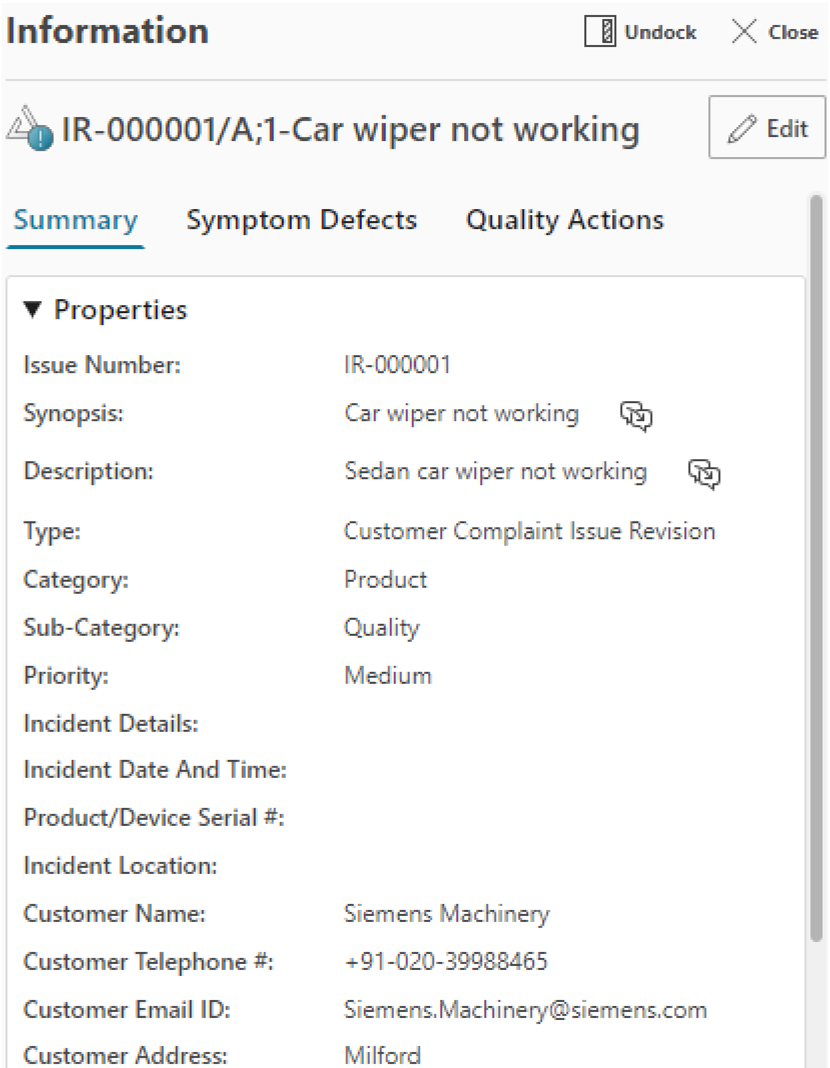
1. **Implement**
2. **Closed**
3. **Reviewing**
4. **Final Review**
5. **Published**
6. **Dispose**




> Note:
>
> You cannot modify the issue if it is closed or canceled.

1. From the **CHANGES** folder, select and open the issue that you want to edit.
2. In the **Overview** tab, choose **More Commands** ••• > **Edit** > **Start Edit**.

   You can also click **Information** to view the issue details and edit them. In **Information**, you can also view which symptom defects and quality actions are added to the issue.




3. In the **Properties** section, edit the **Synopsis**, **Description**, and other required properties of the issue.

4. Specify a proposed due date.

   Some companies use a standard operating procedure where an issue must be completed within a specific duration. This duration is based on the **Priority** of the issue. If your company has defined this standard operating procedure for you, you must specify a **Proposed Due Date** that matches the priority of the issue. For example, if the **Priority** is **High**, set the **Proposed Due Date** to 30 days and earlier from the **Creation Date** of the issue.

   Depending on the **Priority** of the issue, set the **Proposed Due Date** as follows:

| Priority | Duration assigned to Proposed Due Date |
|---|---|
| **High** | **Proposed Due Date** must be set to 30 days and earlier from the **Creation Date** |
| **Medium** | **Proposed Due Date** must be set to 45 days and earlier from the **Creation Date** |
| **Low** | **Proposed Due Date** must be set to 60 days and earlier from the **Creation Date** |

Your administrator can configure the duration assigned to the **Proposed Due Date** as per the business requirements. If the **Proposed Due Date** is not automatically set to a duration based on the assigned **Priority**, the administrator has disabled this option for your company.

> Note:
>
> The **Proposed Due Date** of the issue must not be later than the **Due Date** of the assigned quality actions.

5. To make the current issue available for searching in **Supplier Quality Hub**, select **Visible for Vendor**.

6. If you are creating a **Quality Issue**, from the **Priority** list, select the priority of the issue.

7. In the **Contacts and Dates** section, add a release date and time in the **Released Date** field.

8. To associate the projects or subprojects of the issue, do the following:

   a. In the **Projects** section, to associate the projects or subprojects of the issue, click **Projects** ⊕.

   b. In the **Projects** panel, search for and select the required projects or subprojects, and click **Add Project**.

   c. To remove a project or subproject, select it, and click **Remove Project** ⊖.

   d. After you complete adding the required projects, click **Save**.

9. To add an Issue Owner, do the following:

   a. In the **Issue Owner** section, click **Add** ⊕.

   b. In the **Add** panel, search for and select the user to be assigned as the Issue Owner, and click **Add**.

10. In the **Related Issues** section, you can add the related issues as follows:

    a. Click **Add to** ⊕.

    b. In the **Add** panel, click the **Palette** tab or the **Search** tab to locate the required issues.

c. Select the required issues and click **Add**.

11. If you have derived an engineering change request (ECR), engineering change notice (ECN), Problem Solving process, or a simple change from the current issue, the derived objects are listed in the **Implemented By** section. After saving the edits you have made, you can add more ECRs, ECNs, Problem Solving processes, or simple changes as follows:

    a. In the **Implemented By** section, click **Add to** ⊕ to add the objects that implement the issue.

    b. In the **Add** panel, click the **Palette** tab or the **Search** tab to locate the required objects.

    c. Click **Add**.

12. In the **Summary** section, do the following:

    a. Select the **Is Valid** check box to indicate that the issue is valid.

    b. Select the **Reject Action** check box to reject the issue.

    c. From the **Resolution Type** list, select the type of resolution required to resolve the issue.

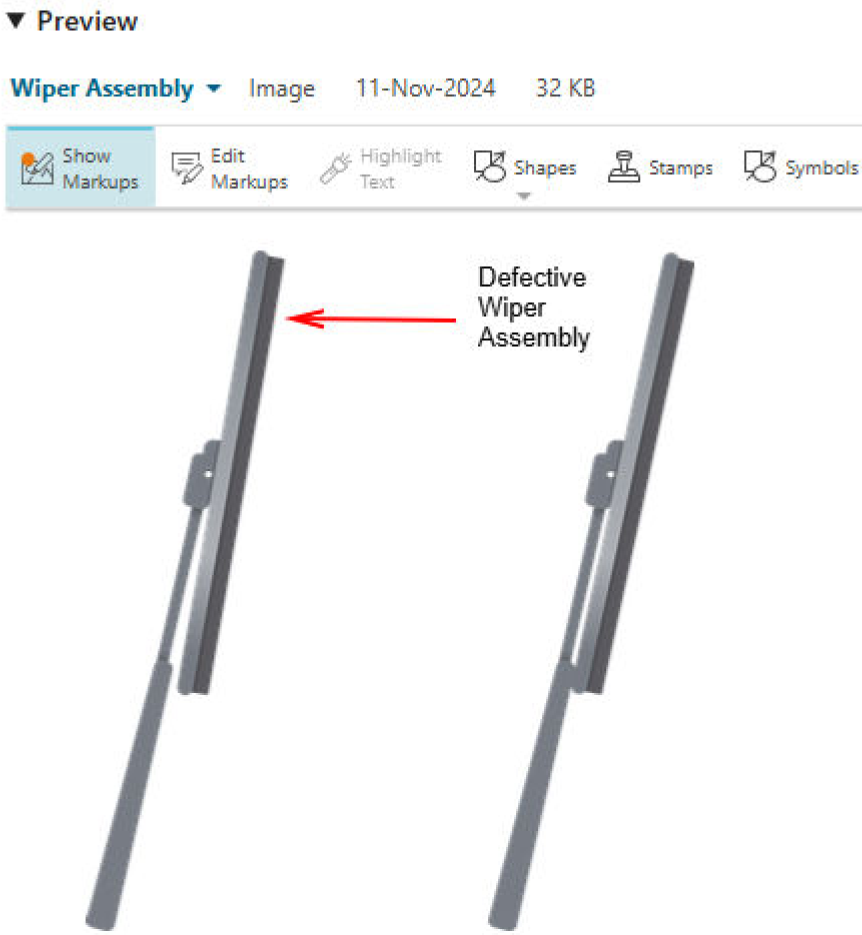
    d. In the **Resolution Description** box, type a description of the resolution.

    e. In the **Closure Comments** box, type the comments to be added when closing the issue.

13. In the **Preview** section, view all the images and PDF files that are added to the issue as attachments.

    You can also mark up a PDF or an image file within the universal viewer. You can also specify which level of users can view the markups. For more information, see *Document Management on Active Workspace —Usage* in the Teamcenter documentation.

    To increase the work area, you can hide the **Preview** section by choosing **More Commands** ••• > **View** > **Show/Hide Preview**.




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

# 5. Create a plan for the issue

After you create the issue, you can create a plan to track the associated projects, supplier information, and customer information.

Note:

- The associated objects from the **Plan** tab are also added to the **Reference Items** section in the **Symptom Description** tab.
- The administrator can configure which sections appear in the **Plan** tab depending on the business requirements. For each section, the administrator will install the required templates, and make the required changes in the XRT Editor to display or remove the required sections.

1. From the **CHANGES** folder, select and open the issue.

2. Click the **Plan** tab.

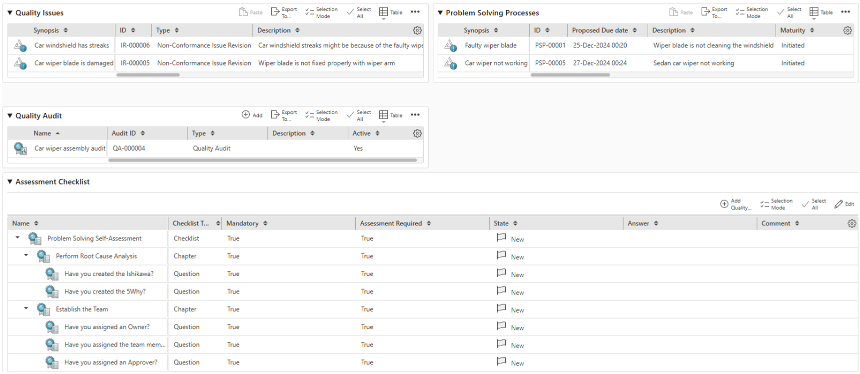
3. Expand the **Program Information** section and do the following:

| Section | Actions to be performed |
|---|---|
| **Program/Project** | a. In the **Program/Project** section, to associate the programs, projects, or subprojects of the issue, click **Add to** ⊕.<br><br>b. In the **Add** panel, search for and select the required programs, projects, or subprojects, and click **Add**.<br><br>c. To remove a program, project, or subproject, select it, and click **Remove** ⊖.<br><br>Note:<br>If you remove a project, the associated events are removed from the **Event** section. |
| **Event** | a. In the **Event** section, to associate the events of the issue's programs, projects, or subprojects, click **Add to** ⊕.<br><br>b. In the **Add** panel, search for and select the required events, and click **Add**.<br><br>The search results display only the events that are a part of the programs, projects, or subprojects added in the **Program/Project** section. |

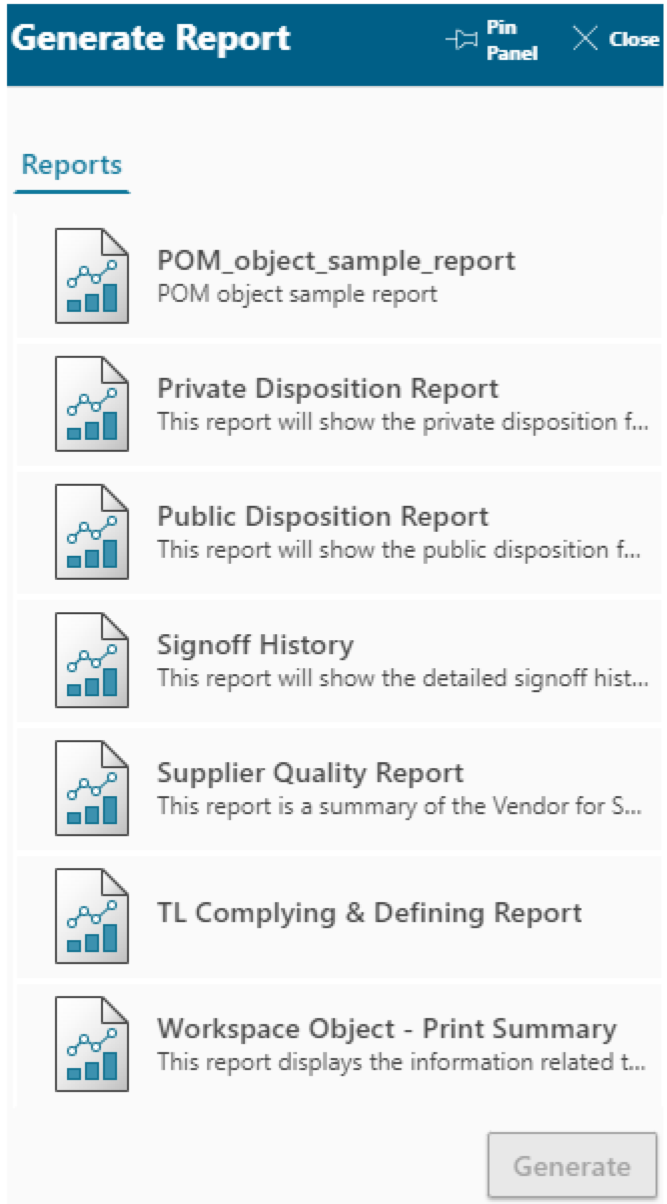
| Section | Actions to be performed |
|---|---|
| | c. To remove events, select the events, and click **Remove**. |

4. Expand the **Supplier Information** section and do the following:

<table>
<tr><th>Section</th><th>Actions to be performed</th></tr>
<tr><td>Vendor</td><td>
a. In the Vendor section, to associate the vendor for the issue, click Add to.<br><br>
b. In the Add panel, search for and select the required vendor, and click Add.<br><br>
c. To remove the vendor, select the vendor, and click Remove.<br><br>
Note:<br><br>
If you remove a vendor, the associated brands, partner contracts, contacts, and locations are also removed from the below sections.<br><br>
d. To view all the issues that are assigned to this vendor, select and open the vendor and click the Quality Management tab.<br><br>
In this tab, you can do the following:<br><br>
• Create new issues and Problem Solving processes by choosing More Commands > New > Create Change and by specifying the required information.<br><br>
• Add existing issues and Problem Solving processes by choosing More Commands > Manage > Add to My Changes and then selecting the required objects.<br><br>
• Assess the vendor by using a quality checklist as follows:<br><br>
A. In the Assessment Checklist section, click Add Quality Checklist.<br><br>
Note:<br><br>
The Quality Manager must create the checklists for you in the Quality Master Data library. To create checklists, the administrator must install Quality Project Management. For more information, see Quality Project Management and Teamcenter Quality —
</td></tr>
</table>

| Section | Actions to be performed |
| --- | --- |
| | *Deployment and Administration* in the Teamcenter documentation.<br><br>B. In the **Add Quality Checklist** panel, search for and select the required checklist, and click **Add**.<br><br>C. Specify a state, comment, and responsible user as appropriate.<br><br>D. To delete a checklist, select it, and click **Delete**.<br><br>E. In the confirmation message, click **Delete**.<br><br><br><br>• To generate a report of all the issues, Problem Solving processes, and checklists that are assigned to this vendor, do the following:<br><br>A. Select and open the vendor and click the **Reports** tab.<br><br>B. Choose **More Commands** > **New** > **Generate Report**.<br><br>C. In the **Generate Report** panel, select **Supplier Quality Report**. |

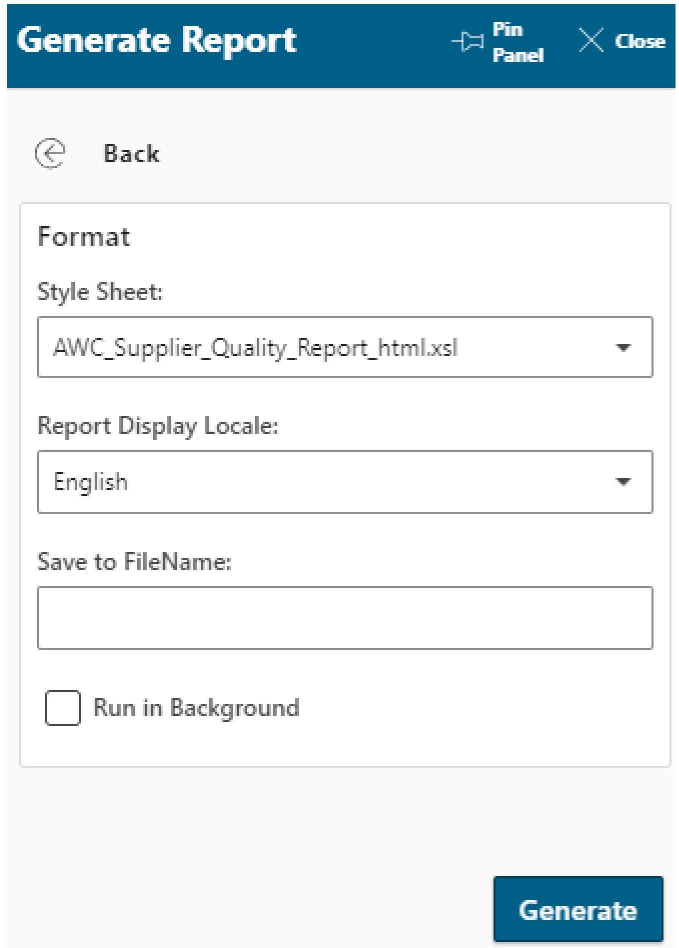
<table>
<tr><th>Section</th><th>Actions to be performed</th></tr>
<tr><td></td><td>

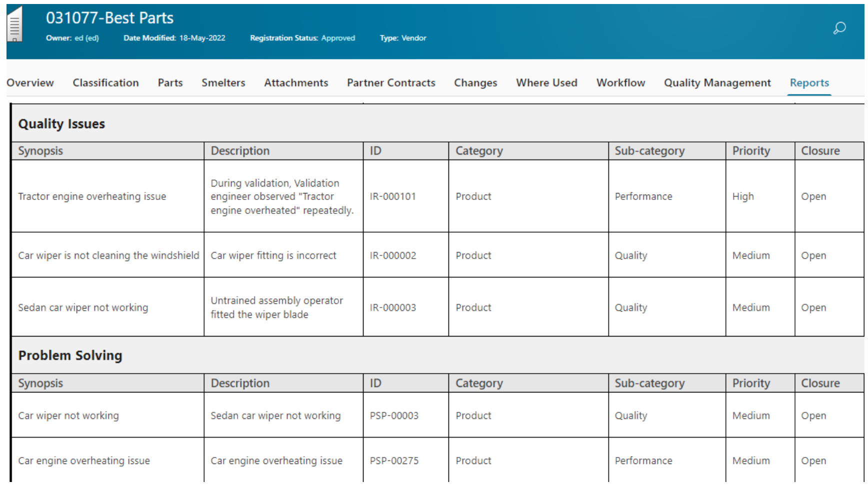



D. In the **Format** section, from the **Style Sheet** list, select the **AWC_Supplier_Quality_Report_html.xsl** style sheet.

