

1 Introduction

1.1 Document Purpose and Scope

The purpose of this document is to provide details that describe the business process of reviewing Best Known Methods (BKMs) that have been submitted to the appropriate Best Known Methods Review board. This process begins after a new or updated BKM has been submitted to the BKM Review Board by an area supervisor (new BKMs) or by a BKM owner (updated BKMs), and the BKM Review Board has been notified that they have a BKM to review.

2 Review BKM Use-Case Workflow

Each Engineering department has at least one permanent BKM Review Board that owns the department policy that governs the BKM. As the number of BKMs increases, there may be a need to create more Review Boards to ensure that the appropriate experts are reviewing the BKMs. In this case, each Engineering department may create as many distinct Review Boards that are required to review the body of BKMs that exist.

The Engineering department will designate the BKM Review Board owner who will be responsible for determining the personnel who will comprise the Review Board in its department. BKM Review Boards always include a BKM Review Board owner, and they may include other area managers and technical experts in the subject matter for the body of BKMs that the board is responsible for. BKM owners may also attend BKM Review Board meetings that are held or provide feedback on BKMs that they own or to provide feedback when BKMs are being merged, but they are not required to provide approval nor are they permanent members of the Review Board.

2.1 Retrieve List of BKMs for Review

All new BKMs and all updated BKMs that have been designated by the area supervisor as needing the BKM Review Board approval will be reviewed by the BKM Review Board. The review process for a new and an updated BKM will be the same.

After a BKM has been initially reviewed and approved by the area supervisors and then submitted to the BKM Review board, they retrieve the list of the BKMs that are ready for their review. The BKM Review Board may only need a notification that they have a BKM or more than one BKM to review.

It is not a requirement that a BKM Review Board conduct a physical meeting to review each BKM that requires approval. A BKM Review Board member may simply review and then approve or reject new or updated BKMs that have been submitted to them. However, the system must provide the ability to approve the BKMs without actually meeting. The BKM Review board may need to collaborate and may conduct a meeting for the review, but the system does not need to capture the minutes of the meeting. The system need only to record that the BKM was approved.

2.2 Review BKM Information

The purpose of the BKM review board is to review BKMs that have been submitted to them by area supervisors. The review consists of the following tasks.

2.2.1 *Validate Correct Review Board Assigned*

The Review Board first validates that the list contains only those BKMs that fall within their department.

Note: See the Alternate Workflow for Reassigning BKMs that have been submitted to the wrong BKM Review Board.

2.2.2 *Verify Validity of BKM Content*

Based on the knowledge and expertise of the Review Board, they verify that the BKM meets the criteria for BKM submission:

- No BKM exists for an existing process that is being performed internally, and a need exists for that process to be formalized and standardized
- No BKM exists, and the cost of repeatedly performing a process incorrectly is more than the cost of creating the BKM
- No BKM exists, and the cost of repeatedly performing a process inefficiently is more than the cost of creating the BKM
- Creating a BKM augments the process of training and disseminating knowledge to other engineering groups (MLC or quad pitch)
- New processes are developed that need to be formalized and standardized
- Preventive action is needed to avoid and then prevent the pitfalls of a problem
- Corrective action is needed to avoid and then prevent the pitfalls of a problem

2.2.3 *Assign Review Schedule*

Each Review Board designates the review schedule for each BKM that it is responsible for and for the body of BKMs that it is responsible for. Options for review schedules include one year, two year, or no year. Review schedules may be triggered by particular events that may include, but are not limited to, the following:

- PLM DP/Phase schedules
- Checklist instantiations
- Last review date too far gone
- Ad-hoc requirements (emergency review required)

In addition to the designated review schedule for a particular BKM, the Review Board sets a review schedule for reviewing the body of BKMs that they are responsible. For example, this review might be set for once every 3 years.

2.2.4 *Verify No Duplication or Redundancy of BKMs*

Because the BKM Review Board has the most knowledge regarding the entire BKM knowledgebase and those BKMs that exist within their area of expertise, they are the ones most qualified to verify that no duplication exists between BKMs.

If similar examples of a BKM are submitted to the BKM Review Board, the Review Board can recommend how to merge the BKMs. Then the Review Board can create a new BKM and send the multiple versions of the BKMs back to a single BKM owner that they designate. That single BKM owner will be responsible for making the appropriate changes to merge the duplicated BKMs and then resubmit the single updated BKM for review.

2.2.5 Verify/Reassign BKM Owner

The BKM Review Board determines whether the current BKM owner is valid or whether a new one needs to be assigned. If a new BKM owner needs to be assigned or additional owners need to be added, the BKM Review Board can perform this action during the review process.

