RESOLVE QUICKSTART GUIDE

In any manufacturing environment, issues and process breakdowns are inevitable. However, without a structured system to track, manage, and resolve them, they can lead to costly downtime, inefficiencies, and recurring problems.

That's where **Resolve** comes in. **Resolve** is a powerful issue management system designed to help teams capture, analyze, and eliminate production issues efficiently. With an intuitive interface, real-time tracking, and a structured workflow, Resolve ensures that every issue is properly documented and followed through to closure.

Whether you are a quality manager, engineer, supervisor, or continuous improvement professional, Resolve provides the tools to identify trends, reduce repetitive issues, and drive corrective actions. This guide will walk you through the key features of **Resolve** to help you get started quickly and make the most of its capabilities.

WHAT'S INSIDE

- KEY CONCEPTS AND TERMS
- VISUAL TOUR
- DASHBOARDS
- ISSUE MANAGEMENT WORK FLOW
- REPORTING

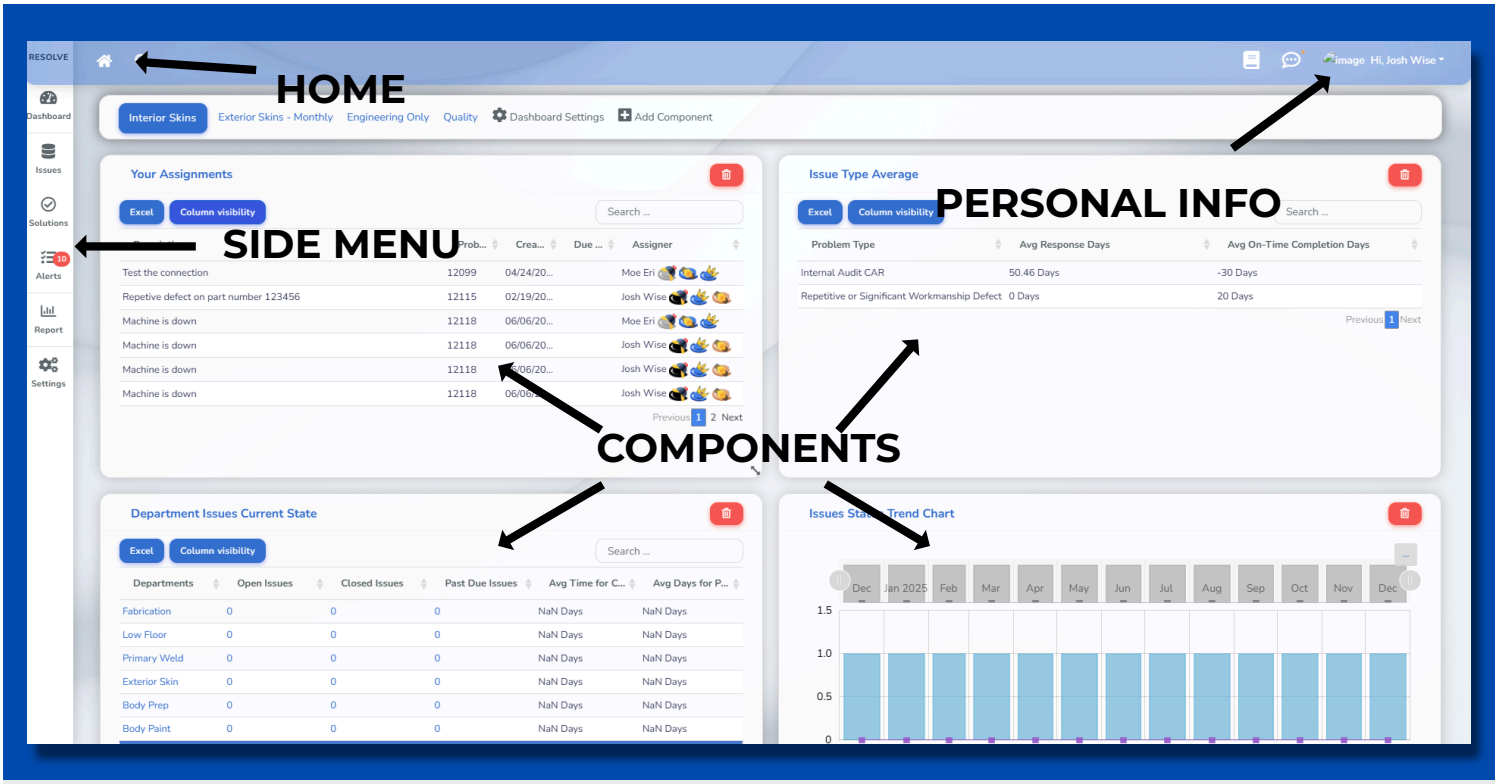
KEY CONCEPTS AND TERMS

- **Assigned User** – The individual or team responsible for handling and resolving an issue.
- **Containment** – Immediate actions taken to control an issue before a permanent solution is found.
- **Corrective Action** – Steps taken to resolve an issue and prevent it from recurring.

- **Dashboard** – A customizable interface displaying key metrics and active issues.
- **Escalation** – The process of moving an issue up the chain of command for resolution.
- **Issue** – A problem, defect, or process breakdown that needs attention.
- **Issue Database** – The centralized location where all captured issues are stored, tracked, and managed.
- **Preventive Action** – Measures put in place to stop an issue from occurring in the first place.
- **Reports** & **Analytics** – Data-driven insights into issue trends, resolution times, and performance metrics.
- **Root Cause Analysis** (RCA) – A structured method used to identify the underlying cause of an issue.
- **Workflows** – Predefined steps an issue follows from capture to closure.

DASHBOARDS

Resolve's dashboard is your central hub for tracking issues and monitoring key performance metrics. It provides real-time visibility into active issues, resolutions, and trends, ensuring that your team stays informed and proactive. Dashboards can be customized to display the most relevant information for your role, enabling quick decision-making and a streamlined issue resolution process.



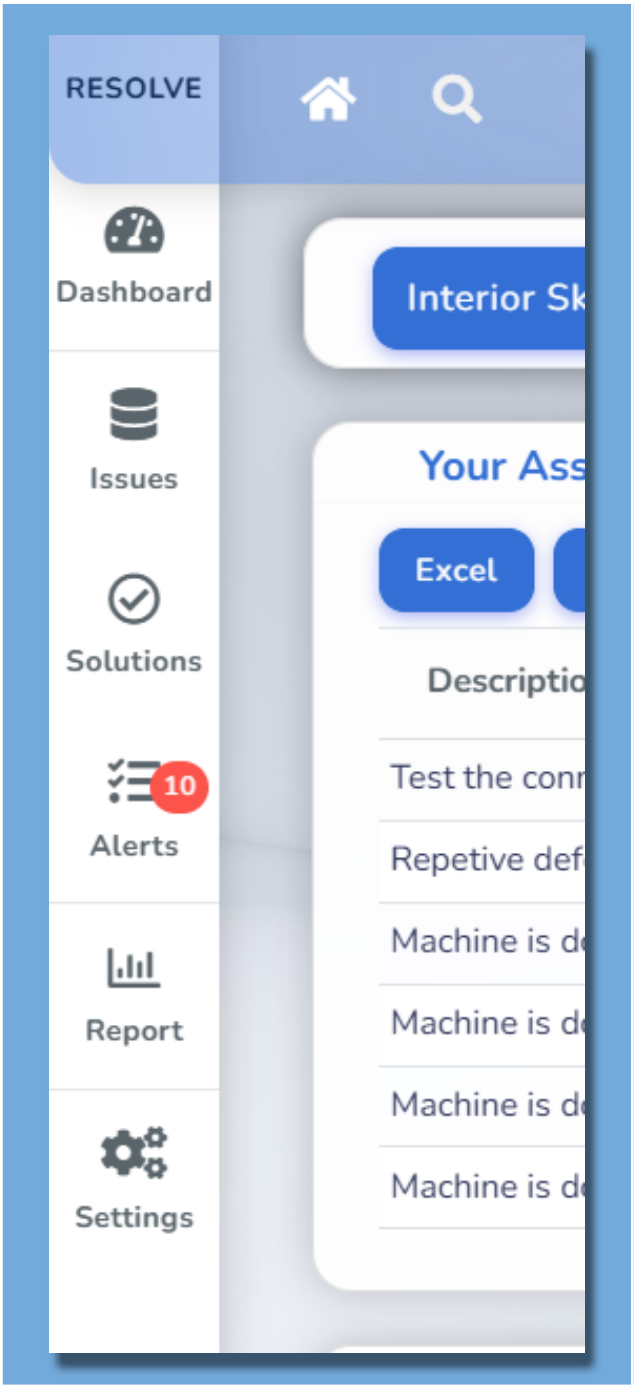
Home - This button takes you to your Optegrity home page, where you can access other Optegrity applications, view global settings, and update your user profile.

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 – This button takes you back to the main dashboards.

Issues – This drop-down menu allows you to go to either the issue database or add a new issue.

Solutions – This takes you to the solutions database.

Alerts – This will take you to a table showing you what issues and solutions you own and have assigned to others.

Report – This will take you to the reporting section.

