



Epicor®

Advanced Quality Management

The Power of Enterprise Quality Management Without Increased Complexity

Proactivity is vital to improving quality management. With real-time visibility into quality and compliance—at every step and across all stakeholders—an organization can tip the balance from reactive to proactive. Epicor Advanced Quality Management (AQM) can act as your intelligence gateway into global performance—objectively and truthfully delivering the information you need on all things quality. Reporting and analytics are built into the Epicor AQM solution to provide on-the-fly data visualization and deep analysis of multiple measures, across different processes, and for all levels of the enterprise—providing the insights to help you meet quality objectives.

Epicor AQM provides a powerful and proven solution that offers a unique model for integrating quality processes to achieve superior enterprise-wide performance. It helps companies become more competitive and profitable, achieve and maintain compliance with industry standards—like ISO 9000, TS-16949, AS 9100, ISO 14001, ISO 13485—and reach validation faster and at a lower cost than other solutions.

Instead of being built around the specific characteristics of any one of a number of general and/or industry-specific quality standards, the Epicor AQM solution is designed around the needs of complex business processes. Epicor AQM extends your Epicor ERP solution and begins with functions for managing supplier, customer, and employee information and activities. It continues with modules designed to administer documentation relevant to quality systems and manufacturing processes, as well as product data management and analysis. Additionally, Epicor AQM allows you to identify and track employee training and skills management, documentation management, and risk management.

On the operations level, Epicor AQM includes modules for preventive maintenance and device calibration, as well as complete inspection, data collection, and statistical process control (SPC) capabilities. The system provides for the tracking of non-conformances (NCMs) and the means for issuing and handling corrective actions.



Transform the way you Manage Quality and Compliance Processes

The adoption of technology in support of transformation is the foundation key to achieving and sustaining long-term success. It needs to fit your organization's needs today and offer an extensible architecture for the future.

The newest release of Epicor AQM is built on the Trubox™ platform, which is a next-generation, browser-agnostic application that enables users to move beyond data management into a state of actionable intelligence. Epicor AQM remains faithful to its roots by providing organizations out-of-the-box, best-practice Enterprise Quality Management Software (EQMS) core tools for peace of mind and rapid deployment, but the Trubox platform also opens up multiple possibilities beyond this important objective. Additionally, connecting and integrating Epicor AQM with other enterprise data sources is made simple with a new open plugin and integration toolset.

The new Epicor AQM delivers rapid user onboarding due to mobility and personalization of workspaces, built-in analytics with on-the-fly charts for instant data visibility, and an extendible architecture engine for powerful IT expansion and business system integration. In addition, with many organizations pursuing cloud-first new application policies, it offers a security-hardened, performance-assured hosted environment.

Key Benefits of the Trubox Platform

- ▶ Usability with more personal and intuitive design and flexibility
- ▶ Extensibility that empowers you to add processes and workflows beyond quality
- ▶ Interoperability using integration and plugins to harmonize your EQMS systems
- ▶ Compatibility across devices

Solution Features

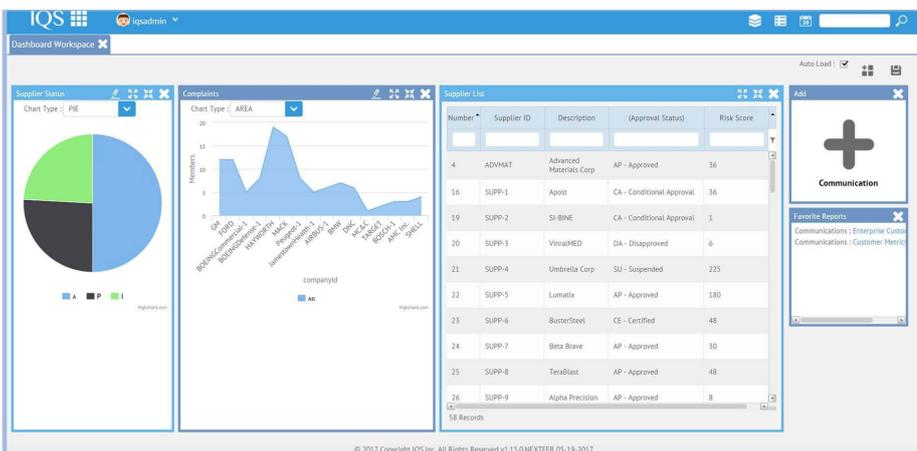
Audit

Managing internal system audits

The Epicor AQM Audit module can transform the way your organization schedules, executes, acts on, and analyzes internal or external audits. This mobile-ready module is part of a closed-loop integrated system. Use this module to go compliance and truly drive process improvement.

