

Product Information

On the following pages you can find detailed information about the new features and improvements in **BabtecQ Release 7.9**. You can expect the following highlights, among others:

New: Requirements Management

- The requirements from standards and laws as well as from demanding customers and increasingly complex products have changed over time and **multiplied in total**. These include requirements for quality, environmental or occupational health and safety management, IT security or product liability. Find out how Babtec software can now help you to keep an eye on all requirements.

Read more in chapter 2.2

Digital Checklists

- Are you already using the new digital Babtec checklists for commissioning, process sequences, assembly instructions, acceptances or shift handovers? Then get familiar with other new features right away: Define **branches** to control navigation through the checklist depending on the results recorded. Use the new **checklist sets** if several independent checklists are to be used for one activity. Or **link** checklists in the BabtecQ modules..

You can find out more about this and much more in chapters 2.3 and 2.4

Copy existing Measurement System Analysis (MSA)

- Because the professional execution of a MSA is often time-consuming, you would like to be able to reuse existing data if required. This is why it is now possible to use **a copy** of an existing PMFU when creating a new PMFU or to **import measured values** - from an existing Babtec PMFU, from a CSV or Q-DAS file.

Further details can be found in chapters 1.11.5 and 1.11.6

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1 News in BabtecQ (Windows Client)

With our software solutions, we consistently pursue the goal of providing the best possible support for the people in your company in all tasks relating to the quality assurance of your products and the daily challenges of quality management. That is why we are constantly developing our existing solutions, also taking your feedback into account.

In the following chapters you will learn more about new features in the BabtecQ modules that are available for you in the new release 7.9. We hope you enjoy reading and wish you new ideas for the use of our software solutions in your company.

1.1 News on operation

1.1.1 Release Information: Now available online

As soon as you log in for the first time after the software update, a message dialog about the new release opens. Click on "**Learn more now**" to go directly to the Babtec website, where you will find all the important information about the new 7.9 release. Simply select the **module or topic** that interests you and find out about the new features.

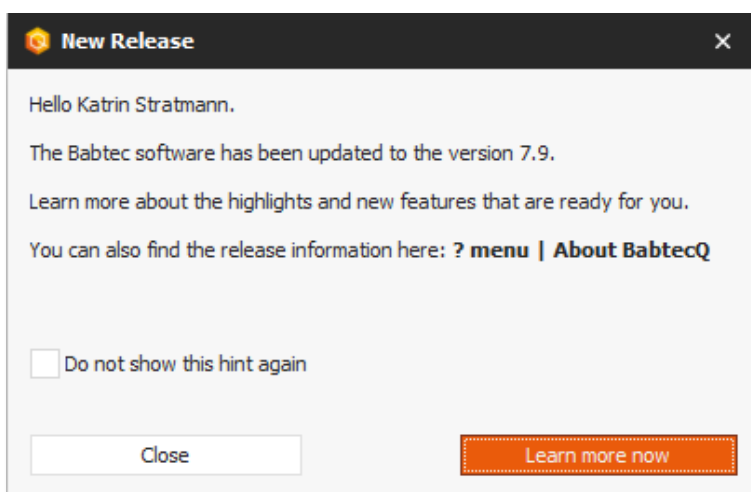


Fig.: Reference to the release information when logging in for the first time after the software update

If you no longer want this message to appear the next time you log in, simply activate the **option "Do not show this message again"**.

A hint:

New users who are added or imported in the Babtec user administration after the software update to the current version do not receive an automatic reference to the release information when they log in.

The link to the Babtec website with the release information can also be found at any time in the **?-menu** and there in the **dialog "About BabtecQ"**.

1.1.2 "Documents" tab: New module link for checklists

In most modules, not only files or links (URLs) to external information that are important in the context of the respective Babtec data record (e.g. complaint or action) can be stored here - information or data records from other modules can also be linked here.

As of version 7.9, you can now also link **fillable or already used and recorded checklists** that are in the context of the Babtec data set.

An example: You would like to regularly check whether your 8D process is effective based on processed customer complaints. To do this, you use a digital Babtec checklist, which you can then link to the complaint process in question as a verification document in the "Complaints" module.

Alternatively, it was already possible to link a **default document of the type "Checklist"** to the Babtec data record in question on the "Documents" tab (storage location "My documents"). From version 7.9, you can now use this default document to create a fillable checklist using the **new "Use checklist and link directly" function**. This new fillable checklist is then linked directly in the currently open document tab and is of course also available in the "Checklists" module.

Above all, however, the **checklist can be used immediately "without detours"** to carry out the upcoming activities. Simply double-click or use the familiar "View file contents" function to open the newly created checklist, log in to BabtecQ Go in the browser and off you go - provided you have the appropriate user rights for checklists.

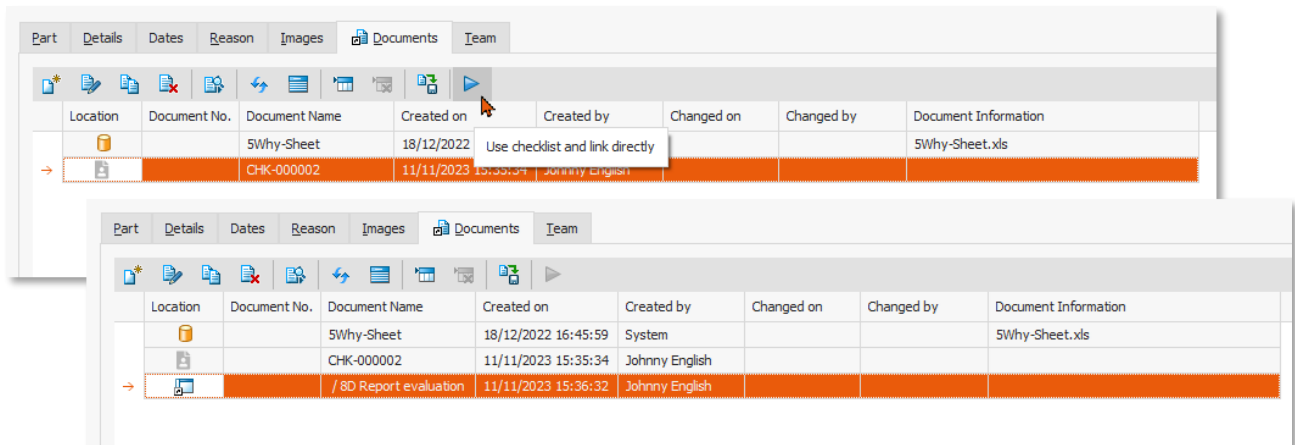


Fig.: "Documents" tab - New function (1) for creating the fillable checklist based on the checklist document and saving the module link in the same document tab (2)

Further information: **2.3 | Checklist**

1.1.3 "Documents" tab: New module link for training courses

In most modules, not only files or links (URLs) to external information that are important in the context of the respective Babtec data record (e.g. complaint or action) can be stored here - information or data records from other modules can also be linked here.

As of version 7.9, you can now also store data **records from the "Training courses"** module as module links that are in the context of the opened Babtec data record.

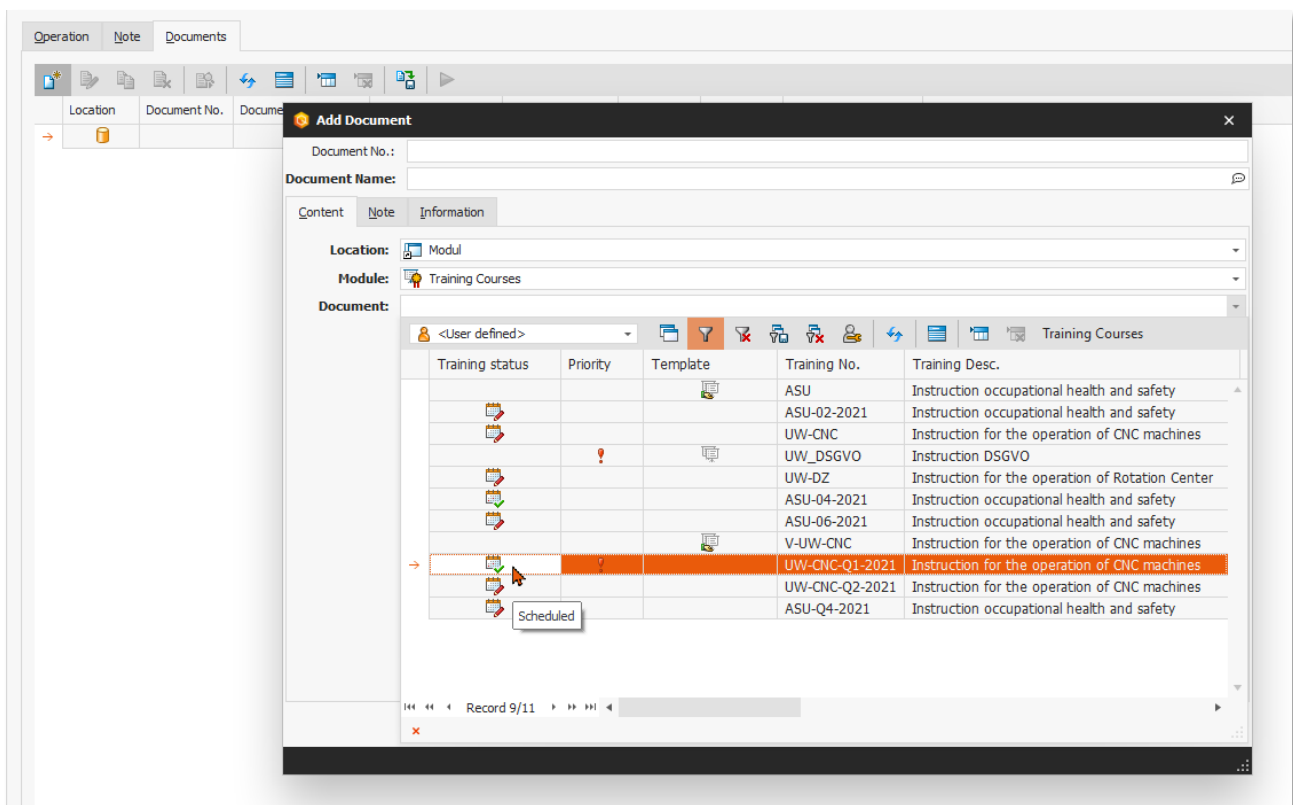


Fig.: "Documents" tab - New module link for training courses

1.1.4 Notes

In all note fields, you can now use the **new "Add link" function** to easily create a new clickable link and, above all, assign a suitable name to the (usually long and cryptic) URL. This [name](#) is then displayed in the text of the note as a clickable link.

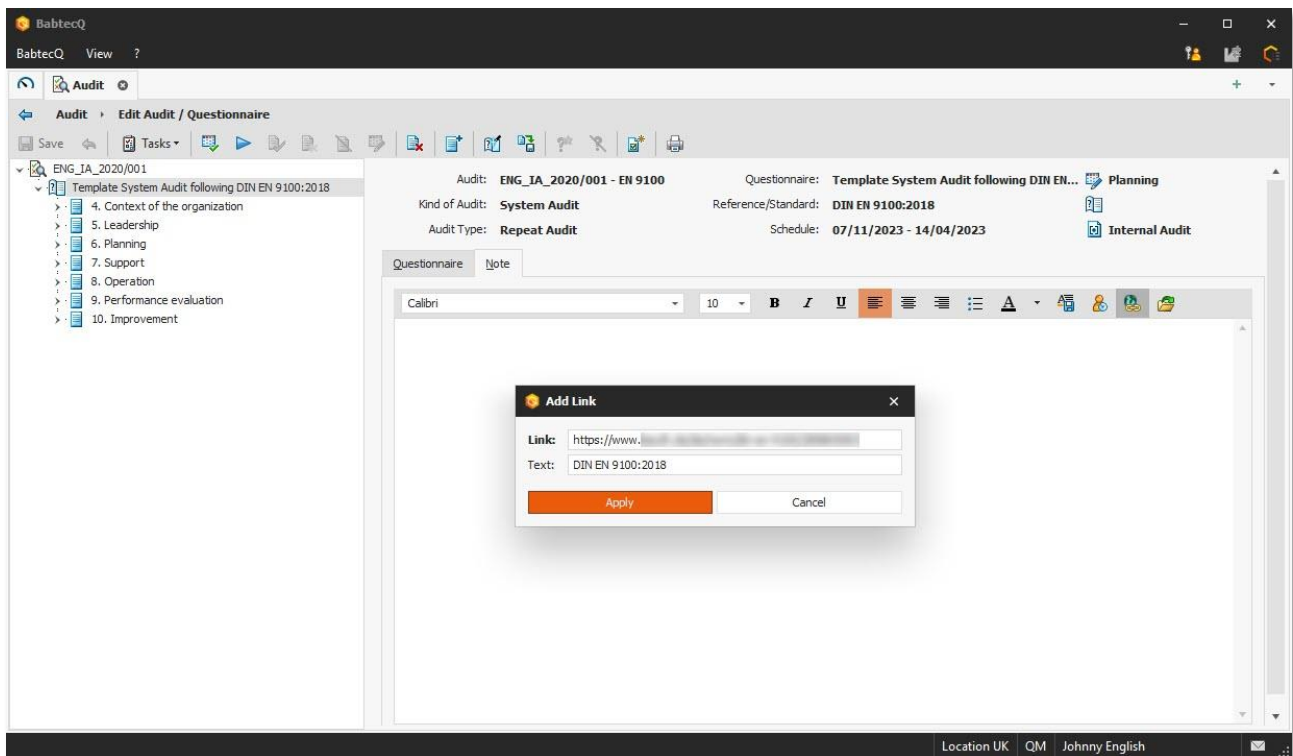


Fig.: New function for inserting links in note fields

1.1.5 Opening a data record with tree structure

Have you ever been annoyed by the fact that you have already clicked on an entry in the tree structure immediately after opening a complaint or an FMEA/CP workbook, for example, but the screen is then updated and you have "clicked on the wrong entry"?

This was due to the fact that a different toolbar than in the list view had to be loaded to edit a data record and the navigation path was also displayed above the toolbar. As of version 7.9, this no longer happens: when the data record is loaded, the space for the navigation path and the toolbar is "reserved" directly, so that "jumping" of the tree structure and the editing area is now avoided.

1.1.6 Status bar

The status bar at the bottom of the BabtecQ application displays information such as

- the Babtec instance used,
- the client and
- the name of the inspection station at which you have registered
- and your user name are displayed

Unlike before, this information is now always displayed in a fully legible manner.

1.2 Administration

Modules and catalogs are available here - for example user and rights management, localization profiles or system configuration, with which you can administer your BabtecQ system and define company-specific settings for the modules used. Find out here about the latest news and enhancements in this area.

1.2.1 Automatic numbering

In the various Babtec modules, you record and manage important data and information relating to the quality of your products and processes. This data is stored in the database as data records that are identified by a unique number. This means that in many modules you can only save a new data record if this number has been entered beforehand.

If you would like the identification number to be generated automatically in these modules and suggested in the relevant field, you can activate this automatic number assignment in the new "Automatic numbering" catalog.

The definition of automatic numbering is currently available for the following modules:

- APQP
- Audit
- Orders
- CAPA
- Part approval process
- FMEA / control plans (workbooks)
- Maintenance
- Employee qualifications
- Processes (BabtecQ Go)
- Gages
- Inspection Plans
- Complaints (BabtecQ and BabtecQ Go)
- Drawings

If a number preassigned by the activated automatic numbering has been subsequently changed when editing a data record, the uniqueness of the number is ensured by an inspection when the data record is saved.

Please note:

If your BabtecQ system is multi-client capable, the configuration and activation of automatic numbering is client-specific.

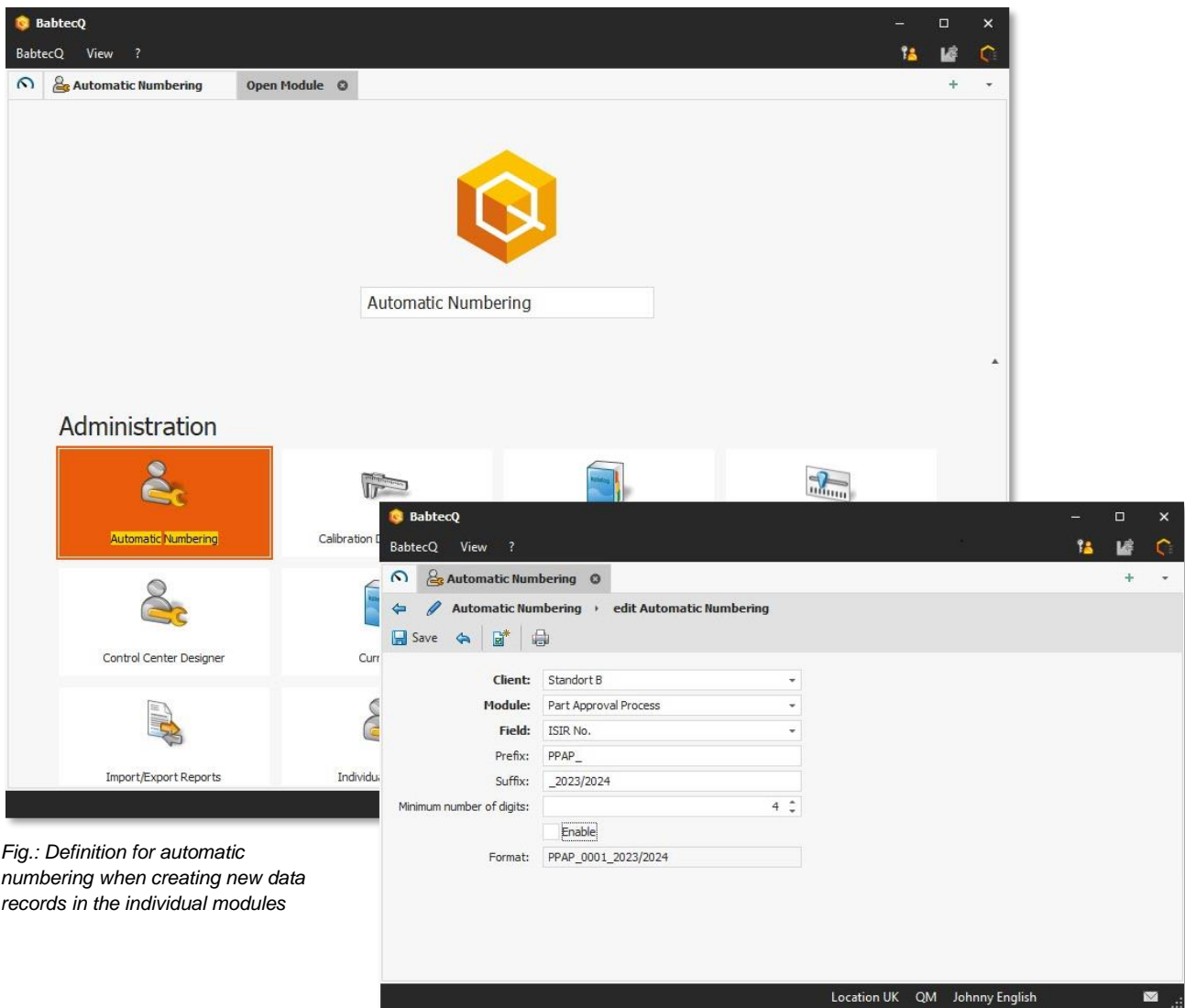


Fig.: Definition for automatic numbering when creating new data records in the individual modules

1.2.2 BabtecQ Client: Now as a 64-bit application

The BabtecQ client software was converted from a 32-bit to a 64-bit application with version 7.9.

Please note the **current system requirements**: The BabtecQ Client can now only be run on 64-bit operating systems.

1.2.3 Scheduled jobs

Notifications by e-mail, automatic data exchange between ERP systems and the Babtec software or the regular recalculation of Quality Cockpit key figures - these are just some of the important use cases for scheduled jobs that you appreciate as a Babtec user. This is because scheduled jobs generate useful information from data that supports you in the fulfillment of your activities.

However, a large number of such active jobs can put a considerable strain on system performance. This is particularly the case if several jobs search the database for relevant data at very short intervals. For this reason, the **repeat pattern "Every second"** is only available to a limited extent from version 7.9. For you, this means that if it is really necessary to repeat a scheduled job within seconds, please get in touch with your contact at Babtec, who will advise you and work with you to find a solution.

1.2.4 Global working time calendar

If you make **changes to the globally defined working time calendar**, you can use the **new note field** to record what was changed and, if necessary, why the change was necessary. This information can be helpful for other users - for example, if a decision has to be made in the APQP module for one or more projects as to whether the global working time calendar should be transferred to the project-specific ones or not.

In addition, the **"Details" tab** now shows who last edited the global working time calendar and when this change was made.

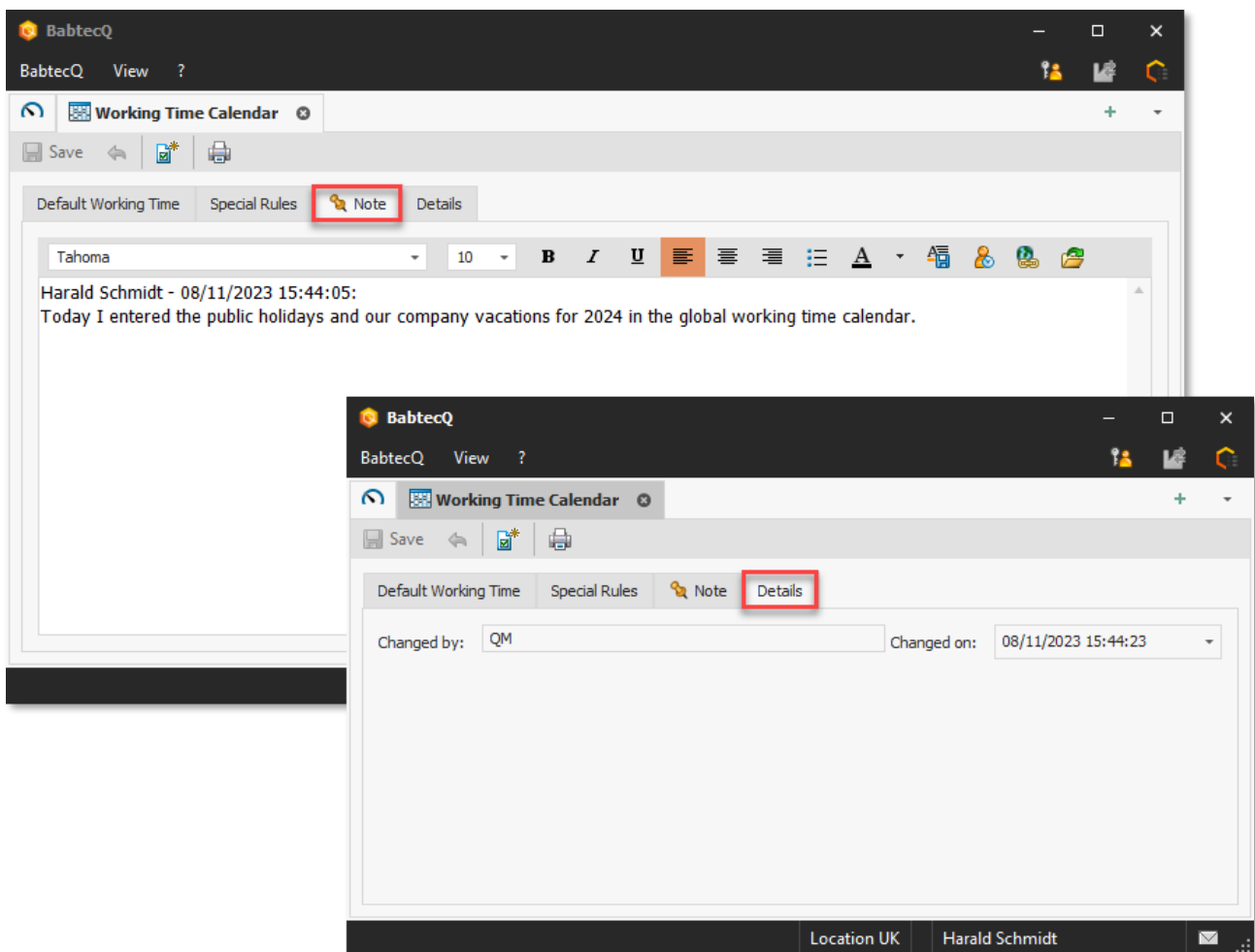


Fig.: Documenting changes in the global working time calendar

1.3 Dashboard

1.3.1 Dashboard designer: "View" and "View list" tiles

The views saved in the "Complaints" module in the "**Complaints (8D)**" list view could already be used as a "View" roof board tile or part of the "View list" tile. These saved views are now easier to recognize when configuring a tile, as they are now **marked accordingly**.

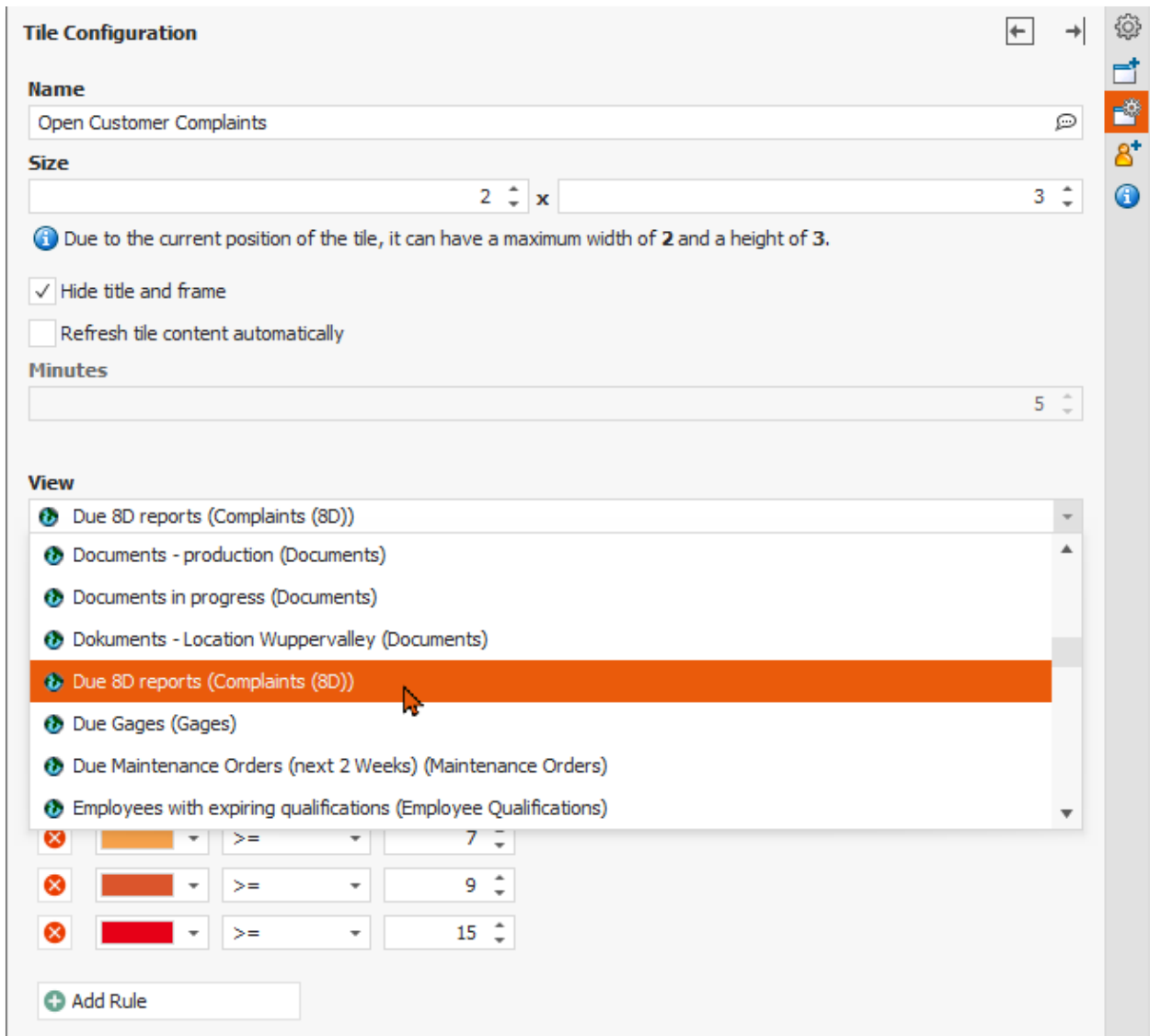


Fig.: Dashboard Designer - Selection of a saved view when configuring a tile

1.3.2 Dashboard Designer: "List view" tile for checklists

As of version 7.9.1, the **saved views** from the "Checklists" module can now also be used in the "List view" tile and used in your dashboards in both BabtecQ and BabtecQ Go.

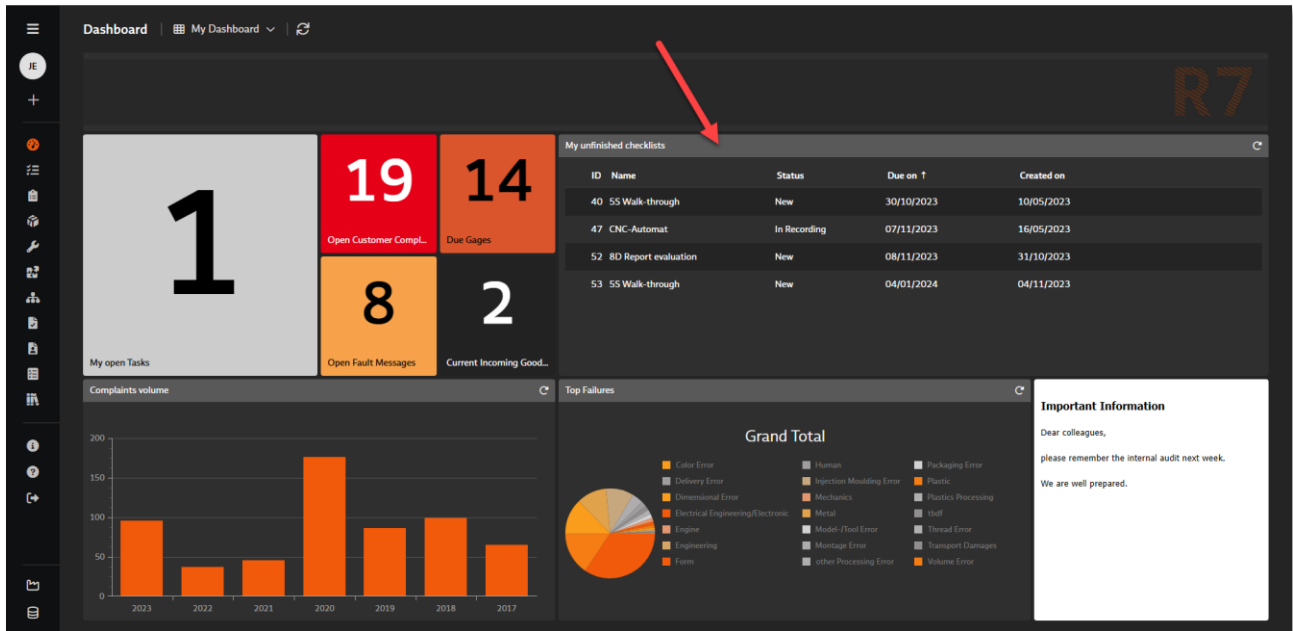


Fig.: Using a saved view for checklists in a tile for a dashboard in BabtecQ Go

1.3.3 Quality Cockpit: Key figures for checklists

In order to be well informed about the use of checklists in the future and to monitor the use of defined checklists in practice, you can use the following key figures from version 7.9:

- CL-001 for overdue checklists
- CL-002 for adherence to deadlines when processing checklists
- CL-003 for the average processing time of checklists
- CL-004 for the rate of canceled checklists

1.3.4 Quality Cockpit: Key figures for employee qualifications

From version 7.9, key figures are now also available for the "Employee qualifications" module, which you can provide in dashboards to keep track of the current status of existing qualifications:

- QFM-001 for missing qualifications
- QFM-002 for employees with missing qualifications
- QFM-003 for the proportion of required qualifications met
- QFM-004 for the proportion of employees with fulfilled required qualifications

1.4 APQP

In this module, you plan and monitor your development projects for new products (Advanced Product Quality Planning).