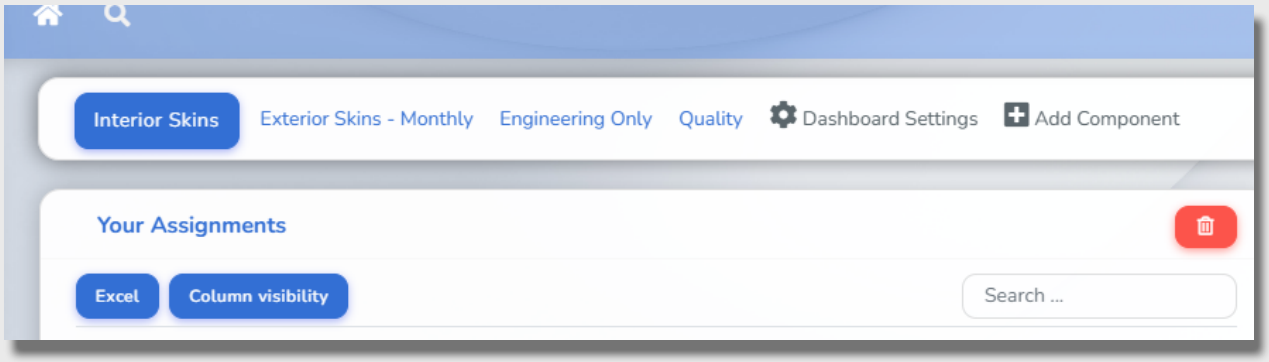
Settings – This will open the application settings.

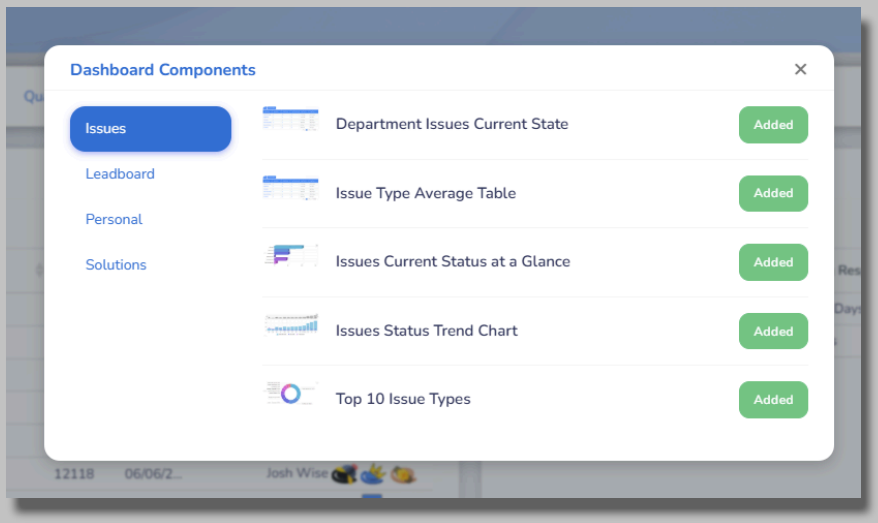
CREATING AND EDITING DASHBOARDS

Resolce 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.

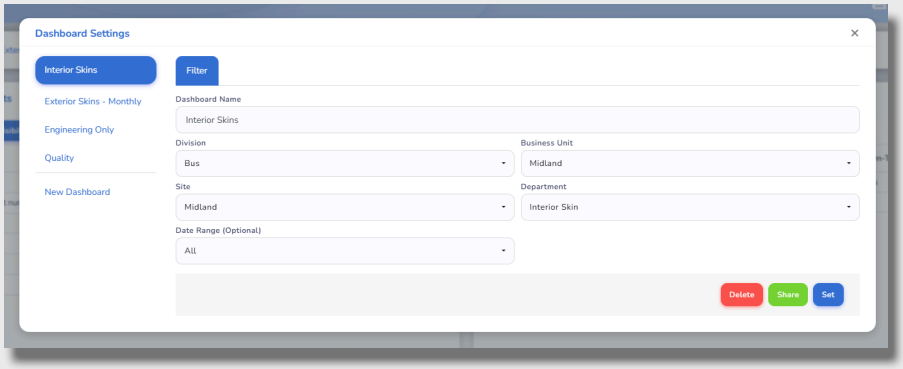




Add a Component to a Dashboard

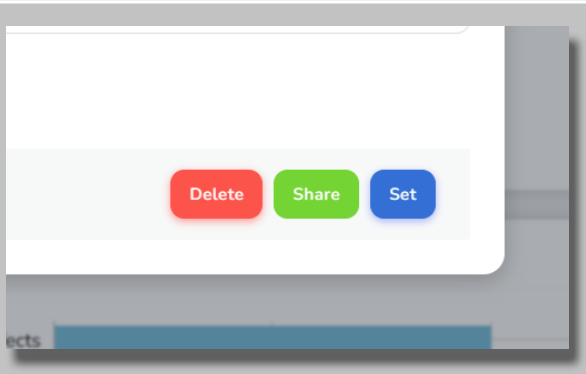
1. Click the "**Add Component**" button to bring up the component selector screen.
2. Browse the list to find the component you want to add, then click "**Add**" to place it on your dashboard.

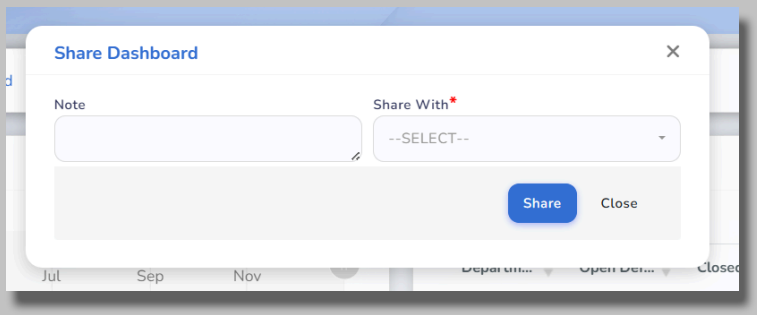
Edit an Existing Dashboard



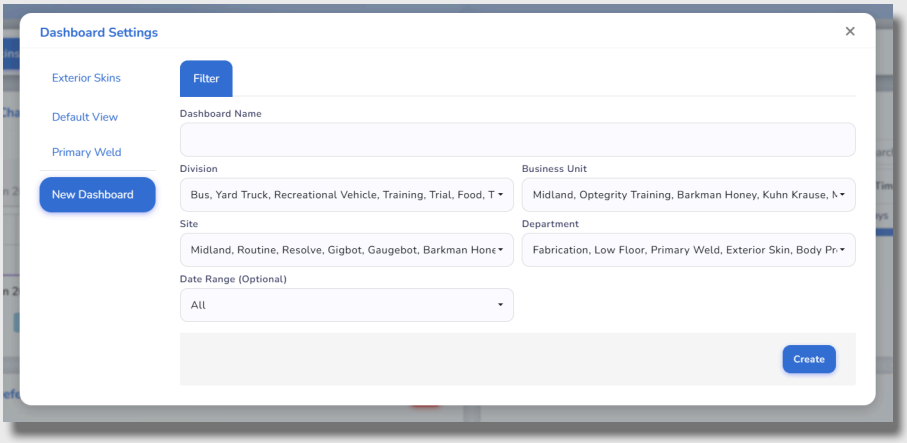
1. Click the "**Dashboard Settings**" button to open the settings popup.
2. From the list on the left-hand side, select the dashboard you want to edit.
3. Adjust the scope of data by choosing from the **Division**, **Business Unit**, **Site**, and **Department** dropdowns.

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.

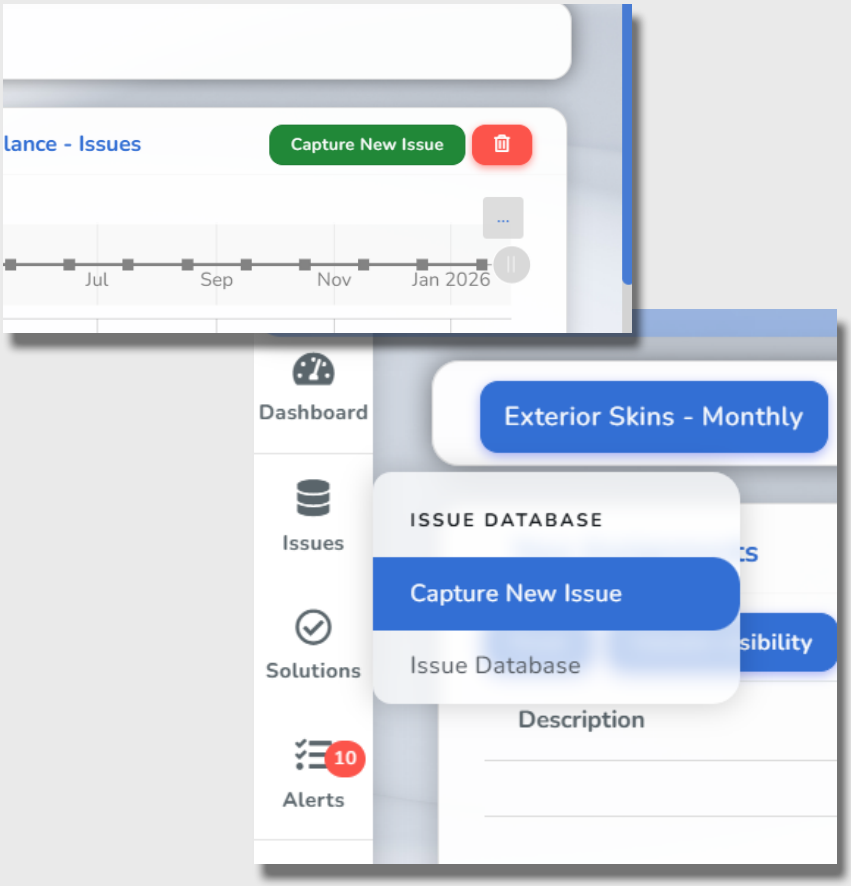
ISSUE MANAGEMENT

Effective issue management is crucial for maintaining quality and efficiency in manufacturing. Resolve provides a structured approach that guides issues through key stages, ensuring they are properly addressed:

- **Capture** – Recording the issue to ensure it is logged and tracked.
- **Assignment** – Designating the right personnel to handle the issue.
- **Containment** – Implementing immediate actions to control the issue before a permanent solution is found.
- **Root Cause Analysis** – Investigating and identifying the underlying cause of the issue.
- **Solution Management** – Developing and implementing corrective actions to resolve the issue.
- **Closure** – Ensuring the issue has been fully resolved and will not recur.

