



TEAMCENTER

Quality Project Management

Teamcenter 2412

Unpublished work. © 2025 Siemens

This Documentation contains trade secrets or otherwise confidential information owned by Siemens Industry Software Inc. or its affiliates (collectively, "Siemens"), or its licensors. Access to and use of this Documentation is strictly limited as set forth in Customer's applicable agreement(s) with Siemens. This Documentation may not be copied, distributed, or otherwise disclosed by Customer without the express written permission of Siemens, and may not be used in any way not expressly authorized by Siemens.

This Documentation is for information and instruction purposes. Siemens reserves the right to make changes in specifications and other information contained in this Documentation without prior notice, and the reader should, in all cases, consult Siemens to determine whether any changes have been made.

No representation or other affirmation of fact contained in this Documentation shall be deemed to be a warranty or give rise to any liability of Siemens whatsoever.

If you have a signed license agreement with Siemens for the product with which this Documentation will be used, your use of this Documentation is subject to the scope of license and the software protection and security provisions of that agreement. If you do not have such a signed license agreement, your use is subject to the Siemens Universal Customer Agreement, which may be viewed at <https://www.sw.siemens.com/en-US/sw-terms/base/uca/>, as supplemented by the product specific terms which may be viewed at <https://www.sw.siemens.com/en-US/sw-terms/supplements/>.

SIEMENS MAKES NO WARRANTY OF ANY KIND WITH REGARD TO THIS DOCUMENTATION INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT OF INTELLECTUAL PROPERTY. SIEMENS SHALL NOT BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, CONSEQUENTIAL OR PUNITIVE DAMAGES, LOST DATA OR PROFITS, EVEN IF SUCH DAMAGES WERE FORESEEABLE, ARISING OUT OF OR RELATED TO THIS DOCUMENTATION OR THE INFORMATION CONTAINED IN IT, EVEN IF SIEMENS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

TRADEMARKS: The trademarks, logos, and service marks (collectively, "Marks") used herein are the property of Siemens or other parties. No one is permitted to use these Marks without the prior written consent of Siemens or the owner of the Marks, as applicable. The use herein of third party Marks is not an attempt to indicate Siemens as a source of a product, but is intended to indicate a product from, or associated with, a particular third party. A list of Siemens' Marks may be viewed at: www.plm.automation.siemens.com/global/en/legal/trademarks.html. The registered trademark Linux® is used pursuant to a sublicense from LMI, the exclusive licensee of Linus Torvalds, owner of the mark on a world-wide basis.

About Siemens Digital Industries Software

Siemens Digital Industries Software is a global leader in the growing field of product lifecycle management (PLM), manufacturing operations management (MOM), and electronic design automation (EDA) software, hardware, and services. Siemens works with more than 100,000 customers, leading the digitalization of their planning and manufacturing processes. At Siemens Digital Industries Software, we blur the boundaries between industry domains by integrating the virtual and physical, hardware and software, design and manufacturing worlds. With the rapid pace of innovation, digitalization is no longer tomorrow's idea. We take what the future promises tomorrow and make it real for our customers today. Where today meets tomorrow. Our culture encourages creativity, welcomes fresh thinking and focuses on growth, so our people, our business, and our customers can achieve their full potential.

Support Center: support.sw.siemens.com

Send Feedback on Documentation: support.sw.siemens.com/doc_feedback_form

Contents

About Quality Project Management in Teamcenter 1-1

Access the tile for your Quality application in the Quality Management workspace 2-1

What are checklists? 3-1

Manage a quality checklist template

Task flow to manage a quality checklist 4-1

Create a quality checklist 4-2

Add questions to the quality checklist 4-3

Add a process for a quality checklist 4-4

Manage RYG ratings in a Checklist 4-5

 Understanding RYG rating in program checklist 4-5

 Add RYG rating rule to a quality checklist 4-5

 Define a rule to rollup the RYG rating of a quality checklist 4-6

 Set answer possibilities and evaluation rules 4-7

 Edit a RYG rating 4-8

 Subscribe to RYG rating objects 4-9

Release a quality checklist using a workflow 4-10

Assign a due date to checklist objects 4-11

Add attachments to the checklist 4-12

Specify the sequence of the quality checklists 4-12

Exclude checklist questions from RYG rating evaluation 4-13

Create a new version of a released quality checklist 4-13

Generate quality checklist reports 4-14

 Generate a PPA cover sheet report 4-14

 Generate a PPA evaluation report 4-19

Manage a checklist

Task flow to manage a checklist 5-1

Create a checklist in an event 5-2

Add a quality checklist to an event 5-2

Add a quality checklist to a project or program 5-3

Add a question to the checklist 5-4

Assign a due date to the checklist 5-4

Assign the checklist to the user 5-5

Answer the questions in a checklist 5-5

Viewing status of a checklist 5-6

Override the RYG rating for a checklist 5-7

Add issues to the checklist	5-8
Add Problem Solving processes to the checklist	5-9
Add quality actions to the checklist	5-10
Assign the questions to the responsible user	5-11
Delete a checklist	5-11

Edit the properties of a checklist 6-1

View and track your programs in the calendar 7-1

Manage your activity list 8-1

**Share the checklists and checklist questions with other sites in a
Multi-Site Collaboration network** 9-1

1. About Quality Project Management in Teamcenter



Quality Project Management is a structured approach to collect information about quality issues from existing products and manufacturing processes to develop counter measures, that is, to avoid similar problems with future products. This information helps you create quality plans at the initial stage in each phase of the product development lifecycle.

Teamcenter's Quality Project Management solution can be used to:

- Reduce risks associated with the launch of a new product by ensuring that there are few or no quality problems.
- Take early corrective action by gathering feedback from previous projects.
- Improve quality planning procedures and communication among all stakeholders, including suppliers.
- Help suppliers develop appropriate prevention and detection measures for new products while supporting the corporate quality effort.



Where do I go from here?

 Administrator	<p>To know which features are required to install Quality Project Management, see Install Quality Project Management.</p> <p>Administrators can customize RYG rating behavior, view audit logs for RYG ratings, and set preferences to display the context of the quality actions in Quality Project Management.</p>
 Business User	
How do I work with programs?	To know how you can work with programs, refer to the section on programs that includes information on creating a program, and modifying programs.
How do I work with projects?	To know how you can work with projects, refer to the section on projects that includes information on adding a project, adding a subproject, and modifying projects and subprojects.
How do I work with events?	To know how you can work with events, refer to the section on events that includes information on adding an event and modifying the event.
How do I perform Quality Project Management in Teamcenter?	The Quality Project Management process in Teamcenter is largely based on the Quality Project Management framework followed by the industry. See the Quality Project Management checklist process workflow for the sequence of tasks performed by different users of Quality Project Management using Teamcenter.
How do I work with checklists in Teamcenter?	To know how you can work with checklists in Teamcenter, refer to the section on checklists that includes information on creating checklists , modifying them, modifying their properties, and adding questions to them (among other tasks).
What are RYG ratings?	RYG ratings are used at the program, project, subproject, event, checklist, and question levels to indicate the status of the various criteria. For more information, see how RYG ratings in events and RYG ratings in checklists are used for indicating the status .

<p>How do I associate RYG ratings to checklists and questions?</p>	<p>To associate an RYG rating a checklist object, see the steps on how to associate an RYG rating to a checklist object.</p>
<p>After Quality Project Management, how can I track other quality-related tasks and the identified issues?</p>	<p>To know more about how to create, execute, and track the recommended prevention or detection actions, and other quality-related tasks, see the information in Quality Actions.</p> <p>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.</p>

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.

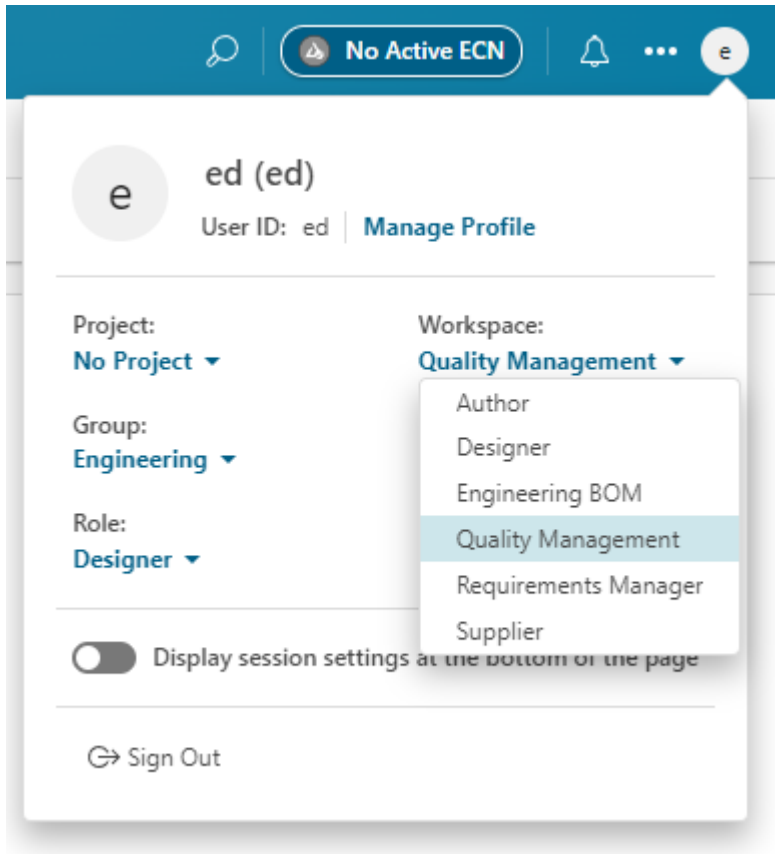
Your administrator must make the **Quality Management** workspace available for your organization's groups and roles.

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

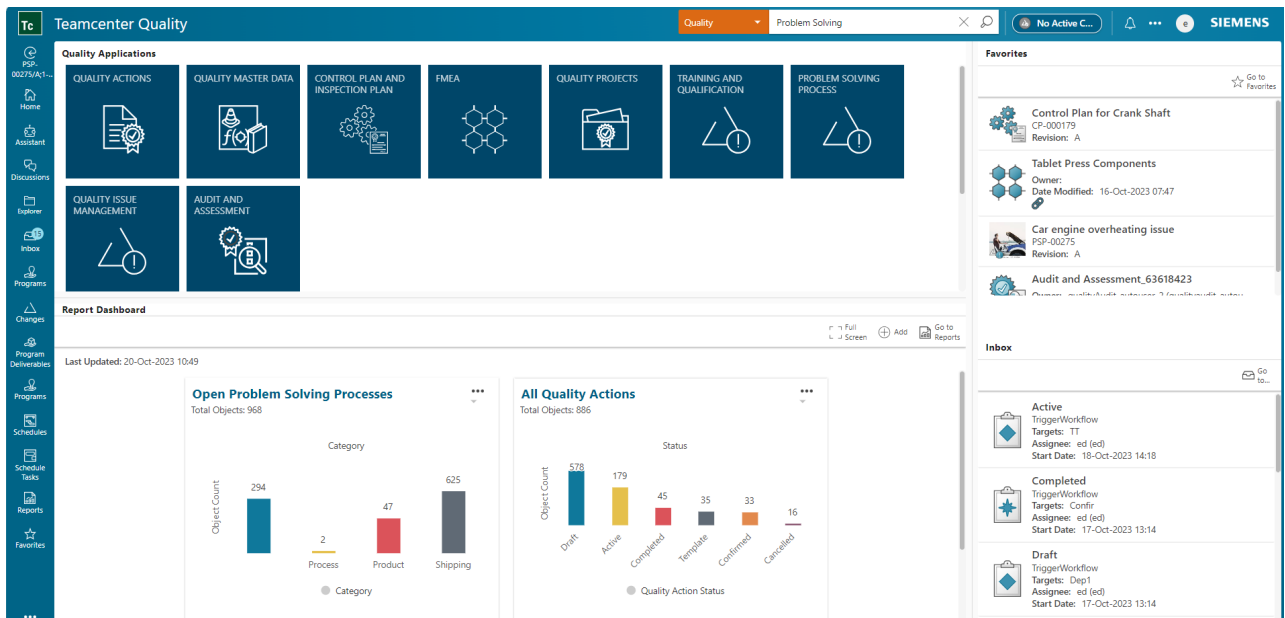
To access the tile for your Quality application in the **Quality Management** workspace:

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. What are checklists?

