Intelex Technologies

Problem Case Management System 2.0

Nexteer Employee

Contents

Logging into Intelex

To start working with the Intelex site and the Problem Case Management 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 **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, and it will prompt you to enter your user name.
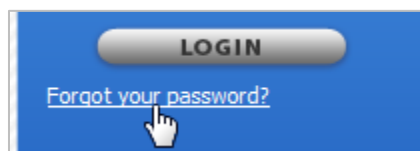
2. Enter your User Name in the space provided and select the **Send My Information** button to have an email sent to you with your login credentials.

General Navigation

There are a few areas within the system that you should be aware of in order to navigate yourself 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 select the name hyperlink, this will appear as a dropdown. Open the dropdown to display the location structure for Nexteer. When a Nexteer employee initiates a Problem Case, the location selected in the dropdown here will determine where the record will be routed to. All records are stored within one of these locations.
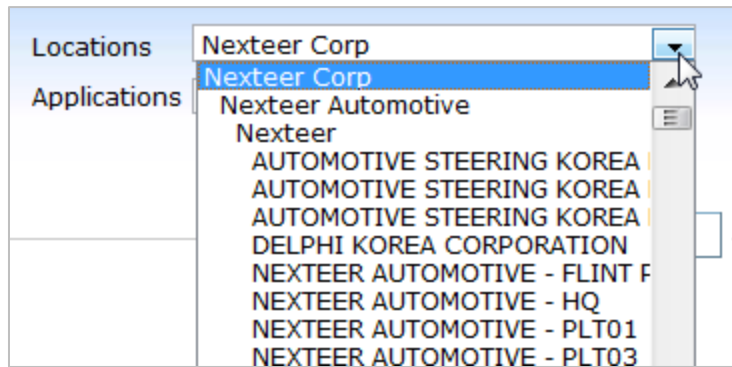
Applications Dropdown

Beneath the location dropdown you will find the Applications dropdown. This will display all Intelex Application you have access to in the system. Use this to select and navigate to the **Problem Case Management** application.

Toolbar

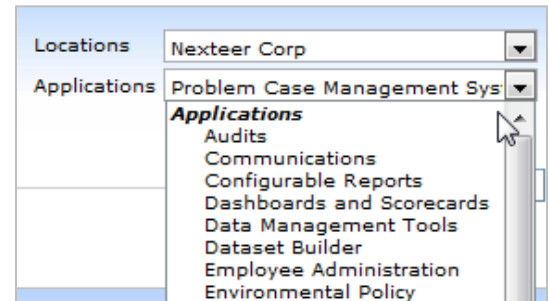In the center of the page, as part of the header, you will see a toolbar. This toolbar displays icons that are quick links, which will allow you to navigate from page to page within the system. Since it is on the header of the page it will display regardless of the area in the system you are working 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 the first page that will be loaded when you log in to Intelex. 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.

My Tasks Summary : My Tasks

My Tasks | My Staff's Tasks | All Tasks | My Training | My Staff's Training | My Email | More ▾

My Tasks   Custom Inventory: ...

List All | Reassign Employees | Advanced Search

|	Location	Description	Type	Stage	Person Responsible	Due Date ▾	Overdue/Upcoming
☐	Nexteer Corp	147	Problem Case Form	Final Approval	Intelex Support	01/02/2013 00:00:00	Upcoming
☐	Nexteer Corp	122	Problem Case Form	Final Approval	Intelex Support	12/29/2012 00:00:00	Upcoming
☐	Nexteer Corp	631092749	Problem Case Form	Final Approval	Intelex Support	12/26/2012 00:00:00	Upcoming
☐	Nexteer Corp	141	Problem Case Form	Initial Approval	Intelex Support	12/19/2012 00:00:00	Upcoming
☐	Nexteer Corp	136	Problem Case Form	Initial Approval	Intelex Support	12/18/2012 00:00:00	Upcoming
☐	Nexteer Corp	130	Problem Case Form	Initial Approval	Intelex Support	12/15/2012 00:00:00	Upcoming
☐	Nexteer Corp	114	Problem Case Form	Initial Approval	Intelex Support	12/15/2012 00:00:00	Upcoming
☐	Nexteer Corp	107	Problem Case Form	Initial Approval	Intelex Support	12/14/2012 00:00:00	Upcoming
☐	Nexteer Corp	dsaf	Problem Case Form	Initial Approval	Intelex Support	12/13/2012 00:00:00	Upcoming
☐	Nexteer Corp	ILx	Problem Case Form	Initial Approval	Intelex Support	12/13/2012 00:00:00	Upcoming
☐	Nexteer Corp	ILX	Problem Case Form	Initial Approval	Intelex Support	12/13/2012 00:00:00	Upcoming
☐	AUTOMOTIVE STEERING KOREA LTD	631092749	Problem Case Form	Initial Approval	Intelex Support	12/12/2012 00:00:00	Upcoming