ISSUE CAPTURE

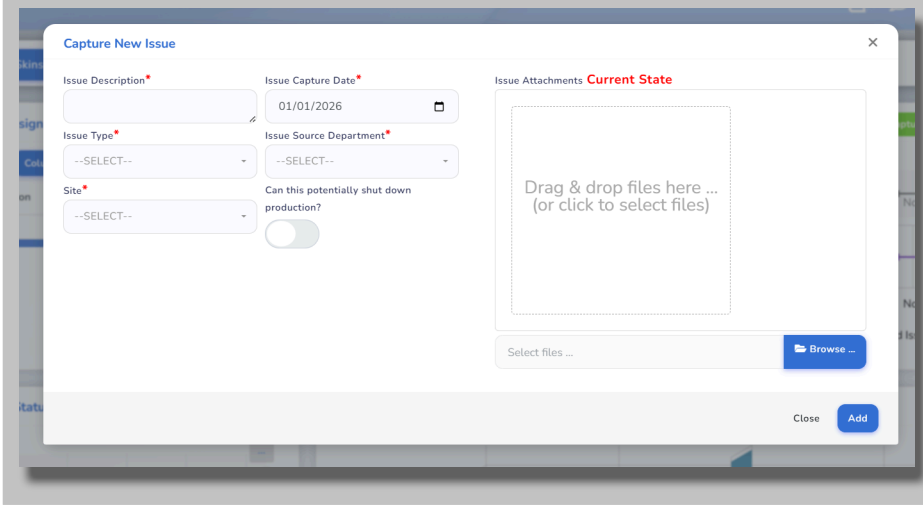
Capturing an issue is the first step in the issue management process. Resolve allows users to log issues quickly and efficiently, ensuring that all necessary details are documented for proper tracking and resolution.



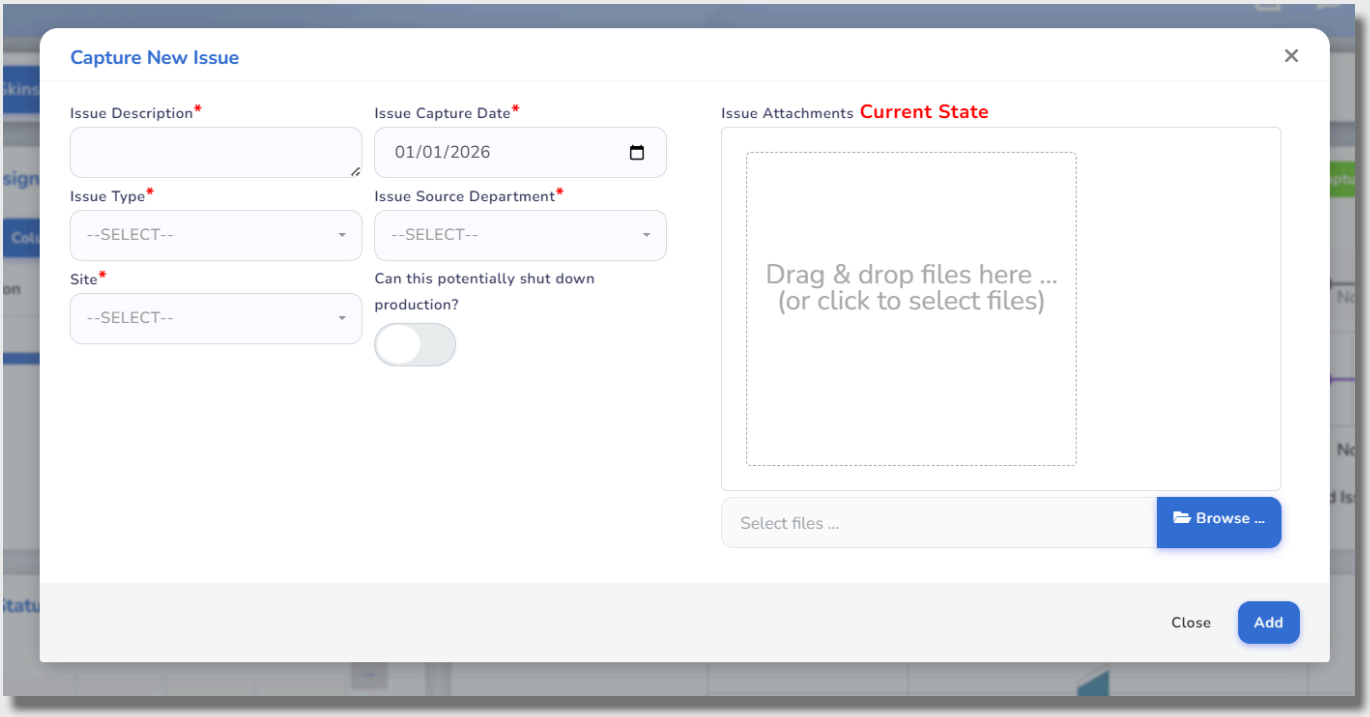
Accessing the "Issue Capture Screen"

There are two ways to bring up the **"Issue Capture Screen"**:

- Click the "**Capture New Issue**" button directly on the dashboard inside the **"My Current Performance at a Glance - Issues"** component.
- Hover over the **"Issues"** icon on the side menu and select **"Capture New Issue"** from the dropdown menu.



Once the **"Issue Capture Screen"** appears, you'll begin by entering the initial issue details:



Issue Description - This will serve as the issue's title

Issue Capture Date - Auto-populates with today's date.

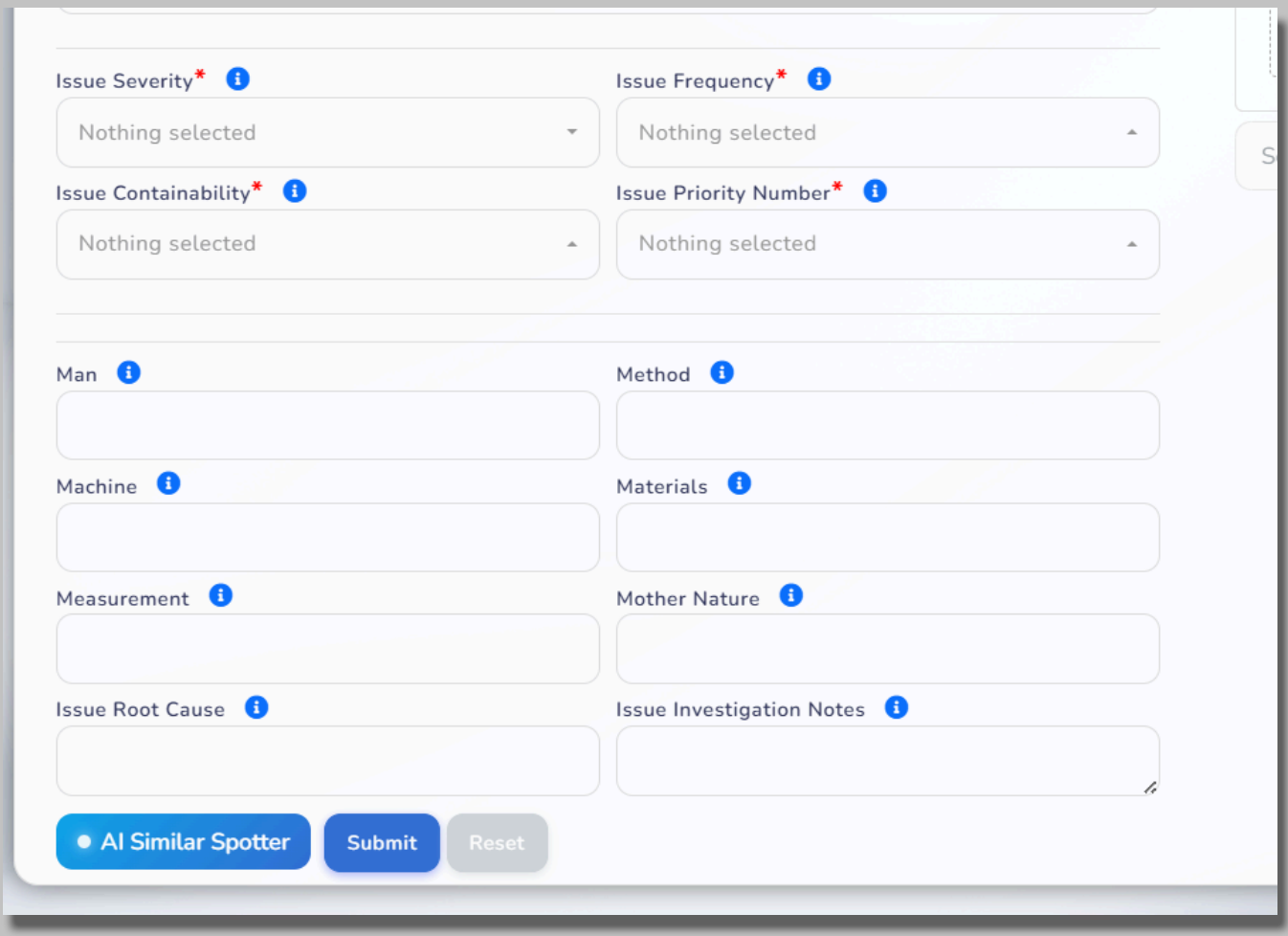
Issue Type - Choose the appropriate type of issue. Each issue has a workflow specific to your organization. Selecting an issue type may reveal additional fields.

