TEAMCENTER

Training and Qualification

Teamcenter 2412

SIEMENS

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Contents

1. About Training and Qualification

Training and Qualification, a part of the Teamcenter Quality suite of products, helps you manage the training and qualification requirements of people and certification of equipment and gauges. When an employee takes a course or certification or reads a document for a certain subject or area (for example, solar installation or welding), a *qualification record* is created in the employee's *qualification profile*. You can certify equipment and gauges for a particular capacity or calibration and record the certification in the qualification records in the equipment's qualification profile. You can open the qualification profile and view the details of the qualification records. The qualification profiles are used to capture the certification of equipment and the qualification of employees who take the training (courses and certifications).

After you create the qualification profiles and the *qualification units* for the available certifications and trainings, you can assign the required certification or training to the equipment or employee. A qualification record is created to track the progress of the equipment and the employees during the certification or training process.

Example:

Consider a scenario where your company is a warehousing and distribution service provider. Customers can drop off or ship their products to several warehouses for storage in different locations. The company uses forklift operators to safely store these products in the warehouses. These forklift operators must complete the Class I to Class V Occupational Safety and Health Administration (OSHA) certifications to be eligible to work in the warehouses. As the Training Coordinator, you must create the following:

- Qualification units for the OSHA certifications for Class I to Class V
- Qualification profiles for the forklift operators of each class

Using Training and Qualification, in Teamcenter, you can create qualification units and qualification profiles to manage the qualifications of the forklift operators. As the OSHA certifications are valid for a period of three years, you can specify the qualification units' renewal period as three years.

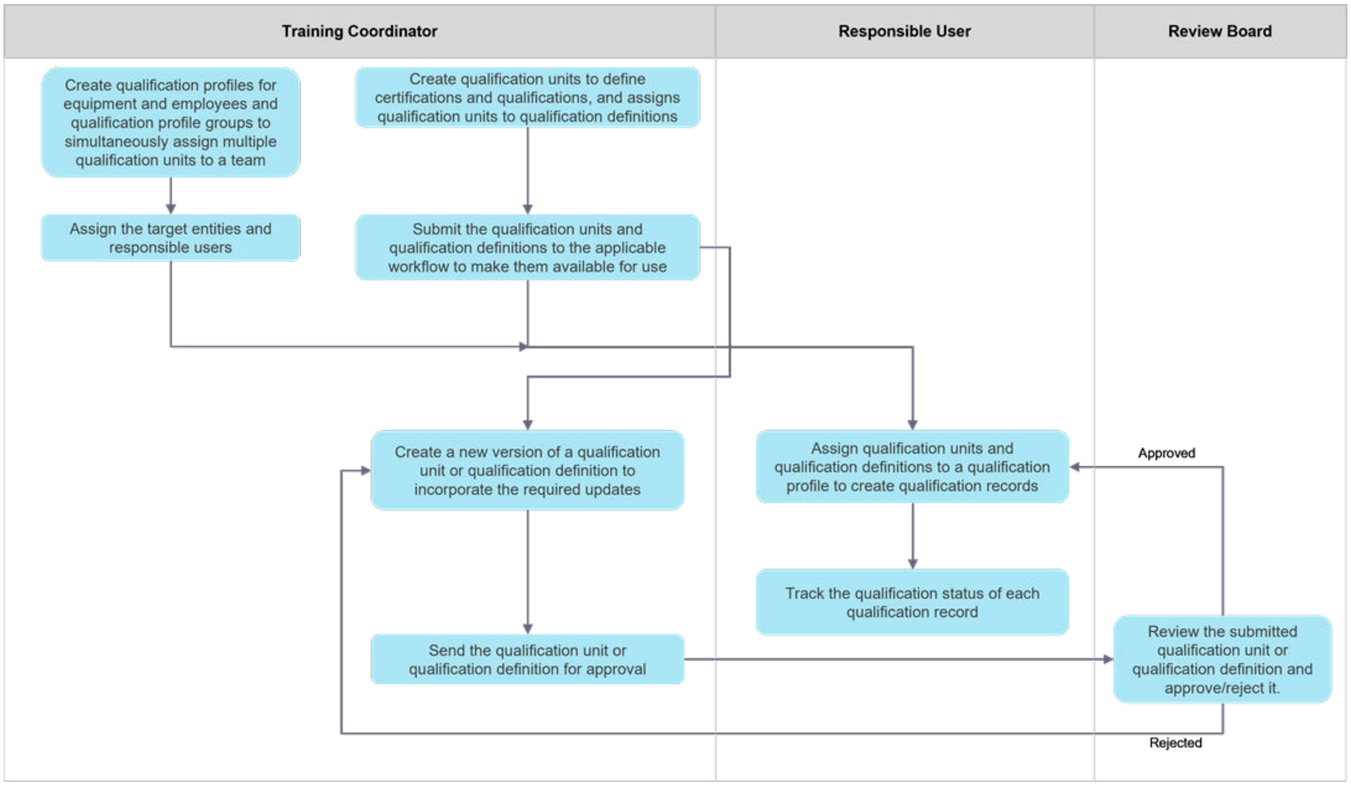
Next, you assign the qualification units to the required qualification profiles to track their progress and ensure that they are certified.

Where do I go from here?

Administrator	To know which features are required to install Training and Qualification, see the *Install Training and Qualification* section of *Teamcenter Quality — Deployment and Administration*.
Training Coordinator	
What are the first steps in getting started with Training and Qualification in Teamcenter?	You can start by creating the **qualification units** and **qualification profiles**.
After creating the qualification profiles and qualification units, what are the next steps in Teamcenter?	You can **assign qualification units to a qualification profile to create qualification records** as a next step. You can also create **qualification definitions** to define a job position, and use **qualification profile groups** to simultaneously assign multiple qualification units to a group of qualification profiles.
How can you ensure that your equipment and employees are certified to perform their jobs?	To do this, **track the completion status of each equipment and employee.**
If the existing training needs to be updated, what can I do?	You can submit the qualification units and qualification definitions for review to the review board. After the review is complete, you can implement their comments **by creating a new version of a qualification unit or qualification definition**.

2. Training and Qualification business process

The following graphic shows the sequence of tasks required to manage the Training and Qualification business process:



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

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

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

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

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

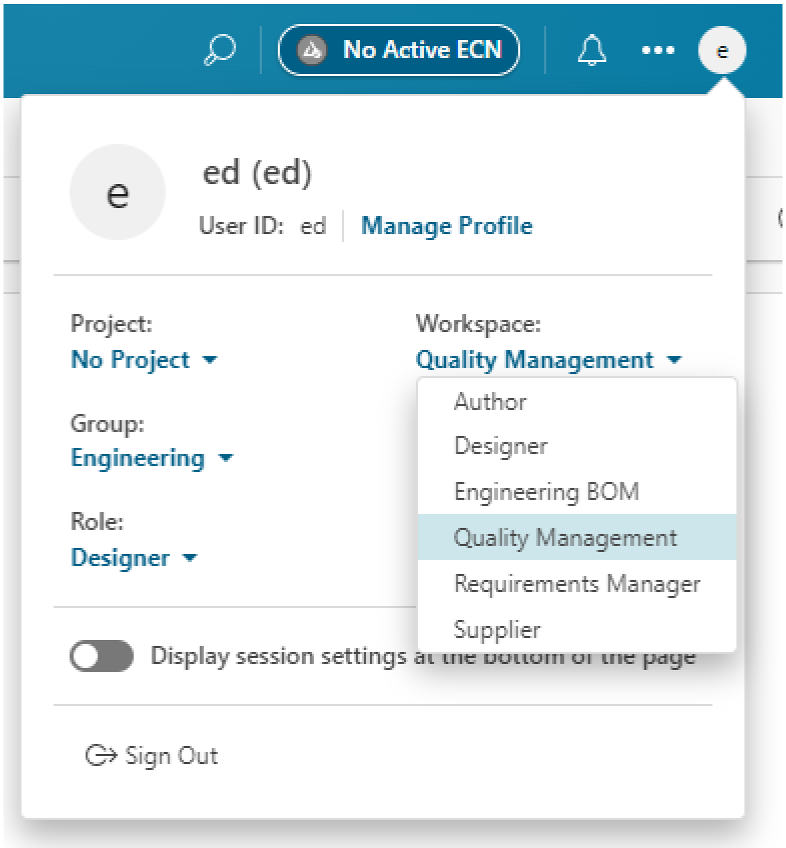
- View the dashboard for the application including the quality master data.
- Search for and filter your search results as required.
- Access other applications, such as Assistant, Discussions, Programs, and Schedules, on the global navigation toolbar.

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

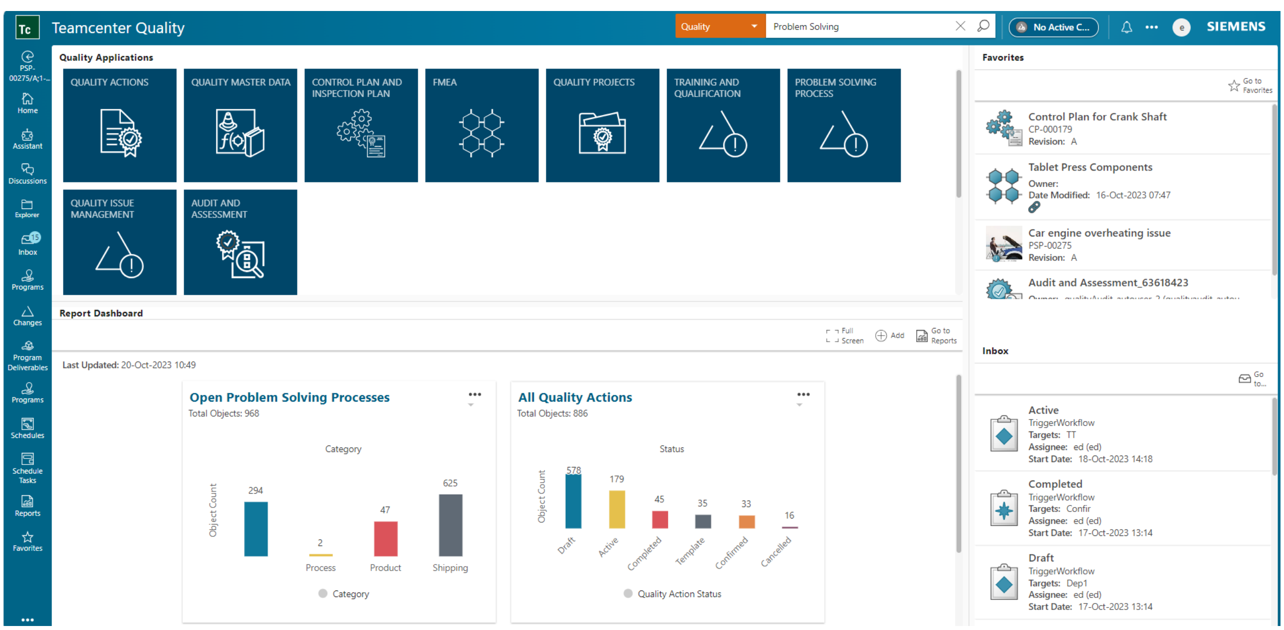
For more information about workspaces, see *Learn about workspaces* in *Active Workspace Customization* of the Teamcenter documentation.

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

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



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



4. Managing qualification units

Create a qualification unit

A *qualification unit* defines a training or a certification that must be completed by a person or that is specified for an equipment. You can attach multiple training materials to the qualification unit and specify its renewal period for refresher training and certification renewal. You can also define the cost and duration for the qualification unit, specify if an effectiveness review is required, and delay the release of the qualification unit if the training has a new syllabus or an updated version.

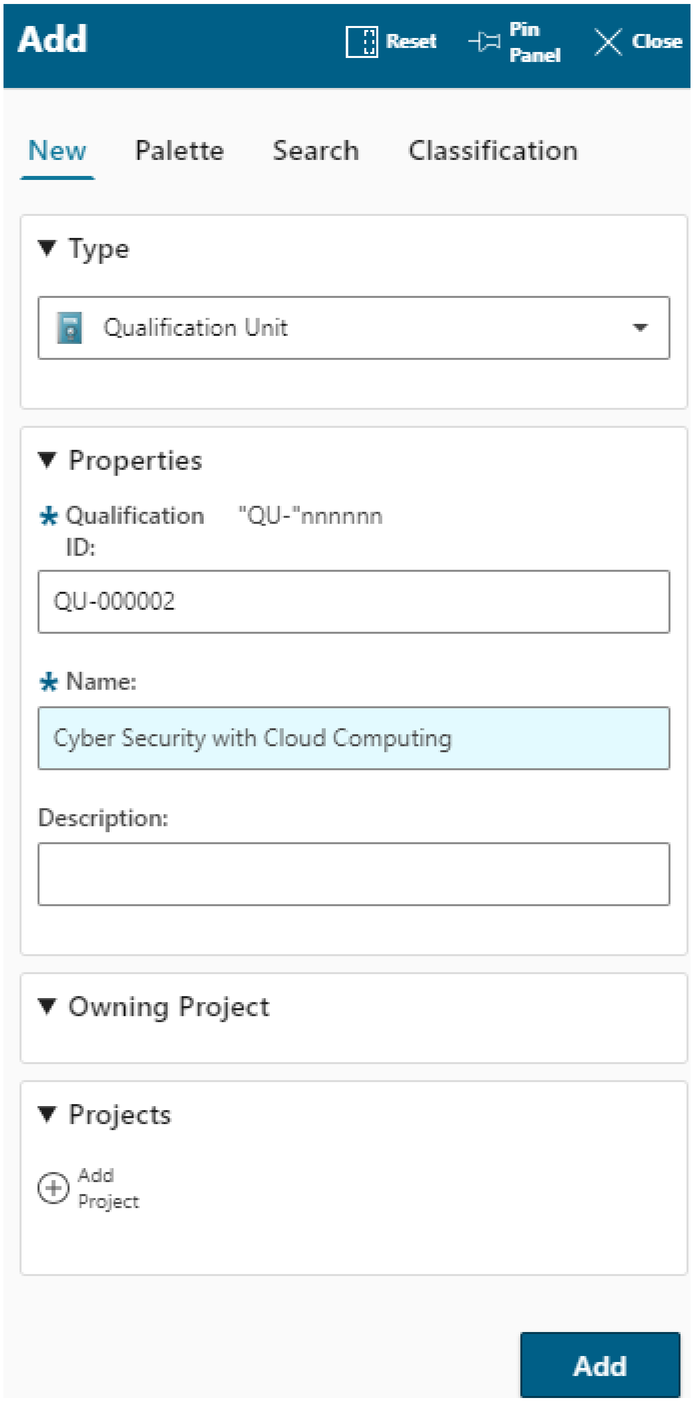
1. On the **HOME** page, click the **EXPLORER** tile, and navigate to the folder where you want to create the qualification unit.

2. Choose **More Commands** ••• > **New** > **Add**.

3. In the **Add** panel, select **Qualification Unit**.

4. In the **Name** box, type a name for the qualification unit.

5. In the **Description** box, describe the qualification unit.



6. Click **Add**.

7. In the **Contents** tab, add training content to the qualification unit as follows:

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

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

OR

You can also create a Teamcenter file or search for an existing Teamcenter file, and attach it.

c. To replace the attached training content with an updated version, select it, and choose **More Commands** ••• > **Edit** > **Replace File**.

d. In the **Replace** panel, click **Select File** to browse to and select the replacement file, and click **Replace**.

e. If the attached training content is no longer relevant, select it, and choose **More Commands** ••• > **Edit** > **Delete**.

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

Modify a qualification unit

You can edit a qualification unit and update its details. You can also specify if you want the assigned employee to perform an effectiveness review for the qualification unit after they complete it. By default, effectiveness review is mandatory. You can also specify the time by which they must complete the effectiveness review.

Procedure

1. On the **HOME** page, click the **EXPLORER** tile.
2. Select the required qualification unit, and choose **More Commands** ••• > **Edit** > **Start Edit**.

Field	Description
Qualification Type	Various options of training that the individual can obtain.
Qualification Period (days)	Number of days available to the assignee to complete the qualification unit.
Effectiveness Review Required	Option to specify if you require an effectiveness review for the qualification unit.
Renewal Period	Number of days that must pass before a person or an equipment needs to be recertified for a qualification unit. The countdown for the renewal period begins when the person or an equipment achieves a *satisfactory completion* of the qualification unit. When the renewal period is completed, a satisfactory completion also expires.
Renewal Period Type	Block of time to specify the renewal period.
Review Period	Block of time to perform the effectiveness review for the qualification unit after they complete the qualification unit. Note: You receive a notification email when the effectiveness review is due. For example, if you have specified **10** as the **Review Period**, the notification email is sent ten days before the effectiveness review is due.
Expected Cost	Cost of implementing the qualification unit.
Currency	Currency used to define the expected cost of the qualification unit.
Expected Duration	Expected number of days estimated to complete the qualification unit.

