Suggestion & Problem logging Facility

User Guide

Overview

We have developed an inhouse system to help track, monitor & report against:

- suggestions for improvements
- problems encountered

The intention is that it should be easy for all to contribute to improving / developing the business generally and that we can collectively have a single place where all details of this nature are managed. Essentially, if it is not in here, it should not be occupying our time. Conversely, if it is in here, it should get the time it deserves.

Sections In This Guide

1. How to access the "problem report"
2. Steps to log the "problem report"
3. Follow up once the "problem / suggestion" is logged

1. How access the "problem report"

We have deployed standard out of the box Windchill functionality to facilitate our needs. This will give everyone who uses this tool some experience of using Windchill and be able to have an opinion on the system generally. It is a web based system and can be accessed through this link:

http://hocsrv07.honey.local/Windchill/app/#ptc1/tcomp/infoPage?ContainerOid=OR%3Awt.inf.library.WTLibrary%3A83049&oid=OR%3Awt.folder.SubFolder%3A454200&u8=1

Please add this to your favourites or put a shortcut on your desktop for easy access.

Once you select the link you will be asked for your username and password which is your windows login credentials. The system is integrated with our ldap system so all users are managed in that way.
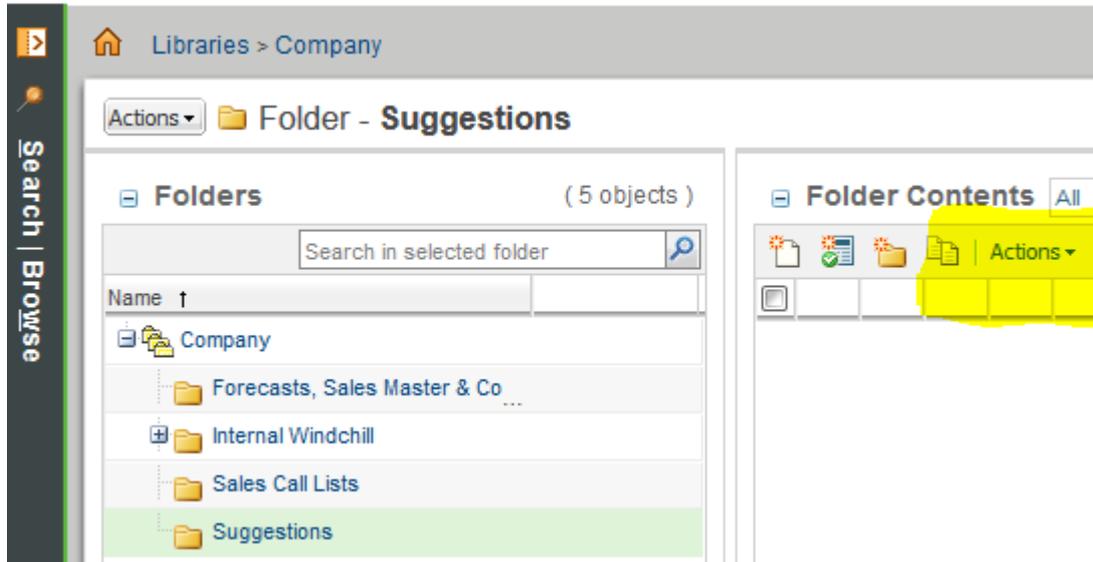
Once you select the link and enter your password, you should be presented with this screen.
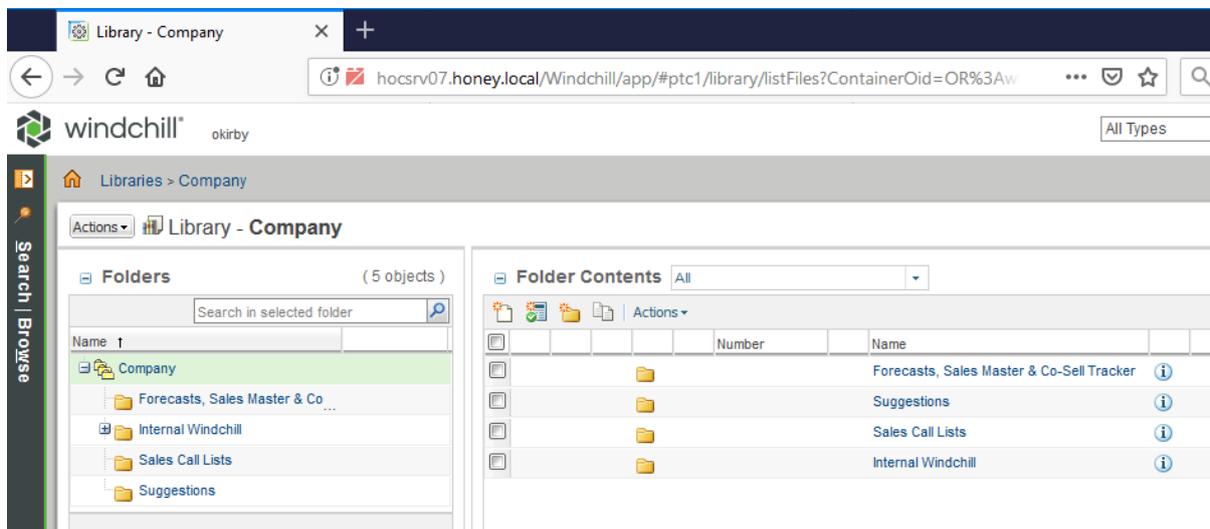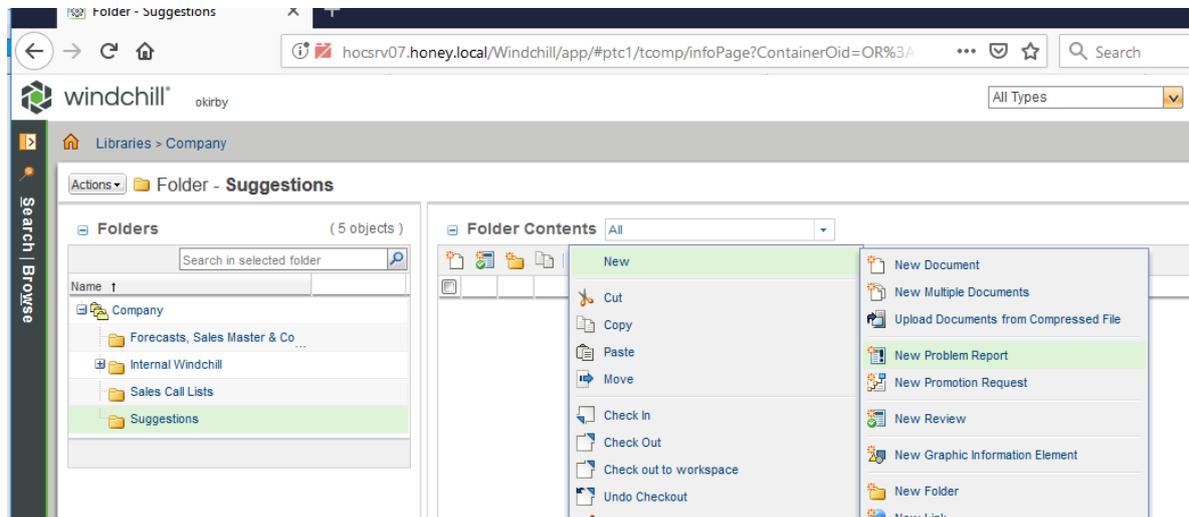
2. How to log a "problem report"