Issue Source Department - The department responsible for the issue. The department supervisor is the default issue owner. If assignment is enabled for this issue type, the department's manager will have the option to approve the capture and assign it.

Site – Defaults to your only site if applicable; otherwise, select from the dropdown.

Can this potentially shut down production? – Toggle this if the issue could result in a plant shutdown.

Issue Attachments – Add images, documents, or other relevant files to support the issue documentation. in the issue management process.



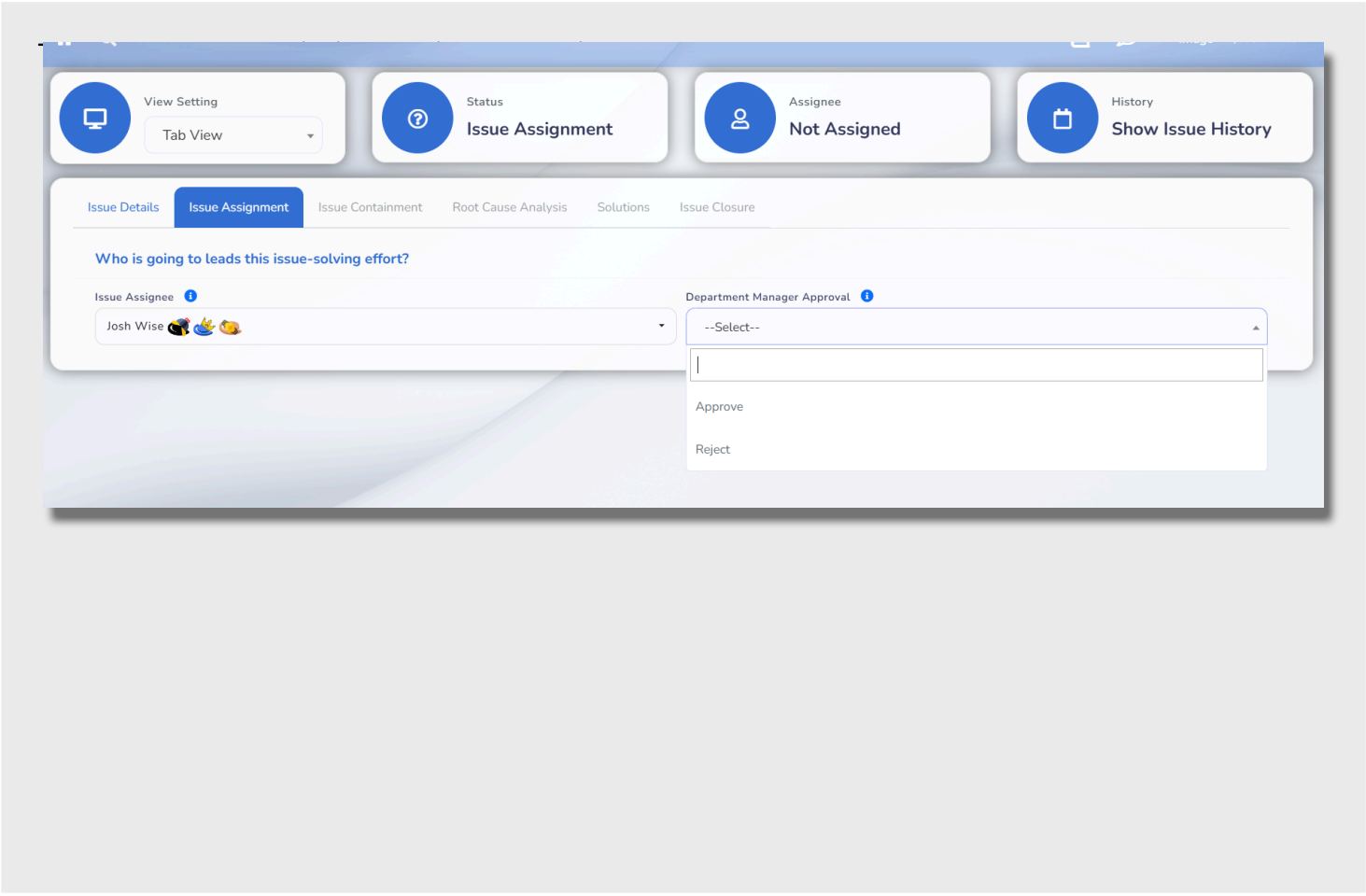
Depending on the selected issue type, additional fields may appear:

- **Issue Severity** – A dropdown where users select the severity of the issue. Higher severity levels indicate higher urgency, and the available options are defined by your organization.
- **Issue Frequency** – Similar to severity, this dropdown captures how often the issue occurs.
- **Issue Containability** – A dropdown for assessing how easily the issue can be contained.
- **Issue Priority Number** – Automatically calculated by multiplying Severity, Frequency, and Containability values.
- **Issue Assignee** – Allows the user to directly assign an owner to the issue.

- **Man** – Part of the 6M root cause analysis, this field is used to capture any human-related factors contributing to the issue.
- **Method** – Another 6M root cause field used to document process or procedural factors related to the issue.
- **Machine** – A 6M root cause field for identifying equipment- or machinery-related contributors to the issue.
- **Materials** – Used to capture any material-related factors, such as raw material defects or inconsistencies.
- **Measurement** – Refers to any issues arising from inspection, calibration, or measurement systems.
- **Mother Nature** – Captures environmental factors that could have influenced the issue, such as temperature, humidity, or lighting
- **Issue Root Cause** – This is where you can begin defining the root cause of the issue.
- **Issue Investigation Notes** – Use this field to document any relevant investigation notes related to the issue.

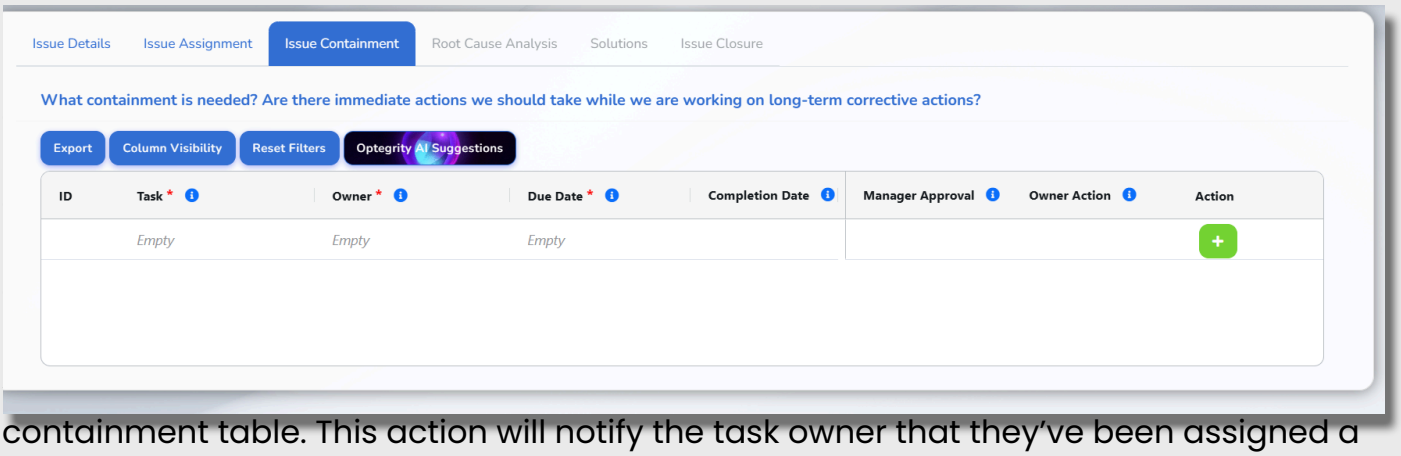
ISSUE ASSIGNMENT

Once an issue has been captured, the next step is assignment. This stage ensures that each issue has a clearly designated owner who is responsible for driving it through the rest of the workflow. Depending on the setup for the issue type, assignments may need to be approved by a department manager or manually selected during capture.



