BOOSTER QUICKSTART GUIDE

In manufacturing, continuous improvement doesn’t happen by accident. It requires structure, visibility, accountability, and engagement. Yet many organizations struggle to consistently track the activities that actually drive improvement — training, audits, kaizen events, benchmarking trips, and leadership development efforts.

Booster is designed to centralize and streamline your OpEx activities and team development efforts. It provides a structured platform to manage training programs, book reports, benchmarking visits, audits, and both major and minor kaizen events — all in one place. With built-in tracking, reporting, and engagement tools, Booster helps ensure that improvement work is visible, measurable, and aligned with your strategic goals.

By leveraging Booster, you can increase participation in improvement initiatives, strengthen accountability, and create a culture where growth and operational excellence are part of the daily rhythm of your organization.

This Quickstart Guide will walk you through the fundamentals of using Booster, helping you turn continuous improvement efforts into sustained team momentum.

WHAT'S INSIDE	
	• KEY CONCEPTS AND TERMS • VISUAL TOUR • DASHBOARDS • LEAN ACTIVITIES • REPORTING • MERCH STORE

KEY CONCEPTS AND TERMS

Activities -The core actions tracked inside Booster. Activities represent improvement or development work completed by employees, such as trainings, book reports, audits, benchmarking trips, and kaizen events.

Audits - Structured reviews used to verify that processes, standards, or systems are being followed correctly. Audits help maintain discipline and sustain improvements over time.

Benchmarking Trips - Visits to other organizations or facilities to observe best practices and gather ideas for improvement. Booster allows teams to document insights and lessons learned from these trips.

Book Reports - A structured way for employees to share insights from professional or leadership books they've read. Book reports help promote continuous learning and knowledge sharing across the organization.

Continuous Improvement - A systematic approach to making ongoing, incremental improvements to processes, products, and team capabilities. Booster supports continuous improvement by tracking the activities that develop people and drive operational excellence.

Major Kaizen - Larger improvement initiatives that typically involve cross-functional teams and more structured planning. These events are often focused on solving significant operational challenges.

Merch Store - A company-branded store where employees can redeem points earned through Booster activities. This feature helps gamify participation and encourages team involvement in improvement work.

Minor Kaizen - Small, incremental improvements made by employees in their daily work. Minor kaizens encourage frontline engagement and help build a culture of continuous improvement.

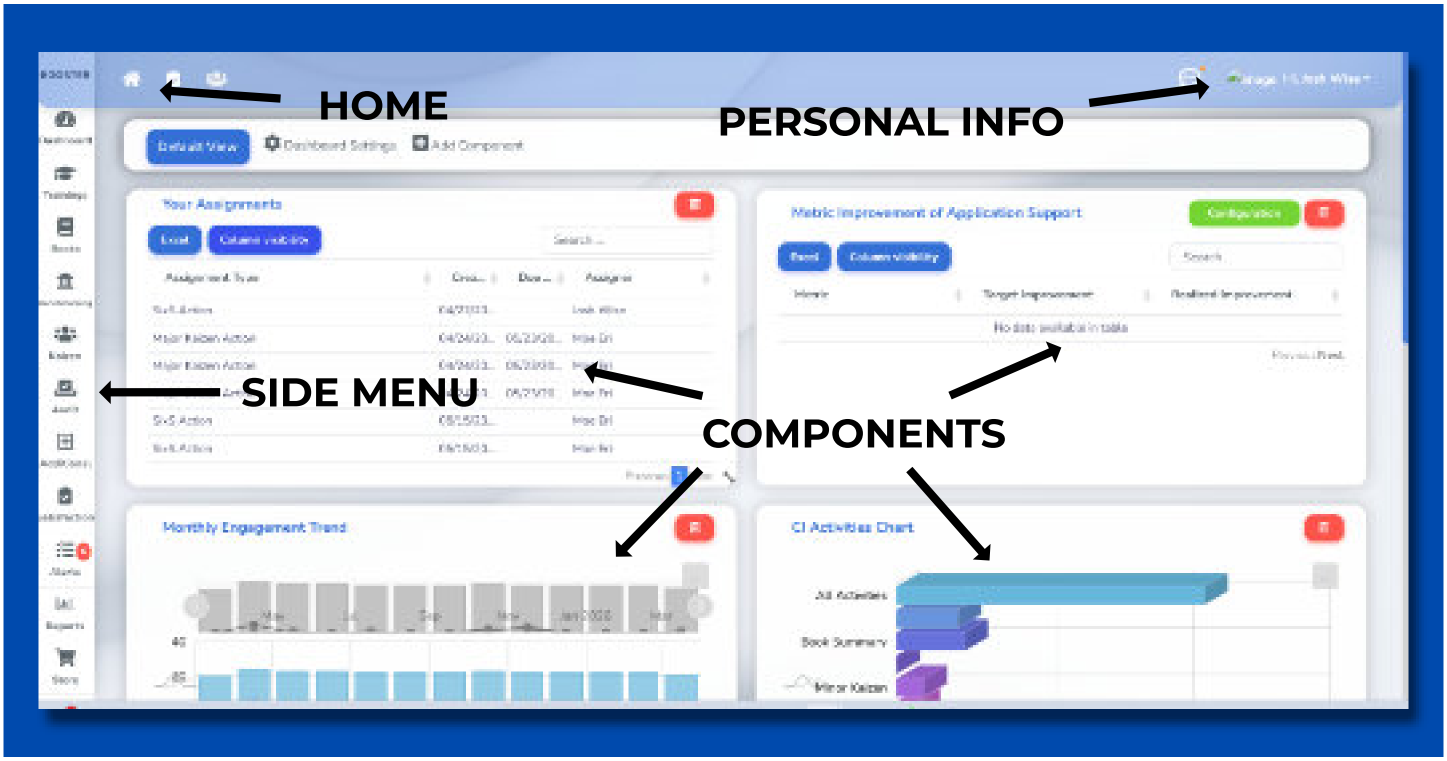
Points - A scoring system that rewards employees for completing improvement activities. Points help reinforce participation and engagement in continuous improvement efforts.

Reports - Tools within Booster that allow leaders to track participation, monitor improvement activity, and measure the impact of development efforts across teams and departments.

Training - Structured learning activities designed to develop employee skills and knowledge. Trainings can be assigned, tracked, and reported on to ensure team members are continuously developing their capabilities.

DASHBOARDS

Booster's dashboard serves as your central hub for tracking continuous improvement and team development activities. It provides an at-a-glance view of key information such as recent activity, participation levels, and improvement initiatives happening across your organization. Dashboards help leaders quickly understand how teams are engaging with training, kaizen events, audits, and other development activities, making it easier to monitor progress and maintain momentum in your continuous improvement efforts.



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.

SIDE MENU

Dashboard – Navigates the user to the main dashboards.

Training – This section allows you to add and manage training classes.

Books – This is where book summaries and book reports can be added and managed.

Benchmarking – This section is used to add and manage benchmarking trip reports.

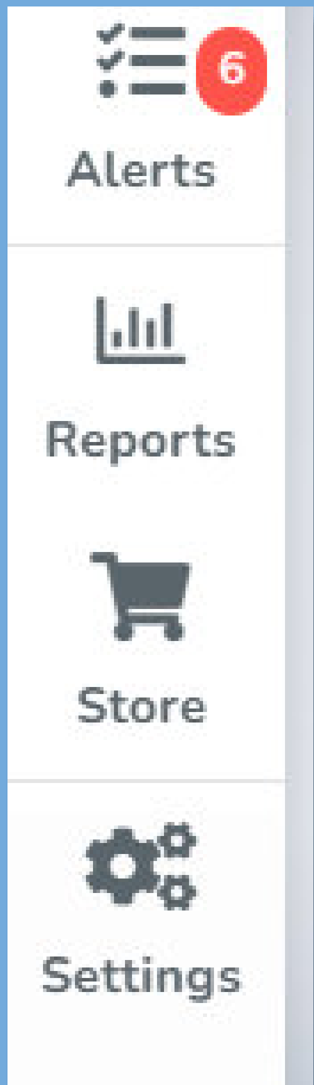
Kaizen – From here you can add and manage minor kaizen activities. This section also provides navigation to the major kaizen management screen for larger improvement initiatives.s.

Audit – This section allows users to add and manage audits.

Additional – This is where you can create and manage additional certifications.

Satisfaction – This section allows you to collect and review employee satisfaction data.

Alerts – This is where users can view system notifications and alerts related to Booster activities and updates.



Reports – The reporting section allows users to analyze participation, activity completion, and other improvement metrics across the organization.

Store – This is the merch store where employees can redeem points earned through Booster activities for company merchandise.

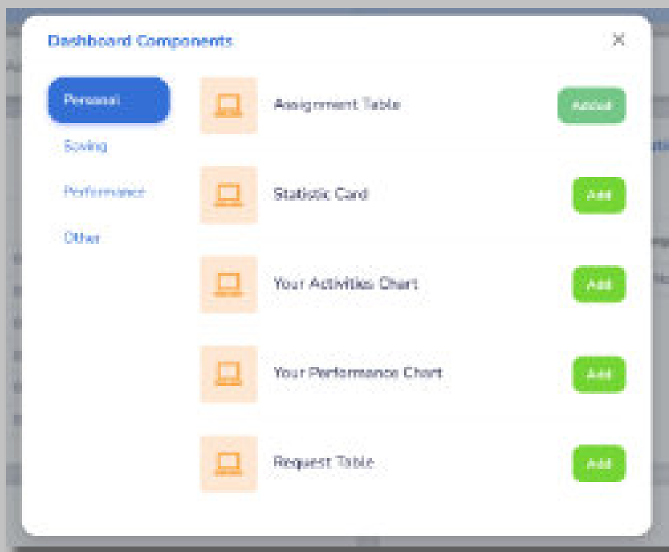
Settings – This section contains application-specific settings where administrators can configure Booster to match their organization's needs.

CREATING AND EDITING DASHBOARDS

Booster 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.

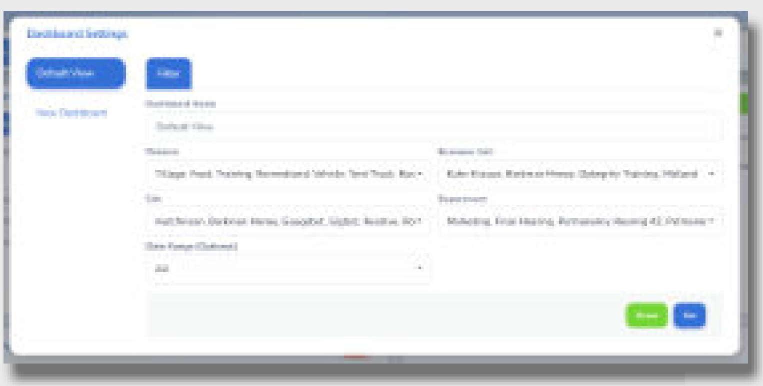
Locate Dashboard Controls

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



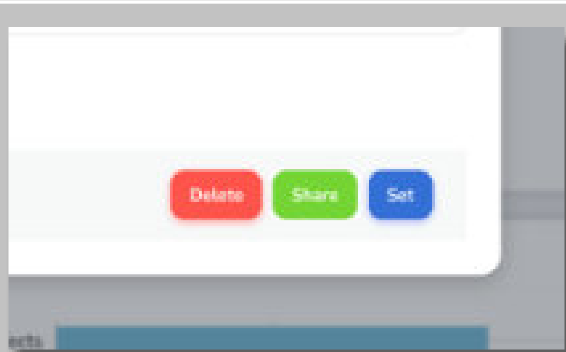
Add a Component to a Dashboard

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.



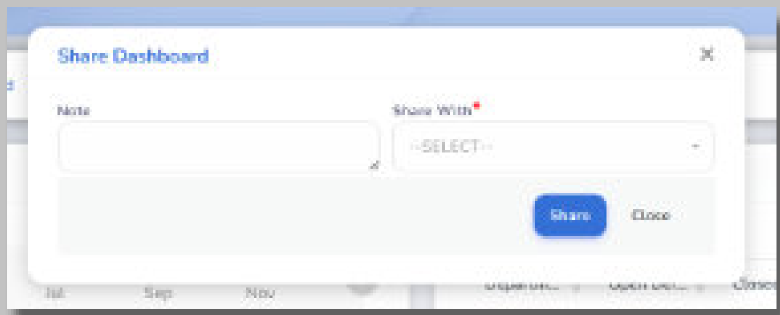
Edit an Existing Dashboard

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.

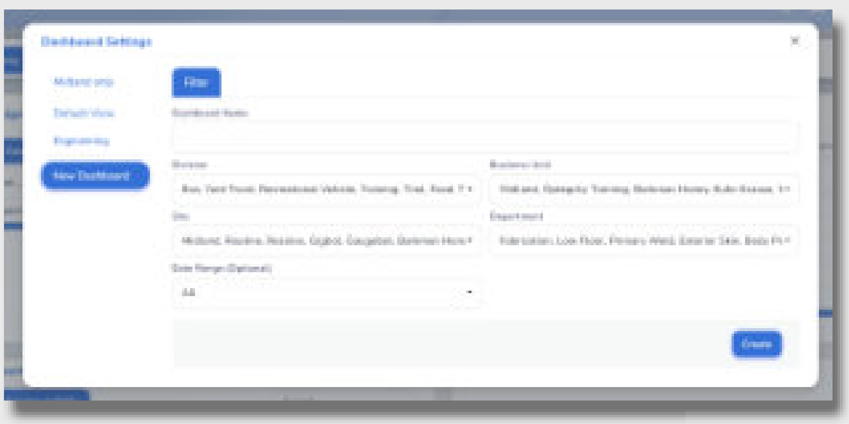


Share a Dashboard

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**".

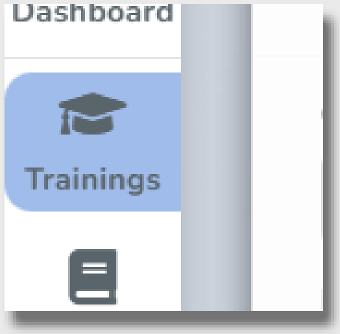


Create a New Dashboard

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

TRAININGS

Training is a key component of developing people and strengthening your organization's continuous improvement culture. Booster allows you to create and track training classes, making it easy to record who attended, who led the session, and when the training took place. By capturing this information in one centralized system, leaders can better understand how teams are developing their skills and ensure employees receive proper recognition and credit for their participation in training activities.



Accessing the Trainings Screen

To access the training management area, click **Training** from the left-hand side menu. This will open the Trainings screen.

Past training classes are displayed in a table. Each row represents a recorded training session. The table contains the following columns:

Course Name – The name of the training course that was conducted.

Instructor – The person who led the training session.

Major Kaizen – If the training was conducted as part of a major kaizen event, this column displays the name of the associated kaizen.

Site – The manufacturing site where the training took place.

Trained Employees – The employees who attended the training session.

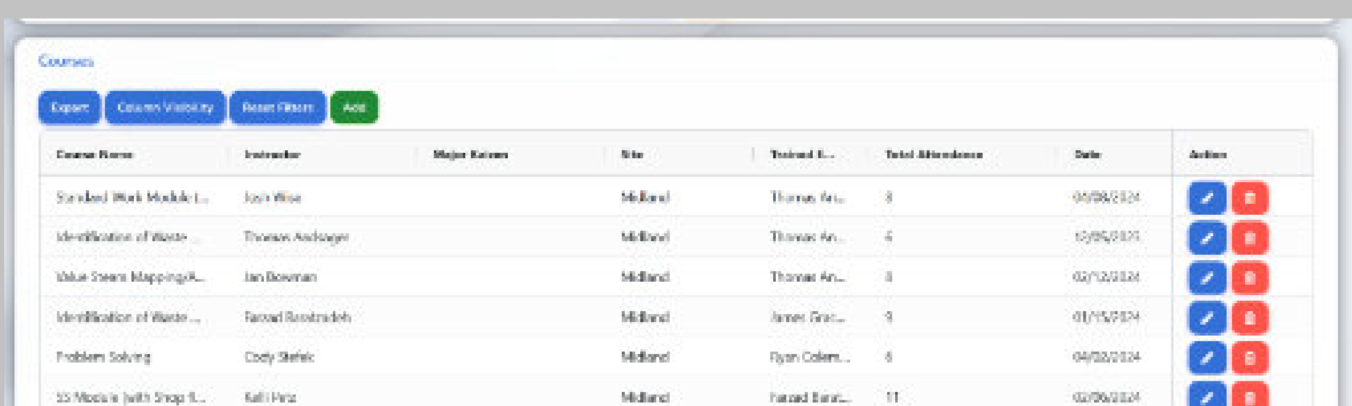
Total Attendance – The total number of attendees for the training.

Date – The date the training occurred.

Action Column – This column contains action buttons for managing the training record:

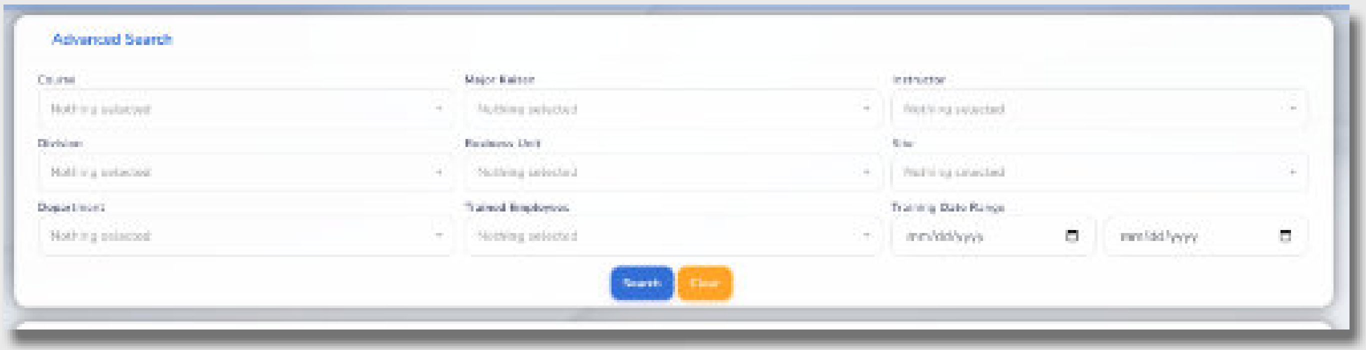
Edit (Blue Pen) – Allows you to edit the training record.