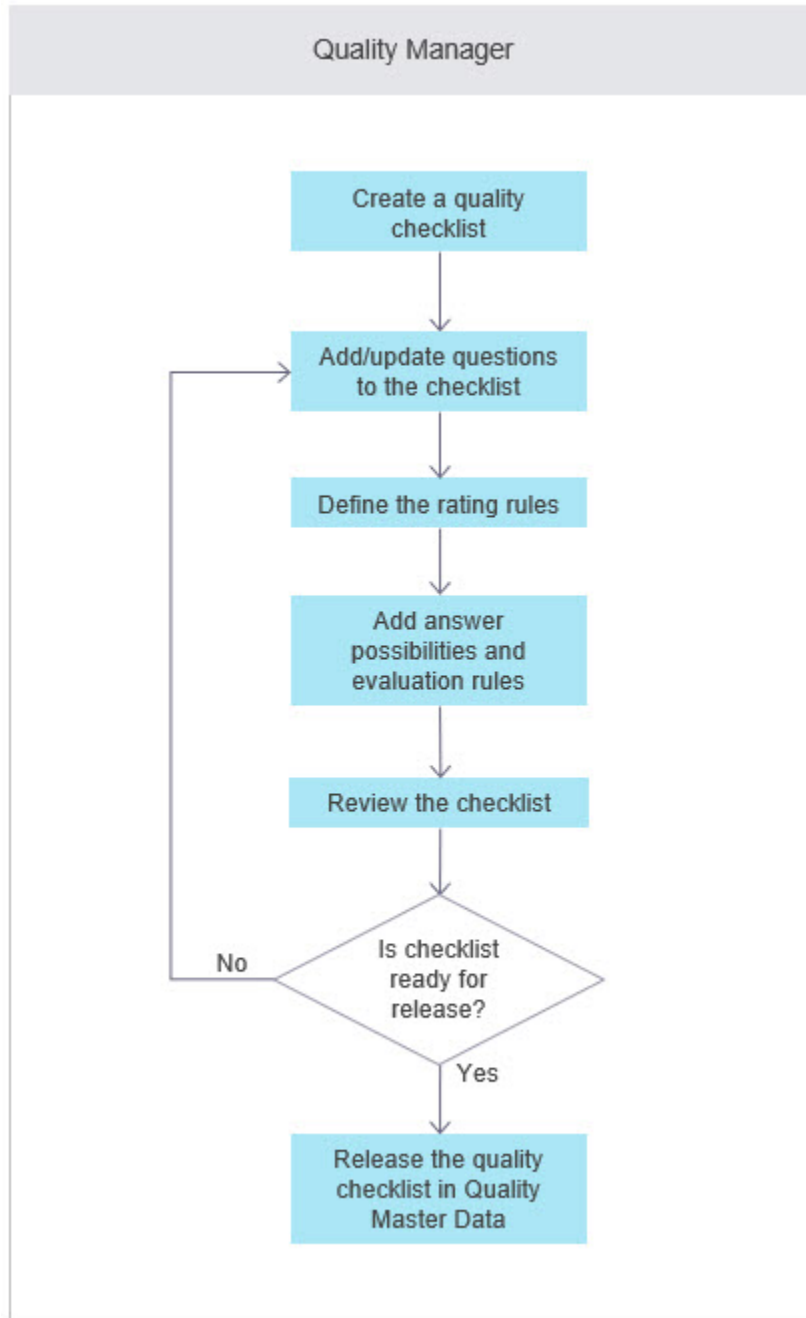
A checklist is a structured list of questions and criteria used to follow processes in a systematic manner.

There are two types of checklists: **Quality Checklist** and **Checklist (program checklist)**.

Quality checklists are the questionnaire templates created by the quality manager that can be used in various fields. Checklists are the list of questions specifically created for a program deliverable that needs to be completed for an event.

4. Manage a quality checklist template

Task flow to manage a quality checklist



Consider a scenario where an automotive company needs to ensure the quality of brake pads in a car before they are shipped to customers. The quality manager, creates a checklist *Brake Pad Quality Assurance* in the Quality Master Data. The quality manager adds specific questions related to the brake pads, some of these are as follows:

1. Are the brake pads free from visible defects?
2. Is the thickness of brake pad between 8 mm to 12 mm?
3. Did the brake pad's friction performance test pass or fail?

The quality manager then adds the rating rule and possible answers for the questions in the checklist, such as yes, no, true, false, and not applicable. The quality manager also adds the evaluation rules based on RYG (red, yellow, green) ratings. For example, red for any no, false, or fail answers, yellow for any not applicable answers, and green for all yes, true, or pass answers.

The quality manager then reviews, approves, and releases the checklist, making it available for use in various Teamcenter solutions such as Program Planning, Vendor Management, Training and Qualification. For example, during Vendor Management, the checklist is used to evaluate the quality of brake pads supplied by different vendors. In Training and Qualification, the checklist helps ensure that employees are trained to identify and address quality issues related to brake pads.

Create a quality checklist

A checklist template (Quality Checklist) in Quality Master Data is a structured list of questions and criteria used to follow processes in a systematic manner.

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab.
3. Choose **More Commands** **...** > **New** **✱** > **Add** **⊕**.
4. In the **Add** panel, specify a value for the **Checklist ID** and enter a **Name** for the checklist.
5. From the **Checklist Type** menu, select **Checklist**.
6. From the **Checklist Area** menu, select the type of area for which you want to create the checklist.

You can select **Free Checklist** if you want to create a checklist that is not bound to any specific industry standards.

7. From the **Industry Standard** menu, specify the industry standard as required.

You cannot specify an industry standard for free checklists.

Note:

You can **generate quality checklist reports** only if you have selected the **Checklist Area** as **APQP** and **Industry Standard** as any PPAP standard from the list.

8. In the **SETTINGS** section, select the **Assessment Required** and **Mandatory** check boxes if required.

If the **Assessment Required** check box is selected, the RYG rating of an object is automatically rolled up.

If the **Mandatory** check box is selected, the questions become mandatory for evaluation based on RYG ratings.

9. Click **Add**.

The quality checklist is created. Now you can add checklists, chapters, questions, or sub-questions to the checklist template.

Add questions to the quality checklist

You can add multiple questions or sub-questions to a checklist template, for the detailed and structured procedures.

To add a question to the checklist template:

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab and select the checklist template in which you want to add the questions.
3. Choose **More Commands** **...** > **New** **✱** > **Add** **⊕**.
4. In the **Add** panel, specify the **Checklist ID** and **Name**.
5. From the **Checklist Type** menu, select **Question**.
6. From the **Checklist Area** menu, select the type of area for which you want to create the checklist.

You can select **Free Checklist** if you want to create a checklist that is not bound to any specific industry standards.

7. From the **Industry Standard** menu, specify the industry standard as required.

You cannot specify an industry standard for free checklists.

8. In the **SETTINGS** section, select the **Assessment Required** and **Mandatory** check boxes if required.

If the **Assessment Required** check box is selected, the RYG rating of an object is automatically rolled up.

If the **Mandatory** check box is selected, the questions become mandatory for evaluation based on RYG ratings.

- Click **Add**.

The question is added in the checklist template.

Add a process for a quality checklist

You can specify processes and subprocesses for a quality checklist to help quality engineers filter and use the relevant checklists for which they are assigned.

Example:



In a car manufacturing plant, the quality control team uses Teamcenter to manage their quality checks for three main processes: *Assembly*, *Painting*, and *Final Inspection* with subprocesses: *Door Installation*, *Primer Application*, and *Safety Feature Check*, respectively. They create a quality checklist that includes questions for all three processes. The quality engineer responsible for the *Assembly* process, filters the checklist to view only the questions relevant to the *Assembly* process.

Procedure

- On the **Home** page, click the **QUALITY MASTER DATA** tile.
- Click **Checklists**.
- Select the required checklist.

Note:

Make sure you select a checklist that is not released. If you want to specify the process and subprocess for a released checklist, you must **create a new version of the checklist**, and specify the required properties.

- Choose **More Commands** **...** > **Edit**  > **Summary** .
- In the **Checklist Configuration** section, select the required process from the **Process** list.

Note:

- If the process is not listed, you can enter the name of the required process.
- You can add one or more processes for the checklist.

- Select the required sub-process 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 subprocess name.

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

Manage RYG ratings in a Checklist

Understanding RYG rating in program checklist

The red, yellow, green (RYG) ratings are used at the checklist and question levels to indicate the status of the various criteria.

The quality manager assigns the checklists responsible users. They answer the questions by the assigned due date. As per the set **RYG rating rules and evaluation rules**, the RYG rating is automatically assigned to the questions when it is answered. For example, based on the set rules, if the question is answered with a no, the RYG automatically shows red color indicator. Further, if there is a quality action associated with it, it becomes yellow. Similarly, if the answer is a yes, it becomes green.



Each checklist can have multiple questions. 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.

Only one RYG rating can be associated to each checklist and question. The RYG rating roll up cannot happen if there are no associated RYG rating rule. After associating an RYG object, you can delete the RYG object if necessary.

Add RYG rating rule to a quality checklist

You can add a RYG rating rule to a checklist template.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab and select the checklist template in which you want to add the questions.
3. Choose **More Commands** **...** > **New**  > **Add Quality Rating Rule** .
4. In the **Add Quality Rating Rule** panel, specify the required properties.

5. Click the **Add**.

Now you can **add answer possibilities and evaluation rules** for the checklist template.

Define a rule to rollup the RYG rating of a quality checklist

You, as a quality manager, can define a RYG rating rollup rule for a quality checklist by setting the minimum threshold percentage for the rating. This allows you to determine when the rating calculation should begin in the checklist. The RYG rating is rolled up for the checklist only when the specified percentage of questions in the checklist are answered.

The rating roll-up rule is applicable for each chapter, question, or sub question of the checklist and also for any ad-hoc questions that you add to the checklist. If you do not specify a value, the default value of 0% will be used, which means the RYG rating roll up is calculated as soon as the responsible users answer the first question in the checklist.