ISSUE CONTAINMENT

Once an issue has been assigned, the next step is to create containment actions. Containment is about putting immediate measures in place to control the impact of the issue while a root cause is being investigated. The Containment section in Resolve is organized into a table format, and users can add as many actions as needed to address the issue.



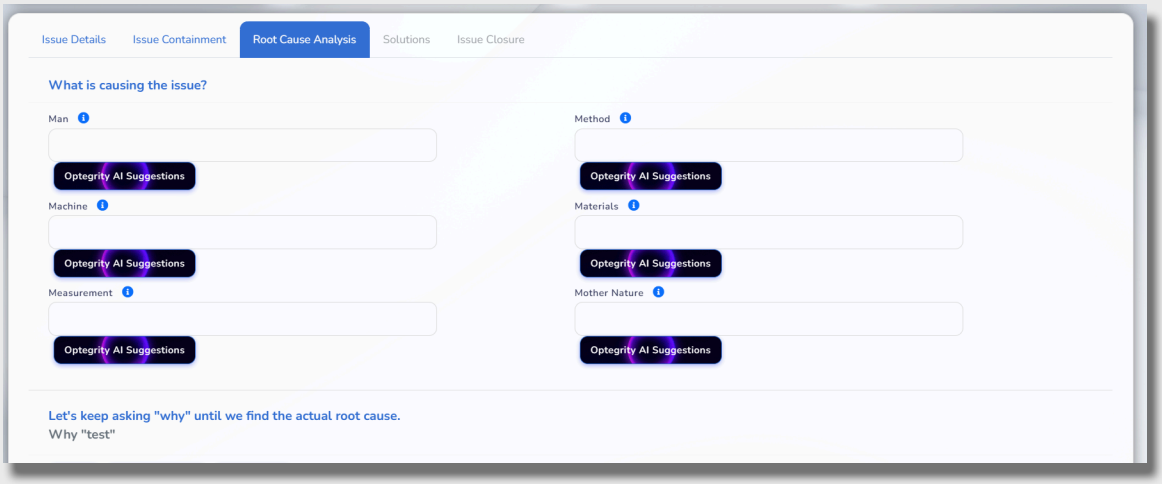
containment table. This action will notify the task owner that they've been assigned a containment action.

If the issue type requires manager approval for containment tasks, a notification will also be sent to the appropriate manager. The manager can then review and approve or reject the task by selecting an option from the **"Manager Approval"** dropdown field.

Once the task owner has completed their assigned containment task, they can mark it as completed by clicking the green checkmark icon in the table.

ROOT CAUSE ANALYSIS

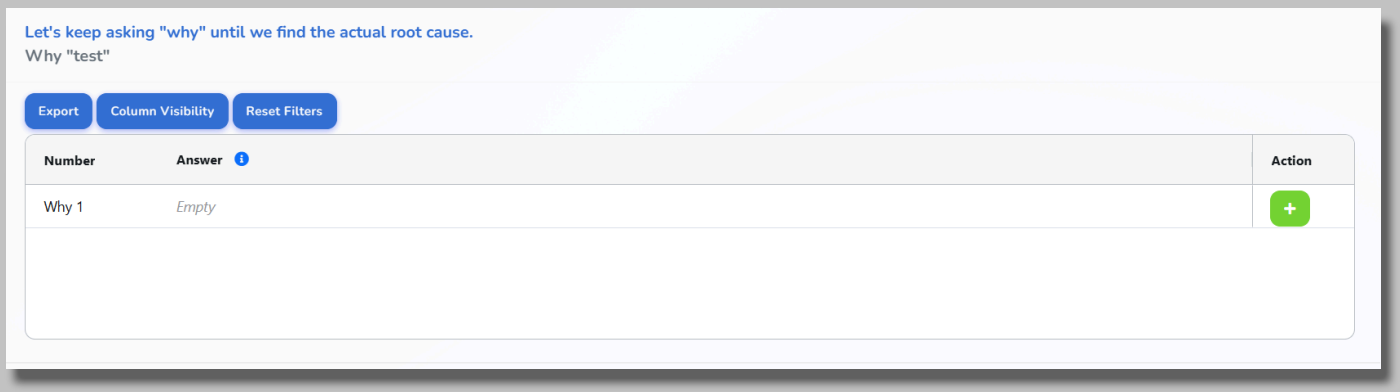
Once containment actions are underway, the next step is to determine the root cause of the issue. Depending on how your organization has configured the issue type, Resolve supports two primary approaches for Root Cause Analysis: 6Ms and 5 Why's.



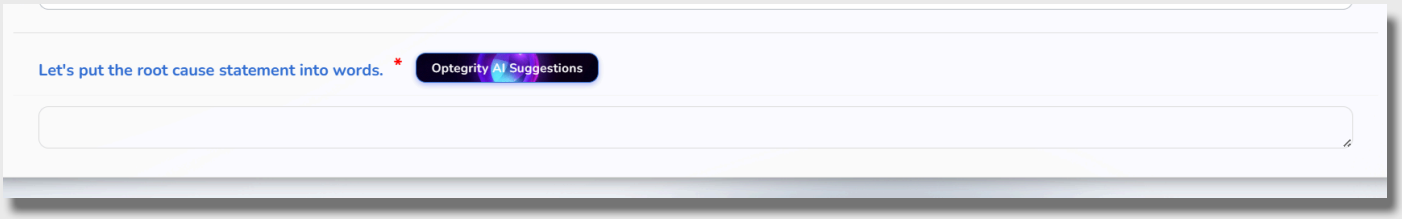
6Ms – This method presents the user with text boxes corresponding to the 6Ms of root cause analysis. The user can document potential contributing factors under each category:

- **Man** – Human-related factors such as operator error, lack of training, or miscommunication.
- **Method** – Issues related to how the work is done, including standard procedures or lack thereof.
- **Machine** – Equipment-related issues such as malfunctioning tools, maintenance problems, or poor setup.
- **Materials** – Raw materials or components that may be defective, inconsistent, or inappropriate for the task.
- **Measurement** – Problems with how quality or performance is measured, including calibration errors or inaccurate data.
- **Mother Nature** – Environmental factors like temperature, humidity, lighting, or other workplace conditions that may contribute to the issue.

5 Why's – This method uses a simple table. Users answer "Why?" for each row, drilling down to the root cause. When a row is complete, click the green **"+"** button to add another row.

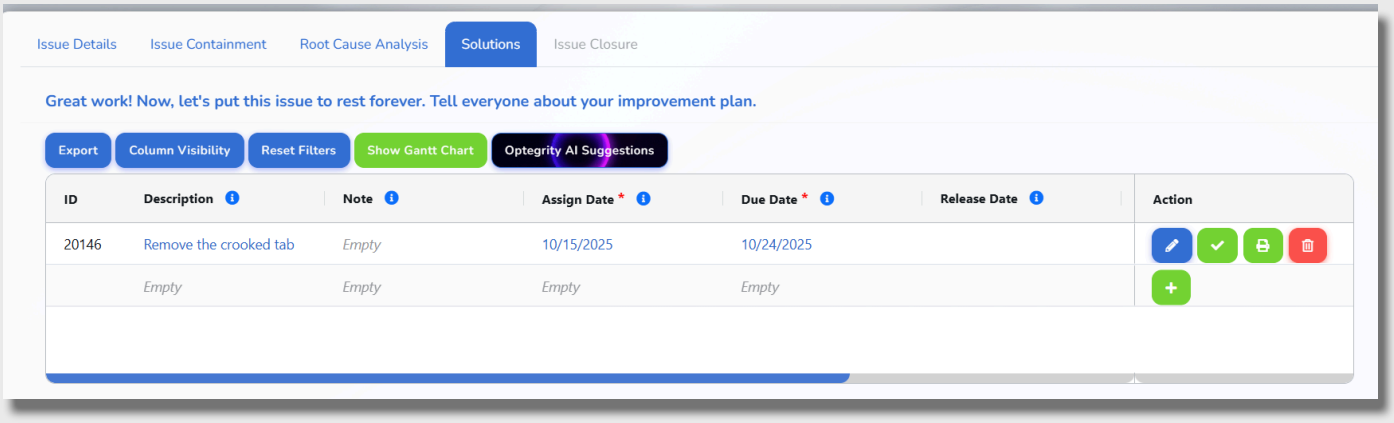


Once either method (or both) has been completed, the user enters the finalized **Root Cause Statement** into the provided text box to summarize the underlying cause of the issue.



SOLUTION MANAGEMENT

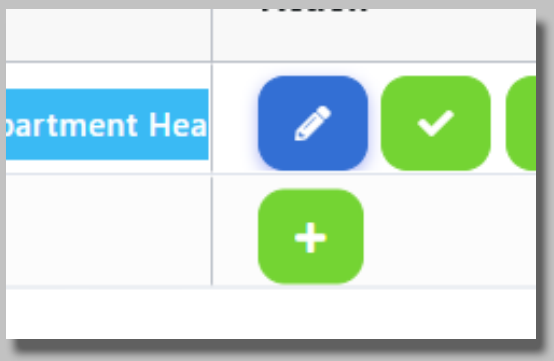
The **Solutions Table** functions similarly to the **Containment Table** but includes additional fields to handle a variety of solution types. Users can add as many solutions as needed to resolve the issue completely.



