Intelex Technologies

SQ Escalation

Nexteer User

V1 13JL2016

INTELEX

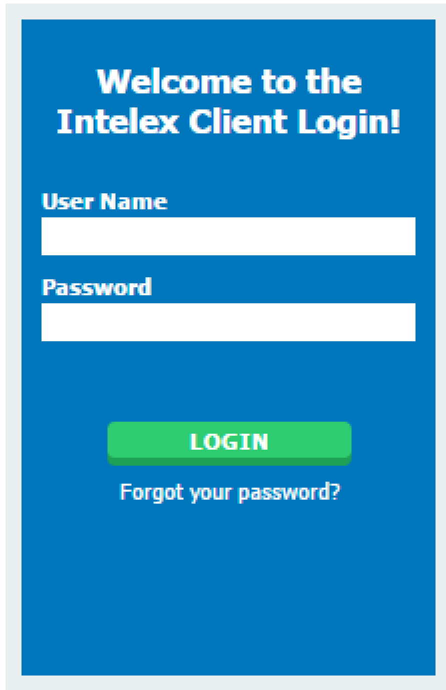
Table of Contents

Logging into Intelex ... 3
Forget your password ... 4
General Navigation ... 5
Locations Dropdown ... 5
Applications Dropdown ... 6
Toolbar ... 6
My Tasks ... 7
Escalations Overview ... 7
Definitions ... 7
Levels Overview ... 8
Tasks Overview ... 8
Escalation Records ... 9
Inventory View ... 9
Suggesting an Alternate Escalation Level ... 10
Possible Errors ... 12
Promoting to Suggested Level ... 13
Rejecting Suggested Levels ... 14
Escalation Tasks ... 15
Completing Tasks ... 16
Possible Errors ... 17
Reviewing Supplier Completed Tasks ... 19
Rejecting Supplier Completed Tasks ... 20
Action Plans ... 21
Creating an Action Plan ... 21
Reviewing Action Plans ... 22
Rejecting an Action Plan ... 24
Feedback/Change Request ... 26

Logging into Intelex

To start working with the Intelex site and the SQ Escalation Application, follow the steps below:

1. Type the following URL into any Internet browser: https://clients.intelex.com/login/Nexteer.
2. You will then be presented with your Intelex login screen.

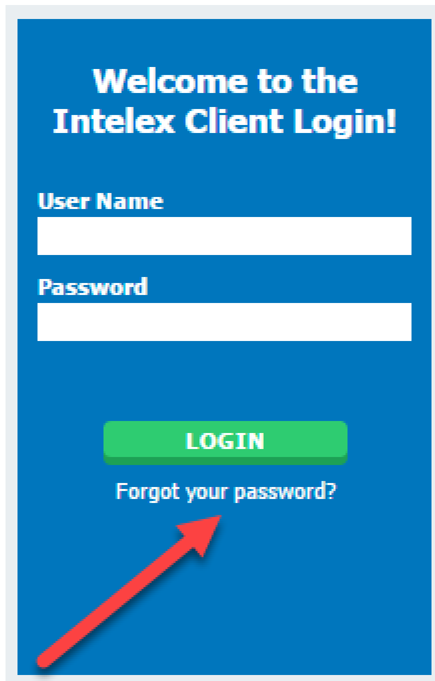


3. Enter your User Name and Password into the fields provided.
4. Click the green **Login** button.

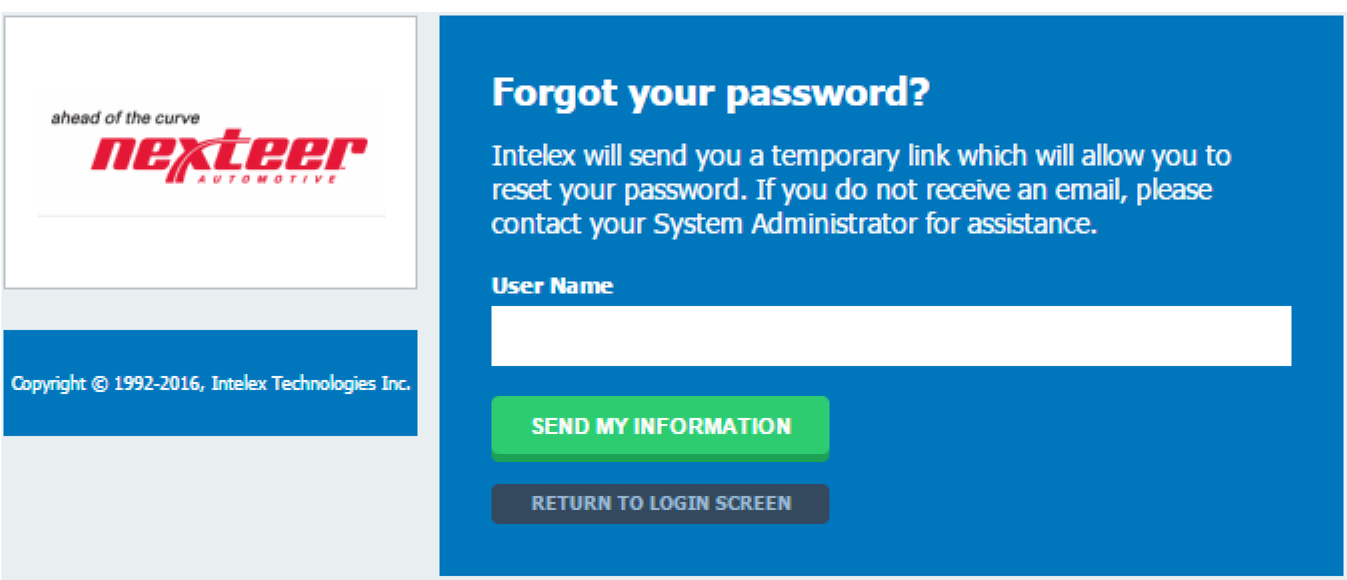
Forget your password

If at any time you forget your password, follow the steps below to have your login information sent to you in order to sign in again.

1. Click on the hyperlink below the login button field



2. Enter your User Name in the space provided and select the **Send My Information** button to have an email sent to you with your login credentials.

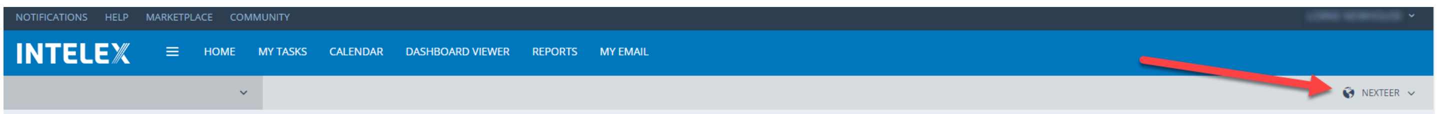


General Navigation

There are a few areas within the system that you should be aware of in order to navigate through Intelex.

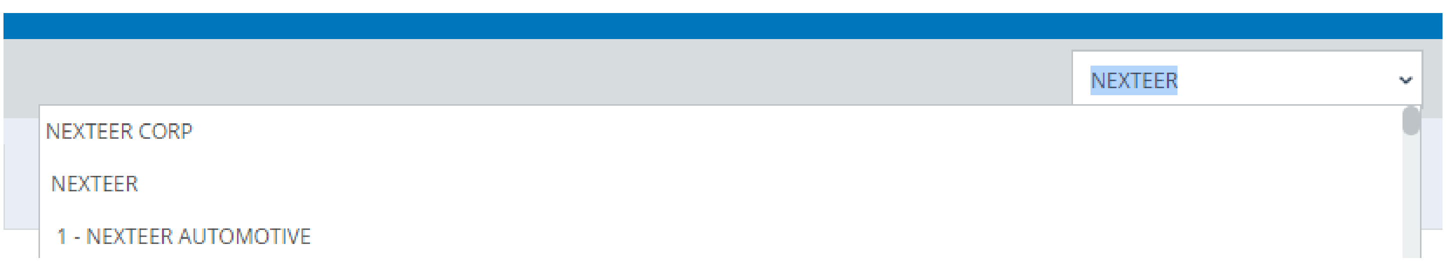
Locations Dropdown

One of the first things you'll notice when you first log in to the Intelex system is the locations dropdown. This is found in the top right hand corner of the screen. From here you should see your logon location.



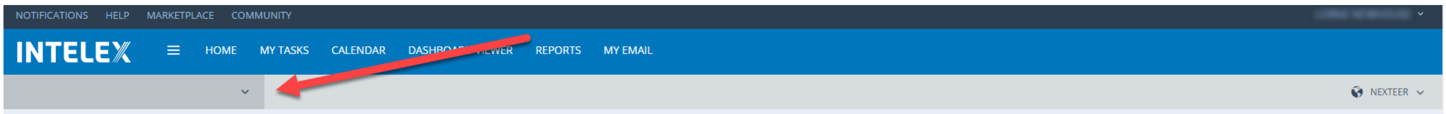
If you click on the location name, it will appear as a white dropdown box.

Clicking on this will now open the dropdown to display the location structure for Nexteer. To view a specific Supplier Record, select the Supplier Name in the drop down prior to accessing the SQ Escalation Application. If no supplier name is selected the user will see all registered suppliers.

