



Trace

Corporations, Clusters and Projects

Applicable for Sharpen360 Trace version 6.0.3

Revision 3

02-04-2025



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1 Overview and Introduction

Thank you for using our Process Assessment Tool, Sharpen360 *Trace*.

This document describes the configuration options of *Trace*. We try to use precise naming of concepts in *Trace*. Please see chapter **Error! Reference source not found.** for our list of Terms and Concepts.

If you have questions, have ideas that you would like to discuss, or just need an introduction to specific parts of *Trace*, please contact us!

Also, we would very much appreciate if you would report any bug or inconvenience you might find. Please use the email below, and add screenshots and descriptions as needed and we will immediately prioritize this.

Use support@sharpen360.com as much as you like. You are welcome!

The Sharpen360 Team.

*PS: Please help us by sharing knowledge about *Trace* to your colleagues, network, family, friends, neighbors, mother, or anybody else interested 😊*



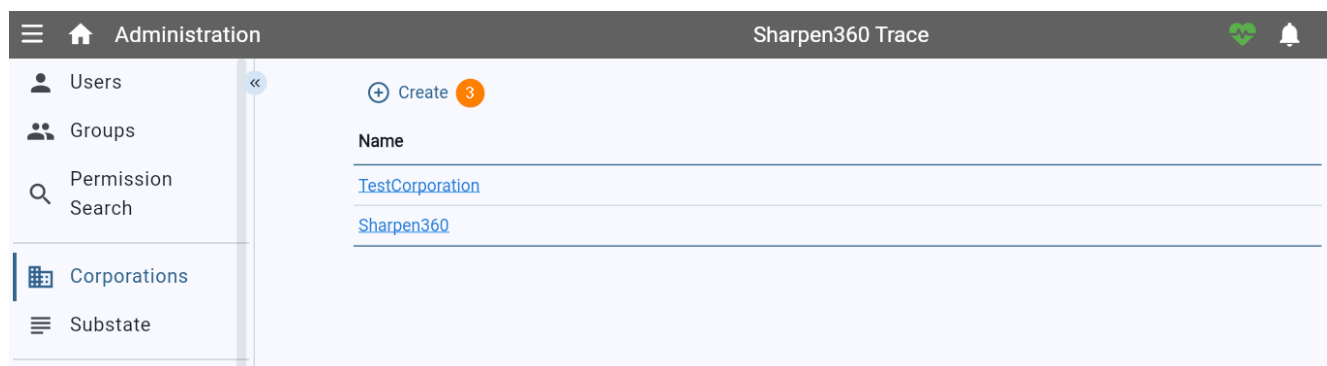
2 Corporations

You can see and access the corporations you are a member of from any page using the top left burger menu (1). If there are no corporations, it's because you're not a member of any. This is perfectly fine for most people, as you can still access assessments through my clusters and my assessments right here on the home page.

Id	Name	Project Id	Models	Cluster	Start Date	Assessors
IA-5	Assessment 5	DK-4482394	Automotive SPIC...	Internal assessments		BA CDB DRS PVP
IA-4	Assessment 4	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP
IA-3	Assessment 3	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP
IA-2	Assessment 2	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP
IA-1	Assessment 1	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP

If you're a system administrator, you can access the administration page (1) using the top left burger menu.

