UGN

Sound Solutions for the Automotive Industry®

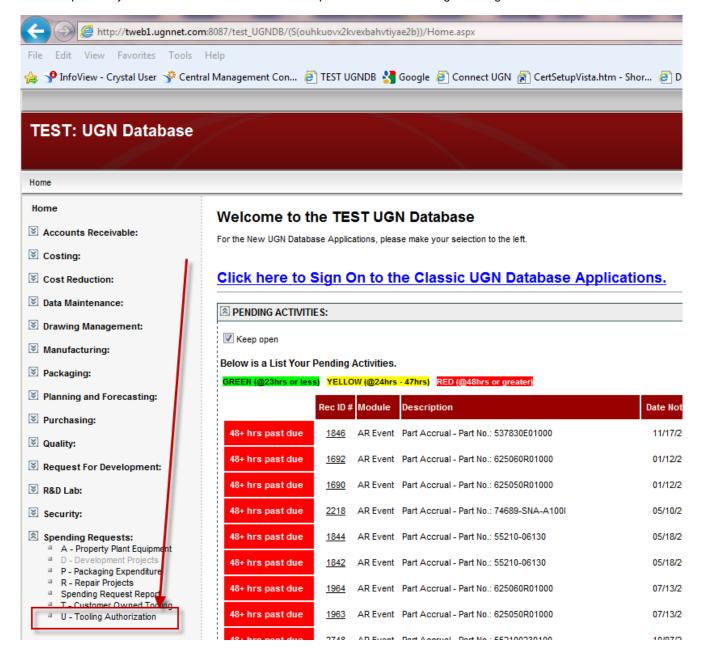**Spending Request Tooling Authorization User Guide**   **10/29/2012**

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Overview:

The tooling authorization form to request "dieshop cost forms" to create or changes die boards is now under the "Spending Requests" module of the UGN Database. This will allow team members in the Quality Engineering, Program Management, or other specifically defined team members to initiate requests to create or change existing die boards.

Spending Request Tooling Authorization User Guide 10/29/2012

Screens:

- Search / List page to find forms and their status
- Detail page to see all of the information and related items
- History page to show the status of activities
- PDF Print Preview of Tooling Authorization Form
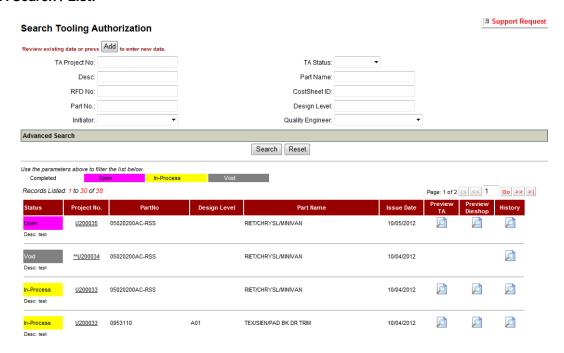- PDF Print Preview of Dieshop Cost Form

General Workflow:

- The "TA" request can be created by Quality Engineer, Program Manager, or other specifically defined team members at the facilities
- Information will be inherited from the RFD number. If no RFD exists, then a VALID part number and program will be assigned. If the RFD is assigned, then the part and customer information will be prefilled and locked.
- Previewing documents will be in PDF instead of MS Excel
- The initiator of the TA will assign tasks to teach members with due dates.
- One task will be automatically assigned - to "Build the Dieshop Cost form."
- Team Members will be notified by email of their tasks. Once they have completed their tasks, they can click on a link to open the record and enter when the task was complete.
- The UGN Database pending tasks will contain these items and will be included in the existing daily email reminder as well as the normal "Pending Tasks" page available on the "Sharepoint Portal" and "Home" page.
- The team member who creates the "Dieshop Cost Form" will update any instructions, the serial number, rules, labor costs, and material costs.
- Once all of the tasks are complete, the TA will be closed.
- Initiators can manually close or void the TA as well.
- There will be a weekly report per facility showing all completed forms. It will include the Initiators, Quality Engineers, Program Managers, Account Managers, Tasked Team Members, Plant Controllers, and Cost Accountants.

TA Search / List:

Search Tooling Authorization

Review existing data or press **Add** to enter new data.

