

Action Module with examples

Digital management starts with PLM



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

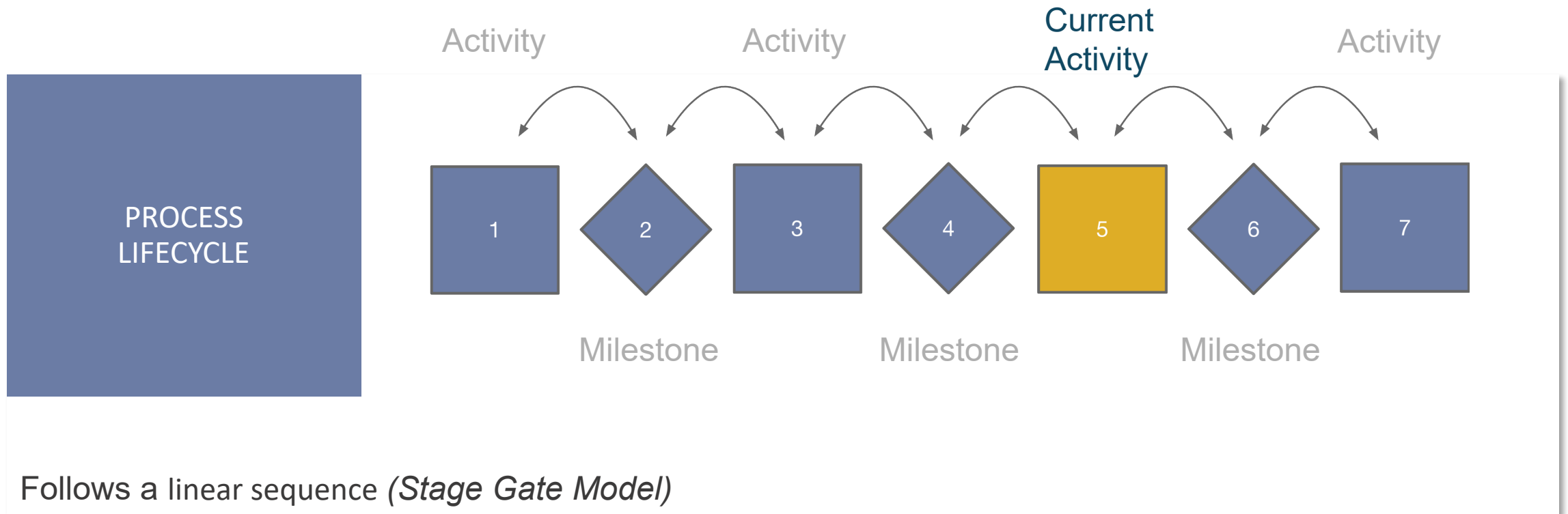


- Unlike Document, Part and Device modules the Action module can be used to **model any process** (*Change, Project, CAPA, Complaint etc.*)

Behavior overview

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

LINEAR SEQUENCE FOR ANY PROCESS



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

1

Review requirements

ENDRE.GAARD; ARVE.BADSVIK

2

Bid/No Bid

ARVE.BADSVIK

3

Tech Bid Preparation

ARNE.RODESEIKE

5

Prepare bid

6

Bid review

ARVE.BADSVIK

8

Bid submitted

9

Post-bid clarifications

10

Contract approval

ARVE.BADSVIK

11

Handover to project

12

Close

Stage gate

Review requirements

Customer response sent* ☐

Receipt to customer

Request for Quotation from Client

Step to Bid/No Bid

Bid/No Bid

Tech Bid Preparation

Prepare bid

Bid review

Bid submitted

Step

Handover to project

Close

Sales Manager [ARVE.BADSVIK](#)

Scope of Work

Info

To-do actions

Notepad log

Progress

Options

Checklists

Key documents

INFO:Governing and guidance documentation:

Sales process overview: [QMC005](#)

Sales process description: [QAP002](#)

Communication and profile instruction: [QAI011](#)

Customer feedback instruction: [QAI044](#)

Dwellop sales sign-off proxies: [QAI126](#)

Sales Process Raci: [QAI001](#)

Service Personnel Pricing Policy: [QAI121](#)

Sikring av Valuta: [QAI141](#)

Spare Part Pricing Policy: [QAI009](#)

Custom information. E.g procedure refs

Referenced by [0]

Reference [4]

PASTE SCOPE:TOP TREE-VIEW

Document [4]

	Item	File	Folder	Revs	Project Rev	Status	Acceptance Code	Title
1	QT0034-1	.docx (.pdf)	>			Approved		CT Tower
2	BIDPREP17545-1A	.docx	>			Working		CT Tower
3	RISKREG17543-1A	.xlsx	>			Working		CT Tower
4	PRECALC17542-1	.xls (.pdf)	>			Approved		CT Tower

Associated Emails & References

Full overview and control

Action search

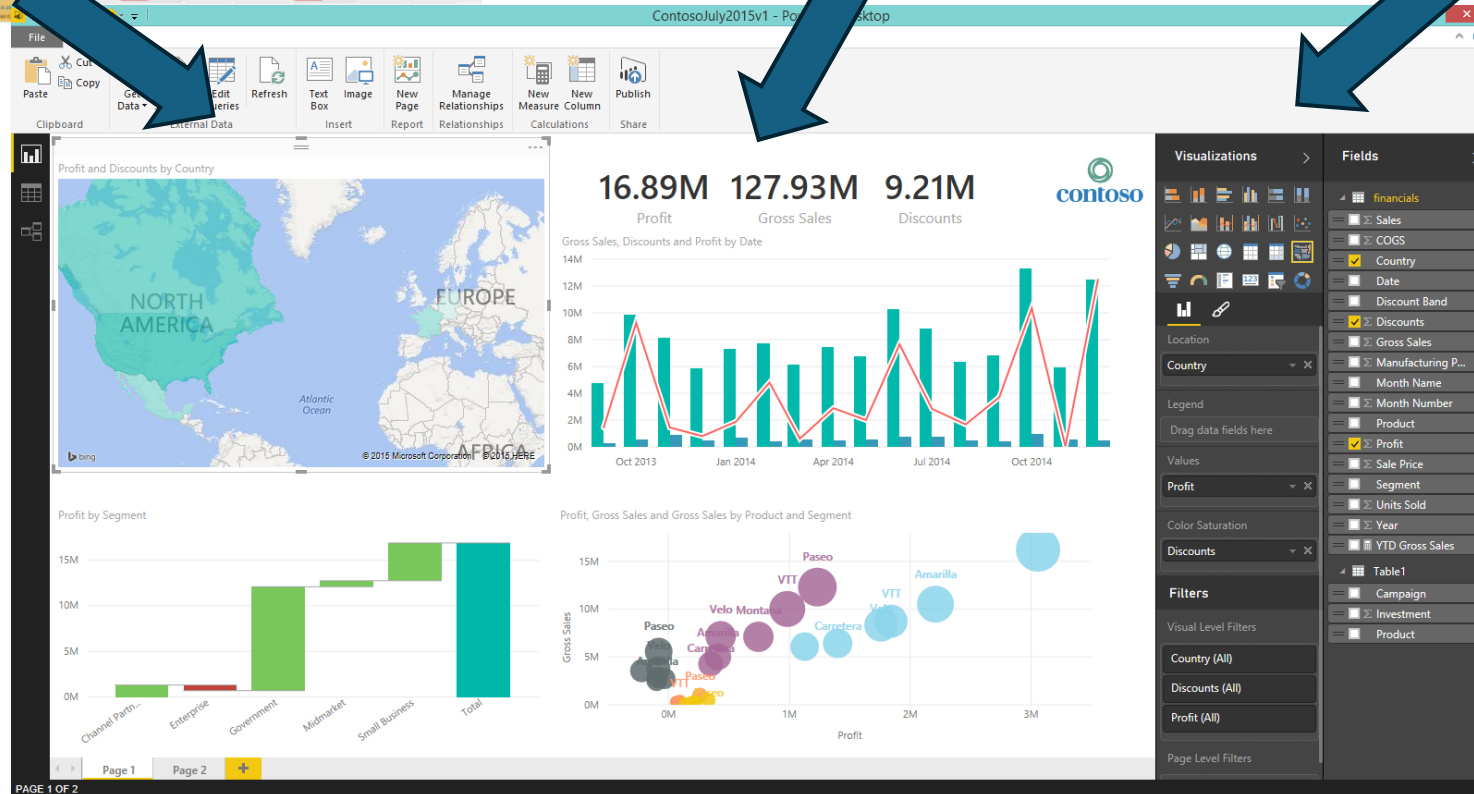
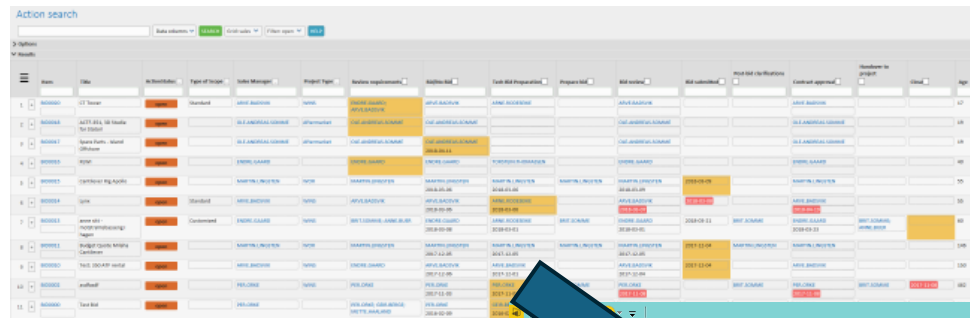
Data columns
Grid: sales

