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 one of the foundational tools 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, while also enabling traceability through the capture of critical measurements and inspection data. 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 as well as customer satifaction and retention. This Quickstart Guide will walk you through the basics of using Gigbot, helping you maximize its potential to transform your quality processes.

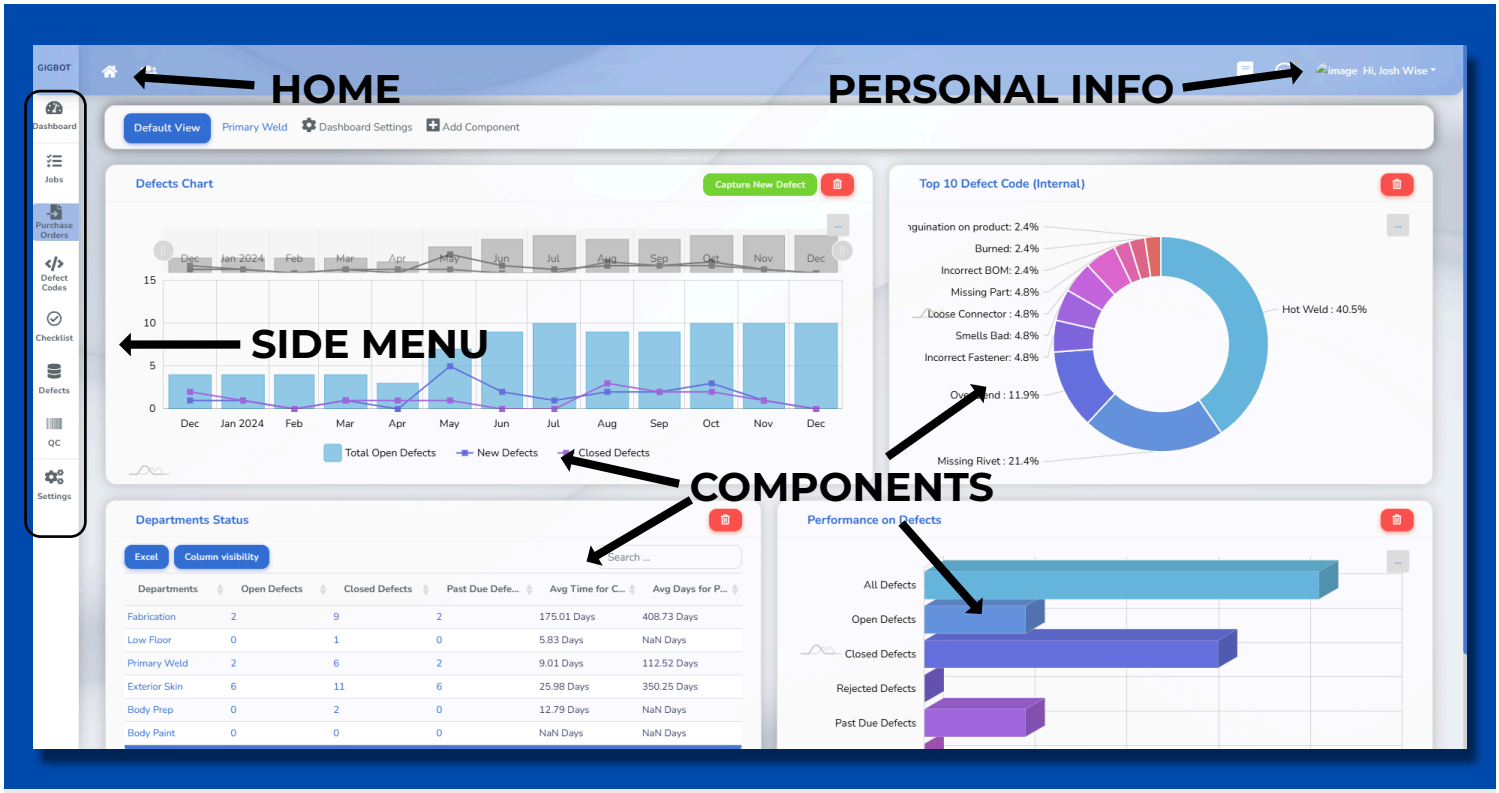
WHAT'S INSIDE

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.
    - **Detecting Defects**: The process of identifying potential or actual defects during inspections, checklist execution, or measurement activities before they are recorded, corrected, or verified.
    - **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**: The product or unit being manufactured, used as the primary reference for assigning and tracking defects and quality data within Gigbot.
- **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.

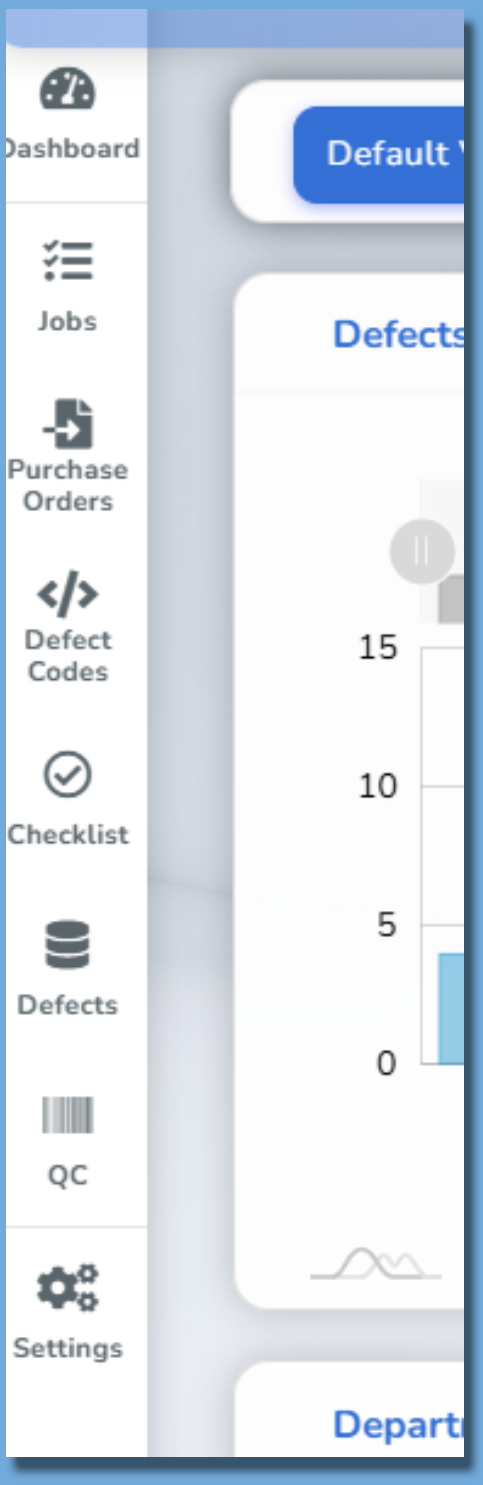


Home - This button takes you to your Optegrity home page, where you can access other Optegrity applications, view global settings, and update your user profile.

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. Gigbot can also interface with your ERP to import this data automatically.

Purchase Orders - This section is used to add and manage supplier purchase orders, enabling you to measure supplier quality performance.

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

Checklist - Here, you can edit and run checklists.

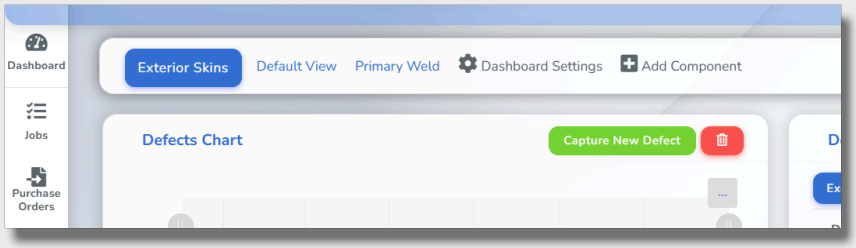
Defects - This is your defect database, where you can search, view, and manage logged defects.

QC - This section is where you manage QC measurement and traceabilty.

Settings - This button takes you to application specific settings.

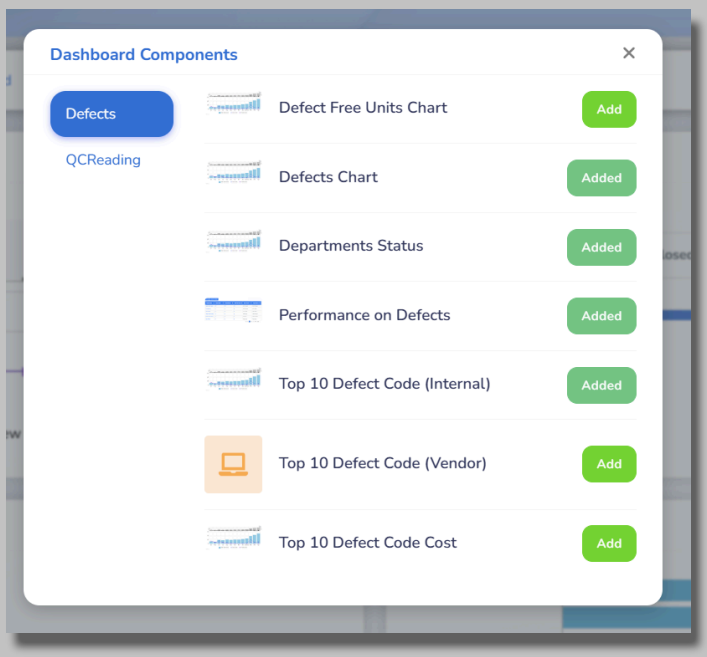
CREATING AND EDITING DASHBOARDS

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.



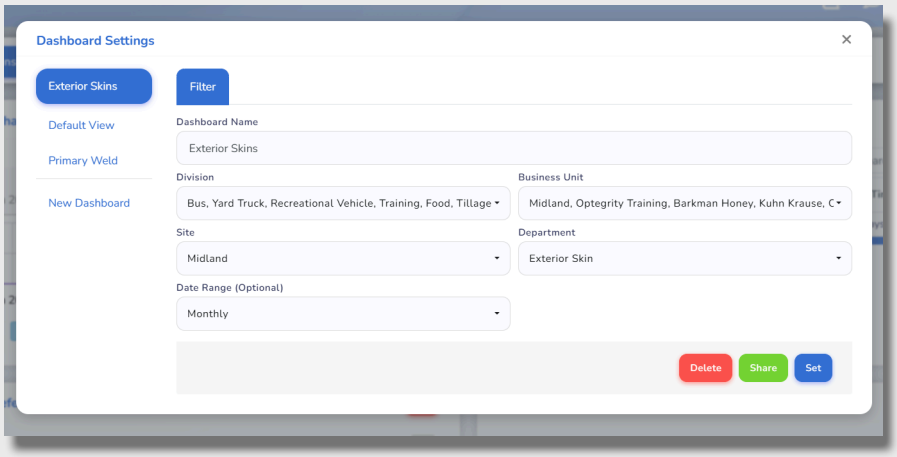
Locate Dashboard Controls

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



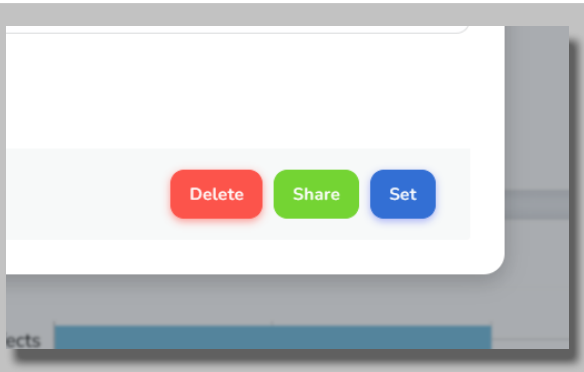
Add a Component to a Dashboard

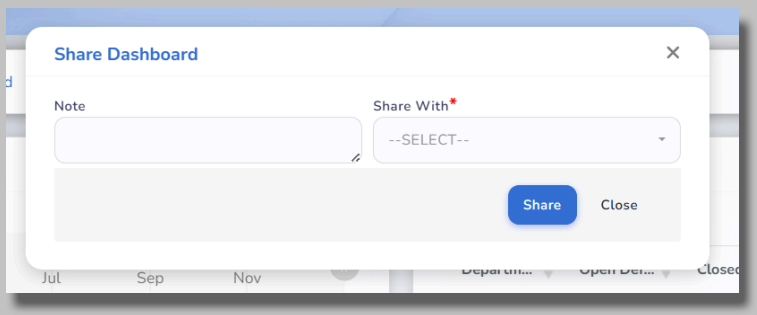
1. Click the "**Add Component**" button to bring up the component selector screen.
2. Browse the list to find the component you want to add, then click "**Add**" to place it on your dashboard.



