GIGBOT QUICKSTART GUIDE

In the world of manufacturing, quality is king. Every defect not only represents a potential loss in time, materials, and labor but also threatens customer satisfaction and brand reputation. Defect tracking is the foundation of a robust quality management system, enabling teams to identify, categorize, and analyze defects to drive continuous improvement.

As a quality manager, engineer, inspector, or continuous improvement professional, you understand the critical role of data in decision-making. Yet, traditional methods of defect tracking can often feel cumbersome, inconsistent, or siloed. That's where Gigbot comes in.

Gigbot is designed to streamline defect tracking, offering a centralized platform to record, correct, and verify defects in real-time. With its intuitive interface, customizable checklists, and powerful reporting tools, Gigbot ensures that your team has the insights needed to not only resolve issues quickly but also prevent them from recurring.

By leveraging Gigbot, you can reduce defect rates, enhance collaboration, and ultimately improve the cost of quality metrics for your organization. This Quickstart Guide will walk you through the basics of using Gigbot, helping you maximize its potential to transform your quality processes.

WHAT'S INSIDE

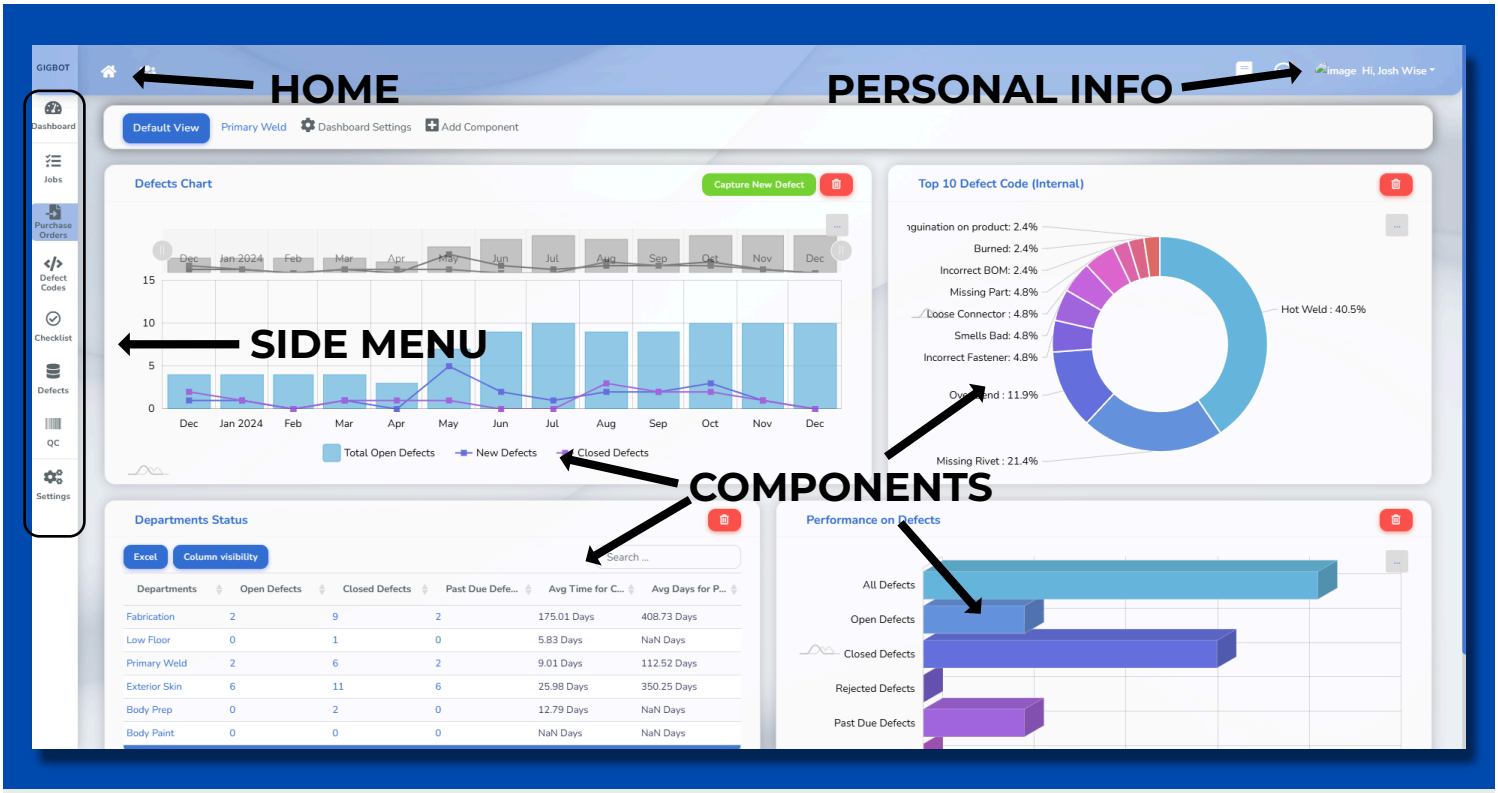
KEY CONCEPTS AND TERMS

- **Checklists**: Step-by-step workflows in Gigbot to guide inspections, corrections, and verifications.
- **Cost of Poor Quality (COPQ**): The financial impact of defects, including the cost of corrections, rework, and customer dissatisfaction.
- **Defect**: Any deviation from established quality standards that requires action to correct or improve.
    - **Correcting Defects**: Actions taken to address identified defects and bring processes or products back into compliance.
    - **Verifying Defects**: The process of confirming that corrective actions have resolved the defect and that the issue will not recur.
- **Defect Codes**: Standardized labels used to categorize and describe types of defects for easier tracking and reporting.
- **DPU (Defects Per Unit)**: A measure of defects relative to the number of units inspected or produced.
- **Jobs**: Specific tasks or processes within Gigbot where defects are tracked, corrected, and verified.
- **Labor Costs**: The additional time and effort required to identify, correct, and verify defects.
- **Parts Costs**: Expenses incurred due to defective parts, including replacements and wasted materials.
- **PPM (Parts Per Million)**: A metric used to measure defect rates in manufacturing, calculated as the number of defects per million parts produced.

DASHBOARDS

Gigbot's dashboard is your central hub for defect tracking and quality management. It provides an at-a-glance view of key metrics, actionable items, and ongoing tasks to help

you stay on top of your quality processes. Use the annotated guide below to familiarize yourself with its features.

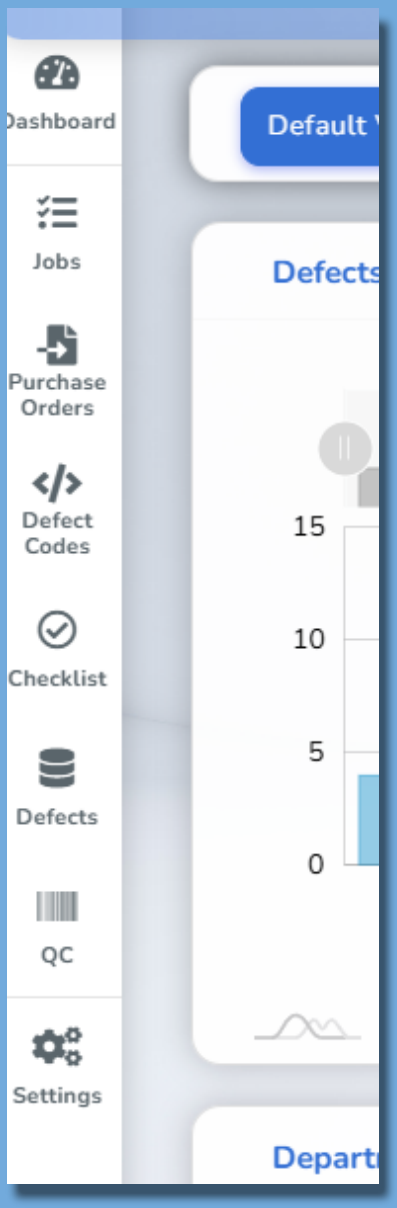


Home - This button takes you to your Optegrity home page, where you can access other Optegrity applications, view global settings, and update your user profile.

Side Menu - This menu allows you to quickly navigate through the application, providing easy access to key features like defect tracking, checklists, and reports.

Personal Info - Clicking this option lets you view and update your personal information, such as contact details, password settings, and user preferences.

Components - These are customizable containers of information that display key data and metrics at a glance, ensuring you have the insights you need right on your dashboard.



Dashboard - This button takes you back to the main dashboards.

Jobs - This is where you can add and edit manufacturing jobs.

Purchase Orders - This is where you can add and edit purchase orders.

Defect Codes - This section allows you to add and edit defect codes.

Checklist - Here, you can edit and run checklists.

Defects - This is your defect database, where you can search, view, and manage logged defects.

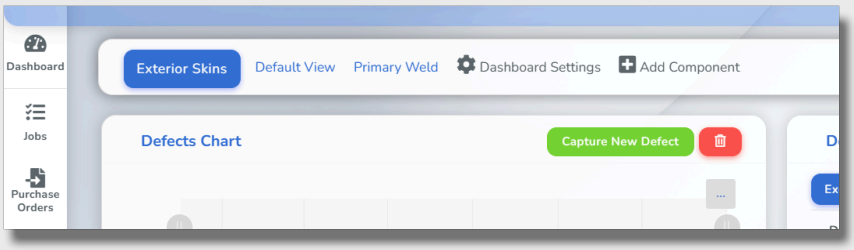
QC - This section is where you manage QC checks.