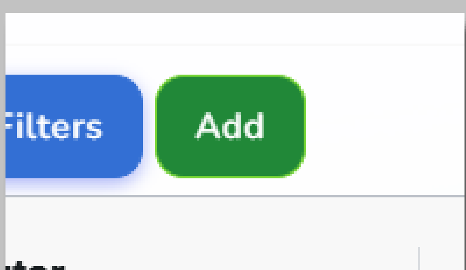
Delete – Removes the training record from the system.



Using the Advanced Search

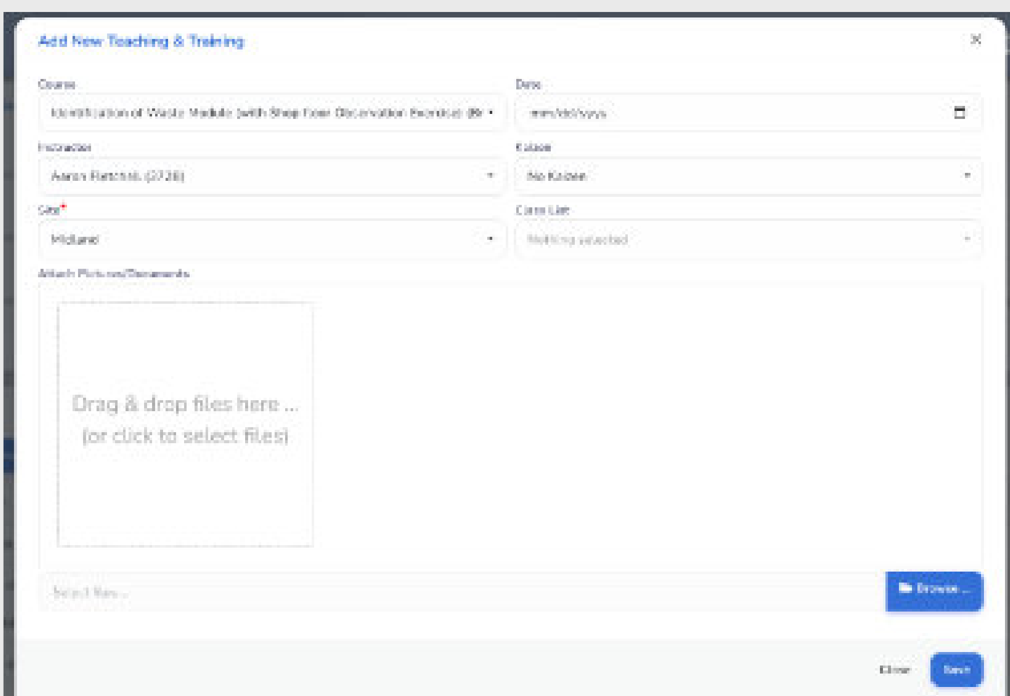
At the top of the screen is the Advanced Search section. This allows users to search the training table using any of the available criteria fields. Enter your search parameters and click Search to filter the results.





Adding a New Training

To add a new training record, click the **Add** button at the top of the screen. This will open the Add New Training popup.



Fill out the following fields to create the training record:

Course – Select the course from the dropdown menu.

Date – Enter the date the training occurred.

Instructor – Select the instructor from the dropdown menu.

Kaizen – If the training is part of a major kaizen event, select the kaizen from this dropdown.

Site – Select the site where the training took place.

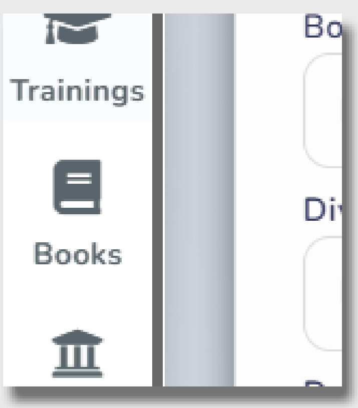
Class List – Select the employees who attended the training from the dropdown list.

Attachments – Upload any files or images related to the training session.

Once all required fields are completed, click Save to add the training to the system.

BOOKS

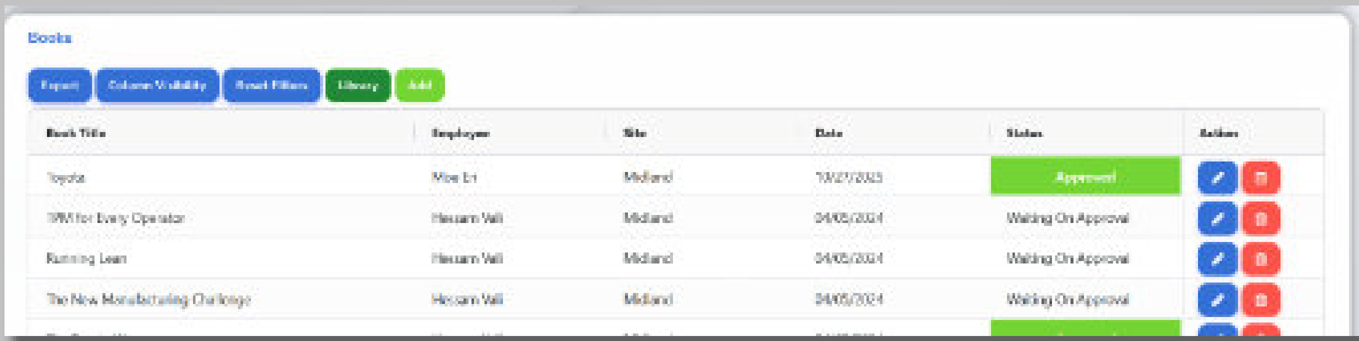
The **Books** section allows employees to submit book reports based on professional or leadership books they have read. This feature helps encourage continuous learning and knowledge sharing across the organization. By capturing key insights and takeaways from these books, teams can spread new ideas, leadership concepts, and improvement strategies that support ongoing personal and organizational development.



Accessing the Books Screen

To access the **Books** section, click Books from the left-hand side menu. This will take you to the **Book Summary** screen.

Submitted book reports are displayed in a table, with each row representing a report that has been entered into the system. The table contains the following columns:



Book Title – The title of the book the report is based on.

Employee – The employee who submitted the book report.

Site – The site associated with the employee who submitted the report.

Date – The date the book report was submitted.

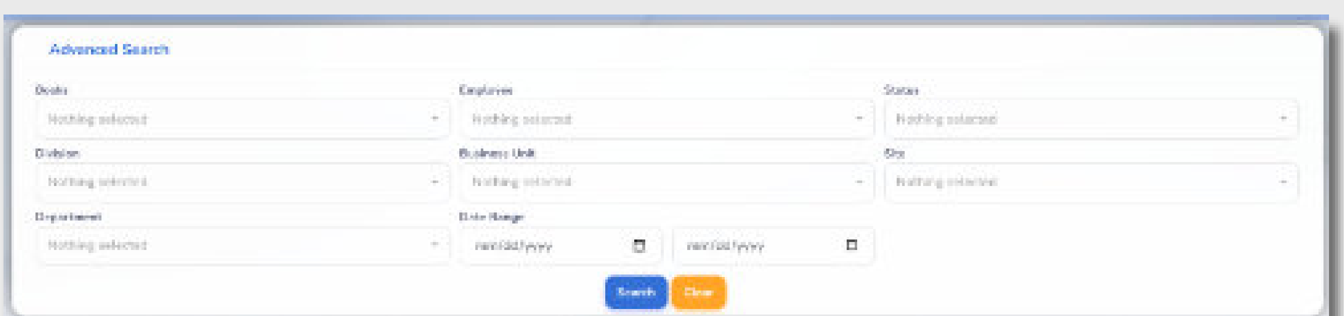
Status – Indicates the approval status of the book report. Newly submitted reports are marked “Waiting on Approval.” Managers can review the report and either approve or reject it.

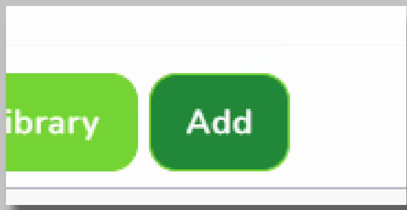
Action Column – This column contains two buttons for managing the record:

- **Edit** – Allows you to modify the book report.
- **Delete** – Removes the book report from the system.

Using the Advanced Search

At the top of the screen is the Advanced Search section. This allows you to search the book reports table by filtering results using any of the available criteria fields





Adding a New Training

To add a new training record, click the **Add** button at the top of the screen. This will open the Add New Training popup.

Complete the following fields to submit the report:

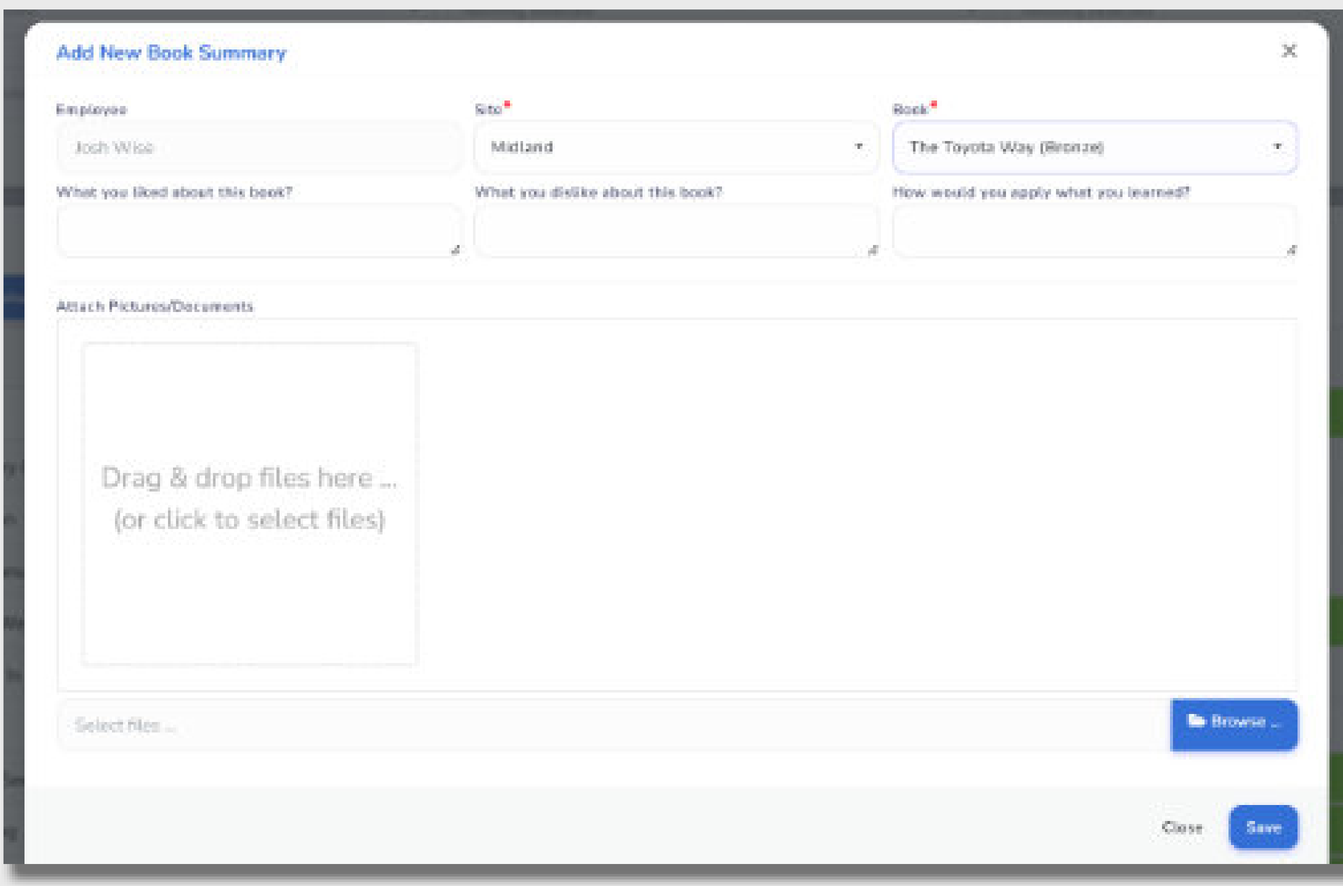
Employee – This field defaults to the currently logged-in user.

Site – Select the site associated with the employee submitting the report.

Book – Select the book from the dropdown menu.

What did you like about this book? – Provide a summary of the key ideas or concepts you found valuable.

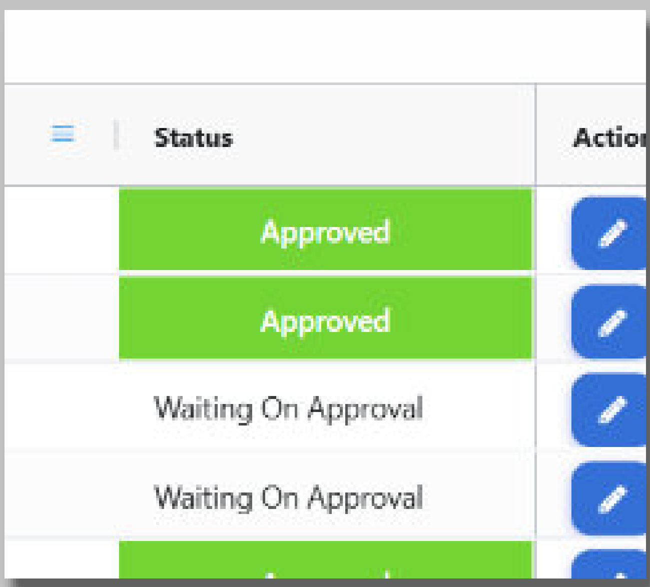
What did you dislike about this book? – Describe any aspects of the book that were unclear, unhelpful, or that you disagreed with.



How would you apply what you learned? – Explain how the ideas from the book could be applied to your work, team, or organization.

Attach Pictures/Documents – Upload any supporting files or images related to the book report if needed.

Once all fields are completed, click **Save** to submit the book report for approval.

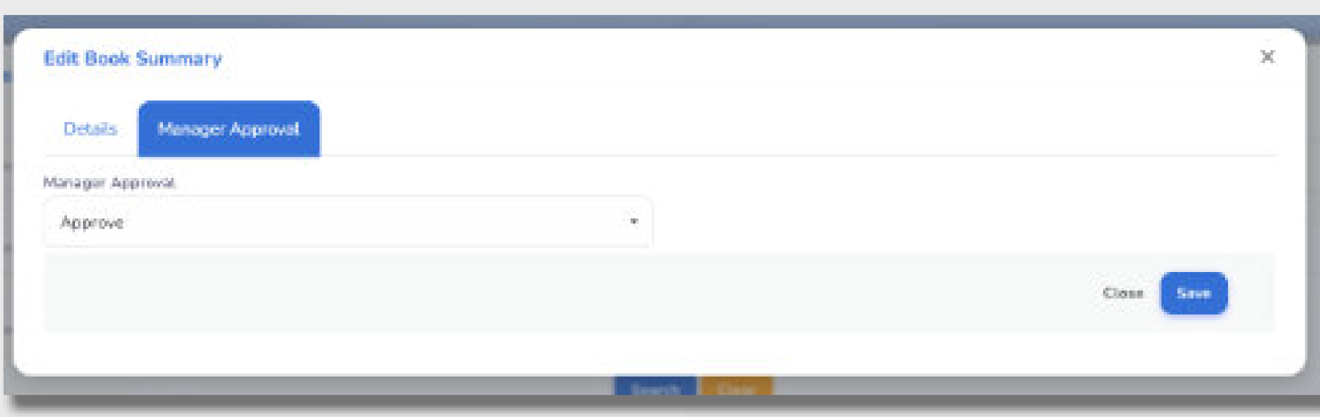


Approving a Book Report

If you are a manager responsible for approving book reports, locate the report in the table on the Book Summary screen. You can use the Advanced Search (described above) to help find a specific report if needed.

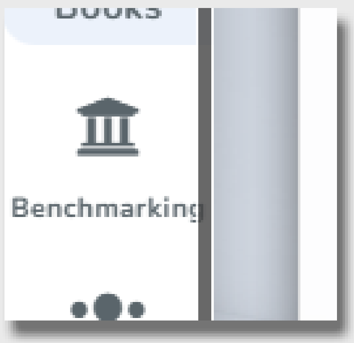
In the Status column, book reports that have been submitted will display "Waiting on Approval." Click this status to open the Manager Approval popup.

