Action Module with examples

Digital management starts with PLM

Highstage

Scope

- **Session 1**: Presenting the Action module. A presentation only.
- **Session 2**: Defining Actions. Using XML to create and modify Actions in your own environment. Conclude with an agreed assignment after class.
- **Session 3**: Re-union with Q&A to discuss and clarify issues surfaced during the home assignment.

A Highstage module

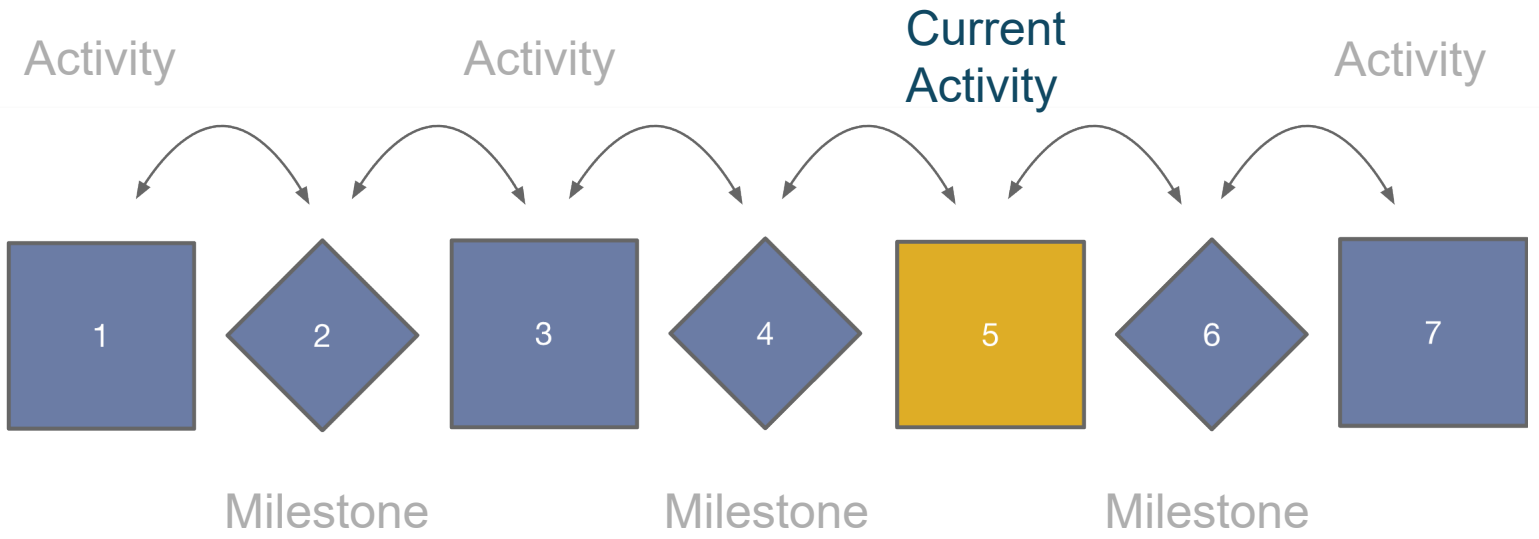
- Unlike Document, Part and Device modules the Action module can be used to model any process *(Change, Project, CAPA, Complaint etc.)*

Behavior overview

	Documents	Actions
Revisions	X	-
Reviewers/Approvers	X	-
Manager	-	X
Sequence	-	X
Deadlines	*- (schema)*	X
Resources	-	X
Process	*- (review/appr.)*	X
Can implement procedures (SOP's)	-	X
Requires document file	X	-
Enforce document/records production	-	X

LINEAR SEQUENCE FOR ANY PROCESS

PROCESS LIFECYCLE



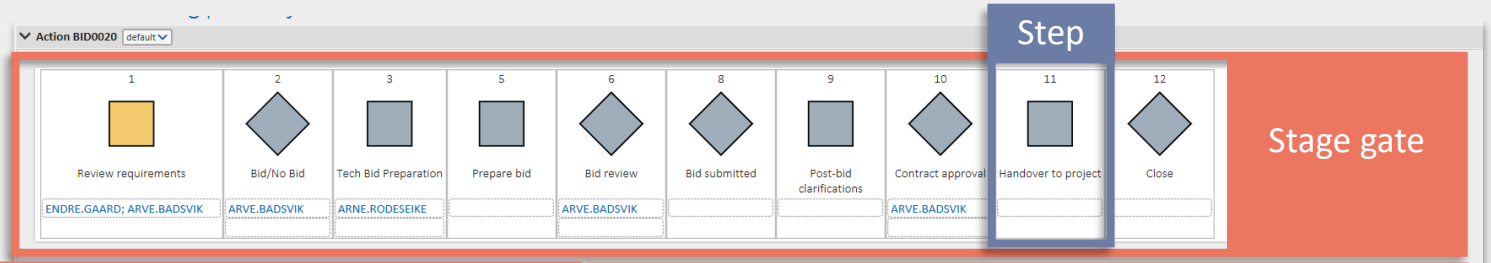
Follows a linear sequence *(Stage Gate Model)*

Manage processes

- Define steps and gates according to procedure
- Define document suggestions and requirements for each step
- Acquire metadata for each step
- Provide guidance and requirements

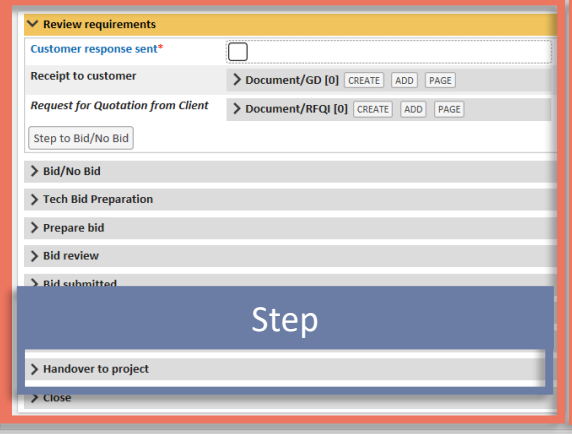
Action overview

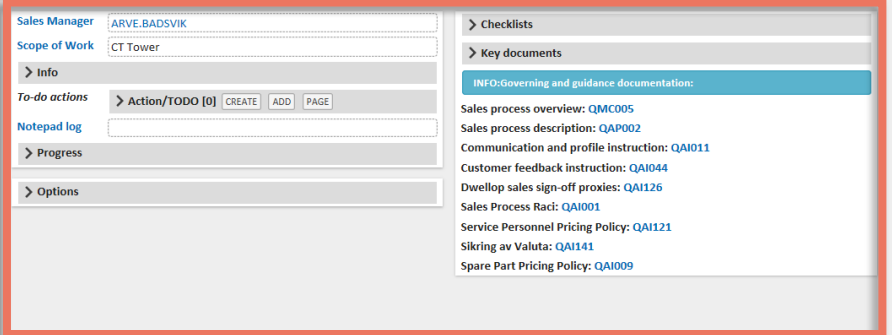
All defined in subtype schemas



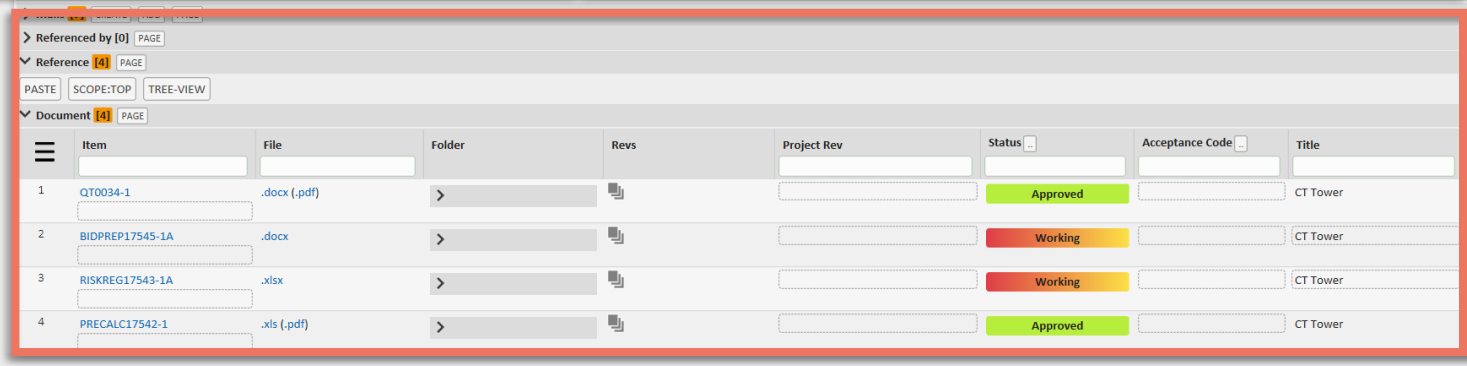
Stage gate

Custom step details



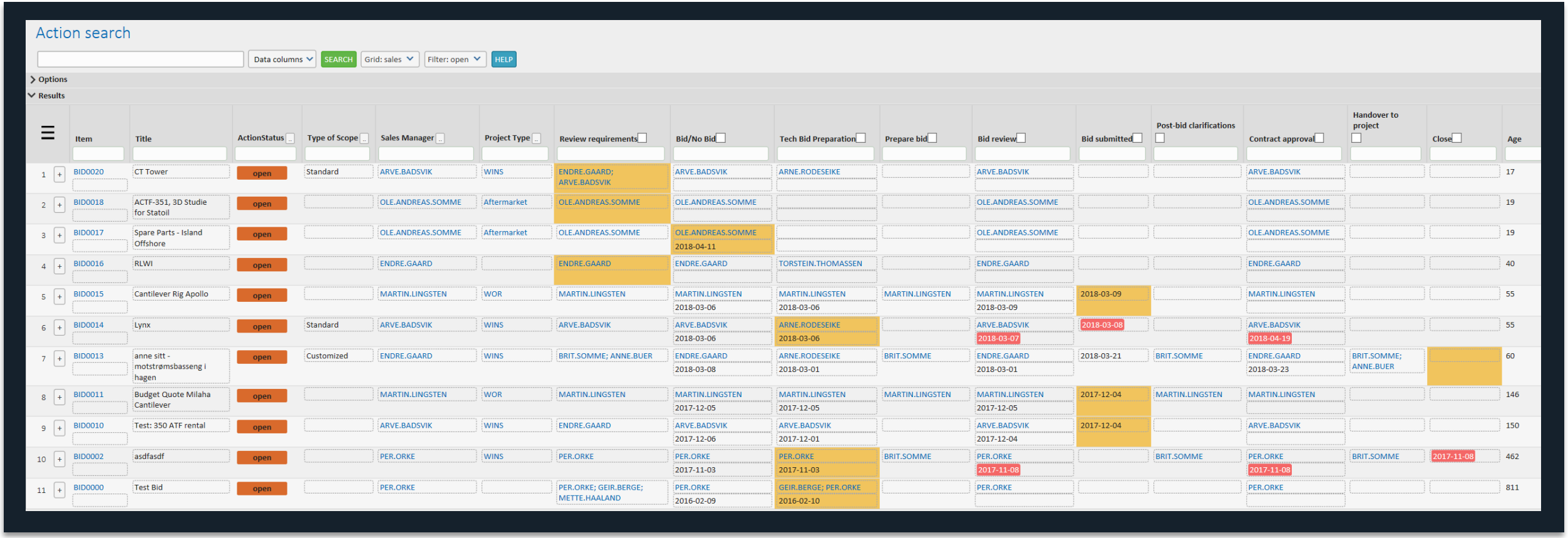


Custom information. E.g procedure refs



Associated Emails & References

Full overview and control



Action search

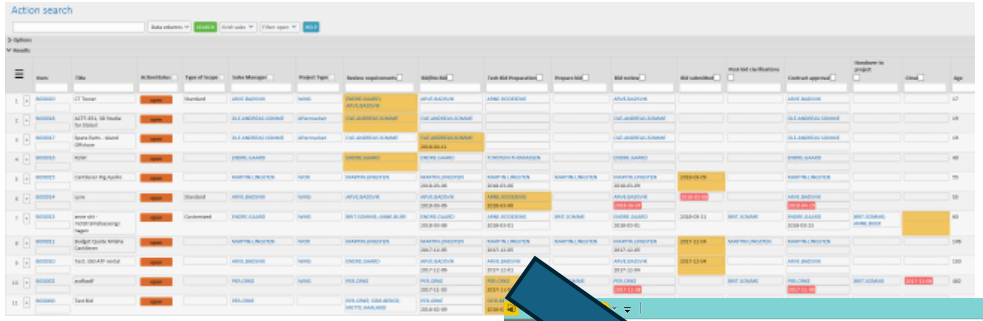
Data columns | SEARCH | Grid: sales | Filter: open | HELP