Settings - This button takes you to application specific settings.

CREATING AND EDITING DASHBOARDS

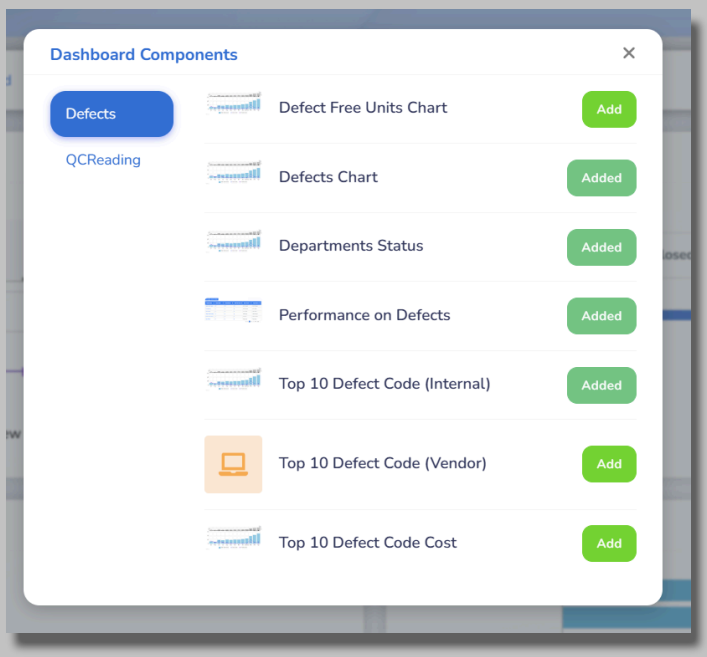
Gigbot allows you to customize your dashboards to display the most relevant information for your role. In this section, you'll learn how to create, edit, and personalize dashboards to suit your workflow.

Locate Dashboard Controls



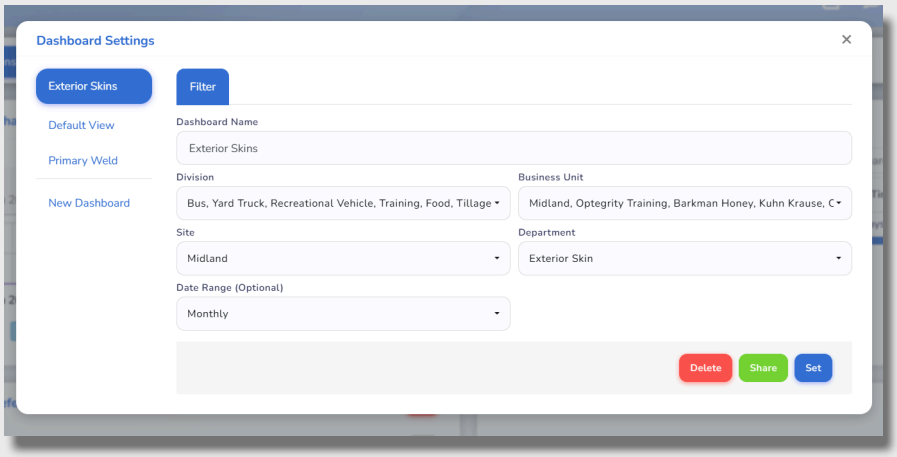
Dashboard controls are in the top-left corner of the dashboard screen. Use these controls to adjust or manage your dashboard.

Add a Component to a Dashboard

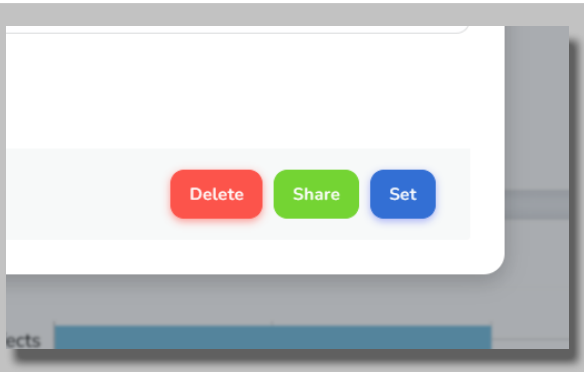


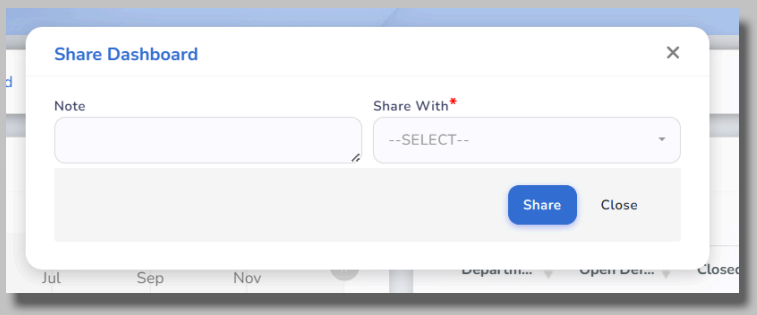
1. Click the "**Add Component**" button to bring up the component selector screen.
2. Browse the list to find the component you want to add, then click "**Add**" to place it on your dashboard.

Edit an Existing Dashboard



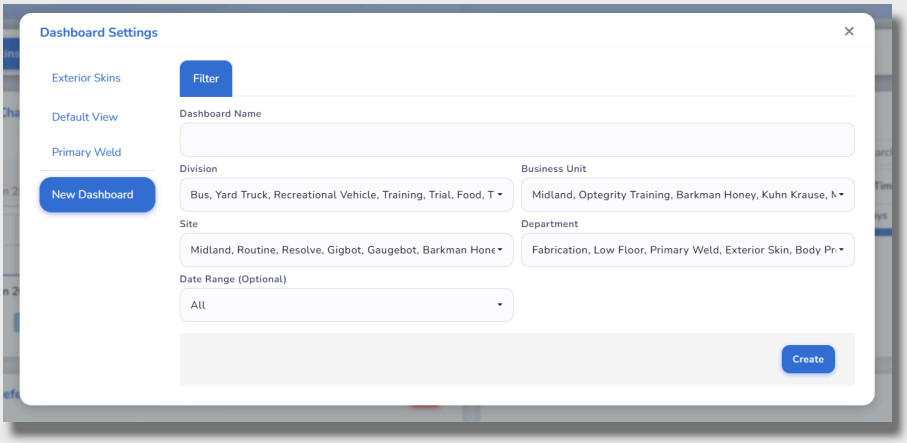
1. Click the "**Dashboard Settings**" button to open the settings popup.
2. From the list on the left-hand side, select the dashboard you want to edit.
3. Adjust the scope of data by choosing from the **Division**, **Business Unit**, **Site**, and **Department** dropdowns.





Share a Dashboard

1. In the **Dashboard Settings** popup, select the dashboard you want to share and click "**Share**".
2. Add an optional message or note in the "**Note**" section.
3. Select the user you want to share with from the dropdown box and click "**Share**".



Create a New Dashboard

1. Click "**New Dashboard**" in the **Dashboard Settings** popup.
2. Enter a name for the new dashboard and select the desired scope of data.
3. When ready, click "**Create**" to finalize your new dashboard.
4. Then begin adding components following the instructions above.

DEFECT MANAGMENT: CAPTURING DEFECTS

Capturing defects is at the heart of Gigbot's functionality, providing a streamlined approach tailored to your company's quality and continuous improvement maturity. Gigbot supports three methods of capturing defects, ensuring flexibility and scalability as your processes evolve:

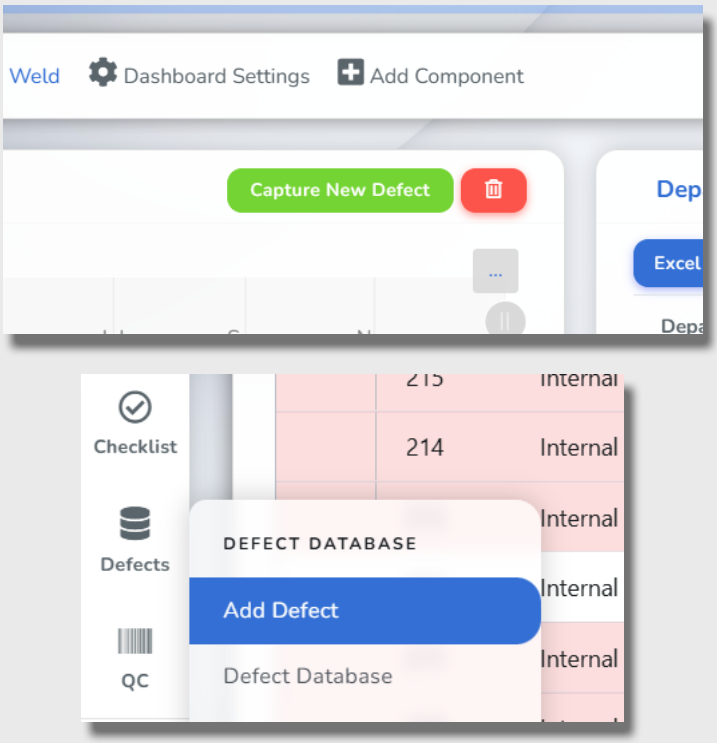
1. **Freely Capturing Defects:**
   The simplest and most foundational method, allowing users to log defects as they are discovered. This approach is ideal for companies starting their defect management journey or handling unexpected issues.

