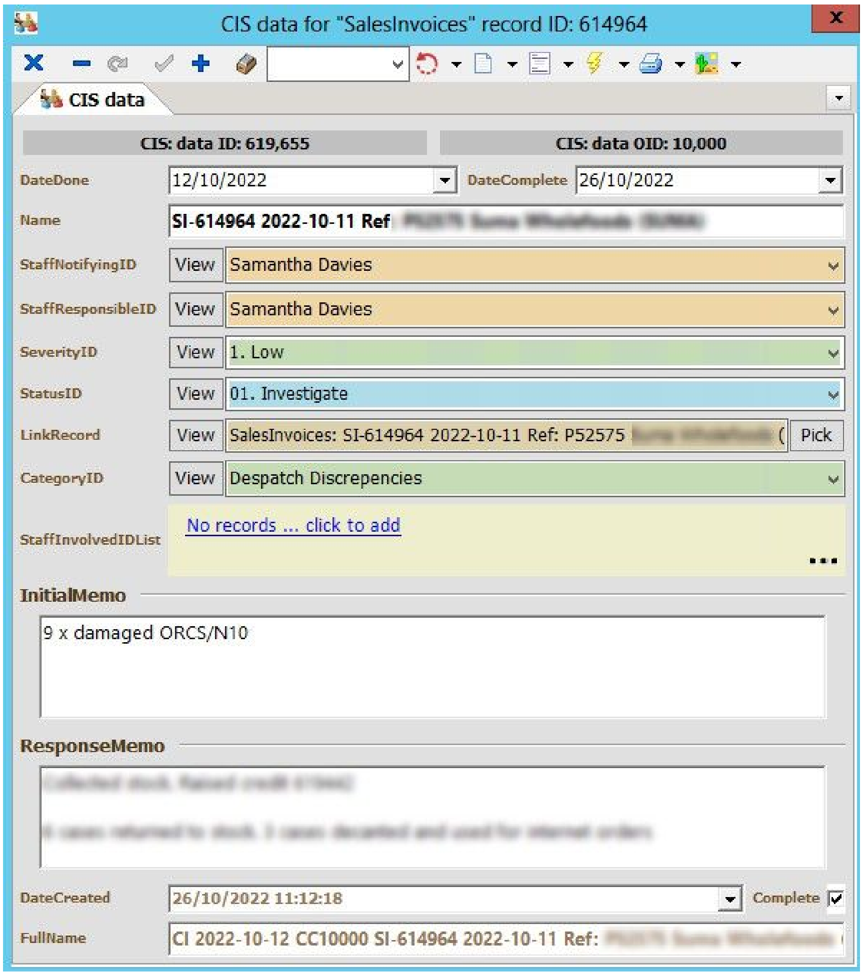
EESys Continuous Improvement System

> **EESys has a sub system called CIS which record issues and problems which occur in the day-to-day running of the business. These records can then be acted on by staff in the team, to solve the problem or issue, and particularly to improve all systems to try to stop the problem from happening again.**
> **The"CIS" (Continuous Improvement System) is part of the management culture, and allows all staff in the business to feed in suggestions about how things can be made better, or notes of things that have gone wrong so that they can be fixed.**

CIS Edit Form

The image below shows an example CIS record, which has been completed. Note that this record is**linked** to a SalesInvoice (ID 614964), and has been created by a staff member Samantha Davies.



EESys CIS Edit Form

Purpose of fields in the CIS Edit Form

OID: Stores a sequential number for each CI.

DateDone: Is set to the date that the CI was created, but can be over-written with another date by staff if necessary.

DateComplete: Stores the date staff completed working on and fixing the issue raised in the CI, and is automatically set when the user clicks the "Mark Complete" action for a CI.

Name: A description for the CI, a title.

LinkRecord: A link to some other record in the system, usually the source of the CI. For example a particular SalesInvoice or Suppler or Customer.

StaffNotifyingID: The person who created the CI.

StaffResponsibleID: The person who solved the CI. These can be the same person.

CategoryID: A category, describing the broad area the CI belongs too.