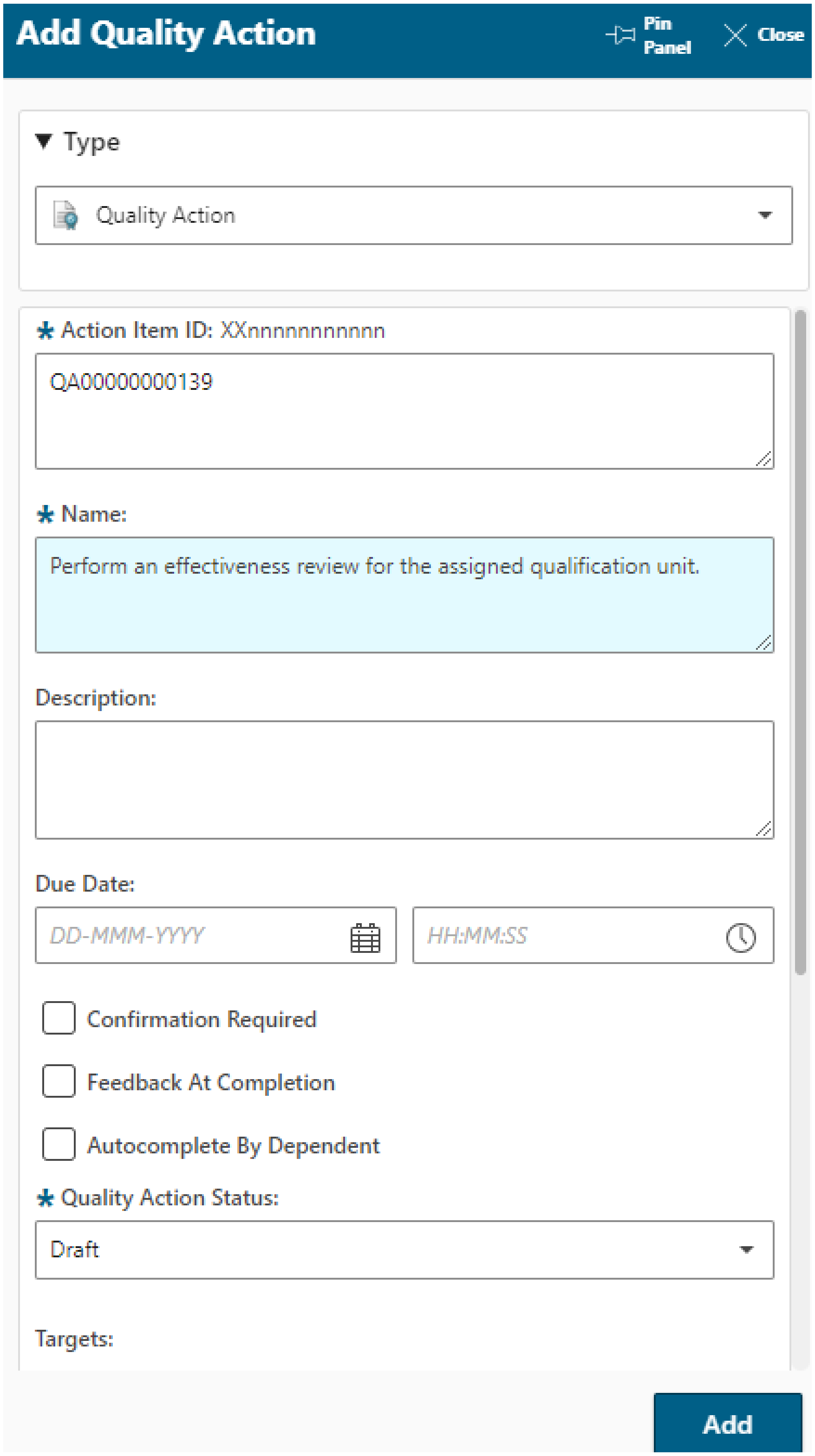
Field	Description
Duration Unit	Block of time used to specify the expected duration.
QR Workflow Template Name	Name of the workflow template that is automatically submitted for the qualification record.
Industry Standard	ISO standard on which the qualification is assessed. This is editable only when the qualification unit is in draft status.

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

4. If you want the assigned employee to review the effectiveness of the qualification unit, create a quality action for the review. In the **Confirmation of Effectiveness** section, 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.



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.

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

   B. 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.

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

   B. 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, click the **Filters** tab to specify the filter criteria.

  b. Select the required filter criteria and click the **Results** tab to view the filtered quality actions.

  c. Select the quality action template and click **Select**.

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

     The quality action is assigned the same name as the quality action template.

- 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**.

> Note:
>
> You must add a quality action for the qualification unit if you have selected **Effectiveness Review Required** for the qualification unit. When you submit the qualification unit to the **QU Approval & Release Single Workflow** workflow, the **Check Effectiveness Flag and Attached Quality Actions** task is created for you. When you click **Complete** in the task, an error occurs if you have not created a quality action for the qualification unit.
>
> When the qualification unit is assigned to a qualification profile, a quality action is created for the target entity assigned to the qualification profile. The target entity receives a notification email when the quality action is due.

5. To assign an Effectiveness Review checklist to the qualification unit, do the following:

   a. In the **Effectiveness Review Checklist** section of the qualification unit, click **Add Quality Checklist** ⊕.

   b. In the **Add** panel, select the required checklist, and click **Add**.

Release a qualification unit to make it available

After you create and complete all necessary edits to a *qualification unit*, you must release it to make it available for assignment to a *qualification profile*.

To do this, you must first assign the type of workflow to be used for the *qualification records* associated with the qualification unit.

- **QR Status Workflow Equipment**: Select this workflow for qualification units created for equipment.
- **QR Status Workflow User**: Select this workflow for qualification units created for employees.

After you assign the type of workflow, submit the qualification unit to the **QU Approval & Release Single Workflow** workflow for approval and release. This workflow creates the tasks to be completed for review, and assigns them to appropriate owners.

To release a qualification unit, do the following:

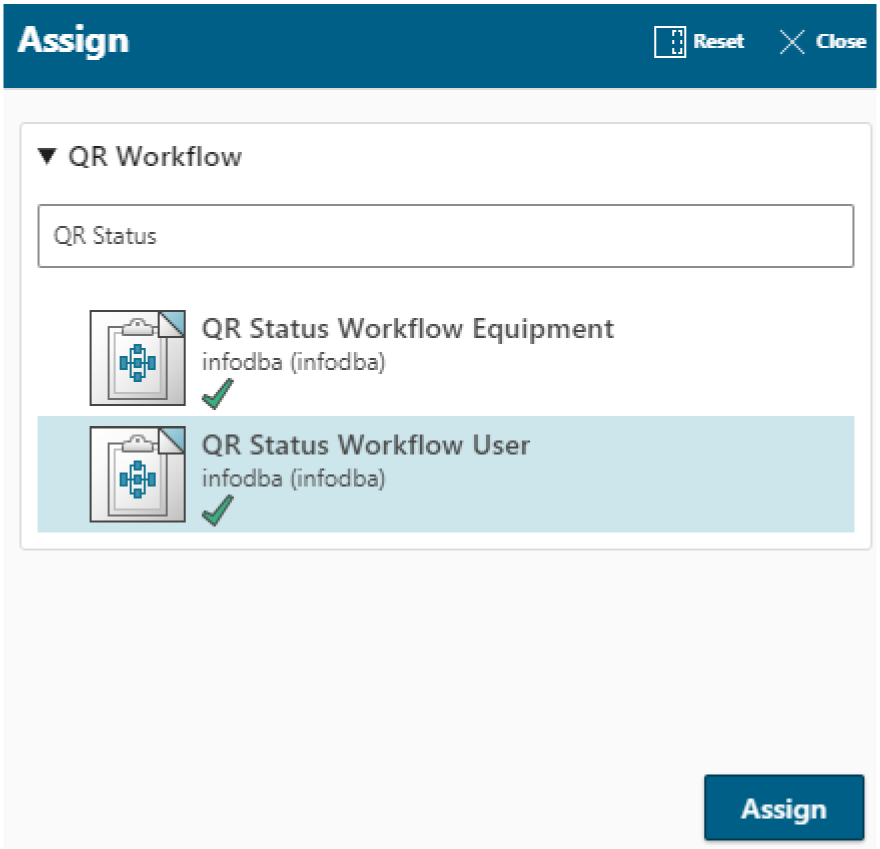
1. On the **HOME** page, click the **EXPLORER** tile, navigate to the folder where you have created the qualification unit, and select it.

2. To specify the type of workflow that is applicable to the qualification record, select it and do the following:

a. Choose **More Commands** ••• > **Manage** > **Assign QR Workflow**.

b. From the **QR Workflow** list in the **Assign** panel, select one of the following workflows.

- **QR Status Workflow Equipment**: Select this workflow for qualification units created for equipment.
- **QR Status Workflow User**: Select this workflow for qualification units created for employees.



c. Click **Assign**.

> Note:
>
> You cannot submit the qualification unit to the **QU Approval & Release Single Workflow** workflow if the **QR Workflow** is not specified for the qualification unit.

3. Submit the qualification unit to the **QU Approval & Release Single Workflow** workflow as follows:

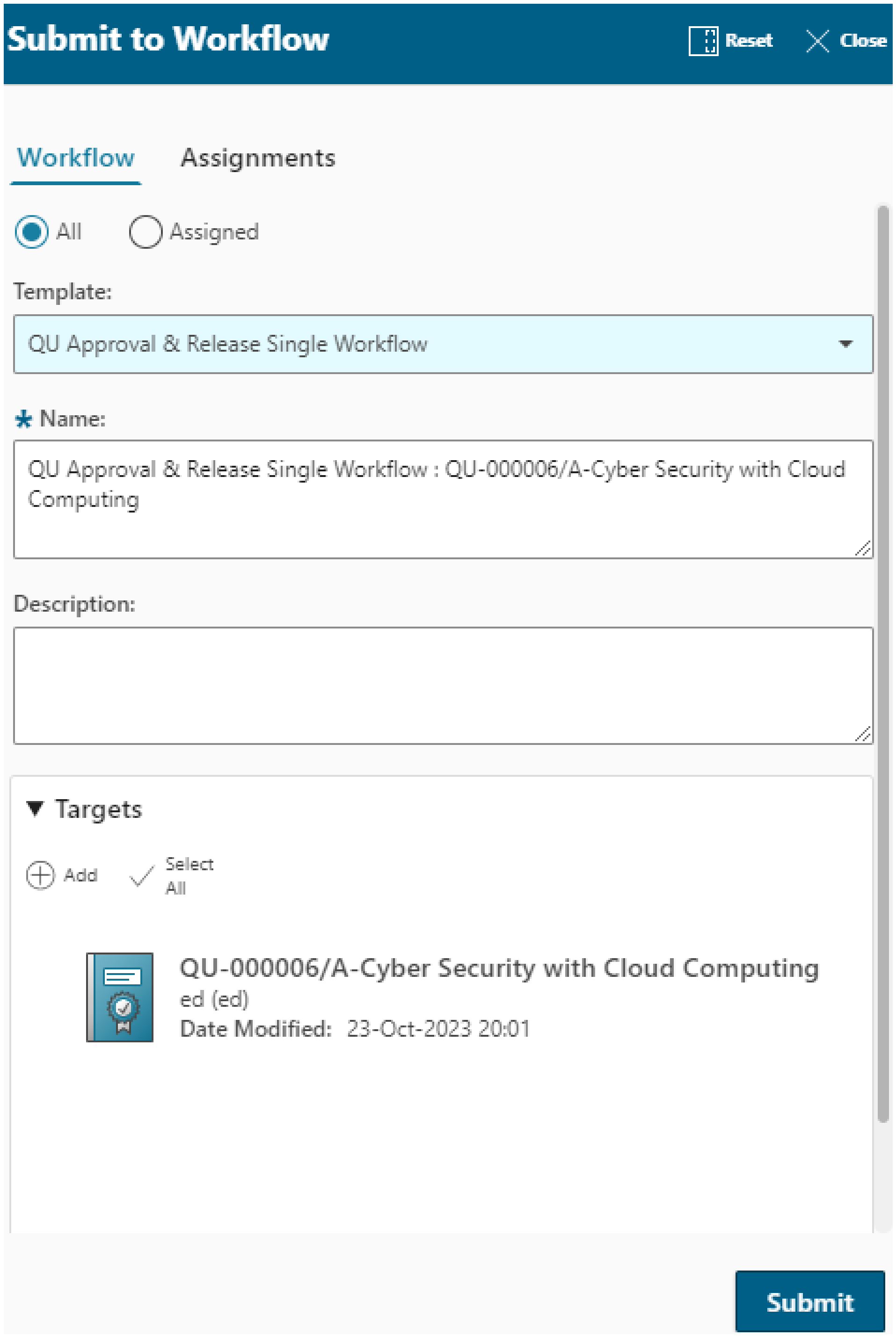
a. Choose **More Commands** ••• > **Manage** > **Submit to Workflow**.

b. In the **Submit to Workflow** panel:

A. From the **Template** list, select **QU Approval & Release Single Workflow**.

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

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



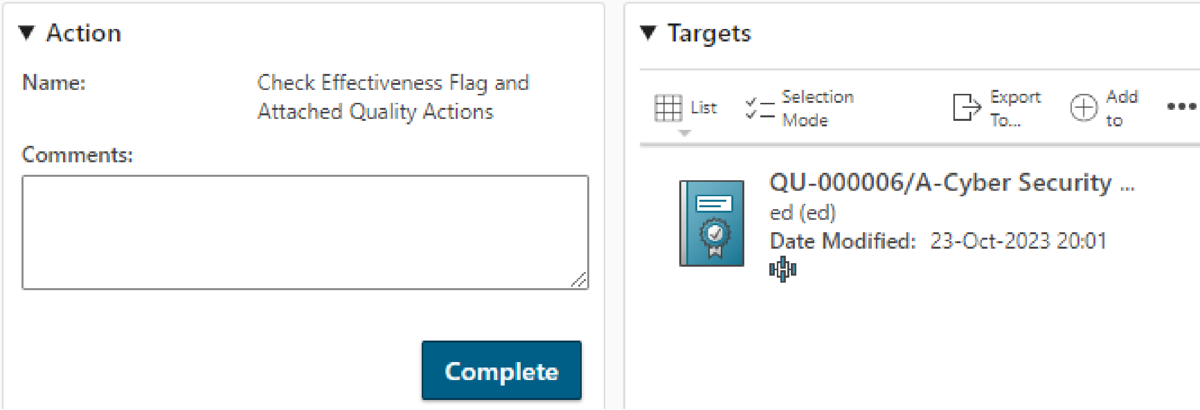
D. Click **Submit**.

The workflow creates a **Check Effectiveness Flag and Attached Quality Actions** task for you.

If you have selected **Effectiveness Review Required** for the qualification unit, you must add at least one quality action for the qualification unit. The quality action is for the assigned employees to perform an effectiveness review for the qualification unit after they complete it.

4. Complete the **Check Effectiveness Flag and Attached Quality Actions** task as follows:

   a. In the **INBOX** tile, select the **Check Effectiveness Flag and Attached Quality Actions** task for the qualification unit.



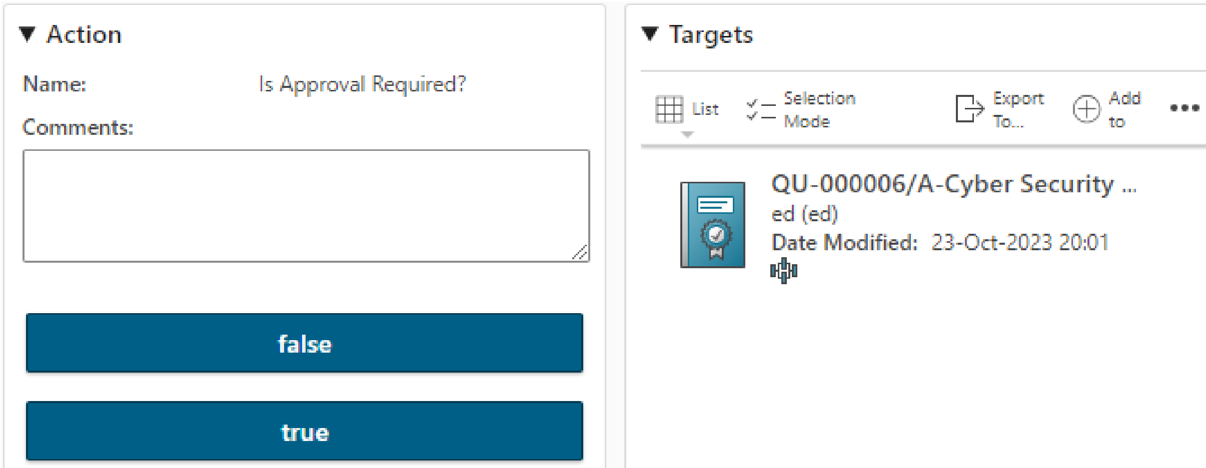
   b. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

   c. Click **Complete**.

   The workflow creates an **Is Approval Required?** task for you.

