Actions

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CONTACT Software

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Contents

CHAPTER 1

Introduction

An essential building block for continuously improving products and processes is a systematic, IT-supported approach to managing actions. You can use *CONTACT Actions* to manage actions and control their implementation.

You can

- correlate actions with other specialised objects, such as products or projects.
- assign actions to a defect entry so that defects can be rectified efficiently.
- assign a person responsible for implementation and an editor to an action.
- subdivide complex actions into individual detailed actions.

The processing of an action is controlled by a *status network* (page 5) (New, Execution, etc.). With this network you can manage the different degrees of processing development of each individual action.

CHAPTER 2

System access

The *Quality –> Actions* menu item in the navigation tree takes you to where you can manage actions. Using the appropriate standard operations, this menu item enables you to create new actions or research actions that have already been defined, e.g. to edit these or for information purposes.

Other accesses:

- **Possible relationships of an Action** You can find all actions assigned to a product, project or part in the corresponding *Action* tab of the data sheet of one such context object. In a context such as this, you can also capture new actions which are thereby automatically assigned to the context object. For a complete overview of which specialised objects an action can be correlated with, see section *Relationships* (page 8).
- **The personal *Task Manager*** All actions for which you are responsible or are entered as the Editor are displayed to you in your personal *Task Manager*. You can find details on using the *Task Manager* in the user manual under *Task Manager*.

CHAPTER 3

Master data

In the standard version, actions are described using the following attributes, which are shown in the data sheet and the table listing the actions. One should take into consideration that some of the statements concerning *New/Change* and *Search* can differ.

- ***ID*** The *ID* uniquely identifies an action. It is automatically assigned when an action is created and can no longer be changed afterwards.
- ***Status*** Name of the status (New, Execution, etc.) currently held by the action. This attribute can only be changed via the *Status change* operation (for information on this, see the *Status network* (page 5) section). When being created, the action automatically has the *New* status.
- ***Name*** The name is a short contextual description of the action and is a mandatory field.
- ***Parent Action*** Reference to the parent action if it is a detailed action. You can select this either using a catalogue or it is automatically entered by the system if the data is created in the relational context of a parent action.
- ***Product*** Reference to the product if it is an action for a product. You can select the product either using a catalogue or it is automatically entered by the system if the data is created in the relational context of the product concerned.
- ***Part*** Reference to a part master record if the action was defined for a component or an assembly. You can select the part either using a catalogue or it is automatically entered by the system if the data is created in the relational context of the corresponding part.
- ***Project No.*** Reference to a project if the action was defined for a project context. You can select the project no. either using a catalogue or it is automatically entered by the system if the data is created in the relational context of a project.
- ***Task No.*** Reference to a task if the action should contribute to resolving a task. You can select the task no. either using a catalogue or it is automatically entered by the system if the data is created in the relational context of the corresponding task.
- ***Responsible*** Name of the user responsible for implementing the action. You select the responsible person using a catalogue. The field is mandatory.
- ***Editor*** Name of the user who should implement the action. You select the editor using a catalogue.
- ***Description*** Description of the action. You can enter all the relevant details as free text here.
- ***To be finished until*** Estimated deadline, by when the action must be implemented.
- ***Finished at*** Deadline on which the implementation of the action is closed.
- ***Costs*** Estimated costs that will be required to implement the action.
- ***Currency*** Here you can define the currency in which the costs are calculated. Euro (EUR) is the preset currency. You select the currency using a catalogue.
- ***Effort (Hrs.)*** Estimated labour costs that will be required to implement the action.

- ***created by*** Name of the user who defined the action. The attribute is automatically entered by the system and can be found in the data sheet on the *Change log* tab.
- ***created on*** Date and time when the action was defined. The attribute is automatically entered by the system and can be found in the data sheet on the *Change log* tab.
- ***last modified by*** Name of the user who last changed the action. The attribute is automatically entered by the system and can be found in the data sheet on the *Change log* tab.
- ***last modified on*** Date and time when the action was last changed. The attribute is automatically entered by the system and can be found in the data sheet on the *Change log* tab.

CHAPTER 4

Status network

An action can have different statuses. The status of an action provides information about which processing status the action is currently in. Moreover, for each status, you can specify which subsequent status can be selected.

