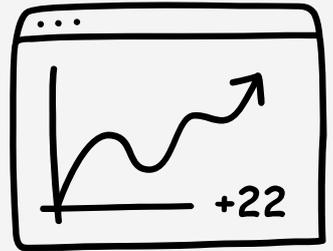
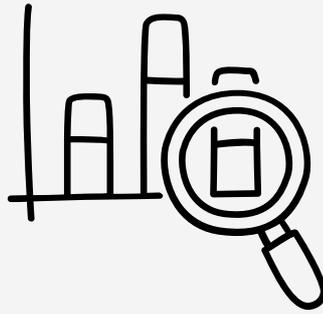
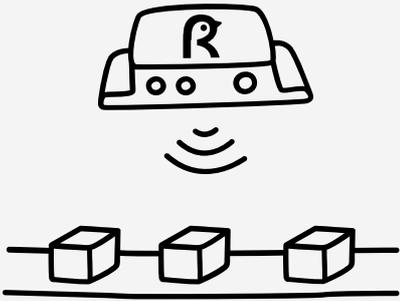


# FACTBIRD

## USER GUIDE | Action Plans



OEE

# USER GUIDE

## Action Plans

### What is Factbird Action Plans module?

Factbird Action Plans is a feature on Factbird manufacturing intelligence software. It is a project and task management tool designed for continuous improvement within manufacturing, using PDCA method for problem solving.

### Benefits & Features

Action Plans drives improvement plans in the factories, by streamlining/digitizing the workflow, prompting actions and adjustments with notifications, and retaining and utilizing know-how across the organization.

Furthermore, Action Plans accelerate the utilization of manufacturing data in the Factbird software by associating downtime analysis data with problem solving actions. Adding Action Plans to the Factbird software provides a comprehensive solution for manufacturers to turn data into value, which closes the loop of getting data to increase efficiency.



Efficiently manage and drive data driven CI (Continuous improvement) activities across departments.



Digitize problem solving tasks and CI initiatives, gain visibility of their status.



Preserve problem solving expertise to prevent knowledge loss, leverage knowledge across sites.

### Use case examples

- **Visibility** - Start digitizing and managing action plans on Factbird to gain visibility of all action plans and their status, use at daily/weekly performance meeting.
- **CI management** - Drive data/fact-based CI initiatives using Factbird downtime analytics and Action Plans. Utilize reminder and escalation features to follow up on various initiatives. Knowledge is retained in the cloud for future use.
- **Digitizing problem-solving task** - Streamline problem-solving tasks. Upload photos containing the problem-related data (analytics, metrics, batch/product-specific), archive them in the cloud, share them, and make a plan to improve.