Edit an Existing Dashboard

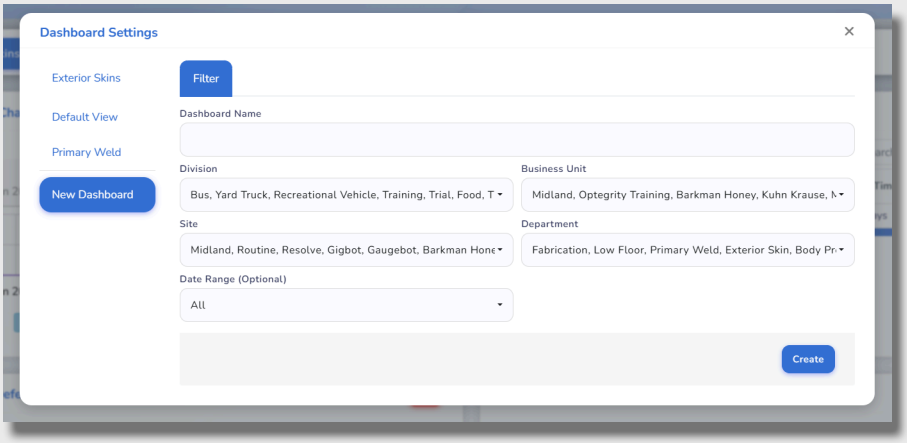
1. Click the "**Dashboard Settings**" button to open the settings popup.
2. From the list on the left-hand side, select the dashboard you want to edit.
3. Adjust the scope of data by choosing from the **Division**, **Business Unit**, **Site**, and **Department** dropdowns.





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:

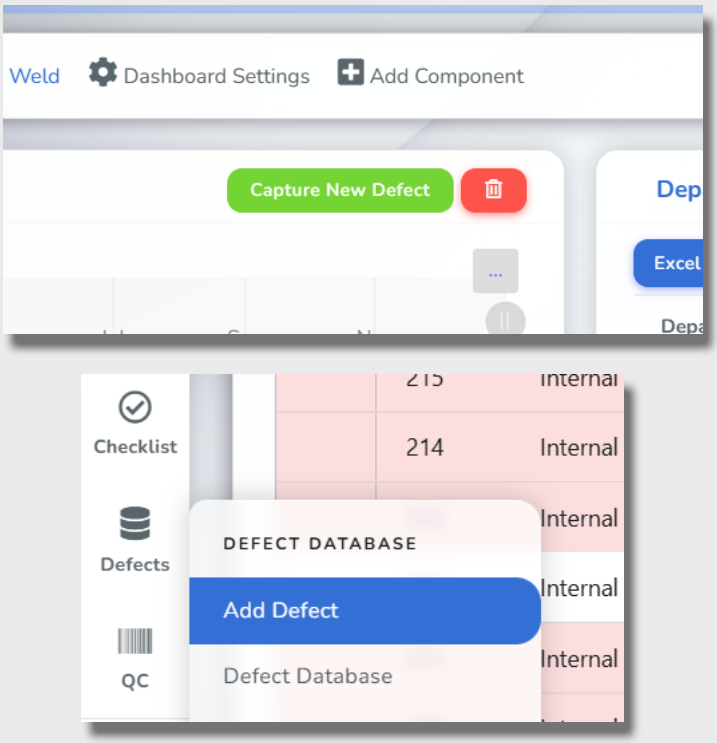
1. **Freely Capturing Defects:**
   The simplest and most foundational method, allowing users to log defects as they are discovered. This approach is ideal for companies starting their defect management journey or handling unexpected issues.

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.

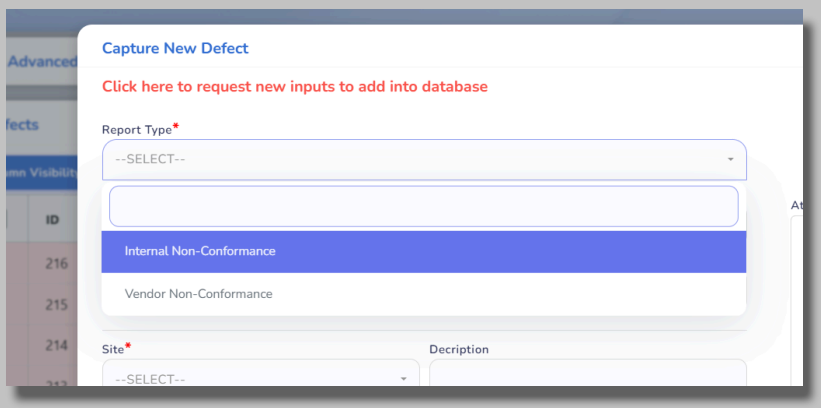
DEFECT CAPTURE METHOD 1: FREELY CAPTURING DEFECTS

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:



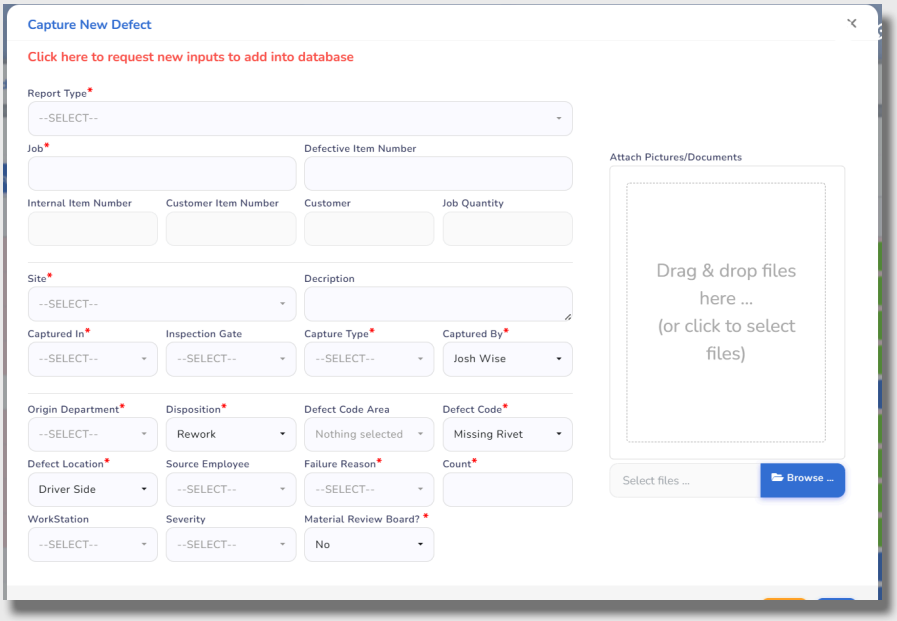
Accessing the "Add New Defect" Screen

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. Typically this is either an In-Process Inspection or a Post-Process Inspection

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 (e.g., workmanship, supply shortage, damage).

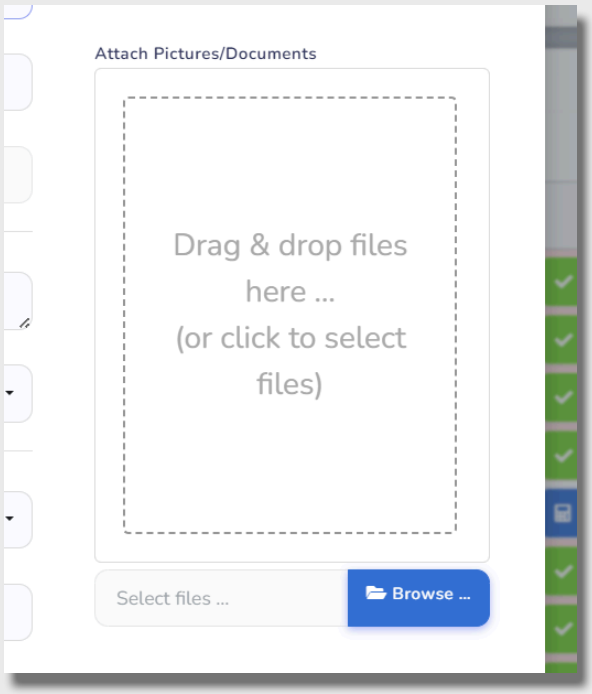
Count*: Specify how many times this defect occurs on the job or unit.

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.

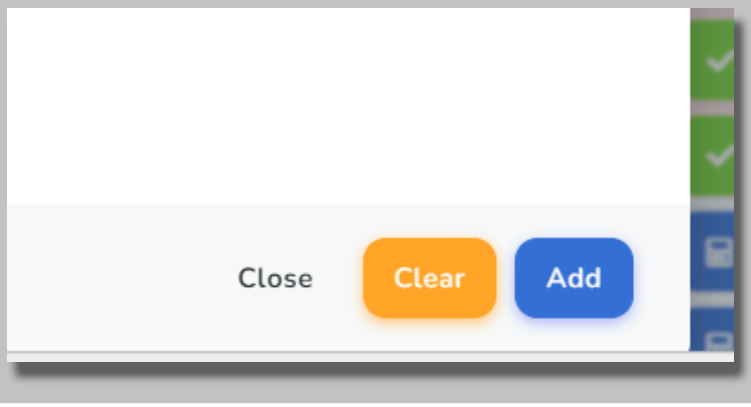
Site*: Select the site where the workstation is located.

Severity: Rate the severity of the defect.