5. Complete the **Is Approval Required?** task as follows:

   a. In the **INBOX** tile, select the **Is Approval Required?** task for the qualification unit.



b. In the **Overview** tab, under **Targets**, view the qualification unit for review.

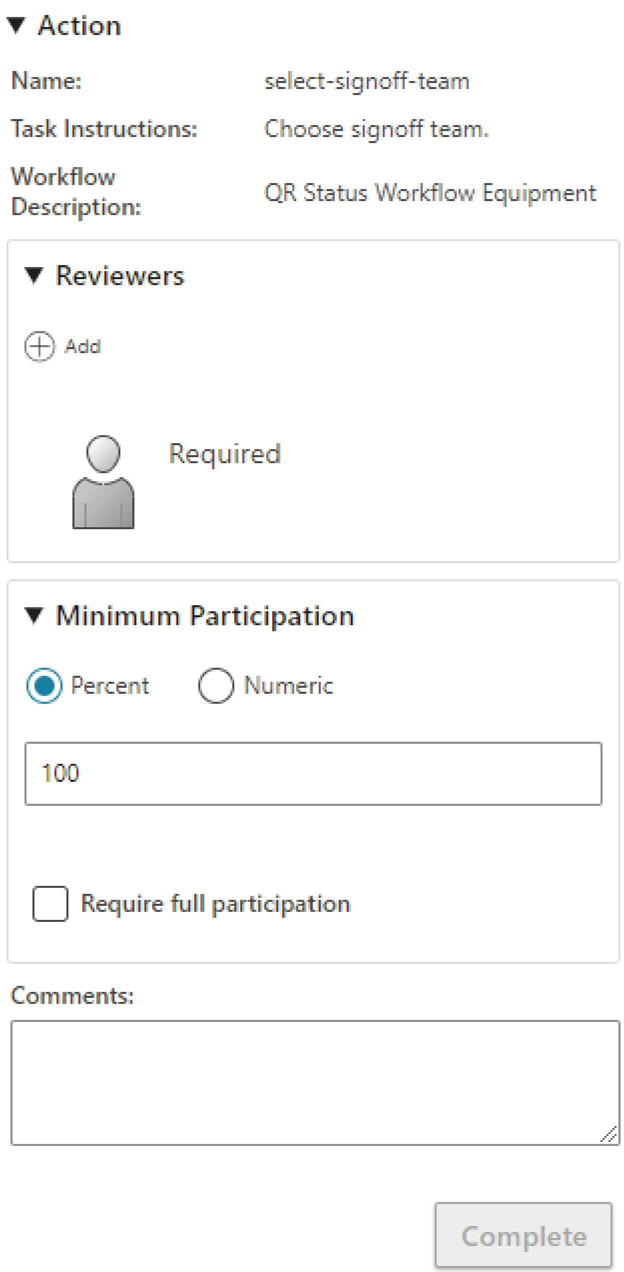
c. Enter your comments in the **Comments** box.

d. Click **True** to send the qualification unit for approval.

   The workflow creates a **select-signoff-team** task for you.

6. Complete the **select-signoff-team** task as follows:

   a. In the **INBOX** tile, select the **select-signoff-team** task for the qualification unit.



b. In the **Reviewers** section, assign reviewers as follows:

   A. Click **Add** ⊕.

   B. In the **Add** panel, search for and select the reviewers, and click **Add**.

c. Specify the reviewer's level of participation in the **Minimum Participation** section.

d. Enter your comments in the **Comments** box, and click **Complete**.

   The workflow creates a **perform-signoffs** task for the selected reviewers.

7. After the reviewers provide their approval, the workflow creates a **Delayed Release Hold** task for you. Complete this task as follows:

   a. Go to your **Inbox** and click the **Delayed Release Hold** notification.

   b. Enter your comments in the **Comments** box, and click **Complete**.

      The qualification unit is released, and its **Release Status** is updated to **TCM Released**.

      The qualification unit is released and available for assignment to a qualification profiles and qualification definitions. Its **Release Status** is updated to **TCM Released**. After you assign a qualification unit to multiple qualification profiles and qualification definitions, you can view the list of assigned qualification profiles and qualification definitions in the **Where Used** tab of the qualification unit.

Delay the release of a qualification unit

You can choose to delay the release of a *qualification unit* by a specific number of days, after a selected date, or when it is approved. After you specify the type of delay, submit it to the **QU Approval & Release Single Workflow** workflow. Then, complete the tasks assigned by the workflow to release the qualification unit.

> Note:
>
> If a new version of the qualification unit is available, delay the release by a specific date or a specific number of days to allow time for the assigned *qualification profiles* to qualify with the latest version of the qualification unit.

Procedure

1. On the **HOME** page, click the **EXPLORER** tile.

2. Select the required qualification unit, and choose **More Commands** ••• > **Edit** > **Start Edit**.

3. In the **Release Settings** section, specify when to release the qualification unit.

Field	Description
When Approved	Allow immediate release of the qualification unit when approved.
Delay by Days	Allow automatic release of the qualification unit after the selected number of days.
Delay by Date	Allow automatic release of the qualification unit after the selected date. If you try to release it earlier than the selected date, an error occurs.

Field	Description
Allow Early Release	Allow early release of the qualification unit before the specified date or days. This option is available only if the **Delay by Days** or the **Delay by Date** option is selected in the **Release Schedule**.
Update Completed Trainee Records	Allow replacement of the older version of the qualification unit with the new version in the assignee's qualification profile.

> Example:
>
> Consider a scenario where the employees have passed a certification and a new version of the certification is available. Before you release the new version, you might need to provide additional time to employees to complete the updated certification. To provide this extra time, you can delay the release of a qualification unit by a specific number of days or after a specific date.

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

5. **Submit the qualification unit to the QU Approval & Release Single Workflow workflow.**

Create a new version of a qualification unit

Based on feedback from the employees taking the training or from new business requirements, you might need to create a new version of a *qualification unit*. When you create and release a new version of the qualification unit, the updated version is populated in the qualification records created for associated qualification profiles and qualification definitions.

> Note:
>
> You can create a new version only after you **release the existing qualification unit**.

1. Open the required qualification unit.

2. Choose **More Commands** ••• > **New** > **Create Version**.

   A new version of the qualification unit is created, and it opens in the edit mode.

3. Make the required updates for the new version and click **Edit** > **Save Edits**.

   If you want the assigned *qualification profiles* to be retrained or recertified on the new version of the qualification unit, you must **release the qualification unit**.

Delete a qualification unit

You can delete a *qualification unit* if it meets the following criteria:

- The qualification unit is not in the **Released** state.
- The qualification unit is not assigned to a *qualification profile*.

To delete a qualification unit, do the following:

1. Open the required qualification unit.
2. Choose **More Commands** ••• > **Edit** > **Delete**.
3. In the confirmation message, click **Delete**.

5. Managing course offerings

Create a course offering

As a training coordinator, you can create a course offering to track and manage the attendees' progress for a specific qualification unit. You can enroll multiple attendees, oversee their progress, and record their completion of the offering.

> Example:
>
> A training coordinator is asked with overseeing the training process of forklift operators to ensure that they achieve their OSHA certifications Class I. The training coordinator accordingly creates a course offering for OSHA certification Class I. This course offering is scheduled to be completed between April 1, 2024 to April 28, 2024, within a duration of 30 hours. The coordinator also adds instructors and qualification profiles of the trainee forklift operators to this course offering. The training coordinator monitors their attendance and progress throughout the training to ensure that they meet the certification requirements.
>
> After the forklift operators have completed the certification, the training coordinator records the results.

Prerequisites

Before you create a course offering for a qualification unit, the qualification unit must be released.

Procedure

1. Open the required qualification unit.
2. Choose **More Commands** ••• > **Manage** > **Create Course Offering**.
3. Specify the required properties.
4. Choose **More Commands** ••• > **Edit** > **Save Edits**.

Schedule a course offering

As a training coordinator, you can plan a course offering by selecting the start and end dates, setting the time, and arranging the enrollment period for participants.

Procedure

1. Open the required course offering.

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

3. Specify the required properties in the **Enrollment Schedule** field.

4. In the **Course Schedule** section, click **Add**.

5. Specify the **Course Start Date** and the **Course End Date**.

   You can also specify the start time and end time for the course offering.

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

Add an instructor to a course offering

As a training coordinator, you can add one or more instructors to the course offering.

Procedure

1. Open the required course offering.

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

3. In the **Course Instructors** field, specify the name of the instructor.

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

Add attendees to a course offering

As a training coordinator, you can add attendees to a course offering.

Procedure

1. Open the required course offering.

2. In the **Attendees** section, click **Add**.

3. In the **Attendees** panel, select the required qualification profile.

   You can select the qualification profile from the following tabs:

   - **New Trainee**: Lists the qualification profiles that do not have any qualification records.

   - **Assigned Trainee**: Lists the qualification profiles that have a qualification record and are in a new, incomplete, or scheduled state.

- **Re-Training**: Lists the qualification profiles that have a qualification record and are in a pass, completed, failed, certification passed, certification failed, ineffective, or effective state.

4. Click **Add**.

   The attendees receive notifications when they are added to the course offering.

Record an attendee's result

As a training coordinator, you can record the results of each attendee in the course offering.

Procedure

1. Open the required course offering.

2. Under the **Attendees** section, in the **Attendee Status** column, select the status of the attendee.

Close a course offering

To ensure that the latest status of the course offering is reflected in a qualification record, you must close the course offering,

Prerequisites

The results of all the attendees must be recorded in the course offering.

Procedure

1. Open the required course offering.

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

3. In the **Submit to Workflow** panel, from the **Template** list, select **Course Offering Closure Workflow**.

4. Click **Submit**.

   The course offering is closed, and the qualification records for all the attendees are updated.

6. Managing documentation in a qualification unit

Introduction to managing documentation

Document management is crucial in training programs. It ensures that trainees have access to the latest training materials and uphold regulatory compliance. It also streamlines the training process to save time and resources, and enhances knowledge retention for trainee development.

In Teamcenter, you can add the following two types of documents to a qualification unit:

1. Quality documents: Automatically updates linked qualification units when the document is revised. This provides trainees with the latest information through the updated document.

2. Reference documents: Revisions to these documents do not update linked qualification units. This type of document includes resources, such as case studies, training materials for reference, videos, or images that serve as supplementary material for the qualification unit.

> Example:
>
> Consider a manufacturing company that wants to manage development programs for assembly line workers. The company maintains a set of quality documents, including Assembly Line Safety Protocols (ALSP-102), which are essential for ensuring workplace safety. This document is added to a qualification unit, Safety Training for Assembly Line Workers (STALW-QU10)
>
> Whenever the company revises ALSP-102 in response to new safety regulations, the STALW-QU10 is automatically updated. This ensures that all assembly line workers receive instruction based on the updated document, upholding a high standard of safety and compliance.
>
> Along with the quality document, the training coordinator adds a video tutorial, Efficient Assembly Line Practices, to the qualification unit as a supplementary resource. While this video provides valuable tips for improving productivity, it as important as the released quality document. Therefore, updates to the video do not revise STALW-QU10.
>
> This ensures that the company effectively manages its training content. It integrates critical updates into the training program and also offers workers additional resources to improve their skills.

Add a reference document to a qualification unit

You can add a reference document to a qualification unit to give trainees additional information for an assigned qualification.

> Note:
>
> Your administrator must enable the addition of the reference document for a qualification unit.

Procedure

1. Open the required qualification unit.
2. Click the **Contents** tab.
3. In the **Attachments** section, click **Add**.
4. In the **Add** panel, click the **New** tab.
5. Click **Choose File** to select the files from your system.
6. Click **Add**.

Create a quality document

You can create a quality document to maintain and track the latest updates in the document of a qualification unit.

Procedure

1. On the **HOME** page, click the **EXPLORER** tile.
2. Choose **More Commands** ••• > **New** > **Add**.
3. In the **Add** panel, select **Quality Document**.
4. Specify the required properties.
5. Click **Add**.

Release a quality document

You must release the quality document to make it available for use in qualification unit.

Procedure

1. Open the required quality document.
2. Choose **More Commands** ••• > **Manage** > **Submit to Workflow**.

3. In the **Submit to Workflow** panel, from the **Template** list, select a workflow to release the quality document, for example, the **TCM Release Process** workflow.

4. Click **Submit**.

Add a quality document to a qualification unit

To provide trainees with the latest information for the qualification, you can add a released quality document to a qualification unit.

Procedure

1. Open the required qualification unit.

2. Click the **Contents** tab.

3. In the **Attachments** section, click **Add**.

4. In the **Add** panel, in the **Quality Document** tab, select the required quality document.

   > Note:
   >
   > You can only see released quality document list in the **Quality Document** tab.

5. Click **Add**.

   > Note:
   >
   > After you add the quality document, you must release the qualification unit.

Create a new version of a quality document

You can create a new version of a quality document.

> Note:
>
> You must release the qualification unit to which you have attached the required quality document. This will ensure that the qualification unit is updated to reflect the latest version of the quality document.

Procedure

1. Open the required quality document.

2. Choose **More Commands** ••• > click **New** > **Revise**.

3. Specify the required properties.

4. Click **Revise**.

Release the new version of quality document

To update the qualification unit with a latest version of the quality document, you must release the new version first.

Procedure

1. Open the new version of the quality document.

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

3. In the **Submit to Workflow** panel, from the **Template** list, select the **Training and Qualification Document Management** workflow.

4. Click **Submit**.

   The quality document is released. The qualification unit associated with this quality document is also updated to a new version. This ensures that the trainees complete the latest version of the training.

7. Managing qualification definitions

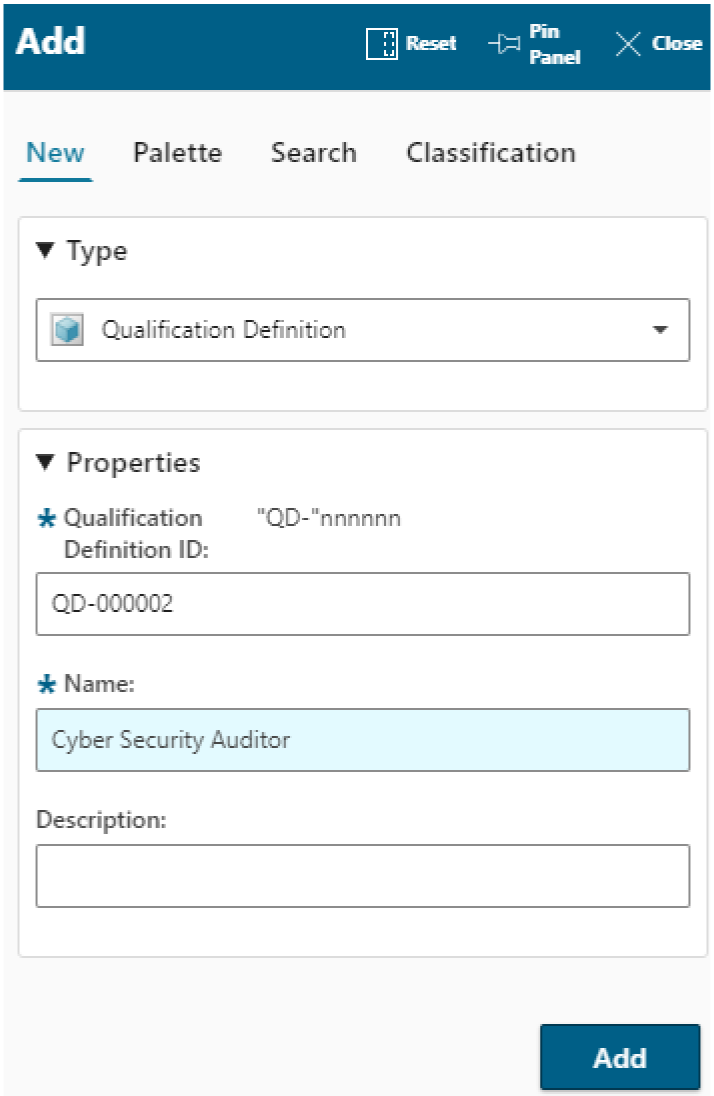
Create a qualification definition

A *qualification definition* is a collection of *qualification units* that define a job position. An assignee must complete all qualification units in the qualification definition to be fully qualified for the job position. A qualification definition simplifies the process of qualifying a *qualification profile* by assigning all required qualification units at one time, instead of assigning individual qualification units.

A qualification definition also ensures audit compliance by assigning the same set of qualification units for each new employee that joins the company. If you assign individual qualification units, you might miss out on assigning some qualification units to a new employee. When an audit is performed, the auditor will find that employees with the same job position have not completed the same set of qualification units.

Procedure

1. On the **HOME** page, click the **EXPLORER** tile, and navigate to the folder where you want to create the qualification definition.
2. Choose **More Commands** ••• > **New** > **Add**.
3. In the **Add** panel, select **Qualification Definition**.
4. In the **Name** box, type a name for the qualification definition.
5. In the **Description** box, describe the qualification definition.