"Problem Report" is a standard out of the box Windchill function and we have configured it so that the wizard collects and segregates the information as we want to see it. To initiate the wizard choose:
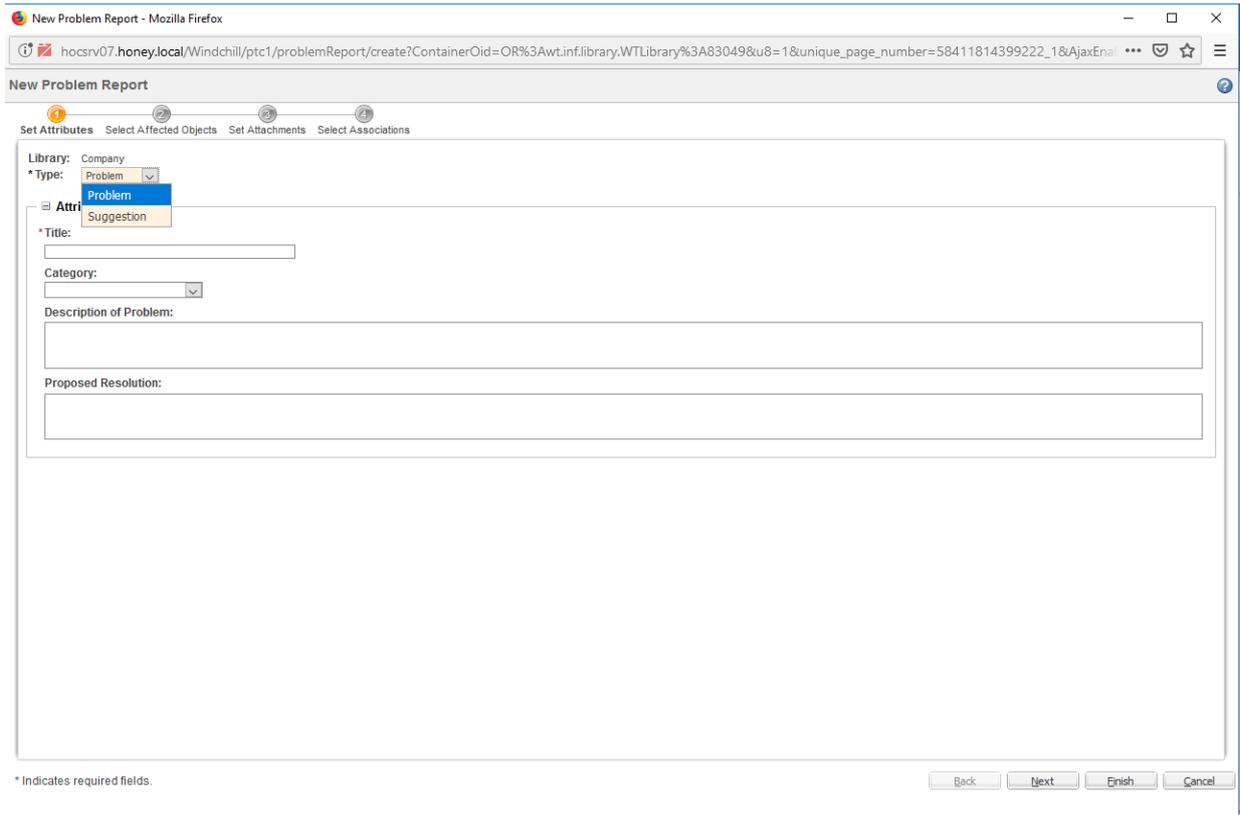
Actions