Options

Results

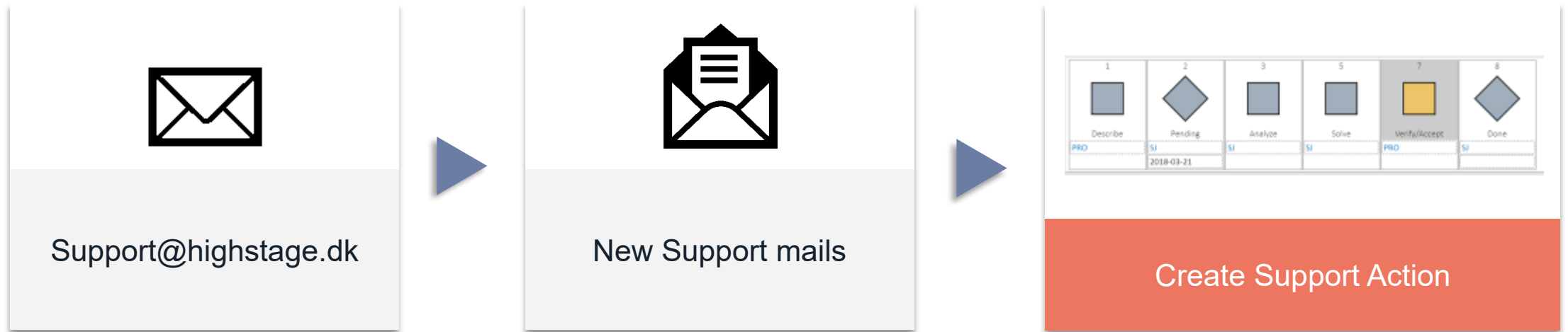
	Item	Title	ActionStatus	Type of Scope	Sales Manager	Project Type	Review requirements	Bid/No Bid	Tech Bid Preparation	Prepare bid	Bid review	Bid submitted	Post-bid clarifications	Contract approval	Handover to project	Close	Age
1	BID0020	CT Tower	open	Standard	ARVE.BADSVIK	WINS	ENDRE.GAARD; ARVE.BADSVIK	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	asdfsdf	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



Action create from mail

SUPPORT EXAMPLE



Create any number of Action processes with....

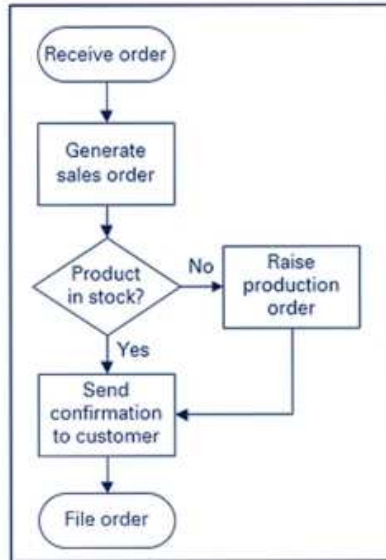
- Between 1 – 16 steps for each Action process
- Assign any number of select users to be responsible for completing each individual step with optional deadlines.
- Define whether any number of mandatory and/or optional Documents, Actions, Parts, Devices etc. should be created and completed in each individual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