SeverityID: A "level" from "Low", to "High"

StatusID: A status from "Investigate", "In process", "Complete"

InitialMemo: Text added by the Notifying staff to explain the CI

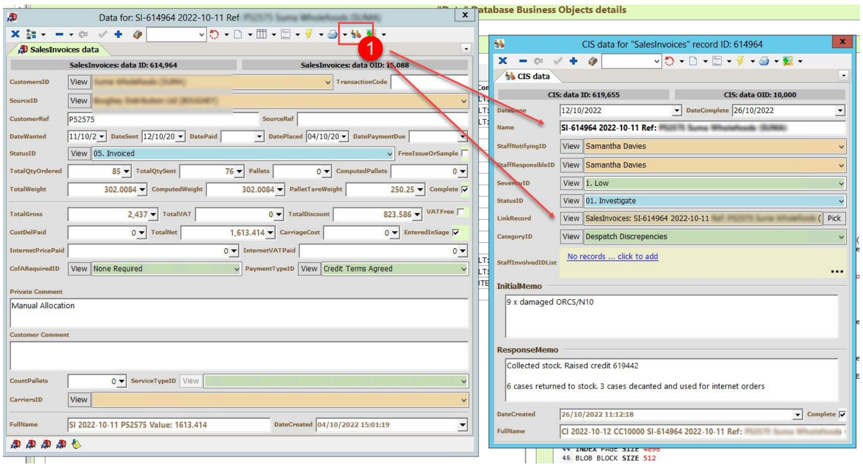
ResponseMemo: Text added by the Responsible staff to explain what they have done.

StaffInvolvedIDList: If several staff were involved in a CI, a list of their names can be added here.

DateCreated: The exact date and time the CI was created.

Complete": A tick-box, once ticked it will set the record read-only, so no further changes can be made.

Special Notes about how the CIS works



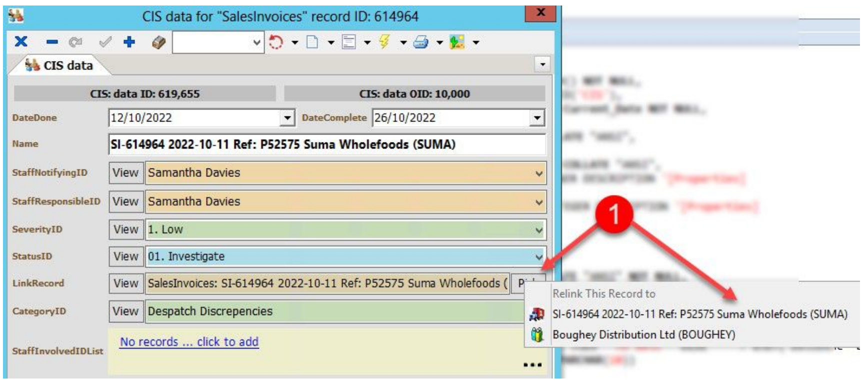
Raising a CI from another record in EESys

Adding CI's

Many Edit Forms in EESys include the Button / Action shown at 1., in the image above. "Add CI Linked to Current Record".

The best way to add a CI is to click on this button, on the record that is most closely linked to the issue or problem. If the CI is about the supply of goods to a customer, the CI will relate to one particular **SalesInvoice** in such a case find this sales invoice and click the button. If the CI relates to an issue with **Maintenance, QualityTests, StockAdjustments, Production, Packaging or StockPurchases**in each case you can directly link the CI to the original record, making the tracking and tracing of the process even easier. The "Add CI" action also auto-completes some other parts of the CI Edit Form, such as the Name.

If you create a CI directly from the CI Edit Form it will not know what value to give the LinkRecord, you should still try to set a LinkRecord if you can. You can do this by clicking on the "Pick" button next to the "LinkRecord" field as shown in the image below, and picking one of the records shown there. The Pick button always shows a list of **all currently open records.**