From the dropdown menu, select either **Approve** or **Reject**. Once your selection is



BENCHMARKING

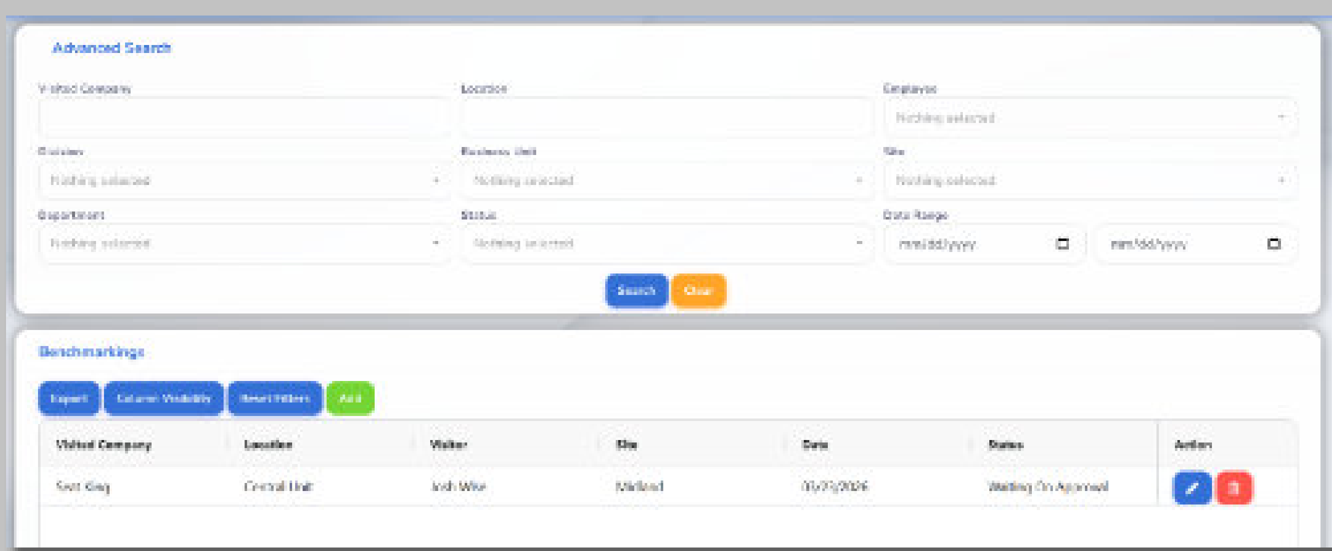
Benchmarking trips provide valuable opportunities for teams to observe best practices, learn from other organizations, and bring new ideas back to their own operations. The Benchmarking section in Booster allows employees to document these visits by capturing key observations, lessons learned, and potential improvement opportunities. By recording benchmarking trip reports in Booster, organizations can ensure that insights gained during these visits are shared, preserved, and used to drive continuous improvement across the business.



Accessing the Benchmarking Screen

To access the Benchmarking section, select **Benchmarking** from the left-hand side menu. This will open the **Benchmarking** screen.

Submitted benchmarking trip reports are displayed in a list, which each row



representing a recorded visit. The table contains the following columns:

Visited Company - The compnay or facility that was visiited during the benchmarking trip.

Location - The location of the visited company.

Visitor - The employee who conducted the benchmarking visit

Site - The visitor's home site.

Date - The date the benchmarking trip took place.

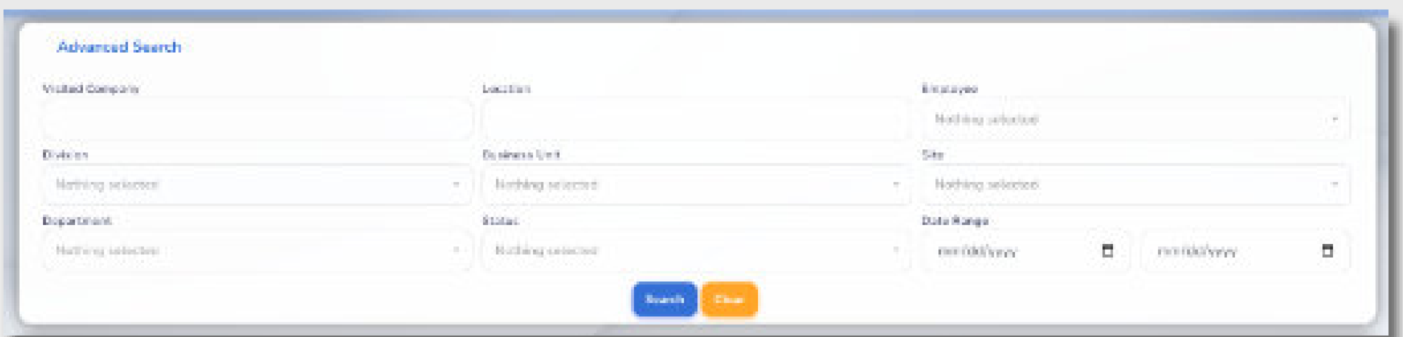
Status - indicates the appoval status of the benchmarking report. Similar to book reports, submissions will show **"Waiting on Approval**" until a manager reviews and pproves or rejects them.

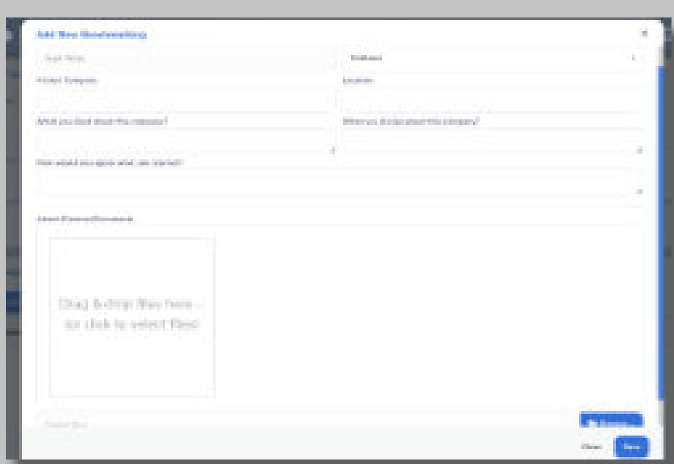
Action Column - This column contains the available actions for each record:

- **Edit** - Allows you to modify the benchmarking report.

Using the Advanced Search

At the top of the screen is the **Advanced Search** section. This allows you to filter the benchmarking reports by any of the available criteria listed aboce. Enter your search parameters and click **Search** to view matching results.





Adding a Benchmarking Trip

To add a new benchmarking trip, click the **Add** button at the top of the screen. This will open the **Add New Benchmarking Trip** popup.

Complete the following fields to record the visit:

Employee – Select the employee who conducted the benchmarking trip.

Site – Select the employee's home site.

Visited Company – Enter the name of the company or facility that was visited.

Location – Enter the location of the visited company.

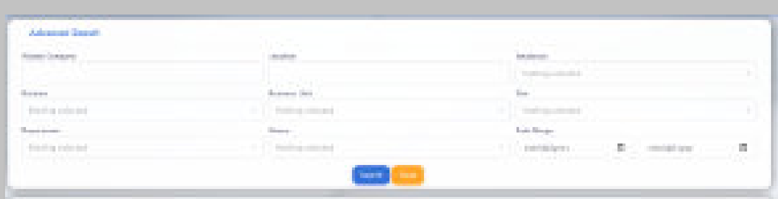
What did you like about this company? – Describe the practices, processes, or ideas that stood out as effective.

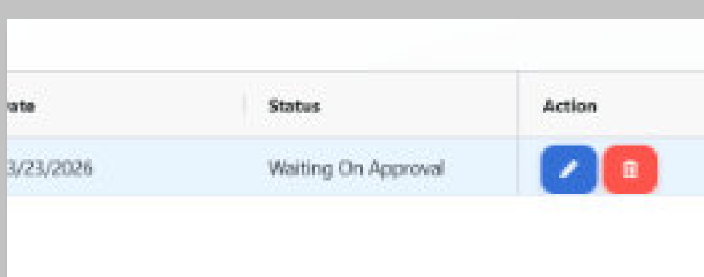
What did you dislike about this company? – Note any observations that were less effective or areas of concern.

How would you apply what you learned? – Explain how the insights from the visit can be applied within your own organization.

Attach Pictures/Documents – Upload any photos or supporting documents from the visit.

Once all fields are completed, click **Save** to add the benchmarking trip to the system.

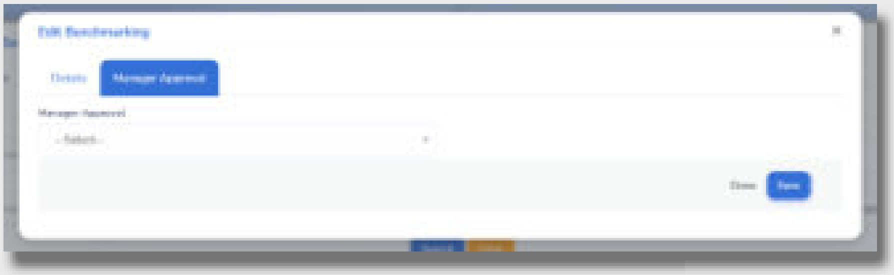




Approving a Benchmarking Trip

If you are a manager responsible for approving benchmarking trips, locate the trip in the list on the Benchmarking screen. You can use the Advanced Search function (described above) to find a specific record if needed.

In the Status column, trips awaiting review will display "**Waiting on Approval**" Click this status to open the Trip Details



Navigate to the Manager Approval tab. From the dropdown menu, select either Approve or Reject.

Click **Save** to record your decision.

KAIZENS

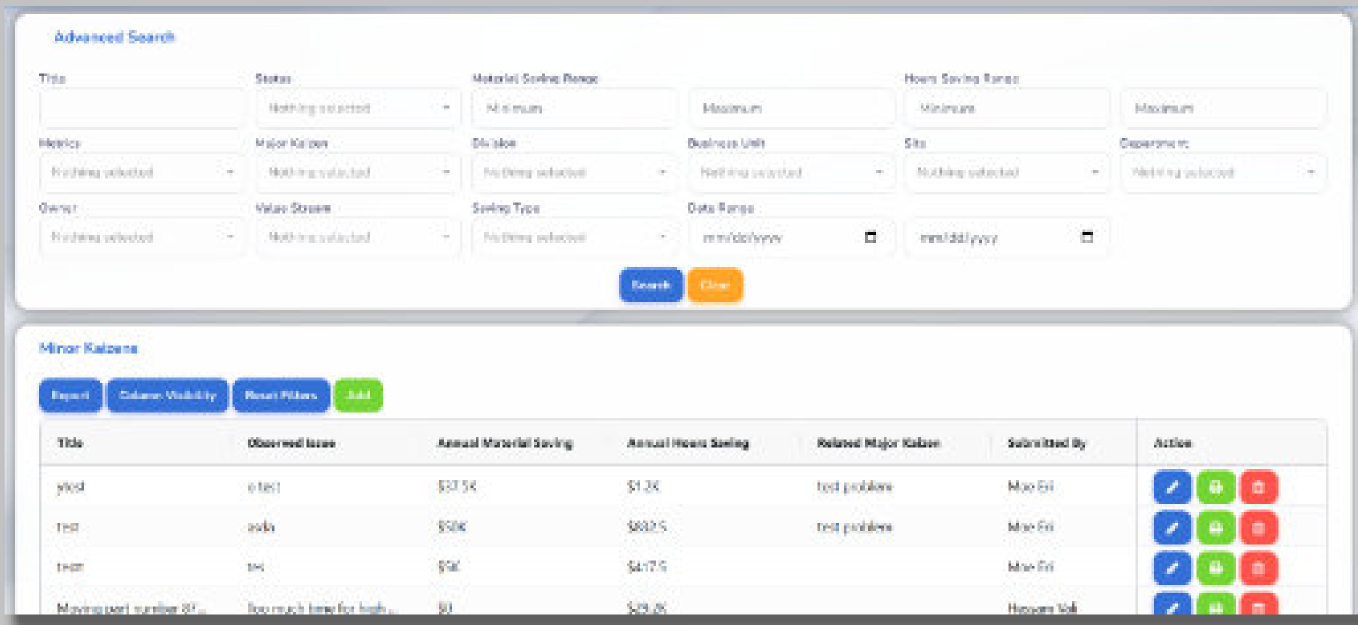
Kaizen is at the core of any continuous improvement culture, focusing on making meaningful improvements to processes, operations, and overall performance. Booster organizes kaizen activities into two types: Major Kaizen and Minor Kaizen. Major kaizen events are larger, structured team initiatives that typically span multiple days or weeks and are focused on a specific goal or area of improvement. Minor kaizens, on the other hand, are smaller in scope and are often driven by individuals or small groups making incremental improvements in their daily work. Booster provides the tools to track, manage, and recognize both types of kaizen efforts. The following sections will walk through how to capture and manage each within the system.

MINOR KAIZENS

Accessing the Minor Kaizen Screen

To access the Minor Kaizen section, hover over the **Kaizen** icon in the left-hand side menu and select **Minor Kaizen** from the dropdown menu. This will open the **Minor Kaizen** screen.

All submitted minor kaizens are displayed in a list/table, with each row representing an individual improvement. The table contains the following columns:



Title – The title of the minor kaizen.

Observed Issue – A description of the problem or opportunity that prompted the improvement.

Annual Material Saving – The estimated yearly material cost savings resulting from the improvement.

Annual Hours Saving – The estimated yearly labor time savings.

Related Major Kaizen – If the minor kaizen is connected to a larger initiative, the associated major kaizen will be listed here.

Submitted By – The employee who submitted the minor kaizen.

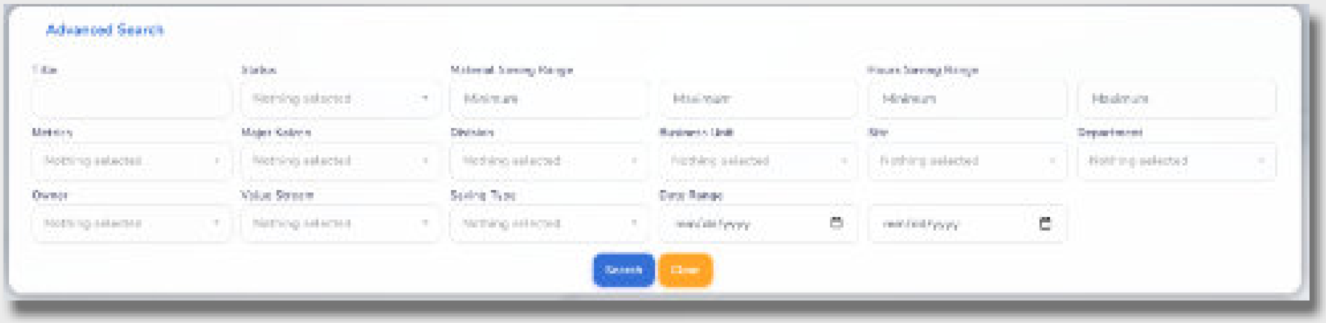
Site – The site where the improvement was implemented.

Date – The date the minor kaizen was submitted.

Status – Indicates the current status of the kaizen (e.g., pending approval, approved, etc.).

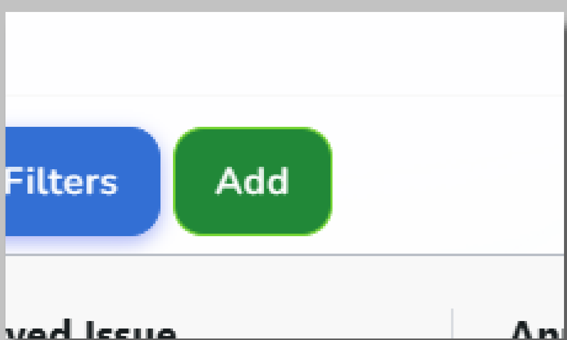
Action Column – This column contains the available actions for each record:

- **Edit** – Allows you to modify the minor kaizen.
- **Print** – Generates a one-page report of the minor kaizen.



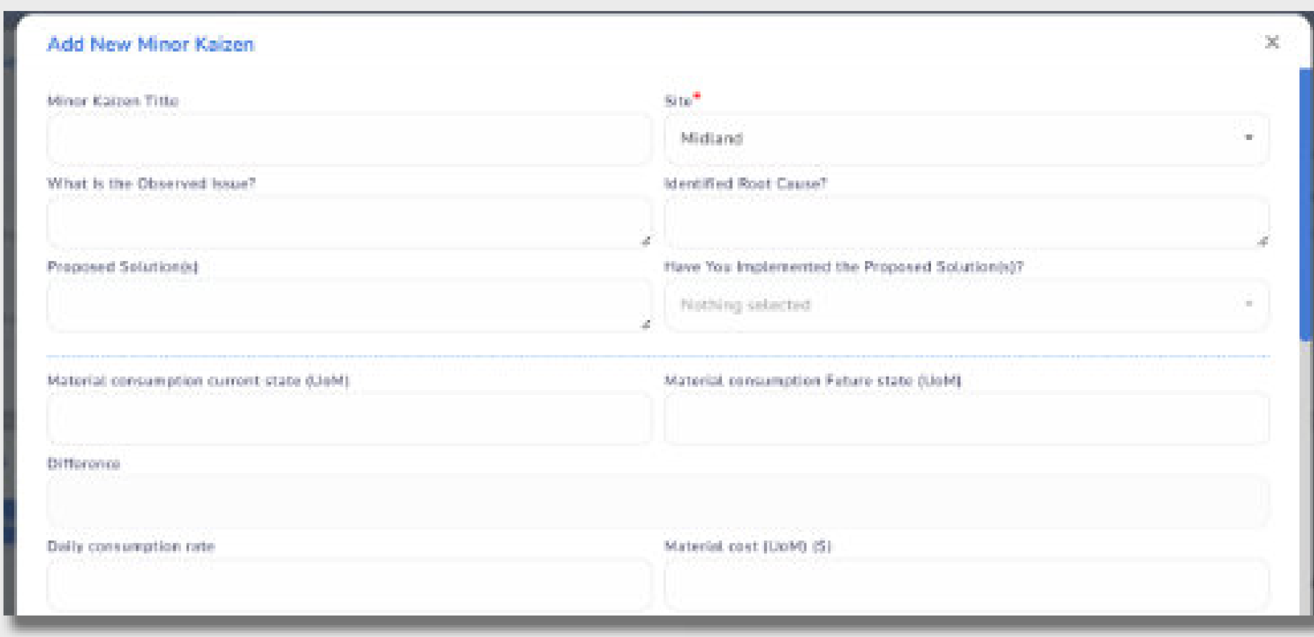
Using the Advanced Search

At the top of the screen is the **Advanced Search** section. This allows you to filter and search the minor kaizen list using any of the available criteria fields. Enter your search parameters and click **Search** to view matching results.



Adding a Minor Kaizen

To add a new minor kaizen, click the **Add** button at the top of the list. This will open the **Add New Minor Kaizen** popup.



Complete the following fields to submit the kaizen:

Minor Kaizen Title – Enter a clear title for the improvement.

Site – Select the site where the kaizen is taking place.

What is the Observed Issue? – Describe the problem or opportunity being addressed.

Identified Root Cause? – Document the root cause of the issue.