The following statuses are defined in the standard version:

New The action has just been created and its data is being captured.

Execution The action has this status for as long as it is being processed.

Discarded The action is set to the *Discarded* status if the action should not be implemented.

Completed The action is set to the *Completed* status if its solution was implemented successfully.

Status transitions

The graphic below shows all the statuses defined in the system as well as each of the status transitions specified by the system.

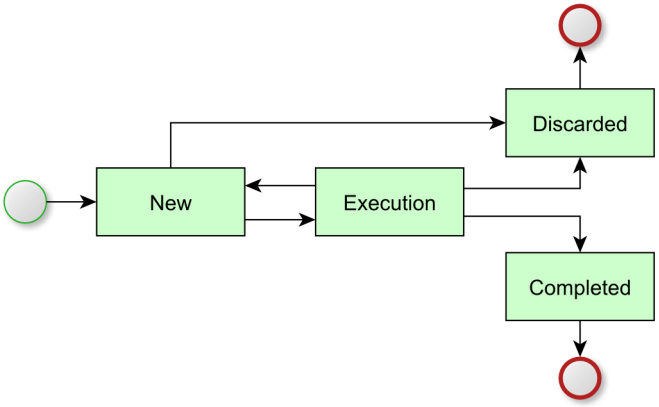

Fig. 4.1: Status network of an Action

Rules and automatic operations for parent actions

- A parent action can only then change to the *Completed* status if all of its detailed actions have taken on the *Completed* or *Discarded* status beforehand.
- If a parent action is set to the *Discarded* status, all of its detailed actions are automatically set to the *Discarded* status.

Rules and automatic operations for detailed actions

- A detailed action can only then be set to the *Execution* status if its parent action has the *Execution* status.

CHAPTER 5

Operations

In addition to standard operations such as *New...*, *Change...*, *Search...*, etc., you can run the *Action overview* operation in the context menu of the defect entry.

The *Action overview* operation opens a two-part view of the object relationships of the selected action. The upper section shows you, in the form of subordinate structure nodes, all the defect entries and detailed actions with which the selected action has a relationship.

In the lower section of the structure diagram, there is a table listing all of the other specialised objects (e.g. documents or engineering changes) to which the action has been assigned. For information on this, also see section *Relationships* (page 8).

All specialised objects that can be displayed in this structure overview can also be displayed as a tab in the action data sheet.

Relationships

An action can be correlated with other specialised objects, such as projects, products or parts. In particular, you can assign the actions that are possible or necessary to rectify defects to a defect entry. The graphic below shows with which specialised objects an action can be correlated in the standard version.

