

## Action Request Management

### Action Request Management with Pulse PLM

Changes to product design occur frequently in high tech engineering environments. Whenever a company creates a product, it has to be defined and its definition will need to be kept updated as changes take place. Rapidly managing, communicating and incorporating, product design changes requests or product design change orders improves product manufacturability, reduces scrap and rework, and improves material and resource planning.

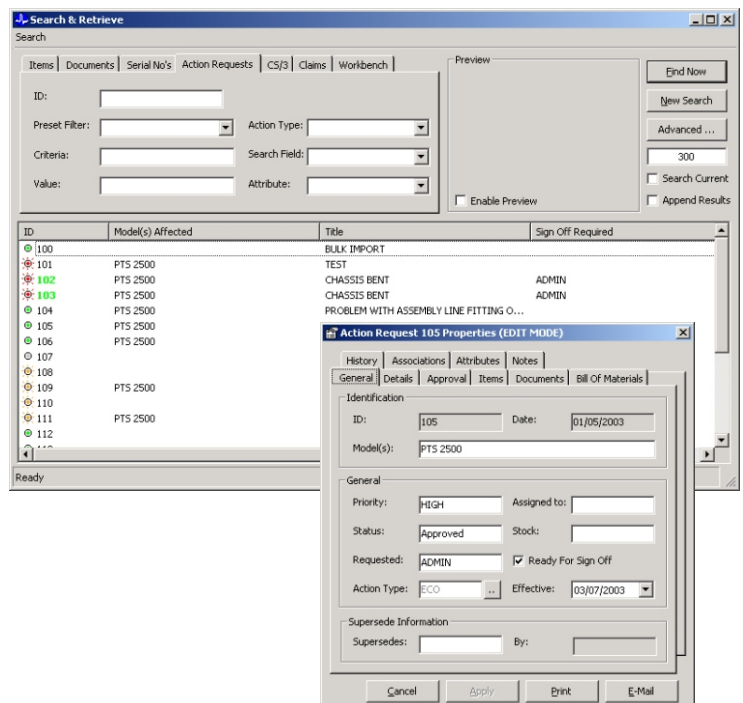
A paper based change management system is a slow, cumbersome and inefficient way to manage the change process. The change notice and associated documents can become damaged or lost as the file is passed among various departments for approval. Users involved in the change process will experience frustration as an incomplete change request is placed before them. Complete information and timeliness are crucial for the efficient processing of change requests.

#### The Pulse PLM Solution

Pulse provides a solution to this problem with a totally customisable solution to manage the collection, review and authorisation process of the creation and revision of items and documents. Instead of routing a document through a series of approval and review stages, the actual issue is sent via a determined workflow process. Documents, files and other information is attached to the change issue and it is this information package that is routed throughout the necessary channels.

#### Action Requests

Pulse Systems call these change issues 'Action Requests'. Our view is that for every action carried out by an individual within the company, there needs to be a reason for doing so. Be that to change the length of a part, modify a description, change a sales brochure, whatever the action there is a reason. The Systems Administrator can set up an infinite and varied set of Action Request types. Action Request types could be



familiar ones such as Corrective Action Request, Engineering Change Request or Engineering Change Order. Each of these Action Requests types will have their own sign off groups, approval groups, notification groups etc and each group will receive a notification of an action pending or an action completed via the Pulse PLM system email. The Action Request can be simple with only a few individuals in the workflow or it can be complex with many personnel required to review each step of the Action Request process.

#### Easy Action Request Creation

Action Requests can be created very easily, with only a tiny amount of data initially required. The system will automatically assign a new Action Request number and once the user has entered a description and assigned an Action Request type, the Action Request has been set up.

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### Easy of Use

Once the Action Request has been created, their use is very easy indeed. Like was said before there must be a reason why an individual carries out an activity. The Action Request Manager states the reason and then records the actions taken. At the end of each task wizard the user is prompted to enter a open Action Request number. They are given a list of open Action Request numbers and brief descriptions from which to choose from. Selecting an Action Request will associate that particular activity to the Action Request.

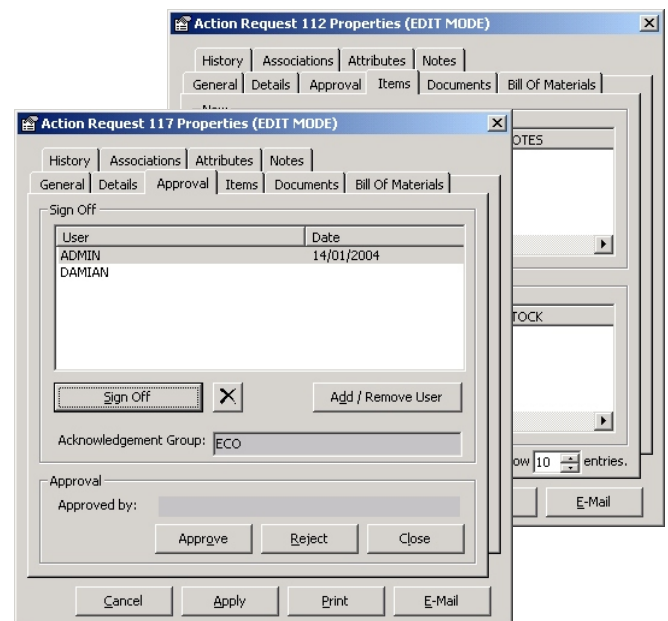
For example, should the user change a part length and revise the part in the process, the Action Request selected at the end of the Revision wizard will now note the old and revised part's details. This information will be contained within the Action Request's property page.

### Action Request Property Pages

The Action Request property pages contain detailed information on the Action Request itself, item, document and Bill of Material changes and provides the means to approve and sign off the order. At a glance you can see which parts or documents were changed as a result of the particular Action Request. These fields are populated automatically when the Action Request is referenced at the end of each of the task wizards. Bill of Material changes are also recorded automatically.

### Electronic Sign Off

Users in the sign off group can add their electronic signature to the Action Request to indicate that they have reviewed the request and are happy with any recommendations in the request. Authorised users may then 'Approve' the Action Request and revise the status of any parts or documents created as a result of the Action Request.



### Clear Benefits

Companies will enjoy many benefits with a successfully implemented change management system using the Pulse PLM Action Request Manager. Managers and design personnel will have more time for value added activities, such as designing innovative product, with an electronic change process in place. Product improvements can be identified and processed much faster with an electronic change system and as a result the improvements and possible cost reductions will be made effective much earlier.

Customers will be more satisfied as they will see their design suggestions incorporated in the final design quicker. Speed, accuracy, traceability, will all be improved using the Pulse PLM Action Request Manager.