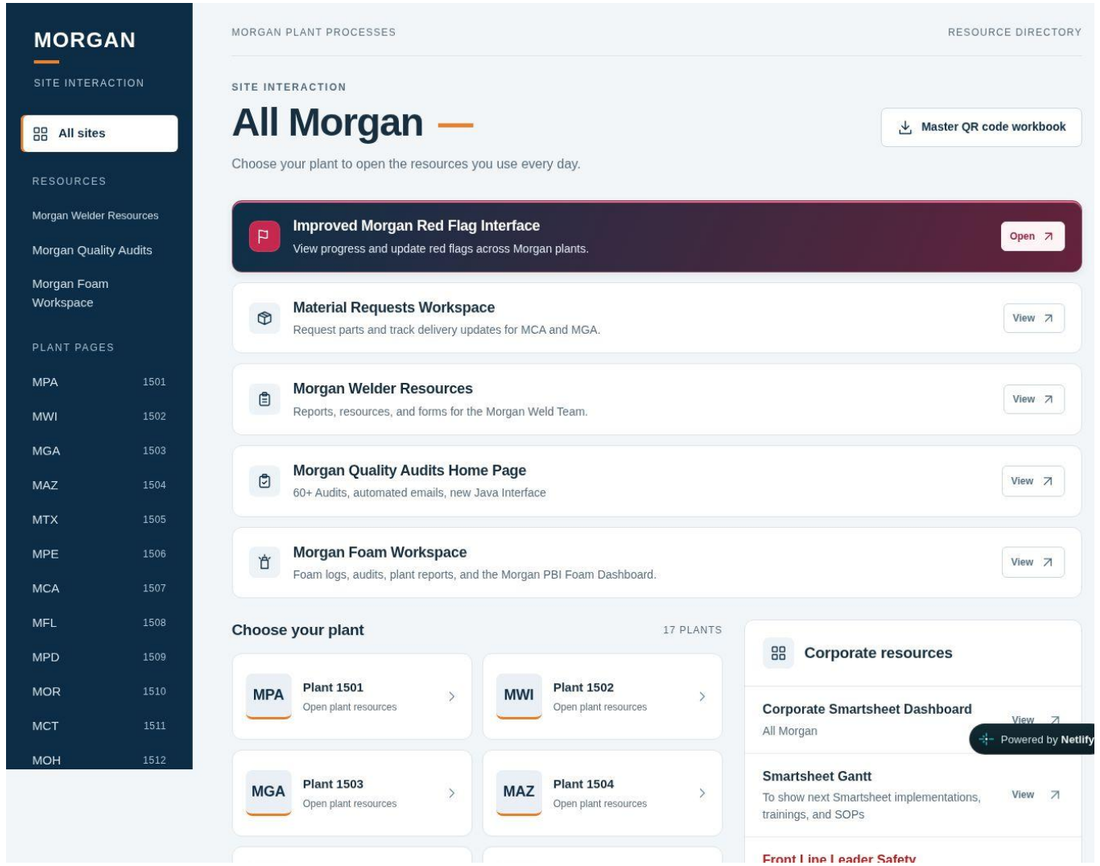
Morgan Smartsheet Modules

Forms and operational reporting across **17 Morgan plants**, simplified by a hosted **1 stop shop** website, no login required, for any of it, unless we want to require passwords.



01 **Red Flag Interface**

02 **Quality Auditing**

03 **Leader Standard Work**

04 **Crane Reporting**

05 **Welding**

06 **Open Action Items**

07 **Gemba Walks**

08 **Safety Committee**

09 **BBSO & Safety Engagement**

10 **5S Audits**

11 **Ergonomic Projects**

12 **Material Requests**

13 **Material Controls**

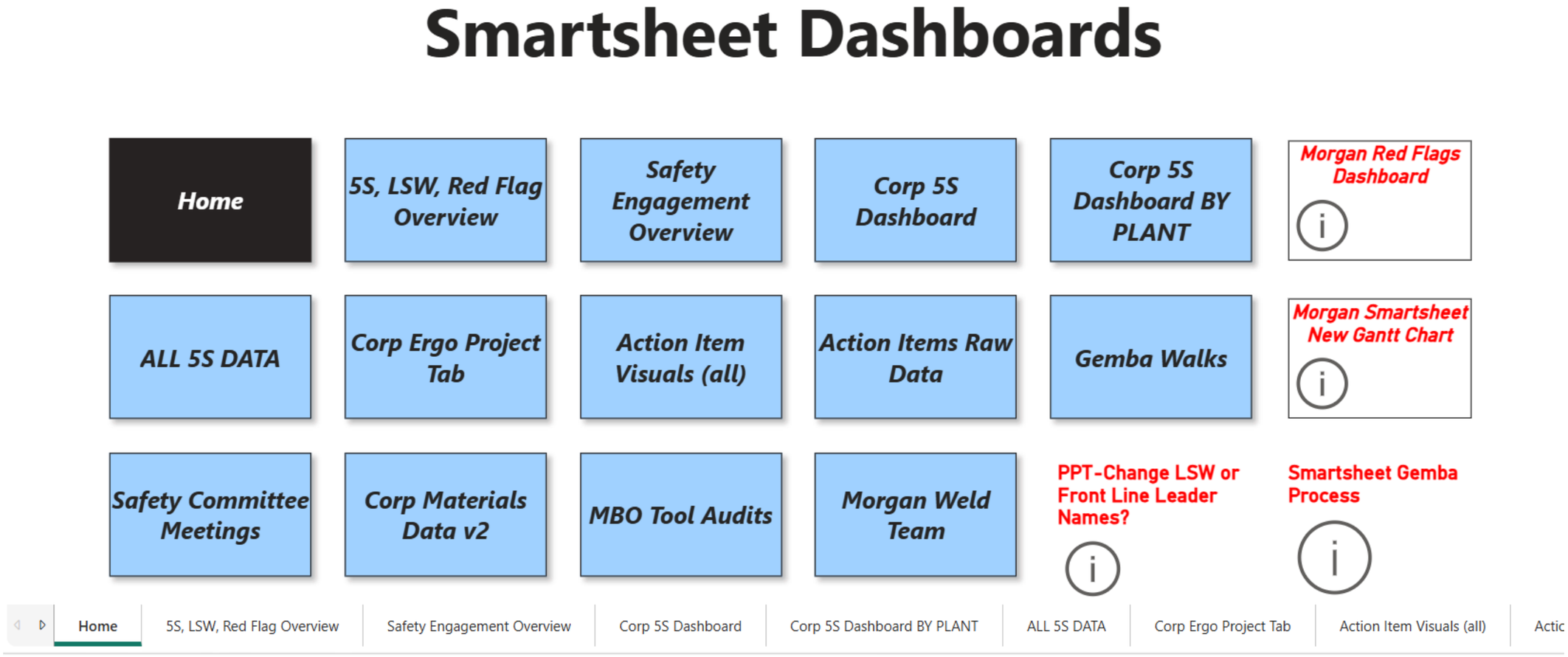
14 **Foam Tracking**

15 **Scrap and Substitution**

Morgan Smartsheet Dashboard

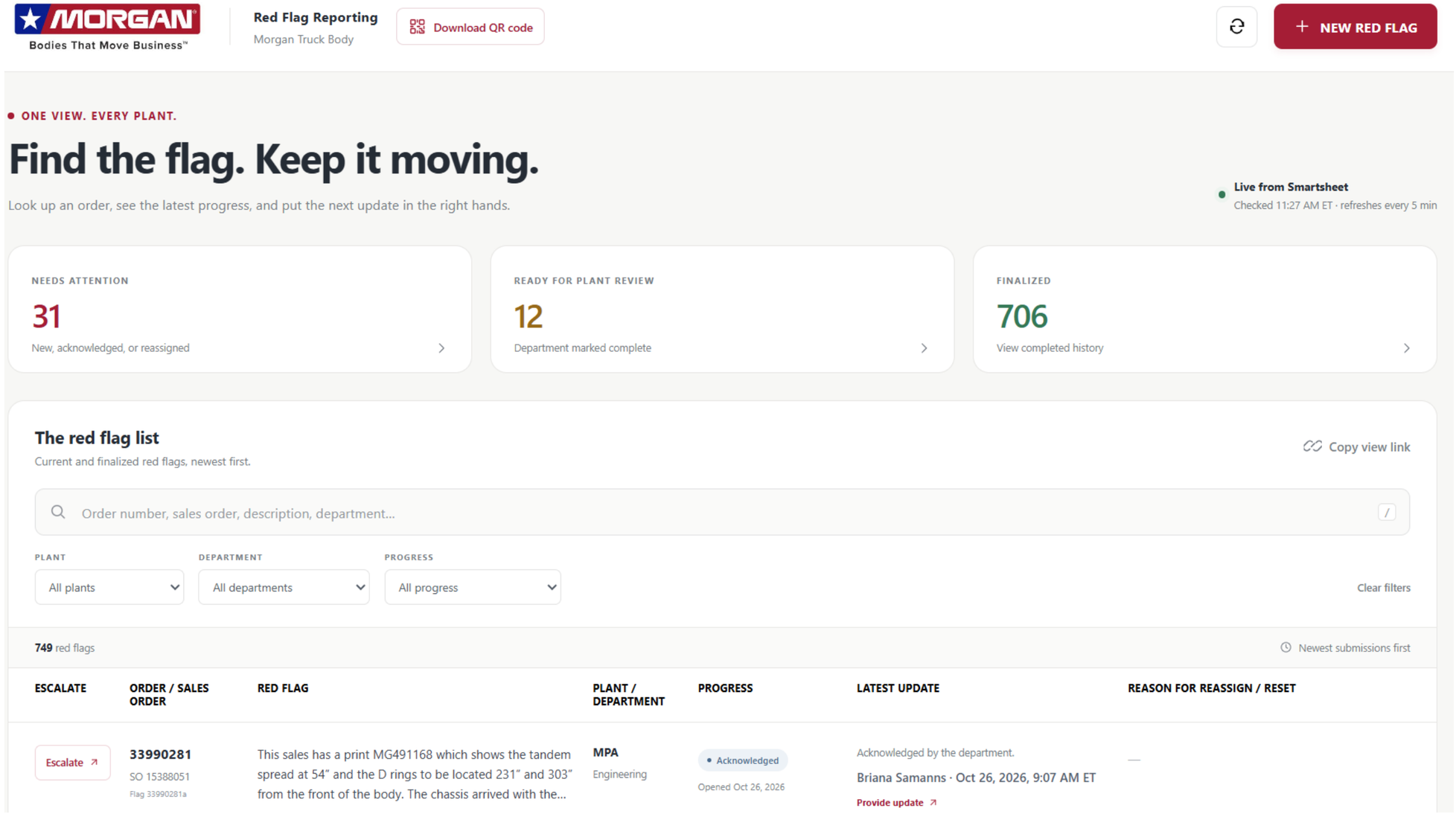
Smartsheet is natively Power BI, and also API compatible





Red Flag Java Interface

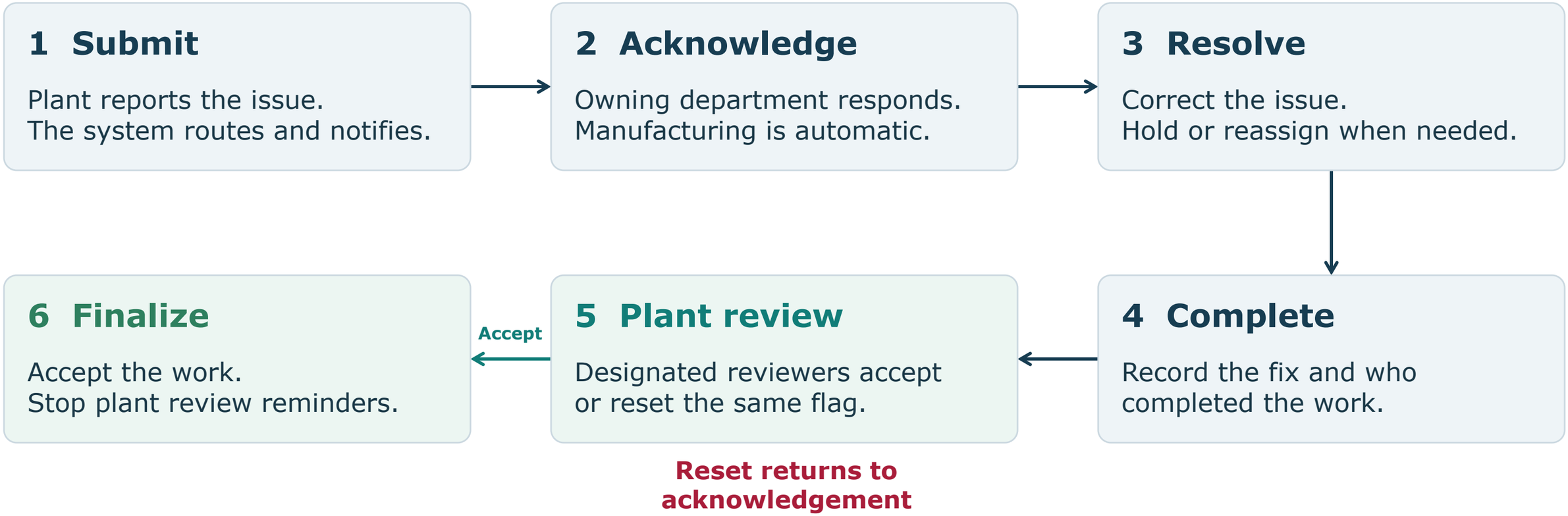
One view of current work and completed history, immediate statuses **across the nation, no login required**



Search an order, review the latest update and route the next response.