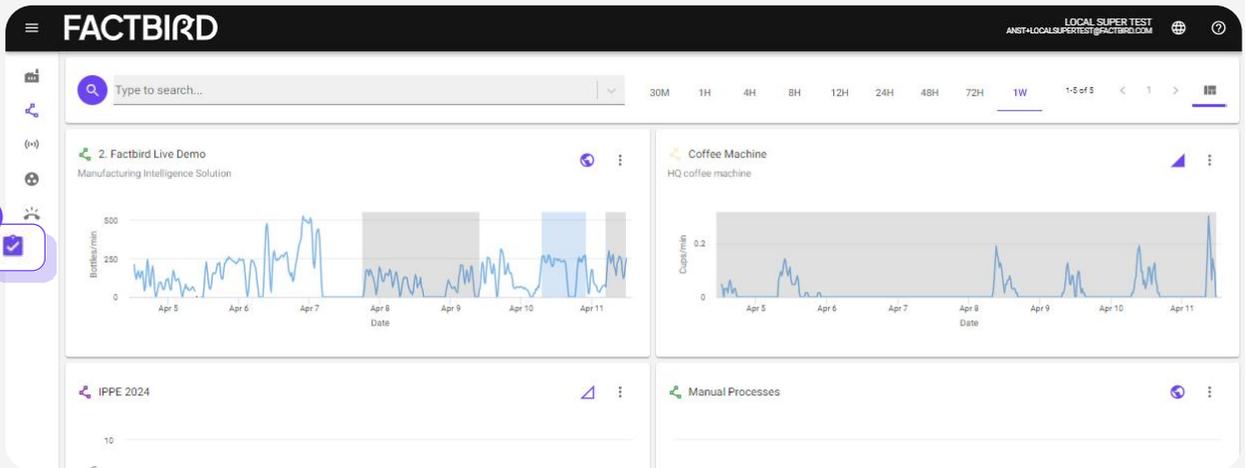
# USER GUIDE

## Action Plans

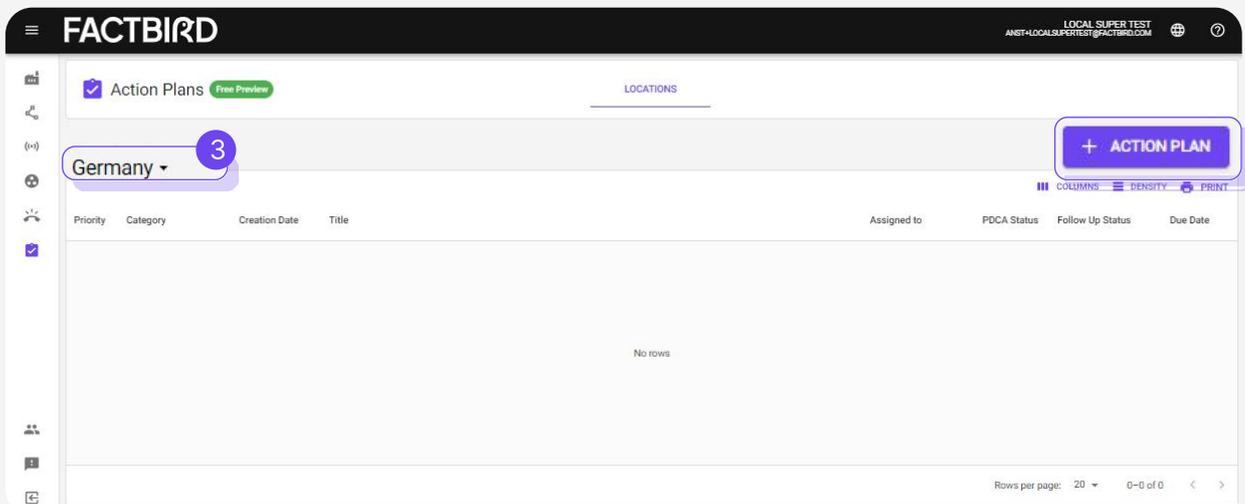
# 1 a

### Go to Action Plans and create an action plan

1. Click on **“Action Plans”** from the menu on the left side of the view



2. **“Action Plans”** page will be shown. Click **+ ACTION PLAN** button to create an action plan.



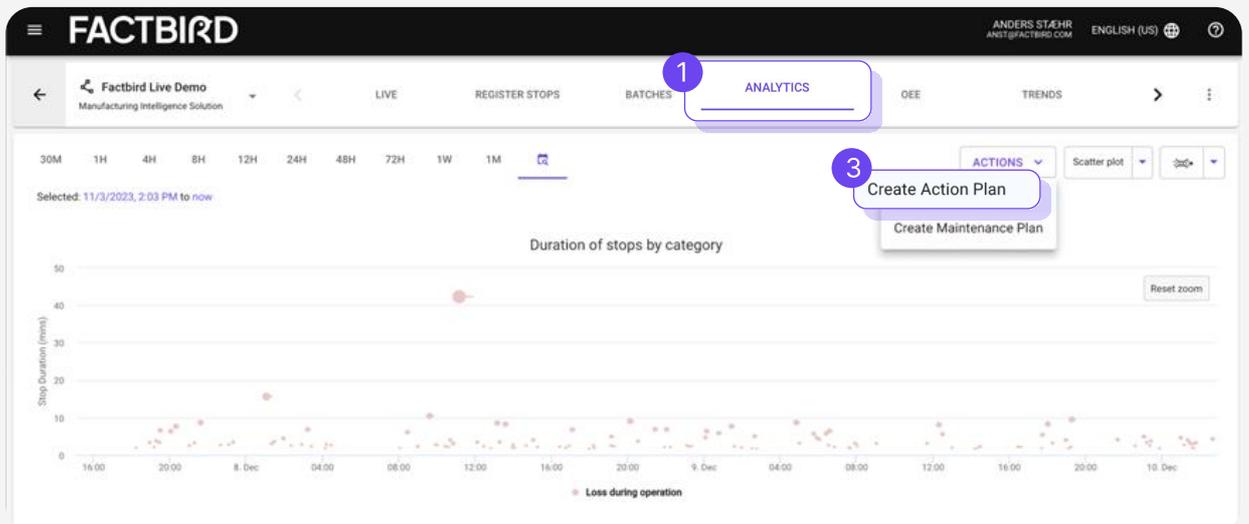
3. By selecting a location (e.g., line or company), you can create action plans for that location.