6. Click **Add**.

7. After creating the qualification definition, specify its **Qualification Period** and **Qualification Definition Details** as follows:

   a. Select the qualification definition you have created, and choose **More Commands** ••• > **Edit** > **Start Edit**.

   b. Specify the number of days available to the assignee to complete the qualification unit in **Qualification Period**.

   c. In the **Qualification Definition Details** box, specify the qualification definition details, such as the complete job description, detailed job requirements, and so on.

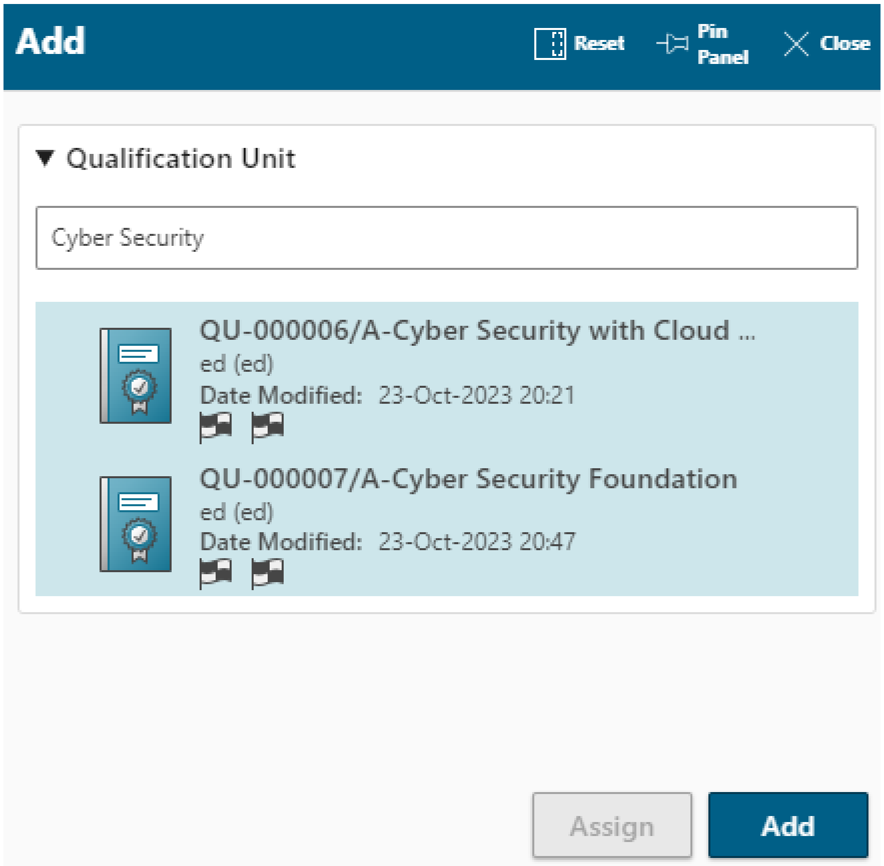
      You can add detailed content such as text, tables, or graphics in the rich text editor.

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

8. Assign qualification units to the qualification definition as follows:

   a. In the **Qualification Units** section of the qualification definition, click **Add** ⊕.

   b. In the **Add** panel, search for and select the qualification units, and click **Add**.



Note:

The qualification units must be in the **Released** or **Approved Unreleased** status to be assigned to the qualification definition.

Release a qualification definition to make it available

After you create and complete all necessary edits to a *qualification definition*, and assign the required *qualification units*, you must release it to make it available. To do this, submit it to the **Qualification Definition Release Workflow** workflow. The workflow creates a task for you to specify the reason for the change and what is the change. After you provide the reason for the change and complete the task, the qualification definition is available for assignment to a *qualification profile*.

Procedure

1. On the **HOME** page, click the **EXPLORER** tile, and navigate to the folder where you have created the qualification definition.

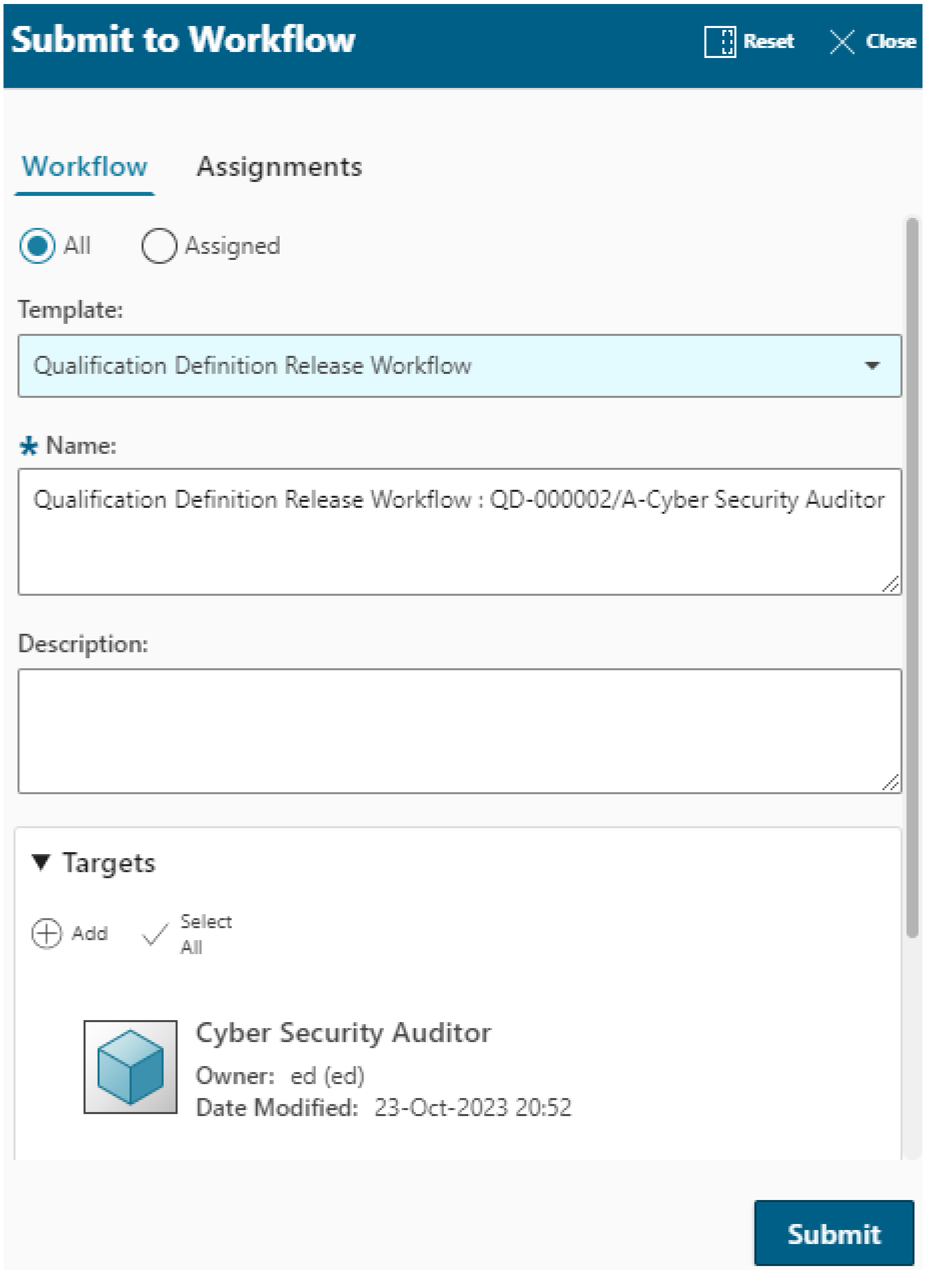
2. Select the qualification definition, and choose **More Commands** ••• > **Manage** > **Submit to Workflow**.

3. In the **Submit to Workflow** panel:

    a. From the **Template** list, select **Qualification Definition Release Workflow**.

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

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



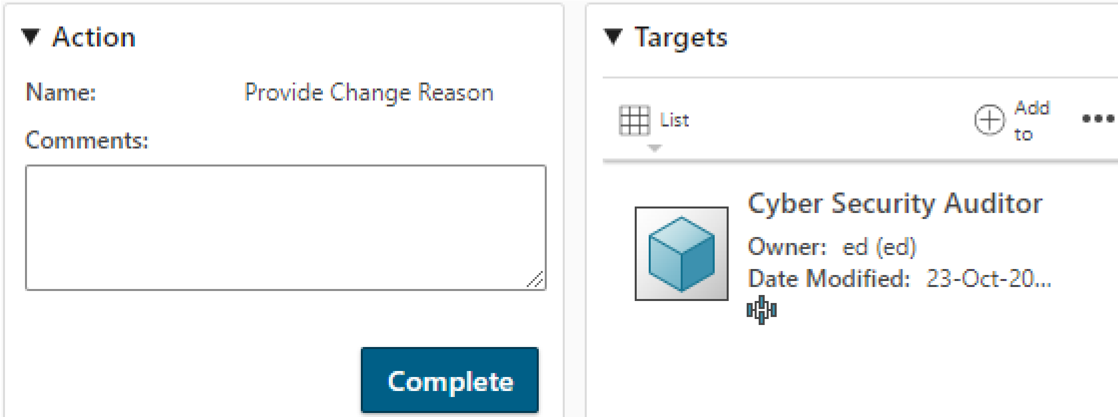
d. Click **Submit**.

The workflow creates a **Provide Change Reason** task for you. In this task, you must specify the reason for the change and what is the change.

e. Complete the **Provide Change Reason** task as follows:

A. In the **INBOX** tile, select the **Provide Change Reason** task for the qualification definition.

B. Under **Action** in the **Overview** tab, specify the reason for the change and what is the change in the **Comments** box.



C. Click **Complete**.

The qualification definition is released and available for assignment to a qualification profile. Its **Release Status** is updated to **TCM Released**. After you assign a qualification definition to multiple qualification profiles, you can view the list of assigned qualification profiles in the **Where Used** tab of the qualification definition.

Create a new version of a qualification definition

Based on feedback from the employees or from new business requirements, you might need to add *qualification units* to a *qualification definition* or remove *qualification units* from a *qualification definition*. In this case, create a new version of the qualification definition, and submit it to the workflow to release it.

Note:

You can create a new version only after you release the existing qualification definition.

Procedure

1. On the **HOME** page, click the **EXPLORER** tile, and navigate to the folder where you have created the qualification definition.

2. Choose **More Commands** ••• > **New** > **Create Version**.

   A new version of the qualification definition is created, and it opens in the edit mode.

3. Make the required updates for the new version, and click **Edit** > **Save Edits**.

   If you want the assigned *qualification profiles* to be retrained or recertified on the new version of the qualification definition, you must release the qualification definition by using the Qualification Definition Release Workflow.

After releasing the new version of the qualification definition, you can add qualification units and release it again using **Qualification Definition Release Workflow**. The new version of the qualification definition is then available in the qualification profile.

8. Managing qualification profiles

Create a qualification profile

A *qualification profile* is used to track all scheduled qualifications to be completed by an assigned person or for equipment. You can specify the supervisor or manager who tracks the status and also specify the qualification period for completing the assigned qualifications.

1. On the **HOME** page, click the **EXPLORER** tile, and navigate to the folder where you want to create the qualification profile.

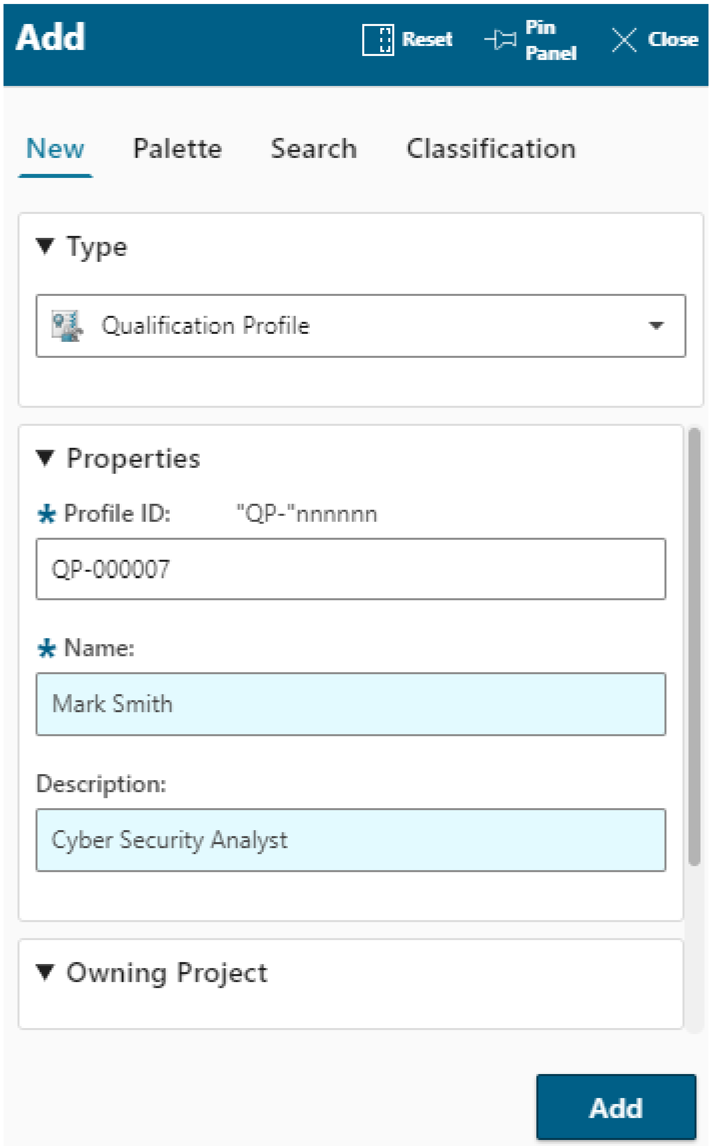
2. Choose **More Commands** ••• > **New** > **Add**.

3. In the **Add** panel, select **Qualification Profile**.

4. In the **Name** box, type the name of the qualification profile.

5. In the **Description** box, describe the qualification profile.

6. Click **Add**.



Assign the target entities and responsible users for a qualification profile

A *target entity* can be a person who must complete the *qualification records* assigned to the *qualification profile*. A target entity can also be equipment that must be certified on the qualification records assigned to the *qualification profile*.

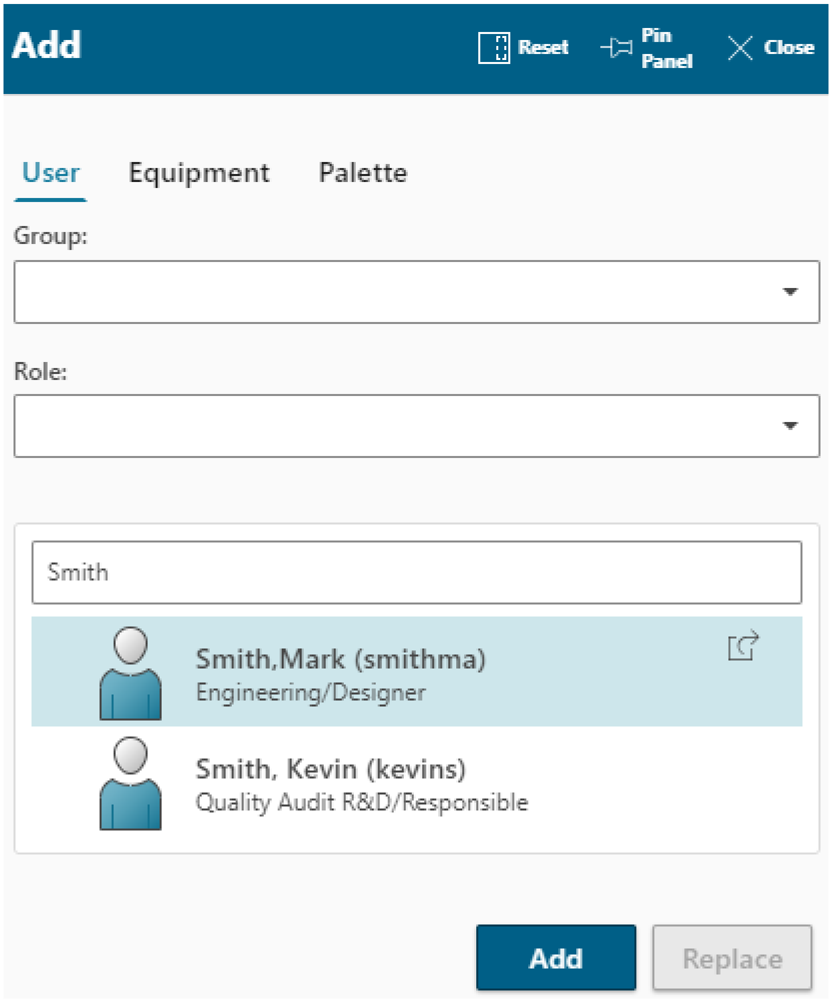
A *responsible user* can be the supervisor or manager of the assigned person. For an assigned equipment, a responsible user can be the calibration manager or the floor manager. You can assign multiple responsible users to the qualification profile. The responsible users track the qualification status of each assigned target entity. They also update the qualification status of the target entity by updating the qualification records.