Proposed Solutions? – Outline the improvement ideas or actions being taken.

Have You Implemented the Proposed Solution(s)? – Select Yes or No from the dropdown

Material Savings

Material Consumption Current State (UoM) – Enter current material usage.

Material Consumption Future State (UoM) – Enter expected material usage after improvement.

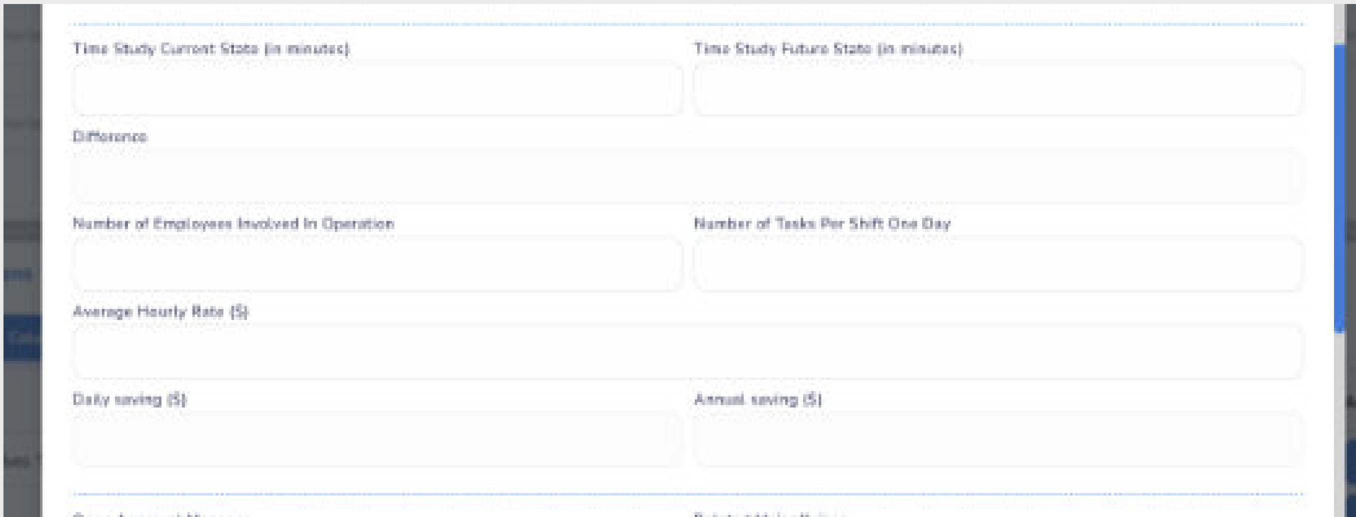
Difference – This field is automatically calculated.

Daily Consumption Rate – Enter how often the material is used.

Material Cost (UoM) ($) – Enter cost per unit of material.

Daily Saving ($) – Automatically calculated.

Annual Saving ($) – Automatically calculated.



Labor Savings

Time Study Current State (minutes) – Enter current time required.

Time Study Future State (minutes) – Enter expected time after improvement.

Difference – Automatically calculated.

Number of Employees Involved in Operation – Enter number of employees.

Number of Tasks per Shift (1 day) – Enter frequency of the task.

Average Hourly Rate ($) – Enter labor rate.

Daily Saving ($) – Automatically calculated.

Annual Saving ($) – Automatically calculated.

Additional Information

Opex Approval Manager – Select the manager responsible for approval.

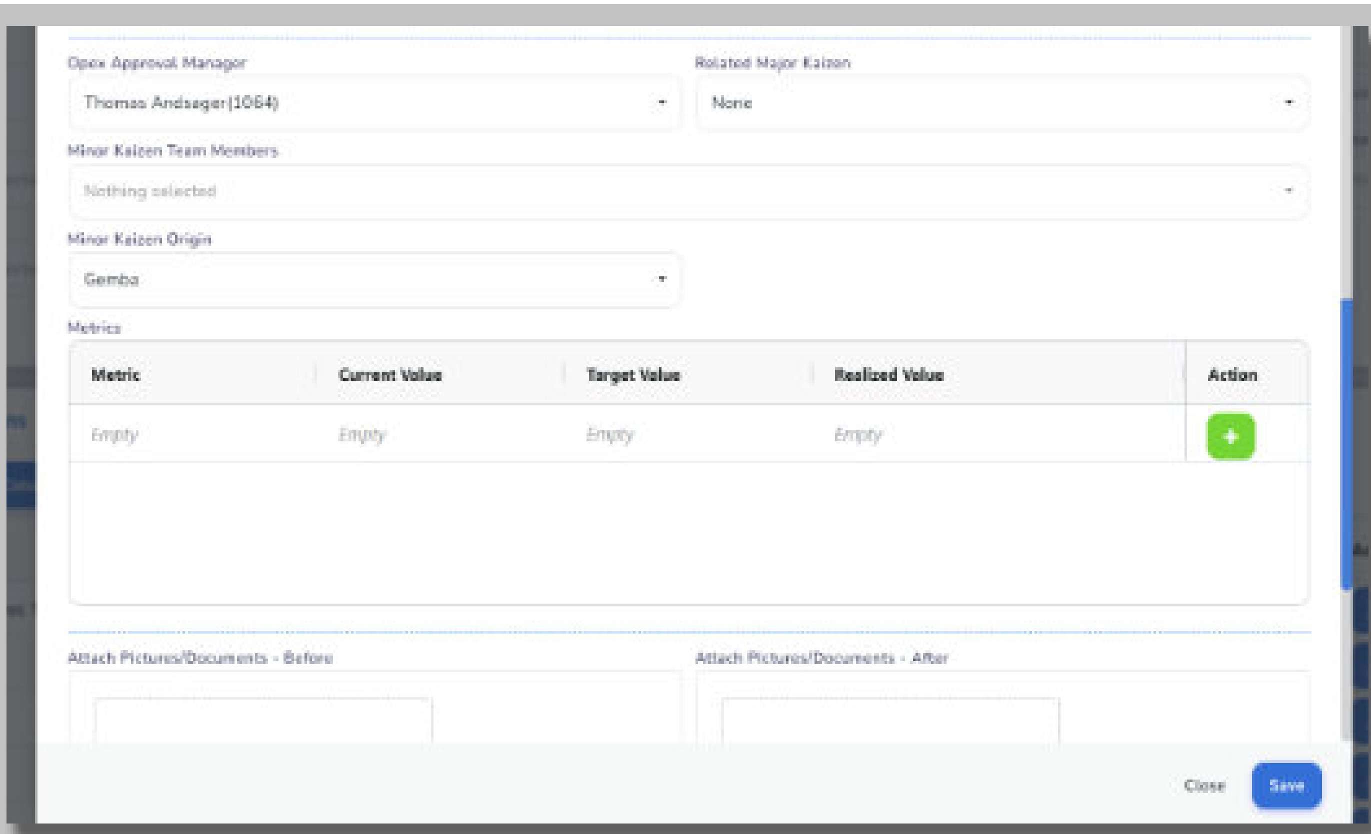
Related Major Kaizen – If applicable, select the associated major kaizen.

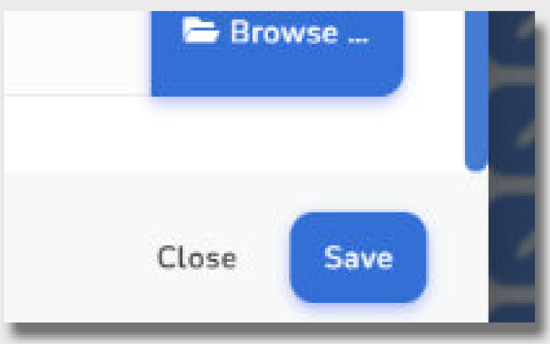
Minor Kaizen Team Members – Select additional team members involved.

Minor Kaizen Origin – Select where the idea originated from.

Metrics – Add any additional metrics impacted by this kaizen.

Attachments (Before/After) – Upload supporting documents or images.

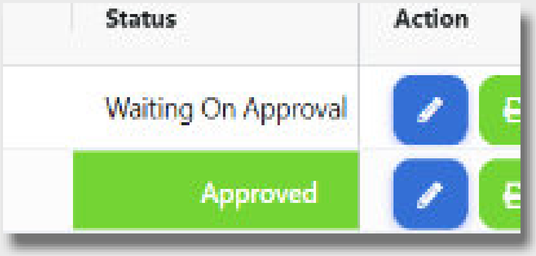




Once all required fields are completed, click **Save** to submit the minor kaizen for review.

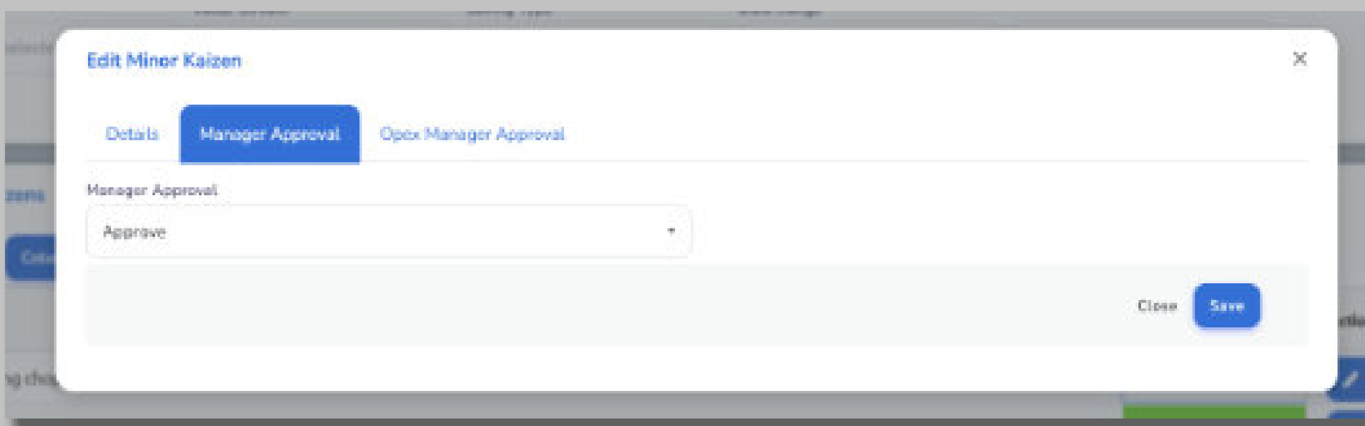
Approving a Minor Kaizen

If you've been assigned a minor kaizen to approve, you can locate it in the **Minor Kaizen** list. If needed, use the **Advanced Search** at the top of the screen to quickly

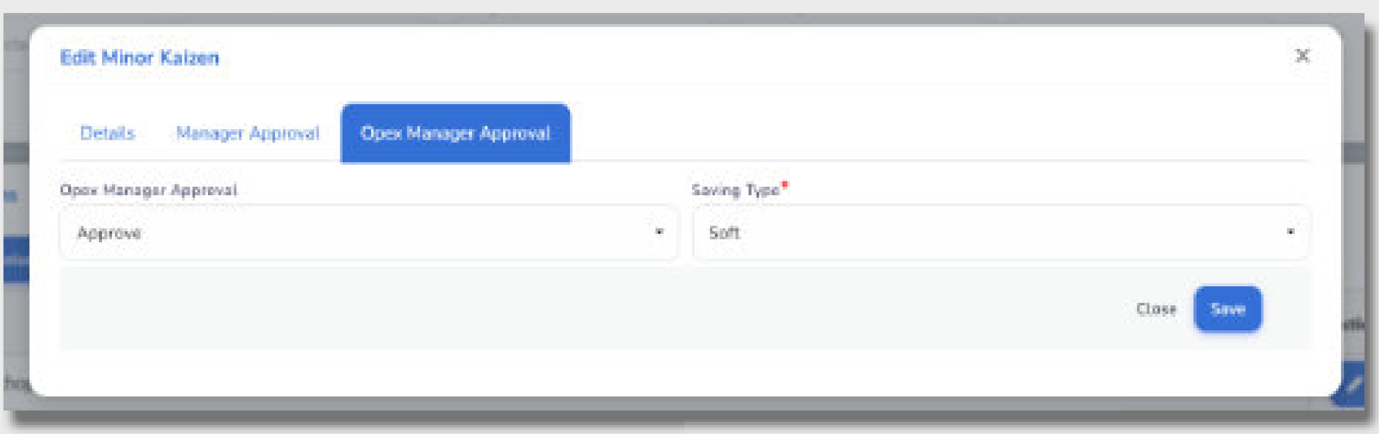


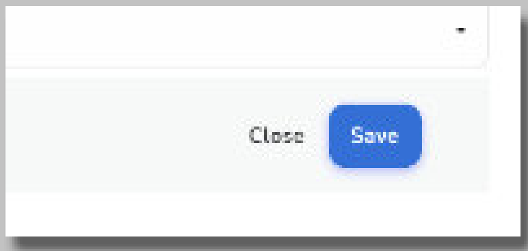
To approve or reject a minor kaizen, go to the **Status** column and click on "**Waiting on Approval**". This will open the Minor Kaizen Approval popup.To approve or reject a minor kaizen, go to the Status column and click on "Waiting on Approval." This will open the **Minor Kaizen**

If you are a manager, ensure you are on the **Manager Approval** tab. From the approval dropdown, select either **Approve** or **Reject**. If you choose to reject the kaizen, you can enter a **rejection note** to provide feedback to the submitter.



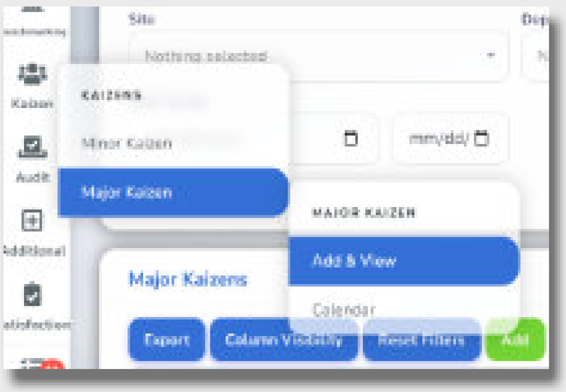
If you are the **OpEx Manager**, you will also need to review the kaizen. Navigate to the **OpEx Approval** tab, where you can similarly select **Approve** or **Reject**. The approval process works the same way as the manager approval.





Once you've made your selection, click **Save** to finalize your decision.

MAJOR KAIZENS



Accessing the Major Kaizen List

To add or view a major kaizen, hover over the **Kaizen** icon in the left-hand side menu. From the dropdown, hover over **Major Kaizen**, then select **Add & View**. This will open the **Major Kaizen** list.

All major kaizens are displayed in a list/table format, with each row representing a specific kaizen event. The table includes the following columns:

Title – The name of the major kaizen event.

Start Date – The date the kaizen event begins.

End Date – The date the kaizen event is scheduled to end.

Champion – The individual leading or responsible for the kaizen.

Site – The location where the kaizen is being conducted.

Average Status – Displays the overall progress status across the kaizen.

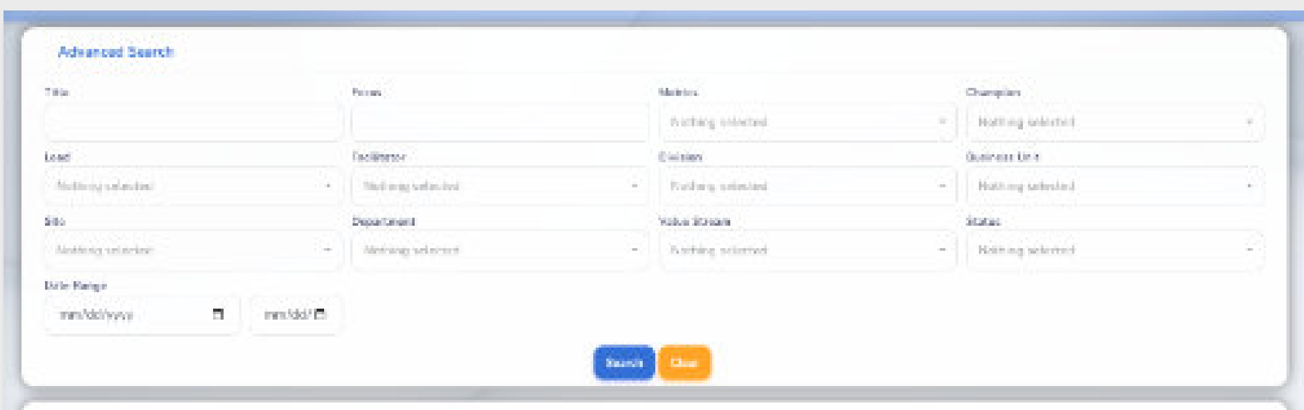
Status – Indicates the current state of the kaizen (e.g., active, completed, etc.).