Key benefits

- ▶ Build for a variety of audits—including, but not limited, to internal system audits, layered process audits (LPA), supplier assessments, and third-party audits
- ▶ Ensure findings—including opportunities for improvement—always have follow-up and assign responsibilities, a due date, and trending information for efficient and timely reporting
- ▶ Initiate/automate integrated workflows for managing outcome—including, but not limited, to nonconformance and corrective actions
- ▶ Clone existing checklists/protocols using a template library
- ▶ Track and test employee understanding of new/revised documents, policy awareness, and individual certifications
- ▶ Attribute audit findings and outcome to tolerance thresholds for managing risk both internally and across your partners/suppliers
- ▶ Utilize AQM Mobile to download internal and external audits to your mobile device to complete audit checklists in either online or offline mode
- ▶ Be prepared for regulatory and industry compliance assessments by scheduling internal audits to help ensure conformance with quality standards such as ISO 9001, IATF/TS 16949, AS 9100, ISO 13485, etc.



The new AQM on the Trubox home page provides real-time visibility into the quality and compliance information you need for your business.

Number	(Audit ID)	(Auditor)	Scheduled	Ready for Audit	Due Date	Completion Date	Result
37	A3 - New Process Audit	Don Walker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		04/20/2017	Pass
41	CLAIM-AUDIT-PHASE1 - Phase 1 Claim Audit	David Carter	<input type="checkbox"/>	<input type="checkbox"/>	05/19/2017	05/17/2017	Pass
20	NI-1 - SQA - IPS Vendors - Chapter 1, 2 & 3		<input type="checkbox"/>	<input type="checkbox"/>	05/09/2017		Pending
19	NI-1 - SQA - IPS Vendors - Chapter 1, 2 & 3	Don Walker	<input type="checkbox"/>	<input type="checkbox"/>	05/09/2017		Pending
18	NI-1 - SQA - IPS Vendors - Chapter 1, 2 & 3	Don Walker	<input type="checkbox"/>	<input type="checkbox"/>	05/09/2017		Pending
17	NI-1 - SQA - IPS Vendors - Chapter 1, 2 & 3		<input type="checkbox"/>	<input type="checkbox"/>	05/09/2017		Pending
6	NI-1 - SQA - IPS Vendors - Chapter 1, 2 & 3	David Carter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12/21/2016	01/09/2017	Pass
42	PI_MGMT_AUDIT - Plant 3 Management Audit	Don Walker	<input type="checkbox"/>	<input type="checkbox"/>	05/31/2017		Pending
40	PI_MGMT_AUDIT - Plant 3 Management Audit	Don Walker	<input type="checkbox"/>	<input type="checkbox"/>	05/26/2017		Pending
39	PI_MGMT_AUDIT - Plant 3 Management Audit	Don Walker	<input type="checkbox"/>	<input type="checkbox"/>	05/12/2017	05/10/2017	Pass
12	PI_MGMT_AUDIT - Plant 3 Management Audit		<input type="checkbox"/>	<input type="checkbox"/>			Pending

Easily access and track audit results.

Templates

Create, use, reuse, and modify templates and automatically load audit protocols/checklists and questions based on department, process, product line, etc.

Scheduling

Manage multiple audit schedules with due dates and assigned parties. Alert personnel of upcoming audit dates with notification emails based on configurable rules and email content. Also, automate audit refresh and recurrence to prevent any challenges in conformance and compliance programs.

Findings

Capture findings and opportunities for improvement with objective evidence—including images and video. Document follow-up activities and then assign, track, and analyze the results. Get valid issue lists and resolutions for long-term analysis and continuous improvement. Record any documentation, procedures, work instructions, blueprints, or anything else referenced during the audit.

Nonconformance and corrective action

Escalate findings about a nonconformance and initiate investigations and a corrective action. Automatically cross-reference audit results to the nonconformance/corrective action, so personnel can launch the audit and review original findings and evidence.

Examples of data visibility output

- ▶ Leverage audit intelligence and apply global searches for results in seconds
- ▶ Track and manage when internal audits are scheduled, due, and overdue
- ▶ Report on nonconformance/corrective actions by type, category, area, personnel, etc.
- ▶ Report on and analyze audit data across departments, plants, regions, and the entire organization

Nonconformance

Managing nonconforming products and dispositions

Transform the way you track failures experienced due to a process, product, or service with the Epicor AQM Nonconformance module. Whether the source is a customer complaint, an inspection, an audit, or is supplier related, the module is designed to efficiently capture, manage, and track in a closed loop.

Use the off-the-shelf workflow or define and build your own—you have the control. You and the stakeholders can have peace of mind because of seamless interoperability within AQM modules along with flexible reporting, notifications, and approval.