E. From the **Report Display Locale** list, select the required locale.

</td></tr>
</table>

| Section | Actions to be performed |
| --- | --- |
| | <br><br>F. (Optional) In the **Save to FileName** box, type the file name of the report.<br>G. Click **Generate**.<br>The generated **Supplier Quality Report** is available in the **Reports** tab. |

<table>
<tr><th>Section</th><th>Actions to be performed</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>Brand</td><td>a. In the Brand section, to associate the vendor's brand with the issue, click Add to ⊕.<br><br>b. In the Add panel, search for and select the required brand, and click Add.<br><br>Note:<br>The Add panel displays only brands that belong to the vendors added in the Vendor section.<br><br>c. To remove the brand, select it, and click Remove ⊖.</td></tr>
<tr><td>Partner Contract</td><td>a. In the Partner Contract section, to associate the vendor's partner contract with the issue, click Add to ⊕.<br><br>b. In the Add panel, search for and select the required partner contract, and click Add.<br><br>Note:<br>The Add panel displays only partner contracts that belong to the vendors added in the Vendor section.<br><br>c. To remove the partner contract, select it, and click Remove ⊖.</td></tr>
<tr><td>Contact</td><td>a. In the Contact section, to associate the vendor's contact with the issue, click Add to ⊕.<br><br>b. In the Add panel, search for and select the required contact, and click Add.</td></tr>
</table>

<table>
<tr><th>Section</th><th>Actions to be performed</th></tr>
<tr><td></td><td>Note:<br><br>The system administrator can configure the Add panel to display contacts from only one of the following:<br><br>• Vendors added in the Vendor section<br><br>• Partner contracts added in the Partner Contract section<br><br>c. To remove the contact, select the contact, and click Remove ⊖.</td></tr>
<tr><td>Location</td><td>a. In the Location section, to associate the vendor's location with the issue, click Add to ⊕.<br><br>b. In the Add panel, search for and select the required location, and click Add.<br><br>Note:<br><br>The system administrator can configure the Add panel to display locations from only one of the following:<br><br>• Vendors added in the Vendor section<br><br>• Partner contracts added in the Partner Contract section<br><br>c. To remove the location, select it, and click Remove ⊖.</td></tr>
</table>

5. Expand the **Customer Information** section and do the following:

| Section | Actions to be performed |
|---|---|
| **Customer** | a. In the **Customer** section, to associate the customer to the issue, click **Add to** ⊕.<br><br>b. In the **Add** panel, search for and select the required customer, and click **Add**.<br><br>c. To remove the customer, select the customer, and click **Remove** ⊖. |

| Section | Actions to be performed |
| --- | --- |
| | Note:<br>If you remove a customer, the associated locations and contacts are removed from the below sections. |
| **Location** | a. In the **Location** section, to associate the customer's location with the issue, click **Add to** ⊕.<br>b. In the **Add** panel, select the required location, and click **Add**.<br>Note:<br>The **Add** panel displays only locations that belong to the customers added in the **Customer** section. |
| **Contact** | a. In the **Contact** section, to associate the customer's contact with the issue, click **Add to** ⊕.<br>b. In the **Add** panel, search for and select the required contact, and click **Add**.<br>Note:<br>The **Add** panel displays only contacts that belong to the customers added in the **Customer** section.<br>c. To remove the contact, select the contact, and click **Remove** ⊖. |

# 6. Assign the Issue Owner, Issue Approver, and External Users to the issue

After **creating an issue**, you can assign the users who are designated as Issue Owner, Issue Approver, and External User.

The Issue Owner updates the issue at each stage and submits the issue for approval depending on the workflow used by your organization. For example, the Issue Owner adds the symptom defects and submits the issue for approval.

The Issue Approver reviews the work of the Issue Owner and provides feedback if further changes are required. If no changes are required, the Issue Approver approves the work at that stage. The issue is then reassigned to the Issue Owner to continue work on it. For example, the Issue Approver reviews the symptom defects entered by the Issue Owner and then approves the issue. The issue is reassigned to the Issue Owner to work on the next stage: for example, derive Problem Solving processes from the symptom defects.

If your company has signed a partner contract with one of your vendors, then you can assign the partner representatives of the vendor to work on the issue as *External Users*. For more information about partner contracts, see *Partner Connect —Usage* in the Teamcenter documentation.

1. From the **CHANGES** folder, select and open the issue that you want to edit.

2. Click the **Team** tab.

3. To add an Issue Owner, do the following:

   a. In the **Issue Owner** section, click **Add** ⊕.

   b. In the **Add** panel, search for and select the user to be assigned as the Issue Owner, and click **Add**.

   c. If the Issue Owner changes, you can replace the existing Issue Owner:

      A. Select the existing Issue Owner in the **Issue Owner** section, and click **Replace** ⇄.

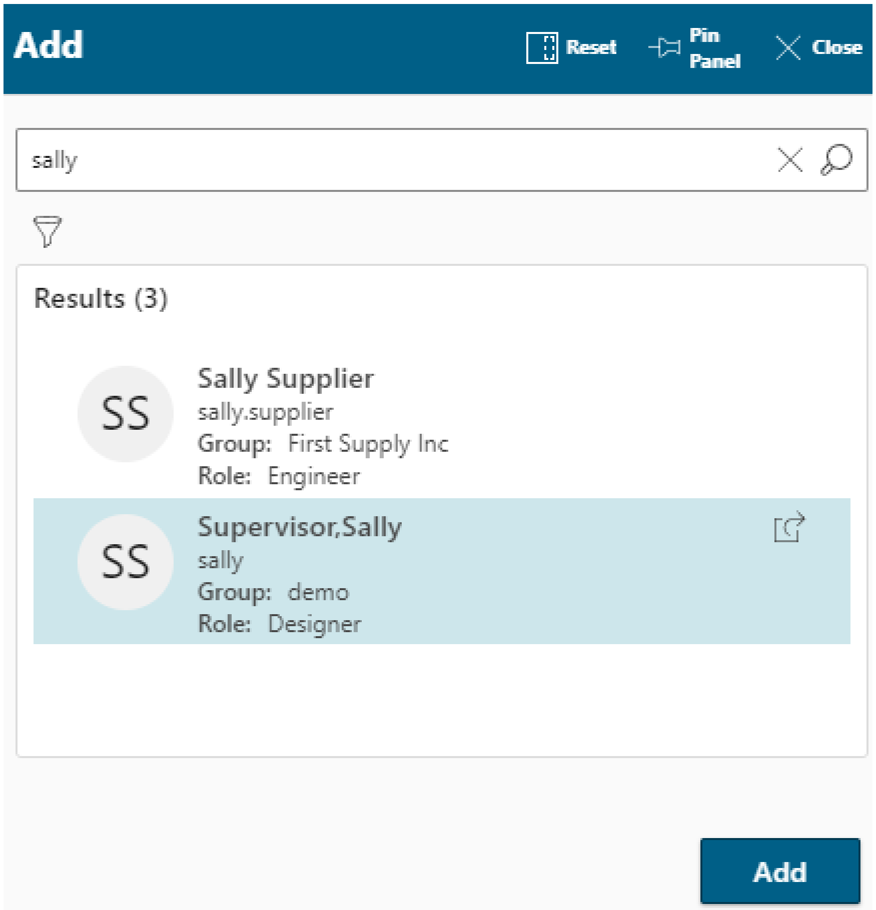
      B. In the **Replace** panel, search for and select the required user, and click **Add**.

      > Note:
      >
      > The issue must always have an Issue Owner assigned to it.

4. To add an Issue Approver, do the following:

a. In the **Issue Approver** section, click **Add** ⊕.

b. In the **Add** panel, search for and select the users to be assigned as the Issue Approvers in the **Users** tab and click **Add**.




c. If the Issue Approver changes, you can replace the existing Issue Approver:

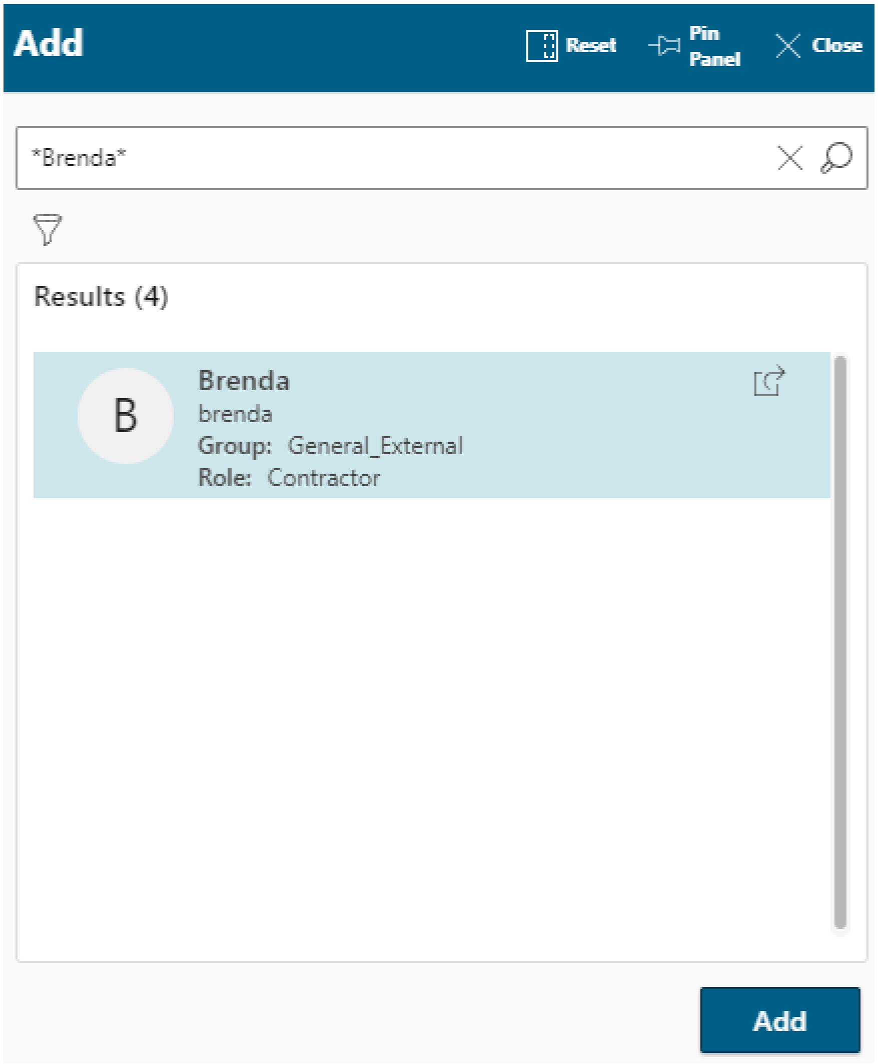
A. Select the existing Issue Approver in the **Issue Approver** section, and click **Replace**.

B. In the **Replace** panel, search for and select the required user, and click **Add**.

5. To add an *External User*, do the following:

a. In the **External User** section, click **Add** ⊕.

b. In the **Add** panel, search for and select the users to be assigned as the *External Users* in the **Users** tab and click **Add**.




c. To remove *External Users*, select them, and click **Remove Participant** ⊖.

# 7. Managing the symptoms of an issue

## Record the symptoms of an issue

A symptom defect is a defect used to record a symptom of an issue.

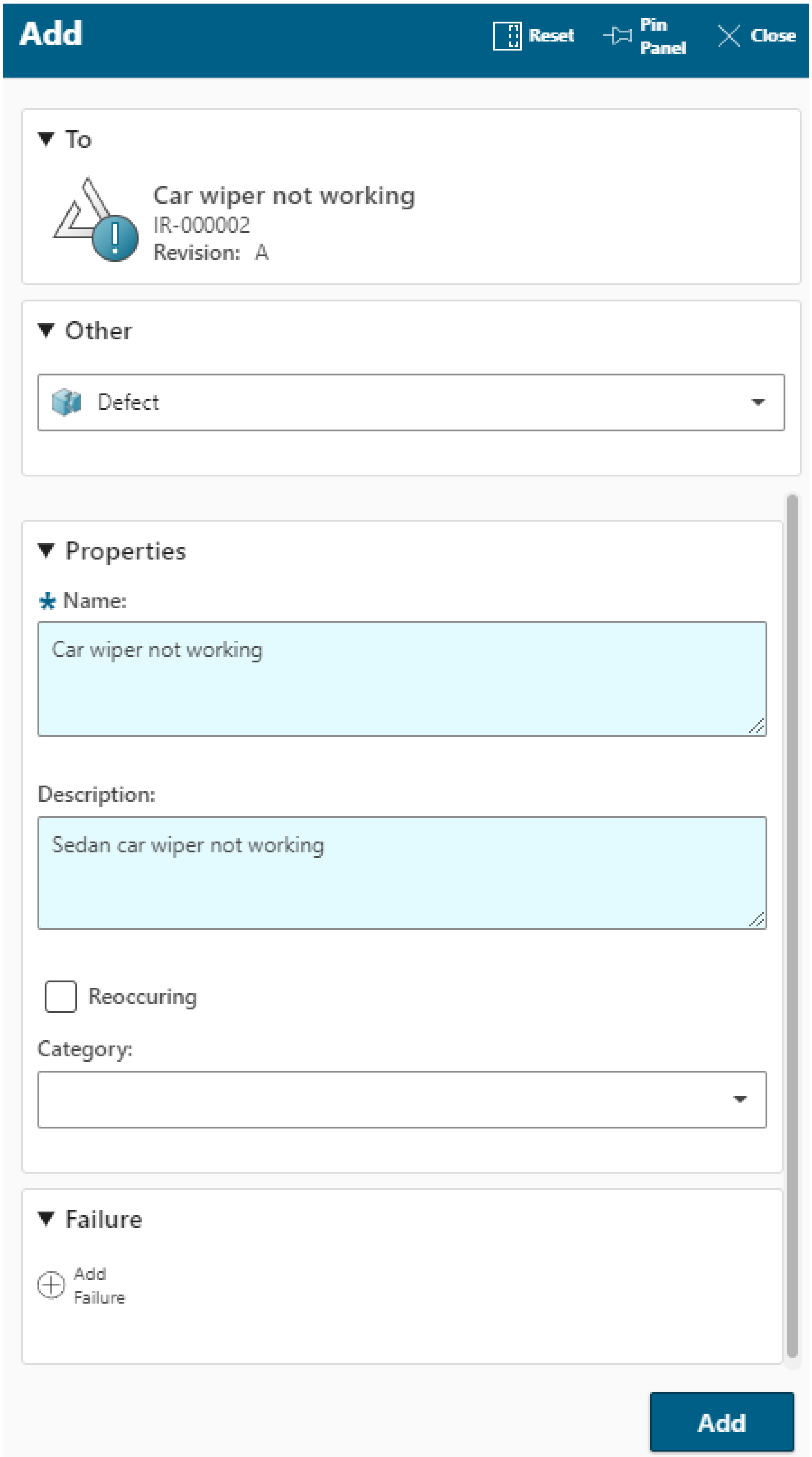
> Example:
>
> You find an issue with the windshield wipers of a car. Some of the symptoms of this issue are:
>
> - Streaks appear on the windshield.
> - Wiper blades do not move smoothly when run.
> - Wiper blades make a rattling sound when run.
>
> For each of the above symptoms, you can create a symptom defect and add it to the issue of the car wipers not working.

For each of these symptom defects, you can add the following:

- Failure code from the failure catalog
- Document and image attachments
- Quality actions
- Defective item

> Note:
>
> To create a symptom defect, you must have a Problem Solving license.

1. From the **CHANGES** folder, select and open the required issue.
2. Click the **Symptom Description** tab.
3. In the **Symptom Defect** section, click **Add**.
4. In the **Name** box, type the name of the symptom.
5. In the **Description** box, describe the symptom.

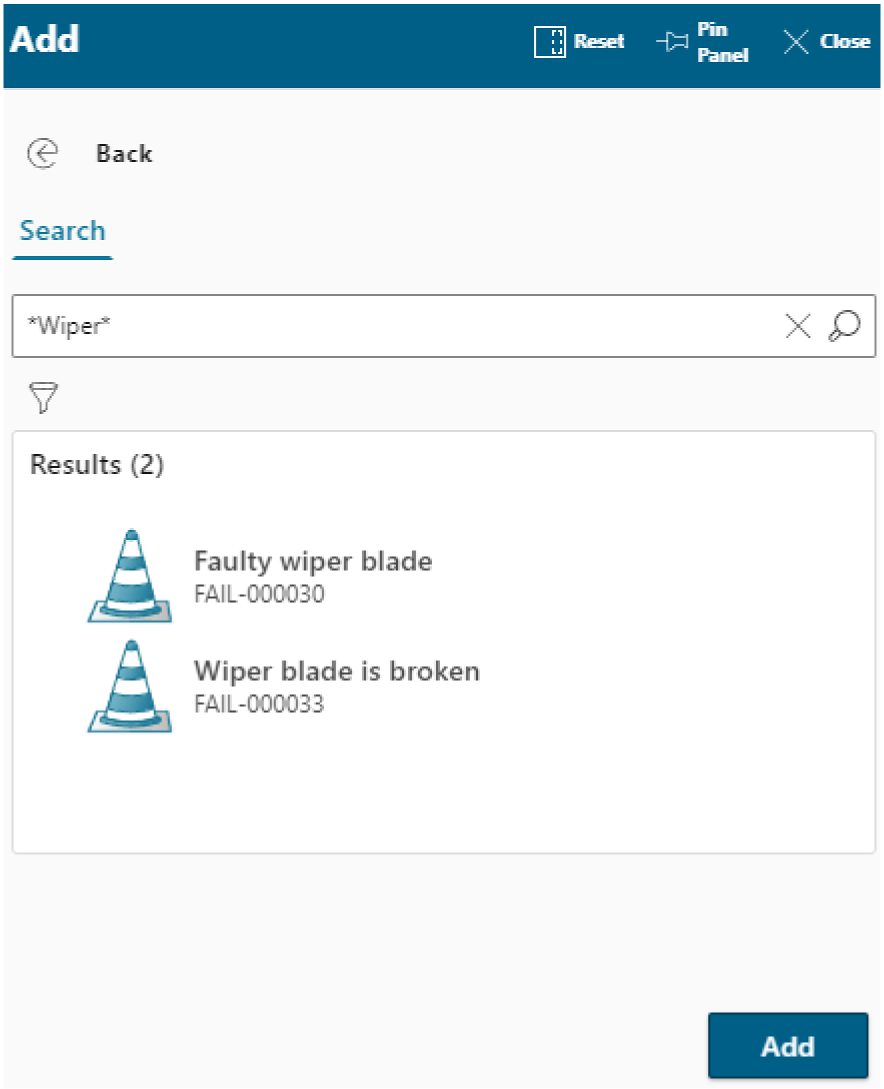



6. Enter the remaining properties.

7. To add the required failure, do the following:

   a. In the **Failure** section, click **Add Failure** ⊕.

   b. In the **Add** panel, search for and select the required failure.




   c. To remove a failure, select it and click **Remove Failure** ⊖.

   d. To add the selected failure, click **Add**.

8. Click **Add**.

9. Repeat the above steps until you add all the required symptom defects.

## Edit a symptom defect

1. From the **CHANGES** folder, select and open the required issue.
2. Click the **Symptom Description** tab.
3. Select and open the symptom defect that you want to edit.
4. Choose **More Commands** ••• > **Edit** > **Start Edit**, and make the required updates.

   You can also click **Information** to view the symptom defect details and edit them.
5. From the **Evaluation** list, select the current status of the symptom defect. Select one of the following:

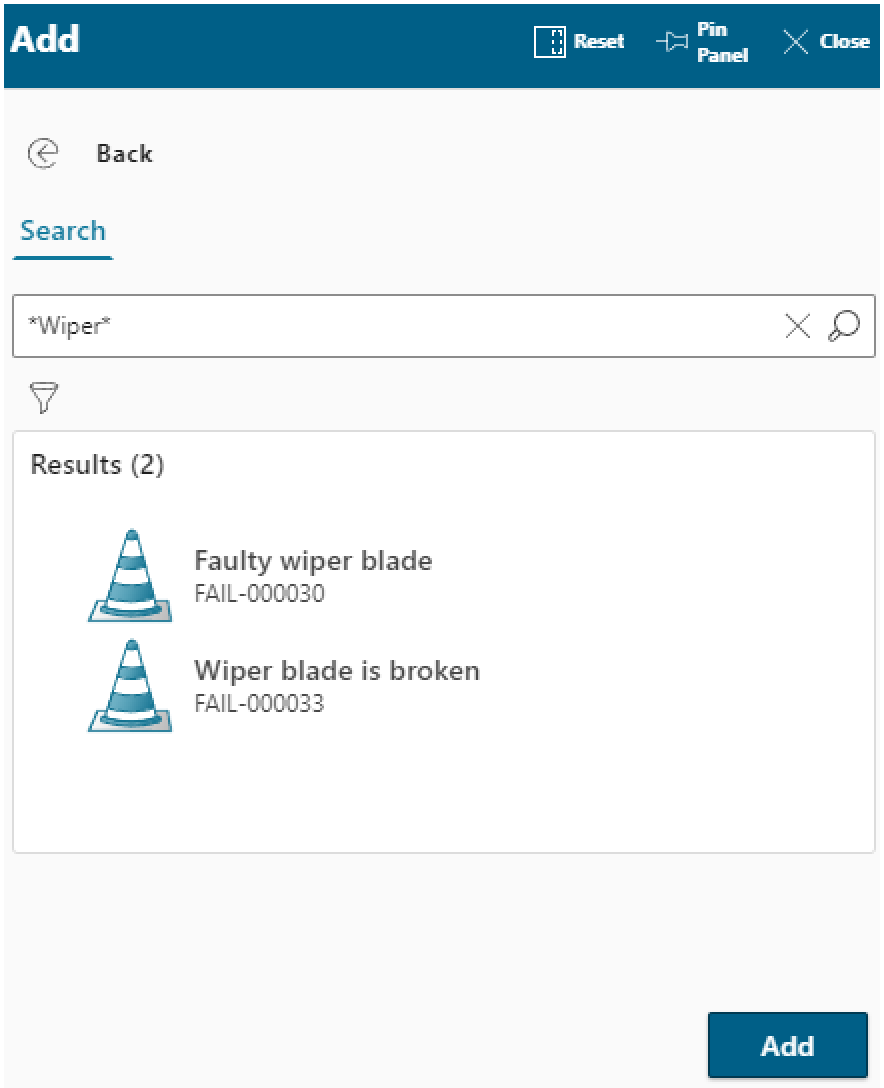
   - **Draft**: Indicates that the defect is created.
   - **Investigating**: Indicates that the investigation is in progress to evaluate if the defect is valid.
   - **Confirmed**: Confirms that the defect is valid.
   - **Invalidated**: Confirms that the investigation has proven that the defect is invalid.

   After the analysis is done, you can use this property to indicate if the defect is valid or not.
6. Choose **More Commands** ••• > **Edit** > **Save Edits**.

## Link a symptom defect to a failure code from the failure catalog

If a failure is related to a symptom defect, you can attach it from the failure catalog. You can link only one failure to a symptom defect.