Red Flag Process

Department completion goes to plant review



1 hour

Acknowledgement reminder

90 minutes

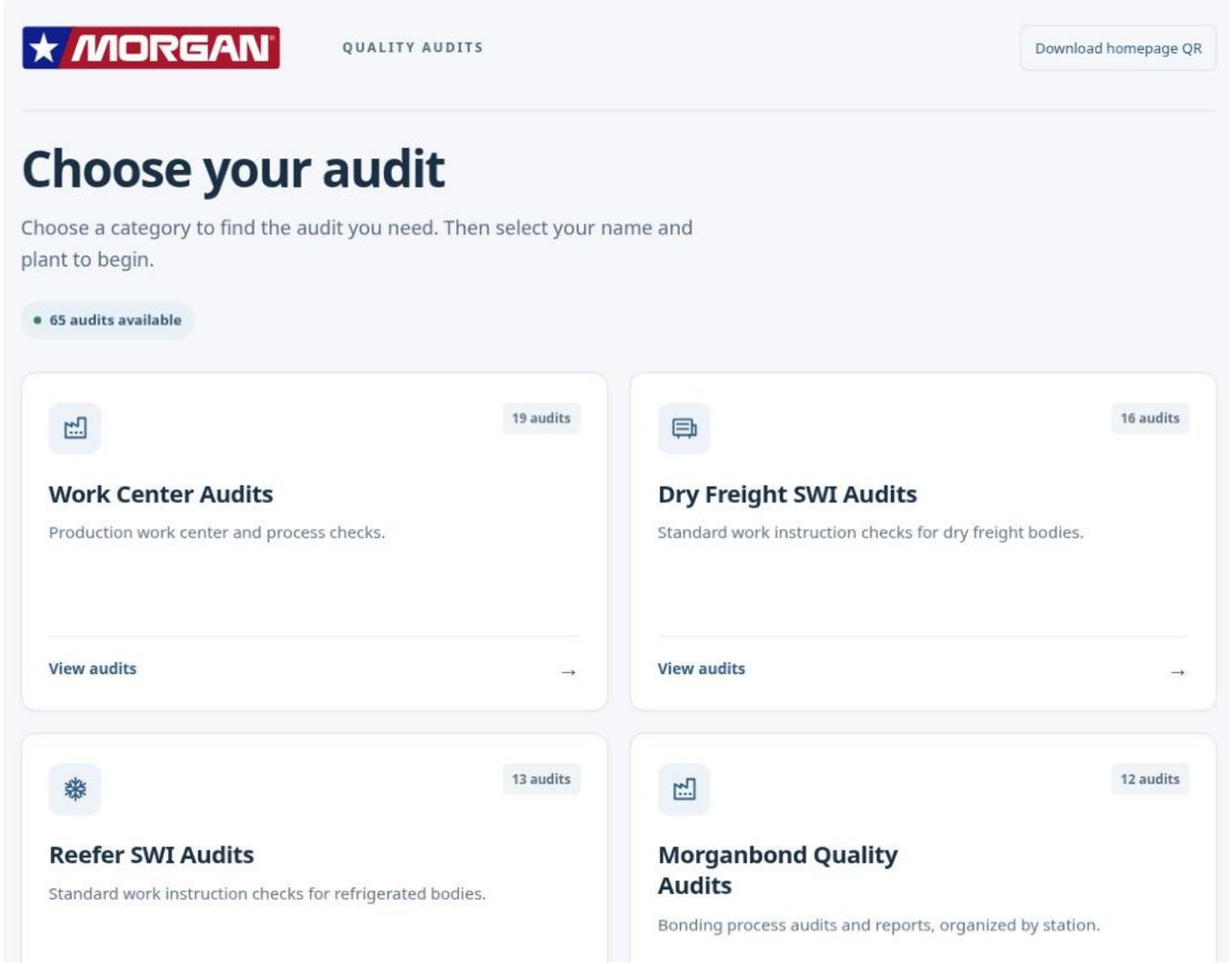
Completion reminder after acknowledgement

Every 2 hours

Plant review reminders

Quality Auditing Java Web App

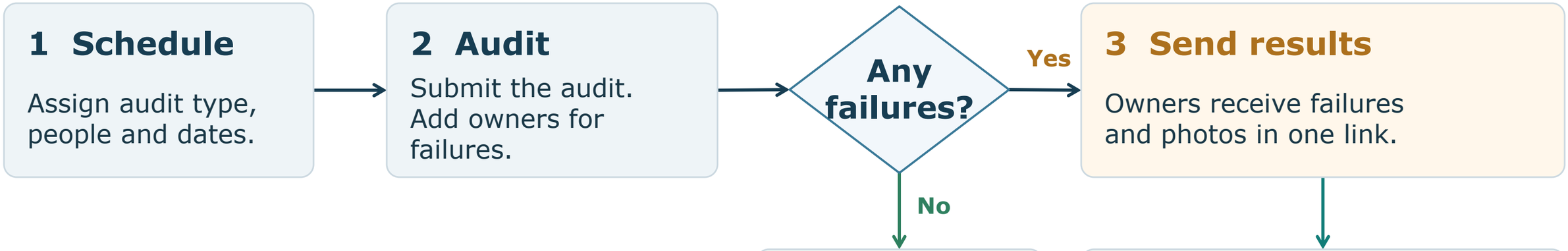
Audit selection, schedules and follow-up, all reports on hosted java website, **no login required**



Work center, SWI and Morganbond audits share one entry point.

Quality Audit Process

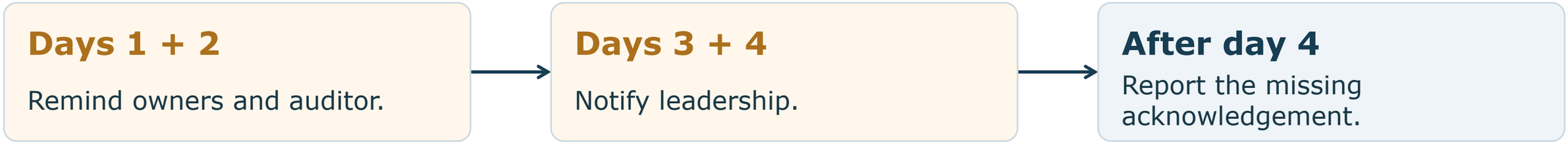
Failures reach the responsible person for acknowledgement



Missing an audit?

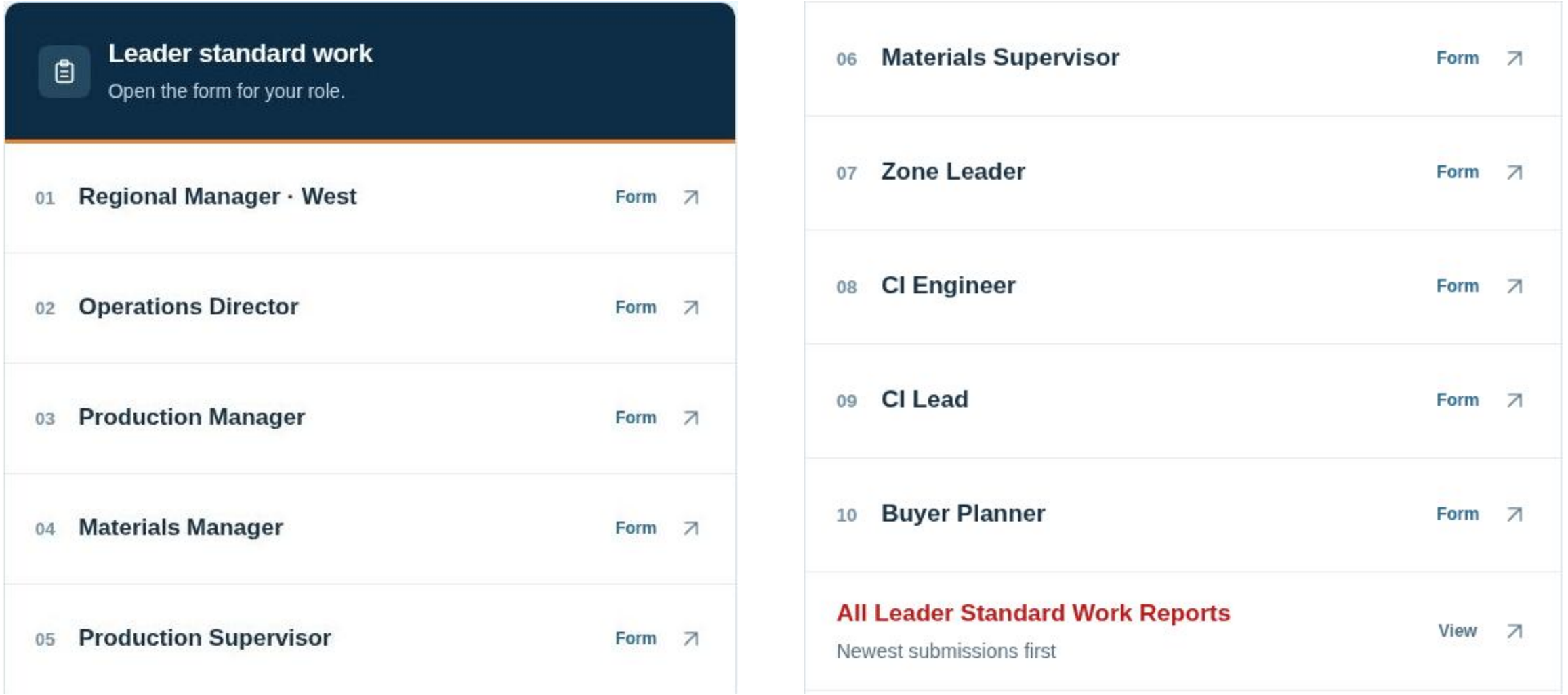
Assignment reminders continue Monday and Thursday, 8 AM Pacific.