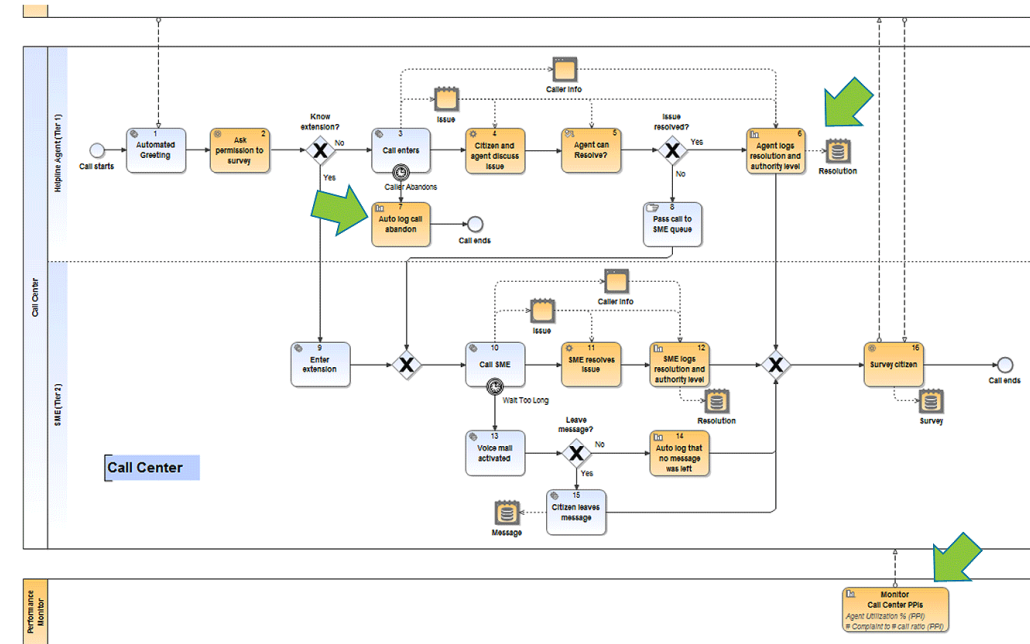


Other common and more complex models



Flowchart

- Decision branching
- Media
- Parallel paths



BPML Business Process Modelling Language

- Swim lanes
- Organization and technology sensitive

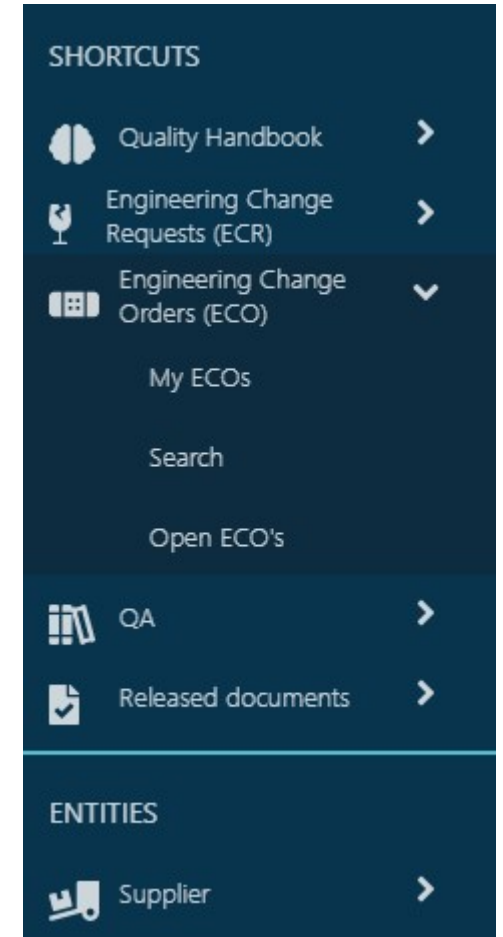
Action Module ECO examples

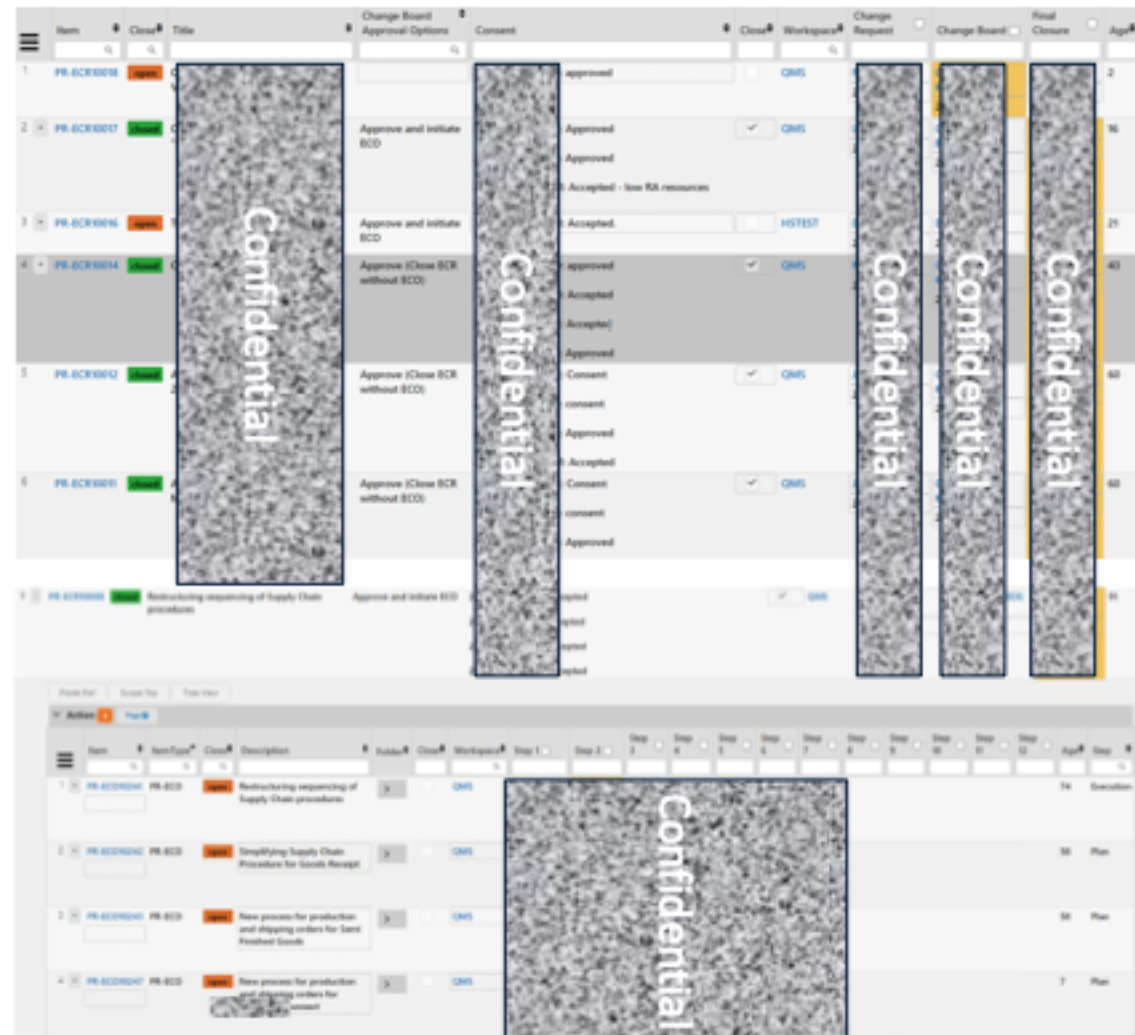
Digital management starts with PLM



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 – Product Defect





Process ECO sample

Process Outline

1	2	3	4	5	7
Plan	Execution	QA Approval	Regulatory Approvals	Implementation	QA Final Closure
2023-01-02	2023-03-02				

SOP regarding PR-ECO [SOP10033-6 Changes](#)

Step Properties

Plan

Action [PR-ECO10241](#)

Description Title* Restructuring sequencing of Supply Chain procedures

CreateDate 2023-01-02

CreateBy

Workspace QMS

ECO document* [Document/ECO](#) [\[N\]](#) [Create](#) [Add](#) [Page 02](#)

Execution Responsible*

Deadline for execution* 2023-03-31

> Execution

> QA Approval

> Regulatory Approvals

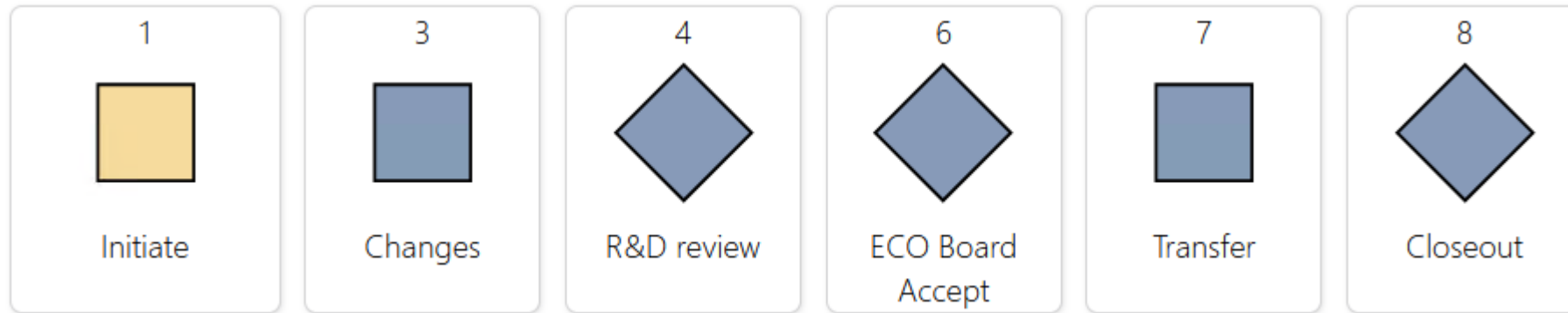
> Implementation

> QA Final Closure

Item	ItemType	Close	Description	Folder	Close	Workspace	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9
1	PR-ECO10247	PR-ECO	open	New process for production and shipping orders MyConnect		QMS									
2	PR-ECO10246	PR-ECO	open	Change of Brand Names - the word "Home" will be removed		QMS									
3	PR-ECO10245	PR-ECO	open	TEST ECR		HSTEST									
4	PR-ECO10243	PR-ECO	open	New process for production and shipping orders for Semi Finished Goods		QMS									
5	PR-ECO10242	PR-ECO	open	Simplifying Supply Chain Procedure for Goods Receipt		QMS									
6	PR-ECO10241	PR-ECO	open	Restructuring sequencing of Supply Chain procedures		QMS									
7	PR-ECO10240	PR-ECO	open			QMS									
8	PR-ECO10239	PR-ECO	closed	Update label for storage media with new REF number		QMS									