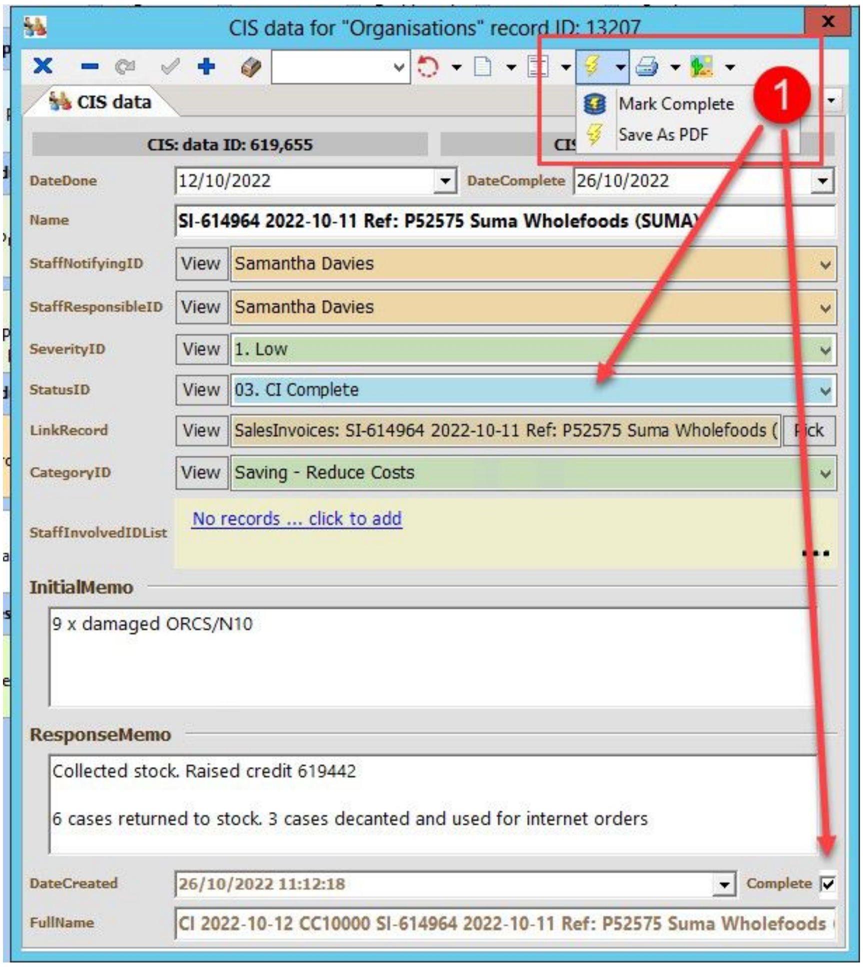


Clicking "Pick" on a LinkRecord to select it

Marking a CI "Complete"

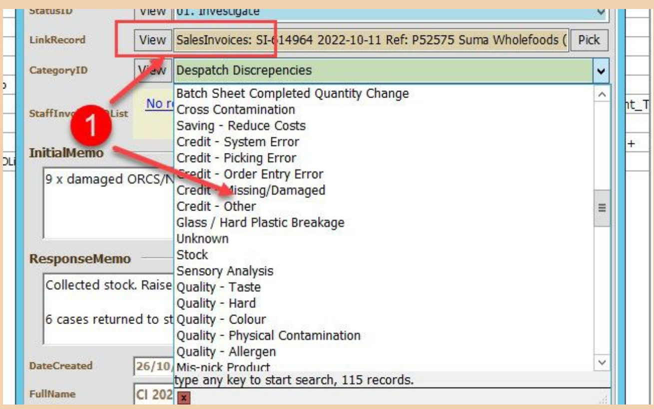
The CI Edit Form includes a special **action** shown at 1., in the image below.

Clicking on this action will first check that basic fields in the CI contain sensible values and them "complete" the CI, by settings it's Status and "Complete" tick-box.

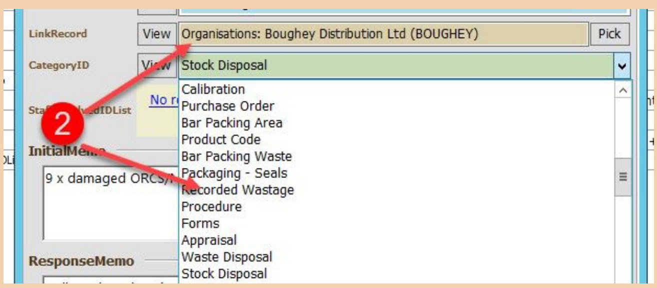


CI: Mark Complete

Setting the "Category" of CI's



LinkRecord set to a "SalesInvoice"



Link Record set to "Organisation"

Note that the lists for the 2 different records are different, set by the source of the ID.