1. From the **CHANGES** folder, select and open the required issue.
2. Click the **Symptom Description** tab.
3. Select and open the symptom defect that you want to link to a failure code.
4. In the **Failure Code from Catalog** section, click **Add Failure** ⊕.
5. In the **Add** panel, search for and select the required failure, and click **Add**.




6. If you want to change the linked failure, you must replace the existing failure with another one from the catalog. Do the following:

   a. Select the existing failure and click **Replace**.

   b. In the **Add** panel, search for and select the required failure, and click **Add**.

## Link a symptom defect to a defective item

If a defective item is related to a symptom defect, you can attach it. You can link only one defective item to a symptom defect.

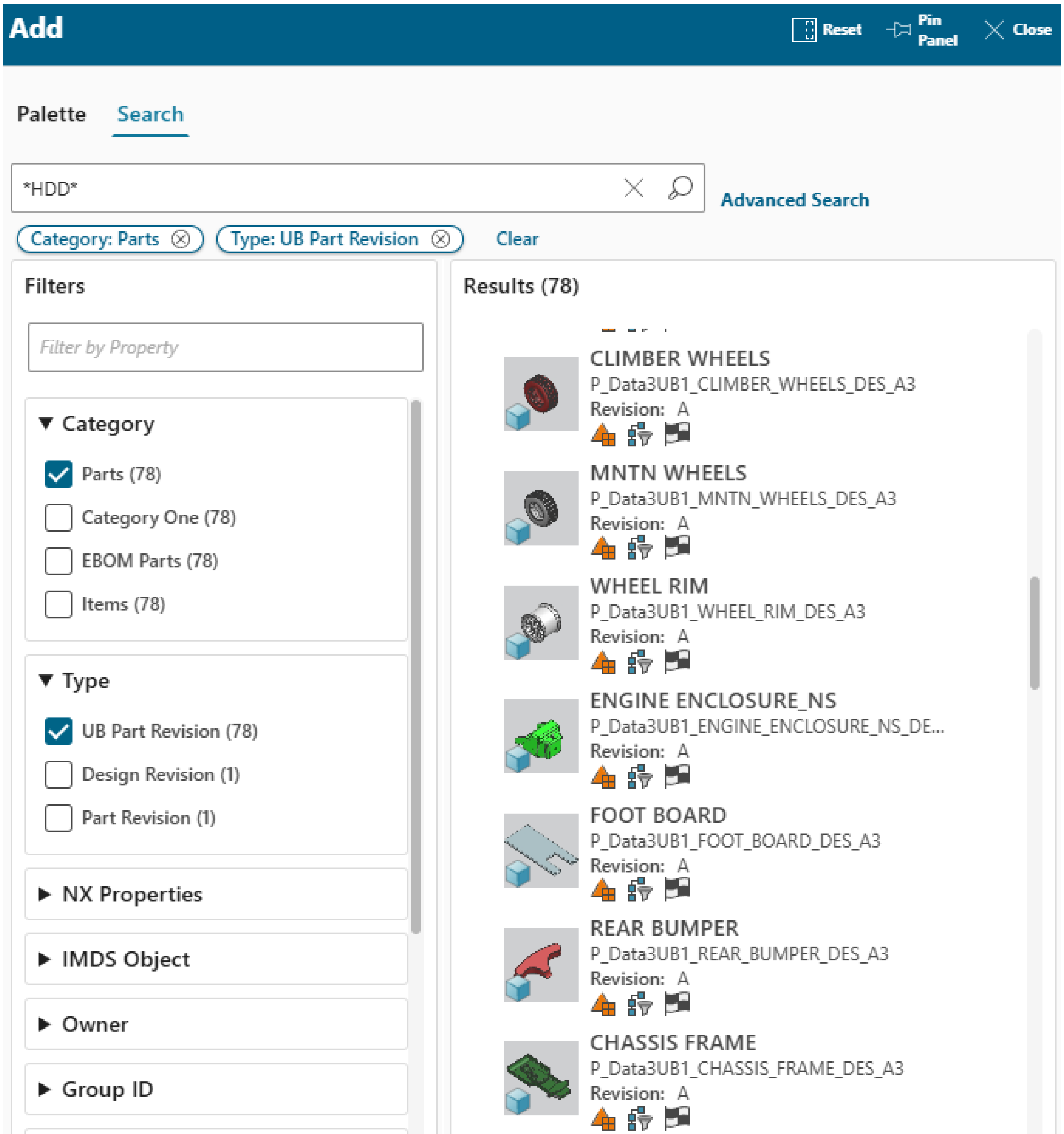
1. From the **CHANGES** folder, select and open the required issue.

2. Click the **Symptom Description** tab.

3. Select and open the symptom defect that you want to link to a defective item.

4. In the **Defective Item** section, click **Add** ⊕.

5. In the **Add** panel, search for and select the required defective item, and click **Add**.




6. If you want to change the linked defective item, you must replace the existing defective item with another one. Do the following:

a. Select the existing defective item and click **Replace** ⇄.

b. In the **Add** panel, search for and select the required defective item, and click **Add**.

## Add attachments to a symptom defect

You can attach many types of files to a symptom defect to aid in recording the observed symptoms. You can attach any type of Teamcenter object that is in the Teamcenter database. For example, you can attach an item revision of a part or a drawing. You can choose how to relate it, including adding it as the item that represents the symptom of the issue.

1. From the **CHANGES** folder, select and open the required issue.

2. Click the **Symptom Description** tab.

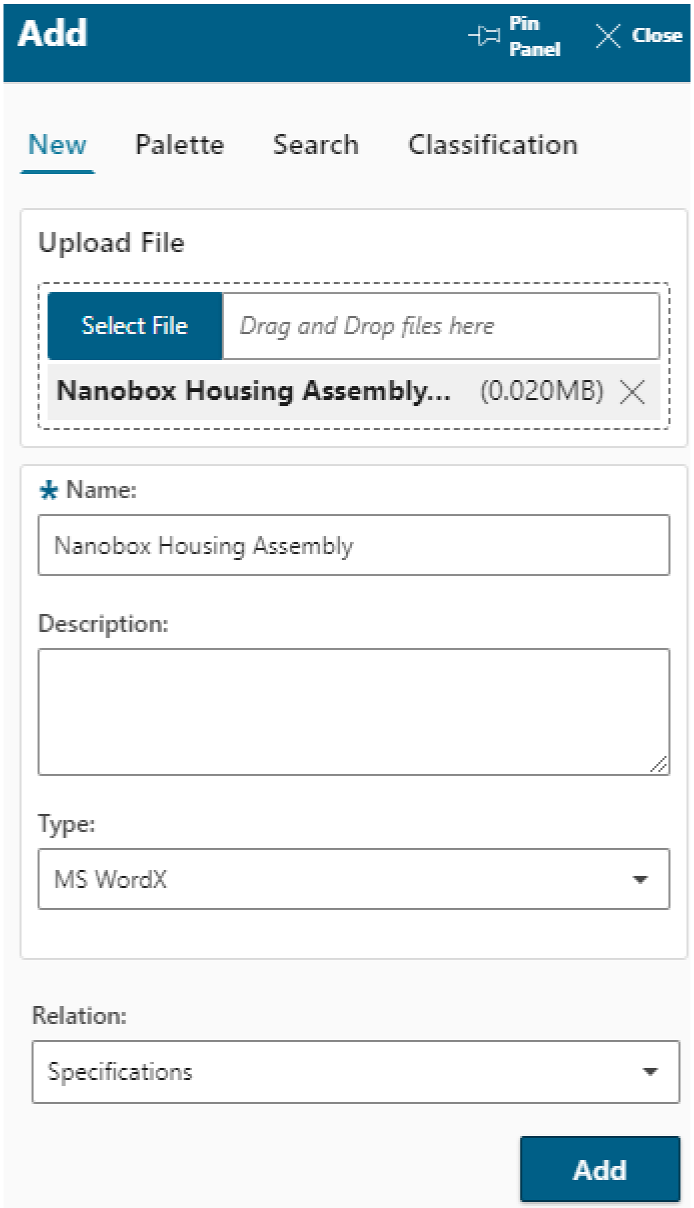
3. Select and open the required symptom defect.

4. Click the **Attachments** tab.

5. To add an attachment to the symptom defect, do the following:

   a. In the **Files** section, click **Add to** ⊕.

   b. In the **Add** panel, click **Select File** to browse to and select the required file, and click **Add**.




6. To replace an attachment, do the following:

   a. In the **Files** section, select the file to be replaced.

   b. Choose **More Commands** ••• > **Edit** > **Replace File**.

   c. In the **Replace** panel, click **Select File** to browse and select the required file, and click **Replace**.

7. To delete an attachment, do the following:

   a. In the **Files** section, select the files to be deleted.

   b. Choose **More Commands** ••• > **Edit** > **Delete**.

   c. In the confirmation message, click **Delete**.

## Add quality actions to a symptom defect

You can add the required quality actions associated with a symptom defect.

1. From the **CHANGES** folder, select and open the required issue.

2. Click the **Symptom Description** tab.

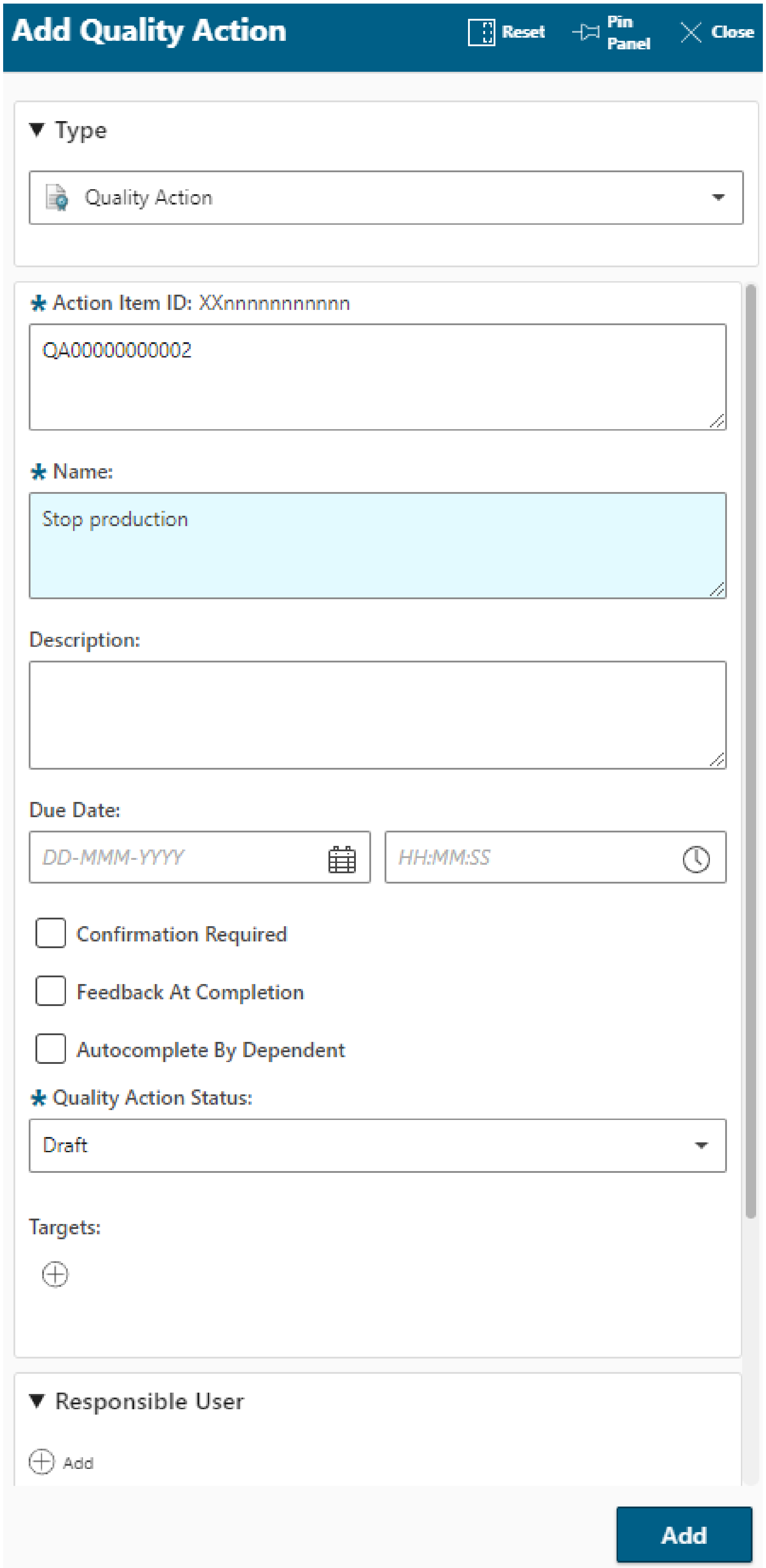
3. Select and open the symptom defect where you want to add quality actions, and do the following:

   a. Click the **Quality Action** tab.

   b. From the work area toolbar, click **Add to** ⊕ and click one of the following:

      - Click **Add Quality Action** to create a new quality action as follows:

         A. In the **Add Quality Action** panel, specify a name for the quality action and optionally enter a description.


Add Quality Action
Reset
Pin Panel
Close
Type
Quality Action
Action Item ID: XXnnnnnnnnnn
QA00000000002
Name:
Stop production
Description:
Due Date:
DD-MMM-YYYY
HH:MM:SS
Confirmation Required
Feedback At Completion
Autocomplete By Dependent
Quality Action Status:
Draft
Targets:
Responsible User
Add
Add

B. (Optional) Specify a due date and select other options as appropriate.

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

D. In the **Responsible User** section, click **Add Responsible User** and do the following.

   i. In the **Add Responsible User** panel, type a name or title to filter the list of users.

   ii. Select the required team member and click **Add**.

E. In the **Targets** box, click **Add** ⊕ to add targets to the quality action.

F. (Optional) Select **Confirmation Required** to make the responsible user confirm the action.

G. (Optional) Select **Feedback At Completion** to collate feedback from the responsible user after implementing the quality action.

H. Select the **Autocomplete By Dependent** check box if dependent quality actions can close the parent quality action.

   Selecting this check box allows you to avoid performing the manual step of closing the parent quality action.

I. In the **Projects** section, click **Add Project** and do the following.

   i. In the **Add Project** panel, type the name of a project to filter the list of projects.

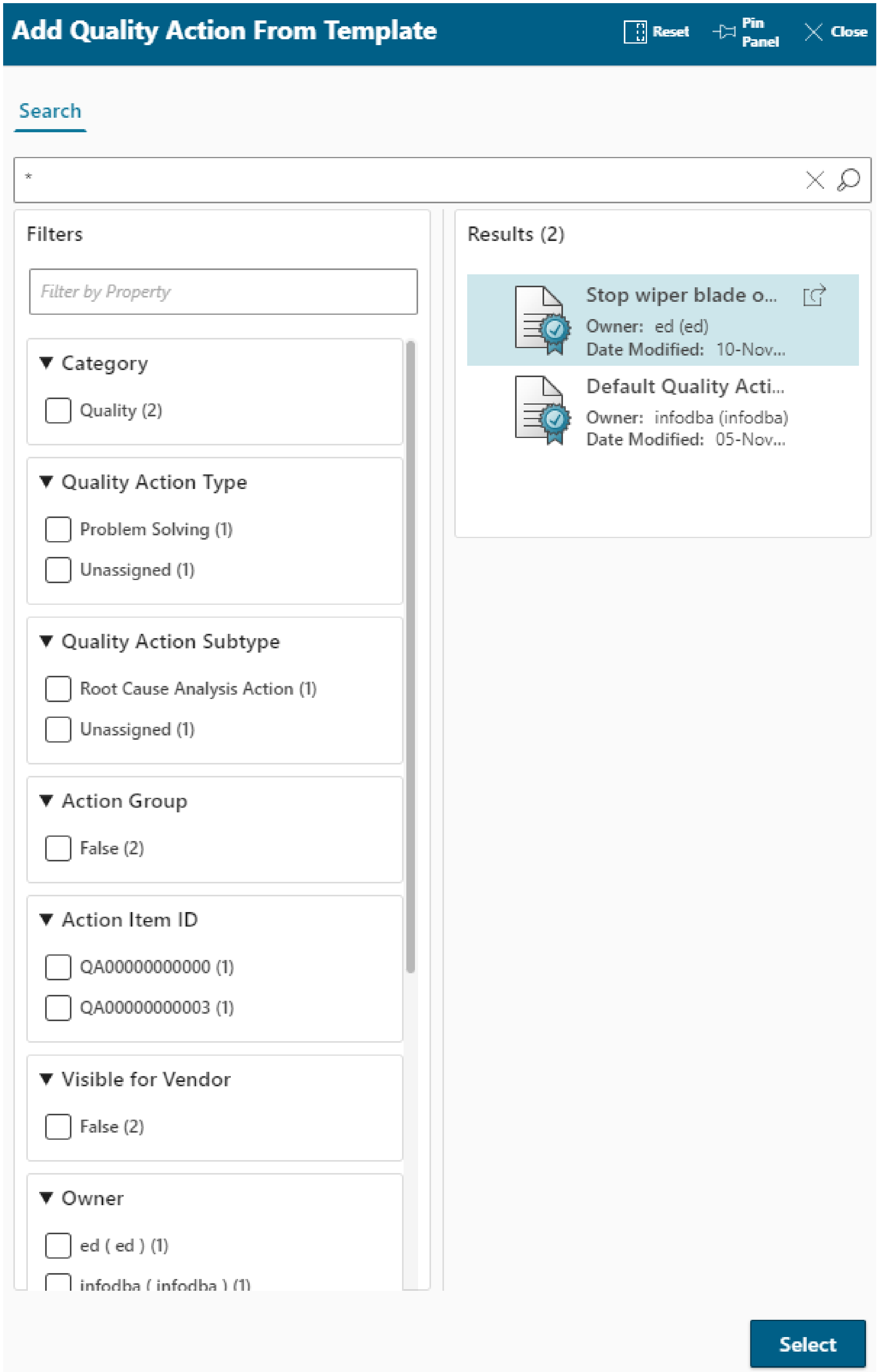
   ii. Select the required projects, and click **Assign**.

      The quality action is assigned to the selected projects.

J. To create the quality action, click **Add**.

- Click **Add Quality Action from Template** to create a new quality action from a template as follows.

  A. In the **Add Quality Action From Template** panel, specify the filter criteria in the **Filters** box.



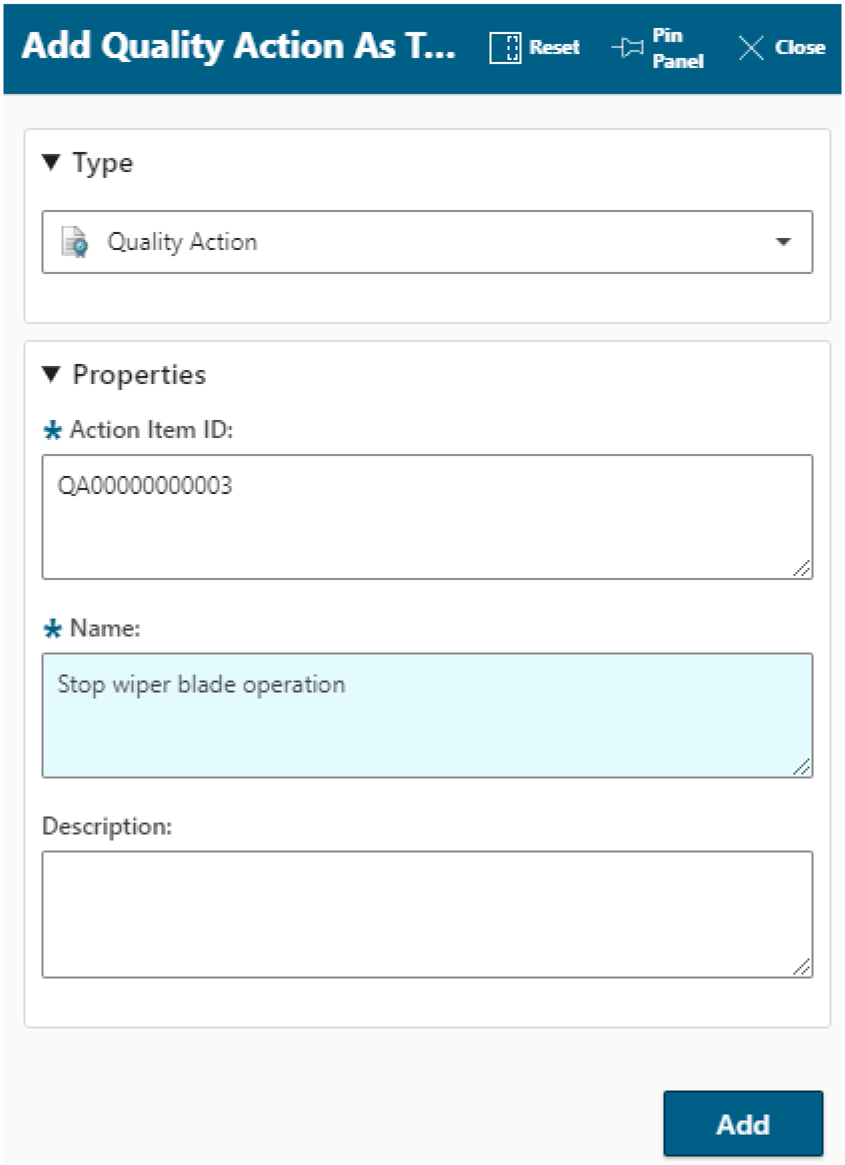
Add Quality Action From Template
Reset
Pin Panel
Close
Search
*
Filters
Filter by Property
Category
Quality (2)
Quality Action Type
Problem Solving (1)
Unassigned (1)
Quality Action Subtype
Root Cause Analysis Action (1)
Unassigned (1)
Action Group
False (2)
Action Item ID
QA00000000000 (1)
QA00000000003 (1)
Visible for Vendor
False (2)
Owner
ed ( ed ) (1)
infodba ( infodba ) (1)
Results (2)
Stop wiper blade o...
Owner: ed (ed)
Date Modified: 10-Nov...
Default Quality Acti...
Owner: infodba (infodba)
Date Modified: 05-Nov...
Select

B. Select the required template in the **Results** section, and click **Select** to specify the details.

C. In the **Add Quality Action From Template** panel, specify the required information to create the quality action.

- Click **Add Quality Action as a Template** to create a new quality action and set it as a template as follows:

A. In the **Add Quality Action As A Template** panel, specify a name for the quality action and optionally enter a description.