New groupings of locations (e.g., departments, business units, sites) can be added and edited on the **“ORGANIZATION”** tab on the **“Administration”** page, if necessary. Contact your sales person for more information.

# 1b

### Go to ANALYTICS and create action plan

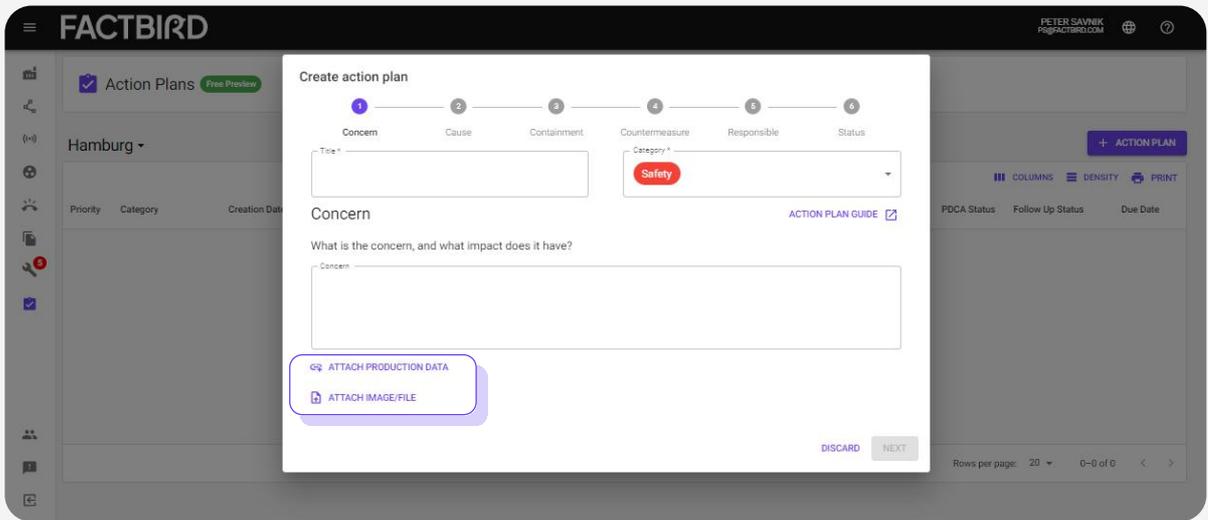
1. Navigate to your desired line, then click the “**ANALYTICS**” tab.
2. Navigate to your desired analysis, e.g., “product jam” during April.
3. Click on “**ACTIONS**” and “**Create Action Plan**” to create an action plan for the analysis in 2, e.g., create an action plan for the “product jam”.