Key benefits

- ▶ Track all types of events and failures and excel in meeting regulatory demands
- ▶ Formalize/harmonize the approvals process from beginning to end
- ▶ Identify trends and action taken over time
- ▶ Provide engineering with a comprehensive history of events and failures by product
- ▶ Investigate failures for root cause, responsible parties, operations, and/or materials
- ▶ Track, manage, and analyze customer-returned material—including RMA, RGA, and warranty
- ▶ Associate and report costs for all types of nonconformance, dispositions, and capture verifications—by equipment, department, line, product, plant, region, or globally
- ▶ Improve response time, visibility, and customer satisfaction by transforming nonconformance management
- ▶ Analyze trends and costs by supplier, product, measuring device, employee, and more in real time

Supplier, internal, and customer nonconformance

Capture, manage, and analyze all nonconformance—whether the event, source, or cause is internal or external. Create workflows that dynamically adjust depending upon information captured.

Link to master data for suppliers, customers, or personnel responsible/involved and trigger time-sensitive stages for resolution. Generate corrective actions automatically and conduct root cause analysis based on the methodology that best suits the organization—including 8D, 5Why, etc.

Traceability, dispositions, and verifications

Manage the disposition and verification process at both the product and product characteristic levels by assigning an employee or supplier responsibility. Build defect and cause codes for analysis.

Quality alert notifications

Integrate with email to provide serial and parallel workflow approval routing. Configure notifications and escalations to suit processes. Multiple employee, customer, and supplier approvals on nonconformance, dispositions, verifications, and deviations are available.

Corrective Action

Managing corrective actions

The Epicor AQM Corrective Action module provides a closed-loop and integrated module to inform, address problems, and eradicate the potential for recurrence. Use this module to formalize your approach to documenting and addressing specific and systemic problems, and then share that learning across the organization.

Use the standard best-practice workflow or define and build your own. There is seamless interoperability with other Epicor AQM modules to provide flexible reporting, notifications, and approvals that meet the needs of all stakeholders.

Key benefits

- ▶ Provide timely issue management that meets or exceeds regulatory and customer demands
- ▶ Replace “fire-fighting” with root-cause and long-term solutions through a central knowledge base
- ▶ Capture and control both internal and external failure quality costs
- ▶ Define corrective and preventive actions—including responsibilities, notifications, and escalations—plus record the impact to people, processes, and products

Customer, supplier, and internal corrective action requests

Link and track all products and processes affected by a corrective action. Verify all actions for containment and long-term effectiveness. Cross-reference actions and issues to search for and identify potential recurrences. Record the trend, assign the task—to an employee, customer, or supplier—and document the response while tracking progress and outcome. Prevent blind spots by quickly sharing status of corrective actions to all stakeholders involved.

Approvals

Build your process your way. Allow for multiple employee, customer, and supplier approvals on corrective action requests with electronic signatures. Integrate with email clients to provide serial and parallel workflow approval routing.

Root cause

Determine and track the root cause of problems and take the necessary steps to eliminate them while using a preferred process—for example, 8D.

Specify details related to corrective actions like product, process, documentation, equipment, measuring device, training of employees, expectations and deliverables from and to customers, suppliers, etc. Then, link each corrective action request to any number of nonconformance/issues.

Examples of data visibility output:

- ▶ Analyze data and identify trends in product and process deficiencies to remain proactive
- ▶ Build “action-based” workspaces to simplify follow-up on current, overdue, and future problems as well as action items, preventive actions, etc.
- ▶ View every corrective action requested/related to a customer or supplier over time

- ▶ View due-date, delinquency, and success reporting of all corrective actions by region, plant, responsibility, and more
- ▶ Report and share corrective actions in industry-standard format—e.g., 8D, 7D, etc.

Inspection and Statistical Process Control (SPC)

Managing, receiving, first article, in process, and final inspection

With the Epicor AQM Inspection and SPC module you can plan for and record the results of product testing, to confirm product conformity and identify trends that may indicate future nonconformities. This module is critical for recording and analyzing data—from receiving, through production, to delivery—to generate adjustments and improvements at the speed of business.

Key benefits:

- ▶ Track and maintain a centralized repository of data for product testing as well as incoming, in-process, and final inspections
- ▶ Quickly analyze data from inspection results and use SPC charting to monitor process consistency
- ▶ Validate measuring device and equipment readiness
- ▶ Verify data collection against the correct revision of inspection plans and prints
- ▶ Escalate failed inspections or nonconformance to manage product disposition
- ▶ Ensure conformance with quality standards such as ISO 9001, IATF 16949, AS 9100, ISO 13485, etc.

