



***PHRED* 8D Shared Problem Solving Methodology**

Supplier Version

User Guide
Version 1.8

This user guide is formatted to be read in book form. Pictures and diagrams will appear on the left hand pages, while the information describing them will appear on the right hand pages.

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The information contained in this document represents the current view of PHRED Solutions on the issues discussed as of the date of publication. Because PHRED must respond to changing market conditions, it should not be interpreted to be a commitment on the part of PHRED, and PHRED cannot guarantee the accuracy of any information presented after the date of publication.

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Customer Information and Technical Support

Product Upgrades

Users of PHRED 8D Problem Solving Software will receive notice of upgrades. Upgrades correct reported problems and include product enhancements. You will receive free upgrades during the guarantee period, normally one year after installation.

How to Contact Us for Technical Support

If you have a problem, contact PHRED technical support via telephone, e-mail, or fax.

What We Need to Know

To assist the technical support person, please provide the following information:

- Your name, telephone number, and/or e-mail address
- Company name
- A complete description of the problem, including the steps you followed prior to the problem occurring and any error messages you received.

Telephone

To use the telephone to contact us, follow these steps:

- Gather the information as instructed in the **What We Need to Know** section above.
- Make sure your computer is in reach, and the PHRED software is installed and running.
- Call PHRED Technical Support Monday through Friday between the hours of 9am and 5pm Mountain Standard Time at (970) 453-5235.

E-mail

Contact us through e-mail for your non-emergency questions. This helps to eliminate problems associated with time differences. To use e-mail to contact us, follow these steps:

- Gather the information as instructed in the **What We Need to Know** section above.
- Send your questions to: laurie@phredsolutions.com

8D PROBLEM SOLVING

PHRED8D Shared

User: Chris Topher
QC >> State Problem >> Problem Identification

Home
Problem Identification
8D
Library
Reports
Charts

[Browser Setup](#)

Login

E-Mail Address:

Password:

If you are *NOT* registered, click the 'Register' button.

[Forgot your password?](#)

Use PHRED to go beyond simple problem tracking to find root cause and prevent re-occurrence.

PHRED uses a **Structured Problem Solving Methodology** which integrates the concepts and procedures that comprise the basis for a formal approach to the isolation and control of conditions which generate undesirable symptoms in the work place.

The system has two different problem investigation modes, [Problem Identification \(ID\)](#) and [8D](#). ID enables the user to quickly create a permanent record of the incident. 8D creates a fast path through the process for less complex problems.

PHRED builds up a library of all problems. Users can easily answer the question, "Has this happened before?" If so, what did we or our suppliers/customers do about it? Who was involved?

Most problem solving is social. People solve problems together. PHRED is used as social middleware, a common neutral place to record and share the facts and supporting data about a problem.

When working through PHRED, look for the following links that can help:

- Coach:** On line coaching for each screen helps you work the system
- Experts:** Accesses the help and expert chains
- Help:** Guides users navigating the system

Want expert help? Contact PHRED Solutions at 970-453-5235.

For more in-depth help with PHRED 8D Problem Solving, see our Users Guide.

Browser Setup

For proper system performance, you must setup your browser correctly.

Click on **Browser Setup** above for information about correct browser setup.

Please enter the following information in order to setup this Registration.

* Indicates required field.

* E-mail:

* Password:

* Verify Password:

* First Name:

Middle Name:

* Last Name:

* Company Name:

Country & Time Zone:

Job Role:

Phone Number:

* Host Sponsor:

* Host Sponsor's Email:

There are many additional parameters that you may want to set after you have initially registered. Once you have reached the Library screen, you can go to the Preferences screen and change/set these values.

Chapter 1 - Getting Started

User Registration

Registration on the shared system is only intended for users who do not have a private system (i.e. certain suppliers that have limited access to the shared system only).

From the Login screen, click Register. This will take you to the Registration screen where you will need to fill out the form. The Host Sponsor is the person from the Host company who gave you permission to register in this system. You must also enter the Host Sponsor's email address.

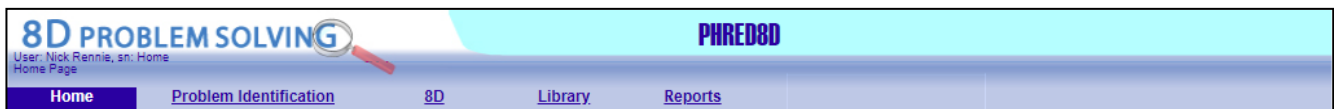
Once this form is completed, click 'Save/Next'. You will then be taken to a review screen. Click 'Accept Preferences' and your registration information will be sent to the Host for approval. Once approved, you will receive an email telling you that you can login.

Login

Please enter your email address and password to log into the supplier shared system.

If at any time you forget your password, please retrieve your password from the [Forgot your password?](#) link on the login page. You can then enter your e-mail address then your password will be sent to the e-mail account you registered.

It is advisable to read the **Browser Setup** information in this guide prior to using PHRED. Specific browser settings must be set up prior to using the software for it to function properly.



Main Function Tabs

The following options are located at the top of each screen. The function you are currently working on will show a tab. In the example below, the user is on the Home page. Note: The Admin tab is not visible to all users.

Home

Home moves you to the Home page, where you will see a list of your problems. The Homepage is the default Startup page when registering. For more information on the Home Page, see Chapter 2.

Problem Identification

Select the Problem Identification tab to enter a *new* Problem Identification. Problems can be quickly logged here. Actions can be assigned, and the problem can be closed, all on one screen. For more information on Problem Identifications, see Chapter 3.

8D

Select 8D to enter a *new* 8D. Most of your problems can be solved with 8D, a simple problem solving process. For more information on 8D's, see Chapter 4.

Library

Click on Library to access a complete list of all problems. Problems can be searched for by specific criteria such as keyword, status, location, Problem Owner, or date range. For more information on Library functions, see Chapter 6.

Reports

Many Reports are available, including a Problem Summary Report and various individual problem reports. For more information on Reports, see Chapter 7.

8D PROBLEM SOLVING

PHRED8D Shared

User: Chris Topher
 QC >> State Problem >> Problem Identification

Home
Problem Identification
8D
Library
Reports

[Browser Setup](#)
[Tech Support](#)
[Preferences](#)
[Log off](#)

My Problems: (SuperUser)

Click on the Column Header to sort by that column. 76 records are being displayed.

ID	Status	Start Date	Closed Date	Description	Mfg Site	Problem Owner	Location - Area Work Process
00934 ID	Closed	6/28/2011	3/22/2012	TOC Sensor constants	No Value Selected	ted Arnold	ALLN - OperationsAudit
00932 ID	Open	2/9/2011		Plugged Area sump pump in flange	EVT	LAURIE RAMBAUD	ALLN
00931 8D	Open	12/9/2010		Flange 8877 on edge strip breaks during installation of light truck doors	EVT	Jason Lineman	CHAR - Operations
00921 8D	Open	1/21/2011		Tape sun-damaged around vent area 3477BB Promoted on 1/21/2011 at 11:41 AM from PHRED8D, PID 921 8D, for PHRED 8D Customer to PHRED8DShared, PID 1330 QC by Monica Stout.	KHT2	Monica Stout	CHAR - Operations
00888 8D	Open	1/21/2011		Incomplete Shipment to customer 105-8941 Demoted on 1/21/2011 at 11:25 AM from PHRED8DShared, PID 1260 8D, to PHRED8D, PID 888 8D by Monica Stout.	EVT	Avishek Uprety	CHAR - Operations
00878 8D	Open	1/21/2011		Incomplete Shipment to customer 105-8941 Promoted on 1/21/2011 at 11:25 AM from PHRED8D, PID 878 8D, for PHRED 8D Customer to PHRED8DShared, PID 1260 QC by Monica Stout.	EVT	Monica Stout	CHAR - Operations
00877 8D	Open	1/21/2011		ball valve number B1271 does not work properly, valve leaks water when it should not Promoted on 1/21/2011 at 11:11 AM from PHRED8D, PID 877 8D, for PHRED 8D Customer to PHRED8DShared, PID 1250 QC by Monica Stout.	EVT	Monica Stout	IND - Operations
00866 8D	Open	12/9/2010		Material Quality of Sheet Metal is below standard Demoted on 1/21/2011 at 11:05 AM from PHRED8DShared, PID 1230 8D, to PHRED8D, PID 866 8D by Monica Stout.	EVT	Avishek Uprety	BNG - Operations Assembly
00836 8D	Open	1/20/2011		too few root causes	No Value Selected	Monica Stout	CLEV - Operations

Total of My Open Problems: 63, 88.7%, Total of My Closed Problems: 8, 11.3 %

Chapter 2 – Database of Existing Problems

Home Page (My Problems)

The Home page is a good place to see what you, as an individual, are working on at a glance. All problems that you have a role in (i.e., problems where you are listed as a Problem Owner or Team Member) appear in this list on the Home page.

You will see a total for both Opened and Closed problems, as well as the percentage of total problems, for each status type.

You can sort by any column by clicking on the **column header**. If you click the header once, the column will be sorted from A to Z. If you click the header a second time, the column will be sorted from Z to A.

Select an ID number (Identification number) to access a problem. You will either go to the Problem Identification screen or the last screen visited in that problem, depending on your User Preferences.

If the Problem ID has the initials “ID” next to it, the problem is a Problem Identification; if there is an “8D” next to it, the problem is an 8D.

To begin a *new* Problem Identification or 8D, select the respective tab at the top of the screen.

8D PROBLEM SOLVING

PHRED8D Shared

User: Chris Topher
QC >> State Problem >> Problem Identification

Home
Problem Identification
8D
Library
Reports

Supplier Shared 8D
Browser Setup
Tech Support
Preferences
Log off

Reminders
 Help
 Coach
 Experts
 Where Am I?

In this case, the user only wants problems that happened in Charlotte, Operations and Receiving.

Keyword:
 Whole Word

Search Scope: Both ID Number Only

Search Scope List:

- All Areas
- Actions
- Notes - Mtg Minutes
- Possible & Root Causes

Problem Identifications
 8D's
 Records Per Page:

Location:
 Host Owner:
 Mfg Site:

Area:
 Other Owner:
 Share with:

Work Process:

Status: Open Closed
 Search Date: Start Date Closed Date
 From Date: {m/d/yyyy}
 To Date: { Blank = All }

Click on the Column Header to sort by that column. 3 records meet the search criteria.

ID	Status	Start Date	Closed Date	Title	Mfg Site	Problem Owner	Location - Area Work Process
00931 8D	Open	12/9/2010		Flange 8877 on edge strip breaks during installation of light truck doors	EVT	Jason Lineman	CHAR - Operations
00921 8D	Open	1/21/2011		Tape sun-damaged around vent area 3477BB Promoted on 1/21/2011 at 11:41 AM from PHRED8D, PID 921 8D, for PHRED 8D Customer to PHRED8DShared, PID 1330 QC by Monica Stout.	KHT2	Monica Stout	CHAR - Operations
00878 8D	Open	1/21/2011		Incomplete Shipment to customer 105-8941 Promoted on 1/21/2011 at 11:25 AM from PHRED8D, PID 878 8D, for PHRED 8D Customer to PHRED8DShared, PID 1260 QC by Monica Stout.	EVT	Monica Stout	CHAR - Operations

Has This Problem Happened Before?

Have other individuals or groups encountered the same or similar problem? How was that problem resolved? What was done, why, and how?

The **Library & Reports** screens allow you to search for problems by keyword. By clicking on the Problem ID number (ID), you can view the whole of an individual problem. You may find that another group has tackled the same or similar problem as yours, making the problem solving process faster and easier for you. The PHRED database of experience becomes a very valuable resource.

You may search all problems in the database, or enter a **Keyword** and press **Search** to narrow down the results. The existing problems are listed in the table in the lower half of the screen. Click on a Problem ID to view the report. The report appears in a pop-up window.

See Appendix 1 for examples of Reports that can be run.

PHRED8DShared

User: Ann Lim
Problem Identification

Home
Problem Identification
8D
Library
Reports

[Browser Setup](#)
[Tech Support](#)
[Preferences](#)
[Log off](#)

PID: 1550 ID
Status: Open

Title: flange 8877 won't stay in place

Close Problem
 Convert PI to 8D

* Indicates required field

* Title (D2): flange 8877 won't stay in place

* Location: Allentown
 Host Owner: Stout, Monica
 Mfg Site: KkJ

Area: Maintenance
 Supplier Owner: Lim, Ann SupplierB
 Shr With: SupplierB

Occurrence: Date: 05/09/2015 Time: 3:26 PM Time Zone: U.S. EST GMT -5

Initiated By: Ann Lim, SupplierB Date: 05/04/2015
 Last Updated By: Ann Lim Date: 5/4/2015

Team Members: Ann Lim, and Monica Stout

Enter Tracking Data information below: (D2)

Tracking Data System: SupplierB (41)

Product Name: Flange 8877
 Product Number: 8877
 Product Line: Diode

Date Ordered: 05/05/2015
 Production Date: 04/15/2015
 Shipment Date: 05/06/2015

Due Date: 05/19/2015

Send Supplier Email To:
 Supplier Only
 All Team Members
 Send Supplier Email
 CC Sender

ID.	Action Description Responsible {PID 1550 ID Team Members only} Completion Comments (Validation / Verification)	Due Date Status Last Updated By	Completion Date Type	Send Email	Delete Sub-Type
1.	check that spec is correct Lim, Ann : SupplierB : manf mgr	5/19/2015 Open	Containment Design Change	<input checked="" type="checkbox"/> Send Email	<input type="checkbox"/> Delete

Note: You must select a Responsible person to enable the Send Email checkbox.

Attachments

History

Minutes

Notes

Reminders

Report

Revisions

Team

Help

Coach

Experts

Chapter 3 – Problem Identification

All Problems now begin with a Problem Identification screen.

The purpose of the Problem Identification screen is to identify and categorize a problem. Not to describe it fully; that happens on the next page.

Data entered in the **Title** field displays on the top of every page. The Problem Title should be a short, concise statement of the problem. The field is limited to 100 characters, so just describe the 'big picture' of the problem. You will describe the problem in great depth on the next page.

Problems are categorized by **Location, Area, Work Process** and **Work Activity**. By indicating where the problem occurred as closely as applicable, it can easily be searched for in the **Library** and in **Reports**. If the problem occurs across the organization, select only the **Location**, but if it is only involves a single work process, select a value in all four of the fields (Location, Area, Work Process and Work Activity). Note: the names of these categories may be different, depending on how your organization has configured the system.

You can click **Preferences** and change your default setting for this page under the **Registration** tab. You can choose the **Location, Area, Work Process, Work Activity** and **Country** and **Time Zone** that you want to be automatically filled in every time you start a new Problem Identification or 8D.

When problems only need to be identified, they can be logged and closed out on a single page on the Problem Identification tab. This is great for logging something that doesn't require an 8D investigation, but should be noted anyway. When these less urgent problems are identified, trends can be spotted and areas for improvement identified. Just check the **Close Problem** check box before clicking **Save/Next** to close the problem without doing any further investigating.

The shared system has a primary and a secondary owner for every problem. When you are the primary owner you will see a **Convert PI to 8D** checkbox. Check this box to have the issue converted from a Problem Identification to a full 8D investigation.

Problem Classification and Ownership

- **Location:** Actual geographical site. Example: Nashville, Portland, etc.
- **Area:** A specific organizational area identified by its clearly defined work processes and standardized, pre-identified requirements. Example: Quality Assurance, Production, etc.
- **Work Process:** A group of work activities related to a common process. Example: Preventive Maintenance.
- **Work Activity:** a group of work instructions that relate to a common activity. Example: Vent Tube change, Labeler changeover, conveyor rail adjustment, etc.
- **Problem Owner:** The person(s) who takes ownership of all aspects of a problem and assumes responsibility for acting with a sense of urgency, competence and accountability in an effort to define and implement an effective solution.

Note: These fields may be different depending on the structure your organization set-up.

Team Members

You can add team members to the current problem by clicking on this link.

The primary and secondary **Problem Owners** and the user currently logged in are automatically added as Full Team Members. The only exception to this rule is when a read only team member is added as the problem owner. You will not see those names on the list of colleagues to add as Team Members, since they are already on the problem team.

In the Team Members window, the supplier owners will be listed first, followed by the host owners. Select one or more colleagues from the upper box. Press **Add** to move them to the **Team Members** section. Each Team Member can be assigned as **Full** or **Read Only**. Full Team Members have both read and write access to the problem. Read Only Team Members do not have write access to a problem; they can only see the problem report and have Actions assigned to them.

Each Team Member is automatically entered with Active status. If a Read Only User (as determined by their registration information) is added to the team, they are automatically added to the list with read only privileges. Team Members cannot be deleted, so by removing the checkmark from the **Active** checkbox, a Team Member can be made inactive. They can read the problem report, but they cannot be assigned any actions and are no longer part of the active team.

Add all new Team Members before changing the individual parameters at the bottom of the Team Members pop-up screen. Changes to individual parameters are not saved if you add an additional Team Member prior to pressing the **Save** button.

Team Groups are a pre-defined group of users who often work together on problems. By selecting a group on the Team Groups select box then clicking '**Add**' all members of that pre-

defined group will be added to the team. The team Member list on the bottom of the page will immediately be updated and saved.

You can search for team members using the Last Name Search field and clicking Search.

Close closes this window and returns you to the calling screen.

Action Description

Action Descriptions appear on most data entry screens, and apply to that specific screen.