## 2 Fill out the form to create an action plan

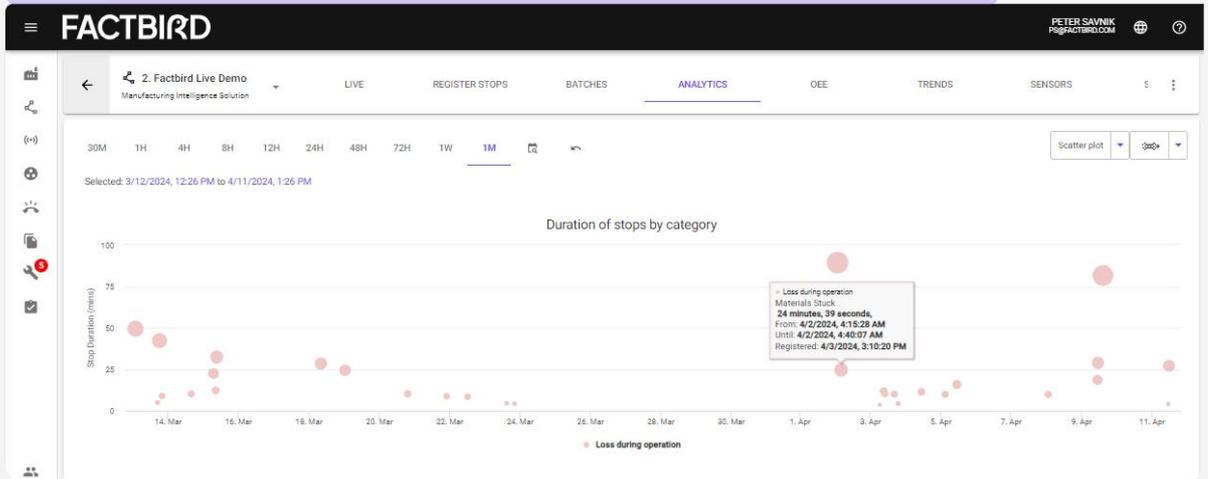
On the “**Create action plan**” pop-up, fill out the information by following the instructions.

- **Title:** The name of the action plan
- **Category:** Choose from pre-set categories that cover typical categories for SQCDE (Safety, Quality, Cost, Delivery, Environment).



- **ATTACH PRODUCTION DATA:** The link to the relevant Factbird page (e.g., analytics of a stop cause “product jam” during April) can be added.

<https://cloud.factbird.com/line/?lineId=bf170db0-a153-11ed-a701-8b2fe9616fcf&tab=analytics&nodeId=&analyti...>



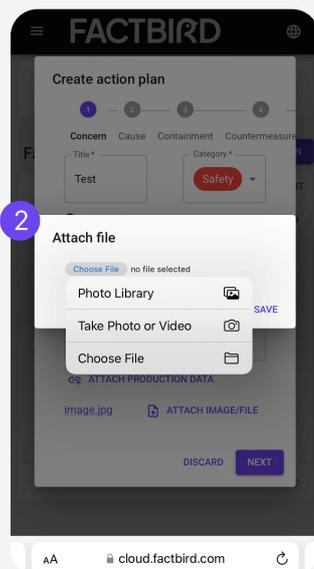
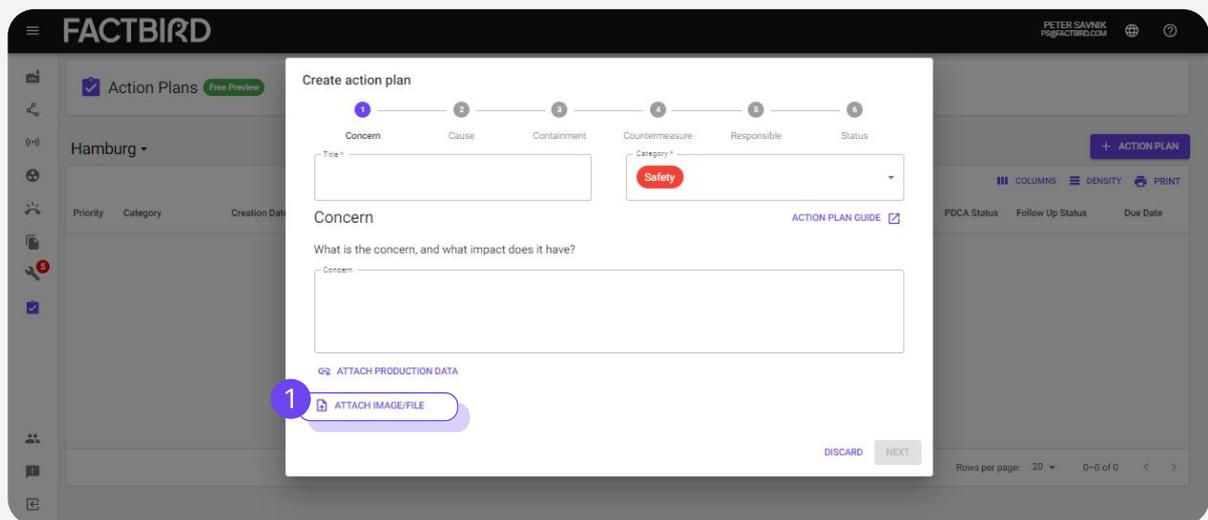
- **ATTACH IMAGE/FILE:** Relevant image/file (e.g., JPEG, PNG, PDF, any file format) can be uploaded. Multiple files and images can be uploaded by choosing a file and saving them one by one.