1. Open the required qualification profile.

2. To assign a target entity to the qualification profile, do the following:

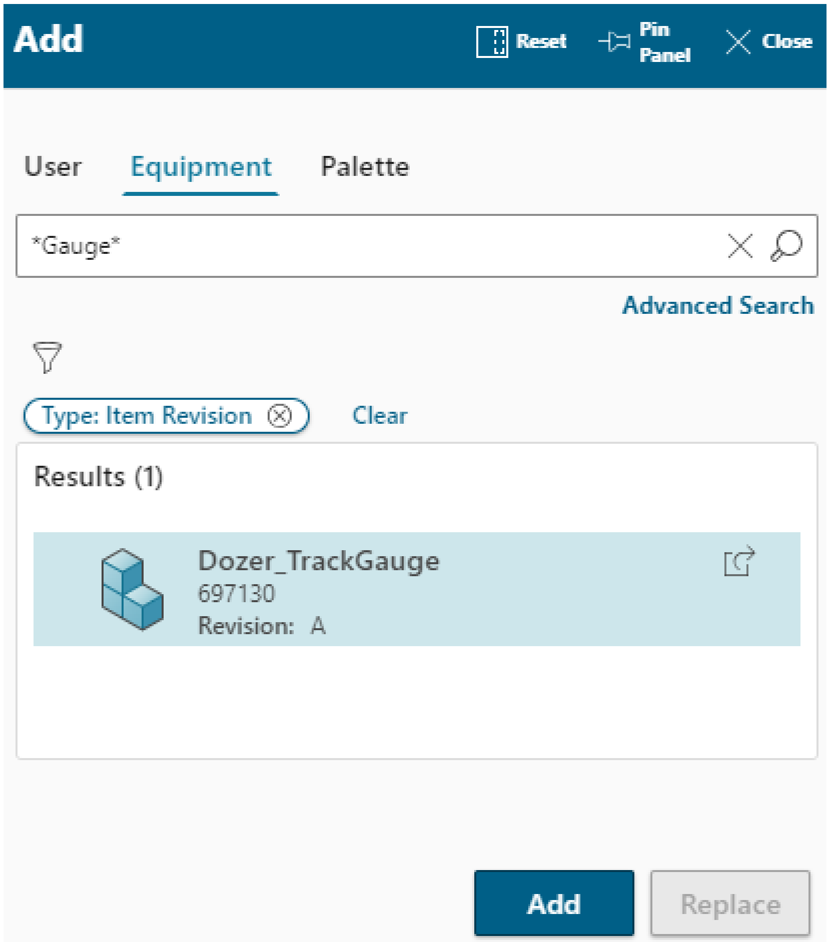
   a. In the **Target Entity** section, click **Add** ⊕.

   b. To assign a person as the target entity for the qualification profile, in the **Add** panel, type a name or title to filter the list of users, select the relevant user, and click **Add**.



   If the selected person is already assigned to an existing qualification profile, an error message appears. In this case, select another person to assign as the target entity.

   c. To assign a unit of equipment as the target entity for the qualification profile, click the **Equipment** tab, search for and select the required equipment, and click **Add**.



If the selected equipment is already assigned to an existing qualification profile, an error message appears. In this case, select another equipment to assign as the target entity.

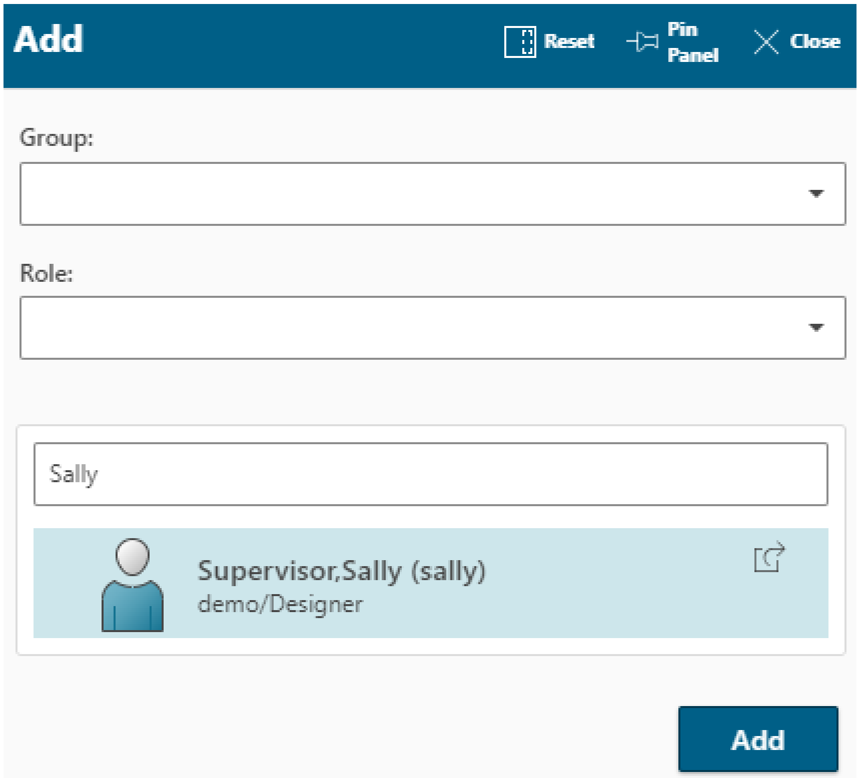
d. To replace the assigned target entity, select it, and click **Replace**.

e. In the **Replace** panel, search for and select the required person or equipment, and click **Replace**.

3. To assign the responsible users for the qualification profile, do the following:

a. In the **Responsible Users** section, click **Add**.

b. In the **Add** panel, type a name or title to filter the list of users, select the relevant users, and click **Add**.



c. To remove an assigned responsible user, select the user, and click **Remove** ⊖.

Add attachments to a qualification profile

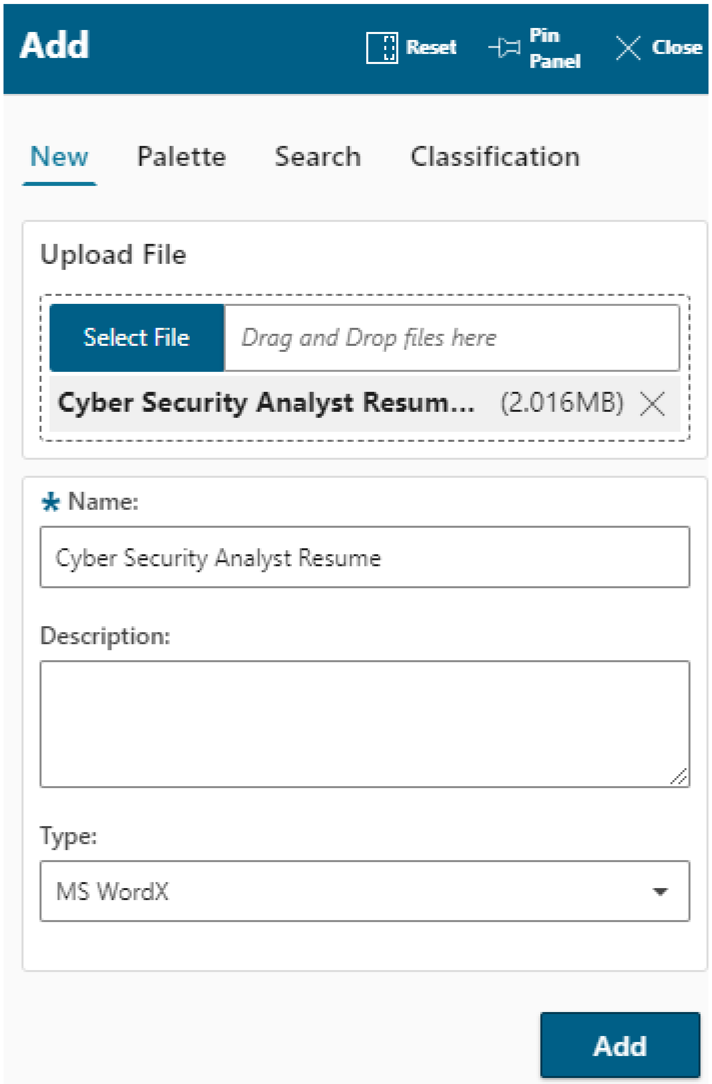
In a *qualification profile*, you can add attachments, such as the resume of the assigned employee or a photo.

1. Open the required qualification profile.

2. In the **Attachments** tab, add the attachments as follows:

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

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



c. To remove the attachment, select it, and click **Remove** ⊖.

Create a qualification profile group

You can use *qualification profile groups* to simultaneously assign multiple *qualification units* to a team.

Qualification profile groups also ensures audit compliance by assigning the same set of qualification units to all members of a team. If you assign individual qualification units, you might miss out on assigning some qualification units to an employee in the team. When an audit is performed, the auditor will find that some team members have not completed the same set of qualification units.

Procedure

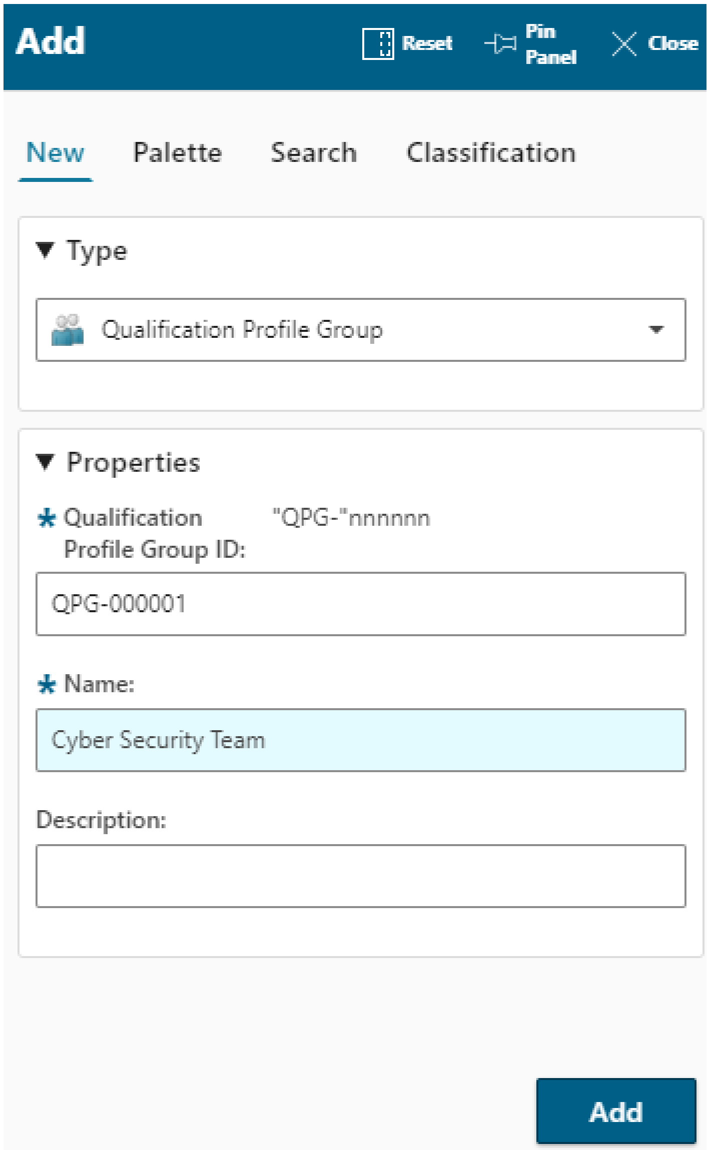
1. On the **HOME** page, click the **EXPLORER** tile, and navigate to the folder where you want to create the qualification profile group.

2. Choose **More Commands** ••• > **New** > **Add**.

3. In the **Add** panel, select **Qualification Profile Group**.

4. In the **Name** box, type a name for the qualification profile group.

5. In the **Description** box, describe the qualification profile group.

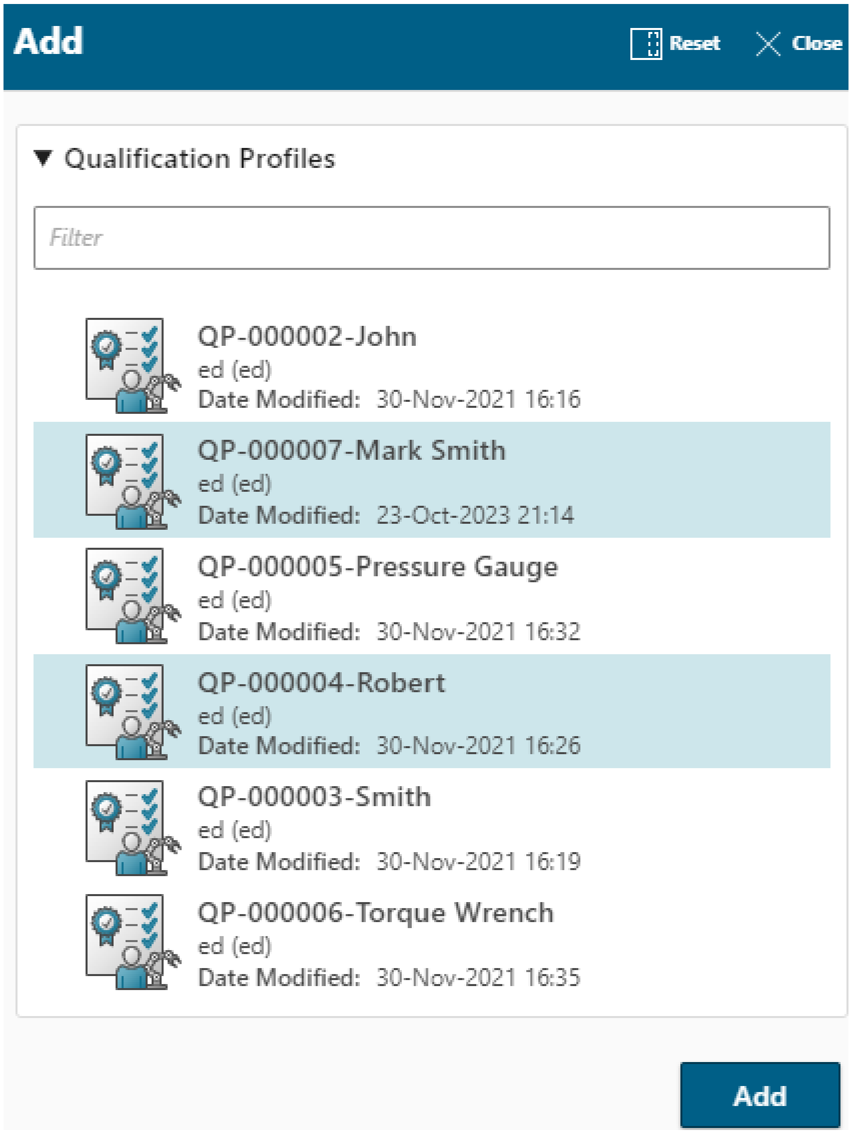


6. Click **Add**.

7. To assign qualification profiles to the qualification profile group, do the following:

   a. In the **Target Entity** section, click **Add** ⊕.

b. Search for and select the required qualification profiles, and click **Add**.

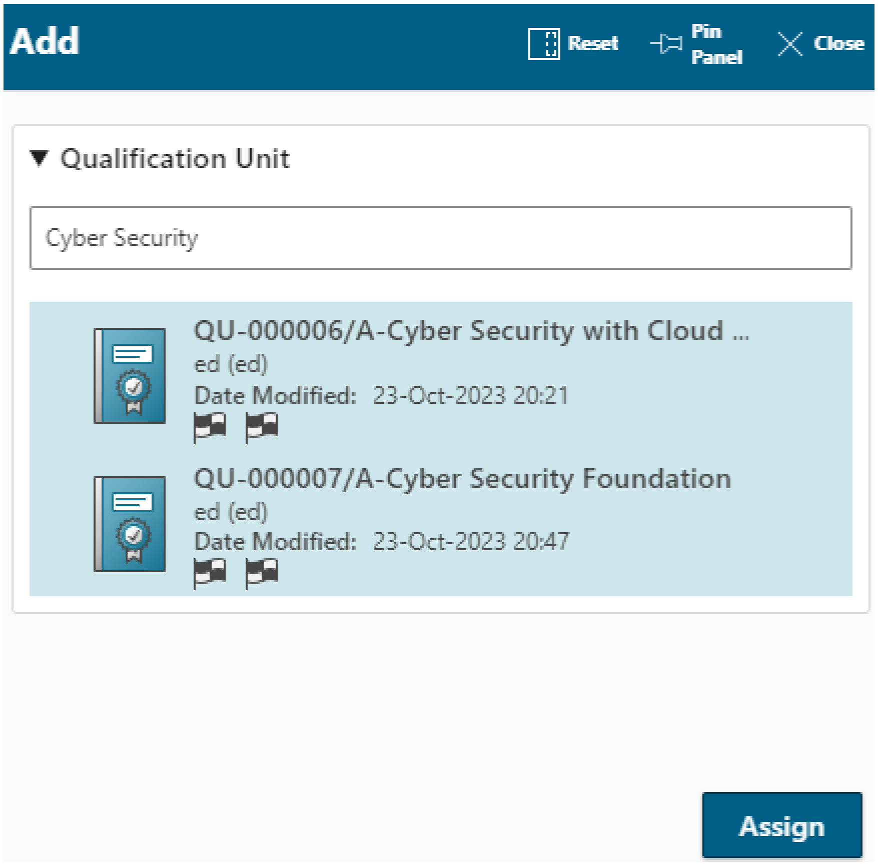


c. To remove an assigned qualification profile, select it, and click **Remove** ⊖.