Options

Results

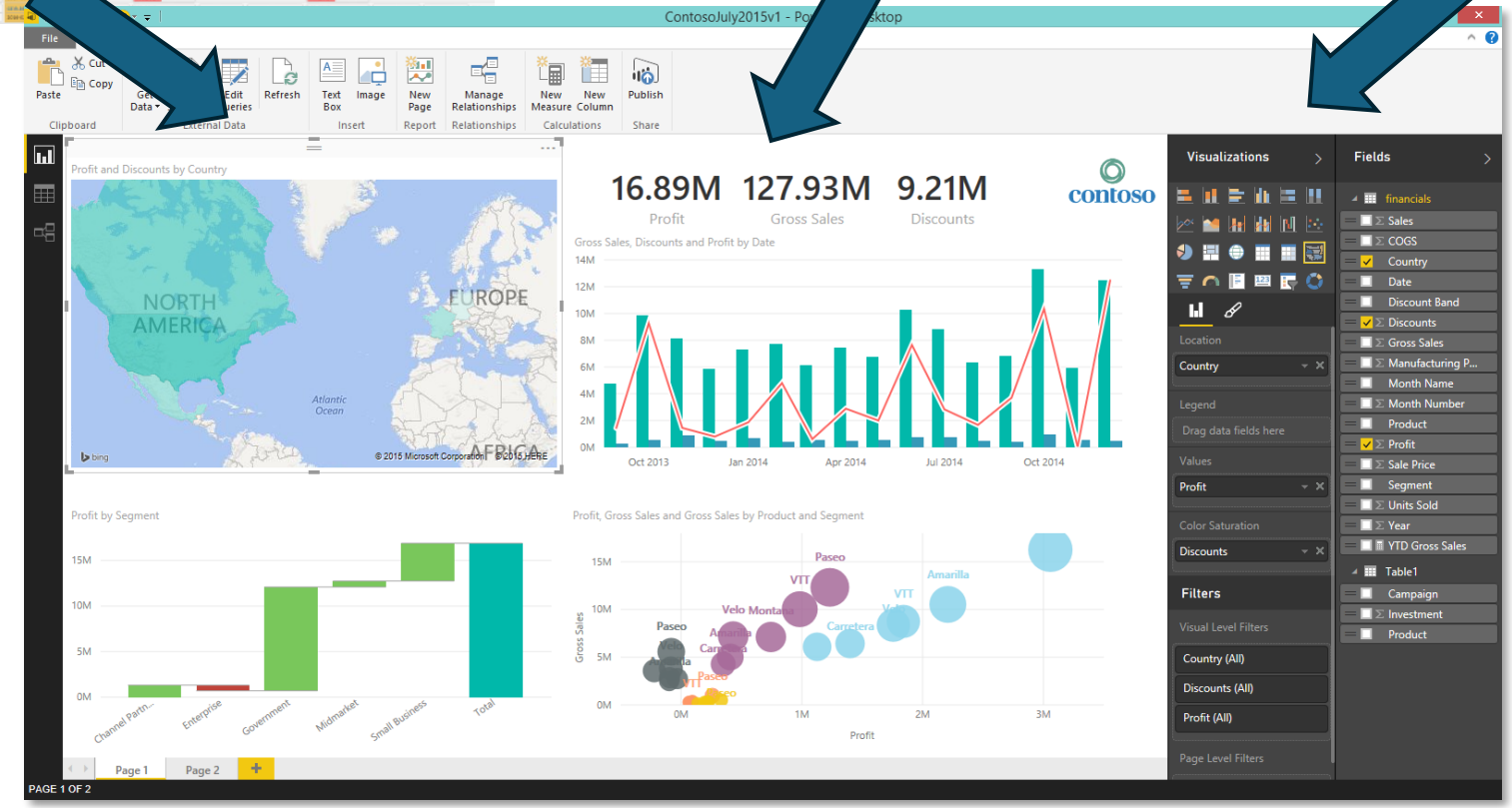
	Item	Title	ActionStatus	Type of Scope	Sales Manager	Project Type	Review requirements	Bid/No Bid	Tech Bid Preparation	Prepare bid	Bid review	Bid submitted	Post-bid clarifications	Contract approval	Handover to project	Close	Age
1	BID0020	CT Tower	open	Standard	ARVE.BADSVIK	WINS	ENDRE.GAARD; ARVE.BADSVIK	ARVE.BADSVIK	ARNE.RODESEIKE		ARVE.BADSVIK			ARVE.BADSVIK			17
2	BID0018	ACTF-351, 3D Studie for Statoil	open		OLE.ANDREAS.SOMME	Aftermarket	OLE.ANDREAS.SOMME	OLE.ANDREAS.SOMME			OLE.ANDREAS.SOMME			OLE.ANDREAS.SOMME			19
3	BID0017	Spare Parts - Island Offshore	open		OLE.ANDREAS.SOMME	Aftermarket	OLE.ANDREAS.SOMME	OLE.ANDREAS.SOMME 2018-04-11			OLE.ANDREAS.SOMME			OLE.ANDREAS.SOMME			19
4	BID0016	RLWI	open		ENDRE.GAARD		ENDRE.GAARD	ENDRE.GAARD	TORSTEIN.THOMASSEN		ENDRE.GAARD			ENDRE.GAARD			40
5	BID0015	Cantilever Rig Apollo	open		MARTIN.LINGSTEN	WOR	MARTIN.LINGSTEN	MARTIN.LINGSTEN 2018-03-06	MARTIN.LINGSTEN 2018-03-06	MARTIN.LINGSTEN	MARTIN.LINGSTEN 2018-03-09	2018-03-09		MARTIN.LINGSTEN			55
6	BID0014	Lynx	open	Standard	ARVE.BADSVIK	WINS	ARVE.BADSVIK	ARVE.BADSVIK 2018-03-06	ARNE.RODESEIKE 2018-03-06		ARVE.BADSVIK 2018-03-07	2018-03-08		ARVE.BADSVIK 2018-04-19			55
7	BID0013	anne sitt - motstrømsbasseng i hagen	open	Customized	ENDRE.GAARD	WINS	BRIT.SOMME; ANNE.BUER	ENDRE.GAARD 2018-03-08	ARNE.RODESEIKE 2018-03-01	BRIT.SOMME	ENDRE.GAARD 2018-03-01	2018-03-21	BRIT.SOMME	ENDRE.GAARD 2018-03-23	BRIT.SOMME; ANNE.BUER		60
8	BID0011	Budget Quote Milaha Cantilever	open		MARTIN.LINGSTEN	WOR	MARTIN.LINGSTEN	MARTIN.LINGSTEN 2017-12-05	MARTIN.LINGSTEN 2017-12-05	MARTIN.LINGSTEN	MARTIN.LINGSTEN 2017-12-05	2017-12-04	MARTIN.LINGSTEN	MARTIN.LINGSTEN			146
9	BID0010	Test: 350 ATF rental	open		ARVE.BADSVIK	WINS	ENDRE.GAARD	ARVE.BADSVIK 2017-12-06	ARVE.BADSVIK 2017-12-01		ARVE.BADSVIK 2017-12-04	2017-12-04		ARVE.BADSVIK			150
10	BID0002	asdfasdf	open		PER.ORKE	WINS	PER.ORKE	PER.ORKE 2017-11-03	PER.ORKE 2017-11-03	BRIT.SOMME	PER.ORKE 2017-11-08		BRIT.SOMME	PER.ORKE 2017-11-08	BRIT.SOMME	2017-11-08	462
11	BID0000	Test Bid	open		PER.ORKE		PER.ORKE; GEIR.BERGE; METTE.HAALAND	PER.ORKE 2016-02-09	GEIR.BERGE; PER.ORKE 2016-02-10		PER.ORKE			PER.ORKE			811

Business Intelligence



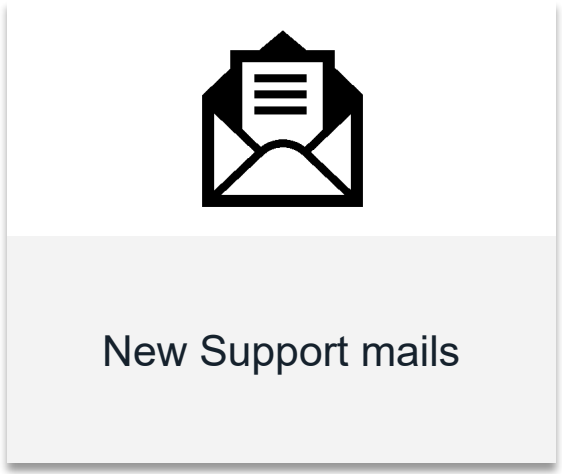
e·conomic

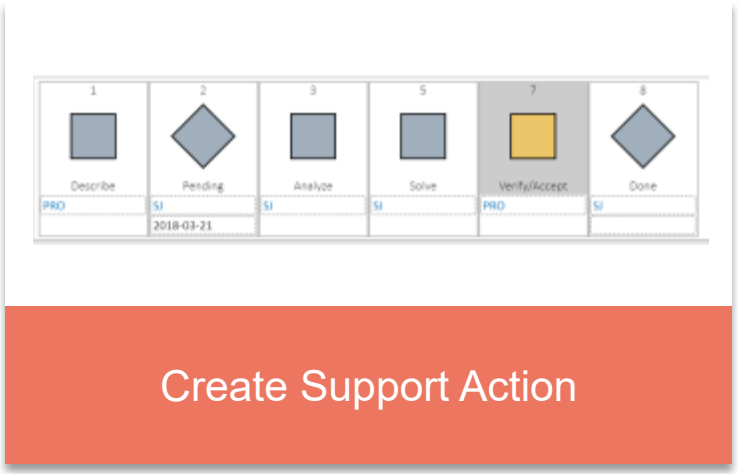
Microsoft Dynamics 365
Business Central



Action create from mail

SUPPORT
EXAMPLE





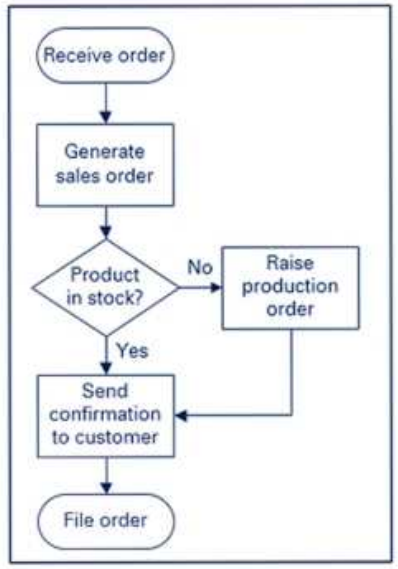
Create any number of Action processes with….

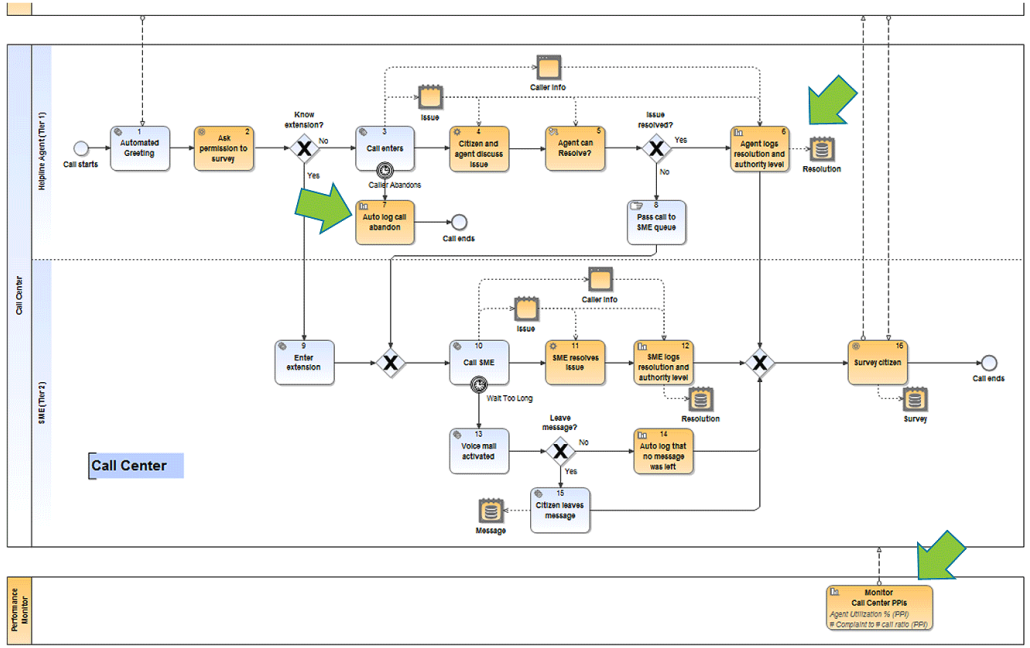
- Between 1 – 16 steps for each Action process
- Assign any number of select users to be responsible for completing each individual step with optional deadlines.
- Define whether any number of mandatory and/or optional Documents, Actions, Parts, Devices etc. should be created and completed in each individual step.
- Define any number of mandatory and/or optional fields to be filled in each step.

Why use Actions?