1.4.1 Working time calendar

If you have defined public holidays and company vacations in the **global working time calendar** ("Working time calendar" catalog in the "Administration" area), for example, you can easily transfer these special rules to the **specific working time calendars of selected projects and templates**.

The transfer is possible for all templates and also for projects that have not yet been completed or aborted.

During the update, **all calendar days "from tomorrow"** in the project-specific calendars are completely overwritten with the current global working time calendar. In addition to the project steps, the corresponding tasks are also updated. Please note that user rights are required to use this function.

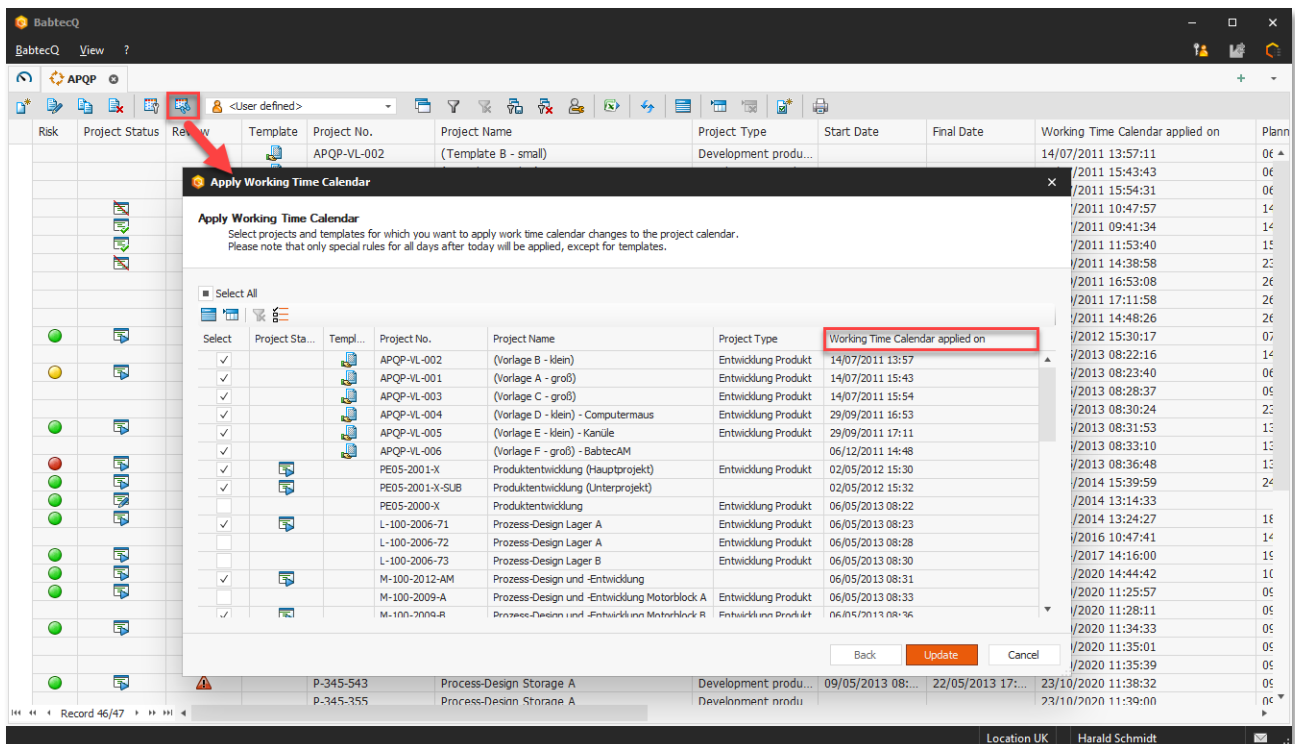


Fig.: Transfer current global working time calendar to projects and templates to update project-specific calendars

1.4.2 User-defined fields for project steps

With the "Edit project step" function, certain content can be edited or changed for **several selected project steps** at once. A new feature is that content in existing user-defined fields can now also be edited in this way.

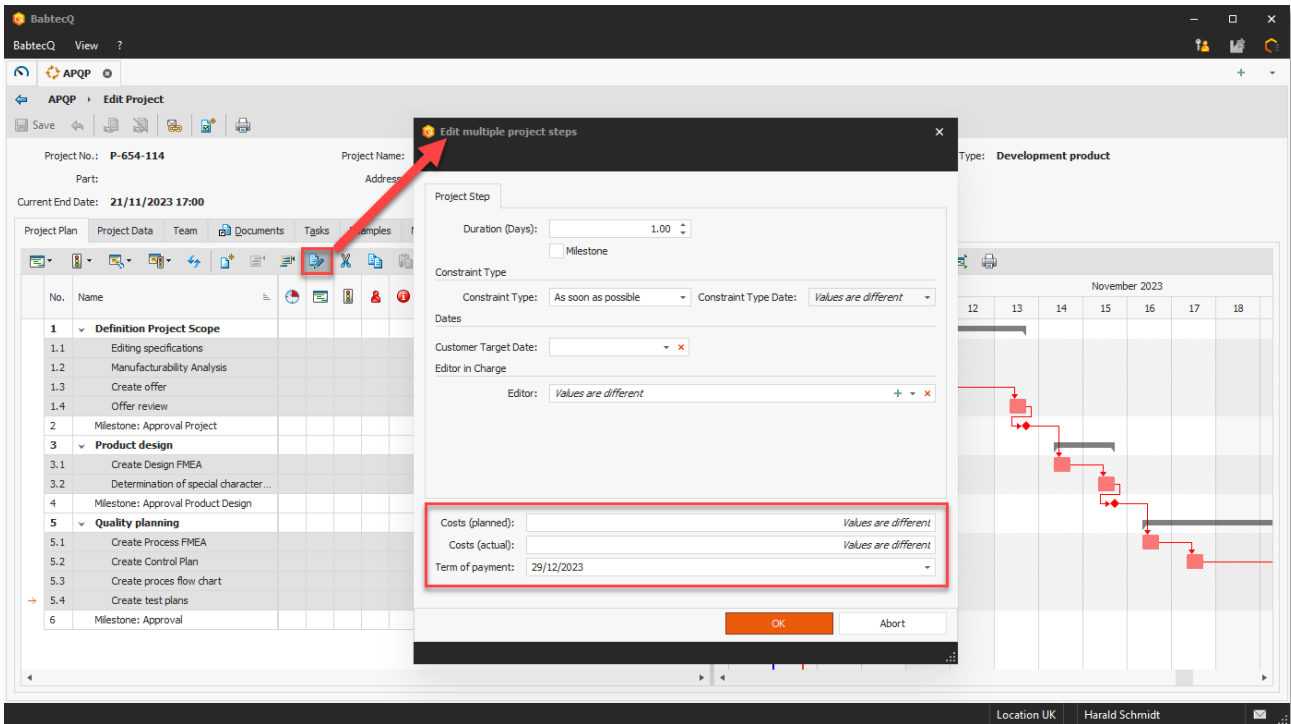


Fig.: User-defined fields when editing several selected project steps

1.5 Audit

1.5.1 Audit report: Formatting

In the "Audit report" and "Audit report (detailed)" reports, the **alignment of the field designations "Degree of fulfillment" and "Evaluation"** has been changed from right-aligned to left-aligned for reasons of uniformity.

BABTEC		Audit Report		Date:	10/30/2023
				Page:	1/1
Audit No.:	2023/009	Audit No.:	2023/009	Quality Auditor:	Senem Günerhan
Audit Name:	Audit Int. 009	Audit Name:	Audit Int. 009	Contact:	Nötzelmann, Björn
Kind of Audit:	Process Audit	Kind of Audit:	Process Audit	Rating:	VDA 6.3 (2023) - Process Audit (Base)
Audit Type:	Initial Audit	Audit Type:	Initial Audit	Address:	
Schedule:	10/30/2023 to:	Schedule:	10/30/2023 to: 10/30/2023		
Audit Subject:	2K-Injection Modling	Audit Subject:	2K-Injection Modling Hall 2		
Part:		Part:			
	Degree of Fulfillment (%): 96.00	Degree of Fulfillment (%):	96.00	Calculation:	Default Calculation
	Rating: quality capable	Rating:	quality capable		
Chapter					
No.	Chapter/Question	Evaluation	Degree of Fulfillment		
A	Development Phase				
P2	Project Management	quality capable			100.00
P3	Planning of product and production	quality capable			93.00

Fig.: Reports with affected field names - Left: Previous alignment, Right: Current alignment

1.6 Part Approval Process

1.6.1 Report "AIAG/4: Part Submission Warrant (PSW)"

This report is now multilingual and is therefore provided in a multilingual configured system in the language of the logged-in user.

1.6.2 VDA Volume 2, 6th edition: Parts bundling / product family

Chapter 7 - Special processes of the VDA guideline states under point 7.2: "Several variants of a product may be released in a joint PPF process. The details are to be agreed in the coordination of the PPF process."

It is therefore possible to specify additional products in the product family to which this part approval process relates in a part approval process in BabtecQ. The parts in question are selected from the part catalog in the "Part bundling/product family" area - the drawing data and external part information for which this (version of the) part approval process is valid can be taken from the part catalog or maintained individually.

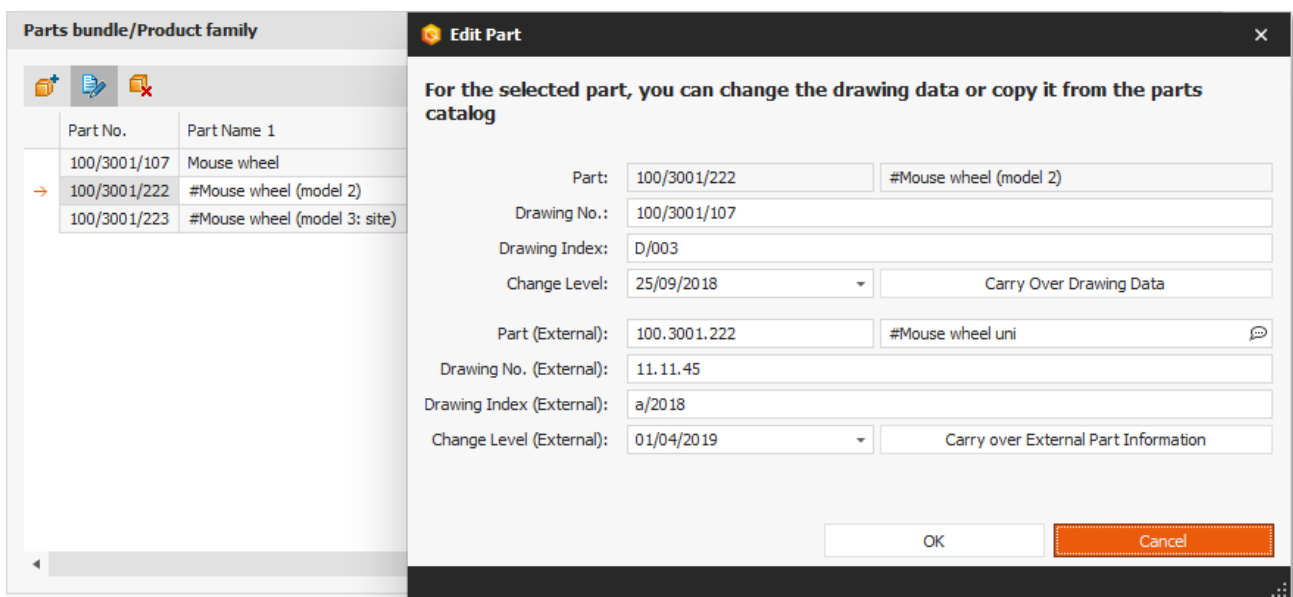


Fig.: "Parts bundling/product family" area of a VDA 2.6 part approval process - maintenance of the drawing data of an assigned part

1.6.3 VDA Volume 2, 6th edition: Czech language package

In version 7.9, the VDA-specific translations for the "Part approval processes" module have been revised and updated.

1.7 FMEA / Control Plans

1.7.1 New use of basic workbooks

Do your products and/or processes or your organizational structure or areas of responsibility require the use of basic workbooks to support the creation and maintenance of comprehensive design and/or process FMEAs and control plans as effectively as possible?

If so, version 7.9 offers you a **new alternative with an extended range of functions** for using or linking your created basic workbooks in your product-specific workbooks, both now and in the future. We would like to take this opportunity to introduce you to this new use of basic workbooks:

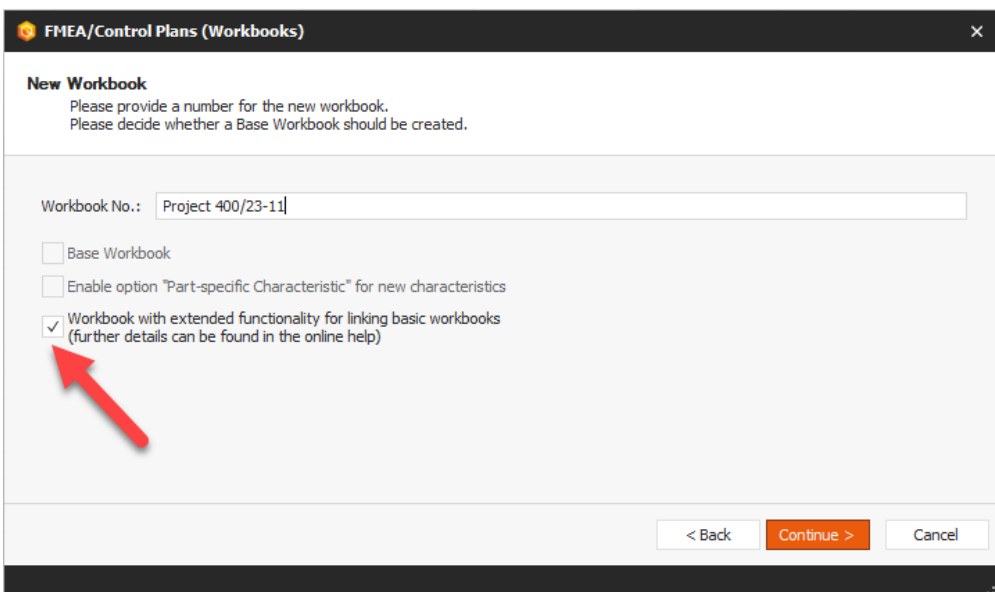
- [1.7.2 | Linking the base workbook](#)
- [1.7.3 | Update linked elements from basic workbooks](#)
- [1.7.4 | The new rules and benefits at a glance](#)
- [1.7.5 | Current restrictions with regard to the planned scope of services](#)

Darüber hinaus finden Sie weitere ausführliche Informationen in der aktuellen Online-Hilfe.

You can also find more detailed information in the current online help.

Please note that the new use of basic workbooks will be further developed for you in the coming versions and that you will therefore currently still have to deal with some "limitations" with regard to the planned scope of services. However, we would be delighted if you recognize the potential for yourself and start using it today. As always, we look forward to your feedback. Thank you very much in advance. 😊

The decision is now up to you: When creating a new workbook, you specify whether this workbook already supports the new range of functions with regard to linked basic workbooks or whether you want to continue working with the previous range of functions from version 7.8 for the time being. You make the decision by activating or not activating the option "**Workbook with extended functionality for linking basic workbooks**".



The screenshot shows a dialog box titled "FMEA/Control Plans (Workbooks)" with a "New Workbook" section. It contains a text input field for "Workbook No." with the value "Project 400/23-11". Below this are three checkboxes: "Base Workbook" (unchecked), "Enable option 'Part-specific Characteristic' for new characteristics" (unchecked), and "Workbook with extended functionality for linking basic workbooks (further details can be found in the online help)" (checked). A red arrow points to the checked checkbox. At the bottom, there are three buttons: "< Back", "Continue >" (highlighted in orange), and "Cancel".

Fig.: Dialog when creating a new workbook - option for using the new scope of functions when using basic workbooks

1.7.2 Linking the base workbook

If you activated the option "Workbook with extended functionality for linking basic workbooks" when creating the workbook, you will find the new function call "Link / update basic workbook" in the system and process structure for a system or process element.

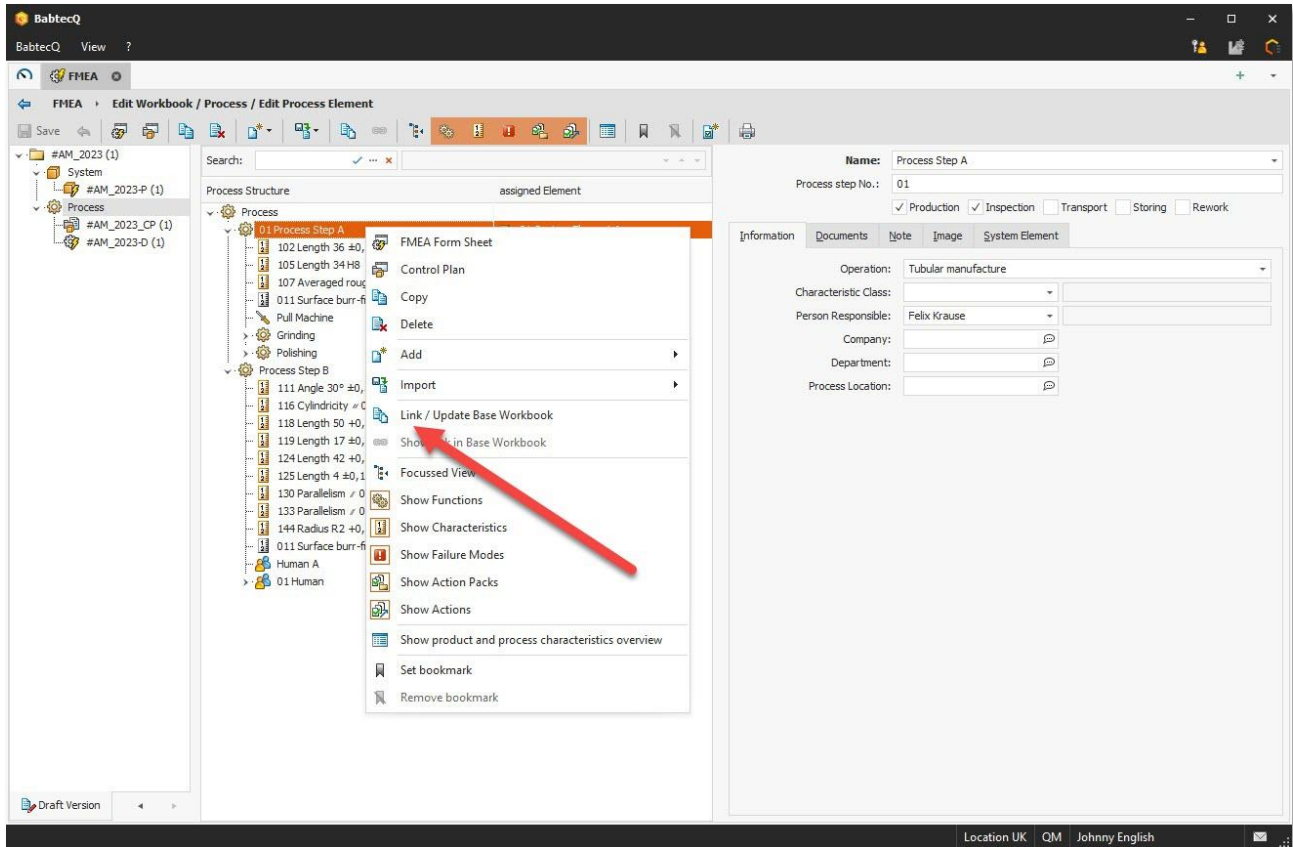


Fig.: New function call "Link / update base workbook", here at process element level

A new wizard then guides you step by step through the linking process.

1. Select the base workbook from which you want to use elements in your workbook

In the wizard, both the system and process structure of the selected basic workbook are displayed in the middle area. In the right-hand area, you can see the system and process structure of your open workbook.

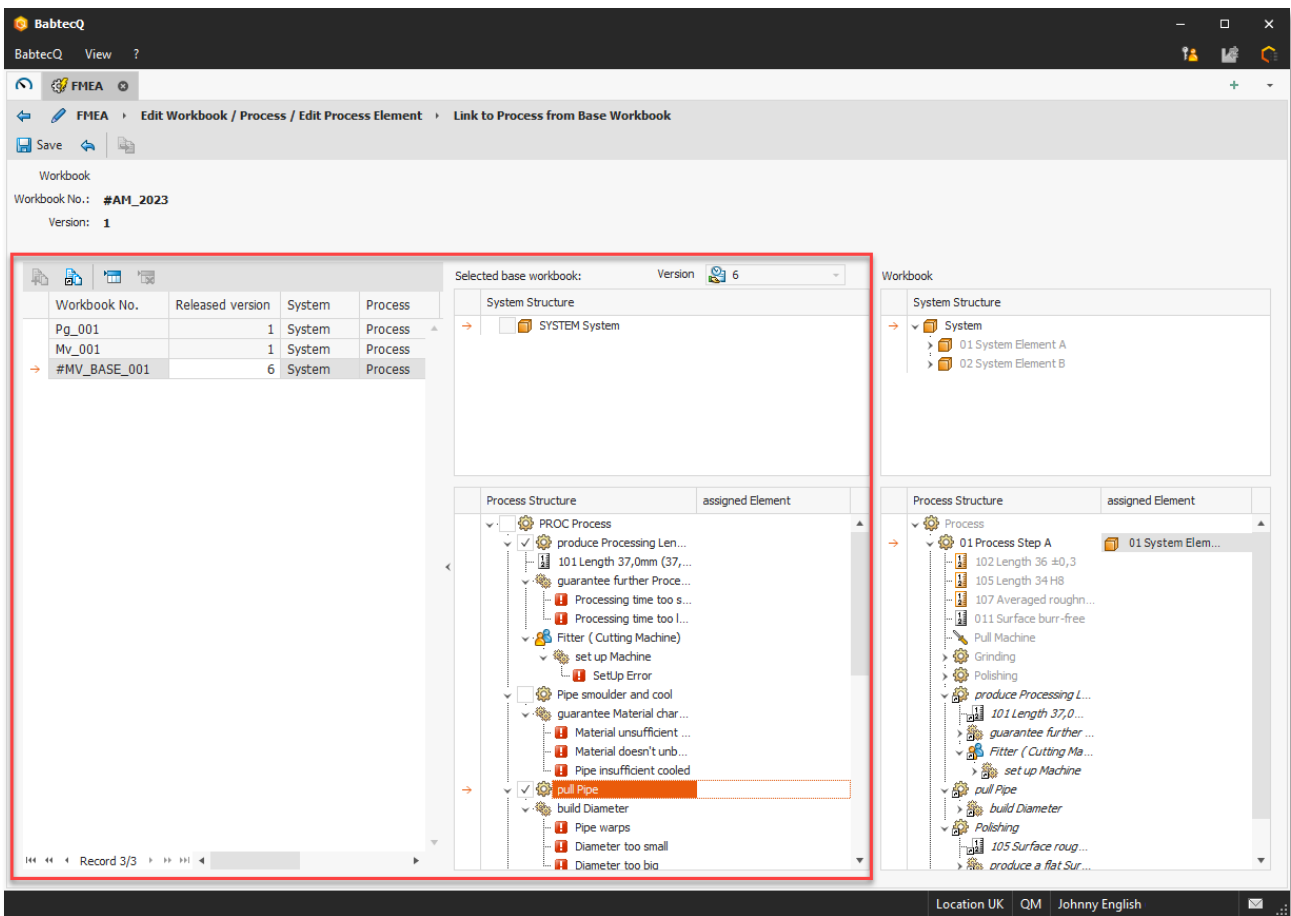


Fig.: New wizard with system and process structure of the selected basic workbook

2. Create or remove link

In the structure tree of the basic workbook, use the available checkboxes to select one or more elements that you would like to use and link in your workbook. The selected elements are then **immediately arranged in the structure of your workbook** and displayed in italics. You can now see directly how the system or process structure of your workbook will expand or change. The checkboxes can also be used to remove existing links - the previously linked elements remain as local elements in the structure of your workbook. All changes made only take effect **when you save** them in your workbook.

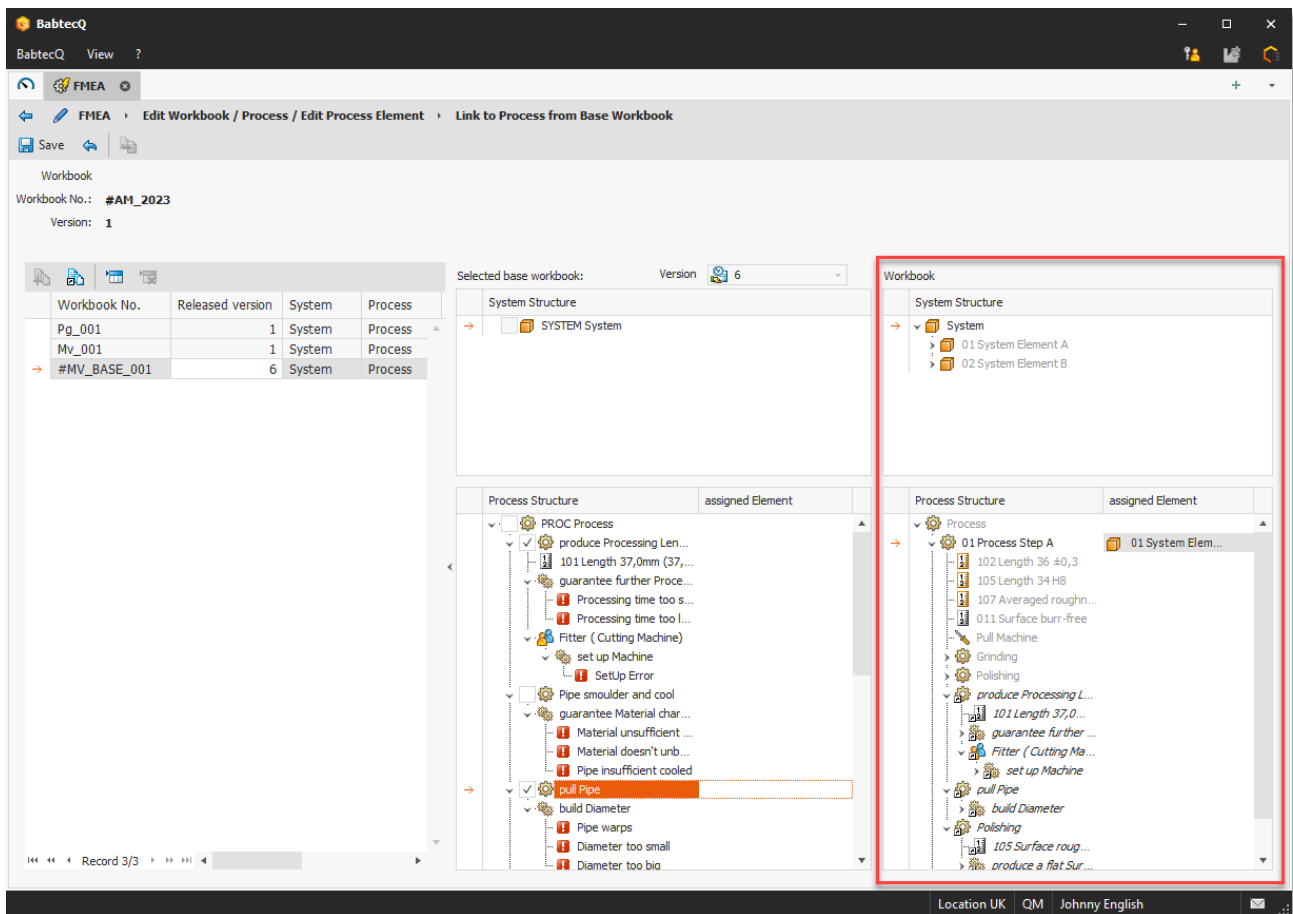


Fig.: New wizard with system and process structure of the opened workbook, incl. preview of the newly linked elements

1.7.3 Update linked elements from basic workbooks

As before, the release of a base workbook means that the workbooks containing linked elements of this base workbook should be updated. If you had activated the **option "Workbook with extended functionality for linking basic workbooks"** when creating the workbook, you will be asked to check and update the relevant workbooks - an automatic update of these workbooks is not yet available. However, even in this case, our new wizard will support you step by step **in update mode with new transparency**.

This is because the **changes in the new version** of the basic workbook are **highlighted in color**, giving you a quick overview of the changes.

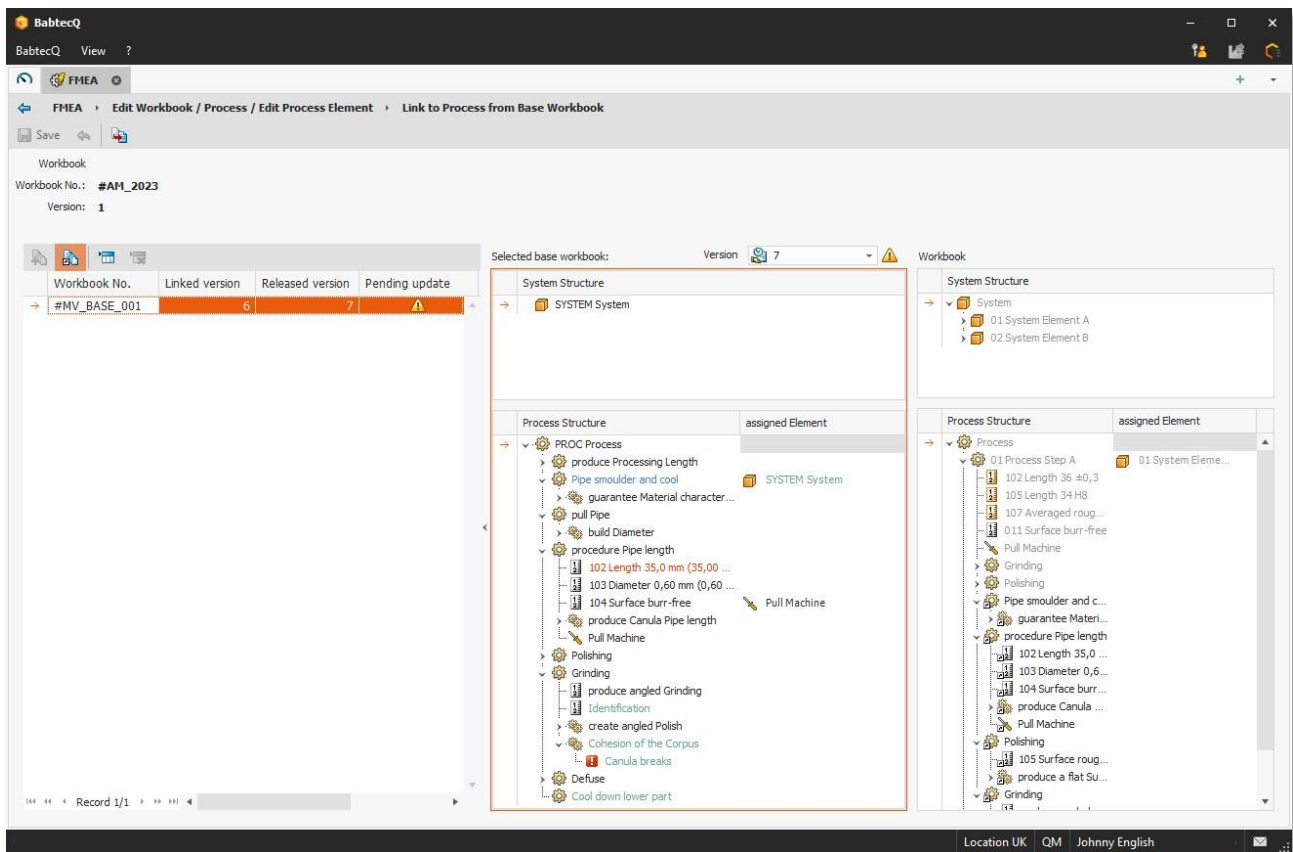


Fig.: New wizard in update mode with color coding of all changes in the new version of the basic workbook

Use the **"Apply changes"** function call to transfer all changes to your workbook. The effects are then immediately visible in the structure of your workbook and are **easy for you to understand thanks to the marking with symbols**.