8. Assign qualification units to the qualification profile group as follows:

   a. Choose **More Commands** ••• > **Manage** > **Assign Qualification Unit**.

   b. In the **Assign** panel, type the name of the qualification unit to filter from the list, select the required qualification units, and click **Assign**.



Note:

The qualification units must be in the **Released** or **Approved Unreleased** status to be assigned to the qualification profile group.

The selected qualification units are assigned to each qualification profile in the qualification profile group. If a qualification unit is already assigned to the qualification profile, an error message is displayed, and the remaining selected qualification units are assigned.

For each qualification profile in the group, the qualification records are created for the assigned qualification units. Additionally, the quality actions and Effectiveness Review checklists, from the qualification unit, are created in the qualification records.

Delete a qualification profile

You can delete a *qualification profile* if it meets the following criteria:

- The qualification profile does not have assigned *qualification units*.
- The qualification profile does not have attachments.

To delete a qualification profile, do the following:

1. Open the required qualification profile.
2. Choose **More Commands** ••• > **Edit** > **Delete**.
3. In the confirmation message, click **Delete**.

9. Assign qualification units to a qualification profile to create qualification records

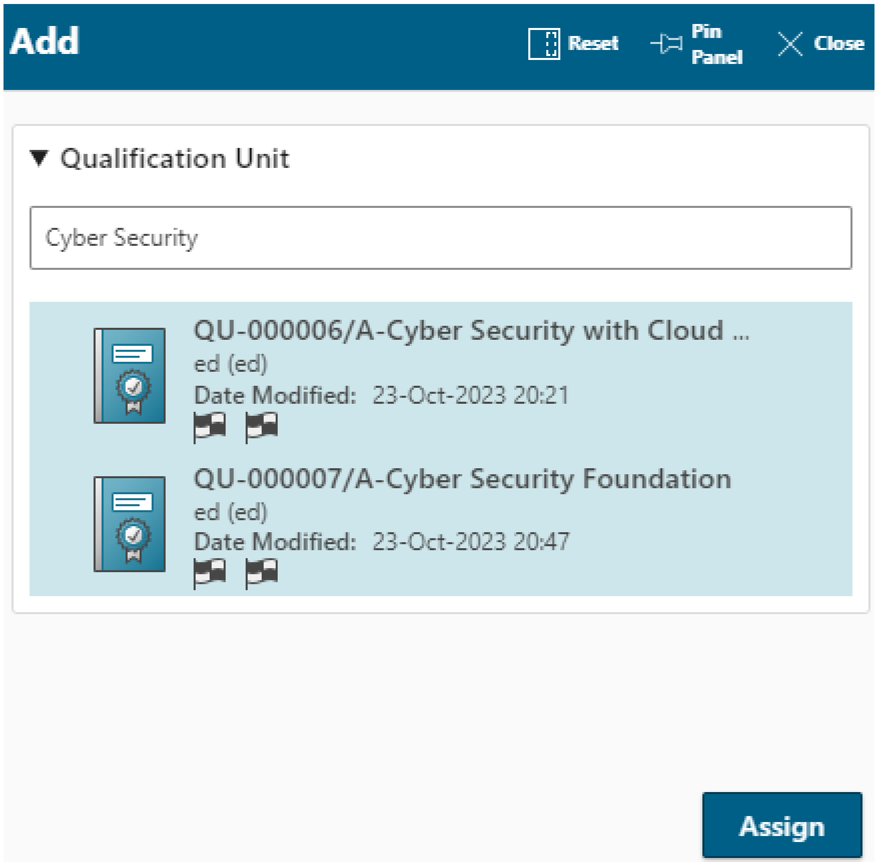
When you assign approved and released *qualification units* to a *qualification profile*, *qualification records* are automatically created. These records provide detailed information about the qualifications or certifications that must be completed by the target entity assigned to the qualification profile. Additionally, the assigned responsible users can track the status of completion by reviewing the status of the qualification records.

1. On the **HOME** page, click the **EXPLORER** tile, navigate to the folder where you have created the qualification profile, and select it.

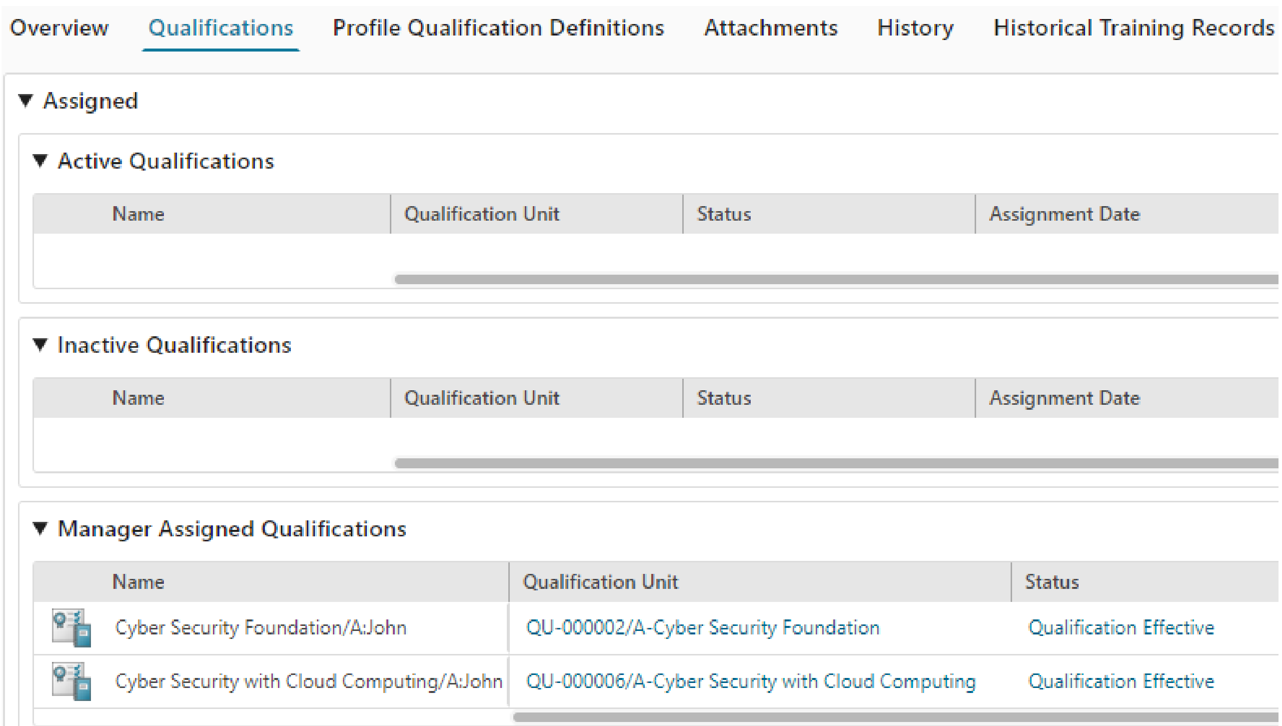
2. Click the **Qualifications** tab.

3. Choose **More Commands** ••• > **Manage** > **Assign Qualification Unit**.

4. In the **Assign** panel, type the name of the qualification unit to filter from the list, select the required qualification units, and click **Assign**.



The qualification records are created for the selected qualification units in the **Manager Assigned Qualifications** section of the **Qualifications** tab. Additionally, the quality actions and Effectiveness Review checklists, from the qualification unit, are created in the qualification records. In the **Historical Training Records** tab, you can view the history of all the trainings completed by the qualification profile. This tab lists the qualification records that are created from assigning qualification units and qualification definitions.



5. To add attachments to a qualification record, open it and click the **Attachments** tab. Do the following:

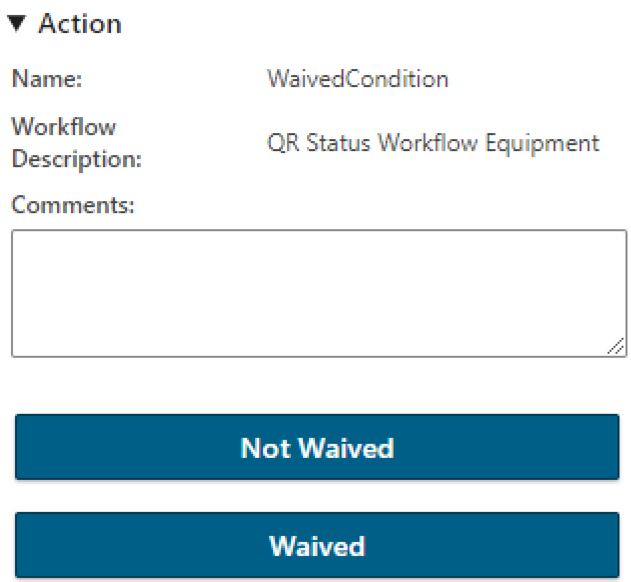
   a. In the **Files** section, click **Add to** ⊕.

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

c. To remove the attachment, select it, and click **Remove** ⊖.

6. To ensure that the assignee completes the qualification record, complete the **WaivedCondition** task as follows:

   a. In the **INBOX** tile, select the **WaivedCondition** task for the qualification unit.



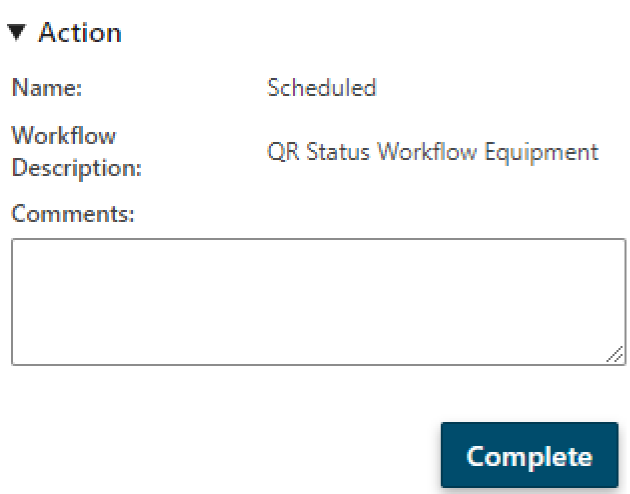
b. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

c. Click **Not Waived**.

   The workflow creates a **Scheduled** task for you.

d. After you schedule the training for the assignee, complete the **Scheduled** task as follows:

   A. In the **INBOX** tile, select the **Scheduled** task for the qualification unit.



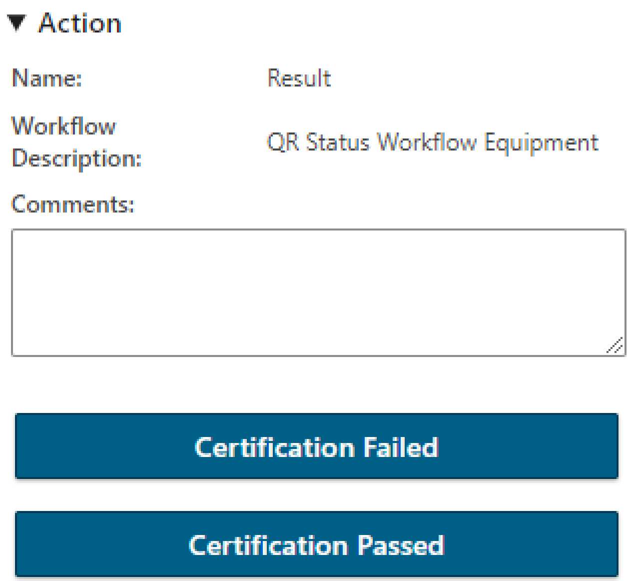
   B. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

   C. Click **Complete**.

The workflow creates a **Result** task for you.

e. To record the result of the training, complete the **Result** task as follows:

   A. In the **INBOX** tile, select the **Result** task for the qualification unit.



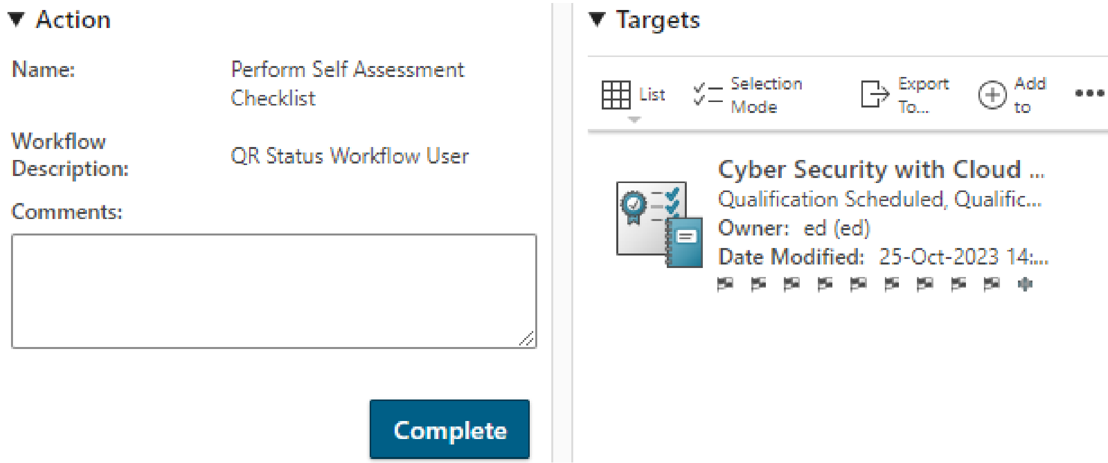
   B. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

   C. Depending on the result, click **Certification Failed** or **Certification Passed**.

   When you click **Certification Passed**, the workflow creates a **Perform Self Assessment Checklist** task for you.

f. To complete the training's checklist, complete the **Perform Self Assessment Checklist** task as follows:

   A. In the **INBOX** tile, select the **Perform Self Assessment Checklist** task for the qualification unit.



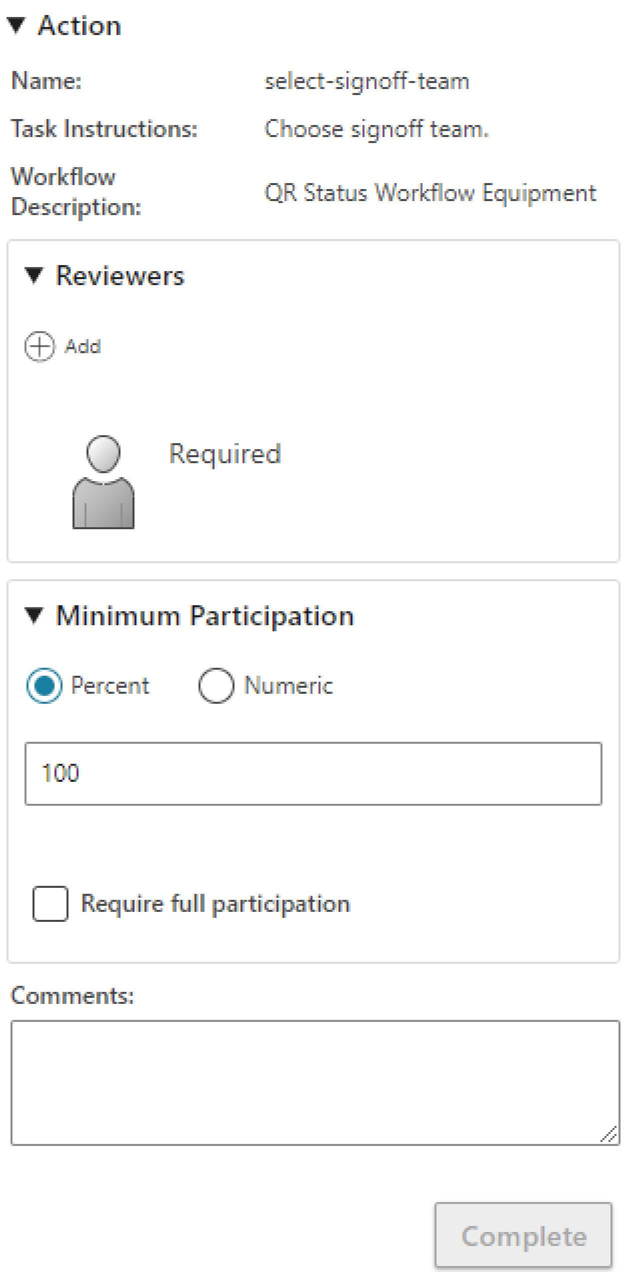
B. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

C. Click **Complete**.

The workflow creates a **select-signoff-team** task for you.

g. Complete the **select-signoff-team** task as follows:

A. In the **INBOX** tile, select the **select-signoff-team** task for the qualification unit.



B. In the **Reviewers** section, click **Add** ⊕ to assign reviewers.

C. In the **Add** panel, search for and select the reviewers, and click **Add**.

D. Specify the reviewer's level of participation in the **Minimum Participation** section.

E. Enter your comments in the **Comments** box, and click **Complete**.

The workflow creates a **perform-signoffs** task for the selected reviewers. After the reviewers provide their approval, the workflow updates the status of the qualification record to **Qualification Passed**.