# USER GUIDE

## Action Plans

Attach images from your mobile device

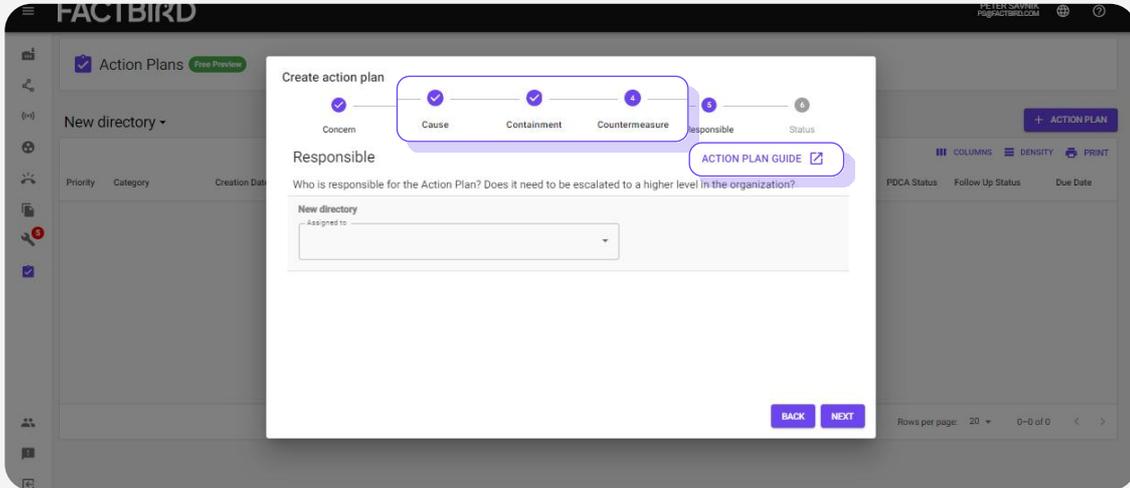
1. Use your mobile device and click on **“ATTACH IMAGE/FILE”**.
2. Click on **“Choose File”** and you can directly access your mobile device’s camera to upload images.