This makes it much easier for you to check and decide whether the changes should also be applied to your workbook. All changes - as they are now displayed in the structure of your workbook (e.g. deletion, addition of elements or changes to content) - are only actually transferred **when you save**.

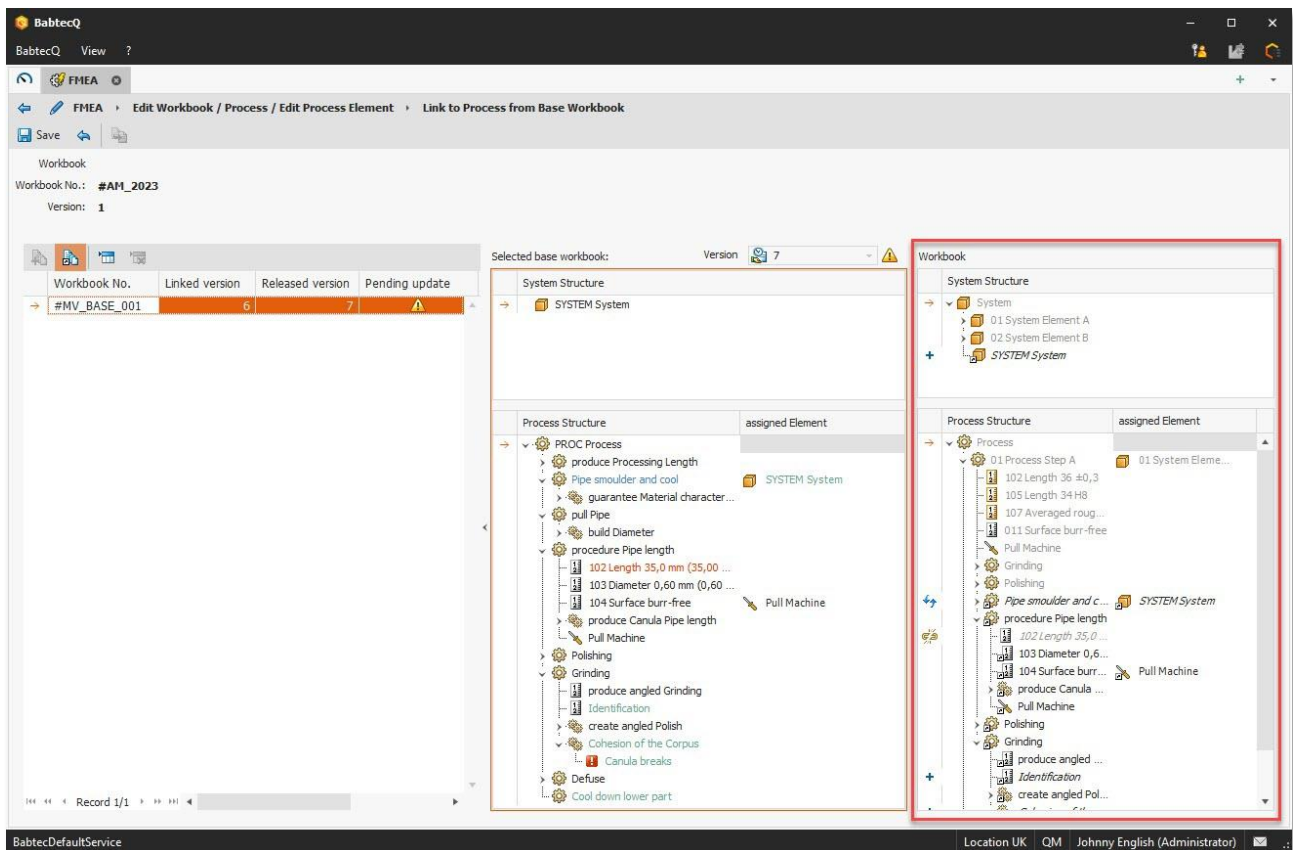


Fig.: New wizard in update mode with the changes transferred to the workbook, marked with symbols

1.7.4 The new rules and benefits at a glance

The new use of basic workbooks will offer you many advantages, including

- Checkboxes in the new wizard now allow **multiple selection of structure elements** (system or process elements) that you want to use and link in your workbook or for which you want to remove an existing link.

As a result, the integration of one or more basic workbooks can now be carried out with **significantly less effort and much less time** compared to the previous "Link to sub-process from basic workbook" wizard.

- Because the entire system structure of this base workbook is now always transferred to the workbook when linking process elements that have an assigned system element, the same system elements are **no longer created multiple times when updating the workbook**. Furthermore, if another process element with an assigned system element is linked from the base workbook at a later point in time, the system element already in the workbook is referenced or the new system element is included in the system structure of the workbook.
- New handling of **structure elements of the type production facilities and personnel**: For methodological reasons, these elements are now always linked to the immediately superior process element. Similarly, an existing relationship can only be removed by unlinking the immediately superior process element.
- In update mode, the new wizard lets you easily see **what has changed in a new version of a linked base workbook** - which elements have changed in content (blue), which are new (green) and which have been removed (red).

A **change to the "item-specific" option** (e.g. from deactivated to activated) is now also taken into account as a change for characteristics.

- In addition, you can now also see from the colored marking in update mode whether the assignment to the control plan or to the process FMEA has **changed for the product characteristics that are in the process structure of the base workbook** - if product characteristics have been newly added to the process structure via the "Inspected" or "Manufactured" checkbox or if the assignment type (to the control plan or to the process FMEA) has changed or if the assignment has been removed and the product characteristics are therefore no longer in the process structure.
- In the wizard, you will now find detailed information on the **status of a linked base workbook** in relation to which version is currently linked to your workbook or whether a newer but historic version already exists or on the currently released version of the base workbook.
- The **differences between the versions** of a linked basic workbook and the currently linked version are visualized.

The workbook does not necessarily have to be updated to the status of the currently released version of the base workbook (default behavior); optionally, it can also be updated to a **newer but historic version of the base workbook**. Omitted updates can be made later.

- You quickly receive an **overview of the linked workbooks** for the selected local structure element (system or process element), including the status of the update.
- The new wizard offers you a **useful preview** when creating, maintaining and updating links from basic workbooks by simultaneously displaying the structure trees - in each case for the basic workbook (source) and the workbook (target).

If you would like to find out more about the **new rules** for the new use of basic workbooks, please refer to the online help.

1.7.5 Current restrictions with regard to the planned scope of services

We hope that the advantages of the new use of basic workbooks will convince you. Please note the current "limitations" in version 7.9 compared to the previous behavior and with regard to the planned scope of services that we will provide you with the upcoming versions:

- No automatic update and release (manual or automatic) of a workbook based on a newly released version of a linked base workbook is yet available - i.e. the configuration parameter "Update on release of base workbooks" does not apply. Currently, the workbooks must be updated and released manually using the new wizard.
- The central overview of the basic workbooks linked in the workbook does not yet contain a function for applying changes.
- The "Move", "Delete" and "Unlink" functions are not available in the structure tree for elements that are linked to a basic workbook. To be able to execute these functions, the existing link must first be removed using the new wizard ("Link / Update basic workbook" function).
- The setting for how the sorting of linked elements in the workbook should be handled is not editable. The option is currently set to "individual order".
- Due to the extended range of functions, updating a workbook is linked to the "System or process analysis edited in own AM" right in addition to the "Apply changes from basic workbook" user right.

1.7.6 FMEA: Function Net

As part of the function analysis, it makes sense to link the identified functions and characteristics in a function net according to their effect. The "Add contributing function" and "Add influenced function" function calls are available in the context menu of a function (or characteristic) selected in the network, which you can use in particular if you need a quick overview of the functions and characteristics that can still be linked or if several elements are to be linked simultaneously.

As of version 7.9, you now also have the option of **grouping the selection list of linkable elements** (similar to the failure net). This gives you a quicker overview of the elements in the FMEA and you can use the column filters to easily find the elements you want to link.

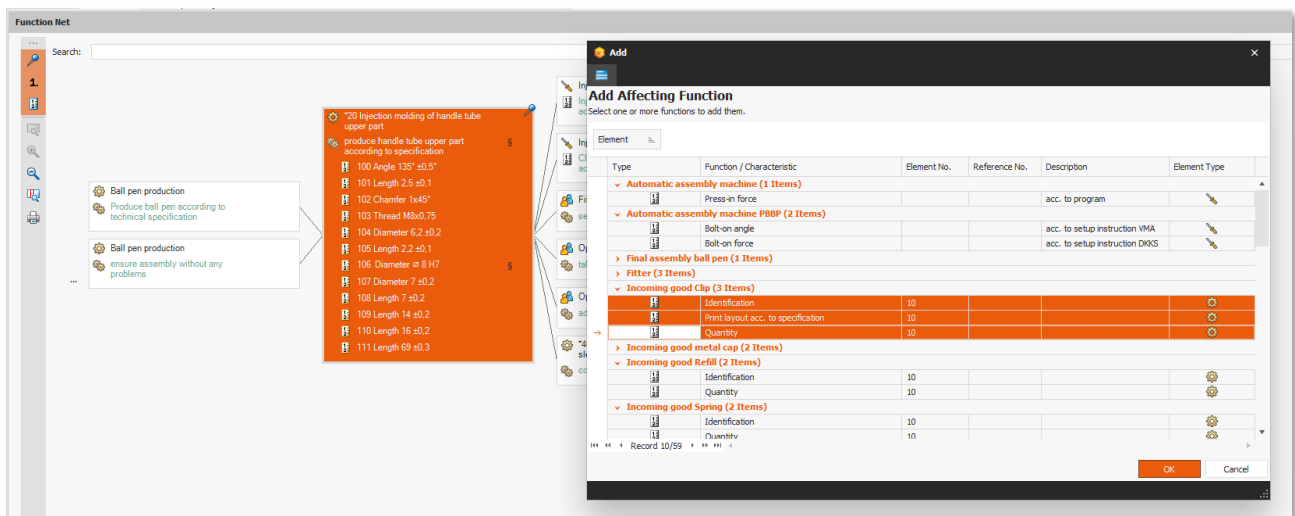


Fig.: Reports with affected field names - Left: Previous alignment, Right: Current alignment

1.8 Actions

1.8.1 Filter: Actions from Checklists

In the "Actions" module, the list views can now also be filtered by actions that were originally created when using a digital checklist.

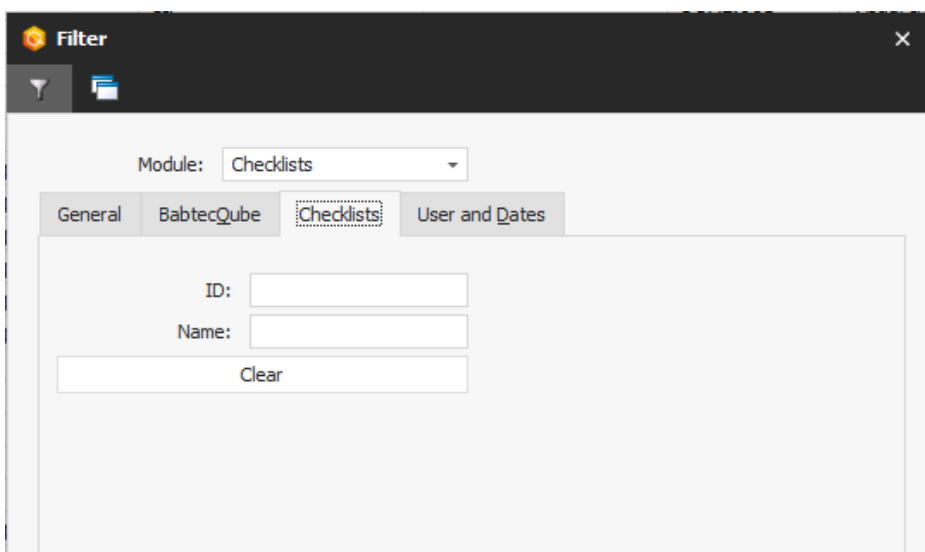


Fig.: Excerpt from the filter dialog for actions - filtering by "Checklists" module

1.9 Employee Qualifications

1.9.1 Quality Cockpit: Key figures for employee qualifications

From version 7.9, key figures are now also available for the "Employee qualifications" module, which you can make available in dashboards:

- QFM-001 for missing qualifications
- QFM-002 for employees with missing qualifications
- QFM-003 for the proportion of required qualifications met
- QFM-004 for the proportion of employees with fulfilled required qualifications

1.9.2 Documents tab: New module link for Training Courses

In most modules, not only files or links (URLs) to external information that are important in the context of the respective Babtec data record (e.g. complaint or action) can be stored here - information or data records from other modules can also be linked here.

As of version 7.9, you can now also store **data records from the "Training courses" module** as module links that are in the context of the opened Babtec data record.

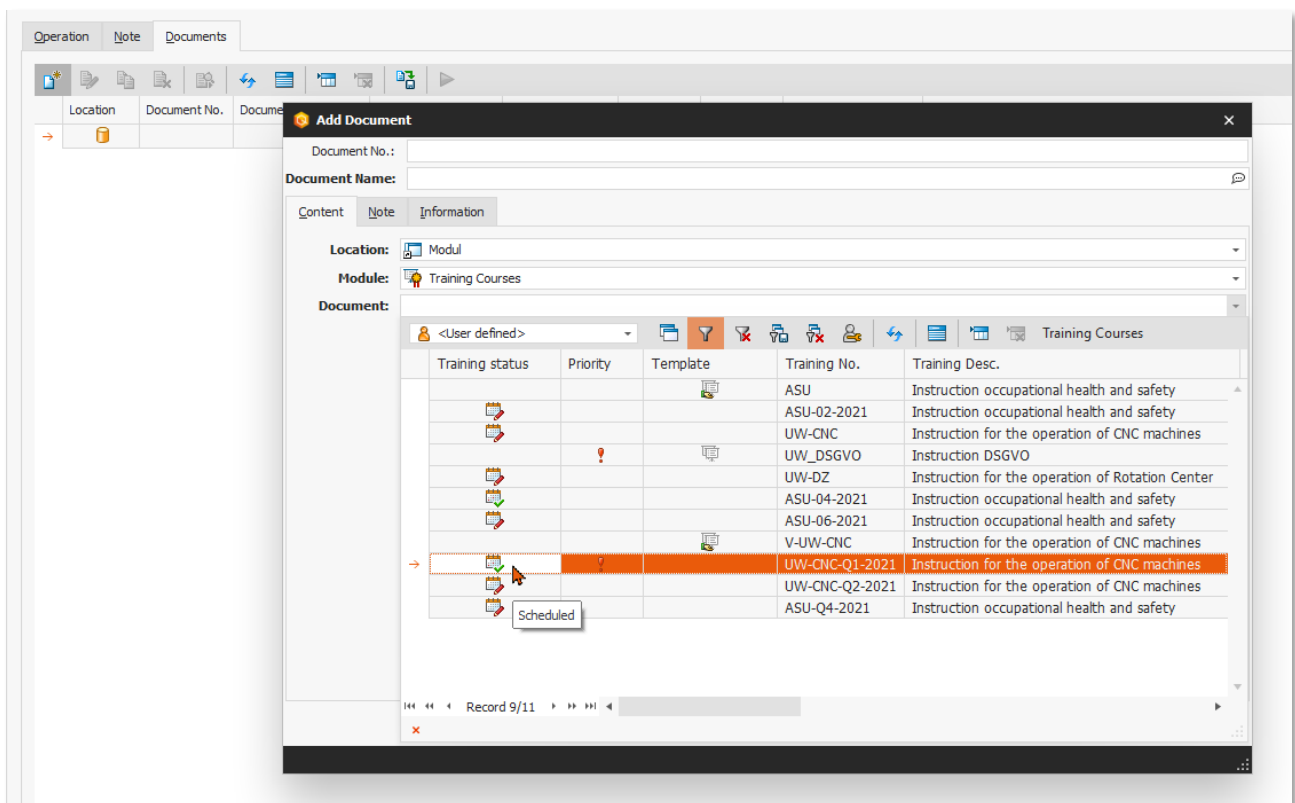


Fig.: "Documents" tab - New module link for Training Courses

1.10 Gages

1.10.1 Calibration data import according to VDI/VDE 2623

In the "Calibration data exchange" administration module, you can now define in the import settings of a calibration profile whether the calibration result should be imported from the <condition> tag (default) or from the <status> tag of the result section.

The screenshot shows the 'Edit Configuration' window for 'Calibration Data Exchange'. The 'Import Configuration' section is highlighted with a red box. The 'Calibration result from:' dropdown menu is set to '<status>'. Other fields in the 'Import Configuration' section include 'Import Event' (END_EXTKALI), 'Certificate Path' (<condition>), and 'Save Import File in History' (unchecked). The 'Export Configuration' section includes 'Export Event' (BEG_EXTKALI), 'Path' (C:\Users***\Desktop), 'Inspection Laboratory' (029), 'Customer ID' (1674-ADC), and 'Export of multiple gages to one file' (checked).

Fig.: Configuration of the import settings

Background:

The calibration service provider Perschmann Calibration GmbH provides its customers with the results of the calibration by means of a file in accordance with VDI/VDE 2623. The result of the inspection is transmitted in two fields:

- in <condition> (mandatory field according to the interface description) the results of the calibration are transmitted according to the conformity catalog

The assignment of <condition> to <status> is agreed between the contractual partners in consultation with Perschmann. With the extension described above, you can now set which information from the transmitted calibration data is to be used for the documentation of the calibration decision in the "Gage" module in accordance with your agreement.

1.10.2 „Resolution" parameter

The "resolution" parameter is one of the key data of a gage. The resolution is therefore stored in the gage key data. In addition, the resolution is also specified in the master data of a gage in the "Calibration data" area.

As of version 7.9, the system now ensures that this parameter has the same value in both the gage key data and the calibration data, provided that the resolution was specified in the gage key data (depending on the gage type).

This means for you: If the **resolution is stored in the gage key data**, this value including the unit is always also displayed in the calibration data. If the resolution is changed in the gage key data, the resolution is also immediately updated in the calibration data. For this reason, the field in the "Calibration data" area is now write-protected in this case. As long as the gage key data does not contain a resolution, the field in the "Calibration data" area can be edited.

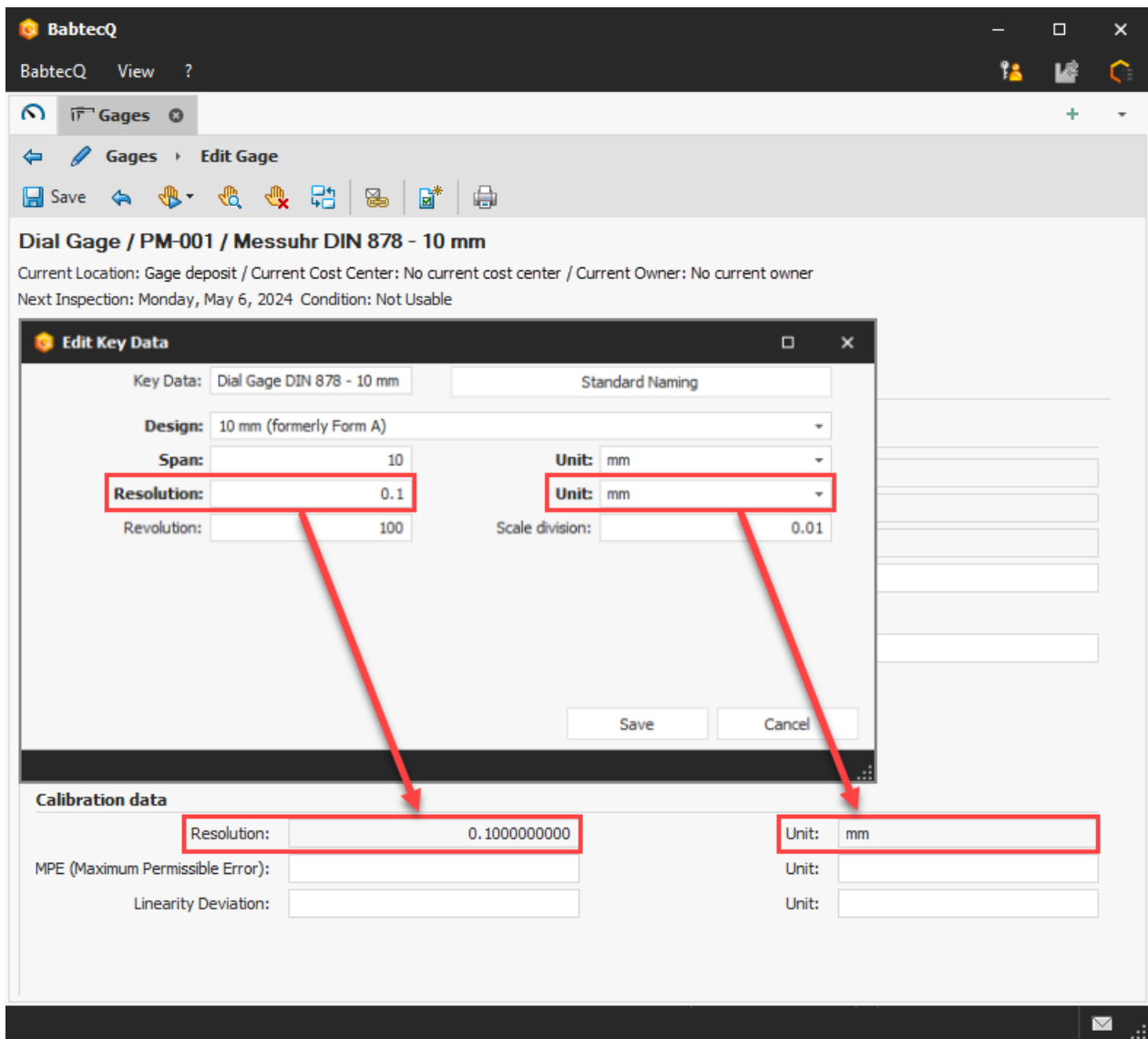


Fig. Resolution in gage key data and calibration data

1.10.3 Inspection instruction according to VDI/VDE/DGQ/DKD 2618 sheet 11.4

In version 7.9, a **new inspection instruction for electronic digital dial gages** based on the VDI guideline was provided in the "Inspection instructions" catalog. An associated gage standard enables the maintenance of the relevant error limits according to the manufacturer's specifications and internal factory specifications for the internal test of electronic digital dial gages.

Excerpt from the new inspection instruction for electronic digital dial gages in the acquisition mode of a monitoring test.

El. dig. dial gage / EDDG-001 / T-100 - 10 - 0.1
 Inspection Instruction: VDI/VDE/DGQ/DKD 2618 - 11.4 - EDIG / Test instruction f. el. dig. ind. gauges [2020-08]
 Inspection Type: Control Check

3.78 USL : 4.000 mm
 LSL : -2.000 mm

Characteristics Instructions

12. (1) Hysteresis Error

Calibration Master: EDDG-001 El. dig. dial gage
 Initial test
 Gage: 004 Dial Gage, Manual

Characteristics Group	Standard Characteristic	Characteristic	Nominal Dimension	Current Value	Unit	Status	Status
		Preparation				●	Read
		Cleaning				●	OK
		Visual Inspection				●	OK
		Rework				●	Read
		Technical Documentation				●	Read
		Function				●	OK
		Acclimatization				●	OK
		Scope of Calibration				●	Read
		Performance of Calibration				●	Read
Repeatability	Characteristic repeatability	Measuring Point 1	1.000	1.000	mm	●	OK
		Measuring Point 2	1.000	1.000	mm	●	OK
		Measuring Point 3	1.000	1.010	mm	●	OK
		Measuring Point 4	1.000	0.990	mm	●	OK
		Measuring Point 5	1.000	1.010	mm	●	OK
		Repeatability			0.020	mm	●

Fig.: Extract from the new inspection instructions for electronic digital dial gauges in the recording mode of a monitoring test

1.11 Measurement System Analysis

In the "MSA" module, you can carry out and document the required tests to ensure and prove that your planned gages and inspection processes are suitable for the respective measurement task and capable of delivering valid results. Our aim is to provide you with the necessary processes as quickly as possible in accordance with the latest specifications and guidelines.

For this reason, a new attributive process according to VDA Volume 5, 3rd edition (2021) is now also available in this version.

Please note: The basic procedures "**Measurement uncertainty (Upm)**", "**Measurement uncertainty Upp)**", "**Measurement uncertainty (QMS)**" and "**Measurement uncertainty (QMP)**" are no longer supported. Therefore, as of version 7.9, you can only create new MSA processes according to VDA 5 on the basis of the basic processes "**Measurement uncertainty QMS (2021)**" and "**Measurement uncertainty QMP (2021)**".

1.11.1 Attributive process according to VDA Volume 5

Version 7.9 offers you a new attributive process for your MSAs that meets the requirements of the current VDA guideline (2021) - with kappa method (Cohen, Fleiss), signal detection and effectiveness assessment.

A new wizard guides you step by step through the creation of a new MSA, including information on the characteristic, the gage or the required process parameters. And of course, in addition to carrying out the process, a suitable analysis and a report are also included in the scope of delivery.

By the way, now when using the new attributive process (compared to the "old" attributive process):

- ensures that the testers' ratings can only be entered once the **reference data has been fully recorded**,
- the inspection decision is **correctly preassigned** in the inspection decision dialog depending on the results determined and the limit value, and
- The analysis of the effectiveness analysis in the new report has been supplemented by the **absolute number of decisions**. In addition, the resolution is now displayed in units.

Further information on the report: 1.11.2 | Attributive process according to VDA Volume 5: Report

All further detailed information about the new process and the methods used can be found in the online help.

VDA5 - Attributive (2021)

Process No.: VDA5 - Attributiv (2021)

Process Name: Effectiveness, Kappa method, signal detection

Created by: System Created on: 31/10/2023 11:42:28

Changed by: Changed on:

Specifications for the test setup

Count of Repetitions		Count of Parts		Count of Testers	
Min:	2	Min:	50	Min:	1
Standard:	2	Standard:	50	Standard:	3
Max:	10	Max:	200	Max:	5

Method of effectiveness

Confidence level: 95.00%

Decision	Effectiveness	Bad parts assessed as good	Good parts assessed as bad
Inspection system is capable:	\geq 90%	\leq 2%	\leq 5%

Kappa method

Assessment according to Cohen-Kappa
 Assessment according to Fleiss-Kappa

Decision	Limit for Kappa
Inspection system is capable:	\geq 0.90

Signal detection method

When using this method, a reference measured value must be recorded for each test part.

Decision	Limit for the capability
Inspection system is capable:	\geq 30%

Fig. New attributive MSA process

1.11.2 Attributive process according to VDA Volume 5: Report

When creating the new "Attributive suitability test" report, you can decide in the report configurator which of the analyses performed should be included in the report. If "Kappa" was analyzed, you can also decide whether intermediate results should be included or not - this applies to the cross table for "Cohen-Kappa" or the determination scheme for "Fleiss-Kappa".

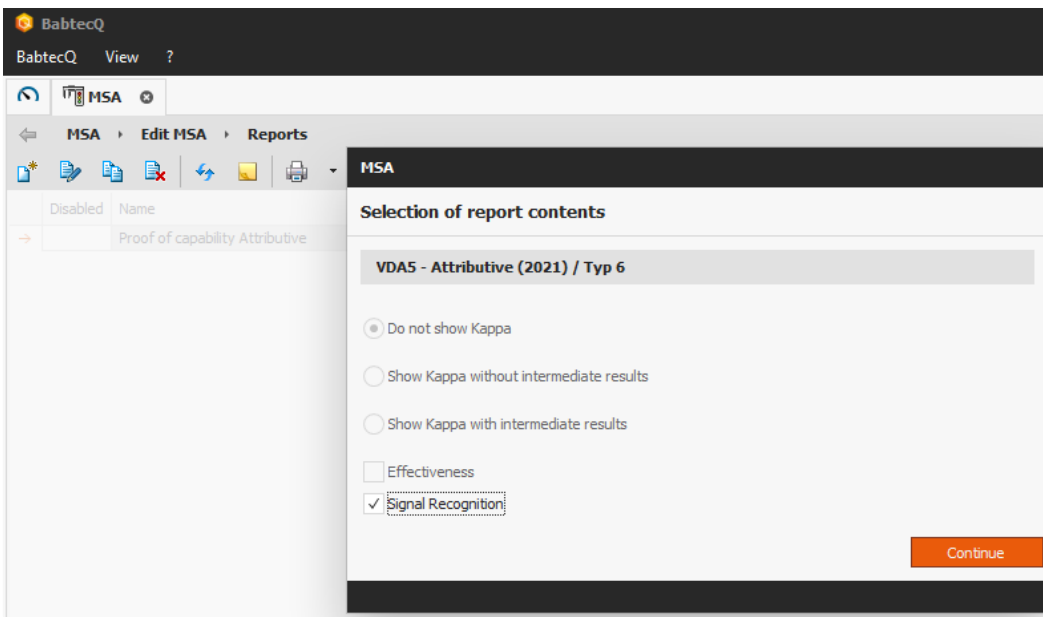


Fig.: Configure report

The report is then generated according to your selection in the report configurator.