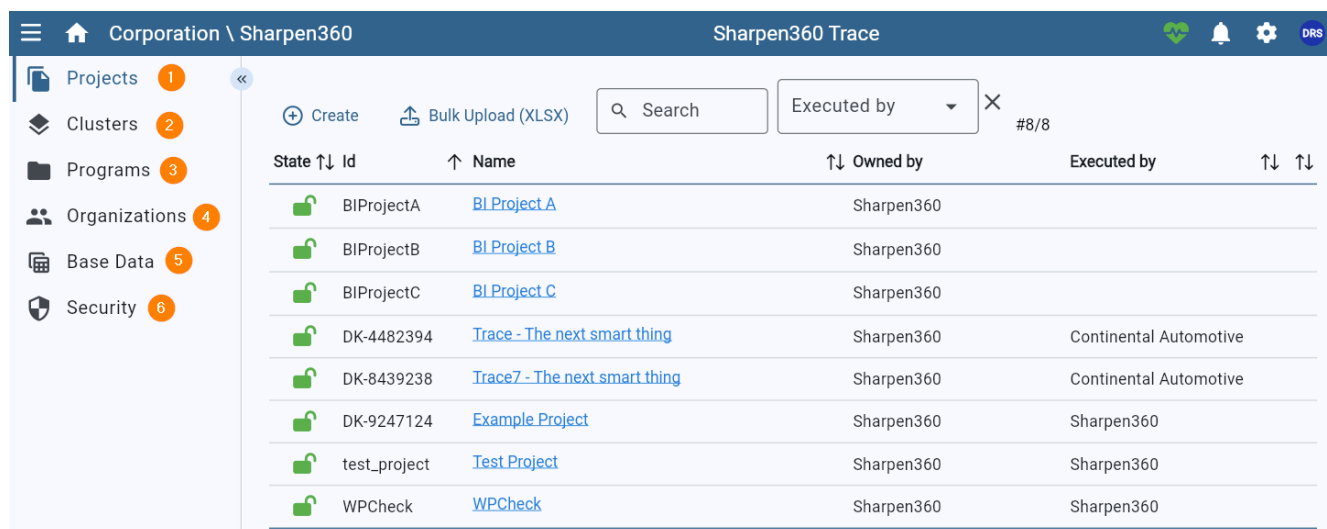
On this page you can see the corporations tab (2). This tab shows a list of all corporations and here you have the option to create a new corporation using the add button (3).



Side note/tip: This administration page also has a security tab where you can change your own or other people's global permissions. For example, you can give another person system administrator so that they can also access this page and administrate the application.

2.1 Manage Corporation

Clicking a corporation will take you to the corporation page seen below.



The corporation page has 6 tabs.

- (1) List of projects in the corporation
- (2) List of clusters in the corporation
- (3) List of programs in the corporation
- (4) List of organizations in the corporation
- (5) Base data is for editing information about the corporation, for example its name.
- (6) Security tab is like the rest of the application for editing permissions. Meaning you can assign corporation relevant roles to people either individually or through a group.

More on projects, clusters, programs and organizations later in this guide.



2.2 Corporation Roles

Role	Description
Corporation Administrator	<ul style="list-style-type: none">• Can see corporation• Can edit corporation• Can delete corporation• Can manage corporation members• Can see existing and create new clusters, projects, programs, organizations as well as each organization's org units and locations in the corporation• Can assign members to clusters, projects and programs that are part of the corporation
Corporation Editor	<ul style="list-style-type: none">• Can see corporation• Can edit corporation
Corporation Reader	<ul style="list-style-type: none">• Can see corporation



3 Clusters

Clusters are the same concept as they were in *Trace 5* (a grouping of assessments), except they now exist under a corporation. People can access clusters they are a member of through the home page (1).

Home

Sharpen360 Trace

My Assessments

My Clusters 1

State	Substate	Id	Name	Project Id	Models	Cluster	Start Date	Assessors
🔒		IA-5	Assessment 5	DK-4482394	Automotive SPIC...	Internal assessments		BA CDB DRS PVP
🔒		IA-4	Assessment 4	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP
🔒		IA-3	Assessment 3	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP
🔒		IA-2	Assessment 2	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP
🔒		IA-1	Assessment 1	DK-4482394	Automotive SPIC...	Internal assessments		BA DRS PVP

All is Cluster Admin [AllAdm]

All is Cluster Assessor [AllA]

Customers [Cust]

Customers (all blind) [CustB]

Internal assessments [IA]

Supplier assessments [SUP]

Test [TST]

BI Cluster [BI]

Tip: The “+” button beside the clusters can be used to add an assessment in the cluster directly from the home page. If they are greyed out, you don’t have permission to create assessments in that cluster.