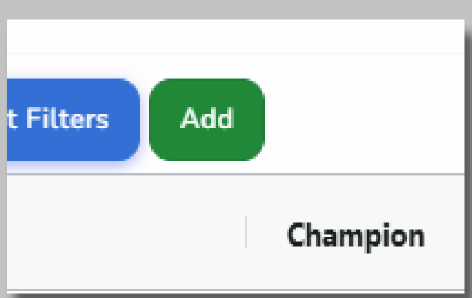
Action Column – Contains buttons to interact with the kaizen:

- **Edit** – Modify the kaizen details
- **Print** – Generate a report
- **Delete** – Remove the kaizen from the system

Using the Advanced Search

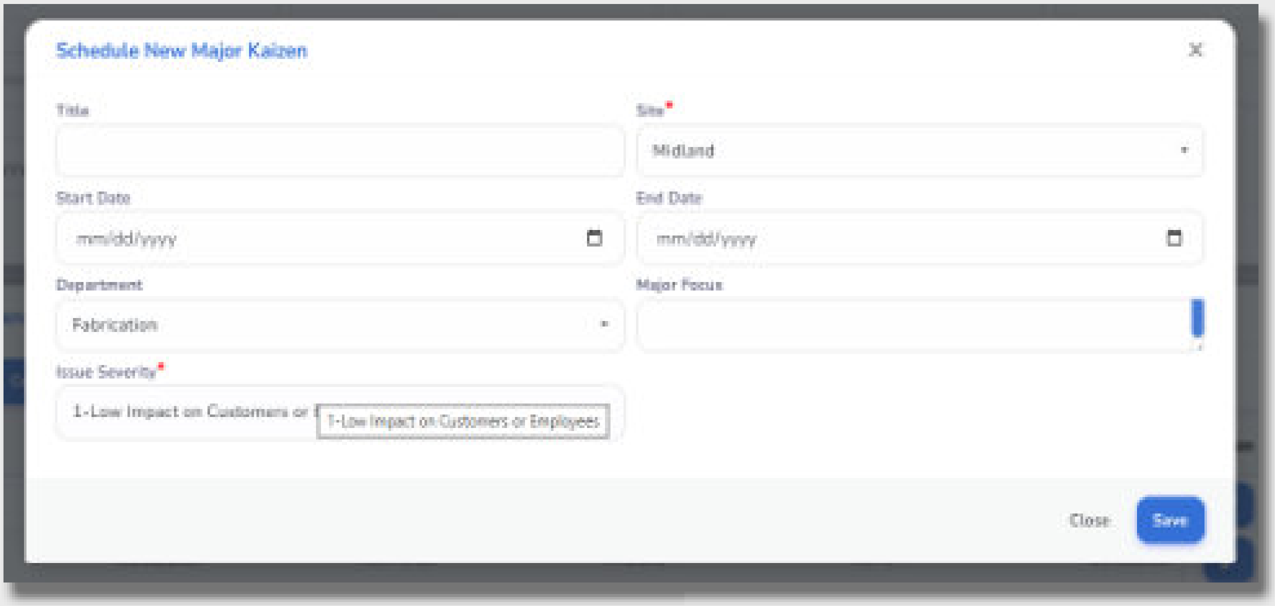
At the top of the screen is the **Advanced Search** section. This allows you to filter and search the major kaizen list using any of the available columns or criteria.





Creating a New Major Kaizen

To create a new major kaizen, click the **Add** button at the top of the table. This will open the Schedule **New Major Kaizen** popup.



Fill out the following fields to schedule the kaizen:

Title – Enter a name for the kaizen event.

Site – Select the site where the kaizen will take place.

Start Date – Choose the start date of the event.

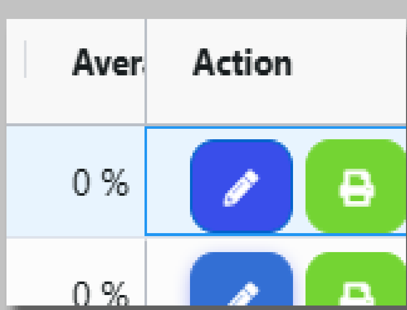
End Date – Choose the end date of the event.

Department – Select the department involved.

Major Focus – Define the primary focus area of the kaizen.

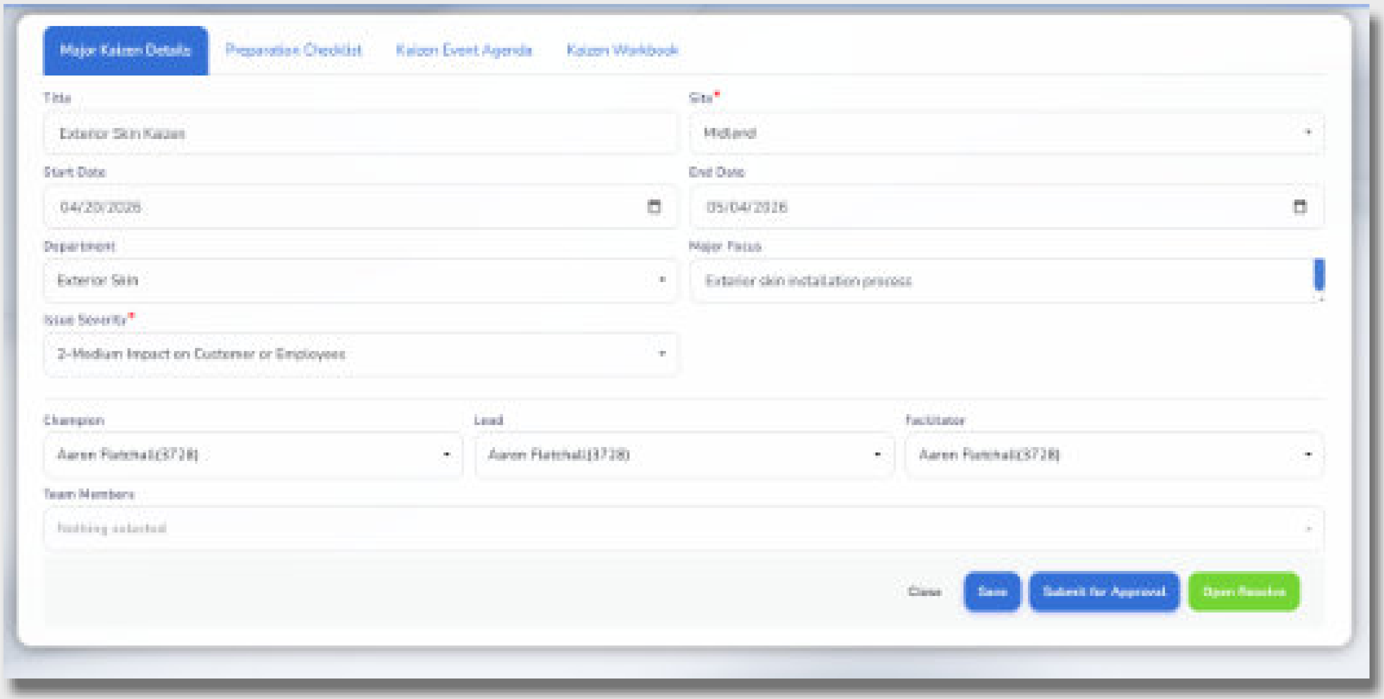
Issue Severity – Indicate the level of importance or urgency.

Once all required fields are completed, click **Save** to schedule the kaizen event.



Opening and Managing a Major Kaizen

To open a major kaizen, click the **Edit** button in that kaizen's row. This will open the selected major kaizen in a new



Major Kaizen Details Tab

The major kaizen is organized into four tabs. The first tab is Major Kaizen Details..

This tab contains the primary information entered when the kaizen was originally scheduled (refer to the Creating a New Major Kaizen section for more details). It also includes additional information and allows you to define the kaizen team.

Within this tab, you can assign the following roles:

Champion – The individual responsible for overall ownership and success of the kaizen.

Lead – The person driving day-to-day activities and progress.

Facilitator – The individual guiding the kaizen process and ensuring structure.

Team Members – Use this dropdown to select additional participants. Multiple employees can be selected, allowing teams to be as large as needed.

Preparation Checklist Tab

The next tab in the major kaizen is the **Preparation Checklist**.

This tab contains a list of tasks that must be completed before the kaizen event can begin. It helps ensure that all necessary planning and setup activities are properly tracked and completed.

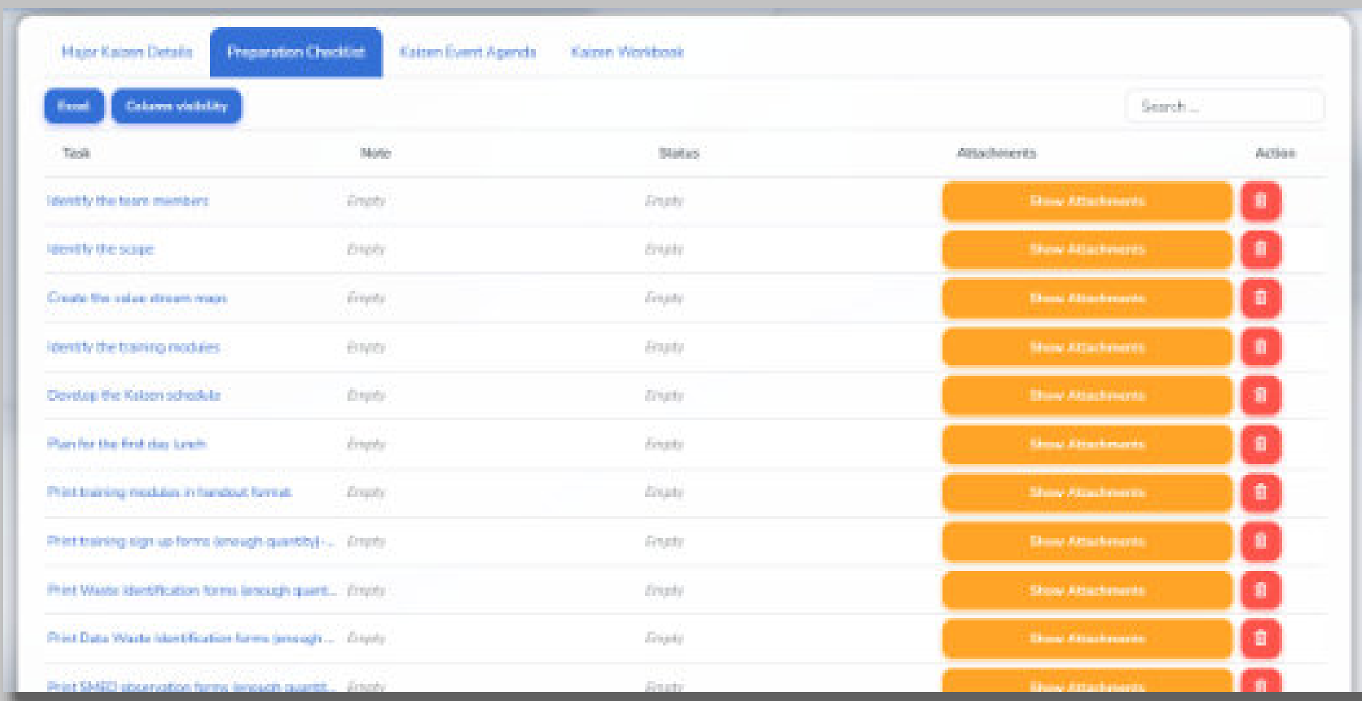
Each task in the checklist includes the following:

Task – The action item that needs to be completed.

Notes – A space to add any relevant details or updates related to the task.

Status – Indicates the progress of the task (e.g., not started, in progress, completed).

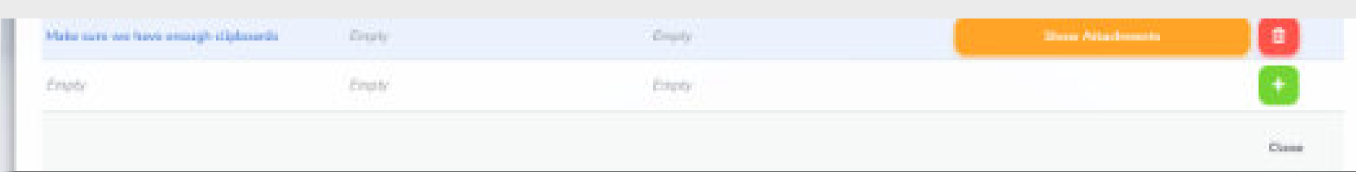
Attachments – You can upload supporting documents or files for each task as



Adding New Tasks

To create a new task, simply type the task into the **Task** column and click the green + button. This will add the task to the checklist.

Use this tab to ensure all preparation activities are completed before moving forward with the kaizen event.



Kaizen Event Agenda Tab

This tab is used to build and organize the schedule for the kaizen event. Each agenda item represents a specific activity planned during the event.

To create an agenda item, fill out the following fields:

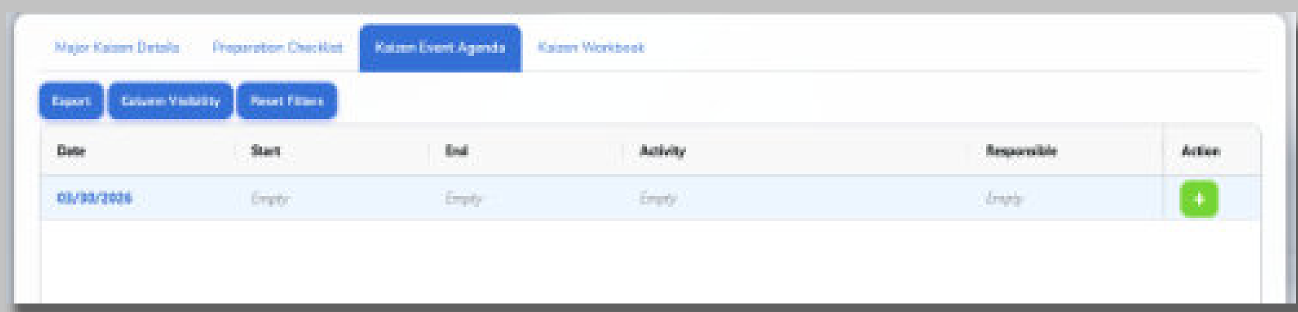
Date – Select the day the activity will take place.

Start Time – Enter the time the activity begins.

End Time – Enter the time the activity ends.

Activity – Describe the task, meeting, or focus for that time period.

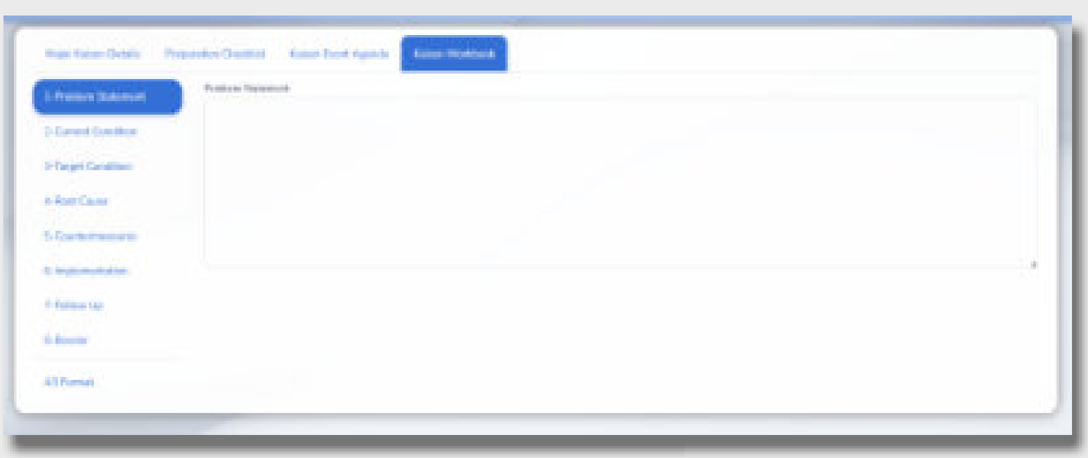
Responsible – Assign the person responsible for leading or completing the activity.



Kaizen Workbook Tab

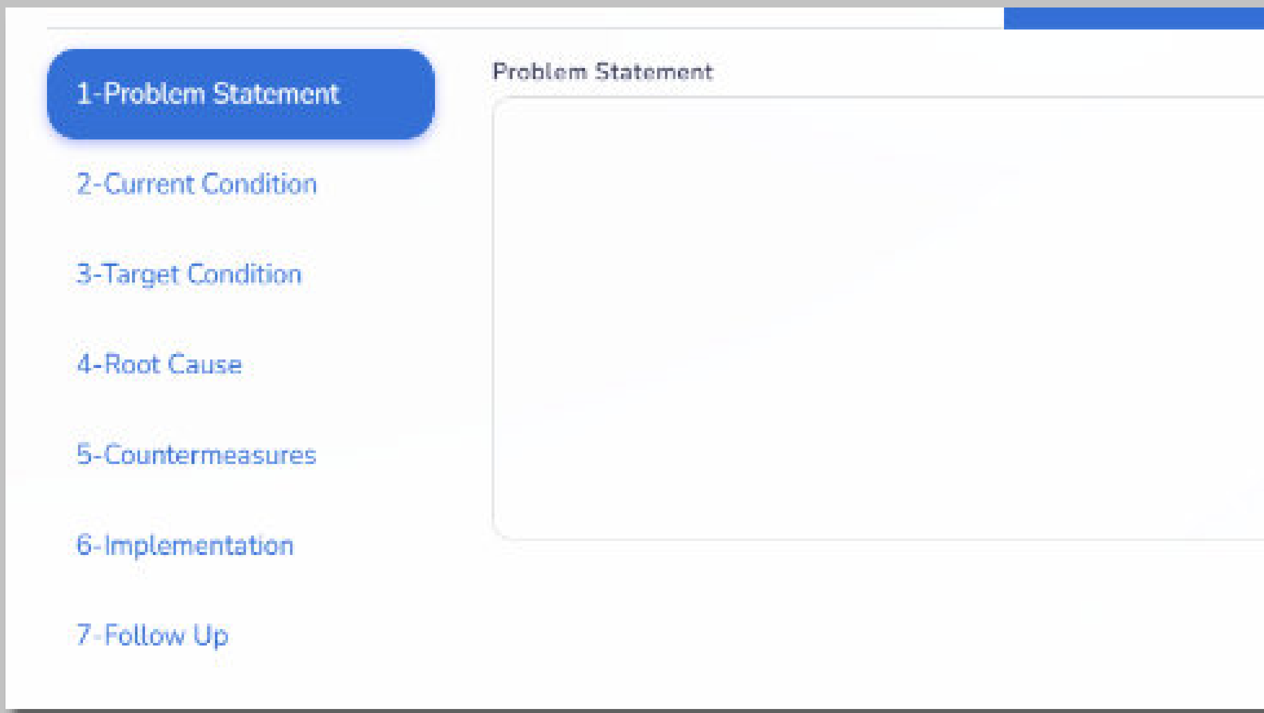
The final tab is the **Kaizen Workbook**. Completing this workbook will generate an **A3 Report** for the kaizen event, capturing all key details and outcomes in a structured format.