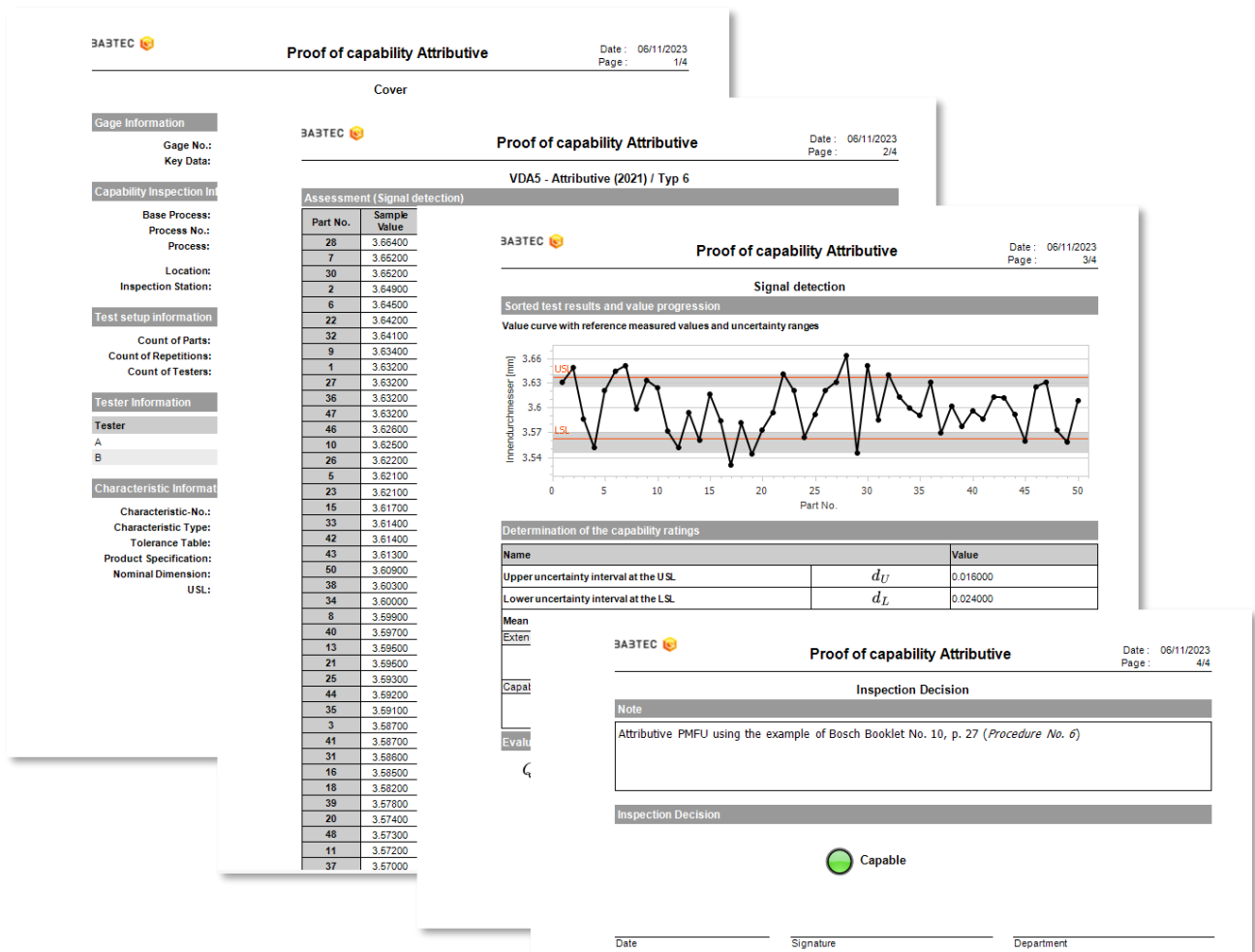


Fig.: Example of the "Attributive proof of suitability" report

1.11.3 Additive process: Signal detection (Bosch process 6)

With the provision of the new MSA process "VDA5 - Additive", the signal detection method has been updated. The calculation now corresponds to Bosch process no. 6.

Please note: The process variation %GRR is shown as "QMP" in the new process. If the process designation "Bosch process 6" is to be printed in the report, copy the system process "VDA5 - Additive" in the "MSA process" catalog and assign a new MSA process number (→ "Bosch process 6").

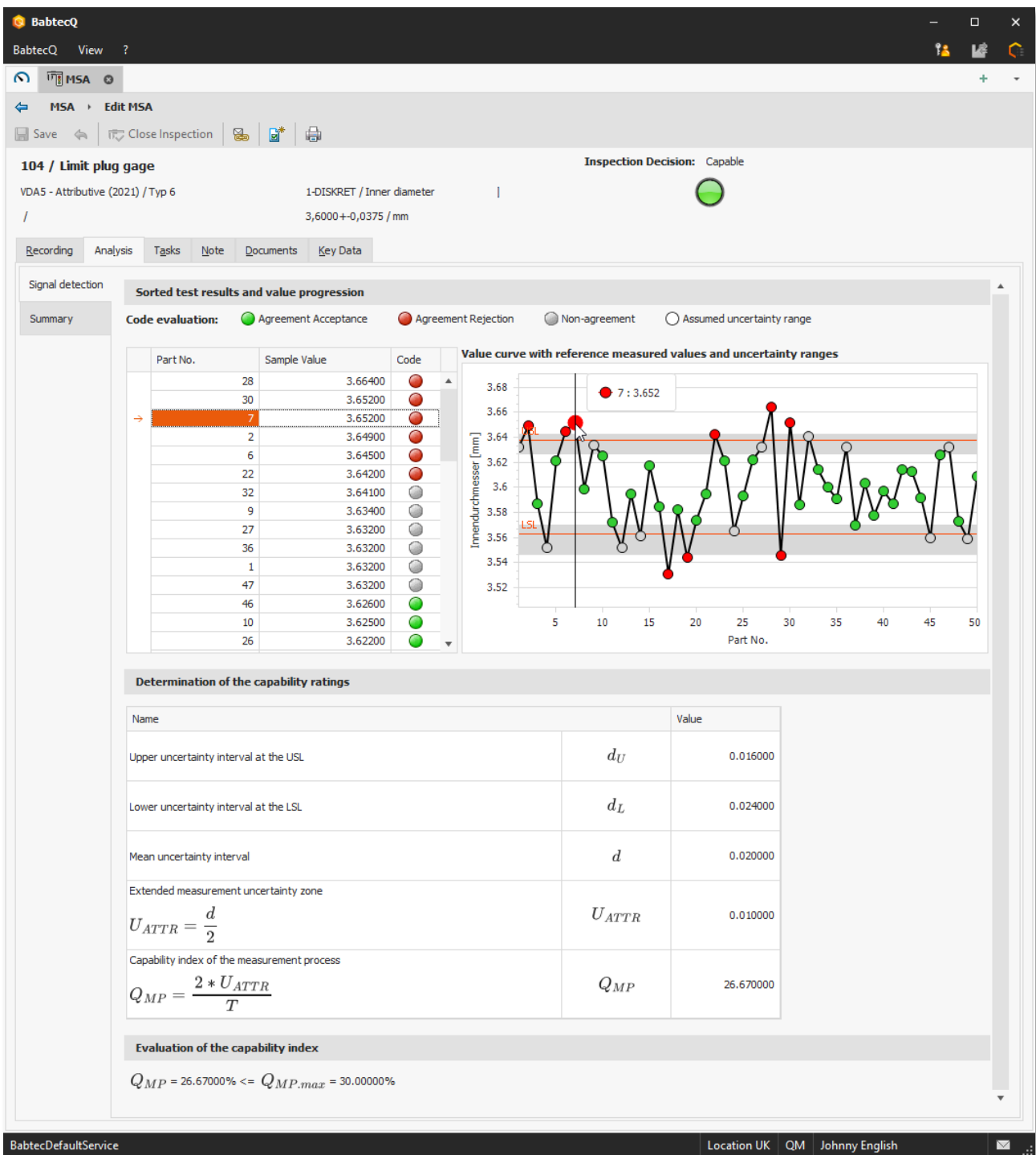


Fig.: Signal detection according to the example calculation from Bosch booklet 10, p.27

1.11.4 Attributive process: Fleiss-Kappa (Bosch process 7)

The kappa method has been updated with the provision of the new MSA process "VDA5 - Attributive". Two options are now available for determining kappa: kappa according to Cohen or kappa according to Fleiss.

1.11.5 Copying MSAs

In version 7.9, it is now possible to use a copy based on an existing MSA to create a new MSA - regardless of whether the MSA has already been completed or is still being processed.

You can edit the key data in the copied MSA. In addition, you now also have the option of reusing previously recorded measured values from any existing Babtec MSA, CSV or Q-DAS file in the "Measurements" tab of a MSA.

Further information: 1.11.6 | Import measured values

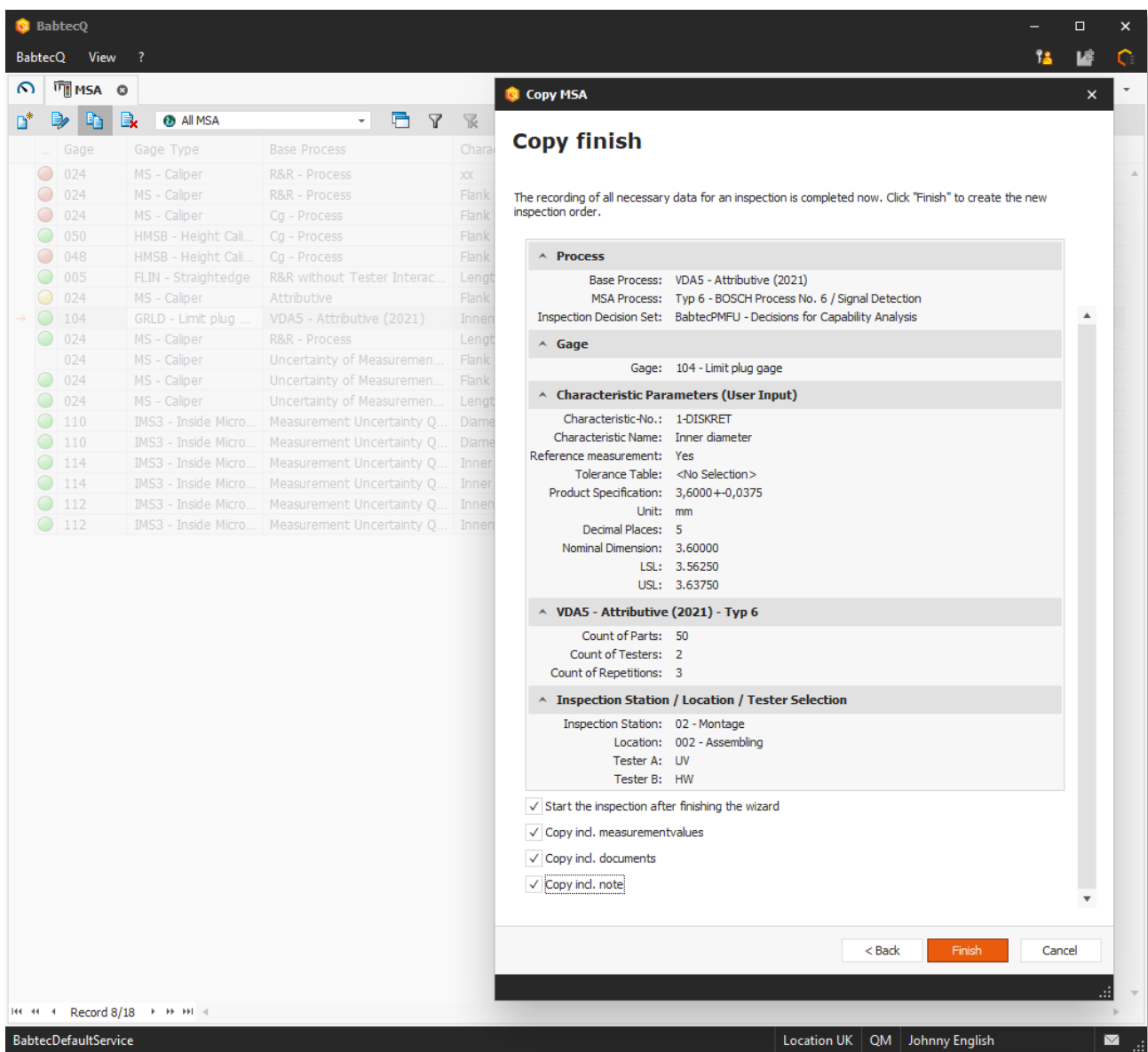


Fig. Copy MSA - Options for deciding which data should be copied to the new MSA

Please note that measured values can only be copied to the new MSA if you have not previously changed the basic or MSA process or the test setup for the new MSA in the wizard - otherwise the "Copy incl. measured values" option is deactivated.

1.11.6 Import measured values

In every MSA in which a variable process is used, you can now also access previously recorded measured values from other sources. For this purpose, the new **"Import measured values"** function is available on the "Measurements" tab when editing a MSA, which you can use to import and reuse measured values from another Babtec MSA, from a CSV or from a Q-DAS file.

For example, recorded measured values from an MSA investigation that has already been carried out can be reused in a VDA MSA.

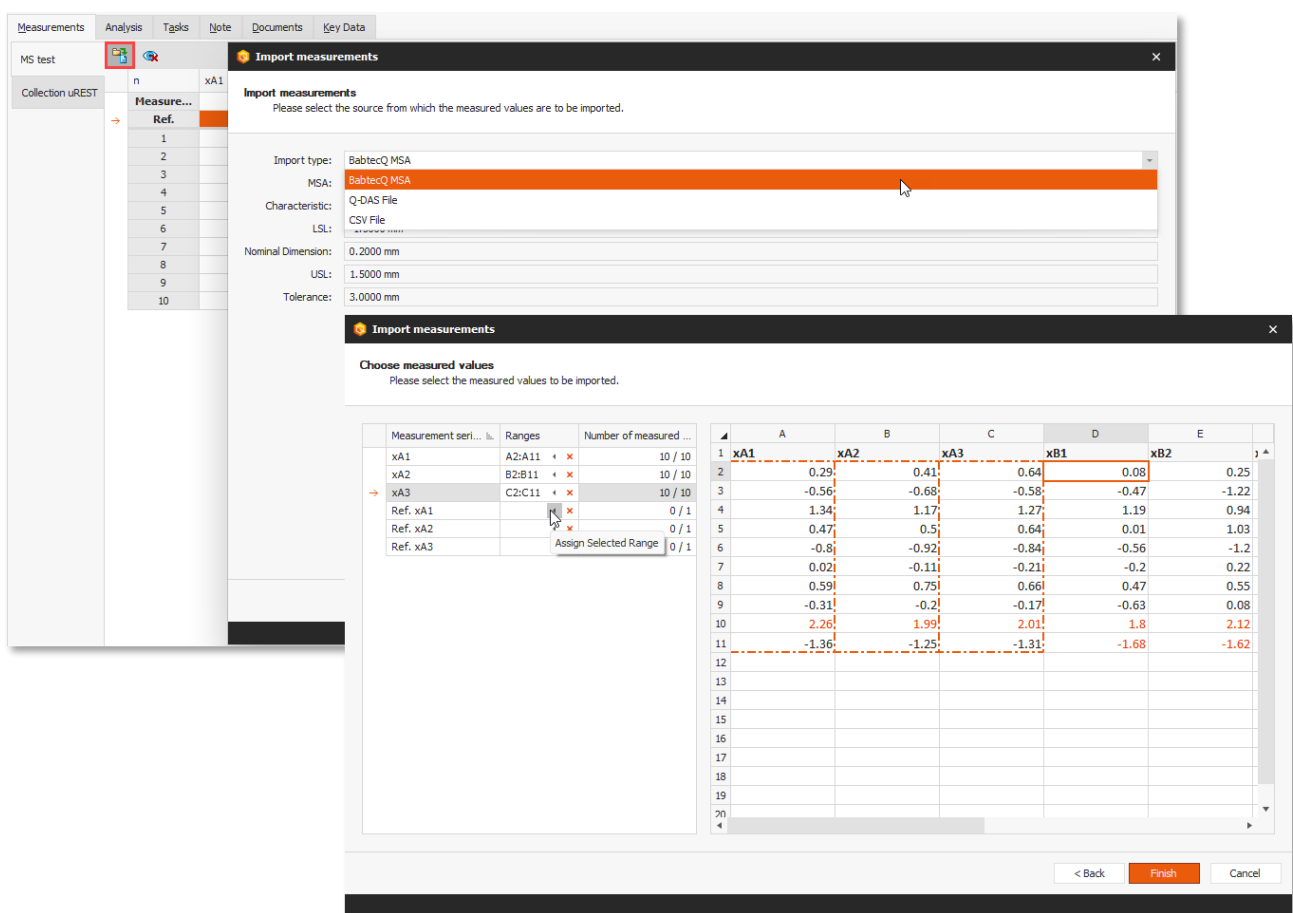


Fig. new wizard for "Import measured values" - select measured values for import here, from a BabtecQ MSA

Please note that the new "Import measured values" function is available in all MSAs that use one of the following basic procedures and have not yet been completed:

- Cg-Process
- R&R process
- R&R without operator influence
- Measurement uncertainty QMS (2021)
- Measurement uncertainty QMP (2021)

1.11.7 List view: Tolerance

In the "MSA" module, the "Tolerance" column has been added to the list view - you can now also use the tolerance specification of the characteristic when searching for a specific MSA using the detail filter.

The "Tolerance" field has also been added to the filter dialog for creating views.

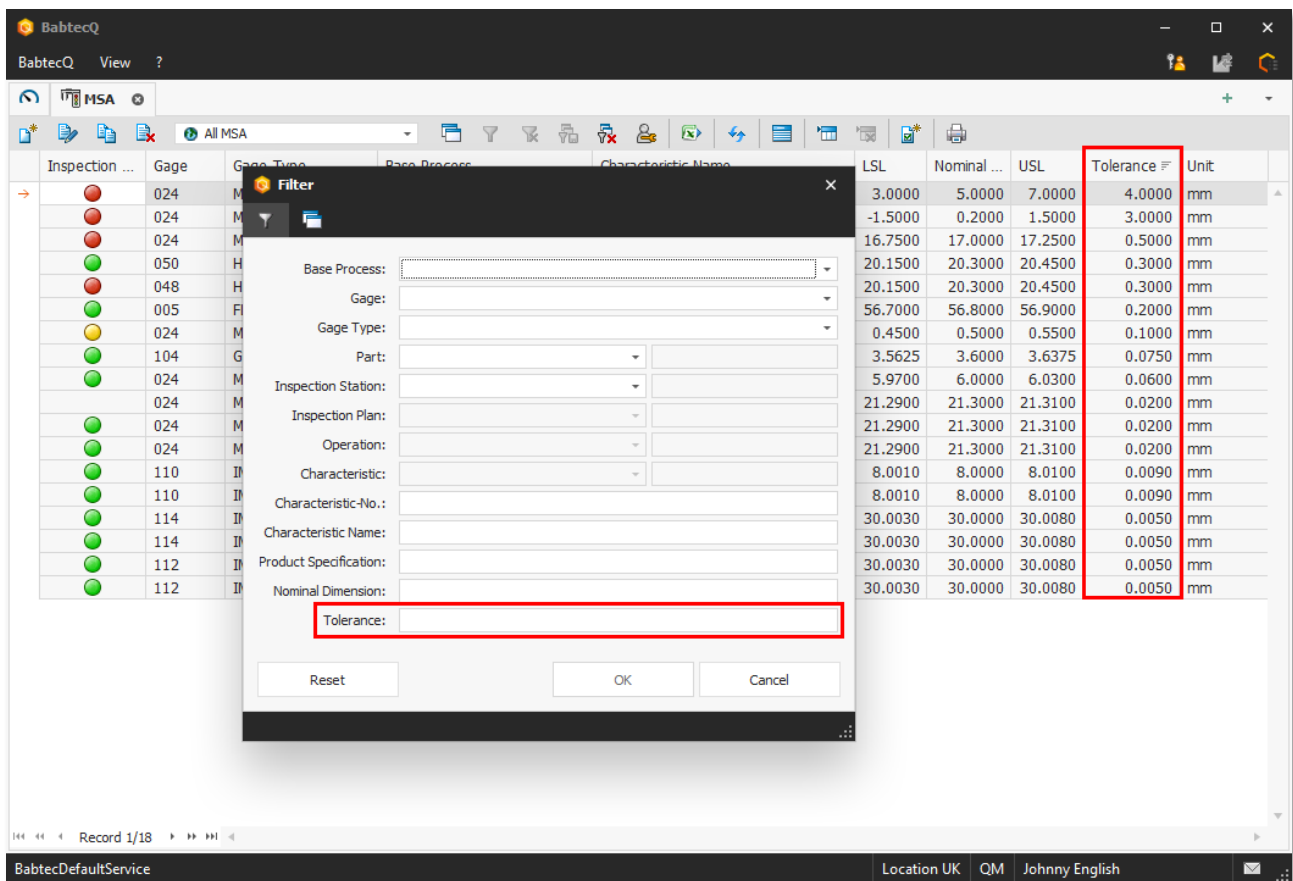


Fig. List view and filter for MSAs - now with "Tolerance" of the characteristic

1.12 Inspection Plans

1.12.1 Family Inspection Plans

An important objective in the further development of our software modules is to ensure **high-performance use**. If family inspection plans have a large number of linked inspection plans, there may have been longer waiting times in the past when a new version of the family inspection plan was released. In version 7.9, a significant improvement in performance has been achieved in this context.

1.12.2 Multilingual note fields

If your BabtecQ system is configured as multilingual, you can maintain the content of the multilingual fields in the activated languages. Note fields, however, are not yet multilingual.

However, because inspection plans and the inspection instructions derived from them for carrying out the planned quality inspections in the "Inspection" module are very often used at **foreign production sites**, all

relevant information should be provided to the testers there in the language in which they are registered. For this reason, all note fields in the inspection plan are now also multilingual.

What does this mean for your existing inspection plans?

The inspection plans are unchanged after the update to version 7.9 - **the notes at inspection plan, operation and characteristic level** are still only contained in "one language", so that the same content is displayed in each language as before. However, if it is now necessary to maintain the notes in more than one language **for certain inspection plans**, you can decide in a **new working version of the inspection plan** for each individual note whether it should be converted into a multilingual note.

To do this, you will find the **new "Create multilingual note" function** in the toolbar of a note. The existing content is converted according to the supported formatting options and initially only saved in the language in which you are logged in.

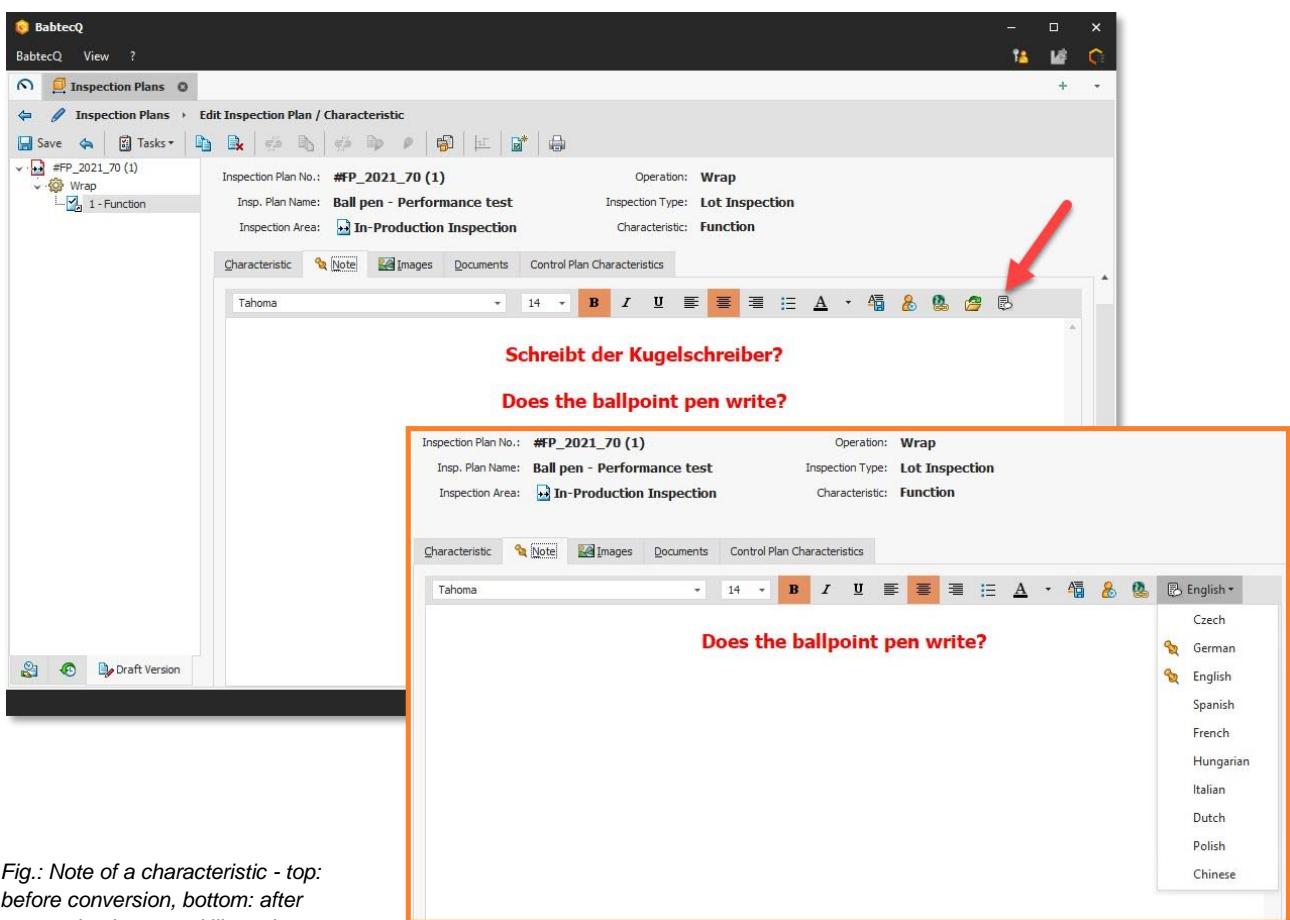


Fig.: Note of a characteristic - top: before conversion, bottom: after conversion into a multilingual note

Please note that the content may differ after the conversion due to the formatting options available in multilingual notes. Therefore, please inspect the new content - the conversion of the original note content and the creation of the multilingual note is only complete **when the inspection plan, operation or characteristic is saved**. Until then, the conversion can be undone.

After converting the note field, you can edit the note with **various formatting options** (colors, fonts, etc.) and maintain it in the required additional languages. It is not possible to **add images** to a multilingual note. As soon as content is available in a language, this language is marked with an icon in the selection list.

If the inspection plan or order is now used in the "Inspection planning", "Inspection" or "Orders" modules, the **content** of the multilingual notes is now displayed in the **respective language** of the logged-in user (as for any other multilingual field).

1.12.3 Import characteristics: Presetting for sampling scheme

Characteristics can be imported into an inspection plan from various sources, including from another inspection plan, from a part approval process or from a drawing. If the characteristics are imported into an **inspection plan operation with lot inspection or FRC inspection type**, the default setting for the sampling scheme has now been **standardized** at characteristic level:

- If the characteristic in the source does not contain a sampling scheme, the characteristic is imported with the content "No selection" in the "Sampling scheme" field.
- If the characteristic in the source contains a sampling scheme, the sampling scheme is transferred to the inspection plan characteristic.

1.13 Inspection

1.13.1 Q-DAS Interface: Characteristics with formulas

When recording measured values via a Q-DAS interface, the file contents are validated against the specification of the inspection plan characteristics after manual selection of the Q-DAS file.

Characteristics whose measurement result is only obtained via a formula calculation are not validated against the LSL and USL values defined in the inspection plan. In this case, a formula symbol is displayed in the "NOK" and "n.o.k." columns in the dialog.

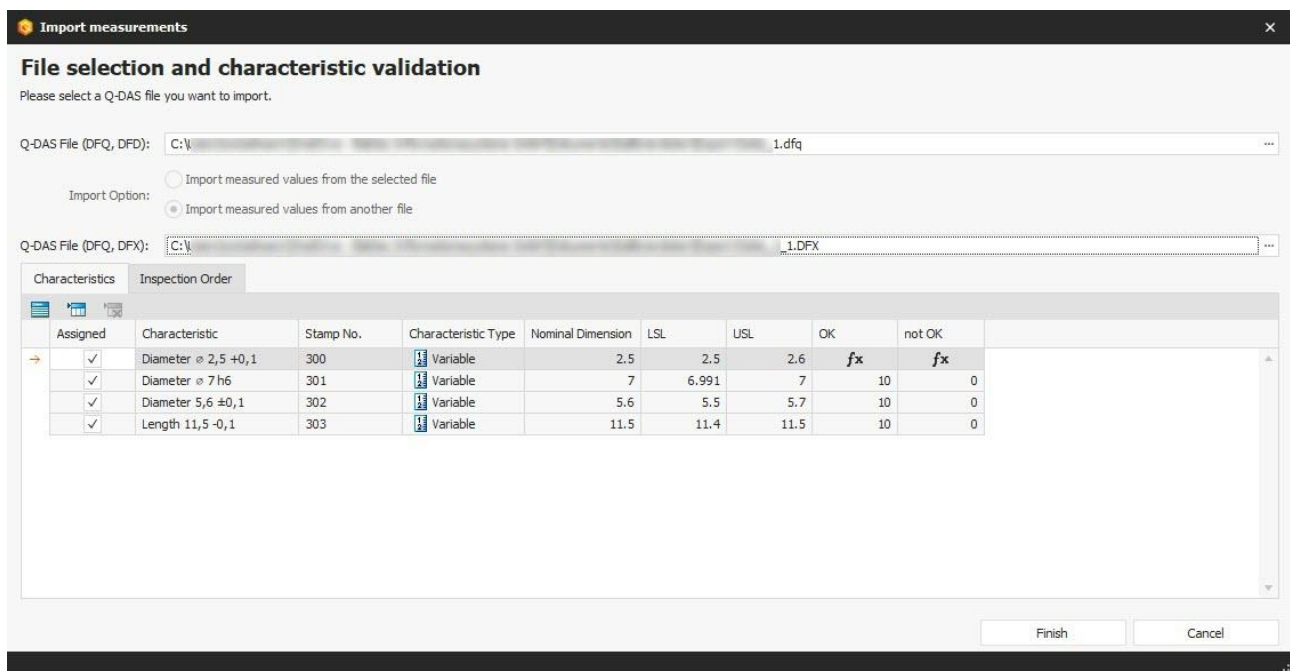


Fig. Characteristic validation before importing a Q-DAS file

1.14 Quality Cockpit

As we informed you in the product information for the last version, the "Quality Cockpit" and "Quality Cockpit Dashboards" modules are **no longer available** from version 7.9.

Your existing key figures are of course not affected by this and can **still be made available to users in BabtecQ dashboards** - and also **company-wide in the browser-based BabtecQ Go frontend**.

Just in case you are not yet using BabtecQ Dashboards: It's all about providing important and up-to-date information about the quality of your products and processes in a **compact and clear way**. Create dashboards for different user groups or as a basis for your personal work. Decide **which figures, data, facts and information** are important for employees and management - you can individually compile the required "tiles" as well as their content, position and size in the **Dashboard Designer**.

Since release 7.2, you have also been able to use the **"Quality Cockpit key figure" tile**, which now has a **much wider range of functions** than the "old" Quality Cockpit dashboards. In the new tiles, you can record the **key figure history** and create **actions** for the key figure. We will therefore continue to plan further development of the Quality Cockpit key figures for the new dashboard only.

Please note:

If you have not yet created all Quality Cockpit dashboards as new dashboards, please inspect them **before updating to Release 7.9** to see whether there is still any need for action. If you have any questions, please get in touch with your contact at Babtec.



Fig.: Example of a dashboard with QC key figures - here in the browser-based front end BabtecQ Go

1.15 Complaints | BabtecQube

When dealing with deviations and complaints, it is almost always necessary and useful to exchange new information, findings and data directly with your business partners - i.e. with suppliers and customers. The aim is to find and initiate effective actions to eliminate the causes of problems and failures in the future. You proceed systematically and use the proven and required 8D method.

If you also rely on BabtecQube, for example, to share failures detected in purchased products from the recorded BabtecQ supplier complaint with your suppliers and work together to resolve the problem, then the new release offers interesting new features for you.

1.15.1 Support for the VDA 8D report (2018) with 8D deadlines

With version 7.9, the exchange of complaint data (sharing failures and receiving the 8D report) via BabtecQube is now based on the 8D report currently required in the VDA guideline (2018).

In this context, the deadlines or dates defined for the individual 8D steps are now also synchronized with the BabtecQube.

