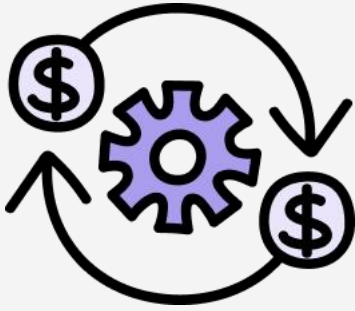


# FACTBIRD

**USER GUIDE** | Knowledge Excellence



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## Training and Skills management

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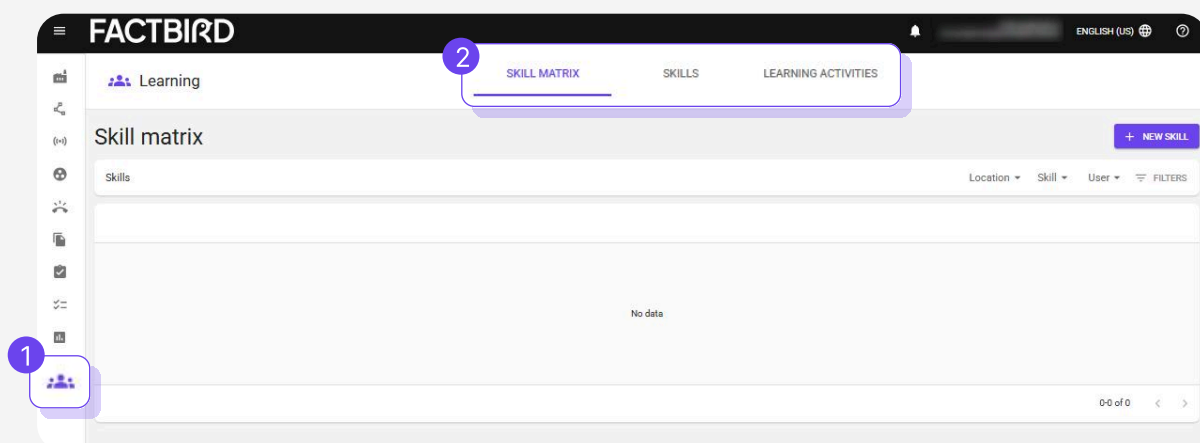
## Training and Skills Management

### What is Training and Skills Management

Training and Skills Management in Factbird Knowledge Excellence provides a systematic approach to workforce development for sustainable change, supporting skill development from onboarding to upskilling and ensuring the right skill profiles are available to meet production demands.

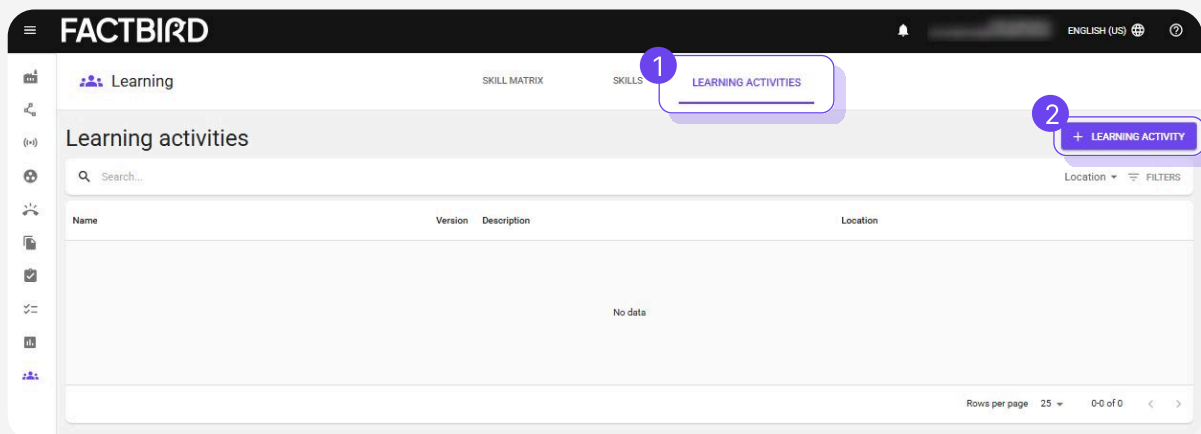
## 1 Access Training and Skills Management

1. On the menu, click on **"Learning"**.
2. There are three tabs:
  - a. **"LEARNING ACTIVITIES"**: New training content (learning activities) can be created and updated digitally. All created training content will be listed here.
  - b. **"SKILLS"**: You can define skills by associating training content with them. For example, operating the filler requires the completion of two specific training content (learning activities).
  - c. **"SKILL MATRIX"**: You can associate skills with individuals. For example, specifying which employees need to be enrolled in specific skills. It then provides an overview of employee and their skill attainment status.