Problem Case Management System (PCMS 2.0)

Stages	Due Date	Person Responsible	Tasks
Draft - Complaint Info		Complaint Issuer	Submit to Supplier, Cancel
Supplier Acknowledge (No Response)	+3	Supplier Owner	Acknowledge, Cancel
Initial Response	+2	Supplier Owner	Submit Response, Cancel
Initial Response Review	+2	PC Submitter	Approve, More Info, Cancel
Initial Response Rejected	+1	Supplier Owner	Re-submit, Cancel
PC Disputed	+3	PC Submitter	Dispute Accepted, Dispute Rejected Cancel
5Y SQE Assignment	+1	Plt Region SQ Mgr	Assignment Complete, Cancel
Root Cause/Corrective Action Plan	+15	Supplier Owner	Submit, Cancel
CAP Review		IAStage Owner	Approve, More Info, Cancel
CAP Review (Supplier Region)	+2	Supp Region SQE	Approve, More Info, Cancel
CAP Review (Plant Region)	+3	Plt Region SQE	Approve, More Info, Cancel
CAP Review Hold (skip if WFCC is approved)	+2	CAPAppOwn	Approve, More Info, Cancel
CAP Rejected		Supplier Owner	Re-submit, Cancel
CAP Rejected (Supplier Region)	Original Root Cause Due Date	Supplier Owner	Re-submit, Cancel
CAP Rejected (Plant Region)	+2	Supp Region SQE	Re-approve, Reject back to Supplier, Cancel
Implementation	Set in Root Cause	Supplier Owner	Submit, Cancel
Implementation Review		Complaint Issuer	Approve, Validation Required, More Info, Cancel
Implementation Review (Supplier)	+5	Supp Region SQE	Approve, More Info, Cancel
Implementation Review (Plant)	+3	Plt Region SQE	Approve, More Info, Cancel
Implementation Review Hold	+2	Plt Region SQE	Approve, Validation Required, More Info, Cancel
Implementation Rejected		Supplier Owner	Re-submit, Cancel
Implementation Rejected (Supplier)	Original Implementation	Supplier Owner	Re-submit, Cancel
Implementation Rejected (Plant)	+2	Supp Region SQE	Re-approve, Reject back to Supplier, Cancel
Validation	+30	Supplier Owner	Submit, Cancel
Validation Review	+3	Plt Region SQE	Approve, More Info, Cancel
Validation Review Hold	+2	Plt Region SQE	Approve, More Info, Cancel
Validation Rejected	Original Validation	Supplier Owner	Re-submit, Cancel
Nexteer Owned Tier 3 Confirmation		ESQMgr	Confirmed, Not Confirmed, Cancel
Cancel Case Justification	+1	CC Requester	Submit Request, Cancel Request
Cancel Case Review	+1	Plt Region SQ Mgr	Accept Request, More Info, Reject Request

Submit Problem Case

As a Nexteer employee, it is your responsibility to track and submit any quality or compliance issues with a supplier. In order to submit a problem case in the Intelex system, navigate to **Problem Case Management** within the **Applications** dropdown in the upper right corner. Once this application page loads, follow the steps below to successfully submit a new problem case record:
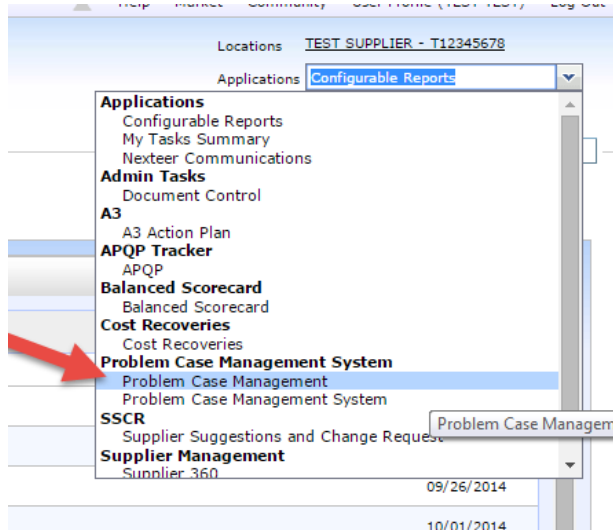
1. Start by selecting the **Create PC** tab on the left. This will take you to a new blank Problem Case:
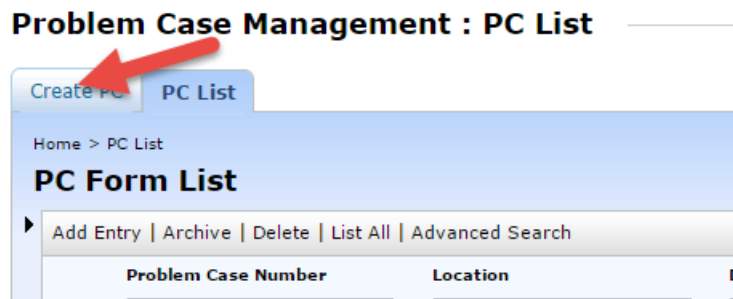
2. Enter in all the fields listed in the **Problem Case Header-Contact Information** section. Any field with an asterisk is a mandatory field and must be filled in before saving the record. Some fields will automatically be populated once the record has been saved. If it is not an **Additional Incident** skip to **step 3**.