If no one acknowledges



26 Types of Leader Standard Work

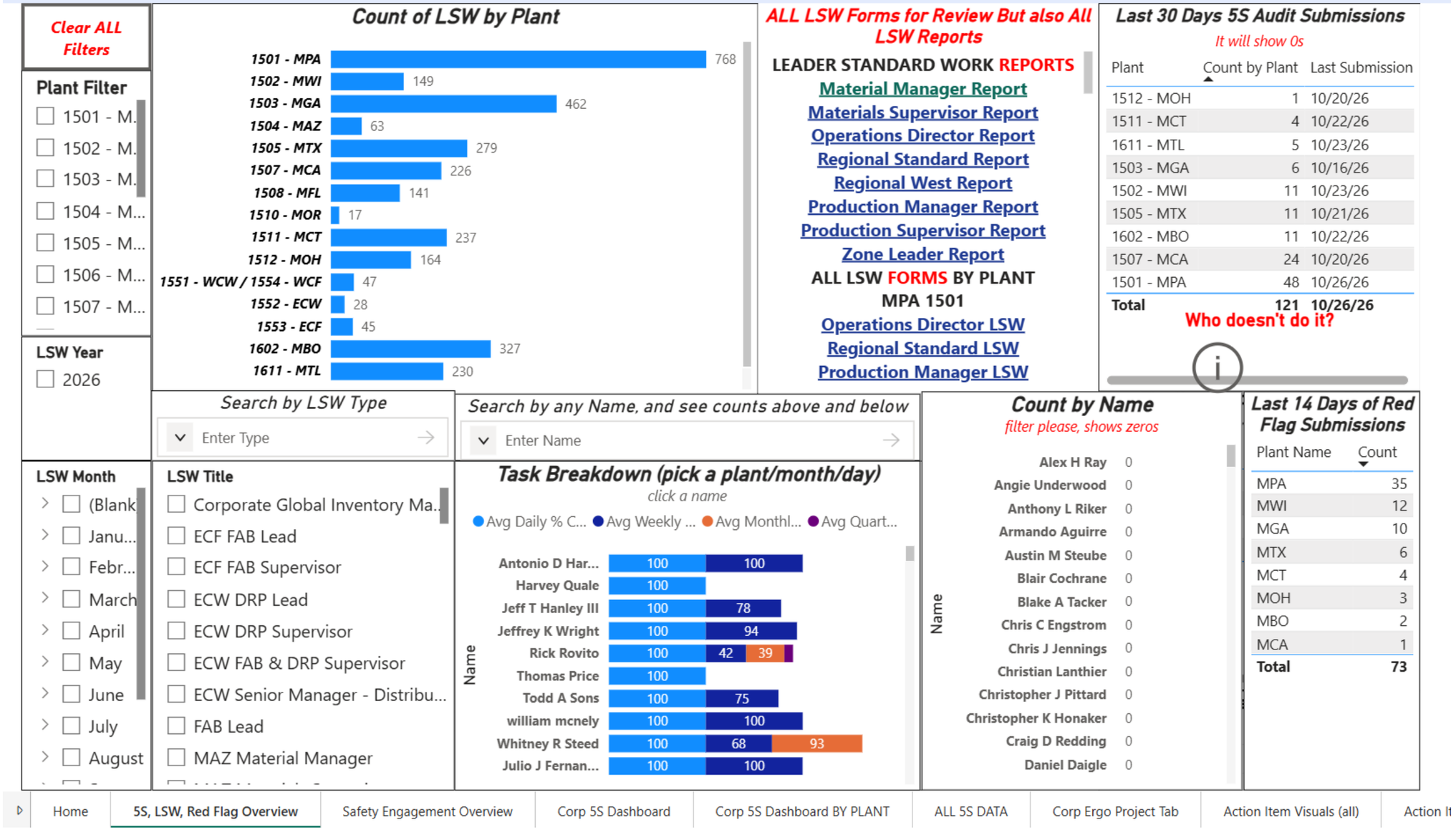
Role forms and shared reports on **each of the 17 Plant Pages** from the main site



Main site, MCA plant page

Leader Standard Work Reporting

Power BI dashboard



No Login Required Standard Work Reports

Each Plant page indicates **immediate access**

Master ALL LSW Reports (View Only) ⋮ smartsheet

Entire Organization Operations

- Regional Standard
- Regional West
- Operations Director
- Production Manager
- Production Supervisor
- Zone Leader
- Who does not submit Standard Work by Days Since
- CI Engineer LSW
- CI Lead LSW
- CI Engineer & CI Lead — All Plants

Entire Organization Materials

- Global Inventory Manager
- Senior Manager — Distribution & Fabrication
- Material Manager
- Materials Supervisor
- Fab & DRP Supervisor
- FAB Supervisor
- DRP Supervisor
- FAB Lead
- DRP Lead
- All FAB/DRP Supervisors & Senior Manager — Newest First
- All FAB/DRP Leads — Newest First
- Buyer Planner — All Plants — Newest First

MPA

- Regional Level LSW
- Director LSW
- Production Manager LSW
- Materials Manager LSW
- Production Supervisor LSW
- Materials Supervisor LSW
- Zone Leader LSW
- CI Engineer LSW
- CI Lead LSW
- Buyer Planner LSW

MWI

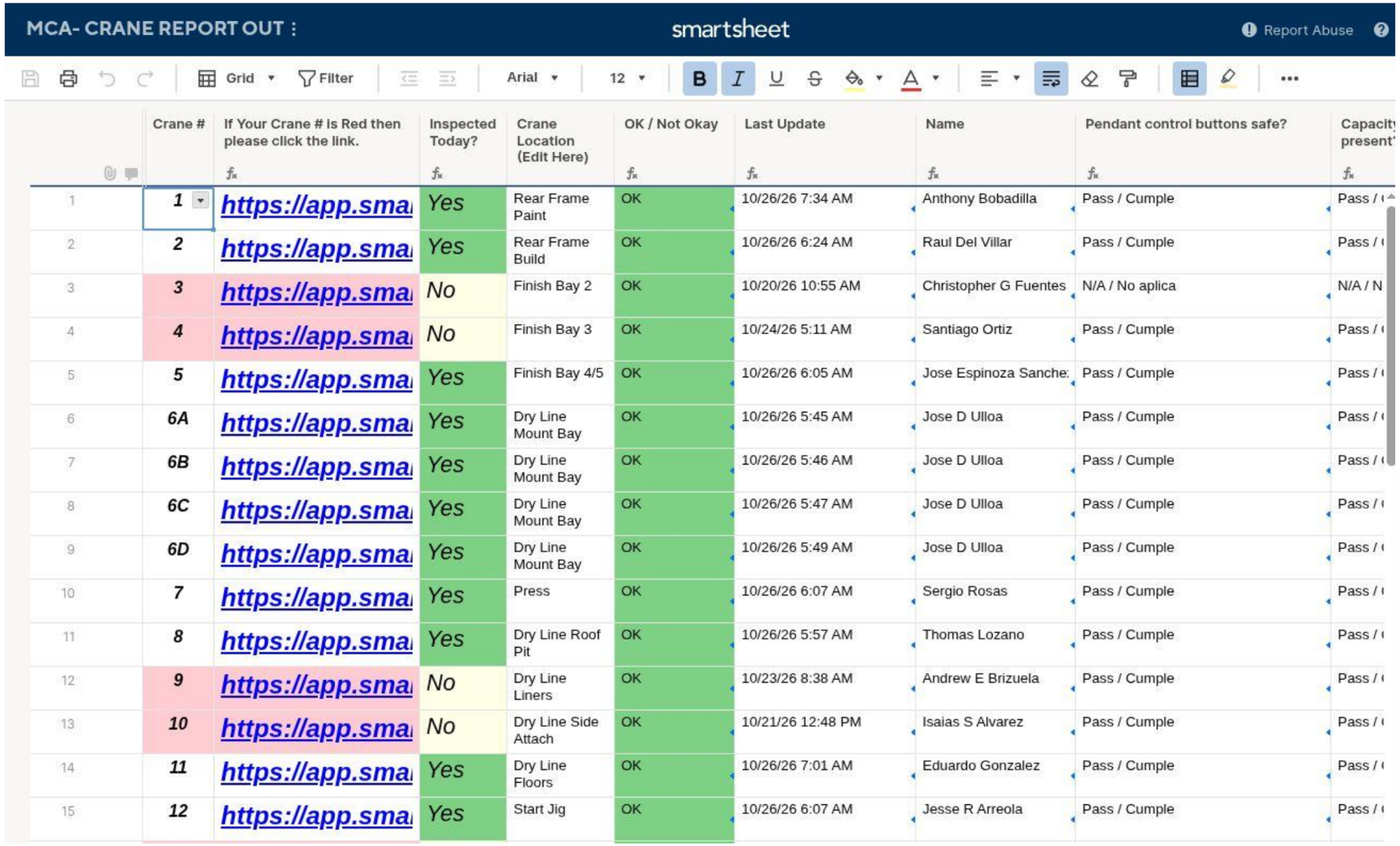
- Regional Level LSW
- Director LSW
- Production Manager LSW
- Materials Manager LSW
- Production Supervisor LSW
- Materials Supervisor LSW
- Zone Leader LSW
- CI Engineer LSW
- CI Lead LSW
- Buyer Planner LSW

MGA

- Regional Level LSW
- Director LSW
- Production Manager LSW
- Materials Manager LSW
- Production Supervisor LSW
- Materials Supervisor LSW
- Zone Leader LSW
- CI Engineer LSW
- CI Lead LSW
- Buyer Planner LSW