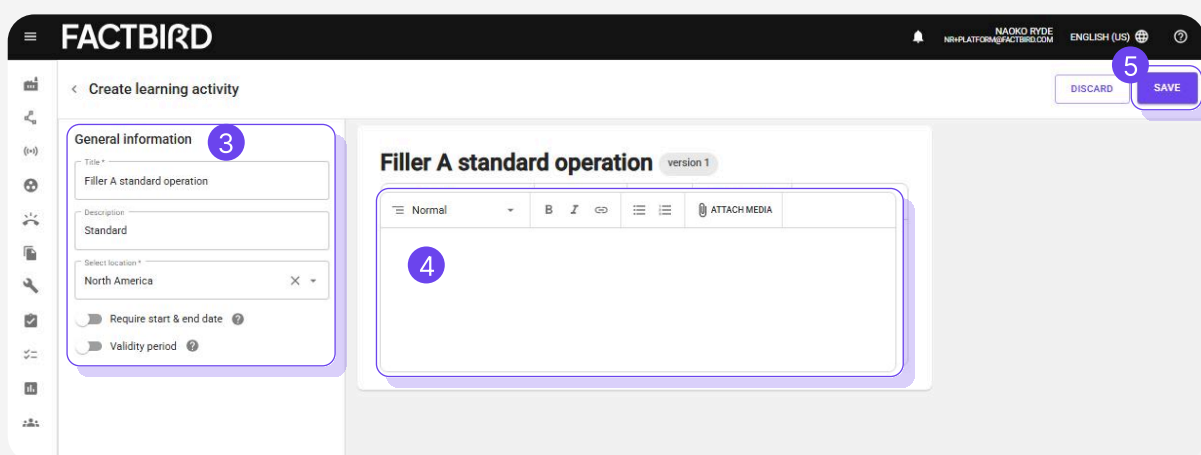


## 2 Create training content (learning activities)

1. Click on the “**LEARNING ACTIVITIES**” tab.
2. Click on the “**+ LEARNING ACTIVITY**” button.

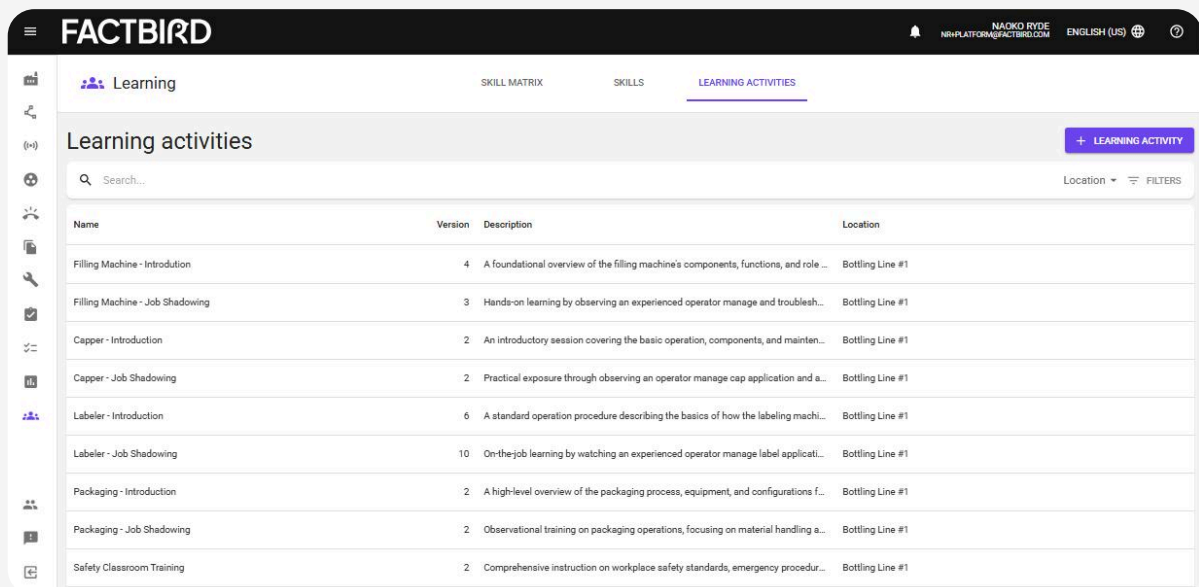


3. Fill out the “**General information**”:
  - Enter the “**Title**” and “**Description**”.
  - Select the “**location**” where the training content will be applicable.
  - Slide the toggles for “**Require start & end date**” and “**Validity period**” if needed.
4. Write the content in the editor, attach links, images, and videos if needed. Links can be to external systems, such as SharePoint or YouTube, when linking existing training content.
5. Click “**SAVE**”.



### 3 Update training content (learning activities)

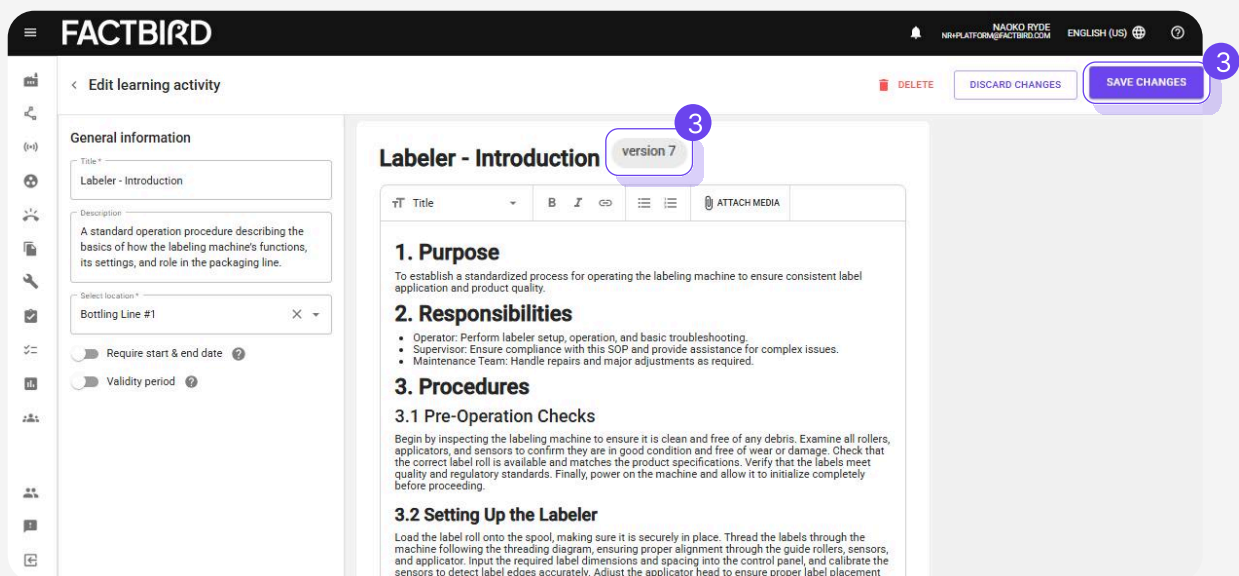
1. Created training content will be displayed in the list.
2. Clicking on the list opens the content editor.



The screenshot shows the FACTBIRD Learning Activities interface. At the top, there's a navigation bar with 'Learning', 'SKILL MATRIX', 'SKILLS', and 'LEARNING ACTIVITIES'. Below this is a search bar and a table of learning activities. The table has columns for Name, Version, Description, and Location. A '+ LEARNING ACTIVITY' button is in the top right corner.