Example:



In a brake pads inspection checklist, if the **Rating Calculation Threshold Percentage** is set to 70%, the RYG rating is calculated only when at least 70% of the questions in the checklist are answered. If there are 20 questions in the checklist, of which 10 are mandatory, then the RYG rating will be calculated only when at least 14 questions (70%) are answered.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab and select the quality checklist for which you want to define the criteria for the RYG rating roll up.
3. Click the **Rules** tab.

Note:

The **Rules** tab is available only when you **add a rating rule for the checklist**.

4. Choose **More Commands** **...** > **Edit**  > **Summary** .
5. Specify the required value in **Rating Calculation Threshold Percentage**.

Brake Pad Inspection Checklist
 Owner: ed (ed) Date Modified: 14-Oct-2024 Type: Checklist Specification

Overview **Rules** History Where Used Quality Actions References Attachments

▼ **Properties**

Rating Rule ID: Rating-000001
 Name: roll up rule
 Description:
 Owner: ed (ed)
 Creation Date: 14-Oct-2024

Rating Calculation Threshold Percentage: 50

▼ **Answer Configuration**

Select All

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

Set answer possibilities and evaluation rules

You can configure the answers options and the rating values for a checklist.

The evaluation of the rating rules depends on the **Assessment Required** property. If it is set to true, you can add rules for the child objects of the checklist, and the rating of the checklist is calculated based on the answers given to all the child objects in the checklist. If the **Assessment Required** property is set to false, the rating of the checklist is calculated based on the rating of the intermediate levels such as the checklist, chapter, or questions in the checklist.

Along with the evaluation rules, you can add other parameters to be considered while calculating the rating. To do this, you can configure the **AWC_QcORatingRuleEvaluationProperties** preference to specify the properties available in the additional parameters that can be used to set the evaluation rules to calculate the rating of the checklist.

These additional parameters work in conjunction with the **Assessment Required** property.

If the **Assessment Required** property is set to true, and you add any additional parameters, then the additional parameters are matched on that object only. But if the **Assessment Required** property is set to false, then the additional parameters are matched with the children of that object.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab and select the checklist template in which you want to add the answer possibilities and evaluation rules.
3. Click the **Rules** tab and click **Edit**.

Note:

You will see the **Rules** tab only if you have **added RYG rating rule** for the checklist template.

4. Specify the **Rating Calculation Threshold Percentage**.
5. In the **ANSWER CONFIGURATION** table, set the required **Value** for the **Answer Option**.

OR

In the **ANSWER CONFIGURATION** table, add a new **Answer Option**.

- a. Click **Add** ⊕.
- b. In the **Add** panel, select the required **Answer Option** and type the required **Value**.
- c. Click **Add**.

The new **Answer Option** is created.

6. In the **EVALUATION RULES** table, set the required **Condition**.

OR

In the **EVALUATION RULES** table, add a new **Condition**.

- a. Click **Add** ⊕.
- b. In the **Add** panel, select the required **Rating** and **Answer**.
- c. Select the **Assessment Required** and **Mandatory** check boxes, if required.
- d. Click **Add**.

The new **Condition** is created.





Edit a RYG rating

You can edit the **Properties** or **Rating Calculation Threshold Percentage** for the RYG ratings.

Note:

You can edit the RYG rating only for the checklists that are not released.

Procedure

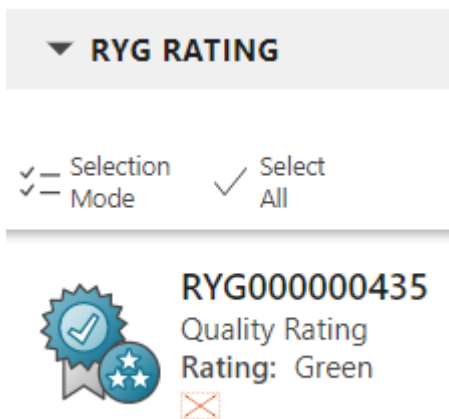
1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab and select the checklist template in which you want to add the answer possibilities and evaluation rules.
3. Click the **Rules** tab and choose **More Commands ...** > **Edit**  > **Summary** .
4. Edit the required fields.
5. Choose **More Commands ...** > **Edit**  > **Save Edits** .


Subscribe to RYG rating objects

Whenever a program planning object such as a program, an event, or a checklist is created, the system automatically creates an RYG rating object as a secondary object to the primary object, that is, the program planning object. You can subscribe to such RYG rating objects to get notified when they are modified.

1. Open a program, an event, or a checklist, click the **Quality** tab, and select the RYG rating.

The ID of the RYG rating is similar to the ID of the program planning object, for example, if the ID of the program is **PRG000000435**, then the ID of the associated RYG object is **RYG000000435**.



2. Choose **More Commands ...** > click **Share**  > **Follow**.
3. Click **OK** when the following message is displayed:

None of the configured events are applicable for the selected object.

4. Select which event type you want to follow, the frequency, and the priority. You can also add other users as followers.

- **Event Type**

Note:

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

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

- **My Events**

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

- **Name**

An editable prepopulated field is displayed when only a single object is selected for the following.

- **Frequency**

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

- **Priority**

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

- In the **FOLLOWERS** section, click **Add Follower** ⊕ to add a follower. The **USERS** section starts narrowing down the results as you type; type the first few characters of the user's name to display the user you want. Then, select the user and click **Add**.


5. Click **Follow**.

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

Release a quality checklist using a workflow

You can release a quality checklist. Once a quality checklist is released, you can **create a new version of it**.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab.
3. Select the quality checklist that you want to release.
4. Choose **More Commands** **...** > click **Manage** > **Submit to Workflow** .

In the **Submit to Workflow** panel, the default values of **Template** is **Release Checklist Specification** and for **Name** it is **Release Checklist Specification : Checklist**.

5. Specify a name for the workflow or accept the default.
6. Click **Submit**.

The workflow to release the quality checklist is initiated and the checklist is released. If you select assignees, the checklist is released when the assignees complete their assigned tasks.

The **History** tab shows the version information and other details of the quality checklist.

Assign a due date to checklist objects


You can assign a due date to checklist objects such as, checklist, chapters, questions, and sub-questions.

Procedure

1. Open the required checklist.
2. Select all the required checklist objects.

Example:

You can select either a set of questions or a set of sub-questions at one time. You cannot select a combination of questions and sub-questions.

3. Choose **More Commands** **...** > **Manage**  > **Assign Due Date**.
4. In the **Assign Due Date** panel, specify the required due date and time.
5. Click **Assign**.

Add attachments to the checklist

You can add attachments to checklists.

1. Open the required checklist.
2. Click the **Attachments** tab and click **Add** ⊕.
3. In the **Add** panel, click **Choose File** to select the required file and click the **Add** button.

Note:

The acceptance or rejection of attachments within a checklist is determined by the settings specified in the **AWC_ApmOChecklistDatasetPref** preference by default. If you have personalized the Answer Configuration, you can align this preference with the configured answer settings to initiate the assessment process for attachments.

Specify the sequence of the quality checklists

When you create the checklist specification, the default value of the **Order ID** property of the first checklist that you create is 10. For the subsequent siblings that you create, the value is automatically populated in increments of 10. You can edit the value of these property to modify the sequence of the objects in the checklist.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab and open the required checklist.
Make sure you are in the **Tree** or **Tree with Summary** view.
3. Expand the node of the checklist and its siblings that you want to reorder.

The default value of the **Order ID** property is populated based on the creation sequence.

4. Choose **More Commands** ⋮ > **Edit** > **Summary** ✎.
5. In the **Overview** tab, edit the value of the **Order ID** property to reorder the sequence as required.
6. Choose **More Commands** ⋮ > **Edit** > **Save Edits** 📄.

The sequence of the checklist elements is reordered as per the modified value of the **Order ID** property. The sequencing is maintained when you perform the **Save As** operation or create a new version of the checklist specification.




Note:

If the checklist does not reflect the modified sequence, you can collapse the node in the tree structure and expand it again to refresh the view.

Exclude checklist questions from RYG rating evaluation

You can mark questions as not applicable for RYG rating evaluation to exclude them from the overall checklist calculation.

Procedure

1. Navigate to the required checklist and select the required questions that you want to exclude for evaluation.
2. Choose **More commands ...** > **Manage**  > **Mark as Not Applicable** .
3. In the **Mark as Not Applicable** , select the **Not Applicable** checkbox.
4. Click **Apply**.

The selected question or questions are excluded from the RYG rating evaluation.


Create a new version of a released quality checklist

You can create a new version of a quality checklist.

Prerequisites

The quality checklist must be released.

Procedure

1. On the **Home** page, click the **QUALITY MASTER DATA** tile.
2. Click the **Checklists** tab.
3. Select a released quality checklist.
4. Choose **More Commands ...** > click **New** > **Revise** .
5. In the **Revise** panel, under **PROPERTIES**, select the **Active** check box to create an active checklist.
6. In the **Version Information** box, specify any additional information about the version.


7. Specify the required properties in **Advanced Copy Options**, or retain the default values.
8. Select the **Open New Revision** to open the newly created version as soon as you create it.
9. Click **Save**.

Generate quality checklist reports


Generate a PPA cover sheet report

You can generate a Product Part Approval (PPA) coversheet report that conforms to the standard industry norms. All the values included in the report are derived from the checklist data, responses to the checklist questions, and their corresponding rating values.

Procedure

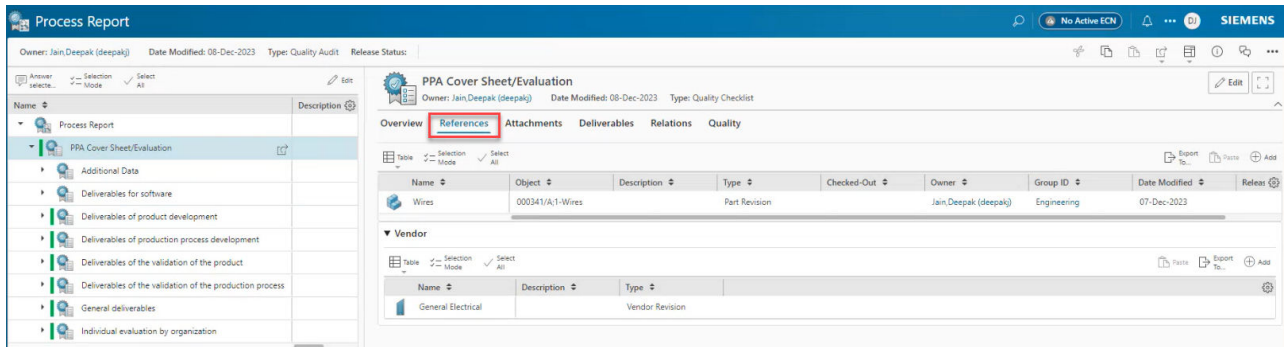
1. Open the required quality checklist.
2. Choose **More Commands** **...** > **Edit**  > **Start Edit**.
3. In the **Overview** tab, specify **Checklist Process Type** and **PPA Reason**.