Crane Reporting

Daily inspection status by crane

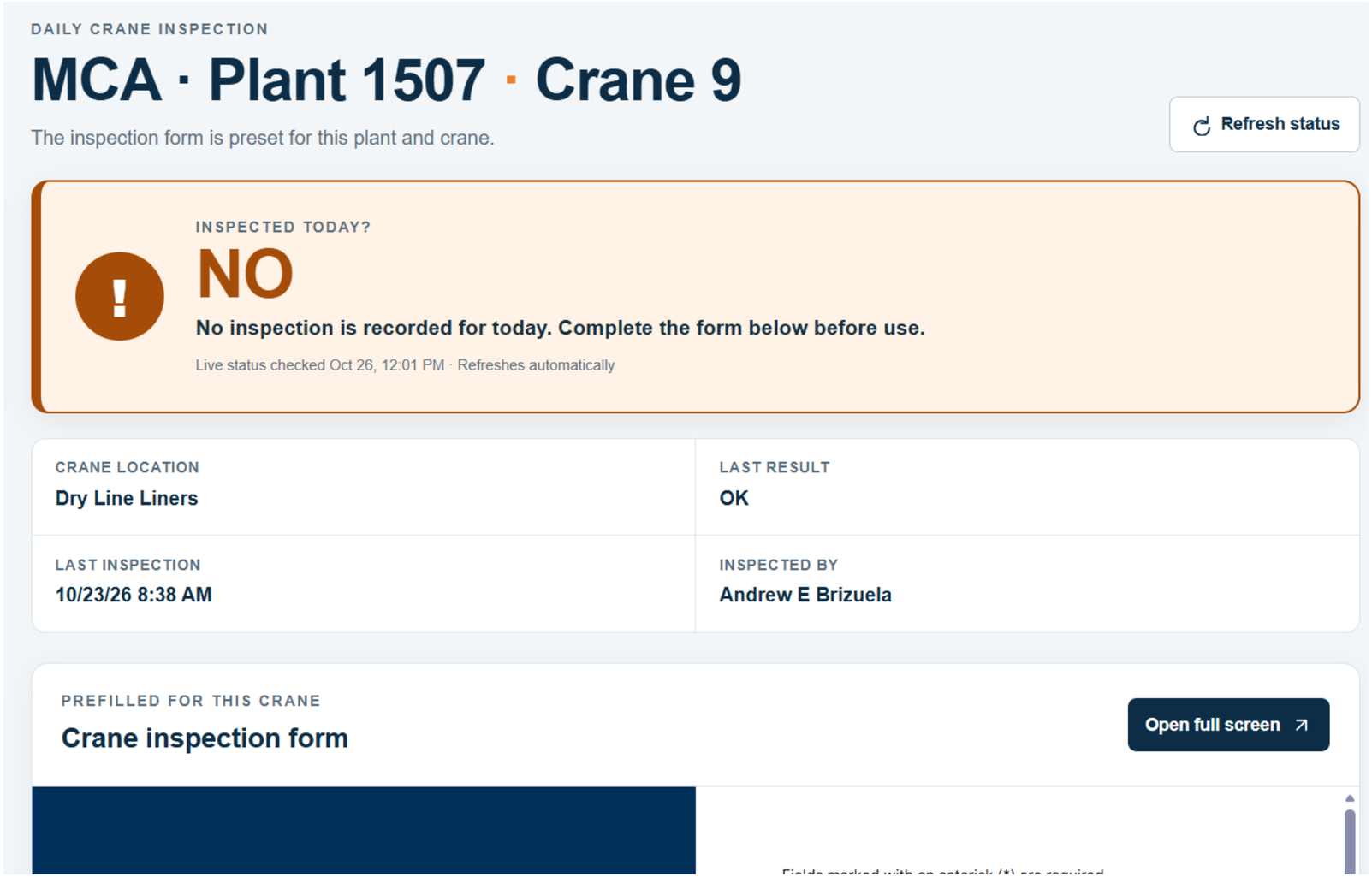


	Crane #	If Your Crane # is Red then please click the link.	Inspected Today?	Crane Location (Edit Here)	OK / Not Okay	Last Update	Name	Pendant control buttons safe?	Capacity present
1	1	https://app.sma	Yes	Rear Frame Paint	OK	10/26/26 7:34 AM	Anthony Bobadilla	Pass / Cumple	Pass /
2	2	https://app.sma	Yes	Rear Frame Build	OK	10/26/26 6:24 AM	Raul Del Villar	Pass / Cumple	Pass /
3	3	https://app.sma	No	Finish Bay 2	OK	10/20/26 10:55 AM	Christopher G Fuentes	N/A / No aplica	N/A / N
4	4	https://app.sma	No	Finish Bay 3	OK	10/24/26 5:11 AM	Santiago Ortiz	Pass / Cumple	Pass /
5	5	https://app.sma	Yes	Finish Bay 4/5	OK	10/26/26 6:05 AM	Jose Espinoza Sanche:	Pass / Cumple	Pass /
6	6A	https://app.sma	Yes	Dry Line Mount Bay	OK	10/26/26 5:45 AM	Jose D Ulloa	Pass / Cumple	Pass /
7	6B	https://app.sma	Yes	Dry Line Mount Bay	OK	10/26/26 5:46 AM	Jose D Ulloa	Pass / Cumple	Pass /
8	6C	https://app.sma	Yes	Dry Line Mount Bay	OK	10/26/26 5:47 AM	Jose D Ulloa	Pass / Cumple	Pass /
9	6D	https://app.sma	Yes	Dry Line Mount Bay	OK	10/26/26 5:49 AM	Jose D Ulloa	Pass / Cumple	Pass /
10	7	https://app.sma	Yes	Press	OK	10/26/26 6:07 AM	Sergio Rosas	Pass / Cumple	Pass /
11	8	https://app.sma	Yes	Dry Line Roof Pit	OK	10/26/26 5:57 AM	Thomas Lozano	Pass / Cumple	Pass /
12	9	https://app.sma	No	Dry Line Liners	OK	10/23/26 8:38 AM	Andrew E Brizuela	Pass / Cumple	Pass /
13	10	https://app.sma	No	Dry Line Side Attach	OK	10/21/26 12:48 PM	Isaias S Alvarez	Pass / Cumple	Pass /
14	11	https://app.sma	Yes	Dry Line Floors	OK	10/26/26 7:01 AM	Eduardo Gonzalez	Pass / Cumple	Pass /
15	12	https://app.sma	Yes	Start Jig	OK	10/26/26 6:07 AM	Jesse R Arreola	Pass / Cumple	Pass /

Inspection status, current condition, crane location and last update in one report.

Crane Reporting

Daily inspection status by crane, each crane has it’s own Java QR Code. **Scan, Scroll, and fill form.**



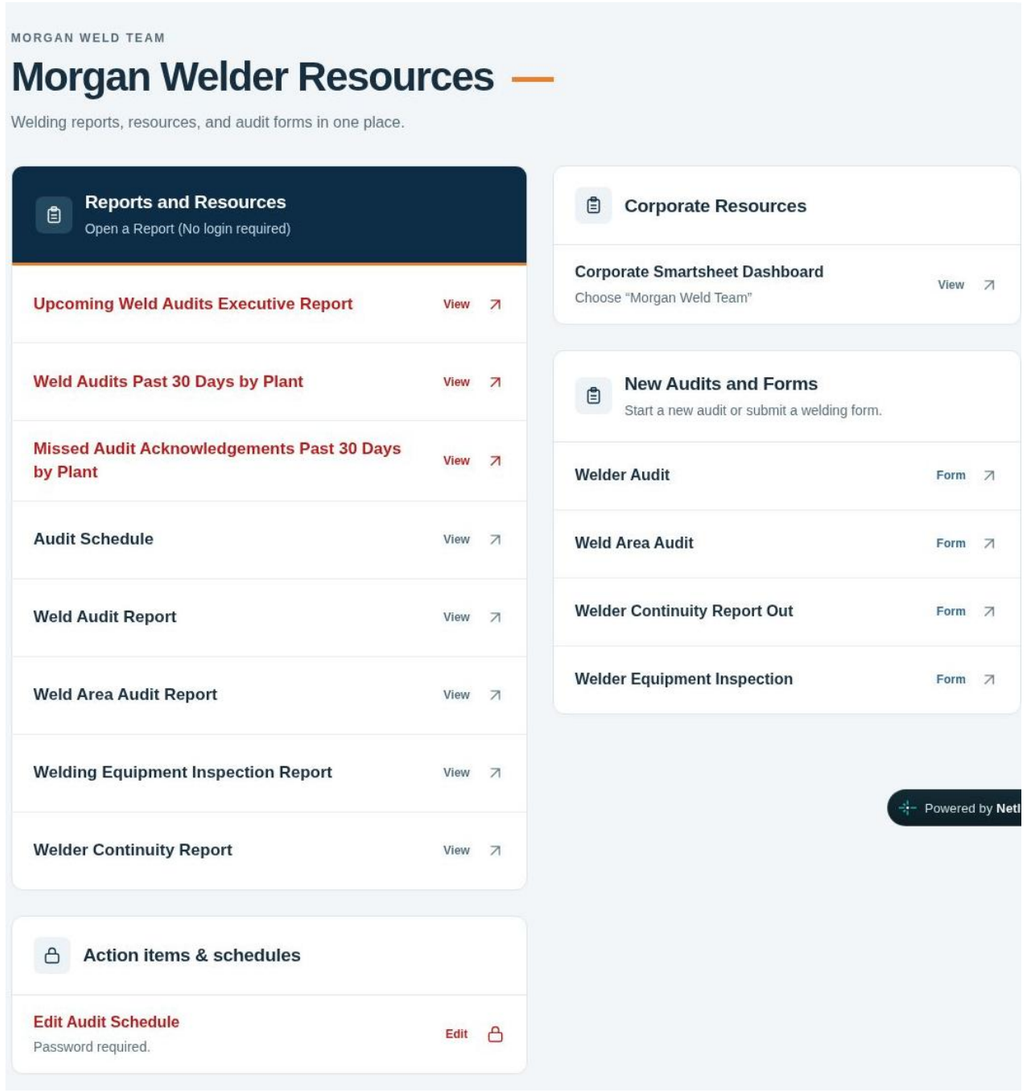
Inspection status, current condition, crane location and last update in one report.

Welding

Audit forms and reports in one workspace

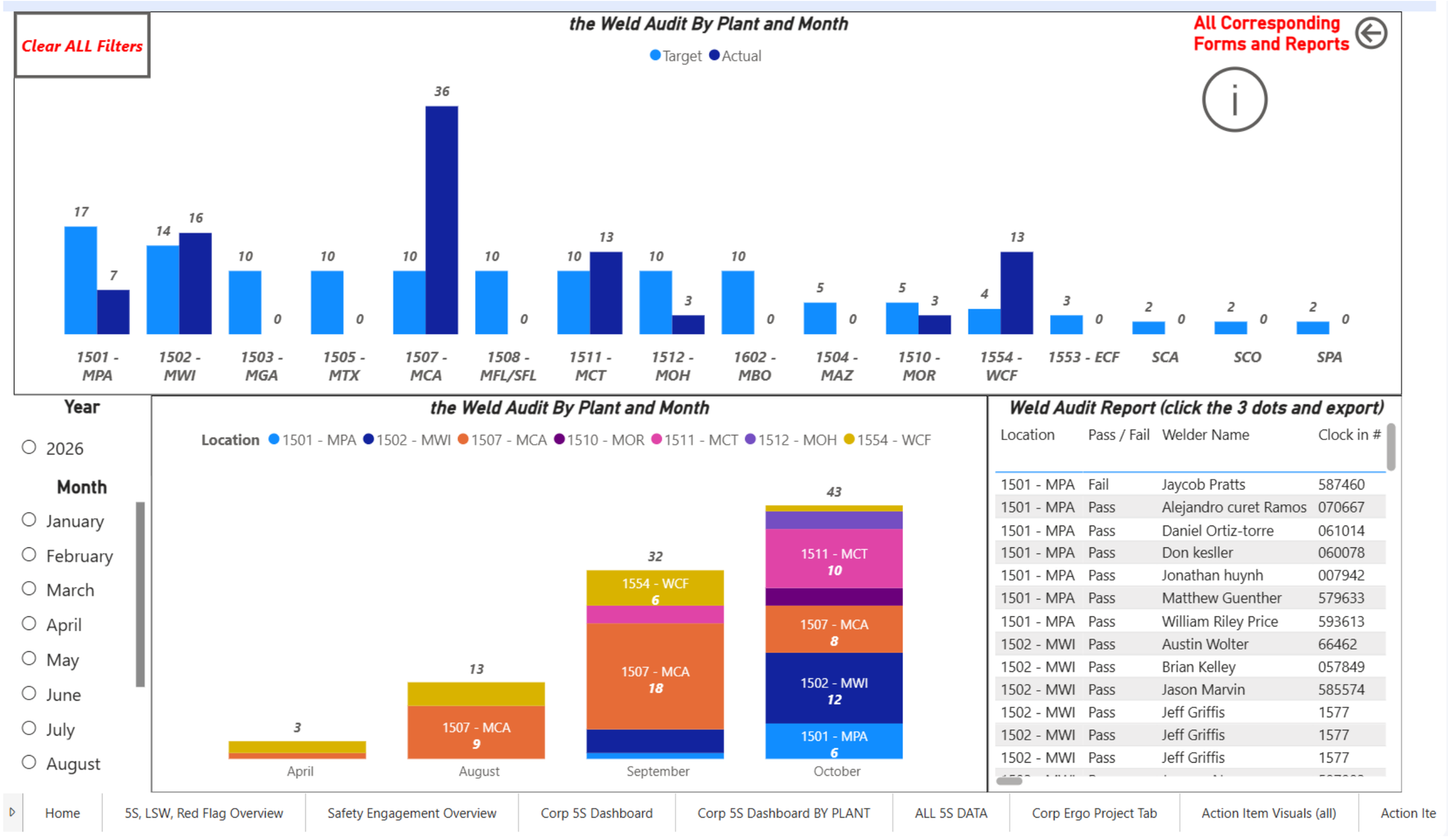
Upcoming and missed audits sit alongside continuity and equipment inspection reports.

Automated sign-offs for accountability across all plants to acknowledge misses and recover.