Name	Version	Description	Location
Filling Machine - Introduction	4	A foundational overview of the filling machine's components, functions, and role ...	Bottling Line #1
Filling Machine - Job Shadowing	3	Hands-on learning by observing an experienced operator manage and troublesh...	Bottling Line #1
Capper - Introduction	2	An introductory session covering the basic operation, components, and mainten...	Bottling Line #1
Capper - Job Shadowing	2	Practical exposure through observing an operator manage cap application and a...	Bottling Line #1
Labeler - Introduction	6	A standard operation procedure describing the basics of how the labeling machi...	Bottling Line #1
Labeler - Job Shadowing	10	On-the-job learning by watching an experienced operator manage label applicati...	Bottling Line #1
Packaging - Introduction	2	A high-level overview of the packaging process, equipment, and configurations f...	Bottling Line #1
Packaging - Job Shadowing	2	Observational training on packaging operations, focusing on material handling a...	Bottling Line #1
Safety Classroom Training	2	Comprehensive instruction on workplace safety standards, emergency procedur...	Bottling Line #1

3. Update the content and click “**SAVE CHANGES**”, which will mark it as the next version.



The screenshot shows the 'Edit learning activity' form in FACTBIRD. The form is titled 'Labeler - Introduction' and is at 'version 7'. It has three main sections: 'General information', 'Labeler - Introduction', and '3. Procedures'. The 'General information' section includes fields for Title, Description, and Location. The 'Labeler - Introduction' section has a rich text editor with a toolbar. The '3. Procedures' section contains a list of responsibilities and procedures. A 'SAVE CHANGES' button is highlighted with a red circle and the number 3.

**General information**

Title \*  
Labeler - Introduction

Description  
A standard operation procedure describing the basics of how the labeling machine's functions, its settings, and role in the packaging line.

Select location \*  
Bottling Line #1

☐ Require start & end date ?

☐ Validity period ?

**Labeler - Introduction** version 7

**1. Purpose**  
To establish a standardized process for operating the labeling machine to ensure consistent label application and product quality.

**2. Responsibilities**

- Operator: Perform labeler setup, operation, and basic troubleshooting.
- Supervisor: Ensure compliance with this SOP and provide assistance for complex issues.
- Maintenance Team: Handle repairs and major adjustments as required.

**3. Procedures**

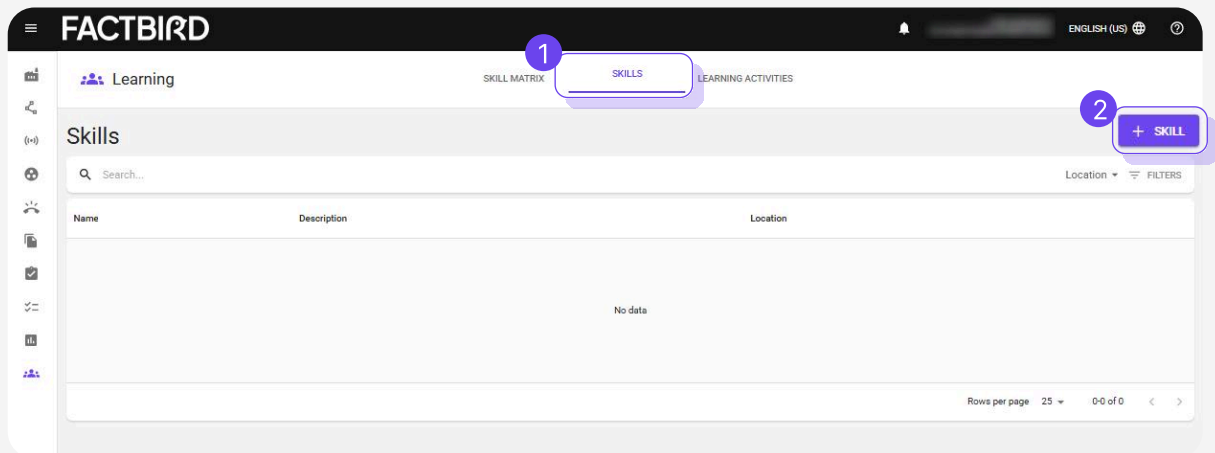
**3.1 Pre-Operation Checks**  
Begin by inspecting the labeling machine to ensure it is clean and free of any debris. Examine all rollers, applicators, and sensors to confirm they are in good condition and free of wear or damage. Check that the correct label roll is available and matches the product specifications. Verify that the labels meet quality and regulatory standards. Finally, power on the machine and allow it to initialize completely before proceeding.

**3.2 Setting Up the Labeler**  
Load the label roll onto the spool, making sure it is securely in place. Thread the labels through the machine following the threading diagram, ensuring proper alignment through the guide rollers, sensors, and applicator. Input the required label dimensions and spacing into the control panel, and calibrate the sensors to detect label edges accurately. Adjust the applicator head to ensure proper label placement