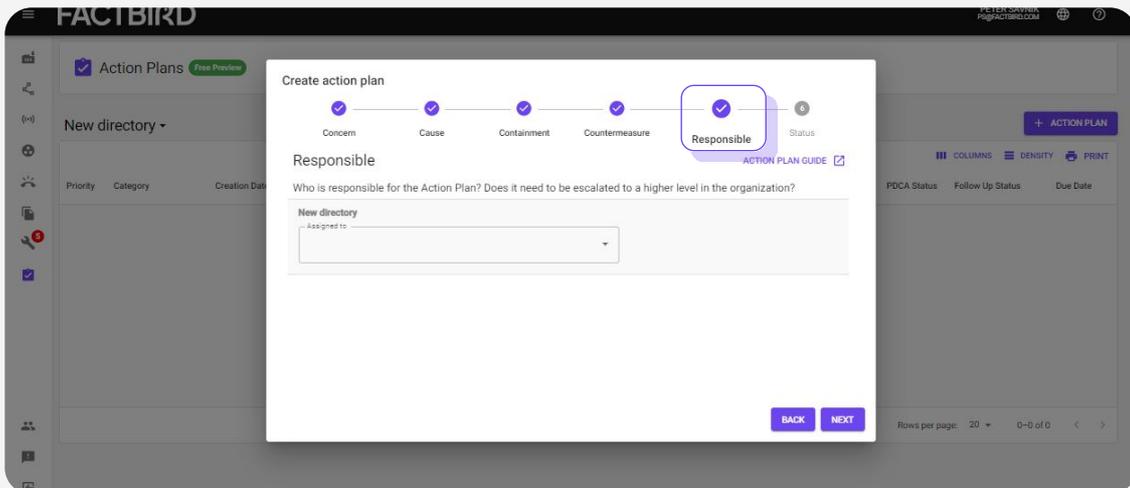
# USER GUIDE

## Action Plans

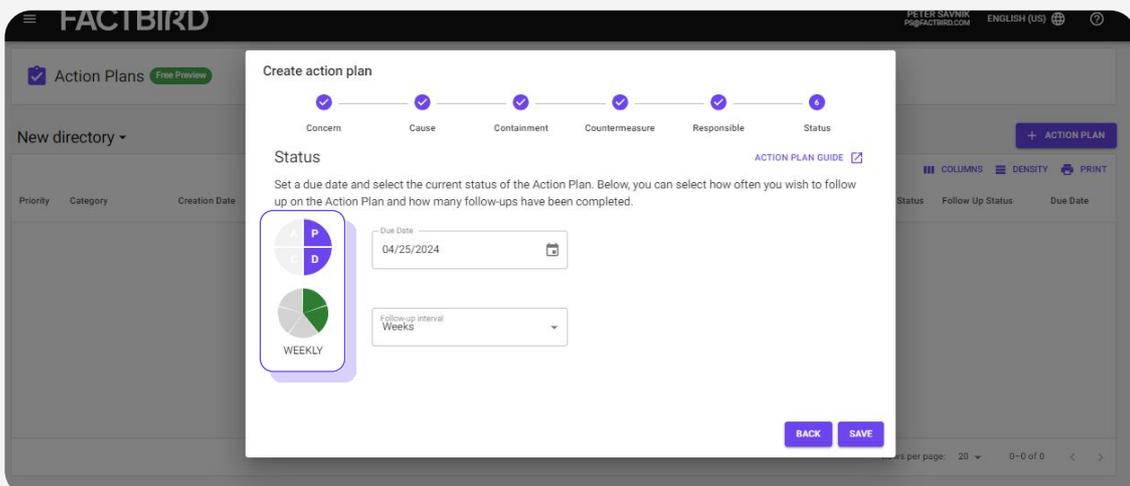
- Fill out **“Cause”, “Containment”, “Countermeasure”**.
- Clicking **“ACTION PLAN GUIDE”** shows the explanation of the PDCA cycle for your reference.



- On step **“Responsible”**, choose the responsible person from the drop down menu. The person will receive a notification email from Factbird once the action plan is created.



- Set a due date and select the current status from the pie chart to visually indicate the status.
- Select a follow-up interval and click on the pie chart to visually indicate the status and click on **“SAVE”**



### 3

#### Manage action plans on Action Plans dashboard

1. Click on “**Action Plans**” from the menu on the left side.
2. Once action plans are created, they will be shown on the Action Plans dashboard.
3. **COLUMNS**: This allows you to customize the view by showing/hiding columns.
4. **DENSITY**: This allows you to adjust the view by narrowing/widening rows.
5. Clicking on a column title sorts the list.
6. Clicking on a star to turn it yellow visually highlights the action plan. Action plans with a star will be sorted higher by default.
7. You can select a location (e.g., departments, business units, sites) to show the action plans that belong to that location. The locations (e.g., departments, business units, sites) can be added and edited on “**ORGANIZATION**” tab on the “**Administration**” page.