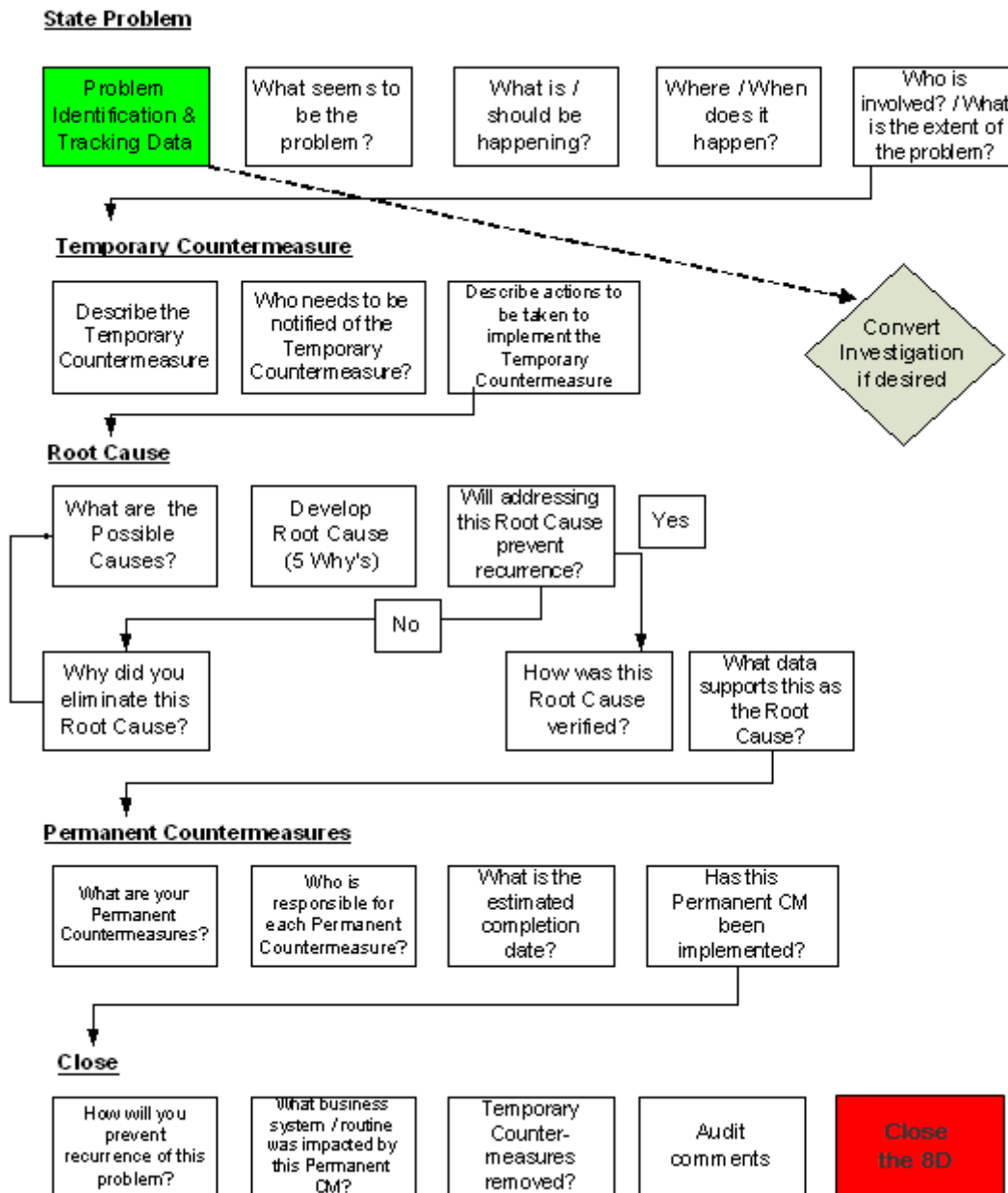
An Action Description section will appear on the Problem Identification page once **Team Members** have been designated and the screen has been saved. You may then enter Action Descriptions that pertain to this Problem Identification screen. A **Responsible** person must be selected to enable the **Send Email** checkbox. The **Responsible** drop down list will include only **Team Members** of this problem. On initial entry of an Action Description an e-mail will automatically be generated.

Once a **Completion Date** has been entered the **Status** will change to *Closed* automatically.

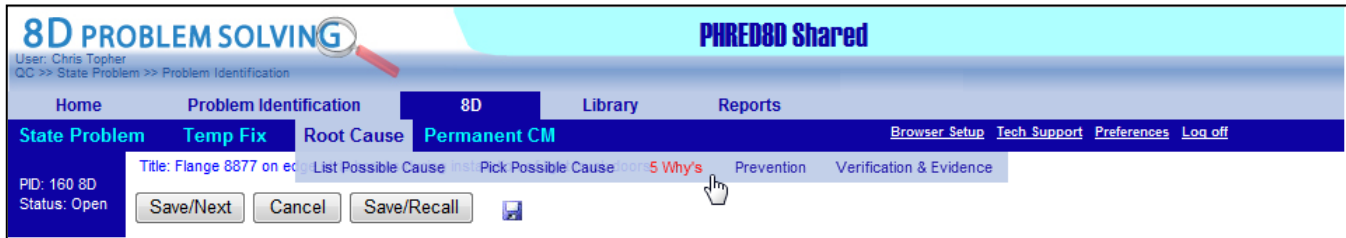
Suppliers can only see actions that are marked visible to them. Host owners and team members can mark their actions 'Visible to Host Only' so the supplier can only see some actions for a particular problem.

Press **Add Action** to add an additional Action Description.

Chapter 4 – 8D Report



Note: The questions in your system may be different.



When working on an 8D, the screen names are displayed below the 8D tab. You can jump from one screen to the next as long as the required information for that screen has been entered. (For example, a Title must be entered on the Problem Identification screen to access any other screen.)

The screen you are currently working on is displayed in white. When you “mouse-over” another screen name, that screen name turns white. Click on the screen name you would like to access to jump to that screen. Some screens have sub-options that are displayed when you “mouse over” as shown above. Note: If any screen name is displayed in gray, that screen is not accessible.

Your location in the program is displayed in blue text underneath the PHRED 8D Problem Solving logo.

You can change your **Preferences** so that when you open a data entry screen (i.e. Problem Identification and 8D), the screen will default to information that you enter most often. For example, you can change your Preferences so that as soon as you get to the Problem ID or 8D screen, the Location and Area are already filled in with the default information that you have chosen in the Preferences window.

8D PROBLEM SOLVING

PHRED8DShared

User: Ann Lim
QC >> State Problem >> Problem Identification

Home
Problem Identification
8D
Library
Reports

State Problem D1/2
Temp Fix D3
FI-FA
Root Cause D4
Solutions D5/6
Browser Setup Tech Support Preferences Log off

Attachments
 History
 Minutes
 Notes
 Reminders
 Report
 Revisions
 Email
 Team
 Help
 Coach
 Experts
 Map

PID: 1550 8D
Status: Open

Title: flange 8877 won't stay in place

Save/Next
Cancel
Save/Recall

* Indicates required field

* Title (D2): Flange 8877 Edge strip breaks during installation of light truck doors

* Location: Allentown

Area: Maintenance

Host Owner: Stout, Monica

Supplier Owner: Lim, Ann SupplierB

Mfg Site: KKJ

Shr With: SupplierB

Occurrence: Date: 05/09/2015 Time: 3:26 PM Time Zone: U.S. EST GMT -5

Initiated By: Ann Lim, SupplierB Date: 05/04/2015 Last Updated By: Ann Lim Date: 5/4/2015

Team Members: Ann Lim, and Monica Stout

Enter Tracking Data information below: (D2)

Tracking Data System: SupplierB (41)

Product Name: Flange 8877

Product Number: 8877

Product Line: Diode

Date Ordered: 5/5/2015

Production Date: 4/19/2015

Shipment Date: 5/6/2015

Due Date: 5/19/2015

Send Supplier Email To: Supplier Only All Team Members Send Supplier Email CC Sender

ID. Action Description	Due Date	Completion Date	Send Email	Delete
Responsible (PID 1550 8D Team Members only)	Status	Type		Sub-Type
Completion Comments (Validation / Verification)	Last Updated By			
1. check that spec is correct Lim, Ann : SupplierB : manf mgr	5/19/2015		<input checked="" type="checkbox"/> Send Email	<input type="checkbox"/> Delete
	Open	Containment		Failure Analysis

Note: You must select a Responsible person to enable the Send Email checkbox.

Add Action
All Other Actions

Problem Identification

The Problem Identification screen is the first step in creating an 8D. You must enter data in the required fields, designated by an asterisk, to save this page and move on to the next step. The purpose of the Problem Identification screen is to identify and categorize a problem, not to describe it fully, that happens on the next page.

Data entered in the **Title** field displays on the top of every page. The Problem Title should be a short, concise statement of the problem. The field is limited to 100 characters, so just describe the 'big picture' of the problem. You will describe the problem in great depth on the next page.

Problems are categorized by **Location, Area, Work Process** and **Work Activity**. By indicating where the problem occurred as closely as applicable, it can easily be searched for in the **Library** and in **Reports**. If the problem occurs across the organization, select only the **Location**, but if it is only involves a single work process, select a value in all four of the fields (Location, Area, Work Process and Work Activity). Note: the names of these categories may be different, depending on how your organization has configured the system.

Save/Next saves the information that you have entered and moves you to the next step in this problem solving process. **Cancel** returns you to the previous screen. **Save/Recall** saves the information that you have entered and returns you to this screen. This is helpful if you want to add **Actions** to this screen before moving on.

Problem Classification and Ownership

- **Location:** Actual geographical site. Example: Nashville, Portland, etc.
- **Area:** A specific organizational area identified by its clearly defined work processes and standardized, pre-identified requirements. Example: Quality Assurance, Production, etc.
- **Work Process:** A group of work activities related to a common process. Example: Preventive Maintenance.
- **Work Activity:** a group of work instructions that relate to a common activity. Example: Vent Tube change, Labeler changeover, conveyor rail adjustment, etc.
- **Problem Owner:** The person(s) who takes ownership of all aspects of a problem and assumes responsibility for acting with a sense of urgency, competence and accountability in an effort to define and implement an effective solution.

Note: These fields may be different depending on the structure your organization set-up.

ID	Action Description	Due Date	Status	Completion Date	Send Email	Delete
	Responsible (PID 160 8D Team Members only) Completion Comments (Validation / Verification)		Last Updated By	Type	Sub-Type	
1.	Analyze return hold collection data to see what the average volume of edge strip breaks over the last 2 years Tophers, Chris : Supplier One : n/a data analysis attached	4/29/2012	Closed	5/8/2012	<input type="checkbox"/> Send Email	<input type="checkbox"/> Delete
2.	notify final inspection about change to specification SP5647 Tophers, Chris : Supplier One : n/a	4/30/2012	Open	5/4/2012	<input checked="" type="checkbox"/> Send Email	<input type="checkbox"/> Delete

Note: You must select a Responsible person to enable the Send Email checkbox.

PHRED SOLUTIONS Other Actions

Friday, April 27, 2012 12:14:01 PM (MDT)

ID: 160 8D Problem Title: Flange 8877 on edge strip breaks during installation of light truck doors			
Screen Name			
ID	Action Description	Status	Due Date
		Responsible	Completion Date
		Type	SubType
		Last Updated	Edit
Completion Comment			
Screen Name: Temp CM			
1.	Add a quality station between the receiving area and bins 28 and 29.	Closed	5/1/2012
		Chris Topher	5/4/2012
		Investigative	Data Analysis
		By: Chris Topher Date-Time: 4/28/2012-16:40	<input type="button" value="Edit"/>
2.	Increased shipments to make up numbers.	Closed	5/1/2012
		Chris Topher	5/8/2012
		Preventive	Process Change
		By: Chris Topher Date-Time: 4/28/2012-16:40	<input type="button" value="Edit"/>
Screen Name: Permanent CM			
1.	look over specs on part number G558	Open	
		Chris Topher	
		Corrective	Validate
		By: Chris Topher Date-Time: 4/28/2012-17:35	<input type="button" value="Edit"/>

Action Description

Action Descriptions appear on most data entry screens, and apply to that specific screen.

An Action Description section will appear on the Problem Identification page once **Team Members** have been designated and the screen has been saved. You may then enter Action Descriptions that pertain to this Problem Identification screen. A **Responsible** person must be selected to enable the **Send Email** checkbox. The **Responsible** drop down list will include only **Team Members** of this problem. On initial entry of an Action Description an e-mail will automatically be generated.

Once a **Completion Date** has been entered the **Status** will change to *Closed* automatically.

Suppliers can only see actions that are marked visible to them. Host owners can mark their actions 'Visible to Host Only' so that the supplier can only see some actions for a particular problem.

Add Action

Press **Add Action** to add an additional Action.

All Other Actions

Press **All Other Actions** to display all actions recorded for this problem. You may modify individual actions from this report by pressing the **Edit** button.

8D PROBLEM SOLVING PHRED8D Shared

User: Chris Topher
QC >> State Problem >> Problem Details

Home Problem Identification **8D** Library Reports

State Problem Temp Fix Root Cause Permanent CM Browser Setup Tech Support Preferences Log off

PID: 160 8D
Status: Open

Save/Next Cancel Save/Recall

Title: Flange 8877 on edge strip breaks during installation of light truck doors

Problem Statement (What seems to be the problem?)(D2)
Edge Strip breaks during installation on light truck doors on models XLT & PDQ

What is actually happening?
1. Inner strip splits when outer strip is applied. 2. Outer strip breaks when installed over inner strip. The temperature impacts on the performance of the edge strips during

What should be happening?
of the door frame. The outer strip should apply sufficient pressure on the inner strip creating a seal between the inner strip and the door frame.

Where does it happen?
Door assembly spur, station 7, bin 28 and 29

When does it happen?
Blanks. The problem began with supply shipment 200603041127 and has continued sporadically throughout following shipments on both sides of the line.

What is the extent of the problem?
The material composition of the outer Edge Strip lacks sufficient flexibility (ductility) to seal the inner strip to the blank without causing damage to the inner edge strip or

History, Notes and Team Members have been added to this screen as indicated by the yellow links.

ID.	Action Description	Due Date	Completion Date	Send Email	Delete
Responsible (PID 160 8D Team Members only)	Completion Comments (Validation / Verification)	Status	Type	Sub-Type	
		Last Updated By			
1.	Analyze return hold collection data to see what the average volume of edge strip breaks over the last 2 years Topher, Chris : Supplier One : n/a data analysis attached	4/29/2012 Closed	5/8/2012 No Value Selected	<input type="checkbox"/> Send Email	<input type="checkbox"/> Delete
Last Updated By: Avishek test this Date-Time: 4/26/2012-03:53 PM					
2.	notify final inspection about change to specification SP5647 Topher, Chris : Supplier One : n/a	4/30/2012 Open	5/4/2012 Corrective	<input checked="" type="checkbox"/> Send Email	<input type="checkbox"/> Delete Process Change
Note: You must select a Responsible person to enable the Send Email checkbox.					

Add Action All Other Actions

Problem: a deviation from the desired standard of a work process, work activity or work instruction.

Problem Statement: a singular sentence that best describes a deviation from the desired standard of the product, work process or work activity.

A Best Practice is the best combination of people, machines and raw materials that utilize minimal space, labor and inventory and work together to achieve a desired result.

Problem Details

Developing a clear problem statement that you can share with others can be quite difficult. This section walks you through the development of one. Ideally, problem details should be well thought out, specific, and complete. If the problem is difficult to fully identify, enter what you understand so far, then you will be guided through developing a clearer understanding of the problem. Use the following questions to develop an understanding of the problem and collect the relevant data.

What is actually happening versus what should be happening?

Differentiating between what is actually happening and what ideally should happen is crucial to developing a thorough understanding of the problem. Can you find a standard to compare it to? It may not be documented. Does one exist? You may need to get agreement to what the standard actually is or what is commonly accepted.

Describe in specifics, not in generalizations. If you cannot provide specifics, you need to go see. Use these questions as the foundation for discussion. Do not limit yourself to interacting solely with the computer.

Where and when does it happen?

Pinpoint when the problem occurs. Be as specific as you can. You may also enter places where you specifically do NOT experience the problem. By exploring a bit, you may find that many different areas are involved in a problem. Often there are different location definitions of the problem. This question may contain both operational and employee relation issues (confidence, motivation, perceptions). It allows you to get very specific about the physical location of problem solving efforts.

Who is involved?

Find out those involved in the problem. Include internal and external customers that are affected by the problem. This will reveal who you will need to involve in later stages of the problem solving process. There can be more people involved in the problem than initially apparent.

What is the extent of the problem?

Here you need to work out how "big" the problem is. It can include costs, quality issues, safety issues, and even organizational image issues. For example, you might consider how much this is costing the organization, was anyone injured, how much waste is produced or how long the line was down.

Note: These questions may be rephrased to reflect your situation.

8D PROBLEM SOLVING
PHRED8D Shared

User: Chris Topher
QC -> Temp CM
Home Problem Identification **8D** Library Reports

State Problem Temp Fix Root Cause Permanent CM
Browser Setup Tech Support Preferences Log off

PID: 160 8D
Status: Open

Title: Flange 8877 on edge strip breaks during installation of light truck doors

Summarize the Temporary Countermeasures (D3)
 Increased shipments to make up numbers. Added a quality station between the receiving area and bins 28 and 29.

Who needs to be notified of the Temporary Countermeasure? (D3)
 Production, dispatch, quality, and planning

When was the containment complete? (leave blank if n/a)

Date: {mm/dd/yyyy} Time: {h:mm AM/PM or HH:MM} Time Zone: Malaysia APEC GMT +8

Is there a safety risk? If yes, explain.

Yes No Don't Know

Did defective product escape from our facility?

Yes No Don't Know

If no, explain how you know. If yes, describe the quantity, identifying data, and suspect locations.

Did defective product escape to Host Customer?

Yes No Don't Know

If yes, describe the quantity, identifying data, and suspect locations.

ID.	Action Description Responsible (PID 160 8D Team Members only) Completion Comments (Validation / Verification)	Due Date Status Last Updated By	Completion Date Type	Send Email	Delete Sub-Type
1.	Add a quality station between the receiving area and bins 28 and 29. Topher, Chris : Supplier One : n/a	5/1/2012 Open	5/4/2012 Investigative	<input checked="" type="checkbox"/> Send Email	<input type="checkbox"/> Delete Data Analysis
2.	Increased shipments to make up numbers. Topher, Chris : Supplier One : n/a	5/1/2012 Open	5/8/2012 Preventive	<input checked="" type="checkbox"/> Send Email	<input type="checkbox"/> Delete Process Change

Note: You must select a Responsible person to enable the Send Email checkbox.

Note: You must select a Responsible person to enable the Send Email checkbox.

Actions taken, or to be taken, have been entered here to implement this temporary fix.

Temporary Fix: A Work Process, Work Activity or work instruction revision designed and implemented to temporarily remedy a problem while continuing to develop a Solution for the Root Cause.

Temporary Fix

Now that you know what's wrong, it's time to apply the band-aid. Some call it temporary countermeasures, others call it interim containment. The intention is to temporarily control the situation at the scene of the problem. These actions are temporary and *must* be removed when the problem is solved.