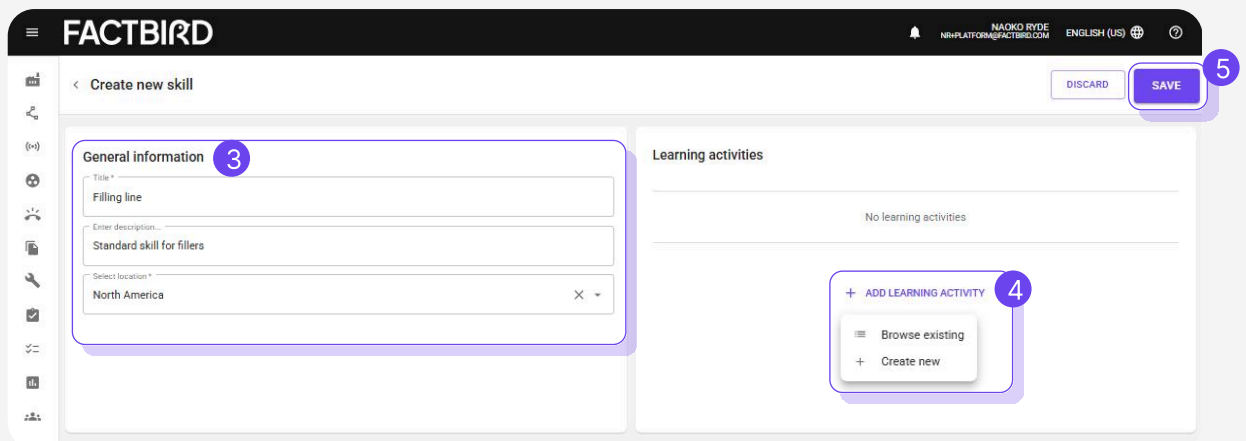
# 4

## Associate training content (learning activities) with skills

1. Click on the “**SKILLS**” tab.
2. Click on the “**+ SKILL**” button.



3. Fill out the “**General information**”:
  - Enter the “**Title**” and “**Description**”.
  - Select the “**location**” where the skill will be applicable.
4. Click “**+ ADD LEARNING ACTIVITY**” to associate training content to the skill. Use “**Browse existing**” to select from existing content or “**+ Create new**” to create new training content.
5. Click “**SAVE**”.



### 5 Associate skills and employee (users)

1. Click on the “**SKILL MATRIX**” tab.
2. The Skill matrix displays a chart of employees (users), their skills, and their skill status. What is displayed depends on the location, which can be selected from the “**Location**” menu. For example, if you choose “North America” from the “**Location**” menu, it will show the employees (users) and skills applicable to North America, including all assets and lines that belong to it.
3. To enroll a skill for an employee, drag the cursor to the skill and employee, then click “+”.
4. Click “**ENROLL**”. The circle will appear to indicate that the skill has been enrolled for the employee.

	Filler	Capper	General Safety	Labeler	Equipment	Cleaning	Quality Control	Cleaning, Inspecti...	Documentation	Using Factbird
Sam Darnold	✓	✓	✓	✓	✓	✓	✓	✓		
Nico Collins	✓	✓	✓	✓	✓	✓	✓	✓		
Jaylen Warren	✓	✓	✓	✓	✓	✓	✓	✓		
Puka Nacua	✓	✓	✓	✓	✓	✓	✓			
Nikolaj Arsliev	✓	✓	✓	✓	✓	✓	✓	✓		✓
Malik Nabers	○	○	○	○	○	○	○			
Tua Tagovailoa	✓	✓	✓	✓	✓	✓	✓			
Saquon Barkley	○	+								
Keon Coleman	✓	✓	✓	✓	○	✓	✓			
Khalil Shakir	✓	✓	✓	✓	○	✓	✓			

- ✓ A checked circle indicates that the skill has been obtained, meaning the training for the skill has been completed by the employee.
- A blank circle indicates that the training is enrolled for the employee, and the skill has not yet been obtained.

**Skill**

**Capper**  
Operating and maintaining capping machines.

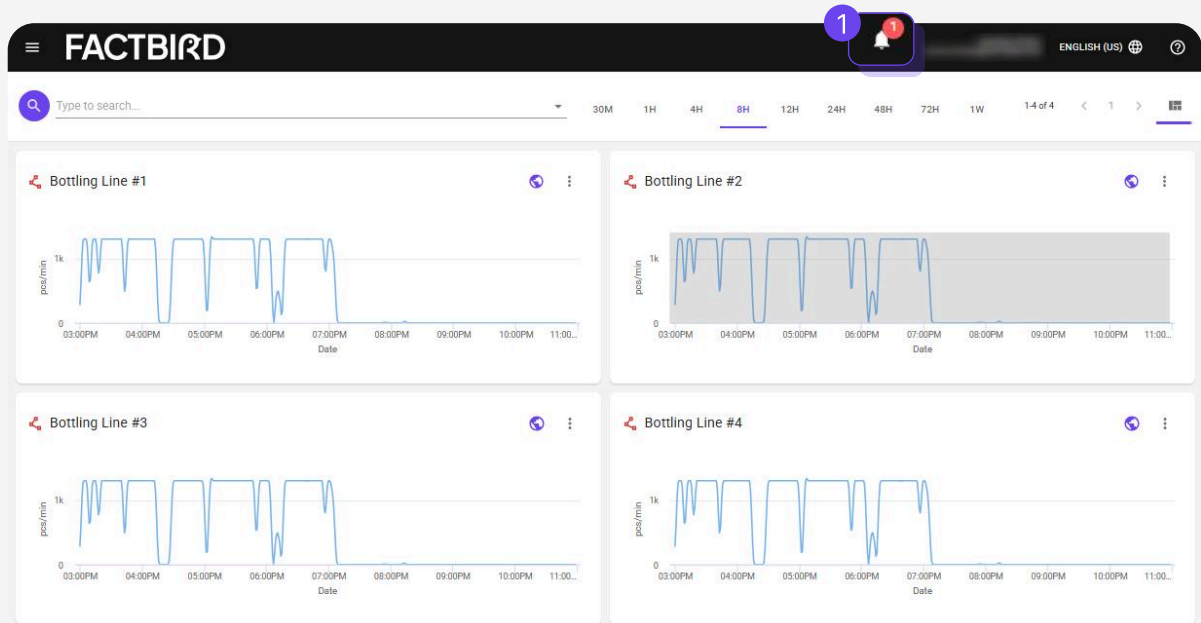
Enrolled by: Saquon Barkley | Status: Not started | **ENROLL**

**Required learning activities**  
This skill will be granted automatically once all learning activities have been completed.