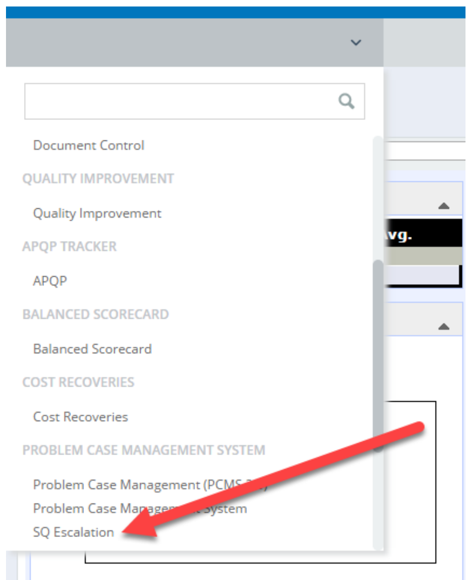


Applications Dropdown

Click on the gray dropdown in the top left hand corner of the screen to open the applications menu.



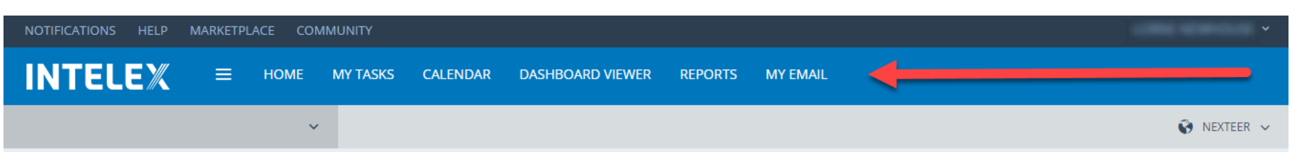
To access your Escalation Records, select the SQ Escalation application from the list.



Once the application loads you will see a list suppliers and records sorted by escalation levels. From here you will be able to see current and suggested levels, as well as edit the records and suggest alternate levels.

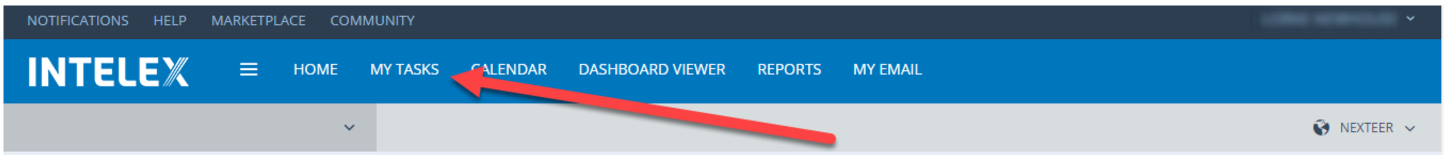
Toolbar

In the center of the page, as part of the header, you will see a toolbar. This toolbar displays words that are quick links, which will allow you to navigate from page to page within the system. Since it is on the header of the page it will display regardless of the area in the system you are working with and can be used to navigate to another page in the system. Please note that toolbars are configurable and you may see changes made to your default toolbar.



My Tasks

My Tasks Summary page is accessible from the toolbar at the top of each page. This page will display all actions that you are responsible to complete. From here you will be able to see the due date, task type and description of a task. You will also be able to complete a task right from this page by selecting the description hyperlink. Whenever you are assigned a task you will also receive an email notification informing you of this new task. If you navigate away from this page and would like to be directed back, simply select **My Tasks** icon from your toolbar.



Escalations Overview

Definitions

Active Level: The actual escalation level assigned to the Supplier. There are specific tasks required for each level.
CPM: Complaints Per Million pieces received (Complaint Rate).
PC: Problem Cases. Additional Problem Cases may cause the escalation level to be raised.
PCMS: Problem Case Management System. Application within Intelex to manage problem cases.
SQE: Supplier Quality Engineer. The Nexteer Employee assigned to the supplier.
SQEP: Supplier Quality Escalation Process. Initiated when Problem Cases are recorded.
Suggested Level: The level that is recommended by the Intelex application based on the number of Problem Cases or by Nexteer personnel.
Tasks: The items assigned to the suppliers that need to be completed before the SQEP record can be closed.

Levels Overview

The Escalations Application is used for suppliers and Nexteer personnel to view and update supplier escalation levels. The SQEP application continuously monitors issued problem cases (Part Quality, APQP Activities, Packaging/Dunnage) in any rolling six month period and provides a suggested escalation level based on the following information:

a. **Level 0**: The supplier has 1 PC
b. **Level 1**: The supplier has 2 PCs or 1 OEM Customer Impact PC
c. **Level 2**: The supplier has 3 PCs
d. **Level 3 (TFS)**: The supplier has 4 or more PCs

These are only the suggested levels. To make changes to the active levels, approval is needed from the SQE, SQ Manager, or SQ Director depending upon level. After 180 days of being in level 0 without any new problem cases, the record will be closed from SQEP (Supplier Quality Escalation Process) Records.

Tasks Overview

When the escalation record is promoted to the suggested level, an email notification is sent to the supplier, and additional tasks are assigned. The required tasks will vary based on the level.

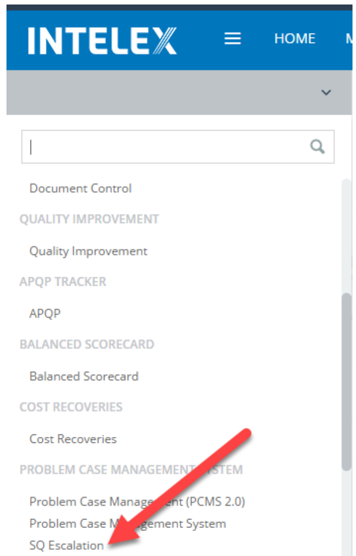
Level	Task	Due
Level 0	PC Closure	Timing based on PCMS
Level 1	QSB Self-Assessment	14 days
Level 2	Level 1 Tasks plus…	
	PFMEA to Control Plan Review	28 days
	QSB On-site Assessment	28 days
Level 3	Level 2 Tasks plus…	
	Acknowledgment	3 days
	TFS Kickoff Meeting	7 days
	Named Trained User	21 days
	DFMEA/DSS to PFMEA to CP Review	28 days

All of the above dates start when the record is promoted by Nexteer. Promoting a record to a higher level does not reset time for previously assigned tasks.

Escalation Records

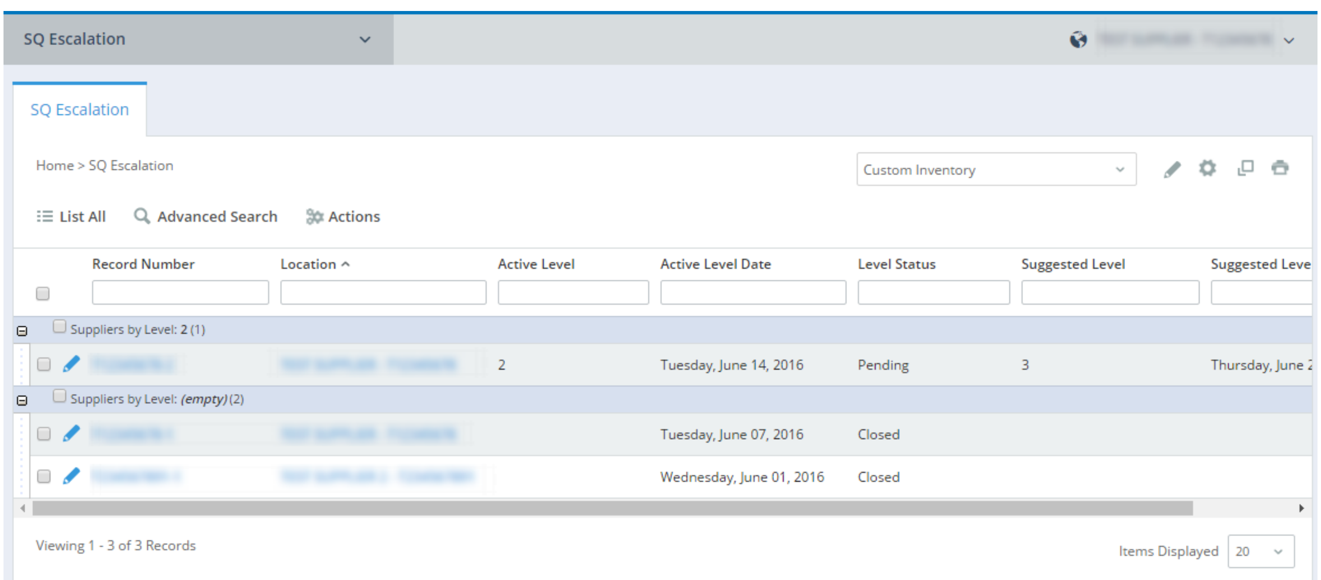
Inventory View

Escalation records can be viewed in the Inventory View, accessed by selecting the SQ Escalation Application from the gray dropdown menu located below the Intelex logo at the top of the page.



*Note SQ Escalation Records can also be accessed through the PCMS 2.0 menu.