If you are a member of a corporation, you can also access clusters through the corporation page using the cluster tab (2):

Corporation \ Sharpen360

Sharpen360 Trace

Projects

Clusters 2

Programs

Organizations

Base Data

Security

Create

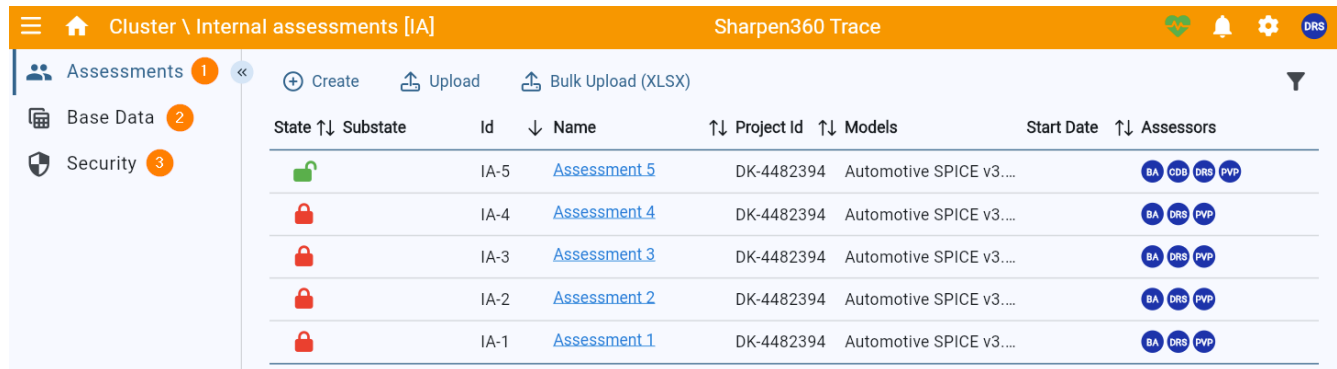
Search

State	Name	Key	Description
🔒	All is Cluster Admin	AllAdm	S360 team is Cluster Administrator
🔒	All is Cluster Assessor	AllA	S360 team is Cluster Assessor
🔒	BI Cluster	BI	
🔒	Customers	Cust	All customers are blind here
🔒	Customers (all blind)	CustB	Everybody is blind here
🔒	Internal assessments	IA	Cluster for internal assessments
🔒	Supplier assessments	SUP	Cluster for supplier assessments
🔒	Test	TST	Cluster for test assessments



3.1 Manage Cluster

Clicking a cluster will send you to the cluster page. The cluster page has three tabs:



State ↑↓	Substate	Id	Name	Project Id	Models	Start Date	Assessors
		IA-5	Assessment 5	DK-4482394	Automotive SPICE v3...		BA, CDB, DRS, PVP
		IA-4	Assessment 4	DK-4482394	Automotive SPICE v3...		BA, DRS, PVP
		IA-3	Assessment 3	DK-4482394	Automotive SPICE v3...		BA, DRS, PVP
		IA-2	Assessment 2	DK-4482394	Automotive SPICE v3...		BA, DRS, PVP
		IA-1	Assessment 1	DK-4482394	Automotive SPICE v3...		BA, DRS, PVP

- (1) List of assessments in the cluster
- (2) Editing of cluster base data
- (3) Security tab where you can manage members of the cluster.

3.2 Cluster Roles

Role	Description
Cluster Administrator	<ul style="list-style-type: none">• Full access to cluster, editing of it and management of its members• Can create assessments in cluster• Can open all assessments in cluster and read their records, read ratings, edit participants, change state and delete them
Cluster Assessor	<ul style="list-style-type: none">• Can see assessments in cluster• Can create assessments in cluster
Cluster Assessor (blind)	<ul style="list-style-type: none">• Can create assessments in cluster
Cluster QA	<ul style="list-style-type: none">• Can see assessments in cluster• Can open all assessments in cluster, export them and generate assessment reports