Summarize the Temporary Fix

Temporary Fix is a work process, work activity or work instruction revision designed to temporarily remedy a problem until a Permanent Solution is developed for the as yet undetermined Root Cause. Identify the Temporary Fix in the broad sense. If there already is a Temporary Fix in place, identify it. Be sure your Temporary Fix does not create any other problem(s).

Describe how you will implement the Temporary Fix in enough detail that it could be removed later by someone other than yourself.

Who needs to be notified of the Temporary Fix?

Enter the name(s) and Location, Area, Work Process and Work Activity which need to be aware of the temporary fix. This can include individuals who will need to contribute to or maintain the Temporary Fix.

Is there a safety risk? If yes, explain.

It is important to explicitly determine if this problem poses a safety risk. If it does, be sure to include how you will mitigate the risks as part of your action plans.

Did defective product escape?

If product left the production facility or reached the customer(s), alerting the customer and containing the problem should be an action.

Note: These questions may be rephrased to reflect your situation.

Enter all actions that need to be taken to implement this Temporary Fix in the **Action Description** section of the page. Enter the name of the team member **Responsible** for completing these actions. An e-mail will automatically be sent to that person on the initial save of an Action Description to notify them.

Press **Add Action** to add an additional Action Description.

To delete an Action Description, place a checkmark in the **Delete** checkbox. A confirmation pop-up will appear for your protection. Press **All Other Actions** to display all actions recorded for this problem, excluding those that have been added in this page.

8D PROBLEM SOLVING PHRED8D Shared

User: Chris Topher
QC >> Root Cause >> List Possible Cause

Home Problem Identification **8D** Library Reports
Browser Setup Tech Support Preferences Log off

State Problem Temp Fix Root Cause **Permanent CM**

Title: Flange 8877 on edge strip breaks during installation of light truck doors

Attachments
 Current Possible Cause: PC-1: slots in the edge strip vary in opening. slots too narrow causes damage to inner strip

History
 * Indicates required field.

Describe each possible Root Cause that will be further investigated (D4)

* slots in the edge strip vary in opening. slots too narrow causes damage to inner strip	<input type="checkbox"/>	Delete
A botarm is pushing the edge strips onto the door with too much pressure	<input type="checkbox"/>	Delete
The doors are too wide not meeting spec #100357008	<input type="checkbox"/>	Delete

 (15 Max — Remaining: 12)

A Possible Cause is anything that you observe that could create this problem.

At least one box must be filled in to move forward.

Click **Add** to create additional Possible Cause boxes.

8D PROBLEM SOLVING PHRED8D Shared

User: Chris Topher
QC >> Root Cause >> Pick Possible Cause

Home Problem Identification **8D** Library Reports
Browser Setup Tech Support Preferences Log off

State Problem Temp Fix Root Cause **Permanent CM**

Title: Flange 8877 on edge strip breaks during installation of light truck doors

History
 Pick a Possible Cause (D4)

PC-1: slots in the edge strip vary in opening. slots too narrow causes damage to inner strip PC-2: A botarm is pushing the edge strips onto the door with too much pressure PC-3: The doors are too wide not meeting spec #100357008	<p>A Possible Cause is anything that you observe that could create this problem.</p> <p>It is advised to work through all of the listed Possible Causes.</p>
--	--

Root Cause

List Possible Cause

Here the team identifies any and all possible causes. A possible cause is a knowledge and experience based statement of a likely factor, which if removed or changed might stop the occurrence of the problem.

List the team's hypotheses for root cause based on your grasp of the situation. You must enter at least one.

This is based on:

- General experience
- Knowledge of the process
- Past experience in problem solving
- Common sense and logic

Pick Possible Cause

Select the Possible Cause you wish to begin to explore by highlighting the Possible Cause and then clicking **Save/Next**.

You may work through as many Possible Causes as you wish.

If you are not able to get to Root Cause with a Possible Cause, go back one screen and brainstorm up a few more Possible Causes.

Strongly consider asking the Stakeholders directly for suggestions, input, and ideas and then return here to develop them fully. Using cross-functional teams may provide insight in areas of expertise you might not have considered.

8D PROBLEM SOLVING **PHRED8D Shared**

User: Chris Topher
QC >> Root Cause >> 5 Whys

Home Problem Identification **8D** Library Reports

State Problem Temp Fix Root Cause Permanent CM [Browser Setup](#) [Tech Support](#) [Preferences](#) [Log off](#)

PID: 160 8D
Status: Open

Attachments Current Possible Cause: PC-2: A botarm is pushing the edge strips onto the door with too much pressure

History * Indicates required field.

Develop the actual Root Cause by creating a Why Chain (D4)

Here you identify and confirm the Root Cause of the problem.

Why? Delete

Why? Delete

Why? Delete

Why? Delete

Why? Delete

Why? Delete

{ 10 Max — Remaining: 4 }

Continue to ask 'Why' until you reach Root Cause. Why statements can be added or deleted at any time until the problem is closed.

...s you to build a cause/effect
...ng your Root Cause
...blems need to be opened as
... should be addressed.

5 Why's

The purpose of the "Why Chain" process is to search beyond the immediate cause of the problem and stop problem reoccurrence. Determining Root Cause normally requires answering "Why?" at a minimum of three to five times. If you are stuck, try this:

Considering the Problem Statement and the Current Possible Cause, say out loud, "Why did/does (state the current Possible Cause) happen?"

That should generate a reason of some kind. If it is not the root cause, click **Add** then ask, "So why did/does that happen?" Repeat this step until you have reached root cause.

Problem Example: A welding robot stops in the middle of its operation.

Why did the robot stop? Fuse in the robot has blown

Why is the fuse blown? Circuit overload

Why is the circuit overloaded? The bearings have damaged one another and locked up

Why have the bearings damaged one another? There was insufficient lubrication on the bearings

Why was there insufficient lubrication on the bearings?
Oil pump on robot is not circulating sufficient oil

Why is the pump not circulating sufficient oil?
Pump intake is clogged with metal shavings

Why is the intake clogged with metal shavings? *Root Cause* \implies No filter on pump intake (as designed).

If you find more problems while creating your Why Chain, they need to be opened as new problems, if you decide they should be addressed.

Add opens a new box in which additional information may be entered. The maximum number of Why Statement boxes is specified in the blue text located next to the **Add** button.

When you select the **Delete** check box next to a Why Statement, it brings up a message to confirm the deletion. The item with the check mark is physically deleted when you click **Save/Next**.

8D PROBLEM SOLVING PHRED8D Shared

User: Chris Topher
QC >> Root Cause >> Prevention

Home Problem Identification **8D** Library Reports

State Problem Temp Fix Root Cause Permanent CM [Browser Setup](#) [Tech Support](#) [Preferences](#) [Log off](#)

PID: 160 8D
Status: Open

Attachments Current Possible Cause: PC-2: A botarm is pushing the edge strips onto the door with too much pressure
Last Why: No filter on pump intake (as designed)

History Do you want to eliminate this Possible Cause? (D4) if you cannot verify that it makes the

Mtg Minutes Yes - This is a dead end. Stop investigating it. In this case, we have found that this is not the Root Cause so it is eliminated. If you chose "Yes" above, you must answer why you chose to eliminate it.

Notes No - This is a valid RC and requires Permanent CM. believe fixing it will prevent this problem

Reports * Why did you eliminate this Possible Cause? (D4)

Revisions discovered that the supplier is not part of this

Send E-Mail

Team Mbrs

Help

Coach

Experts * Indicates required field.

8D PROBLEM SOLVING PHRED8D Shared

User: Chris Topher
QC >> Root Cause >> Prevention

Home Problem Identification **8D** Library Reports

State Problem Temp Fix Root Cause Permanent CM [Browser Setup](#) [Tech Support](#) [Preferences](#) [Log off](#)

PID: 160 8D
Status: Open

Attachments Current Possible Cause: PC-2: A botarm is pushing the edge strips onto the door with too much pressure
Last Why: No filter on pump intake (as designed)

History Do you want to eliminate this Possible Cause? (D4) You should eliminate this Possible Cause if you cannot verify that it makes the

Mtg Minutes Yes - This is a dead end. Stop investigating it.

Notes No - This is a valid RC and requires Permanent CM. In this case, we know this is the true Root Cause. We will keep it and use it to prevent recurrence of the problem. you believe fixing it will prevent this problem

Reports Why did you eliminate this Possible Cause? (D4)

Revisions

Send E-Mail

Team Mbrs

Help

Coach

Experts

Prevention

The Current Possible Cause and Root Cause (Last Why) that you are currently working with are displayed in blue text next to the **Change PC** button.

Change PC allows you to change the Possible Cause you are working with.

Do you want to eliminate this Possible Cause?

The intention of this question is to eliminate any Possible Causes that are not the true Root Cause. You should eliminate this Possible Cause if you cannot verify that it turns the problem on or off. Keep this Possible Cause if you believe fixing it will prevent this problem from happening again.

Scenario A: If the answer is **Yes**, you will need to explain why you eliminated this Root Cause. When you click **Save/Next** you will be returned to the List Possible Cause screen where you may redefine the Possible Cause, or pick a different Possible Cause to explore.

Scenario B: If you believe addressing this Root Cause will prevent this problem from happening again, click **No** and then **Save/Next**. Note: If you choose No, the field below will be disabled.

Selecting **No** and pressing **Save/Next** moves you to the next step in the problem solving process.

Why did you eliminate this Root Cause?

If you selected **Yes** to the question “Do you want to eliminate this possible cause?” you are required to explain why you eliminated the current Root Cause, as shown in scenario A on the previous page.

If you selected **No**, like in scenario B on the previous page, this field is not enabled.

8D PROBLEM SOLVING

PHRED8D Shared

User: Chris Topher
QC >> Root Cause >> Verification and Evidence

Home
Problem Identification
8D
Library
Reports

State Problem
Temp Fix
Root Cause
Permanent CM
Browser Setup Tech Support Preferences Log off

PID: 160 8D
Status: Open

Attachments

History

Mtg Minutes

Notes

Reports

Revisions

Send E-Mail

Team Mbrs

Help

Coach

Experts

Where Am I?

Title: Flange 8877 on edge strip breaks during installation of light truck doors

Current Possible Cause: PC-2: A botarm is pushing the edge strips onto the door with too much pressure
Last Why: No filter on pump intake (as designed)

How was this Root Cause verified? (D4)

Justin Tridek from maintenance used visual inspection after a negative result on the diagnostic tests run on 2/05/2012.

Describe how you verified the Root Cause.

Be sure to include who gathered the data, and when and where any observations were performed.

What data/evidence supports this event as the Root Cause? Attach it. (D4)

- Commonality Analysis
- DOE
- F/FA
- Fishbone diagram
- Flowcharts
- FMEA
- FT
- Histograms
- Other
- Run Chart
- Supplier 8D Report
- Test12

* Root Cause Group:

* Sub Group:

* Commodity:

* Supplier Name:

* Supplier Part Number:

Host PN (if exists):

Note: Your organization's business systems will be entered here. Options are stored in the Supporting Data Types table in the Administrator section.

Note: The data/evidence checkboxes can be changed in the Admin section. The Root Cause Group and Sub Group can also be changed in the Admin section.

Verification & Evidence

The Current Possible Cause and Root Cause (Last Why) that you are working with are displayed in blue text next to the **Change PC** button.

Change PC allows you to change the Possible Cause you are working with. For the Change PC button to be enabled, you must have more than one *verified* root cause.

Remember, here you are simply confirming that you identified the Root Cause. It is NOT verification that the Solution will cure the problem.

How was this Root Cause verified?

Describe how you decided that the last ‘Why?’ really is or was the Root Cause. Be as specific as possible. You should be able to show that you can turn the problem on and off with the removal of the root cause. If you have a plan to verify your hypothesis, enter it. Many times it is verified through observation, so go and see if this is it.

What data/evidence supports this event as the Root Cause?

List and attach the supporting data (files). Remember, here you are simply confirming that you identified the Root Cause and indicating which sources you used. It is NOT verification that a Permanent Solution will cure the problem.

Sample Business Systems Include:

- Commonality Analysis
- DOE
- FI/FA
- Fishbone Diagram
- Flowcharts
- FMEA
- FT
- Graph
- Histograms
- Other
- Pictures
- Run Chart
- Supplier 8D Reports

Save/Next saves the information you have entered and moves you to the next step in this problem solving process.

Press the **How Do I Navigate?** button on the Help pop-up for directions on how to navigate around the system.

The screenshot displays the PHRED8D Shared software interface. At the top, it says "8D PROBLEM SOLVING" and "PHRED8D Shared". The user is identified as "Chris Topher" with the role "QC" and the current problem is "Permanent CM". The navigation bar includes "Home", "Problem Identification", "8D", "Library", and "Reports". Below this, there are tabs for "State Problem", "Temp Fix", "Root Cause", and "Permanent CM". The main content area shows a problem title: "Flange 8877 on edge strip breaks during installation of light truck doors". It includes a "Save/Next" button, a "Cancel" button, and a "Save/Recall" button. The interface is divided into several sections: "Attachments", "History", "Mtg Minutes", "Notes", "Reports", "Revisions", "Send E-Mail", "Team Mbrs", "Help", "Coach", "Experts", and "Where Am I?". The "History" section contains a list of actions: "Summarize Your Permanent Countermeasures - What is the Overall Plan? (D5)", "Who needs to be notified of the Permanent Countermeasures", "How did you verify that this will prevent recurrence?", and "How will you verify that the problem does not happen again?". The "Notes" section contains a list of actions: "of edge strips from manufacturer", "2 Adjust the maintenance schedule for the lubrication nozel on the botarms Maintenance and Operators of botarms 10/14/2007", and "3 Manufacture a mechanism to measure the edge strips prior to the botarm picking them out of the bins". The "Who needs to be notified of the Permanent Countermeasures" section contains the text: "Receiving, Quality, Maintenance and Operators of botarms, Production". The "How did you verify that this will prevent recurrence?" section contains the text: "tested it in cells 23, 26, 29". The "How will you verify that the problem does not happen again?" section contains the text: "added to the periodic audit of this cell so that quarterly it will be reassessed by audit engineers".

Solution: a work process, work activity or work instruction revision designed and implemented to eliminate the Root Cause of a problem.

Work Instruction: a standardized document showing the correct, predetermined sequence of steps assigned to a Work Activity.

Solutions

You need to develop numerous possible Solutions without evaluating their effectiveness. Often times a **Solution** involves a change in **Work Instruction**.

Process improvements often require a cross section of uninhibited input and a variety of alternatives, such as a cross functional team. You may wish to do this by having a facilitated brainstorming discussion.

Reminder:

- In brainstorming, all ideas are valid.
- Brainstorm as many ideas as you can.
- One idea may build on another.
- Everyone should have a chance to be heard.

What is the overall plan?

Describe the overall plan for implementing permanent corrective and preventive actions (just a summary, not the actions themselves).

Who needs to be notified of the permanent solution?

List the people and functions that are impacted by the plan.

How did you verify that this will prevent reoccurrence?

Explain what you did to prove that implementing the plan will prevent the problem from happening again. Describe how the solution was tested to make sure it works.

How will you verify that the problem will not happen again?

Explain when and how you will confirm that the problem does not happen again in the future. What monitoring system will notify you if it does happen again?

Chapter 5 - Supporting Functions

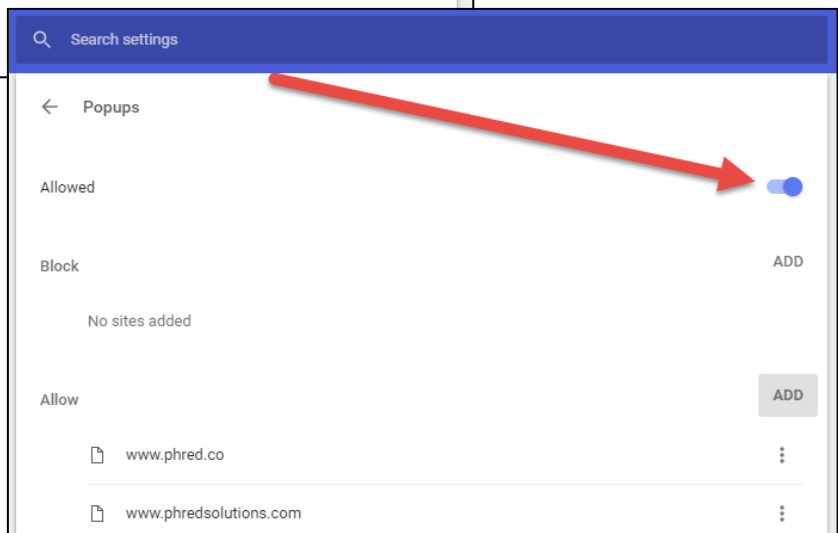
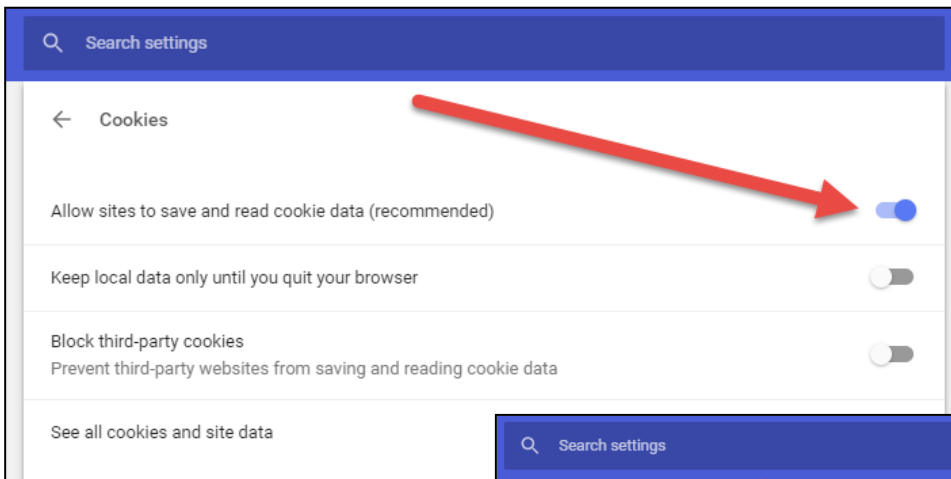
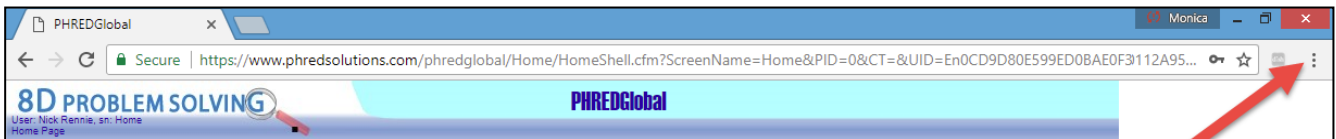
Helpful Links

The following links are located in the upper right hand corner of every screen.