Inspection plans

Set-up revision controlled inspection plans, and archived old plan revisions to be used later for inspection of replacement parts. Track revision levels and complete change history when characteristics are added to or removed from plans. Easily link to controlled documents for reference such as standard operating procedures.

Data collection

Generate inspection records when goods are received. Record test results against the established and controlled inspection plan.

Utilize the skip-lot function, which loads appropriate plans for an operator and then automatically promotes or demotes based on results. Integrate with automated testing equipment for quick entry of inspection results and provides variable characteristic tolerance validation capabilities.

Alert operators with a Nonconformance Warning for out-of-spec results and post a nonconformance record with a single click or tap. Maintain a centralized repository for inspection data for easy pre-shipment reviews. Implement automated email alerts and trigger notifications through established workflows.

Reporting analysis

- ▶ Generate X-Bar and R, Histogram, P, and NP Charts
- ▶ Run summarized review reports from multiple inspection points
- ▶ Generate Certificates of Conformity or Analysis

Supplier quality

Managing supplier communications and audits

Transform the way you engage, collaborate, track, and improve all supplier-related quality management activities in a secure and centralized system with Epicor AQM Supplier Quality module. Quantify supplier performance based on real-time metrics and track improvements in a system that is accessible to suppliers and internal stakeholders when it's needed.

Key benefits:

- ▶ Manage supplier information within a single “master” repository while integrating with other enterprise business applications
- ▶ Drive collaboration between stakeholders by working to the same quality plan
- ▶ Provide stakeholder visibility to supplier-related issues, quality of materials, and parts traceability
- ▶ Ensure suppliers truly understand and address all quality management requirements
- ▶ Track the status of suppliers for criticality, approvals, compliance, risk, and performance on a global scale
- ▶ Report and analyze supplier performance and share results using automatic notifications
- ▶ Notify suppliers automatically of tasks, new requirements, and specifications while also capturing acknowledgement and objective evidence

Risk and compliance

Track supplier compliance, conformance, and corrective action history. Prioritize assessments of high-value, critical, or at-risk suppliers and assess suppliers consistently with an automated and risk-based schedule. Provide suppliers the tools to self-assess for compliance while capturing evidence of conformance. Equip suppliers with simple and easy to use tools for addressing corrective actions and locating

policies, procedures, and specifications. Configure automatic notifications and acknowledgements for updated documentation and other requirements.

Performance and scorecards

Track supplier metrics—including on time delivery (OTD), inspections, nonconformance, audit performance, and more—while automatically notifying suppliers with alerts and tasks. Record, track, and recover supplier costs relating to defective materials and/or parts. Analyze supplier issues and corrective actions supporting informed decisions when awarding contracts. Generate quick and accurate summaries/history of quality issues, their resolution, and verification of effectiveness.

Quality planning

Automate steps necessary for Advanced Product Quality Planning (APQP). Provide checklists and approval routings—as required by industry-specific quality methodologies—including Production Part Approval Process (PPAP), Initial Sample Inspection Report (ISIR), and First Article Inspection (FAI) Certificates. Provide consistency in the development and project management of New Product Introductions (NPI). Control the quality of parts through a series of highly controlled, customer product submissions.

Supplier ID *	Description	(Quality)	(Timeliness)	(Value)	(Compliance)	Risk Score	(Approval Status)
ADVMAT	Advanced Materials Corp	2 - Good	2 - 90%-97% OTD	3 - Ok Value	3 - 80% Compliance	36	AP - Approved
FERRIS	Ferris Aircraft	2 - Good	2 - 90%-97% OTD	3 - Ok Value	4 - 70% Compliance	24	AP - Approved
PENSUSA	Pens USA	1 - Great	4 - 65%-80% OTD	3 - Ok Value	4 - 70% Compliance	48	CE - Certified
SLIP-54	Steer Clear Steering Couplers	2 - Good	4 - 65%-80% OTD	2 - Good Value	2 - 90% Compliance	32	AP - Approved
SLPP-1	Apost	3 - Ok	2 - 90%-97% OTD	2 - Good Value	3 - 80% Compliance	36	CA - Conditional Approval
SLPP-10	James & Nephew	3 - Ok	2 - 90%-97% OTD	2 - Good Value	3 - 80% Compliance	36	SU - Suspended
SLPP-11	TransAutoBlok	2 - Good	1 - 97%-100% OTD	2 - Good Value	3 - 80% Compliance	36	AP - Approved
SLPP-12	Dummar Technologies	5 - Terrible	2 - 90%-97% OTD	2 - Good Value	5 - < 70% Compliance	30	SU - Suspended
SLPP-13	Terumo Casting Systems	3 - Ok	3 - 80%-90% OTD	1 - Excellent Value	3 - 80% Compliance	27	CA - Conditional Approval
SLPP-14	Vandelay Industries	5 - Terrible	3 - 80%-90% OTD	3 - Ok Value	5 - < 70% Compliance	30	DA - Disapproved

Easily track and visualize supplier metrics.