The screenshot displays the BabtecQube interface for handling a customer complaint. On the left, a navigation sidebar includes options like 'Start Page', 'Dashboard', 'Complaints & Deviations', and 'Analyses'. The main content area is split into two sections:

- Customer Complaint:** Shows details for a complaint from 'Flexx AG'. It includes a 'D1 - Team' section with team members like Florian Kondziela (Team Champion), Bernd Barmüller (Contact Person), and Lea Sophie James (Additional Team Member). A 'Replacement Delivery' action is listed with a status of 'In Process' and a due date of 05/12/2022 12:00 PM.
- 8D Report:** Displays a structured 8D report for 'Flexx AG'. It includes fields for Start Date, 8D Title, 8D Report Number, Version, and Status. A table lists team members with their names, departments, functions, and contact information. The 'D2 Problem Description' section contains a detailed description of the issue: 'The photo cell does not detect the movement of the mouse wheel correctly. The problem has been analysed. The movement of the mouse wheel is only sporadically detected by the photo cell, so that there are "jumps" when scrolling.' An image of the mouse wheel assembly is shown with red arrows pointing to the photo cell.

Fig.: Split complaint in BabtecQube - processing according to the current VDA 8D report (2018)

Nevertheless, BabtecQube ensures that complaints from older BabtecQ versions can still be shared and received with business partners. Depending on the BabtecQ version from which a complaint was shared, the processing masks in BabtecQube automatically adapt for the user.

Backwards compatibility is also ensured for the exchange of complaints between two BabtecQ systems via BabtecQube.

Version 7.9 offers further useful general changes and enhancements for the exchange of complaint data:

- The exchange of **8D report actions** (i.e. from the supplier to the customer) via BabtecQube has been optimized so that the action status shared by the supplier (Open, Completed, Tested) corresponds **1:1** to the imported action status in the customer's BabtecQ system.
- In addition, the fields "To be inspected by (supplier)" and "Commissioned by (supplier)" are also displayed for 8D actions imported from BabtecQube. This means that when exchanging the 8D report between two BabtecQ systems, both the customer and supplier responsibilities in connection with this action are visible.
- **Preventive actions in 8D reports** can be synchronized as "Open", "Completed" or "Inspected" via BabtecQube between the supplier and customer BabtecQ systems. Suppliers who work exclusively in BabtecQube can create preventive actions as "Open" or "Completed" (inspected).
- For responsible persons assigned in complaints or 8D reports, the **"Department" field is now also exchanged with the contact details.**
- **Plausibility check of the specified address** for "Send failure / 8D report": If the value for the "BabtecQube ID" is removed from the address, the corresponding field in the database is reset to NULL.

1.15.2 Share the complaint with the supplier

The following functional changes have been made in version 7.9 specifically for sharing a complaint with a supplier:

- When selecting suppliers, the list view of addresses shows whether or not a BabtecQube ID has been stored for the supplier.
- The process of **sharing failures with suppliers via the complaint and failure list** has been revised and simplified. Sharing is now done directly and no longer via a separate dialog. Validations are displayed in a dockable window. This also applies to sharing at error level. You can see from the function call whether the failure is being shared with the supplier for the first time or again.
- The process of **stop sharing a failure with the supplier** has also been simplified in the same way.
- In order for a failure to be synchronized with the BabtecQube, the complaint must be exited. You will be informed of this immediately when a failure is marked for sharing.

Here is an overview of the changes that affect data exchange:

- All 8D deadlines, the failure group incl. matchcode, the order quantity incl. unit, the standard unit fields (free text) instead of the QDX unit fields are now also sent.
- The fields name, position, department, telephone, mobile and e-mail are transmitted for the contact person.

- For multilingual fields, the communication language of the selected supplier address is used. If not defined, the system language is used.
- In addition, the validations for sharing failures have been reduced: The selection of a supplier contact is no longer necessary. Dependencies between the delivery bill and the delivery quantity are no longer inspected. Missing units only lead to a warning.

1.15.3 8D Report received from supplier

Here you will find an overview of the changes that affect the data exchange when importing an 8D report from BabtecQube into your BabtecQ system:

- D1: Import of the team roles "Sponsor" and "Contact person" as well as "Participation in the final meeting" (for D8 participants)
- D2: Import of the "Risk assessment started/updated" field
- D3: Import of the fields "Assigned is", "Assigned until", "Completed on" ("Completed on" in the "Complete" task)
- D4: Import of "Cause group", "Cause type", "Verification by", "Verification on", "Result/method/report" and VDA reference
- D5 / D6 / D7: Import of the fields "Assigned is", "Assigned until", "Completed on" ("Completed on" in the "Done" task)
- D8: Import of participants in the final meeting, "Date of final meeting", "Result 8D assessment", "Assessment carried out by", "Assessment carried out on"
- The completion date is imported for each D-step.
- When importing the cause, the cause from the cause catalog of the receiving BabtecQ system is used if the match codes match, e.g. when exchanging between two BabtecQ clients via BabtecQube in the event that a cross-client cause group catalog is used.
- Import of canceled immediate actions now including "Canceled by" and "Canceled on"
- The name, position, department, telephone, mobile and e-mail are now imported for all team members or persons responsible for the supplier.

1.15.4 Complaints received from the customer

Here you will find an overview of the changes that affect the data exchange when importing a customer complaint from BabtecQube into your BabtecQ system:

- Receipt of all 8D deadlines
- Receipt of the failure group incl. matchcode
- When importing the failure, failures from the failure catalog of the receiving BabtecQ system are used if the match codes match, e.g. when exchanging between two BabtecQ clients via BabtecQube in the event that a cross-client failure group catalog is used.
- Import of the units into the standard unit fields (free text) instead of resolving the QDX unit fields
- Receipt of the order quantity incl. unit
- The name, position, department, telephone, mobile and e-mail are now imported for the customer's contact person.

1.15.5 Share 8D Report with the customer

The following functional changes have been made in version 7.9 specifically for sharing an 8D report with the customer:

- The process of **sharing 8D reports with customers via the complaint and error list** has been revised and simplified. Sharing is now done directly and no longer via a separate dialog. Validations are displayed in a dockable window. This also applies to **sharing at error level**. You can see from the function call whether the 8D report is being shared with the customer for the first time or again.
- In order for an 8D report to be synchronized with the BabtecQube, the complaint must be exited. You will be informed of this immediately when an **8D report is marked for sharing**.
- The **"Share 8D report" function call** is now also available in the **8D "Problem resolution"** view of an open customer complaint, below the D8 step - in the event that this customer complaint was received from BabtecQube.

Here is an overview of the changes that affect data exchange:

- D1: Dispatch of the team roles "Sponsor" and "Contact person" as well as "Participation in the final meeting" (for D8 participants)
- D2: Dispatch of the "Risk assessment started/updated" field
- D3: Sending the fields "Assigned is", "Assigned until", "Completed on" ("Completed on" in the "Complete" task)
- D4: Dispatch of the "Cause group" incl. matchcode, "Cause type", "Verification by", "Verification on", "Result/method/report" and VDA reference

- D5 / D6 / D7: Sending the fields "Assigned is", "Assigned until", "Completed on" ("Completed on" in the "Done" task)
- D8: Dispatch of participants in the final meeting, "Date of final meeting", "Result 8D assessment", "Assessment carried out by", "Assessment carried out on"
- The completion date is sent for each D-step.
- Dispatch of suspended immediate actions now incl. "Suspended by", "Suspended on"
- The name, position, department, telephone, mobile and e-mail are transmitted for all team members and responsibilities
- For multilingual fields, the communication language of the selected supplier address is used. If not defined, the system language is used.
- In addition, the validations for sharing the 8D report have been reduced - only the following technical validations are carried out:
 - D1: A team champion must be determined.
 - D2: A status must be selected for the "Authorized" field (error level).
 - D3: The immediate action must be Done or Inspected.
 - D5: The planned corrective action must have a date in the "Ordered by" field.
 - D6: The corrective action implemented must be Completed or Inspected.
 - D7: The preventive action must have a date in the "Assigned to" field.

1.15.6 Selection list for addresses

Two address fields are available in the process data of a complaint ("ADR1" and "ADR2"), the use of which is defined in the selected complaint type. If the complaint is to be shared with the supplier, an address (supplier) must be specified that has a valid company account in BabtecQube.

If the Babtec.Konnector/REK is licensed in your BabtecQ system, an extended selection list of addresses is available from version 7.9. The additional columns "BabtecQube business partner" and "Company account ID (BabtecQube ID)" show you immediately whether you can currently exchange complaint data with the supplier via BabtecQube. In addition, these two fields have been provided as criteria in the filter dialog of the selection list.

Please note: The extended selection list for addresses is also used in the following other modules, provided that the corresponding Babtec Connectors are licensed:

- "Tasks" module: in the "Business partner" field (dialog, filter in the list view)
- Module "Actions": in the field "Business partner" (dialog, filter in the list view)
- Inspection stations" catalog: BabtecQube receiver" field (dialog, filter in the "BabtecQube inspection stations" list view)
- "Orders" module: in the "Business partner" field (filter in the "BabtecQube operations" list view)

1.15.7 User Rights

For the "Complaints" module, version 7.9 introduces the new right "**Share own complaints and 8D reports with business partners**".

This right can now be used to determine who can use the BabtecQube

- in the event of a supplier complaint, failure with the supplier or
- share 8D reports with the customer in the event of a customer complaint and
- may cancel the sharing again.

1.15.8 Use of User Contacts

When processing complaints, there are a number of work steps in which those responsible must be determined and documented or in which it is recorded who has recorded certain data or made decisions.

For reasons of consistency, "User contact" is now used instead of "User short name" in the following cases:

- D4, Cause: "Verification by" field
- D5, D6, Cancel immediate action: "Cancelled by" field
- D8, 8D assessment: "Performed by" field

1.16 Drawings | CAD Integration

1.16.1 Drawing dimension comparison

Various list views are available for the individual processing steps when comparing drawing dimensions. You can now also make the **usual personal settings** here, such as sorting column contents, showing or hiding, moving columns and individually setting the column widths. The last settings used are also saved here on a user-specific basis so that they can be used again directly the next time the drawing dimensions are compared.

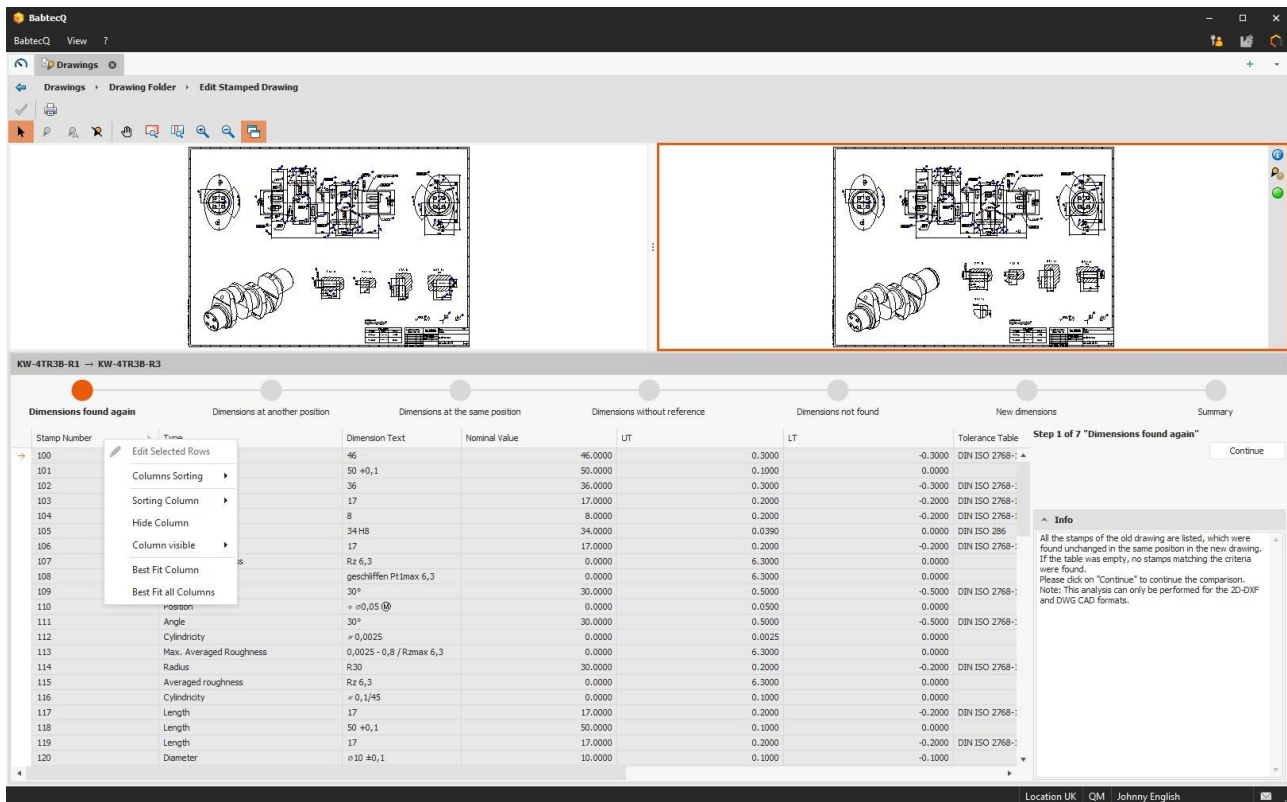


Fig.: New functions in the context menu for personal settings in the available list views

1.16.2 Stamping drawings: Optimizations for recognition

In version 7.9, we have continued to work on optimizing the recognition of drawing dimensions for you - partly taking into account CAD system-specific "peculiarities":

- The detection of combined shape and position tolerances has been optimized.
- The recognition of rectangles has been improved by optimizing the geometry search.
- The search radius of graphical elements around dimensions, e.g. for theoretical dimensions (box) or item numbers (circle), can be configured if required - please get in touch with your contact at Babtec.
- In a few cases, critical dimensions were not recognized correctly. The routine for detecting critical dimensions has therefore been optimized. Critical dimensions are now automatically transferred to the list of characteristics when stamping, eliminating the need for manual stamping in future.
- Optimization for CATIA: When importing the drawing, the blocks are marked so that they are ignored in a multiple selection (for stamping). If the blocks / texts are selected individually, they can still be stamped. The behavior has been optimized and can be made available as an option - please contact your Babtec contact person if required.
- The display of drawings from CADdy++ has been improved through various optimizations.

2 News in BabtecQ Go

In the following chapters you will learn more about the new features that are available for the browser-based BabtecQ Go modules in Release 7.9.

2.1 News on operation

2.1.1 Notes

A URL with an additional name can now be inserted in note fields using the "Add link" function. The easy-to-understand name (compared to the URL) is then displayed in the text as an executable link.

With "Paste" (CTRL + v) a previously copied text can be pasted - **existing line breaks** are now retained.

In addition, the selection of the font color has been simplified. **Defined standard colors** are now available for selection.

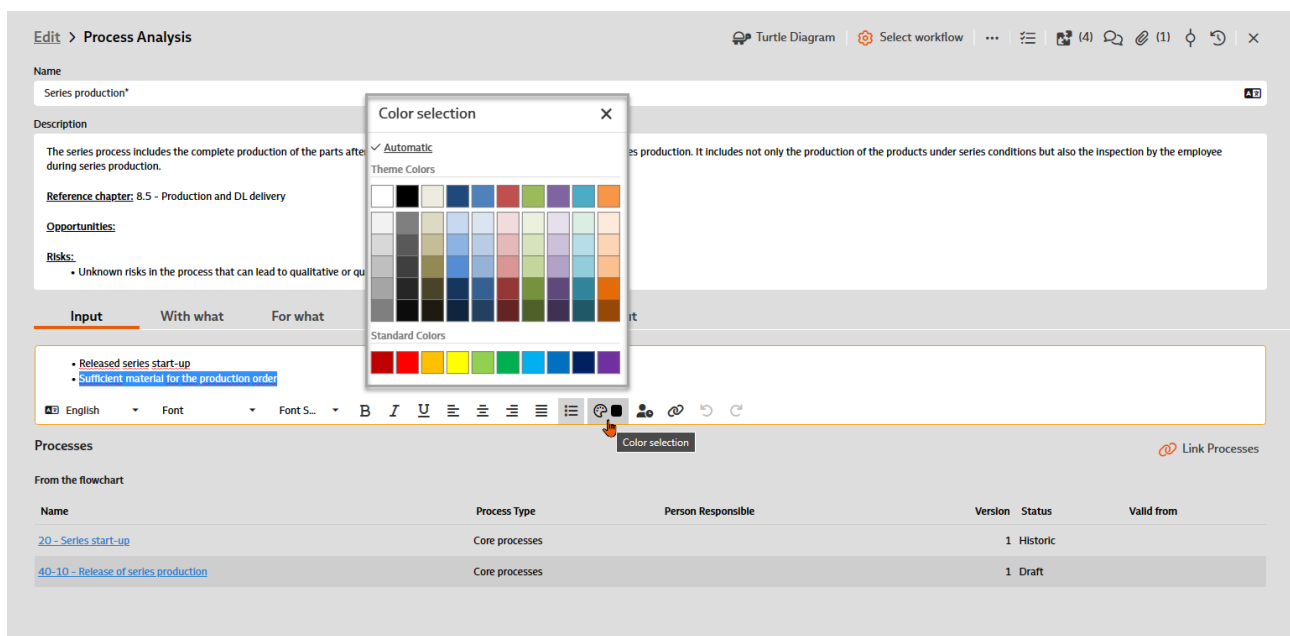
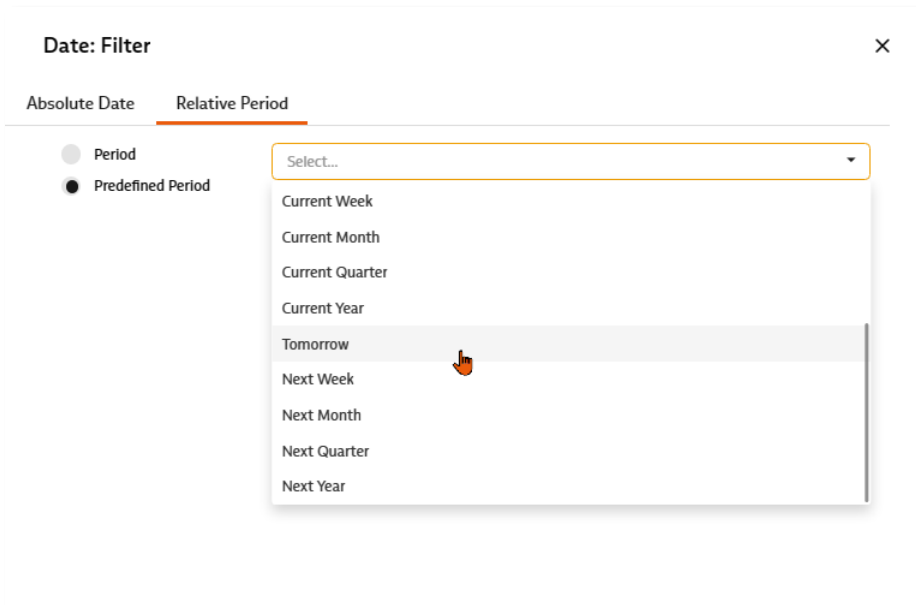


Fig.: Note in the "Processes" module - new font color selection

2.1.2 Filter: Time Periods

In filter dialogs, the specification of the time period has now been extended to include **predefined future values, such as tomorrow, next month**, etc. Even if you want to select an individual time range, you can now specify the **next 5 days, for example**.



*Fig.: Time periods in the filter
- now also predefined for the
future*

2.2 New: Requirements Management

Do you know this too? The requirements from standards and laws as well as from demanding customers and increasingly complex products have changed and **multiplied** over time. These include requirements for quality, environmental and occupational health and safety management, IT security and product liability.

Dealing with all these requirements relevant to your company therefore often becomes an **increasing challenge**: Are all the requirements known? In which business processes are these requirements to be taken into account? Since when have they been binding for the company, to what extent are they fulfilled and are all those involved familiar with the rules and specifications? If the expectations of your interested parties and agreed requirements are not (sufficiently) met or are not even known, this can pose a considerable risk to the company.

With the **new "Requirements" module** in the browser-based BabtecQ Go front end, you will soon have an **overview of all requirements - transparently and without stress**.

2.2.1 Manage documents with requirements

The requirements of your interested parties are often sent to you in the form of documents - these are standards for management systems, including customer-specific requirements (e.g. CSR for IATF 16949), industry-specific guidelines, legal bulletins or contract documents.

In the **"Requirements" module**, you therefore manage **the respective source** from which the requirements originate - i.e. the **documents** in their currently published issue status. Record from when or since when the document is **valid or binding** for your company.

In addition, you can also manage the individual **requirements identified** from the documents that are relevant to your company. If you also save the original document for the source (in Word or PDF format), you can view it again at any time in the context of a requirement.

Number	Name	Edition	Person Responsible	Valid from	Labels
AIAG/VDA FMEA 2019	FMEA Manual	2019	Peter Fröhlich	01/07/2021	Industry Guideline, QMS
ALV CSR 2021	Customer specific requirements	27.04.2021, Version 4.0	Peter Fröhlich	01/09/2021	ALV, Customer (CSR), QMS
AUTOMOTE 2020 - 2022	AUTOMOTE Special Terms	11-2019, 2022	Peter Fröhlich	01/01/2020	AUTOMOTE, Customer (CSR), QMS
BGBI LKSG 2021	Act on Corporate Due Diligence Obligations in Supply Chains	1-46 (2021)	Ryan Bergmann		Law
CAR-10 2020	10. Capability of measurement and testing processes	2020-04-06	Peter Fröhlich	01/07/2020	CAR, Customer (CSR), QMS
CAR-14 2020	14. FMEA	2020-04-06	Peter Fröhlich	01/07/2020	CAR, Customer (CSR), QMS
CAR-7 2021	7. Statistical Process Control	2021-02-10	Peter Fröhlich	01/06/2021	CAR, Customer (CSR), QMS
CAR-8 2020	8. Uncertainty of Measurement	2020-04-06	Peter Fröhlich	01/09/2020	CAR, Customer (CSR), QMS
CAR-9 2020	9. Machine and Process Capability	2020-04-06	Peter Fröhlich	01/07/2020	CAR, Customer (CSR), QMS
DIN EN ISO 14001:2015	Environmental management systems - Requirements with guidance for use	11-2015	Robert Koch	01/01/2017	Standard, EMS
DIN EN ISO 50001:2018	Energy management systems - Requirements with guidance for use	12-2018	Helmut Wagner	01/05/2018	Standard, EnMS
DIN EN ISO 9001:2015	Quality management systems - Requirements	11-2015	Peter Fröhlich	01/07/2016	Standard, QMS
DIN EN ISO/IEC 27001:20...	Information security management systems - Requirements	06-2017	Peter Jung	01/07/2016	Standard, IT
DIN ISO 45001:2018	Occupational health and safety management systems - Requirements and guidan...	06-2018	Vollmer, Uwe	01/01/2019	Standard, Occupational Safety
IATF 16949:2016	Quality managements systems - Standard of the automotive industry	1. Oktober 2016 (1. Ausgabe)	Peter Fröhlich	01/01/2018	ALV, AUTOMOTE, CAR, WW, Standard, ...
ProdHaftG:1989 - 2017	Product Liability Act	1989, zuletzt aktualisiert: 2017	Martin Krom	01/01/1990	Law
VDA - BM 2020	Process description Special Characteristics (German)	04-2020 (2)	Peter Fröhlich	01/01/2020	Industry Guideline, QMS

Fig.: Documents with requirements

2.2.2 Identify, record and analyze requirements

From the stored source document, you record all identified requirements that **are relevant to your company**. You save each requirement with a number and name; you can copy and paste the original text from the document if required. You also save the **reference to the relevant page** in the original document, which allows you to easily find the requirement later in the context of the original document.

The screenshot displays a 'Requirements' list on the left and a 'Source Document' (PDF) on the right. The requirements list includes:

- 1 (4.4.1.2) - Product Safety and Conformity Representative (PSCR): Status: **Partially Fulfilled** (15/12/2023). Description: The supplier has to nominate a Product Safety and Conformity Representative (PSCR) in the B2B Portal and to confirm or update... [Show whole text](#)
- 2 (4.4.1.2) - Release of D- and P-FMEAs: Status: **Completely Fulfilled**. Description: The supplier does not require participation in the release of D- and P-FMEAs that contain critical characteristics concerning product... [Show whole text](#)
- 3 (8.1.1) - Logistical requirements for suppliers of the B2B Portal: Status: **Partially Fulfilled** (15/12/2023). Description: [Show whole text](#)
- 4 (8.5.4.1 - Packaging material of Functional areas, Logistics, Packaging): Status: **Completely Fulfilled**. Description: Published in B2B Portal of the [B2B Portal](#). [Show whole text](#)
- 5 (8.6.2) - Requalification of product and process at suppliers: Status: **Not Fulfilled** (In Analysis). Description: Group Standard 90018-1 and Group Standard 90019-2. [Show whole text](#)
- 6 (8.7.1.6) - Self-reporting of qualitative deviations: Status: **Completely Fulfilled**. Description: To submit a voluntary disclosure regarding qualitative deviations, all relevant information must be distributed to the... [Show whole text](#)
- 7 (10.2.5, 10.2.6) - Defective part analysis; findings of field complaints: Status: **Not Fulfilled**. Description: [Show whole text](#)

The 'Source Document' (PDF) on the right shows the original document with a search bar and a page number of 1 of 10. It contains text in German, including 'Kundenspezifische Anforderungen der IATF 16949:2016' and 'Spezifische Anforderungen der IATF 16949:2016'.

Fig.: Example of a document with identified and analyzed requirements, including reference to the page in the original document (designed as a link)

In many cases, **analyzing** the recorded requirements is an interdisciplinary process, i.e. you need the knowledge and assessment of various technical and process experts in your company. **Involve all the people in the team** that you need to analyze and interpret a requirement. Use the **comment section** for communication about the requirement to be evaluated and record the challenges discussed and decisions made there. As usual, this module also offers the option of creating **tasks** that arise in the context of a requirement - forwarding these to the responsible persons and monitoring them in terms of deadlines with the help of the central task management of the Babtec software. Additional information related to a requirement (files or URLs) can be stored as an attachment to a requirement.

Ultimately, each recorded requirement is marked with both a **processing status** and the current **degree of fulfillment**. To make it as easy as possible to find the requirement again later, you can use individually defined **labels for identification** - for example for the type (standard, law, CSR, etc.) or for the reference to the "Harmonized Structure" of the management system standards or, in the case of a customer-specific requirement, for the assignment of the customer.

2.2.3 Manage requirements and research

With the help of flexible filter options, you can **create suitable views and save them** for reuse to keep an overview of your requirements at all times. In this way, you can quickly find out whether, for example, the requirements that "come your way" as part of a new customer project are already known and what the status of their implementation and fulfillment is.

Type	Number	Name	Edition	Status	Fulfillment Level	Person Responsible	Valid from	Due Date	Labels
Source	IATF 16949:2016	Quality managements systems - Standard of the automotive ...	1. Oktober 2016 ...			Peter Fröhlich	01/01/2018		ALV, AUTOMOTE, CAI
Source	ALV CSR 2021	Customer specific requirements	27.04.2021, Ver...			Peter Fröhlich	01/09/2021		ALV, Customer (CSR)
Requirement	1 (4.4.1.2)	Product Safety and Conformity Representative (PSCR)		Implemented	Partially Fulfilled	Peter Fröhlich		15/12/2023	ALV
Requirement	2 (4.4.1.2)	Release of D- and P-FMEAs		Implemented	Completely Fulfilled	Peter Fröhlich			ALV
Requirement	3 (8.1.1)	Logistical requirements for suppliers of the ALV Group		Implemented	Partially Fulfilled	Peter Fröhlich		15/12/2023	ALV
Requirement	4 (8.5.4.1)	Packaging manual of ALV Group		Implemented	Completely Fulfilled	Peter Fröhlich			ALV
Requirement	5 (8.6.2)	Requalification of product and process at suppliers		In Analyse	Not Fulfilled	Peter Fröhlich			ALV
Requirement	6 (8.7.1.6)	Self-reporting of qualitative deviations		Implemented	Completely Fulfilled	Peter Fröhlich			ALV
Requirement	7 (10.2.5, 10.2.6)	Defective part analysis; findings of field complaints		In Implementation	Partially Fulfilled	Peter Fröhlich			ALV

Fig.: Example of an overview of all known requirements of a customer, filtered out with the help of a label

You can also use the flexibly adjustable views to inform those responsible about new requirements or to keep an eye on the progress of the evaluation and implementation of requirements as well as deadlines.

Both source documents and the individual requirements can be **linked to each other** in order to map **interrelationships or interactions** or to **use synergies and existing experience** in the implementation and fulfillment of requirements. For example, to reduce the complexity of all requirements for your management system, the same or at least similar requirements from the various management system standards for quality, environment or occupational health and safety can be **linked together as related requirements** on

the basis of the "Harmonized Structure". Or if a new version of a requirements document is published, you can link the **new version** as the successor to the previously valid document.

Use the available link types to model your requirements structure according to your needs - because all existing links are clearly arranged starting from a source document or requirement. So if you are **looking for information** on a specific requirement, all information on the linked requirements is just a click away.

2.2.4 Integration of requirements in BabtecQ

As part of the requirements analysis, it is not only decided whether a requirement is relevant for the company and to what extent this is the case - it is also identified on which business processes a (new) requirement has an impact or for which **business processes** a requirement is relevant. Therefore, each requirement can be linked to one or more processes that are available in the "**Processes**" module. There, in turn, it can be seen for each process owner(s) of a process which requirements need to be taken into account. If the respective process owners also have (at least read) access authorizations for the "**Requirements**" module, they can obtain comprehensive information about the requirements.

The overview of the linked processes shows for which process this requirement has already been confirmed and for which it has not yet been confirmed.

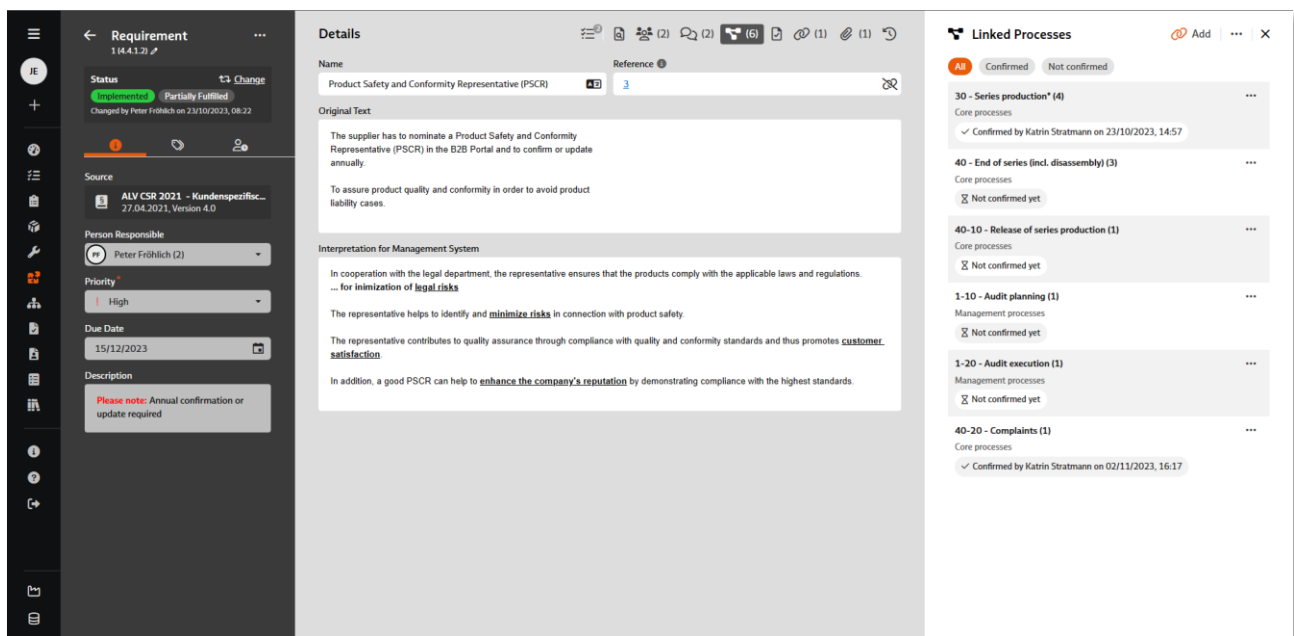


Fig.: Example of a requirement with an overview of the linked processes in which this requirement is relevant

To fulfill the requirements, **specifications and rules** are drawn up, which you include in the process descriptions and define in **applicable (specification) documents** in the form of instructions or in **digital checklists as step-by-step instructions**. Analogous to the overview of the linked processes, each requirement therefore also contains an **overview of the linked documents** from the document control system. In the "**Documents**" module, document managers can see for which requirements the document contains or should contain specifications and rules.