Browser Setup

Select **Browser Settings** in the upper right-hand corner of any screen to access information regarding how your browser should be set up.

Unless otherwise stated, all directions in this document apply to Windows systems using Internet Explorer. In some cases, screens may look slightly different, but the functionality will be the same.



Google Chrome

Cookies

In order for PHRED to work, it must have access to a file on your PC called a **Cookie**. This Cookie holds information about your current session only. This information is used exclusively by PHRED and *WILL NOT* be shared.

To enable Cookies:

- Start **Google Chrome**.
- On the tool bar, select the three dot icon on the far right. Then, click **Settings**.
- Scroll to the bottom of the screen and select **Advanced**.
- Under Privacy and Security, select **Content Settings** then click **Cookies**.
- Then, turn on the option to **Allow sites to save and read cookie data (recommended)**.

Pop-Ups

PHRED uses **pop-ups** throughout; e.g., Browser Setup, Preferences, Team Members, etc. PHRED cannot function without pop-ups enabled. Various firewall security programs such as, Windows XP, Zone Alarm, etc. block pop-up windows from deploying. You must turn off pop-up protection while using PHRED. You may have to do this on more than one application.

To allow all pop-ups:

- Start **Google Chrome**.
- On the tool bar, select the three dot icon on top right corner. Then, click **Settings**.
- Scroll to the bottom of the screen and select **Advanced**.
- Under Privacy and Security, select **Content Settings** then click **Popups**.
- Then, turn on the **Allowed** option.

If you chose to allow pop-ups on only specific site(s), then:

- Start **Google Chrome**.
- On the tool bar, select the three dot icon on top right corner. Then, click **Settings**.
- Scroll to the bottom of the screen and select **Advanced**.
- Under Privacy and Security, select **Content Settings** then click **Popups**.
- Then, click **Add** next to the Allow section. Enter the URL of the site you wish to allow and click **Add**.

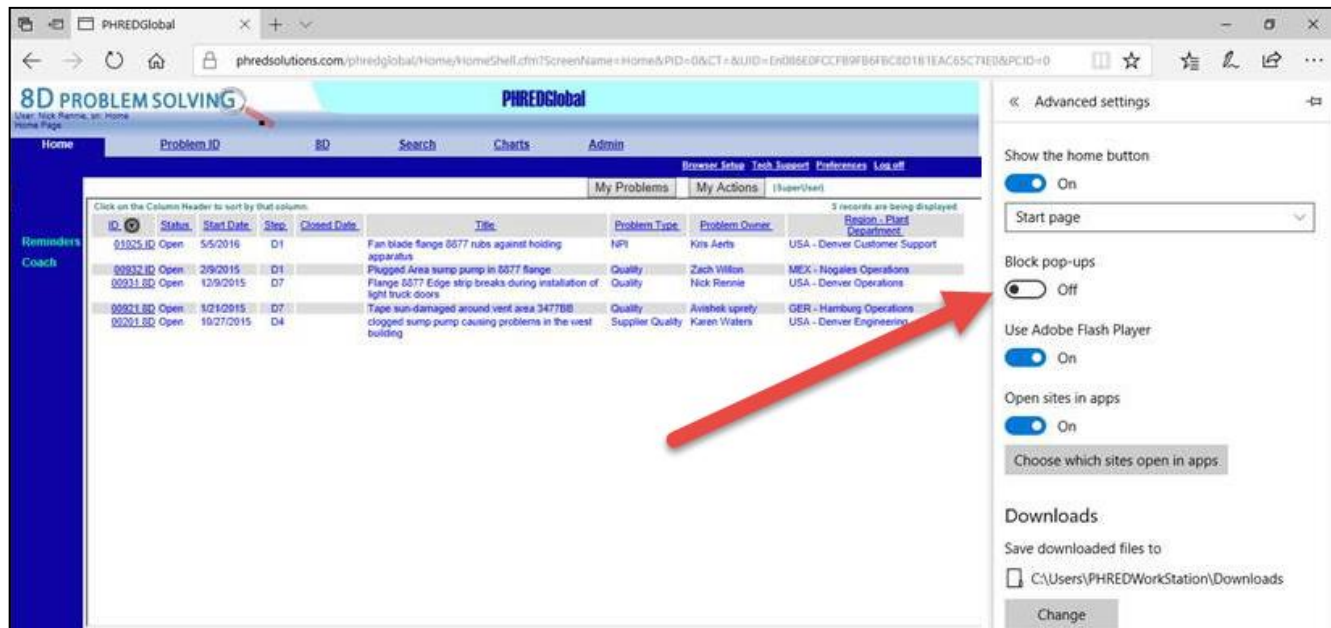
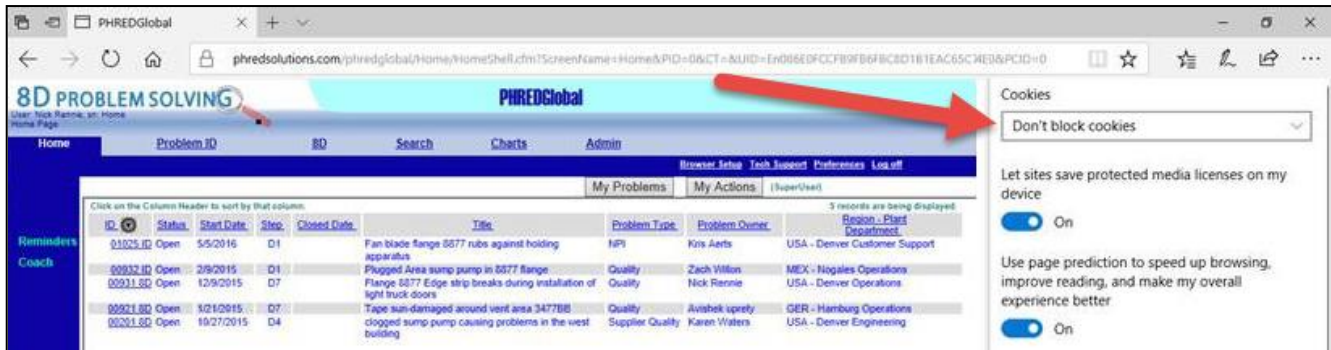
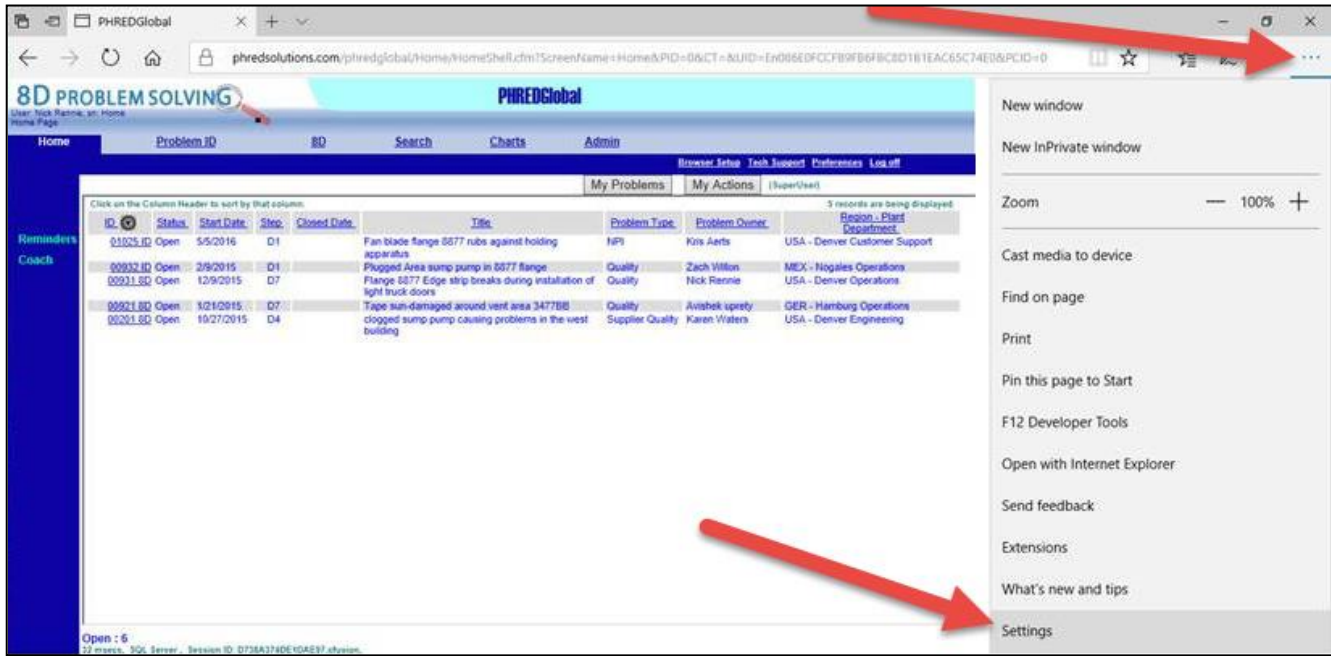
The image displays two side-by-side windows. The left window is a print dialog titled 'Print' with the text 'Total: 1 sheet of paper'. It includes 'Print' and 'Cancel' buttons. The 'Destination' is 'Xerox ColorQube 8570/...' with a 'Change...' button. 'Pages' is set to 'All'. 'Copies' is '1'. 'Layout' is 'Portrait'. 'Color' is 'Color'. 'Paper size' is 'Letter'. 'Margins' is set to 'Custom'. 'Scale' is '100'. Under 'Options', 'Headers and footers', 'Two-sided', and 'Background graphics' are all checked. A red arrow points from the 'Margins' dropdown to the 'Margins' dropdown in the Chrome settings. Another red arrow points from the 'Background graphics' checkbox to the 'Background sync' setting in the Chrome settings. The right window is a Chrome settings page titled 'Settings' with a search bar containing 'background'. The 'Background sync' setting is highlighted in yellow. The page lists various content settings like Cookies, Location, Camera, Microphone, Notifications, JavaScript, Flash, Images, Popups, Automatic downloads, Unsandboxed plugin access, and Handlers. A red arrow points from the 'Background sync' setting in the Chrome settings to the 'Background graphics' checkbox in the print dialog. The URL at the bottom is 'chrome://settings/content?search=background'.

Printing

In order for the PHRED Reports to print correctly, the margins within Internet Explorer must be set to 1/2 inch and the Background Colors and Images print setting must be enabled. To set the **Margins** and **Background** to the correct printer settings:

- Start **Google Chrome**.
- On the tool bar, select the three dot icon on top right corner. Then, click **Print**.
- Click **More Settings** then check the **Background Graphics** option.
- On the **Margins** drop down, choose **Custom**.
- Using your mouse, move the vertical blue dotted lines on the print preview image to 0.5 inches on each side.

Supplier Train the Trainer



Microsoft Edge

Cookies

In order for PHRED to work, it must have access to a file on your PC called a **Cookie**. This Cookie holds information about your current session only. This information is used exclusively by PHRED and *WILL NOT* be shared.

To enable Cookies:

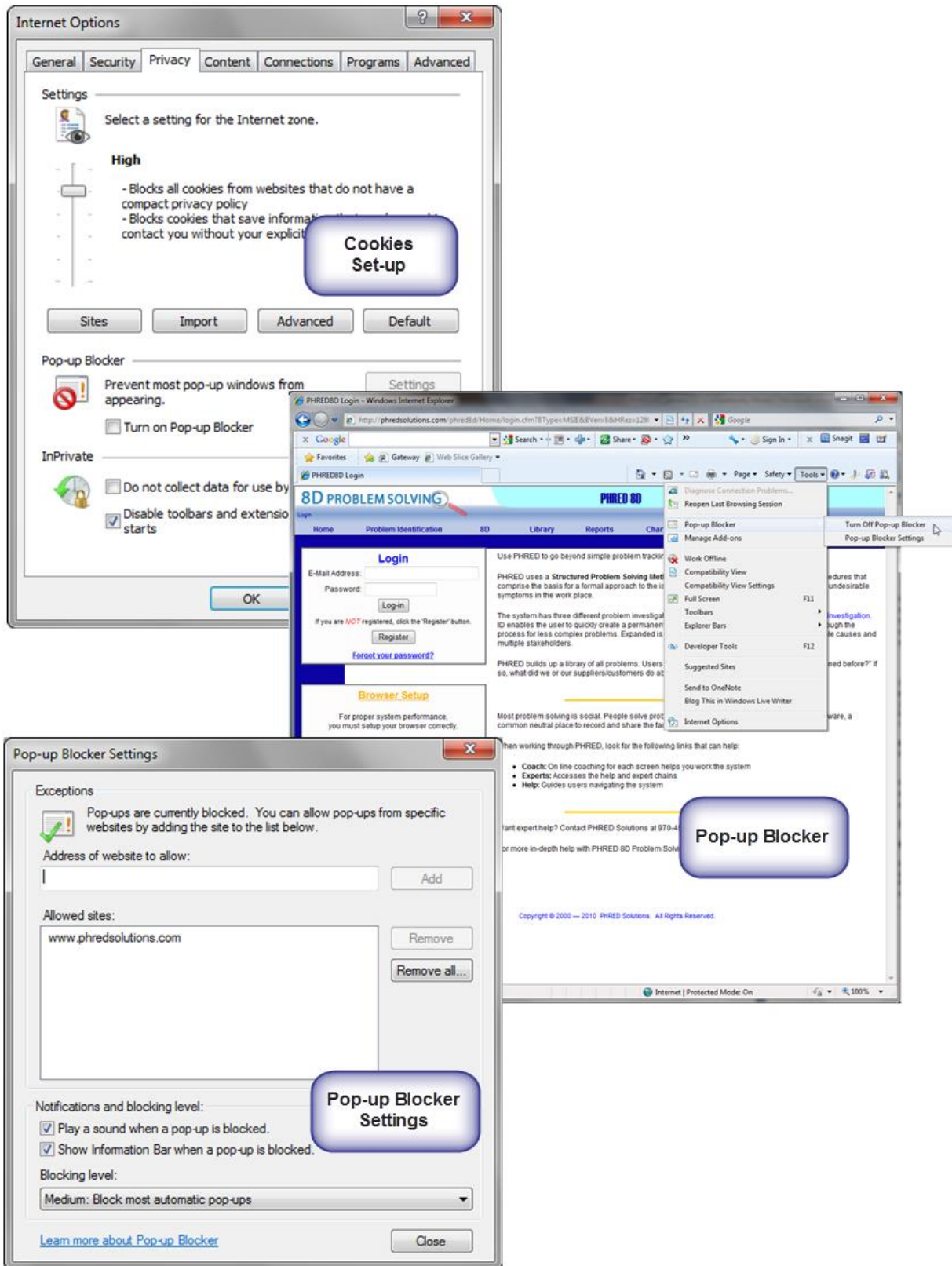
- Start **Microsoft Edge**.
- On the tool bar, select the three dot icon on the far right. Then, click **Settings**.
- Scroll to the bottom and click **View Advanced Settings**.
- Under Privacy and Services, find the Cookies drop down and select **Do not Block** cookies.

Pop-Ups

PHRED uses **pop-ups** throughout; e.g., Browser Setup, Preferences, Team Members, etc. PHRED cannot function without pop-ups enabled. Various firewall security programs such as, Windows XP, Zone Alarm, etc. block pop-up windows from deploying. You must turn off pop-up protection while using PHRED. You may have to do this on more than one application.

To allow pop-ups:

- Start **Microsoft Edge**.
- On the tool bar, select the three dot icon on the far right. Then, click **Settings**.
- Turn **Block Popups** to **Off**.




(Note: These screens are from Internet Explorer 8.0, the screens in Internet Explorer 7.0 and 9.0 – 11.0 will look slightly different.)

Internet Explorer 7.0 – 11.0

Cookies

In order for PHRED to work, it must have access to a file on your PC called a **Cookie**. This Cookie holds information about your current session only. This information is used exclusively by PHRED and *WILL NOT* be shared.


To enable Cookies:

- Start **Internet Explorer**.
- On the IE tool bar, select **Tools**  and then **Internet Options**.
- On the Internet Options pop-up window, select the **Privacy** tab.
- Click the **Default** button and then set the slider to **High**, or to a lower value if desired.
- Click **OK** to close the Internet Options pop-up.


Pop-Ups

PHRED uses **pop-ups** throughout; e.g., Browser Setup, Preferences, Team Members, etc. PHRED cannot function without pop-ups enabled. Various firewall security programs such as, Windows XP, Zone Alarm, etc. block pop-up windows from deploying. You must turn off pop-up protection while using PHRED. You may have to do this on more than one application.