There are eight sections to complete:



1. Problem Statement

This is where the kaizen problem is clearly defined in a concise, focused statement.



2. Current Condition

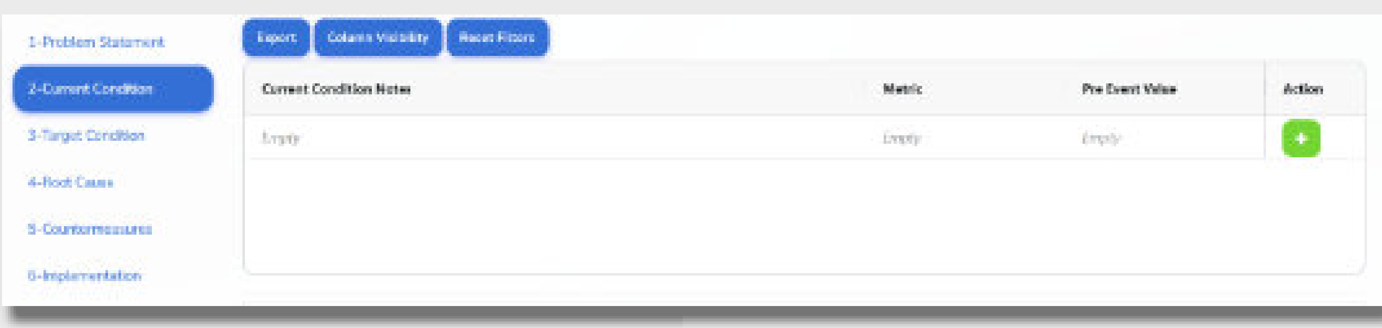
This section includes a table with the following fields:

Current Condition Notes – Description of the current state

Metric – The metric being evaluated

Pre-event Value – The current value of the metric

This allows the team to document baseline performance. There is also an option to attach supporting documents.

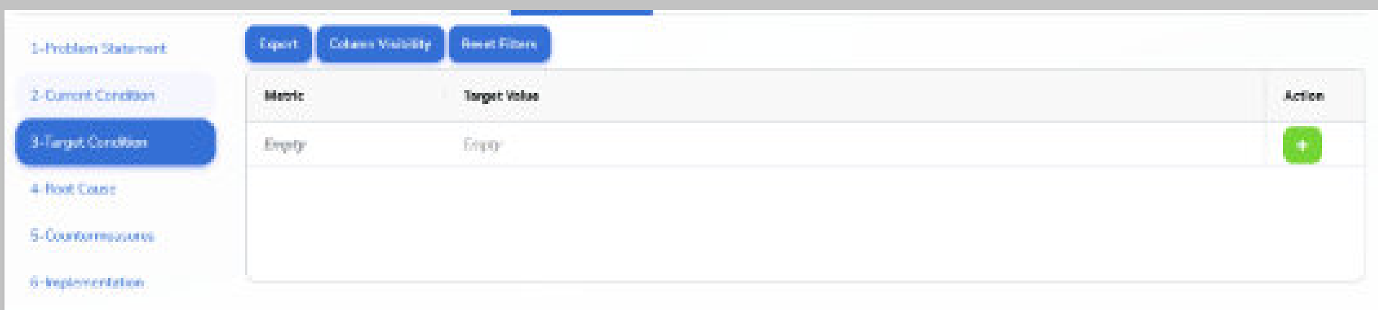


3. Target Condition

This table defines the desired future state with the following fields:

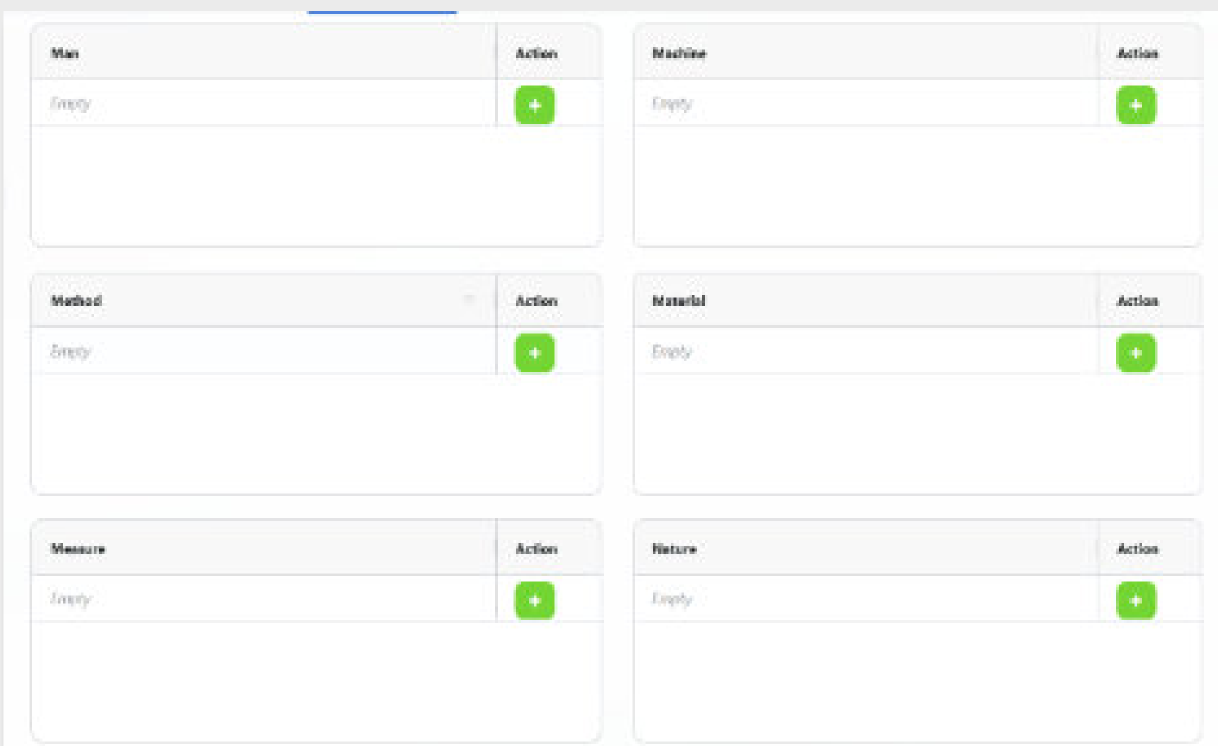
Metric – The metric being improved

Target Value – The goal value to achieve



4. Root Cause

This section uses multiple tables based on the 6M fishbone method to identify root causes:



Man – Human factors such as skills, training, communication, or staffing that may contribute to the issue.

Machine – Equipment, tools, or technology that may be causing or influencing the problem.

Method – Processes, procedures, or ways of working that may be inefficient or unclear.

Material – Raw materials, components, or supplies that may impact quality or performance.

Measure – Data, metrics, or measurement systems that may be inaccurate, missing, or misleading.

Nature – Environmental or external factors such as temperature, humidity, or workplace conditions that may affect outcomes.

5. Countermeasures

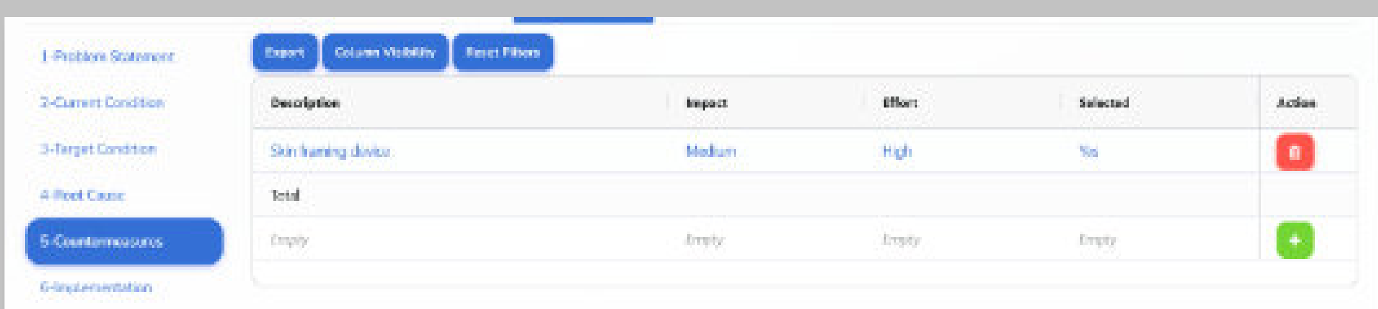
This table is used to define potential solutions:

Description – Details of the countermeasure

Impact – Dropdown (Low / Medium / High)

Effort – Dropdown (Low / Medium / High)

Selected – Dropdown (Yes / No)



6. Implementation

This section tracks execution of selected countermeasures:

Countermeasure Description – Dropdown from the Countermeasures section

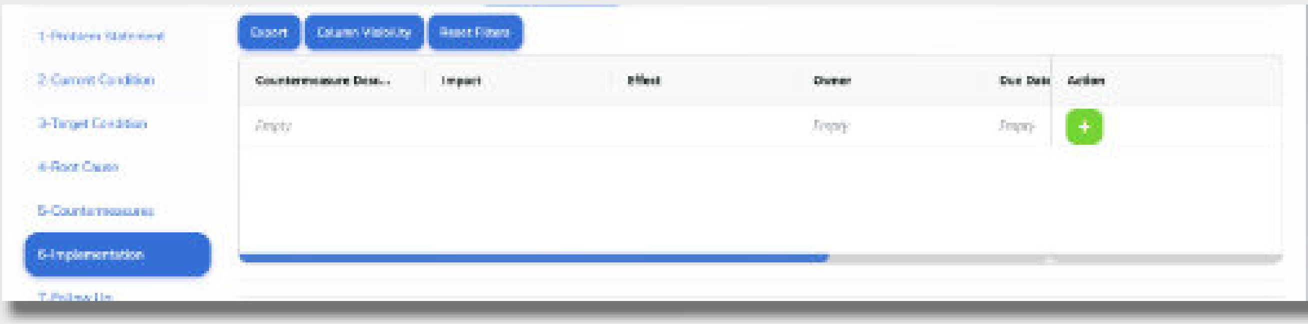
Impact – Auto-filled from the selected countermeasure

Effort – Auto-filled from the selected countermeasure

Owner – Assigned individual

Due Date – Target completion date

Status % – Progress tracking as a percentage

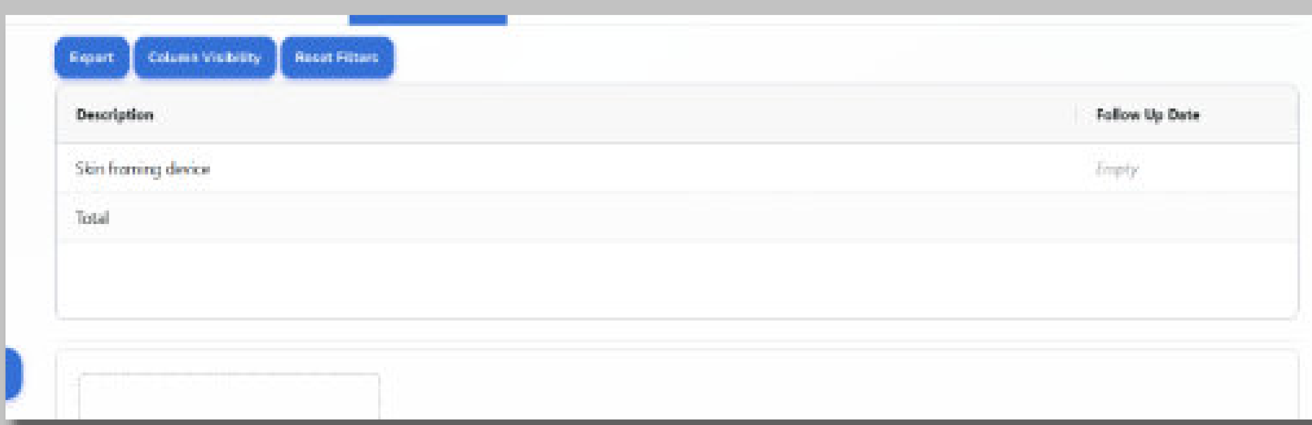


7. Follow Up

This table schedules follow-up actions:

Description – Countermeasure description

Follow-Up Date – Date to review progress or results



8. Bowler

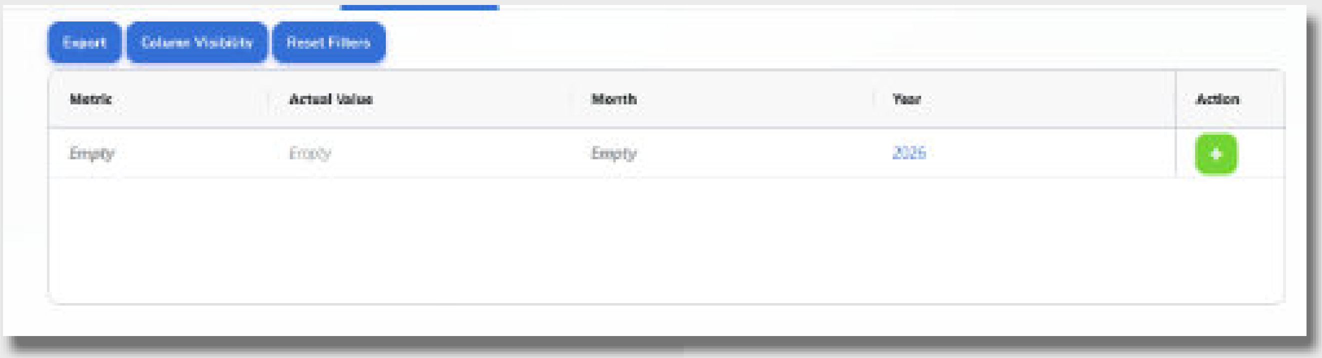
This section tracks performance over time to measure effectiveness:

Metric – Selected metric

Actual Value – Measured result

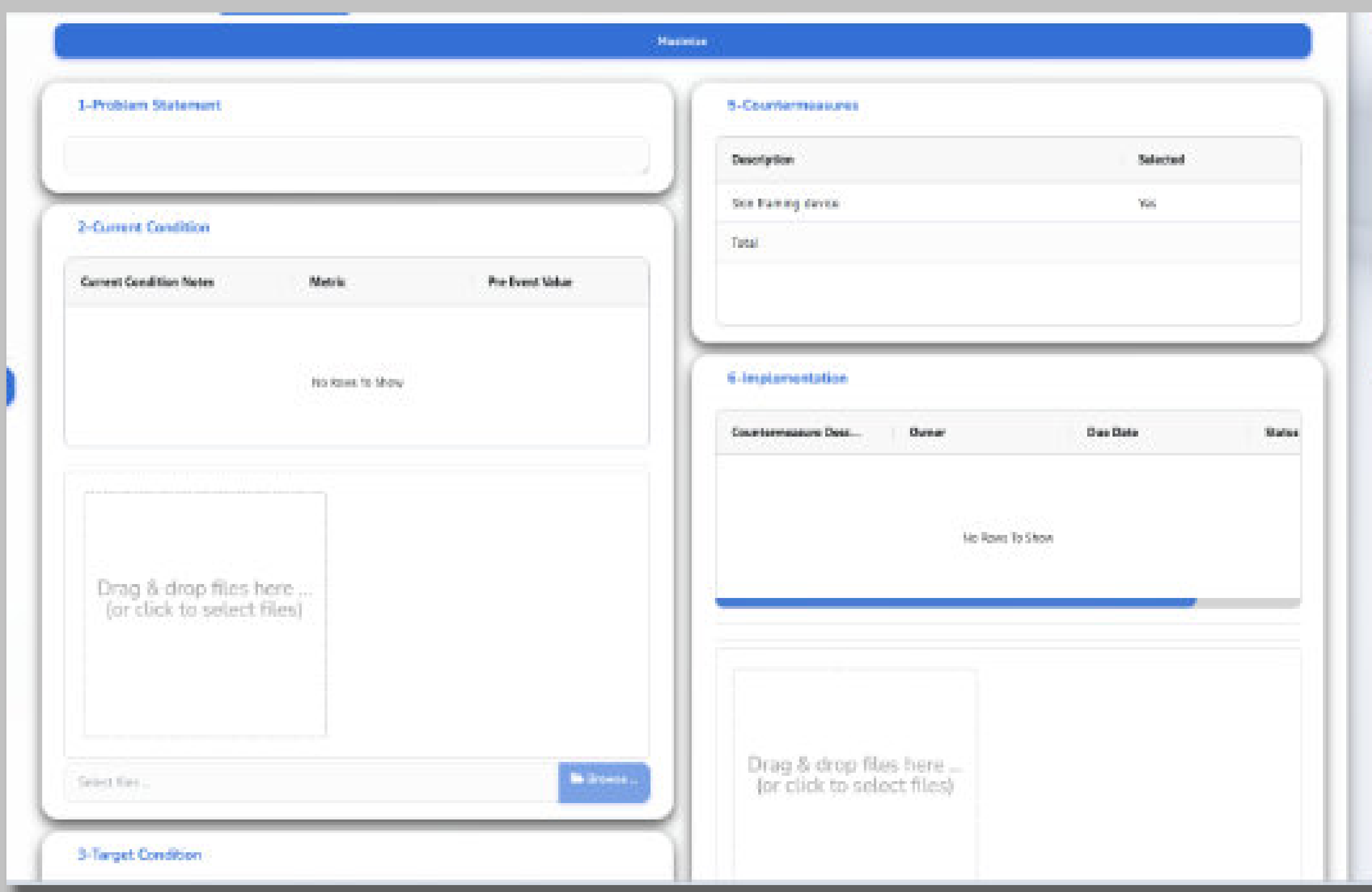
Month - The month of the measurement

Year - The year of the measurement



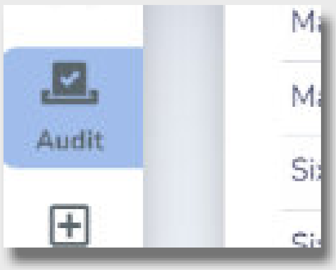
A3 Report

The final section is the **A3 Format**, which compiles all the information from the workbook into a standardized, one-page report. This provides a clear summary of the