Additional Incident

a. Check the box in the **Problem Case Header-Contact Information** section marked **Additional Incident**.

b. A new field will open requiring **Originating Problem Case** number.

c. Click the **Select** link next to the box and a list of all Open problem cases for that supplier location will be displayed to select from.

d. Click the box on the left of the **Originating Problem Case** you want to select. Then click the **Select** button at the bottom. Note, if you click on the link of the Problem case number, you will be taken to a new window to view the problem case in full detail.

3. After completing the **Problem Case Header-Contact Information** section click on the **Save** button in the menu bar.

4. Now all the fields in the **Complaint Information** section will be available to fill out. Reminder: fields with asterisks indicate that the field is required to be filled out before you can save the form.

5. Once filled out, click **Save** in the menu bar and review the **Complaint Information** section.
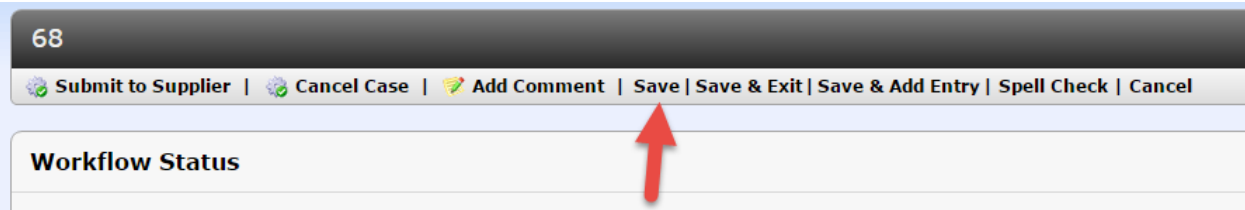
6. If you need to attach documents/pictures you can do so at this point. If unsure on how to attach documents, please see the guide on our learning center.
http://www.nexteer.com/supplier-applications-learning-center/general-navigation/attaching-documents/

7. If case is ready to **Submit to Supplier**, click the button in the menu bar. Note: once submitted it cannot be retrieved to edit the information. It will move onto the next step in the process. If you do not click **Submit to Supplier** the supplier will not be able to respond to the issue.
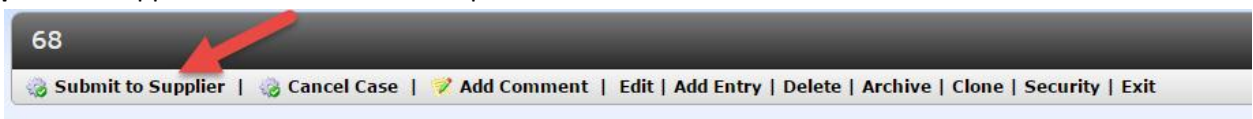
8. The supplier must now submit an initial response to the Problem Case.

Supplier Quality Manager: Assigning SQEs

Now that the problem case has been submitted, the Regional Supply Quality Manager will be notified by email, or in their **My Tasks Summary** page, that they have to assign an SQE to the problem case if it is not a Nexteer to Nexteer, Shipping or Prototype problem case. To assign an SQE follow these steps:

1. After opening up the task from your email or your **My Tasks Summary** page of Intelex, click the **Edit** button in the menu bar and scroll down to **Supplier Quality Responsible Parties** section**.**

2. Once the page loads, assign the **Supplier Region SQE** and **Plant Region SQE** by selecting their name in the dropdown. Note: The Supplier Region SQE and Plant Region SQE cannot be the same person. Also, you need to check the box that indicates the **Nexteer Look Across Requirements.** This will send a notification to the Regional Supplier Quality Manager(s) in the locations selected providing them the information of this quality concern. Your location must be selected at a minimum.

3. After assigning the SQEs and indicating the **Nexteer Look Across Requirements** click the **Save** button in the menu bar and then review to make sure you have the proper people assigned.

4. When you are ready to complete this task, click on the **Information Updated** button in the menu bar. This will assign the responsibilities of this problem case to the selected persons when it is time for them to complete their activity and send them the early notifications of the issuance of this Problem Case.

Supplier Dispute Review

During the **Supplier Initial Response** stage, the supplier has an opportunity to dispute the problem case details. If disputed, the record will be sent back for review of the supplier Dispute Reason and comments. A determination to either Accept or Not Accept the Dispute will be available. If the problem case has been disputed, you will receive a formal email notification as well as a task on your **My Tasks Summary** page. To complete this task, follow the steps below:

1. Open the record from the email link or from your **My Tasks Summary** list. To view the reason this problem case has been disputed, scroll to the **Supplier Initial Response (Containment)** section on the page. From here you will see the selected reason in the **Dispute Reason** field, as well as any additional **Dispute Comments** the supplier entered.