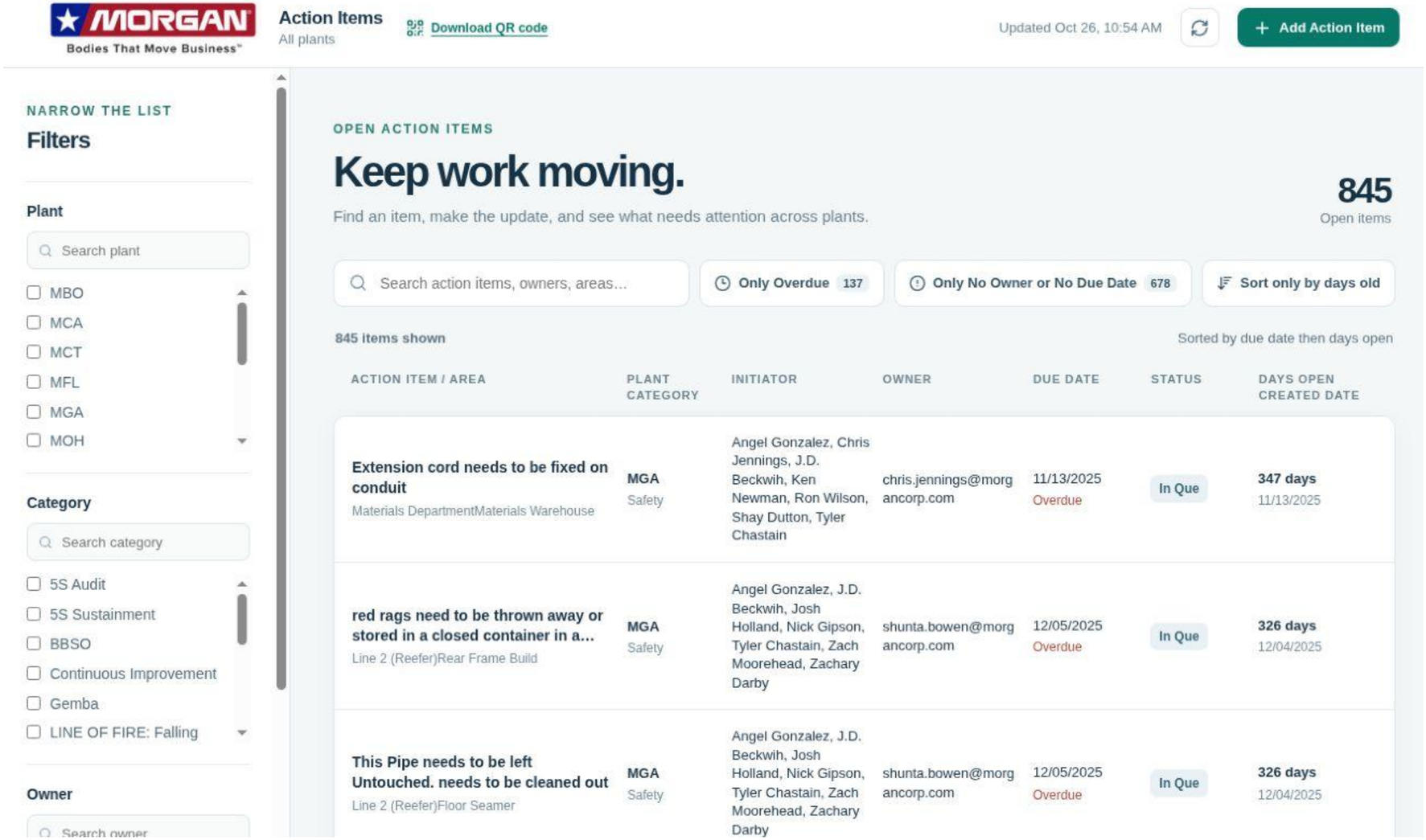
Welding

Audit forms and reports in one workspace



Open Action Items

A shared Java editor across Morgan plants**, super simple**, no login required

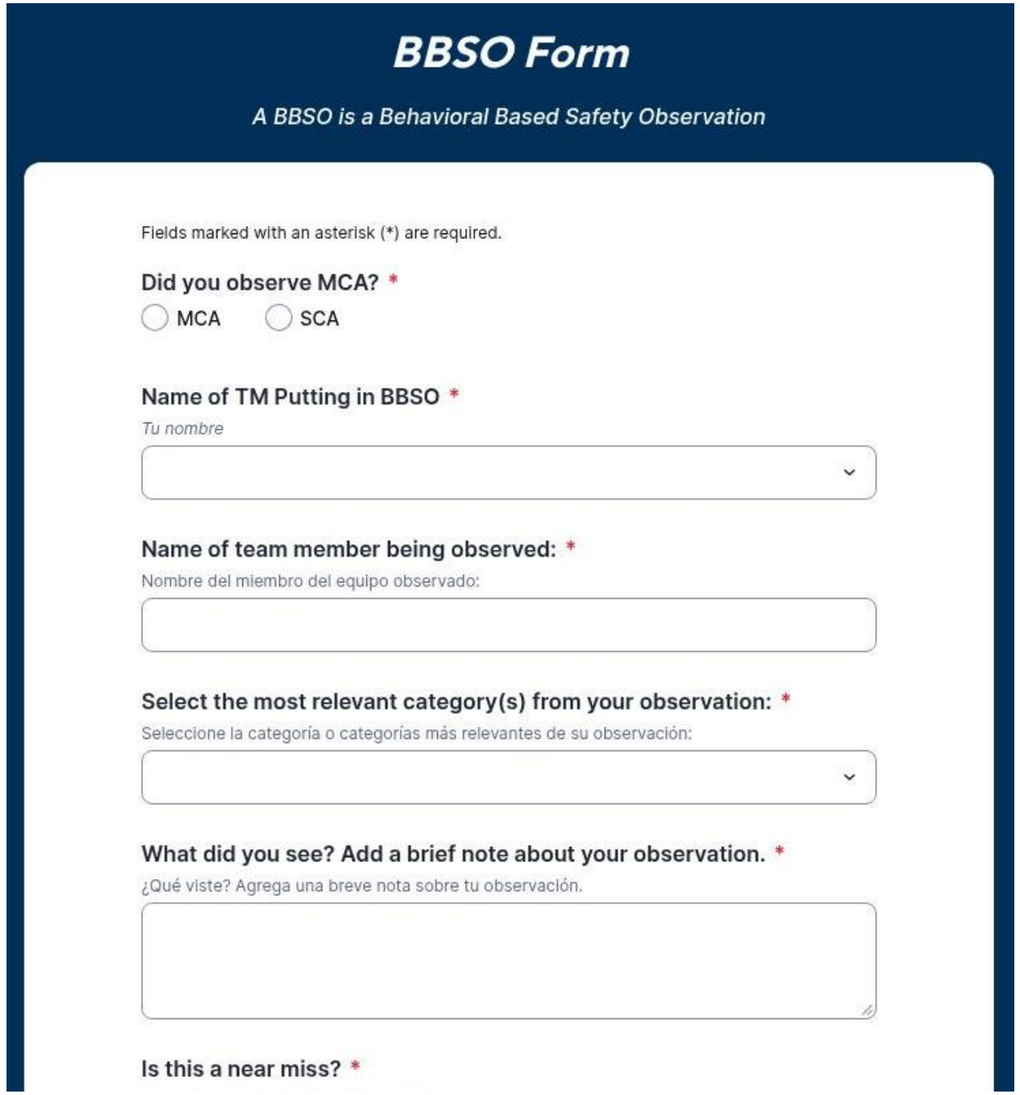


Filter by plant, category, owner or status. Update an item or add a new one.

BBSO & Safety Engagement

Behavior-based safety observations

Record the observation and current conditions. Add an action item when follow-up is needed.



BBSO Form

A BBSO is a Behavioral Based Safety Observation

Fields marked with an asterisk (*) are required.

Did you observe MCA? *

MCA SCA

Name of TM Putting in BBSO *

Tu nombre

Name of team member being observed: *

Nombre del miembro del equipo observado:

Select the most relevant category(s) from your observation: *

Seleccione la categoría o categorías más relevantes de su observación:

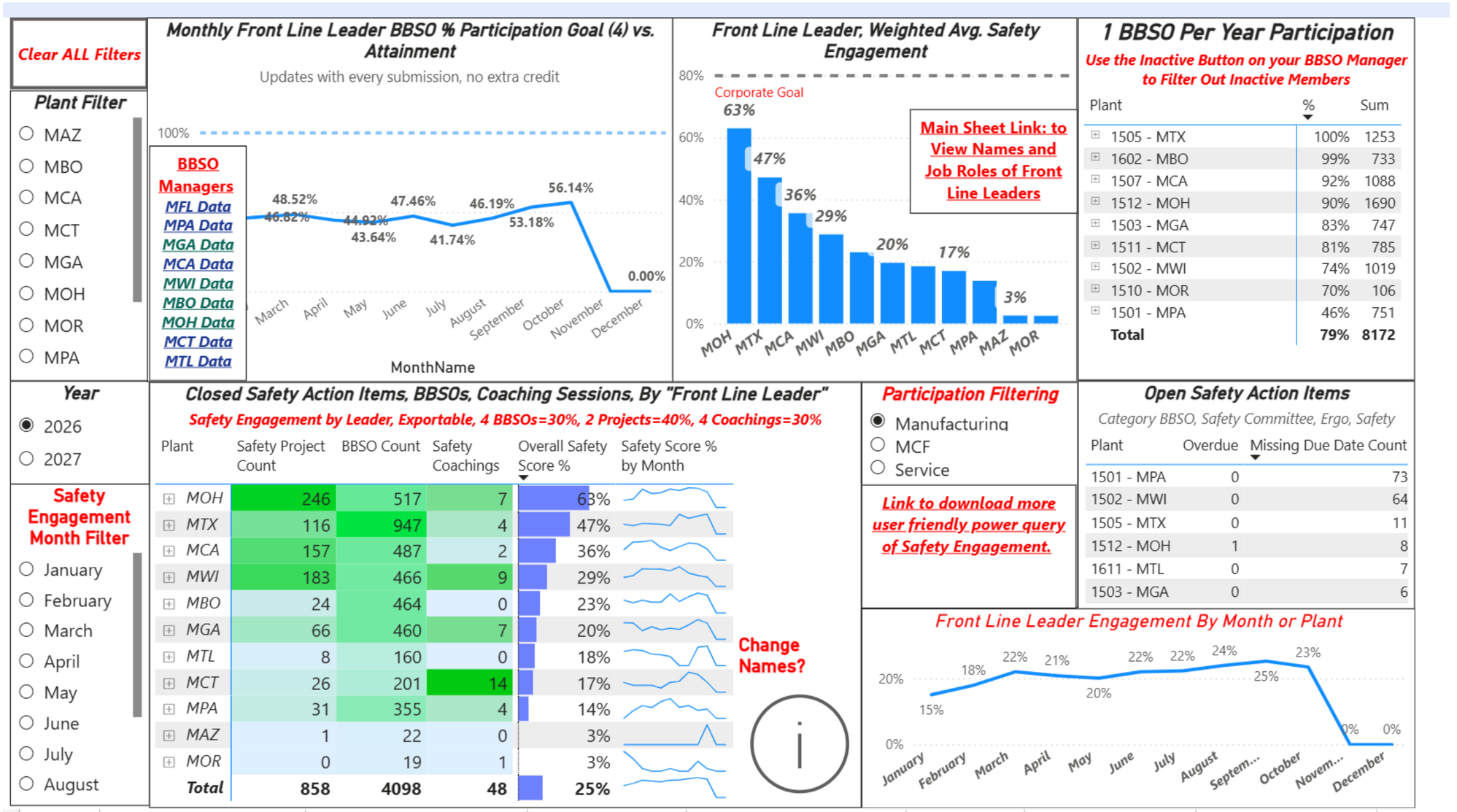
What did you see? Add a brief note about your observation. *

¿Qué viste? Agrega una breve nota sobre tu observación.

