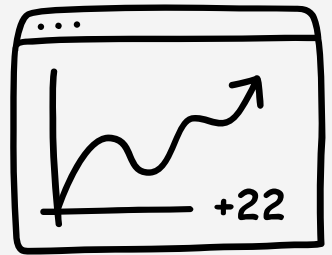
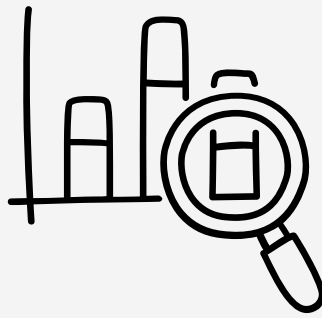
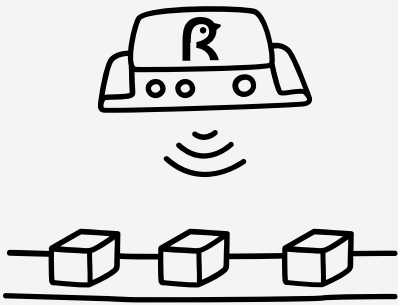


FACTBIRD

USER GUIDE | Action Plans-Preview



OEE

USER GUIDE

Action Plans

What is Factbird Action Plans module?

Factbird Action Plans is a module 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.



Tool for ensuring CI (Continuous improvement) actions are completed.



Streamline and digitize action plans for problem solving and CI initiatives.



Preserve 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 quality task** - Streamline quality control and documentation tasks with Factbird analytics. Upload photos containing quality-related data (analytics, metrics, batch/product-specific) and archive them in the cloud.

USER GUIDE

Action Plans

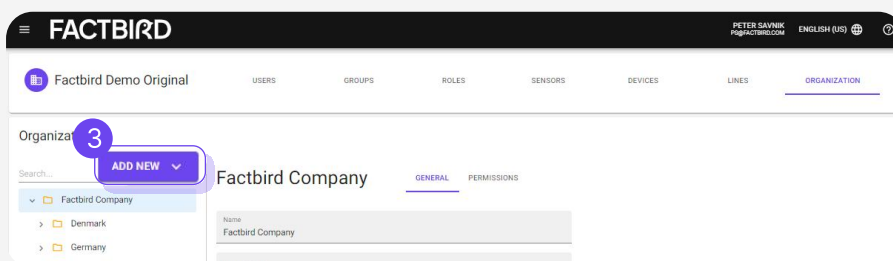
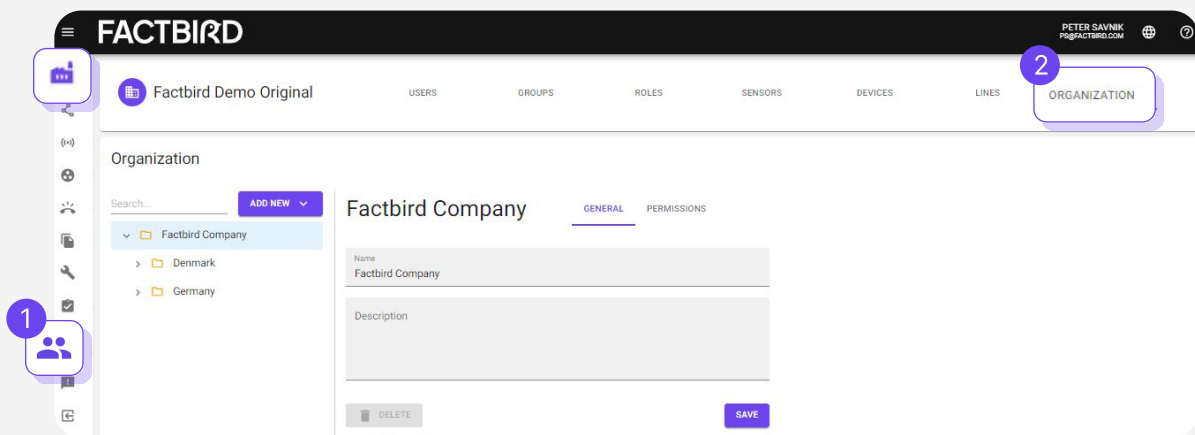
1

Confirm your organization module is activated

To use the Action Plans module, the Organization module needs to be activated.

If you do not see **"ORGANIZATION"** tab on the **"Administration"** page, or **"Organization"** in the top left corner, please contact Factbird to activate the Organization module.