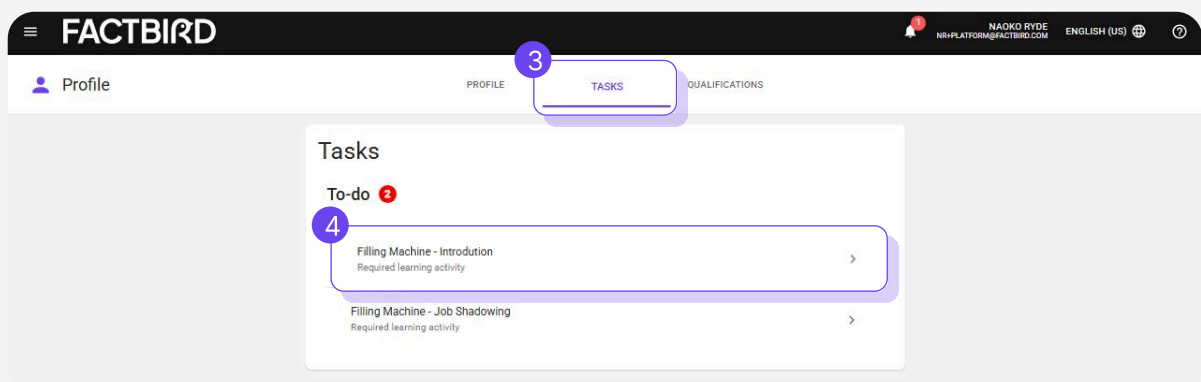
Learning Activity	Version	Status	Enrolled	Completed	Valid Until
Capper - Introduction	2	Not started	-	-	-
Capper - Job Shadowing	2	Not started	-	-	-

## 6 For an employee (user) to use Training

1. When an employee (user) logs in to Factbird, “**Notification**” icon will be displayed at the top right of the screen.
2. Clicking the notification icon opens “**Profile**” page of the user.



3. “**TASKS**” tab shows the training that needs to be completed by the user.
4. Click on the list and it opens the content.

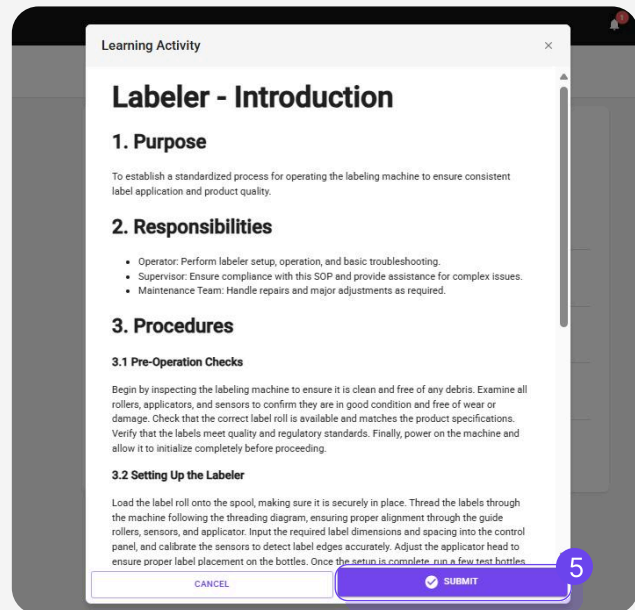




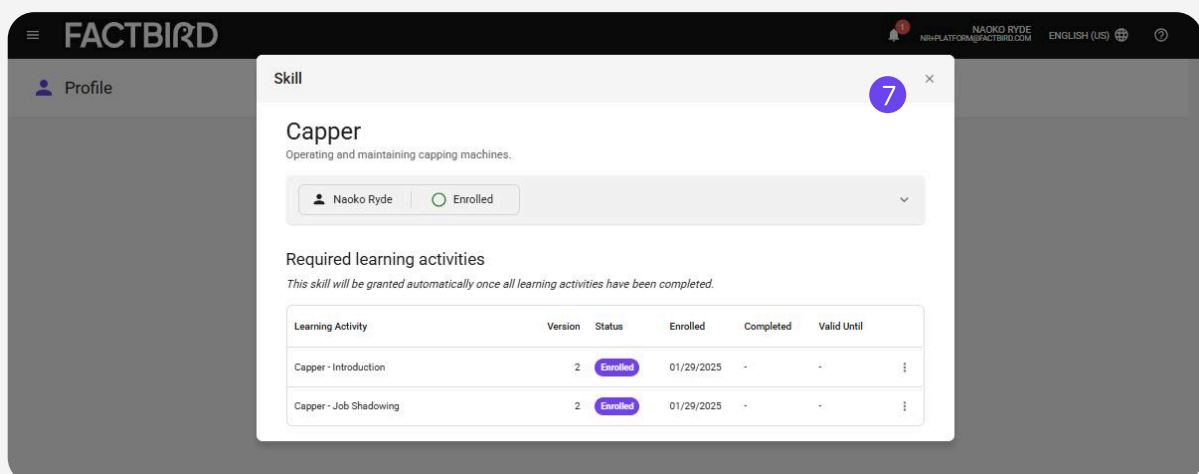
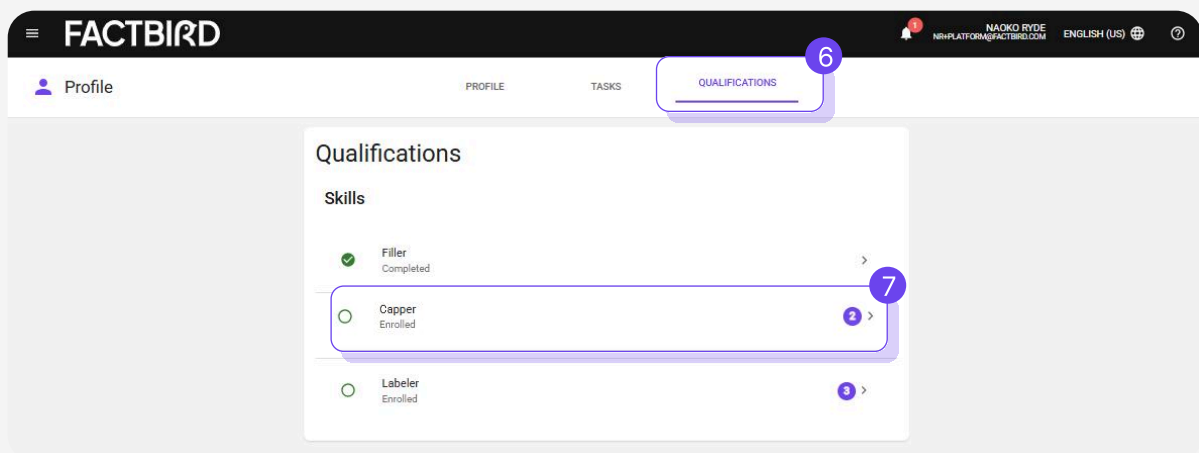
# USER GUIDE

## Training and Skills Management

5. Click "**SUBMIT**" when the user completes the training. This will automatically update the skill status in the Skill Matrix.