If the trainee passes the certification, the associated quality action’s **Due Date** is updated by adding the qualification unit’s **Renewal Period** to the current date. If the trainee fails the certification, the associated quality action’s **Due Date** is not updated.

10. Assign qualification definitions to a qualification profile

To qualify an assignee for a specific job position, you can assign a *qualification definition* to the assignee's *qualification profile*. This assigns all *qualification units*, of the qualification definition, to the qualification profile, and creates *qualification records* for each qualification unit.

When you assign a qualification definition, an instance of the qualification definition is created for the profile as a profile qualification definition. As the assignee completes the assigned qualification units, you can track the status of completion by reviewing the status of the profile qualification definition.

Some qualification definitions might have common qualification units. If you assign these qualification definitions to the qualification profile, qualification records are created only for the unique qualification units.

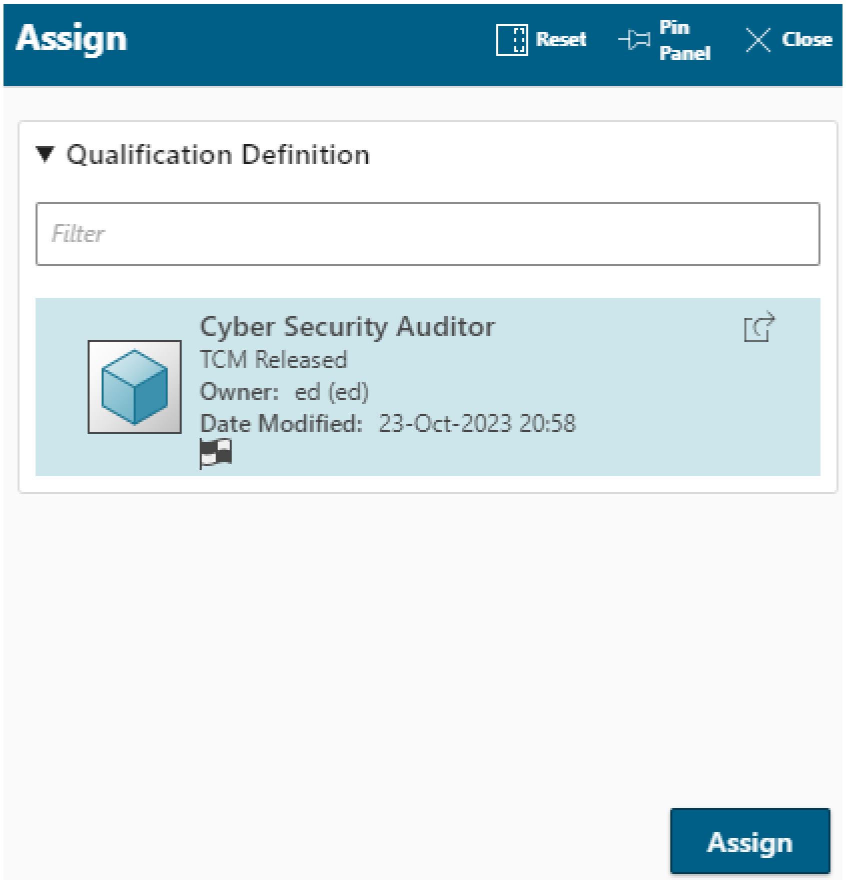
Procedure

1. On the **HOME** page, click the **EXPLORER** tile, navigate to the folder where you have created the qualification profile, and select it.

2. Click the **Profile Qualification Definitions** tab.

3. Choose **More Commands** ••• > **Manage** > **Assign Qualification Definition**.

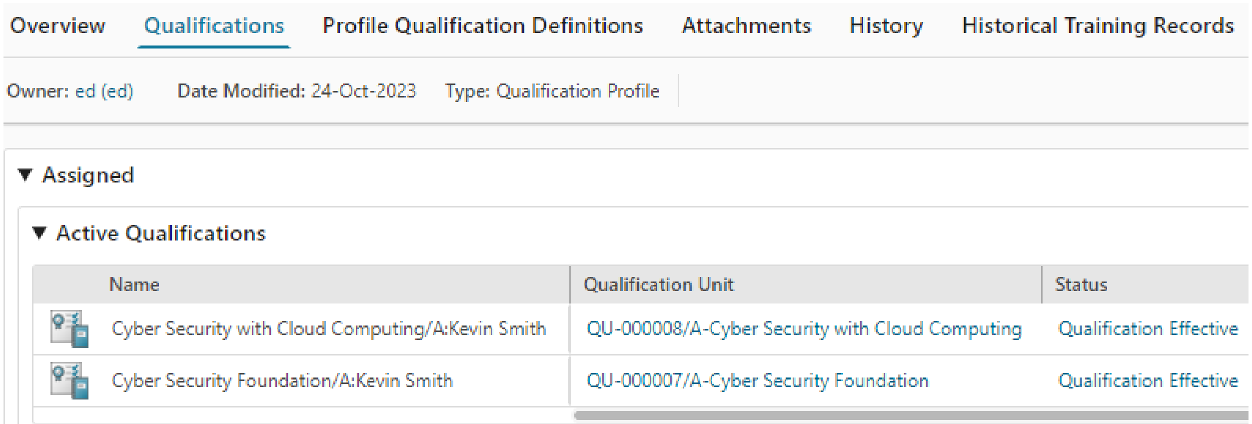
4. In the **Assign** panel, type the name of the qualification definition to filter from the list, select the required qualification definitions, and click **Assign**.



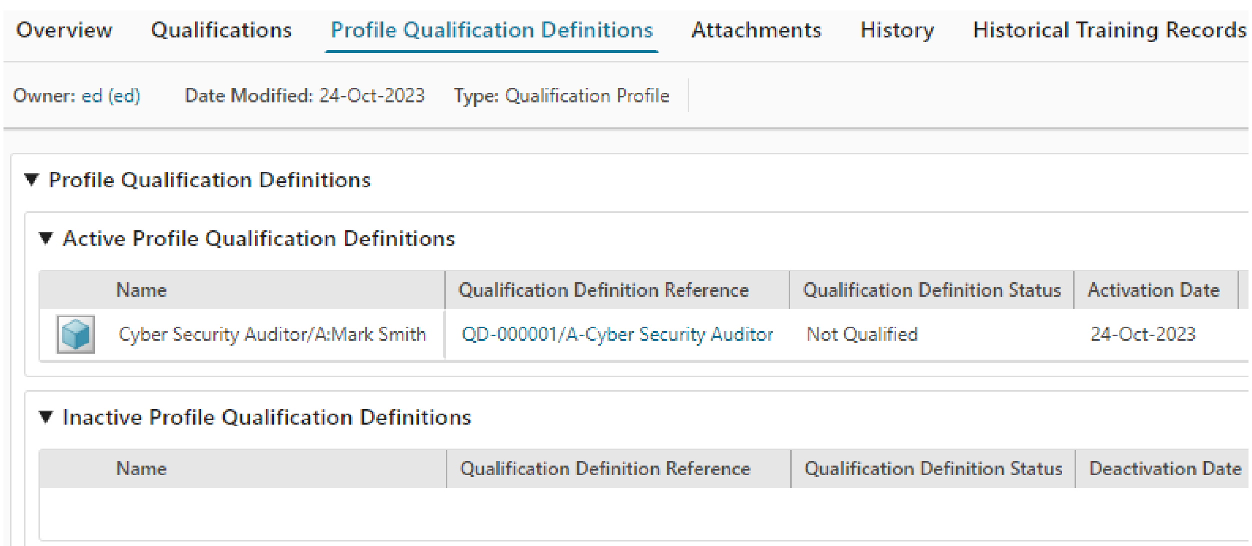
When you assign a qualification definition to a qualification profile, it results in the following:

- In the **Overview** tab, the **Full Qualification Status** field is populated with **Not Fully Qualified**. When the trainee completes all active qualification records created from assigning the qualification definition, the **Full Qualification Status** field is updated to **Fully Qualified**. This field is not impacted by the status of the qualification records from **Manager Assigned Qualifications**.

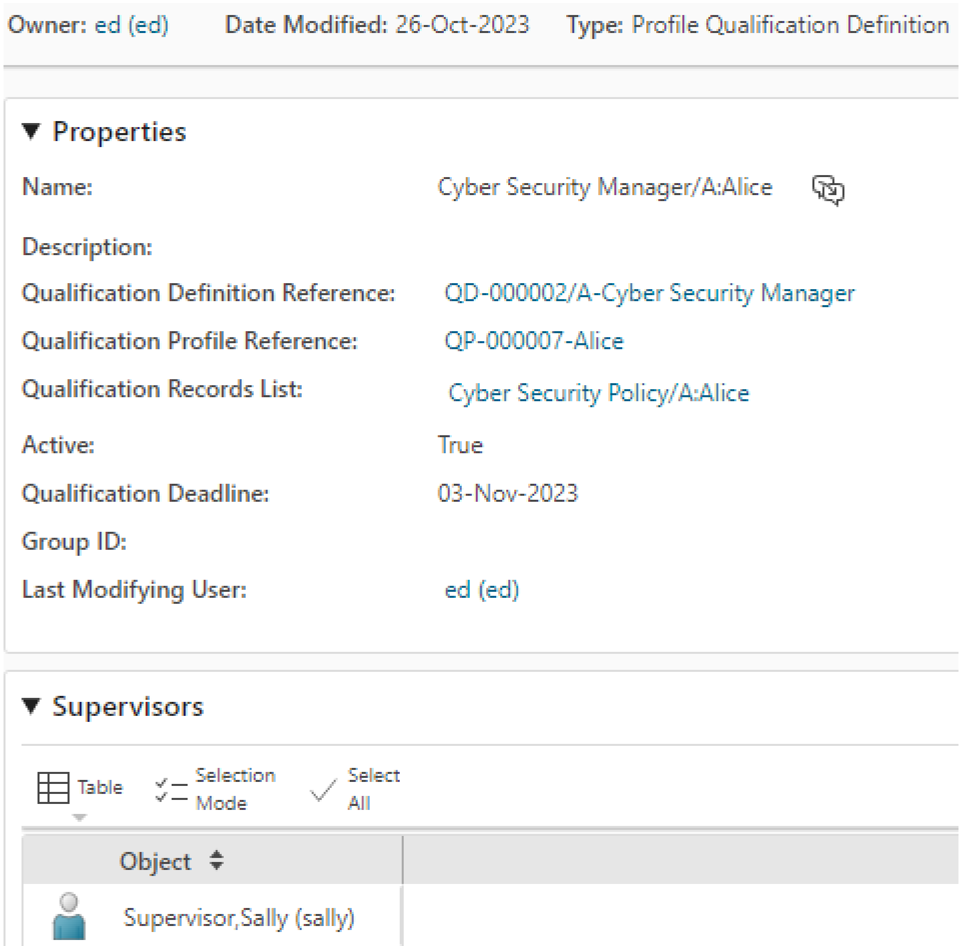
- In the **Active Qualifications** section of the **Qualifications** tab, qualification records are created for the qualification units of the selected qualification definition. Additionally, the quality actions and Effectiveness Review checklists, from the qualification unit, are created in the qualification records.



- In the **Profile Qualification Definitions** tab, an instance of the qualification definition is created for the profile in the **Active Profile Qualification Definitions** section. Here, you can track the status of completion by reviewing the status of the profile qualification definition.



If you open the profile qualification definition, you can view the **Qualification Deadline** date. This date is calculated by adding the qualification definition's **Qualification Period** to the date of assignment. This allows the trainees to know the deadline by when they must complete all trainings of the qualification definition, and become qualified for the job position.



- In the **Profile Qualification Definition Details**, the content is inherited from the parent Qualification Definition into the Profile Qualification Definition.

After the assignment is done, the **QR Workflow** workflow creates a **WaivedCondition** task for each qualification unit of the qualification definition. This task is created when the target entity, of the qualification profile, is a person.

5. (Optional) To assign supervisors to the profile qualification definition, do the following:

   a. In the **Active Profile Qualification Definitions** section, select and open the profile qualification definition.

   b. In the **Supervisors** section, click **Add** ⊕.

   c. In the **Add** panel, search for and select the users to be assigned as the supervisors, and click **Add**.

      Supervisors can edit the profile qualification definition and its qualification records. If you do not assign a supervisor, the **Responsible User** from the qualification profile takes on the role of the supervisor. The assigned supervisor is added to the **Active Supervisors** field in the

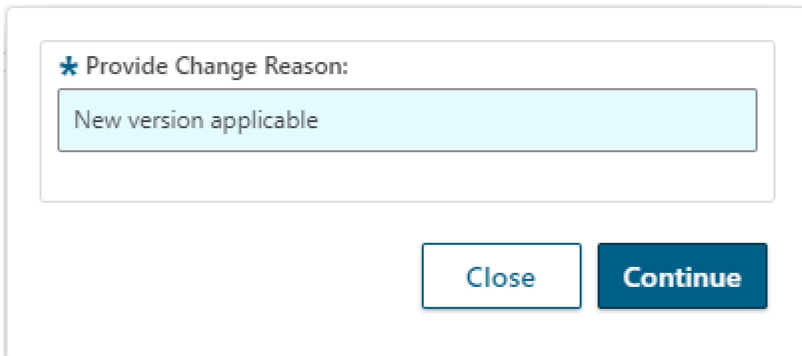
Overview tab of the qualification profile. The **Active Supervisors** field allows the Training Coordinator to view all assigned supervisors from all active profile qualification definitions of the qualification profile.

6. When a trainee is promoted or transferred to another department, or for any other change in status, you must deactivate their profile qualification definition. Do the following:

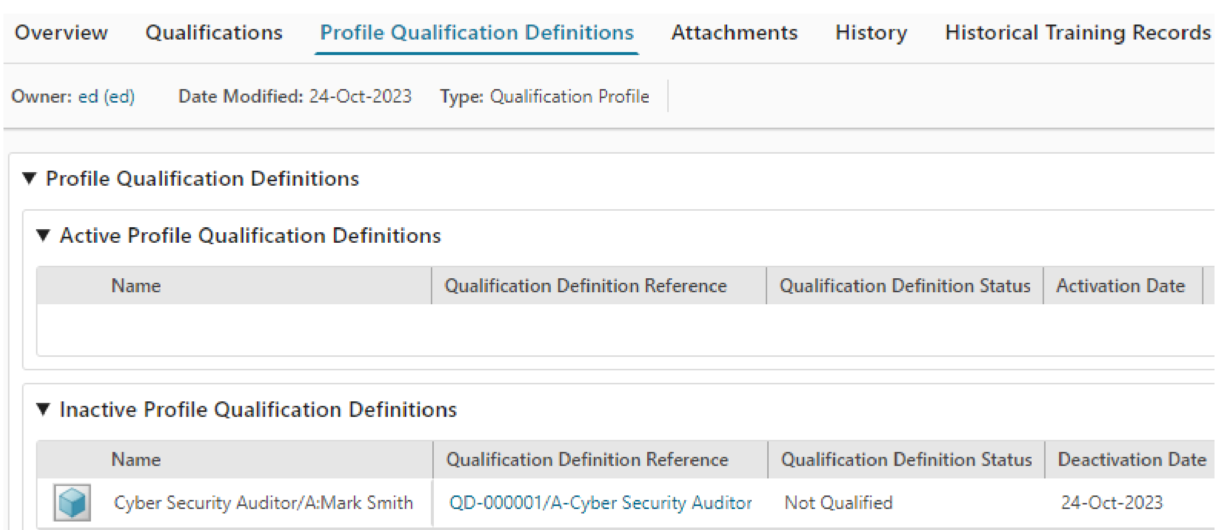
   a. In the **Active Profile Qualification Definitions** section of the **Profile Qualification Definitions** tab, select the required qualification definition.

   b. Choose **More Commands ••• > Manage > Deactivate Profile Qualification Definition**.

   c. In the **Provide Change Reason** dialog, specify the reason for deactivating the **Profile Qualification Definition**, and click **Continue**.



The instance of the qualification definition is moved to the **Inactive Profile Qualification Definitions** section.