2. At this point you have two options:
    a. **Approve** the dispute by clicking the **Dispute Accepted** button in the menu bar.
        i. The case will be closed in a disputed status. After clicking this button the case will not be reported.
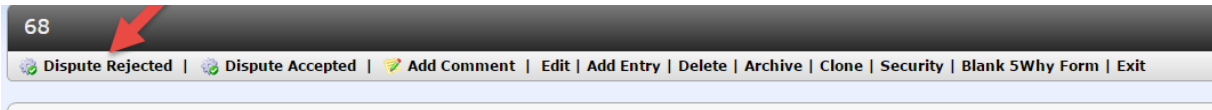
    b. **Decline** the Dispute:
        i. In order to Decline the Dispute first click **Edit** button in the menu bar.
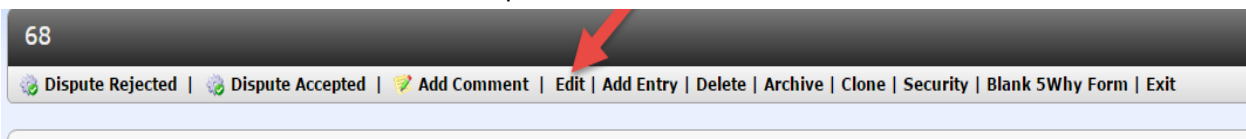
        ii. Scroll down to **Supplier Initial Response (Containment)** section and in the field **Reason(s) for Rejecting this Dispute** put the reasons for rejecting the dispute.

iii. Then click the **Save** button at the top in the menu bar

iv. Review the document to make sure the information filled out is correct
v. Now click the **Dispute Not Accepted** button in the menu bar. This will send the Problem Case back to the supplier.

3. Once you have completed one of the above options, your task is complete and will be removed from your **My Tasks Summary** page.

Initial Response Review

Once the supplier submits the Initial Response for the problem case, you will be responsible to complete the initial approval task. You will receive an email notification as well as an action item on your **My Tasks Summary** page. Follow the steps below to complete the approval task:

1. The Problem Case now includes a new section: **Supplier Initial Response (Containment).** Review the information contained in this section.

2. Once the information has been reviewed you may add a comment within the **Initial Response Approval** section. Note: If Requesting More Information from the supplier, a comment is required to be entered. To do this, click the **Edit** button in the menu bar, enter comments into the field **Initial Approval/Rejection Comments**. Then click the **Save** button from the menu bar.

3. Once you have saved and reviewed the data entered by the supplier, you have three options:
   a. **Accept Response:** Click the **Approve** button from the menu bar if you are satisfied with the supplier response. This sends the record back to the supplier for the **Final Response – Root Cause/Corrective Action Plan.**
   b. **Cancel**: Click the **Cancel Case** button from the menu bar to go into **Cancellation Workflow**.

c. **Reject Response**: Click the **Request More Information** button from the menu bar if you are not satisfied with the supplier initial response, then click **OK** in the confirmation box This sends the record back to the **Supplier Initial Response (Containment)** stage.
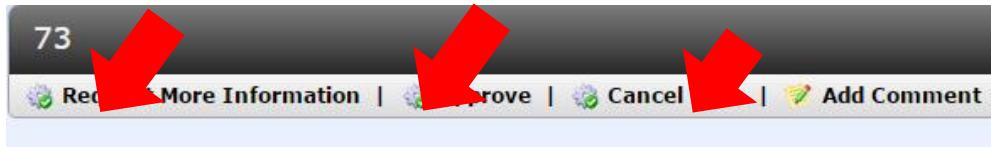
4. Once you have completed one of the above options, your task is complete and it will be removed from your My Tasks Summary page.

Root Cause/Corrective Action Plan Review (Nexteer to Nexteer, Supplier Region SQE)

Once the supplier has completed their investigation of the problem case, you will receive another task to approve the Root Cause/Corrective Action Plan. You will be notified by email as well as receiving an action item on your **My Tasks Summary** page. Open the task either from the link within the email or from your task list and follow the steps below to complete it:

1. The Problem Case now includes a new section: **Root Cause/Corrective Action Plan.** The answers provided in this section are equivalent to a supplier's 5Why document. Within this area you will see four subsections. **How the Problem Occurred:**

Why the Problem was not Detected:

What is the Systemic Root Cause?

What is the Systemic Root Cause?

