

CAPA and 8D Tracker

How-to guide: what the workbook does, how to use it and what every number means.

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CAPA and 8D Tracker

Track every corrective and preventive action through the 8D disciplines, see what is overdue and stuck, and measure whether closed CAPAs actually worked.

For: Quality managers, quality and supplier quality engineers, and CAPA owners in plants that answer to ISO 9001, IATF 16949 or ISO 13485.

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Quick start

1. On Setup, set the status date, your on-time and effectiveness targets, and replace the example priorities (with your containment and closure windows), sources and owners.
2. On CAPA Log, add one row per CAPA: number, opened date, source, type, priority, product, problem statement and owner.
3. As the CAPA moves, type the date each discipline was reached (D3 contained to D8 closed); the stage, due date and status follow.
4. After closure, record the effectiveness check (Effective, Not effective or Pending) and the date it was verified.
5. Open the Dashboard; filter by source or owner for a review meeting. Update the status date on Setup each time you review.

What is in the workbook

Start Here	Read this first: what the workbook does and how to use it.
Setup	Status date, targets, and the priority, source and owner lists that feed the CAPA Log.
CAPA Log	One row per CAPA: the date each 8D discipline was reached, the stage and status, and the effectiveness check.
Dashboard	Open, overdue and stuck CAPAs, on-time closure and effectiveness, for the source and owner you choose.
Method	How every number is calculated, with assumptions, limits and sources.
Verify	Self-check: the workbook's formulas recomputed on fixed inputs against an independent reference.

What each number means

Quantity	How it is calculated	Units
Due date	Opened + close-within days for the CAPA's priority (Setup).	date

Quantity	How it is calculated	Units
Stage	The discipline after the latest date filled in: D3 Containment, D4 Root cause, D5-D6 Corrective action, D7 Prevent recurrence, D8 Close-out, or Closed.	-
Days open	Closed - opened; for an open CAPA, status date - opened.	days
Contained on time	Yes when contained - opened <= the priority's containment window; No when later, or still not contained past the window.	Yes/No
Status	Complete when closed; Overdue when due < status date; Due soon when due - status date <= the warning days; else In progress.	-
On time	For closed CAPAs: Yes when closed <= due date.	Yes/No
Open CAPAs	Rows opened on or before the status date with no closed date.	CAPAs
Closed on time	Closed on time / closed, for CAPAs closed in the 12 months to the status date.	%
Effective at verification	Effective / (effective + not effective), for checks verified in the 12 months. Pending results are left out of both.	%
Average days to close	Sum of days open / count, over CAPAs closed in the 12 months.	days
Contained in time	Yes / (Yes + No) of Contained on time, for CAPAs opened in the 12 months.	%
Open at month end	CAPAs opened by the month end (or status date) minus CAPAs closed by then.	CAPAs
Pareto	CAPAs opened in the 12 months per source, ranked with COUNTIF (ties keep list order). Hidden helper columns AO:AQ hold the unsorted counts and ranks.	CAPAs, %

Assumptions, limitations, sources and the self-check (the Verify sheet, which recomputes the workbook's formulas on fixed test inputs) are in the workbook. The last page shows the Dashboard with the example data for Linden Precision Moulding, a fictional business.

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Engineering estimates for planning and improvement work. Verify the results against your own process, data and standards before you rely on them.

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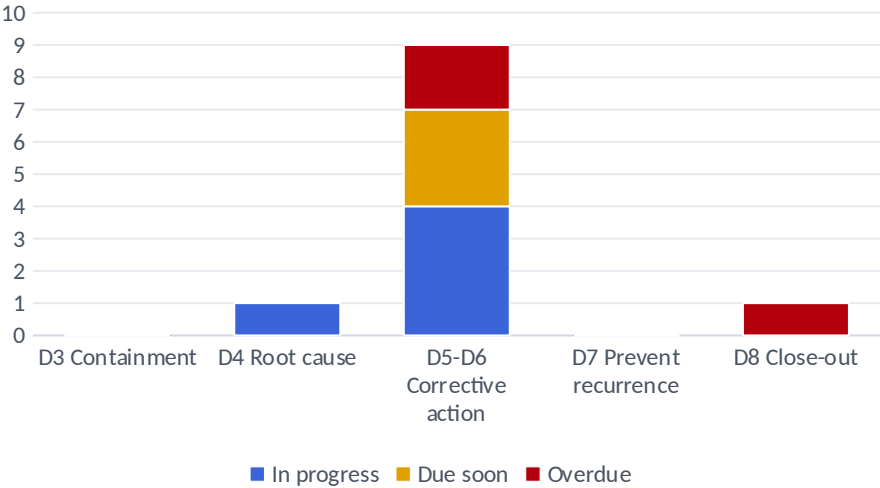
Source

Owner

Status as of 9 Oct 2026 (Setup). Rates cover the 12 months from 1 Nov 2025. Showing 44 CAPAs; leave the filters blank to include everything.

OPEN CAPAS	OVERDUE	CLOSED ON TIME (12 MONTHS)	EFFECTIVE AT VERIFICATION (12 MONTHS)
11	3	76%	80%
Opened and not yet closed	Target 0	Target 85%	Target 90%
	Above target	Below target	Below target

Open CAPAs by 8D stage



Opened, closed and open backlog by month