Is this a near miss? *

BBSO & Safety Engagement

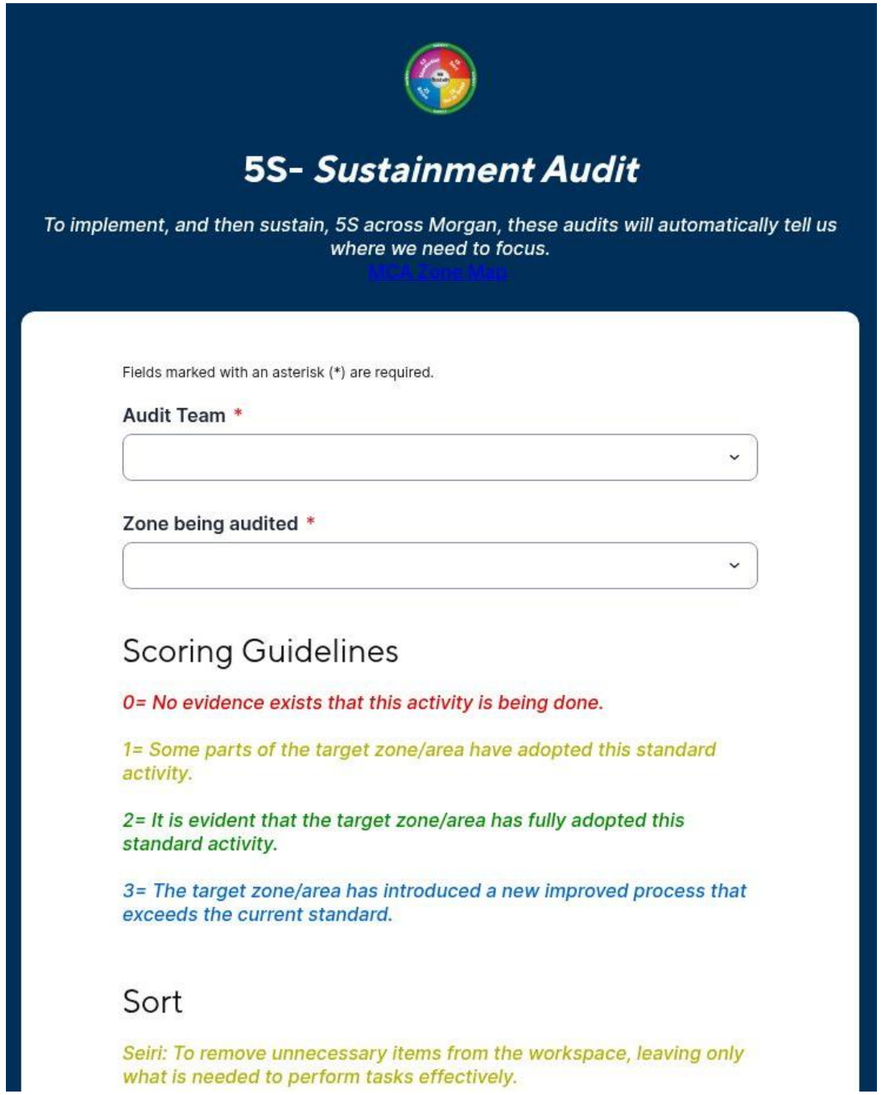
Each plant and every leader has a Front-Line Leader Score for Engagement in Safety Activities.



5S Audits

Scheduled workplace audits and sustainment

Audit teams score the zone against the 5S standard. Participation reports show completed and missed audits.



5S- *Sustainment Audit*

To implement, and then sustain, 5S across Morgan, these audits will automatically tell us where we need to focus.

MCA Zone Map

Fields marked with an asterisk (*) are required.

Audit Team *

Zone being audited *

Scoring Guidelines

0= No evidence exists that this activity is being done.

1= Some parts of the target zone/area have adopted this standard activity.

2= It is evident that the target zone/area has fully adopted this standard activity.

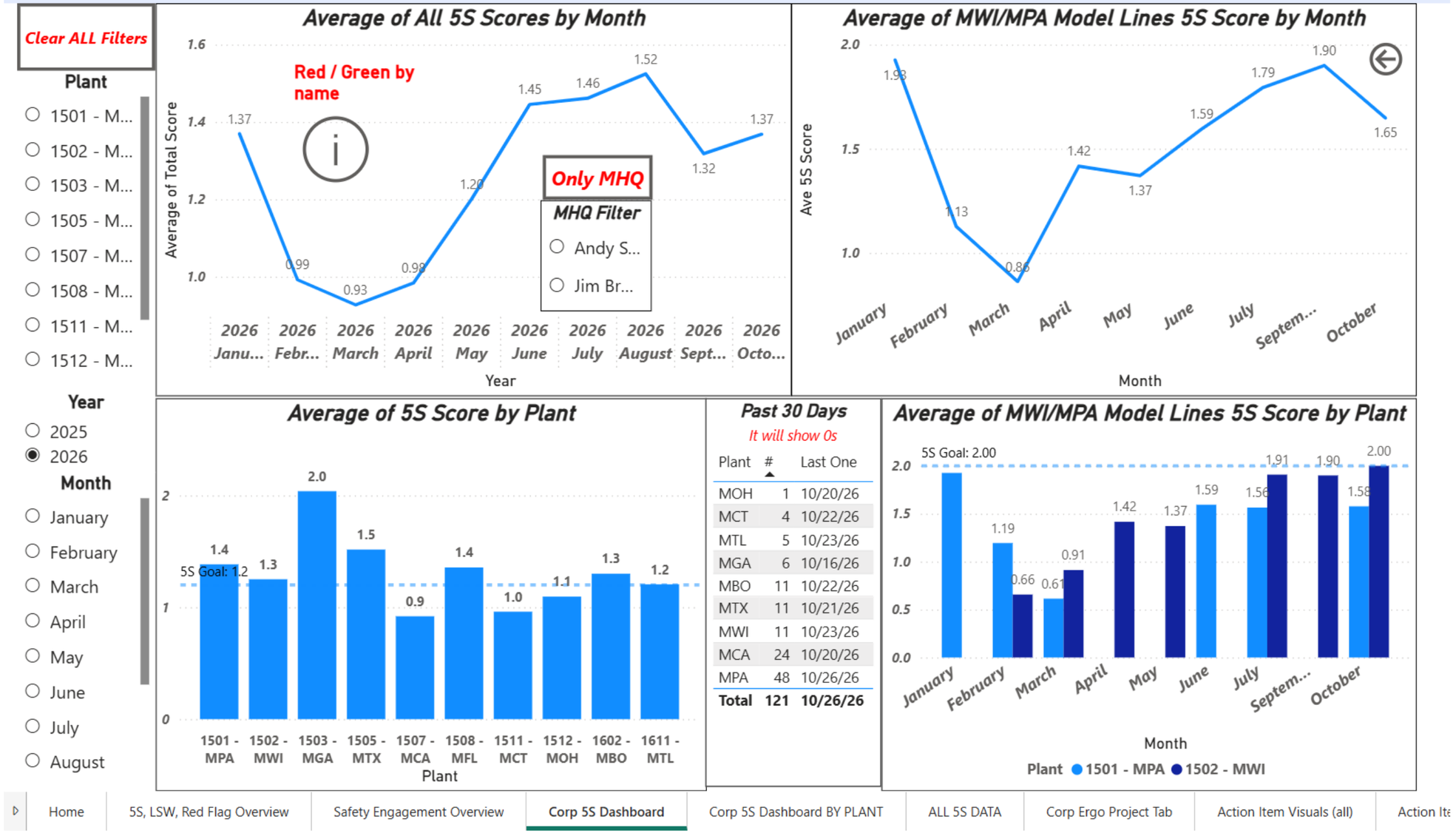
3= The target zone/area has introduced a new improved process that exceeds the current standard.

Sort

Seiri: To remove unnecessary items from the workspace, leaving only what is needed to perform tasks effectively.