- Deploy/enforce corporate best practices
- Improved overview and control
- Improved compliance
- Implement procedures

Other common and more complex models





Flowchart

- **Decision branching**
- **Media**
- **Parallel paths**

BPML Business Process Modelling Language

- **Swim lanes**
- **Organization and technology sensitive**

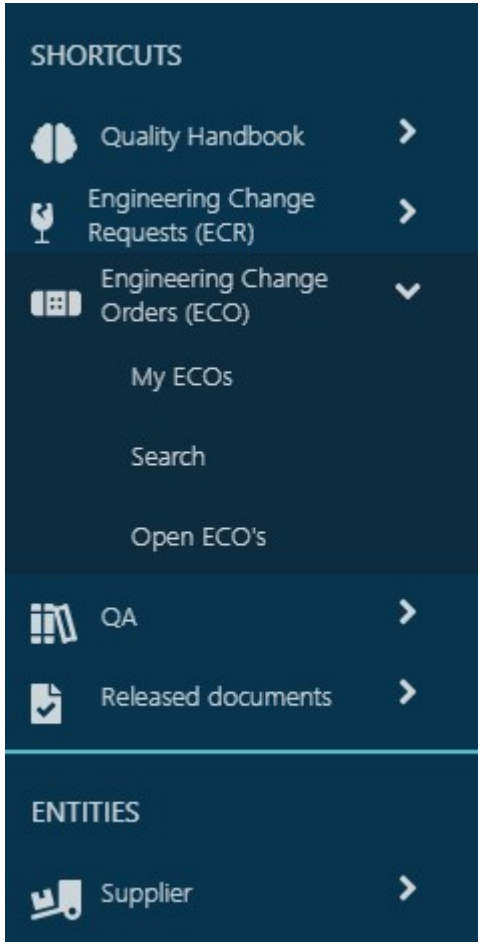
Action Module ECO examples

Digital management starts with PLM

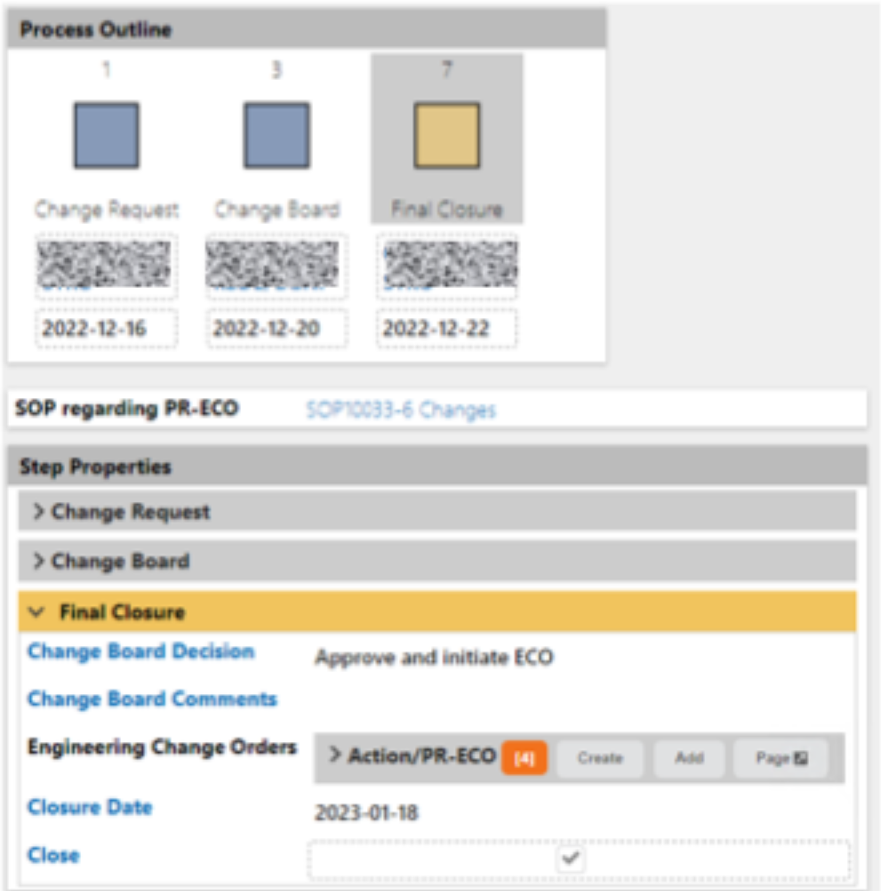
Highstage

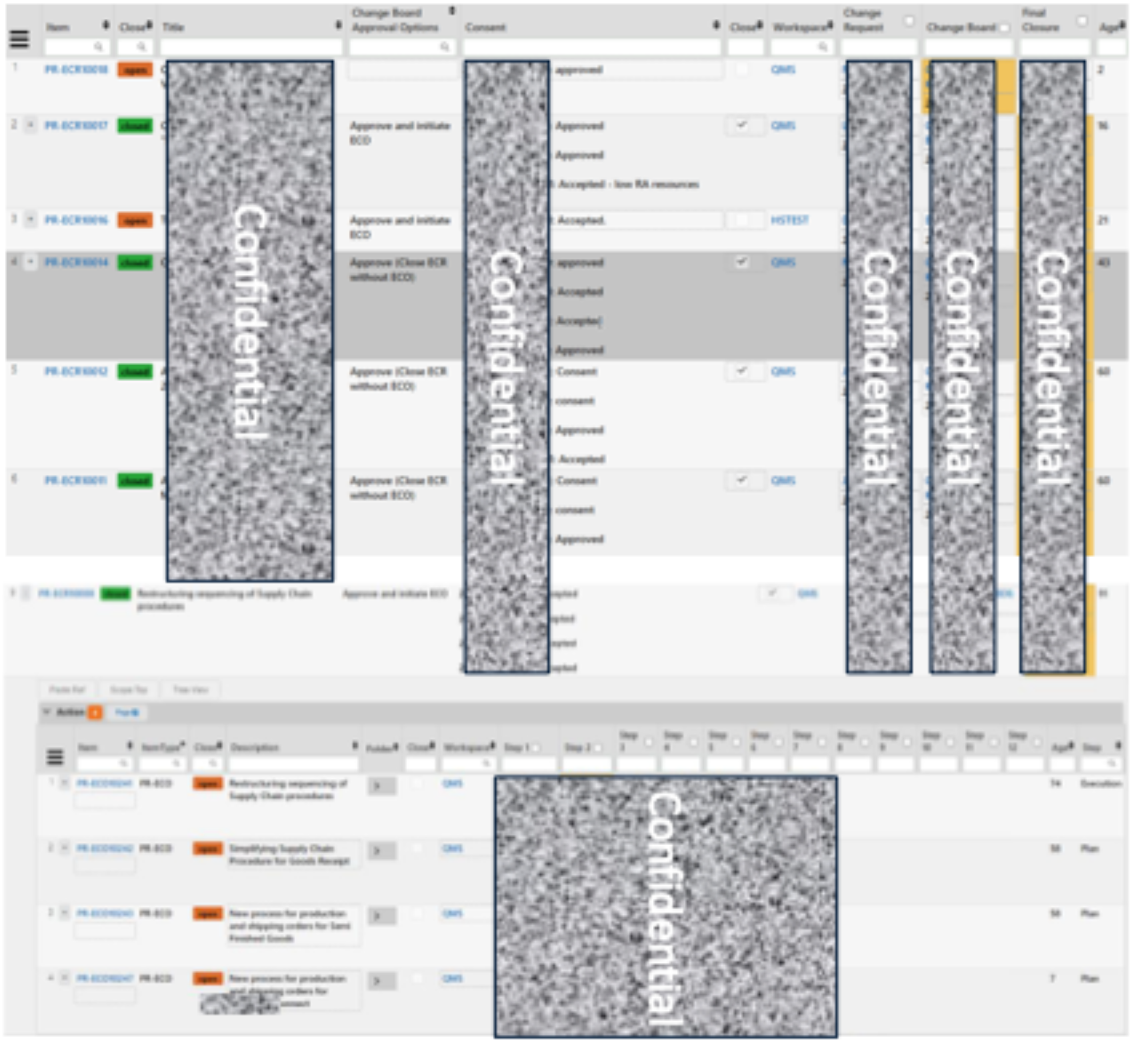
ECR/ECO examples

- ECR are used to evaluate and decide on the change
- ECO is spawned from ECR if ECR is approved
- ECO can change release status of parts (may be the only way to alter release status)



ECR sample


Process Outline
1
3
7
Change Request
Change Board
Final Closure
2022-12-16
2022-12-20
2022-12-22
SOP regarding PR-ECO
SOP10033-6 Changes
Step Properties
Change Request
Change Board
Final Closure
Change Board Decision
Approve and initiate ECO
Change Board Comments
Engineering Change Orders
Action/PR-ECO
Create
Add
Page
Closure Date
2023-01-18
Close


Confidential
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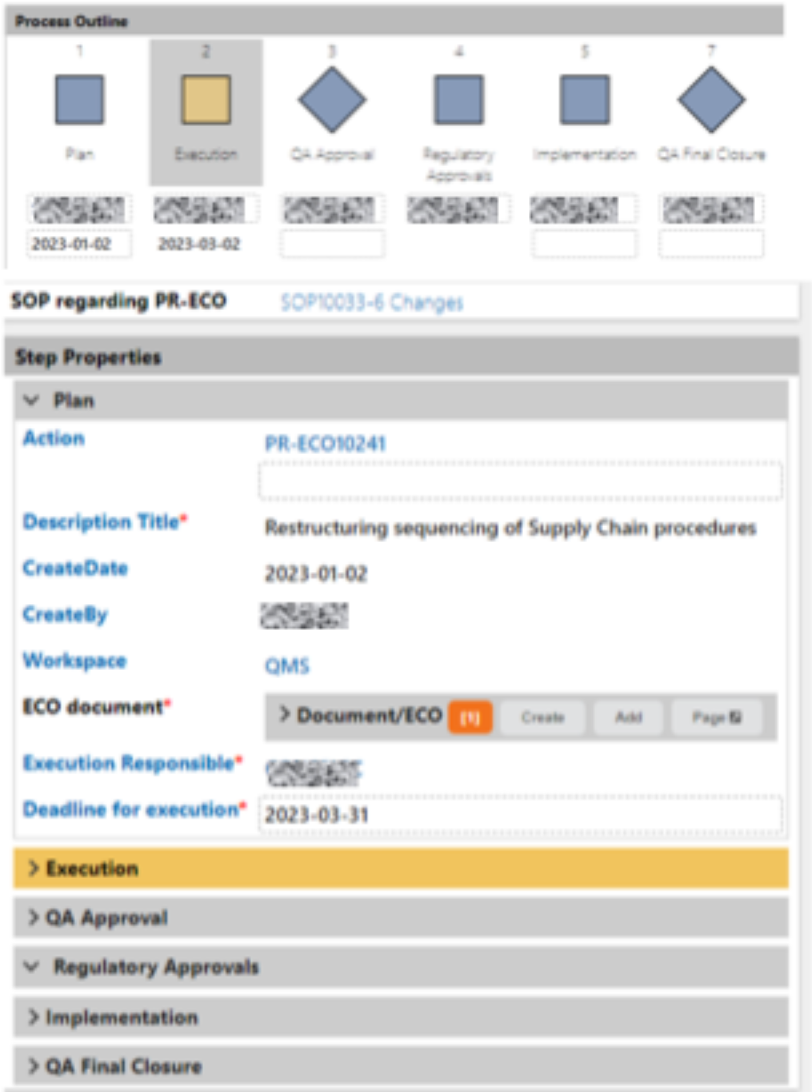
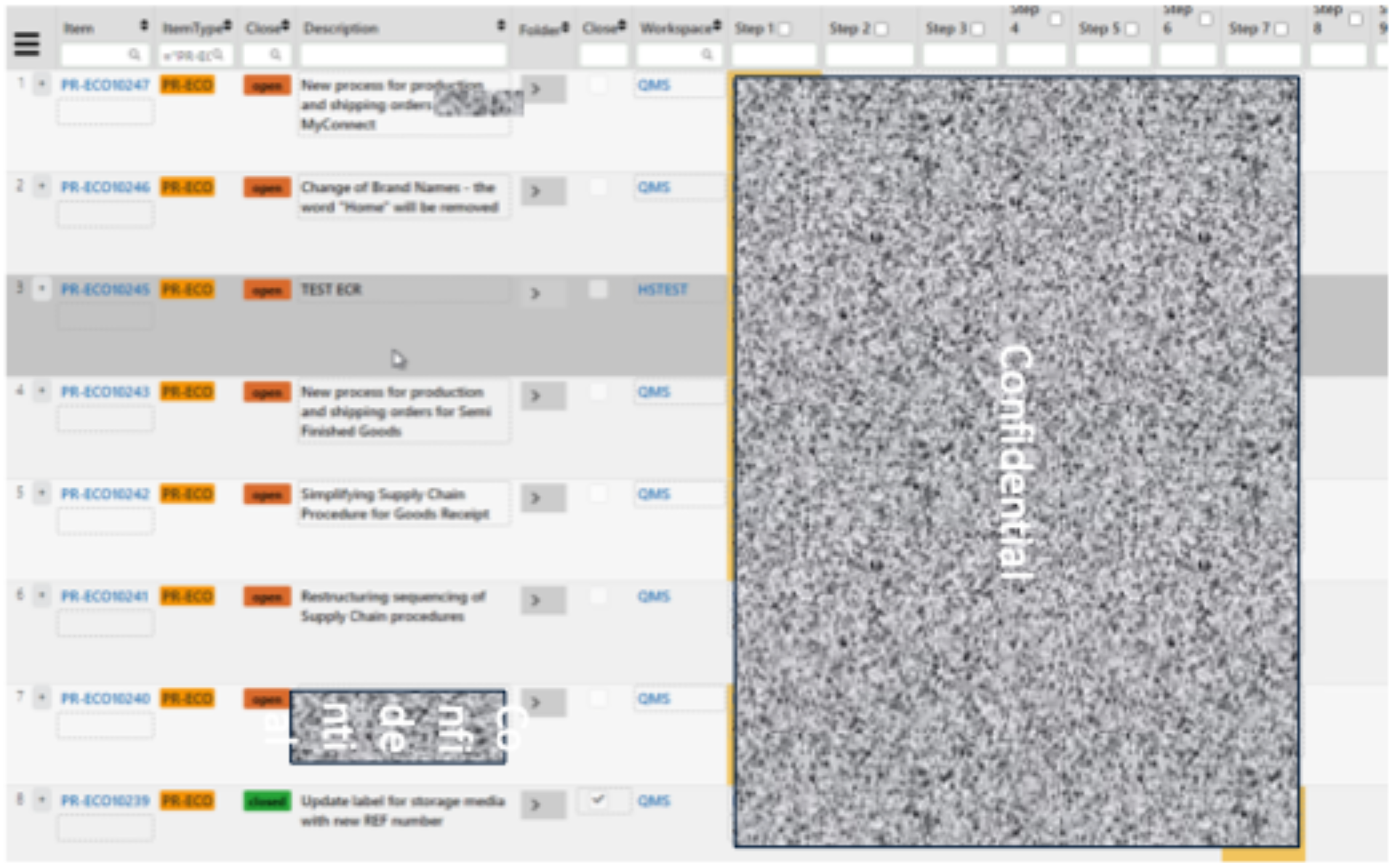
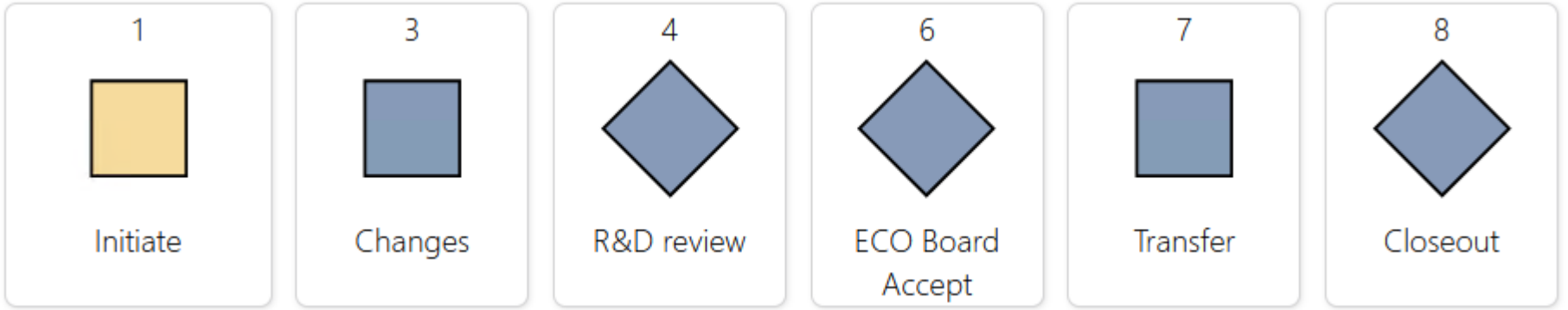
ECR sample – Product Defect