Adding Attachments

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

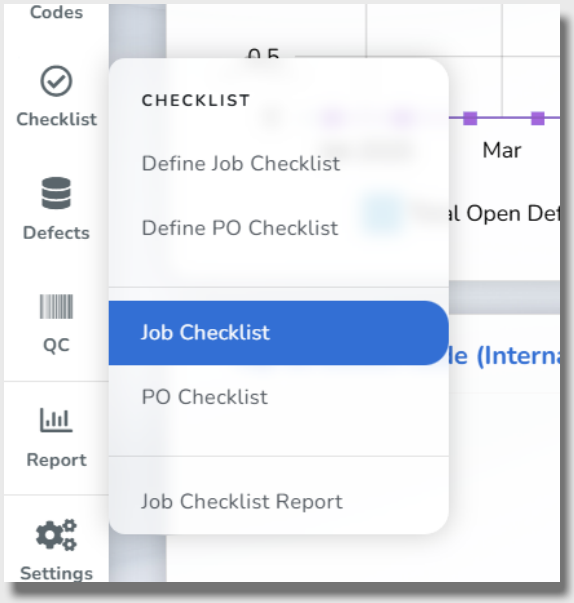


Finalizing the Defect

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

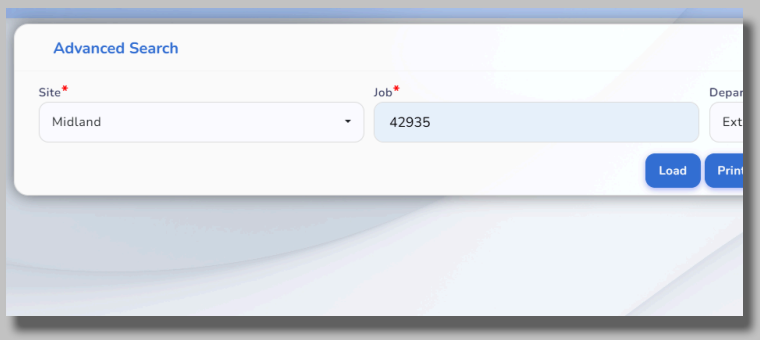
DEFECT CAPTURE METHOD 2: USING CHECKLISTS

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

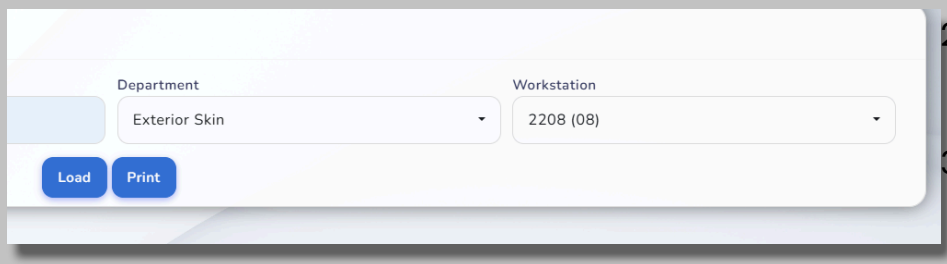
1. Hover over the "**Checklist**" menu item on the side menu and select "**Job Checklist**" from the dropdown.
2. This will take you to the **Checklist Search Screen**.

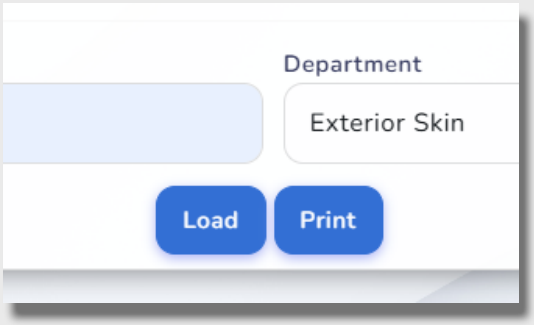


Locating the Checklist

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

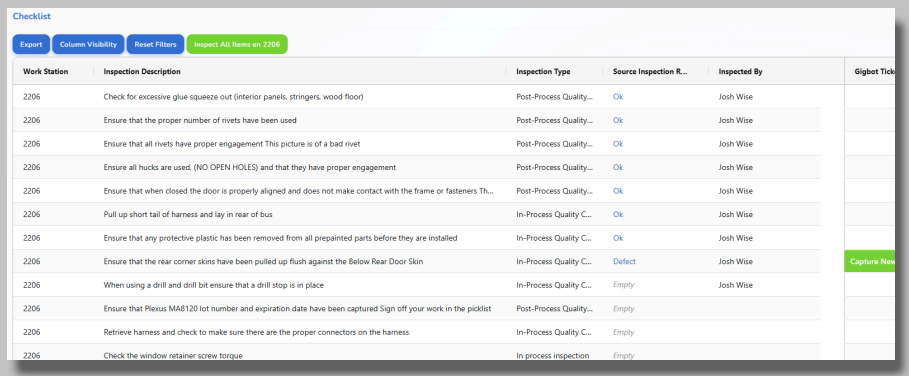
1. Select the "**Site**" from the dropdown menu.
2. Enter the **Job Number** in the **Job** field.
3. Choose the appropriate **Department** and **Workstation** where the checklist has been assigned.

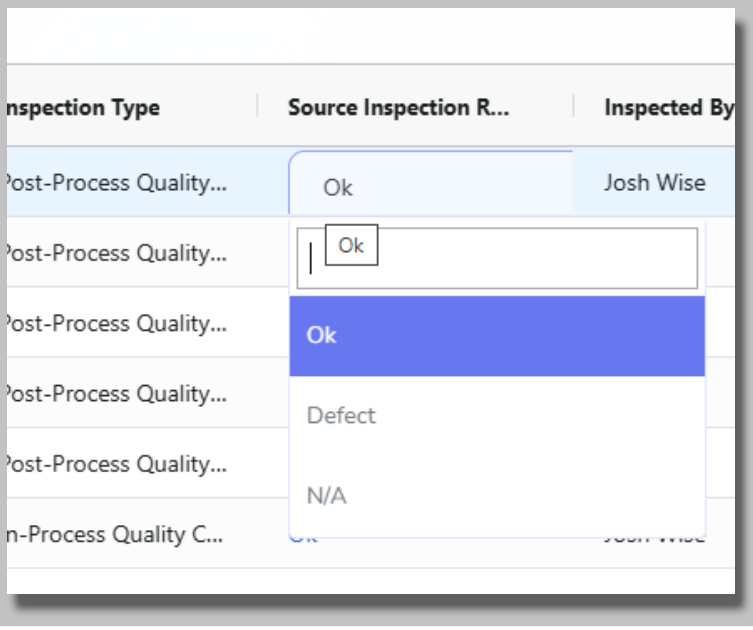




Loading the Checklist

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





Inspecting Items

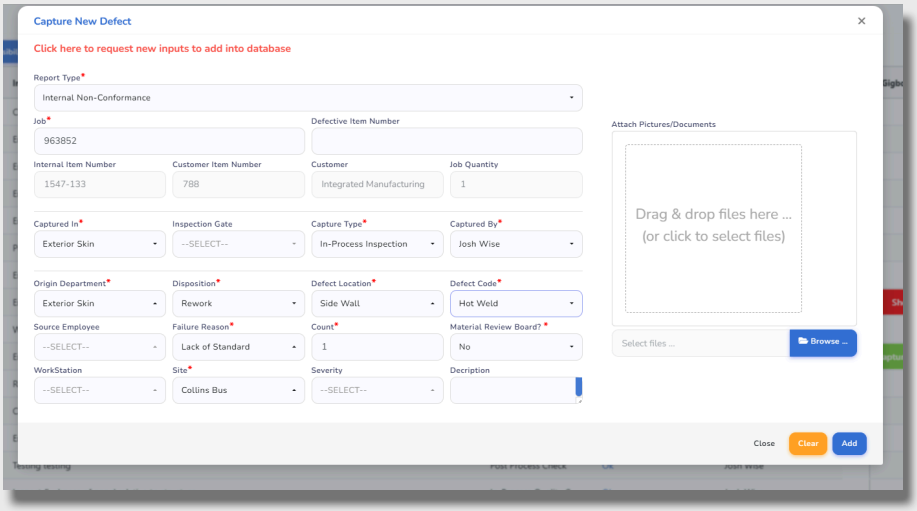
The loaded table displays a list of inspection items, with each row representing an item to review.

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

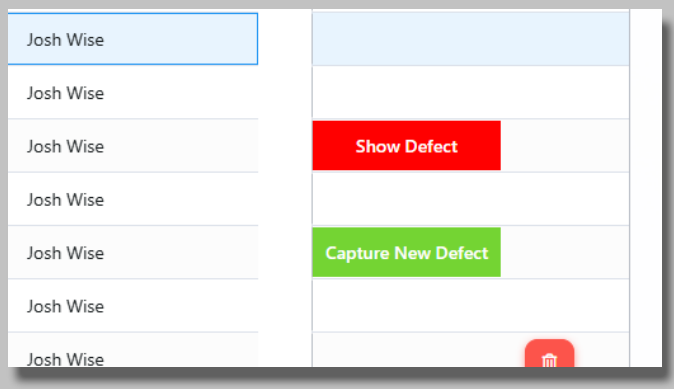
For any items marked as "**Defect**", a green "**Capture New Defect**" button will appear in the "**Gigbot Ticket**" column.

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



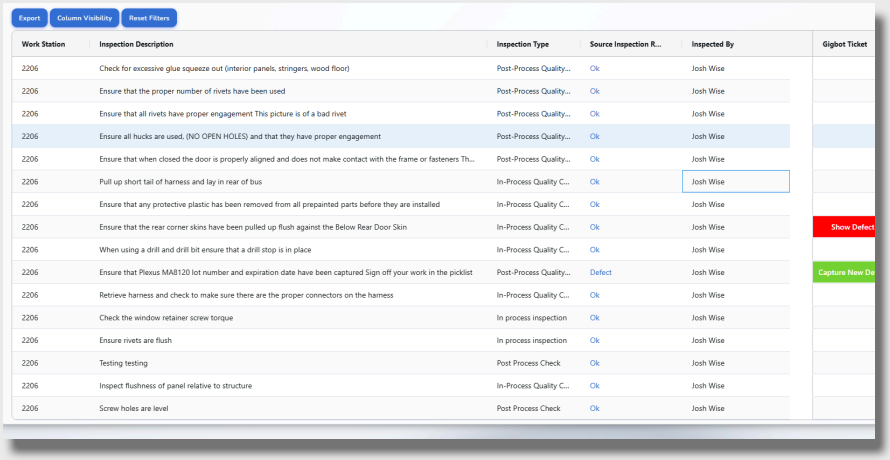
2. Fill out the defect details as outlined in the "**Freely Capturing Defects**" section.
    - Most fields will automatically populate, as the information is pulled directly from the checklist.
3. Click "**Add**" to save the defect. The popup will close, and the defect will be recorded.

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.