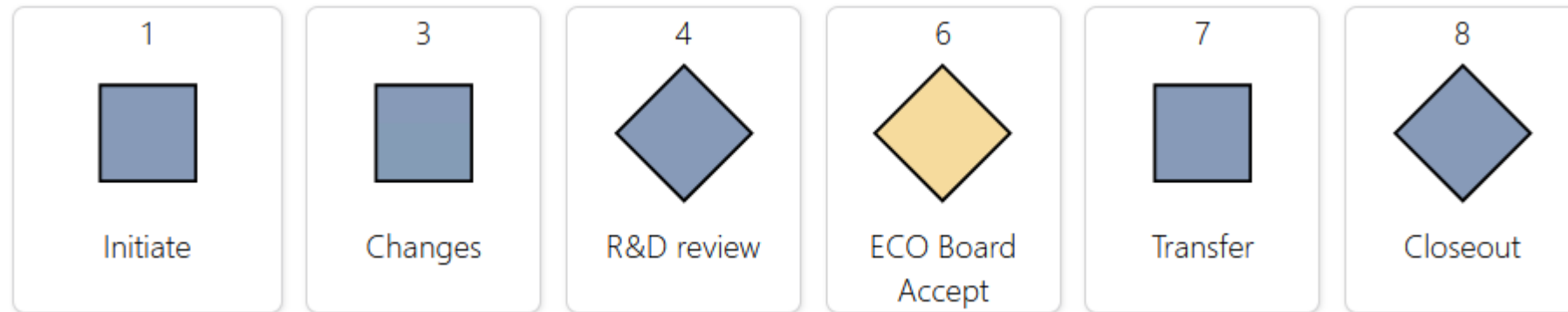
Confidential

Product ECO - Initiate – Start work



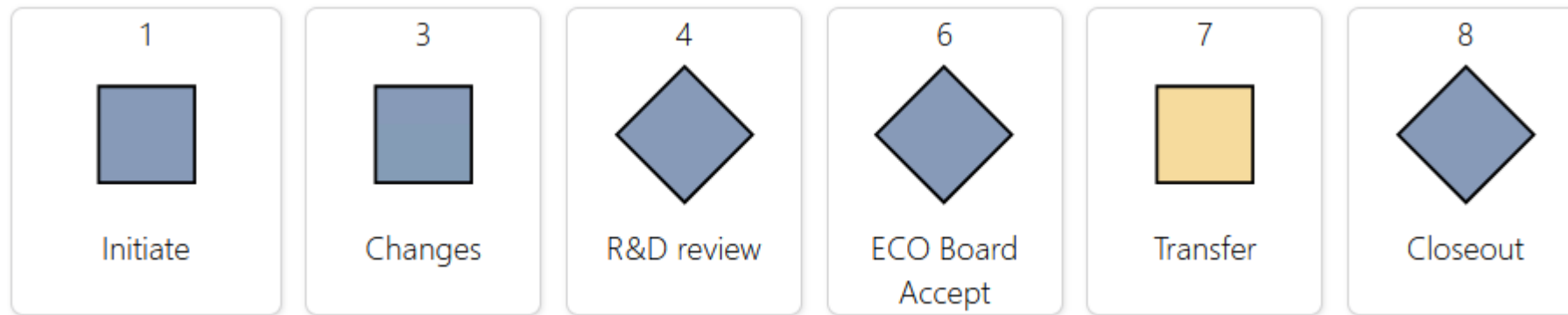
Item	Legacy ID	Status	Description	Note	Workspace	EventTime	LifeCycleStatus
2-1693		Working	S/N LABEL DETECTOR		Parts	2023-03-15	In Development
4-1972		Working	DETECTOR (MACHINING)		Parts	2023-03-15	In Development

Product ECO - Board Accept



Item ^	Legacy ID ^	Status ^	Description ^	Note ^	Workspace ^	EventTime ^	LifeCycleStatus ^
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2-1693-14		Approved	S/N LABEL DETECTOR		Parts	2023-03-15	In Development
4-1972-4		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		Approved	S/N LABEL DETECTOR		Parts	2023-03-15	In Production
4-1972-4		Approved	DETECTOR (MACHINING)		Parts	2023-03-15	In Production

- Transition to Transfer stage sets LifeCycleStatus

Action Module

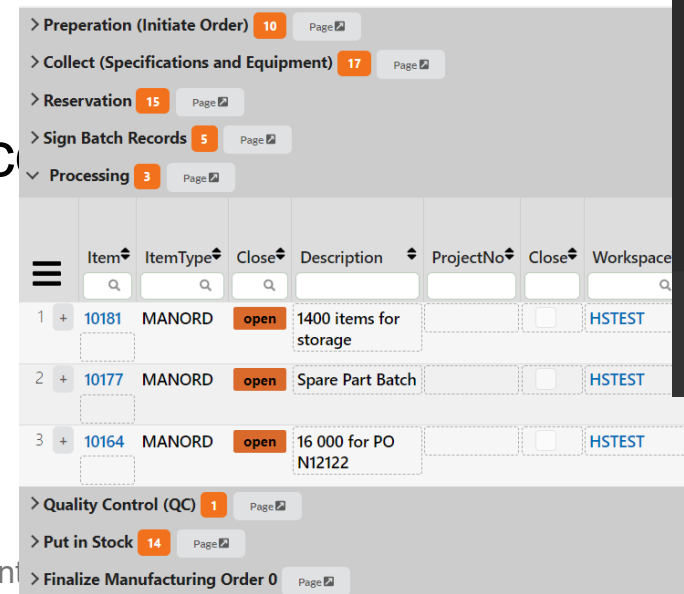
Manufacturing logistics and traceability examples (medtech)

Digital management starts with PLM



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

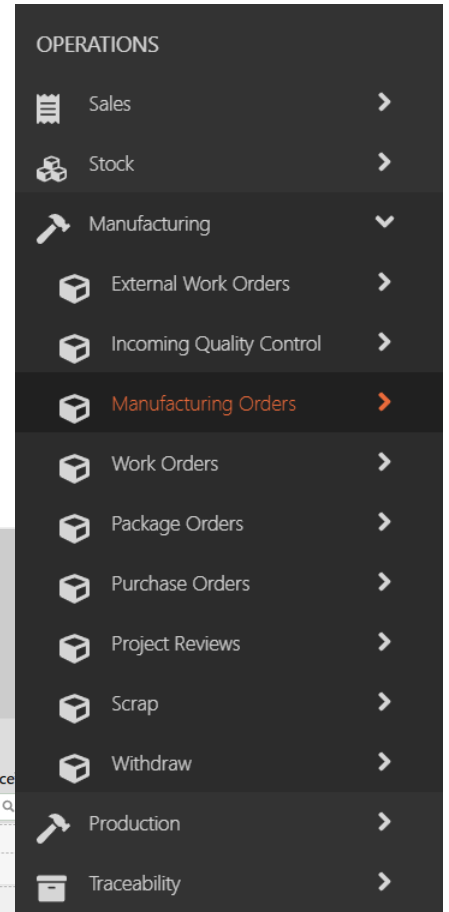


The screenshot displays a software interface for manufacturing management. It features a list of work orders with columns for Item, ItemType, Close, Description, ProjectNo, and Workspace. The work orders are numbered 1, 2, and 3, each with a status of 'open' and a description. The interface also shows a sidebar with various operations and a top navigation bar.

	Item	ItemType	Close	Description	ProjectNo	Workspace
1	10181	MANORD	open	1400 items for storage		HSTEST
2	10177	MANORD	open	Spare Part Batch		HSTEST
3	10164	MANORD	open	16 000 for PO N12122		HSTEST

Transitions shown in the interface:

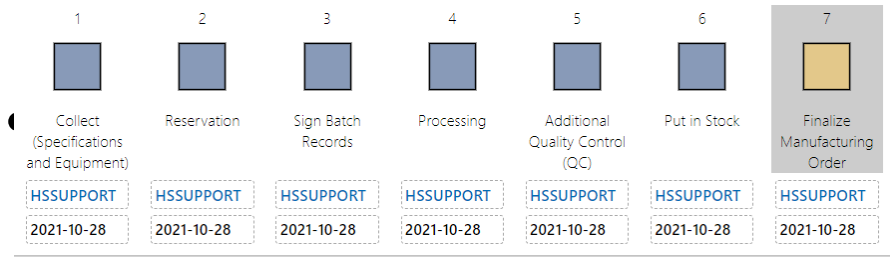
- > Preparation (Initiate Order) 10 Page
- > Collect (Specifications and Equipment) 17 Page
- > Reservation 15 Page
- > Sign Batch Records 5 Page
- > Processing 3 Page
- > Quality Control (QC) 1 Page
- > Put in Stock 14 Page
- > Finalize Manufacturing Order 0 Page



The screenshot displays a sidebar menu for manufacturing management. The menu is titled 'OPERATIONS' and lists various operations with icons and expand/collapse arrows. The 'Manufacturing Orders' item is highlighted in orange.