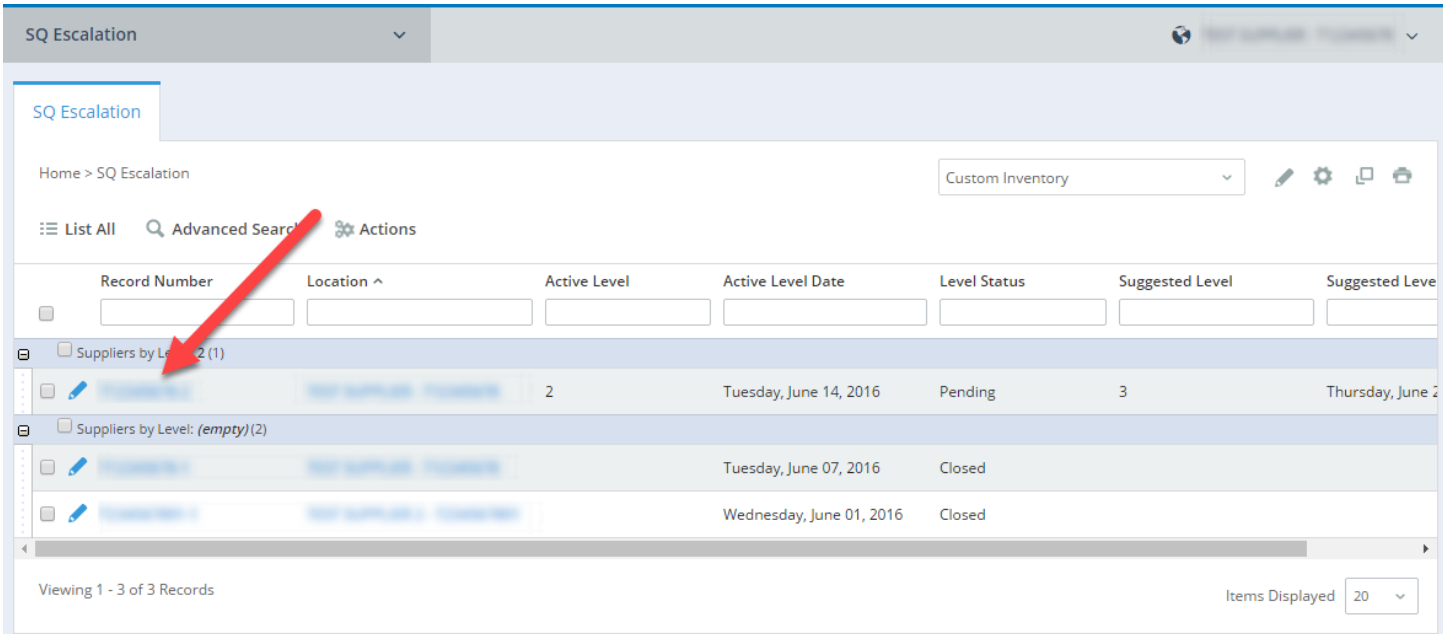
In the Inventory View, suppliers and records will be sorted based on their Active Level. Clicking on the Record Number will open the SQEP Record, while clicking on the Location will open a new window with the supplier's location details.



Suggesting an Alternative Escalation Level

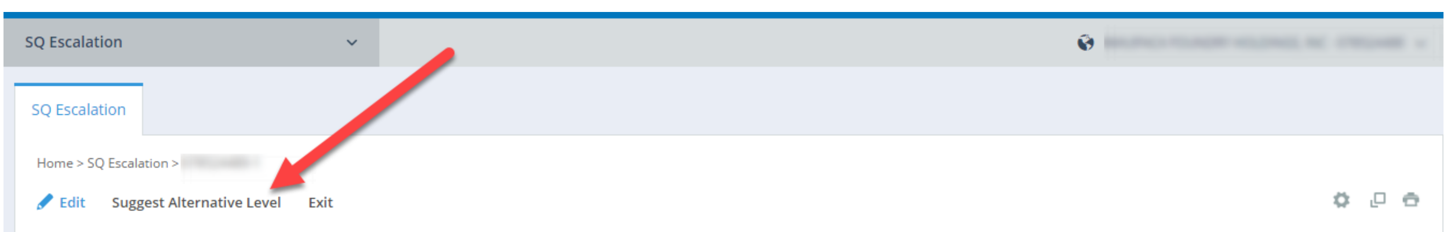
If a Nexteer user believes that a supplier should be placed at a different Escalation Level than what has been suggested by the application, they can suggest an alternative level. This may be done for a high risk supplier or for repeat poor performance after a supplier exits the process. To suggest an alternate level, follow the steps below:

1. Navigate to the SQ Escalation inventory view
2. Select the Record Number of the record that you would like to update

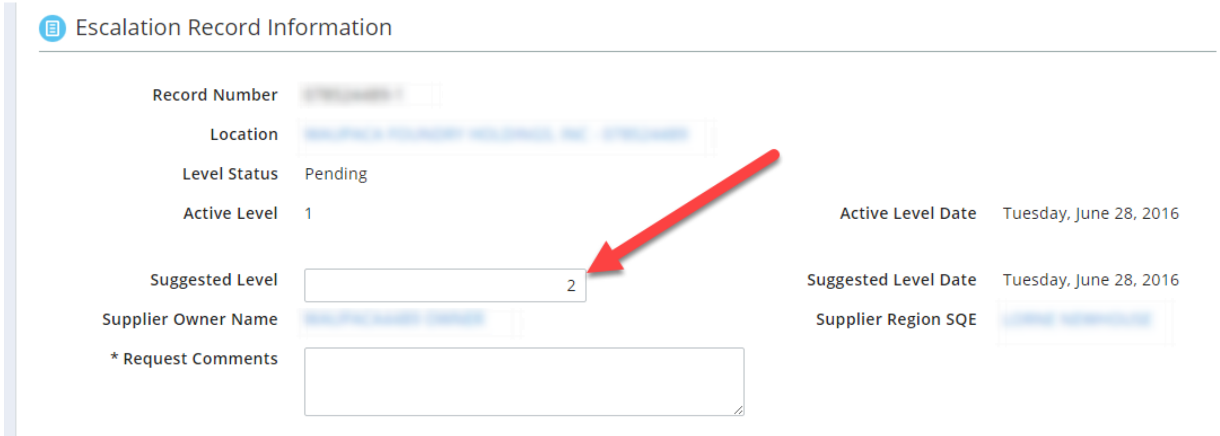


*Note: Clicking on the Location will open a new window with the supplier's location details.

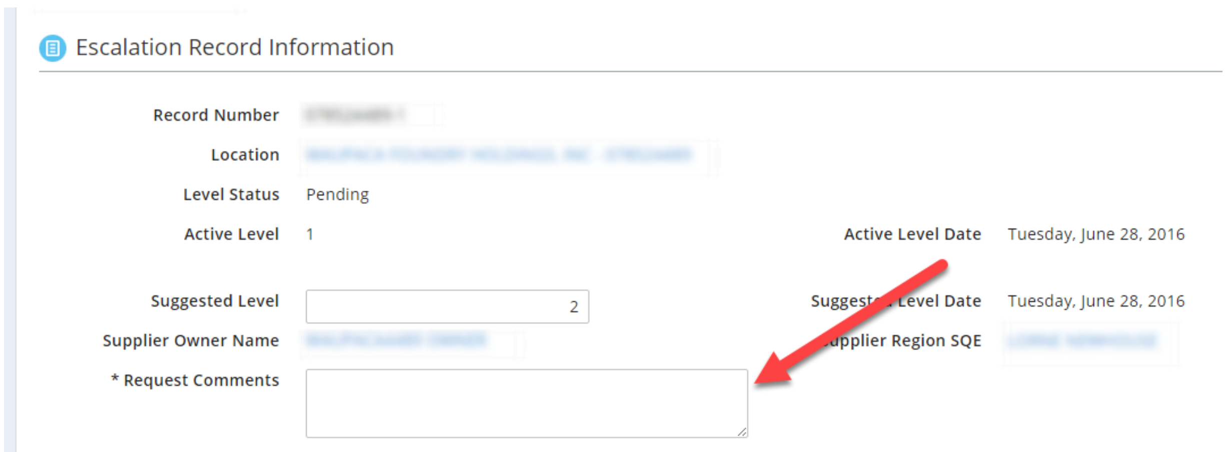
3. Click on **Suggest Alternative Level**



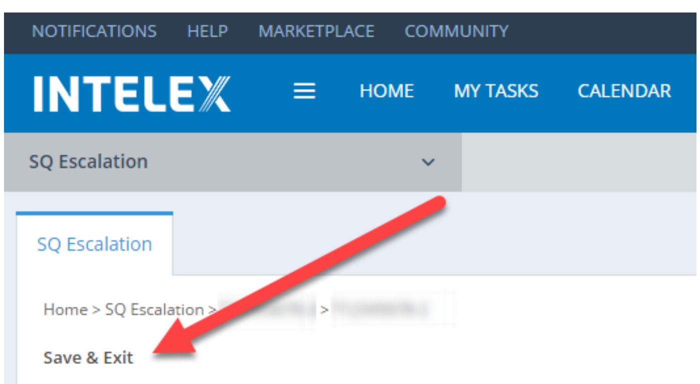
4. Type the level into the **Suggested Level** box located under the Escalation Record Information section



5. Add comments to the **Request Comments** box



6. Click **Save & Exit** to update the suggested level



*Note: Suggesting an alternative level does not update the Active Level, it only changes the Suggested Level.