The screenshot displays the SAP Process Report interface. The main header shows 'Process Report' with owner 'Jain,Deepak (deepakj)', date modified '08-Dec-2023', type 'Quality Audit', and release status. Below this, a navigation pane on the left lists various deliverables under 'PPA Cover Sheet/Evaluation'. The right pane shows the 'PPA Cover Sheet/Evaluation' details, including a tabbed interface with 'Overview' selected. The 'Properties' section contains various fields such as Order ID, ID, Number, Name, Checklist Process Type (highlighted as 'Supplier'), Description, Responsible User, Due Date, State, Checklist Type, Assessment Required, Mandatory, Visible for Vendor, Skip Rating Calculation, PPA Number, Answer, Version, Checklist Area, Industry Standard, Calculation Method, PPA Reason (highlighted with a list of reasons), Comment, Closed Date, Last Modifying User, Parent Checklist, and Master Checklist Reference.

4. Choose **More Commands** **...** > **Edit**  > **Save Edits**.
5. In **References**, add the parts that need approval.

Note:

If you specify the **Checklist Process Type** as **Supplier**, in the **Vendor** section, add the required vendor.



6. Choose **More Commands** **...** > click **New** > **Generate Report** .
7. In the **Generate Report** panel, from **Reports**, select **Process Cover Sheet PPA Report**.
8. Specify the required properties.
9. Click **Generate**.

The PPA cover sheet report is generated. You can also send the PPA cover sheet report to suppliers for review.

Cover Sheet PPA Report		Organization		[Redacted]	
Organization			Reasons for report creation		
			X	Report on production process and product approval	
Customer (recipient)			X	Report on other samples	
Siemens			X	Sample presentation	
Information about the organization		Information about samples		Information about the customer	
Report number	PPA-00010	Delivery note number	DNN 01	Customer	Siemens
Report version	1.0	Delivery quantity	25		
Delivery location	Panchashil Baner	Batch number	Batch 01	Order number PPA samples	
Production location	Pune	Sample weight [kg]	2	Unloading point	
Part Number	LAN 001	Hardware version	HW V 0.7	Part Number	000341
Name	LAN	Diagnosis status	DS Ok	Name	Wires
Drawing number	Drawing 01	Software version	SW V 0.1	Drawing number	
Version / Date	F	Identification/DUNS	DNUS 01	Version / Date	A
Part with special archiving requirement		Hardware approval		Software approval	
Confirmation of organization					
It is hereby confirmed that the PPA procedure was carried out in accordance with the agreements made in the PPA agreement and the specification of VDA volume 2.					
X	The IMDS record was created under the MDS ID No.:			IMDS 01	
Name	ed	Remark	Requirement fully met looking forward to the production of new part		
Department	Quality				
Telephone	1234				
E-mail/Fax	quality@email.com				
Date	12/8/2023	Signature			
Customer decision					
Customer-ready / Ready for series production		X	Not customer-ready / Not ready for series production		
PPA procedure towards customer closed		X	New PPA procedure required		
Updated of PPA documenatation required					
Report number/version Customer		PPA-00010			
Name	Jain, Deepak	Remark			
Department	Quality				
Telephone	7777				
E-mail/Fax	quality@email.com				
Date	12/8/2023	Signature			
This is electronically generated report and this is valid without signature.					

Note:

- When a question on the quality checklist remains unanswered, incomplete, or gets rejected, the PPA cover sheet report indicates that the quality checklist is not ready for the customer and must be completed.

4. Manage a quality checklist template

Cover Sheet PPA Report		Organization		[Redacted]	
Organization			Reasons for report creation		
[Redacted]			X Report on production process and product approval		
Customer (recipient)			X Report on other samples		
Siemens			X Sample presentation		
Information about the organization		Information about samples		Information about the customer	
Report number	PPA-00010	Delivery note number	DNN 01	Customer	Siemens
Report version	1.0	Delivery quantity	25		
Delievery location	Panchashil Baner	Batch number	Batch 01	Order number PPA samples	
Production location	Pune	Sample weight [kg]	2	Unloading point	
Part Number	LAN 001	Hardware version	HW V 0.7	Part Number	000341
Name	LAN	Diagnosis status	DS Ok	Name	Wires
Drawing number	Drawing 01	Software version	SW V 0.1	Drawing number	
Version / Date	F	Identification/DUNS	DNUS 01	Version / Date	A
Part with special archiving requirement		Hardware approval		Software approval	
Confirmation of organization					
It is hereby confirmed that the PPA procedure was carried out in accordance with the agreements made in the PPA agreement and the specification of VDA volume 2.					
X	The IMDS record was created under the MDS ID No.:			IMDS 01	
Name	ed	Remark	Requirement fully met looking forward to the production of new part		
Department	Quality				
Telephone	1234				
E-mail/Fax	quality@email.com				
Date	12/8/2023	Signature			
Customer decision					
Customer-ready / Ready for series production			Not customer-ready / Not ready for series production		
PPA procedure towards customer closed			X		
Updated of PPA documentatation required			X		
Report number/version Customer			PPA-00010		
Name	Jain, Deepak	Remark			
Department	Quality				
Telephone	7777				
E-mail/Fax	quality@email.com				
Date	12/8/2023	Signature			
This is electronically generated report and this is valid without signature.					


- If the quality checklist does not include the vendor's name, the customer sections in the PPA cover sheet report appears blank.

Cover Sheet PPA Report		Organization		Siemens	
Organization			Reasons for report creation		
Siemens			<input checked="" type="checkbox"/> Report on production process and product approval <input checked="" type="checkbox"/> Report on other samples		
Customer (recipient)			<input checked="" type="checkbox"/> Sample presentation <input checked="" type="checkbox"/> Changes to product <input checked="" type="checkbox"/> Change to supply chain		
Information about the organization		Information about samples		Information about the customer	
Report number	PPA-00010	Delivery note number	DNN 01	Customer	
Report version	1.0	Delivery quantity	25	Order number PPA samples	
Delivery location	Panchashil Baner	Batch number	Batch 01	Unloading point	
Production location	Pune	Sample weight [kg]	2	Part Number	
Part Number	000341	Hardware version	HW V 0.7	Name	
Name	Wires	Diagnosis status	DS Ok	Drawing number	
Drawing number		Software version	SW V 0.1	Version / Date	
Version / Date	A	Identification/DUNS	DNUS 01	Software approval	
Part with special archiving requirement		Hardware approval			
Confirmation of organization					
It is hereby confirmed that the PPA procedure was carried out in accordance with the agreements made in the PPA agreement and the specification of VDA volume 2.					
<input checked="" type="checkbox"/>	The IMDS record was created under the MDS ID No.:			IMDS 01	
Name	ed		Remark	Requirement fully met looking forward to the production of new part	
Department	Quality				
Telephone	1234				
E-mail/Fax	quality@email.com				
Date	12/8/2023		Signature		
Customer decision					
Customer-ready / Ready for series production			Not customer-ready / Not ready for series production		
PPA procedure towards customer closed			<input checked="" type="checkbox"/>		
Updated of PPA documentatation required			<input checked="" type="checkbox"/>		
Report number/version Customer			PPA-00010		
Name	Jain, Deepak		Remark	Requirement fully met looking forward to the production of new part	
Department	Quality				
Telephone	7777				
E-mail/Fax	quality@email.com				
Date	12/8/2023		Signature		
This is electronically generated report and this is valid without signature.					

Generate a PPA evaluation report


You can create a Product Part Approval (PPA) evaluation report that shows detailed information of a quality checklist. All the values included in the report are derived from the checklist data, responses to the checklist questions, and their corresponding rating values. The report also includes information on whether each question needs a response, if it meets all the requirements, if there are any attachments, remarks, and so on.

Procedure

1. Open the required quality checklist.
2. Choose **More Commands** **...** > **Edit**  > **Start Edit**.
3. In the **Overview** tab, specify **Checklist Process Type** and **PPA Reason**.

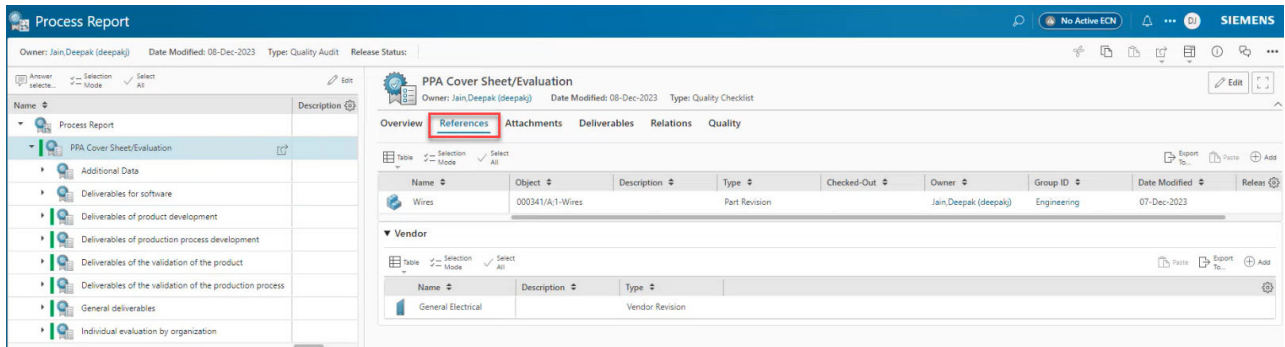
The screenshot displays the SAP Process Report interface for a 'PPA Cover Sheet/Evaluation' checklist template. The interface is divided into a left-hand navigation pane and a right-hand main content area. The left pane shows a tree view of the process report structure, with 'PPA Cover Sheet/Evaluation' selected. The right pane shows the 'Overview' tab of the checklist template, with various properties and fields. The 'Checklist Process Type' is set to 'Supplier', and the 'PPA Reason' field is highlighted with a red box, showing a list of reasons for the checklist.


Property/Field	Value
Order ID:	10.00000000000000
ID:	CHCK000000316
Number:	
Name:	PPA Cover Sheet/Evaluation
Checklist Process Type:	Supplier
Description:	
Responsible User:	
Due Date:	
State:	Ready for vendor
Checklist Type:	Checklist
Assessment Required:	False
Mandatory:	True
Visible for Vendor:	False
Skip Rating Calculation:	False
PPA Number:	PPA-00010
Answer:	No
Version:	1
Checklist Area:	APQP
Industry Standard:	PPAP - VDA2020
Calculation Method:	Summary
PPA Reason:	Report on production process and product approval Report on other samples Sample presentation
Comment:	Requirement fully met looking forward to the production of new part
Closed Date:	
Last Modifying User:	Jain,Deepak (deepakj)
Parent Checklist:	
Master Checklist Reference:	PPA Cover Sheet/Evaluation

4. Choose **More Commands** **...** > **Edit**  > **Save Edits**.
5. In **References**, add the parts that need approval.

Note:

If you specify the **Checklist Process Type** as **Supplier**, in the **Vendor** section, add the required vendor.



6. Choose **More Commands** **...** > click **New** > **Generate Report** .
7. In the **Generate Report** panel, from **Reports**, select **Process Quality Checklist PPA Report**.
8. Specify the required properties.
9. Click **Generate**.

The PPA evaluation report is generated. You can also send the PPA evaluation report to suppliers for review.