Systemic Problem Description	Describe the systemic failure(s).
Summarize the root cause of the systemic failure	This should be was was determined through the completion of the Systemic leg of the 5Why form
Systemic Final Permanent Corrective Action	
Systemic Final Permanent Corrective Action Target Date	Wednesday, August 19, 2015
Systemic Root Cause	

Lessons Learned and Look Across Requirements:

Lessons Learned and Look Across Requirements

Lessons Learned	
Look Across Requirements	
The 3L5Y with photos is attached to this Problem Case	Check box to confirm that a 5Why form has been attached to this Problem Case
Supplier Reported Total Quantity Non-Conformance	
Root Cause/Corrective Action Plan Complete	Yes

2. After reviewing this information, you can add a comment into the **Root Cause/Corrective Action Plan Approval** section in the **Supplier Region SQE Review Corrective Action Plan Approval/Rejection Comments**.
3. To populate this section click on the **Edit** button in the menu bar and scroll down to this section to edit.
4. You must confirm if the 3L5Y is attached by selecting yes or no in the **Is the 3L5Y with photos attached to this Problem Case?** field.

Root Cause/Corrective Action Plan Approval

Supplier Region SQE Approval

Supplier Region SQE Review Corrective Action Plan Approval/ Rejection Comments	
Final Quantity Non-Conformance	**Spill** Check the box if there is a Spill at Nexteer or OEM Customer
***Is the 3L5Y with photos attached to this Problem Case?**	

5. After this section is filled out, you can **Save** and then review to make sure that all the information filled out is correct.

6. After saving, you have three options:

   a. **Reject Root Cause/Corrective Action Plan:** If unsatisfied with the **Root Cause/Corrective Action Plan** you can reject it by clicking the **Request More Information** button in the menu bar. This will send the form back to the Supplier for them to correct their response

   b. **Approve Root Cause/Corrective Action Plan:** If satisfied with the **Root Cause/Corrective Action Plan** you can accept it by clicking the **Approve** button in the menu bar. This will send the problem case down two paths:

      i. If the case is Nexteer to Nexteer, Shipping, or Prototype, it will go onto the **Implementation Plan**

      ii. If the case is not Nexteer to Nexteer, Shipping, or Prototype, then it goes to the Nexteer Plant Region SQE

   c. **Cancel Case:** This will cause the problem case to go into **Cancellation Workflow.**
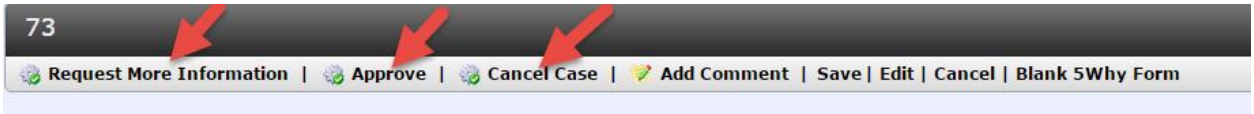
Root Cause/Corrective Action Plan Review (Nexteer Issuing Plant Region SQE)

Once the supplier has completed their investigation of the problem case, you will receive another task to approve the Root Cause/Corrective Action Plan. You will be notified by email as well as receive an action item on your **My Tasks Summary** page. Open the task either from the link within the email or from your task list and follow the steps below to complete it:

1. The Problem Case now includes a new section: **Root Cause/Corrective Action Plan.** The answers provided in this section are equivalent to a supplier's 5Why document. Within this area you will see four subsections.
   How the Problem Occurred:

   Why the Problem was not Detected:

Why the Problem was not Detected

Detection Problem Description	Describe the detection system failure, including location and/or operation(s).
Summarize the root cause of the detection failure	This should be what was determined through the completion of the Detection leg of the 5Why form
Detection Final Permanent Corrective Action	
Detection Final Permanent Corrective Action Target Date	Wednesday, August 19, 2015

What is the Systemic Root Cause?

What is the Systemic Root Cause?

Systemic Problem Description	Describe the systemic failure(s).
Summarize the root cause of the systemic failure	This should be was was determined through the completion of the Systemic leg of the 5Why form
Systemic Final Permanent Corrective Action	
Systemic Final Permanent Corrective Action Target Date	Wednesday, August 19, 2015
Systemic Root Cause	

Lessons Learned and Look Across Requirements:

Lessons Learned and Look Across Requirements

Lessons Learned	
Look Across Requirements	
The 3L5Y with photos is attached to this Problem Case	Check box to confirm that a 5Why form has been attached to this Problem Case
Supplier Reported Total Quantity Non-Conformance	
Root Cause/Corrective Action Plan Complete	Yes

2. After reviewing this information, you can add a comment into the **Root Cause/Corrective Action Plan Approval** section in the **Plant Region SQE Review Corrective Action Plan Approval/Rejection Comments**.
3. To populate this section click on the **Edit** button in the menu bar and scroll down to this section to edit.
4. You must confirm if the 3L5Y is attached by selecting yes or no in the **Is the 3L5Y with photos attached to this Problem Case?** Field. You will also need to complete the **Final Quantity Non-Conformance** and **Worldwide Formal Customer Complaint** fields.