2. **Using Checklists:**
   Designed for companies with established inspection processes, this method enables users to create checklists that can be deployed at workstations or inspection gates. Non-compliant items identified during checklist reviews can be instantly converted into defects.

3. **Leveraging Routine Integration:**
   For companies at the forefront of quality management, Gigbot integrates with Routine to use standard work instructions as the basis for quality checklists. Steps labeled as "Critical to Quality" within Routine are automatically incorporated into Gigbot, eliminating the need for separate checklist management.

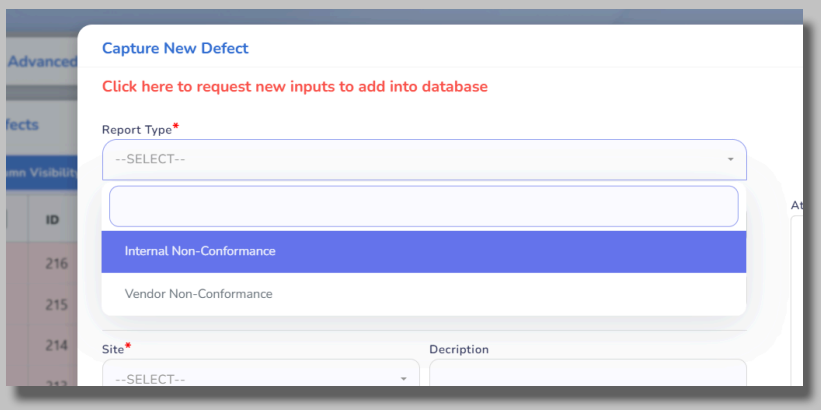
DEFECT CAPTURE METHOD 1: FREELY CAPTURING DEFECTS

Freely capturing defects is the foundation of Gigbot's defect management process. Once you've mastered this method, the other options become much easier. Follow these steps to capture a defect:



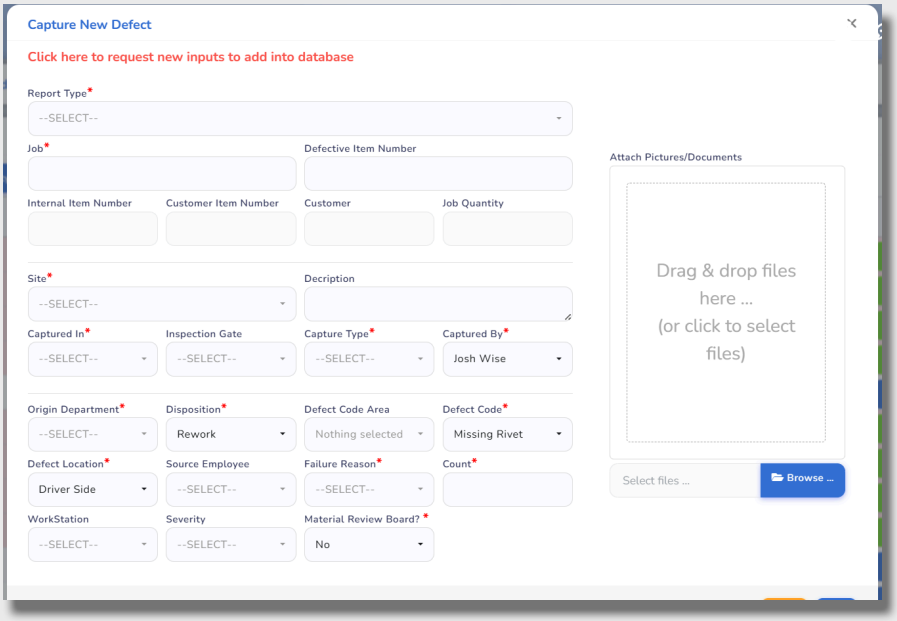
Accessing the "Add New Defect" Screen

1. Click the "**Add New Defect**" button on the Defects Chart located on the main dashboard.
2. Alternatively, hover over the "**Defect Database**" menu item in the side menu and select "**Add Defect**" from the dropdown.
3. Both options will open the "**Capture New Defect**" popup.



Selecting the Conformance Report Type

- In the popup, choose whether this is an **Internal Non-Conformance Report** or a **Vendor Non-Conformance Report**.
- For this guide, we'll focus on Internal Non-Conformance Reports as they are the most commonly used.



Filling Out the Defect Details

- Once you select the conformance report type, the popup will display fields to fill in. Fields marked with an asterisk (*) are required.

Field Descriptions:

Job*: Enter the job number where the defect occurred. This automatically populates fields like Internal Item Number, Customer Item Number, Customer, and Job Quantity.

Captured In*: Select the department capturing the defect.

Inspection Gate: If the defect was captured at an inspection gate, specify it here.

Capture Type*: Indicate the type of inspection that led to the defect being captured.

Captured By*: The name of the user capturing the defect (defaults to the current user).

Origin Department*: The department responsible for creating the defect.

Disposition*: Select what should happen to the defect (e.g., rework, scrap).

Defect Location*: Specify where on the job or unit the defect is located.

Defect Code*: Choose the appropriate defect category to aid in reporting.

Source Employee: Enter the name of the employee responsible for the defect.

Failure Reason*: Select the reason for the defect.

Count*: Specify how many times this defect occurs on the job or unit.

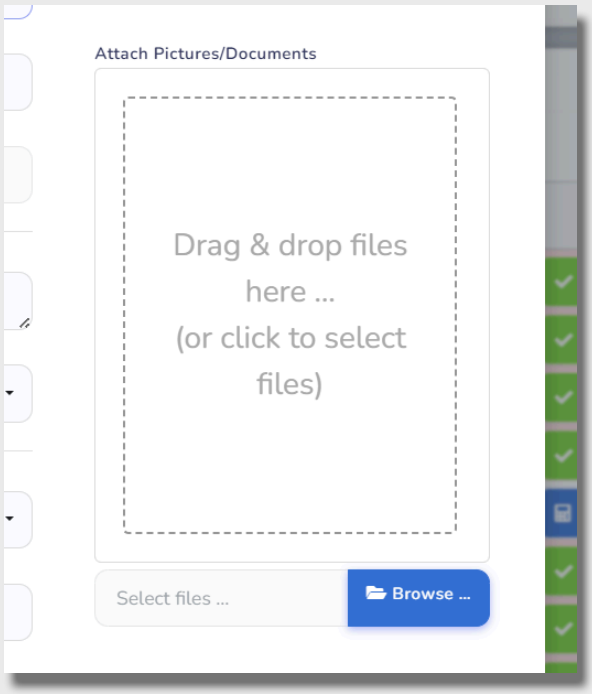
Material Review Board*: Indicate if the defect requires review by the material review board for disposition.

Workstation: Enter the workstation or work cell where the defect was captured.

Site*: Select the site where the workstation is located.

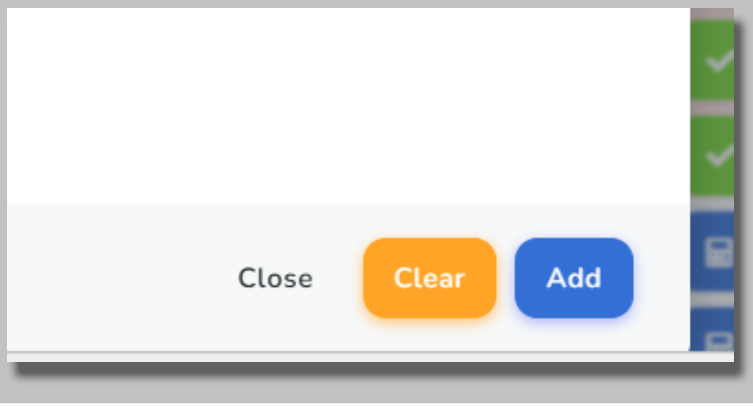
Severity: Rate the severity of the defect.

Description: Add any additional details or context about the defect.



Adding Attachments

- Upload pictures or documents to provide more context for the defect.

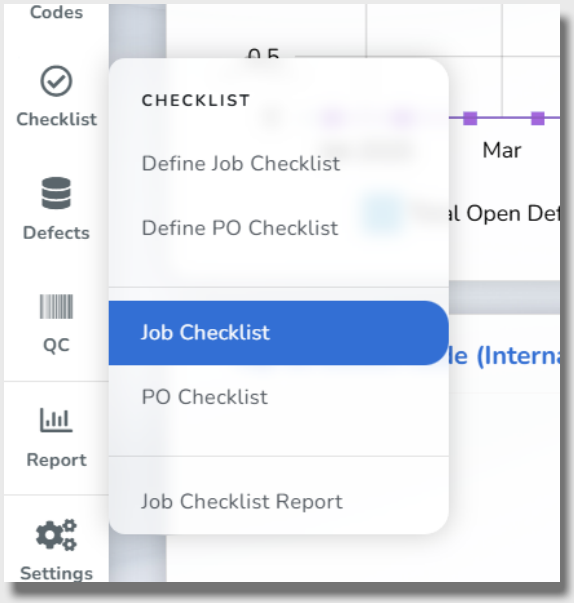


Finalizing the Defect

- Once all required fields are completed, click "Add" to save the defect in the system.