4. Manage a quality checklist template

PPA Evaluation		Report Organization		PPA-00010			
Information about the organization		Information about samples		Information about the customer			
Report number	PPA-00010	Delivery note number	DNN 01	Customer	Siemens		
Report version	1.0	Delivery quantity	25				
Delivery location	Panchashil Baner	Batch number	Batch 01	Order number PPA samples			
Production location	Pune	Sample weight [kg]	2	Unloading point			
Part Number	LAN 001	Hardware version	HW V 0.7	Part Number	000341		
Name	LAN	Diagnosis status	DS Ok	Name	Wires		
Drawing number	Drawing 01	Software version	SW V 0.1	Drawing number			
Version / Date	F	Identification/DUNS	DNUS 01	Version / Date	A		
Part with special archiving requirement		Hardware approval		Software approval			
Individual evaluation by organization							
Order Number	Test area	Submission Required	Requirements fully met	Requirements not fully met	Deliverable	Version / Date	Remark
0.1	PPA cover sheet/evaluation	Yes	X		Report 0.2	1	according appendix 3
0.2	Self-assessment for product, process, SW (if appl.)	Yes					Data was not OK, please review
Hardware approval Required							
1. Deliverables of product development							
1.1	Technical specifications	No					
1.2	Approved design changes	Yes	X		Customer confirmation	1	Data reviewed, and OK
1.3	Design, development approvals	No					
1.4	Material data via IMDS	Yes	X		IMDS Document	1	Data reviewed, and OK
1.5	Design FMEA	No					Provided By customer
2. Deliverables of production process development							
2.1	Process flowchart	No					Data

6.9	Documentation of testing tools	No						
6.10	Documentation of version management	No						
6.11	Documentation of a process evaluation (e.g. VDA Automotive Spice)	No						
Part grouping / Product families								
No		PPA procedure for product family			Use Appendix for list of all relevant part numbers if necessary			
Name		PPA Number			Version / Date			
Wires		PPA-00010						
Overall evaluation by organization								
Deliverable category	Submission Required	Requirements fully met	Requirements not fully met	PPA procedure towards customer closed	Updated PPA documentation required	New PPA procedure required	Risk assessment	Version / Date
Individual evaluation by organization	Yes	X		X				
Deliverables of product development	Yes	X		X				
Deliverables of production process development	Yes	X		X				
Deliverables of the validation of the product	Yes	X		X				
Deliverables of the validation of the production process	Yes	X		X				
General deliverables	Yes	X		X				
Deliverables for software	Yes							
Comment of Organization								
Requirement fully met looking forward to the production of new part								
Confirmation of Organization								
Name	ed			Remark	Requirement fully met looking forward to the production of new part			
Department	Quality							
Telephone	1234							
E-mail/Fax	quality@email.com							
Date				Signature				
Customer decision								
Customer-ready / Ready for series production			X	Not customer-ready / Not ready for series production				

Deliverable category	Submission Required	Requirements fully met	Requirements not fully met	PPA procedure towards customer close	Updated PPA documentation required	New PPA procedure required	Risk assessment	Version / Date
Individual evaluation by organization	Yes	X		X				
Deliverables of product development	Yes	X		X				
Deliverables of production process development	Yes	X		X				
Deliverables of the validation of the product	Yes	X		X				
Deliverables of the validation of the production process	Yes	X		X				
General deliverables	Yes	X		X				
Deliverables for software	Yes							
Comment of Organization								
Requirement fully met looking forward to the production of new part								
Confirmation of Organization								
Name	ed			Remark	Requirement fully met looking forward to the production of new part			
Department	Quality							
Telephone	1234							
E-mail/Fax	quality@email.com							
Date				Signature				
Customer decision								
Customer-ready / Ready for series production				X	Not customer-ready / Not ready for series production			
PPA procedure towards customer closed				X	New PPA procedure required			
Updated of PPA documentation required								
Report number/version Customer				PPA-00010				
Name	Jain, Deepak			Remark				
Department	Quality							
Telephone	7777							
E-mail/Fax	quality@email.com							
Date				Signature				
This is electronically generated report and this is valid without signature.								

Note:

- When a question on the quality checklist remains unanswered, incomplete, or gets rejected, the PPA evaluation report indicates that the quality checklist is not ready for the customer and must be completed.

		S	Re	Re	nc	D		
0.1	PPA cover sheet/evaluation	Yes	X			Report 0.2	1	according appendix 3
0.2	Self-assessment for product, process, SW (if appl.)	Yes						Data was not OK, please review
Hardware approval Required								
1. Deliverables of product development								
1.1	Technical specifications	No						
1.2	Approved design changes	Yes	X			Customer confirmation	1	Data reviewed, and OK
1.3	Design, development approvals	No						
1.4	Material data via IMDS	Yes	X			IMDS Document	1	Data reviewed, and OK
1.5	Design FMEA	No						Provided By customer
2. Deliverables of production process development								
2.1	Process flowchart	No						
2.2	Process FMEA	Yes		X		P-FMEA	1	Data was not OK, please review
2.3	Control plan (CP)	No						
3. Deliverables of the validation of the product								
3.1	Geometry, dimensions	Yes	X			Dimension Document	1	Data reviewed, and OK
3.2	Material (strength, physical properties, etc.)	No						
3.3	Function	No						
3.4	Haptics	No						
3.5	Acoustics	No						
3.6	Odor	Yes	X			Oder Document	1	Data reviewed, and OK
3.7	Appearance	No						
3.8	Surface requirement	Yes	X			Surface Document	1	Data reviewed, and OK

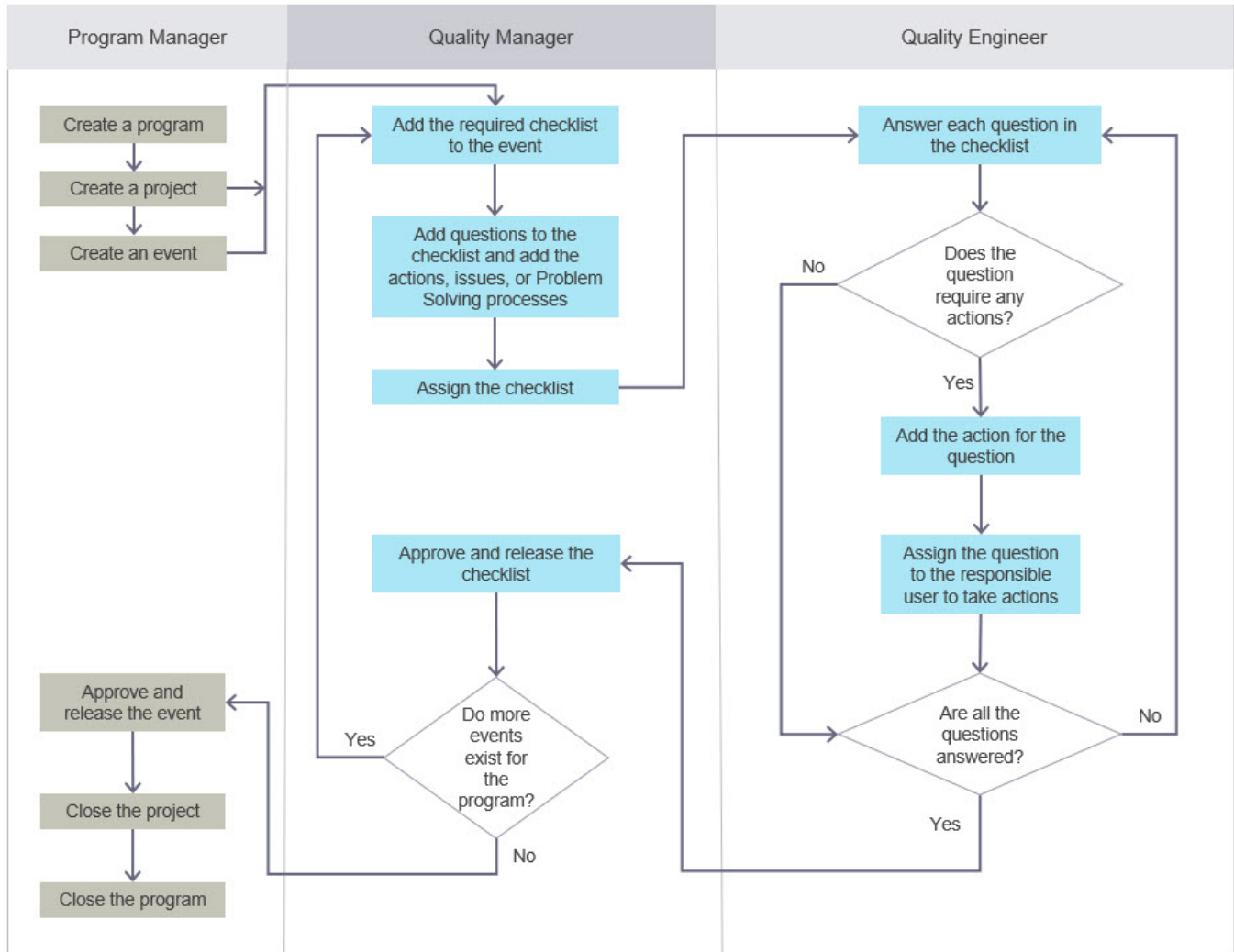
- If the quality checklist does not include the vendor's name, then the customer sections in the PPA evaluation report appears blank.

4. Manage a quality checklist template

PPA Evaluation		Report Organization		PPA-00010 Siemens			
Information about the organization		Information about samples		Information about the customer			
Report number	PPA-00010	Delivery note number	DNN 01	Customer			
Report version	1.0	Delivery quantity	25	Order number PPA samples			
Delivery location	Panchashil Baner	Batch number	Batch 01	Unloading point			
Production location	Pune	Sample weight [kg]	2	Part Number			
Part Number	000341	Hardware version	HW V 0.7	Name			
Name	Wires	Diagnosis status	DS Ok	Drawing number			
Drawing number		Software version	SW V 0.1	Version / Date			
Version / Date	A	Identification/DUNS	DNUS 01	Software approval			
Part with special archiving requirement		Hardware approval					
Individual evaluation by organization							
Order Number	Test area	Submission Required	Requirements fully met	Requirements not fully met	Deliverable	Version / Date	Remark
0.1	PPA cover sheet/evaluation	Yes	X		Report 0.2	1	according appendix 3
0.2	Self-assessment for product, process, SW (if appl.)	Yes					Data was not OK, please review
Hardware approval Required							
1. Deliverables of product development							
1.1	Technical specifications	No					
1.2	Approved design changes	Yes	X		Customer confirmation	1	Data reviewed, and OK
1.3	Design, development approvals	No					
1.4	Material data via IMDS	Yes	X		IMDS Document	1	Data reviewed, and OK
1.5	Design FMEA	No					Provided By customer
2. Deliverables of production process development							
2.1	Process flowchart	No					
							Data was not

5. Manage a checklist

Task flow to manage a checklist



Consider a scenario where an automotive company develops a new brake pad for their latest car model. The program manager creates an event *Precision Brake Launch*, in a program *Advanced Braking Solutions Initiative*. In this event, the quality manager creates a checklist *Brake Pad Design and Manufacturing* and includes specific questions related to the brake pad's design and manufacturing process. Some of the questions in the checklist are as follows:

1. Is the brake pad's heat resistance within the specified range?
2. Are the brake pad's wear indicators functioning correctly?
3. Has the brake pad been tested for noise and vibration levels?

The quality manager assigns the checklist to the quality engineer, who answers each question in the checklist as yes, no, and not applicable.