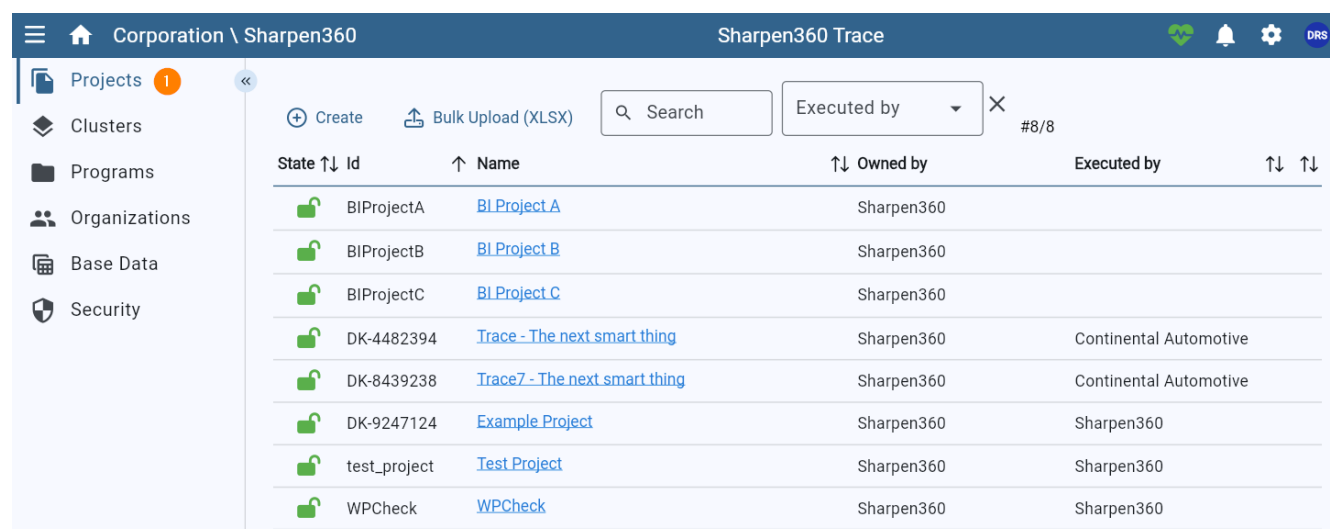


4 Projects

Projects are another way to group assessments. Projects have nothing to do with clusters. Projects are used to group all assessments related to a specific car for example. Projects gather data from assessments and can show you different overviews, graphs etc. A project can also define things like milestones and targets for the project.

To access a project, you must be a member of a corporation otherwise you can't see and enter projects.

Projects are accessed and seen on the corporation page (1):



State	Id	Name	Owned by	Executed by
🔒	BIProjectA	BIProject A	Sharpen360	
🔒	BIProjectB	BI Project B	Sharpen360	
🔒	BIProjectC	BI Project C	Sharpen360	
🔒	DK-4482394	Trace - The next smart thing	Sharpen360	Continental Automotive
🔒	DK-8439238	Trace7 - The next smart thing	Sharpen360	Continental Automotive
🔒	DK-9247124	Example Project	Sharpen360	Sharpen360
🔒	test_project	Test Project	Sharpen360	Sharpen360
🔒	WPCheck	WPCheck	Sharpen360	Sharpen360

Opening a project sends you to the project page:



Project \ Trace - The next smart thing [DK-4482394] Sharpen360 Trace

Activities 1 Project Assessments Create Bulk Upload (XLSX)

Activities Timeline 2

Nonconformances 3

Targets 4

Milestones 5

Metrics 6

Linked Programs 7

Base Data 8

Security 9

Status	Substate	Id	Name	Model	End ...	Assessors	Milest...	NC Status	Ratings
🔒		TST-12	Drivetrain4Duckmobile	Agile SPICE v1.3 - iso33020_nplf Automotive SPICE v3.1 - iso33020_nplf	2021-06-18	BA MMT MN PVP TU1 TU2			1 2
🔒		IA-5	Assessment 5	Automotive SPICE v3.1 - iso33020_nplf	2024-04-03	BA CDB DRS PVP			3
🔒		IA-4	Assessment 4	Automotive SPICE v3.1 - iso33020_nplf	2024-02-05	BA DRS PVP			1 2 4 3
🔒		IA-3	Assessment 3	Automotive SPICE v3.1 - iso33020_nplf	2023-11-07	BA DRS PVP			1 2 2 1
🔒		IA-2	Assessment 2	Automotive SPICE v3.1 - iso33020_nplf	2023-07-06	BA DRS PVP			2 3 1
🔒		IA-1	Assessment 1	Automotive SPICE v3.1 - iso33020_nplf	2023-04-06	BA DRS PVP			9 5 2

The project page has 9 tabs. The following sections will go over these and explain what you see in each one.