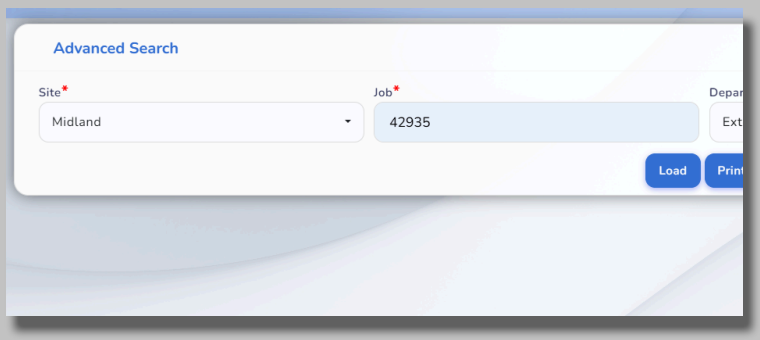
DEFECT CAPTURE METHOD 2: USING CHECKLISTS

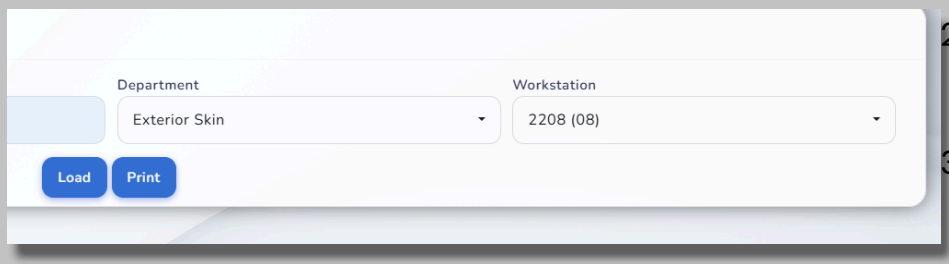
The checklist method streamlines defect capture by associating predefined checklists with specific workstations. This approach ensures consistency and efficiency in identifying and managing defects.



Navigate to the Checklist Menu

1. Hover over the "**Checklist**" menu item on the side menu and select "**Job Checklist**" from the dropdown.
2. This will take you to the **Checklist Search Screen**.

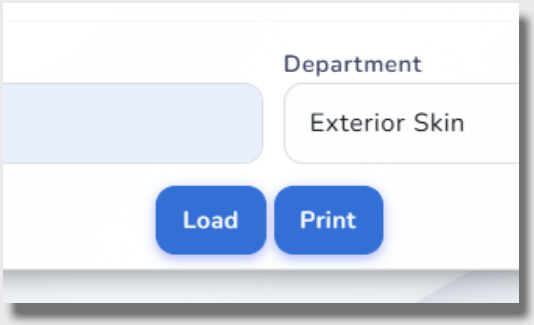




Locating the Checklist

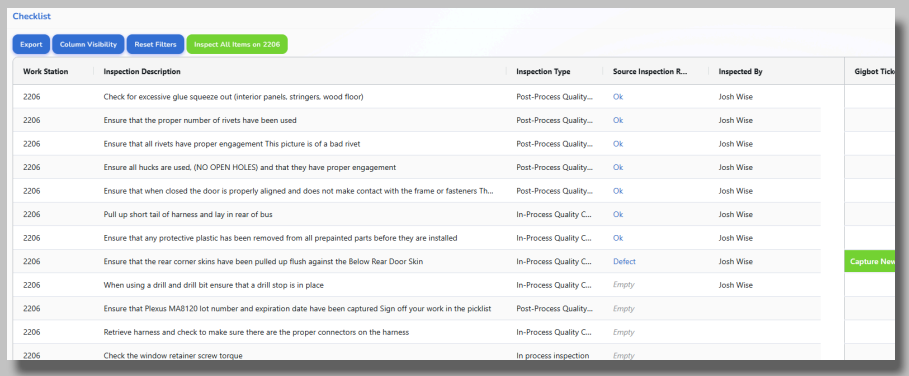
Checklists are assigned to a workstation inside a department. To open a checklist:

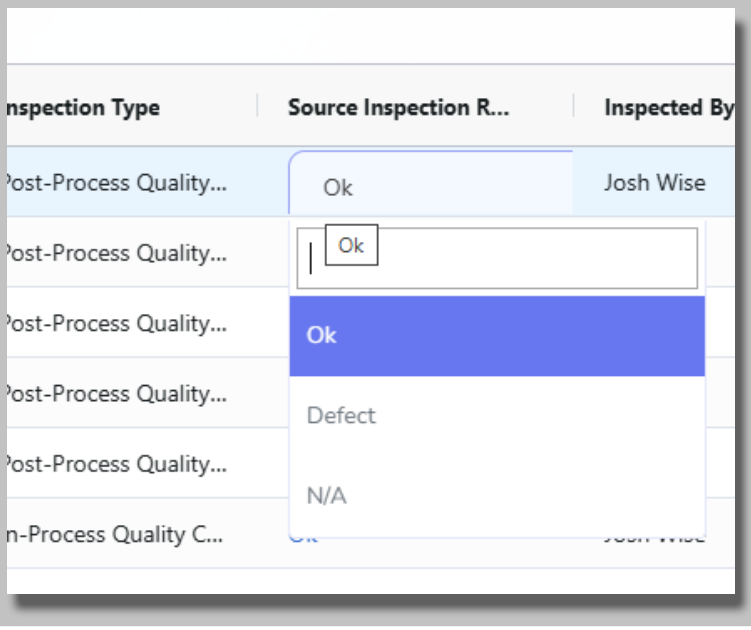
1. Select the "**Site**" from the dropdown menu.
2. Enter the **Job Number** in the **Job** field.
3. Choose the appropriate **Department** and **Workstation** where the checklist has been assigned.



Loading the Checklist

1. Click "**Load**" to display the assigned checklist.
2. Click "**Print**" to print a paper copy of the checklist.





Inspecting Items

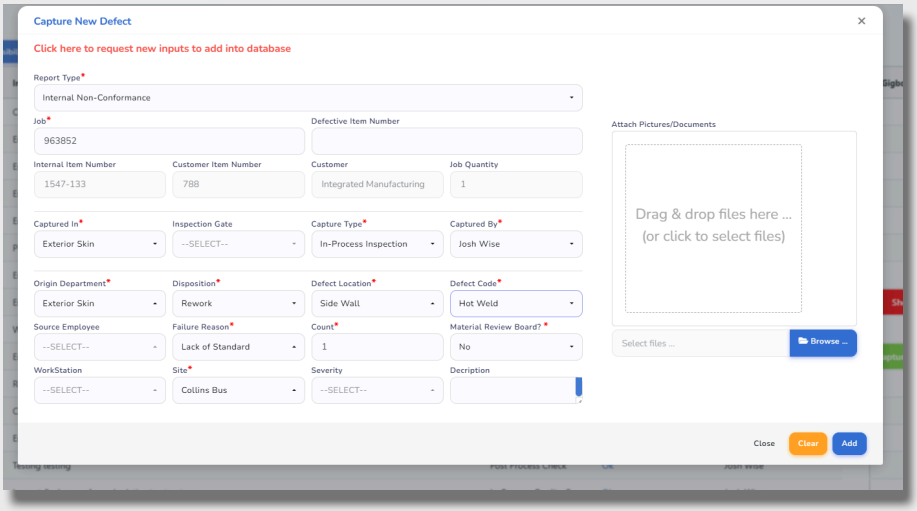
The loaded table displays a list of inspection items, with each row representing an item to review.

1. To check an item, click in the corresponding row under the "**Source Inspection Result**"column. You can select:
   - "**Ok**": If the job passes this inspection item.
   - "**N/A**": If this item is not applicable to the unit.
   - "**Defect**": If the item is non-conforming.

Capturing a Defect

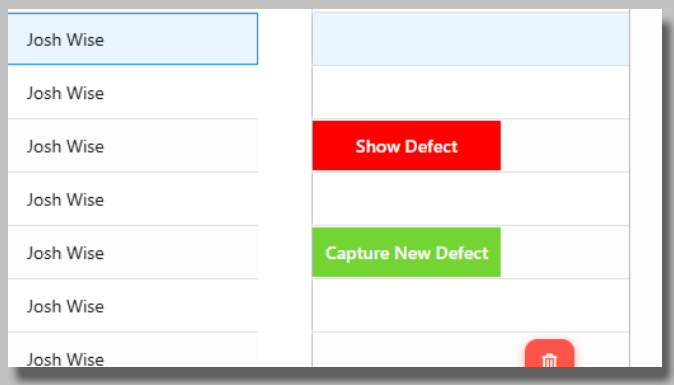
For any items marked as "**Defect**", a green "**Capture New Defect**" button will appear in the "**Gigbot Ticket**" column.