B. Click **Add**.

4. After adding the required quality actions, you can assign responsible users as follows:

    a. Select the required quality actions and click **Assign Responsible User**.

    b. In the **Assign Responsible User** panel, type a name or title to filter the list of users.

    c. Select the required team member and click **Assign**.

## Delete a symptom defect

While performing your analysis, you might find that a symptom defect is not relevant to the issue. In such a case, you can delete the symptom defect.

1. From the **CHANGES** folder, select and open the required issue.

2. Click the **Symptom Description** tab.

3. Select the symptom defect that you want to delete, and choose **More Commands** ••• > **Edit** > **Delete**.

4. In the confirmation message, click **Delete**.

# 8. Describe an issue in detail

You can add a variety of details to describe the issue. These details help to identify how to resolve the issue.

You can add the following details to an issue:

- Add the problem items that have resulted in the issue.
- Add the items that are affected by the issue.
- Add the internal and external links that provide supporting information about the issue.
- Add the reference items for the issue.

1. From the **CHANGES** folder, select and open the required issue.
2. Click the **Symptom Description** tab.
3. Add the associated objects to the issue.

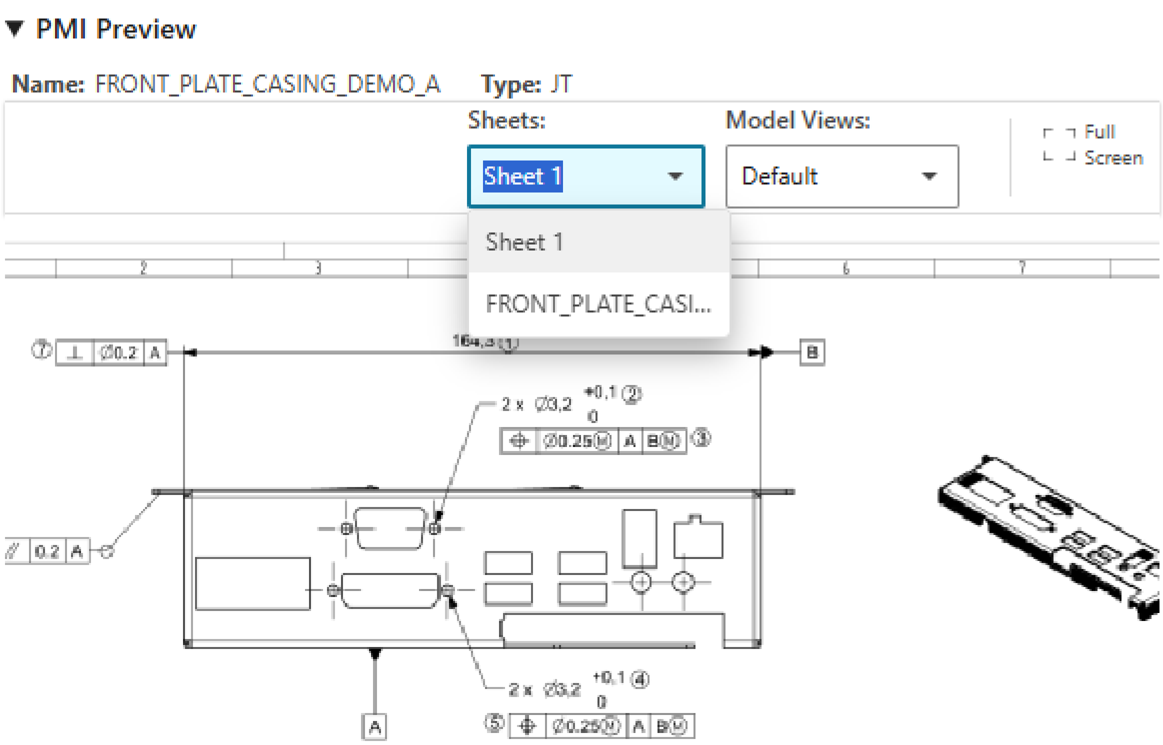
| To add this | Do the following |
|---|---|
| **Problem Items** | a. In the **Problem Items** section, click **Add to** ⊕ to add the problem items that are causing the issue.<br><br>b. In the **Add** panel, select the type of item and specify the required information to create the problem item.<br><br>You can also use the **Palette** tab or the **Search** tab to locate the required problem items.<br><br>c. Click **Add**. |
| **Affected Items** | a. In the **Affected Items** section, click **Add to** ⊕ to add the items that are affected by the issue.<br><br>b. In the **Add** panel, select the type of item and specify the required information to create the affected item.<br><br>You can also use the **Palette** tab or the **Search** tab to locate the required affected items.<br><br>c. Click **Add**. |

| To add this | Do the following |
|---|---|
| **Web Links** | a. In the **Web Links** section, click **Add to** ⊕ to add links to information available on an external site.<br><br>b. In the **Add** panel, select the type of link you want to add.<br><br>You can create a remote link to view the external element within Teamcenter. For example, you can create a link from an issue in Teamcenter to a software defect in the external application. Once this is done, you can view the software defect from Teamcenter.<br><br>Caution:<br><br>The administrator must install Linked Data Framework in the Teamcenter environment for you to be able to create a remote link. If Linked Data Framework is not installed, you can create only Web links.<br><br>You can create a Web link to provide quick access to information available on an external site.<br><br>c. If you chose to add a **Remote Link**, update the properties as follows:<br><br>A. Select the project from the **Project** list.<br><br>B. Click the **Existing** option.<br><br>C. To select a resource in the external application, click **Add** ⊕ next to the **Remote Reference** label.<br><br>Log on to the external application if prompted and select an existing resource in that application. This action takes you back to the **Add** panel.<br><br>D. From the **Relation** list, select the relation you want to create between Teamcenter and the external element.<br><br>Note:<br><br>If only one relation is applicable, this relation is used automatically. Manual selection is not required.<br><br>E. Click **Add** to create the link. |

| To add this | Do the following |
|---|---|
| | d. If you chose to add a **Web Link**, specify the name of the link in the **Name** box and the required URL in the **URL** box, and then click the **Add** button. |
| **Reference Items** | a. In the **Reference Items** section, click **Add to** ⊕ to add the reference items that provide more information about the issue.<br><br>b. In the **Add** panel, select the type of item and specify the required information to create the reference item.<br><br>You can also use the **Palette** tab or the **Search** tab to locate the required reference items.<br><br>c. Click **Add**. |

In the **PMI Preview** section, you can view associated part drawings of the Inspection Definitions added to the issue as problem items, affected items, or reference items. To work with the part drawings in the **PMI Preview** section, you can use the following options:

- If the part has multiple sheets, you can select the required sheet from the list of sheets.




- From the **Model Views** list, select the type of view for the part. The view of the part is positioned to the selected view. The different views allow you to easily identify which section of the part is associated with a specific balloon. This is especially helpful when the part has multiple balloons that cover the geometry of the part, and you need to view only a specific section.

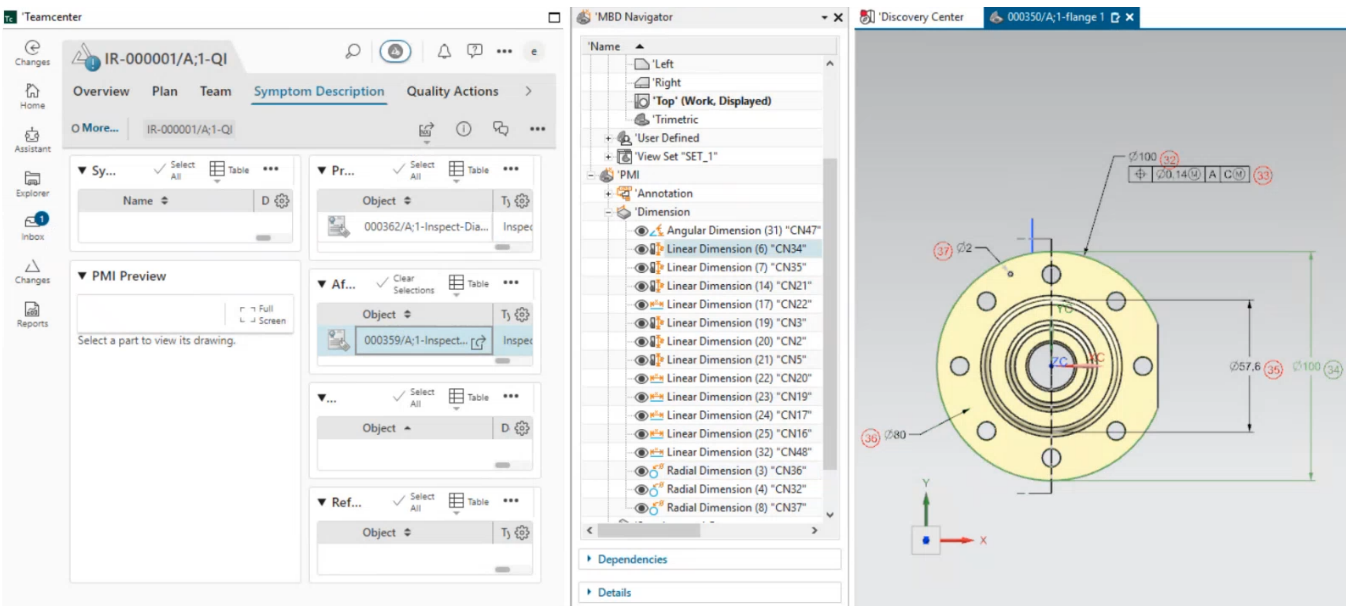

- Use the roller on your mouse to zoom in and out of the part drawing. Hold the **Ctrl** key and drag with the left mouse button to move the drawing in the work area.

> Note:
>
> To do this, the administrator must install Control Plan. For more information, see *Control Plan* and *Teamcenter Quality —Deployment and Administration* in the Teamcenter documentation.

# 9. Cross-probing of Quality Issues PMI in Active Workspace embedded in NX

When working on an issue in **Active Workspace** embedded in NX, you can cross-probe between the PMI in the graphics window in NX, the **Model-Based Definition (MBD) Navigator** in NX, and the Inspection Definitions added as problem items, affected items, and reference items in the **Symptom Description** tab of an issue. With cross-probing, you can select an object in one application, resulting in the corresponding object being selected in other applications. When you select an Inspection Definition, its corresponding dimension is highlighted in the graphics window, which allows you to identify the dimension related to the Inspection Definition.

If you select a single or multiple Inspection Definitions in the issue, the corresponding PMI objects are highlighted in the graphics window and the **MBD Navigator**. Also, if you select a single or multiple PMI objects in the graphics window or **MBD Navigator**, the corresponding Inspection Definitions are highlighted in the issue. If you clear any selections, the corresponding selections are also cleared.



# 10. Define the issue's containment actions

An action plan for an issue is made up of a combination of containment actions. For example, consider the following problem: The car wiper is not working. The containment actions to resolve this problem are to stop all wiper assembly operations and stop the production of cars. After creating an issue, you can define the interim containment actions that must be performed to resolve the issue.

1. From the **CHANGES** folder, select and open the required issue.

2. Click the **Quality Actions** tab.

3. In the **Quality Actions** tab, click **Add to** ⊕ and click one of the following:

   - **Add Quality Action to create a new quality action.**

   - **Add Quality Action from Template to create a new quality action from a template.**

   - **Add Quality Action as a Template to create a new quality action and set it as a template.**

   For more information, see *Quality Actions* in the Teamcenter documentation.

4. After adding the required quality actions, you can assign responsible users as follows:

   a. Select the required quality actions and click **Assign Responsible User**.

   b. In the **Assign Responsible User** panel, type a name or title to filter the list of users.

   c. Select the required team member and click **Add**.

# 11. Add a thumbnail image and attachments to an issue

You can attach many types of files to an issue to provide supporting information about the issue. You can also attach any type of Teamcenter object that is in the Teamcenter database. For example, you can attach an item revision of a part or a drawing. You can choose how to relate it, including adding it as the item that contains the problem being investigated or as the solution.

Additionally, you can also add a thumbnail image to display a preview of the issue. This image appears next to the name of the issue in the list of issues displayed in the **Changes** tab. It replaces the default issue icon displayed next to issues that do not have a thumbnail image. You can add only one thumbnail image to an issue.

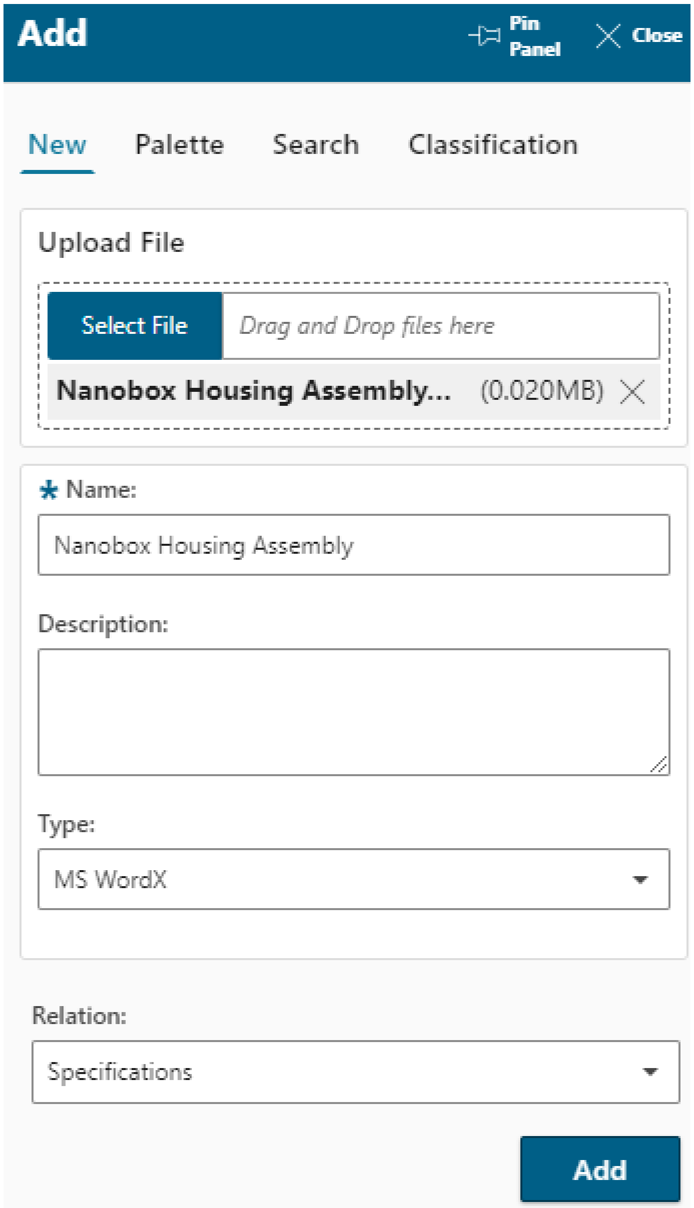
1. From the **CHANGES** folder, select and open the issue that you want to edit.

2. Click the **Attachments** tab.

3. To add an attachment to the issue, do the following:

    a. In the **Files** section, click **Add to**.

    b. In the **Add** panel, click **Select File** to browse to and select the required file, and click **Add**.




4. To replace an attachment, do the following:

    a. In the **Files** section, select the file to be replaced.

    b. Choose **More Commands •••** > **Edit** > **Replace File**.

    c. In the **Replace** panel, click **Select File** to browse to and select the required file, and click **Replace**.

5. To delete an attachment, do the following:

    a. In the **Files** section, select the files to be deleted.

b. Choose **More Commands ••• > Edit > Delete**.

c. In the confirmation message, click **Delete**.

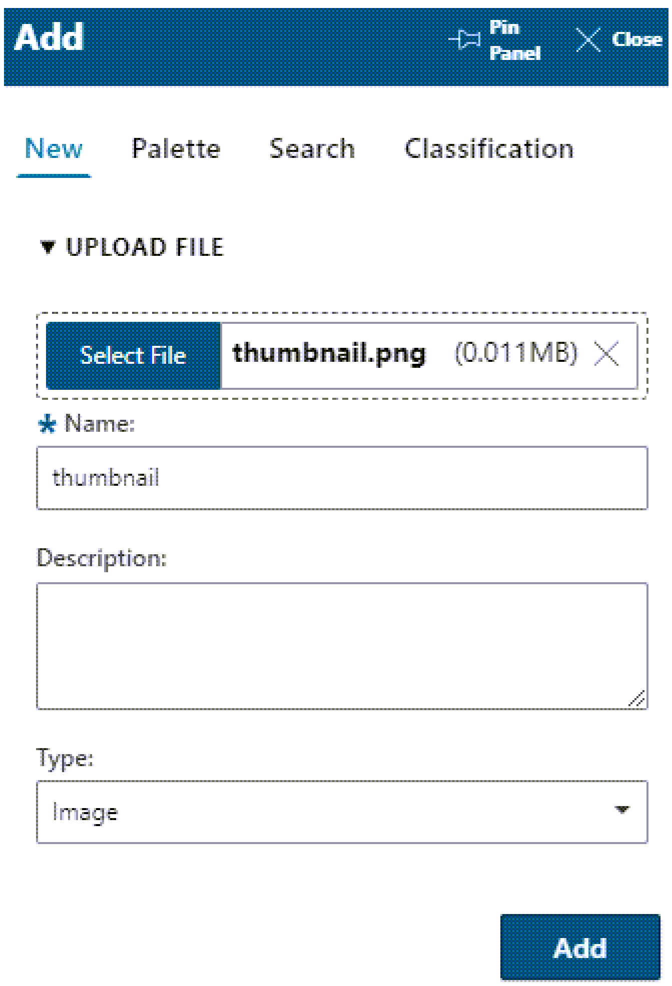
6. To add a thumbnail image to the issue, do the following:

a. You can copy and paste or drag-and-drop an image from the **Files** section.

b. To add a new image as a thumbnail, do the following:

A. In the **Thumbnail** section, click **Add to** ⊕.

B. In the **Add** panel, click **Select File** to browse to and select the required file, and click **Add**.




7. To replace a thumbnail, do the following:

a. In the **Thumbnail** section, select the file to be replaced.

   b. Choose **More Commands** ••• > **Edit** > **Replace File**.

   c. In the **Replace** panel, click **Select File** to browse to and select the required file, and click **Replace**.

8. To delete a thumbnail, do the following:

   a. In the **Thumbnail** section, select the thumbnail.

   b. Choose **More Commands** ••• > **Edit** > **Delete**.

   c. In the confirmation message, click **Delete**.

9. To capture the images related to the issue in Teamcenter Lifecycle Visualization, choose **Open** > **Open in Visualization**.

   This allows you to capture the related images and attach them to the issue in the **Available Issue Images** and **Available Issue Fixed Images** tables.

   > Note:
   >
   > The administrator must install Teamcenter Lifecycle Visualization in your Teamcenter environment before you use the **Open in Visualization** command.

10. To capture the images related to the issue in NX, choose **Open** > **Open in NX**.

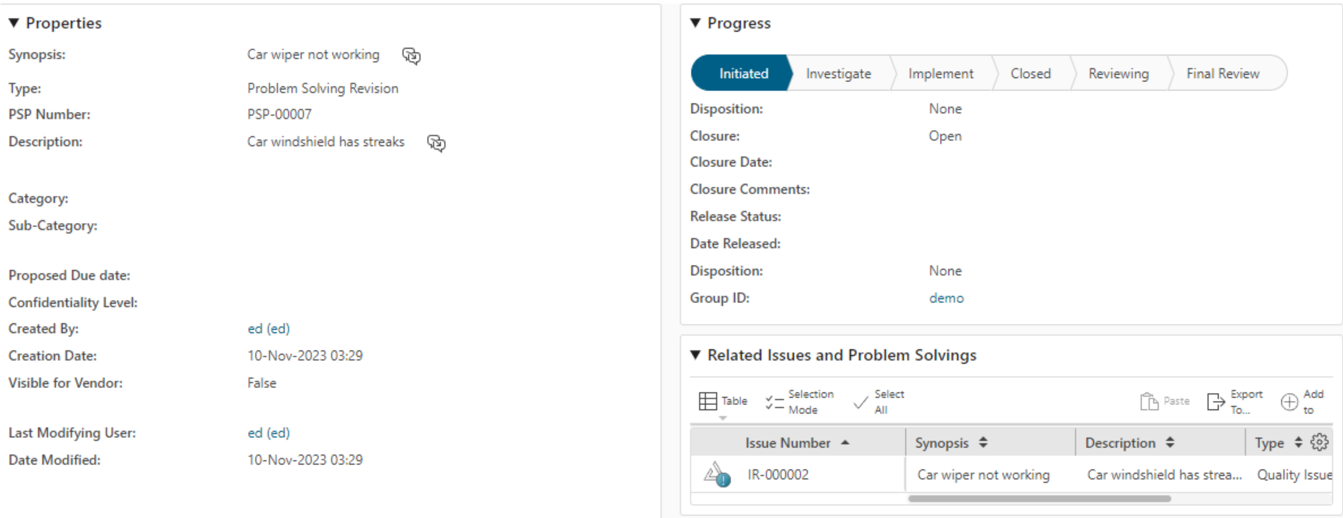
    This allows you to capture the related images and attach them to the issue in the **Available Issue Images** and **Available Issue Fixed Images** tables.