Possible Errors upon Suggesting Alternative Level

Below is a list of common error messages:

> Please correct the following errors
>
> - Suggested Level - The value for Suggested Level should be between 1 and 3

The only accepted entries for this field are “1”, “2”, or “3”. The application will not accept “0” or words (“one”).

> Please correct the following errors
>
> - Suggested Level - The Escalation Record cannot be saved because the Suggested Level cannot be less than the Active Level

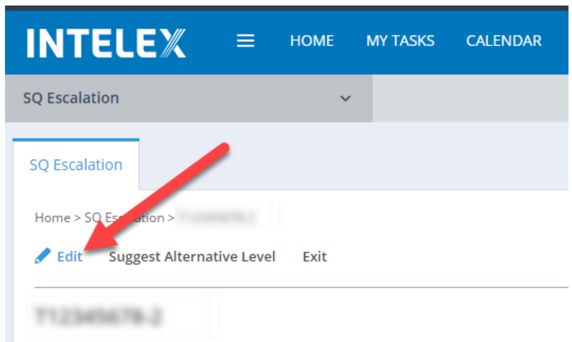
It is not possible to lower the Active Level once a supplier has been promoted to a higher level. Because of this Active Levels will always be greater than Suggested Levels.

Promoting to Suggested Level

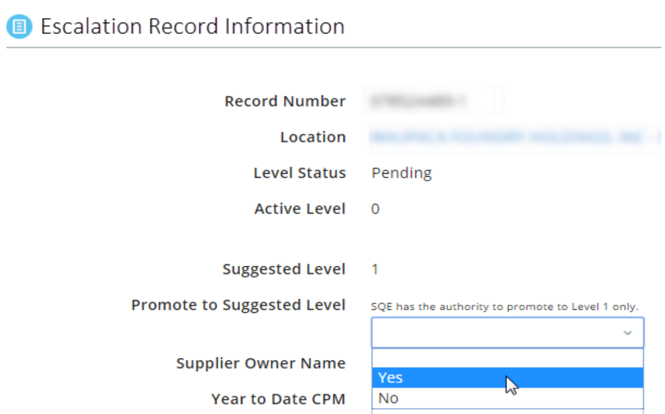
An SQE can promote a supplier from Level 0 to Level 1 without additional approval from a SQ MGR. An SQ Manager can promote to a Level 2 without additional approval. The SQ Director can promote to a Level 3 at any point. If the suggested level is changed to a higher level, the appropriate SQ approver is still required.

To promote a supplier to the suggested level, follow the steps below:

1. Navigate to the SQ Escalation inventory view
2. Select the Record Number of the record that you would like to edit
3. Click on **Edit** near the top of the window



4. Change the “Promote to Suggested Level” dropdown to “**Yes**”



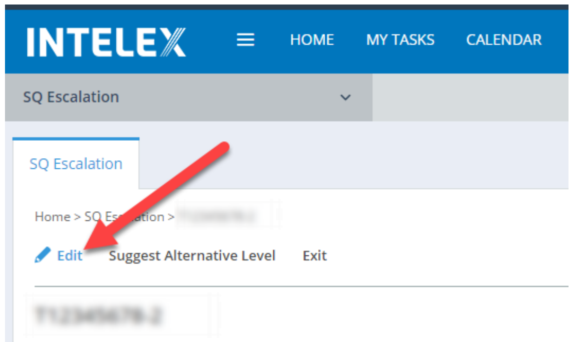
5. Click **Save & Exit** to save the changes

Promoting a SQEP record will add the required tasks to the Escalation Tasks based on Active Level as well as remove the suggested level value, and update the active level.

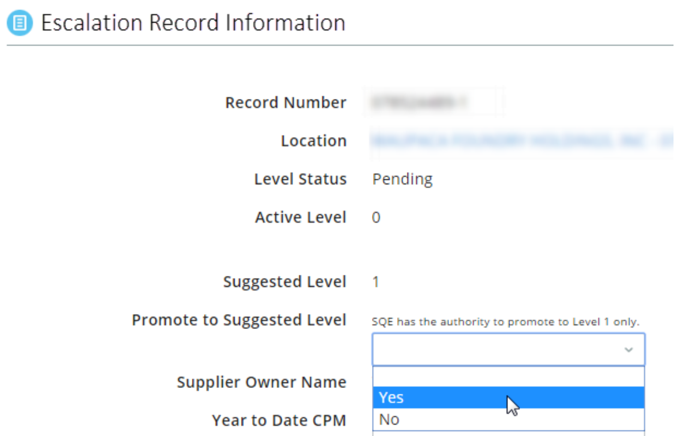
Rejecting Suggested Levels

To reject promoting a supplier to a suggested level, follow the steps below:

1. Navigate to the SQ Escalation inventory view
2. Select the Record Number of the record that you would like to edit
3. Click on **Edit** near the top of the window