The CI System includes a "CategoryID" field, shown in the images above, which contains a list of possible categories, to allow analysis of CIs.

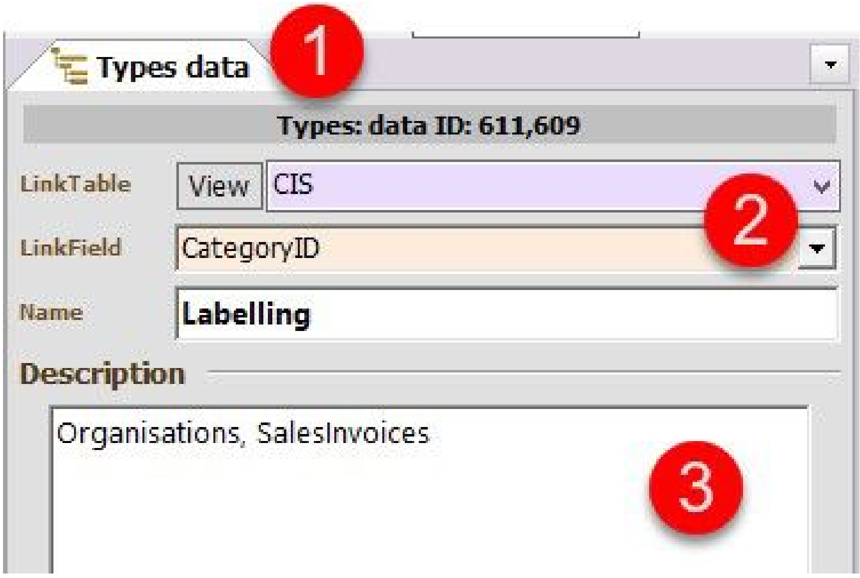
There are many possible categories, and these vary depending on the origin of the CI. For example a **Maintenance** CI, may relate some engineering issue, where as a **SalesInvoice** CI is likely to be some sort of customer-complaint.

To make it easier to pick the correct Category, the list of items in the CategoryID field **changes depending on the link-table**, so when a Maintenance record is linked, or a sales-invoice is linked different lists of categories will show.

Staff in the Quality Team can change the items in this list when they need to update it.

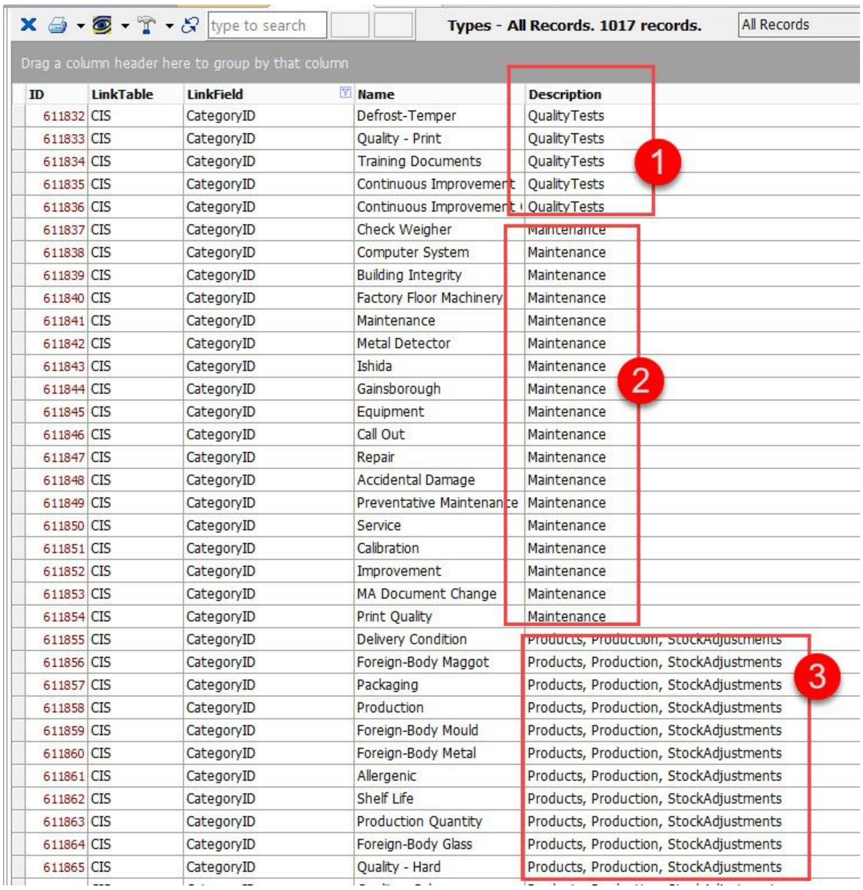
Updating "Categories" for CIs, and making them visible for different types of CI