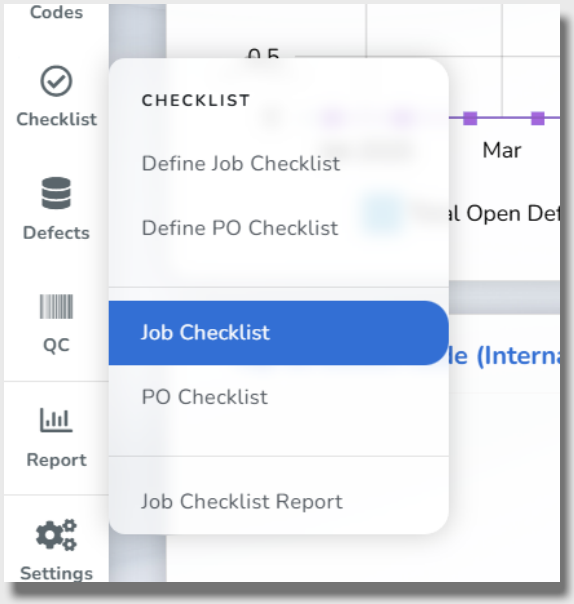
Completing the Checklist

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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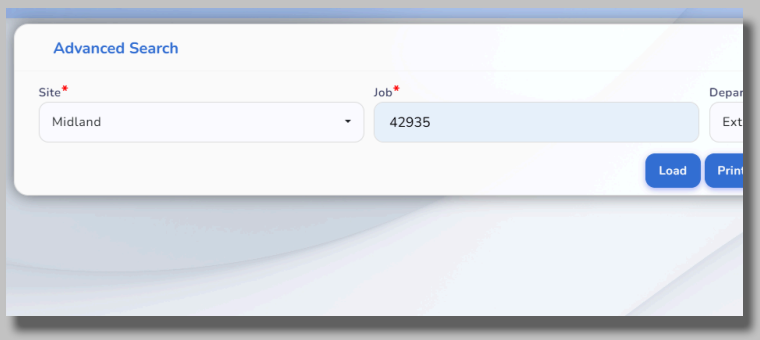
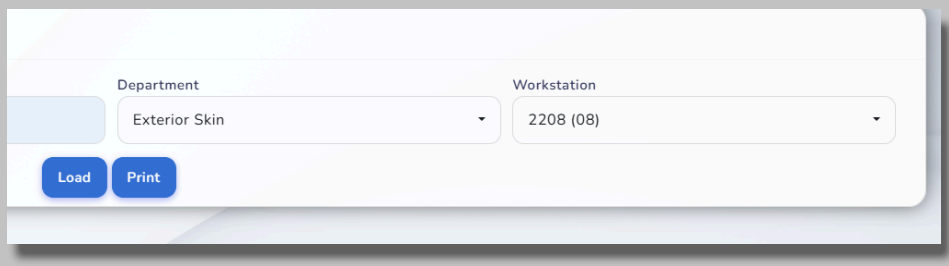
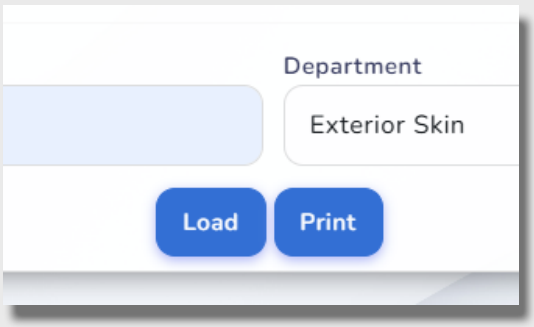




Locating the Checklist

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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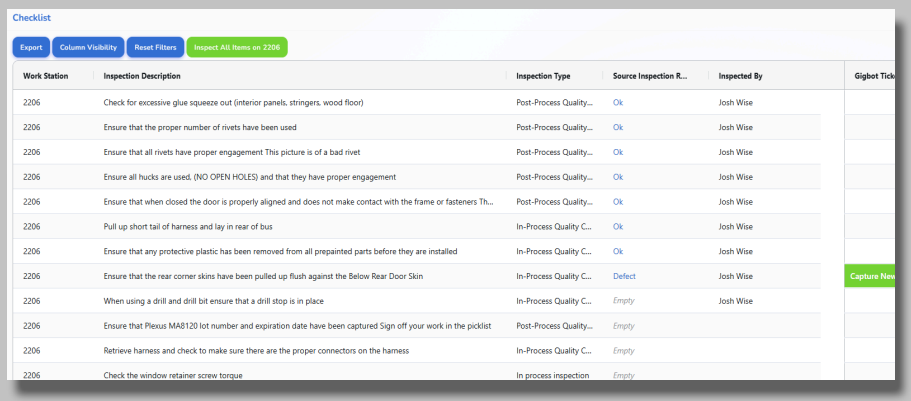

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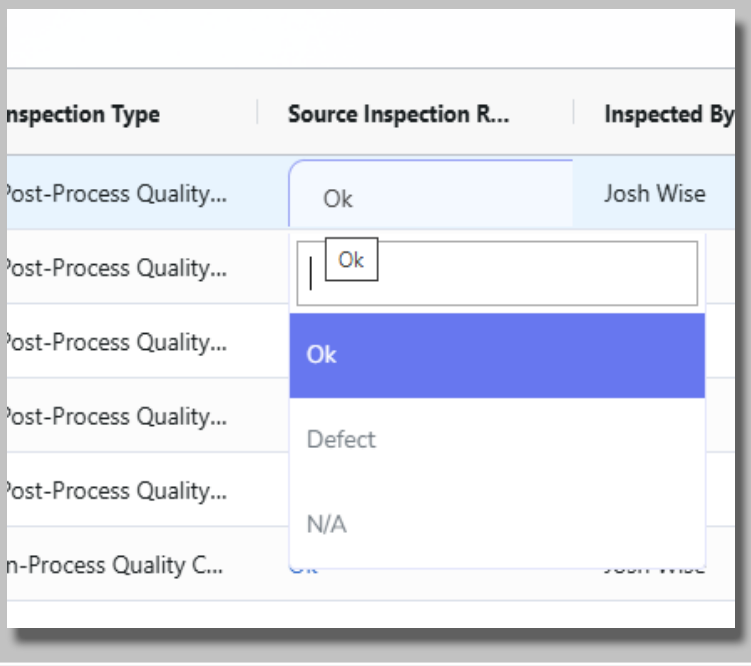

select:

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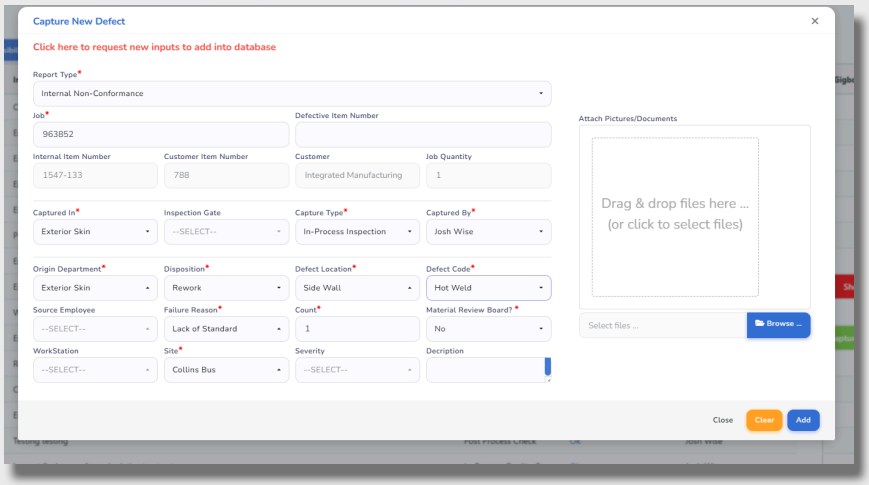
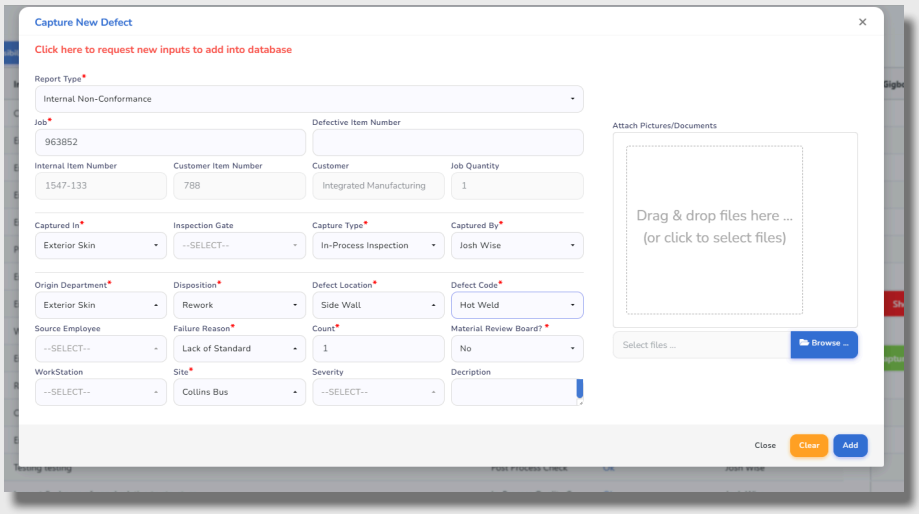
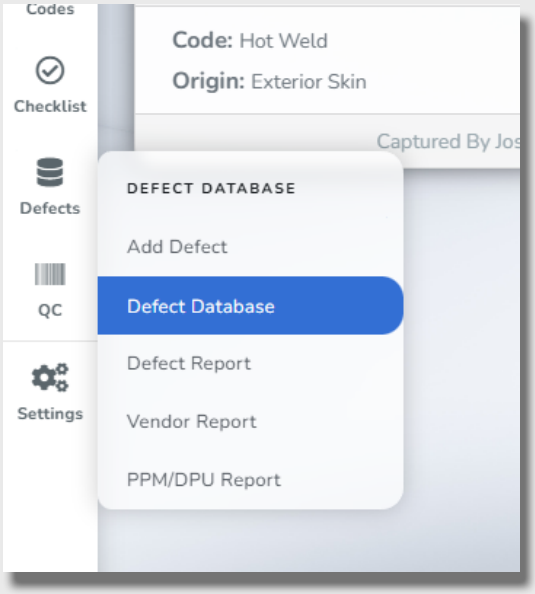




1. Click "**Add**" to save the defect. The popup will close, and the defect will be recorded.

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.



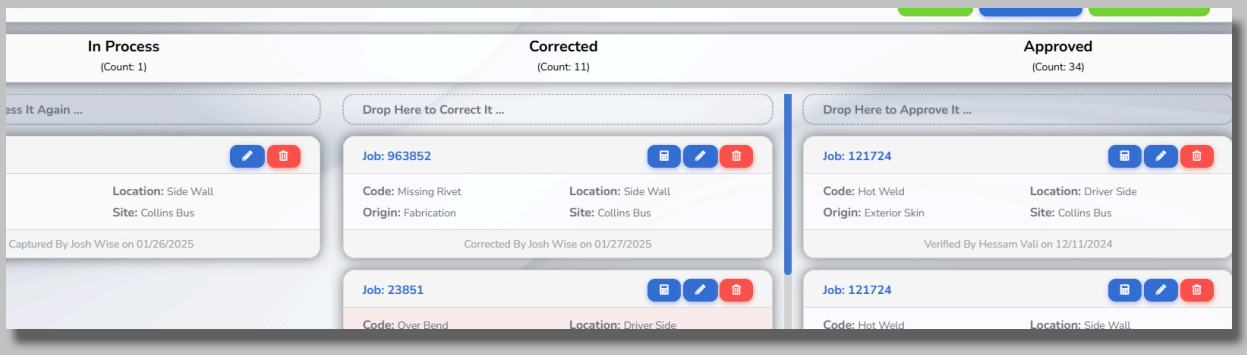
Access the Defect Database

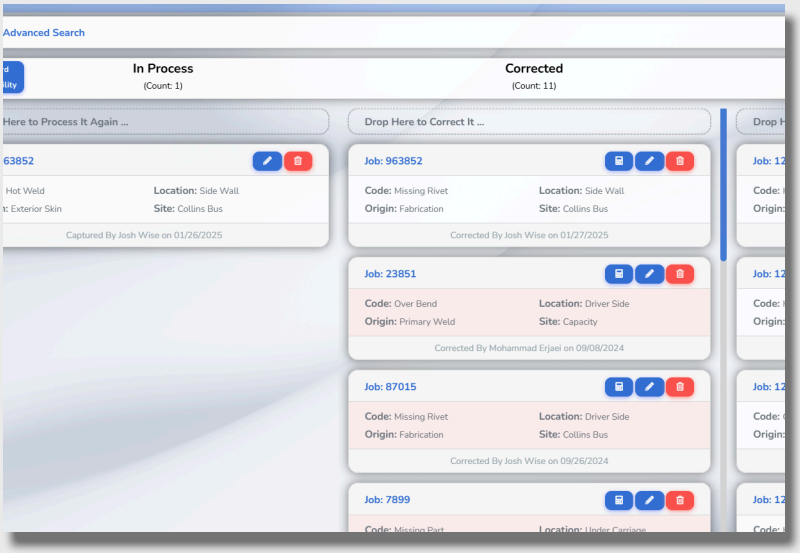
1. Hover over the "**Defects**" option on the left-hand menu and select "**Defect Database**" from the dropdown.