Process ECO sample



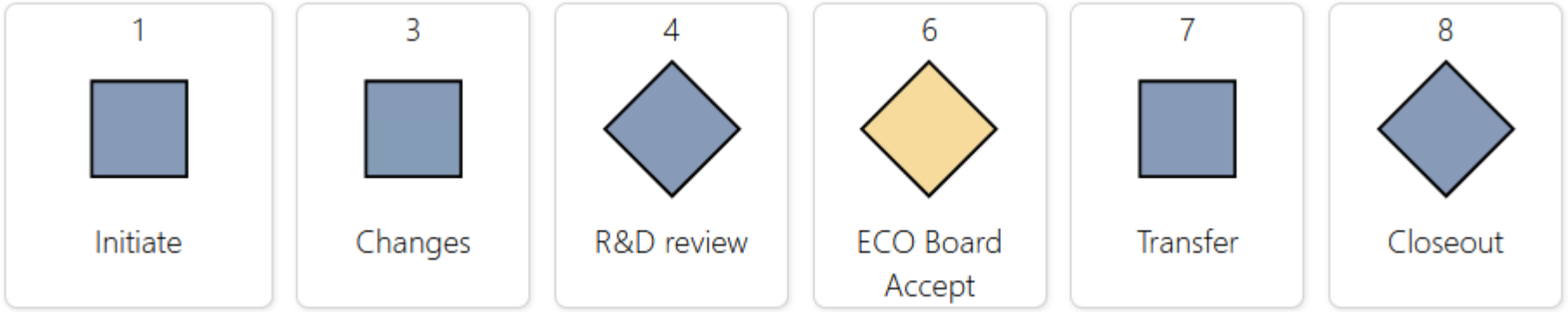


Product ECO - Initiate – Start work



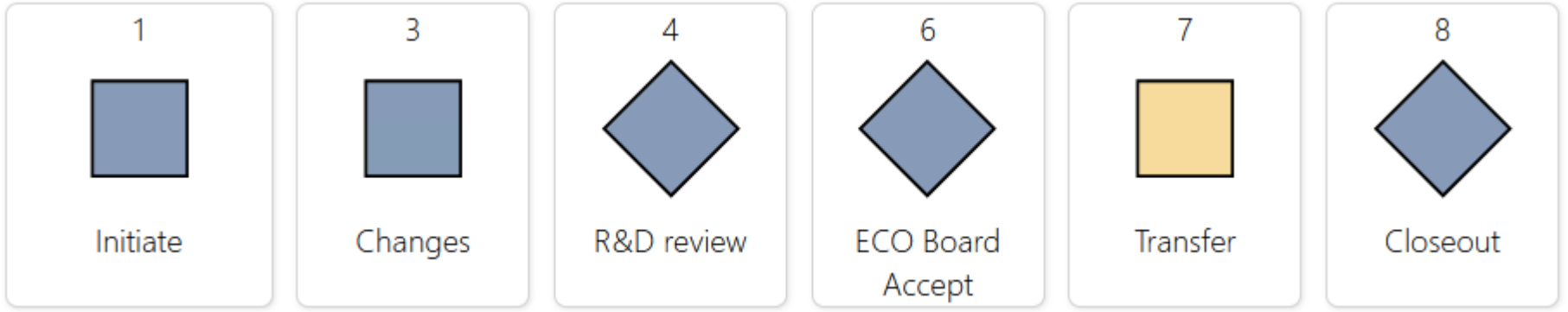
Item	Legacy ID	Status	Description	Note	Workspace	EventTime	LifeCycleStatus
2-1693[redacted]		Working	S/N LABEL DETECTOR[redacted]		Parts	2023-03-15	In Development
4-1972[redacted]		Working	DETECTOR (MACHINING)		Parts	2023-03-15	In Development

Product ECO - Board Accept



Item	Legacy ID	Status	Description	Note	Workspace	EventTime	LifeCycleStatus
2-1693-14	[redacted]	Approved	S/N LABEL DETECTOR [redacted]		Parts	2023-03-15	In Development
4-1972-4	[redacted]	Approved	DETECTOR (MACHINING)		Parts	2023-03-15	In Development

Product ECO - Transfer parts to production



Item	Legacy ID	Status	Description	Note	Workspace	EventTime	LifeCycleStatus
2-1693-14	[redacted]	Approved	S/N LABEL DETECTOR [redacted]		Parts	2023-03-15	In Production
4-1972-4	[redacted]	Approved	DETECTOR (MACHINING)		Parts	2023-03-15	In Production

- Transition to Transfer stage sets LifeCycleStatus

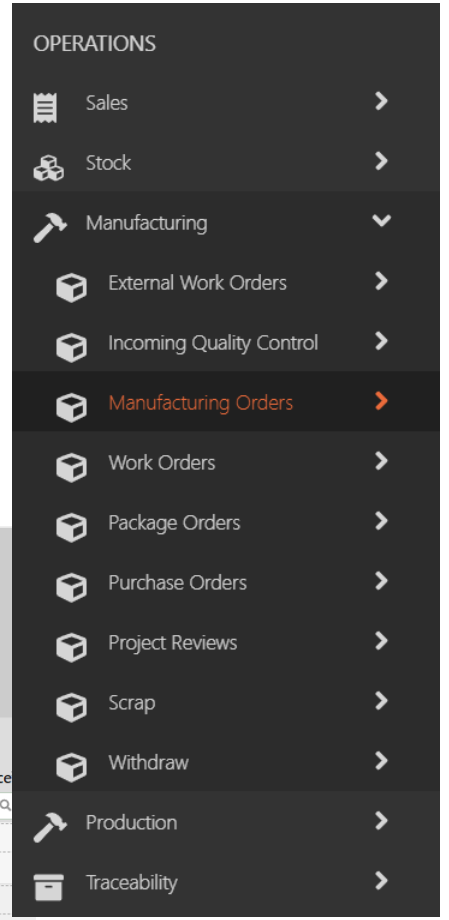
Action Module Manufacturing logistics and traceability examples (medtech)

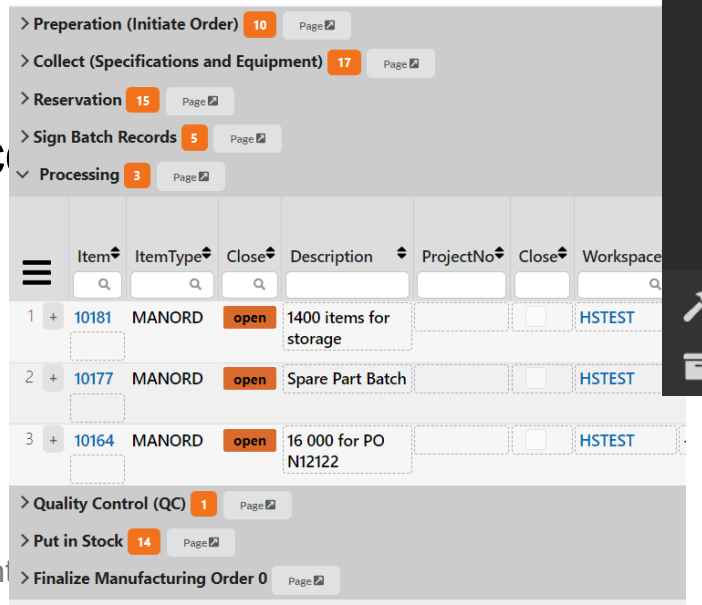
Digital management starts with PLM

Highstage

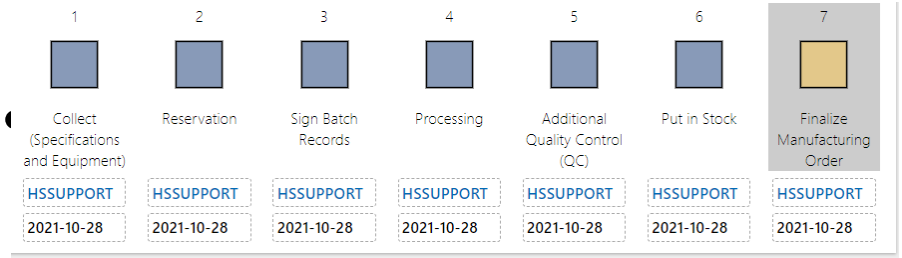
Manuf. Logistics and traceability examples

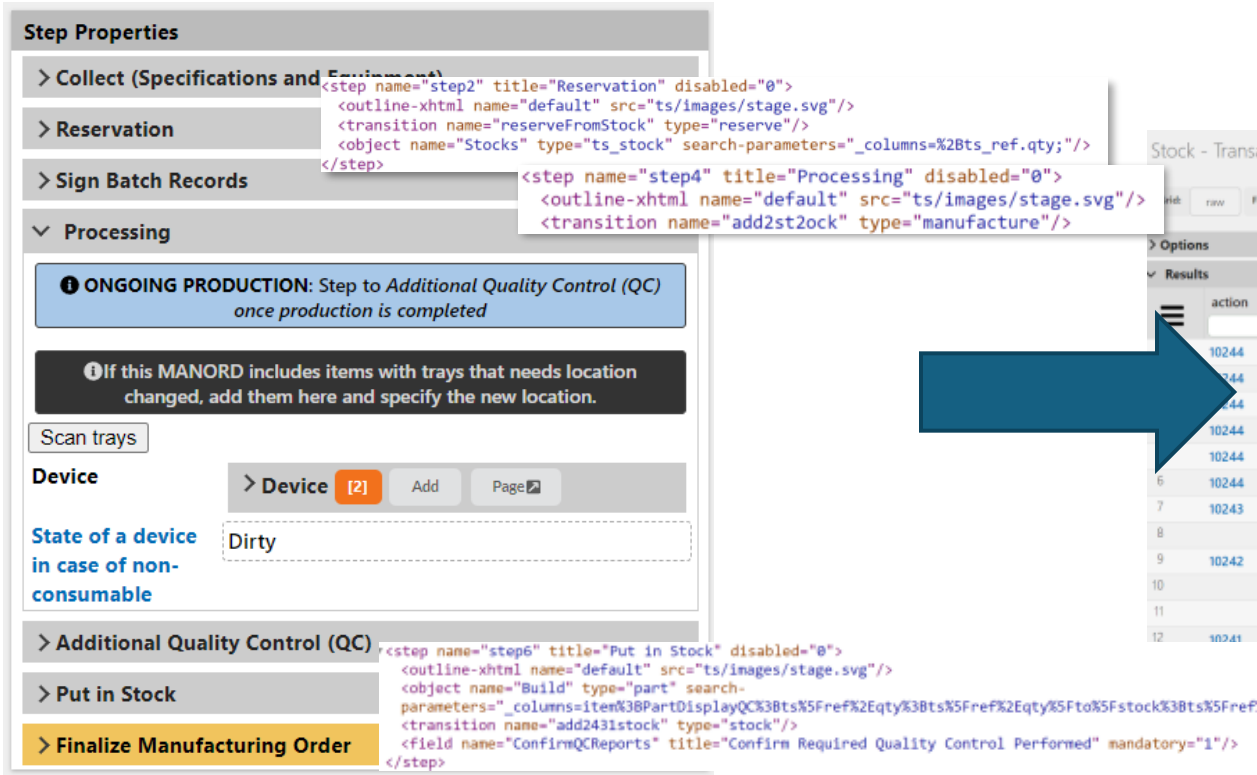
- Manufacturing Work order has got «transitions» in stage promotions
- «Transitions» perform work like
  - Move goods from one storage location to another
  - Adds/removes from stock
  - Depleats remaining stocks
  - Scraps stock items base on non-c