TA Project No:		TA Status:	
Desc:		Part Name:	
RFD No:		CostSheet ID:	
Part No.:		Design Level:	
Initiator:		Quality Engineer:	

Advanced Search

Search   Reset

Use the parameters above to filter the list below.

Completed   Open   In-Process   Void

Records Listed: 1 to 30 of 38   Page: 1 of 2 |< << 1 Go >> >|

Status	Project No.	PartNo	Design Level	Part Name	Issue Date	Preview TA	Preview Dieshop	History
Open Desc: test	U200035	05020200AC-RSS		RIET/CHRYSL/MINIVAN	10/05/2012	🔍	🔍	🔍
Void Desc: test	**U200034	05020200AC-RSS		RIET/CHRYSL/MINIVAN	10/04/2012			🔍
In-Process Desc: test	U200033	05020200AC-RSS		RIET/CHRYSL/MINIVAN	10/04/2012	🔍	🔍	🔍
In-Process Desc: test	U200033	0953110	A01	TEX/SIEN/PAD BK DR TRIM	10/04/2012	🔍	🔍	🔍

- Search by the following fields:
  - Project Number
  - Status
  - Description
  - Part Number
  - Part Name
  - Design Level
  - RFD No
  - Cost Sheet ID
  - Initiator
  - Quality Engineer
  - Program Manager
  - Account Manager
  - Program
  - Customer
  - UGN Facility

- The old system can be searched as well from this page.
- The results of the search show:
  - Status of TA
  - Link to Details page
  - Description
  - Project Number
  - Part Number
  - Design Level, if exists
  - Part Name
  - Issue Date
  - Link to PDF Preview of TA form
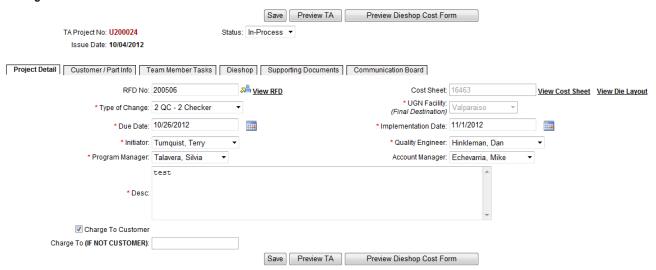 - Link to PDF Preview of Dieshop Cost form
  - Link to History page

TA Details:

Several Tabs exist on the page
- Project Details
- Customer / Part Information
- Team Member Tasks
- Dieshop Information
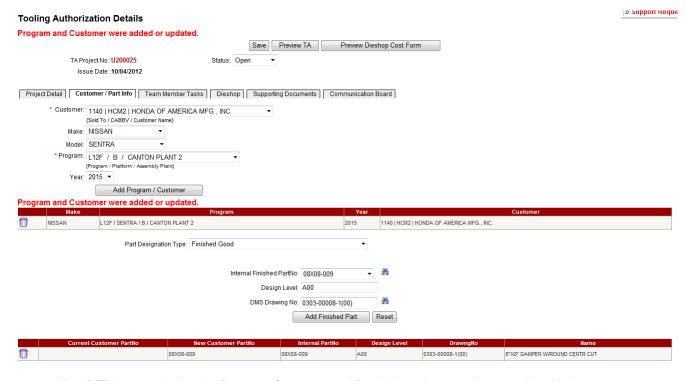- Supporting Documents
- Communication Board

Tooling Authorization Details

| Save | Preview TA | Preview Dieshop Cost Form |

TA Project No: **U200024**   Status: In-Process ▾
Issue Date: **10/04/2012**

| Project Detail | Customer / Part Info | Team Member Tasks | Dieshop | Supporting Documents | Communication Board |

RFD No: 200506   🔍 **View RFD**   Cost Sheet: 16463   **View Cost Sheet**   **View Die Layout**

* Type of Change: 2 QC - 2 Checker ▾   * UGN Facility: Valparaiso ▾
                                              (Final Destination)