5. After this section is filled out, you can **Save** and review to make sure that all the information filled out is correct.

6. After saving, you have three options:

   a. **Reject Root Cause/Corrective Action Plan:** If unsatisfied with the **Root Cause/Corrective Action Plan** you can reject it by clicking the **Request More Information** button in the menu bar. This will send the form back to the Supplier Location SQE to determine next steps for the problem case**.**

   b. **Approve Root Cause/Corrective Action Plan:** If satisfied with the **Root Cause/Corrective Action Plan** you can accept it by clicking the **Approve** button in the menu bar.
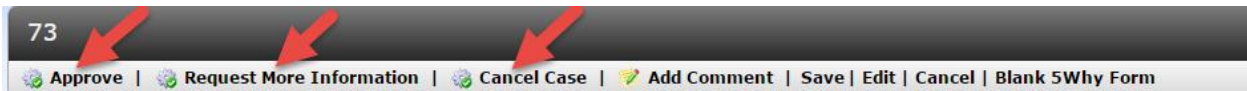
   c. **Cancel Case:** This will cause the problem case to go into the **Cancellation Workflow.**
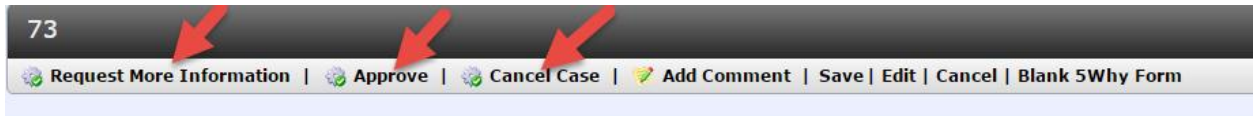
Root Cause/Corrective Action Plan Approval Hold

If the problem case is not Nexteer to Nexteer, Shipping, or Prototype, and World Wide Formal Customer Complaint (WFCC) is checked but not reviewed, it will go into this hold stage. Once entering this stage an email goes to the problem case originator informing them that they have 2 days to provide any objections via email to the Nexteer Issuing Plant SQE.

Once 2 days has passed then the Nexteer Issuing Plant SQE has three options:

1. **Approve:** If you are satisfied, you can approve the case **Root Cause/Corrective Action Plan Approval** as an approval on behalf of the plant by selecting the **Approve** button in the menu bar this will send the problem case into the implementation phase.

2. **Reject:** If an objection was raised by the plant, you can reject the **Root Cause/Corrective Action Plan Approval** by selecting the **Request More Information** button in the menu bar. This will then send it back to the Supplier Region SQE who then can reject it to the supplier.

3. **Cancel**: This will cause the problem case to go into the **Cancellation Workflow**

![INTELEX logo]

Implementation Review (Supplier Region SQE)

Once the supplier has completed their **Implementation Plan**, you will receive an email letting you know that your next task in Intelex is to review the **Implementation Plan**. Or you will see it as a task in your **My Tasks Summary** page in Intelex. To review the **Implementation Plan** and complete your task follow these steps:

1. Scroll down to the new section of the problem case, **Implementation Plan**.

2. After reviewing the **Implementation Plan** you can add comments in the **Implementation Approval** section under the field **Implementation Rejection Comments**. To edit this field click the **Edit** button in the menu bar and then the field will be able to populate. Note: To **Request More Information** from the supplier, comments must be entered.

3. After entering the information you want, click the **Save** button in the menu bar and then review the document to make sure that everything is correct.

4. After reviewing, you have three options:
   a. **Approve**: if you are satisfied with the **Implementation Plan** then you can **Approve** the problem case. The problem case will go to the Issuing Plant Region SQE for review if it is not a Nexteer to Nexteer, Shipping, or Prototype case, otherwise it will be closed.
   b. **Reject**: If you are unsatisfied with **Implementation Plan,** you can reject it by clicking the **Request More Information** button in the menu bar. This will send the form back to the Supplier for them to correct their response.
   c. **Cancel Case**: This will cause the problem case to go into the **Cancellation Workflow.**

Implementation Review (Issuing Plant Region SQE)

Once the supplier has completed their **Implementation Plan**, you will receive an email letting you know that your next task in Intelex is to review the **Implementation Plan**. Or you will see it as a task in your **My Tasks Summary** page in Intelex. To review the **Implementation Plan** and complete your task follow these steps:

1. Scroll down to the new section of the problem case, **Implementation Plan**.

Implementation Details

Implementation Details	

△ **Were the following updated for this issue:**

Control Plan			
Process Flow Chart		Work or Job Instructions	
Setup Instructions and/or Operation Checklists		Training Material	
Have you submitted your PPAP documents for approval?			

2. After reviewing the **Implementation Plan** you can add comments in the **Implementation Approval** section under the field **Implementation Rejection Comments**. To edit this field click the **Edit** button in the menu bar and then the field will be able to populate. Note: To **Request More Information** from the supplier, comments must be entered.