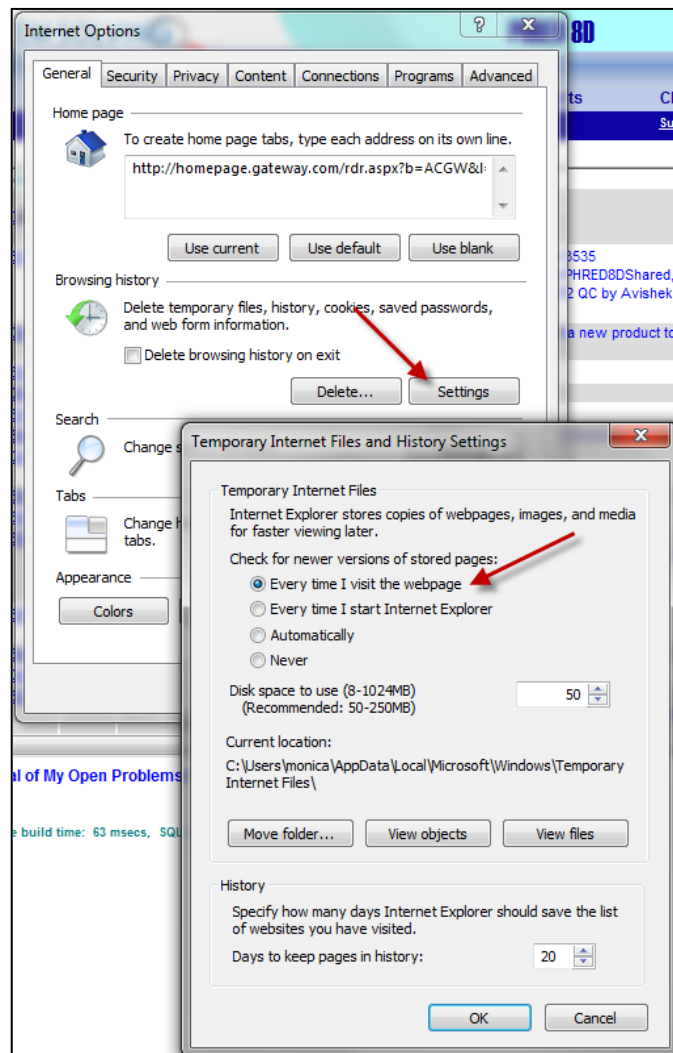
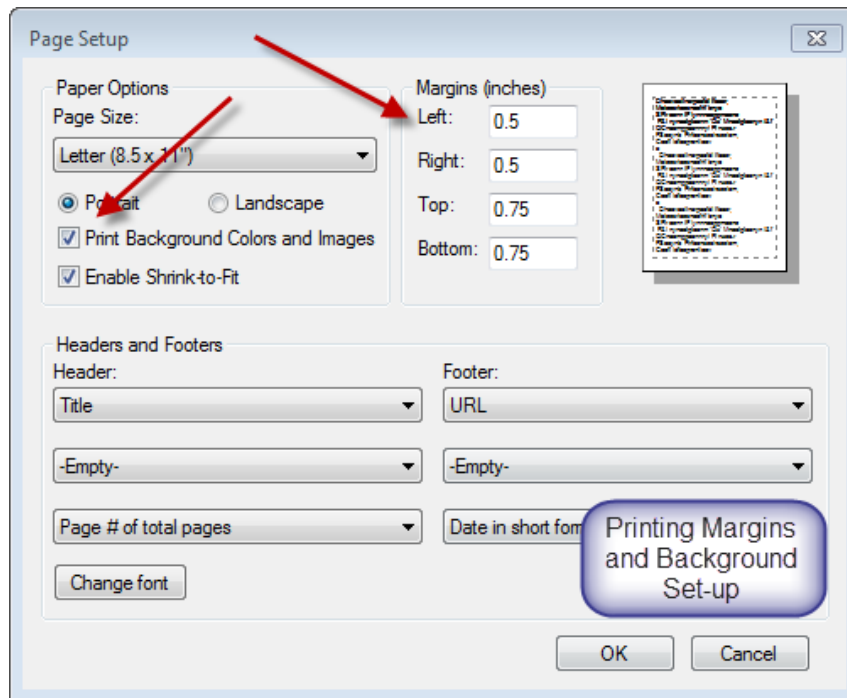
To allow all pop-ups:

- Start **Internet Explorer**.
- For Internet Explorer 7.0 & 8.0, select **Tools** and then move your mouse to expand the **Pop-up Blocker** sub-menu. If you chose **Turn Off Pop-up Blocker**, then you are done. If you would like to only allow pop-ups from specific sites, then continue in the next section.
- For Internet Explorer 9.0 – 11.0, click the **Tools**  button then click **Internet options**. On the **Privacy** tab, under Pop-up Blocker, uncheck the **Turn on Pop-up Blocker** check box, and then click **OK**. If you would like to only allow pop-ups from specific sites, then continue in the next section.

If you chose to allow pop-ups on only specific site(s), then:


- Start **Internet Explorer**.
- For Internet Explorer 7.0 & 8.0, select **Tools** and then move your mouse to expand the **Pop-up Blocker** sub-menu. Choose the **Pop-up Blocker Settings** option.
- For Internet Explorer 9.0 – 11.0, click the **Tools**  button then click **Internet options**. On the **Privacy** tab, under Pop-up Blocker, click **Pop-up Blocker Settings** option.
- On the Pop-up Blocker Screen enter the name of the PHRED Host Web server, (check with system administrator for name of host), or the web site that you want to allow pop-ups to work on.
- When all sites have been entered, click the **Close** button.

Note: If you have the Google toolbar installed, it may also be blocking pop-ups. You may need to modify both to allow PHRED's pop-ups to appear.



Printing


In order for the PHRED Reports to print correctly, the margins within Internet Explorer must be set to 1/2 inch and the Background Colors and Images print setting must be enabled. To set the **Margins** and **Background** to the correct printer settings:

- Start **Internet Explorer**.
- For Internet Explorer 7.0 & 8.0, select **File** in the top left corner. (If you do not see the **File** button, press **Alt** for the menu to appear.) From the drop down menu, select **Page Setup**.
- For Internet Explorer 9.0 - 11.0, click the **Tools**  button then click **Print**, then choose **Page Setup**.
- In the **Margins** section of the **Page Setup** pop-up, set both the **Left** and **Right** values to **0.5 inches**.
- Check the **Print Background Colors and Images** checkbox.
- Click **OK** to save the setting and close the **Page Setup** window.

Settings

Settings determine how often IE will go out to the PHRED server and get a new page. PHRED requires that you get a new page every time that you look at it.

To enable **Settings**:

- Start **Internet Explorer**.
- On the IE tool bar, select **Tools**  and then **Internet Options**.
- Under **Internet Options** select the **General** tab.
- Go to the **Browsing History** section and click the **Settings** button.
- Select **Every time I visit the webpage** under the **Check for newer versions of stored pages** title.
- Click **OK**.
- Click **OK** to close the **Internet Options** pop-up.

Firefox

In Firefox, select **Tools** at the top, and then select **Options**. Select the **Web Features** icon on the left-hand side of the window. You have the option to **Block Pop-up Windows**. Uncheck this option if you want to allow *all* pop-ups. If you would like to have all pop-ups blocked *except for* pop-ups from a specific site, check the option and then press the **Allowed Sites** button located on the right. Enter the address where PHRED 8D exists. This will allow pop-ups from the PHRED 8D website only.

Make sure both **Enable Java** and **Enable JavaScript** options are checked. Choose **Tools** then **Options**. Click on the **Content** icon. Check the **Enable Java** and **Enable Java Script** boxes.

Select the **Privacy** icon on the left-hand side of the window. Under Cookies, make sure **Allow Sites to set Cookies** is checked. Click **OK** at the bottom of the **Options** window.

Save Reset Help Cancel

Registration System Search

Update Your Preferences and then Save your changes.

User ID: MonicaSto093971
 * E-mail: monica@phredolutions.com
 Password: [masked] Verify Password: [masked]
 Only enter your Password when you intend to change it.

* First Name: Monica
 Middle Name:
 * Last Name: Stout

* Location: Denver
 Area: Quality
 Work Process: Audit
 Work Activity: No Value Selected
 Country & Time Zone: U.S. MST GMT -7
 Job Role: Quality Inspector
 Phone Number: 2678844191

* Indicates required field.
 If you make changes that affect the page you were on when you clicked "Preferences", you will have to refresh that page before the changes will take effect.

Select your Location, Functional Area, Work Process and Work Activity for data entry on the problem.

Save Reset Help Cancel

Registration System Search

Update Your Preferences and then Save your changes.

Synchronization: Sync with Shared System
 Startup Screen: Home Page Library Problem ID 8D Report
 Special Qualifications: Administrator Super User

If you make changes that affect the page you were on when you clicked "Preferences", you will have to refresh that page before the changes will take effect.

Make sure you refresh the page you were working on when you clicked **Preferences** in order to see your changes.

Save Reset Help Cancel

Registration System Search

Update Your Preferences and then Save your changes.

Synchronization: Sync with Shared System
 Search Criterion: Basic Advanced
 SRPP: 12 (SRPP: Search Records)
 Default Values: Problem ID 8D
 * Location: Denver
 Area: Quality
 Work Process: Audit
 Work Activity: All
 Problem Owner: Stout, Monica
 Status: Open Closed
 Search Date: Start Date Closed Date
 From Date: 01/01/1999 (mm/dd/yyyy) To Date: []

If you make changes that affect the page you were on when you clicked "Preferences", you will have to refresh that page before the changes will take effect.

Search Preferences determine the default values you would like to set for the Library and Reports screens. You can change these values on a one time basis on the Library & Reports screens, or change them permanently here.

Set default information here. These selections will be searched for automatically when you open the Library & Reports screens.

Tech Support

Press Tech Support to send an e-mail to an expert. Experts are listed, along with their area of expertise.

Preferences

Once you are registered, a link to user **Preferences** is available in the upper right hand corner of each screen. The following tabs are available in the Preferences window.

Registration Preferences

Click on the **Registration** tab to change the default settings for the Location, Area, Work Process and Work Activity.

If you save your Location, Area, Work Process, Work Activity or Country & Time Zone on the Registration Preferences page, the information that you chose will automatically populate the corresponding fields when you open a new Problem Identification or 8D. You may also change these values on a one-time basis when you enter a new Problem Identification or 8D, but they will revert to your default Preferences when you start a new Problem Identification or 8D. If you would like to change your default information permanently, do it in the Preferences window.

Once you select **Save** you will be shown the **Preferences Review** screen. You may select either **Accept Preferences** to save changes and return to the calling screen or **Revise Preferences** to return to the previous screen. If you make changes that affect the page you were on when you clicked **Preferences**, you will need to refresh that page before the changes will take effect.

System Preferences

Click on the **System** tab to set-up your system preferences.

Set the **Startup Screen** to the screen you would like to start on when you log in. The Home page is the default Startup screen, until it is changed in System Preferences.

If you have been assigned any **Special Qualifications** (Administrator or Super User), they are listed here.

Once you select **Save** you will be shown the **Preferences Review** screen. You may select either **Accept Preferences** to save changes and return to the calling screen or **Revise Preferences** to return to the previous screen. If you make changes that affect the page you were on when you clicked **Preferences**, you will need to refresh that page before the

changes will take effect. Please be aware that changes made to the system preferences on the shared system will only be implemented for the shared system.

Search Preferences

When you set your Preferences on the Search tab, the default values will be searched for each time you enter the Library or Report screens. You may change the default values at any time by selecting **Preferences** from any screen. Once you select **Save** you will be shown the **Preferences Review** screen. You may select either **Accept Preferences** to save changes and return to the calling screen or **Revise Preferences** to return to the previous screen. If you make changes that affect the page you were on when you clicked **Preferences**, you will need to refresh that page before the changes will take effect.

Note: You may also change these values on a one-time basis on the Library or Reports screens, but they will revert to your Default Values when you re-enter the screen. If you would like to change the preferences permanently, do it here.

Select **Basic** or **Advanced Search** criterion, depending on the complexity of the searching that you normally do.

Choose how many records you would like displayed on the Library and Reports screens with the **SRPP** (Search Records per Page) function.

The Library & Reports screens automatically show **Problem Identifications** and **8D's**. You can leave the default, or set it up to display one or the other.

The **Location**, **Area**, **Work Process** and **Work Activity** drop down boxes let you choose your default settings for the Library & Reports screens. **All** is the default, which is the broadest search option. This also applies to **Problem Owner**.

Select the **Report Type** that you typically run. This determines the type of report that is generated when you select a problem. Remember, these options may be changed on the Library and Reports screens on a one time basis, but will not become permanent defaults unless they are changed in User Preferences.

You can set your defaults to show problems that are **Open**, **Closed**, or both.

If you would only like to see problems in a specific date range, enter those dates in the **From Date** and **To Date** fields. Set your **Search Date** value to search for either **Start Date** or **Closed Date**.

The current user may modify their user preferences.

Please be aware that changes made to the search preferences on the shared system will only be implemented for the shared system.

Log Off

Click on Log Off, located in the upper right hand corner of every page to log off the system and return to your web browser home page.



Screen: Problem Identification
Attachments

Assign a **Description** for this attachment

Description:

Make visible to: CC (Controlled Country)

When you make an attachment visible to individuals of a Controlled Country it is your responsibility to assure that this action complies with Company's policies regarding sharing of Classified information, export of Controlled Technology, and protection of Intellectual Property.

Select a file to attach to this investigation using the **Browse** button, and then click the **Add** button.

These file name characters will be replaced with underscores (_) when this file is imported into the system: ' , ' + , % , ~ , space , # , & , @ , = , and \$.

Press **Browse** to find the file you would like to attach to this screen.

Current Attachments

Problem Identification Screen Only **All Screens**

Sort By: File Name Screen

(Rec, File Name, Screen Name, Description, Date Attached, Attached By, CC)

1. P_211_Chart.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	Remove
2. P_211_Digital_Drawing.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	<input type="button" value="Edit"/>
3. P_211_Digital_Drawing3.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	
4. P_211_Digital_Drawing4.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	
5. P_211_Drawing.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	
6. P_211_Drawing5.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	
7. P_211_Drawing7.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	
8. P_211_Picture6.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	
9. P_211_Picture7.jpg, Problem Identification, , 11/3/2010, M.Stout, Yes	

Attachments Review Page

Select the File Name to view an Attachment.

Screen Name	Description	Attached By
Attachment		
Problem Identification	Hand Drawing of Battery	M.Stout
P_211_Digital_Drawing3.jpg		
Problem Identification	Drawing of problem from engineering	
P_211_Drawing.jpg		
Problem Identification	Chart of Repeats	
P_211_Chart.jpg		
Problem Identification	Drawing from Clint Genny	
P_211_Digital_Drawing.jpg		
Problem Identification	Photo of top of battery BT99822	M.Stout
P_211_Picture6.jpg		
Problem Identification	Digital Drawing of other type of similar Battery (BT99825)	M.Stout
P_211_Digital_Drawing4.jpg		
Problem Identification	Photo of side of battery BT99822	M.Stout
P_211_Picture7.jpg		

Attachments are attached to individual screens inside a problem. The Attachments Review screen shows which screens have attachments and who attached them. You can click on the attachment to view it.

Left Column Functions

The following links are available on the left hand side of each screen.

Attachments

Press the **Attachments** link to add Reference Files to a screen within a problem. Most data-entry screens allow the addition of Attachments. You can view attachments for the current screen only or view all the attachments for the entire problem by clicking **Change Mode**.

For security reasons, the following file types are not able to be attached to problems: .ax, .bat, .bpl, .com, .cpl, .dll, .drv, .exe, .inf, .ini, .mdb, .ocx, .sys, .tsk. The PHRED system Administrator may add other types.

When the host adds an attachment, they can choose to share that attachment with the supplier or not. If the host has not chosen to share the file with suppliers, it will not appear on the list.

Adding Attachment Files

Enter a description of the attachment, then click Browse. A window will open where you can choose the file you wish to attach from the documents on your desktop. Then press the **Add** button to move the file to the **Current Attachments** window below. Press the **Close** button to save the Attachment. Notice that upon returning to the calling screen, the Attachment tab is now highlighted.

Removing, Reviewing and Editing Attached Files

To **Remove** a file, select the attachment you would like to remove by highlighting the full path name in the **Current Attachments** section. Press **Remove**. Click **Review** to display a list of attachments in a popup window. You will be able to view and, depending on the type of file, edit the file. This may vary depending on applications installed on your PC. Only some files can be modified, see the list below.

- Opens and allows modification: MS Word, MS Excel, MS Access, Visio, WinZip, MS Publisher, Adobe Photoshop
- Slide show view only: MS PowerPoint
- View Only: Text, .jpg, .gif, .html, Adobe .pdf

Once a file has been attached, you can **Edit** the description by highlighting the attachment in the **Current Attachments** box and clicking **Edit**.

When a user tries to add a file that was previously attached, the user will receive a warning message.

PHRED SOLUTIONS

History Report for Problem 920

Friday, January 21, 2011 11:46:55 AM (MST)

Event	Action
1	Demoted on 1/21/2011 at 11:29 AM from PHRED8DShared, PID 1300 8D, to PHRED8D, PID 920 8D by Monica Stout.
2	Promoted on 1/21/2011 at 11:36 AM from PHRED8D, PID 920 8D, to PHRED8DShared, PID 1310 QC by Avishek Uprety.
3	Promoted on 1/21/2011 at 11:36 AM from PHRED8D, PID 920 8D, to PHRED8DShared, PID 1320 QC by Avishek Uprety.

Screen: MtgMinutes
Meeting Minutes

You may either enter the minutes for a new meeting, or edit/review the minutes from a previous meeting.

Meetings:

Edge Strips - 12/15/2010

Our second meeting about the product vendor - 12/22/2010

* Meeting Title:

Date: Attendees:

Meeting Minutes:

We agreed to discontinue the use of product number #DFN8471 because of the problems it is causing on line #34

* Indicates required field.

Notes Review Page

Select the Screen Name value to edit or delete a Note.

Screen Name
Note
Problem Details
Call Hank in maintenance
Temp CM
please send details with data for meeting tomorrow in kl
Verification and Evidence
This needs data come and see me

Enter/Update Note

please send details with data for meeting tomorrow in kl

History

The **History** button on the left hand side of the page allows you to see the history of the current problem. The History report will tell you if the problem has been **converted** from a Problem Identification to an 8D. It also lists the time, date, and the user who converted it.

Meeting Minutes

Add minutes from meetings that pertain to this problem, or view previously added meeting minutes. The **Mtg Minutes** link is highlighted when there are meeting minutes recorded for that problem.

The **Meeting Title** is the only required field. After the title is entered, the **Save** buttons will be enabled. Press **Save** to save the data and exit from this screen. Press **Save/Recall** to save the data and remain on this screen. **Help** provides you with explanations of the functions on the screen. Press **Reset** to clear all the information entered on the screen prior to the last save.

Edit and **Review** will only be enabled after you highlight the Meeting Title listed in the Meetings box. **Edit** will allow you to make the required modifications to the selected meeting minutes. After making changes to the meeting minutes, press **Save/Recall** to save and review the changes. **Review** will generate a Meeting Minutes Report for the Meeting Title that is selected.

The **Meeting Minutes** field can hold up to 4,000 characters so you can write a novel about the meeting, if you wish.

