



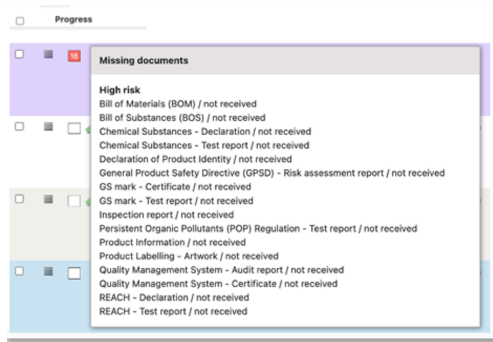
# Document Risk

Quick Guide

## Table of Contents

1	Introduction to Document Risks .....	3
2	How does it work .....	4
2.1	How to set it up .....	5

# 1 Introduction to Document Risks



On the Technical Files page, you will find a status block that indicates how many documents are still missing in the file.

The block's colour indicates the risk of missing documents, with red indicating high risk, orange indicating medium risk, and green indicating a low risk.

By placing the mouse pointer over the block, an overview of all missing documents appears, grouped by risk level.

By default, the risk level is classified as high for all documents.

You can change this to medium or low at your discretion for specific documents, possibly only for specific projects, file groups, product risk levels, and product categories.

The principle is that all documents should be there. This is why ProductIP sets Document Risk to 'high' by default.

One can differentiate between the documents:

1. should actually be there for production
2. should be there for shipping
3. Should be agreed upon, if not there now, for the next order

## Function/ Purpose:

This will provide an overview of compliance status and enable a quicker decision-making opportunity.

## When to use:

It helps to create a quick overview of the risk of missing documents

## Benefit:

In a quick overview, one can see which documents are missing and decide on this basis. The set colour is not visible to the supplier.

## 2 How does it work

You can find these options on your technical file page.

- 13 documents are missing, at least 1 of which is high risk
- 5 missing documents, medium or low risk, at least 1 with a medium risk
- 3 documents are missing, all with a low risk
- All documents have been collected
- No regions or product category have been chosen yet
- 20 documents are missing, but the file deadline is more than 6 weeks in the future (the 6 weeks mentioned will be a customizable account setting)
- No regions or product category have been chosen yet, but the file deadline is more than 6 weeks in the future
- The file has not yet been activated

One can only set the colours red, orange, and green; ProductIP defines the other colours and is not customizable.

We have chosen to show five weeks before the deadline of the file the colour of the compliance risk of the file so you can see the file's status and the risk of the missing documents. This will help prioritize the missing documents and chase at least the red and or orange ones.

In the account, the admin (or user with admin rights) can add a colour (risk) to a document category

You could use the Requirement category (A1 to B3) as a tool to determine which colour the document has.

<u>Document Risk</u>		<u>Requirement category</u>
High = Red	should actually be there for production	A1 and B1
Medium = Orange	should be there for shipping	B2
Low = Green	Should be agreed upon, if not there now, for the next order	B3

You can find the Requirement category on the Requirement tab in the technical file.

The actual use case of document risk depends on your internal processes and what you intend to achieve.

Some examples:

A.

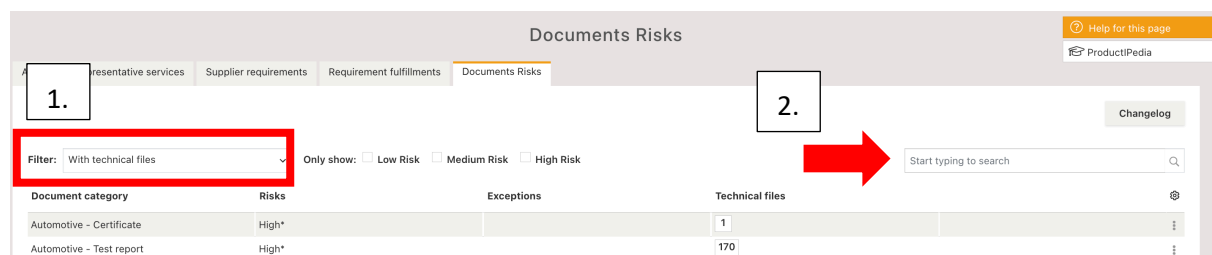
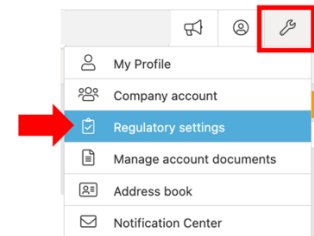
- Technical files with high (= red) document risk can only be ordered, including CEO permission
- Technical files with medium (=orange) document risk can only be ordered by responsibility and signature of a e.g. team leader
- Technical files with low (=green) document risk can be produced and shipped without additional permission

B.

- Technical files with red status can be escalated to the management
- Technical files with orange status can be escalated to the buying department

## 2.1 How to set it up

1. Go to the control panel
2. Chose Regulatory settings
3. Open Document Risk



The \* added to "High" means default risk, not explicitly confirmed by someone in your company

1. It is possible to filter by only the document categories in your current technical files.'
2. Find the document category for which you want to set the risk.

Document category	Risks	Exceptions	Technical files
Automotive - Certificate	High*		1

- Click on the row of the document you want to confirm or adjust.

[Back to overview](#)

## Product Labelling - Artwork

Default risk

High \*

[Change default](#)

[Confirm high as default risk](#)

Exceptions

List the conditions under which the risk for the document category differs from the default, below

[Add product risk level](#)

[Add file group](#)

[Add product category](#)

[Add project](#)

≡ Risk

Condition

You could adjust only the 'Medium' and 'Low'. Or you could also confirm the 'High' risk documents so that it is clear that all documents have been assessed, and there is no doubt about the status.