    - 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**



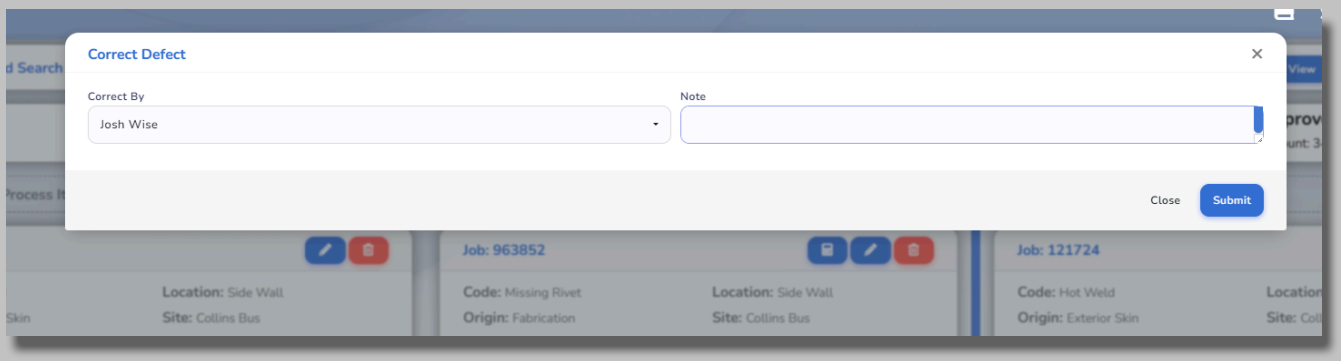


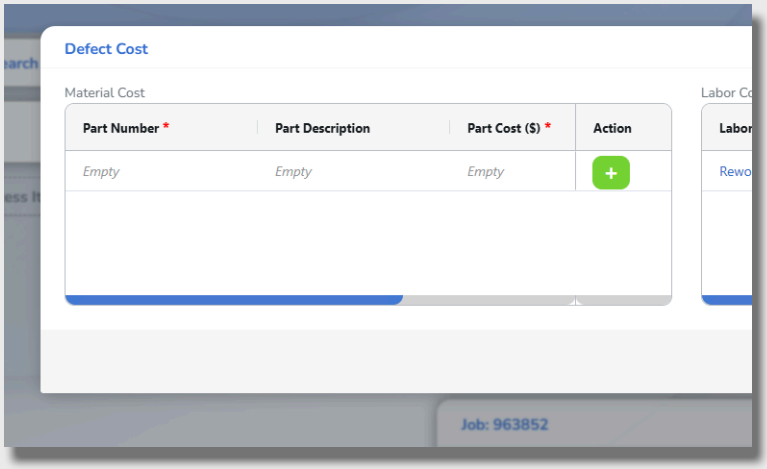
Marking a Defect as Corrected

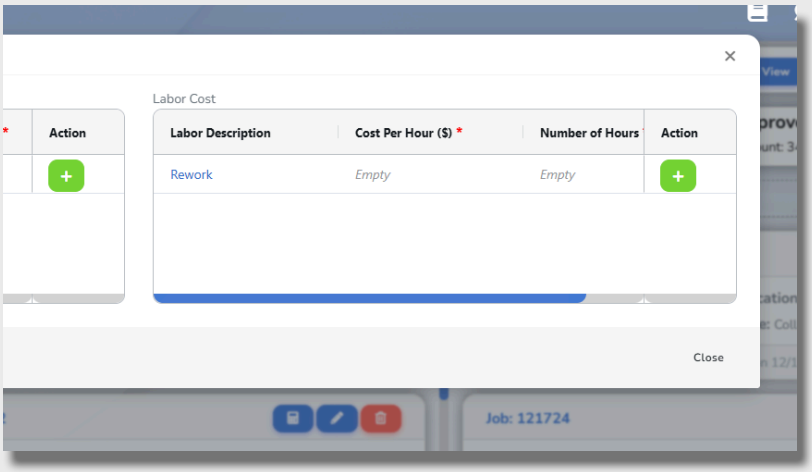
1. Locate the defect card in the "**In Process**" column.
2. Drag the card to the "**Corrected**" column.

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**".

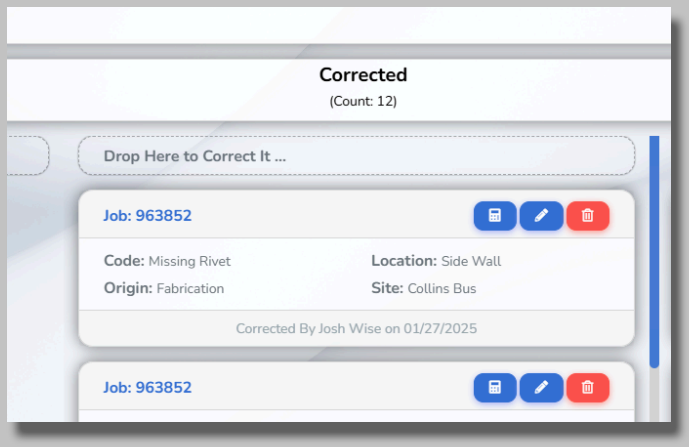






Capturing the Cost of Poor Quality (COPQ)

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. Gigbot can pull this data directly from your ERP, if enabled.
   - **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**".

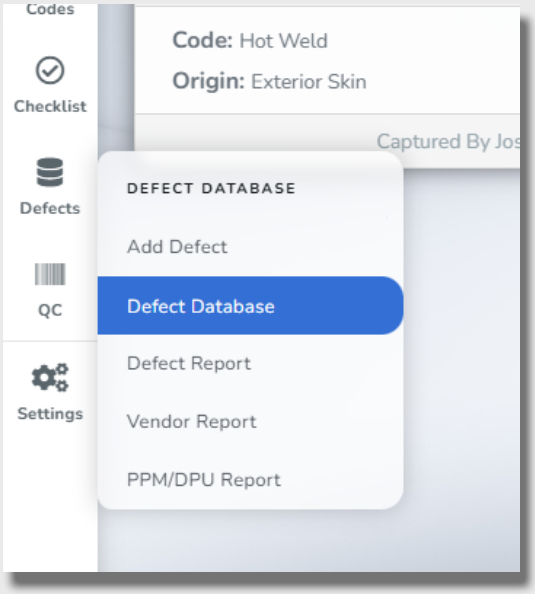


Completion

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

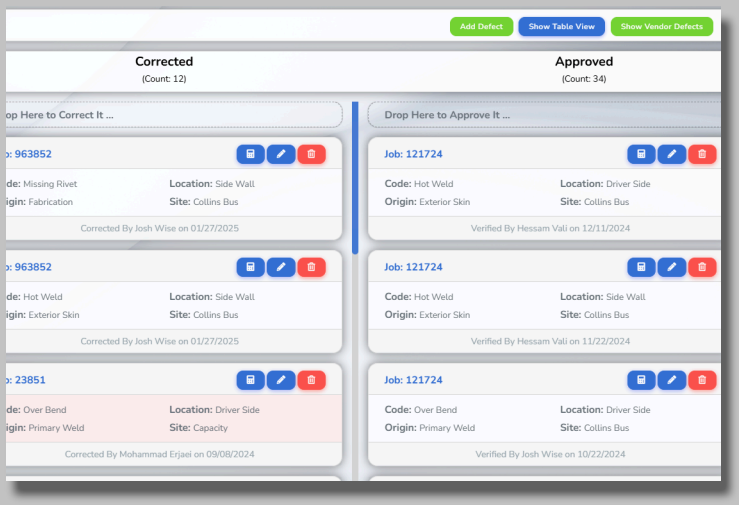
DEFECT MANAGEMENT: DEFECT VERIFICATION

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.



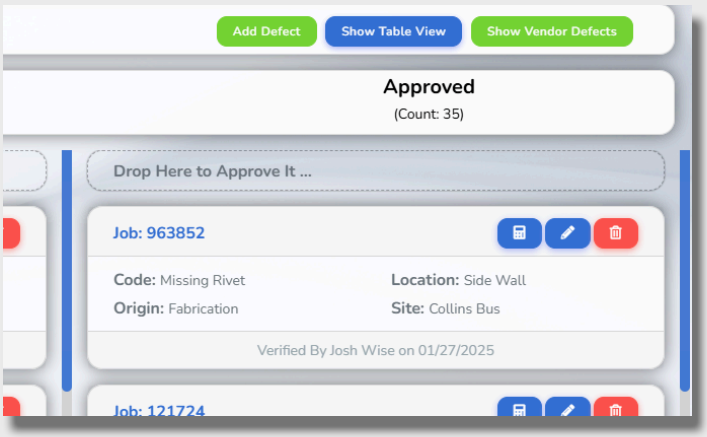
Access the Defect Database

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

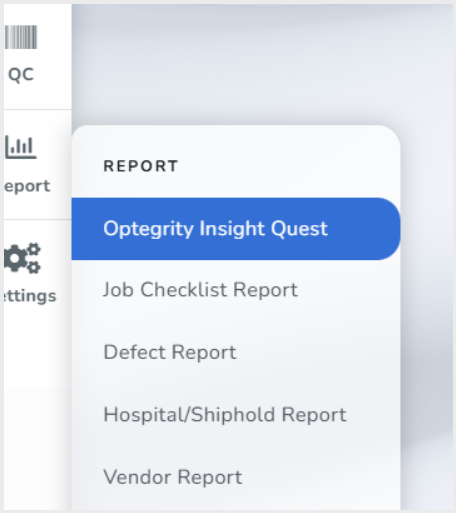
- Unlike defect correction, there is no popup to capture additional information during verification.
- Once the card is moved, the defect is officially verified, completing the defect management process.

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.