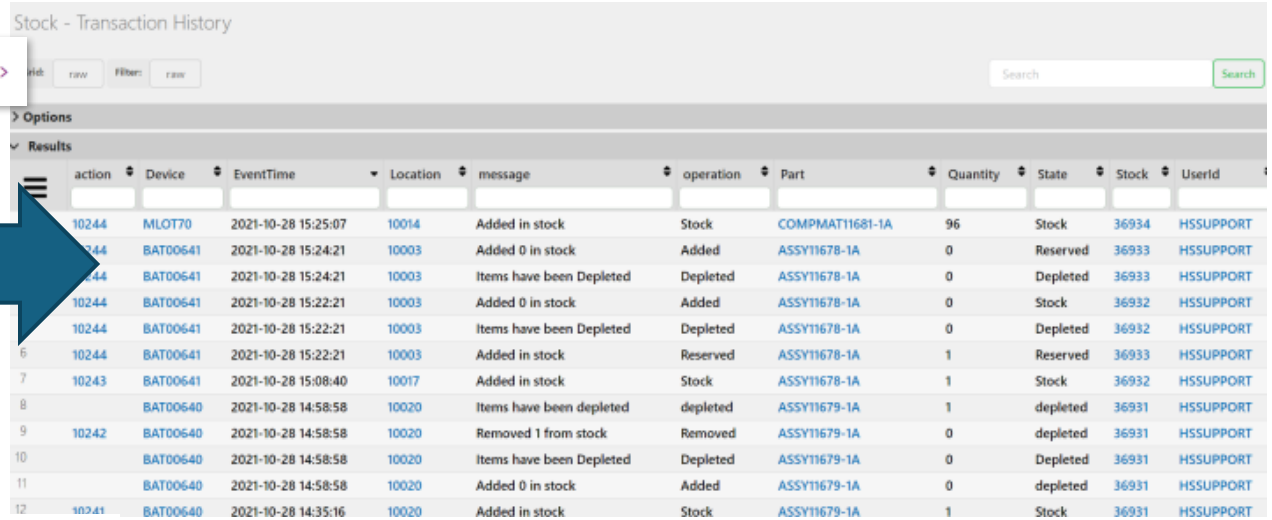




Manufacturing work orders (medtech)

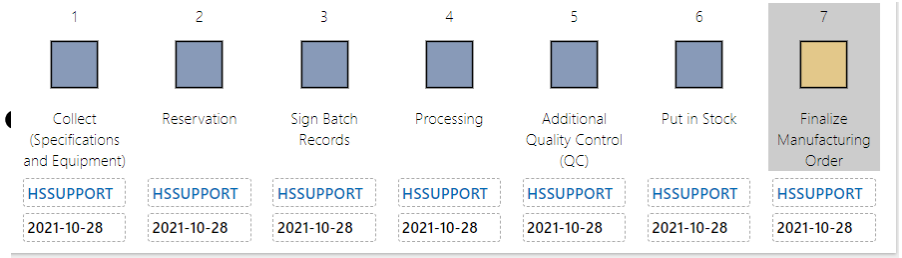






with PLM

Manufacturing work orders (medtech)



Step Properties

- Collect (Specifications and Equipment)
- Reservation
- Sign Batch Records
  - Confirm Line Clearance is performed*
  - Select Work Instruction*: WIDK10698-1; WIDK10679-1
  - Confirm Production Parameters are checked*
  - Confirm QC Specification*
- Processing
- Additional Quality Control (QC)
- Put in Stock
- Finalize Manufacturing Order
  - Close

Properties and Options

Share With

CopyTo

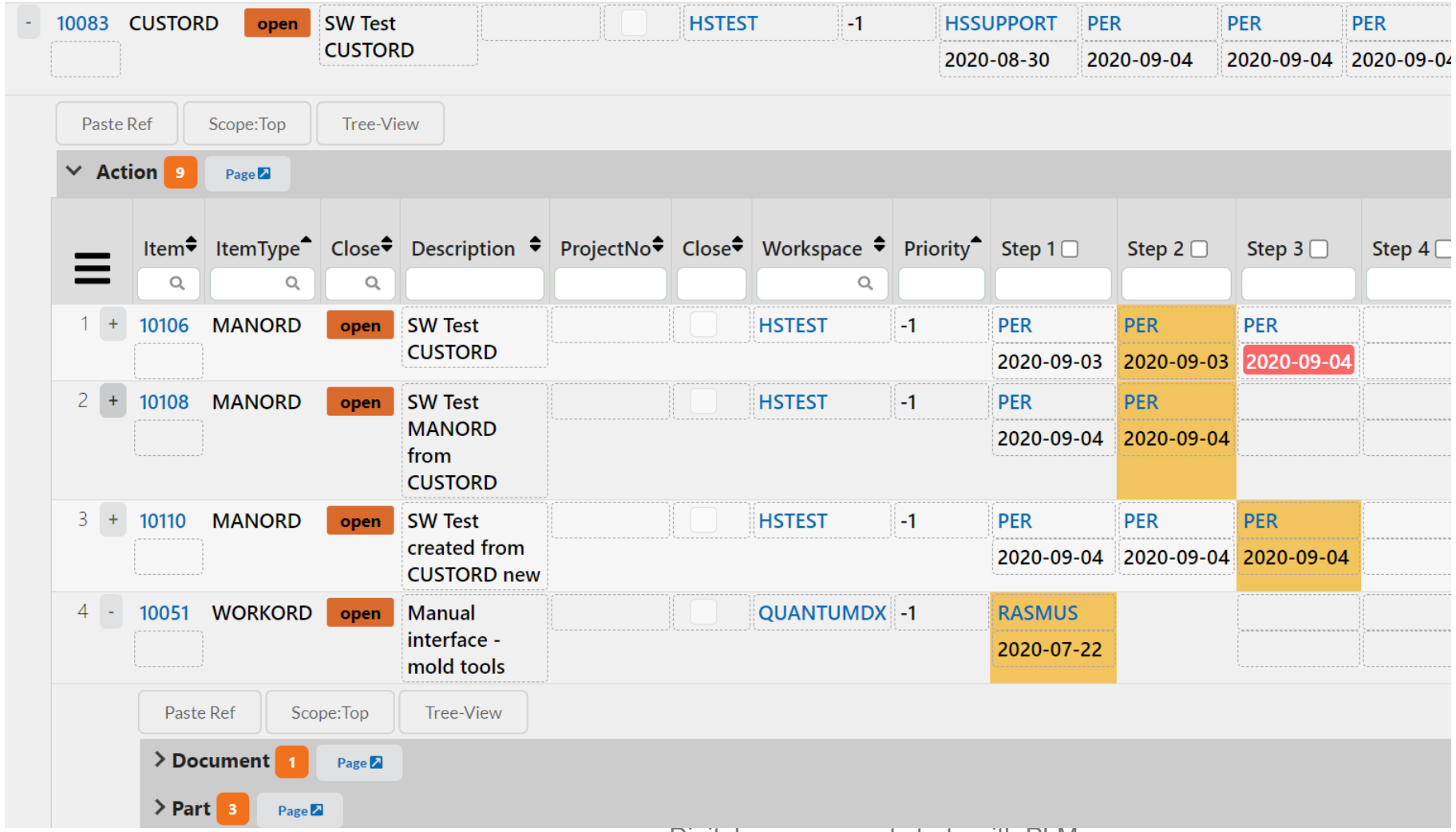
Close

Advanced

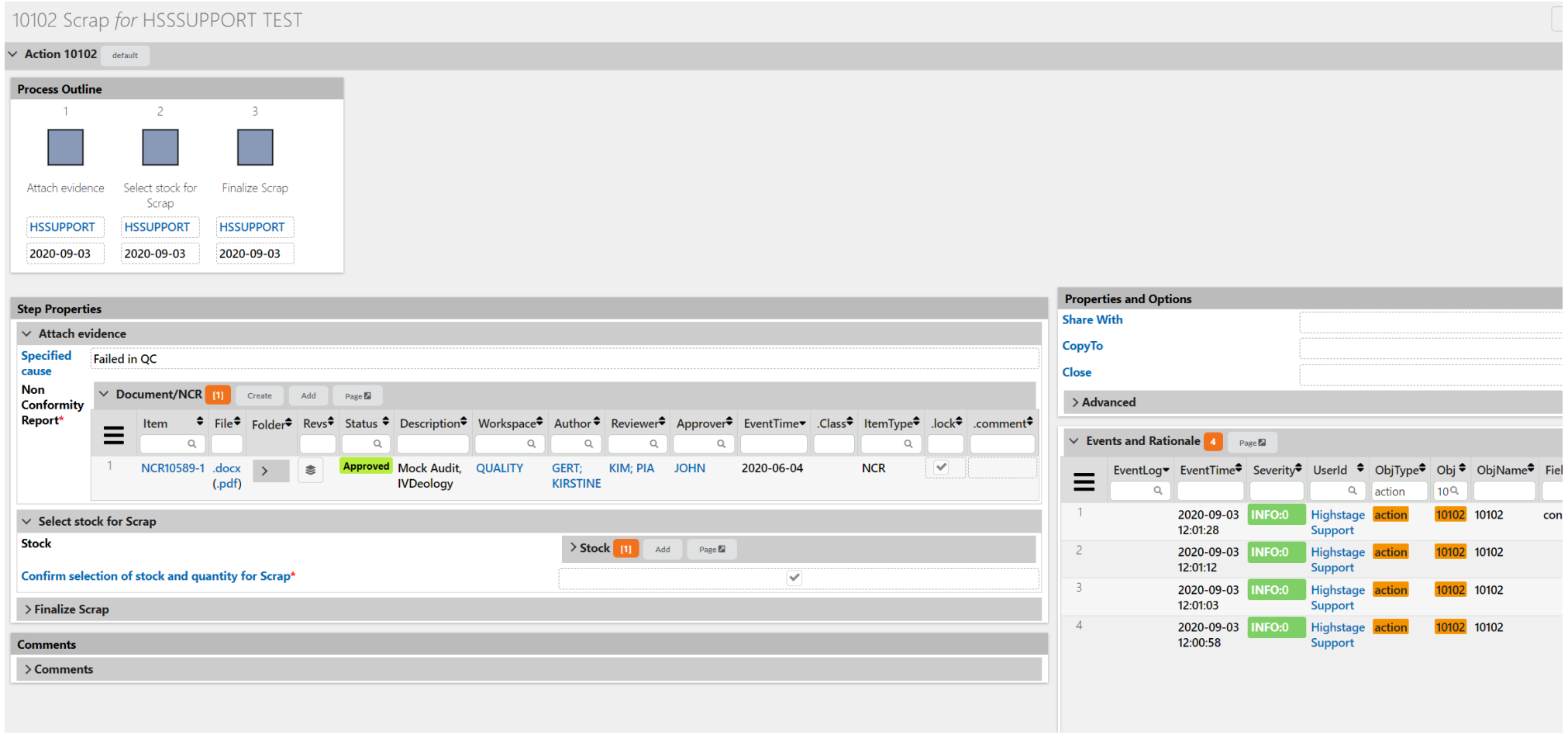
Events and Rationale 12 Page

	EventLog	EventTime	Severity	UserId	ObjType	Obj	ObjName	Field	Column	OldValue	NewValue	Message
					action	10						!=" "
1		2021-10-28 15:24:58	INFO:0	Highstage Support	action	10244	10244	confirmqcreports	confirmqcreports	0	1	nbvc
2		2021-10-28 15:24:21	INFO:0	Highstage Support	action	10244	10244					Add reference device MLOT70-1A
3		2021-10-28 15:23:23	INFO:0	Highstage Support	action	10244	10244					Add reference device TRAY1-1A
4		2021-10-28 15:22:21	INFO:0	Highstage Support	action	10244	10244					Add reference ts_stock 36933
5		2021-10-28 15:20:46	INFO:0	Highstage Support	action	10244	10244					Add reference ts_stock 36932
6		2021-10-28 15:20:46	INFO:0	Highstage Support	action	10244	10244	parttobuild	parttobuild		COMPMAT11681-1A	Updated the parttobuild column aft

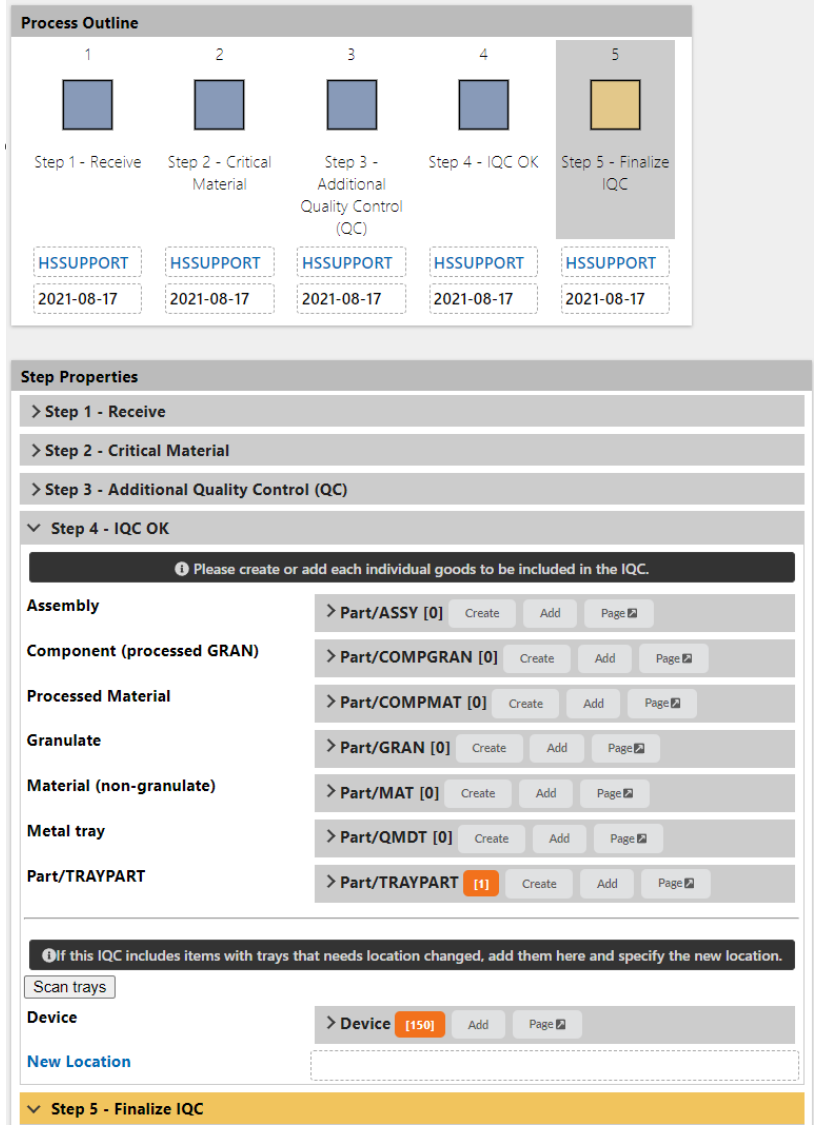
Manufacturing work orders (medtech)