Quality planning

Managing new product launches and customer part submittals

Managing APQP projects, various Production Part Approval Process/First Article Inspection (PPAP/FAI) submission requirements, and other quality-related projects can be challenging. The Epicor AQM Quality Planning module uses a configurable template approach—making this process more efficient while providing a single source of truth. The software automates and documents the critical aspects of the new product launch process to assure engineering design information is translated effectively throughout the preproduction process. It also synchronizes all key processes and activities through the creation of templates, project plans, and checklists that manage the details.

Key benefits:

- ▶ Save time and utilize the included configurable templates for a best practices approach to managing new product introduction programs and submissions
- ▶ Maintain one library of plans and submissions for effective collaboration and control—internally and with customers and suppliers
- ▶ Promote alerts and escalations to avoid timeline slippage and improve efficiency and communication
- ▶ Ensure conformance with quality standards such as ISO 9001, IATF 16949, AS 9100, ISO 13485, and more

Templates

Outline steps and create templates to save data entry time and improve consistency for submissions and plans. Automate electronic approval routings and support organizational sign-off requirements.

Plans

Utilize included templates or build plans from scratch to manage the details of each product launch regardless of the number of steps. Define project budgets and time target details and track actuals for comparison.

Track project timelines and generate summary reports to analyze performance. Relate and connect interdependent plans to each other for easy navigation. Create checklists to ensure tasks are not missed in detailed project steps.

APQP documentation

Identify potential risks with new products or services—including severity ranking with DFMEA document authoring. Define process flows with references to critical and observable product characteristics. Record and manage integrated process FMEAs.

Create and maintain process control plans and generate characteristic checklists to help ensure a quality product. Utilize the in-application AIAG and other report formats to support industry compliance.

Submissions

Track the progress on all PPAPs and FAIs—including due dates. Manage items submitted from suppliers and to customers in a centralized database for improved communication. Collaborate with suppliers by allowing direct access to upload documents into the PPAP screen. Create customer prototype submission requirements with any number of user-defined steps. Control submission revisions automatically when not approved and link submissions to APQP Plans to close the loop.

Calibration

Managing calibration and analysis studies

The Epicor AQM Calibration module transforms the way you track and control measuring devices and test equipment into a centralized system.

Key benefits:

- ▶ Manage the calibration schedule in a central system that reminds users when action is due for internally or externally calibrated equipment
- ▶ Provide a history of where a device was used and what products/processes it was used to certify utilizing AQM Inspection/SPC module integration
- ▶ Perform statistical analysis using statistical studies and automatically calculated results
- ▶ Generate quick and accurate calibration certificates and histories
- ▶ Track the cost of maintaining the calibrated device library

Measurement device library

Store a master list of measuring devices with associated attribute or variable characteristics. Organize and efficiently search for measurement devices in the system. Choose to manage recurring calibrations by time or units of usage, and configure automatic notifications for calibration deadlines. Control and track any calibration standards used to calibrate other measurement devices. Manage and track the device check-in and check-out process. The ability to migrate data from Excel or legacy gauge calibration systems to a centralized EQMS is also provided.

Calibration records

Document and track the date and time of the calibration, actual readings, who performed the calibration, time to calibrate, temperature, humidity, and more. Track and maintain time estimates for calibrations and intervals based on historical data allowing for next dates to be calculated. Record the standard used to calibrate, procedure used, actual and after adjustment readings, costs of labor, and repairs. Post a nonconformance record when a device fails its calibration.

R&R, linearity, bias, and stability studies

Schedule, perform, and store the following Measurement System Analysis (MSA) Studies—RR ANOVA, RR Range, RR Attribute, Stability, Bias, and Linearity. Automatically calculate the device last and next study dates based on planned interval. Generate reports for schedule planning based on month, quarter, etc.

Maintenance

Managing preventive equipment maintenance

Strengthen the management, documentation, and scheduling of all preventive and reactive equipment maintenance activities with the Epicor AQM Maintenance module. It supports global preventive maintenance systems within any manufacturing or service environment.

Key benefits:

- ▶ Improve efficiency by documenting, tracking, and scheduling preventive maintenance activities
- ▶ Enhance productivity by utilizing predictive maintenance data
- ▶ Reduce downtime by managing spare parts inventory effectively
- ▶ Track reactive work orders, solutions, and associated costs
- ▶ Analyze resources consumed per equipment unit based on historical data
- ▶ Ensure conformance with quality standards such as ISO 9001, IATF/TS 16949, AS 9100, ISO 13485, etc.