While answering each question, the quality engineer can also add issues, actions, and Problem Solving processes and assign each of these to the responsible user. For example, for the question, "Is the brake pad's heat resistance within the specified range?" the quality engineer found that the break pad's heat resistance is 1195 °F, which is almost near the higher value of the standard range, that is, 800 °F to 1200 °F. So, the quality engineer reassigns the question to the material engineer, with an action to review the heat resistance of the brake pad.

After answering all questions, the quality engineer sends the checklist for approval to the quality manager. The quality manager then reviews, approves, and releases the checklist.

Create a checklist in an event

You can create a checklist (Program Checklist) in an event.

1. Open the program and click the **Events** tab.
2. Open the event to which you want to add the checklist, and click the **Quality** tab.
3. Choose **More Commands** **...** > **New** **✳** > **Add** **⊕**.
4. In the **Add** panel, specify the required properties.
5. Click **Add**.

You can now add questions to the checklist.

Add a quality checklist to an event

You can add an existing checklist (Quality Checklist) to an event. You can use and modify the questions available in the existing checklist as needed.

The existing checklist must be available in the Quality Master Data library. If you do not see any checklist in the **Add Quality Checklist** panel, **you must add a checklist in the Quality Master Data library**.

Procedure

1. Open the program and click the **Events** tab.
2. Open the event to which you want to add the checklist, and click the **Quality** tab.
3. Choose **More Commands** **...** > **New** **✳** > **Add Quality Checklist** **⊕**.

4. In the **Add Quality Checklist** panel, specify the required properties.
5. Click **Add**.

Add a quality checklist to a project or program

You can add an existing quality checklist to a project or program. You can modify the questions or use them as is.

The existing checklist must be available in the Quality Master Data library. If you do not see any checklists in the **Add Quality Checklist** panel, **add a checklist in the Quality Master Data library**.

Procedure

1. Open the project or program and click the **Quality** tab.

The screenshot displays the Siemens Teamcenter interface for a 'Program' entity. The top navigation bar includes 'Program', 'No Active ECN', and the Siemens logo. Below this, a toolbar contains various icons for editing and viewing. The main area is divided into several sections:

- Plan Levels:** A table listing 'Program' and 'Project' items, all with a state of 'Not Start...'.
- Timeline:** A Gantt chart view for October 2024, showing dates from 25 Oct to 29 Oct.
- Navigation Tabs:** A row of tabs including 'Overview', 'Campaigns', 'Business Case', 'Governance', 'Events', 'Changes', 'Deliverables', 'Schedules', 'Risks', 'Issues', 'Opportunities', 'Assignment Matrices', 'Rules of Credits', 'Attachments', and 'Quality'. The 'Quality' tab is highlighted with a red box.
- RYG Rating:** A section showing 'Program Rating' as 'Red' with a fulfillment rate of 0.
- Project Checklists:** A table with columns for Name, Description, State, Comment, Due Date, Responsible User, and a 'New' button.
- Event Checklists:** A section for managing event-related checklists.

2. In the **Project Checklists** section, click **Add Quality Checklist** (+).

3. In the **Add Quality Checklist** panel, select the required quality checklist.
4. Click **Add**.

Add a question to the checklist

Once you create a checklist in an event, you must add questions to it.

Procedure

1. Open the program and click the **Events** tab.
2. Open the event and click the **Quality** tab.
3. Select the checklist to which you want to add the questions, click **Questions** tab, and click **Add**.
4. In the **Add** panel, select **Checklist Question**, under **Type**.
5. Specify the required properties.
6. Click **Add**.





The question is added to the checklist. If you want to add more questions, repeat **3** through **6**.

Assign a due date to the checklist

You can assign a due date to the checklists in an event.



The Quality Engineer can then view and track the checklists assigned to them in their calendar.

Procedure

1. Open the program and click the **Events** tab.
2. Open the event and click the **Quality** tab.
3. Select the checklist to which you want to assign the due date, and click the **Overview** tab.
4. Choose **More Commands** ... > **Edit**  > **Summary** .
5. Specify the required **Due Date**.
6. Choose **More Commands** ... > **Edit**  > **Save Edits** .

Assign the checklist to the user

The checklist must be assigned to the quality engineer so they can answer the questions in it.

1. Open the program and click the **Events** tab.
2. Open the event to which you want to assign the quality engineer, and select the required checklist in the **Quality** tab.
3. Choose **More Commands** ... > **Manage**  > **Assign Resource** .
4. Select the appropriate user and click **Assign**.

Answer the questions in a checklist

You, as a quality engineer, must answer all the questions in the assigned checklist.

Procedure

1. Open the checklist assigned to you.
2. Select the question that you want to answer.
3. Click on the **Answer** list, and select your answer.

Based on your answer to the question, **the RYG (red, yellow, green) ratings indicate the status of the question** and are automatically assigned to each question.

For example, based on the default rules, if you answer a question with a *no*, the RYG rating becomes red. Further, if there is any issue or action associated with it, it becomes yellow. Similarly, if the answer is a *yes*, the RYG rating becomes green.

- Repeat this step for all the questions.

While answering each question, you can also add **issues**, **actions**, and **Problem Solving processes** and **re-assign them to the responsible user**.

Viewing status of a checklist

The red, yellow, green (RYG) ratings at the program, project, subproject, event, checklist, and question indicates their status. When you answer each question in the checklist, the RYG rating is automatically assigned to each question. These ratings then roll up to the checklist, the event, the project, and finally to the program.

For example, consider a checklist with the required questions. The possible answers for all the questions are no, yes, and not applicable.

The default RYG ratings for the answers are as below:

- For questions with answer no, the RYG rating color is assigned as red.
- For questions with answer not applicable, the RYG rating color is assigned as yellow.
- For questions with actions and answer as yes or no, the RYG rating color is assigned as yellow.
- For questions with answer yes, the RYG rating color is assigned as green.

While answering, the quality engineer may find some issues so they can add issues, actions, or Problem Solving processes to the question and can reassign the question to the responsible user.

The following table shows how the RYG color is assigned for each question when the quality engineer answers it.

Checklist Question	Answer	Action taken by the quality engineer	Issues, actions, Problem Solving processes	RYG rating
Has the brake pad been tested for noise and vibration levels?	No	Reassigns the question to the testing engineer.	No	Red
Are the brake pad's wear and tear indicator functioning correctly?	No	Adds an action to inspect and correct the wear and tear indicator to ensure they function	Yes	Yellow

Checklist Question	Answer	Action taken by the quality engineer	Issues, actions, Problem Solving processes	RYG rating
		as intended They reassign the question to a design engineer.		
Has the brake pad been tested for vibration levels?	Yes	No action required.	No	Green

Number	Name	Answer	State	Responsible User	Comment	Due Date
1	Has the brake pad been tested for n...	No	New	Thomas Test (thomas)		
2	Are the brake pad's wear indicators f...	No	New	Ed DesignEngineer (ed_de)		
3	Has the brake pad been tested for vi...	Yes	New			

Each checklist can have multiple questions. The RYG ratings of the questions roll 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 rating 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.

Similarly, each event can have multiple checklists. The RYG ratings of the checklists roll over to the event to indicate the status of the event. For example, if all the checklists are green or have null values, the RYG object of the event becomes green. The RYG object of the event becomes yellow or red if one of the checklists is yellow or red, respectively. Similarly, a plan can have multiple events. The RYG ratings of the events are rolled over to the plan, and its status is similar to events.

By default, the RYG ratings of the checklists are rolled over to the event, and from the event, to the program. However, there are some exceptions. The evaluation is done only for mandatory questions based on the default rules.

Override the RYG rating for a checklist


The RYG ratings of the checklists are rolled over to the event, from the event to the subproject, from the subproject to the project, and so on. If an event or a subproject is not significant to the overall project or program, the quality manager can manually override the automatic RYG rating of the checklist associated with the event and set it manually. You can override the RYG color for an event, subproject, or project in a similar manner.

Procedure

1. Open the required checklist.

- Click the **Quality** tab and open the RYG object from the **RYG RATING** section.

The system displays the ratings depending on how the questions were answered.

- Choose **More Commands** **...** > click **Edit**  > **Start Edit**.
- Select the appropriate color for the rating.
- To exclude the parent of this object from the RYG rating, select the **Override Automatic Rollup** check box.

By default, this check box is not selected when you associate an RYG object for the first time.

In this example, if you want the checklist to be excluded from the RYG rating of the event, select this check box. After applying the changes, if you want the parent to be included in the RYG rating, edit the RYG object and clear this check box.

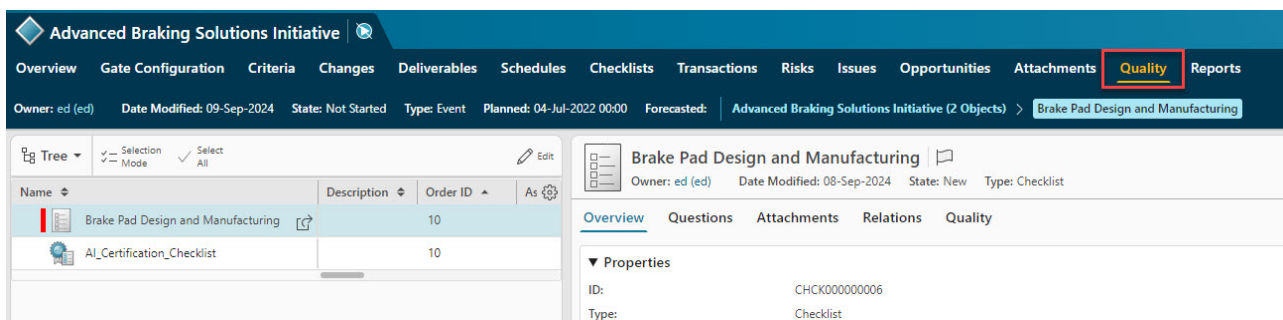
- Choose **More Commands** **...** > click **Edit**  > **Save Edits**.

Add issues to the checklist

You can add an issue such as a complaint or a defect in the checklist. These issues impact the overall effectiveness and accuracy of the checklist.

Procedure

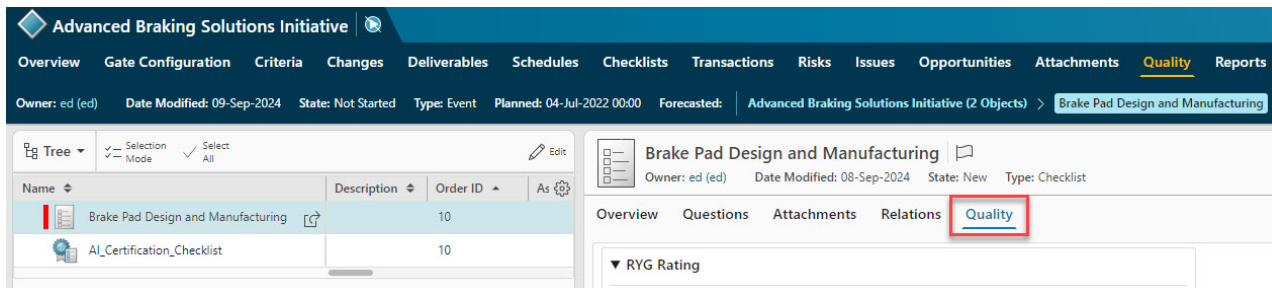
- Open the program and click the **Events** tab.
- Open the event, click the **Quality** tab.