If the problem was discussed via e-mails, copy the findings and paste them into the meeting minutes field.

Notes

Press **Notes** to access a pop-up screen in which you may enter comments relative to the current screen content. Click **Save** when you have finished entering text. The Notes tab is highlighted in yellow when the Notes pop-up contains information. Notes can be modified or deleted on the individual screens.

To review all of the notes for a problem, press **Review** on the Notes pop-up and a report will be generated that includes any Notes that were added to this problem. It will tell you what screen they are from and show you that note's text. Click on the link in the report to access the Note and edit it.

[View PDF Report](#) [Print](#) [Close](#)

PHRED SOLUTIONS

PID: 160 QAN 8D PHRED8D_Shared Friday, April 27, 2012 12:06:18 PM (MDT)

Problem Identification

Title (D2): Flange 8877 on edge strip breaks during installation of light truck doors

Converted on 4/25/2012 at 12:19 PM from PID 160 ID to PID 160 8D

Occurrence: Date: Time:
Time Zone:

Initiated By: Leonard John Sparks, Date: 4/25/2012
Last Updated By: Chris Topher, Date: 4/26/2012

Host Problem Owner: Leonard John Sparks
Supplier Problem Owner: **Chris Topher**

Mfg Site: No Value Selected Business Unit: Allentown Project Name: Operations

Work Process: Assembly Work Activity: Cell 1, Shift 2

Tracking Data: (System: Host Default)

Product description: jkjjkkjjkkjl

List Projects if Multiple:

Is this a repeat issue?: No Production date: 4/30/2012

Factory detection point: None

Is a failure sample available?: Yes Part Number: PH67543

Team Members: Leonard John Sparks, and Chris Topher

Problem Description

Problem Statement (What seems to be the problem?)(D2)
Edge Strip breaks during installation on light truck doors on models XLT & PDQ

What is actually
1. Inner strip split
breaks when inst
on the performan

Where does it ha
Door assembly s

Who is involved?
Operators of Stri
Manufacturers/Sup
Group Leaders 1

Temporary C
Summarize the T

Increased shipm
station between t

When was the co
Date: Time: Ti

[View PDF Report](#) [Print](#) [Close](#)

PHRED SOLUTIONS

Revisions Report for Problem 556

Friday, January 21, 2011 12:05:52 PM (MST)

Event	Cur Type	User	Screens	Action	Log Times
1	8D	Monica Stout	Problem Identification	Open	2010-12-09 16:14:23.0
30	8D	LAURIE RAMBAUD	Problem Identification	Save	2010-12-14 09:42:24.0
31	8D	Monica Stout	Pick Possible Cause	Save	2010-12-14 09:46:27.0
32	8D		Permanent CM	Save	2010-12-14 09:47:52.0
33	8D		Close	Save	2010-12-14 09:48:57.0
40	8D	Nick Rennie	Problem Identification	Save Action	2010-12-14 10:48:06.0
41	8D	Monica Stout	Temp CM	Save	2010-12-15 09:49:45.0
42	8D		Permanent CM	Save	2010-12-15 21:35:15.0
43	8D		Pick Possible Cause	Save	2010-12-17 15:50:06.0
64	8D	Avishek Uprety	Close	Save	2011-01-11 16:31:17.0
65	8D		Close	Save	2011-01-11 16:31:27.0
66	8D		Close	Save	2011-01-11 16:32:11.0
73	8D		Close	Re-opened	2011-01-11 16:34:20.0
74	8D	Monica Stout	Problem Identification	Save	2011-01-19 12:31:23.0
75	8D		List Possible Cause	Save	2011-01-19 12:33:40.0
76	8D		List Possible Cause	Save Action	2011-01-19 12:33:40.0
77	8D		Prevention	Save	2011-01-19 12:34:14.0
78	8D		Prevention	Save Action	2011-01-19 12:34:14.0
79	8D		Permanent CM	Save	2011-01-19 12:35:14.0
80	8D		Permanent CM	Save Action	2011-01-19 12:35:14.0
81	8D		Permanent CM	Save	2011-01-19 12:35:28.0
82	8D		Permanent CM	Save Action	2011-01-19 12:35:28.0

[View PDF Report](#) [Print](#) [Close](#)

Report

Click the Report link from any screen inside a problem to generate a report about that problem. The Report will contain any information that you have entered and saved.

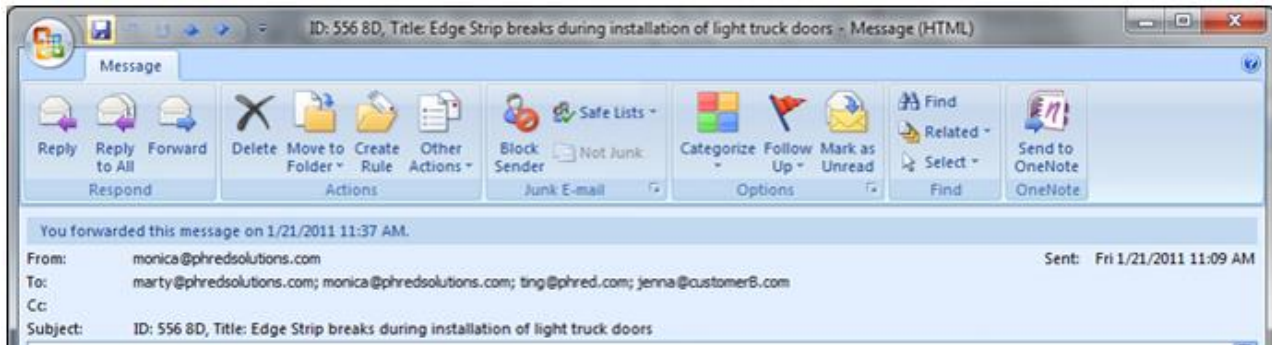
Questions that have not been answered will be blank.

Note: The Attachments are hyperlinked. Click on the link and if you have the software required to open the attachment, it will appear in a separate window.

Revisions

This report shows revisions made by specific users for the current problem. Revisions are sorted by user, and include the screens visited and the log time and date. This report is helpful when you want to track how a specific person is using the system. You can access the Revision Report for any problem by clicking on **Revisions** on the left side of any screen inside a problem.

Note: Administrators can view revisions by user across problems over time in the System Statistics Section. See the Administrator Guide for more details.



Problem Statement: Edge Strip breaks during installation on light truck doors on models XLT & PDQ
 Location : Shanghai, Area : Not Selected
 Work Process : Assembly, Work Activity : Cell 2, Shift 1
 Click the Problem ID to access this problem: [556 8D](#)

Hello A
 contact
 will wo
 Please
 Respect
 Monica
 E-mail:
 Phone:
 If you
 sender
 PHRED C
 Confide
 sole us
 client
 distrib
 the ser

Create E-mail Message

Send Close Help

You must either select the colleagues you wish to send an E-mail to from the list on the left below, or enter their names in the **Enter E-mail addresses ...** text box before the **Send** button becomes active. Once you have chosen/entered all the names, entered a message, etc., and click **Send** to mail the message.

Select name(s) and press Add.	E-mail addressee(s)
brother, Avi; n/a Cabrera, Paulina; Prod. Supervisor Carrero, Liz; Quality Manager Cerda, Ricardo; Prod. Supervisor Chacoz, Jorge; n/a Chen, Mei; n/a Chopra, Amit; QA Supervisor Coquinati, Marco; n/a Das, Rahul; Ops Manager Diego, Orla; Prod. Supervisor Doce, Antonio; QA Supervisor Eckberg, Lars; n/a	Dirsch, Marty; Team Mbr; n/a Huang, Ting; Team Mbr; n/a Stout, Monica; Team Mbr; n/a

(Hold down the Ctrl key while selecting names in order to add more than one name.)

Enter additional E-mail addresses below, separated by semi-colons. Send a copy to myself

Additional addresses:

Subject:

Add your **Personal Message** to the following default information:

Problem Statement: Edge Strip breaks during installation on light truck doors on models XLT & PDQ
 Location : Shanghai
 Area : Not Selected
 Work Process : Assembly
 Work Activity : Cell 2, Shift 1
 Click the Problem ID to access this problem: ID [556 8D](#)

Personal Message:

Hello All,

We are almost finished working through this problem.

Jenna - We will contact you when everything is complete and we have figured out a solution that will work best for you.

Thank you,

Monica Stout

Send Close Help

Send E-Mail

The **Send E-Mail** function allows you to send an email to team members and people outside of your organization.

If you want to e-mail someone on the team or someone within your organization, click on their name then click **Add**. This will move them into the **E-mail Addressee(s)** box on the right. You can add as many recipients as you want. If you want to remove a recipient from the E-mail Addressee(s) box, highlight their name then click **Remove**.

To add recipients that are outside of your organization, enter their full e-mail address in the **Enter E-mail Addresses Below** text box. You can add as many recipients as you want, separated by semi-colons.

The Subject of the e-mail automatically includes the Problem ID number and the Problem Title when you open the Send E-mail window. You can change the Subject to anything you want at any time before clicking Send.

Check **Send a copy to myself** to receive a copy of the email message.

The body of your e-mail will always include the following default information:

- Problem Statement
- Location
- Area
- Work Process
- Work Activity
- A Hyperlink directly to the Problem (Note: this hyperlink is only enabled if the recipient is the Problem Owner or a Team Member on that problem.)

You can also add a **Personal Message** to your e-mail. The maximum length of the personal message is 32,000 characters.

Once everything is filled out, click **Send** to send your e-mail. Click **Close** to close the window without sending your message.

Team Members

Screen: TMPopUp

Last Name Search:

Select one or more colleagues to become team members, and then click 'Add'. (D1)

Team Groups:

Select one or more colleagues to become team members, and then click 'Add'. (D1)

- 1.Adams, Jonathan David : PHRED : n/a
- 2.Anderson, Dave : PHRED : n/a
- 3.Anderson, Jon : PHRED : n/a
- 4.Armigliato, Antonio : PHRED : Quality Manager
- 5.Baetzel, Steffen : PHRED : n/a
- 6.Ball, Lonnie : PHRED : Senior QE
- 7.Beckschulte, Sebastian : PHRED : n/a
- 8.Beckwith, Thomas : PHRED : n/a
- 9.Bone, Mary Ann : PHRED : Lead MLS
- 10.brown, richard : PHRED : n/a
- 11.Campbell, Ronald E. : PHRED : Engineer - R&M

Team Members			
Name : Company : Job Role	Full	Read Only	Active
1. Goldson, John : SupplierF : process eng	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
2. Timmer, Erica : SupplierF : Manf Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
3. Burgrave, Eugene : PHRED : n/a	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
4. Stout, Monica : PHRED : QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

The Team Members list on the Problem ID page will not show the new Team Member(s). You will have to refresh that page to see them. Before refreshing the Problem ID page, MAKE SURE you have saved any changes you made, or you will lose them.

Add all new Team Members before changing individual parameters. Changes to individual parameters are not saved until the 'Save' button is clicked.

HELP - Windows Internet Explorer

You must enter data in the required fields, designated by an asterisk, in order to save this page.

Save/Next saves the information that you have entered and moves you to the next step in this problem solving process.

Cancel returns you to the previous screen.

Save/Recall saves the information that you have entered and returns you to this screen. This is helpful if you want to add Actions to this screen before moving on.

Problem Identification

Close Print

How Do I Navigate?

This is an example of a Help popup screen.

Action Description

Once **Team Members** have been designated and this screen has been saved, you may enter Action Descriptions that pertain to this screen. A **Responsible** person must be selected in order to enable the **Send Email** checkbox. The **Responsible** drop down list will include only **Team Members** of this problem. On initial entry of an Action Description an email will automatically be generated. Once a **Completion Date** has been entered the **Status** will change to **Closed** automatically.

COACH - Windows Internet Explorer

All Problems now begin with a Problem Identification screen.

The purpose of the Problem Identification screen is to identify and categorize a problem. Not to describe it fully; that happens on the next page.

Data entered in the **Title** field displays on the top of every page. The Problem Title should be a short, concise statement of the problem. The field is limited to 100 characters, so just describe the 'big picture' of the problem. You will describe the problem in great depth on the next page.

Problems are categorized by **Location**, **Functional Area**, **Work Process** and **Work Activity**. By indicating where the problem occurred as closely as applicable, it can easily be searched for in the **Library** and in **Reports**. If the problem occurs across the organization, select only the **Location**, but if it is only involves a single work process, select a value in all four of the fields (Location, Functional Area, Work Process and Work Activity).

This is an example of a Coach popup screen.

...king Data section, someone in your organization at kind of problem related data elements would be ul to track. If you think it would be helpful to add a few ing fields, talk to the PHRED System Administrator

Team Members

You can add team members to the current problem by clicking on this link. The **Host** and **Supplier Problem Owners** and the user currently logged into the PHRED 8D Problem Solving system are automatically added as Full Team Members. Therefore, you will not see those names on the list of colleagues to add as Team Members.

Select one or more colleagues from the upper box and press **Add** to move them to the **Team Members** section. Each Team Member can be assigned as **Full** or **Read Only**. Full Team Members have both read and write access to the problem. Read Only Team Members do not have write access to a problem; they can only see the problem report and have Actions assigned to them.

Each Team Member is automatically entered with **Active** status. Team Members cannot be deleted, so by removing the checkmark from the **Active** checkbox, a Team Member can be made inactive. This means that they can read the problem report, but they cannot be assigned any actions and are no longer part of the team.

Add all new Team Members before changing the individual parameters at the bottom of the Team Members pop-up screen. Changes to individual parameters are not saved if you add an additional Team Member prior to pressing the **Save** button.

Team Groups are a pre-defined group of users who often work together on problems. By selecting a group on the Team Groups select box then clicking '**Add**' all members of that pre-defined group will be added to the team. The team Member list on the bottom of the page will immediately be updated and saved.

You can search for team members using the Last Name Search field and clicking Search.

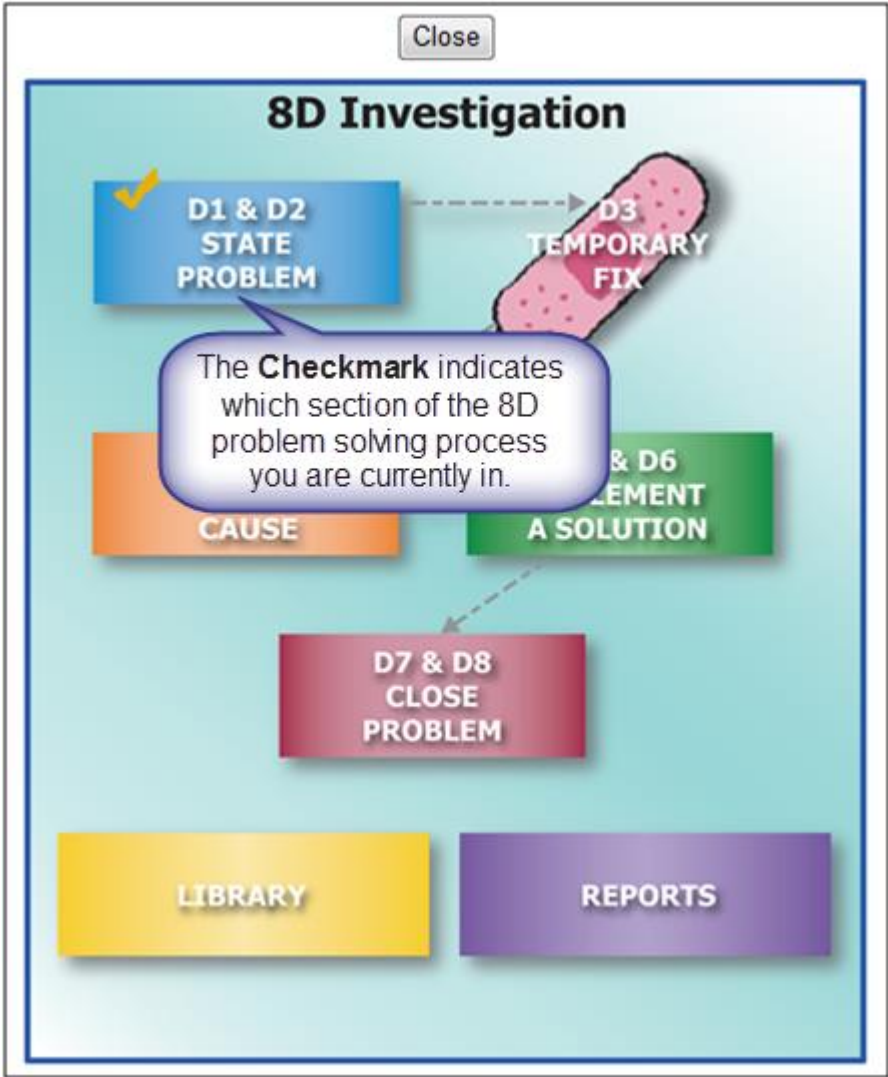
Close closes this window and returns you to the calling screen.

Help

Help provides you with explanations of the various functions on the screen. Each screen has its own specific Help information. Help appears in a pop-up box over the screen that you are working on. You can access the Help pop-up screen by clicking **Help** on the left side of the screen.

Coach

Coach provides you with specific hints on how to answer the questions. Each screen in the problem solving process has its own specific coaching information. Coaching appears in a pop-up box over the screen you are working on. You can access the Coach pop-up screen by clicking **Coach** on the left side of the screen.



Where am I?

The **Where Am I?** link, when clicked from an 8D, will display a map of the problem solving process, with a check mark to indicate which step you are currently working on. In the example, the user is in the State Problem section.

If the **Where Am I?** link is clicked from the Home Page, Library, or Reports screens, the map shows the whole PHRED 8D Problem Solving system.

ID	Action Description	Due Date	Status	Completion Date	Send Email	Delete
	Responsible (PID 160 8D Team Members only)		Last Updated By	Type	Sub-Type	
1.	Analyze return hold collection data to see what the average volume of edge strip breaks over the last 2 years Tophier, Chris : Supplier One : n/a data analysis attached	4/29/2012	Closed	5/8/2012	<input type="checkbox"/> Send Email	<input type="checkbox"/> Delete
2.	notify final inspection about change to specification SP5647 Tophier, Chris : Supplier One : n/a	4/30/2012	Open	5/4/2012	<input checked="" type="checkbox"/> Send Email	<input type="checkbox"/> Delete

Note: You must select a Responsible person to enable the Send Email checkbox.