2.2.6 Verify/Reassign BKM Subject Matter Expert

The BKM Review Board determines whether the current SME(s) is valid or whether new SMEs to be assigned or added. If a new BKM SME needs to be assigned or additional SMEs need to be added, the BKM Review Board can perform this action during the review process.

2.3 Approve BKM

After reviewing the content of the BKM, the BKM Review Board records that the BKM is valid and that no redundancies exist.

All members of the Review Board must approve the BKM.

2.4 Update Version of BKM

The versioning process is a way to record major or minor changes that have been made to a BKM. All BKMs that are reviewed by the BKM will become a new version after the BKM approves the BKM (major revision).

A special version notation may be needed to mark that a BKM has been combined with another BKM so that when a merged BKM is submitted to the BKM Review Board for review, the Review Board knows that this BKM includes information from several BKM versions.

2.5 Publish BKM

After approving the BKM, the Review Board publishes the BKM by making the BKM available to users who have the access.

2.6 Send Notification of BKM Review Board Decisions

After publishing the BKMs, the Review Board notifies users of the decisions made by the review board.

3 Review BKM Use-Case Alternative Workflow

3.1 Invalidate BKM

This alternative workflow occurs after a BKM Review Board has reviewed the content of the BKM and has determined that the content is invalid for whatever reason.

3.1.1 Record Requested Changes

After the BKM Review Board reviews the content of the BKM to verify its validity or to verify that no duplication exists, the Review Board can invalidate the BKM. The BKM Review Board records the requested changes. If the BKM is invalid because it is redundant and needs to be merged with another BKM, then that information needs to be recorded.

3.1.2 *Reject BKM*

After recording the requested changes if necessary, the Review Board will mark the BKM as rejected. If duplicate or redundant BKMs are being rejected, then the Review Board may be rejecting more than one BKM at a time. If the Review Board is rejecting redundant BKMs, then there needs to be a way to distinguish which BKM should be the "master" BKM in which the other rejected BKMs will be merged into.

3.1.3 *Send BKM to BKM Owner*

After the BKM Review Board records the requested changes, it sends the BKM back to the BKM owner who will be responsible for making the requested changes and then resubmitting the BKM for re-review.

3.2 Reassign BKM Review Board

This alternative workflow occurs after list of BKMs to review has been retrieved, and the Review Board determines that one or more BKMs have been submitted to the wrong Review Board.

3.2.1 *Select Correct Review Board*

After the BKM is submitted to the Review Board, the Review Board can reassign the BKM Review Board if the wrong Review Board was selected.

3.2.2 *Send BKM to Correct Review Board*

After the BKM Review Board selects the correct Review Board, it sends the BKM to the correct Review Board.

3.2.3 *Send Notification of BKM Review Board Change to BKM Owner*

The BKM Review board sends a notification to the BKM owner that the Review Board was changed.

3.3 Archive BKM

This alternative workflow occurs after a BKM Review Board has reviewed the content of the BKM and has determined that the BKM needs to be archived. A BKM will be archived when the BKM is no longer being used by Product Engineers.

3.3.1 *Change Status of BKM to Archive*

After determining that the BKM needs to be archived, change the status of the BKM to Archive. The process of archiving a BKM involves removing or deleting a BKM from the system. The BKM data still needs to be accessible for viewing.

3.3.2 *Update Version of BKM*

After the BKM has been archived, the version needs to be updated.

4 Risks

<Link to a Risk List or list risks here individually>

5 Improvement Possibilities

6 Process Owner

- BKM Review Board Member

7 Special Requirements

7.1 Security

7.1.1 BKM Review Board Members

BKM Review Board members include managers from a particular area/department and subject matter experts for a particular body of BKMs. BKM Review Board members have the following abilities:

- Assigning adherence guidelines
- Modifying adherence guidelines
- Assigning review schedule
- Modifying review schedule
- Assigning BKM owners
- Modifying BKM owners
- Approving BKMs
- Rejecting BKMs
- Publishing BKMs
- Notifying users of BKM decisions

7.1.2 BKM Review Board Owner

Each BKM Review Board has an owner who has the following abilities:

- Assigning members to his or her area BKM Review Board
- Changing the members of his or her area BKM Review Board
- Designating the BKM Review Board approval/sign-off requirements for a particular BKM, which may include:
 - Number of people required to sign-off on a BKM
 - Role, such as technical expert or BKM owner, required for sign-off on a BKM
- Assigning adherence guidelines
- Modifying adherence guidelines
- Assigning review schedule
- Modifying review schedule
- Assigning BKM owners
- Modifying BKM owners
- Approving BKMs
- Approving BKMs in the absence of a member who is required to sign-off on a BKM

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- Rejecting BKMs
- Publishing BKMs
- Notifying users of BKM decisions