AUDIT

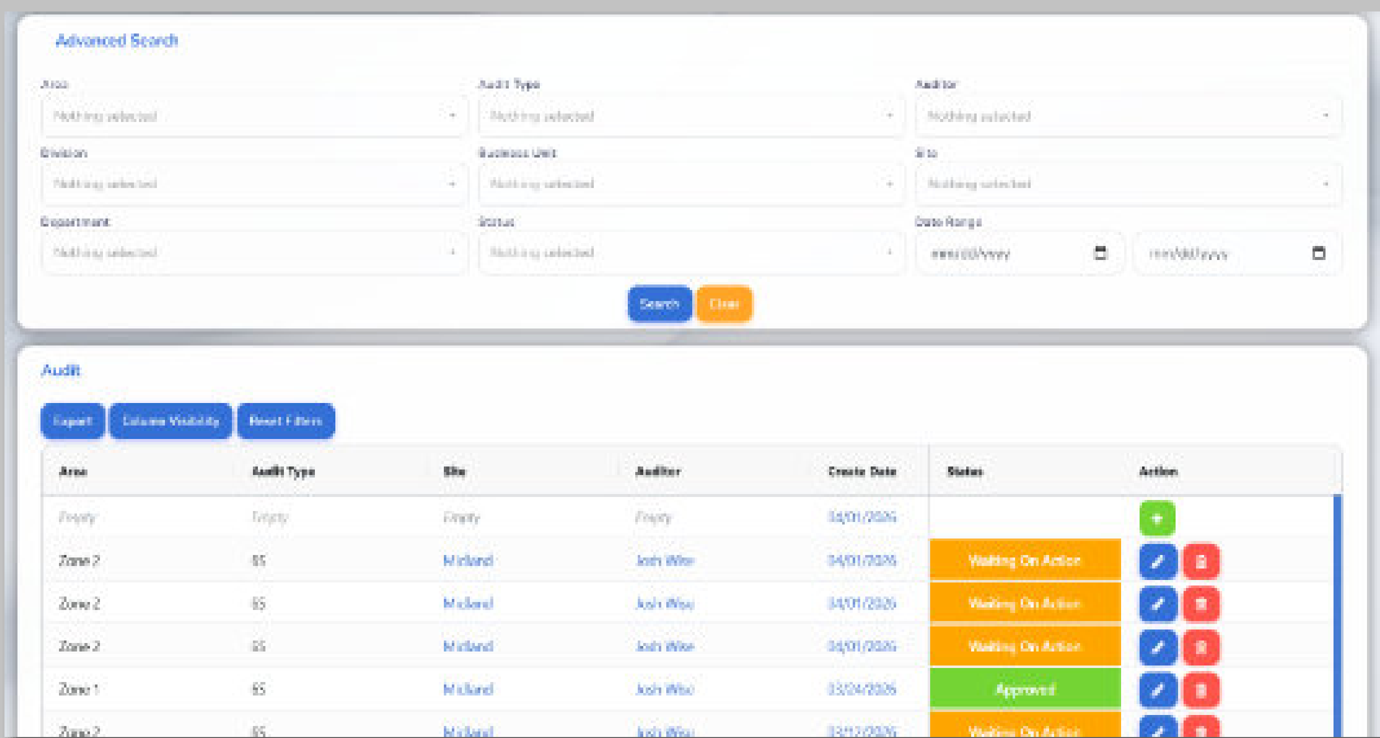
Audits play a critical role in a manufacturer's Operational Excellence (OpEx) and continuous improvement strategy by ensuring that processes are being followed as designed and are delivering the expected results. They provide a structured way to identify gaps, verify standard work, and uncover opportunities for improvement. By regularly reviewing operations, audits help sustain gains from kaizen activities, reinforce accountability, and drive consistency across sites. Ultimately, they serve as a feedback loop that supports ongoing improvement and helps organizations maintain high levels of performance.



Accessing the Audit Screen

To assign or perform an audit, click **Audit** from the left-hand side menu. This will open the **Audit** screen.

All audits are displayed in a table format, with each row representing an individual audit.



The table includes the following columns:

Area – The area or process to be audited.

Audit Type – The type or category of the audit.

Site – The location where the audit will take place.

Auditor – The person assigned to perform the audit.

Create Date – The date the audit was created.

Due Date – The date the audit is expected to be completed.

Mass Audit Count – Allows you to create multiple audits at once by increasing this number.

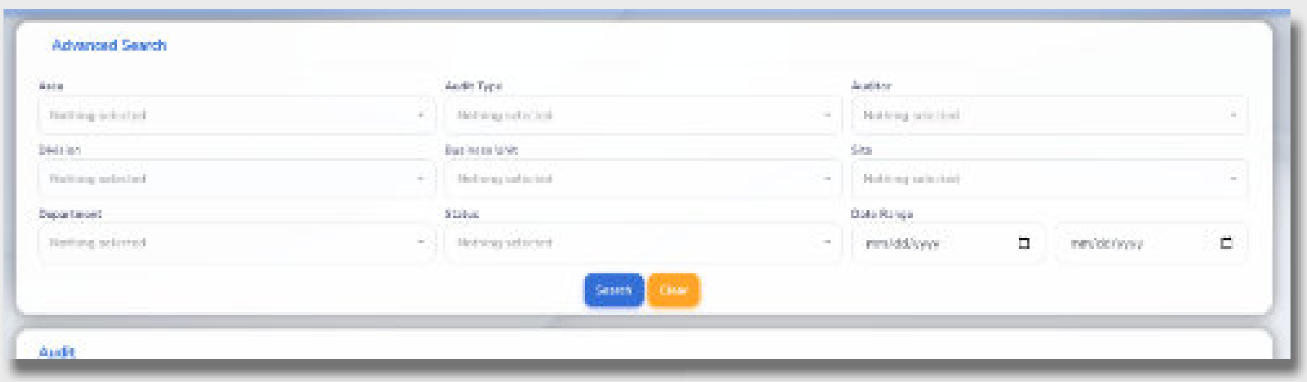
Area Score – The score or result of the audit.

Status – Indicates the current state of the audit (e.g., pending, completed).

Action – Contains options to interact with the audit, such as editing or completing it.

Using the Advanced Search

At the top of the screen is the **Advanced Search** function. This allows you to filter and search the audit list using any of the available criteria above. Enter your search



Creating and Assigning an Audit

To create and assign a new audit, begin by filling out the empty fields in the top row of the audit table.

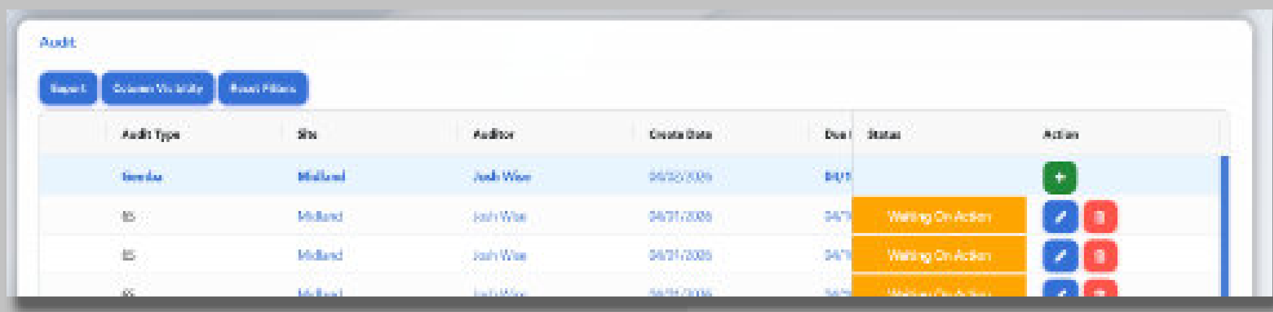
Enter the required information, such as:

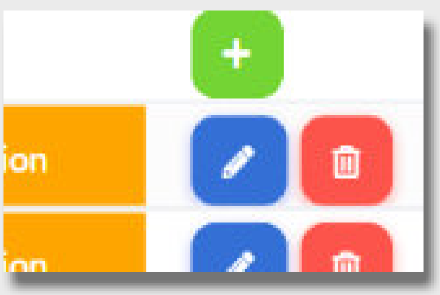
- **Area**
- **Audit Type**
- **Site**
- **Auditor**
- **Due Date**

- **Mass Audit Count (if creating multiple audits)**

Once all fields are completed, click the green + button to add the audit.

If a number greater than 1 is entered in the Mass Audit Count field, that number of audits will be created automatically. This is useful for scheduling recurring or multiple audits at once.





Opening an Assigned Audit

To complete an audit that has been assigned to you, start by locating it in the **Audit table**. If needed, use the **Advanced Search** function to quickly find the specific audit.

Audits that are ready to be completed will typically have a status of "**Waiting On Action**."

Once you've found the audit, click the blue **Edit** button (pen icon) in the **Action** column. This will open the **Audit popup**, where you can review and complete the

Completing the Audit

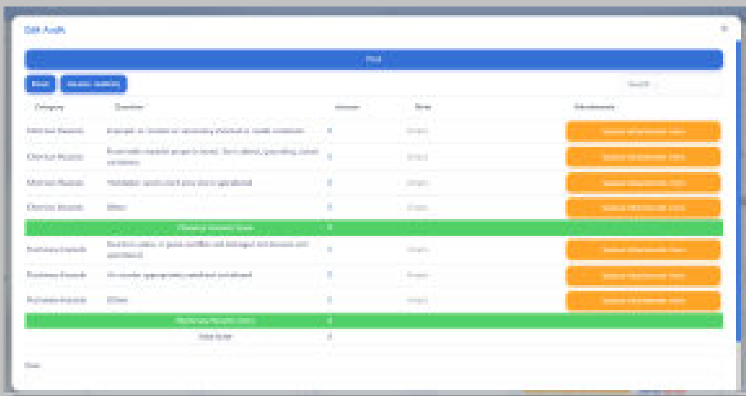
Once the audit popup is open, you will see the audit organized into a table. Each row represents a question that must be answered as part of the audit.

The table includes the following fields:

Category – The audit category the question belongs to.

Question – The specific audit question being asked.

Answer – A dropdown where you select the appropriate response. Available answers

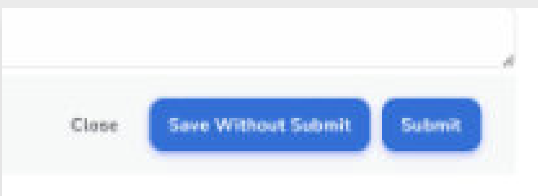


are configured at the site level.

Note – Use this field to enter any additional comments or observations.

Attachments – Upload supporting documents or images as needed.

Go through each question and provide the appropriate responses.

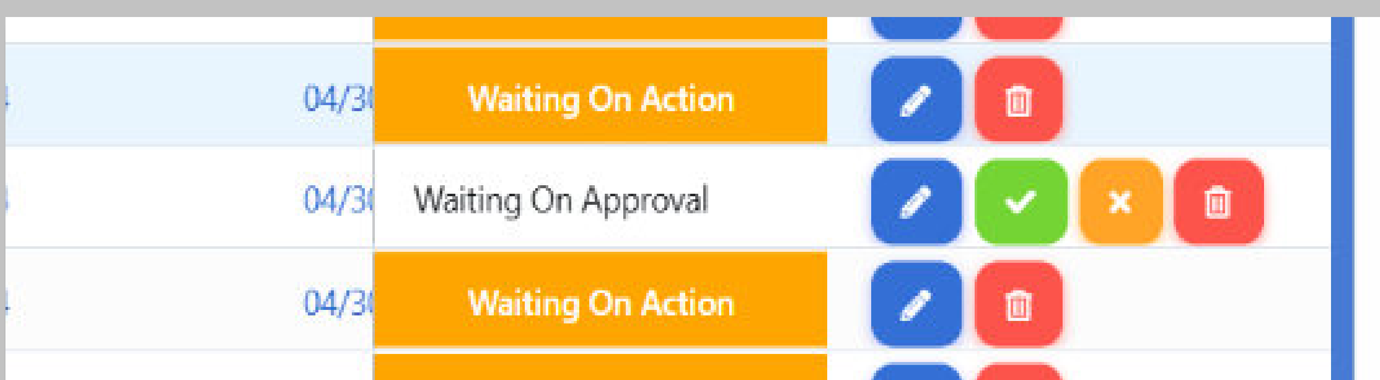


Once all questions have been completed, click **Submit** to send the audit for approval.

If you are not ready to submit, you can click **Save Without Submit** to save your progress and return to the audit later.

Approving an Audit

To approve a submitted audit, start by locating it in the **Audit list**. Audits that are ready for review will show a status of "**Waiting On Approval**" in the **Status** column.



To review the audit details, click the **Edit** button (pen icon) in the **Action** column.

After reviewing the audit:

- Click the **green checkmark** button to **approve** the audit
- Click the **orange X** button to **reject** the audit

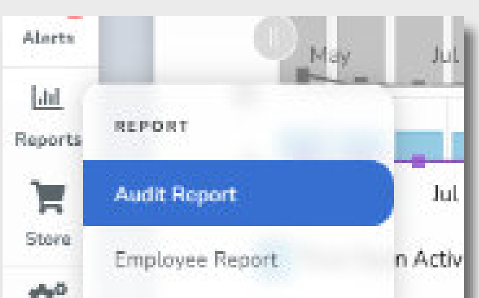
Once an audit is approved, the **Status** column will update to "**Approved**."

REPORTS

The Reports section provides visibility into performance, activity, and results across the platform. In this guide, we will focus on key reports including the **Audit Report**, **Employee Report**, and the **Individual Report**. These reports help track progress, measure impact, and provide insights into both team and individual contributions. While additional reports are available within the system, this section will cover the most commonly used ones for monitoring Operational Excellence and continuous improvement efforts.

AUDIT REPORT

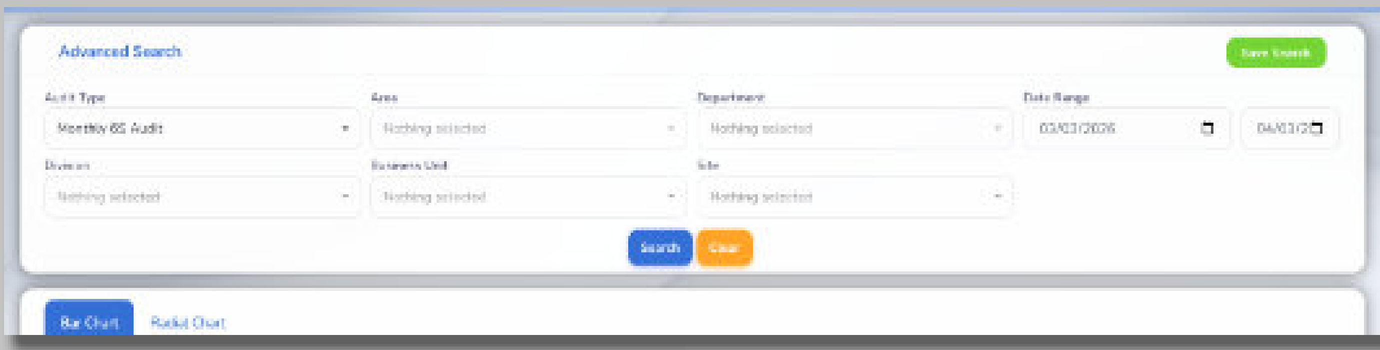
The **Audit Report** aggregates audit data into visual charts, making it easy to analyze performance and trends across audits. It provides a high-level view of audit results, helping identify areas of strength and opportunities for improvement. This report supports better decision-making by turning audit data into clear, actionable insights.



Running an Audit Report

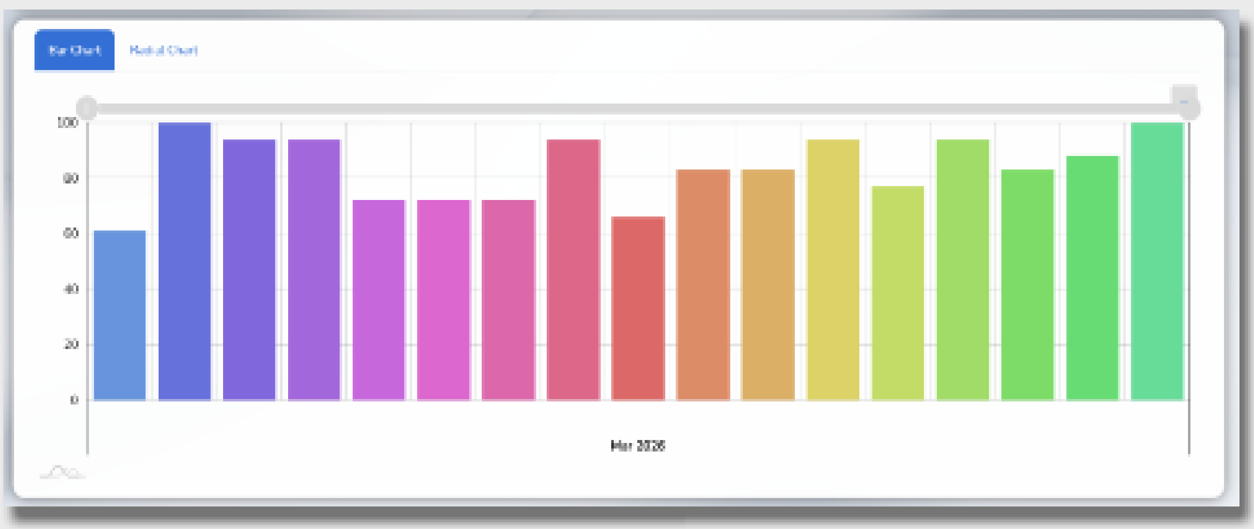
To run an audit report, hover over the Reports icon on the left-hand side menu and select Audit Report from the dropdown. This will take you to the Audit

At the top of the screen, use the Advanced Search criteria to filter the data and generate a report based on your selected parameters. Enter your criteria and run the report to view the results in chart format. The results are displayed in both a **Bar Chart** and a **Radial Chart**.