- (1) Activities give you an overview of the assessments in the project
- (2) Activity Timeline shows the assessments on a timeline
- (3) Nonconformances are created from assessment records and are shown here
- (4) Targets are target ratings for specific model nodes
- (5) Milestones for the project
- (6) Metrics can show a matrix of ratings, actuals and NC status across assessment for a selected model
- (7) Linked Programs show the programs this project is a part of
- (8) Base data is for editing or viewing base data for the project such as its name
- (9) Security is for assigning members to the project

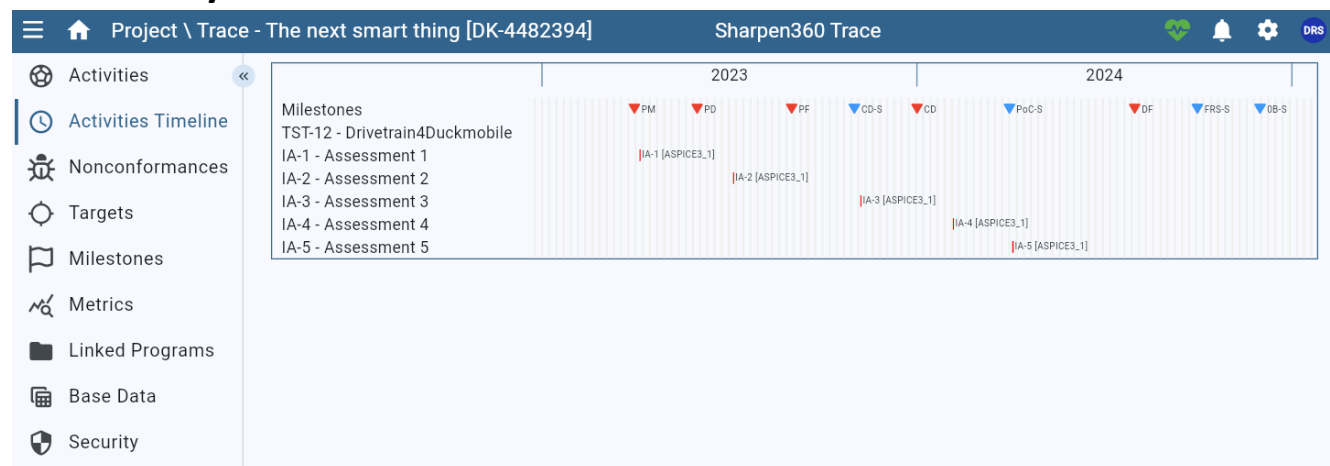


4.1 Activities

Project \ Trace - The next smart thing [DK-4482394] Sharpen360 Trace									
Project Assessments + Create 📁 Bulk Upload (XLSX)									
Status	Substate	Id	Name	Model	End ...	Assessors	Milest...	NC Status	Ratings
🔒		TST-12	Drivetrain4Duckmobile	Agile SPICE v1.3 - iso33020_nplf Automotive SPICE v3.1 - iso33020_nplf	2021-06-18	BA MM1 MN PVP TU1 TU2			1 2
🔒		IA-5	Assessment 5	Automotive SPICE v3.1 - iso33020_nplf	2024-04-03	BA CDB DRS PVP			3
🔒		IA-4	Assessment 4	Automotive SPICE v3.1 - iso33020_nplf	2024-02-05	BA DRS PVP			1 2 4 3
🔒		IA-3	Assessment 3	Automotive SPICE v3.1 - iso33020_nplf	2023-11-07	BA DRS PVP			1 2 2 1
🔒		IA-2	Assessment 2	Automotive SPICE v3.1 - iso33020_nplf	2023-07-06	BA DRS PVP			2 3 1
🔒		IA-1	Assessment 1	Automotive SPICE v3.1 - iso33020_nplf	2023-04-06	BA DRS PVP			9 5 2

Activities give you an overview of the assessments in the project.