* Due Date: 10/26/2012 📅   * Implementation Date: 11/1/2012 📅

* Initiator: Turnquist, Terry ▾   * Quality Engineer: Hinkleman, Dan ▾

* Program Manager: Talavera, Silvia ▾   Account Manager: Echevarria, Mike ▾

* Desc: test

☑ Charge To Customer
Charge To **(IF NOT CUSTOMER)**: _____

| Save | Preview TA | Preview Dieshop Cost Form |

- The TA number will start with the letter "U" and be incremented starting with 200000.
- The Initiator should enter the RFD number if it exists. All part and customer information would automatically be populated on the next tab. Also the UGN Facility, Program Manager, and Account Manager would be prefilled.
- Fields that are common to the RFD are locked.
- The Cost Sheet will be tied to the RFD.
- Type of change is required
- Due Date is required
- Implementation Date is required.
- Description is required.
- By default, there is a check box indicating that the customer should be charged. If the customer should NOT be charged, then a text box is enabled to allow the team member to type who should be charged.
- The initiator can manually close or void this by changing the status in the dropdown box. An explanation is required to void. If this is closed manually, then all pending tasked team members will be removed from the list. This can NOT be manually closed without the "Dieshop Cost Form" being completed, however.
- Initiators can copy the TAs as needed. Only information from the first three tabs will be copied, although neither the RFD number nor the Cost Sheet ID will be copied.

Tooling Authorization Details

Program and Customer were added or updated.

| Save | Preview TA | Preview Dieshop Cost Form |

TA Project No: U200025   Status: Open ▼

Issue Date: **10/04/2012**

| Project Detail | Customer / Part Info | Team Member Tasks | Dieshop | Supporting Documents | Communication Board |

* Customer: 1140 | HCM2 | HONDA OF AMERICA MFG., INC. ▼
{Sold To / CABBV / Customer Name}

Make: NISSAN ▼

Model: SENTRA ▼

* Program: L12F / B / CANTON PLANT 2 ▼
{Program / Platform / Assembly Plant}

Year: 2015 ▼

| Add Program / Customer |

Program and Customer were added or updated.

	Make	Program	Year	Customer
🗑	NISSAN	L12F / SENTRA / B / CANTON PLANT 2	2015	1140	HCM2	HONDA OF AMERICA MFG., INC.

Part Designation Type: Finished Good ▼

Internal Finished PartNo: 08X08-009 ▼ 🔍

Design Level: A00

DMS Drawing No: 0303-00008-1(00) 🔍

| Add Finished Part | Reset |

	Current Customer PartNo	New Customer PartNo	Internal PartNo	Design Level	DrawngNo	Name
🗑		08X08-009	08X08-009	A00	0303-00008-1(00)	8"X8" DAMPER W/ROUND CENTR CUT

- If no RFD is entered, then the Program, Customer, and Part information must be manually added.
- The parts can be finished goods or semi-finished goods.
- Only valid and existing customer. program, and part information can be assigned.

Tooling Authorization Details   ☐ Support Request

| Save | Preview TA | Preview Dieshop Cost Form |

TA Project No: U200025   Status: Open ▼

Issue Date: **10/04/2012**

| Project Detail | Customer / Part Info | Team Member Tasks | Dieshop | Supporting Documents | Communication Board |

Edit	Delete	Task	Team Member	Due	Completion	Notification
✎	🗑	Build Dieshop Cost Form	Turnquist, Terry	10/05/2012		
✎	🗑	Additional Review of Dieshop Cost Form	Cox, Allen	10/25/2012		
💾 ↺		▼	* ▼	* 📅		

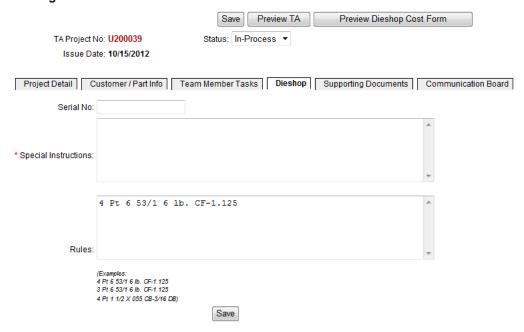| Notify | ☐ Notify All Team Members listed