Equipment library

Build and manage equipment inventory while identifying preventive maintenance activities, status, location, and more. Track equipment purchase information—including date, supplier, manufacturer, warranty information, model/serial number, etc.

Preventive maintenance planning

Access the latest revision of maintenance procedures in the Epicor AQM Document Control module for easy reference. Define any number of maintenance activities for each piece of equipment. Track the responsible employee or supplier and define how often preventive maintenance is performed.

Preventive work orders

Configure notifications related to upcoming maintenance and equipment shut-down. Schedule and track all PM while recording details that include the employee or supplier performing the maintenance, due date, actual date, machine downtime, and time required to complete the maintenance. Generate last and next preventive maintenance dates based on defined intervals when preventive work orders are saved. Complete preventive work orders via PC, laptop, or tablet and deduct spare parts that get used from the spare parts inventory.

Reactive work orders

Create work orders for unscheduled maintenance. Catalog work order details such as who reported the issue, description, who is assigned to fix the issue, and a due date for completion. Complete reactive work orders via PC, laptop, or tablet. Deduct spare parts that get used from the spare parts inventory.

Spare parts inventory

Inventory all spare parts while managing inventory levels and calculating reorder points. Trigger notifications when inventory levels fall too low. Track vendors and back up vendors and pricing in one central system.

Customer management

Managing customer communications

Transform the way you serve, satisfy, and interact with your customers with the Epicor AQM Customer Management module. Manage every quality-related customer interaction with a streamlined, configurable process that is designed to efficiently capture, manage, and track outcomes in a closed loop.

Use the standard best-practice workflow or define and build your own. You have total control and peace of mind of seamless interoperability with other AQM modules. Flexible reporting, notifications, and approvals help meet the needs of all stakeholders.

Key benefits:

- ▶ Capture, manage, and analyze all complaints—whether the event, source, or cause is internal or external
- ▶ Formalize/harmonize the process and approvals from beginning to end
- ▶ Identify issue trends and action taken over time to appropriately allocate resources
- ▶ Provide all departments with a comprehensive history of complaints and resolution by product
- ▶ Improve visibility, response time, and customer satisfaction by transforming complaint management across departments
- ▶ Investigate failures by root cause, responsible parties, operations, and/or materials
- ▶ Track, manage, and analyze customer returns like RMA, RGA, and warranty
- ▶ Associate and report costs for all types of issue management while capturing verifications
- ▶ Analyze complaint trends and costs by supplier, product, plant, employee, region, etc. in real time
- ▶ Track and report events/complaints by any data type/category

Customer, contacts, and workflow

The Epicor AQM Customer Management module links to master data for suppliers, customers and personnel responsible, or involved workflow in order to trigger time-sensitive stages for resolution. Create workflows that dynamically adjust and route issues depending upon communication or complaint type.

Generate nonconformance and—where required—corrective actions automatically and conduct root-cause analysis based on the methodology that best suits the organization—including 8D, 5Why, etc.



Get a complete insight of your customer quality metrics—including complaints.

Product management

Managing blueprints and specifications

The Epicor AQM Product Management module is critical for managing product quality with engineering revision control, change approvals, characteristic definitions, approved suppliers, and linkage to controlled documents. This module serves as the hub for all product quality data and is referenced by most modules in the AQM integrated software system.

Key benefits:

- ▶ Integration with Epicor ERP for a seamless data flow to eliminate redundancy and inaccuracies and improve visibility
- ▶ Effectively manage product-specific documentation requirements and changes to product requirements through Engineering Change Orders (ECOs)
- ▶ Define Advanced Product Quality Planning (APQP) documents—including DFMEA, Process Flow, PFMEA, and Process Control Plans to support all three phases of evaluating design process elements shifting to a proactive state

- ▶ Enable engineering, manufacturing, and quality departments to work with and maintain one system
- ▶ Ensure compliance with quality standards ISO 9001, IATF 16949, AS 9100, ISO 13485, etc.

Product change requests

Track the employee, customer, or supplier making the request and all details of the suggested change—including request date and response due date. Communicate change requests easily with notifications and alerts. Automate electronic signatures on approval and auto archive revision history.

Product characteristics

Create an unlimited number of product and process specifications to be controlled in order to meet design intent. Automatically download product characteristics from drawings in your CAD system.

APQP documentation

Identify potential risks with new products or services—including severity ranking with DFMEA document authoring. Define process flows with references to critical and observable product characteristics. Record and manage integrated process FMEAs.

Create and maintain process control plans and generate characteristic checklists to help ensure a quality product. Utilize the in-application AIAG and other report formats to support industry compliance.