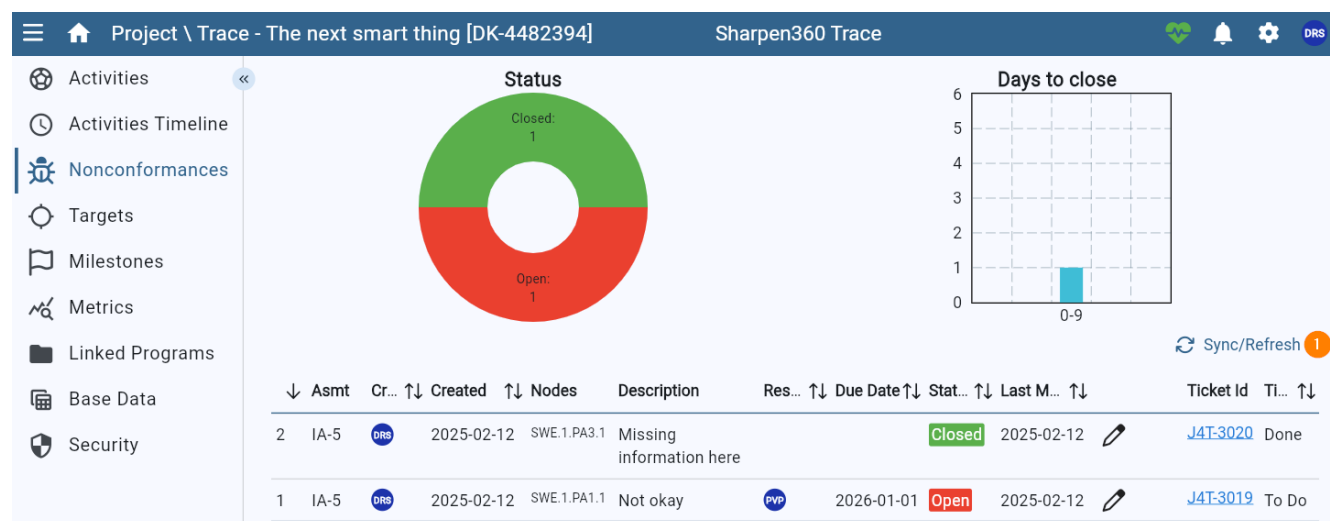
4.2 Activity Timeline



A timeline showing how assessments are spread over time. You can drag with the mouse to move the timeline and use ctrl + scroll wheel to zoom in and out. The timeline also shows milestones so that you can get an overview of how the assessments are placed compared to these. Milestones will be covered later in this guide (4.5).

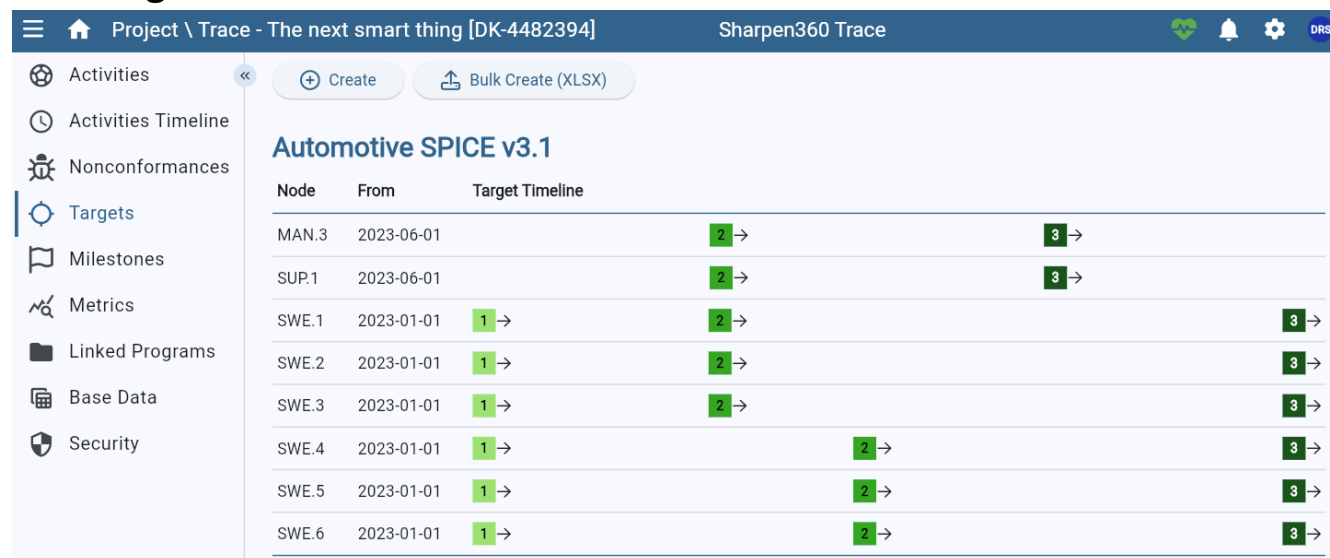


4.3 Nonconformances



Nonconformances created from assessment records end up here. A lot of the information displayed here is taken from the record such as the description and the nodes. The main functionality is the ability to push nonconformances to a ticket system e.g. jira as tickets and using the Sync/Refresh Button (1) to get the latest status of the ticket from the system. Responsible User and Due Dates are given when creating the nonconformance from within an assessment.