OPERATIONS	
Sales	>
Stock	>
Manufacturing	▼
External Work Orders	>
Incoming Quality Control	>
Manufacturing Orders	>
Work Orders	>
Package Orders	>
Purchase Orders	>
Project Reviews	>
Scrap	>
Withdraw	>
Production	>
Traceability	>

Manufacturing work orders (medtech)



Step Properties

> Collect (Specifications and Equipment)

> Reservation

> Sign Batch Records

Processing

ONGOING PRODUCTION: Step to Additional Quality Control (QC)
once production is completed

1 If this MANORD includes items with trays that needs location changed, add them here and specify the new location.

Scan trays

Device

> Device

2

Add

Page

State of a device
in case of non-consumable

Dirty

> Additional Quality Control (QC)

> Put in Stock

> Finalize Manufacturing Order

```
<step name="step2" title="Reservation" disabled="0">
<outline-xhtml name="default" src="ts/images/stage.svg"/>
<transition name="reserveFromStock" type="reserve"/>
<object name="Stocks" type="ts_stock" search-parameters="_columns=%2Bts_ref.qty;"/>
</step>

<step name="step4" title="Processing" disabled="0">
<outline-xhtml name="default" src="ts/images/stage.svg"/>
<transition name="add2st2ock" type="manufacture"/>

<step name="step6" title="Put in Stock" disabled="0">
<outline-xhtml name="default" src="ts/images/stage.svg"/>
<object name="Build" type="part" search-parameters="_columns=item%3BPartDisplayQC%3Bts%5Fref%2Eqty%3Bts%5Fref%2Eqty%5Fto%5Fstock">
<transition name="add243istock" type="stock"/>
<field name="ConfirmQCReports" title="Confirm Required Quality Control Performed" mandator="ConfirmQCReports">
</step>
```

Stock - Transaction History

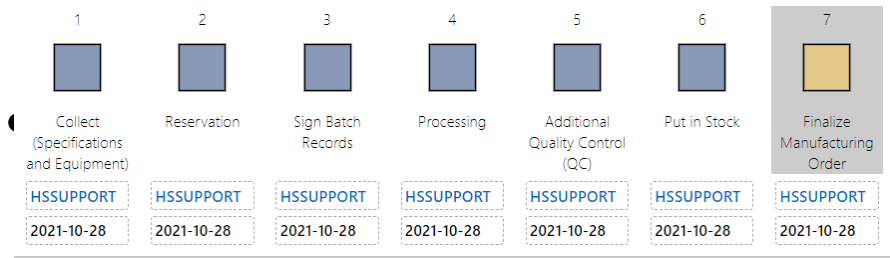
Options

Results

	action	Device	EventTime	Location	message	operation	Part	Quantity	State	Stock	UserId
1	10244	MLOT70	2021-10-28 15:25:07	10014	Added in stock	Stock	COMPMAT11681-1A	96	Stock	36934	HSSUPPORT
2	10244	BAT00641	2021-10-28 15:24:21	10003	Added 0 in stock	Added	ASSY11678-1A	0	Reserved	36933	HSSUPPORT
3	10244	BAT00641	2021-10-28 15:24:21	10003	Items have been Depleted	Depleted	ASSY11678-1A	0	Depleted	36933	HSSUPPORT
4	10244	BAT00641	2021-10-28 15:22:21	10003	Added 0 in stock	Added	ASSY11678-1A	0	Stock	36932	HSSUPPORT
5	10244	BAT00641	2021-10-28 15:22:21	10003	Items have been Depleted	Depleted	ASSY11678-1A	0	Depleted	36932	HSSUPPORT
6	10244	BAT00641	2021-10-28 15:22:21	10003	Added in stock	Reserved	ASSY11678-1A	1	Reserved	36933	HSSUPPORT
7	10243	BAT00641	2021-10-28 15:08:40	10017	Added in stock	Stock	ASSY11678-1A	1	Stock	36932	HSSUPPORT
8		BAT00640	2021-10-28 14:58:58	10020	Items have been depleted	depleted	ASSY11679-1A	1	depleted	36931	HSSUPPORT
9	10242	BAT00640	2021-10-28 14:58:58	10020	Removed 1 from stock	Removed	ASSY11679-1A	0	depleted	36931	HSSUPPORT
10		BAT00640	2021-10-28 14:58:58	10020	Items have been Depleted	Depleted	ASSY11679-1A	0	Depleted	36931	HSSUPPORT
11		BAT00640	2021-10-28 14:58:58	10020	Added 0 in stock	Added	ASSY11679-1A	0	depleted	36931	HSSUPPORT
12	10241	BAT00640	2021-10-28 14:35:16	10020	Added in stock	Stock	ASSY11679-1A	1	Stock	36931	HSSUPPORT

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 1												
	EventLog	EventTime	Severity	UserId	ObjType	Obj	ObjName	Field	Column	OldValue	NewValue	Message
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)

-	10083	CUSTORD	open	SW Test CUSTORD		<input type="checkbox"/>	HSTEST	-1	HSSUPPORT	PER	PER	PER																																																																																																																																													
									2020-08-30	2020-09-04	2020-09-04	2020-09-04																																																																																																																																													
<div>Paste Ref Scope:Top Tree-View</div> <div> <div>▼ Action 9 Page</div> <table> <tr> <th></th><th>Item</th><th>ItemType</th><th>Close</th><th>Description</th><th>ProjectNo</th><th>Close</th><th>Workspace</th><th>Priority</th><th>Step 1</th><th>Step 2</th><th>Step 3</th><th>Step 4</th><th></th></tr> <tr> <th></th><th>Q</th><th>Q</th><th>Q</th><th></th><th></th><th></th><th>Q</th><th></th><th></th><th></th><th></th><th></th><th></th></tr> <tr> <td>1</td><td>+ 10106</td><td>MANORD</td><td>open</td><td>SW Test CUSTORD</td><td></td><td><input type="checkbox"/></td><td>HSTEST</td><td>-1</td><td>PER</td><td>PER</td><td>PER</td><td></td><td></td></tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>2020-09-03</td><td>2020-09-03</td><td>2020-09-04</td><td></td><td></td></tr> <tr> <td>2</td><td>+ 10108</td><td>MANORD</td><td>open</td><td>SW Test MANORD from CUSTORD</td><td></td><td><input type="checkbox"/></td><td>HSTEST</td><td>-1</td><td>PER</td><td>PER</td><td></td><td></td><td></td></tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>2020-09-04</td><td>2020-09-04</td><td></td><td></td><td></td></tr> <tr> <td>3</td><td>+ 10110</td><td>MANORD</td><td>open</td><td>SW Test created from CUSTORD new</td><td></td><td><input type="checkbox"/></td><td>HSTEST</td><td>-1</td><td>PER</td><td>PER</td><td>PER</td><td></td><td></td></tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>2020-09-04</td><td>2020-09-04</td><td>2020-09-04</td><td></td><td></td></tr> <tr> <td>4</td><td>- 10051</td><td>WORKORD</td><td>open</td><td>Manual interface - mold tools</td><td></td><td><input type="checkbox"/></td><td>QUANTUMDX</td><td>-1</td><td>RASMUS</td><td></td><td></td><td></td><td></td></tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>2020-07-22</td><td></td><td></td><td></td><td></td></tr> </table> <div> <div>Paste Ref Scope:Top Tree-View</div> <div> <div>> Document 1 Page</div> <div>> Part 3 Page</div> </div> </div> </div>															Item	ItemType	Close	Description	ProjectNo	Close	Workspace	Priority	Step 1	Step 2	Step 3	Step 4			Q	Q	Q				Q							1	+ 10106	MANORD	open	SW Test CUSTORD		<input type="checkbox"/>	HSTEST	-1	PER	PER	PER												2020-09-03	2020-09-03	2020-09-04			2	+ 10108	MANORD	open	SW Test MANORD from CUSTORD		<input type="checkbox"/>	HSTEST	-1	PER	PER													2020-09-04	2020-09-04				3	+ 10110	MANORD	open	SW Test created from CUSTORD new		<input type="checkbox"/>	HSTEST	-1	PER	PER	PER												2020-09-04	2020-09-04	2020-09-04			4	- 10051	WORKORD	open	Manual interface - mold tools		<input type="checkbox"/>	QUANTUMDX	-1	RASMUS														2020-07-22				
	Item	ItemType	Close	Description	ProjectNo	Close	Workspace	Priority	Step 1	Step 2	Step 3	Step 4																																																																																																																																													
	Q	Q	Q				Q																																																																																																																																																		
1	+ 10106	MANORD	open	SW Test CUSTORD		<input type="checkbox"/>	HSTEST	-1	PER	PER	PER																																																																																																																																														
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									2020-09-04	2020-09-04																																																																																																																																															
3	+ 10110	MANORD	open	SW Test created from CUSTORD new		<input type="checkbox"/>	HSTEST	-1	PER	PER	PER																																																																																																																																														
									2020-09-04	2020-09-04	2020-09-04																																																																																																																																														
4	- 10051	WORKORD	open	Manual interface - mold tools		<input type="checkbox"/>	QUANTUMDX	-1	RASMUS																																																																																																																																																
									2020-07-22																																																																																																																																																