If you already have Organization module, please proceed to step 2.



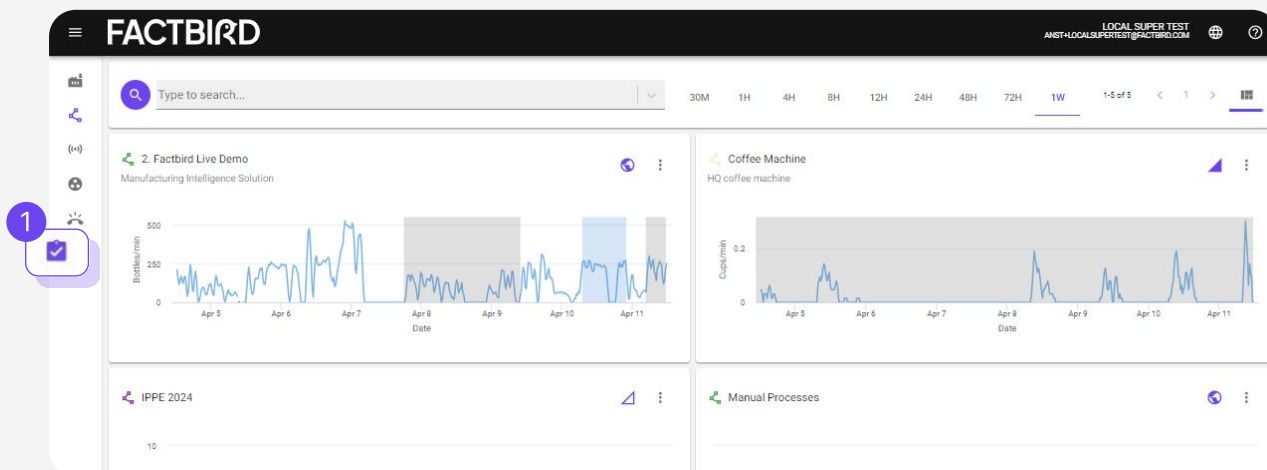
USER GUIDE

Action Plans

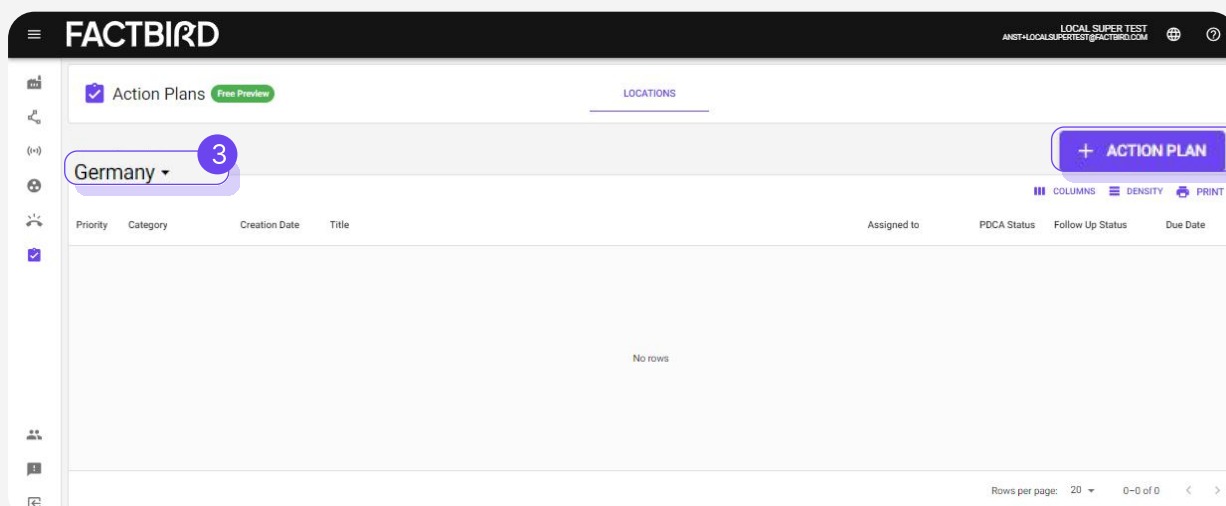
2a

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.