PHRED SOLUTIONS Other Actions

Friday, April 27, 2012 12:14:01 PM (MDT)

ID: 160 8D Problem Title: Flange 8877 on edge strip breaks during installation of light truck doors

Screen Name

ID	Action Description	Status	Due Date	Completion Date
		Responsible	Type	SubType
		Last Updated		Edit
	Completion Comment			
Screen Name: Temp CM				
1.	Add a quality station between the receiving area and bins 28 and 29.	Closed	5/1/2012	5/4/2012
		Chris Tophier	Investigative	Data Analysis
		By: Chris Tophier Date-Time: 4/28/2012-16:40		<input type="button" value="Edit"/>
2.	Increased shipments to make up numbers.	Closed	5/1/2012	5/8/2012
		Chris Tophier	Preventive	Process Change
		By: Chris Tophier Date-Time: 4/28/2012-16:40		<input type="button" value="Edit"/>
Screen Name: Permanent CM				
1.	look over specs on part number G558	Open		
		Chris Tophier	Corrective	Validate
		By: Chris Tophier Date-Time: 4/26/2012-17:35		<input type="button" value="Edit"/>

Action Description

Action Descriptions appear on most data entry screens, and apply to that specific screen. An Action Description section will appear on the Problem Identification page once **Team Members** have been designated and the screen has been saved. You may then enter Action Descriptions that pertain to this Problem Identification screen. A **Responsible** person must be selected in order to enable the **Send Email** checkbox. The **Responsible** drop down list will include only **Team Members** of this problem. On initial entry of an Action Description an e-mail will automatically be generated.

Once a **Completion Date** has been entered the **Status** will change to *Closed* automatically.

Suppliers can only see actions that are marked visible to them. Host owners can mark their actions 'Visible to Host Only' so that the supplier can only see some actions for a particular problem.

Press **Add Action** to add an additional Action Description.

Add Action

Press **Add Action** to add an additional Action.

All Other Actions

Press **All Other Actions** to display all actions recorded for this problem. You may modify individual actions from this report by pressing the **Edit** button.

8D PROBLEM SOLVING

PHRED8DShared

User: Ann Lim
Library
Home Problem Identification 8D **Library** Reports
Browser Setup Tech Support Preferences Log off

Whole
 Problem Statement Only
 Title Only
 Both
 ID Number Only
 Verity Search
 Verity Search Areas:

All Areas
 Actions
 Countermeasures - FI/FA - Tracking Data
 Notes - Mtg Minutes

Problem Identifications
 8D's
 Records Per Page:

Mfg Site:

Location:
 Host Owner:

Supplier Owner:
 Share with: SupplierB

Status: Open
 Closed
 Search Date: Start Date
 Closed Date
 From Date: (m/d/yyyy)
 To Date:

Click on the Column Header to sort by that column.
 Primary Owners are indicated in Red.
 8 records meet the search criteria.

ID	Status	Start Date	Closed Date	Title	Mfg Site	Supplier Owner	PHRED Owner	Location Area
01570 ID	Open	11/28/2017		8877 bent in insulation .	Beltsville	Ann Lim, SupplierB	Nick Rennie	BANG - Quality
01550 8D	Open	5/4/2015		flange 8877 won't stay in place.	Cleveland	Ann Lim, SupplierB	Monica Stout	ALLEN - Maintenance
01530 8D	Open	2/14/2015		Gear dimension out of spec	Minneapolis	Laurie Crocker, SupplierB	Monica Stout	IND - Operations
				Demoted on 2/14/2014 at 2:25 PM from Shared, PID 1530 8D, for PHRED to PHRED, PID 991 8D .				
01490 8D	Open	6/2/2015		Flange 8877 on edge strip breaks during installation of light truck doors	Charlotte	Ann Lim, SupplierB	Nick Rennie	CINC - Operations
01480 8D	Open	5/28/2015		Material Quality of Sheet Metal is below standard	Charlotte	Ann Lim, SupplierB	Laurie RAMBAUD	Chat - Quality
01200 8D RO	Closed	5/13/2015	6/5/2015	sump pump SP1233 does not drain properly.	Minneapolis	Jack Greene, SupplierB	Avishek Uprety	CINC - Operations
00750 8D RO	Closed	4/2/2015	4/18/2015	Diff Lock valve is not sealed tightly enough for machine, valve number K7411.	Cleveland	Greg Zhang, SupplierB	Nick Rennie	SHANG
00600 8D RO	Closed	2/27/2015	3/1/2015	Gromet Unseated in Left Flange Lock.	Conover	Ann Lim, SupplierB	Avishek Uprety	ALLEN - Operations

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Chapter 6 – Library

The Library page lets you search for and modify problems. If you do not have access to modify the problem, you will be shown a Problem Report when you click the problem and the ID number will be shown in maroon.

You have a choice of either **Basic Search** or **Advanced Search**. The Basic/Advanced Search toggle button allows you to change the display of the Library screen, either hiding or showing the advanced search criterion.

You can change your **Preferences** so that when you open the Library page, the search criteria already defaults to the information that you look at most. For example, you can change your Preferences so that as soon as you get to the Library screen, only *Open* problems from the Chicago Location are shown.

To change your preferences, click **Preferences** in the top right area of the screen. Then, click the **Search** tab inside the Preferences window. The Search tab accounts for the default settings on *both* the Library and the Reports screens, so your default settings will always be the same for both screens.

Remember, these options may be changed on the Library screen on a one time basis, but will not become permanent defaults unless they are changed in your user Preferences. On the **Search** tab, you can choose between the following default search options that will appear on the Library and Reports screens:

- **SRPP** (Search Records per Page): Choose how many records per page you would like displayed
- **Problem Identifications** and **8D's**: You can leave the default, or set it up to display one or the other
- Choose the **Location**, **Area**, **Work Process**, **Work Activity** and **Problem Owner** that you want for your default settings. 'All' is the default, which is the broadest search option.
- You can set your defaults to show **Open** problems, **Closed** problems, or both.
- If you would only like to see problems in a specific date range, enter those dates in the **From Date** and **To Date** fields. Set your Search Date value to search for either Start Date or Closed Date.

Reset changes all Search parameter fields back to the user's default values.

Select a Problem

To select a problem, click on the Identification Number (**ID**). When you click on the ID you will move to the first screen for that problem. The ID is displayed in blue if the problem is accessible for modification. When you hold the mouse over the ID you will see the "hand" pointer.

If the **ID** is displayed in maroon, the problem is NOT accessible for modification. When you click on the ID of a problem that is not accessible for modification a report will be generated.

If a problem has a status of **Closed** it can be re-opened for modification by either the supplier or host owner. All other users will only see a report.

If you see the letters **8D** next to the ID number the problem is an **8D**. The letters **ID** denote a **Problem Identification**. The letters **RO** located beneath the ID number indicate the problem is **Read Only**.

Basic Search

When you are in the **Basic Search** mode, there are a few options to narrow down your search results. If you are searching for something more specific, you will want to change to the Advanced Search mode by clicking the **Advanced Search** button. You can easily change back to Basic Search by clicking the **Basic Search** button.

Enter the text you would like to search for in the **Keyword** field then click **Search**.

If you uncheck the **Whole Word** field, you will be able to search for your keyword even if it is inside of another word. For example, you may be searching for all problems with “batteries.” This can be tricky because the problem may say “battery” or “batteries,” so by unchecking the Whole Word field and searching for “batter” your results will contain problems with both “batteries” and “battery.” If you leave the Whole Word field checked, your results will only include that exact occurrence of the word. So, for example, by searching for “batter” when the Whole Word field is checked your results will only include problems that actually say “batter” surrounded by spaces.

If you select:

- **Problem Statement Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Problem Statement will be displayed.
- **Title Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Title will be displayed.
- **Both**, enter a **Keyword**, and press **Search**. Only problems with that keyword in *BOTH* the Problem Statement *AND* the Title will be displayed.
- **ID Only**, enter a numeric keyword, and press Search. The Problem with the Problem Identification number you entered will be displayed.

You may choose to search for **Problem Identifications**, **8D's**, or both by placing a check in the respective check boxes.

By choosing **Verity Search**, you can narrow your search results further so that you only search in specific areas inside of the problem. You can choose the area that you would like to search in the **Verity Search Areas** select box. Hold the Control key to choose more than one Verity Search Area. For example, with Verity Search you can find which problems have **Actions** that contain a specific part number. Or, you could search for **Possible & Root Causes** that contain the word “engineering design.”

The **Records Per Page** drop down box allows you to specify the number of records you would like displayed on the screen. Press **Next** at the bottom of the page to get to the next page of records.

Click on any **Column Header** to sort problems by that column. Click on the **Column Header** again to sort in the opposite order.

Click **Reset** to change all Search parameter fields back to the user's default values.

Advanced Search

The **Advanced Search** will help you narrow your search results further so that you can find very specific problems. You can combine any number of the search criteria. For example, you can search for all Open problems in the Maintenance area of the Chicago location between March and June of 2018. Click **Basic Search** if you would like to do a simple search.

If you select:

- **Problem Statement Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Problem Statement will be displayed.
- **Title Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Title will be displayed.
- **Both**, enter a **Keyword**, and press **Search**. Only problems with that keyword in BOTH the Problem Statement AND the Title will be displayed.
- **ID Only**, enter a numeric keyword, and press Search the Problem with the Problem identification number you entered will be displayed.

By choosing **Verity Search**, you can narrow your search results further so that you only search in specific areas inside of the problem. You can choose the area that you would like to search in the **Verity Search Areas** select box. Hold the Control key to choose more than one Verity Search Area. For example, with Verity Search you can find which problems have **Actions** that contain a specific part number. Or, you could search for **Possible & Root Causes** that contain the word “engineering design.”

By checking **Open** or **Closed**, you can choose to display only open problems, only Closed problems or both at the same time.

Enter a date range in the **From Date** and **To Date** fields to search for problems within that date range. You can specify the **Search Date** to be either the **Start Date** (the date the problem was logged in the PHRED 8D Problem Solving System), or the **Closed Date** (the date the problem status was changed to Closed).

The **Records Per Page** drop down box allows you to specify the number of records you would like displayed on the screen. Press **Next** at the bottom of the page to get to the next page of records.

Click on any **Column Header** to sort problems by that column. Click on the **Column Header** again to sort in the opposite order.

Click **Reset** to change all Search parameter fields back to the user's default values.

8D PROBLEM SOLVING

PHRED8DShared

User: Ann Lim | Reports

Home
Problem Identification
8D
Library
Reports

[Browser Setup](#) | [Tech Support](#) | [Preferences](#) | [Log off](#)

Search
Cancel
Reset
Prob Summary
Action Summary

Whole

Problem Statement Only
 Title Only
 Both
 ID Number Only

Verity Search

Verity Search Areas: All Areas

Report Type: Problem Report
 Actions
 Only Open Actions:

Included Sections:
 Actions
 Notes
 Attachments
 Mtg Minutes

<< Basic Search
 Problem Identifications
 8D's
Records Per Page: 12

Location: All
Host Owner: All
Mfg Site: All

Area: All
Supplier Owner: All
Share with: SupplierB

Status: Open
 Closed
 Search Date: Start Date
 Closed Date
 From Date: {m/d/yyyy}
 To Date:

Click on the Column Header to sort by that column.
 Primary Owners are indicated in Red.
8 records meet the search criteria.

ID	Status	Start Date	Closed Date	Title	Mfg Site	Supplier Owner	PHRED Owner	Location Area
01570 8D RO	Open	11/28/2017		8877 bent in insulation .	Beltsville	Ann Lim, SupplierB	Nick Rennie	BANG - Quality
01550 8D RO	Open	5/4/2015		flange 8877 won't stay in place.	Cleveland	Ann Lim, SupplierB	Monica Stout	ALLEN - Maintenance
01530 8D RO	Open	2/14/2015		Gear dimension out of spec	Minneapolis	Laurie Crocker, SupplierB	Monica Stout	IND - Operations
01490 8D RO	Open	6/2/2015		Demoted on 2/14/2014 at 2:25 PM from Shared, PID 1530 8D, for PHRED to PHRED, PID 991 8D . Flange 8877 on edge strip breaks during installation of light truck doors	Charlotte	Ann Lim, SupplierB	Nick Rennie	CINC - Operations
01480 8D RO	Open	5/28/2015		Demoted on 1/31/2013 at 7:00 AM from Shared, PID 1490 8D, for PHRED to PHRED, PID 1234 8D . Demoted on 1/24/2014 at 1:17 PM from Shared, PID 1490 8D, for PHRED to PHRED, PID 1003 8D . Demoted on 1/24/2014 at 1:19 PM from Shared, PID 1490 8D, for PHRED to PHRED, PID 1013 8D . Material Quality of Sheet Metal is below standard	Charlotte	Ann Lim, SupplierB	Laurie RAMBAUD	Chat - Quality
01200 8D RO	Closed	5/13/2015	6/5/2015	Promoted on 10/17/2012 at 2:16 PM from PHRED, PID 584 8D, for SupplierF to Shared, PID 1480 8D . Demoted on 10/17/2012 at 2:17 PM from Shared, PID 1480 8D, for PHRED to PHRED, PID 961 8D . Demoted on 10/25/2012 at 3:42 PM from Shared, PID 1480 8D, for PHRED to PHRED, PID 973 8D . sump pump SP1233 does not drain properly.	Minneapolis	Jack Greene, SupplierB	Avishek Uprety	CINC - Operations
00750 8D RO	Closed	4/2/2015	4/18/2015	Diff Lock valve is not sealed tightly enough for machine, valve number K7411.	Cleveland	Greg Zhang, SupplierB	Nick Rennie	SHANG
00600 8D RO	Closed	2/27/2015	3/1/2015	Gromet Unseated in Left Flange Lock.	Conover	Ann Lim, SupplierB	Avishek Uprety	ALLEN - Operations

Note: You can sort by any column by clicking on the column header. If you click the header once, the column will be sorted from A to Z. If you click the header a second time, the column will be sorted from Z to A.

Chapter 7 - Reports

If you wish to see all that is known about a problem on one screen, click the **Reports** tab to move to the Reports menu.

You have a choice of either **Basic Search** or **Advanced Search**. The Basic/Advanced Search toggle button allows you to change the display of the Reports screen, either hiding or showing the advanced search criterion.

You can change your **Preferences** so that when you open the Reports page, the search criteria already defaults to the information that you look at most. For example, you can change your Preferences so that as soon as you get to the Reports screen, only Open problems from the Chicago Location are shown.

To change your preferences, click **Preferences** in the top right area of the screen. Then, click the **Search** tab inside the Preferences window. The Search tab accounts for the default settings on both the Library and the Reports screens, so your default settings will always be the same for both screens.

Remember, these options may be changed on the Reports screen on a one time basis, but will not become permanent defaults unless they are changed in your user Preferences. On the **Search** tab in Preferences, you can choose between the following default search options that will appear on the Library and Reports screens:

- **SRPP** (Search Records per Page): Choose how many records per page you would like displayed
- **Problem Identifications** and **8D's**: You can leave the default, or set it up to display one or the other
- Choose the **Location**, **Area**, **Work Process**, **Work Activity** and **Problem Owner** that you want for your default settings. 'All' is the default, which is the broadest search option.
- You can set your defaults to show **Open** problems, **Closed** problems, or both.
- If you would only like to see problems in a specific date range, enter those dates in the **From Date** and **To Date** fields. Set your Search Date value to search for either Start Date or Closed Date.

Reset changes all Search parameter fields back to the user's default values.

Problem Report

Here you can view the whole of an individual problem in an easy to view format.

To view a specific problem report, next to Report Type, choose Problem Report then click on the ID number (**ID**) of the problem. The report appears in a pop-up window.

Actions Report

To view only the actions that were assigned to a specific problem, next to **Report Type** choose **Actions Report**. Then, if you click on a Problem Identification number (**ID**), a report with that problem's actions will be generated. You may also elect to display **Only Open Actions**. This will limit the report to only include Actions that have not been closed. If the search results return actions that have been assigned to you, you will have the ability to edit that actions.

Problem Summary Report

If you are interested in a summary of problems, press the **Prob Summary** button to display the **Problem Summary Report**. This report shows all existing problems and displays the Title, ID, Start Date, Status, Location, Area, Work Process, Work Activity and Problem Owner.

Action Summary Report

Press **Action Summary** to view the **Action Summary Report**. This report shows all Actions assigned to the problems selected on the Reports screen and displays the Problem ID, Title, and Screen Name to which the Actions are assigned, Status, Closed Date, the person Responsible for the Action, and the Action Description. If the search results return actions that have been assigned to you will have the ability to edit those actions. You will not be allowed to delete the actions. This functionality allows you to change actions without accessing the problem.

Excel SCAR

Click **Excel SCAR** to download the Excel SCAR report. Only the selected problems will appear on the Excel export. Each problem will have its own row. Once the file is downloaded, click the gray button on the bottom left of your screen to open it or go to the Downloads folder on your computer.

Excel Short

Click **Excel Short** to download the Excel Short report. Only the selected problems will appear on the Excel export. Each problem will have its own row. Once the file is downloaded, click the gray button on the bottom left of your screen to open it or go to the Downloads folder on your computer.

Excel All

Click **Excel All** to have the selected problems on the Search page exported to Excel. Each problem will have its own row where every field within the 8D is displayed. Once the file is downloaded, click the gray button on the bottom left of your screen to open it or go to the Downloads folder on your computer.

Basic Search

When you are in the **Basic Search** mode, there are a few options to narrow down your search results. If you are searching for something more specific, you will want to change to the Advanced Search mode by clicking the **Advanced Search** button. You can easily change back to Basic Search by clicking the **Basic Search** button.

Enter the text you would like to search for in the **Keyword** field then click **Search**.

If you uncheck the **Whole Word** field, you will be able to search for your keyword even if it is inside of another word. For example, you may be searching for all problems with “batteries.” This can be tricky because the problem may say “battery” or “batteries,” so by unchecking the Whole Word field and searching for “batter” your results will contain problems with both “batteries” and “battery.” If you leave the Whole Word field checked, your results will only include that exact occurrence of the word. So, for example, by searching for “batter” when the Whole Word field is checked your results will only include problems that actually say “batter” surrounded by spaces.