    > Note:
    >
    > The administrator must install Teamcenter NX in your Teamcenter environment before you use the **Open in NX** command.

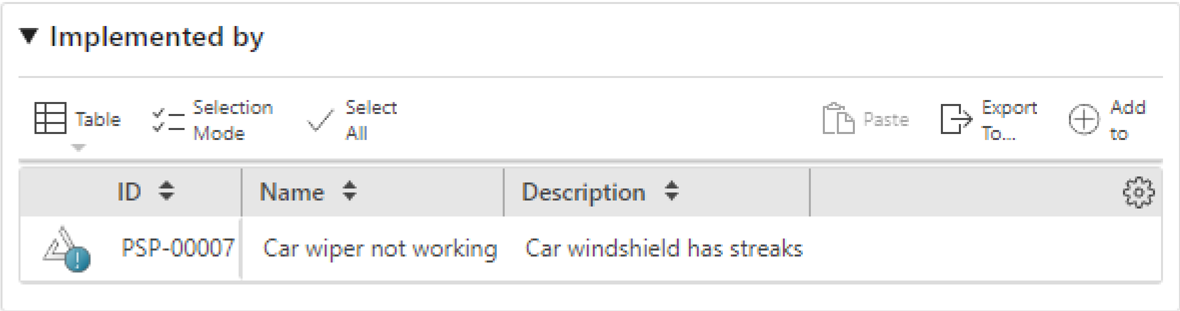
# 12. Derive a Problem Solving process from an issue

After you complete creating an issue, you can specify that the issue is the source of a Problem Solving process by deriving a Problem Solving process from the issue. This links the source issue to the implementing Problem Solving process.

You can view the link between the issue and the Problem Solving process because the source issue is added to the **Related Issues and Problem Solvings** section in the **Overview** tab of the Problem Solving process.




After deriving a Problem Solving process, in the **Overview** tab of the issue, the derived Problem Solving process is displayed in the **Implemented by** section.

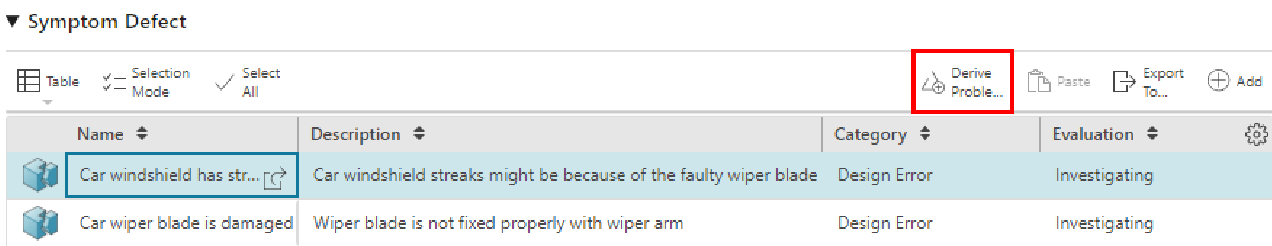



1. From the **CHANGES** folder, select and open the issue that you want to use as the source of the Problem Solving process.

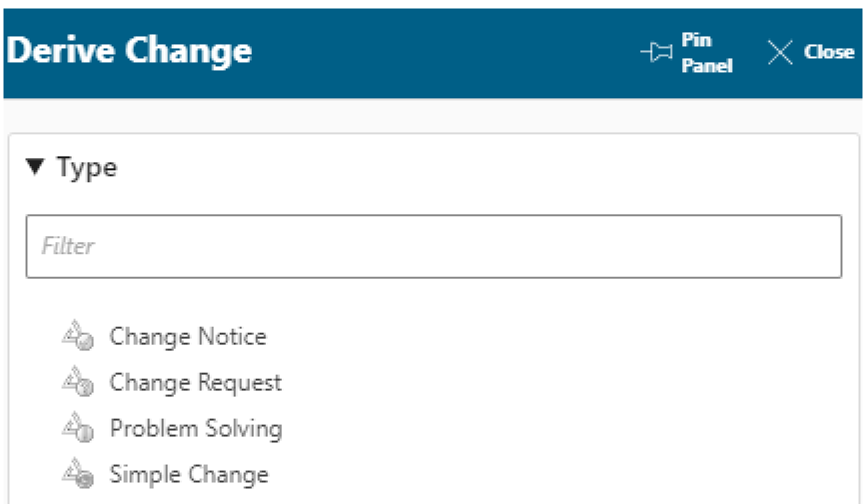
2. Choose **More Commands** ••• > **New** > **Derive Change**.

To derive a Problem Solving process for a specific symptom defect, in the **Symptom Description** tab, select the defect, and click **Derive Problem Solving Process**.

> Note:
>
> When you do this, the symptom defect is automatically added to the **Defect** section.

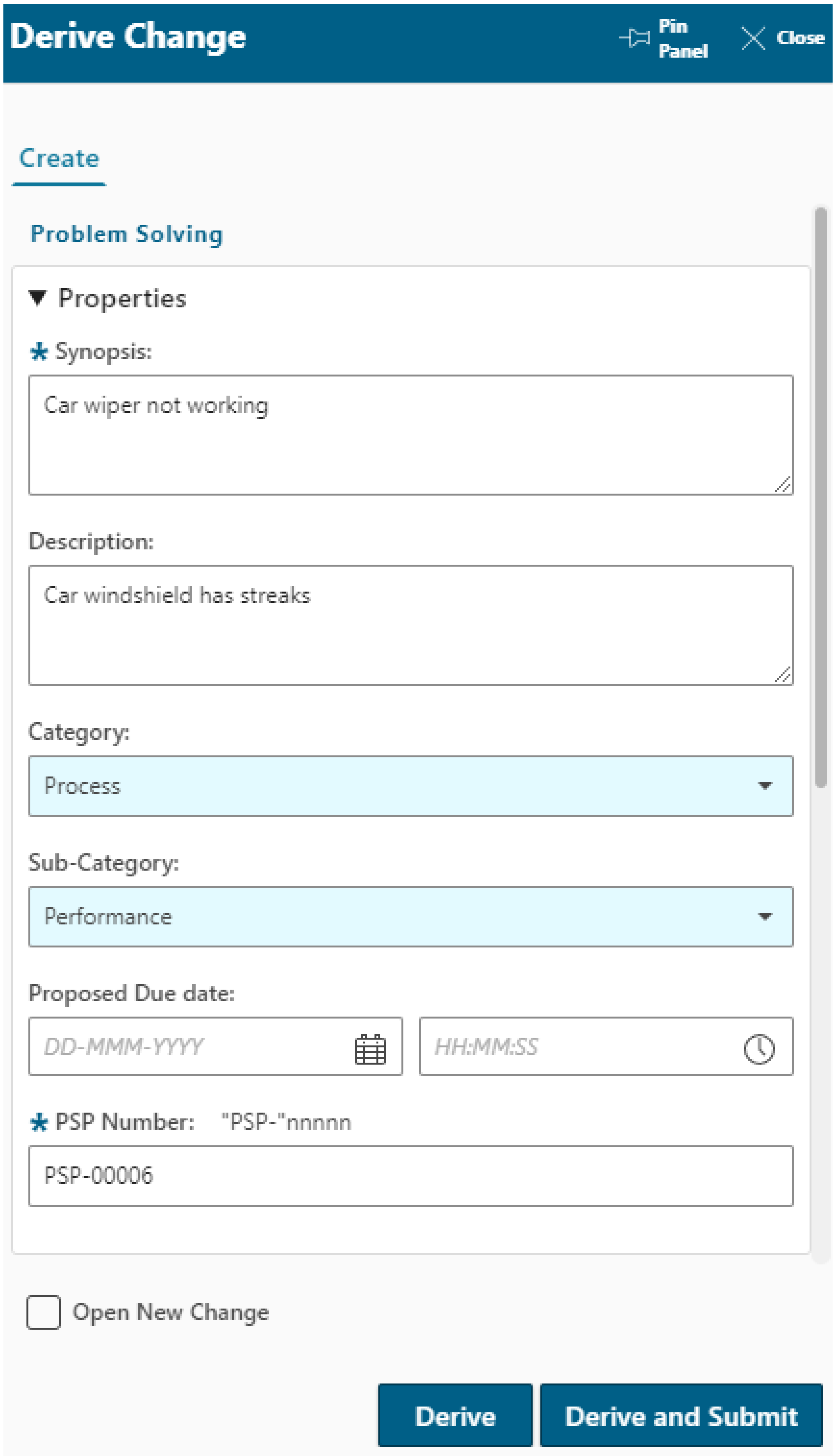



3. In the **Derive Change** panel, select **Problem Solving**.




4. In the **Synopsis** box, summarize the Problem Solving process.

5. In the **Description** box, describe the Problem Solving process.




6. From the **Category** list, select the appropriate category.

7. From the **Sub-Category** list, select the appropriate subcategory.

8. Specify a proposed due date.

   Some companies use a standard operating procedure where an issue must be completed within a specific duration. This duration is based on the **Priority** of the issue. If your company has defined this standard operating procedure for you, you must specify a **Proposed Due Date** that matches the priority of the issue. For example, if the **Priority** is **High**, set the **Proposed Due Date** to 30 days and earlier from the **Creation Date** of the issue.

   Depending on the **Priority** of the issue, set the **Proposed Due Date** as follows:

| Priority | Duration assigned to Proposed Due Date |
|---|---|
| **High** | **Proposed Due Date** must be set to 30 days and earlier from the **Creation Date** |
| **Medium** | **Proposed Due Date** must be set to 45 days and earlier from the **Creation Date** |
| **Low** | **Proposed Due Date** must be set to 60 days and earlier from the **Creation Date** |

   Your administrator can configure the duration assigned to the **Proposed Due Date** as per the business requirements. If the **Proposed Due Date** is not automatically set to a duration based on the assigned **Priority**, the administrator has disabled this option for your company.

   > Note:
   >
   > The **Proposed Due Date** of the issue must not be later than the **Due Date** of the assigned quality actions.

9. (Optional) To add a symptom defect to the Problem Solving process being derived, do the following:

   a. In the **Defect** section, click **Add Defect**.

   b. To specify how the issue's symptom defect is used as the problem description defect in the Problem Solving process, select one of the following:

      - Select **Carryover** to link and use the issue's symptom defect as the problem description defect in the Problem Solving process. If you edit the defect in the Problem Solving process, the updates are reflected in the issue's symptom defect as well.

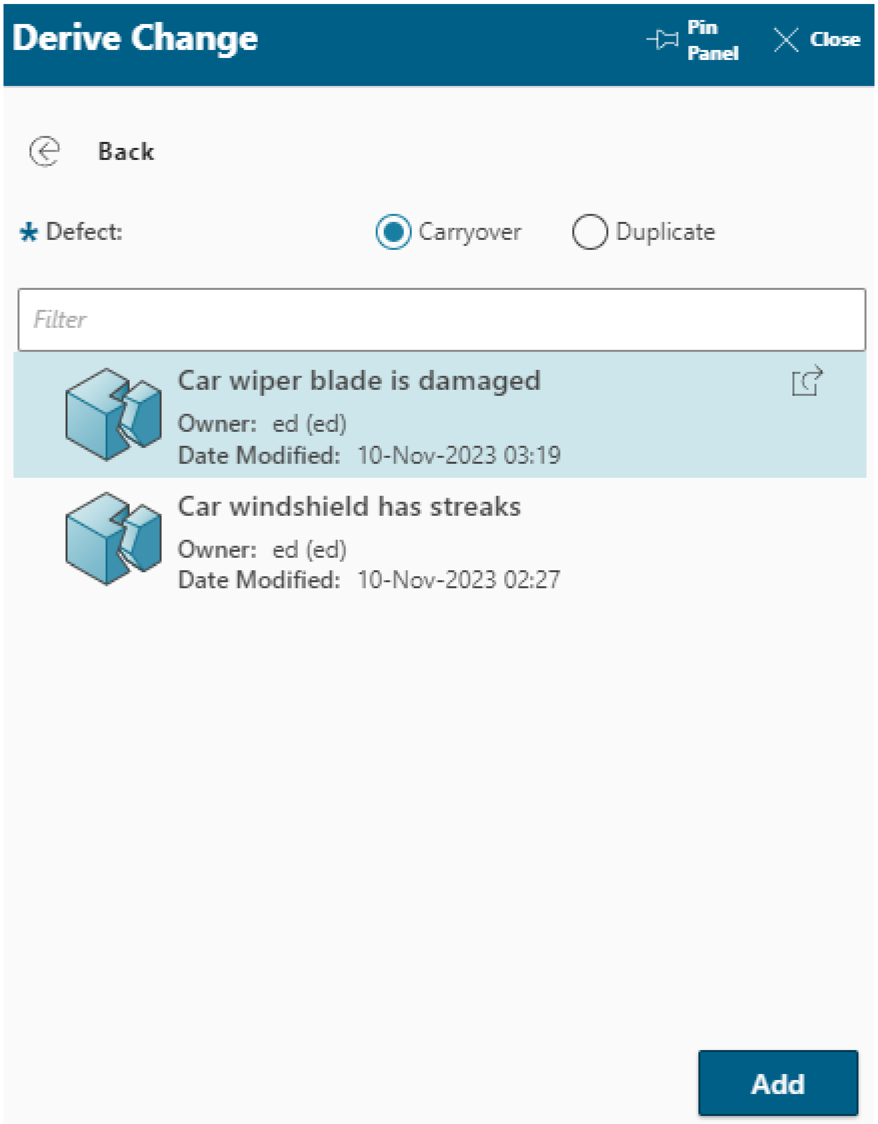
      - Select **Duplicate** to create a copy of the issue's symptom defect as the problem description defect in the Problem Solving process. If you edit the defect in the Problem Solving process, the updates are not reflected in the issue's symptom defect.

      The symptom defect's failures, attachments, and quality actions are transferred to the Problem Solving process.

Note:

You can add only one symptom defect at a time. If you have selected a symptom defect, and clicked **Derive Problem Solving Process**, then the selected symptom defect is automatically added to the **Defect** section.

c. In the **Add Defect** panel, select the required symptom defect, and click **Add**.




Note:

This panel displays only those symptom defects that are not already used as a source of a Problem Solving process. You can derive a Problem Solving process from a symptom defect only once. After you complete the derivation, the symptom defect is no longer available for derivation.

10. Do one of the following:

    - To continue editing later, click **Derive**.

      The Problem Solving process is derived and displayed in edit mode. You can send it for resolution later.

    - To send it for resolution immediately, click **Derive and Submit**.

      The Problem Solving process is derived and displayed in edit mode.

    Note:

    You can also derive an engineering change request (ECR), engineering change notice (ECN), or Simple Change from an issue.

# 13. Derive Problem Solving processes for each eligible symptom defect through a workflow

A symptom defect is a defect used to record a symptom of an issue.

Example:

You find an issue with the windshield wipers of a car. Some of the symptoms of this issue are:

- Streaks appear on the windshield.
- Wiper blades do not move smoothly when run.
- Wiper blades make a rattling sound when run.

For each of the above symptoms, you can create a symptom defect and add it to the issue of the car wipers not working.

After you create the symptom defects of an issue, you begin the process of investigating them. During the investigation, you conclude that you need to create a separate Problem Solving process for each symptom defect. These Problem Solving processes will help you to investigate the symptom defect in detail and to come up with the corrective actions to resolve the defect and the preventive actions to prevent further recurrences of the symptom defect.

Note:

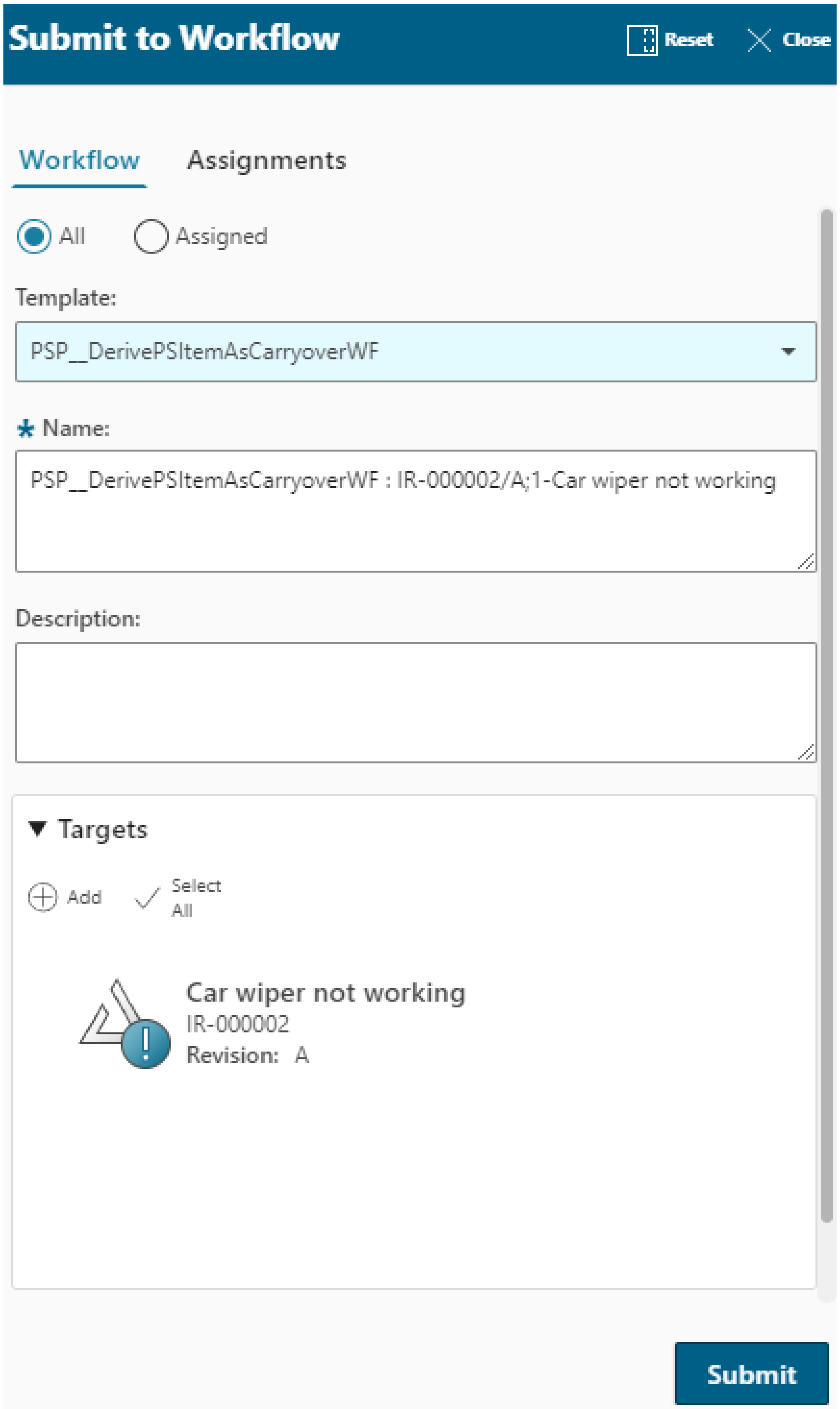
The symptom defect's **Evaluation** field must be set to **Investigating** before you submit the issue to the required workflow. Otherwise, the symptom defect is excluded from the workflow, and Problem Solving processes are created for the remaining defects.

1. From the **CHANGES** folder, select and open the issue that contains the symptom defects that require separate Problem Solving processes.
2. Choose **More Commands** ••• > **Manage** > **Submit to Workflow**.
3. In the **Submit to Workflow** panel:
    a. From the **Template** list, select one of the following:
        - Select **PSP__DerivePSItemAsDuplicateWF** to create a copy of the symptom defects as the problem description defects in the Problem Solving processes.

- Select **PSP__DerivePSItemAsCarryoverWF** to link the symptom defects as the problem description defects in the Problem Solving processes.

b. Accept the default workflow **Name** or type your own.

c. Enter a **Description** for the new workflow.



d. Click **Submit**.

Problem Solving processes are derived for all symptom defects where the **Evaluation** status is **Investigating**.

# 14. Manage an issue through a workflow

Your company’s business processes might require that you complete certain tasks at each stage of an issue. After completion, the tasks must be reviewed and approved before the assignees can proceed to the next stage. Reviewers can approve the tasks, or they can reject the tasks. They can also ask for more information or additional work to be done before approval.

Quality Issue provides workflows to ensure that the business processes are implemented correctly with the appropriate tasks and approvals at each stage. Workflows guide an issue through the different phases of the issue: authoring, review and approval, execution, and closure.

For more information about workflows, see *Workflow Designer for Active Workspace* in the Teamcenter documentation.