Creating a new Solution

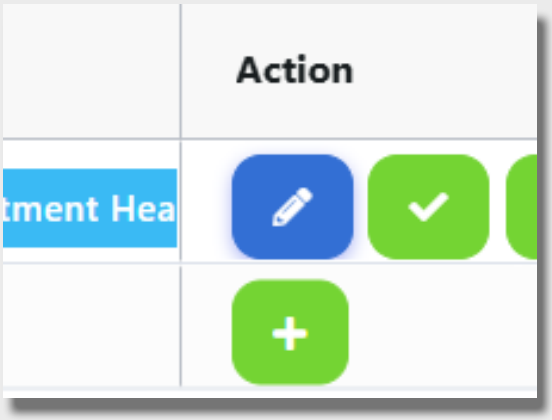
A solution may include the following fields:

- **Description** – A description of the solution task.
- **Note** – Additional notes related to the solution.
- **Assign Date** – The date the solution was assigned.
- **Due Date** – The date the solution is expected to be completed.
- **Release Date** – The date the solution is approved for implementation.
- **Owner** – The person responsible for completing the solution.
- **Solution Type** – Select the type of solution from the dropdown box.
- **FG Disposition** – Determine what to do with finished goods: "Does Not Apply," "Use Up," "Scrap," or "Rework."
- **WIP Disposition** – Determine what to do with work-in-progress material. Options are the same as FG Disposition.
- **Distribution** – Select the departments that need to be informed of or involved in the solution.
- **Change Type** – Specify the type of change: "Running Change" or "Change Order."



Once the required fields are completed, click the green **+** button to add the solution to the table. Notifications will be sent to the assigned owner and, if required by the issue type, to a manager for approval.

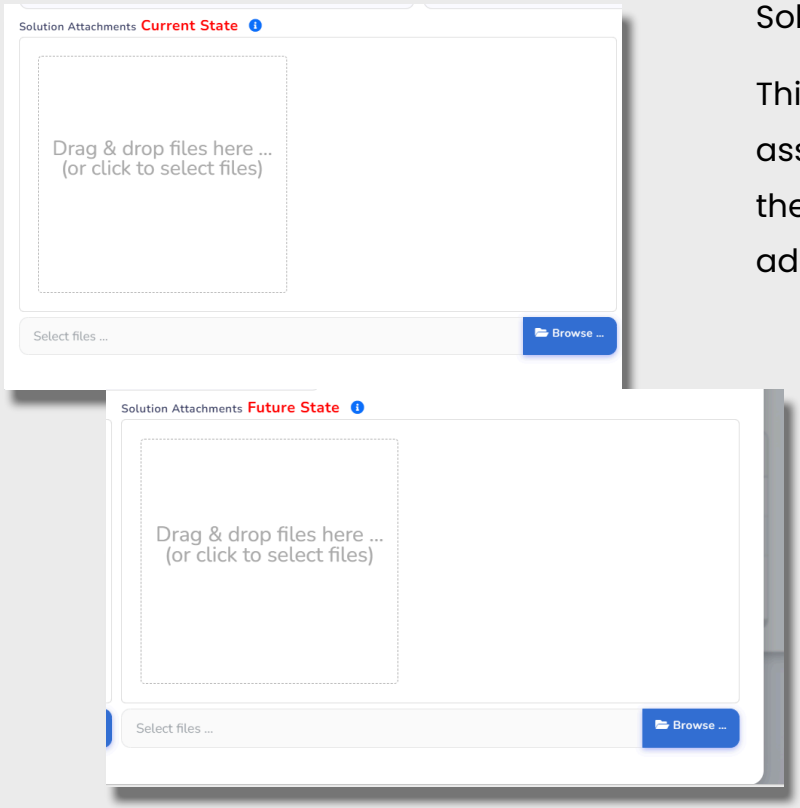
ADDITIONAL SOLUTION DETAILS AND STEPS



Additional Solution Details

Clicking the **"Blue Pen Icon"** opens the Solution Detail popup, which contains some additional tabs. Depending on how your company and configured their issue workflows these may or may not be available.

SOLUTION ATTACHMENTS



Solution Attachments

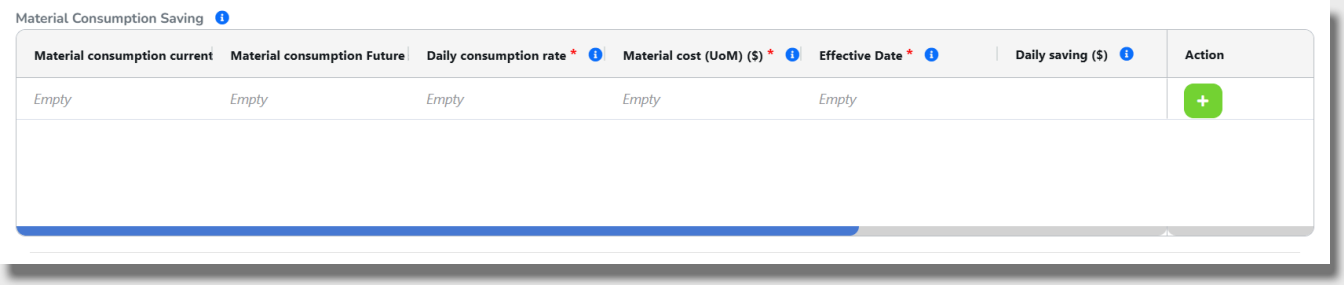
This tab displays the original assignment information and allows the user to attach files to two additional fields:

- Current State – Upload documentation or visuals of the current process or condition.
- Future State – Upload documentation or visuals describing the intended improvement.

COST ANALYSIS

This tab includes three tables for defining cost savings:

Material Consumption Savings

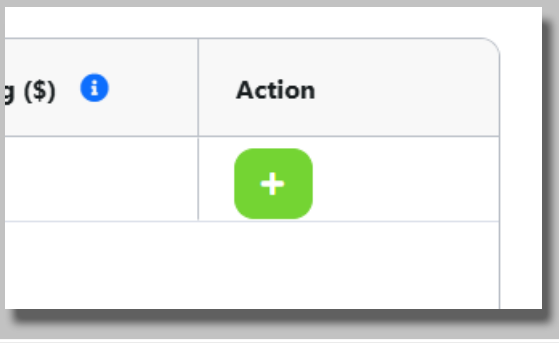


To calculate **Material Consumption Savings**, complete the following fields.

- **Material Consumption Current State (UoM) -** The current material consumption amount per unit of measure before implementing the solution.
- **Material Consumption Future State (UoM) -** The projected material consumption amount per unit of measure after the solution is implemented.
- **Daily Consumption Rate -** The quantity of material consumed daily under the current process.
- **Material Cost (UoM) ($) -** The cost of the material per unit of measure in dollars.
- **Effective Date -** The date when the material savings change is implemented and goes into effect.

The following fields are auto-calculated:

- **Daily Saving -** The calculated daily cost savings from the difference in material consumption.
- **Annual Saving -** The projected yearly savings from improved material efficiency.
- **Actual Saving -** The verified or confirmed amount saved from material usage changes.



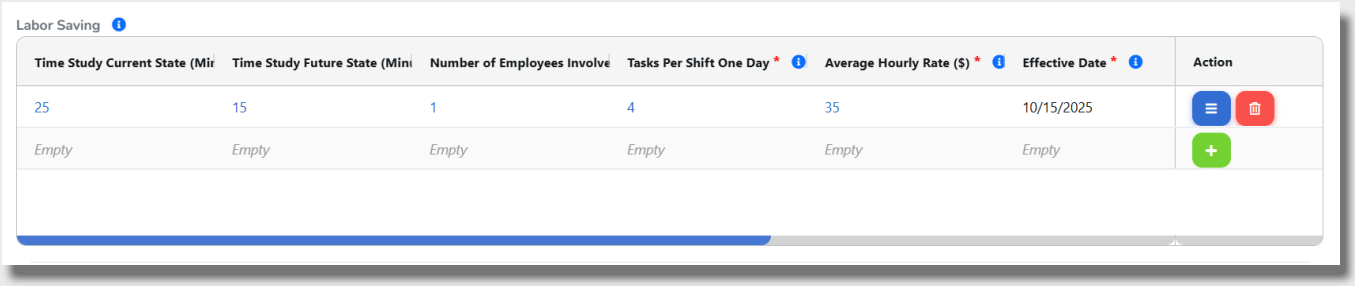
Adding Material Cost Savings

Once the necessary fields are filled out, click the green **"+"** button to save the savings entry.