Follow the drop down to **New Problem Report**

This will open the Suggestion / Problem reporting wizard.

This wizard collects all we need to know for either:

- Problem – An incident that has occurred that you feel needs reporting and some lessons learned / preventative measures put in place to avoid repeat instances.
- Suggestion – A proactive idea or innovation that you think would benefit the company, your department, manager, colleague, customer or yourself.

Once you select "Type" enter a title (name) for the incident. This can be anything so try to be descriptive.

The category field is predefined to help us manage the incidents and at the moment we have the following categories:
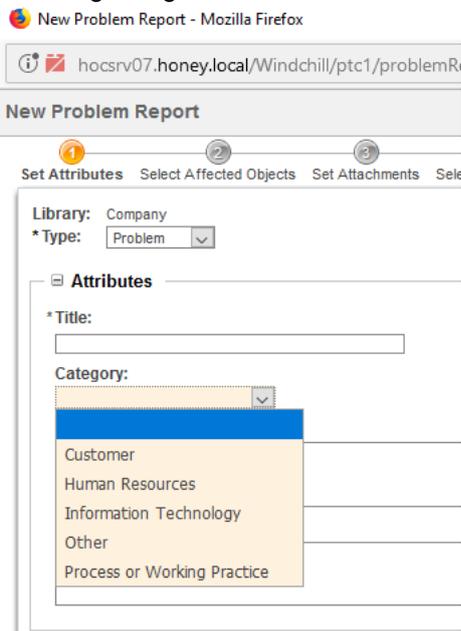
Select the category that best describes your problem / suggestion.

Then fill out the remaining two fields to give a description of the problem / suggestion and in turn some proposed resolution / way forward if you have one.

There are some options to attached supporting document which we are not using for now, so once you have the first page on the wizard complete hit the Finish button to submit your incident.

3. <u>Follow up once problem / suggestion is logged</u>

We will review the frequency and volume of incidents reported but as a minimum, all new incidents reported in a given month will be reviewed at the following months management meeting.

Once we have a working list, various actions and activities will be delegated out accordingly.

4. <u>appendix</u>

For those familiar with the Windchill system the Suggestion folder is in the Company Library and can be accessed here.