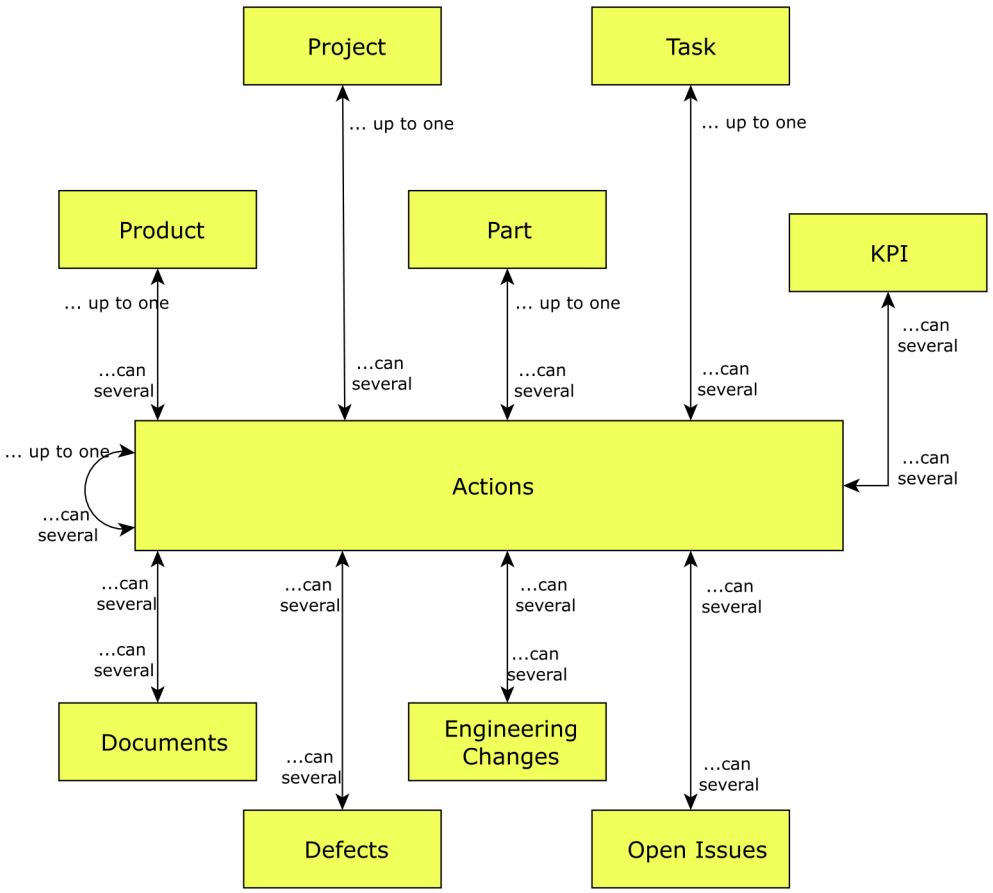

Fig. 6.1: Relationships of an Action

The network of relationships can be differentiated into two relationship types. On the one hand, there are relationships in which the action can be optionally assigned to exactly one object of one type (e.g. product) (represented by "...up to one"), on the other hand, there are relationships in which the action can be optionally assigned to several specialised objects of the same type (e.g. documents) (represented by "...can several"). The relationships shown in the graphic are described individually below.

- ***Part*** You can assign an action to exactly one part. A catalogue selection in the master data sheet (see *Master data* (page 3)) is used to make the assignment.

- ***Product*** You can assign an action to exactly one product. A catalogue selection in the master data sheet (see *Master data* (page 3)) is used to make the assignment.
- ***Project No.*** You can optionally assign an action to exactly one project. A catalogue selection in the master data sheet (see *Master data* (page 3)) is used to make the assignment.
- ***Parent Action*** You can assign one action to exactly one parent action. A catalogue selection in the master data sheet (see *Master data* (page 3)) is used to make the assignment.
- ***Task No.*** You can assign one action to precisely one task. A catalogue selection in the master data sheet (see *Master data* (page 3)) is used to make the assignment.
- ***Detailed Actions*** You can subdivide an action into several detailed actions. There are different options for assigning a detailed action to a parent action. One option is to create a new detailed action in an identically named tab of the parent action data sheet, and thereby to assign it automatically too.
- ***Defect*** You can assign several actions to a defect entry. As a result, you can ensure that the defect entry can be processed constructively and efficiently. It is also possible in reverse – several defect entries can be assigned to a specific action if this action is suitable to efficiently edit these defect entries. There are different options for assigning an action to a defect entry. One option is to first create a defect entry via the *Quality –> New defect* menu item and then assign this to a widely defined action via drag & drop on the *Action* tab.
- ***Documents*** You can assign several documents to one action to describe the action or its methods in more detail. There are different options for assigning a document to an action. One option is to call up the *Action <-> New document* operation in the *Documents* tab of the action data sheet and assign an existing document to the action.
- ***Engineering Changes*** You can assign several engineering changes to an action if the engineering changes are necessary to implement the action. It is also possible in reverse – several actions can be assigned to an engineering change if the actions are necessary to implement the engineering change. There are different options for assigning an action to an engineering change. One option is to create a new engineering change in the *Engineering change* tab of the action data sheet, and thereby to assign it automatically.
- ***Open Issues*** You can assign open issues to an action if there are still open issues relating to the implementation of the action. It is also possible in reverse – one or more actions can be assigned to an open issue if it/they must be implemented to resolve the open issues. There are different options for assigning an action to an open issue. One option is to create a new action in the *Action* tab of the data sheet for the open issue, and thereby to assign it automatically.
- ***Key Performance Indicator (KPI)*** You can assign several actions to a KPI. The action helps to achieve the ideal values for the KPI.

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