1. Click this button to bring up the "**Capture New Defect**" popup.



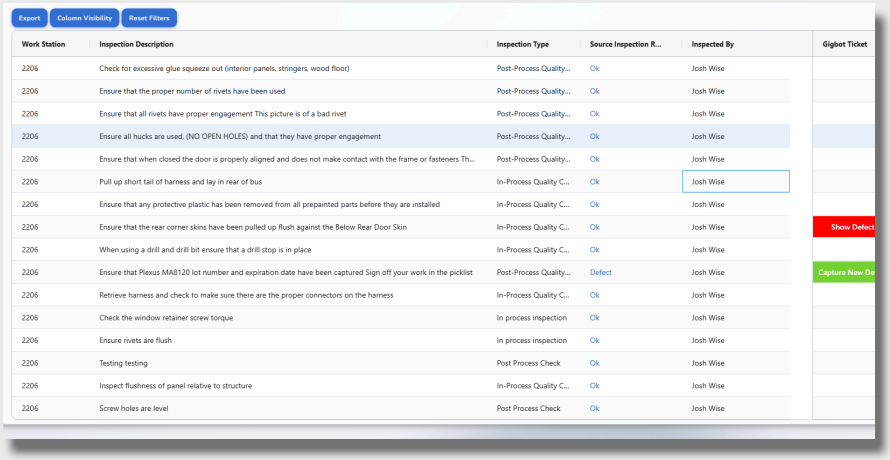
2. Fill out the defect details as outlined in the "**Freely Capturing Defects**" section.
    - Most fields will automatically populate, as the information is pulled directly from the checklist.
3. Click "**Add**" to save the defect. The popup will close, and the defect will be recorded.

Reviewing or Editing a Captured Defect



After saving a defect, the green "**Capture New Defect**" button changes to a red "**Show Defect**" button.

- Clicking "**Show Defect**" allows you to view or edit the defect as needed.



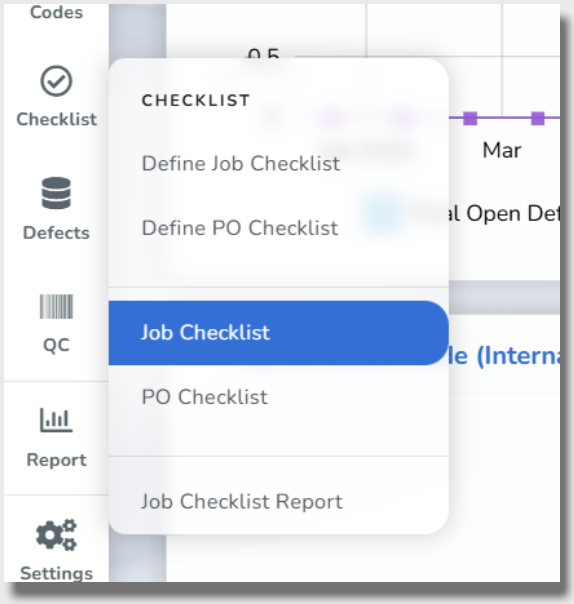
Completing the Checklist

After inspecting all items on the checklist, you can:

1. Navigate away from or close the page.
2. Enter another job number to run a checklist on a different unit.

DEFECT CAPTURE METHOD 3: USING ROUTINE INTEGRATION

This method allows you to leverage work instructions created in Routine with steps designated as "Critical to Quality" to seamlessly capture defects.



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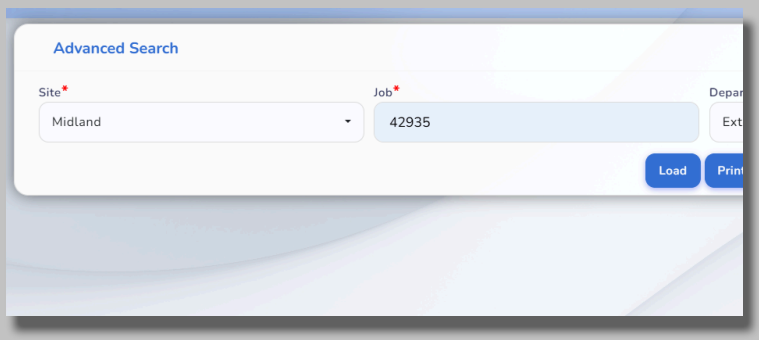
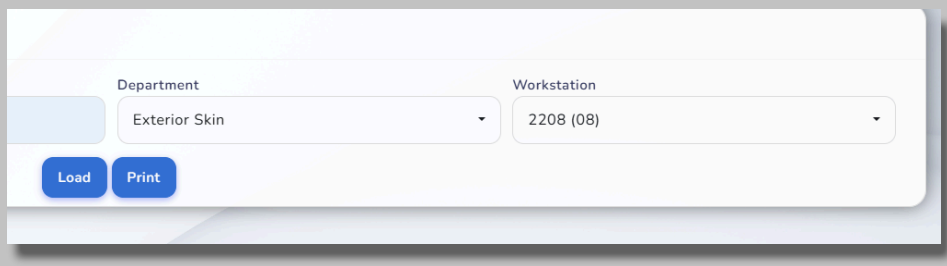
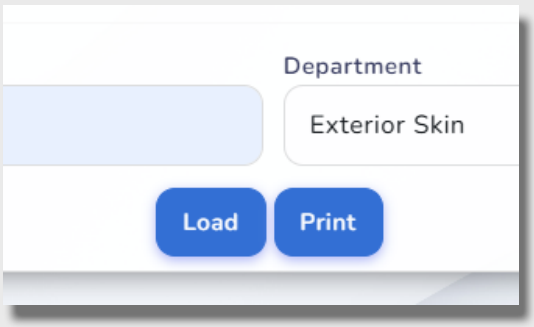




Locating the Checklist

1. Select the "**Site**" from the dropdown menu.
2. Enter the **Job Number** in the Job field.
3. Choose the appropriate **Department** and **Workstation**(s) where the "**Critical to Quality**" steps have been assigned.



Loading the Checklist

- Click "**Load**" to display the assigned checklist.
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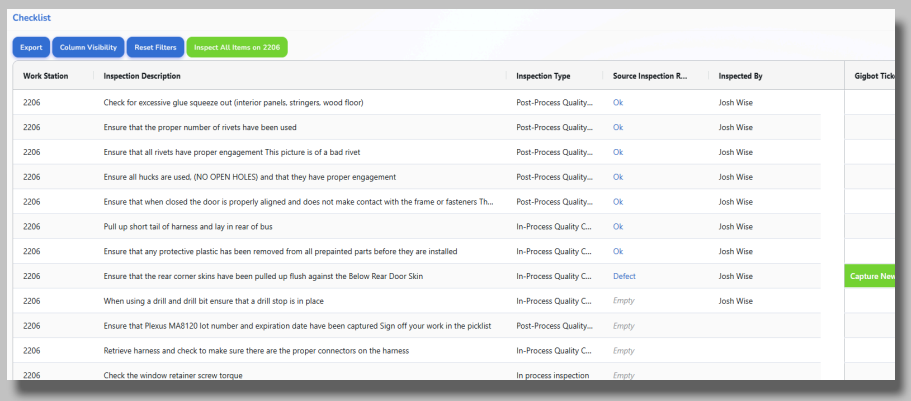

Inspecting Items

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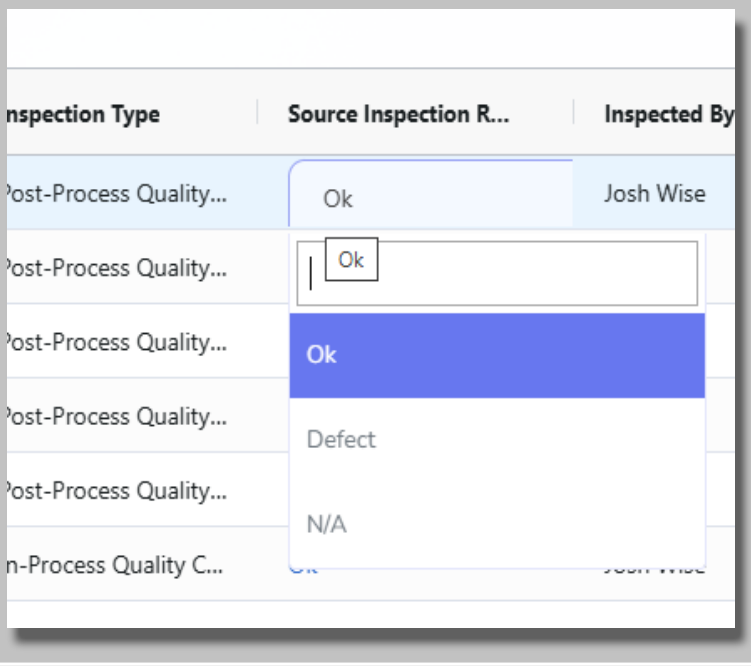

select:

- "**Ok**": If the job passes this inspection item.
- "**N/A**": If this item is not applicable to the unit.
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Capturing a Defect