> **Only staff with raised security-levels can undertake these actions.**



Setting visibility of a CIS Types record

1. All CIS Categories are stored as records in the "Types" data-table. Adding records here creates a new Category item that will be added to the list.
2. Set the "LinkTable" to CIS and the "LinkField" to CategoryID.
3. In the "Description" field add a **list** of the data-tables you want this Category to apply to. Note that Customers and Suppliers are "Organisations", so if you want to create a CI linked to a customer or supplier add "Organisations" to the Description. CategoryID records will **only** show in the list if the LinkRecord **matches** the description.



ID	LinkTable	LinkField	Name	Description
611832	CIS	CategoryID	Defrost-Temper	QualityTests
611833	CIS	CategoryID	Quality - Print	QualityTests
611834	CIS	CategoryID	Training Documents	QualityTests
611835	CIS	CategoryID	Continuous Improvement	QualityTests
611836	CIS	CategoryID	Continuous Improvement	QualityTests
611837	CIS	CategoryID	Check Weigher	Maintenance
611838	CIS	CategoryID	Computer System	Maintenance
611839	CIS	CategoryID	Building Integrity	Maintenance
611840	CIS	CategoryID	Factory Floor Machinery	Maintenance
611841	CIS	CategoryID	Maintenance	Maintenance
611842	CIS	CategoryID	Metal Detector	Maintenance
611843	CIS	CategoryID	Ishida	Maintenance
611844	CIS	CategoryID	Gainsborough	Maintenance
611845	CIS	CategoryID	Equipment	Maintenance
611846	CIS	CategoryID	Call Out	Maintenance
611847	CIS	CategoryID	Repair	Maintenance
611848	CIS	CategoryID	Accidental Damage	Maintenance
611849	CIS	CategoryID	Preventative Maintenance	Maintenance
611850	CIS	CategoryID	Service	Maintenance
611851	CIS	CategoryID	Calibration	Maintenance
611852	CIS	CategoryID	Improvement	Maintenance
611853	CIS	CategoryID	MA Document Change	Maintenance
611854	CIS	CategoryID	Print Quality	Maintenance
611855	CIS	CategoryID	Delivery Condition	Products, Production, StockAdjustments
611856	CIS	CategoryID	Foreign-Body Maggot	Products, Production, StockAdjustments
611857	CIS	CategoryID	Packaging	Products, Production, StockAdjustments
611858	CIS	CategoryID	Production	Products, Production, StockAdjustments
611859	CIS	CategoryID	Foreign-Body Mould	Products, Production, StockAdjustments
611860	CIS	CategoryID	Foreign-Body Metal	Products, Production, StockAdjustments
611861	CIS	CategoryID	Allergenic	Products, Production, StockAdjustments
611862	CIS	CategoryID	Shelf Life	Products, Production, StockAdjustments
611863	CIS	CategoryID	Production Quantity	Products, Production, StockAdjustments
611864	CIS	CategoryID	Foreign-Body Glass	Products, Production, StockAdjustments
611865	CIS	CategoryID	Quality - Hard	Products, Production, StockAdjustments

Example "Types" data including Description with Linked-table-names

The above image shows "CIS CategoryID" records in the Types framework table. Note how some records have the Description "QualityTests" (1), "Maintenance" (2) and "Products, Production, StockAdjustments" (3) these descriptions **limit** the contexts in which they will appear in a CIS Edit-form CategoryID drop-down.