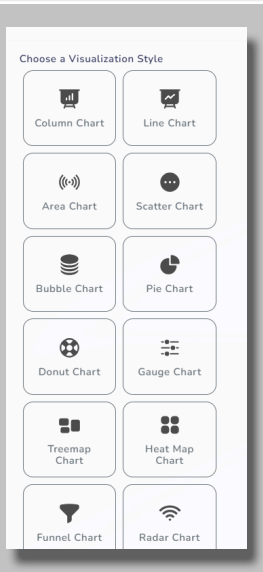
OPTEGRTIY INSIGHT QUEST

Optegrity Insight Quest uses AI to simplify reporting in Gigbot by allowing users to generate custom reports using plain-language prompts instead of complex filters. Users select a display type and describe what they want to see, and the system generates visual insights that reveal defect trends, quality performance, and cost impacts.

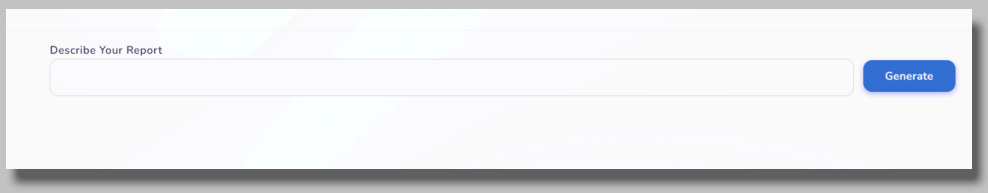


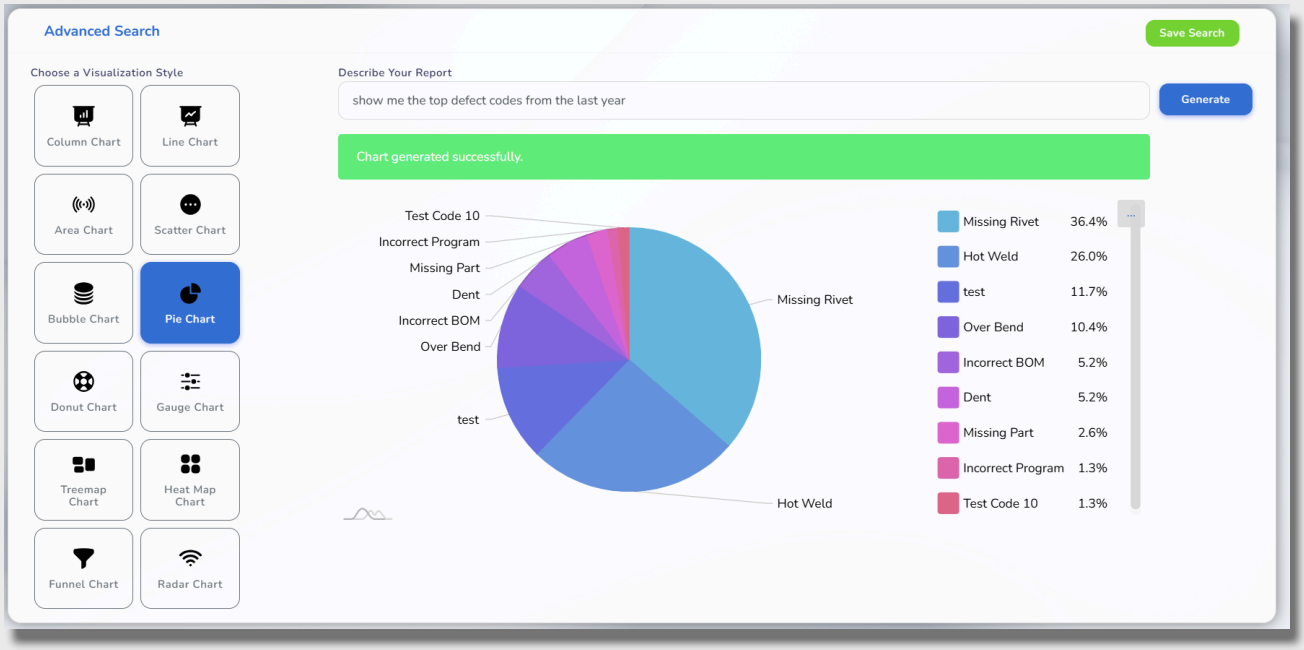
Accessing the Defect Report

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



- Select the desired chart type from the available display options.
- Describe the report in plain English using the text box, then click **"Generate"** to generate the chart.





PPM/DPU REPORT

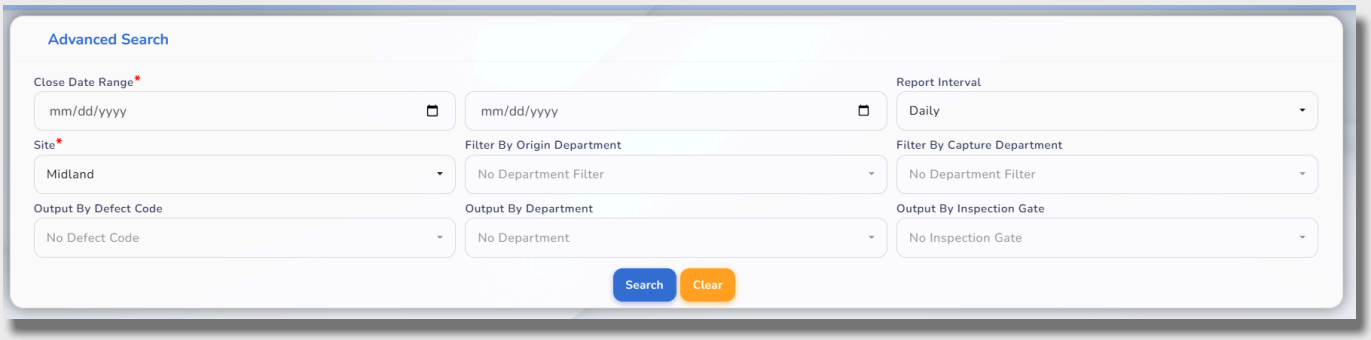
The PPM/DPU Report provides key quality performance metrics that help you understand defect rates relative to production volume. By analyzing Defect as either Parts Per Million (PPM) or Defects Per Unit (DPU), this report enables teams to track quality trends over time, compare performance across jobs or sites, and measure the effectiveness of improvement efforts.

Accessing the PPM/DPU Report

1. Hover over the "**Report**" menu on the left-hand side.
2. Click "**PPM/DPU Report**" from the dropdown menu.
3. This will take you to the **PPM/DPU** 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 mor information on search criteria, see field descriptions below)
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**".



Search Criteria

- **Close Date Range**: Filters the report to include only jobs that were marked as closed within the selected time frame.
- **Report Interval**: Determines how DPU or PPM values are calculated and displayed over time. Available options include Daily, Weekly, Monthly, Annually, or Custom.
    - **Custom** uses the full time frame selected in the Close Date Range as a single reporting interval.
- **Site**: Filters results to include only jobs associated with the selected manufacturing site.
- **Filter by Origin Department**: Limits results to defects originating from the selected department(s).
- **Filter by Capture Department**: Limits results to defects captured by the selected department(s).
- **Output by Defect Code**: Breaks out DPU or PPM results by the selected defect code(s), in addition to displaying the overall DPU or PPM for the report.
- **Output by Department**: Breaks out DPU or PPM results by the selected department(s), in addition to the overall DPU or PPM.
- **Output by Inspection Gate**: Breaks out DPU or PPM results by the selected inspection gate(s), in addition to the overall DPU or PPM.

PPM/DPU REPORT RESULTS

The results of the PPM/DPU Report are presented across several tabs, offering multiple ways to analyze defect rates, performance trends, and opportunities for improvement.

DPU/PPM Report Results - Table View

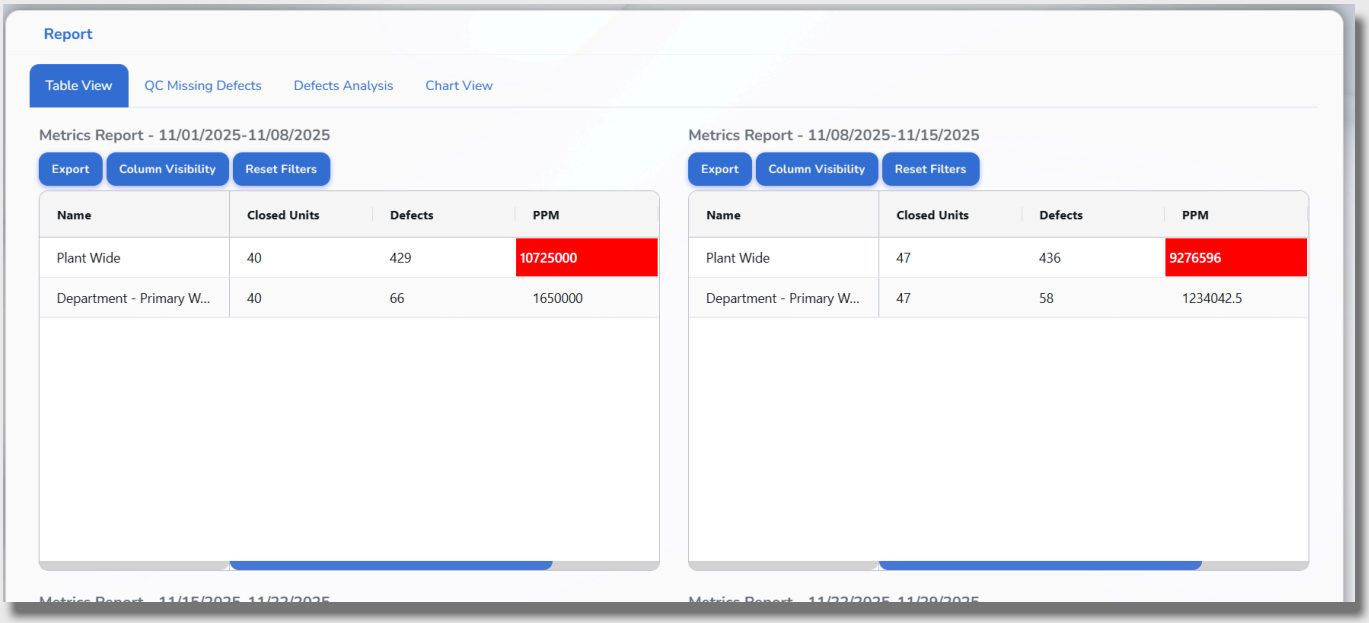
The **Table View** tab displays DPU or PPM results in a structured table format based on the selected report interval.

- A seperate table is generated for each reporting interval returned by the query

(daily, weekly, annually, or custom).

- Each table displays the **Plant Wide DPU or PPM** for the interval.
- If any **Output By** options were selected (Defect Code, Department, or Inspection Gate), additional columns are included to break out DPU or PPM for each selected value.
- If **Goal DPU** values have been defined, any DPU results that exceed the goal are automatically highlighted with a red background to quickly draw attention to areas that are out tolerance.

This view is ideal for comparing quality performance across time periods and quickly identifying intervals that require further investigation.