Non-con to Scrap handling (medtech)



Incoming quality control (medtech)

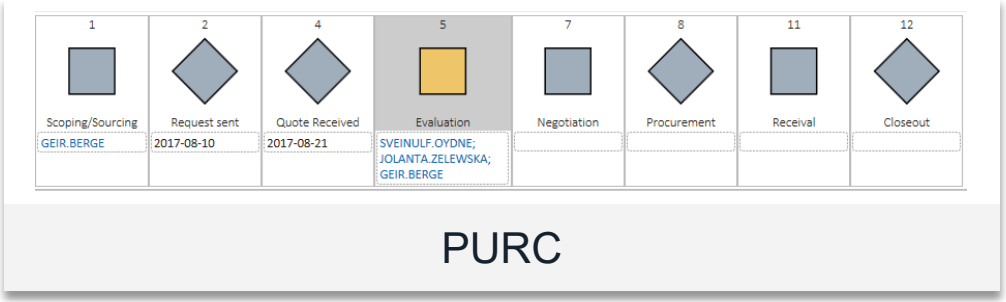


Action Module Project management examples

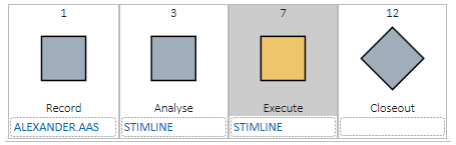
Digital management starts with PLM

Highstage

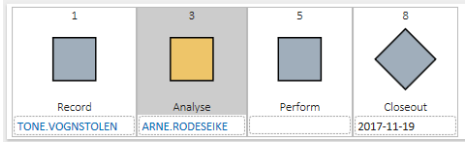
Project man. example



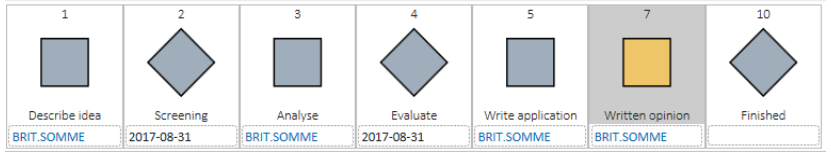
PURC



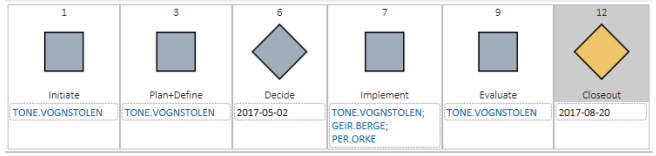
Punch



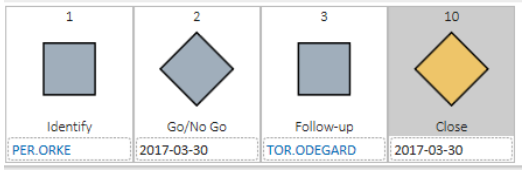
NonCon HSE impr.



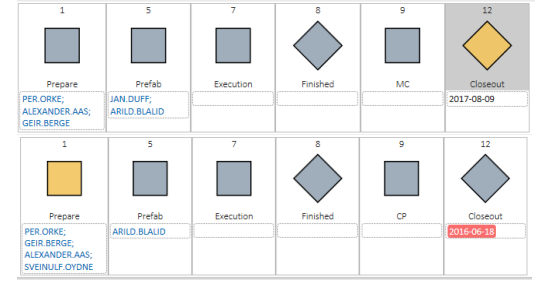
Patent



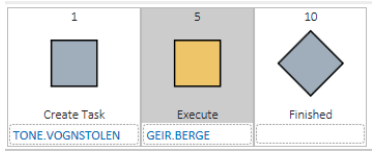
Change



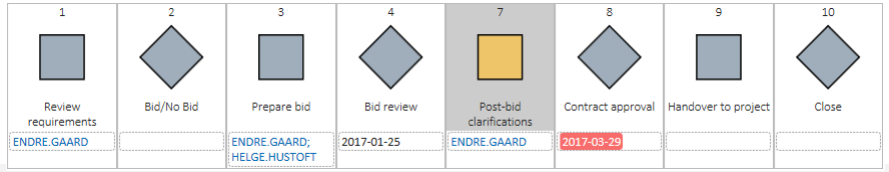
Lead



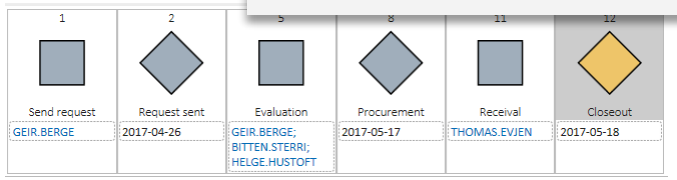
WP / CP



Todo

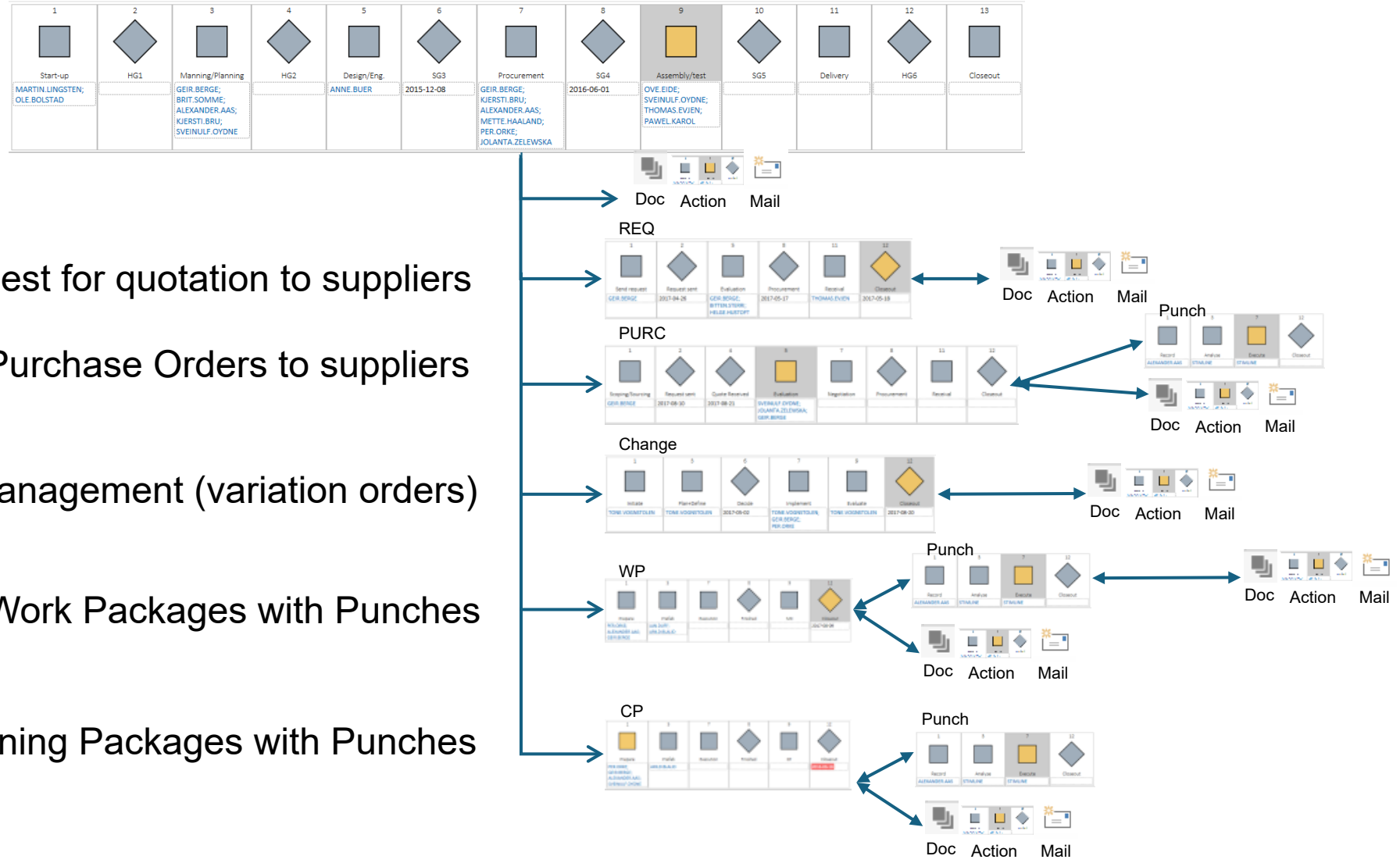


Bid



REQ

Project man. customer example



Request for quotation to suppliers

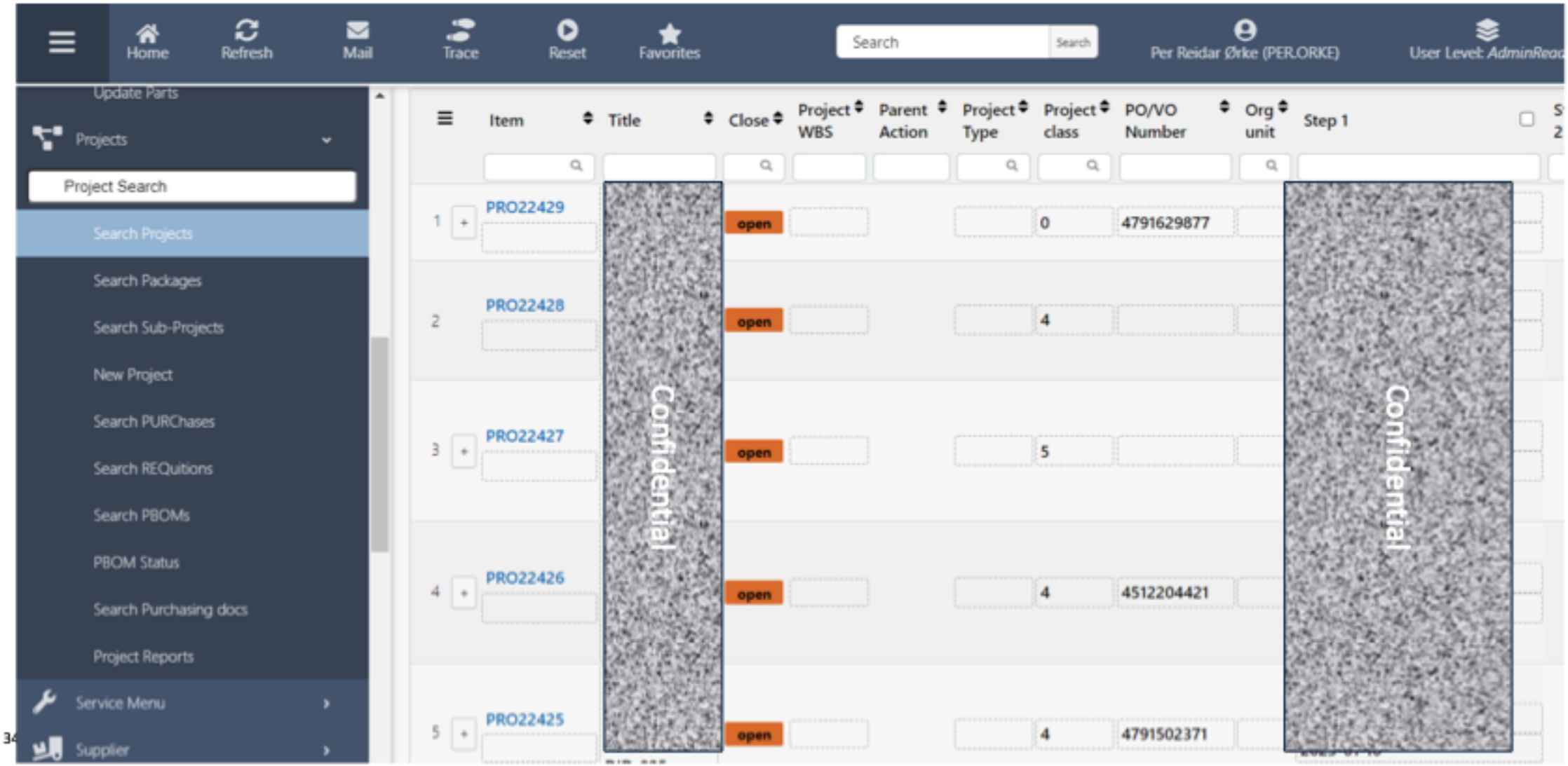
Purchase Orders to suppliers

Change management (variation orders)