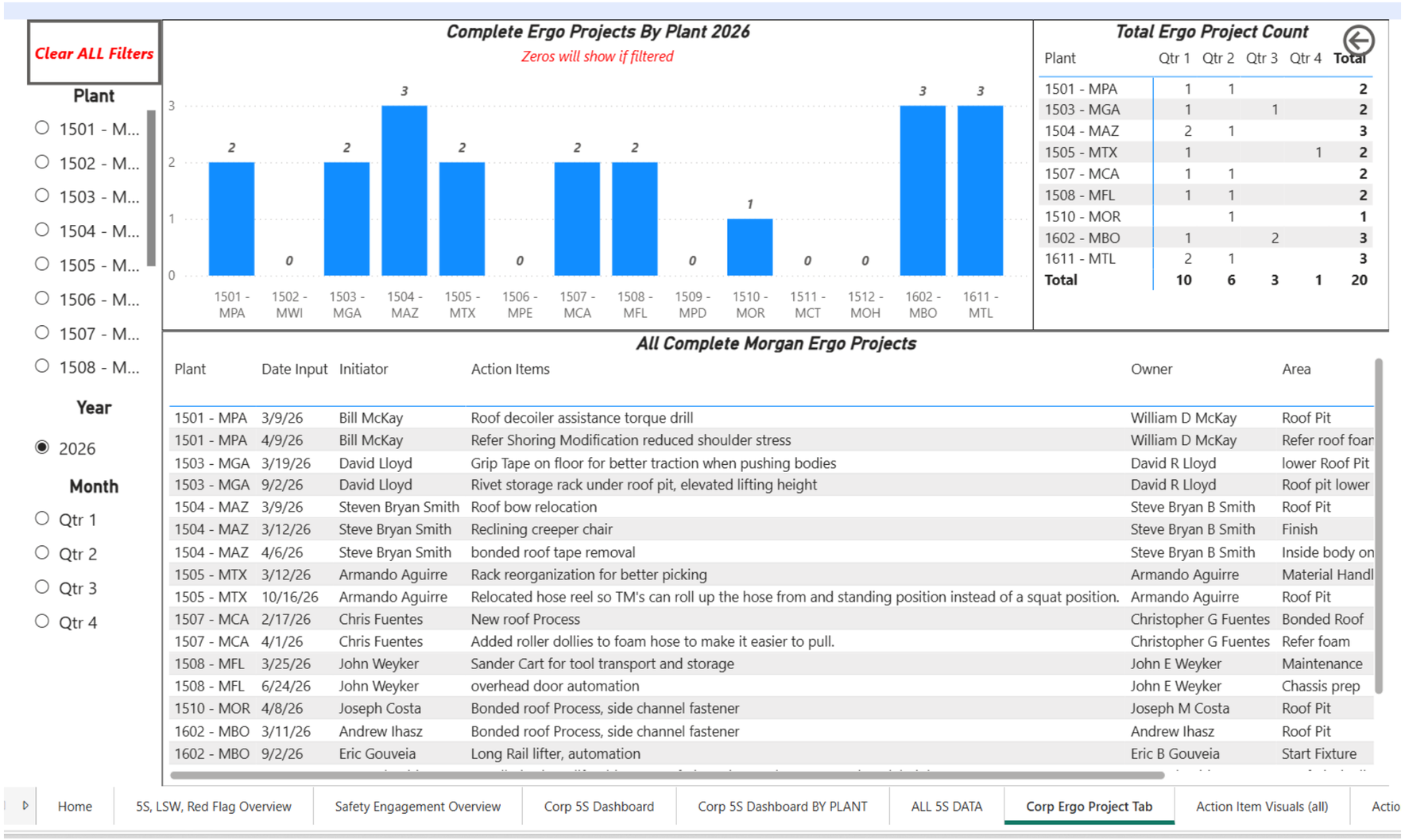
5S Audits

Scheduled workplace audits and sustainment



Ergonomic Projects

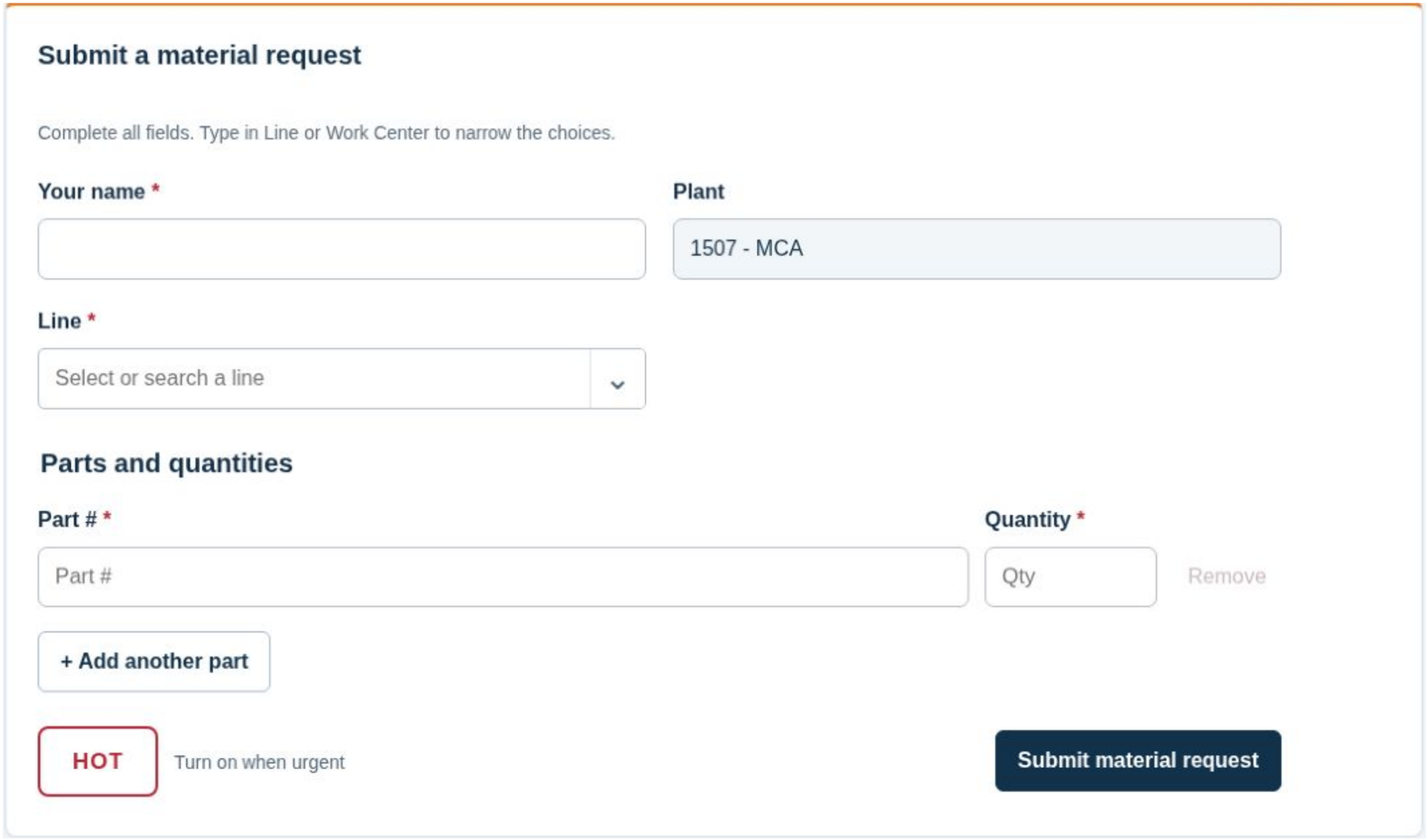
Project reporting by plant and quarter



Quarterly project counts connect to the underlying project records and risk scores.

Material Requests Java Web App

Parts requests for MCA and MGA, it literally talks, and works based on tickets, **super simple.**

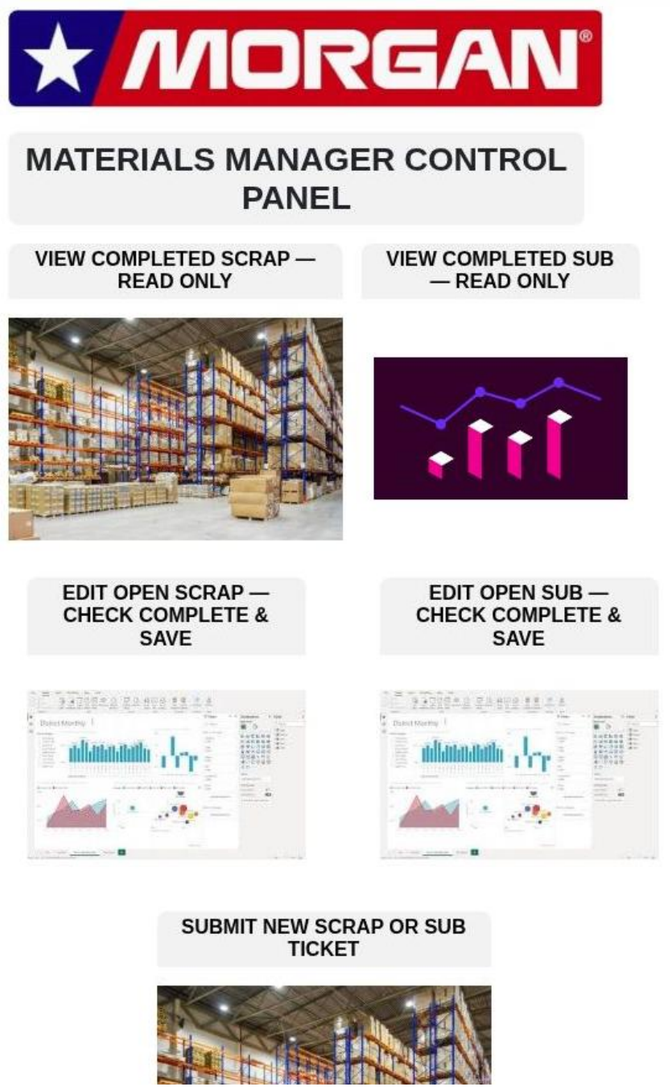


Request multiple parts, specify quantities and flag urgent needs with HOT.

10 Material Control Panels

Scrap and substitution tickets

Plant control panels link to open tickets, completed records and new submissions.



Scrap and Substitution

As you type it searches 35,000 part numbers like a google search but with descriptions and fast, **for less miscommunications.**



Part to be Scrapped

Provide the below information about the part being scrapped.

PART NUMBER - DESCRIPTION *

Quantity *

#

Scrap Reason *

Reason the part is being scrapped.

Reason Code *

Select the scrap code that most closely applies.

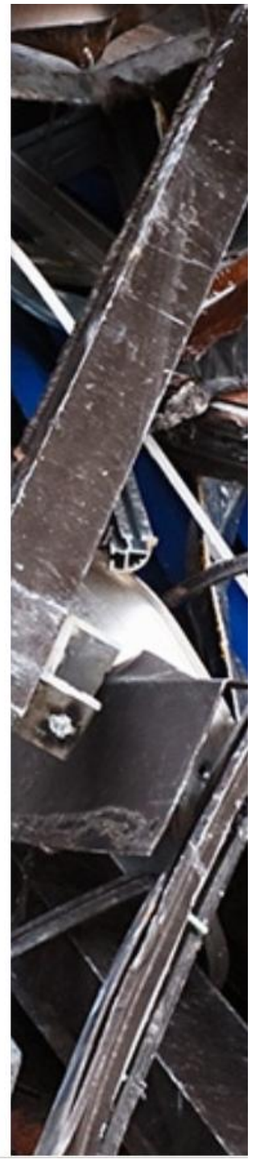
Scrap Sticker Number

Record scrap sticker number here. If multiple parts are being scrapped, place the sticker on the first part and hand write the sticker number on the remaining parts.