Labor Savings

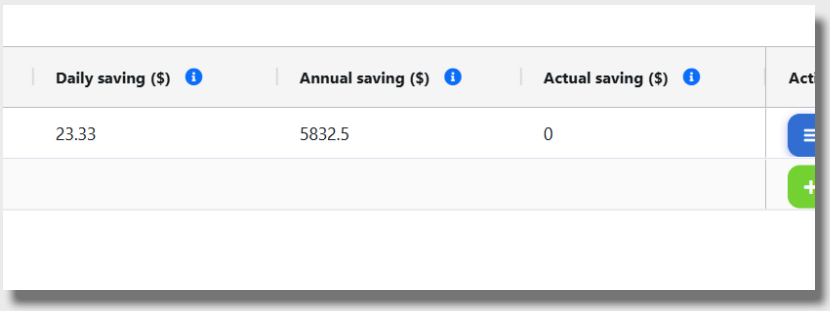
To calculate **Labor Savings**, complete the following fields:

- **Time Study Current State (minutes) -** The amount of time required to complete the task under the current process.
- **Time Study Future State (minutes) -** The projected time required to complete the task after the improvement.
- **Number of Employees Involved -** The number of people who perform the task being analyzed.
- **Tasks Per Shift Per Day -** How many times the task is performed per shift in a single day.
- **Average Hourly Rate -** How many times the task is performed per shift in a single day.
- **Effective Date -** The date when the labor savings change takes effect.

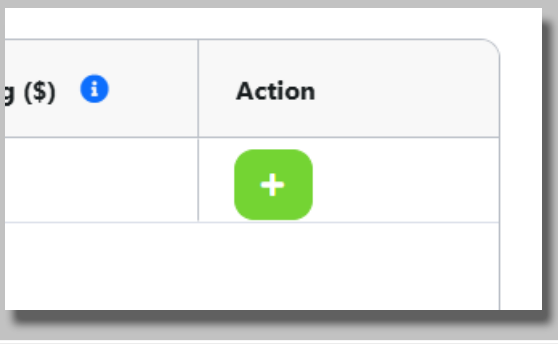


The following fields witll be auto-calculated:

- **Daily Saving -** The calculated daily labor savings in dollars.
- **Annual Saving -** The projected yearly labor savings.



- **Actual Saving –** The confirmed savings based on real-world performance.



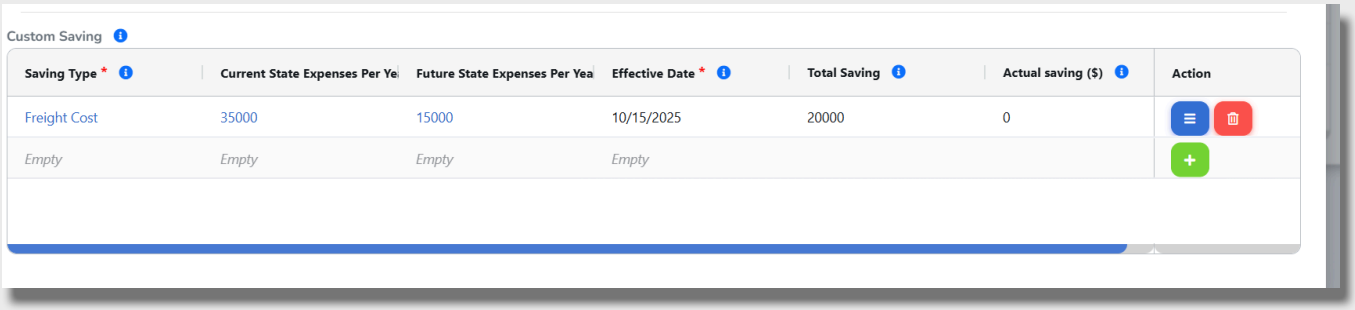
Adding Labor Savings

Once the necessary fields are filled out, click the green **"+"** button to save the savings entry.

Custom Savings

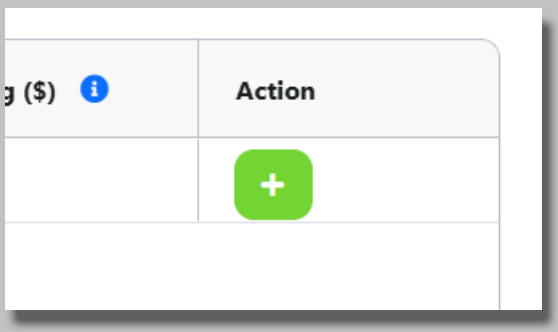
To calculate **Custom Savings**, complete the following fields:

- **Savings Type –** A dropdown list of savings categories such as Free Cost, Material Consolidation, etc.
- **Current State Expenses Per Year –** The annual cost under the current process or supplier agreement.
- **Future State Expenses Per Year –** The projected annual cost after implementing the proposed solution.
- **Effective Date –** The date the new savings scenario is implemented.



The following fields witll be auto-calculated:

- **Total Savings -** The difference between current and future state annual expenses.
- **Actual Savings -** The confirmed cost savings achieved after implementation.

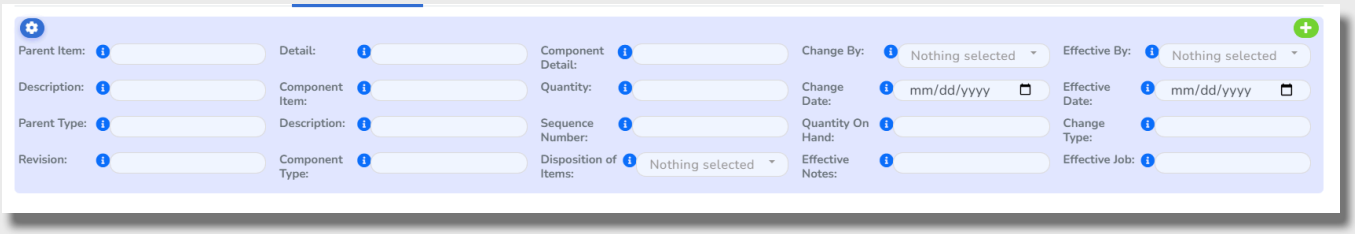


Adding Custom Savings

Once the necessary fields are filled out, click the green **"+"** button to save the savings entry.

SOLUTION DETAILS

This tab is designed to store part-level details relevant to ERP integrations and change management processes. It is especially useful when dealing with Engineering Change Notices (ECNs) and linked item data.



Within this tab, users can input part-specific information such as:

Parent Item - The top-level assembly or item affected by the change.

Description - Text description of the parent item or change.

Parent Type - Specifies the classification or category of the parent item.

Revision - The current revision level of the parent item.

Detail - Additional information about the parent item or change request.

Component Item - A specific subcomponent or part affected by the change.

Description - Description of the component item.

Component Type - Category or classification of the component item.

Component Detail - Additional details or attributes of the component item.

Quantity - Quantity of the component involved in the change.

Sequence number - The order of operations or reference number for the change.

Disposition of Items - Specifies what to do with affected items (e.g., scrap, rework).

Change By - Name of the user or engineer submitting the change.

Change Date - Date the change was created or submitted.

Quantity On Hand - Current inventory level of the affected item.

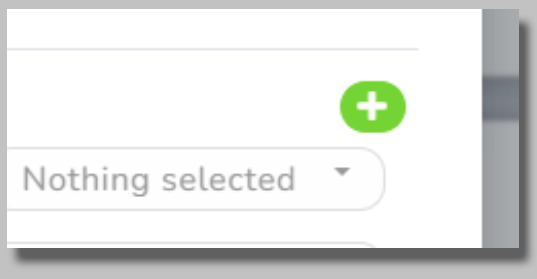
Effective Notes - Text notes about when or how the change will take effect.

Effective By - Person responsible for implementing the change.

Effective Date - Date when the change becomes active in production.

Change Type - Classifies the type of change (e.g., ECN, deviation, temp change).

Effective Job - The specific production job where the change will first apply.



Once all the necessary fields are completed, click the green **"+"** to add the solution detail information.

As many parts can be added to the solution details as ar necesary.

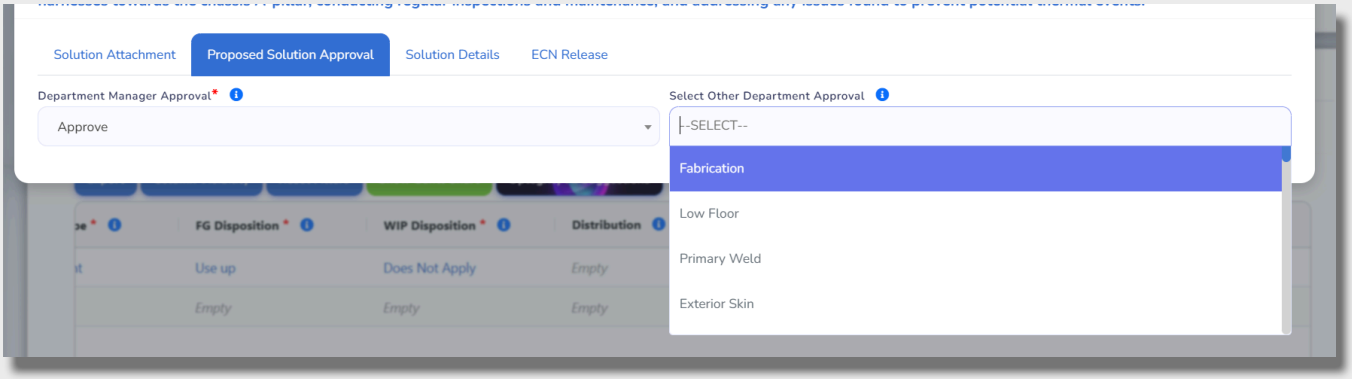
PROPOSED SOLUTION APPROVAL

This tab allows department managers to review and approve proposed solutions before they are implemented.