The screenshot shows the SAP Teamcenter interface for the 'Advanced Braking Solutions Initiative'. The 'Quality' tab is selected in the top navigation bar. The main content area displays the 'Brake Pad Design and Manufacturing' checklist. The 'Properties' section shows the ID as 'CHCK000000006' and the Type as 'Checklist'.

Name	Description	Order ID	As
Brake Pad Design and Manufacturing		10	
AI_Certification_Checklist		10	

- Select the required checklist and click the **Quality** tab.



4. Choose **More Commands** \dots > **New** \star > **Create Change** \triangle .
5. In the **Create Change** panel, select the required issue from the list.
6. Specify the required properties, and click **Create**.

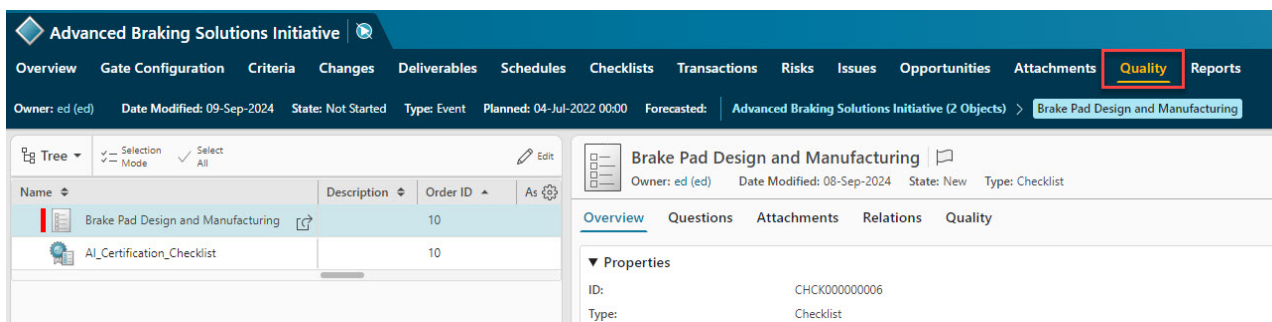
The issue is added to the checklist.

Add Problem Solving processes to the checklist

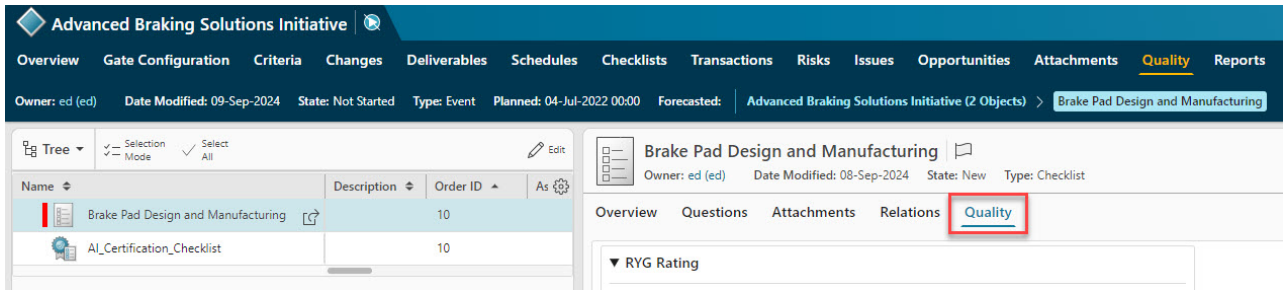
You can add the Problem Solving processes to resolve any issue in the checklist.

Procedure

1. Open the program and click the **Events** tab.
2. Open the event, click the **Quality** tab.



3. Select the required checklist and click the **Quality** tab.



4. Choose **More Commands** \dots > **New** \star > **Create Change** \triangle .
5. In the **Create Change** panel, type **Problem Solving** in the **Type** field.
6. Select **Problem Solving**, and specify the required properties, and click **Create**.

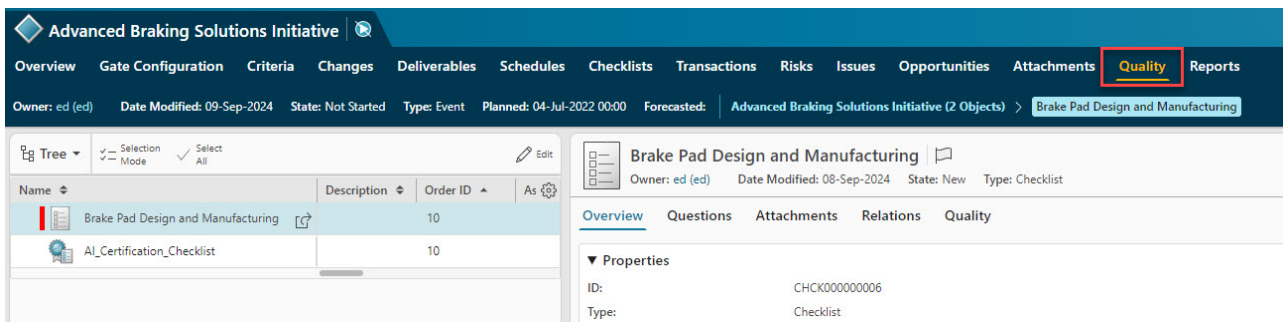
The Problem Solving process is added to the checklist.

Add quality actions to the checklist

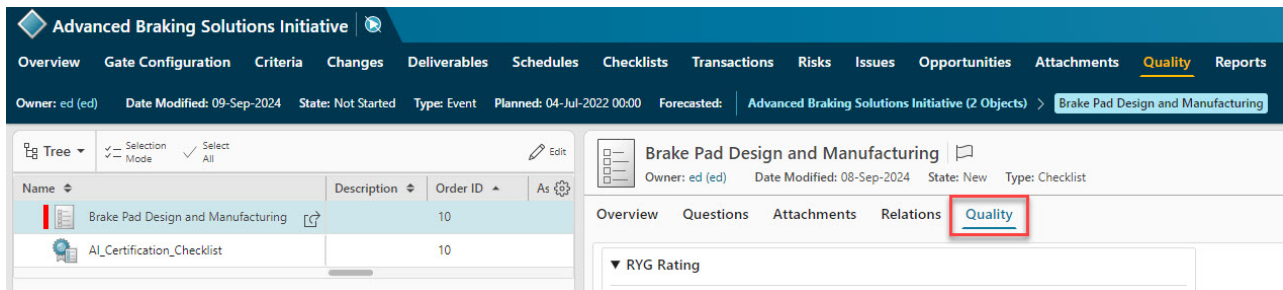
You can add a quality action to execute and track any specific task in the checklist.

Procedure

1. Open the program and click the **Events** tab.
2. Open the event, click the **Quality** tab.



3. Select the required checklist and click the **Quality** tab.



4. Under **Quality Action** section, click **Add to** ⊕.
5. Select the required type of quality action and in the displayed panel, specify the properties.

For more information about creating different types of quality action, see create a quality action in the *Quality Actions* of the Teamcenter documentation.

6. Click **Add**.

Assign the questions to the responsible user

As a quality engineer, if you find any question that has an issue or needs to be checked by someone else, you can assign these questions to the responsible user.

Procedure


1. Open the program and click the **Events** tab.
2. Open the event, click the **Quality** tab, and select the checklist.
3. Select the question in the checklist to which you want to assign the responsible user.
4. Choose **More Commands** ⋮ > **Manage** ⚙ > **Assign Resource** 👉.
5. Select the appropriate user and click **Assign**.

Delete a checklist

Before you delete a checklist, ensure that you have deleted any RYG ratings associated with the checklist.

Procedure

1. Open the required checklist.
2. Open the program and click the **Events** tab.

3. Open the event, click the **Quality** tab, and select the required checklist.
4. Choose **More Commands** **...** > **Edit**  > **Delete**.


Note:

When you delete a checklist, all the questions within the checklist is also deleted.

6. Edit the properties of a checklist

You can edit the properties of the checklist to specify properties such as the **Industry Standard**, **Calculation Method**, or **Order ID**. You can set the **AWC_Apm0ModifyAssessmentRequiredAndMandatoryProp** preference to specify if you want the status of the **Assessment Required** and **Mandatory** properties to be editable.

Procedure

1. Open the checklist that you want to edit.
2. Click **Edit** .
3. In the **Overview** tab, modify the required properties.

Note:

For more information about these properties, see Field definitions for checklist properties.

4. Click **Save Edits** .

7. View and track your programs in the calendar

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

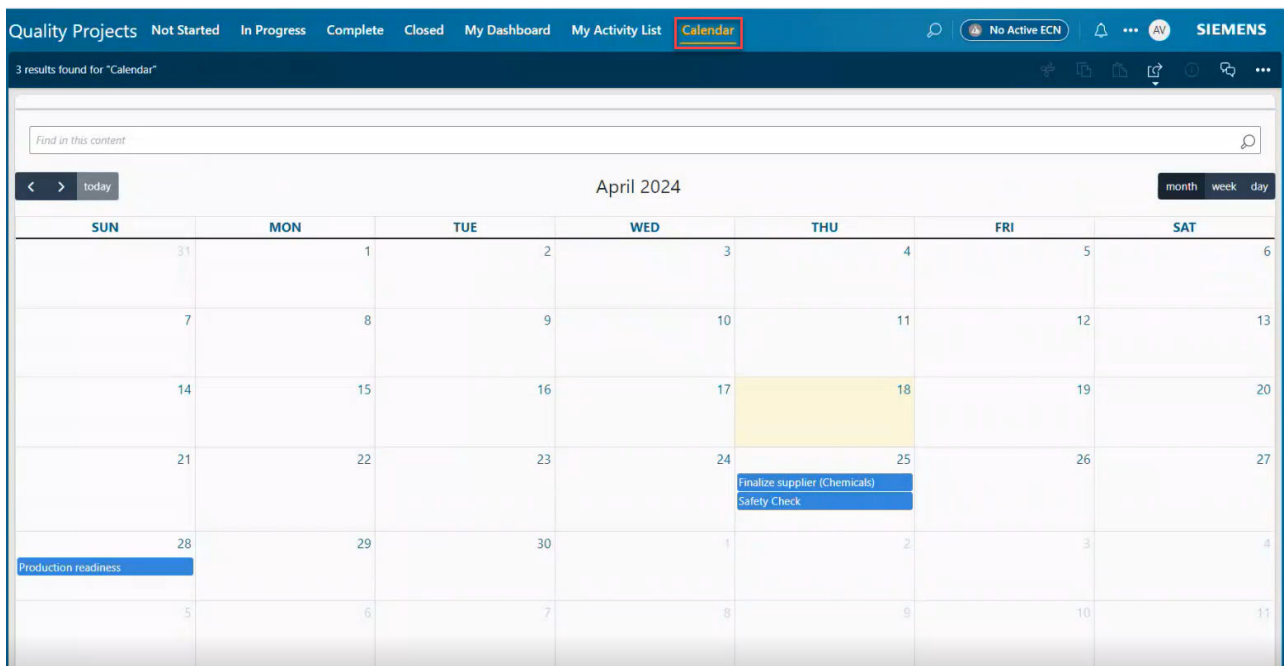
Prerequisites

- You must create a program and specify the **Targeted End** for that program.
- You must have access to the **Quality Management** workspace.

Procedure

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

The calendar displays all the audits created by you.



8. Manage your activity list

The **My Activity List** page displays all the quality actions that are assigned to you across all the events in all programs.