4.4 Targets



Targets are target ratings defined for specific model nodes across all assessments in the project. Each row in this grid represents a node and each node can have an unlimited number of targets. The target timeline column gives a visual illustration of how the different targets for the node are spread over time. Each target



can be hovered to display the specific from- and to date of the target as well as a button to delete the target. Targets are used in the metrics tab, which will be explained later in this guide (4.6).

4.5 Milestones

Project \ Trace - The next smart thing [DK-4482394]		Sharpen360 Trace		
Milestones Create Bulk Upload (XLSX)				
Short	Name	Date	External	
= PM	Product-Mission	2023-04-01	▼	Edit
= PD	Product-Definition	2023-06-01	▼	Edit
= PF	Project-Feasibility	2023-09-01	▼	Edit
= CD-S	Concept-Development-Sample	2023-11-01	▼	Edit
= CD	Concept-Decision	2024-01-01	▼	Edit
= PoC-S	Proof-of-Concept Sample	2024-03-31	▼	Edit
= DF	Concept Freeze	2024-07-31	▼	Edit
= FRS-S	Functional Requirements Specification Sample	2024-09-30	▼	Edit
= OB-S	0-Bug-Samples	2024-11-30	▼	Edit
= PS	Pilot Series	2025-04-01	▼	Edit
= VMP	Validate production process for Mass Production	2025-08-01	▼	Edit
= SoP	Start of Production	2025-12-01	▼	Edit

Milestones are as the word suggests milestones for the project. Milestones are used in the activities tab that we covered earlier in this guide (4.1).

4.6 Metrics

- Activities
- Activities Timeline
- Nonconformances
- Targets
- Milestones
- Metrics
- Linked Programs
- Base Data
- Security

Select Model

Automotive SPICE v3.1

Automotive SPICE v3.1

[Download report](#)

	2021-06-18	2023-04-06	2023-07-06	2023-11-07	2024-02-05	2024-04-03		Trend	Actual	Target	NC Status
ACQ.4 Supplier Monitoring		2							2		
SYS.1 Requirements Elicitation											
SYS.2 System Requirements Analysis		1			2			↗	2		
SYS.3 System Architectural Design		1			2			↗	2		
SYS.4 System Integration and Integration Test		0							0		
SYS.5 System Qualification Test		0			-				0		
SWE.1 Software Requirements Analysis		1	3	2	3	2		↘	2	3	3
SWE.2 Software Architectural Design	1	0	2	1	1	2		↗	2	3	3
SWE.3 Software Detailed Design and Unit Construction	0	1	1	0	1			↗	1	3	3
SWE.4 Software Unit Verification		0	2	0	2			↗	2	3	3
SWE.5 Software Integration and Integration Test	1	0	1	1	2	2		→	2	3	3
SWE.6 Software Qualification Test		0	2	-	0			↘	0	3	3
SUP.1 Quality Assurance		0							0	3	3
SUP.8 Configuration Management		2			3			↗	3		
SUP.9 Problem Resolution Management		0							0		
SUP.10 Change Request Management		0			3			↗	3		
MAN.3 Project Management		1							1	3	3

The metrics tab shows an overview of ratings across assessments in the project. Assessments are shown as columns and can be identified by their end date (1). The metric has an “Actual” column (3), which is the rating for the node on the newest assessment that has a rating for the node. “Target” column shows the target for the node (4). These two columns make it possible to determine if the target is met for the node, illustrated by the cross or check in the bottom right corner of the rating (6). The metric also has a “Trend” column (2), which shows if the rating has gone up or down. Lastly, the metric shows the nonconformance status for each node (5).



4.7 Linked Programs

The linked programs tab shows the programs which the project is part of. You can press “Add Program” (1) to link the project to a new program. If you want to remove a project from a program, you can remove it by clicking the cross (2).