6. "**QUALIFICATION**" tab displays a list of skills assigned to the user.
7. Clicking on a skill opens its details.



# USER GUIDE

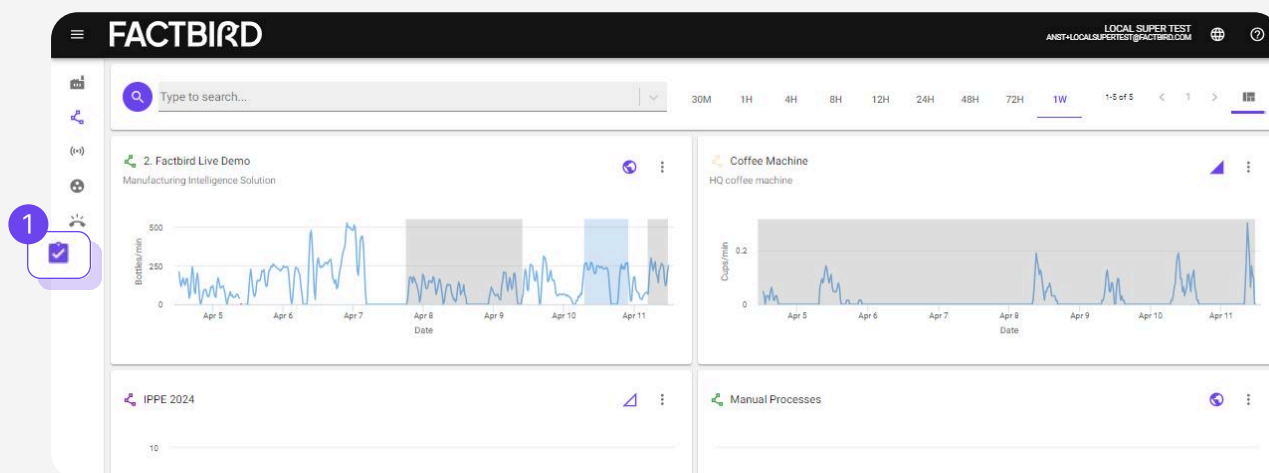
## Action Plans

### What is Factbird Action Plans?

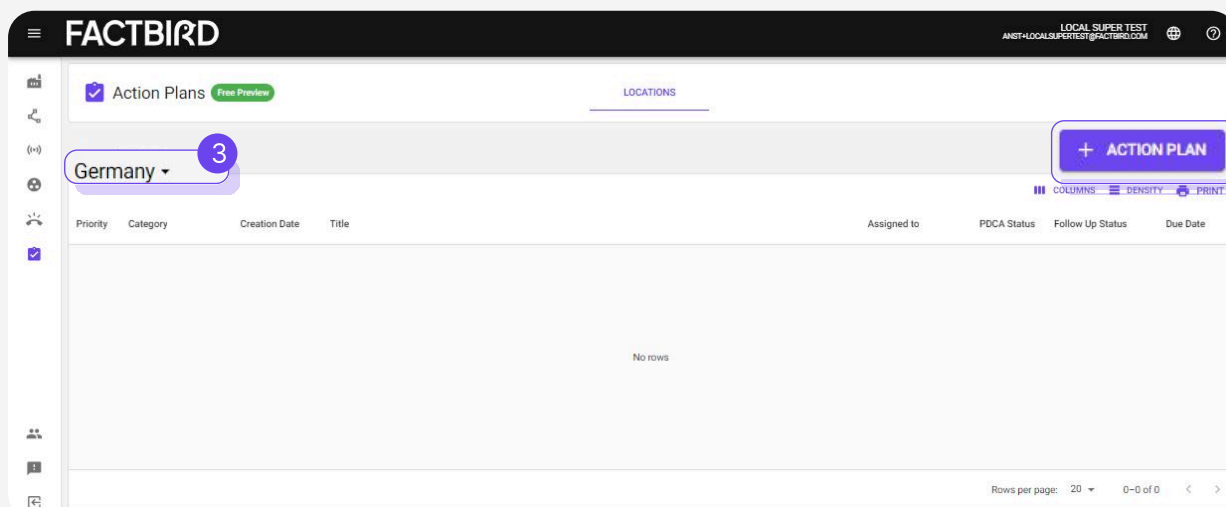
Action Plans in the Factbird Knowledge Excellence application is designed to drive improvements in factories using the PDCA method. It streamlines and digitizes workflows, automates notifications to prompt actions, and allows manufacturing companies to retain and utilize knowledge across the organization.