Digital management starts with PLM

Non-con to Scrap handling (medtech)

10102 Scrap for HSSUPPORT TEST

▼ Action 10102 default

Process Outline

1

2

3

Attach evidence

Select stock for Scrap

Finalize Scrap

HSSUPPORT

HSSUPPORT

HSSUPPORT

2020-09-03

2020-09-03

2020-09-03

Step Properties

▼ Attach evidence

Specified cause

Failed in QC

Non Conformity Report*

▼ Document/NCR [1] Create Add Page

	Item	File	Folder	Revs	Status	Description	Workspace	Author	Reviewer	Approver	EventTime	.Class	ItemType	.lock	.comment
1	NCR10589-1	.docx (.pdf)			Approved	Mock Audit, IVDeology	QUALITY	GERT; KIRSTINE	KIM; PIA	JOHN	2020-06-04		NCR	✓	

▼ Select stock for Scrap

Stock

> Stock [1] Add Page

Confirm selection of stock and quantity for Scrap*

> Finalize Scrap

Comments

> Comments

Properties and Options

Share With

CopyTo

Close

> Advanced

▼ Events and Rationale 4 Page

	EventLog	EventTime	Severity	UserId	ObjType	Obj	ObjName	Field
1		2020-09-03 12:01:28	INFO:0	Highstage Support	action	10102	10102	con
2		2020-09-03 12:01:12	INFO:0	Highstage Support	action	10102	10102	
3		2020-09-03 12:01:03	INFO:0	Highstage Support	action	10102	10102	
4		2020-09-03 12:00:58	INFO:0	Highstage Support	action	10102	10102	

Incoming quality control (medtech)

Process Outline

1

2

3

4

5

Step 1 - Receive

Step 2 - Critical Material

Step 3 - Additional Quality Control (QC)

Step 4 - IQC OK

Step 5 - Finalize IQC

HSSUPPORT

HSSUPPORT

HSSUPPORT

HSSUPPORT

HSSUPPORT

2021-08-17

2021-08-17

2021-08-17

2021-08-17

2021-08-17

Step Properties

> Step 1 - Receive

> Step 2 - Critical Material

> Step 3 - Additional Quality Control (QC)

< Step 4 - IQC OK

Please create or add each individual goods to be included in the IQC.

Assembly

Component (processed GRAN)

Processed Material

Granulate

Material (non-granulate)

Metal tray

Part/TRAYPART

> Part/ASSY [0]

Create

Add

Page 1

> Part/COMPGRAN [0]

Create

Add

Page 1

> Part/COMPMAT [0]

Create

Add

Page 1

> Part/GRAN [0]

Create

Add

Page 1

> Part/MAT [0]

Create

Add

Page 1

> Part/QMDT [0]

Create

Add

Page 1

> Part/TRAYPART [1]

Create

Add

Page 1

If this IQC includes items with trays that needs location changed, add them here and specify the new location.

Scan trays

Device

> Device [150]

Add

Page 1

New Location

< Step 5 - Finalize IQC

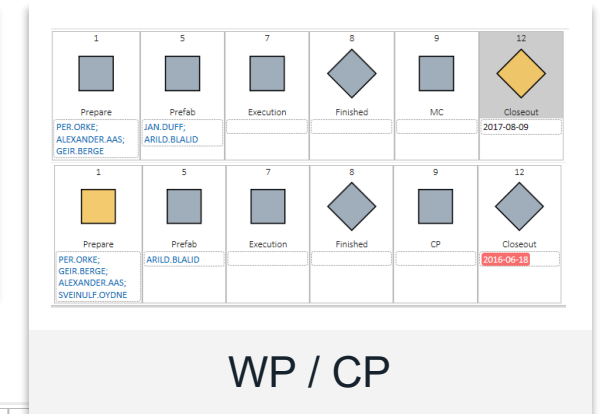
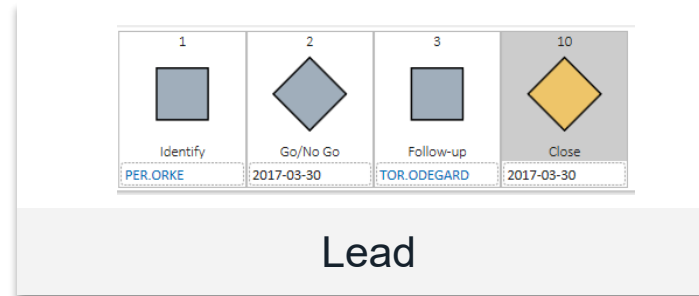
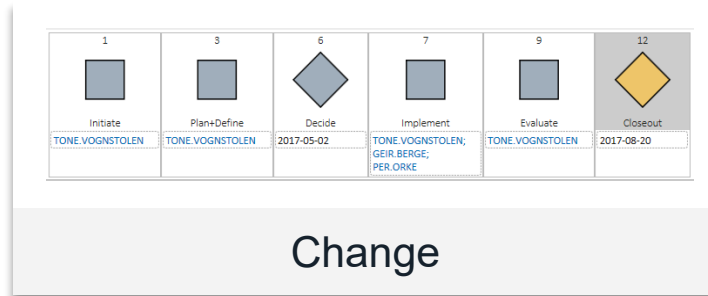
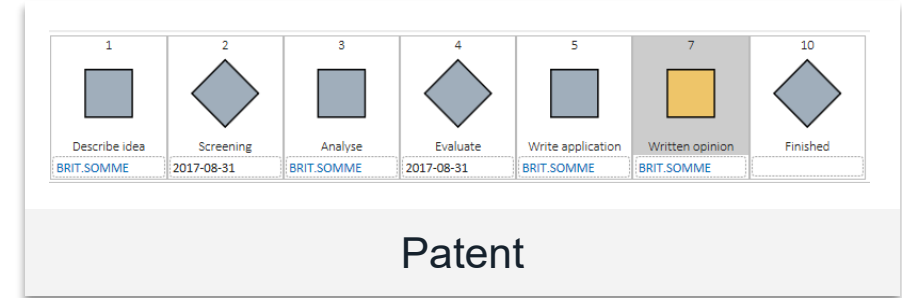
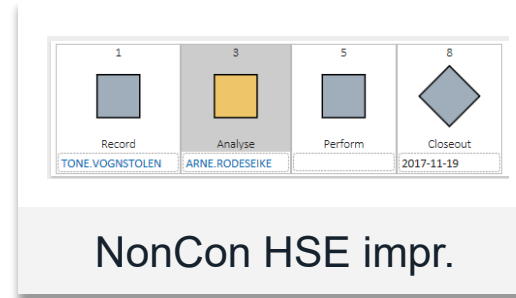
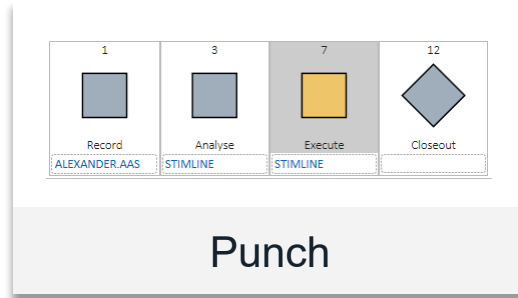
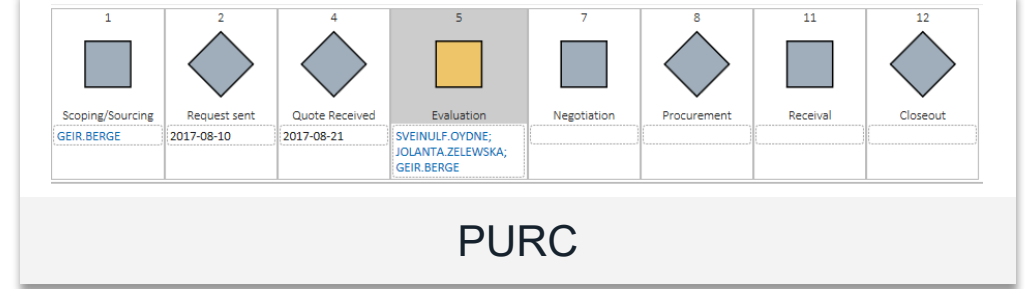
Digital management starts with PLM