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1. Click this button to bring up the "**Capture New Defect**" popup.
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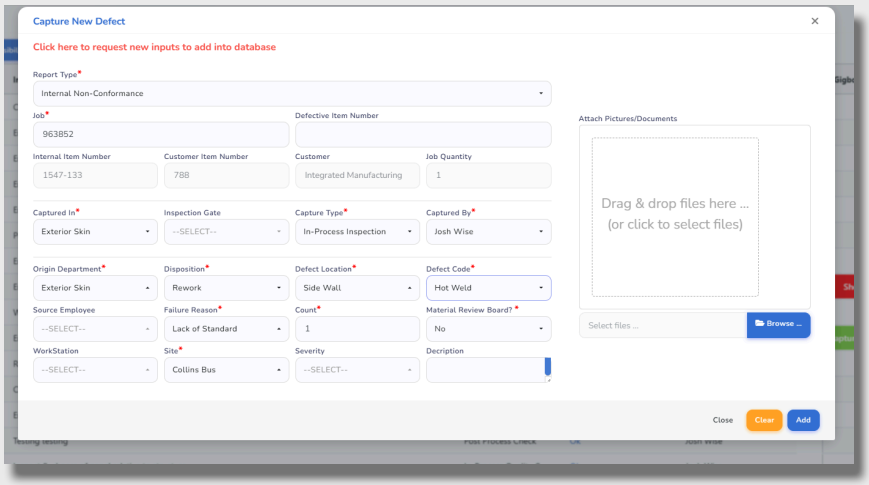
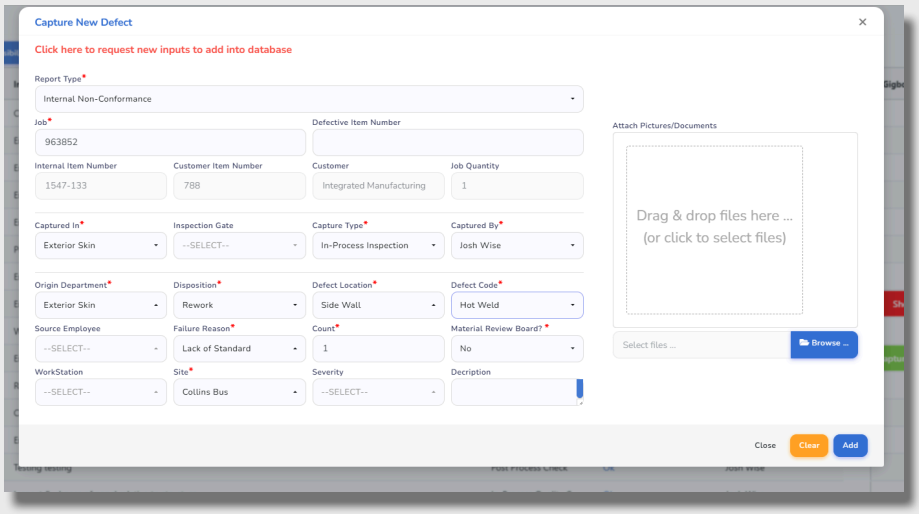
   - Most fields will automatically populate, as the information is pulled directly from the checklist.

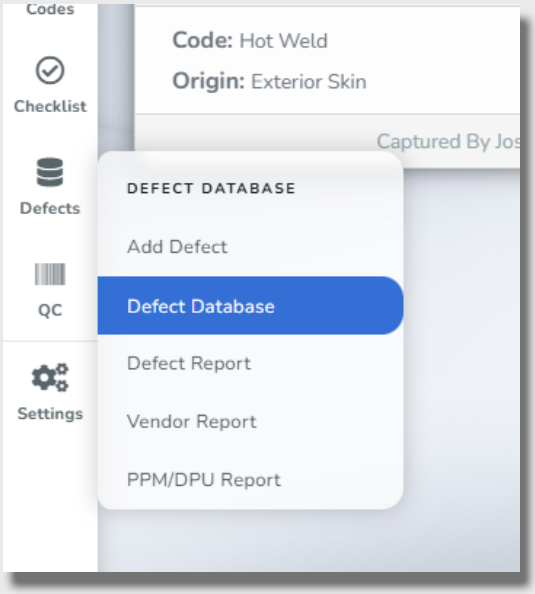




1. Click "**Add**" to save the defect. The popup will close, and the defect will be recorded.

DEFECT MANAGEMENT: DEFECT CORRECTION

Once a defect has been captured, the next step is to mark it as corrected. Follow these steps to update the defect status and capture the associated costs.



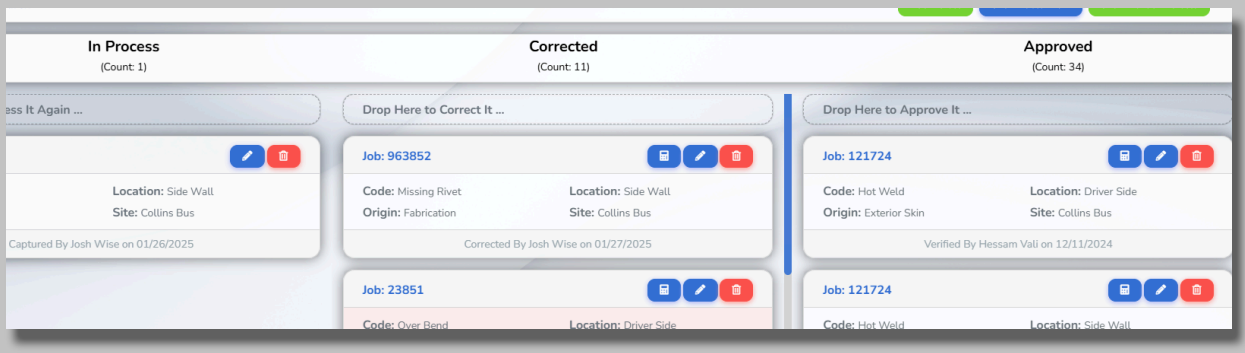
Access the Defect Database

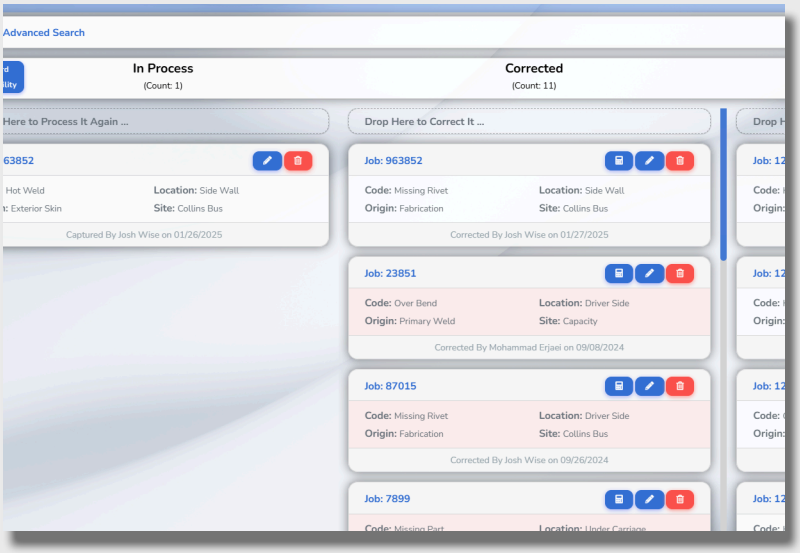
1. Hover over the "**Defects**" option on the left-hand menu and select "**Defect Database**" from the dropdown.

    - The defect database displays all defects that have been captured, with data presented in two formats: **table view** and **card view**.

Working with the Card View

- For this guide, we'll use the **card view**, which functions like a Kanban board.
- The board is divided into columns representing different stages of the defect management process:
    - **In Process**
    - **Corrected**
    - **Approved**