Implementation Approval

△ **Implementation Approval**

Implementation Rejection Comments			
Supplier Validation Due Date		Spill	
Shortage			

3. After entering the information you want, click the **Save** button in the menu bar and then review the document to make sure that everything is correct.
4. After reviewing, you have three options:
   a. **Approve**: if you are satisfied with the **Implementation Plan** and don't think it needs **Validation,** then you can **Approve** the problem case and then the problem case will be put on a 2 day hold for the plant to provide any objections to the closure of the problem case.
   b. **Reject**: If you are unsatisfied with **Implementation Plan,** you can reject it by clicking the **Request More Information** button in the menu bar. This will send the problem case back to the Supplier Region SQE to determine the next steps for the problem case.
   c. **Cancel Case**: If you want to cancel the case, then you can put the problem case into the **Cancellation Workflow** by clicking the **Cancel Case** button in the menu bar

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🔄 Request More Information	🔄 Validation Required	🔄 Cancel Case	🔄 Approve	✏️ Add

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Implementation Hold

If the problem case is not Nexteer to Nexteer, Shipping, or Prototype, then it will go into this Implementation Hold stage. Once entering this stage an email goes to the problem case originator informing them that they have 2 days to provide any objections via email to the Nexteer Issuing Plant SQE.


Once 2 days has passed and there are no objections then the Nexteer Issuing Plant SQE has four options:

a. **Approve**: if you are satisfied with the **Implementation Plan** and don't think it needs **Validation,** then you can **Approve** and close the problem case.

b. **Request for Validation**: If you are satisfied with the **Implementation Plan,** but feel that it needs **Validation,** then you can click the **Validation Required** button and this will send the problem case to the supplier for Validation.

c. **Reject**: If an objection was raised by the plant, you can reject the **Implementation Plan** by selective the **Request More Information** button in the menu bar. This will send the case back to the Supplier Region SQE who can then reject it back to the supplier.

d. **Cancel Case**: This will cause the problem case to go into the **Cancellation Workflow**

Validation Review

Once the supplier has filled out the **Validation Details** and submitted it, you will be notified by email of completion or you can view it in your **My Tasks Summary** page of Intelex. To review the **Validation**, follow these steps:

1. Scroll down to the new section **Validation Details** to review the field **Supplier Validation Details**.
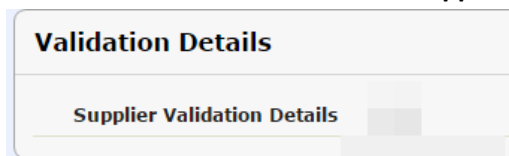
2. After reviewing you now can edit the section, **Validation Approval,** by clicking the **Edit** button in the menu bar, and then scrolling to this section.
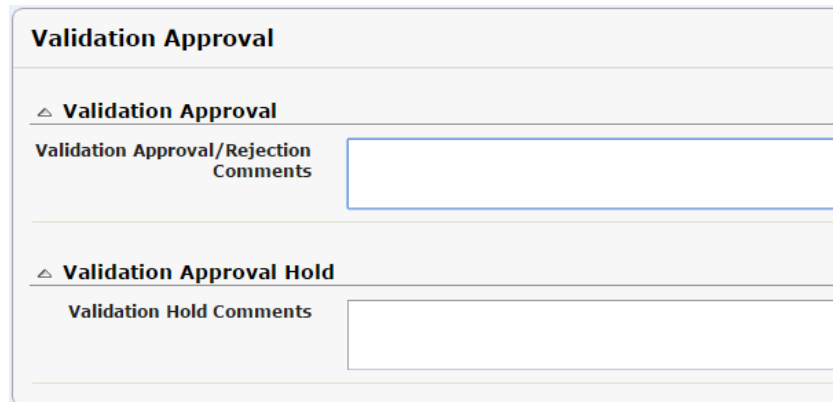
3. After populating the fields **Validation Approval/Rejection Comments**, save the changes to the problem case by clicking the **Save** button in the menu bar. Then review the **Validation** and the **Validation Approval** sections.
4. After reviewing you have three options to choose from:
   a. **Approve the Validation**: If you are satisfied with the supplier's **Validation Details,** then you can approve it by clicking the **Approve** button in the menu bar.
   b. **Reject the Validation**: If you are unsatisfied with the supplier's **Validation Details,** you can reject it by clicking the **Request More Information** button in the menu bar..
   c. **Cancel Case**: This will cause the problem case to go into the **Cancellation Workflow**

Validation Hold

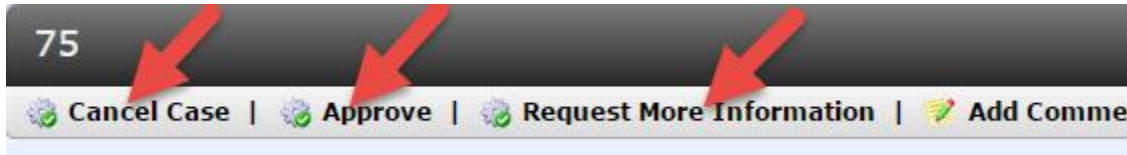If the problem case is not Nexteer to Nexteer, Shipping, or Prototype, it will go into this hold stage. Once entering this stage an email goes to the problem case originator informing them that they have 2 days to provide any objections via email to the Nexteer Issuing Plant SQE.