Quality Issue provides the following workflows:

| Workflow | Description |
|---|---|
| **Quality Issue Process** | Verifies that the issue is completed successfully through all the stages from creation to closure. When you complete a stage and receive approval, the next task or notification is automatically triggered to ensure that the issue moves to the next stage. |
| **Quality Issue Reopen Request** | Sends a notification to the assigned Issue Approvers to reopen a closed issue when the Issue Owner submits a closed issue to this workflow. If an Issue Approver approves the reopening, the workflow sends a notification to the issue creator that the issue is reopened for updates.<br><br>Note:<br><br>If an Issue Approver submits a closed issue to this workflow, the workflow automatically reopens the issue for updates. |

At each stage of the issue, the workflow updates the **Closure**, **Disposition**, and **Maturity** properties of the issue to indicate the progress. You cannot edit these properties. These properties are updated only by the workflow.

| Stage | Closure | Maturity | Disposition |
|---|---|---|---|
| Create an issue. | **Open** | **Initiated** | **None** |
| Establish the team. | **Open** | **Elaborating** | **None** |

| Stage | Closure | Maturity | Disposition |
|---|---|---|---|
| Define the symptom defects. | **Open** | **Reviewing** | **Investigate** |
| Create the containment actions. | **Open** | **Reviewing** | **Investigate** |
| Close the issue. | **Closed** | **Closed** | **Approved** |
| Cancel the issue. | **Cancelled** | **Rejected** | **Disapproved** |
| Put the issue on hold. | **Hold** | **Reviewing** | **Deferred** |

You can use the **Quality Issue Process** workflow as an end-to-end workflow to complete all the stages of an issue as follows:

## Procedure

1. As an issue creator, **create an issue**.

2. On the **Team** tab of the issue, **assign an Issue Owner**.

   Example:

   The creator assigns **ed** as the Issue Owner.

3. As an Issue Owner, open the issue and **assign an Issue Approver**.

   Example:

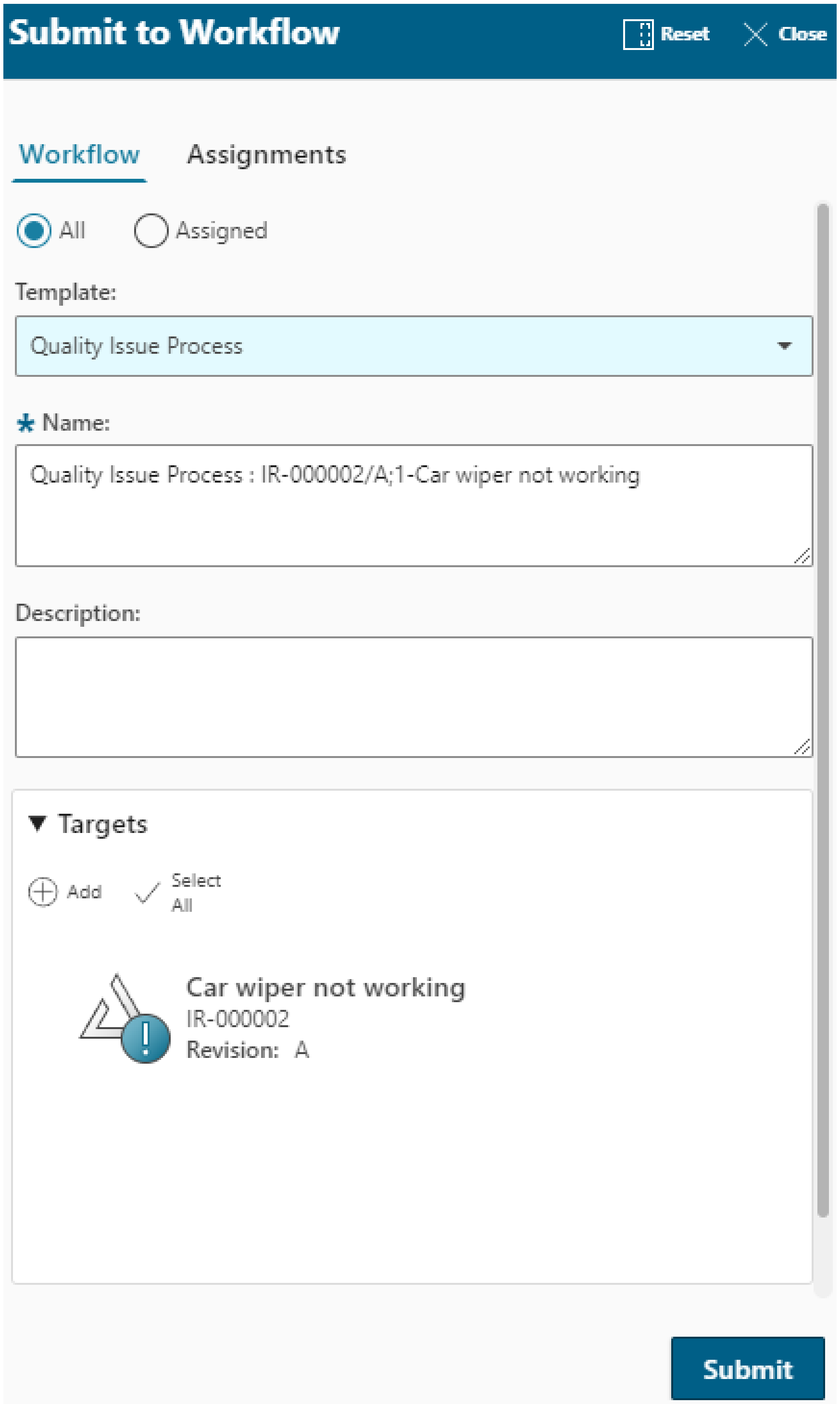
   The Issue Owner, **ed**, assigns **alice** as an Issue Approver.

4. Submit the issue to the **Quality Issue Process** workflow as follows:

   a. Choose **More Commands** ••• > **Manage** > **Submit to Workflow**.

   b. In the **Submit to Workflow** panel, select **Assigned** to view the available Quality Issue workflows.

   c. From the **Template** list, select **Quality Issue Process**.




d. Specify a **Name** or accept the default.

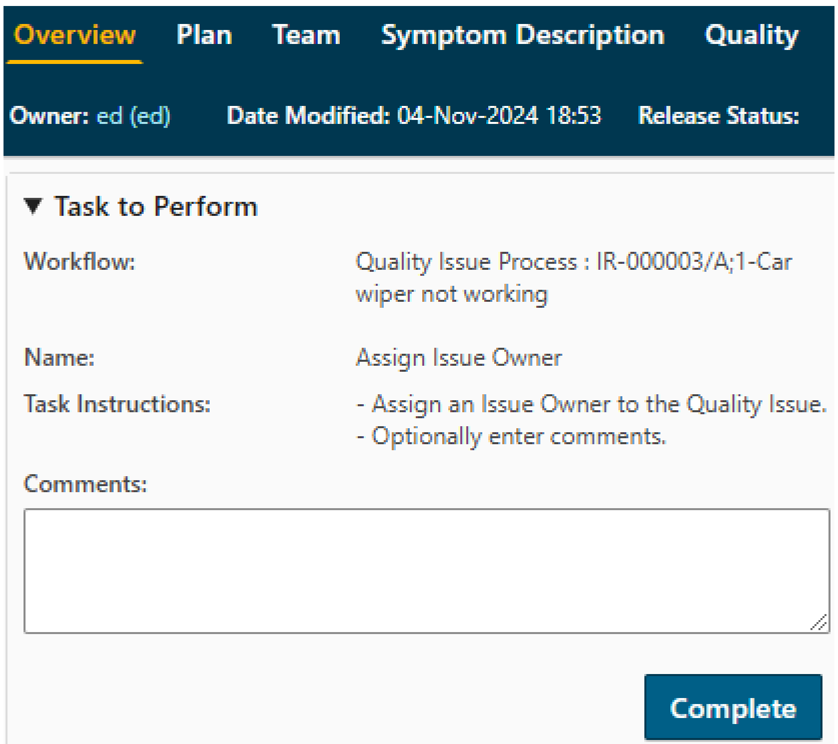
e. (Optional) Enter the **Description**.

f. Click **Submit**.

Example:

The workflow sends a notification to the Issue Owner, **ed**, to create the required symptom defects of the issue.

The workflow also adds the **Task to Perform** section in the **Overview** tab to track the progress of completing the tasks in the workflow. This section displays information about the next task to be performed in the workflow. As you progress through the various workflow tasks, this section displays information about the upcoming task.




5. As an Issue Owner, open the issue in the notification, create the required symptom defects of the issue, and set their **Evaluation** status to **Investigating**.

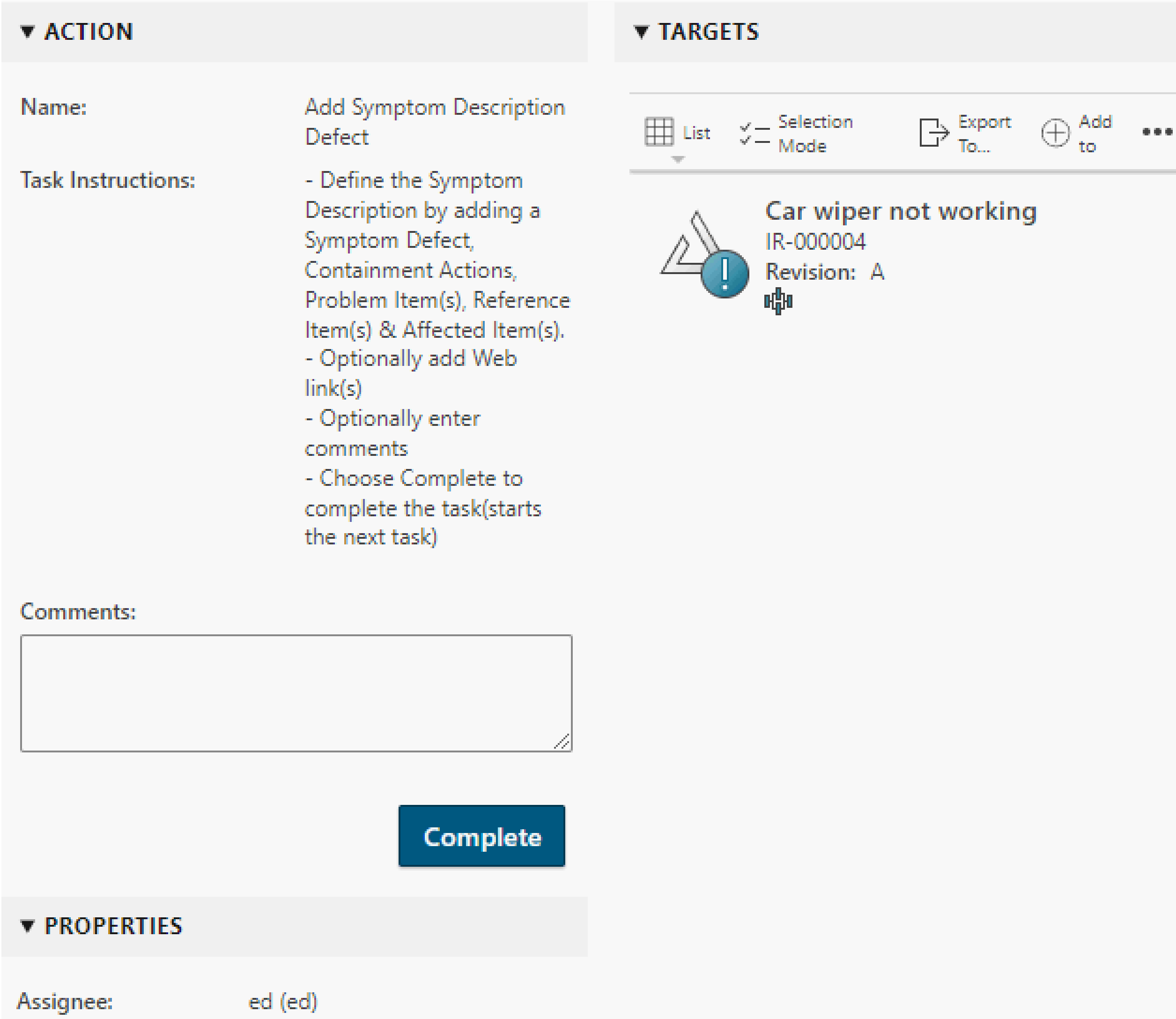
   Optionally, the Issue Owner can also add problem items, affected items, reference items, and internal and external links that provide supporting information to resolve the issue.

   Example:

   The Issue Owner, **ed**, opens the issue in the notification, creates the required symptom defects, and sets their **Evaluation** status to **Investigating**.

6. After creating the symptoms defects and setting their **Evaluation** status to **Investigating**, click **Complete** to mark the task as **Complete**.

   You can mark the task as **Complete** in the **INBOX** tile or in the **Workflow** tab of the issue.




The workflow sends a notification to the Issue Owner to review the issue and symptom defects, and verify the validity of the issue.

> Example:
>
> The workflow sends a notification to the Issue Owner, **ed**.

7. As an Issue Owner, review the issue and symptom defects and verify the validity of the issue as follows:

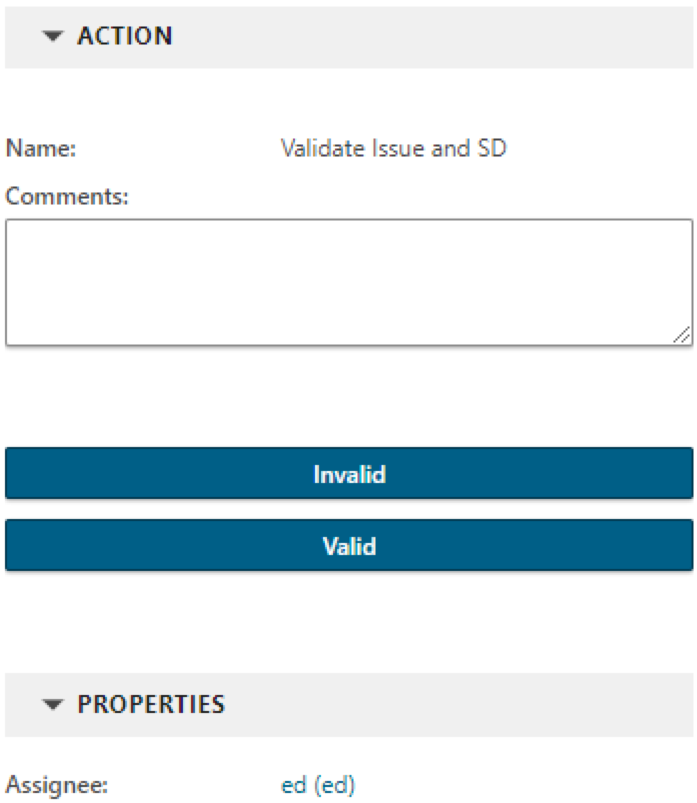
    a. In the **INBOX** tile, select the task for the issue.

       You can also verify the validity of the issue in the **Workflow** tab of the issue.

    b. On the **Overview** tab, under **Targets**, view the issue for review.

c. Under **Action**, provide your **Comments** related to the review task.

> Example:
>
> The Issue Owner, **ed**, reviews and verifies the validity of the issue.



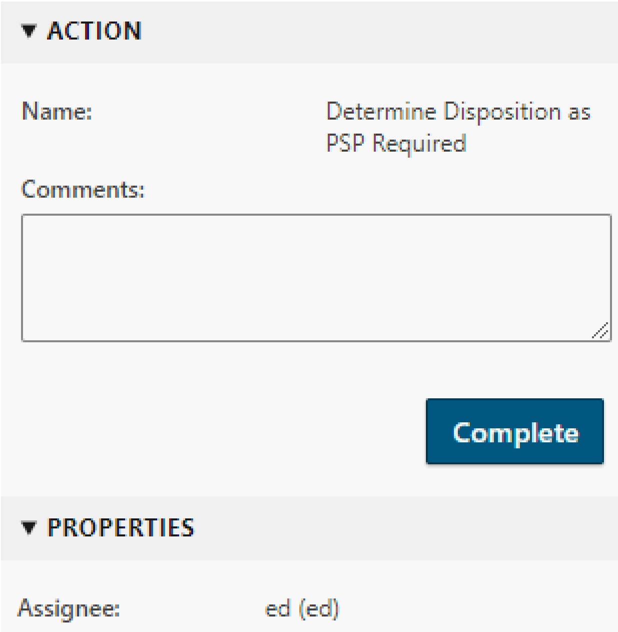

8. As an Issue Owner, to resolve the issue by deriving a Problem Solving process, do the following:

   a. Click **Valid** to determine if a Problem Solving process must be derived to resolve the issue.

      The workflow creates a task for the Issue Owner to determine if a Problem Solving process must be derived to resolve the issue.

   b. As an Issue Owner, if you decide to derive a Problem Solving process from the issue, open the assigned task, and click **Complete** to mark the task as **Complete** as follows:

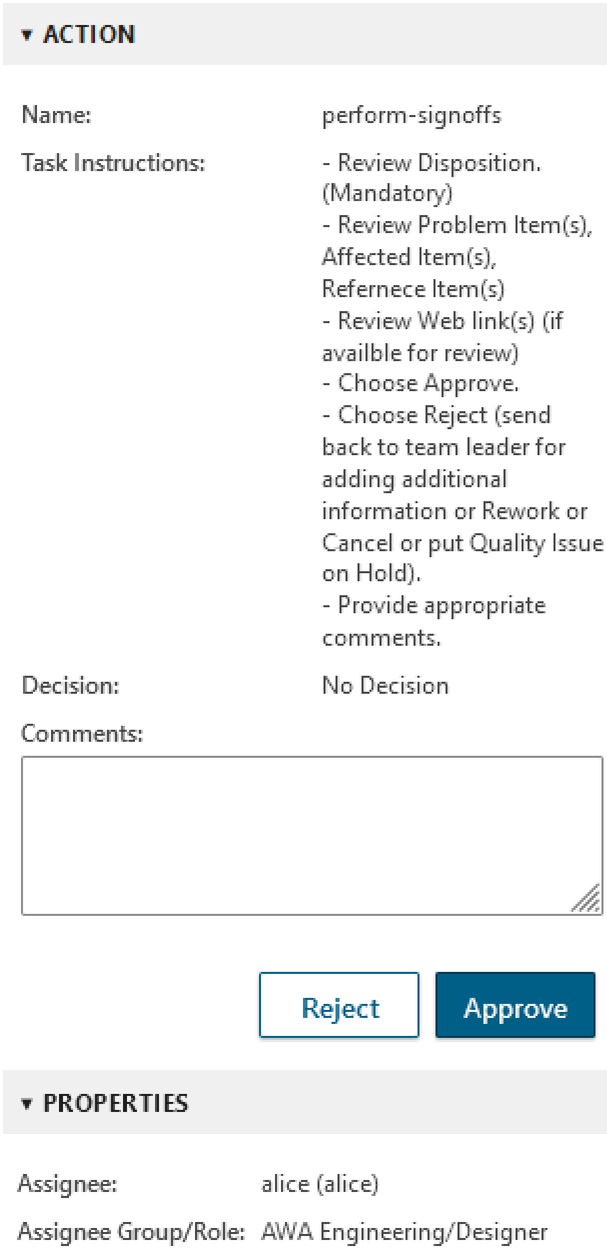
      You can mark the task as **Complete** in the **INBOX** tile or in the **Workflow** tab of the issue.




The workflow sends a notification to the Issue Approver to review and approve whether the Issue Owner must derive a Problem Solving process from the issue to resolve the issue.

c. As an Issue Approver, open the task and review the issue before approving or rejecting it.

   Click **Approve** to approve the issue in the **INBOX** tile or in the **Workflow** tab of the issue.




The workflow sends a notification to the Issue Owner to select how to derive a Problem Solving process from the issue.

d. As an Issue Owner, open the task and select the type of derivation to be performed on the issue as follows:

   A. In the **INBOX** tile, select the task for the required issue.

   B. On the **Overview** tab, under **Targets**, view the issue for review.

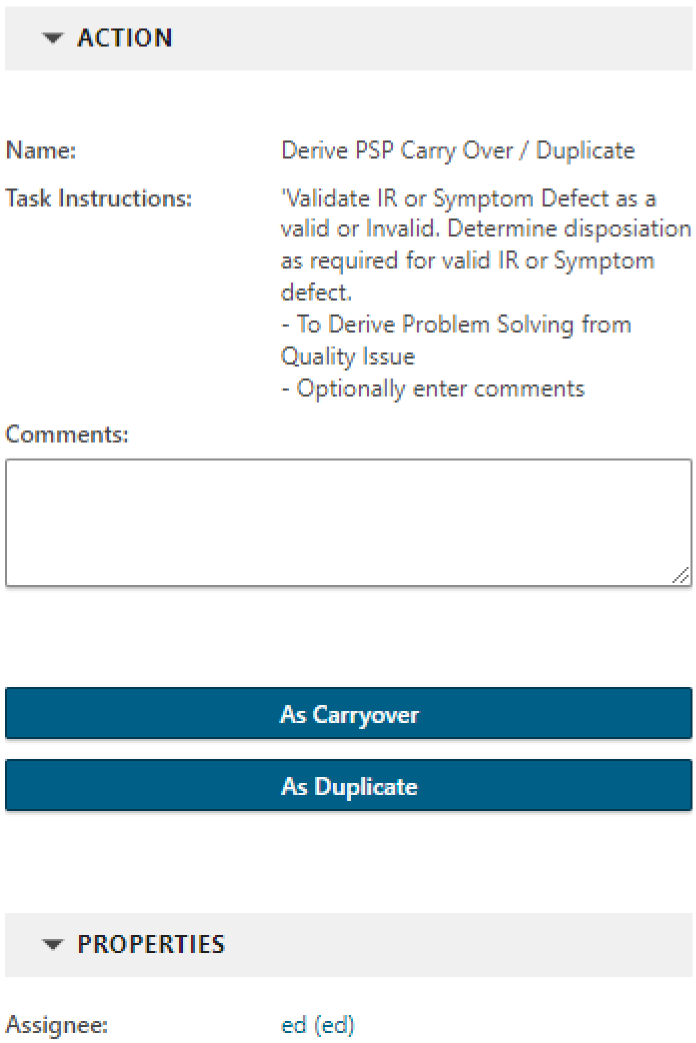
   C. Under **Action**, provide your **Comments** related to the review task.