- Tasks can be assigned to team members. Due Date is required.
- A notify button is available for the initiator to send an email to the tasked team members.
- The tasked team members will complete their assigned task and update the "completion date" on this tab.
- Once all of the tasks have been completed, the overall status of the TA will be changed to "Complete."
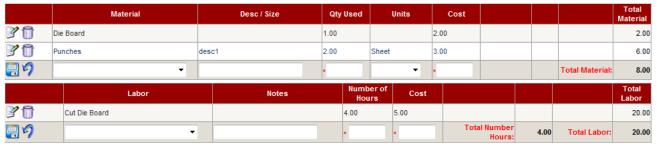
Tooling Authorization Details

| Save | Preview TA | Preview Dieshop Cost Form |

TA Project No: **U200039**   Status: In-Process ▾

Issue Date: **10/15/2012**

| Project Detail | Customer / Part Info | Team Member Tasks | Dieshop | Supporting Documents | Communication Board |

Serial No: [   ]

* Special Instructions: [   ]

Rules:
```
4 Pt 6 53/1 6 lb. CF-1.125
```

(Examples:
4 Pt 6 53/1 6 lb. CF-1.125
3 Pt 6 53/1 6 lb. CF-1.125
4 Pt 1 1/2 X 055 CB-3/16 DB)

| Save |

	Material	Desc / Size	Qty Used	Units	Cost				Total Material
📝🗑	Die Board		1.00		2.00				2.00
📝🗑	Punches	desc1	2.00	Sheet	3.00				6.00
💾↩	▾		*	▾	*			Total Material:	8.00

	Labor	Notes	Number of Hours	Cost				Total Labor
📝🗑	Cut Die Board		4.00	5.00				20.00
💾↩	▾		*	*	Total Number Hours:	4.00	Total Labor:	20.00

Total Tooling Authorization Dieshop Cost: **$28.00**
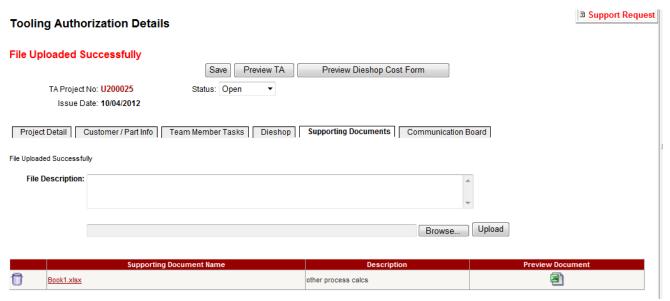
☐ Dieshop Cost Complete | Dieshop Complete |

- The team member who is assigned the task to "Build the Dieshop Cost Form" will open the "Dieshop" tab on this page and enter the serial number, special instructions, rules, material costs, and labor costs.
- The total costs will be automatically calculated.
- Information on this tab will be the basis for the "PDF Preview" of the "Dieshop Cost Form."
- Once complete, the team member will press the "Dieshop Complete" button. This will update the "team member tasks" tab as well for this specific activity.

_____

Tooling Authorization Details

File Uploaded Successfully

◫ Support Request

[Save] [Preview TA] [Preview Dieshop Cost Form]

TA Project No: **U200025**   Status: Open ▾

Issue Date: **10/04/2012**

[Project Detail] [Customer / Part Info] [Team Member Tasks] [Dieshop] [**Supporting Documents**] [Communication Board]

File Uploaded Successfully

File Description:

[   ] [Browse...] [Upload]

🗑	Supporting Document Name	Description	Preview Document
	Book1.xlsx	other process calcs	📊

- Team members can upload other supporting documents
- Links to these documents would be included in the email notification when the "notify" button is pressed on the "team member tasks" tab.

Tooling Authorization Details

| Save | Preview TA | Preview Dieshop Cost Form |

TA Project No: **U200025**   Status: Open ▼
Issue Date: **10/04/2012**

| Project Detail | Customer / Part Info | Team Member Tasks | Dieshop | Supporting Documents | **Communication Board** |

* New Question:

| Submit | Reset |

Select a 'Question / Comment' from discussion thread below to respond.

Question to Answer:

* Reply / Comment:

Reply	Question / Comment	Submitted By	Post Date
👥	test	Turnquist, Terry	Thursday, October 4, 2012 13:09:40
👥	what?	Turnquist, Terry	Thursday, October 4, 2012 13:09:49
	Response		
	this and that	Turnquist, Terry	Thursday, October 4, 2012 13:09:57

- Team members can send questions and reply to comments using the communication board. It will be sent to all team members on the "tasks" list.