If you select:

- **Problem Statement Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Problem Statement will be displayed.
- **Title Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Title will be displayed.
- **Both**, enter a **Keyword**, and press **Search**. Only problems with that keyword in *BOTH* the Problem Statement *AND* the Title will be displayed.
- **ID Only**, enter a numeric keyword, and press Search. The Problem with the Problem Identification number you entered will be displayed.

Choose the **Report Type** you would like to see. You can view a **Problem Report**, which shows you the whole of an individual problem in an easy to view format. You can also view an **Actions** report, which will show all of the Actions that were created for a specific problem. By checking the **Only Open Actions** field, your Actions report will only include Open actions

You can choose to include or exclude specific parts of a Problem Report by checking or unchecking the **Actions, Notes, Attachments, or Mtg Minutes** fields.

You may choose to search for **Problem Identifications, 8D's**, or both by placing a check in the respective check boxes.

The **Records Per Page** drop down box allows you to specify the number of records you would like displayed on the screen. Press **Next** at the bottom of the page to get to the next set of records.

You can sort by any column by clicking on the **column header**. If you click the header once, the column will be sorted from A to Z. If you click the header a second time, the column will be sorted from Z to A.

By choosing **Verity Search**, you can narrow your search results further so that you only search in specific areas inside of the problem. You can choose the area that you would like to search in the **Verity Search Areas** select box. Hold the Control key to choose more than one Verity Search Area. For example, with Verity Search you can find which problems have **Actions** that contain a specific part number. Or, you could search for **Possible & Root Causes** that contain the word “engineering design.”

Click **Reset** to change all Search parameter fields back to the user's default values.

Advanced Search

The **Advanced Search** will help you narrow your search results further so that you can find very specific problems. You can combine any number of the search criteria. For example, you can search for all Open problems in the Maintenance area of the Chicago location between March and June of 2011. Click **Basic Search** if you would like to do a simple search.

If you select:

- **Problem Statement Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Problem Statement will be displayed.
- **Title Only**, enter a **Keyword**, and press **Search**. Only problems with that keyword in the Title will be displayed.
- **Both**, enter a **Keyword**, and press **Search**. Only problems with that keyword in BOTH the Problem Statement AND the Title will be displayed.
- **ID Only**, enter a numeric keyword, and press Search the Problem with the Problem identification number you entered will be displayed.

By choosing **Verity Search**, you can narrow your search results further so that you only search in specific areas inside of the problem. You can choose the area that you would like to search in the **Verity Search Areas** select box. Hold the Control key to choose more than one Verity Search Area. For example, with Verity Search you can find which problems have **Actions** that contain a specific part number. Or, you could search for **Possible & Root Causes** that contain the word “engineering design.”

Choose the **Report Type** you would like to see. You can view a **Problem Report**, which shows you the whole of an individual problem in an easy to view format. You can also view an **Actions** report, which will show all of the Actions that were created for a specific problem. By checking the **Only Open Actions** field, your Actions report will only include Open actions

You can choose to include or exclude specific parts of a Problem Report by checking or unchecking the **Actions, Notes, Attachments, or Mtg Minutes** fields.

If you select a specific:

- **Location** and press **Search**, only problems in that Location will be displayed.
- **Area** and press **Search**, only problems in that Area will be displayed.
- **Work Process** and press **Search**, only problems in that Work Process will be displayed.
- **Work Activity** and press **Search**, only problems in that Work Activity will be displayed.
- **Host or Supplier Owner** and press **Search** only problems with that Problem Owner will be displayed.

By checking **Open** or **Closed**, you can choose to display only open problems, only Closed problems or both at the same time.

Enter a date range in the **From Date** and **To Date** fields to search for problems within that date range. You can specify the **Search Date** to be either the **Start Date** (the date the problem was logged in the PHRED 8D Problem Solving System), or the **Closed Date** (the date the problem status was changed to Closed).

The **Records Per Page** drop down box allows you to specify the number of records you would like displayed on the screen. Press **Next** at the bottom of the page to get to the next set of records.

You can sort by any column by clicking on the **column header**. If you click the header once, the column will be sorted from A to Z. If you click the header a second time, the column will be sorted from Z to A.

Click **Reset** to change all Search parameter fields back to the user's default values.

Appendix 1 Report Printouts

8D Report Printout

Excel Export Word Export View PDF

JW JELD-WEN 45370 8D / 7/23/2019 12:27:1

Problem Identification - D1/2

Problem Statement: Ashland/Concealed Active M³ SW Lock for New Door w/faceplate
Occurrence: 5/22/2019
 1900117 w/faceplate screw stripped
 Converted on 5/23/2019 at 3:11 PM from P#D 45370 ID to P#D 45370 8D

Days Open: 81
Last Updated by: Sally Schvey, Date: 7/23/2019

Entity Group: Windows-Wood Windows
Entity Name: Windows Hardware

Tracking Data

Due Date (10 biz days): 6/5/2019
Defect Code: DM - Hole/Size / Location
Defect Type: Uncategorized Defect

Inspect Condition (to) Attach picture: Faceplate screw stripped out
Requirement (Should be): Face plate screw is stripped out cannot be re-sealed into the face plate. This will cause potential safety issues or operational issues. The hardware defect Jeld-Wen's quality performance criteria.

Exactly how did the problem present itself? We received a box of narrow concealed active multi-point lock mechanisms and the plate screw is stripped out and cannot be re-sealed into the face plate. The screw looks like a wood threaded screw instead of a m screw as this may be the root cause of this defect. The screw will mark its way out and rub or scratch the latch strike plate over time possibly fall out. Upon inspection, we will be rejecting 26 lock mechanisms for these issues. PHRED # 28510 was issued for this as in June of 2019 for reference. Defective locks will be returned to your attention for inspection/review upon receipt of RMA. Thank you

JW P#D Number: 331283
Lot Number: 3
Supplier SD #: 331283

JW Part Number (M only): W5A09
Part Description: Concealed Active M³ SW Lock for New D w/faceplate 1900117

Supplier Part Number: W5A09
Die Number: none

Lot Number (attach pic of label): 1900117
MFG Date: 5/21/2019

Received Quantity: 38
Inspected Quantity: 38

Reject Quantity: 16
Units: Pieces

Safety Issue: No
Production Affected: Yes

Source: Manufacturing
Repeat Issue: Yes
Frequency: Annually

Related PHRED Numbers:
Debit/Credit May Apply: Yes

Disposition:
Return to Vendor: Yes
Scrap: No

Use Again: No
Notification Only: No

Network: No

Costs (to be completed by JELD-WEN):
HMA Required: Yes

Currency:

Inspection Minutes:
Material \$: 1298.16

Sort Minutes:
Customer Care \$:

Network Minutes:
Other \$:

Reject handling minutes:

Total Labor Minutes:

Total Labor Costs:

Total HMA requested Amount \$:

To be completed by Supplier:

HMA Numbers: 60335244

HMA Credit Amount \$:

Supplier Entered by: Josh Bennett

To be completed by Finance:

HMA Credit Amount Received \$:

Account Number:
Date entered by Accounting:

Entered by Name:
Amount \$:

Team Members: Jon Glen Armstrong, Joshua Bennett, Jesus Alberto Carnacho, César Jesús Car Alfaro, Dave A. Gabrovic, Michael John Grothausen, Scot M. Grunseith, Matthew Hutyrka, Lisa Kirch Lee, Thomas James Ohlfs, Juan Perales, Brian Retzlaff, Ronald Rohaley, Candace Romanowski, S Schvey, and Missy Sieg

Problem Description - D2

Explain more about the problem

What is actually happening? **What should be happening?**

Where does it happen? **When does it happen?**

Who is involved? **What is the extent of the problem?**

Containment - D3

Summarize Supplier's Containment Actions (supplier enters this)
Must be entered within 24 hours after problem opened
 31 pieces in F receipt were verified to be good. No other inventory was in warehouse.

Is there a safety risk? If yes, explain.
 Don't Know

Did defective product escape from the supplier's facility?
 Don't Know

If no, explain how you know. If yes, describe the quantity, identifying date, and suspect locations.

Possible Cause and Root Cause

Point of Cause Description 45370 1: Air Shipment were needed due to a shortage on lock components

Why 1 1: Rushed production orders due to material shortage

Why 1 2: Proper torque was not applied to screw when assembling.

Why 1 3: Hole became stripped out due to over tightening of screw

Why 1 4: Screw became loose in face plate

Root Cause: Air Shipping puts more stress on the material and causes the screw to become loose during transit

Do you want to eliminate this Point of Cause? No

How was the Root Cause verified? A shipment of locks were shipped via standard freight options. With the freighted locks the face plate screw was not a major issue.	Remove ... What data/evidence supports this event as the Root Cause? Attach it. Control Chart DOE Fishbone diagram FMEA None Pictures
--	--

Date Verification received: 05/30/2019
Root Cause Group:
Sub Group:

Point of Cause Description 45370 2: Short off the shelf wood screw was used to secure face plate.

Why 2 1: Screw was needed to secure face plate to lock during wind load testing during the design phase.

Why 2 2: Short in stock screw was selected instead of the longer machine screw that is used in wider locks.

Root Cause: Shorter wood screw was only engaging in .025" of material that would become stripped out if over tightened.

Do you want to eliminate this Point of Cause? No

How was the Root Cause verified? Design review of lock was performed and found that with a wood screw there was limited thread engagement into the housing.	Remove ... What data/evidence supports this event as the Root Cause? Attach it. Control Chart DOE Fishbone diagram FMEA None Pictures
---	--

Date Verification received:
Root Cause Group:
Sub Group:

Solution(s) - D5/6/7

Summarize Your Solution - What is the Overall Corrective Action? (attach evidence):
 Solution is to change screw to a blind pop rivet. After the screw is installed it should never be removed. So to ensure this a rivet is a better option.

How did you verify that this will prevent recurrence?:
 Three sample locks were constructed with blind rivet and a prying force was applied. The rivet would not fall during testing (specie limited).

How will you verify that the problem does not happen again in the future?:
 Implement blind rivet into current production and rework all current product in supply chain to use this rivet.

Status and Closure Information

Status: Closed
Temporary Fix(es) (Removed)? No

What was changed that will prevent recurrence of the Root Cause?
 Implement rivet to hold face plate on.

Lessons Learned: What went well? / What did not go well?
 A strong design review of the lock lock plate in relation to the features that had not occurred since product launch in 2014. Short term solutions did not work well with switching to machine screws and trying tactile

Comments:


Opened Date: 5/22/2019
Opened By: Michael John Grothausen

Closed Date: 7/23/2019
Closed By: Sally Schvey

Actions


8D Action Description	Status	Due Date	Completion Date
Responsible	Type	Sub Type	Sub Type
Last Updated	bit		
Completion Comment			
Screen Name: Problem Identification			
1. Additional quantity added as well as additional credit cost and pic to view in attachments.	Closed	5/22/2019	5/23/2019
Joshua Bennett	Request Credit	No Value Selected	No Value Selected
By: Michael John Grothausen Date-Time: 5/22/2019-14:57			
2. Additional quantity added as well as additional credit cost and pic to view in attachments for 3 boxes of lock machs received.	Closed	5/22/2019	5/23/2019
Joshua Bennett	Request Credit	No Value Selected	No Value Selected
By: Michael John Grothausen Date-Time: 5/22/2019-15:42			
3. Reject quantity updated as well as credit request.	Closed	5/30/2019	5/31/2019
Joshua Bennett	Request Credit	No Value Selected	No Value Selected
By: Michael John Grothausen Date-Time: 5/30/2019-11:18			
4. HMA issued for 26 pieces	Closed	5/30/2019	5/30/2019
Joshua Bennett	No Value Selected	No Value Selected	No Value Selected
By: Joshua Bennett Date-Time: 5/30/2019-16:31			

Action Summary Report Printout

<input type="button" value="Print"/> <input type="button" value="Close"/>			
		Action Summary Report	
Problems Selected: 62		Monday, January 03, 2011 9:38:32 AM (MST)	
ID: 559 QC Title: Low capcitics in a tuned LRC circuit			
ScreenName: Problem Identification			
ID: 1	Status: Closed	Closed Date: 12/2/2010	Responsible: Samrat Ghimire
Description: Call Mike in Cell 54 to check it out.			
ScreenName: Temp CM			
ID: 1	Status: Open	Due Date:	Responsible: Monica Stout
Description: Notify first mfg station			
ScreenName: Permanent CM			
ID: 1	Status: Pending	Due Date: 11/23/2010	Responsible: Samrat Ghimire
Description: notify cell #23 about this change			
ID: 558 ID Title: Plugged Area sump pump			
ScreenName: Problem Identification			
ID: 1	Status: Open	Due Date:	Responsible: Monica Stout
Description: Filled out MO			
ID: 2	Status: Open	Due Date:	Responsible: Monica Stout
Description: Put on aganda for next meeting			

Note: On the report page, if only **Open Actions** is checked, only actions with a status of open will be shown. When it is NOT checked, all actions will be shown.

Problem Summary Report

				
Problem Summary				
Problems Selected: 48		Monday, January 03, 2011 9:52:30 AM (MST)		
Title: TOC Sensor constants	<u>PID</u> 934 ID	<u>Start Date</u> 6/28/2011	<u>Status</u> Closed	<u>Section</u> Closed
	<u>Location - Area</u> <u>Work Process</u> Allentown - Operations - Assembly		<u>Problem Owner</u> Arnold, ted	
Title: Plugged Area sump pump in flange	<u>PID</u> 932 ID	<u>Start Date</u> 2/9/2011	<u>Status</u> Open	<u>Section</u> Problem ID
	<u>Location - Area</u> <u>Work Process</u> Allentown		<u>Problem Owner</u> RAMBAUD, LAURIE	
Title: Flange 8877 on edge strip breaks during installation of light truck doors	<u>PID</u> 931 8D	<u>Start Date</u> 12/9/2010	<u>Status</u> Open	<u>Section</u> 8D
	<u>Location - Area</u> <u>Work Process</u> Charlotte - Operations - Receiving		<u>Problem Owner</u> Lineman, Jason	
Title: Tape sun-damaged around vent area 3477BB	<u>PID</u> 921 8D	<u>Start Date</u> 1/21/2011	<u>Status</u> Open	<u>Section</u> 8D
	<u>Location - Area</u> <u>Work Process</u> Charlotte - Operations - Receiving		<u>Problem Owner</u> Stout, Monica	
Title: Incomplete Shipment to customer 105-8941	<u>PID</u> 888 8D	<u>Start Date</u> 1/21/2011	<u>Status</u> Open	<u>Section</u> 8D
	<u>Location - Area</u> <u>Work Process</u> Charlotte - Operations		<u>Problem Owner</u> Uprety, Avishek	
Title: Incomplete Shipment to customer 105-8941	<u>PID</u> 878 8D	<u>Start Date</u> 1/21/2011	<u>Status</u> Open	<u>Section</u> 8D
	<u>Location - Area</u> <u>Work Process</u> Charlotte - Operations - Receiving		<u>Problem Owner</u> Stout, Monica	
Title: ball valve number B1271 does not work properly, valve leaks water when it should not	<u>PID</u> 877 8D	<u>Start Date</u> 1/21/2011	<u>Status</u> Open	<u>Section</u> 8D
	<u>Location - Area</u> <u>Work Process</u> Indianapolis - Operations - Assembly		<u>Problem Owner</u> Stout, Monica	
Title: Material Quality of Sheet Metal is below standard	<u>PID</u> 866 8D	<u>Start Date</u> 12/9/2010	<u>Status</u> Open	<u>Section</u> 8D
	<u>Location - Area</u> <u>Work Process</u> Bangalore - Operations - Assembly		<u>Problem Owner</u> Uprety, Avishek	
Title: Low Fill on Cherry Vanilla Diet Cola 1 Liter PET	<u>PID</u> 551 QC	<u>Start Date</u> 2010-11-01 13:52:12.0	<u>Status</u> Open	
	<u>Location - Area</u> <u>Work Process - Work Activity</u> Denver - Customer Support		<u>Problem Owner</u> Rennie, Nick	
Title: Late Shipments on the xxx line for customer yyy	<u>PID</u> 541 QC	<u>Start Date</u> 2010-11-01 13:46:36.0	<u>Status</u> Open	
	<u>Location - Area</u> <u>Work Process - Work Activity</u> Denver - Maintenance		<u>Problem Owner</u> Sparks, Leonard John	

Excel All

ID	Type	Status	Title	Location	Area	Problem Owner	Supplier Owner	Supplier	Start Date	Due Date	Close Date	Containment Date	Part Number	Part Description	NR Number	Rej
1570	ID	Open	8877 bent in insulation	Bangalore	Quality	Rennie, Nick	Lim, Ann	SupplierB	11/28/2017	12/28/2017						
1550	8D	Open	flange 8877 won't stay in place	Allentown	Maintenance	Stout, Monica	Lim, Ann	SupplierB	5/4/2015	6/4/2015		5/9/2015				
1530	8D	Open	Gear dimension out of spec	Indianapolis	Operations	Stout, Monica	Crocker, Laurie	SupplierB	2/14/2015	3/14/2015		2/14/2014				
1490	8D	Open	Flange 8877 on edge strip breaks during installation of light truck doors	Cincinnati	Operations	Rennie, Nick	Lim, Ann	SupplierB	6/2/2015	7/2/2015		2/2/2015	K97 Door	K97BES		
1480	8D	Open	Material Quality of Sheet Metal is below standard	Chattanooga	Quality	RAMBAUD, LAURIE	Lim, Ann	SupplierB	5/28/2015	6/28/2015		6/30/2013				
1200	8D	Closed	sump pump SP1233 does not drain properly	Cincinnati	Operations	Uprety, Avishek	Greene, Jack	SupplierB	5/13/2015	6/13/2015	6/5/2015		Sump Pump SP1233	Sump Pump SP1233	John Middleton	
750	8D	Closed	Diff Lock valve is not sealed tightly enough for machine, valve number K7411	Shanghai	No Value Selected	Rennie, Nick	Zhang, Greg	SupplierB	4/2/2015	5/2/2015	4/18/2015	1/12/2011	K7411	Diff Lock Valve K7411	Gerald Kordite	
600	8D	Closed	Gromet Unseated in Left Flange Lock	Allentown	Operations	Uprety, Avishek	Lim, Ann	SupplierB	2/27/2015	3/27/2015	3/1/2015	7/15/2010	TB1529	FGT Long TB1529	Keith Holland	