D. Click one of the following to derive a Problem Solving process from the issue:

- Click **As Carryover** to link and use the issue's symptom defect as the problem description defect in the Problem Solving process. If you edit the defect in the Problem Solving process, the updates are reflected in the issue's symptom defect as well.

- Click **As Duplicate** to create a copy of the issue's symptom defect as the problem description defect in the Problem Solving process. If you edit the defect in the Problem Solving process, the updates are not reflected in the issue's symptom defect.

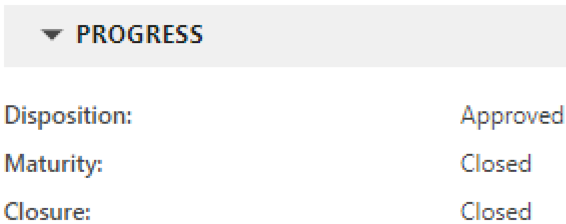
> Example:
>
> The Issue Owner, **ed**, specifies the type of derivation to be performed on the issue.




The workflow derives a Problem Solving process from the issue. It also closes the issue.

You cannot add, edit, or delete any objects in the issue. You can generate a report of the issue or reopen it by submitting it to the **Quality Issue Reopen Request** workflow. You can also create a new issue from the closed issue by choosing **More Commands** > **New** > **Save As**.

The workflow also updates the **Disposition** as **Approved**, **Maturity** as **Closed**, and **Closure** as **Closed** in the issue.



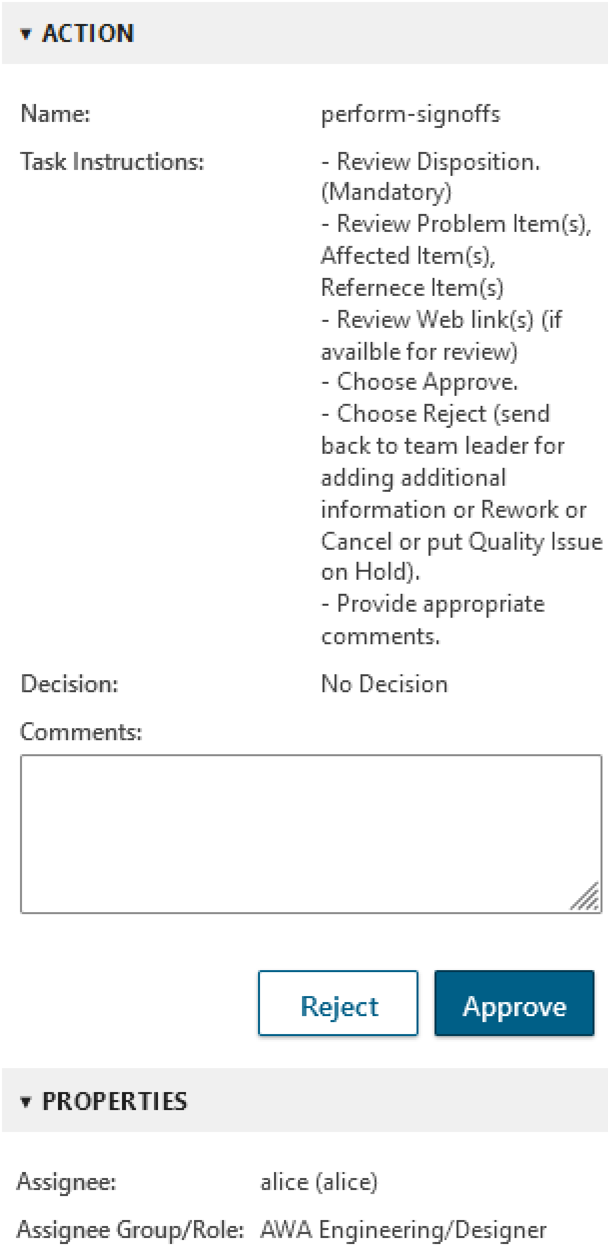

9. As an Issue Owner, to close the issue by either canceling, reworking, or putting the issue on hold, do the following:

   a. Click **Invalid** to either cancel, rework, or put the issue on hold.

      The workflow sends a notification to the Issue Approver to review and reject the issue.

   b. As an Issue Approver, open the task and reject the issue to allow the Issue Owner to either cancel, rework, or put the issue on hold.

      Click **Reject** to reject the issue in the **INBOX** tile or in the **Workflow** tab of the issue.




The workflow sends a notification to the Issue Owner to either cancel, rework, or put the issue on hold.

c. As an Issue Owner, you can choose to either cancel, rework, or put the issue on hold. Do one of the following:

- Click **Cancel** to pause work on the issue.

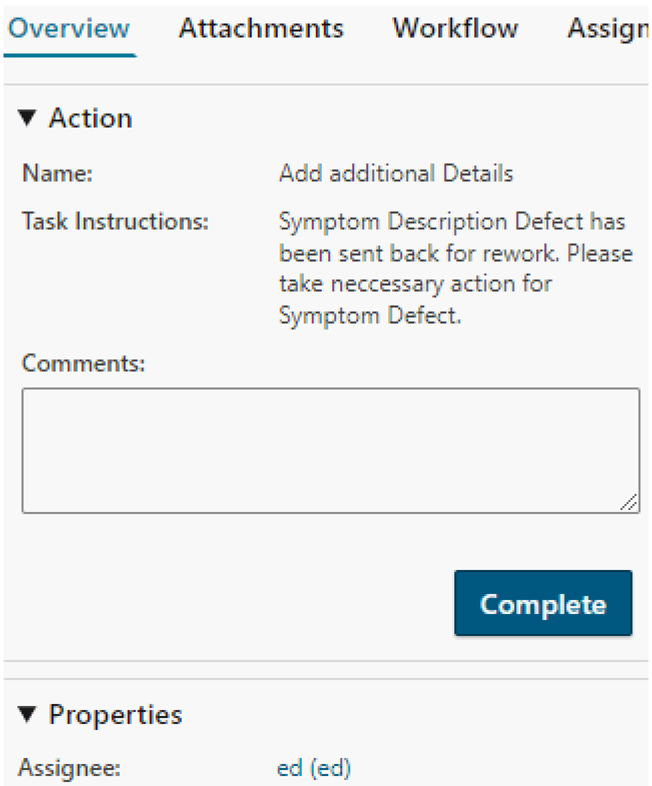
  The workflow also updates the **Disposition** as **Disapproved** and **Closure** as **Canceled** in the issue.

- Click **On Hold** to pause work on the issue.

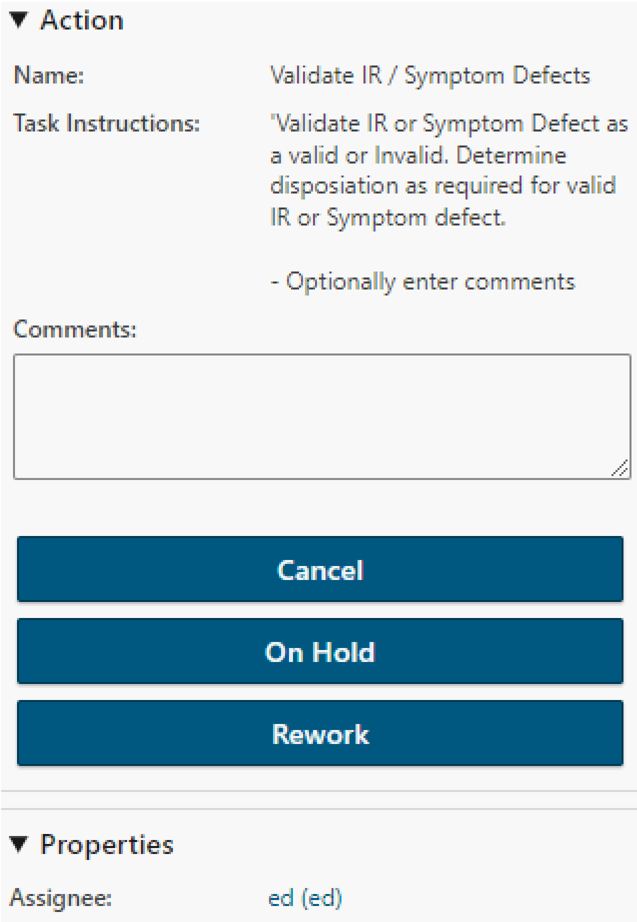
  The workflow also updates the **Disposition** as **Deferred** and **Closure** as **On Hold** in the issue.

- Click **Rework** to ask the Issue Owner to provide additional details and perform the required rework on the issue.

  The workflow sends a notification to the Issue Owner to rework the issue. After the Issue Owner completes the required rework on the issue, the Issue Owner marks the task as **Complete**.




After the Issue Owner marks the task as **Complete**, the workflow sends a notification to the Issue Owner to review the issue and symptom defects, and verify the validity of the issue.


Action
Name:
Validate IR / Symptom Defects
Task Instructions:
'Validate IR or Symptom Defect as a valid or Invalid. Determine disposiation as required for valid IR or Symptom defect.
- Optionally enter comments
Comments:
Cancel
On Hold
Rework
Properties
Assignee:
ed (ed)

# 15. Derive a change from an issue

In addition to deriving a Problem Solving process from an issue, you can also derive the following types of changes:

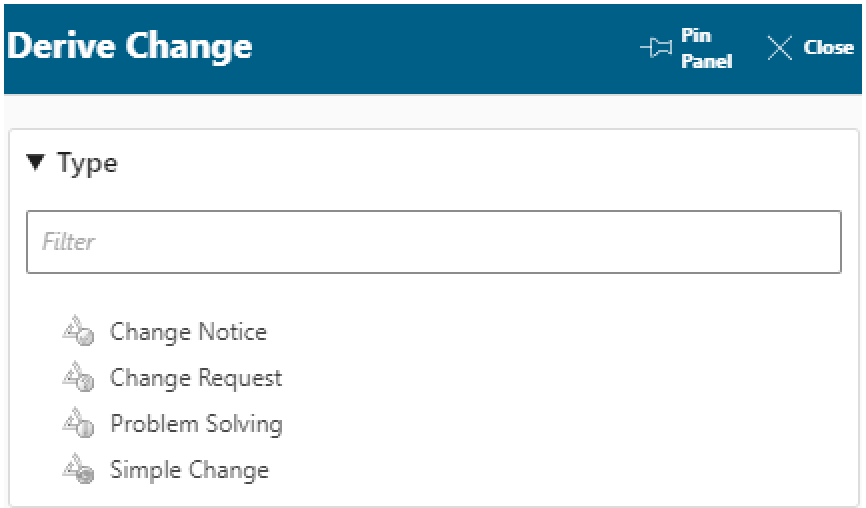
- Change Notice
- Change Request
- Simple Change

For more information about changes, see *Change Management on Active Workspace —Usage* in the Teamcenter documentation.

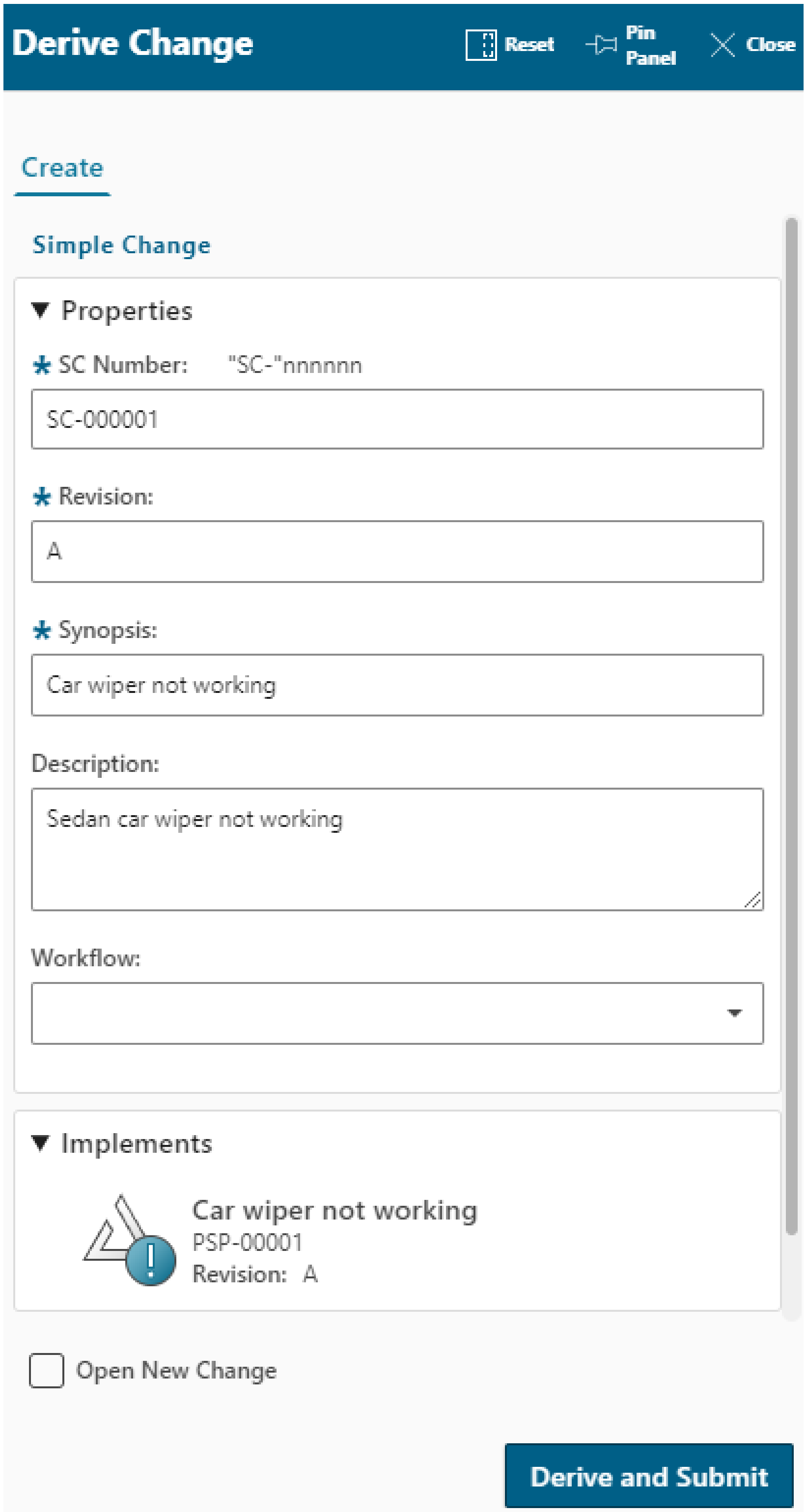
1. From the **CHANGES** folder, select and open the issue that you want to use as the source of the change.

2. Choose **More Commands** ••• > **New** > **Derive Change**.

3. In the **Derive Change** panel, select the type of change.

4. By default, the **Synopsis** and **Description** fields are populated with the **Synopsis** and **Description** of the source issue. You can update these fields as per your requirements.




5. In the **Copy Options** section, select the objects to be copied to the derived change.

6. Click **Derive and Submit**.

The derived change is created and displayed in edit mode.

The details of the derived change are listed in the **Implemented By** section of the issue.

# 16. Working with Quality Issue reports

## Generate an issue report

When you generate a report for an issue, you can view detailed information about the issue.

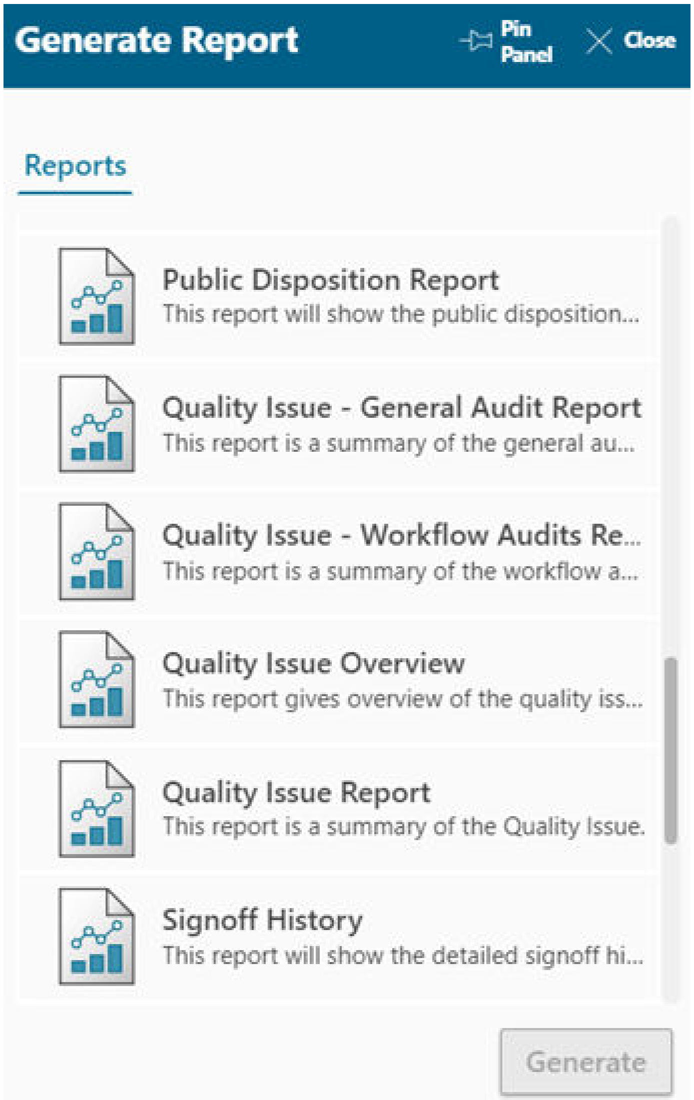
1. From the **CHANGES** folder, select and open the required issue

   If you are working in the **Quality Management** workspace, click the **QUALITY ISSUE MANAGEMENT** tile, and select and open the required issue.

2. You can generate a report by using any one of the following options:

   - Choose **More Commands** ••• > **New** > **Generate Report**.
   - In the **Reports** tab, click **Add** to view and select a list of Report Definitions to generate.

3. In the **Generate Report** panel, select **Quality Issue Report**.



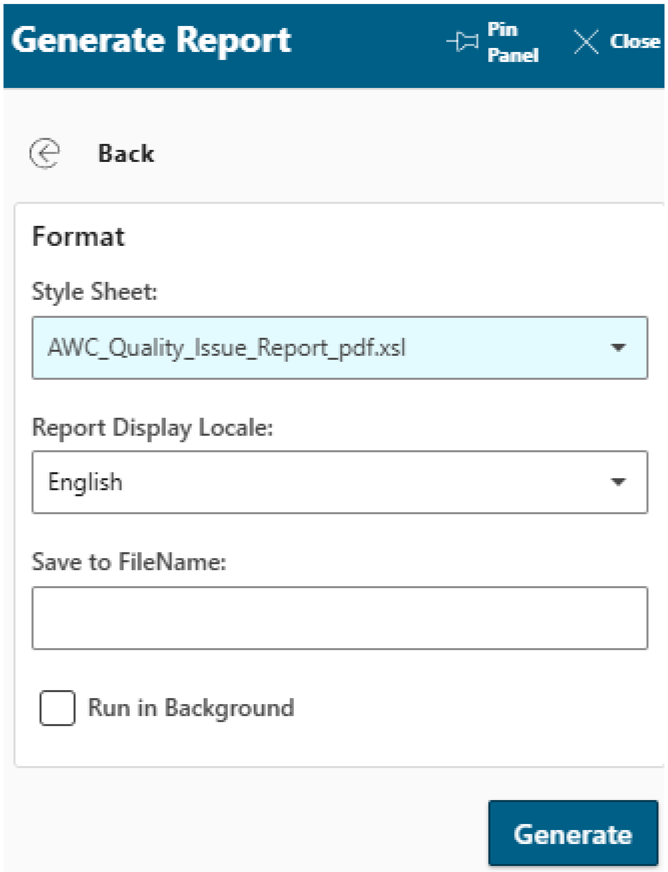

4. In the **Format** section, do the following:

   a. From the **Style Sheet** list, select from the following style sheets of the associated report:

| Type of report | Associated style sheets |
|---|---|
| **Customer Complaint Issue Report** | • **AWC_Customer_Complaint_Report_excel_OOXML.xsl**: Select this style sheet to generate the report as a Microsoft Excel file.<br><br>• **AWC_Customer_Complaint_Report_html.xsl**: Select this style sheet to generate the report as an HTML file. |

| Type of report | Associated style sheets |
|---|---|
| | • **AWC_Customer_Complaint_Report_pdf.xsl**: Select this style sheet to generate the report as a PDF file. |
| **Non-Conformance Issue Report** | • **AWC_Non_Conformance_Report_excel_OOXML.xsl**: Select this style sheet to generate the report as a Microsoft Excel file.<br>• **AWC_Non_Conformance_Report_html.xsl**: Select this style sheet to generate the report as an HTML file.<br>• **AWC_Non_Conformance_Report_pdf.xsl**: Select this style sheet to generate the report as a PDF file. |
| **Quality Issue Report** | • **AWC_Quality_Issue_Report_excel_OOXML.xsl**: Select this style sheet to generate the report as a Microsoft Excel file.<br>• **AWC_Quality_Issue_Report_html.xsl**: Select this style sheet to generate the report as an HTML file.<br>• **AWC_Quality_Issue_Report_pdf.xsl**: Select this style sheet to generate the report as a PDF file. |

b. From the **Report Display Locale** list, select the required locale.




c. (Optional) In the **Save to FileName** box, type the file name of the report.

d. Click **Generate**.