TA History:

-      As team members submit and complete activity or leverage the communication board, information will be logged on the history page.

Tooling Authorization Project History

TAProject No: 200023

Page: 1 of 1 |< << 1 Go >> >|

Action Date	Action Taken By	Description
10/3/2012 3:52:12 PM	Hall, Bryan	Tooling Authorization Completed
10/3/2012 3:37:52 PM	Hall, Bryan	Dieshop Cost Form Complete
9/27/2012 11:42:09 AM	Hall, Bryan	Tooling Authorization Created

Preview Tooling Authorization Form:

Tooling Authorization

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UGN LOCATION	ISSUED BY		PROJECT NUMBER
Valparaiso	Turnquist, Terry		**U200024**
PROJECT STATUS	**QUALITY ENGINEER**		**ISSUE DATE**
In-Process	Hinkleman, Dan		10/04/2012
RFQ NO	**PROGRAM MANAGER**		**IMPLEMENTATION DATE**
200506	Talavera, Silvia		11/01/2012
COST SHEET ID	**ACCOUNT MANAGER**		**DUE DATE**
16463	Echevarria, Mike		10/26/2012
TYPE OF CHANGE	**CHANGE TO**		
2 QC - 2 Checker	CUSTOMER		

CUSTOMER / PROGRAM(S)

CUSTOMER	YEAR	MAKE	PROGRAM, MODEL, PLATFORM, ASSEMBLY PLANT
1140	HMIN1	HONDA OF AMERICA MFG., INC.	2012	ACURA	2TA / IL / C-5 / GREENSBURG

FINISHED PART(S)

CURRENT CUST PART NO	NEW CUST PART NO	INTERNAL PART NO	DESIGN LEVEL	DRAWING NO	NAME
	74252-TX6-A000		A-11-02810	3416-16018-1(00)	INS DA BD UP OUT

DESCRIPTION

test

REQUIREMENT(S)

TASK	TEAM MEMBER	DUE	COMPLETION	NOTIFICATION
Build Dieshop Cost Form	Turnquist, Terry	10/05/2012	10/04/2012	10/04/2012

PRINT DATE: 10/4/2012 1:15:35PM
U200024

QA101b Revision 3
Originating Date: 10/15/2012
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Preview Dieshop Cost Form:

Dieshop Tooling Cost Form

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DIESHOP COST FORM CREATED BY:	PROJECT NUMBER:
Turnquist, Terry	U200039
ACCOUNT MANAGER	**ISSUE DATE**
Marcon, Daniel	10/15/2012
SERIAL NO.	**COMPLETION DATE**

CUSTOMER / PROGRAM(S)

CUSTOMER	YEAR	NAME	PROGRAM / MODEL / PLATFORM / ASSEMBLY PLANT
1073	AAII	AUTO ALLIANCE (MAZDA) - NIPPON	2004	ACURA	2TA / IL / C-5 / GREENSBURG

FINISHED PART(S)

CURRENT CUST PART NO	NEW CUST PART NO	INTERNAL PART NO	DESIGN LEVEL	DRAWING NO	NAME
05020200AC-RSS	05020200AC-RSS			0303-00008-1(00)	RIET/CHRYSL/MINIVAN

SPECIAL INSTRUCTIONS

RULES

4 Pt 6 53/1 6 lb. CF-1.125

COST(S)

			HOURS	COST	TOTAL
LABOR	Cut Die Board		4.00	$5.00	$20.00
				SUBTOTAL:	$20.00

			QUANTITY	COST	TOTAL
MATERIAL	Die Board		1.00	$2.00	$2.00
MATERIAL	Punches	desc1	2.00 Sheet	$3.00	$5.00
				SUBTOTAL:	$8.00
				TOTAL COST:	$28.00

PRINT DATE:	10/29/2012	8:21:15AM	Signature _____	Qa 101c - Dieshop Tooling Cost Form Revision 6
U200039			Without approving signatures this form is valid 7 days from	Originating Date: 10/15/2012

Email Notification:

- Each week an email will be sent to Quality Engineers, Program Managers, Plant Controllers (per facility), and Cost Accountants (per facility) listing all closed TAs during the past week.