In the inactive profile qualification definition, the **Qualification Period** replaces the **Qualification Deadline** date. The **Qualification Period** is inherited from the source qualification definition. The associated qualification units are moved to the **Inactive Qualifications** section of the **Qualifications** tab. If some of the associated qualification units are shared with other active profile qualification definitions, these qualification units remain in the **Active Qualifications** section of the **Qualifications** tab.

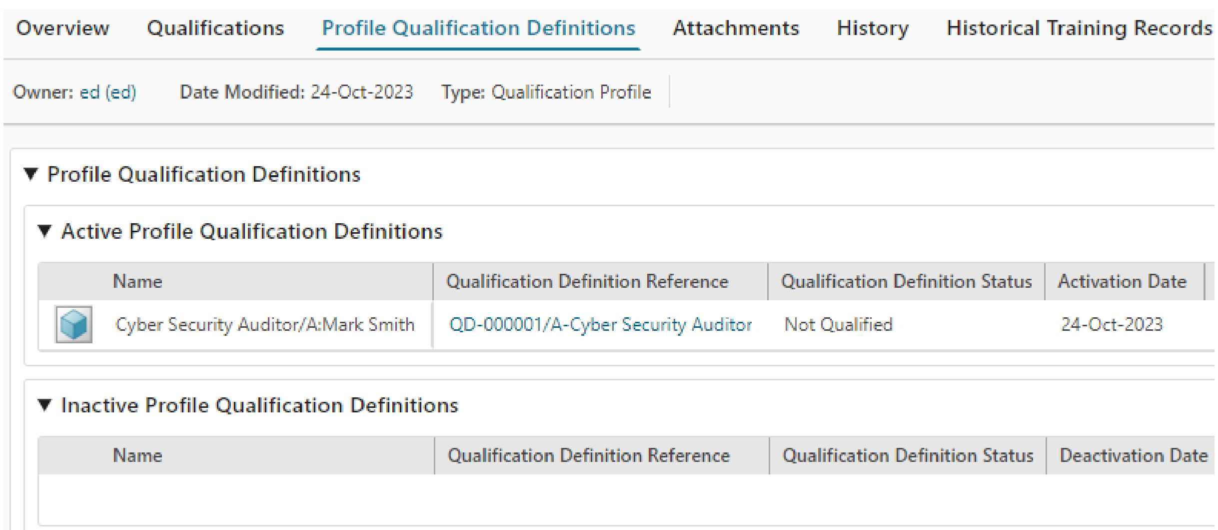
7. To reactivate an inactive profile qualification definition, do the following:

   a. In the **Inactive Profile Qualification Definitions** section of the **Profile Qualification Definitions** tab, select the required qualification definition.

   b. Choose **More Commands** ••• > **Manage** > **Reactivate Profile Qualification Definition**.

   c. In the **Provide Change Reason** dialog, specify the reason for reactivating the **Profile Qualification Definition**, and click **Continue**.

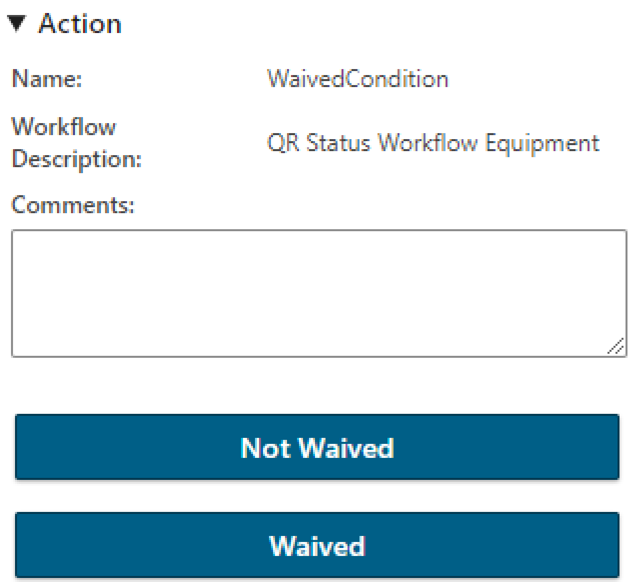
   The instance of the qualification definition is moved to the **Active Profile Qualification Definitions** section.



   In the reactivated profile qualification definition, the **Qualification Deadline** date replaces the **Qualification Period**. This date is calculated by adding the qualification definition's **Qualification Period** to the date of reactivation. The associated qualification units are moved to the **Active Qualifications** section in the **Qualifications** tab.

8. To ensure that the assignee completes the qualification unit, complete the **WaivedCondition** task as follows:

   a. In the **INBOX** tile, select the **WaivedCondition** task for the qualification unit.



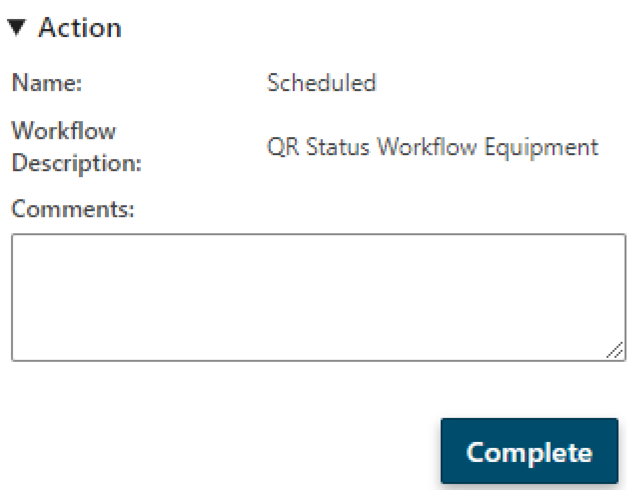
b. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

c. Click **Not Waived**.

The workflow creates a **Scheduled** task for you.

d. After you schedule the training for the assignee, complete the **Scheduled** task as follows:

A. In the **INBOX** tile, select the **Scheduled** task for the qualification unit.



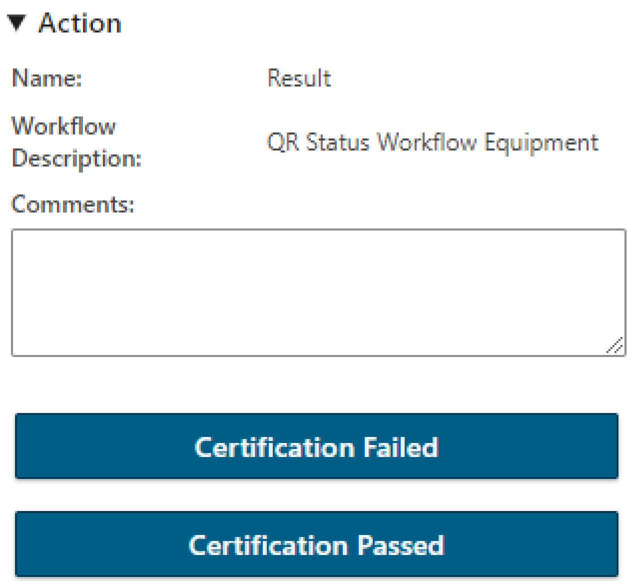
B. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

C. Click **Complete**.

The workflow creates a **Result** task for you.

e. To record the result of the training, complete the **Result** task as follows:

   A. In the **INBOX** tile, select the **Result** task for the qualification unit.



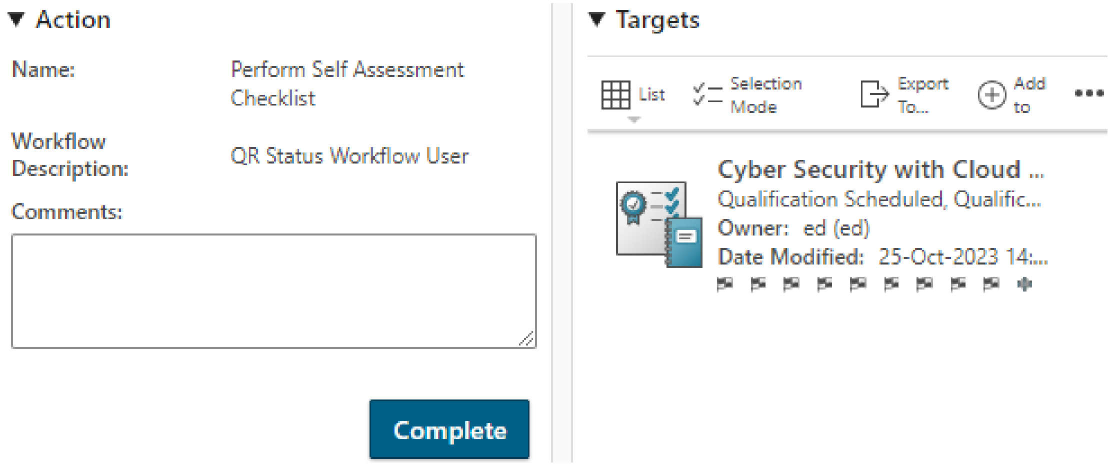
   B. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

   C. Depending on the result, click **Certification Failed** or **Certification Passed**.

      When you click **Certification Passed**, the workflow creates a **Perform Self Assessment Checklist** task for you.

f. To complete the training's checklist, complete the **Perform Self Assessment Checklist** task as follows:

   A. In the **INBOX** tile, select the **Perform Self Assessment Checklist** task for the qualification unit.



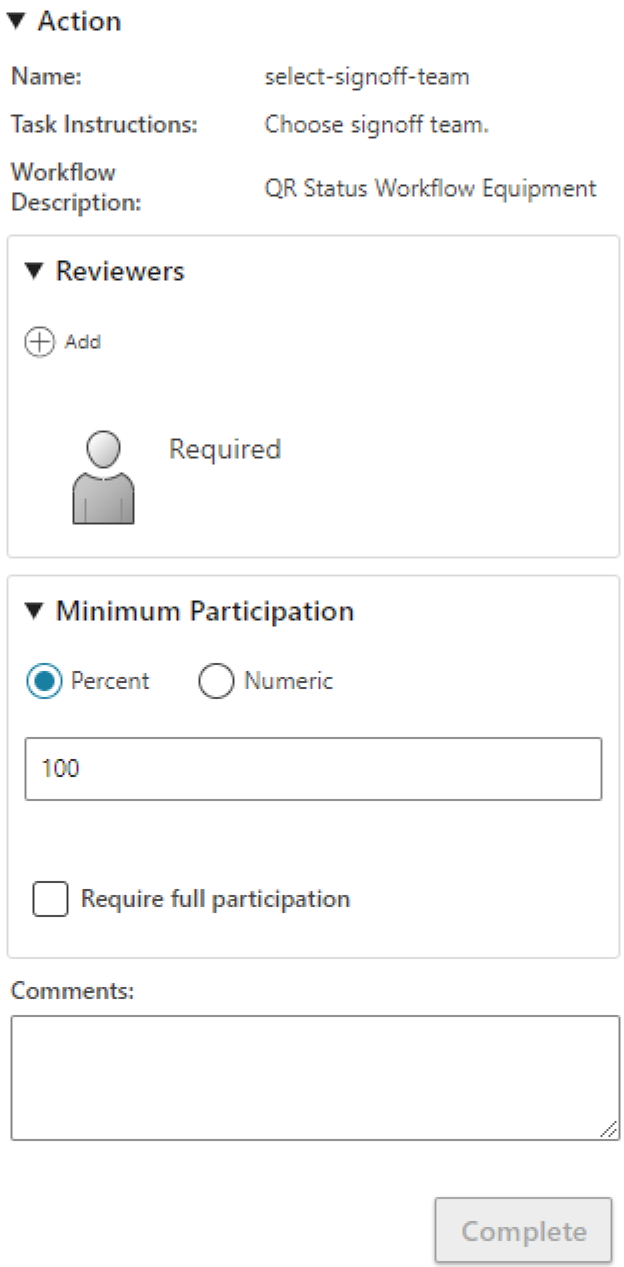
B. Under **Action** in the **Overview** tab, enter your comments in the **Comments** box.

C. Click **Complete**.

The workflow creates a **select-signoff-team** task for you.

g. Complete the **select-signoff-team** task as follows:

A. In the **INBOX** tile, select the **select-signoff-team** task for the qualification unit.



B. In the **Reviewers** section, click **Add** ⊕ to assign reviewers.

C. In the **Add** panel, search for and select the reviewers, and click **Add**.

D. Specify the reviewer's level of participation in the **Minimum Participation** section.

E. Enter your comments in the **Comments** box, and click **Complete**.

The workflow creates a **perform-signoffs** task for the selected reviewers.

After the reviewers provide their approval, and the assignee completes all qualification units, the workflow updates the status of the profile qualification definition to **Qualified** in the **Profile Qualification Definitions** tab. In the **Qualifications** tab, the workflow updates the status of the qualification records to **Qualification Passed**.

The associated quality action's **Due Date** is updated by adding the qualification unit's **Renewal Period** to the current date.

11. Download the qualification certificate

As a trainee, you can download the qualification certificate once you pass or complete the assigned qualifications.

Procedure

1. Open the required qualification profile.

2. Click the **Qualification** tab.

3. Select the required qualification which you want to download.

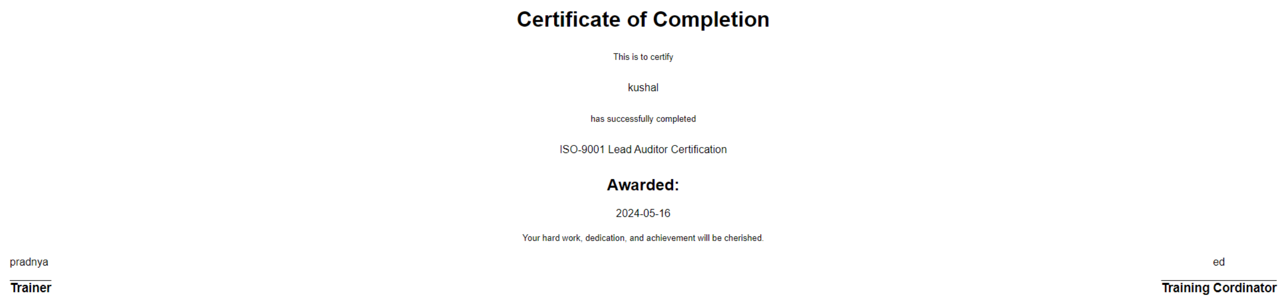
   > Note:
   >
   > You can only download the qualification certificates that are in passed or completed state.

4. Choose **More Commands** > **New** > **Generate Report**.

5. In the **Generate Report** panel, select **Training Certificate**.

6. Click **Generate**.

   The qualification certificate is downloaded.



Certificate of Completion

This is to certify

kushal

has successfully completed

ISO-9001 Lead Auditor Certification

Awarded:

2024-05-16

Your hard work, dedication, and achievement will be cherished.

pradnya

Trainer

ed

Training Cordinator

12. Answer the questions in a checklist

A checklist consists of a list of questions that define the acceptance criteria for a qualification unit. The checklists allow the manager to perform an effectiveness review of the training for all employees to ensure that the employees understood the training. Additionally, trainers can use the checklist to prepare an Effectiveness Review test. Also, the trainees can go through the checklist at the end of the training to verify that they have understood the training content correctly.

Each qualification unit can have one or more checklists associated to it, and each checklist can have multiple chapters, questions, and subquestions. Multiple questions and subquestions ensure that none of the acceptance criteria is inadvertently overlooked. Further, the questions are designed in such a way that they can be answered with a simple *yes* or *no*. The *Training Coordinator* must create and release the checklists in the **Quality Master Data** library for the checklists to be available for assignment in a qualification unit.

1. Navigate to the **Effectiveness Review Checklist** section of the qualification unit and open the checklist.

2. Expand the chapters to view the checklist questions.

3. In the **Comment** column, add a comment about why you have selected a specific answer.

4. To assign a resource to work on a question, do the following:

    a. Select the question and choose **More Commands** ••• > **Manage** > **Assign Resource**.

    b. In the **Assign Resource** panel, search for and select the resource, and click **Assign**.

5. To assign a due date for a question, do the following:

    a. Select the question and choose **More Commands** ••• > **Manage** > **Assign Due Date**.

    b. In the **Assign Due Date** panel, specify a due date, and click **Assign**.

6. To answer the checklist questions, do the following:

    a. Select the checklist question, and click **Information** to view the question details.

    b. Click **Edit** and specify a due date for the chapter, question, or subquestion in **Due Date**.

    c. From the **State** list, select an option to specify the status of the question.

    d. From the **Answer** list, select the required option.

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

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

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

e. Click **Save**.

13. Use the Qualification Matrix to track the completion status of qualification profiles

The Qualification Matrix provides an overview of the completion status of each *qualification profile* and their assigned *qualification definitions*. This matrix also displays which qualification definitions are not assigned to a qualification profile. This allows you to assign these qualification definitions, if required. You can also notify the qualification profiles if their completion status is not as per schedule.

Procedure

1. In the **Quality Management** workspace, click the **TRAINING AND QUALIFICATION** tile.

2. From the **Select Qualification Profiles** list, select the required qualification profiles.

3. From the **Select Qualification Definitions** list, select the required qualification definitions.

4. Click **Show Matrix**.