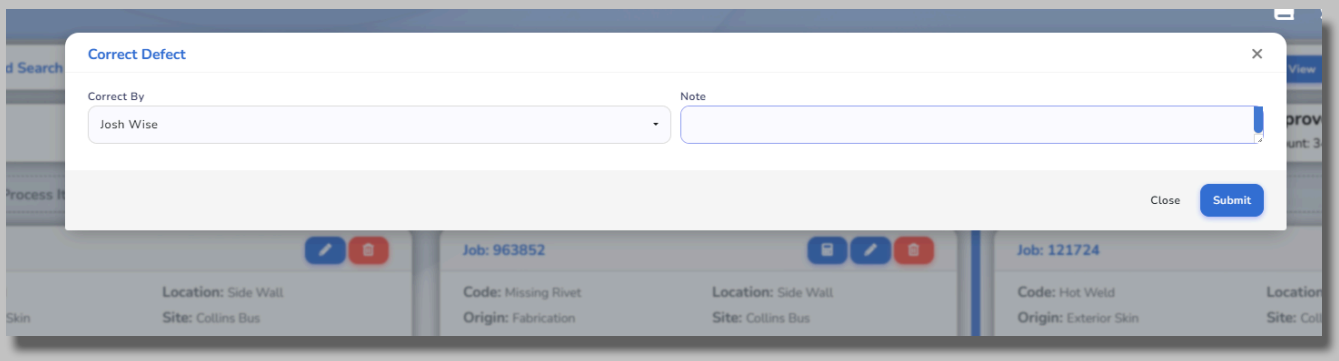


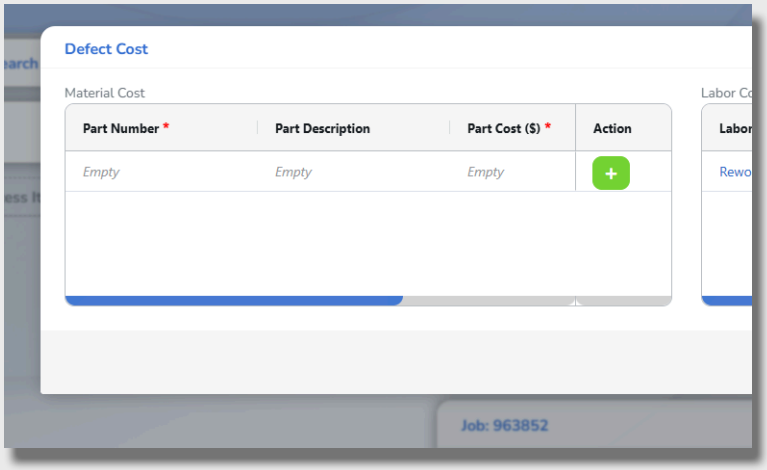
Marking a Defect as Corrected

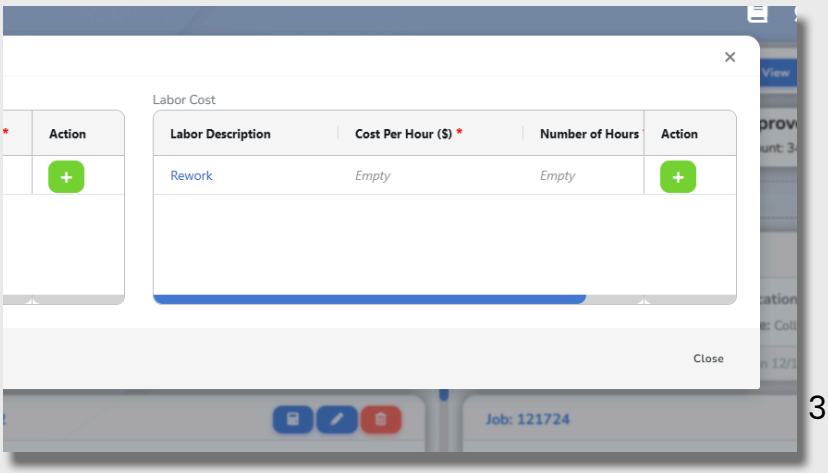
1. Locate the defect card in the "**In Process**" column.
2. Drag the card to the "**Corrected**" column.

Adding Correction Notes

1. A popup will appear, allowing you to add any additional notes about the correction.
2. Once your notes are entered, click "**Submit**".

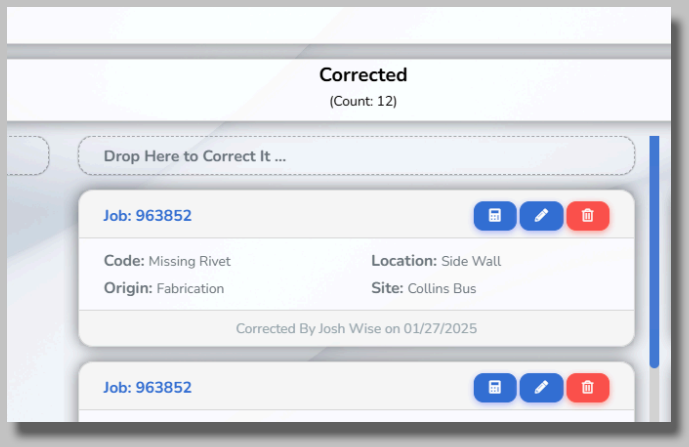






Capturing the Cost of Poor Quality (COPQ)

1. After adding notes, another popup will appear to capture the cost of correction.
2. Complete the two cost tables:
   - **Material Costs**: Add part number(s) and their respective costs.
   - **Labor Costs**: Select the labor description, cost per hour, and the number of hours. For fractional hours, use decimals (e.g., 0.25 for 15 minutes).
3. When finished, click "**Close**".

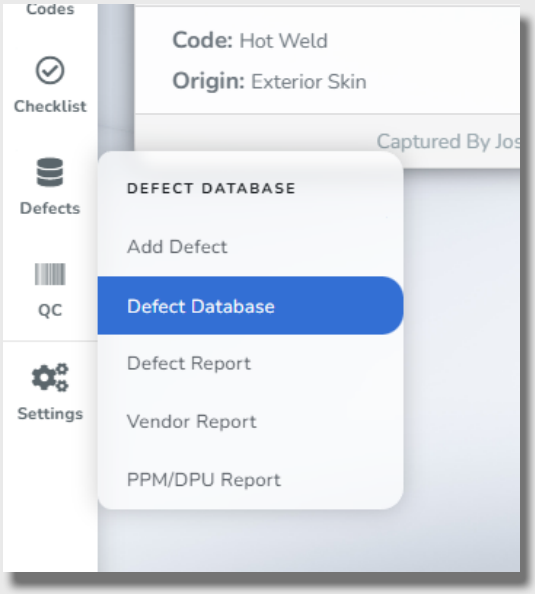


Completion

1. The defect will now appear in the "**Corrected**" column, indicating that it has been successfully corrected.

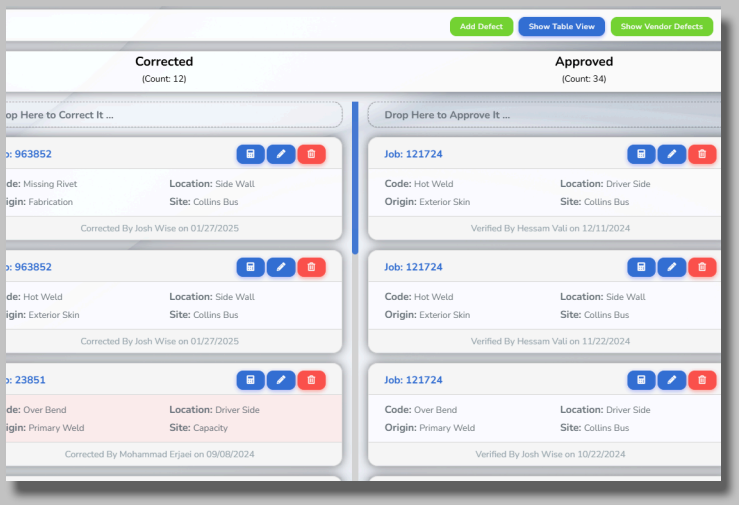
DEFECT MANAGEMENT: DEFECT VERIFICATION

Defect verification is the final step in the defect management process, ensuring that all corrective actions have resolved the issue and that the defect will not recur. The process is similar to defect correction but involves verifying defects that have already been corrected.



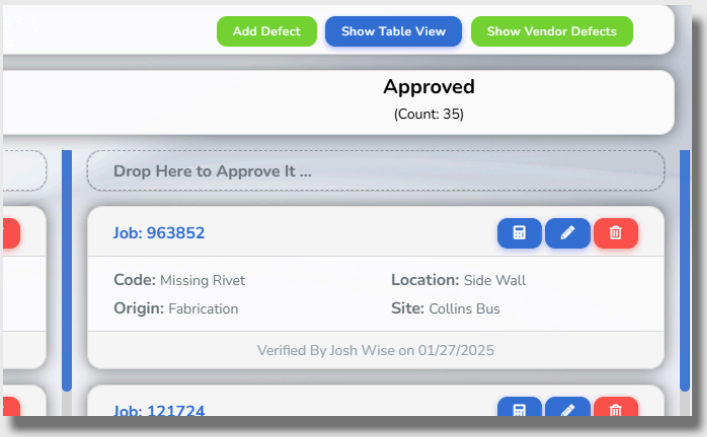
Access the Defect Database

1. Hover over the "**Defects**" option on the left-hand menu and select "**Defect Database**" from the dropdown.
2. Use the **card view**, which organizes defects into columns: **In Process**, **Corrected**, and **Approved**.



Marking a Defect as Verified

1. Locate the defect card in the "**Corrected**" column.
2. Drag the card to the "**Approved**" column.



Completion

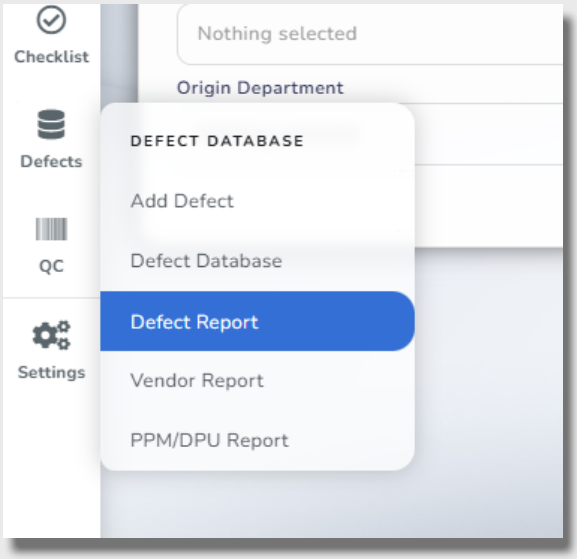
- Unlike defect correction, there is no popup to capture additional information during verification.
- Once the card is moved, the defect is officially verified, completing the defect management process.

REPORTING

Reporting is a critical component of defect management, providing valuable insights into defect trends, costs, and overall quality performance. Gigbot's reporting tools allow you to access detailed data on defects, cost of poor quality (COPQ), and performance metrics, enabling data-driven decision-making. With these reports, you can identify recurring issues, monitor improvements, and measure the effectiveness of corrective actions.