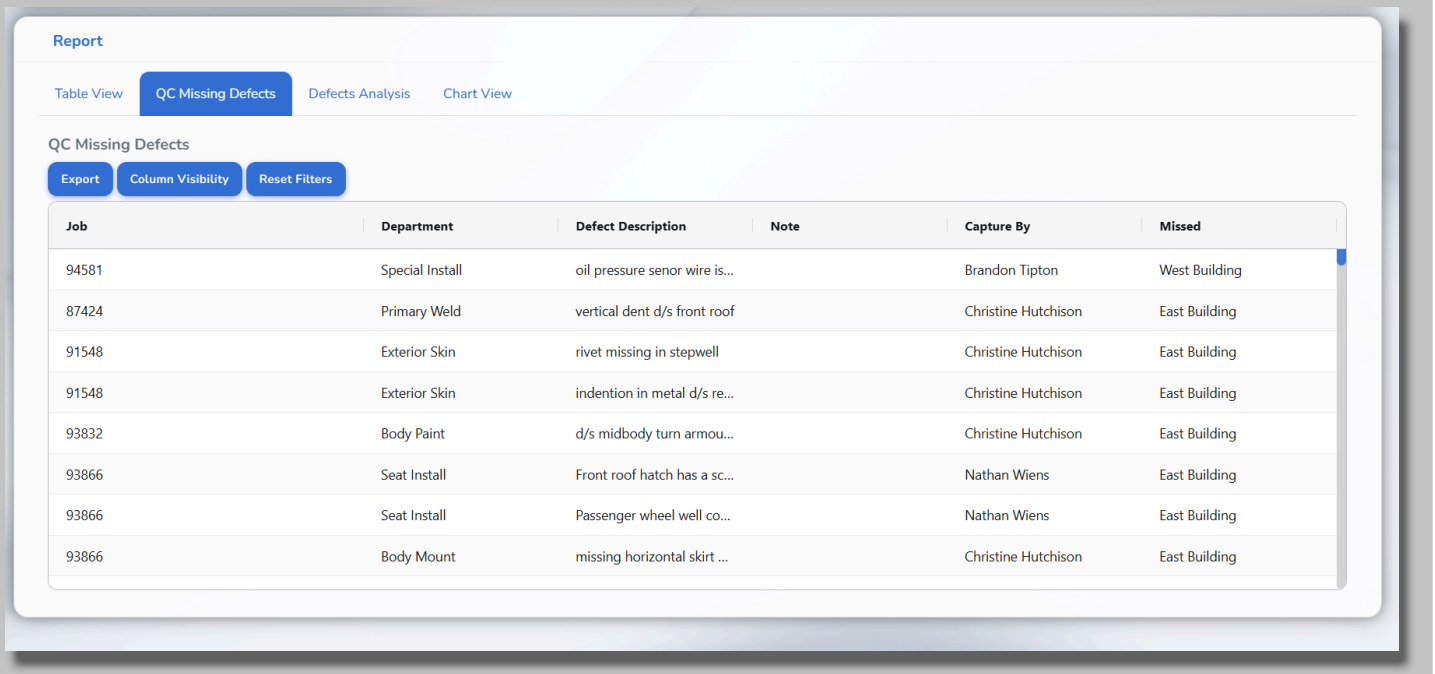


DPU/PPM Report Results – QC Missing Defects

The QC Missing Defects tab highlights defects that were captured downstream but were not detected at earlier quality control (QC) inspection gates.

- This view displays a list of defects that passed through one or more QC gates without being identified.

This report is especially useful for strengthening inspection strategies and preventing defects from progressing further into production.

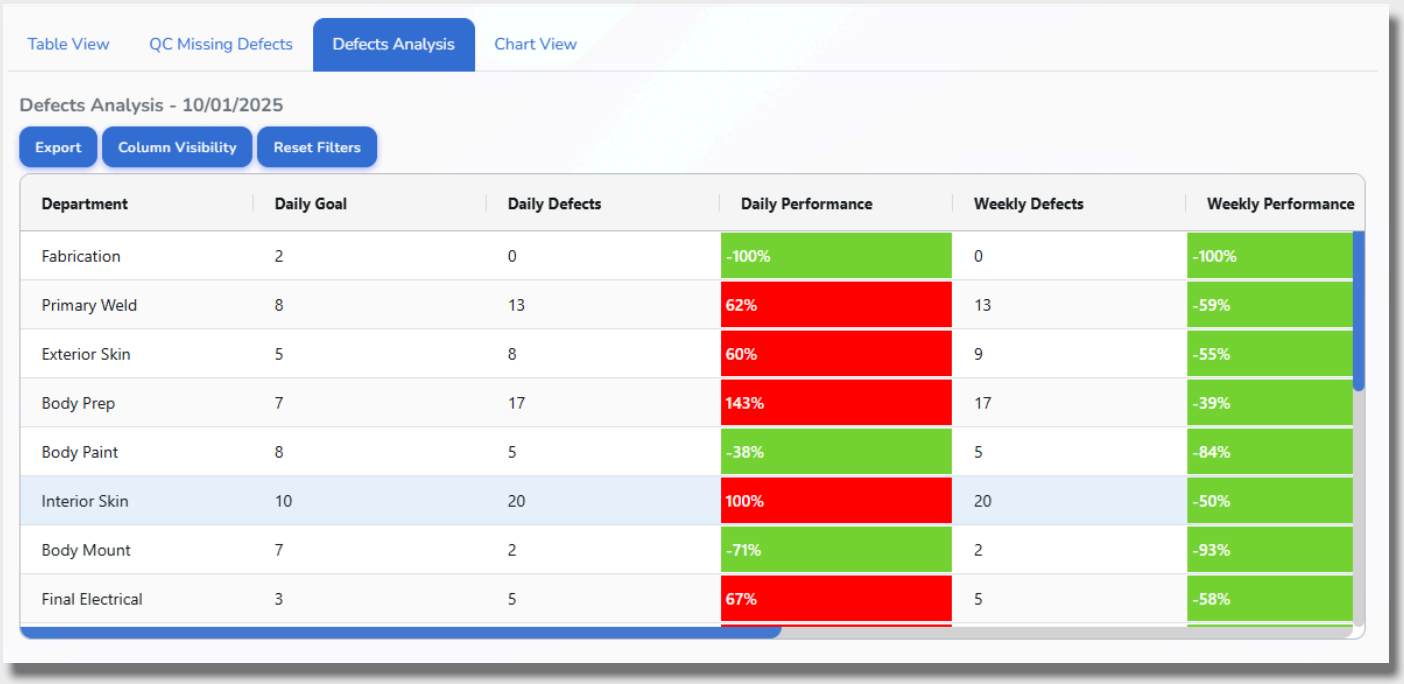


DPU/PPM Report Results – Defect Analysis

The Defect Analysis tab provides a high-level view of defect performance across all departments in the plant.

- This view lists every department and summarizes their defect performance over time.
- The analysis begins at the start of the date range defined in the report search criteria.
- Each department's DPU is displayed in relation to its defined goal across multiple timeframes, including:
  - Last Week
  - Last Month
  - Last Year

Goal-based visual indicators make it easy to identify departments that are meeting expectations versus those that may require additional attention.



Department	Daily Goal	Daily Defects	Daily Performance	Weekly Defects	Weekly Performance
Fabrication	2	0	-100%	0	-100%
Primary Weld	8	13	62%	13	-59%
Exterior Skin	5	8	60%	9	-55%
Body Prep	7	17	143%	17	-39%
Body Paint	8	5	-38%	5	-84%
Interior Skin	10	20	100%	20	-50%
Body Mount	7	2	-71%	2	-93%
Final Electrical	3	5	67%	5	-58%

DPU / PPM Report Results – Chart View

The Chart View tab provides a visual representation of DPU or PPM performance over the selected time frame.

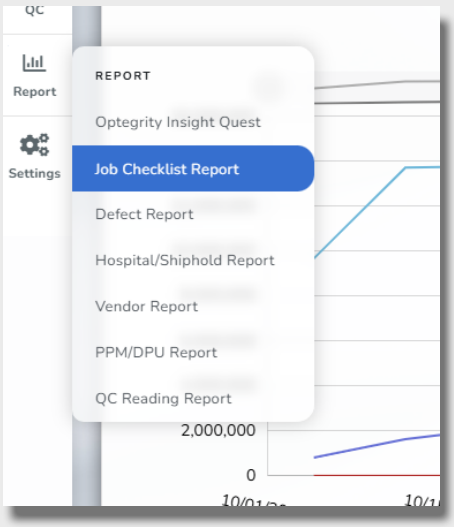
This view displays DPU or PPM values plotted across the report interval defined in the search criteria.

- The chart makes it easy to identify trends, spikes, and improvement patterns over time.
- When combined with goal thresholds, this view helps teams quickly see whether quality performance is improving, stable, or trending out of control.

The Chart View is especially useful for presentations, reviews, and ongoing monitoring of quality performance at a glance.

JOB CHECKLIST REPORT

This report allows users to analyze checklist execution and inspection results for specific jobs or units. By filtering by job number, department, or date range, teams can review inspection activity and aggregated checklist data to better understand inspection effectiveness and quality trends.

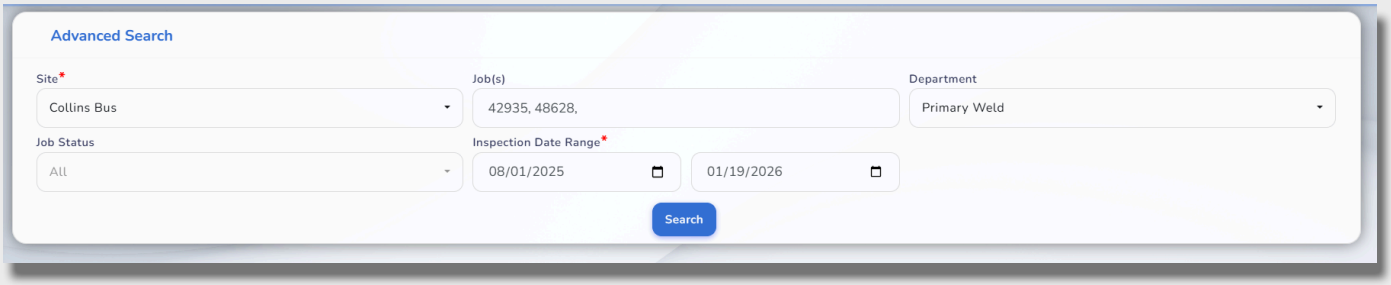


Accessing the Job Checklist Report

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

Using the Advanced Search

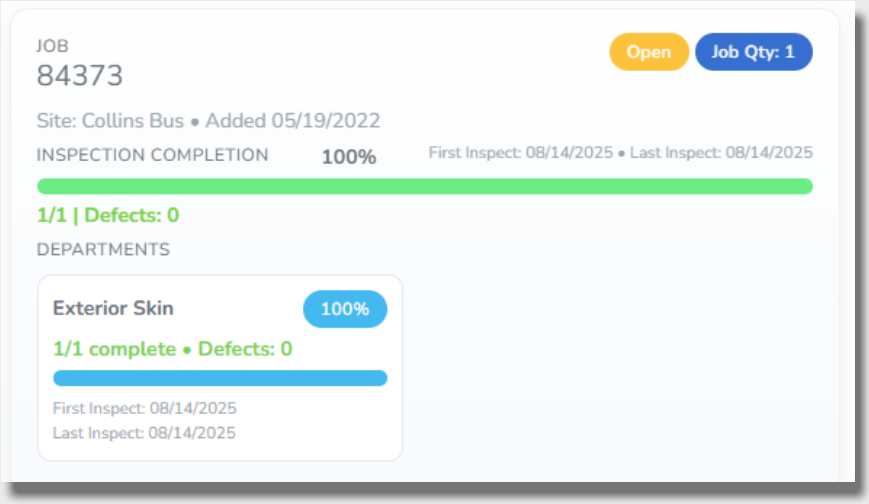
1. At the top of the screen, you'll find the "**Advanced Search**" area.
2. Enter your search criteria into the relevant fields. Any fields related to defect details can be used to refine your search. (For mor information on search criteria, see field descriptions below)
3. Once your criteria are set, click "Search" to view the matching data.
4. To view all defect data, leave all fields blank and click "**Search**".