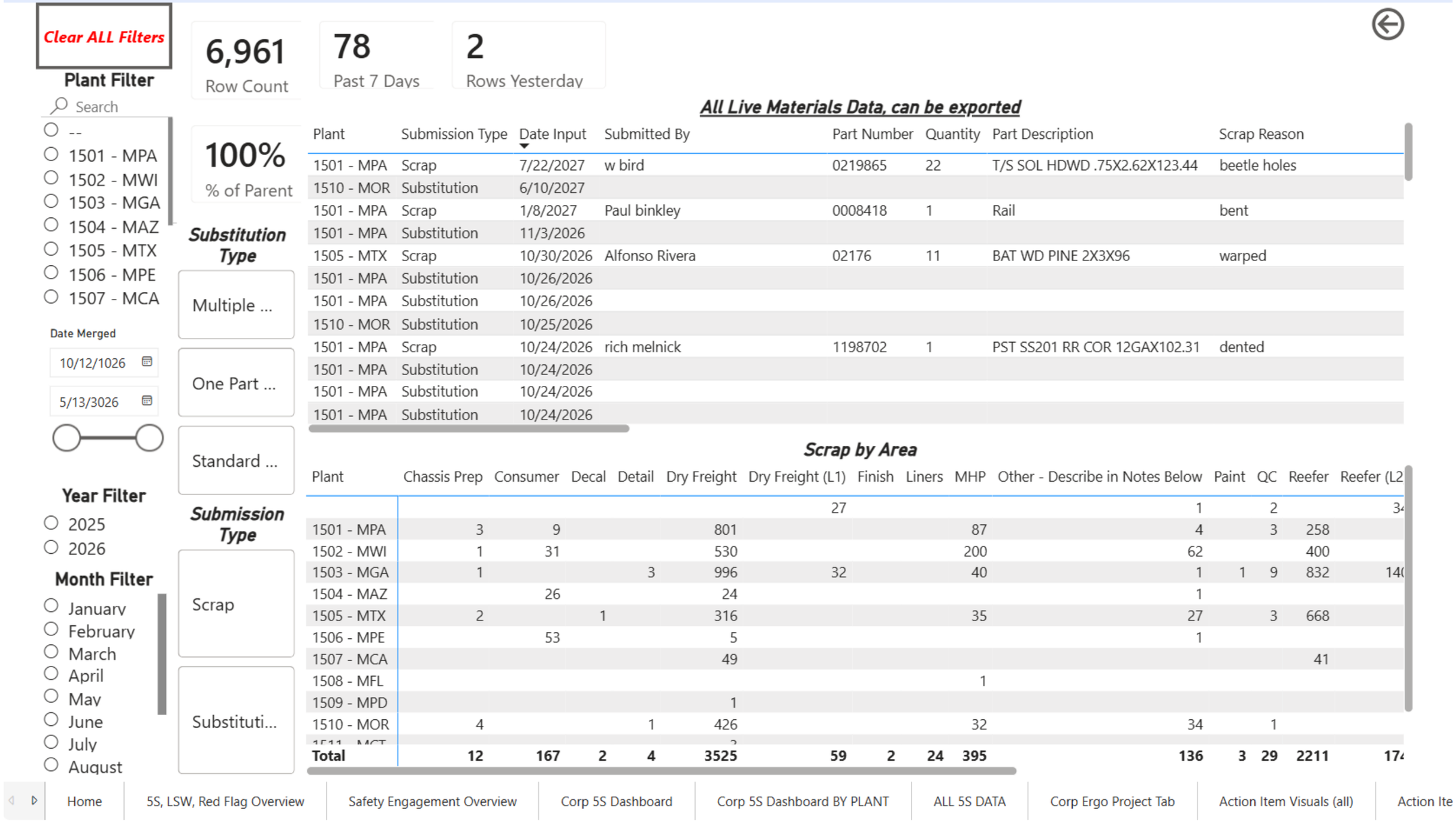
#

File upload

Picture of Scrapped Part

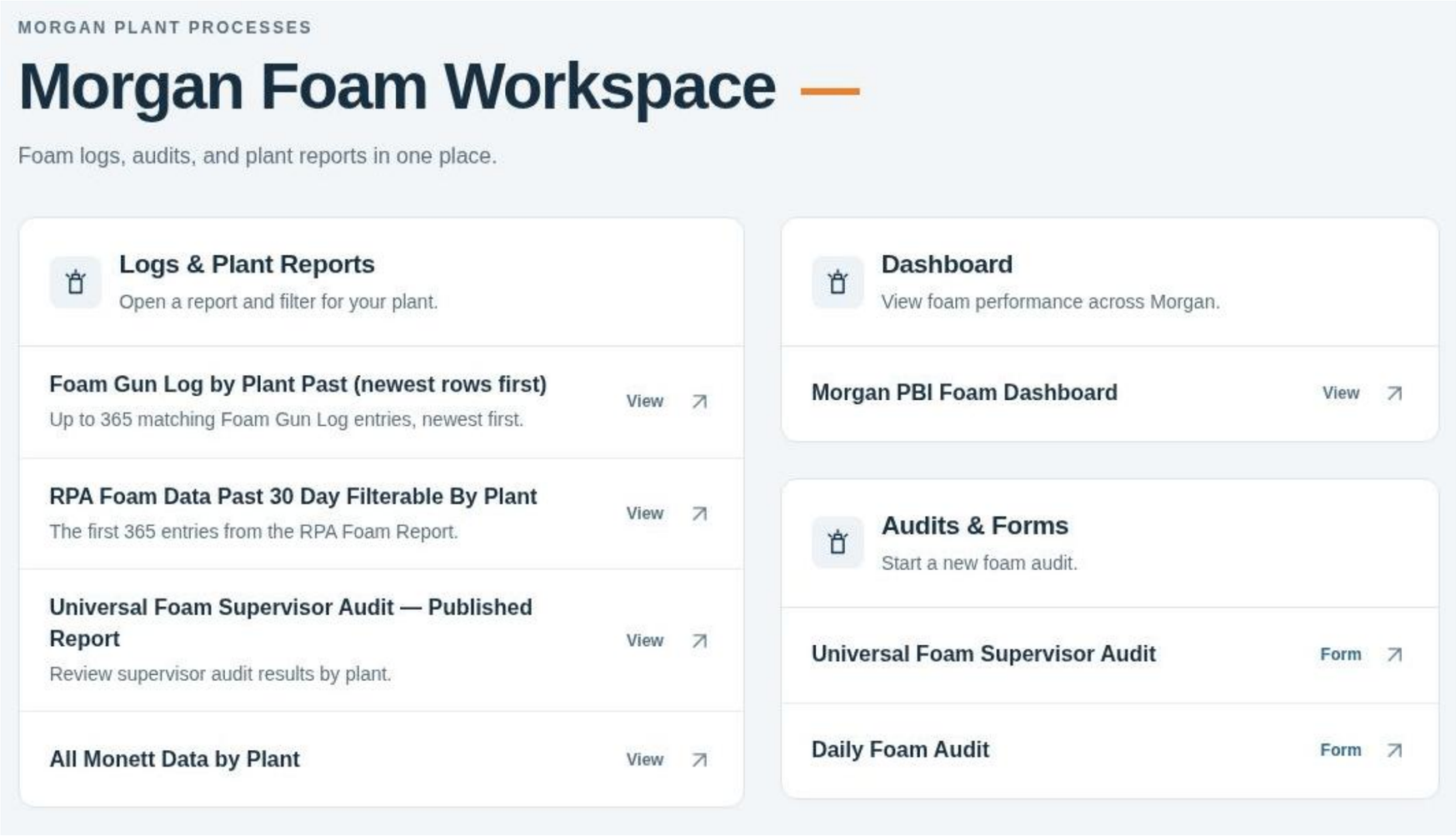


Scrap and Substitution Power BI, Exportable



Foam Tracking

Foam logs, audits and plant reports

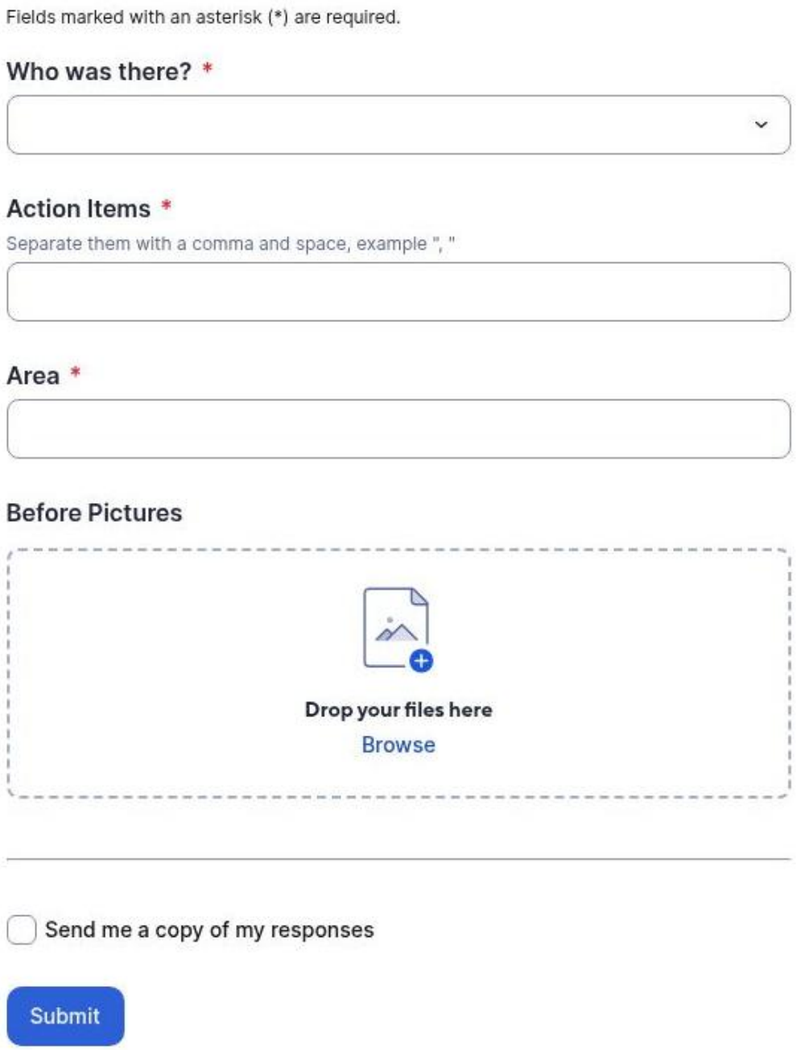


Foam Gun Log, RPA data and supervisor audits are available from the same workspace.

Gemba Walks

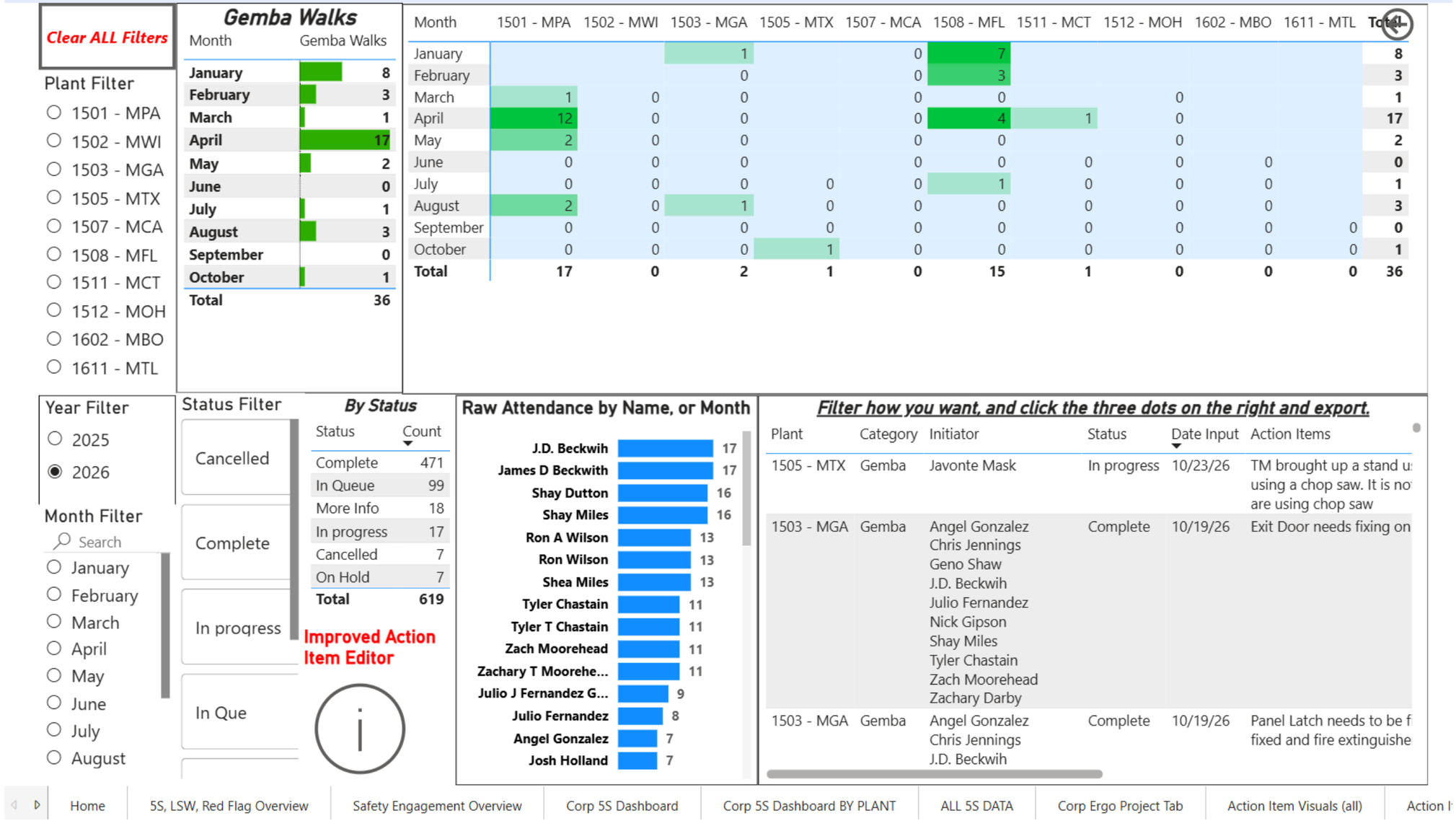
Observations from the shop floor

Record the area, participants and action items. Attach before pictures directly to the walk.



Gemba Walks (new)

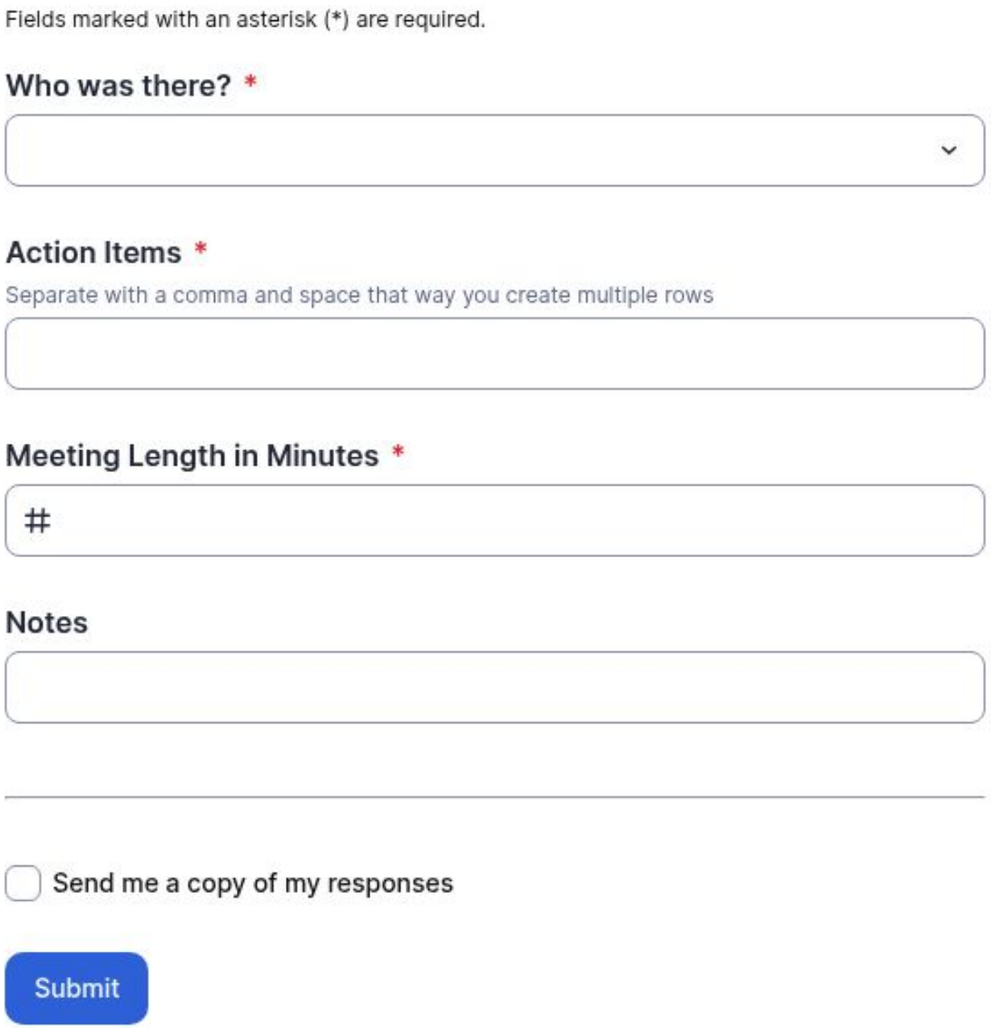
Observations from the shop floor



Safety Committee (new)

Meeting records and follow-up actions

Capture attendance, meeting length and action items in a single submission.



Safety Committee

Meeting records and follow-up actions