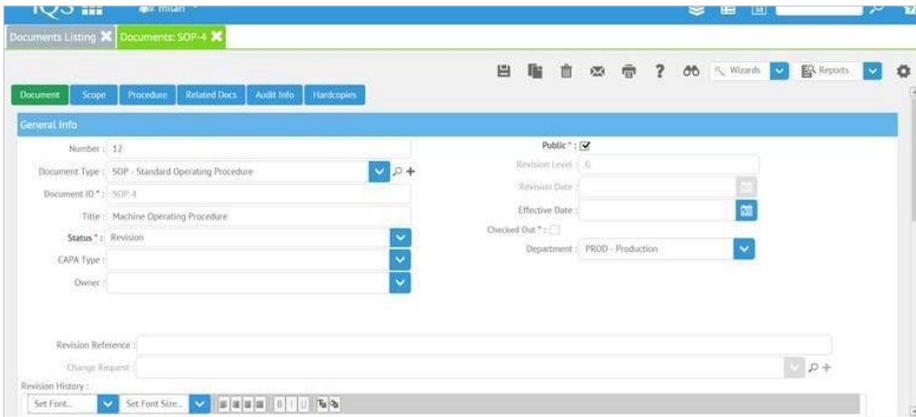
Document control

Managing work instructions and procedures

Formalize how documents and other artifacts are stored, controlled, distributed, published, and audited with the Epicor AQM Document Control module. Provide secure, fast, and efficient documentation access to all stakeholders—locally or globally—with minimum administrative overhead and maximum control.

Key benefits:

- ▶ Ensure all documents in use are the latest revisions and all obsolete documents are removed from circulation
- ▶ Ensure conformance with standards such as ISO 9001, IATF/TS 16949, AS 9100, ISO 13485, etc.
- ▶ Associate with and publish documents to any part of the organization's hierarchy
- ▶ Track ownership, approvals, and distribution for document revisions



Manage and maintain all relevant documentation by tracking ownership, approvals, and distribution for document revisions.

- ▶ Trigger training notifications and retrain impacted personnel with document changes
- ▶ Tie documents to training and competence to confirm employee knowledge
- ▶ Archive document revisions—including all related tables and documentation
- ▶ Search globally for rapid retrieval

Document repository

- ▶ Manage and store an unlimited master list of documents—including policies, procedures, work instructions, forms, guidelines, reference materials, and specifications—along with complete revision histories
- ▶ Maintain document teams with developed-by, approved-by, and distributed-to lists.
- ▶ Schedule audits to be performed on documentation
- ▶ Escalate document audit findings to nonconformance and corrective actions

Change requests

Track the employee, customer, or supplier making the change request, as well as the details of the suggested change. Automatically derive approval lists. Integrate with email client to provide serial and parallel workflow approval routing and maintain a full audit trail.

Document viewer

Find, select, and read documents in seconds from a controlled global library with a touch-enabled, cross platform interface. Provide a training needs analysis listing. Retrieve all documentation filtered by individual approver.

Training

Managing training, skills, and jobs

Transform your approach to training and competence management to support quality as an organization-wide responsibility with the Epicor AQM Training module. Built-in integration with the Epicor AQM Document Control module helps eliminate blind spots and automates acknowledgment and control.

Key benefits:

- ▶ Track training records, employee skills, job descriptions, and surveys throughout the enterprise
- ▶ Manage proposed changes to training courses, job descriptions, and skills with full change request functionality
- ▶ Track and test employee understanding of new/revised documents, policy awareness, and individual certifications
- ▶ Acknowledge changes to processes, operations, and safety
- ▶ Ensure compliance with quality standards such as ISO 9001, IATF/TS 16949, AS 9100, and ISO 13485

Job description requirements

Generate employee training needs analysis (TNA) when documents, skills, and/or job descriptions are revised. Define skill and competency for all positions. Manage revision levels and change history as job requirements evolve and change over time.