Action Module Project management examples

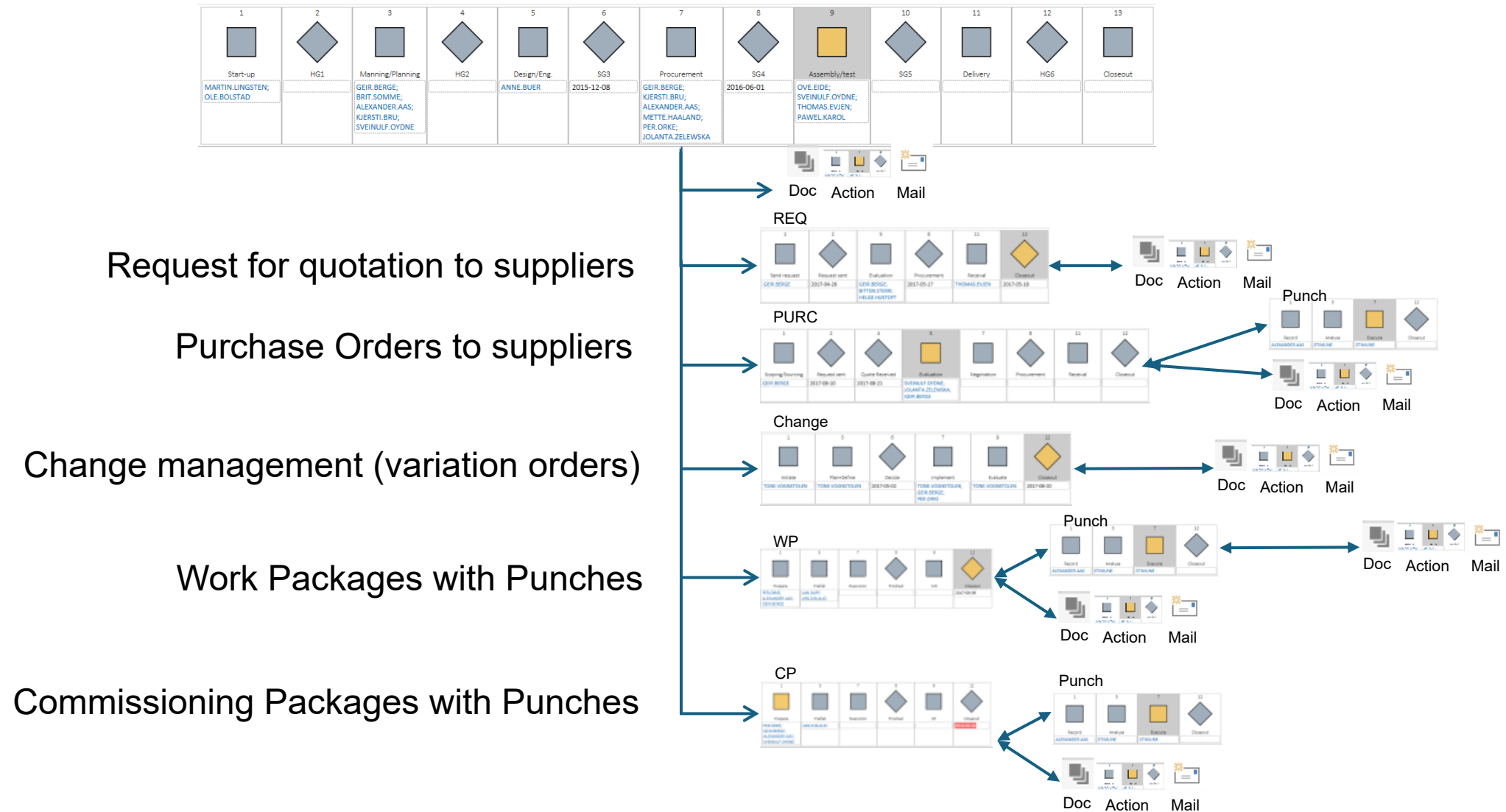
Digital management starts with PLM



Project man. example



Project man. customer example





Project man. customer example

Home

Refresh

Mail

Trace

Reset

Favorites

Search

Search

Per Reidar Ørke (PER.ØRKE)

User Level: AdminRead

Update Parts

Projects

Project Search

Search Projects

Search Packages

Search Sub-Projects

New Project

Search PURChases

Search REQuitions

Search PBOMs

PBOM Status

Search Purchasing docs

Project Reports

Service Menu

Supplier

Item	Title	Close	Project WBS	Parent Action	Project Type	Project class	PO/VO Number	Org unit	Step 1
1 +	PRO22429	open				0	4791629877		
2	PRO22428	open				4			
3 +	PRO22427	open				5			
4 +	PRO22426	open				4	4512204421		
5 +	PRO22425	open				4	4791502371		

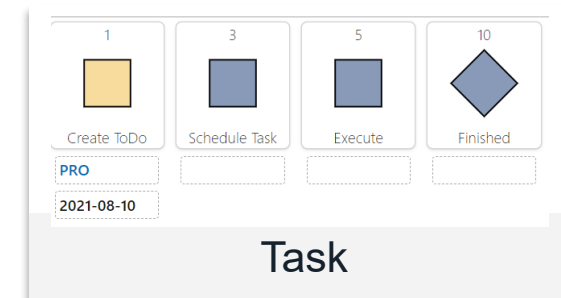
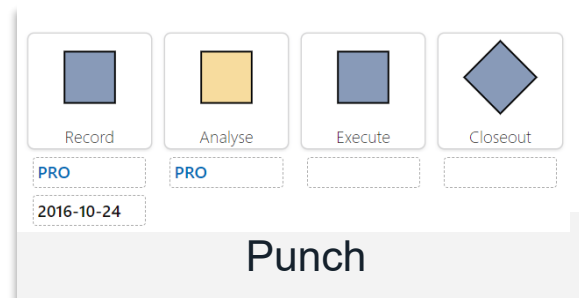
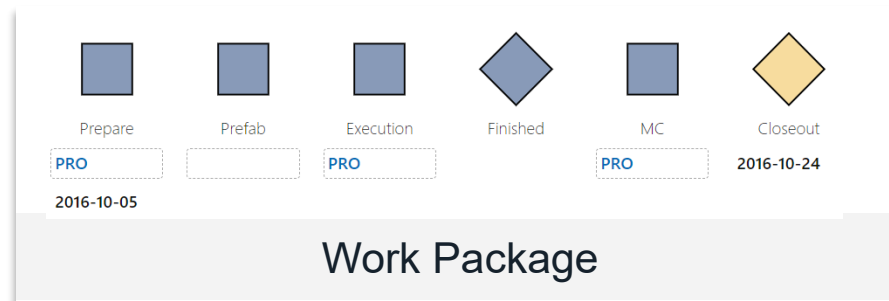
[illegible]

Action Module Delivery Project Example (internal demo server)

Digital management starts with PLM



Delivery project demo example



Digital management starts with PLM

Delivery project demo example

PRO-PROD10401 open PROSTAGE/HIGHFOLIO BOARD -1 PRO 2021-07-28 PRO PRO PRO; JS PRO 2021-11-26 PRO

Paste Reference Scope:Top Tree-View

▼ Action 2

Item	Close	Title	Workspace	Priority	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
1 PRO-DWWP10080	closed	First Dwellop project - Legg inn Dwellop schema	Demo	-1	PRO 2016-10-05						PRO		PRO			2016-10-24
2 PRO-DWWP10081	open	First Dwellop project - Legg inn Dwellop Data Eksempler	Demo	-1	PRO 2016-10-05											

Paste Reference Scope:Top Tree-View

▼ Action 3

Item	Close	Title	Workspace	Priority	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12
1 PRO-DWPUNCH10084	closed	Første billedpunch	Demo	-1	OK 2016-10-09											2016-10-09
2 PRO-DWPUNCH10088	open	Test manager	Demo	-1	PRO; RO 2016-10-24		OG									2016-10-24
3 PRO-DWPUNCH10089	open	with template files	Demo	-1	PRO 2016-10-24		PRO									

Paste Reference Scope:Top Tree-View

▼ Part 1

Item	File	Folder	PictureThumbnail	Revs	Status	Title	Deviceable	Workspace	Working	Freeze	Review	Approval	Approved	EventTime	ItemType	Cost
1 PRO-ASSY10020-1					Approved	WellCAM	✓	VIO	PRO			PRO		2015-12-08	ASSY	0