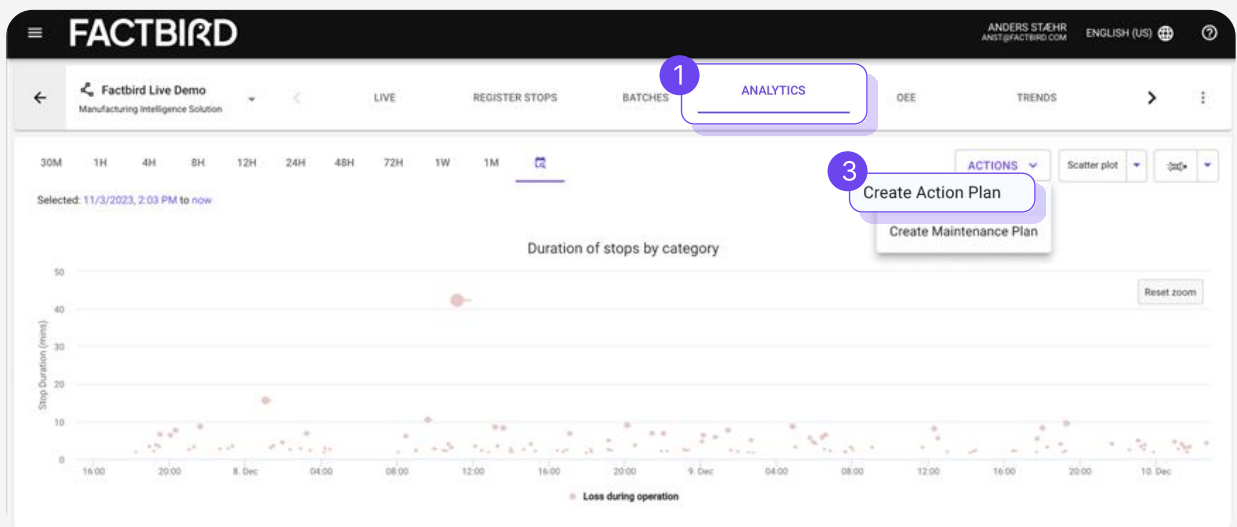


3. By selecting a location (e.g., departments, business units, sites), you can create action plans for that location. Locations (e.g., departments, business units, sites) can be added and edited on the **"ORGANIZATION"** tab on the **"Administration"** page.

2b

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”.



USER GUIDE

Action Plans

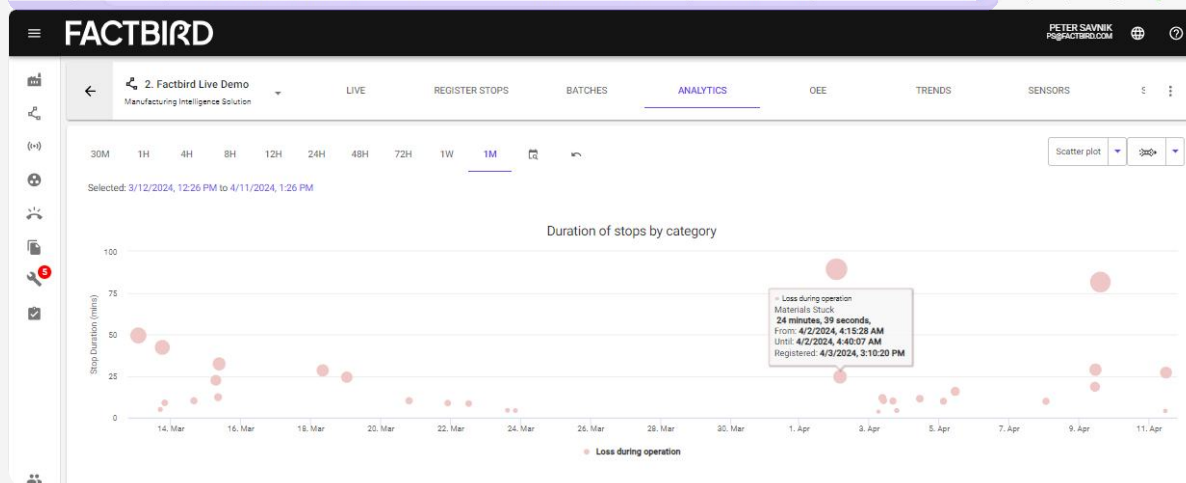
3 Fill out the form to create an action plan