4. Change the “Promote to Suggested Level” dropdown to “**No**”

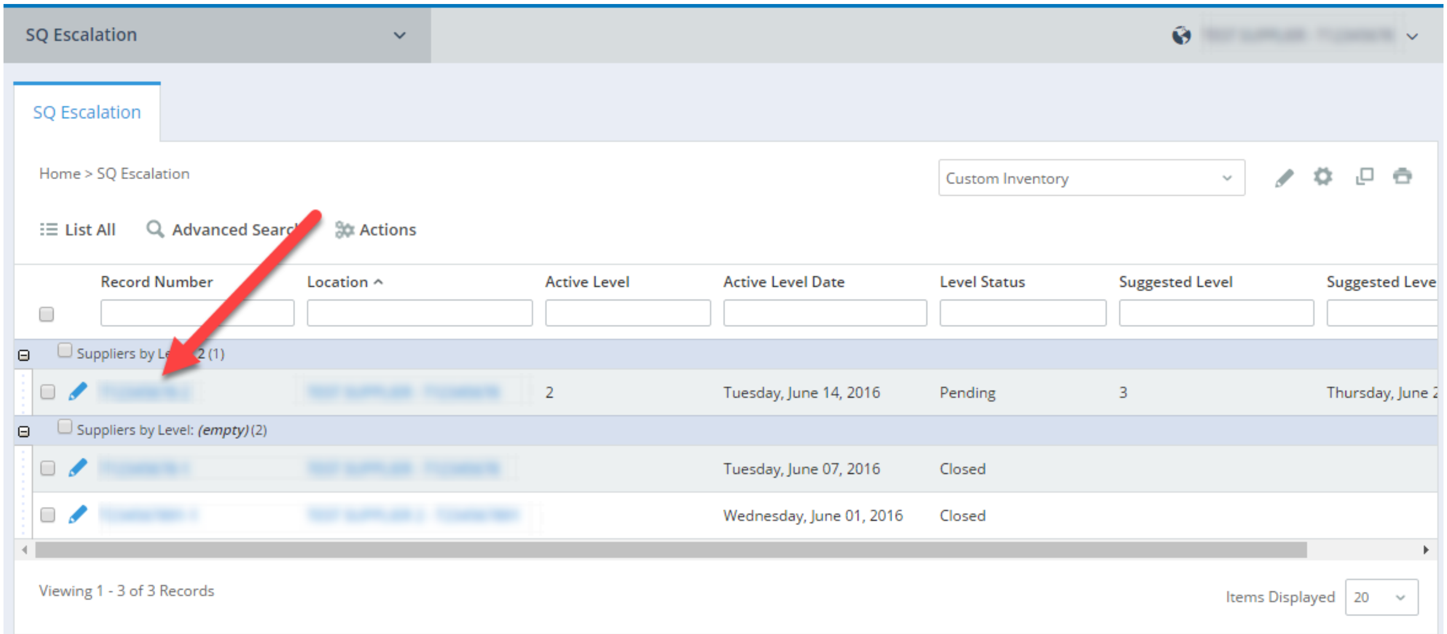


5. Enter the reason for rejecting the level promotion into the comment box
6. Click **Save & Exit** to save the changes

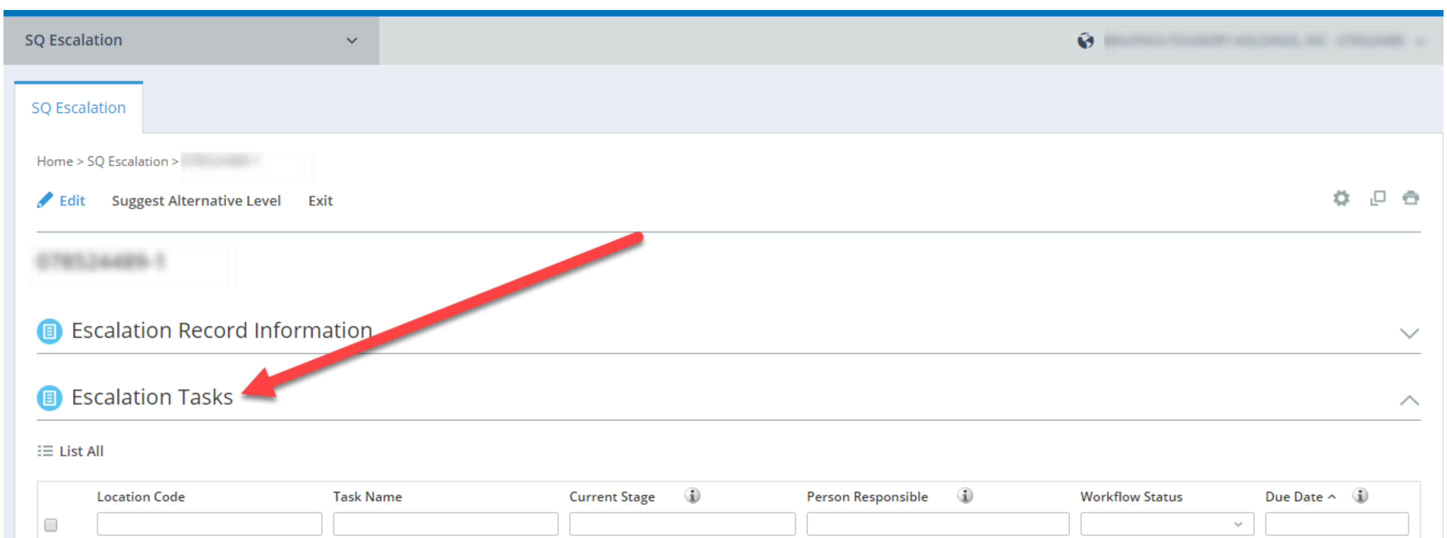
Escalation Tasks

Each time a supplier is promoted to a higher escalation level, additional tasks will be added to the record. See the Overview for tasks associated with each level. To view Escalation Tasks, follow the steps below:

1. Navigate to the SQ Escalation inventory view
2. Select the Record Number of the record that you would like to view



3. Escalation Tasks will be the second item, located below Escalation Record Information

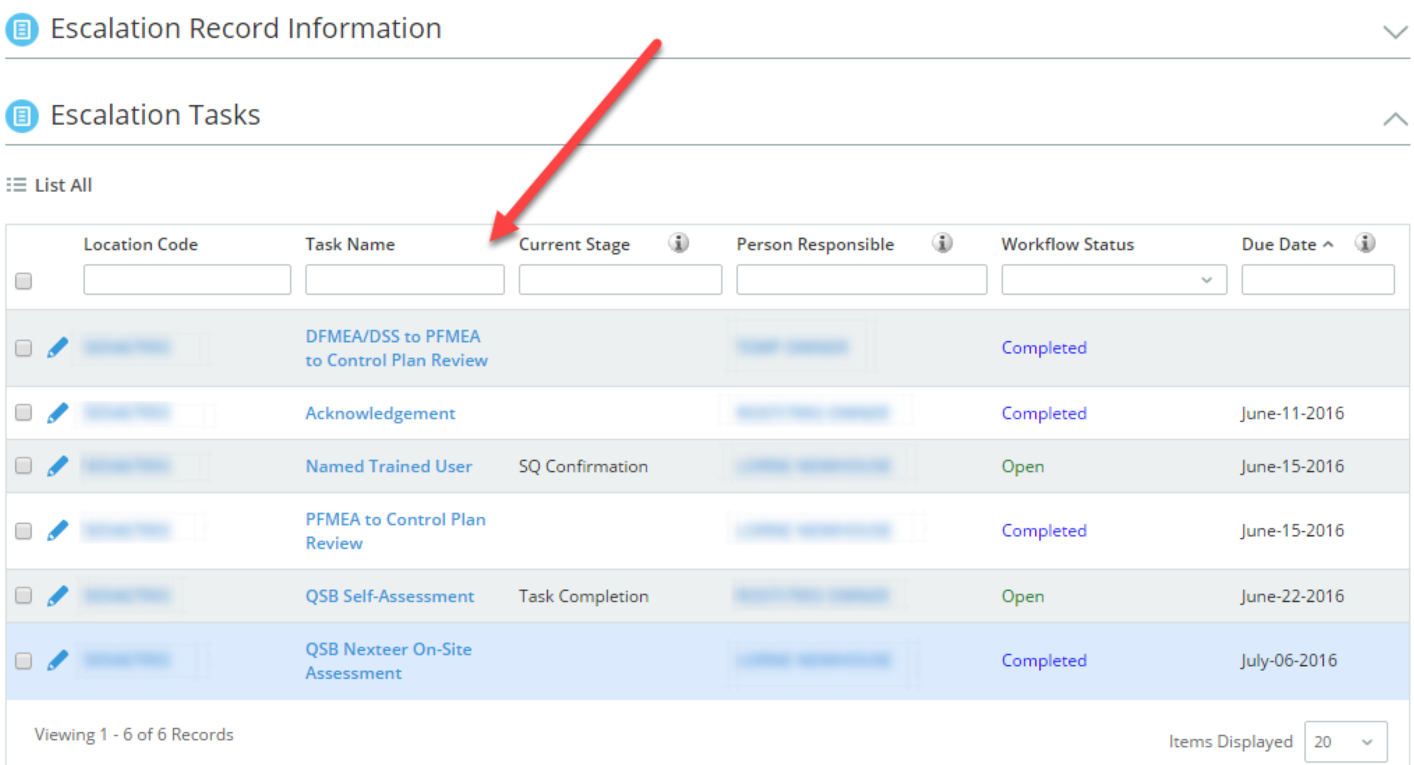


*Note: Any Escalation Tasks owned by the logged in user can also be viewed by clicking on **My Tasks** in the Intelex toolbar located at the top of each page.

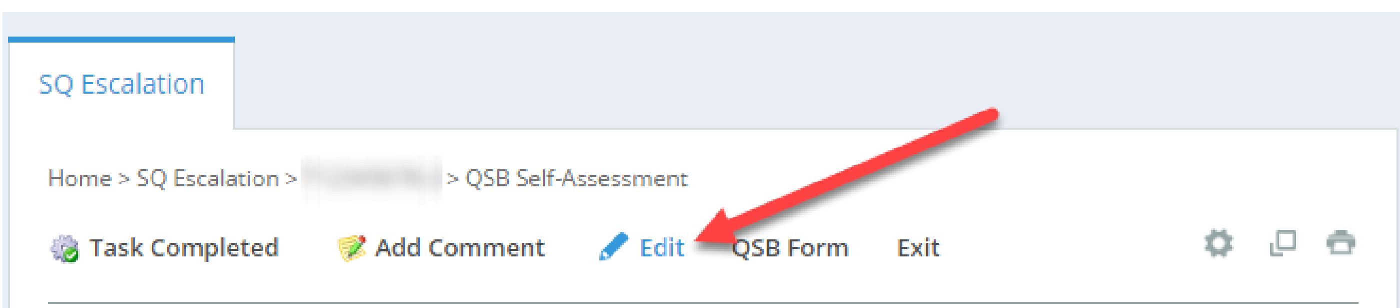
Completing Tasks

Nexteer SQEs are responsible for completing the QSB On-Site Assessment and TFS Kickoff Meeting Tasks. To complete the Tasks:

1. Navigate to the Escalation Tasks
2. Click on the Task Name of the task you would like to complete

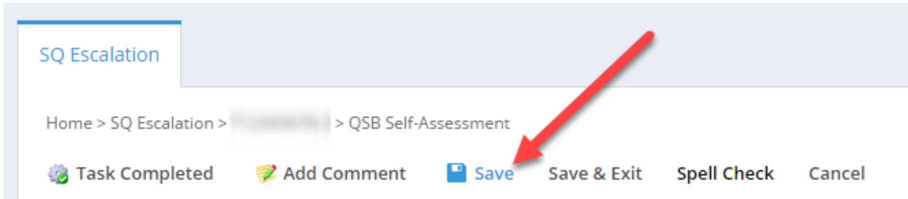


3. Select **Edit**

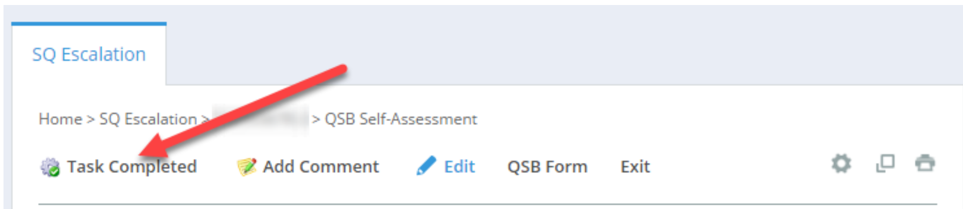


4. Fill in all required fields (denoted by an *)

5. Click **Save**



6. When finished, select **Task Completed.**



7. When a supplier completes their task, the Nexteer SQE is required to confirm that required evidence has been provided and that the task can be closed.

Possible Errors

Below is a list of common error messages:

> Please correct the following errors
>
> - QSB SA Audit Date - The value for QSB SA Audit Date is mandatory.

Above is an example of an error that the supplier may receive. If you do not select an Audit Date for the QSB Onsite Audit you will receive a similar message. A date for the Audit needs to be selected. To do this, click on the field and then click on the corresponding date.

> Please correct the following errors
>
> - Fast Response Score - The value for Fast Response Score is mandatory.

A field was left empty. A score must be entered into every field. If the score is 0, enter a “0” instead of leaving the field blank.

> Please correct the following errors
>
> - Fast Response Score - The value for SA Fast Response Score should be between 0 and 24

Appropriate scores for each field are indicated above each box. If the score is too large, double check to make sure the entered score is correct.