- **Site**: Filters results to inspections performed at the selected manufacturing site.
- **Job(s)**: Allows users to enter one or more job or unit numbers to search for specific jobs. Multiple job numbers can be entered and separated by commas.
- **Department**: Filters results by the department where the inspection or checklist activity occurred.
- **Job Status**: Filters jobs based on their current status. Options include Open, Closed, or Both.
- **Inspection Date Range**: Filters results to include only inspections that were performed within the selected date range.

JOB CHECKLIST REPORT RESULTS

The Job Checklist Report results are organized by job or unit, with each job displayed as its own card. Each card summarizes the total number of inspections completed for that unit, along with the total number of defects identified. This same inspection and defect data is then broken down by department, providing additional insight into where inspections occurred and where defects were found.



Job Checklist Report – Card Overview

Each job or unit in the Job Checklist Report is displayed as an individual card that summarizes inspection activity and defect data.

Unit Information

The top section of the card displays key details about the unit, including:

- Site where the unit was produced
- Date Added to the system
- Job Status, indicating whether the unit is Open, Closed, or in Hospital status

Department Breakdown

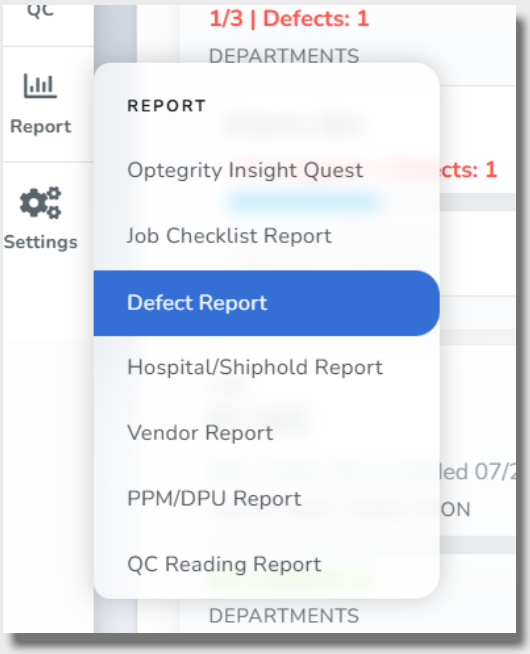
Below the unit information, the card displays a breakdown of each department that performed one or more checklists on the unit.

- Each department entry shows inspection activity and defect information specific to that department.
- Clicking on a department opens the Defect Database in a new tab, automatically filtered to display only the defects associated with that unit.

This card-based layout allows users to quickly review inspection coverage, drill into department-level results, and investigate defects without leaving the report.

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:

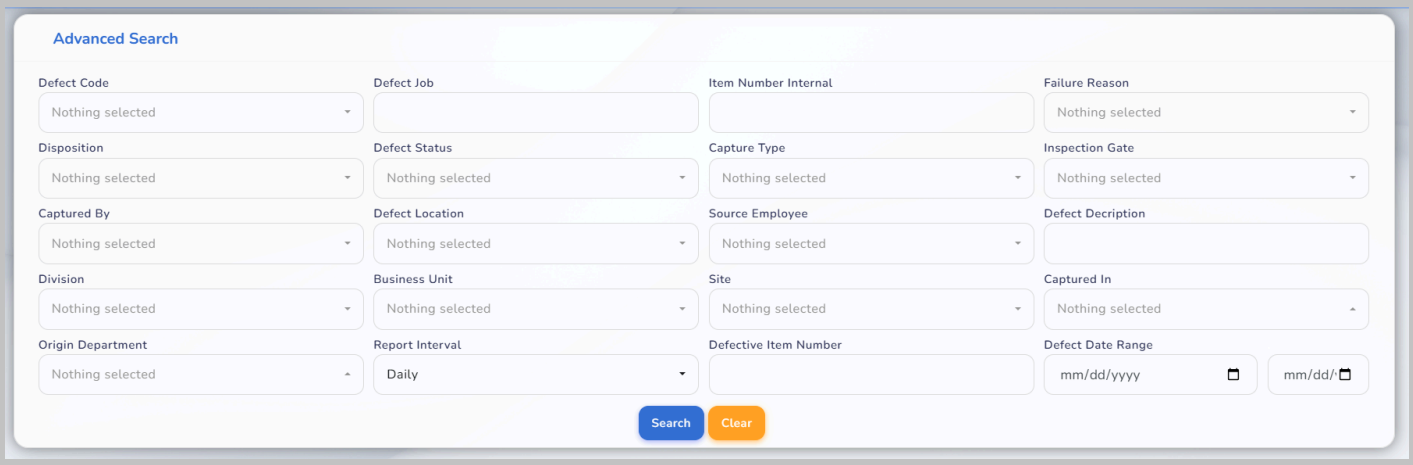


Accessing the Defect Report

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.

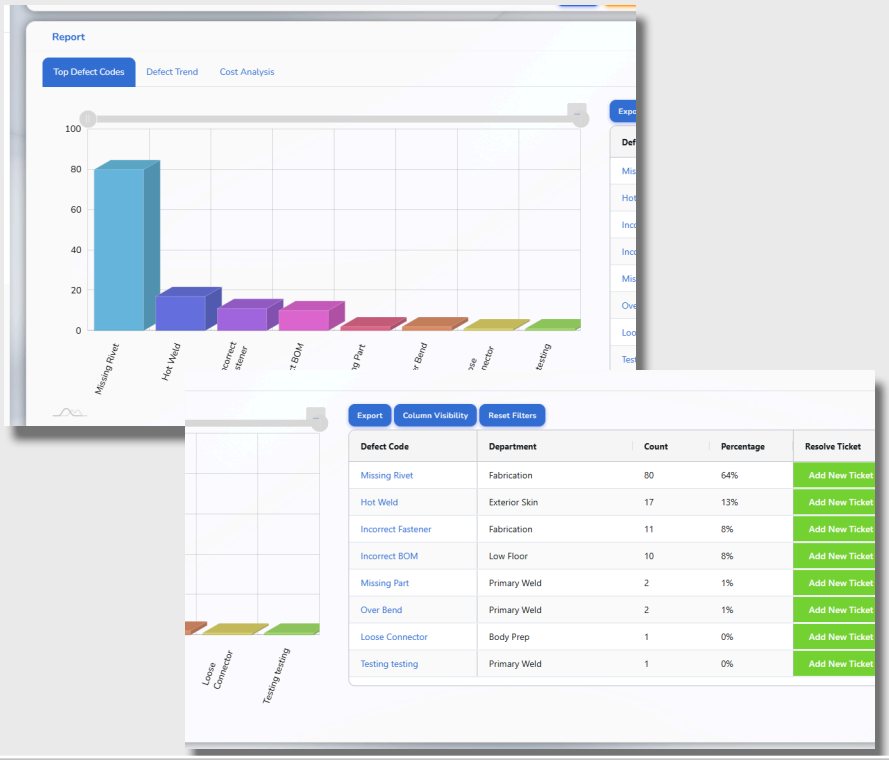
• For a complete explanation of these fields, refer to the **Defect Capture Method 1** section.

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**".

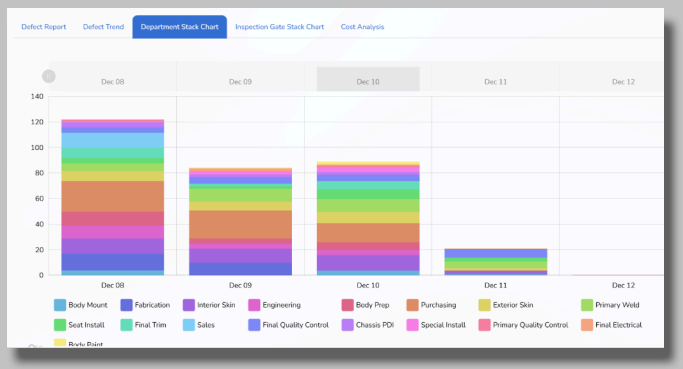
DEFECT REPORT RESULTS

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



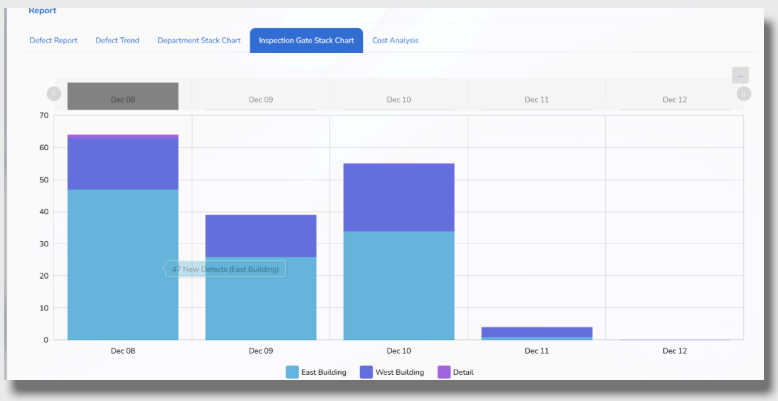
Top Defect Codes

- 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.



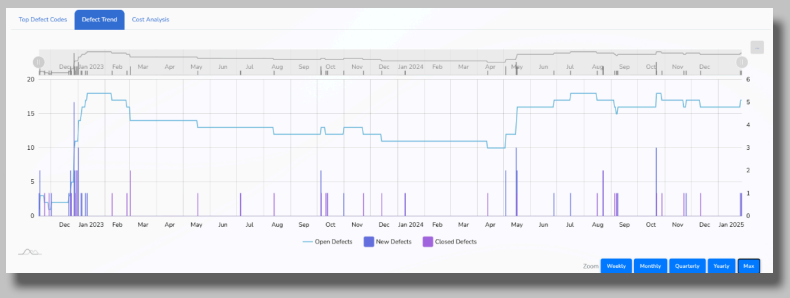
Department Stack Chart

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



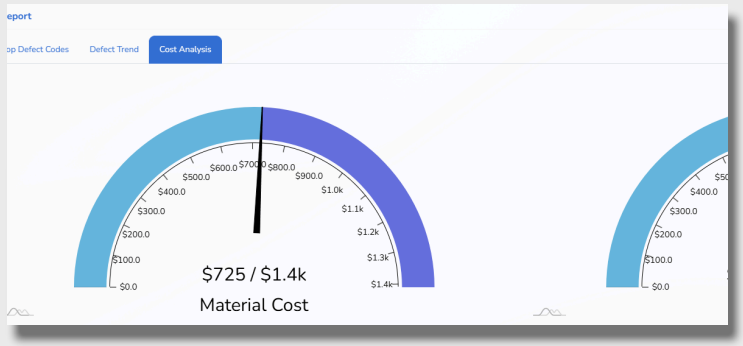
Inspection Gate Stack Chart

- 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.