Skills library

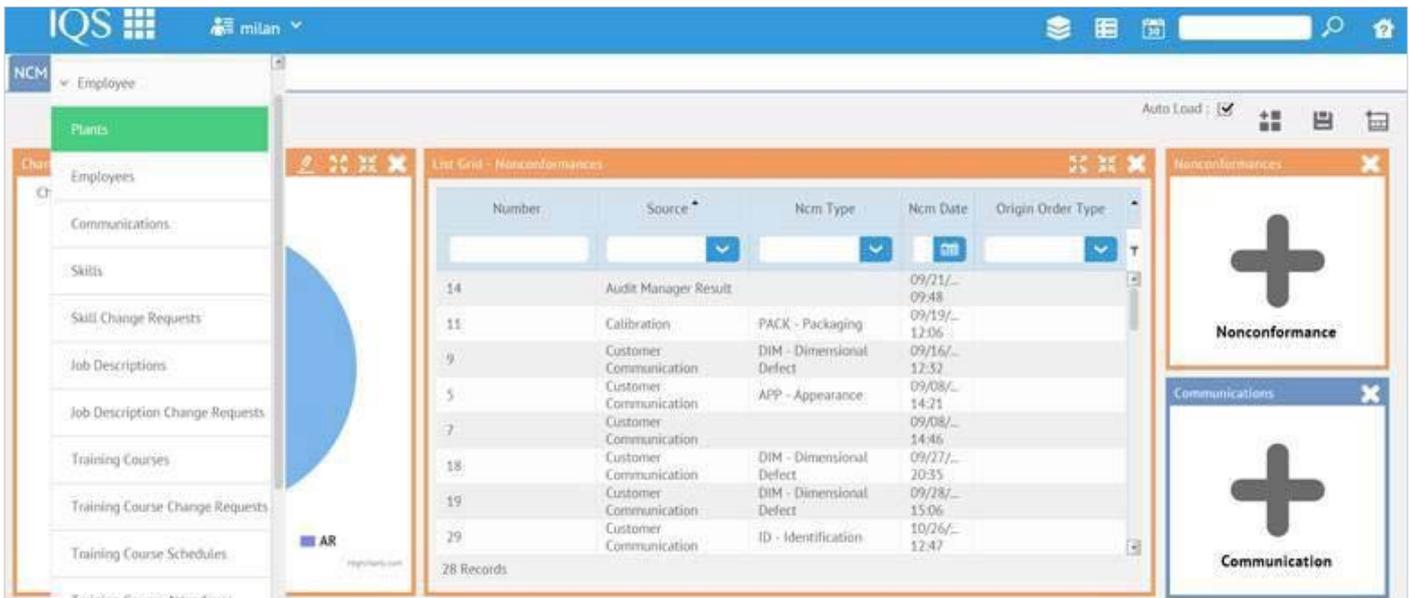
Maintain inventory employee skills with change history tracking and revision control. Define updates and refresher dates needed to meet continuing and additional training and education requirements. Assign skill and competency to training courses and automatically attribute to employees upon successful completion.

Link to Document Management

Inventory and manage all coursework and on-the-job training documentation in the Document Management module.

Skills and training matrix

Generate training needs analysis by job and location.



Use dashboards to track employee training records, skills, and more.

Training courses

Schedule training courses, register employees, and document attendance. Document and automatically attribute the skills received upon successful course completion. Manage training course revision levels when courses and skills are updated.

Employee skills testing

Create assessments based on job position and department. Utilize multiple formats—including a simple-read document quiz or a full test with any number of questions and passing grade. Randomize the order of questions and offer alternate questions to eliminate memorization. Update documents and skills tables automatically when a test is passed.

Examples of data visibility output:

- ▶ Upcoming training courses with required documents and skills
- ▶ Job description and training needs/gap analysis
- ▶ Employee job and skills history

Risk management

Managing and mitigating risk

The Epicor AQM Risk Management module takes a high-level, abstract approach to recording risk management efforts. This module focuses on business risk as opposed to specific product or process risk, which is managed through FMEAs in the AQM Product Management module. Once risks are identified and recorded, they can then be reviewed and prioritized by management and controls can be established. All management reviews can be recorded in review meetings to track management involvement in the process.

Key benefits:

- ▶ Provides a logical context through which to explain the organizational approach for risk management to auditors
- ▶ Maintains a secure and centralized repository for global risk assessment results
- ▶ Allows for flexible prioritization techniques to promote efficiency, safety, and quality
- ▶ Ensures conformance with quality standards such as ISO 9001, IATF 16949, AS 9100, ISO 13485, etc.

Assessments

Assign owners to various aspects of the business to be assessed for risk. Record assessments of risk, and assign consistent priority logic across the board. Feed assessments into a risk register to assemble a quick view of the highest priority risks.

Mitigation

Record plans to mitigate risks using controls based on the results of assessments. Assign and track responsibility and target dates for control implementation. Keep and maintain a centralized log of potential future controls.

Review meetings

Establish and track management team involvement pertaining to organizational risk—including risk assessments and progress of mitigation plans to provide evidence of who met, what was reviewed, and meeting action items.

Epicor Advanced Quality Management

System interoperability

Epicor AQM Risk Management can be linked to any module that contains evidence of risks, mitigation actions, and more and can be used as a standalone solution.

Examples include:

- ▶ A training course resulting from a risk assessment
- ▶ A supplier risk assessment for additional details on risk
- ▶ A nonconformance as evidence of occurrence and impact of a risk

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