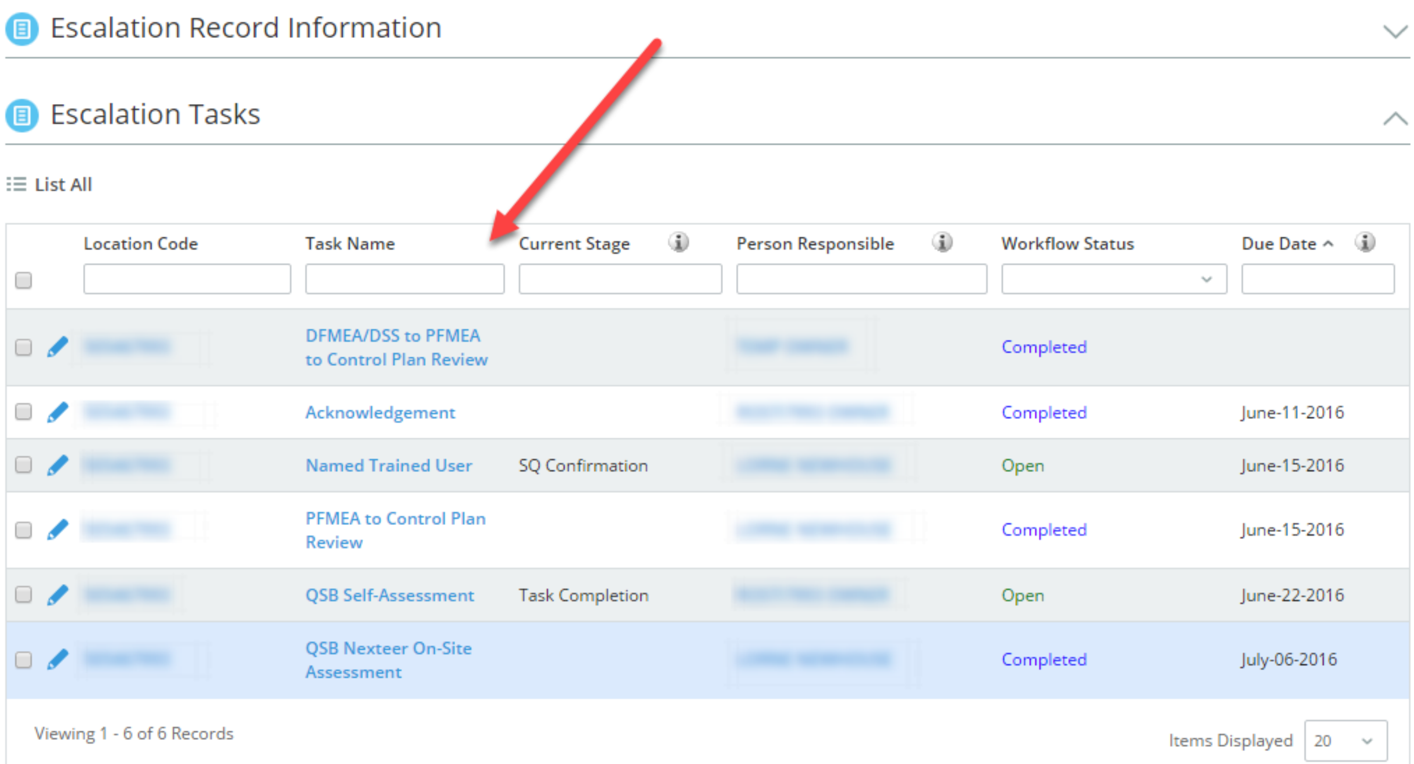
> Please correct the following errors
>
> - Error - Please click on Edit and enter the required information!

If you try to click on **Task Completed** without entering information into required fields (denoted by an *) you will receive this message. Click on the **Edit** button and enter all the required information.

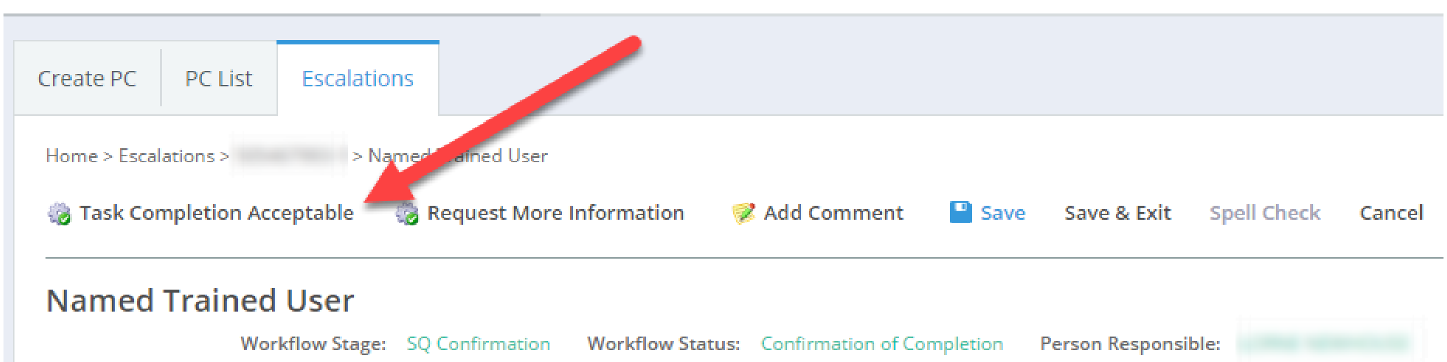
Reviewing Supplier Completed Tasks

Once you are satisfied that a supplier task has been completed:

1. Click on the **Task Name**



2. Click **Task Completion Acceptable**

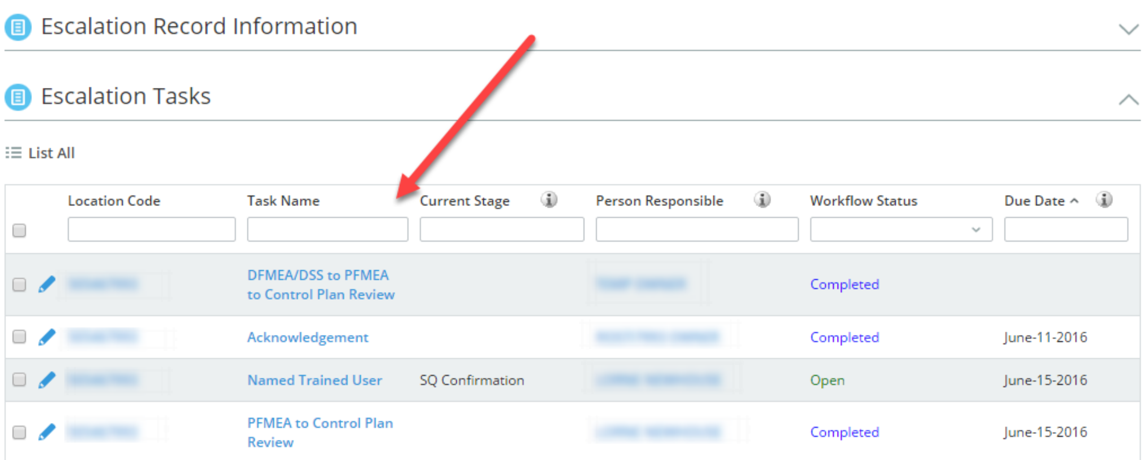


3. The task status will change from “Open” to “Completed”. Note: If Open Action Plans exist for this Task, the status will change to “Awaiting Action Plan Closure” and the task will remain Open until all Action Plans are closed.

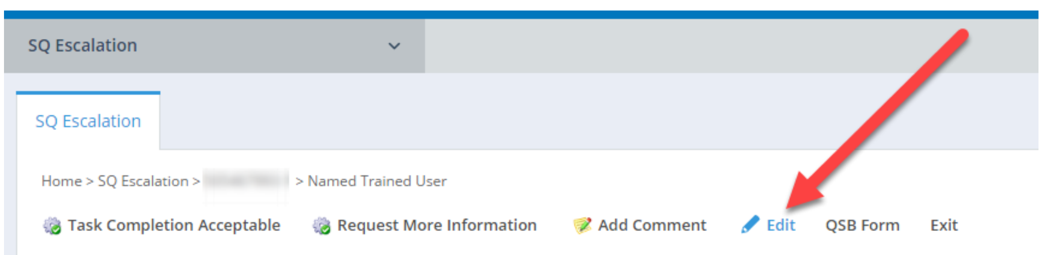
Rejecting Supplier Completed Tasks

If the information provided by the supplier to complete the task is not acceptable the task should be rejected. To reject the task:

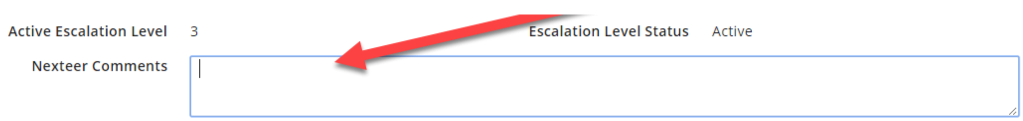
1. Click on the **Task Name**



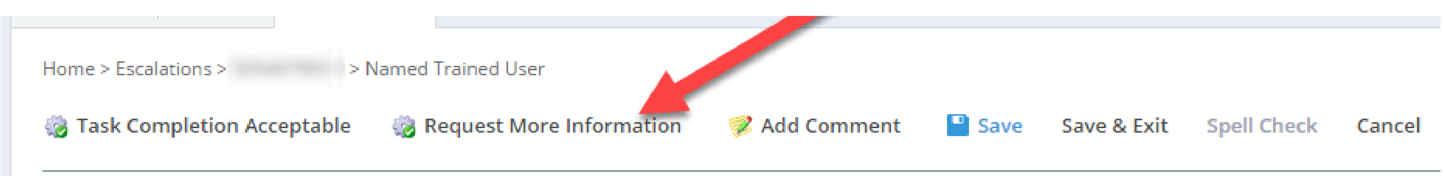
2. Click the **Edit** button



3. Enter comments in the box next to "Nexteer Comments". Please provide specific detailed comments as to why the task is being rejected so the supplier understands the required corrections.