Using the Action Module

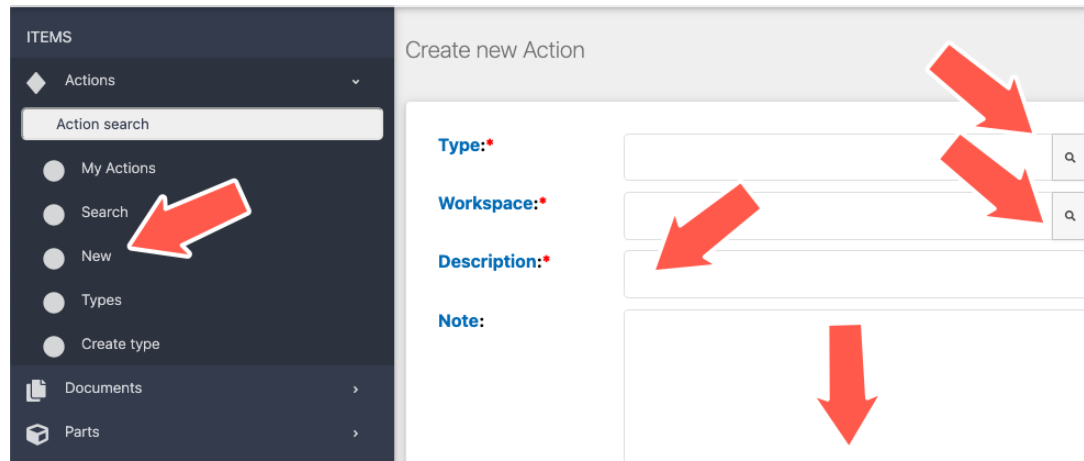
Digital management starts with PLM



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



The screenshot shows the 'Create new Action' form. On the left, the 'ITEMS' sidebar has a red arrow pointing to the 'New' option under the 'Actions' menu. The main form has a title bar 'Create new Action'. Below it, there are four input fields: 'Type:', 'Workspace:', 'Description:', and 'Note:'. Red arrows point to each of these fields. At the bottom right of the form, there is a 'Create' button, which is also indicated by a red arrow.

- Create new Action in menu
- Fill in Type, Workspace and Description
- Click the Create button
- Alternatively, add sub-Actions where available



The screenshot shows the 'Options' bar at the bottom of the interface. It contains a search bar with the text 'Unspecified General Task' and a dropdown menu showing 'Action/TASK [0]'. To the right of the search bar are three buttons: 'Create', 'Add', and 'Page'. A red arrow points to the 'Create' button.

Action Types

FEEDBACK Subtype

Subtype FEEDBACK

Type	FEEDBACK
Name	Feedback
Note	Information as a basis for corrections, changes, or improvements.
Active	<input checked="" type="checkbox"/>
TrustCreate	[employees]
Class	
TemplateDocument	QD13854
UseWorkingTemplate	<input checked="" type="checkbox"/>
TemplateLocation	\\Turbostage\files\104\QD\QD13854\QD13854\FEEDBACK
TemplateFolder	
TemplateFile	
DefinitionFile	GENERIC_DEFINITION.xml

- 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

Actions

Action search

- My Actions
- Search
- New
- Types
- Create type

Documents

Parts

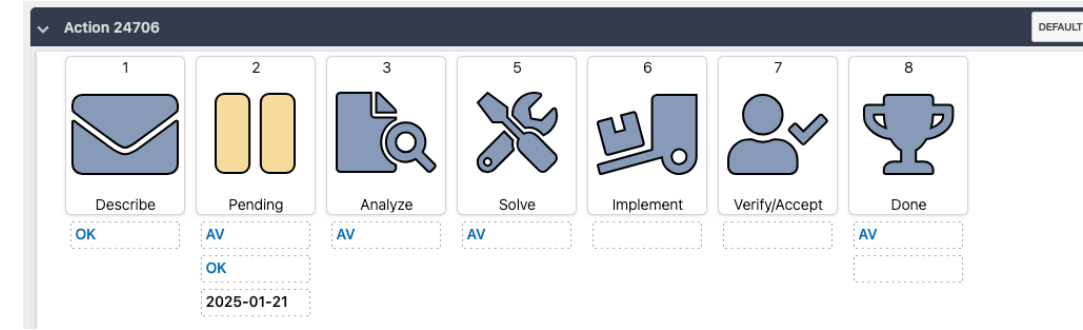
Search...

Search

Options

	SubType	BaseType	Class	Name
1	CS	action	Operations	Customer Success
2	DEFECT	action	Development	Deviation from requirements, and bugs.

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

Pending initiation of the request.

Responsible* AV

Note bother you wi

Step to Analyze

Properties and Options

Share With

CopyTo

Close

Modify Close

Close

Submit Cancel

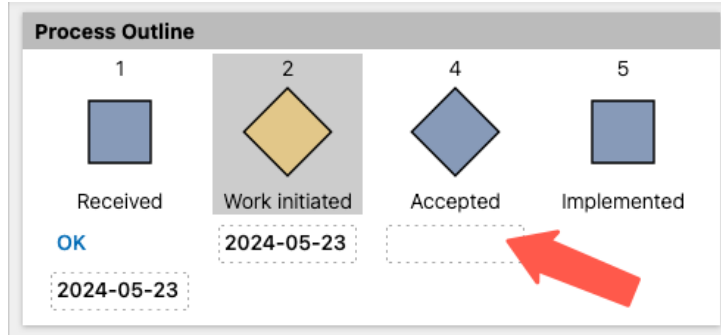
Searching for Actions

- 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

The screenshot displays a software interface for managing actions. On the left, a sidebar titled 'ITEMS' contains a 'Search' option, which is highlighted with a red arrow. The main panel, titled 'Options', shows a search bar with the text 'task' and a search button. A red arrow points to the search button. Below the search bar, a table lists tasks with columns for Item, ItemType, Close, Description, Folder, Close, Workspace, Priority, and Step. The table contains three rows of tasks, each with a 'TASK' subtype and an 'open' status. The first row is for item 24790, the second for 24774, and the third for 24773. Each row has a 'Close' button and a 'Workspace' field set to 210. The 'Priority' column shows -1 for all tasks. The 'Step' column has checkboxes for Step 1, Step 2, and Step 3, with Step 1 being checked for all tasks. The 'Description' column contains the following text: 'Navigating the new documentation portal', 'Export - Import with Simon', and 'Highstage future lab'.

Item	ItemType	Close	Description	Folder	Close	Workspace	Priority	Step 1	Step 2	Step 3
1 24790	TASK	open	Navigating the new documentation portal	>	210	-1	OK	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 24774	TASK	open	Export - Import with Simon	>	210	-1	OK	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 24773	TASK	open	Highstage future lab	>	210	-1	OK	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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



External Pricing	
Additional Scope	
Additional Scope Accepted	
Pricing (type)*	
Budget Accepted*	
Accepted Estimate (text)*	

- Mandatory fields are marked with the red asterisk *
- 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 workspace

ACCOUNT Subtype

Subtype ACCOUNT

trust Filter

Name	Title	Value	Description
trustcreate:	TrustCreate	[employees]	Defines users and usergroups that is allowed to create new objects of this subtype
trustcreateusercount:	TrustCreateUserCount		
trustees:	Trustees		
trustmodify:	TrustModify		
trustmodifyusercount:	TrustModifyUserCount		
trustread:	TrustRead		
trustreadusercount:	TrustReadUserCount		

action Basetype

Basetype action

Filter... Filter

Name	Title	Value
active:	Active	<input checked="" type="checkbox"/>
active_:	Active_	<input checked="" type="checkbox"/>
basetype:	BaseType	action
devicetype:	DeviceType	
id:	id	1
name:	Name	
nextid:	Nextid	24794
note:	Note	
objtype:	Objtype	action
schemaxml:	SchemaXml	xml
schemaxmlinspector:	XML Inspector	Inspect
trustcreate:	TrustCreate	Everyone; HSHOME PAGE
trustcreateusercount:	TrustCreateUserCount	82
trustees:	Trustees	Everyone
trustmodify:	TrustModify	Everyone
trustmodifyusercount:	TrustModifyUserCount	82
trustread:	TrustRead	Everyone
trustreadusercount:	TrustReadUserCount	82
type:	Type	action
typetype:	TypeType	ts_basetype

ONE
SIZE
NEVER
FITS
ALL