Bar Chart

In this view, each audit is represented as a bar on the graph. The height of each bar reflects the total score of that audit, making it easy to compare performance across



Radial Chart

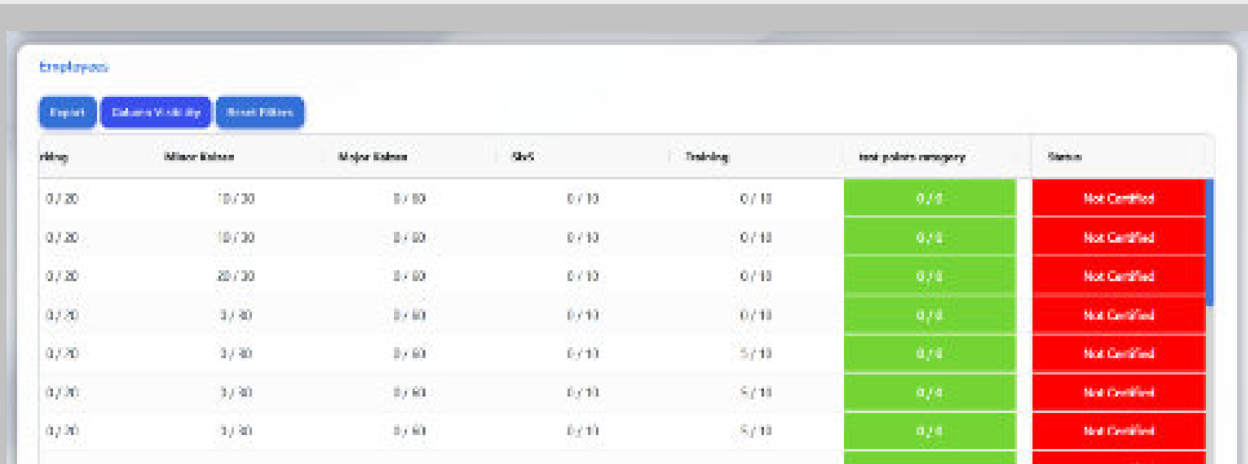
This view displays audit data in a circular (radial) format. Each category within the audit is shown as a spoke on the chart, allowing you to see how different areas performed within each audit.

EMPLOYEE REPORT

The **Employee Report** provides an overview of each employee's participation and progress in continuous improvement activities. It highlights engagement across areas such as kaizens, audits, and other initiatives. This report helps track individual contributions and identify opportunities to increase involvement and development.

To run the Employee Report, hover over the **Reports** section in the left-hand side menu and select **Employee Report** from the dropdown.

This will open the **Employee Report** screen, where you can view and analyze employee activity and progress in continuous improvement efforts.



Viewing Employee Report Results

The **Employee Report** is displayed as a table, with each row representing an individual employee. The columns show participation in various continuous improvement activities, measured by the number of points earned.

The table includes the following columns:

Employee – The employee's name.

Teaching – Points earned from teaching activities.

Book Summary – Points earned from submitted book reports.

Benchmarking – Points earned from benchmarking trips.

Minor Kaizen – Points earned from minor kaizen contributions.

Major Kaizen – Points earned from participation in major kaizens.

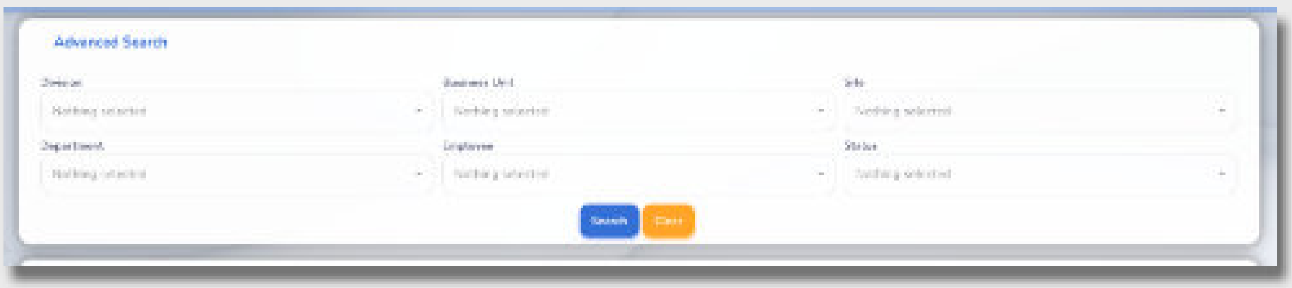
Audits – Points earned from completing audits.

Training – Points earned from training activities.

Purchase Points – The number of points the employee has spent.

Total Points – The total points accumulated by the employee.

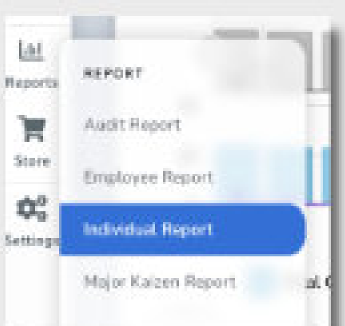
Status – Indicates wheher the employee has achieved Lean certification.



At the top of the table is a search box that allows you to filter the report based on specific criteria, making it easy to find and analyze individual or group performance.

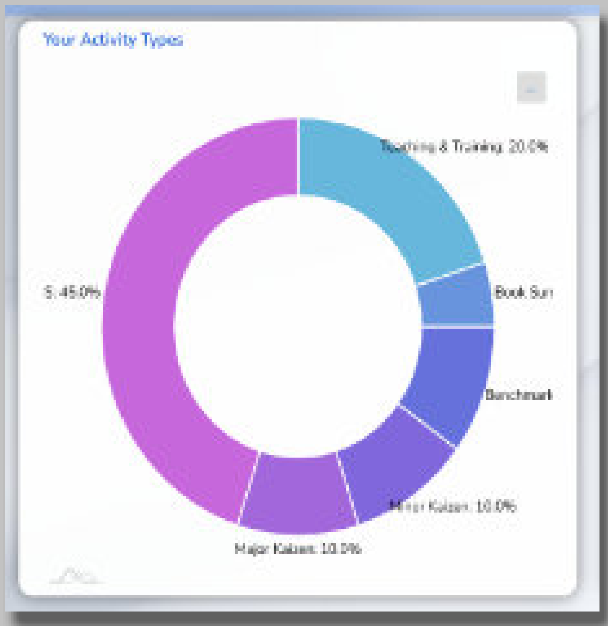
INDIVIDUAL REPORT

The Individual Report provides a personalized view of your activity and performance within the system. It displays your participation and points earned across various continuous improvement activities. This report helps you track your progress and stay engaged with your Lean development goals.



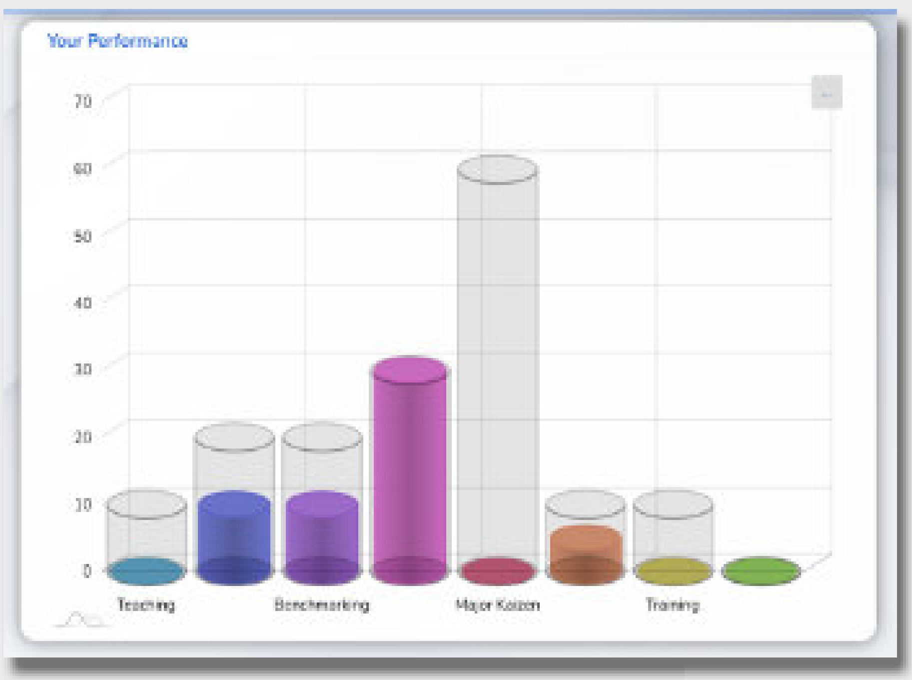
Opening and Viewing the Individual Report

To open the Individual Report, hover over the **Reports** icon in the far left menu and select Individual Report from the dropdown. This will open your **Individual Report**.



The Individual Report includes two charts:

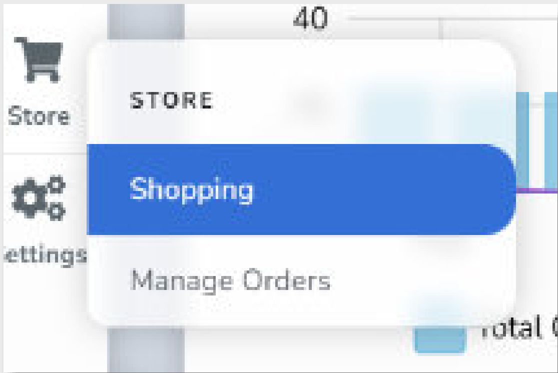
Your Activity Types – This is a pie chart that breaks down your participation across different Lean activities. Each section of the pie represents a specific activity type. Clicking on a section will take you to a detailed page showing a list of those activities.



Your Performance – This chart shows the number of points you have earned compared to the total points required for Lean certification. It helps you track your progress toward achieving certification and understand how close you are to your goal.

STORE

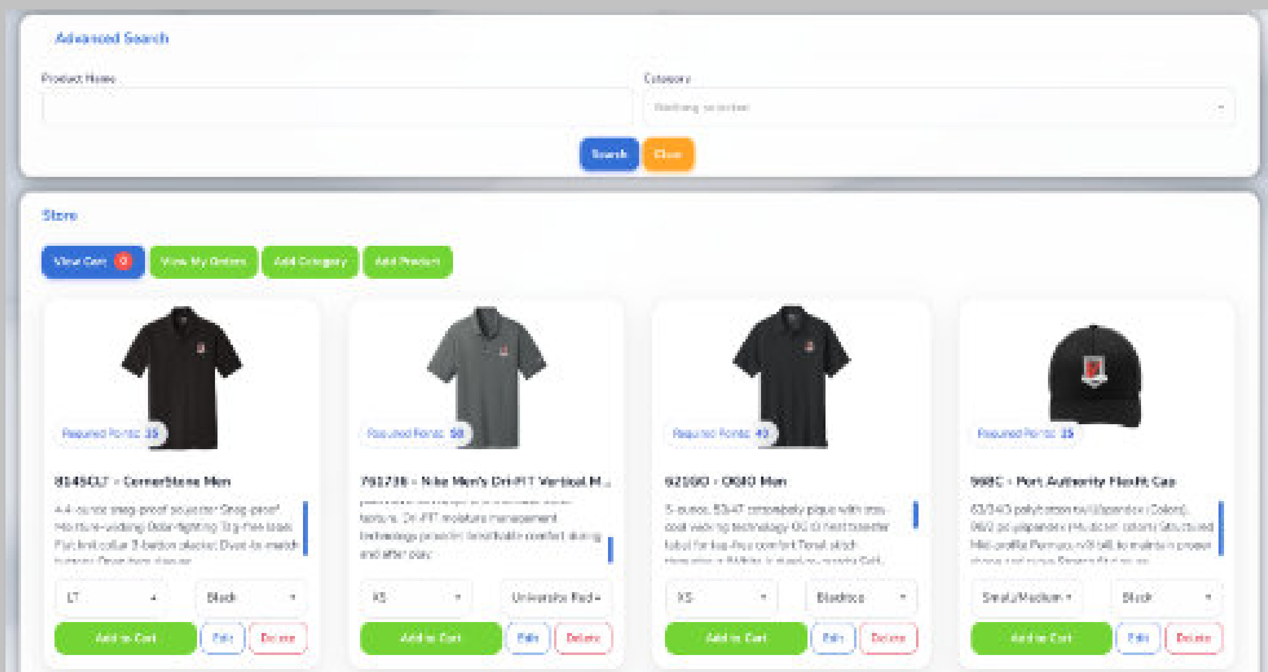
The Store allows users to redeem the points they've earned through continuous improvement activities for company merchandise. As employees participate in activities like kaizens, audits, and training, they accumulate points that can be spent in the store. This provides an added incentive for engagement and rewards contributions to Operational Excellence efforts.



Accessing the Store

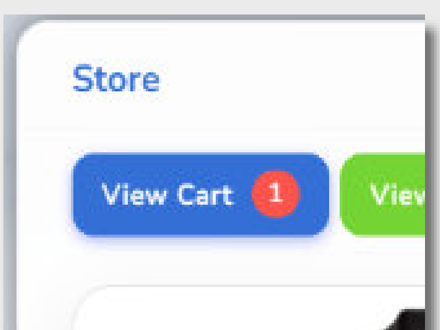
To access the **Store**, hover over the Store icon in the left-hand side menu and select **Shopping** from the dropdown.

This will open the Store page, where you can browse available items and redeem your points for company merchandise.

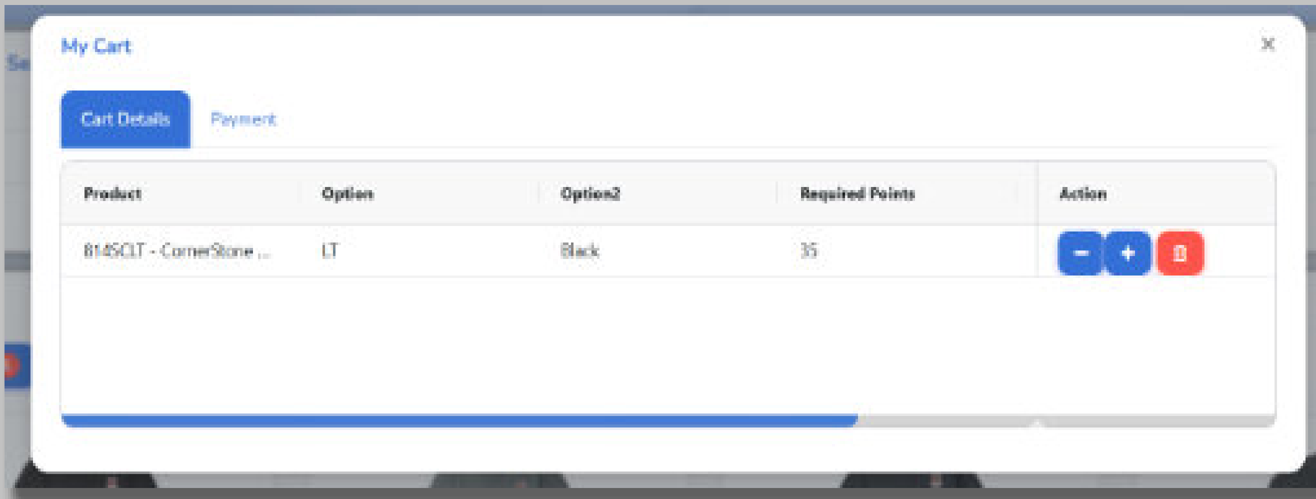


Purchasing Items with Points

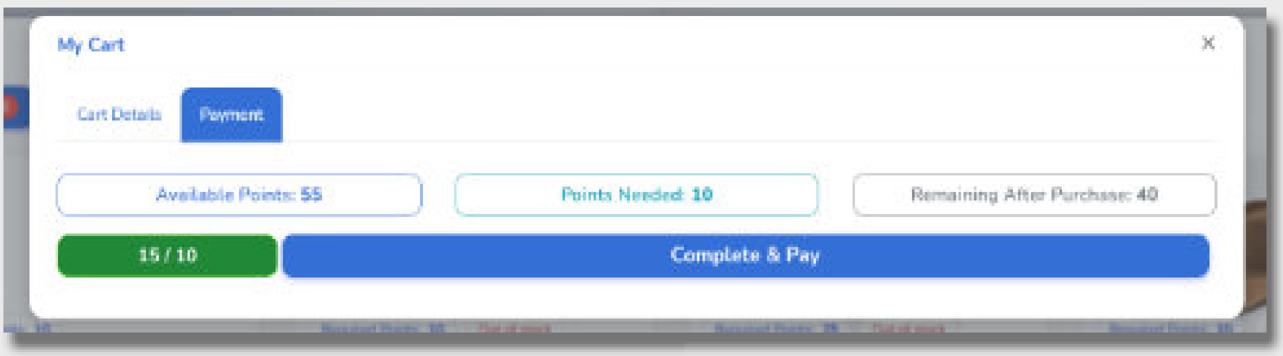
To purchase items from the Store, click **Add to Cart** under the item(s) you wish to redeem. If the item has options such as size or color, be sure to select those before adding it to your cart.



When you're ready to check out, click **View Cart** located just under the search bar. This will open the **My Cart** popup, which has two tabs:



Cart Details – Displays all items currently in your cart, allowing you to review your selections.



Payment – Shows your available points, the total cost of the items in your cart, and the remaining points after the purchase.

To complete your order, click **Complete & Pay**. Once submitted, your HR team (or designated store manager) will be notified and will coordinate getting your items to you**.**

CONCLUSION

This guide provided an overview of the key features and functionality within the system, including dashboards, continuous improvement activities, reporting, audits, kaizens, and the store. By following the steps outlined in each section, users should be able to confidently navigate the platform, contribute to improvement efforts, and track their progress. For more detailed information, refer to the Knowledge Base available within the application. If you have any questions or need assistance, please contact josh@optegritysolutions.com.