DEFECT REPORT

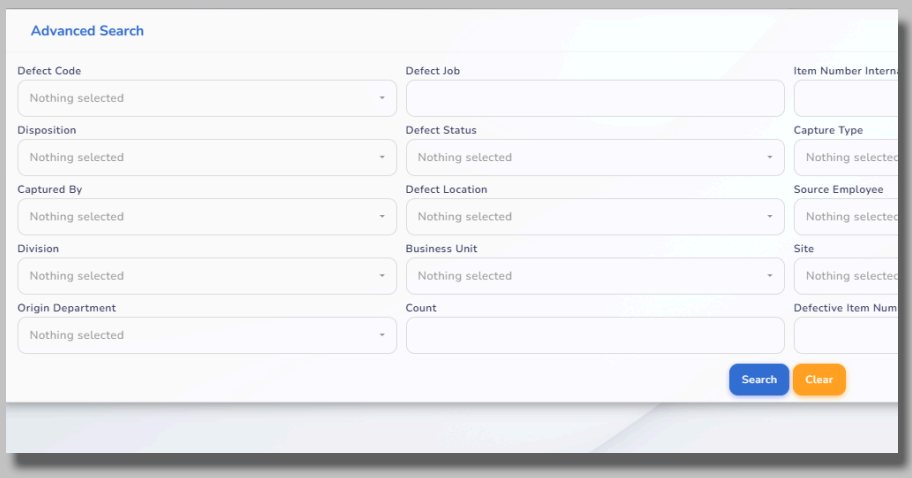
The main report that most users will be interacting with will be the Defect Report. The Defect Report provides an in-depth look at all defects captured in Gigbot, enabling you to analyze trends and identify areas for improvement. Follow these steps to access and utilize this powerful reporting tool:

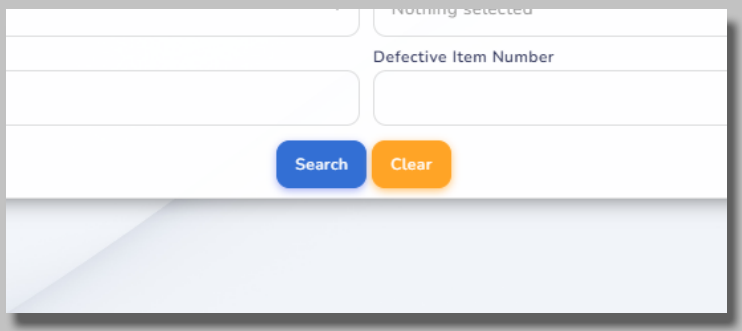


Accessing the Defect Report

1. Hover over the "**Defect**" menu on the left-hand side.
2. Click "**Defect Report**" from the dropdown menu.
3. This will take you to the **Defect Report** screen.

Using the Advanced Search

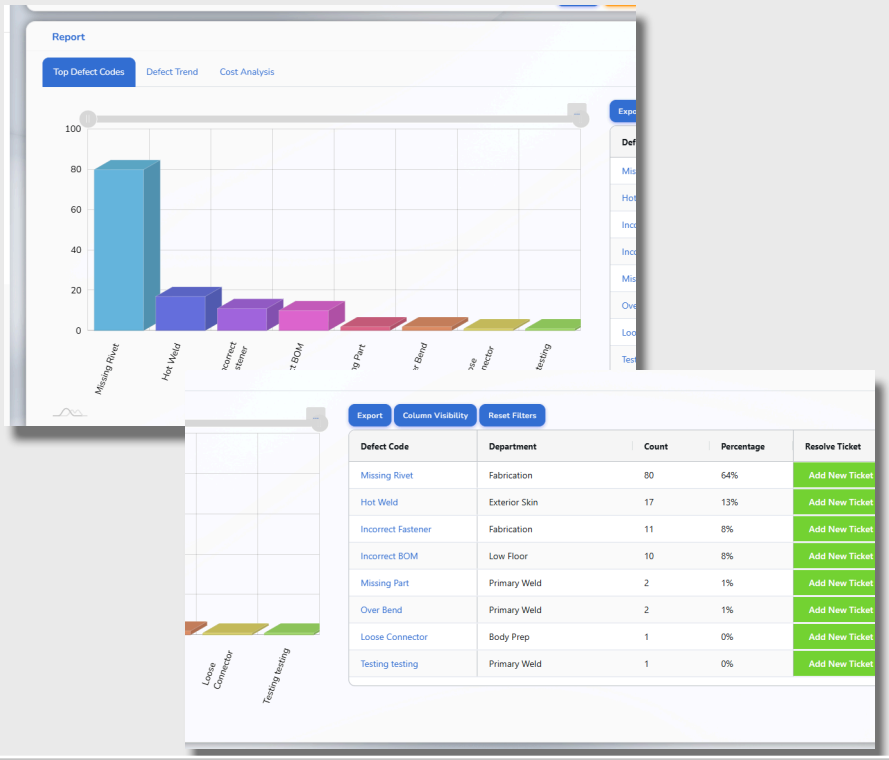




1. At the top of the screen, you'll find the "**Advanced Search**" area.
2. Enter your search criteria into the relevant fields. Any fields related to defect details can be used to refine your search.
   - For a complete explanation of these fields, refer to the **Defect Capture Method 1** section.
3. Once your criteria are set, click "Search" to view the matching data.
4. To view all defect data, leave all fields blank and click "**Search**".

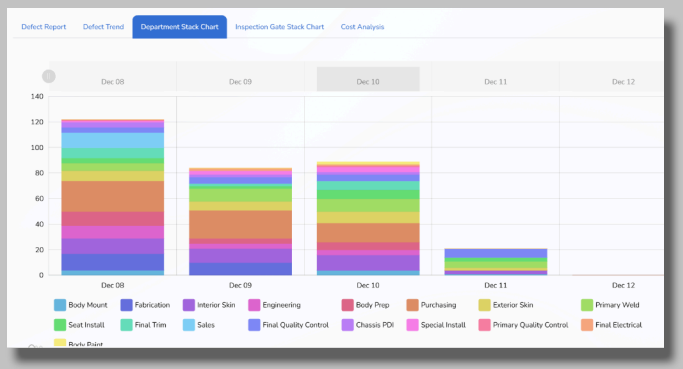
DEFECT REPORT RESULTS

The Defect Report provides insights into captured defects through three distinct tabs, helping you analyze key metrics and trends. Here's what each tab offers:



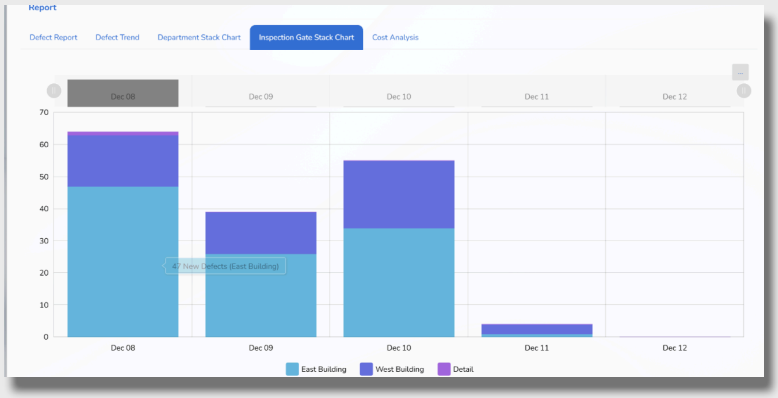
Top Defect Codes

- This tab displays a **bar graph** and a **table** showing the most frequently occurring defect codes within the search parameters.
- If you are also subscribed to **Resolve**, you'll see an option to turn top defect codes into tickets, adding them to your problem-solving workflow.



Department Stack Chart

- The **Department Stack Chart** shows defects broken down by their origine departments based on the supplied search criteria.

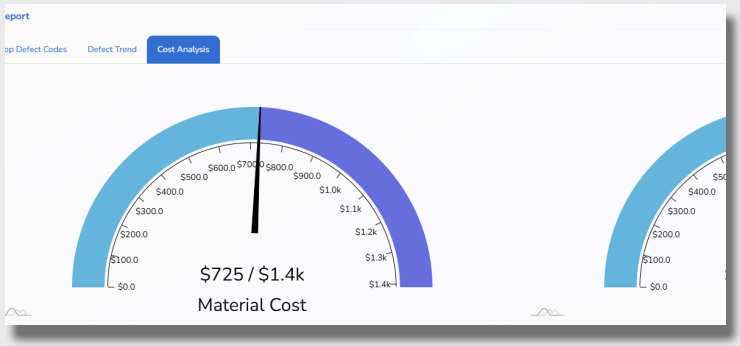


Inspection Gate Stack Chart

- The **Inspection Gate Stack Chart** shows defects broken down by the inspection gate that captured the defect.

Defect Trend

- The **Defect Trend** tab visualizes defect data over time, helping you identify patterns and trends in quality performance.



Cost Analysis

- This tab displays the Material Costs and Labor Costs for the defects that match your search criteria.
- Use this data to evaluate the financial impact of defects and prioritize improvement efforts.

CONCLUSION

This Quickstart Guide has provided an overview of Gigbot's core features to help you get started with defect tracking and management. For more detailed information, please refer to the Knowledge Base, which can be accessed in the upper right corner of the screen. If you have any questions or need further assistance, feel free to reach out at josh@optegritysolutions.com.