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1.0 PURPOSE:

The purpose of this procedure is to define the process for providing training for QMS procedures or forms and their associated EPDS workflows to Project Delivery team members.

2.0 RESPONSIBILITIES:

- 2.1 Assistant Program Manager – The Assistant Program Manager shall be responsible for updates to this procedure, ensuring compliance to this procedure and for reporting nonconformance to Project Delivery Management.
- 2.2 PMO Quality Manager – The PMO Quality Manager shall be responsible for reviewing and approving the classification of major or minor revision to QMS documents, thus establishing the training requirements.
- 2.3 PMO Document Control Manager – The PMO Document Control Manager shall be responsible for review and approval of QMS document revisions in accordance with QM-12 and shall be responsible to publish training expectations for minor QMS document revisions. The PMO Document Control Manager shall also be responsible to verify the existence of a completed training record with evidence of training for all responsible parties for major or new QMS document changes.
- 2.4 PMO Business Process Owners – All PMO Business Process Owners shall be responsible for classifying revisions to their QMS documents as major, minor, or administrative, and shall determine if any corresponding changes to EPDS workflows are necessary in accordance with this procedure, and shall be responsible for providing training to all responsible parties for major revisions and for all new QMS documents and associated EPDS workflows prior to release. The PMO Business Process Owners shall also be responsible for providing records of this training to the PMO Document Control Manager with the document change package prior to release of new or major revisions to QMS documents.
- 2.5 EPDS Manager – The EPDS Manager shall be responsible to work with the Business Process Owner to understand, schedule and implement changes to EPDS workflows as a result of changes to QMS procedures or forms. Support Process Owner in providing training revised for or new EPDS workflows.
- 2.6 Responsible Parties – All roles listed within the Responsibilities section of any given QMS document shall be responsible to attend mandatory training sessions conducted by the PMO Business Process Owner for any major revisions or new QMS documents. Exceptions to this requirement are the DPD and AED, who while perhaps having a final approval responsibility, are not considered mandatory attendees to training.

3.0 SCOPE/APPLICABILITY:

This procedure shall apply to all QMS procedures and forms and their associated EPDS workflows that undergo revision or original release within the Project Delivery QMS system.

4.0 REFERENCES:

N/A

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5.0 DEFINITIONS & ACRONYMS

6.0 PROCEDURES:

6.1 Classification of revisions

6.1.1 In accordance with QM-12, PMO Business Process Owners are responsible for revisions to their own QMS documents as well as any new QMS documents within their business function. By virtue of this procedure, PMO Business Process Owners are also responsible for revisions to or new EPDS workflows which support those QMS procedures. Upon completion of revisions to QMS procedures or forms and the corresponding EPDS workflow, the PMO Business Process Owner or assigned author of the document shall classify the revision as a major, minor or administrative revision according to table below:

6.1.1.1 Major Revision – A major revision shall be classified as one that adds or changes responsibilities in addition to changes in text and/or process steps, for forms this will be equivalent to the addition or deletion of a signature authority. Consideration shall be given to the impact of this change to the corresponding EPDS workflow.

6.1.1.2 Minor Revision – A minor revision shall be classified as one that involves a change in process steps, or even the addition of process steps, but does not add or change responsibilities. Consideration shall be given to the impact of this change to the corresponding EPDS workflow. It is possible that minor revisions to a QMS procedure involving the resequencing of process steps may result in a major change to an EPDS workflow and thus invoke the training requirement.

6.1.1.3 Administrative – A revision that only adds, removes, or updates hyperlinks; updates formatting for clarification or fixes misspelled words/acronyms.

6.1.2 The PMO Quality Manager shall have the authority to change the classification of a revision upon review of the revised documents. If this occurs, the PMO Quality Manager shall communicate this with the PMO Business Process Owner and they shall develop a solution.

6.1.3 Fulfillment of Training for Minor Revisions

6.1.3.1 To QMS Procedures and Forms

6.1.3.1.1 Upon the release by Document Control of a revision to a QMS document that has been classified as a minor revision, there will be no formal training session, but rather the Document Control Manager shall publish a communication to the Project Delivery team with the following message:

6.1.3.1.2 “The following QMS documents have undergone minor revisions. If your role requires your involvement in the execution of these procedures or forms, it is now your responsibility to retrieve the latest version from the QMS published on www.ntta.org and familiarize yourself with the changes. If upon review you determine you require further clarification or training, it is your responsibility to contact the PMO Business Process Owner for same.”