Once 2 days has passed the Nexteer Issuing Plant SQE has three options:

   a. **Approve:** If you are satisfied with the **Validation**, then you can approve the **Validation** by clicking on the **Approve** button in the menu bar..
   b. **Reject:** If an objection was raised by the plant, you can reject the **Validation** by following these steps.
      1. Click the **Edit** button in the menu bar.
      2. Scroll down to the section **Validation Approval**, and in the field **Validation Approval Hold Comments**, put in the reasons for sending the **Validation** back to the supplier.
      3. Click the **Save** button in the menu bar and review the information you put in the section **Validation Approval.**
      4. After reviewing is complete, click the **Request More Information** button in the menu bar.
   c. **Cancel:** This will cause the problem case to go into the **Cancellation Workflow**.

Problem Case Cancellation Process

Submitting a Problem Case for Cancellation

To cancel a problem case, an authorized Nexteer user will see the **Cancel Case** button on all the stages of the problem case (regardless if it is a Nexteer owned stage or a supplier owned stage). They may choose to cancel the problem case at any time until the problem case is closed.

When the **Cancel Case** button is clicked on, the problem case will go into a cancellation approval workflow process, unless it is in Draft. If it is in the Draft stage and the Cancel Case button is click and confirmed, it will cancel the problem case directly without any approval.

Note: Once you enter the cancellation workflow the only way to exit it is through the approver, so if you mistakenly requested it, you will still have to submit it for approval and at that point the Approver will need to Reject the request.

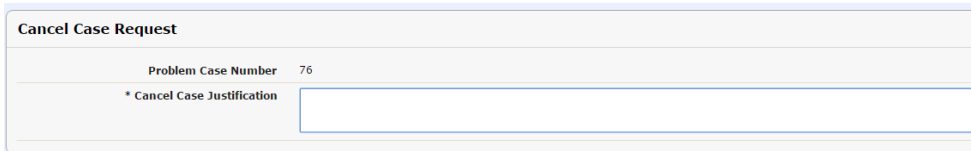To Cancel a problem case you must do the following:
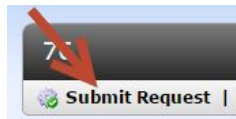
1. Click on the **Cancel Case** button.

2. Confirm that you want to cancel the problem case and enter in a cancellation reason.
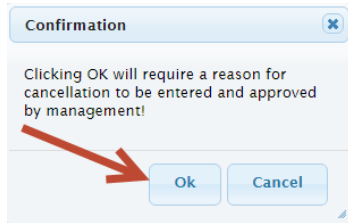
3. Click the **Edit** button and enter in your cancellation reason in the Justification field.

4. Click the **Save** button and review your entry.
5. Click the **Submit Request** button.

   The Problem case has now been submitted to either the Nexteer To Nexteer Problem Case Cancellation Reviewer, if it is a Nexteer to Nexteer Issued Problem Case, or to the Issuing Plant GSM Supplier Quality Manager, if it is an external supplier.

Reviewing a Problem Case Cancellation Request

Once a Nexteer user has submitted a cancellation request, you will receive an email letting you know that your next task in Intelex is to review this request. You can also see it as a task in your **My Tasks Summary** page in Intelex. To review the request**,** follow these steps:

1. Review the cancellation justification in the Cancel Case Request detail section. Once done reviewing the details you have 3 options:
   a. You may elect to **Accept** the cancellation request.
      i. If you would like to add comments to the Problem Case before you accept the request, click on the **Edit** button and enter in your comments in the available field and save the form.
      ii. When ready click the **Accept Request** button.
      iii. At the prompt to confirm cancellation, click the **Ok** button.

      *At this point the Problem Case is **Cancelled** and no further actions can be performed.*

   b. If you do not agree with the reason for cancellation you may **Reject** the request.
      i. To reject the request you must first **Edit** the record and enter in your rejection reason and save the form. Note, this reason this is just for tracking purposes only and **will not show to the user** except on reports.
      ii. Click the **Reject Request** button.

      At this point the Problem Case will go back to the original stage that the Problem Case was in before the cancellation request.

   c. If you are unsure if the Problem Case should be cancelled or it is not clear as to the reason, you may **Request More Information** from the requesting user.
      i. To request more information from the person requesting cancellation, you must first **Edit** the record and enter in why you need more information in the available field and save the form.
      ii. When ready click the **Request More Information** button.

      This will go back to the cancellation requestor to provide more information and resubmit.