The generated report is attached to the **Files** section of the **Attachments** tab. The HTML report is generated and is displayed in the **Reports** tab. It is available in the **Reports** tab for the current session only.

> Note:
>
> You can view the images of symptom defects in the HTML report.

5. If you select the HTML style sheet, an HTML report is generated and is displayed in the **Reports** tab.

   The HTML report is available in the **Reports** tab for the current session only. This report contains detailed information about the issue. Some examples of the details include:

   - Images that are attached to the issue.

     You can preview each image and use the **Zoom In** or **Zoom Out** buttons to increase or decrease the image magnification.

- Details of the derived Problem Solving processes.
- Symptom defects of the issue
- Containment actions of the issue

6. If you select the Excel style sheet, browse to the **Downloads** folder of your browser, and open the Microsoft Excel version of the report.

   This report contains the same detailed information as in the HTML report, except for the images that are attached to the issue.

   > Note:
   >
   > To view the contents of a Microsoft Excel report, your administrator must set the **Crf_Report_Excel_Use_OOXML** preference to **True**.

7. If you select the **AWC_Quality_Issue_Report_pdf.xsl** style sheet, browse to the **Downloads** folder of your browser, and open the PDF version of the report.

   This report contains the same detailed information as in the HTML report, including the images that are attached to the issue.

## Generate an Audit Trail report for an issue

Generate a **Quality Issue Audit Trail** report to obtain a comprehensive, chronological record of all issue activities, decisions, and actions taken to address issues within a project or process. This report includes detailed events such as attach, detach, modify, and save as a copy.

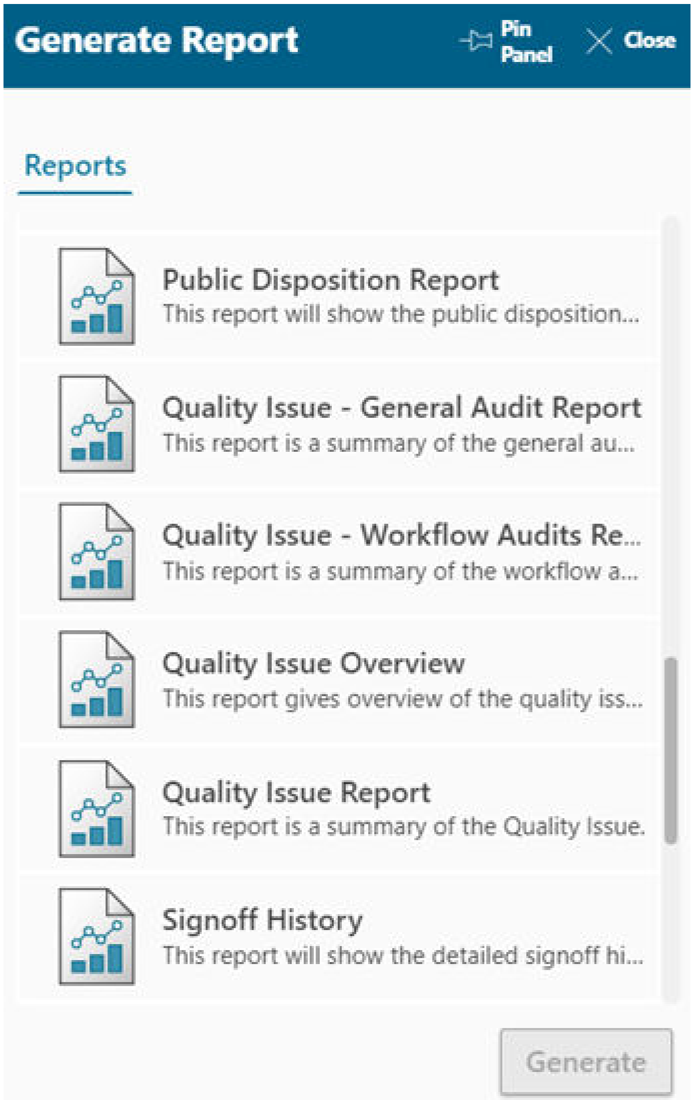
### Procedure

1. From the **CHANGES** folder, select and open the required issue.

   If you are working in the **Quality Management** workspace, click the **QUALITY ISSUE MANAGEMENT** tile, and select and open the required issue.

2. To generate a report, choose **More Commands** ••• > **New** > **Generate Report**.

3. In the **Generate Report** panel, select **Quality Issue - General Audits Report**.




4. In the **Format** section, do the following:

   a. From the **Style Sheet** list, select from the **AWC_QIM_AUD_RPT.xsl** style sheet.

   b. From the **Report Display Locale** list, select the required locale.

   c. (Optional) In the **Save to FileName** box, type the file name of the report.

   d. Click **Generate**.

      An HTML report is generated and is displayed in the **Reports** tab. The generated HTML report is also attached to the **Files** section of the **Attachments** tab.

# Generate a Workflow Audit report for an issue

Generate a **Workflow Audit** report to view the workflow steps performed on an issue and the events and remarks captured in the workflow steps.

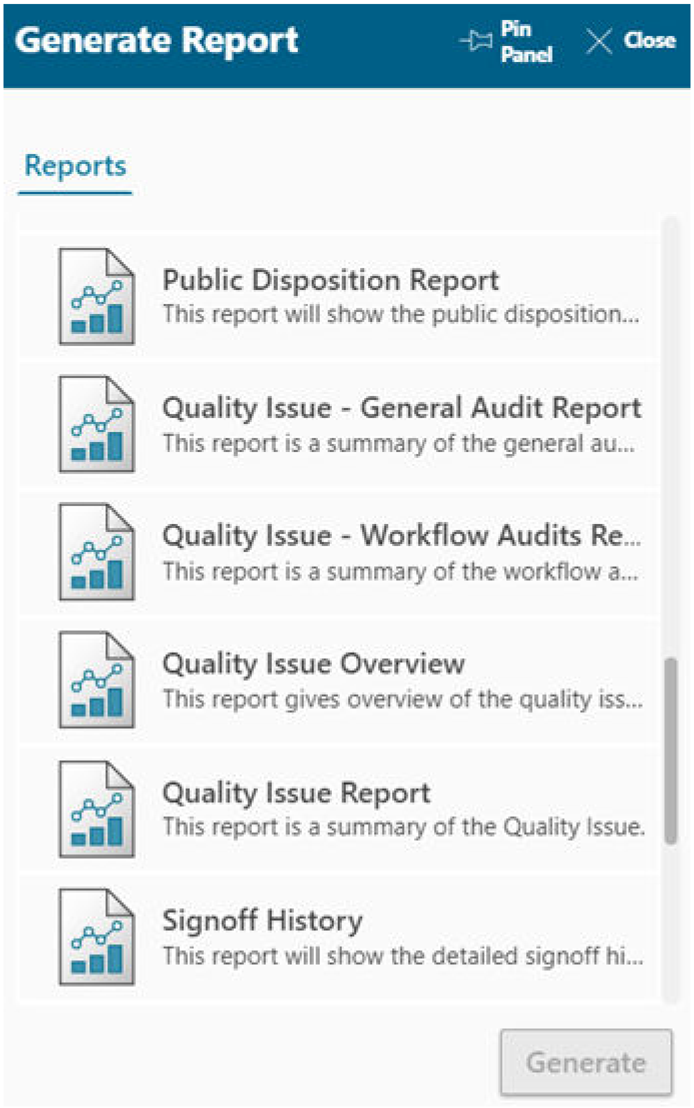
## Procedure

1. From the **CHANGES** folder, select and open the required issue.

   If you are working in the **Quality Management** workspace, click the **QUALITY ISSUE MANAGEMENT** tile, and select and open the required issue.

2. To generate a report, choose **More Commands** ••• > **New** > **Generate Report**.

3. In the **Generate Report** panel, select **Quality Issue - Workflow Audits Report**.



4. In the **Format** section, do the following:

   a. From the **Style Sheet** list, select from the **AWC_QIM_WF_AUD_RPT.xsl** style sheet.

   b. From the **Report Display Locale** list, select the required locale.

   c. (Optional) In the **Save to FileName** box, type the file name of the report.

   d. Click **Generate**.

      An HTML report is generated and is displayed in the **Reports** tab. The generated HTML report is also attached to the **Files** section of the **Attachments** tab.

## Analyze the performance of Customer Complaint Issues, Non-Conformance Issues, and Quality Issues

You can analyze the performance by using the default Customer Complaint Issues, Non-Conformance Issues, and Quality Issues active summary reports. These reports collate and summarize similar information, for example, information about the open and closed issue, and which issues were closed after the due date and which ones were closed on time.

You can add the default Customer Complaint Issues, Non-Conformance Issues, and Quality Issues active summary reports to **My Dashboard**.

### Procedure

1. On the **Home** page, click the **Reports** tile.

   By default, the available reports are displayed as thumbnails in **My Dashboard**.

2. To add a report from **Templates**, click **Add** ⊕ on the top left side above the report tiles.

3. Search for the default Customer Complaint Issues, Non-Conformance Issues, and Quality Issues reports in the **Add Report** panel by specifying **Quality Issues** as the search criteria.

4. Select the required report, and click **Add**.

5. (Optional) Open the report and if the report contains data in a tabular format at the bottom, click the table header of the column you want to sort and choose the appropriate option. You can also select an operator for further filtering. The valid operators are **Contains**, **Does not contain**, **Begins with**, **Ends with**, **Equals**, and **Does not equal**. For example, for an open Quality Issues report, you can select **Type** and type **Non-Conformance Issue** to find the open Non-Conformance Issues.

6. To export the report as a Microsoft Excel file, click **Export to Excel**.

The **Export To Excel** panel is displayed with a list of properties available for export.

7. To change the order of the properties, select a property, and in the **Selected Properties** section, click **Move Up** or **Move Down**.

8. To add more or remove properties to be exported, do the following:

   a. In the **Selected Properties** section, click **Add Properties**.

   b. Select the check boxes for the properties that you want to export.

   c. In the **Add Properties** pane, clear the check boxes for the properties that you do not want to export.

   d. Click **Add**.

9. Click **Export**.

   A dialog box is displayed to download the Excel file to your computer.

# 17. Sharing and reusing issues

## Share an issue with other sites in a Multi-Site Collaboration network

When addressing an issue in a Multi-Site Collaboration network, you may identify valuable lessons learned that must be shared with other sites. In such cases, you can share this information with the relevant sites for them to implement the same, and avoid similar issues in their site. Additionally, if you determine that a reported issue impacts or is owned by another site (for example, when the same product or part is manufactured at multiple locations), you can transfer the issue to the appropriate site for them to perform the necessary actions.

To share an issue with other sites, you must first publish it to the required sites. Then, specify additional sharing details, such as the destination sites and several transfer options, and share the issue.

### Prerequisites

The administrator has installed and configured Multi-Site Collaboration for all sites in your network.

### Procedure

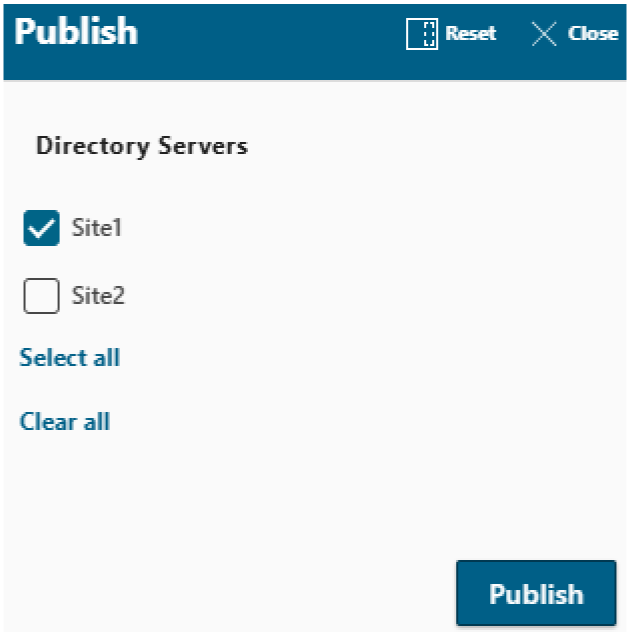
1. From the **CHANGES** folder, select and open the required issue.

   If you are working in the **Quality Management** workspace, click the **QUALITY ISSUE MANAGEMENT** tile, and select and open the required issue.

2. To publish the issue, do the following:

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

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




When you publish an issue, the symbol appears next to the name of the issue.

3. To cancel publishing an issue, 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 an issue, the symbol is removed from the name of the issue.

4. To share the issue, 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 target destinations.

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

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

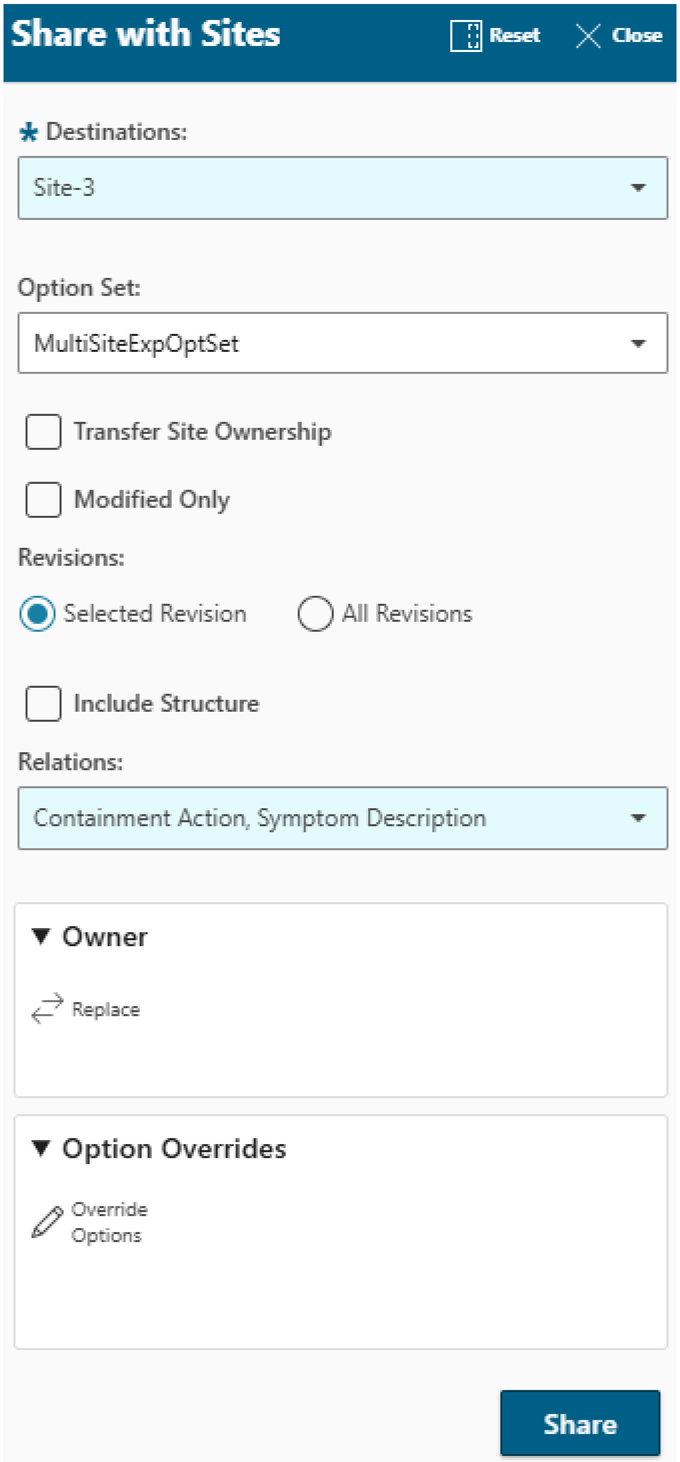
    The transfer option set defines the configuration rules when transferring data between sites. The available option sets vary depending on your site's configuration.

    d. To transfer site ownership of the issue to the destination site, select **Transfer Site Ownership**.

When you transfer site ownership, all revisions of the issue will be shared.

e. To share an issue only when it has been modified since the last time it was exported to the destination site, select **Modified Only**.

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




Example:

You can share the containment actions and symptom defect used to create the issue.

g. (Optional) Change the owner of the transferred issue 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 issue at a time. The site with ownership can modify the issue. The other sites contain a replica of the issue.

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 issue with the destination sites.

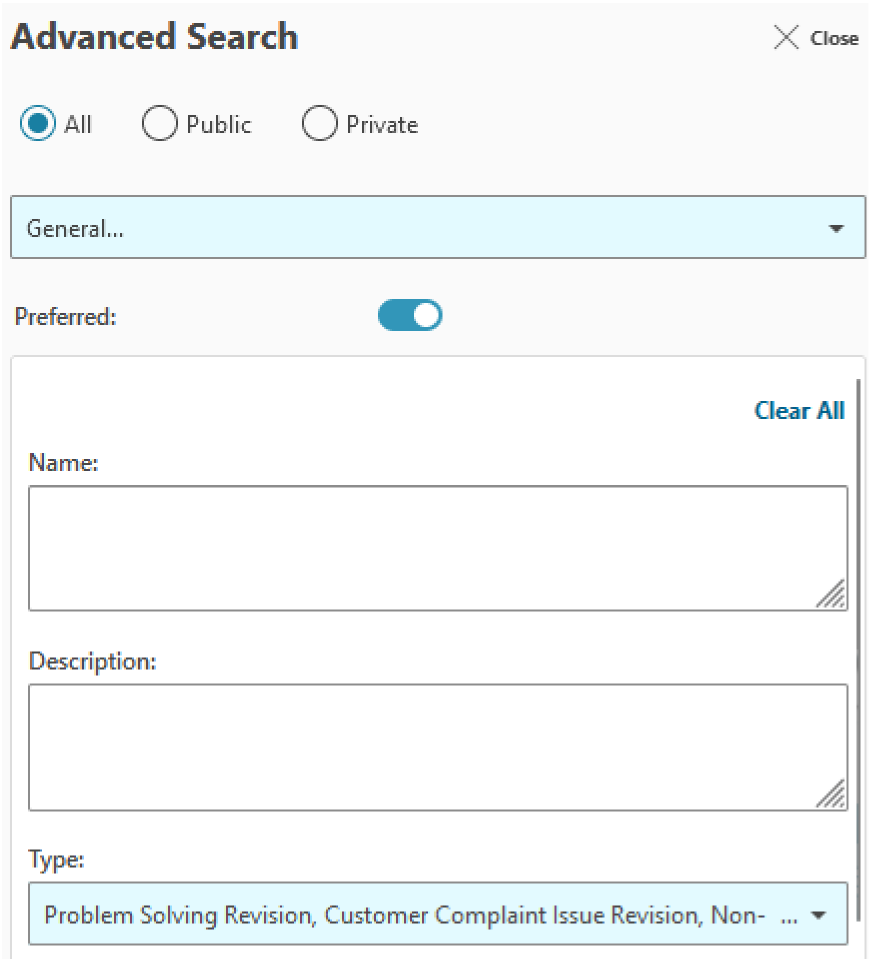
   You receive a notification when the transfer completes. Send an email or notification message to the team members of the destination sites so that they can search for it and begin working on it in their site.

j. If you make updates to the issue, 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 issue, in the destination site, to access the issue, do the following:

   a. In **Advanced Search**, select **General**, select **Customer Complaint Issue Revision**, **Non-Conformance Issue Revision**, or **Quality Issue Revision** as the type of search, and click **Search**.




b. In the search results, select the shared issue, and open it to work on it.

## Export an issue for review or sharing

You can export an issue externally for review or sharing purposes through a ZIP file.

1. Select the issue to be exported, and choose **More Commands** ••• > **Import/Export** > **Export PLM XML** to display the **Export PLM XML** panel.

2. Accept the default file name or update it as necessary.

3. From the **Transfer Mode** list, depending on the type of issue, select the relevant transfer mode to determine what issue data is exported:

   - **AWCCustomerComplaintIssueRevisionTM**

   - **AWCNonConformanceIssueRevisionTM**

- **AWCQualityIssueRevisionTM**

> Note:
>
> If you are using a custom object for Quality Issues, you must update the existing transfer mode to use the custom object. Contact your system administrator to perform this update.

4. (Optional) Specify export languages to export as appropriate.

5. Click **Export** to create the exported PLM XML file. The export begins and you receive an alert when the export is complete.

### Review the export report

You receive a report alert when your export completes. Click the alert to view the export report. Access all recent alerts from the **Subscription** tile.

The **Properties** section of the report includes details about the export such as the type of export, export completion status, and transfer mode used. Under **Related Objects**, click on the export log entry to view a detailed list of actions and results from the export.

## Create an issue by importing an existing issue

You can create an issue from an existing one by importing the issue.

1. In the **Quality Management** workspace, click the **QUALITY ISSUE MANAGEMENT** tile.

2. Choose **More Commands** ••• > **Import/Export** **Import PLM XML** to display the **Import PLM XML** panel.

3. Use **Choose File** to locate the *.zip* issue file on your local system.

4. From the **Transfer Mode** list, select the **incremental import** transfer mode to determine what issue data is imported.

5. Click **Import** to import the objects in the *.zip* file. The import begins and you receive an alert when the import is complete.

### Review the import report and objects

You receive a report alert when your import is complete. Click on the alert to view the report. (Access all recent alerts from the **Subscription** tile.)

**Related Objects** shows the folder in which the objects were imported, In **Target Object**, view a detailed list of actions and results during the import.

Open the folder in which the objects were imported and review the imported structure.