The **integration of the modules for processes, guided documents and checklists** on the one hand and the use of the browser-based front end BabtecQ Go on the other create the prerequisites for really familiarizing every process participant in your company with all the necessary information relating to the activities to be carried out. Process descriptions, instructions and fillable checklists are easily accessible for everyone, they guide people, support them in the performance of their activities and thus **ensure process reliability** and ultimately also **the fulfillment of the requirements** of your interested parties.

2.3 Checklists

Commissioning, process sequences, assembly instructions, acceptances or shift handovers: There are certainly many applications in your company where checklists "in paper form" already provide support today.

Since version 7.8, you can easily digitize, share and use all your checklists in the browser-based BabtecQ Go - in the truest sense of the word. The intuitive modular system offers maximum freedom for the individual structure of checklists. This allows you **to standardize processes and create transparency** for your employees. All the knowledge gained from your records flows reliably into your **continuous improvement process (CIP)**.

The **module for digital checklists** is the **logical addition** to our modules for process management and document control. It enables you not only to reliably communicate specifications from the process or management level to all employees, but also to guide them step by step through the processes. These transparent step-by-step instructions reduce complexity and **ensure better comprehensibility and high process reliability**. The use of Babtec checklists therefore also contributes to the **effectiveness of your quality management system or integrated management system**.

2.3.1 Integration in BabtecQ modules

In most modules, not only files or links (URLs) to external information that are important in the context of the respective Babtec data record (e.g. complaint or action) can be stored in the **"Documents" tab - information or data records from other modules can also be linked here**.

As of version 7.9, you can now also link **fillable or already used and recorded checklists** that are in the context of the Babtec data set.

An example: You would like to regularly check whether your 8D process is effective based on processed customer complaints. To do this, you use a digital Babtec checklist, which you can then link to the complaint process in question as a verification document in the "Complaints" module.

Alternatively, it was already possible to link a **default document of the type "Checklist"** to the Babtec data record in question on the "Documents" tab ("My documents" storage location). From version 7.9, you can now use this default document to create a fillable checklist using the new **"Use checklist and link directly" function**. This new fillable checklist is then linked directly in the currently open document tab and is of course also available in the "Checklists" module.

Above all, however, the **checklist** can be used immediately **"without detours"** to carry out the upcoming activities. Simply double-click or use the familiar "View file contents" function to open the newly created checklist, log in to BabtecQ Go in the browser and off you go - provided you have the appropriate user rights for checklists.

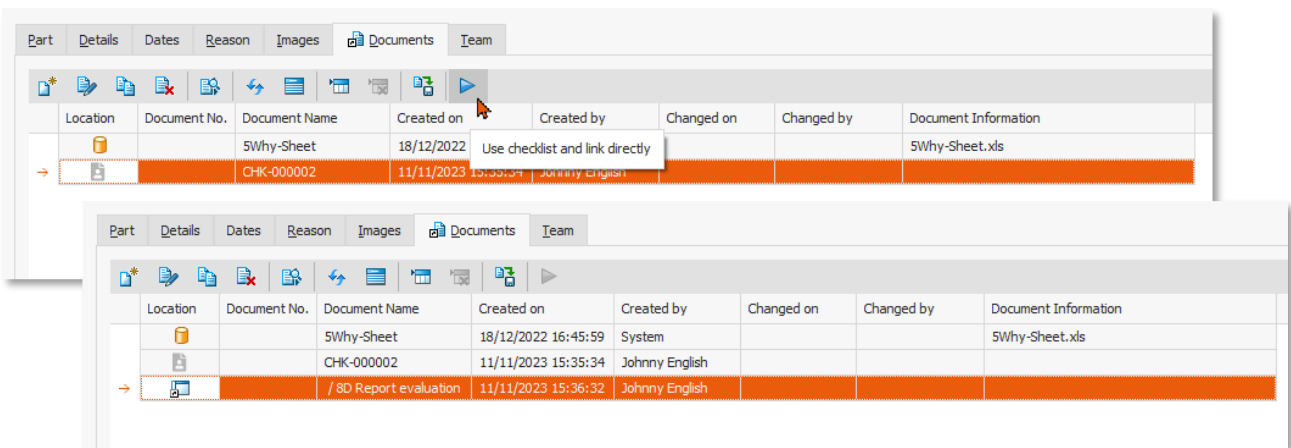


Fig.: "Documents" tab - New function (1) for creating the fillable checklist based on the checklist document and saving the module link in the same document tab (2)

2.3.2 Dashboard: List view with checklists

As of version 7.9.1, the saved views from the "Checklists" module can now also be used in the "List view" tile and used in your dashboards in both BabtecQ and BabtecQ Go.

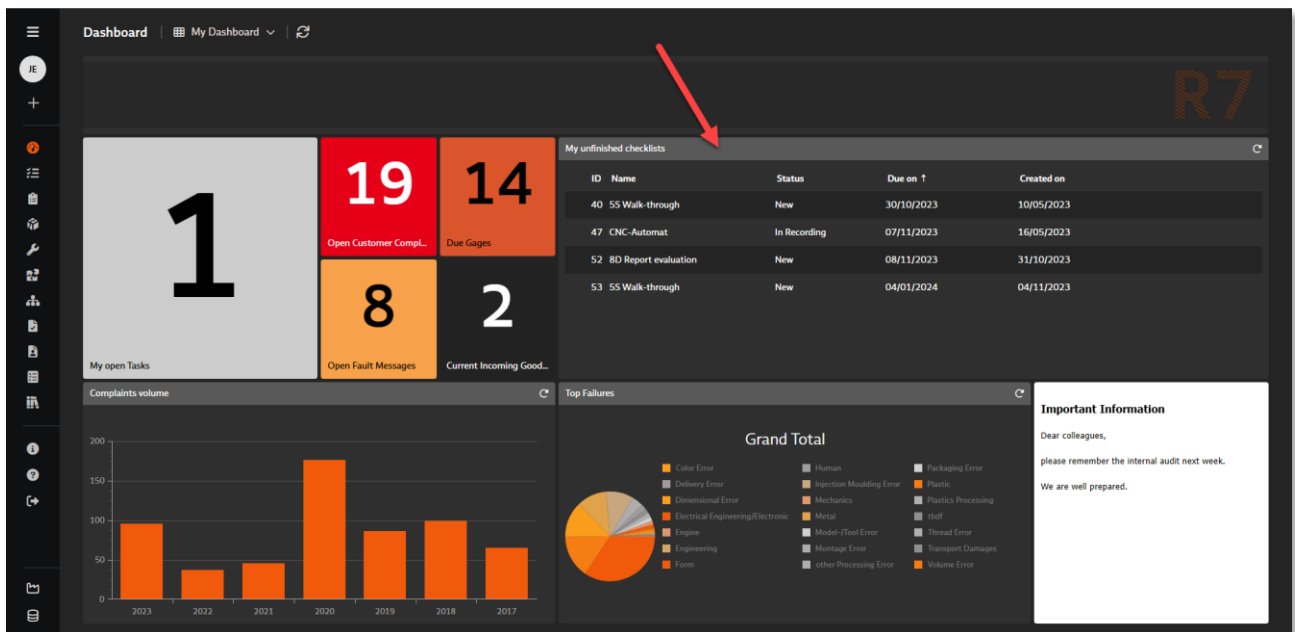


Fig.: Using a saved view for checklists in a tile for a dashboard in BabtecQ Go

2.3.3 List view: Decision

The "Decision" column is now also offered in the list views. When creating individual views, the **decision** can therefore also be specified **as a filter criterion**. This means that you can now easily provide information in a dashboard, e.g. for those responsible, in which used or completed checklists **deviations were identified** that led to the decision "Not accepted".

ID	Name	Status	Due on	Assigned to	Progress	Decision	Origin Number	Created on	Created by	Modified on	Modified by	Finished on
2	55 Walk-through	Completed		Katrin Stratmann (1)	<div style="width: 100%;"></div>		CHK-000001	28/04/2023	Katrin Stratmann (1)	04/05/2023	Katrin Stratmann (1)	28/04/2023
3	55 Walk-through	Completed		Katrin Stratmann (1)	<div style="width: 100%;"></div>		CHK-000001	02/05/2023	Katrin Stratmann (1)	04/05/2023	Katrin Stratmann (1)	02/05/2023
39	55 Walk-through	Completed		Stratmann, Katrin (KS...	<div style="width: 100%;"></div>		CHK-000001	10/05/2023	Stratmann, Katrin (KS...			10/05/2023
40	55 Walk-through	New	11 days ago	Katrin Stratmann (1)	<div style="width: 0%;"></div>		CHK-000001	10/05/2023	Stratmann, Katrin (KS...	07/11/2023	Katrin Stratmann (1)	
41	8D Report evaluatio...	Completed		Katrin Stratmann (1)	<div style="width: 100%;"></div>		CHK-000002	11/05/2023	Katrin Stratmann (1)			11/05/2023
42	55 Walk-through	Completed		Johnny English (ENG)	<div style="width: 100%;"></div>		CHK-000001	11/05/2023	Johnny English (ENG)			11/05/2023
46	#CNC-Automat	Completed		Katrin Stratmann (1)	<div style="width: 100%;"></div>	Accepted under Reserve	CHK-000010	16/05/2023	Katrin Stratmann (1)	10/11/2023	Johnny English (ENG)	16/05/2023
47	#CNC-Automat	In Record...	3 days ago	Katrin Stratmann (1)	<div style="width: 0%;"></div>		CHK-000010	16/05/2023	Katrin Stratmann (1)	10/11/2023	Katrin Stratmann (1)	
48	#CNC-Automat	Completed		Katrin Stratmann (1)	<div style="width: 100%;"></div>	Accepted under Reserve	CHK-000010	16/05/2023	Katrin Stratmann (1)	10/11/2023	Johnny English (ENG)	16/05/2023
49	#CNC-Automat	Completed		Katrin Stratmann (1)	<div style="width: 100%;"></div>	Accepted under Reserve	CHK-000010	16/05/2023	Katrin Stratmann (1)	10/11/2023	Johnny English (ENG)	16/05/2023
50	#CNC-Automat	Completed		Stratmann, Katrin (KS...	<div style="width: 100%;"></div>	Accepted under Reserve	CHK-000010	17/05/2023	Stratmann, Katrin (KS...	10/11/2023	Johnny English (ENG)	17/05/2023
51	#CNC-Automat	Completed		Katrin Stratmann (1)	<div style="width: 100%;"></div>	Accepted under Reserve	CHK-000010	17/05/2023	Katrin Stratmann (1)	10/11/2023	Johnny English (ENG)	17/05/2023
52	8D Report evaluatio...	New	2 days ago	Katrin Stratmann (1)	<div style="width: 0%;"></div>		CHK-000002	31/10/2023	Katrin Stratmann (1)	07/11/2023	Katrin Stratmann (1)	
53	55 Walk-through	New	in 2 months	Katrin Stratmann (1)	<div style="width: 0%;"></div>		CHK-000001	04/11/2023	Katrin Stratmann (1)	07/11/2023	Katrin Stratmann (1)	

Fig.: List view with checklists - new "Decision" column

2.3.4 Create and record checklist

The "Checklists" module itself now also has a function for creating a new checklist based on a published checklist document.

During the recording of a checklist, the decision for a module can now be changed even if comments, images, failures or actions for the module have already been recorded.

And if a failure has to be documented due to a deviation, a new "quick entry" for the number of failures is available for you from version 7.9.

? Is the machine set up and aligned correctly?*

✓ Yes

⊘ No

Failure*

+ Add Failure

⚡ Foundation • Slope exceeded Amount − 3x + 🗑️

The point foundations have a slope of 1.5°. The maximum permissible inclination is 0.5°.

Fig.: New entry for the number of failures

2.3.5 Checklist Sets

From version 7.9, you can combine several checklists into one set. This is why you will now find **two views** in the "Checklists" module:

- Checklists and
- Checklist Sets

A set is suitable if various work steps are required to carry out an activity, each of which already has its own specification document in the form of a checklist. The set allows you to **bundle all the checklists required** for this activity, **schedule their execution** and **create** the individual fillable checklists **at the touch of a button**.

Checklist sets can also be used in particular when several independent checklists are used for one activity. This is the case with assembly orders, for example, if a system consists of individual components and there are separate instructions for each individual component. Depending on the specification of the system, you then assign exactly the checklists that are required in the individual case to the set. When creating a set, the latest version of each assigned checklist is always used - this ensures that your employees always work according to the latest specifications.

In any case, with a set you can easily keep **track of the processing status** of all associated checklists. All checklists that have been compiled in sets can also be found in the "Checklists" view.

For users, everything remains the same - regardless of whether a single checklist or a checklist from a set is to be entered.

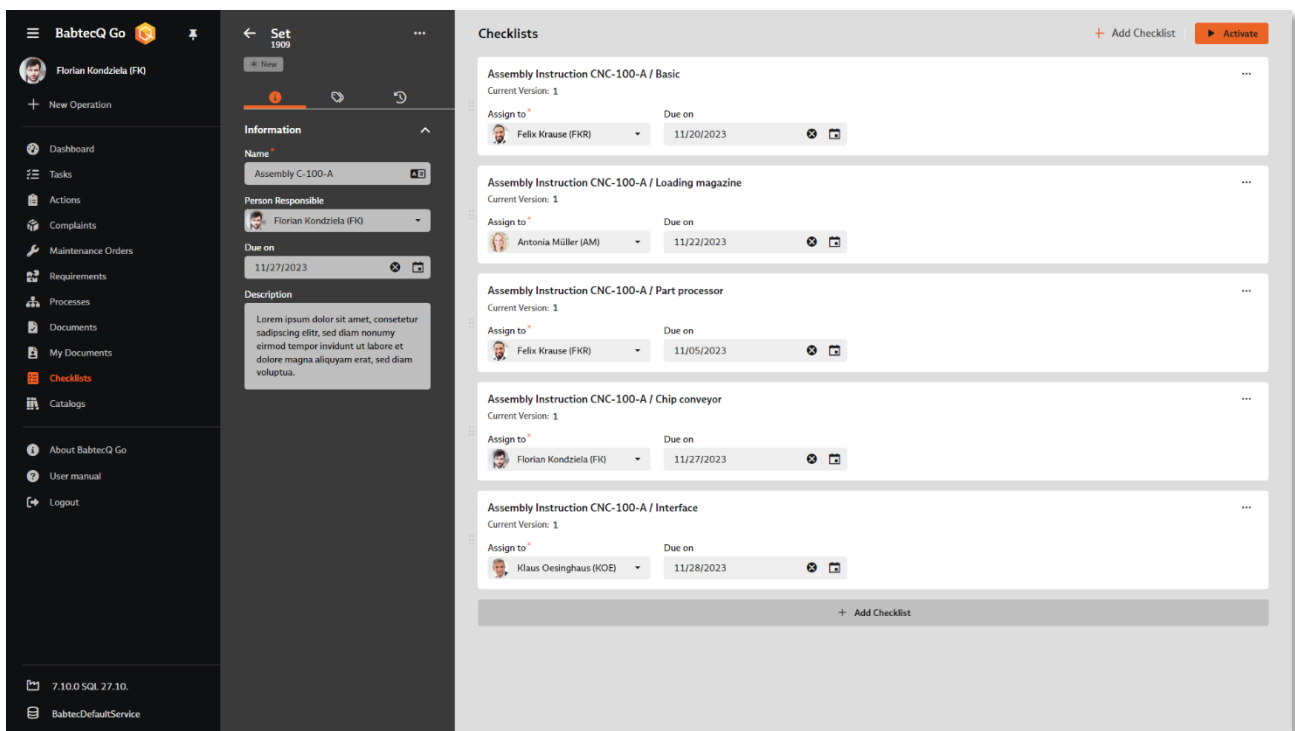


Fig.: Compilation of individual checklists into a set

2.3.6 Triggering actions retrospectively

Depending on the configuration of the module, an action can or must be triggered if a deviation is detected during the recording process. In addition, **further actions** can now be **triggered retrospectively** if required - regardless of whether the addition of actions has been defined as mandatory or not. This affects the following modules:

- Question
- Rating
- Measurement
- Simple selection
- Multiple selection
- Rating with points

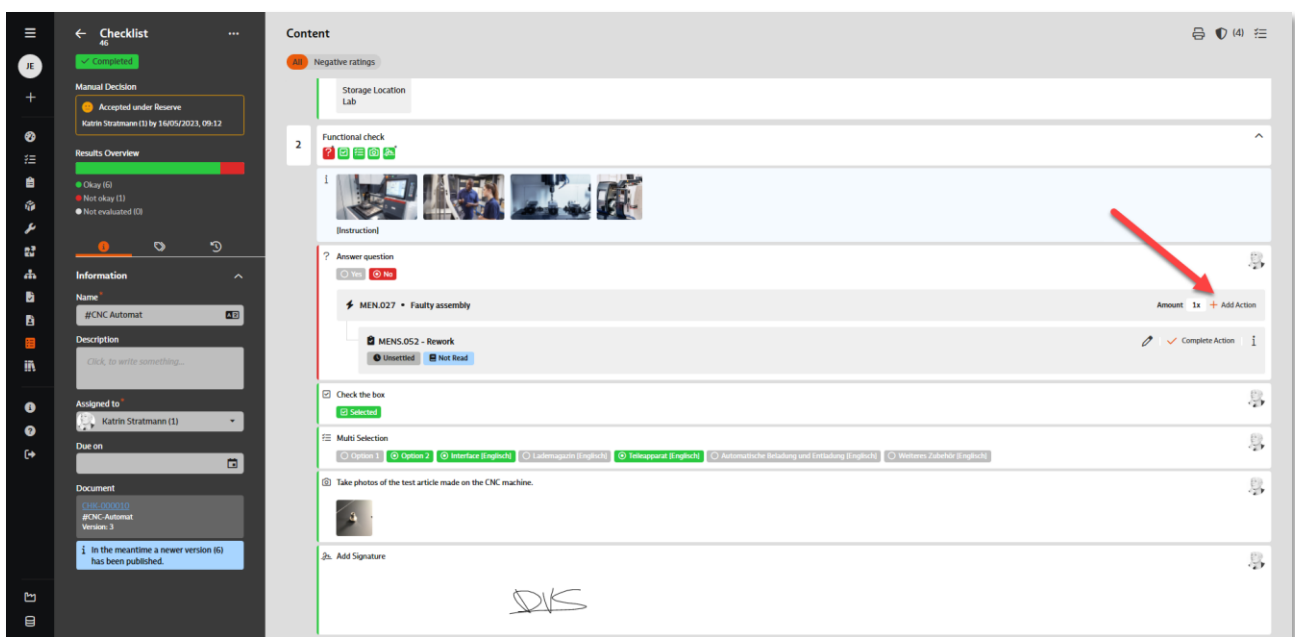


Fig.: Add action subsequently

2.3.7 Visualization of the due date

You can define the latest date by which the persons involved must submit a reading confirmation for a new document or when a checklist should be entered or a set of checklists should be processed. When a reading confirmation or the entry of a checklist is due or was due is also visualized in colour. If you have already submitted the reading confirmation or have already entered and completed the checklist, an existing appointment is now displayed without color coding.

ID	Name	Status	Due on ↓	Progress	Created on	Modified on	Modified by	Finished on	Finished by
53	55 Walk-through	New	in 2 months	<div style="width: 0%;"></div>	04/11/2023	07/11/2023	Katrin Stratmann (1)		
52	8D Report evaluation	New	2 days ago	<div style="width: 0%;"></div>	31/10/2023	07/11/2023	Katrin Stratmann (1)		
47	CNC-Automat	In Recording	3 days ago	<div style="width: 20%;"></div>	16/05/2023	10/11/2023	Katrin Stratmann (1)		
40	55 Walk-through	New	11 days ago	<div style="width: 0%;"></div>	10/05/2023	07/11/2023	Katrin Stratmann (1)		
2	55 Walk-through	Completed		<div style="width: 100%;"></div>	28/04/2023	04/05/2023	Katrin Stratmann (1)	28/04/2023	Katrin Stratmann (1)
3	55 Walk-through	Completed		<div style="width: 100%;"></div>	02/05/2023	04/05/2023	Katrin Stratmann (1)	02/05/2023	Katrin Stratmann (1)
41	8D Report evaluation	Completed		<div style="width: 100%;"></div>	11/05/2023			11/05/2023	Katrin Stratmann (1)
46	#CNC Automat	Completed		<div style="width: 100%;"></div>	16/05/2023	10/11/2023	Johnny English (ENG)	16/05/2023	Katrin Stratmann (1)
48	#CNC-Automat	Completed		<div style="width: 100%;"></div>	16/05/2023	10/11/2023	Johnny English (ENG)	16/05/2023	Katrin Stratmann (1)
49	#CNC-Automat	Completed		<div style="width: 100%;"></div>	16/05/2023	10/11/2023	Johnny English (ENG)	16/05/2023	Katrin Stratmann (1)
51	#CNC-Automat	Completed		<div style="width: 100%;"></div>	17/05/2023	10/11/2023	Johnny English (ENG)	17/05/2023	Stratmann, Katrin (KST)

Fig.: Coloured visualization of the due date - here in the list view with checklists

2.3.8 Report

You can now generate a report in PDF format for each checklist at the touch of a button. Depending on the processing status of the checklist, the report includes all instructions and records, including all documented tasks and actions.

BABTEC Checklist Report Date: 10/27/2023 Page: 2/3

Page 1: General

Step 1: Preparation

Enter machine ID / type
1900 / CNC
Recorded on 10/27/2023 1:39 PM by Florian Kondziela (FK)

Enter serial number
XWB/A350-LH
Recorded on 10/27/2023 1:39 PM by Florian Kondziela (FK)

Select location of the machine

Location No.	Location Name	Location Type
02	Montage (English)	Usage Site

Recorded on 10/27/2023 1:39 PM by Florian Kondziela (FK)

Add acceptance certificates from the manufacturer

Spezifikation.pdf
Florian Kondziela
10/27/2023 1:39 PM

Abnahme vor...
Florian Kondziela
10/27/2023 1:39 PM

Abnahme WAP...
Florian Kondziela
10/27/2023 1:39 PM

Recorded on 10/27/2023 1:39 PM by Florian Kondziela (FK)

Step 2: Function control

Instruction
Lorem ipsum dolor sit amet, consetetur elipscing elit. sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.

CNC-004.jpg
Florian Kondziela
27.10.2023 13:04

CNC-001.jpg
Florian Kondziela
27.10.2023 13:04

CNC-003.jpg
Florian Kondziela
27.10.2023 13:04

CNC-002.jpg
Florian Kondziela
27.10.2023 13:04

Is the machine set up and aligned correctly?
 Yes No

001.001 - Slope exceeded
Das Fundament hat eine Neigung von 1,5°. Die maximal zulässige Neigung beträgt 0,5°.

001.001 - Correct slope
The slope of the CNC machine must be compensated to <=0,5°.

Unsettled

Category	Action Type	Completion by	Due until	Verification by	To be verified until
<No Category>	Short Term	Florian Kondziela (FK)	11/1/2023 12:00 AM	Florian Linzenbach (FL)	11/3/2023 12:00 AM

Recorded on 10/27/2023 1:39 PM by Florian Kondziela (FK)

BABTEC Checklist Report Date: 10/27/2023 Page: 3/3

General function check carried out
 Selected
Recorded on 10/27/2023 1:43 PM by Florian Kondziela (FK)

Leak tightness of the machine tested
 Selected
Recorded on 10/27/2023 1:43 PM by Florian Kondziela (FK)

Function check of the individual components

- Chip conveyor
- Bar feed
- Interface
- Loading magazine
- Parts processor
- Automatic loading and unloading
- Other accessories

Recorded on 10/27/2023 1:43 PM by Florian Kondziela (FK)

Acknowledge function check

F. Kondziela

Signed by Florian Kondziela
Recorded on 10/27/2023 1:43 PM by Florian Kondziela (FK)

Fig.: New report in PDF format

2.3.9 User-defined fields

For **checklists** (metadata for CHK_INSTANCE) and **checklist sets** (metadata for CHK_ORDER), additional user-defined fields can now be used if required, which can be positioned and maintained in a suitable place in the **header data area** using the Layout Designer.

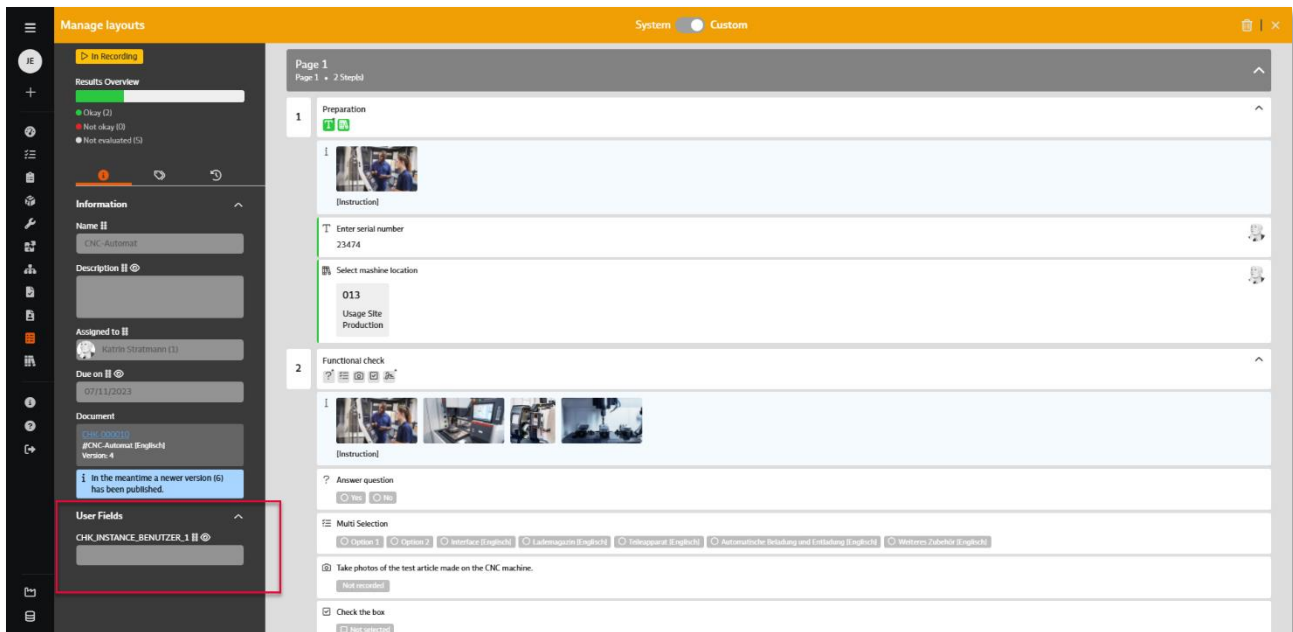


Fig.: User-defined field in the header data area of a checklist

2.3.10 Quality Cockpit key figures

In order to be well informed about the use of checklists in the future and to monitor the use of defined checklists in practice, you can use the following key figures from version 7.9:

- CL-001 for overdue checklists
- CL-002 for adherence to deadlines when processing checklists
- CL-003 for the average processing time of checklists
- CL-004 for the rate of canceled checklists

2.4 Dokumenten

2.4.1 Checklist: Brick "Instruction"

Formulated instructions can be supplemented with externally available information - files and **now also links (URLs)** can be added as attachments. This information is then also available to the user when entering the checklist.

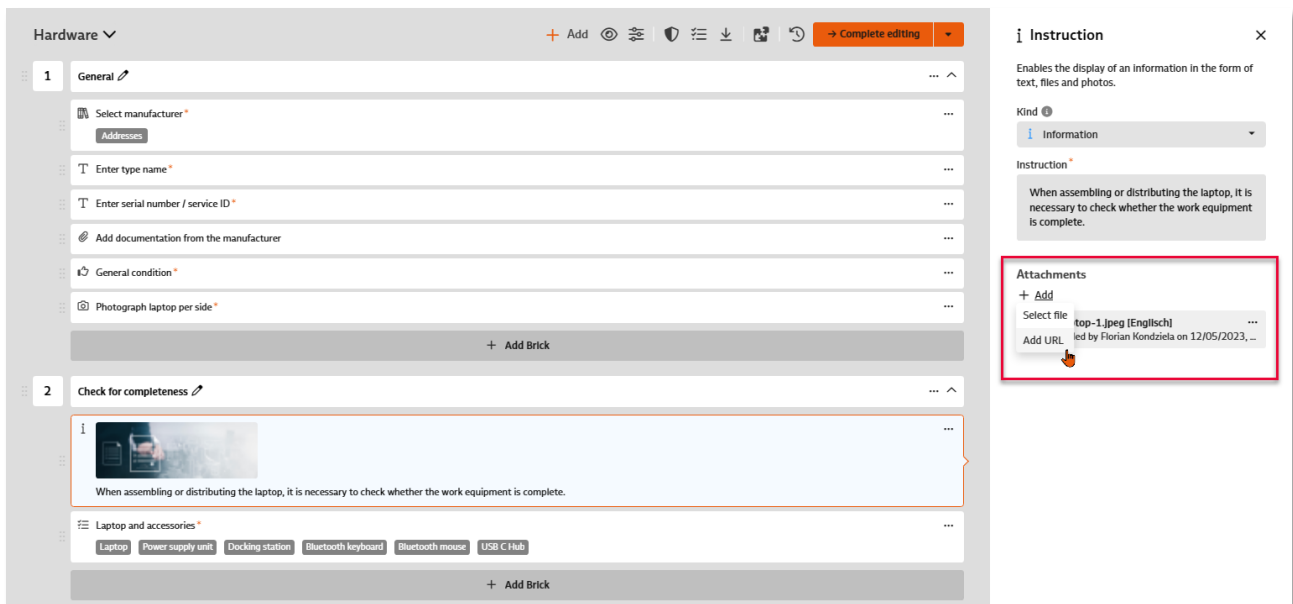


Fig.: "Instruction" module - Add URL as attachment

2.4.2 Checklist: Brick "Evaluation with points"

The new brick allows you to choose from three predefined ratings: "Accepted" (10 points), "Accepted with reservations" (5 points) and "Not accepted" (0 points). As with the quality modules already available, all configuration options (mandatory information, negative rating if skipped, enable comment, image, failure selection, action in the event of negative rating, branching) are available.

A degree of fulfillment can be calculated for the checklist based on the maximum achievable points and the points actually achieved. The calculation of the degree of fulfillment is linked to the decision of the checklist. In the configuration of the checklist document, an automatic decision can be determined that is calculated when the checklist is completed using the degree of fulfillment. Limit values can be defined for the degree of fulfillment from which the corresponding decisions "Accepted", "Accepted with reservation" or "Rejected" should be issued for the checklist. The degree of fulfillment is displayed together with the decision on the interface and in the report.