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...>



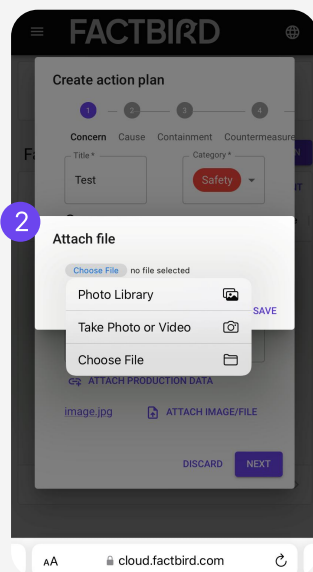
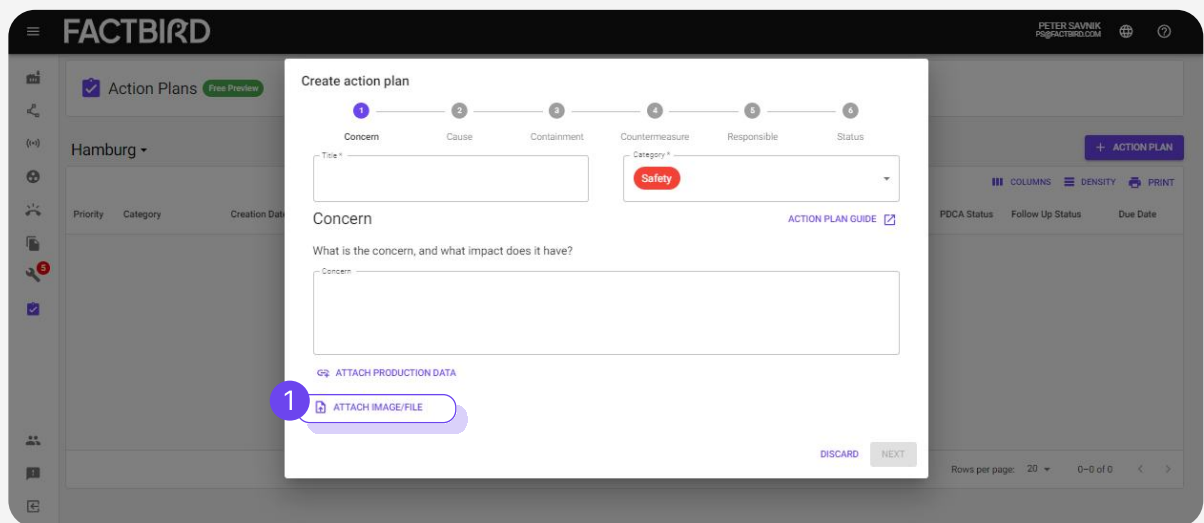
- **ATTACH IMAGE/FILE:** Relevant image/file (e.g., JPEG, PNG, PDF, any file format) can be uploaded. Multiple files and images can be uploaded by choosing a file and saving them one by one.

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 'Priority', 'Category', and 'Creation 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.

This screenshot is identical to the previous one, showing the 'Responsible' step. The 'Assigned to' dropdown menu is now populated with a list of names, and a purple box highlights the 'Responsible' step in the progress bar.

- 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 'Status' step of the 'Create action plan' form. The progress bar indicates that steps 1 through 5 are completed, and 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.' There are two pie charts for selecting status: one labeled 'WEEKLY' and another labeled 'MONTHLY'. A 'Due Date' field is set to '04/25/2024', and a 'Follow-up interval' dropdown is set to 'Weeks'. The background shows a table with columns for 'Status', 'Follow Up Status', and 'Due Date'.

4

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 left sidebar with a menu, a top header with the FACTBIRD logo and user information, and a main content area. The main content area has a filter bar at the top with a location dropdown set to 'Germany' (callout 7) and a '+ ACTION PLAN' button. Below the filter bar are 'COLUMNS' and 'DENSITY' controls (callouts 3 and 4). The main table lists action plans with 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 yellow star (callout 6). The table shows four action plans, all assigned to 'Anders Staehr'. The bottom right corner indicates '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

5

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)

2 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-96dae8fda4a

Due Date
04/11/2024

Follow-up interval
Days

DAILY

Germany ☆
Assigned to

Hamburg ☆
Assigned to
nr*onboarding@factbird.com

CANCEL SAVE

6

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.

FACTBIRD

PETER SAURER

Edit Action Plan

Title *
Filler 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-96dae8fd9a4a

Due Date
04/11/2024

Following-up Interval
Days
DAILY

New directory ☆

Assigned to

New directory ☆

Assigned to
nr+salesdemo@blackbird.online

ESCALATE

CANCEL SAVE