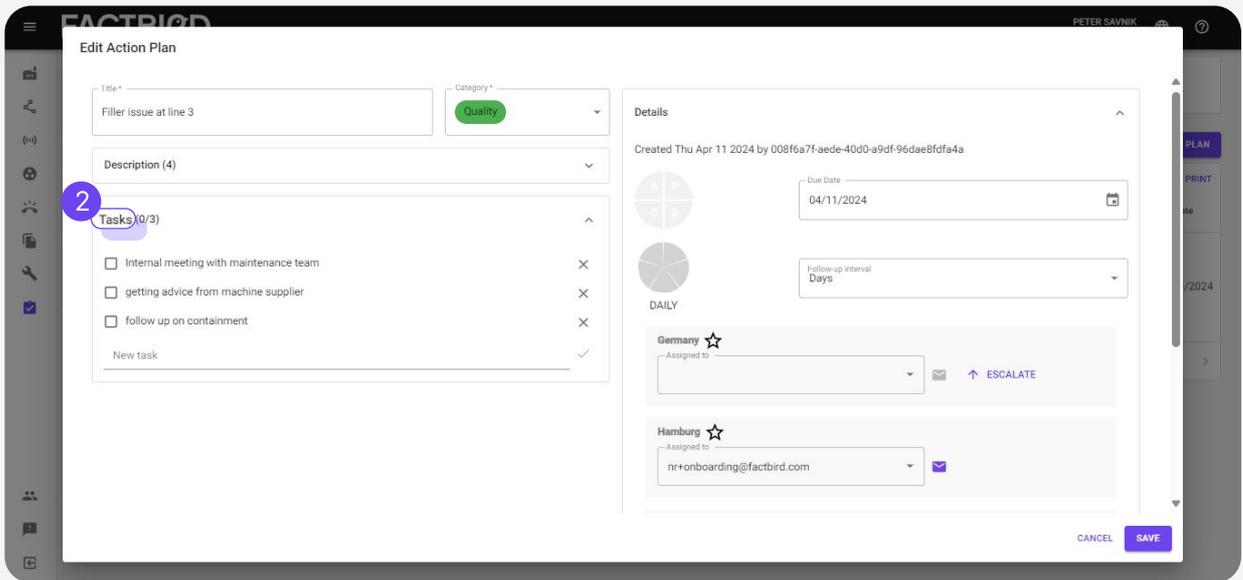
The screenshot shows the FACTBIRD Action Plans dashboard. The interface includes a sidebar menu on the left, a top navigation bar with the FACTBIRD logo and user information, and a main content area. The main content area features a filter for 'Germany' (callout 7), a 'Category' dropdown (callout 5), and a table of action plans. The table has columns for Priority, Category, Creation Date, Title, Concern, Assigned to, PDCA Status, Follow Up Status, and Due Date. The first row is highlighted with a star (callout 6). The table also includes 'COLUMNS' and 'DENSITY' controls (callouts 3 and 4) and a '+ ACTION PLAN' button. The bottom right corner shows 'Rows per page: 20' and '1-4 of 4'.

Priority	Category	Creation Date	Title	Concern	Assigned to	PDCA Status	Follow Up Status	Due Date
★	Delivery	10/04/2024	Packaging line jams	Frequent jams in the packaging line during product transitions	Anders Staehr			14/04/2024
★	Safety	10/04/2024	Filling sequence issue	Filling sequence gets out of sync on can size change	Anders Staehr			27/04/2024
★	Quality	10/04/2024	Low label quality	Labeling errors increase during product switchovers	Anders Staehr			30/04/2024
★	Cost	10/04/2024	Bottle seal problems	Inconsistent seal integrity on bottle closures	Anders Staehr			31/05/2024

# 4

## Add tasks to an action plan

1. Click on an action plan from the list to go to the “**Edit Action Plan**” page.
2. Click on “**Tasks**” to add tasks.
3. Check the checkboxes once the tasks are completed.



# 5

## Send notifications to remind and escalate

1. Click on an action plan to see the full details or edit it.
2. Clicking mail icon sends an email notification to the responsible person.
3. If an action plan requires escalation to a higher level in the organization, use the **"ESCALATE"** button. Once escalated, the action plan also show up on the list of action plans for the level it has been escalated to. You can also assign a responsible at this new level who will get notified on email about their responsibility.