Prerequisites

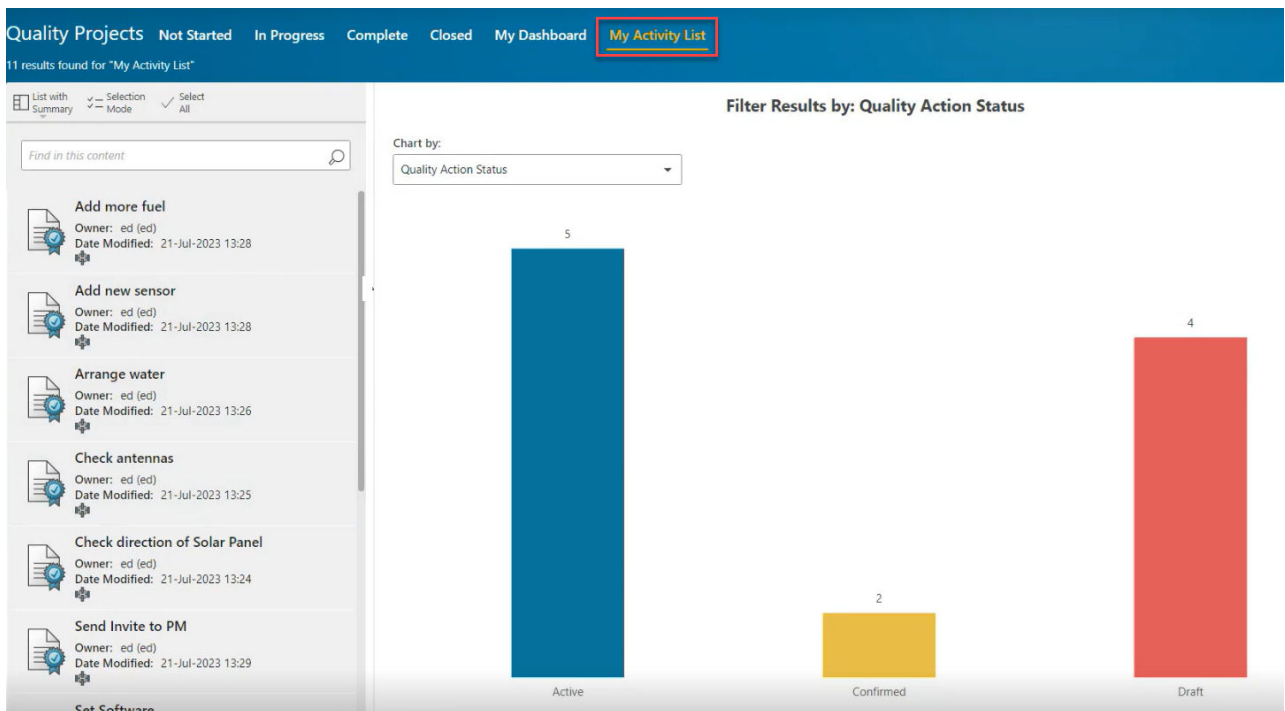
To manage this list, you must have created a program and added an event to the program. Additionally, a **checklist** and a quality action to a checklist must be added to the event in the program. Then, a user must be assigned to the quality action.

Note:

- To view the quality actions on the **My Activity List** page, you must be assigned to the quality actions.
- The quality actions are not displayed on the **My Activity List** page if the quality action is in the **Completed** or **Cancelled** state.

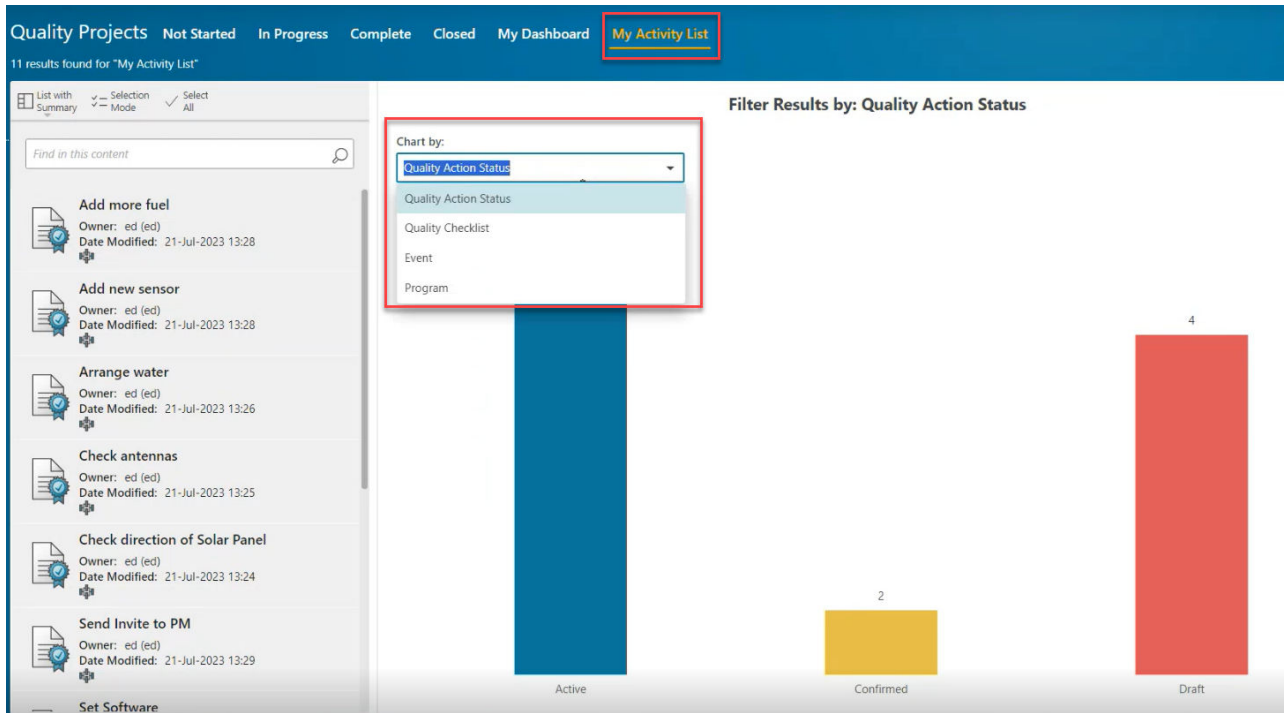
Procedure

1. In the **Quality Management** workspace, click the **QUALITY PROJECTS** tile.
2. Click the **My Activity List** page.



This page displays all the quality actions assigned to the logged-in user.

You can filter your listed actions as required.



You can open and modify your actions page.

The screenshot shows the detail view for an 'Active' quality action. The left sidebar shows a list of actions, with the 'Active' action selected and highlighted in blue. A red box highlights the edit icon (a pencil) next to the selected action. The main content area shows the details for the 'Active' action, including the responsible user, due date (27-Sep-2023 00:00), and quality action status (Active). Below this, there are tabs for 'Overview', 'Attachments', 'Where Used', and 'Workflow'. The 'Where Used' tab is active, showing a table with columns: Object, Type, Checked-Out, Owner, and Date Modified. The table contains one entry: Object 't', Type 'Quality Checklist', Checked-Out, Owner 'ed (ed)', and Date Modified '06-Sep-2023'.

Object	Type	Checked-Out	Owner	Date Modified
t	Quality Checklist		ed (ed)	06-Sep-2023

9. Share the checklists and checklist questions with other sites in a Multi-Site Collaboration network

After creating a quality checklist, a program checklist, and a checklist questions 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 share it with the required sites. Then, specify additional sharing details, such as the destination sites and several transfer options.



Prerequisites

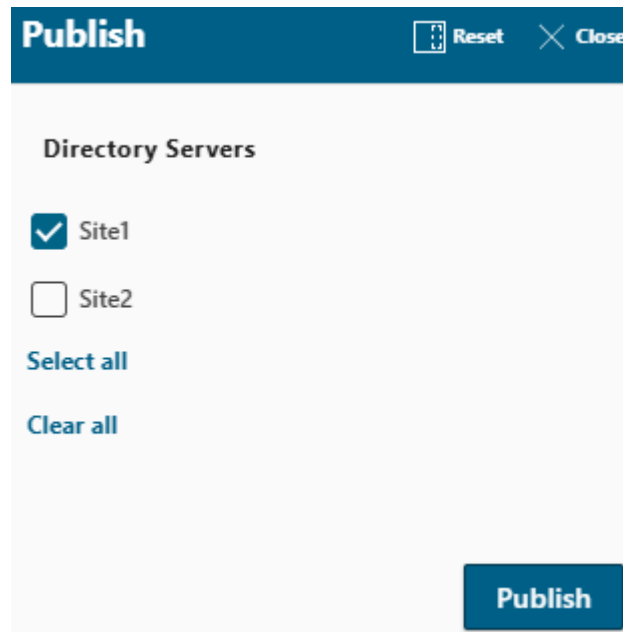
- The administrator has installed and configured Multi-Site Collaboration for all sites in your network.
- The administrator has enabled the checklist and questions for publishing and transferring to other sites.


Procedure



1. Open the quality checklist, program checklist, or checklist question that you want to share.


If you are working in the **Quality Management** workspace, click the **CHECKLISTS** tile, and select and open the required quality checklist, program checklist, or checklist question.



2. To publish the quality checklist, program checklist, or checklist questions, 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 checklist, program checklist, or checklist question, the globe with a share symbol  appears next to the name of the checklist or checklist question.

3. To cancel publishing a quality checklist, program checklist, or checklist questions, 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 checklist, program checklist, or checklist question, the globe with a share symbol  is removed from the name of the checklist or checklist question.

4. To share the quality checklist, program checklist, or checklist questions, 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 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 checklist, program checklist, or checklist questions only when it has been modified since the last time it was exported to the destination site, select **Modified Only**.
- e. To share related data, from the **Relations** list, select each object relation to share with the destination sites.

Example:

You can choose to share the checklist deliverables and checklist reference to share with the checklist.

- f. To transfer the site ownership of the quality checklist, program checklist, or checklist questions to the destination site, select **Transfer Site Ownership**.

When you transfer the site ownership, all revisions of the quality checklist, program checklist, or checklist questions, are shared.

Share with Sites

Reset Close

*** Destinations:**

Site-4

Option Set:

MultiSiteExpOptSet

Transfer Site Ownership

Modified Only

Relations:

Quality Checklist Deliverables, Quality Checklist Refer...

▼ Owner

↔ Replace

infodba

► Option Overrides

Share

- g. (Optional) Change the owner of the transferred quality checklist, program checklist, or checklist questions 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 checklist, program checklist, or checklist questions at a time. The site with ownership can modify the quality checklist. The other sites contains a replica of the quality checklist.

- 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 checklist, program checklist, or checklist questions with the destination sites.

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

- j. If you make updates to the quality checklist, program checklist, or checklist questions, you can share the updates with the destination site by repeating steps **a** through **i**.

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

- 5. After you receive an email or notification message about the shared quality checklist, program checklist, or checklist questions, in the destination site, to access the quality checklist, program checklist, or checklist questions, do the following:
 - a. In **Advanced Search**, select **General**, and then **Quality Checklist** as the type of search, and click **Search**.
 - b. In the search results, select the shared quality checklist, and open it to work on it.