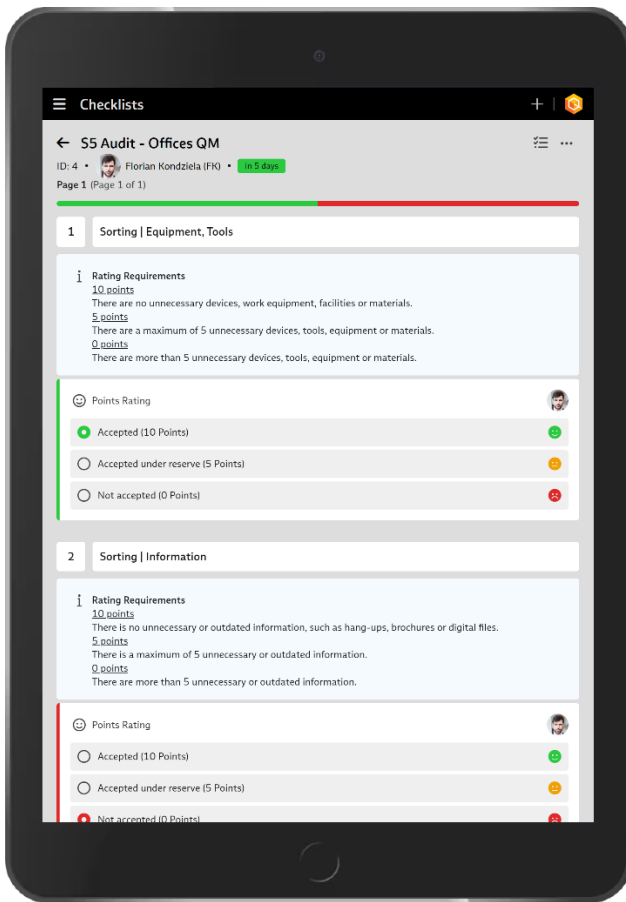


Fig.: View when recording the valuation

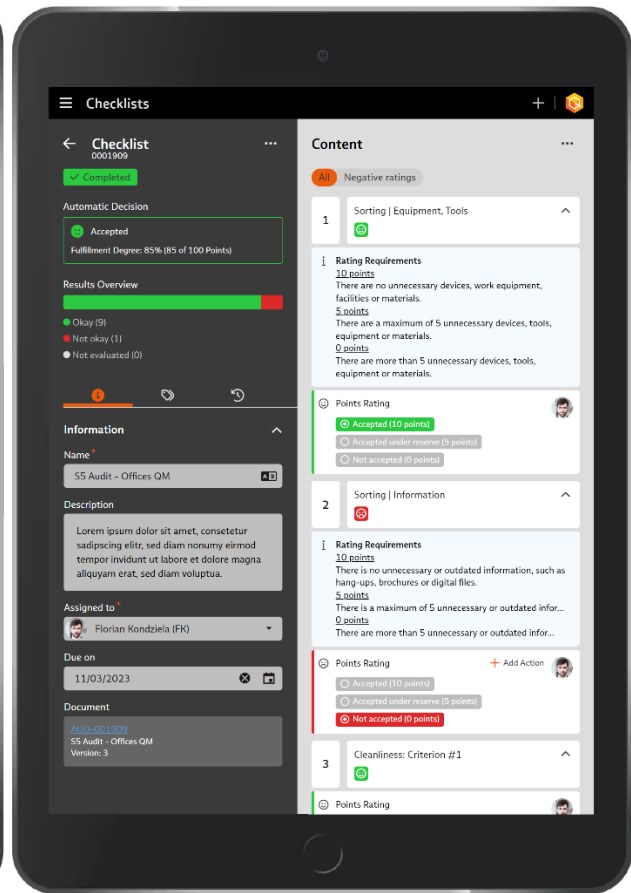


Fig.: View of the recorded evaluation in a completed checklist

2.4.3 Checklist: Brick "Catalog selection"

If this brick is used in a checklist, you can now also specify that a **contact (user or address)** is to be selected from a catalog when the checklist is created.

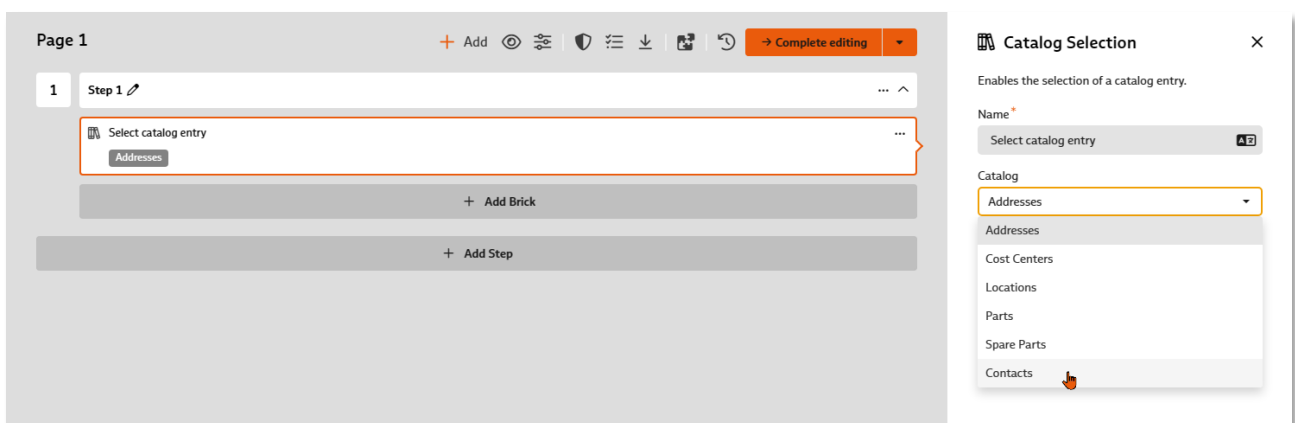


Fig.: Definition of the "Catalog selection" module, now also with contacts

2.4.4 Checklist: Brick "Link"

The "Link" brick recognizes whether the added link is a link to videos on the **YouTube and Vimeo platforms**. If the link is valid, the video is automatically embedded and a preview is displayed.

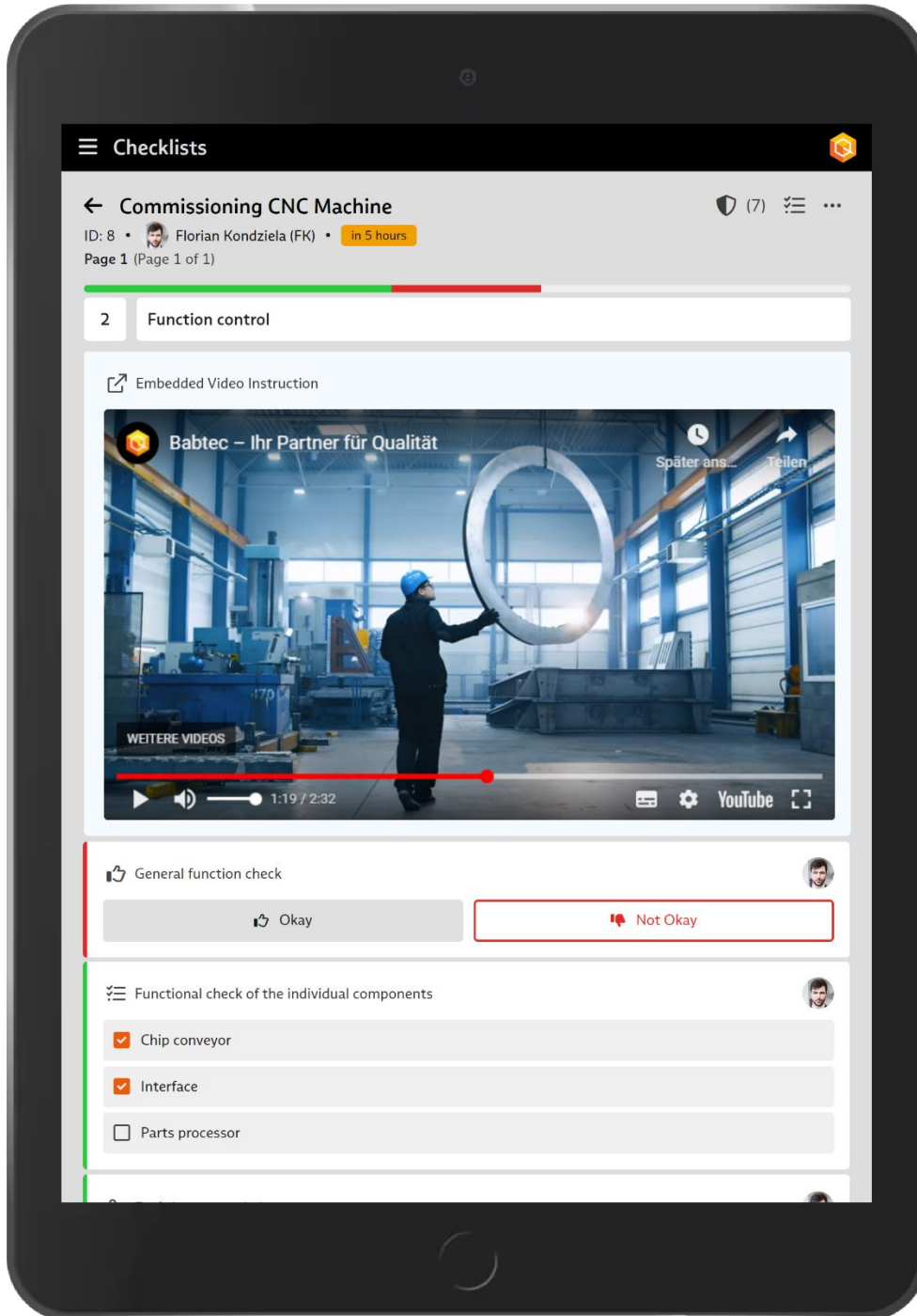


Fig.: "Link" module with embedded

2.4.5 Checklist: Brick configuration

When configuring a brick in a checklist, you can now specify which failures and/or actions should be available for selection for the **mandatory selection of failures and actions** in the event of a negative evaluation of the step. To do this, simply enter the **appropriate failure and/or action group**.

You will also find a revised dialog layout for the configuration of modules.

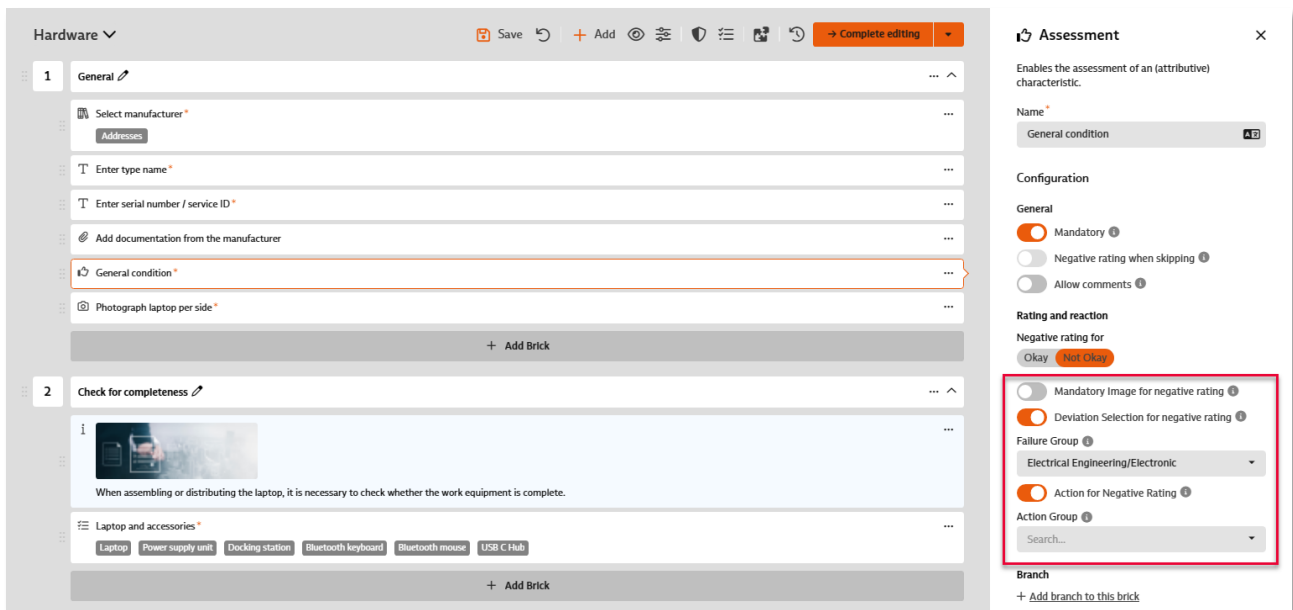


Fig.: Configuration of a brick, now also with selection of a failure and/or action group

2.4.6 Checklist: Moving bricks and steps

If, while editing the checklist document, it turns out that an already defined step or an existing brick would be **better placed on a different page of the checklist** - no problem. Now you can simply use the "Move" function and move the relevant step or brick to another existing page of the checklist.

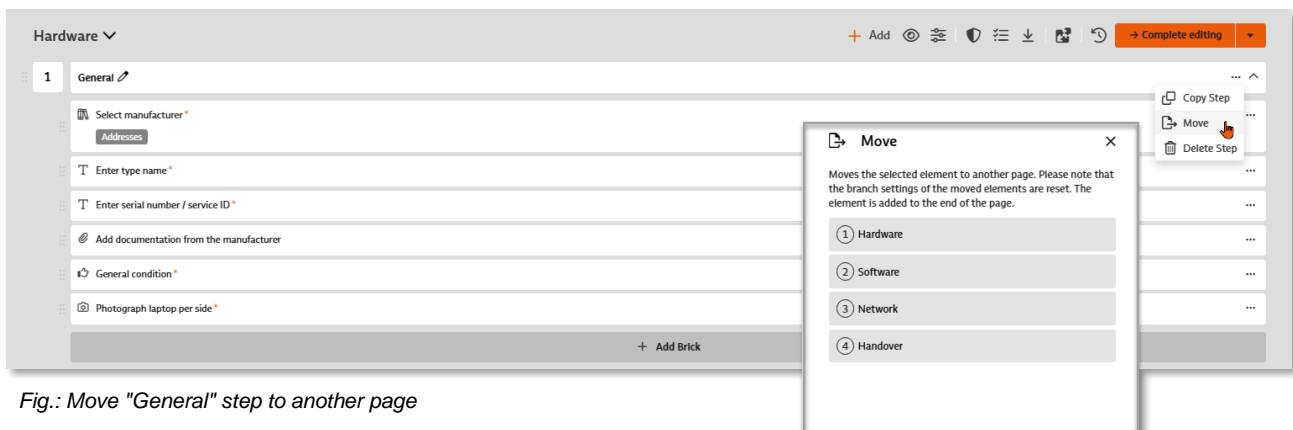


Fig.: Move "General" step to another page

2.4.7 Checklist: QR code

When generating the QR code for using the checklist, you can now optionally decide whether the checklist should only be created when using the QR code as before or whether the recording should also be started simultaneously - in this case, users can start directly.

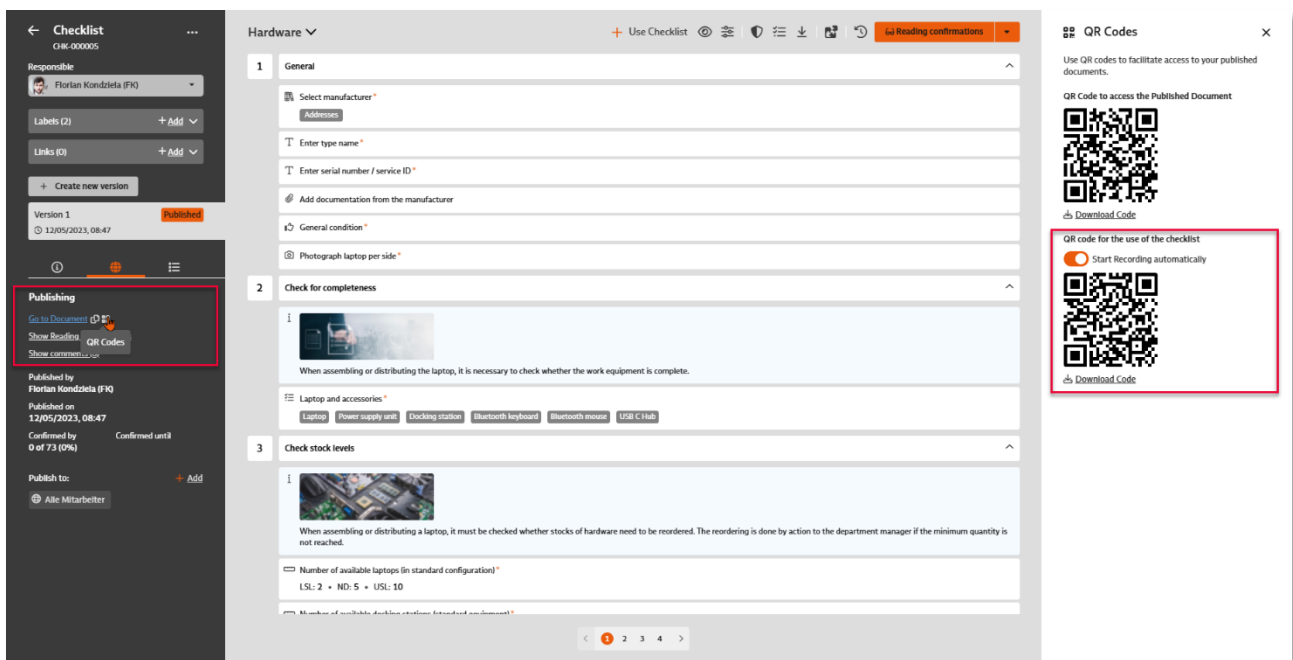


Fig.: QR codes for a checklist - here with the "Start recording automatically" option activated

2.4.8 Checklist: Define branches

Make your digital checklists even more interactive now: Do you also have use cases for checklists that would require you to continue with the first block of the third page, for example, rather than the next block of the checklist, depending on the result of a recorded block?

Then use the option to define branches from version 7.9 onwards. If a checklist comprises several pages, you can first define a **different page navigation**: For each page, you define on which subsequent page the checklist entry should be continued when it is completed.

You can also set **branches in the following bricks**:

- Evaluation and rating with points
- Single selection and multiple selection
- Question
- Measurement

Here you can define how the **process should continue depending on the user input**: Does it continue with the next module (standard behavior), should a certain subsequent page be opened or should the checklist entry even be aborted.

In the "Evaluation", "Evaluation with points", single selection and question modules, branching can be made directly dependent on the input options specified in each case. In the "Multiple selection" and "Measurement" modules, this is done depending on the evaluation - accepted or not accepted.

Please note that defined branches for bricks always "override" the set page navigation. However, a combination of page navigation and brick-related branches can be useful if two alternative "paths" are to be formed through the checklist. An example: *After page 1, depending on the answer to a question, either page 2 or page 3 should be opened, followed by the last page 4. In this case, the page navigation for page 2 should be set to continue on page 4. In this way, page 3 is skipped if the answer to the question leads to page 2 being activated.*

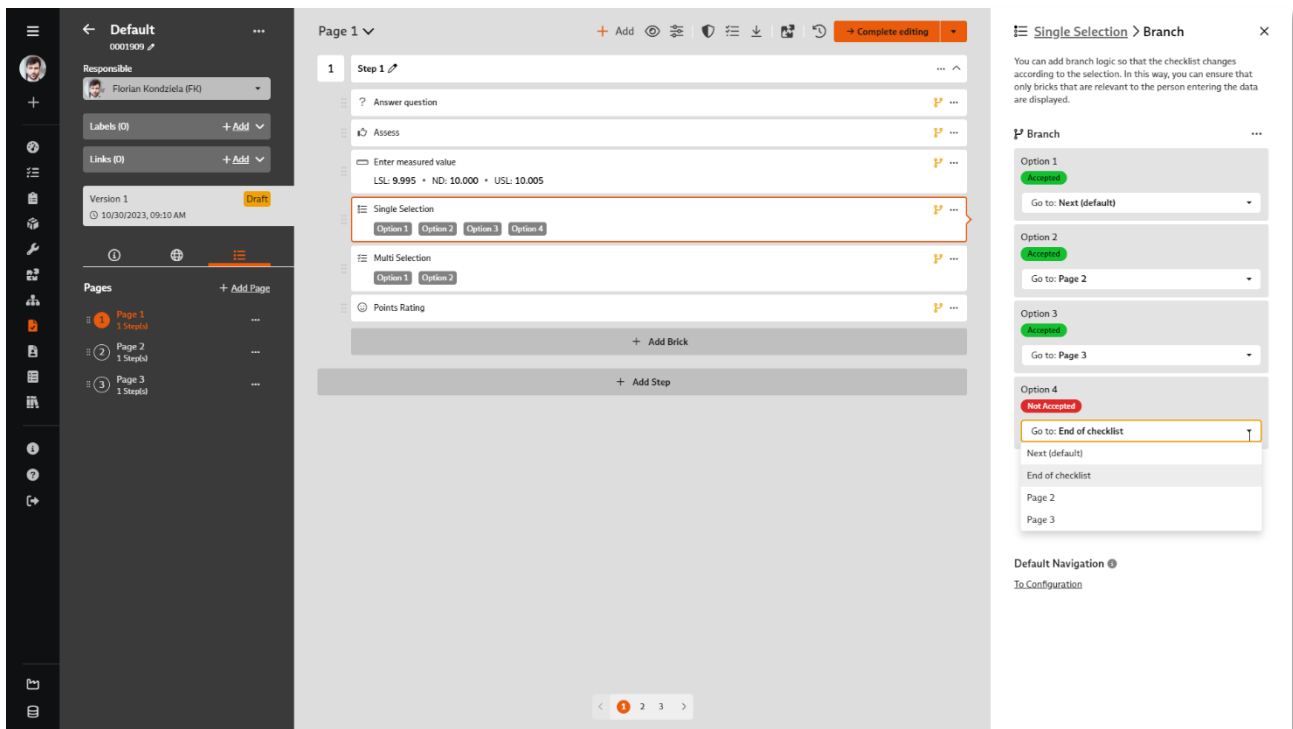


Fig.: Example of the definition of a brick-related branch

2.4.9 Checklist: Preview

While editing a checklist document, you can now display a **preview of the entry view** of the checklist at any time. This allows you to check directly how the settings you have made will affect the entry process. If the process does not turn out as expected, you can make any necessary adjustments directly before releasing the checklist for use.

The preview option is also available in a currently released version - but not in historic versions.

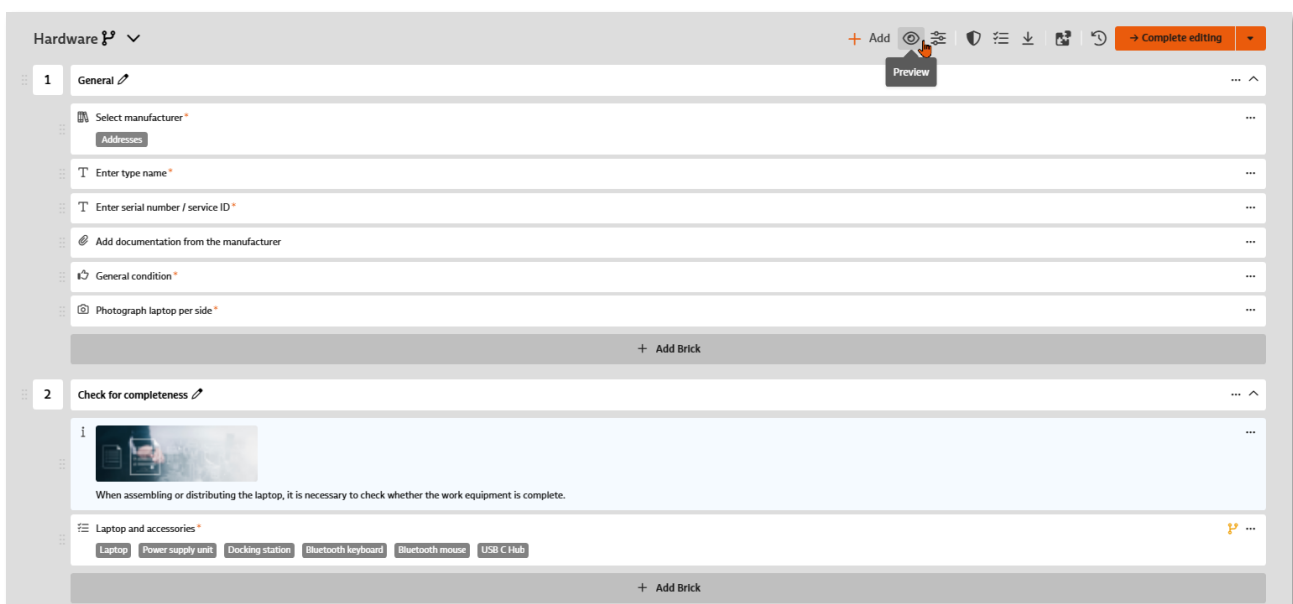


Fig.: New function call in the toolbar for a preview of the entry view of the checklist

2.4.10 Export checklist

From version 7.9, a version of a **document of the "Checklist"** type can be exported. All pages, steps and modules as well as their contents are exported. When an exported checklist is **imported**, a new document with the status "Draft" is created. The import takes place in the "Create document" dialog.

2.4.11 Copy documents

Documents can now be copied - this applies to both documents in file form and checklists. A copy **of the last version** of the document is created as a new document with the status "Draft"..

2.4.12 Multiple selection on mobile devices

Multiple selection of documents can now also be used on mobile devices, for example to move them to another folder. In addition, folders - one or more within the folder structure - can now also be moved.

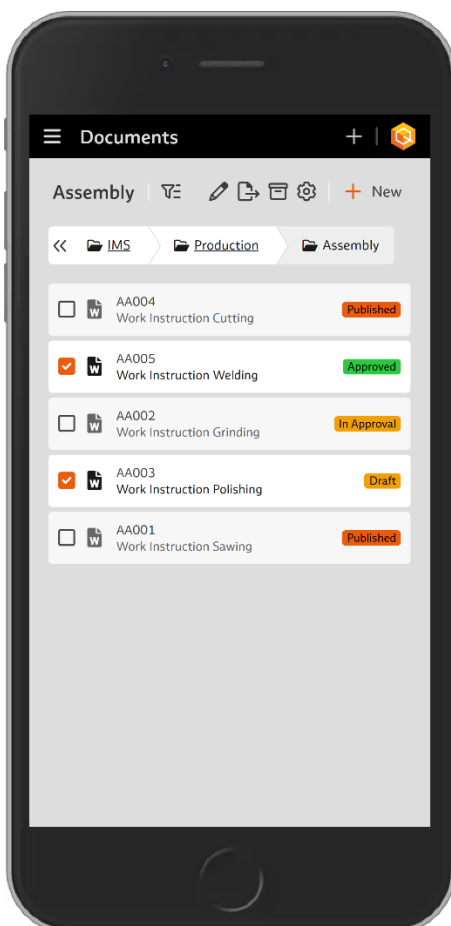


Fig.: Selection of several documents on a smartphone

2.4.13 Linked requirements

In order to meet the requirements of your interested parties, you must also develop specifications and rules as part of the process analysis, which are then defined and described in detail in applicable documents (in file form or as a digital checklist).

For each document, you will find the new **"Show requirements" function** in the toolbar. There you can already see from an indicator, e.g. (2), whether and how many requirements are linked to this document - provided the requirements are managed in the **"Requirements" module**.

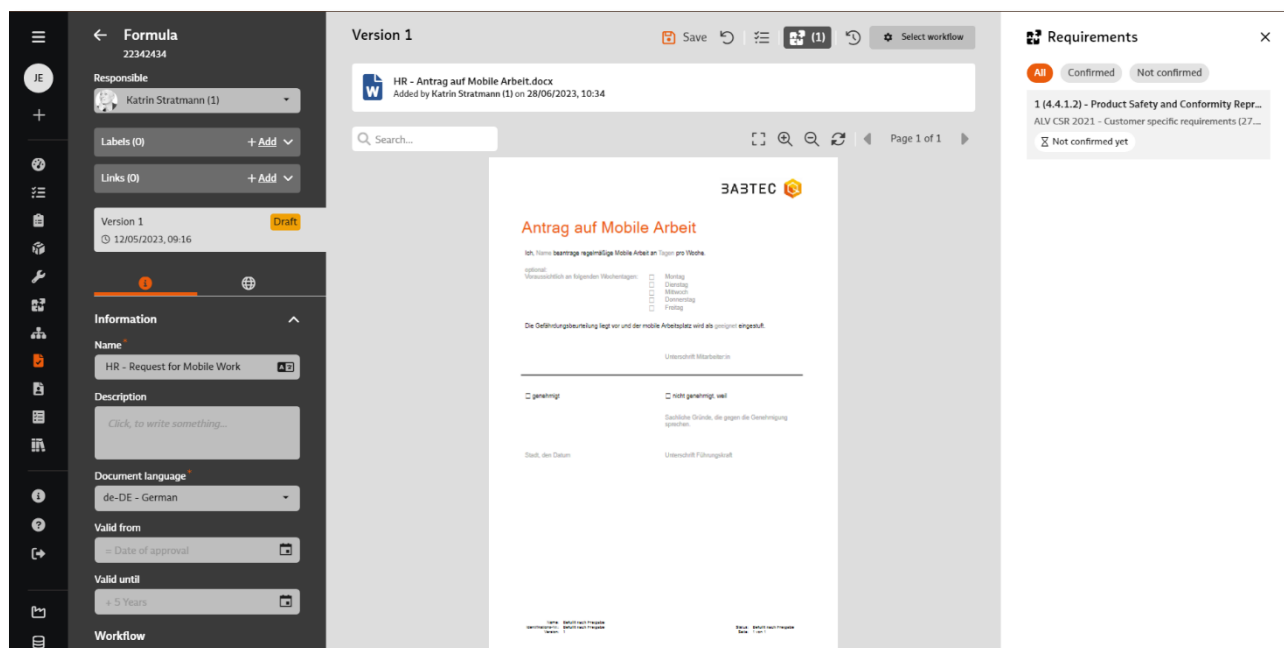


Fig.: Document with new overview of linked requirements

As the person responsible for the document, you will find an up-to-date overview of the (new) requirements to be taken into account in your document here. Simultaneously, you can confirm to the person responsible for the requirement here that you have taken note of the (new) requirement and will take the corresponding specifications, rules or instructions into account when creating the document or during the next review. If you also have at least (read) access to the **"Requirements" module**, you can open the requirement in question directly to obtain full information.

2.4.14 Using the folder structure on mobile devices

The display of document tiles has been revised. This means that the folder structure and documents from version 7.9 can now also be used on smaller mobile devices without any restrictions - this naturally also applies to the published documents in the "My documents" module.