## 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



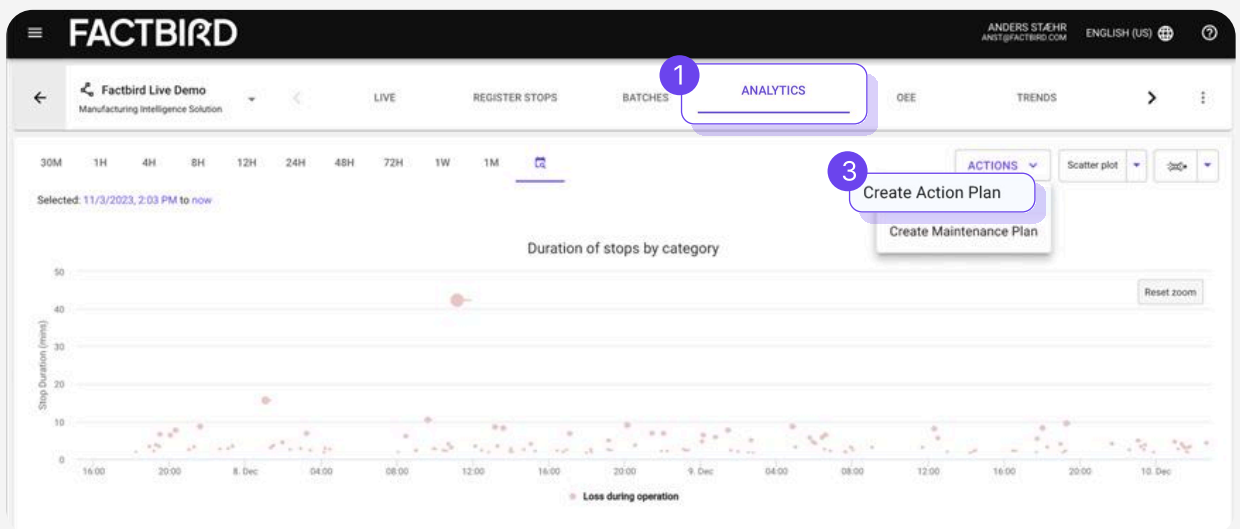
2. **"Action Plans"** page will be shown. Click **"+ACTION PLAN"** button to create an action plan.



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.

### 1 Go to ANALYTICS and create action plan

- 1b
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”.



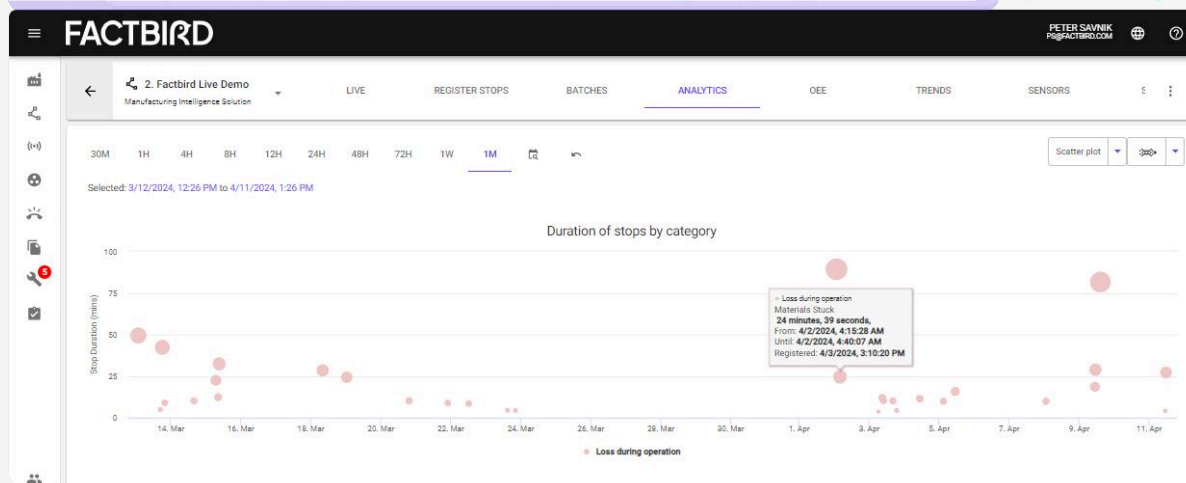
## 2 Fill out the form to create an action plan

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...>



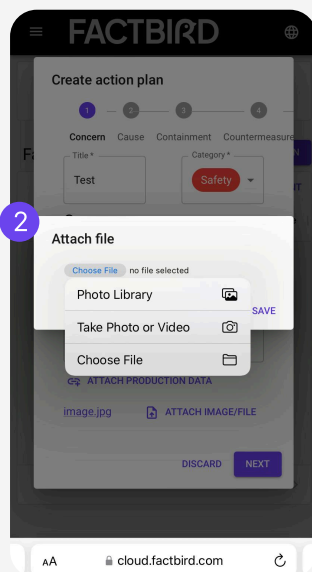
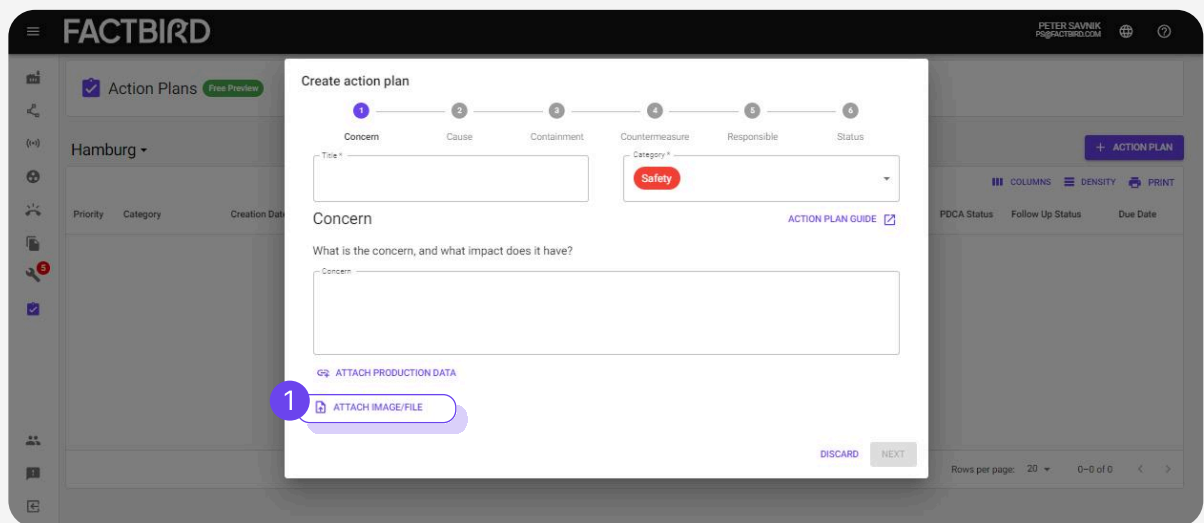
- **ATTACH IMAGE/FILE:** Relevant image/file (e.g., JPEG, PNG, PDF, any file format) can be uploaded. Multiple files and images can be uploaded by choosing a file and saving them one by one.