6.1.3.2 To EPDS Workflows

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- 6.1.3.2.1 Upon release by the EPDS Manager of a revision to an EPDS workflow that has been classified as a minor revision, there will be no formal training session, but rather the EPDS Manager shall publish a communication within EPDS to the Project Delivery team a message describing the minor changes that have been made to the associated EPDS workflows with instruction that questions should be directed to the PMO Business Process Owner.
- 6.1.4 Fulfillment of Training for Major Revisions and New Releases
 - 6.1.4.1 For QMS Procedures or forms
 - 6.1.4.1.1 Prior to release by Document Control of a major revision to a QMS procedure or form or the release of a new QMS procedure or form, the PMO Business Process Owner shall hold a formal training session during which they shall cover the content of the major revision, or they shall cover in its entirety a new QMS document.
 - 6.1.4.1.2 While other Project Delivery team members may be invited to this training session, the mandatory attendees are those persons whose role is defined within the Responsibilities section of the procedure. i.e. training is mandatory for those roles who have a responsibility defined in the execution of the procedure. The noted exception to this are the roles of DPD and AED, if their role in the procedure is review and approval only, then they will not be required attendees at the training session.
 - 6.1.4.1.3 For QMS forms, the mandatory attendees of training to a major change to a form will be those with signature authority on the form itself.
 - 6.1.4.1.4 The PMO Business Process Owner shall have the freedom to determine the format and venue for the training session, but must accommodate all mandatory attendees. The training shall cover the changes to a procedure in a major revision and must cover the entire procedure for a new release.
 - 6.1.4.1.5 If during the training session, points of clarification arise, the Business Process Owner shall address those issues within the procedure before its submittal to Document Control.
 - 6.1.4.1.6 All those in attendance shall sign a training roster as a record of training, the training roster (QM-05-F1) shall be part of the document change package and archived with that record.
 - 6.1.4.1.7 Document Control shall not process a document change package for a new or major revision without a completed training roster with evidence of attendance for all roles defined within the Responsibilities section of the procedure.
 - 6.1.4.1.8 If the procedure does not have an associated EPDS workflow, then at this point training is complete and the new or revised QMS procedure or form may be processed for release.
 - 6.1.4.2 For corresponding EPDS Workflows – When the QMS Procedure has a corresponding EPDS workflow, the following steps shall also be completed prior to release of the new or revised QMS procedure or form.

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- 6.1.4.2.1 When the Process Owner proposes a change to a QMS document, they shall consider whether or not this change will result in a necessary change to a corresponding EPDS workflow. An indication of this assessment shall be documented within the document change package.
- 6.1.4.2.2 If the determination is "Yes", that the change does require a corresponding change to EPDS workflows, then the Process Owner shall coordinate this change with the EPDS Manager including:
 - 6.1.4.2.2.1 Work with the EPDS Manager to ensure the EPDS team has a full understanding of the change to be made
 - 6.1.4.2.2.2 Working with the EPDS Manager to establish a schedule for implementation and user acceptance testing of the change to EPDS
 - 6.1.4.2.2.3 It is highly preferred for QMS changes and EPDS changes to be coordinated together, if this is not possible, then the Process Owner shall establish a communication plan to communicate the disconnect between the QMS and EPDS changes and a process to mitigate.
- 6.1.4.2.3 Once the EPDS change has been made, tested and released, the Process Owner shall prepare the following materials for training:
 - 6.1.4.2.3.1 EPDS Process Reference Card
 - 6.1.4.2.3.2 EPDS process training presentation including procedure overview, flowchart of EPDS process (Reference Card), technical and EPDS points of contact
 - 6.1.4.2.3.3 Practical hands on exercises in the EPDS test development site
 - 6.1.4.2.3.4 Survey for evaluation of training
- 6.1.4.2.4 Training shall be conducted, lead by the Process Owner and supported by the EPDS Manager, while others may be invited to the training session; the mandatory attendees shall be all those persons who perform in the Roles as identified on the EPDS Process Reference Card.
- 6.1.4.3 All attendees shall sign the Training Roster (QM-05-F1), which shall be provided by the PMO Business Process Owner as part of the document change package.
- 6.1.5 When the QMS procedure or form has a corresponding EPDS workflow, it is permissible and recommended to train on both the QMS procedure and the EPDS workflow at the same time.
- 6.1.6 Once training roster has been attached to Document Change Package, then document change shall be processed in accordance with QM-12.