4. Click **Save**
5. Click on **Request More Information.** Note: This will send the task back to the supplier.



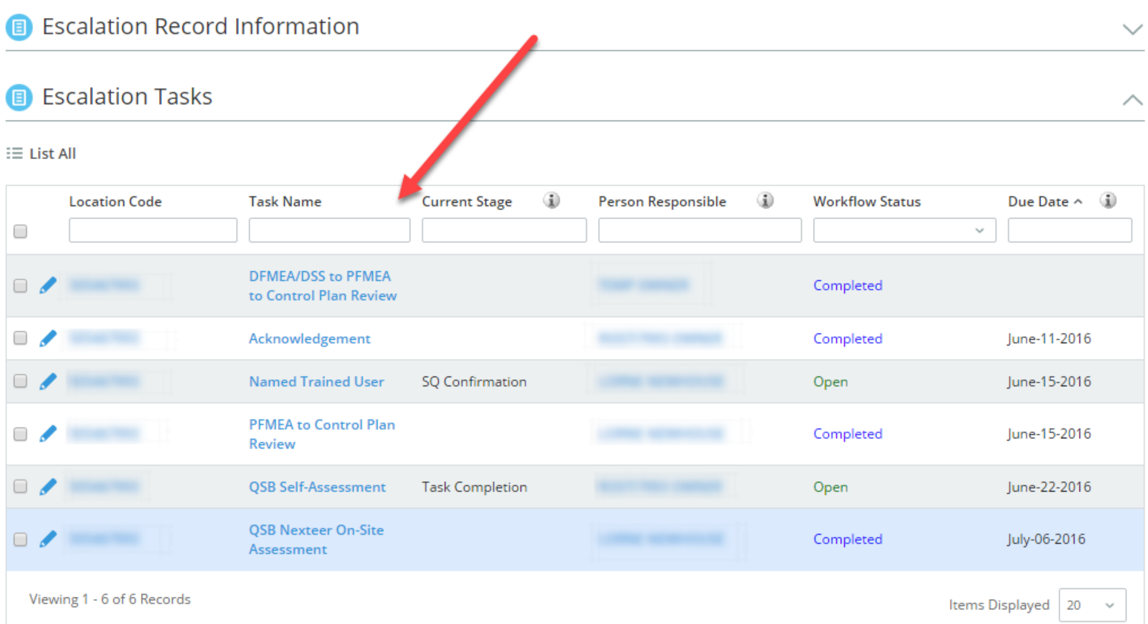
You will get an error if you try to request more information without adding a comment. Note: You will not be able to reject the task once the status is "Completed".

Action Plan

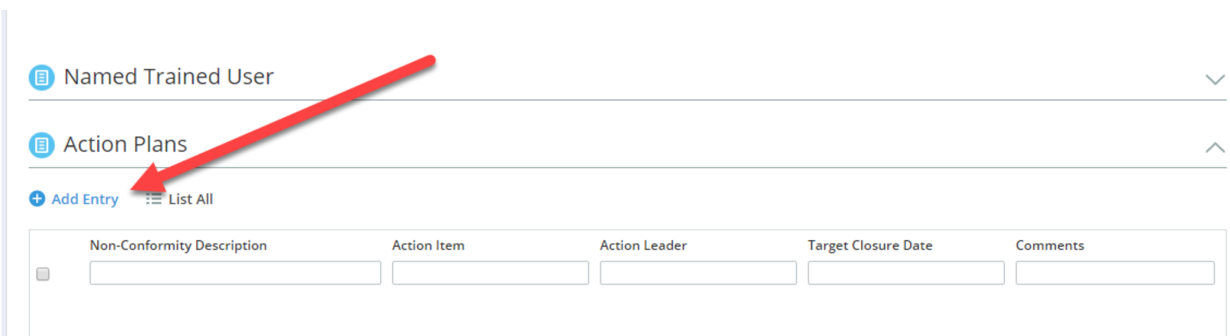
Creating an Action Plan

An action plan can be created using the following steps:

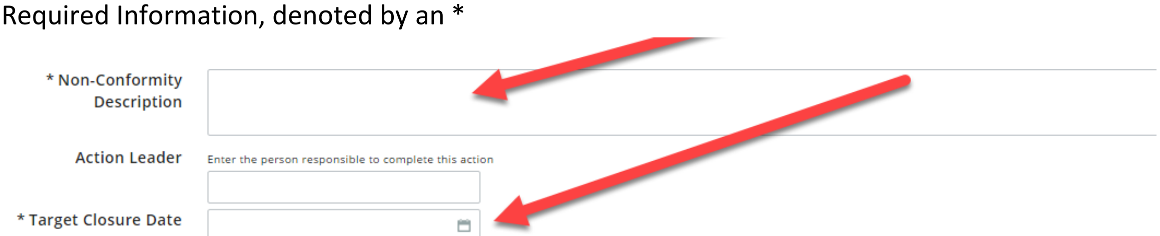
1. Navigate to the Escalation Tasks
2. Open the task you want to add an action plan for



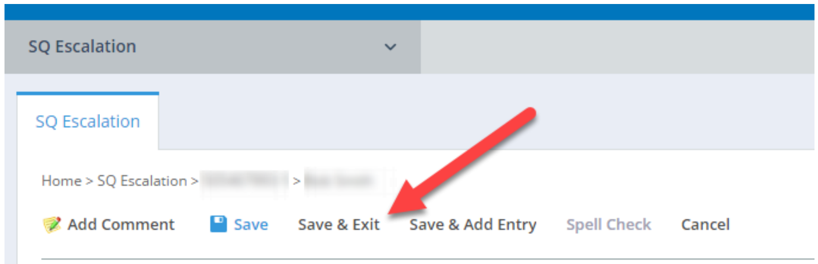
3. Click **Add Entry** under the Action Plans Grid



4. Enter Required Information, denoted by an *



5. Click **Save & Exit**



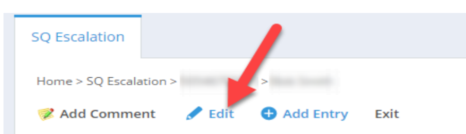
6. A notification will be sent to the supplier telling them of the creation of this Action Plan.

Accepting Supplier Completed Action Plans

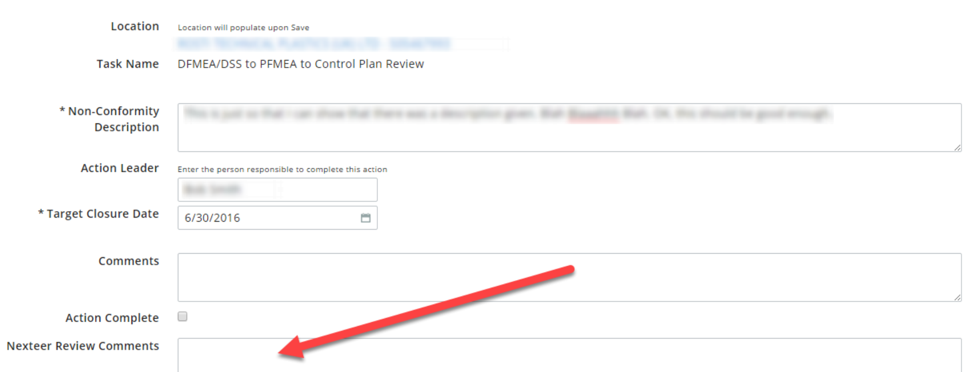
To Accept an Action Plan do the following:

1. Open the Action Plan

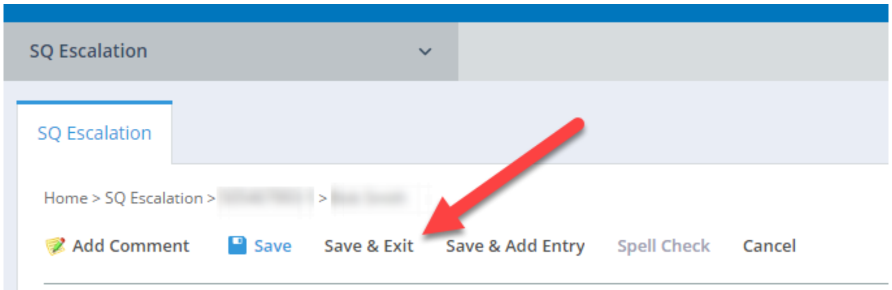
2. Click **Edit**



3. Edit the record and add comments as appropriate



4. Click **Save**

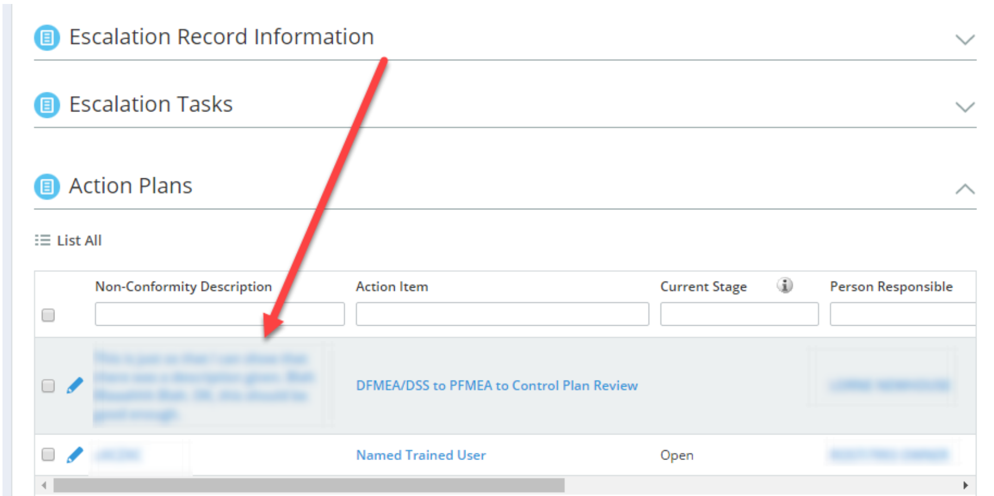


5. Click **Accept Completion.** Note: Tasks that are waiting for Action Plans to close will automatically close upon all open Action Plans being completed.

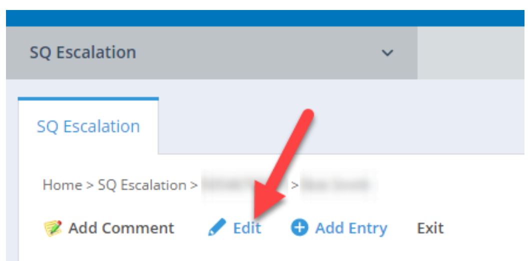
Rejecting an Action Plan

To Reject an Action Plan do the following:

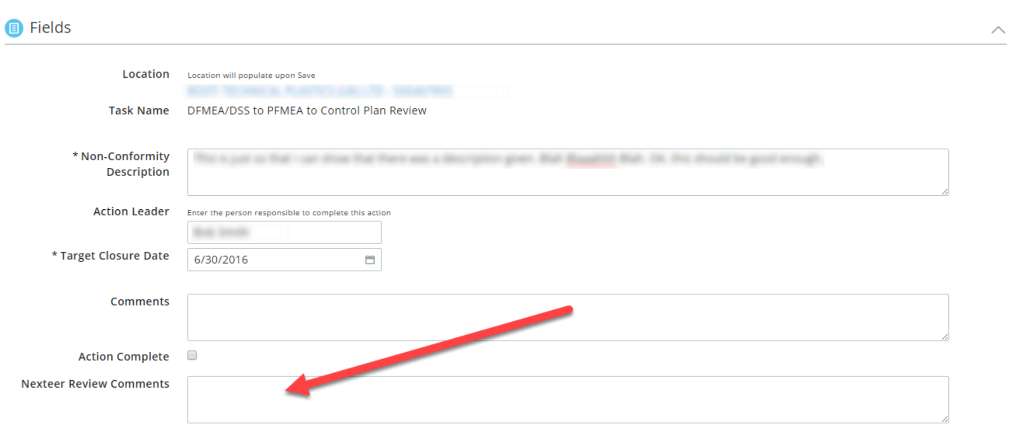
1. Open the Action Plan



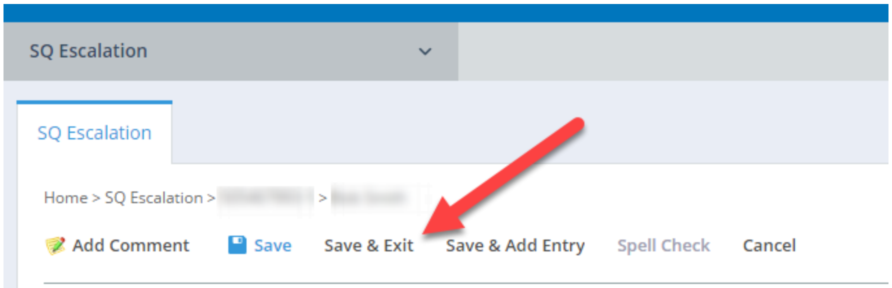
2. Click **Edit**



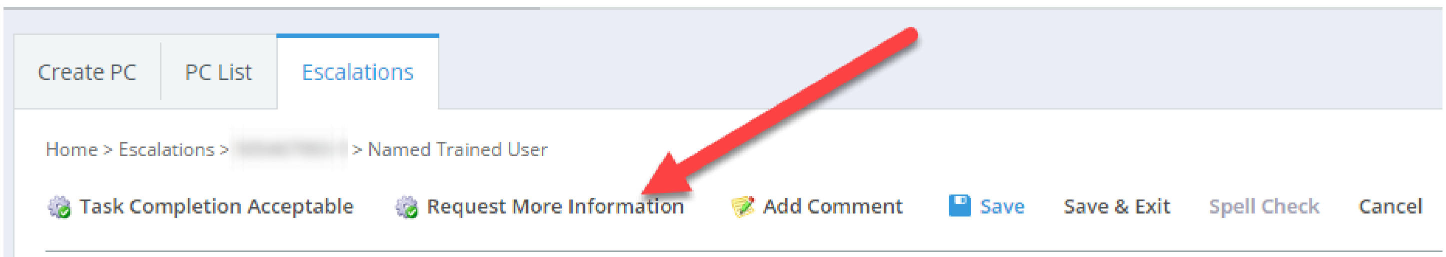
3. Edit the record and add comments explaining the reason for rejection



4. Click **Save**



5. Click **Request More Information**



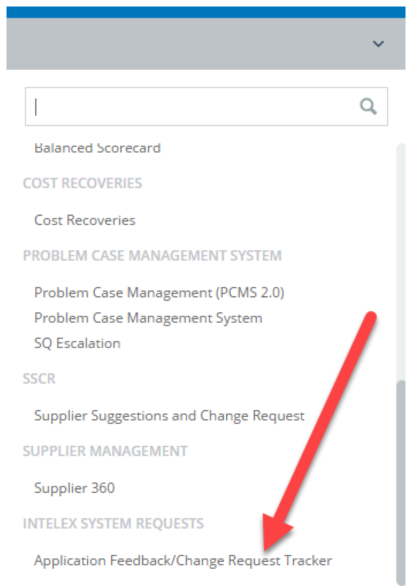
*Note: You will get an error message if you do not enter a reason for rejection in the comment box.

Rejecting the plan will send it back to the supplier to be revised and resubmitted. The supplier may have difficulty revising the plan without useful comments from the SQE.

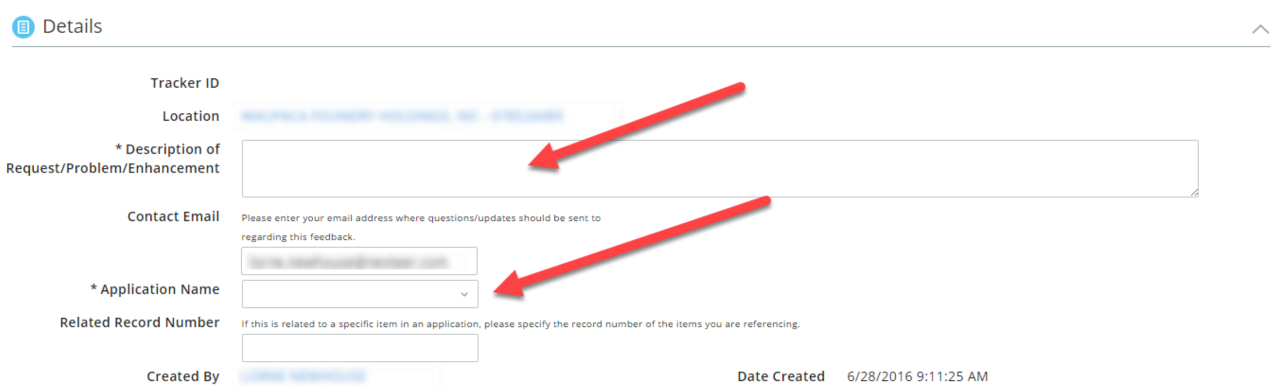
Feedback/Change Request

If you have any feedback or would like to see a change made to the application, you can submit feedback and change requests. This can be done by following the steps below:

1. Click on the gray Application drop down menu
2. Scroll all the way to the bottom and select **Application Feedback/Change Request Tracker** under the Intelex System Requests heading.



3. Enter a description of the problem and application name in the respective comment boxes



4. Click **Save & Add Entry** to submit the request