4.8 Manage Project

You can manage the project using the Base Data tab (1) and the Security tab (2). Like every other page the base data is where you change the project name etc. and the security tab is where you manage the project’s members.



4.9 Project Roles

Role	Description
Project Administrator	<ul style="list-style-type: none">• Can see project• Can edit project• Can delete project• Can manage project members
Project Editor	<ul style="list-style-type: none">• Can see project• Can edit project
Project Reader	<ul style="list-style-type: none">• Can see project



5 Programs

Like projects you can see and access programs through the corporation page only via the program tab:

Corporation \ Sharpen360		Sharpen360 Trace	
Projects	<<	+ Create	
Clusters			
Programs			
Organizations			
Base Data			
Security			

External Id	↑↓ Name	↑	↑↓
Program1	Program 1		
Program2	Program 2		

Clicking a program opens the program page:

Program \ Program 1 [Program1]		Sharpen360 Trace	
Linked Projects 1	<<		
Metrics 2			
Base Data 3			
Security 4			

Id	↑↓ Name	↑↓
DK-9247124	Example Project	⊗
DK-4482394	Trace - The next smart thing	⊗
WPCheck	WPCheck	⊗

The page has 4 tabs. Base data (3) is for changing base data about the program and security (4) is for managing members of the program.

The first tab, “Linked Projects” (1), show the projects which are part of the program. Projects can only be added to a program through the project, but you have the option to remove them here.

As of now the metrics tab (2) only has the option to download an xml file for the program.

5.1 Program roles

Role	Description
Program Administrator	<ul style="list-style-type: none">• Can see program• Can edit program• Can delete program• Can manage program members
Program Editor	<ul style="list-style-type: none">• Can see program• Can edit program
Program Reader	<ul style="list-style-type: none">• Can see program



6 Organizations

Organizations are accessed through the corporation page via the organizations tab:

Corporation \ Sharpen360 Sharpen360 Trace

Organizations Create Bulk Upload (XLSX) Search arpen360 #1/38

Name	State
Sharpen360	Enabled

Organizations are subparts of the corporation and can be linked to projects, meaning you can make different organizations responsible for projects. Organizations have organization units and locations under them. These can be seen by entering the organization page by clicking an organization. The two tabs can be seen below.

Organization \ Sharpen360 Sharpen360 Trace

Org Units Locations Create (1) Bulk Upload (XLSX) Search #4/4

Short	Name	State
EN	Engines	Enabled
S360	Sharpen360	Enabled
SWS	SW Systems	Enabled
WH	Wheels	Enabled

Organization \ Sharpen360 Sharpen360 Trace

Org Units Locations Create (1) Bulk Upload (XLSX) Search #5/5

Short	Name	State
S360_A	Aarhus, DK	Enabled
S360_B	Böblingen, DE	Enabled
S360_F	Frankfurt, DE	Enabled
S360_H	Herzogenaurach, DE	Enabled
S360_V	Vancouver, BC, CAN	Enabled

You can add org units and locations by using the add button (1) and edit them by using the edit button (2).

You can assign org units and locations to assessments.



7 Other Information

7.1 Uploading entities using excel

Upload buttons around the app can be used to upload data with an excel file, instead of having to create everything through UI one by one. Below is a table showing which template files are used for which entities in the application. If you're missing one or more template files and want them, please contact us at support@sharpen360.com. For the excel files that have more than one sheets/entities, they are still uploaded individually. This means that for each entity in the file you want to upload, you need to use the corresponding upload button in the UI.

Entity	Upload template file name
Organizations	Bootstrap_Organizations.xlsx
Organization Units (Org Units)	Bootstrap_OrgUnits_Locations.xlsx
Locations	Bootstrap_OrgUnits_Locations.xlsx
Projects	Bootstrap_Projects.xlsx
Targets	Bootstrap_Milestones_Targets.xlsx
Milestones	Bootstrap_Milestones_Targets.xlsx
Assessments	Bootstrap_Assessments.xlsx



8 Document information

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Rev.	Date	Changed by	Description of changes
3	2/4 2025	MNM	<ul style="list-style-type: none">Minor changes to match Trace v6.0.3
2	14/2 2025	DRS	<ul style="list-style-type: none">First, complete version
1	1/7 2025	PVP	<ul style="list-style-type: none">Initial version