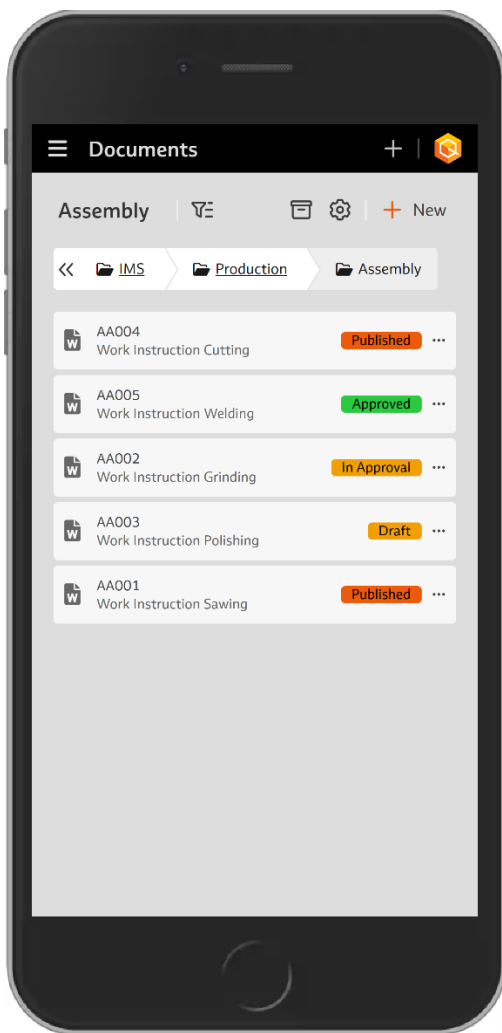


Fig.: Documents and folder structure on a smartphone

2.4.15 Further optimizations

The following has been revised for version 7.9:

- In the **list view for documents**, functions such as "Copy", "Move", "Delete" and "Move to" are available and have been adapted to the context menu in the folder structure.
- The dialog for displaying **reading confirmations for a document** has been revised and standardized.
- The layout for displaying the **log** has been revised and standardized, as has the display of the **"Check in" workflow dialog**.
- The **uploading of files and the selection of templates** when creating documents has been revised and standardized. The uploading of files in the "Document templates" catalog has also been updated accordingly.

- As long as a **document has the status "Draft"**, it can be edited both by the creator and by users who have the **"Edit document" right**. This also applies to starting the workflow.
- The **"Save" and "Undo" functions** can be triggered using hotkeys (CTRL-S and CTRL-Z).
- Date fields that are transferred to the header data of WORD documents are now displayed including the time.

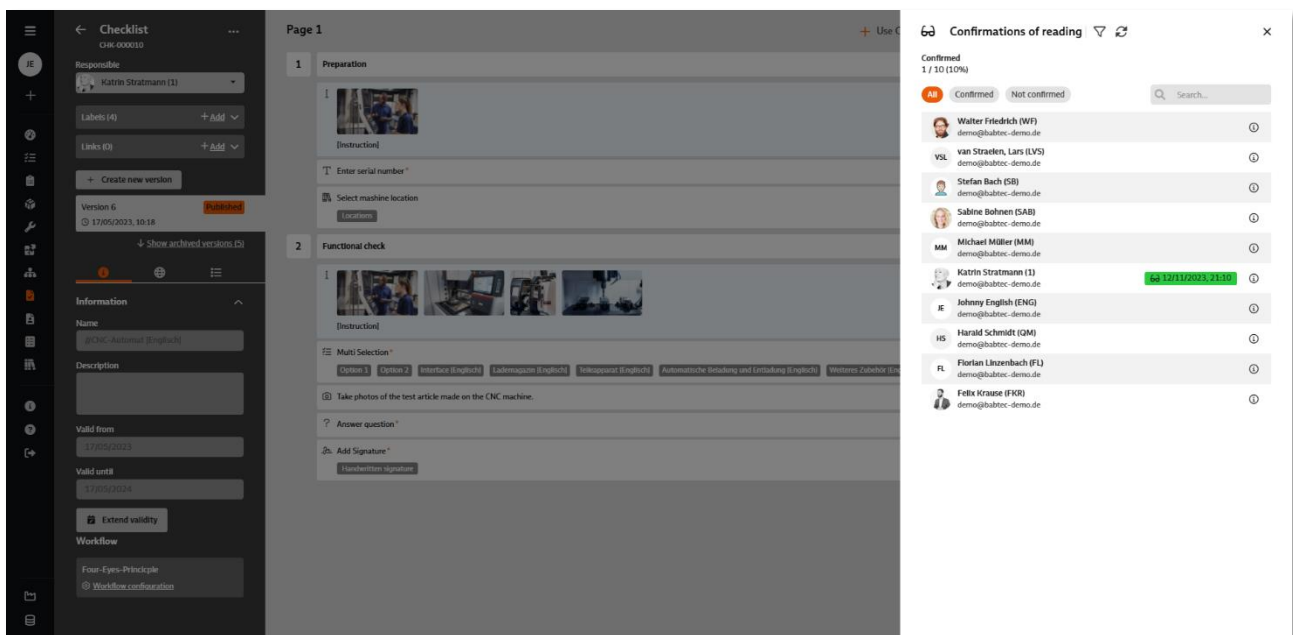


Fig.: Overview of the requested reading confirmation for a document - new dialog

2.5 My Documents

2.5.1 Enter checklists directly

For published checklists in the "My documents" module, the **"Create checklist" function** is available in the list views, in the folder structure and in the detailed view, so that you can start creating a checklist straight away.

When the function is called up, the checklist is already created in the database and the system switches directly to the entry view. The checklist is assigned to the current user, the "Due by" field is not set. The original function "Use checklist" has been renamed "Schedule checklist".

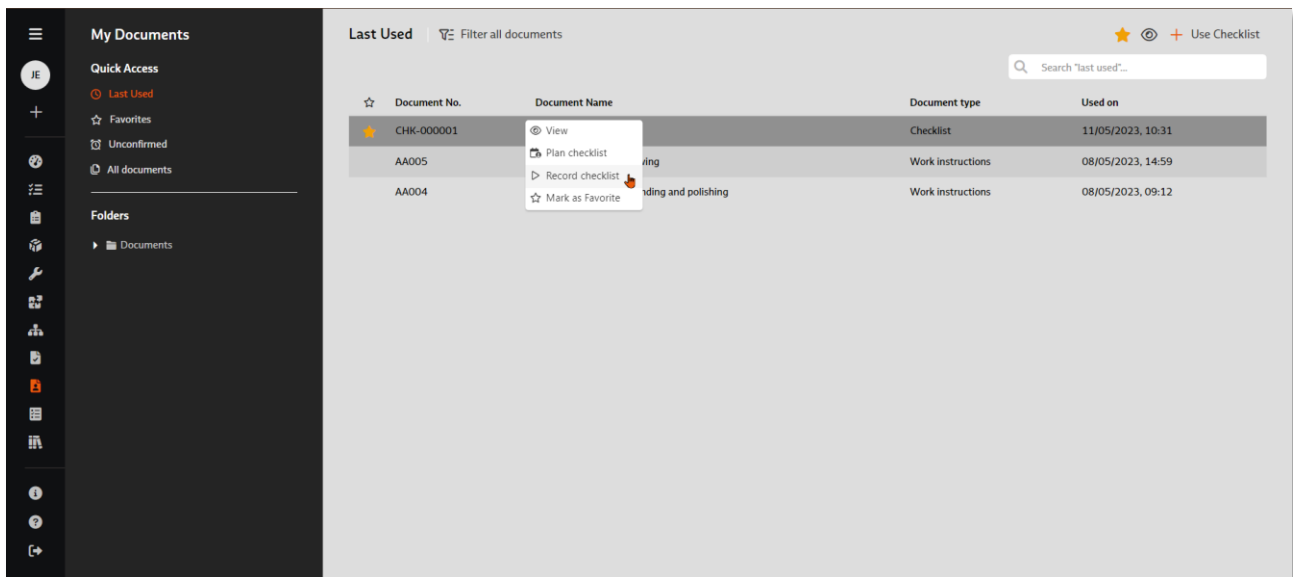


Fig.: New function call to enter a published checklist directly

Please note: When checklists are created automatically (by starting the entry directly or activating checklist sets), the mandatory fields are not validated. This validation only takes place when the checklist header data is edited and saved again.

2.5.2 Advanced search

When searching in the "Recently used" and "Favorites" list views, the assigned labels of a document are now also taken into account.

2.5.3 Folder structure

As of version 7.9, the **folder structure** can now also be used as an **alternative** for accessing published documents - it is the same folder structure as in the "Documents" module. Existing security settings are of course taken into account.

Using the folder structure is particularly suitable when using mobile devices.

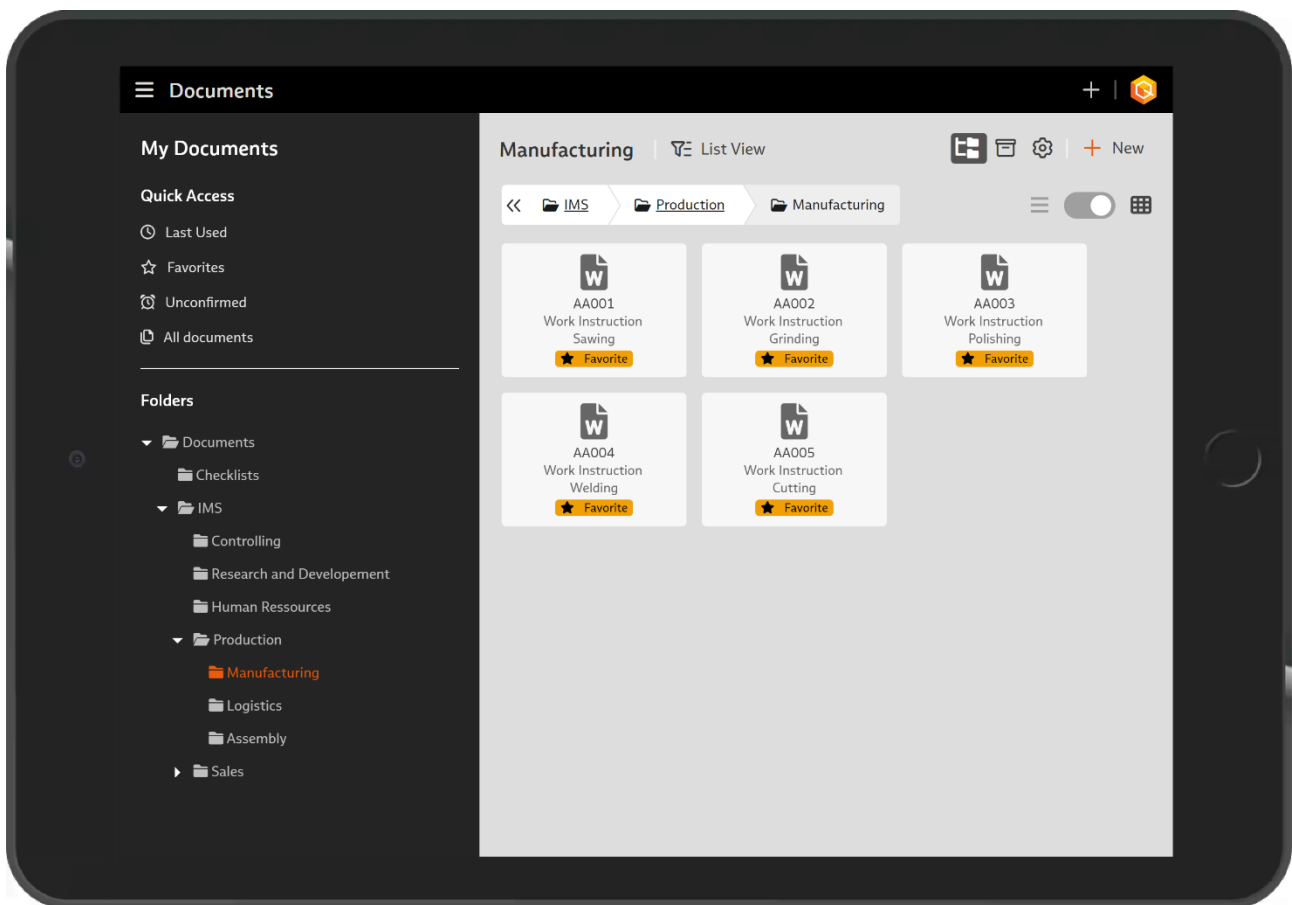


Fig.: Provision of published documents now also in a folder structure

2.5.4 Visualization of the due date of a pending reading confirmation

The due date of a pending reading confirmation for a published document is now clearly indicated with a colored indicator (escalation chip).

Document No.	Document Name	Document type	Version	Due Date	Valid From	Valid Till
CE-000002	Data protection agreement [Englisch]	Certificate	1	a year ago		
CHK-000010	#CNC-Automat [Englisch]	Checklist	6	-	17/05/2023	17/05/2024
FO-086	Cyclical assessment of the management	Formula	3	-	12/05/2023	12/05/2028
VA-190	Control of non-compliant products	Process instruction	3	-	12/05/2023	12/05/2024
NO-000006	Safety Information second floor	Laws / Directives / Standards	5	-	12/05/2023	12/05/2024
NO-000005	Safety instructions first floor	Laws / Directives / Standards	5	-	12/05/2023	12/05/2024

Fig.: Visual indication that a deadline has been exceeded

2.6 Maintenance Orders

Maintenance and repair orders can be processed here.

2.6.1 Repair orders: Acknowledge fault message

The "**Acknowledge fault message**" function is now also available while a repair order is being processed. If there are open fault messages for the machine in question, these can be acknowledged directly here.

To ensure that you do not overlook any fault messages, when the status changes to "Completed" or "Aborted", the system also inspects whether there are any outstanding fault messages - if this is the case, you can now acknowledge them directly with.

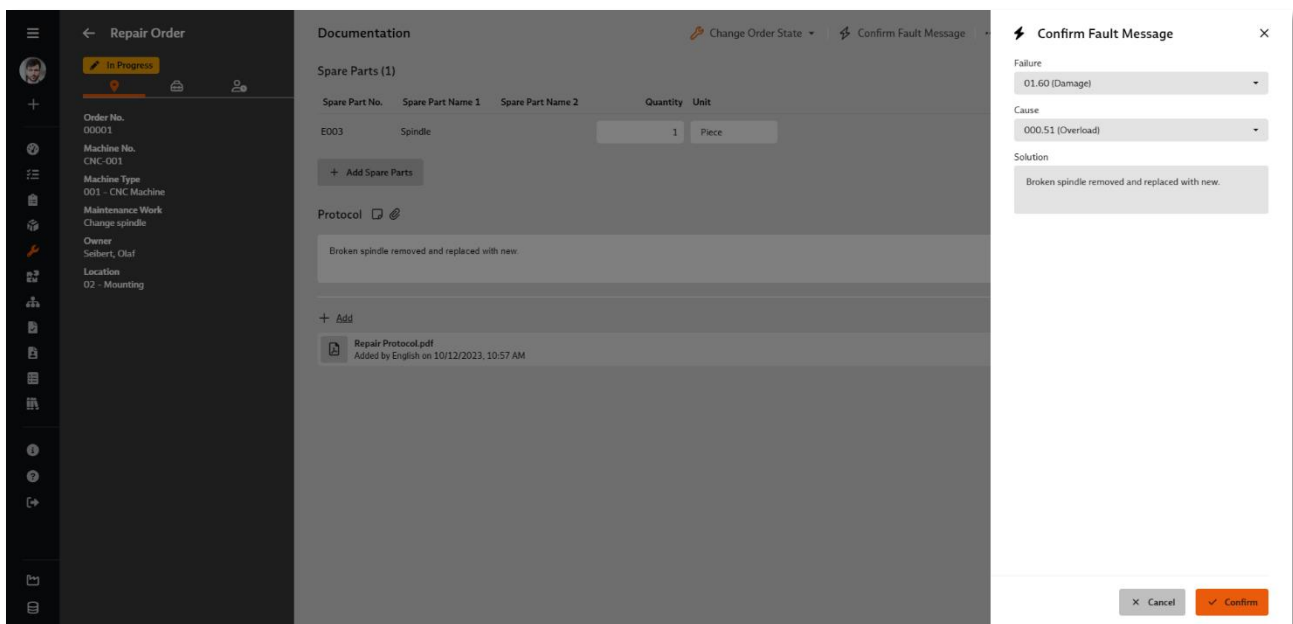


Fig.: Acknowledging an open fault message during the processing of a repair order

2.7 Catalogs

2.7.1 Workflows

The "Workflows" catalog is now located in the "General" area, as the workflows defined here can now be used for document control as well as for support in the processing and release of processes.

Workflows in the catalog are now managed with a **list view**, including a toolbar for the "Edit" and "Delete" function calls, which are also available in the context menu.

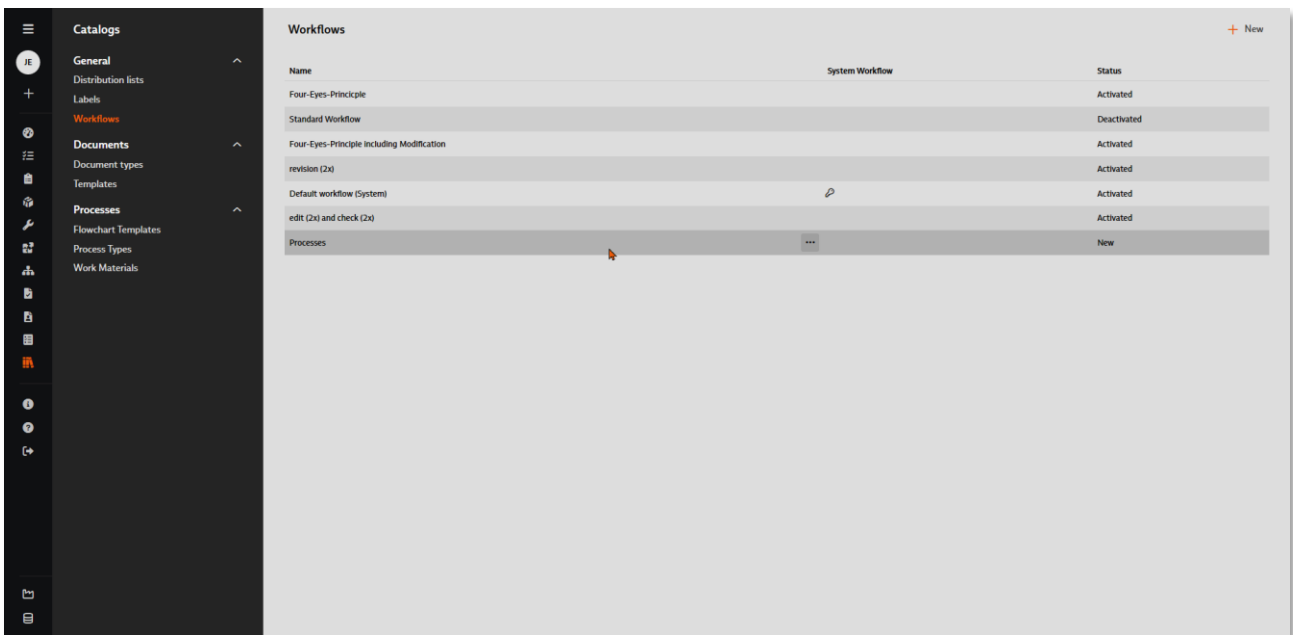


Fig.: Management of the defined workflows in the catalog - now in the "General" area

In addition, the editing of the individual workflow steps has been revised for you and the original "Short name" and "Name" fields for the name of a workflow **have been merged into the "Name" field.**

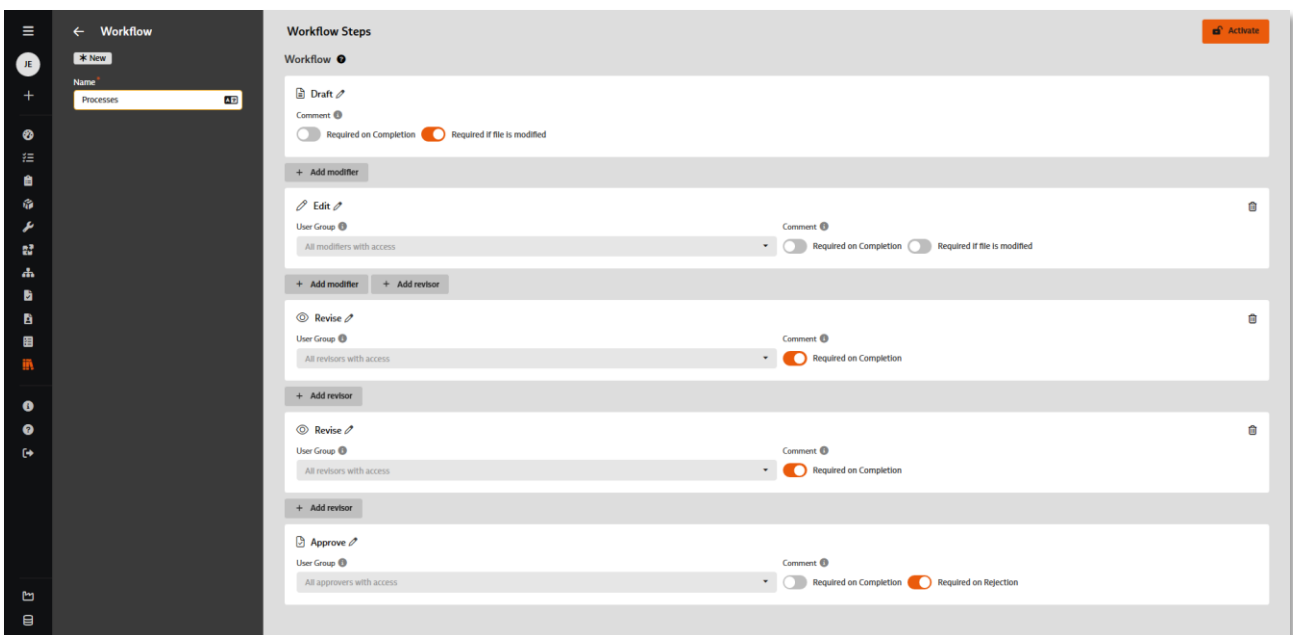


Fig.: New editing screen for the workflow steps

2.8 Processes

Functioning business processes and their continuous further development are essential for every company - especially if an **effective quality management system**, product quality and satisfied customers are the focus of the company's activities.

Because we would like to support you in turning your planned processes into real, lived and, above all, effective processes, we have continued to dedicate ourselves to the new **process management module** (released with version 7.7 in December 2022) in the new release 7.9.

2.8.1 Filter in the process map

The **filter dialog** known from the list view for processes is now also available in the process map - **both in edit and read mode**.

Depending on the selected filter settings, the structure tree and process map are displayed in such a way that only the **filtered processes** are shown. In this way, you can now restrict the display of the process map to the processes of a specific location (label), for example.

If you have already saved **filtered views** in the list view of the processes, this selection of views is also available to you in the process map.

Please note:

If you have activated security settings for restricted access to certain folders, these are also taken into account for the logged-in user in the filtered process structure or map.

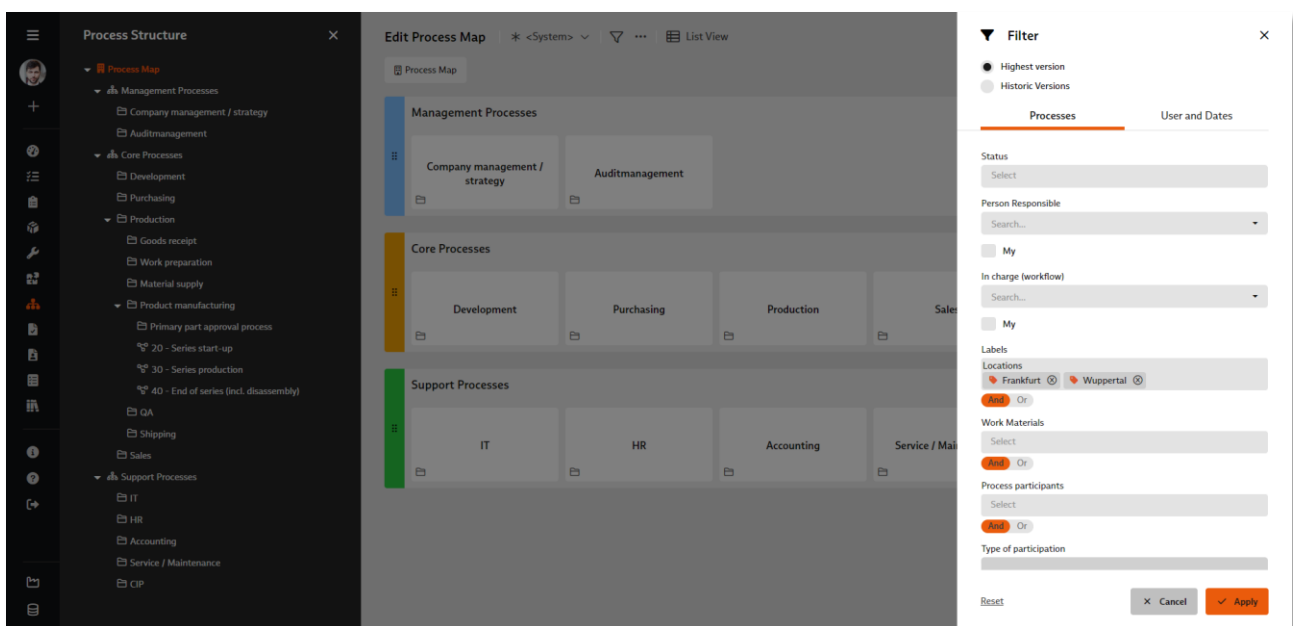


Fig.: Filter dialog in the process map

If you use **more than one entry for "Labels", "Work materials" and "Process participants"** in the filter dialog, you can now decide whether the respective selection should be **ANDed** or **ORed** when filtering the processes.

For example, if the processes should have all of the selected labels, use the **"AND"** option. If, on the other hand, the processes should only be marked with at least one of the selected labels, use the **"OR"** option:

2.8.2 Release with workflow support

From the analysis of a process to the creation and release of the process description, various steps are required in which different colleagues are often involved. For this reason, the **workflow support familiar** from document control can now also be used in the **"Processes" module**.

The release workflows are defined and managed in the **"Workflows" catalog**. In addition to the prescribed **steps for draft and release**, you can define **any number of editing and checking steps** in each workflow in accordance with your release processes.

If a standardized release process has been established, it is possible to specify an activated workflow from the catalog for each folder in the process structure, which is then preassigned as a release workflow in every new process added to this folder. If necessary, this pre-assignment can also be replaced by another workflow from the catalog in the draft status of a process or a new process version.

The release workflow for the process in question can be **configured individually** at a later stage: The **"Show progress" function** in the editing mode of a process shows which workflow steps have already been completed, which steps are active and which are still open. Here you can now specify a **deadline** for each step that has not yet been completed and enter a **responsible user**, which are then also shown in the progress overview. You can also see whether a **deadline has already been reached or has expired** - in this case, the relevant deadlines are displayed in red.

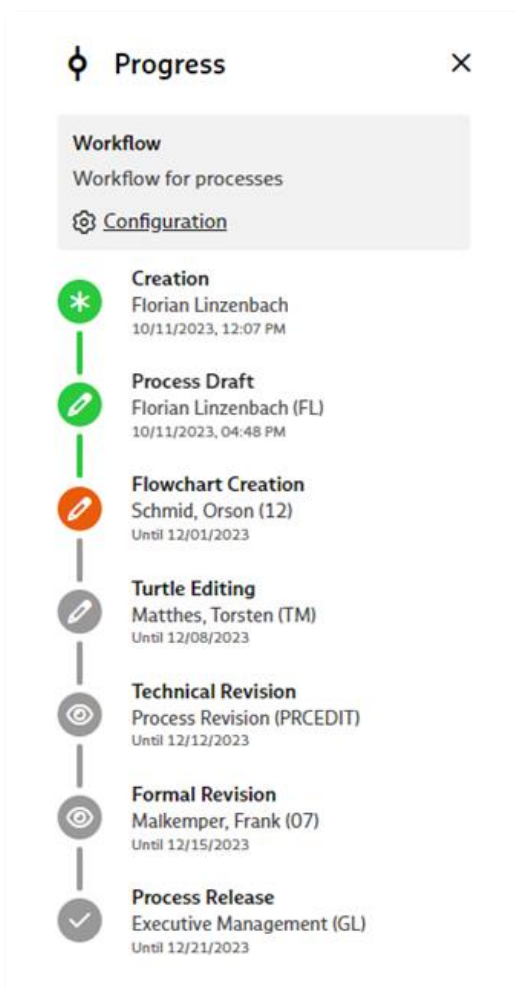


Fig.: Example of a release workflow for the creation, inspection and release of a process description

A log ensures transparency regarding the processing and release of a process: Every status change and every executed workflow step is documented there. Each entry contains the name of the user who carried out the event, the date and time of execution and the comments recorded.

Further information: **2.7.1 | Workflows**

2.8.3 Linked requirements

To analyze a process and create a process description, it is also necessary to know and take into account the relevant requirements that are placed on your company by interested parties - and that are relevant to this process.

In the editing mode of a process, you will find the new **"Show requirements" function** in the toolbar. There you can already see from an indicator, e.g. (2), whether and how many requirements are linked to this process - provided the requirements are managed in the **"Requirements" module**.

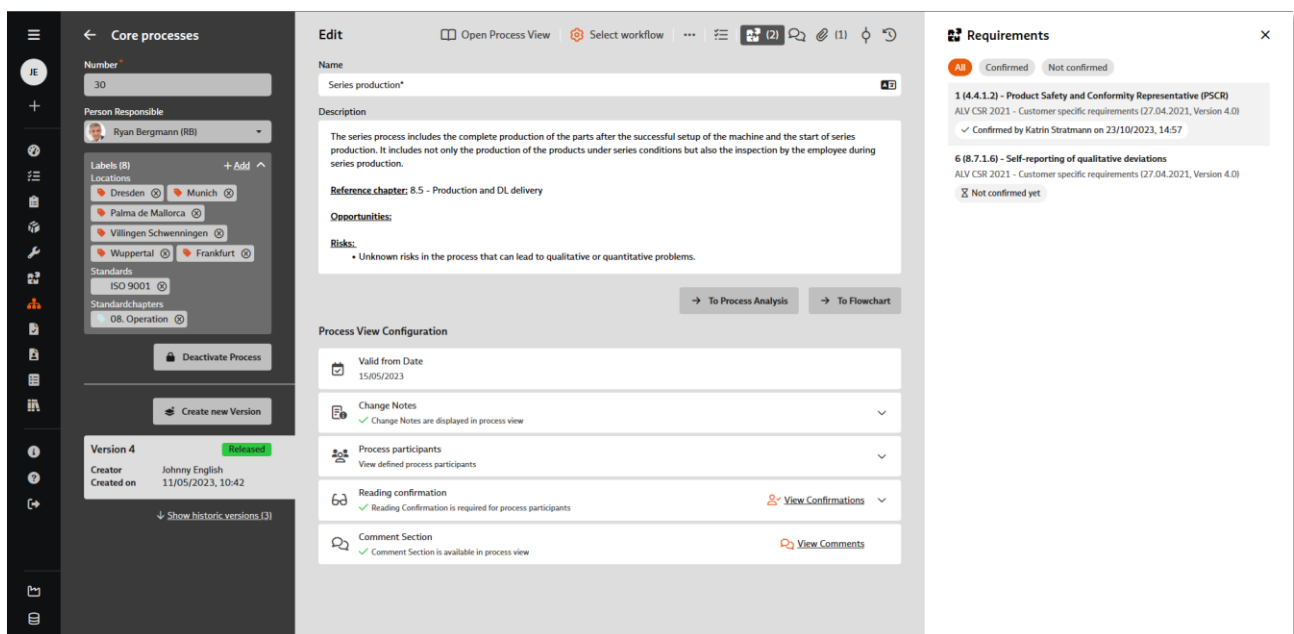


Fig.: Process in edit mode with new overview of linked requirements

As the person responsible for the process, you will find an up-to-date overview of the (new) requirements to be taken into account in your process here. Simultaneously, you can confirm to the person responsible for the requirement here that you have taken note of the (new) requirement and will take it into account when creating the process description or during the next review. If you also have at least (read) access to the **"Requirements" module**, you can open the requirement in question directly to obtain full information.