Work Packages with Punches

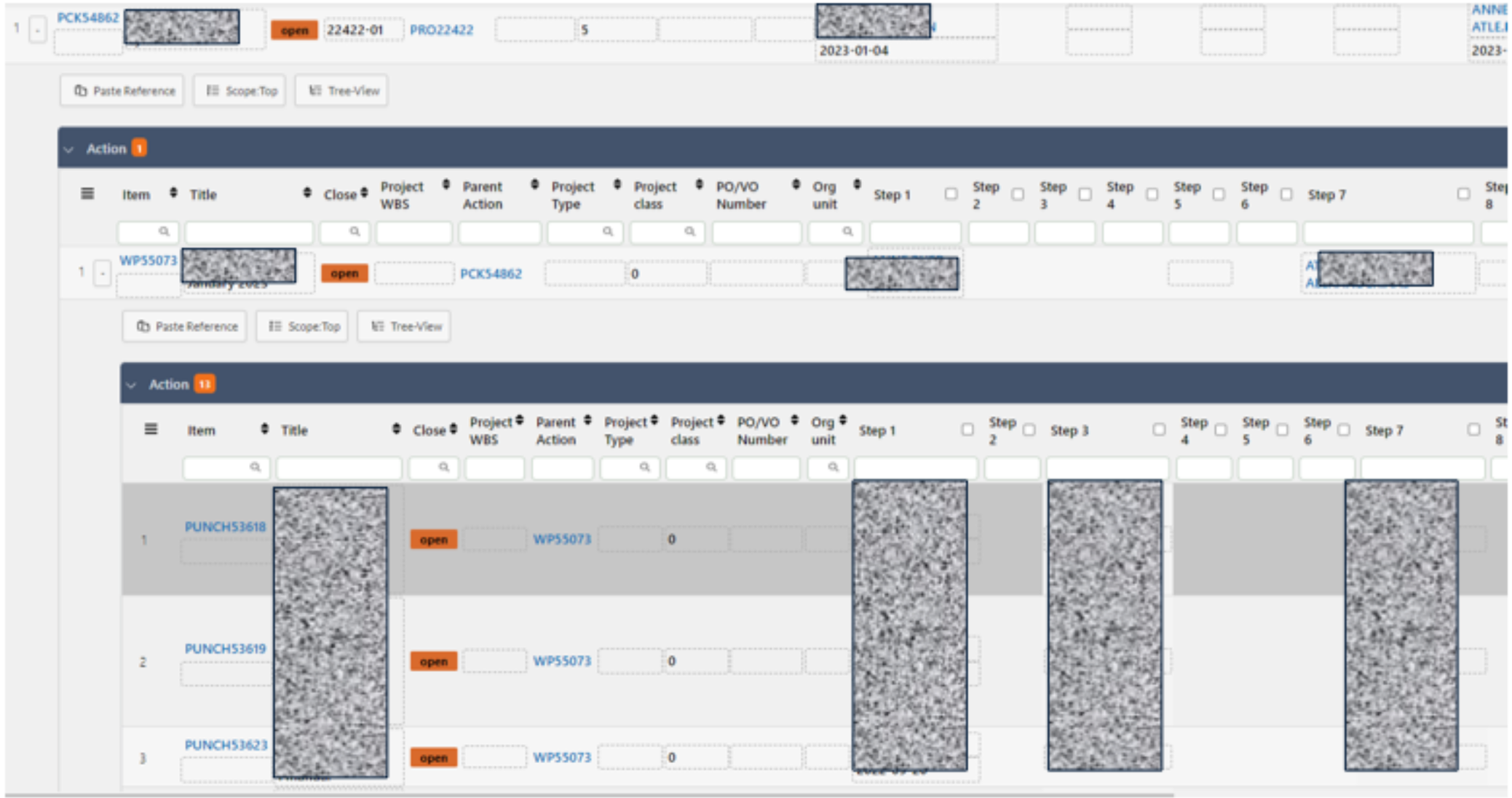
Commissioning Packages with Punches

Project man. customer example



Digital management starts with PLM

Project man. customer example

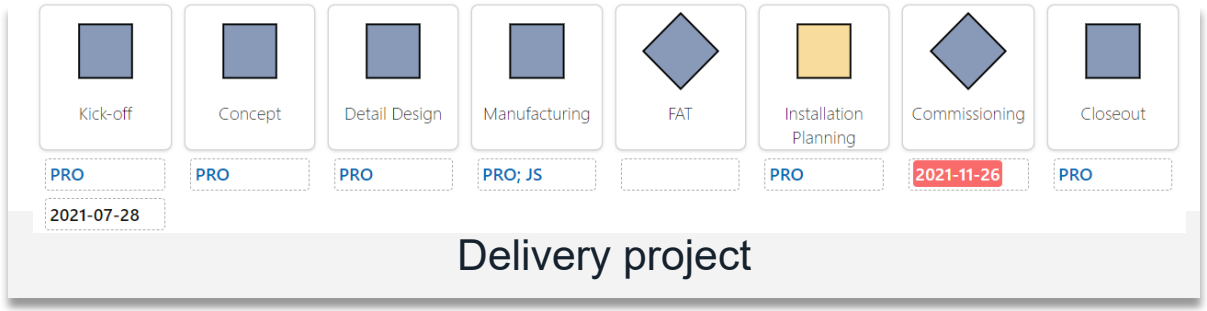


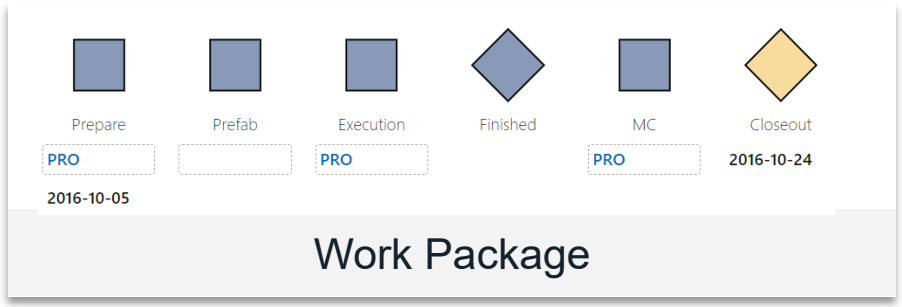
Action Module Delivery Project Example (internal demo server)

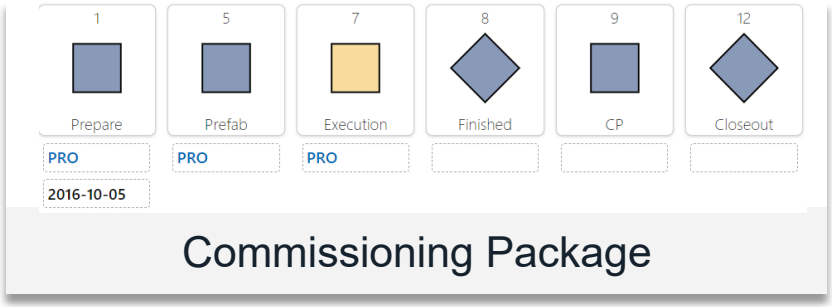
Digital management starts with PLM

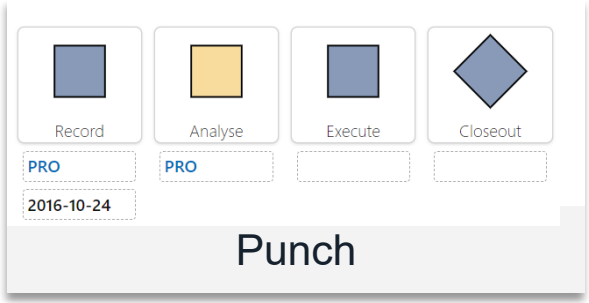
Highstage

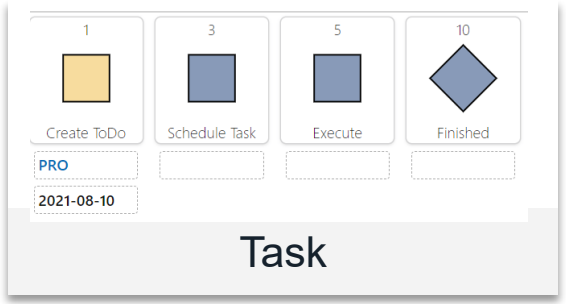
Delivery project demo example



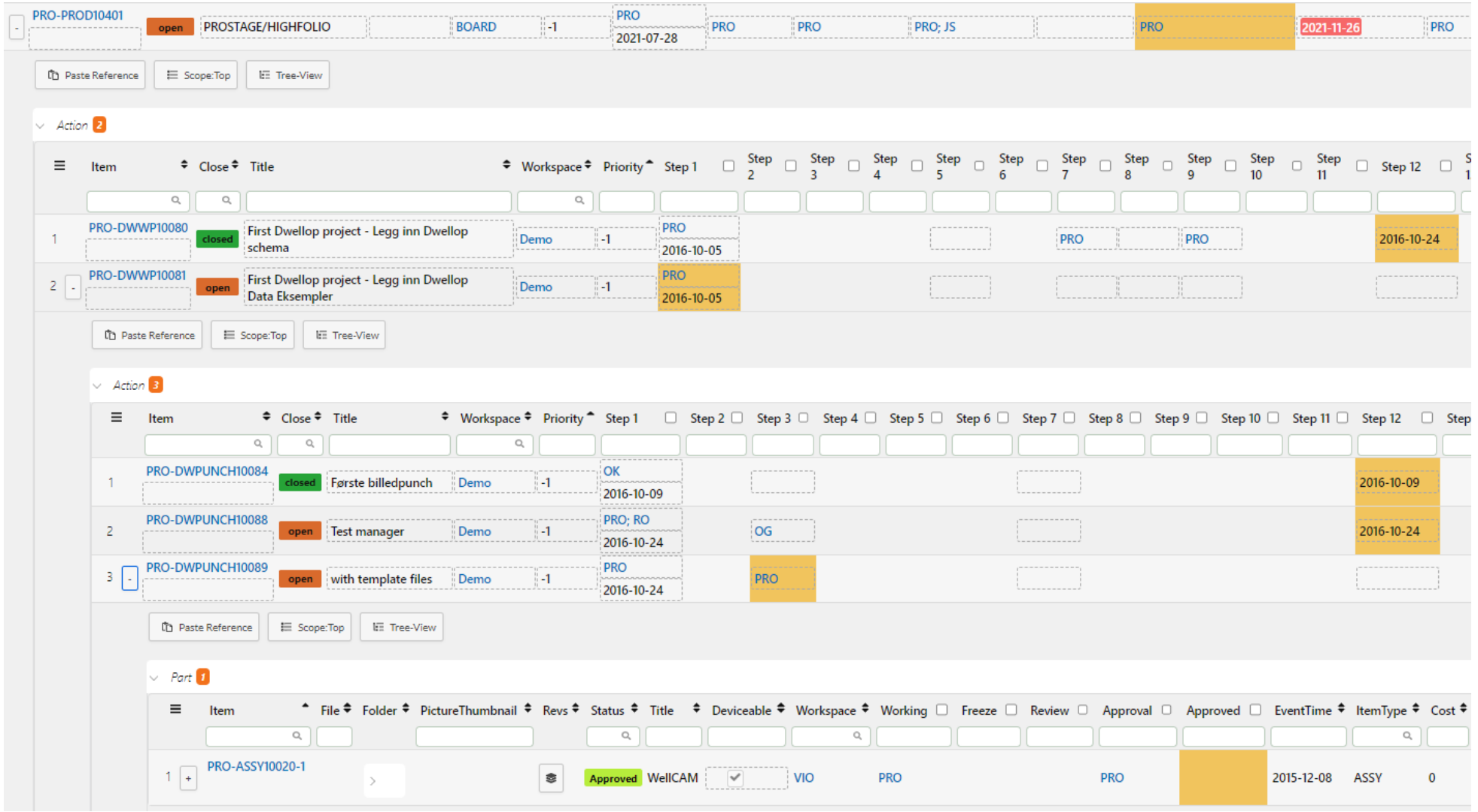








Delivery project demo example



Using the Action Module

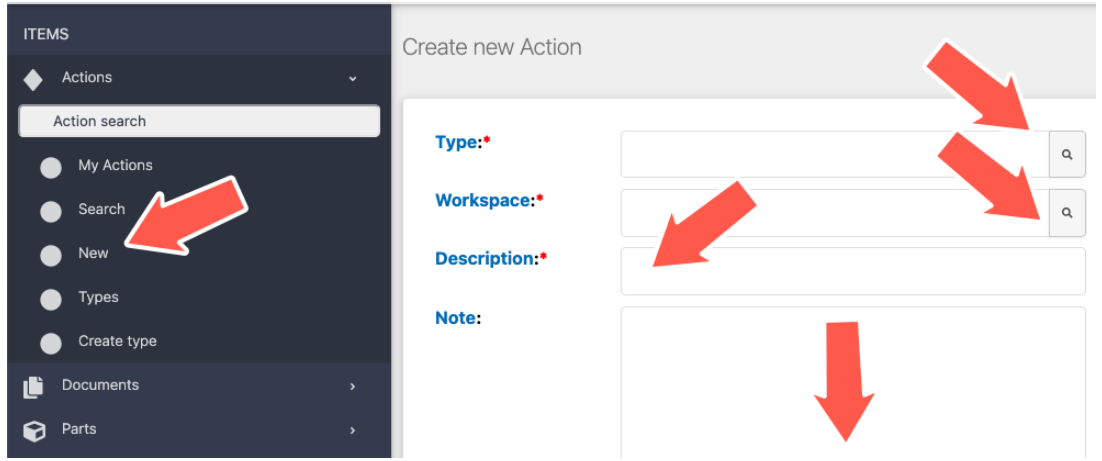
Digital management starts with PLM

Highstage

Using Action

- Create an Action ()
- Action Types
- Completing an Action (Assigning resources, progressing, completing)
- Searching for Actions.
- Parameters and Settings
- Mandatory fields forward
- Access and Permissions