# 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.

The screenshot shows the 'Create action plan' form in the FACTBIRD application. The progress bar at the top indicates that steps 1 (Concern), 2 (Cause), 3 (Containment), and 4 (Countermeasure) are completed, while step 5 (Responsible) is the current step. The 'Responsible' section asks, 'Who is responsible for the Action Plan? Does it need to be escalated to a higher level in the organization?'. Below this is a 'New directory' section with a dropdown menu labeled 'Assigned to'. A purple box highlights the 'ACTION PLAN GUIDE' link. The background shows a table with columns for 'PDCA Status', 'Follow Up Status', and 'Due Date'.

- 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.

The screenshot shows the 'Create action plan' form in the FACTBIRD application. The progress bar at the top indicates that steps 1 (Concern), 2 (Cause), 3 (Containment), 4 (Countermeasure), and 5 (Responsible) are completed, while step 6 (Status) is the current step. The 'Status' section asks, 'Set a due date and select the current status of the Action Plan. Below, you can select how often you wish to follow up on the Action Plan and how many follow-ups have been completed.' Below this is a 'Status' section with a pie chart showing four segments: 'P' (Planned), 'D' (Done), 'C' (Cancelled), and 'I' (In Progress). The 'WEEKLY' label is highlighted. To the right of the pie chart is a 'Due Date' field with a calendar icon and a 'Follow-up interval' dropdown menu. The background shows a table with columns for 'PDCA Status', 'Follow Up Status', and 'Due Date'.

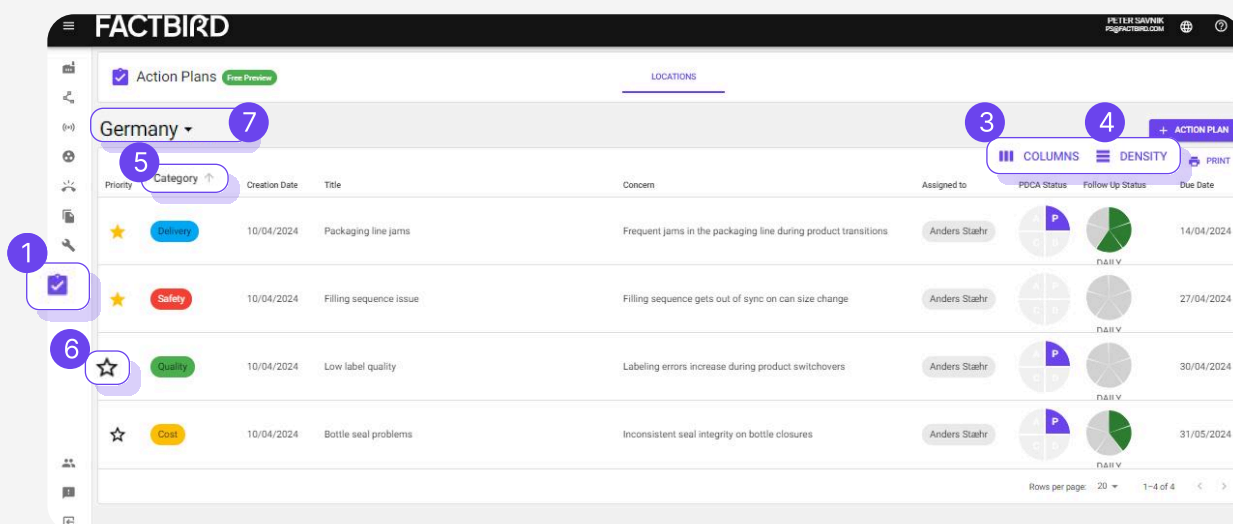
- Set a due date and select the current status from the pie chart to visually indicate the status.
- Select a follow-up interval and click on the pie chart to visually indicate the status and click on **“SAVE”**

The screenshot shows the 'Create action plan' form in the FACTBIRD application. The progress bar at the top indicates that steps 1 (Concern), 2 (Cause), 3 (Containment), 4 (Countermeasure), 5 (Responsible), and 6 (Status) are completed. The 'Status' section asks, 'Set a due date and select the current status of the Action Plan. Below, you can select how often you wish to follow up on the Action Plan and how many follow-ups have been completed.' Below this is a 'Status' section with a pie chart showing four segments: 'P' (Planned), 'D' (Done), 'C' (Cancelled), and 'I' (In Progress). The 'WEEKLY' label is highlighted. To the right of the pie chart is a 'Due Date' field with a calendar icon and a 'Follow-up interval' dropdown menu. The background shows a table with columns for 'PDCA Status', 'Follow Up Status', and 'Due Date'.

### 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.



# 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.

**Edit Action Plan**

Title \*  
Filler issue at line 3

Category \*  
Quality

Description (4)

**Tasks (0/3)**

- ☐ Internal meeting with maintenance team
- ☐ getting advice from machine supplier
- ☐ follow up on containment

New task

**Details**

Created Thu Apr 11 2024 by 008f6a7f-aede-40d0-a9df-96dae8dfa4a

Due Date  
04/11/2024

Follow-up interval  
Days

DAILY

**Germany** ☆  
Assigned to

**Hamburg** ☆  
Assigned to  
nr@onboarding@factbird.com

CANCEL SAVE



# 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.

**Edit Action Plan**

**Title**  
Filled issue at line 3

**Category**  
Quality

**Description (4)**

**Concern**  
Filling machine is stopping all the time

**Cause**  
Switch is shutting off

**Containment**  
Put the tape around it

**Countermeasure**  
Investigating

**Tasks (0/0)**

**Details**

Created Thu Apr 11 2024 by 008f6a7f-aede-40d0-a9df-96dae8fda4a

**Due Date**  
04/11/2024

**Follow-up interval**  
DAILY

**New directory** ☆

Assigned to  
nr+salesdemo@blackbird.online

**ESCALATE**

**MAIL**

CANCEL SAVE