7.0 REGULATORY REQUIREMENTS:

N/A

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8.0 RELATED BOARD POLICY:

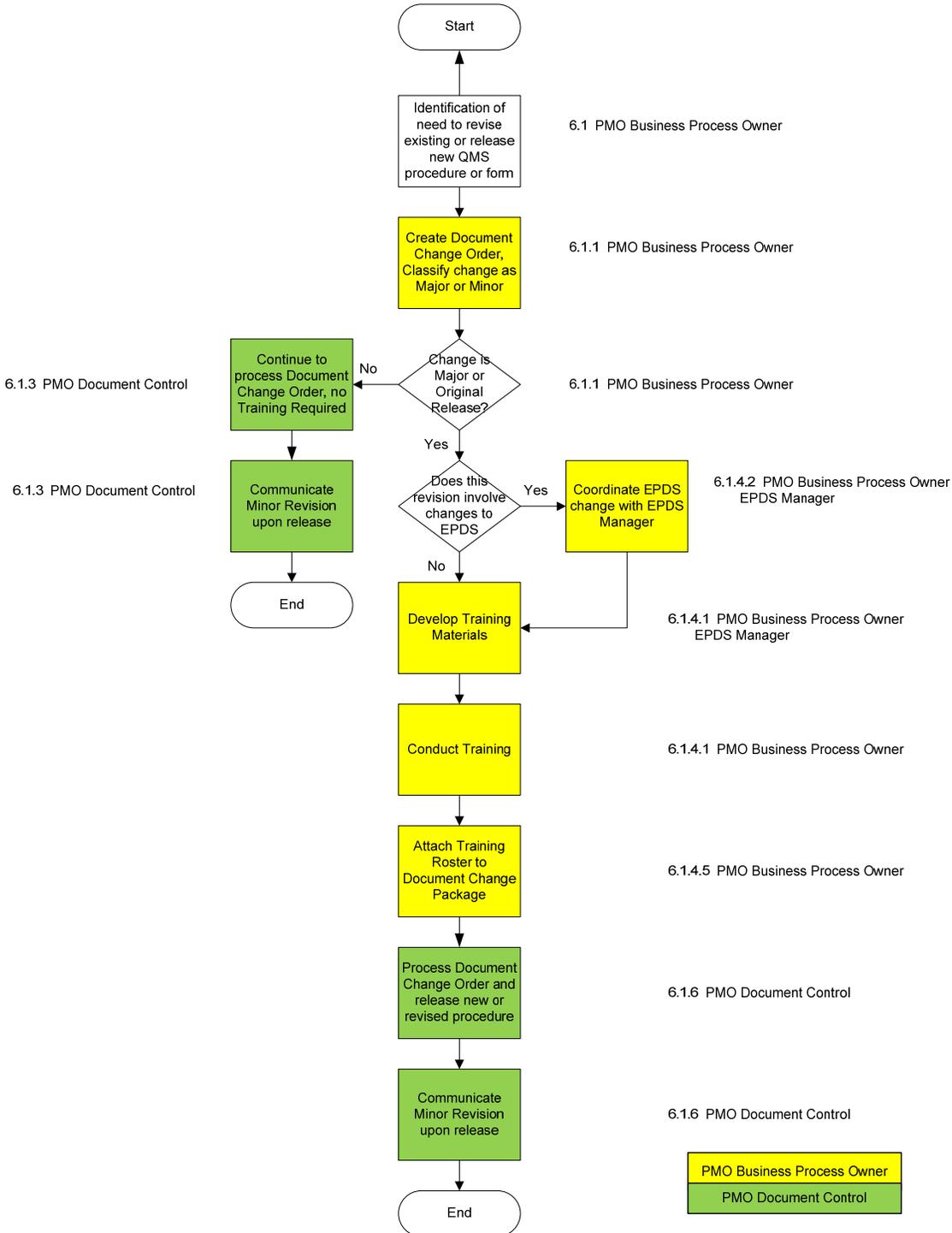
N/A

9.0 COMPONENT DOCUMENTS:

- [QM-05-A1](#) Sample EPDS/Procedure Training Presentation
- [QM-05-A2](#) EPDS Process Reference Card Sample
- [QM-05-A3](#) PMO Business Process Training Requirements Checklist
- [QM-05-F1](#) Training Roster

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10.0 FLOWCHART:



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11.0 REVISION HISTORY:

Revision	Revised by:	Date Issued	DRN	Reason for Revision
0	Micki Ellis	05/14/2010	10145	Original Release
1	Md Omar Faruk	07/23/2010	10217	Revised to delete IT-01 Information Technology Solutions Development Process from 4.0 References, 6.0 Procedures and 10.0 Flowchart, delete IT-01-F12 Training Roster from 6.0 Procedures and 9.0 Component documents, add QM-05-F1 Training Roster to 6.0 Procedures and 9.0 Component Documents.