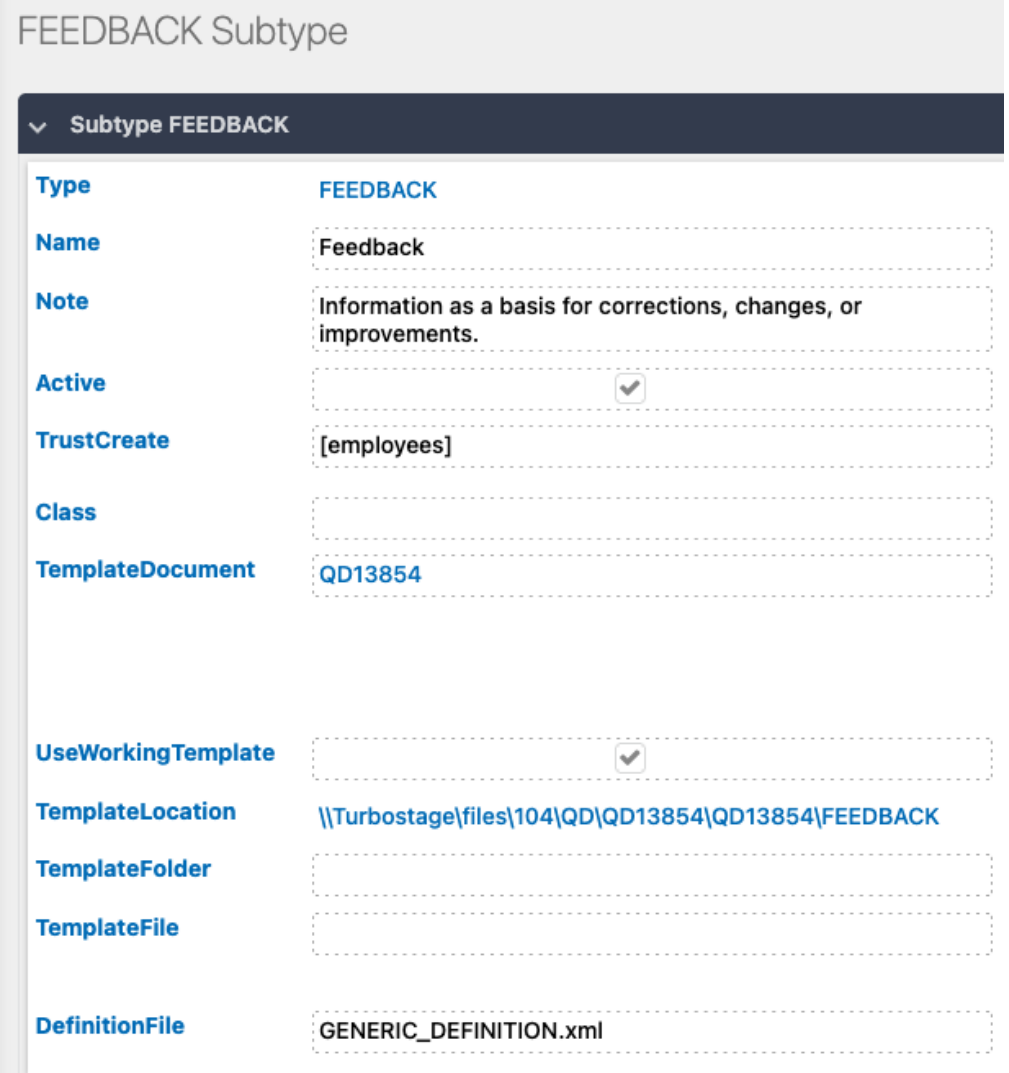
Create an Action



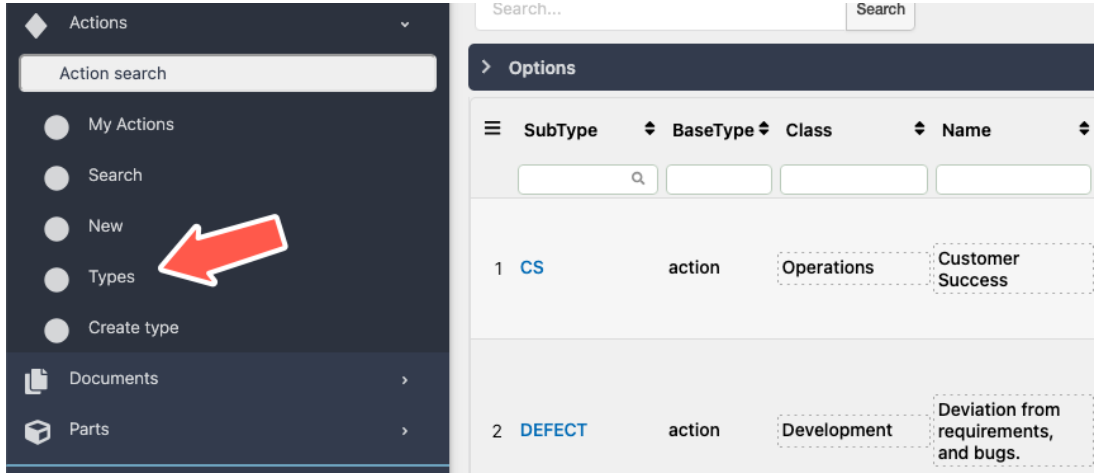
- Create new Action in menu
- Fill inn Type, Workspace and Description
- Click the Create button

- Alternatively, add sub-Actions where available

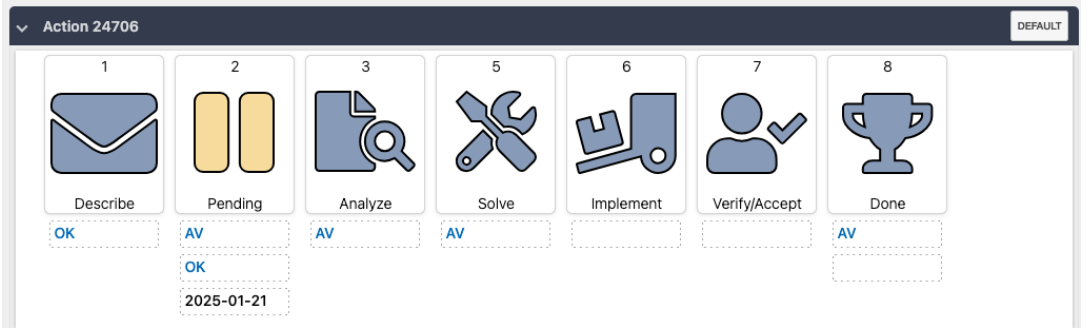
Action Types



- List of types in the same way as for documents or parts
- Similar functionality as for other item types
- Content of Action coded in XML schema



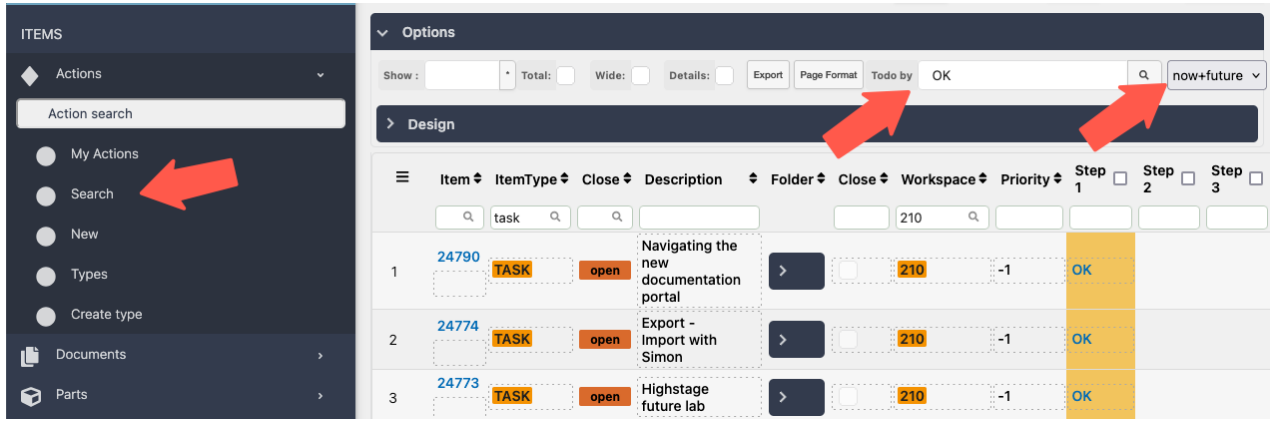
Completing an Action



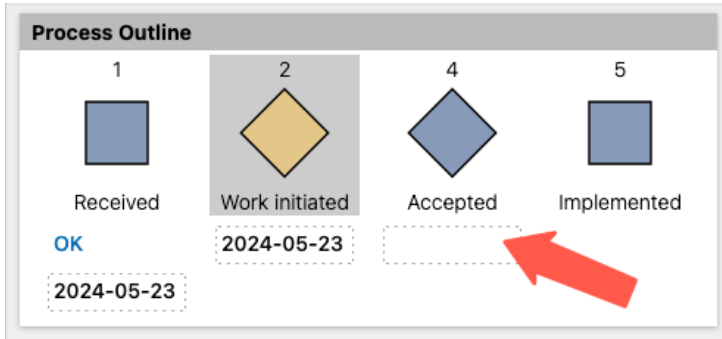
- Fill in info requested when the action opens
- Initial page may have header info in additional step info
- When Completing the step, progress by one of:
  - Click the Step to <Next step>
  - Click the step in the graphical representation
- When complete, do click Close

Searching for Actions

- Search works in the same manner as for Documents with some extensions
- Under options the search may be limited to
  - Who is engaged in the action
  - Time window for the actions, here shown open now and forward
- phases are listed with generic names
- To present specific phase names, use the Item type definition =<subtype>, in this case =task



Parameters and Settings



Action	JOB1109
Alias	
Description	Album on Pi
IsBillable	No
Note	
Workspace	GENERAL
Priority	-1
Note2	
Due date completed	
Notepad	

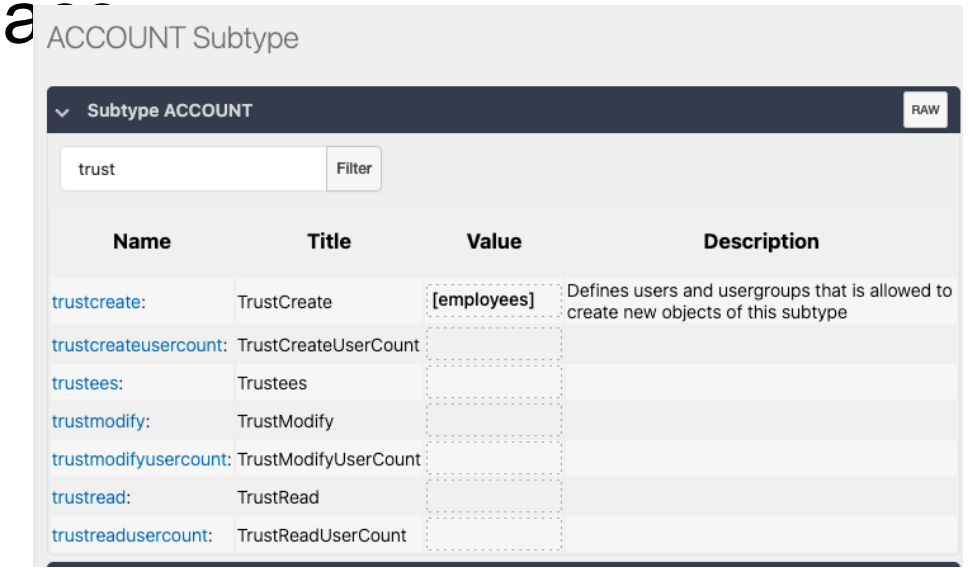
- Many of the parameters and settings from Doc applies
- The squares represent activities. Its date indicates when it was entered.
- Diamonds are milestones and user may define a date. Otherwise, it will be recorded when first visited.
- Other standard items may be defined in the header.

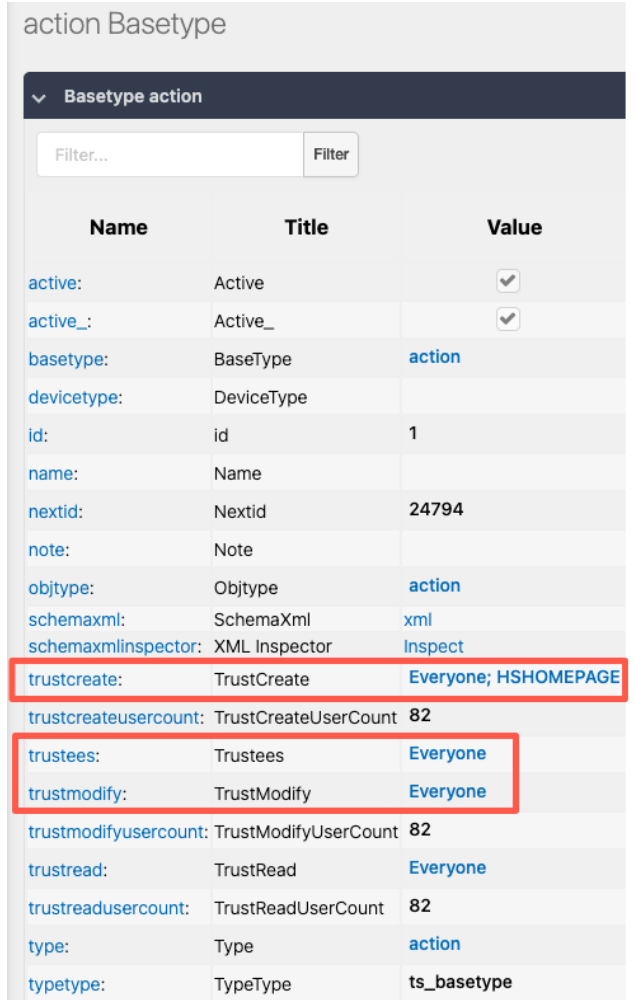
Mandatory fields forward

- Mandatory fields are marked with the red asterix *
- You may not close the action if there are any blank mandatory fields in current or any previous steps
- Workaround: Move back to latest step before first mandatory field and then close.

Access and Permissions

- Action access managed under Base types
- Subtype access managed in the same way as for Docs
- Data access managed through workspa





ONE
SIZE
NEVER
FITS
ALL

Highstage