If approval is required, the department manager should use the following fields:

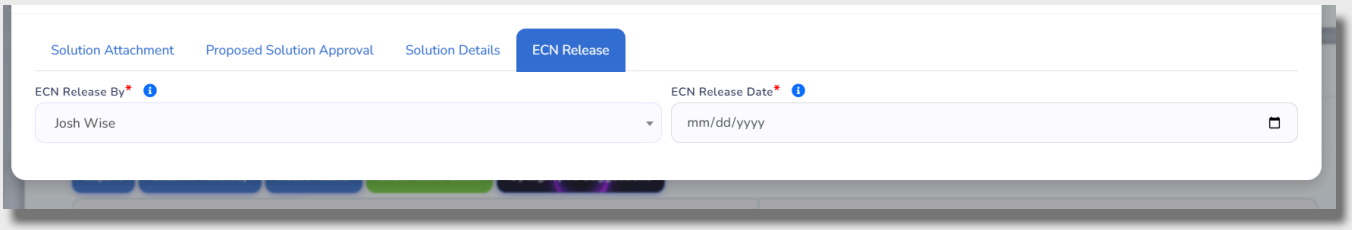
- **Department Manager Approval** – Select "Approve" or "Reject" from the dropdown to indicate their decision.
- **Select Other Department Approval** – Use this dropdown to assign additional department managers who may need to review and approve the solution.

Once these fields are completed, all assigned approvers will be notified accordingly.



ECN RELEASE

This tab is where ECNs are marked as released as well as recording who released them for tracability.



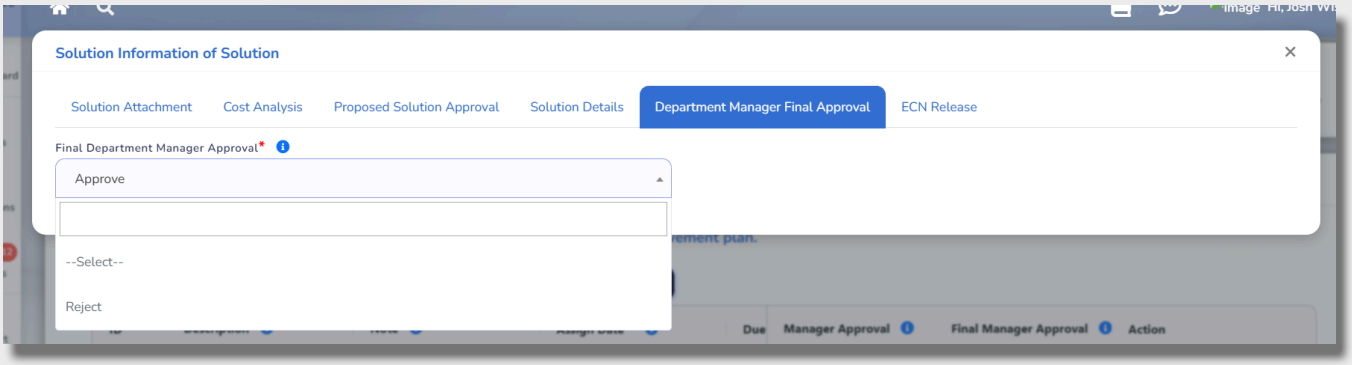
This tab has two fields:

- **ECN Release By** – Specify who is releasing the Engineering Change Notice (ECN).
- **ECN Release Date** – Set the effective date for the ECN.

This step finalizes the change and communicates the planned rollout timeline.

DEPARTMENT MANAGER FINAL APPROVAL

This tab mirrors the functionality of the Proposed Solution Approval tab but is only available once the solution owner has officially submitted the solution for approval.

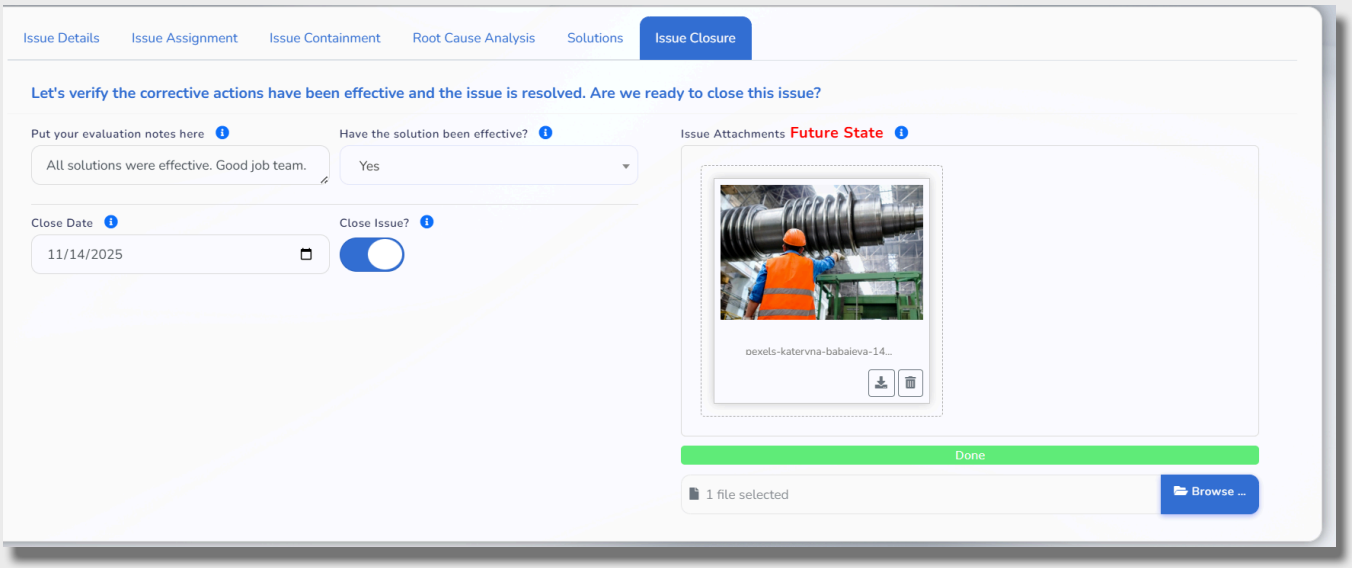


Once the solution has been marked complete by the solution owner, managers can access this tab and use the **Department Manager Final Approval** dropdown to select "Approve" or "Reject."

Only after selecting **Approve** will the user be able to proceed to the final approval step; **Issue Closure**.

ISSUE CLOSURE

The final step in the issue management process is closure. Once solutions have been implemented and verified, the issue can be formally closed out.



The **Issue Closure** tab includes the following fields:

- **Evaluation Notes** – A field for the original issue reporter (or relevant stakeholder) to provide comments about how the issue was addressed.
- **Has the solution been effective?** – A dropdown box where users can select "Yes" or "No."
- **Close Date** – If the solution is deemed effective, enter the date the issue is considered resolved.
- **Close Issue Toggle** – Check this box to mark the issue as officially closed.
- **Attachments** – Add any final supporting documentation, such as future state visuals, test results, or implementation confirmations.

Once the closure date is set and the toggle is activated, the issue is considered fully resolved in the system.

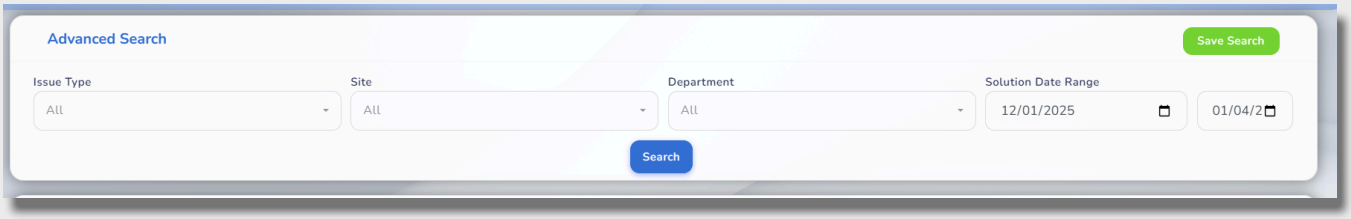
REPORTING

Reporting in Resolve provides visibility into how issues are impacting your operation and how effectively they are being addressed. Reports allow teams to analyze trends, measure performance, and quantify the results of corrective actions. The reporting tools in Resolve are designed to support data-driven decision making by turning issue activity and savings data into actionable insights.

ISSUE TYPE REPORT

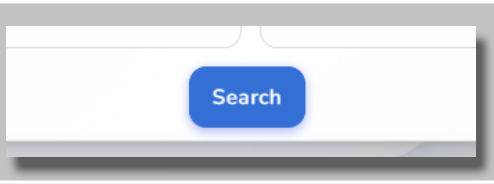
The Issue Type Report provides a high-level view of how different types of issues are being handled across the organization. It displays a table showing each issue type along with its average response time and the percentage of issues completed on time, helping teams identify bottlenecks, compare performance by issue type, and focus improvement efforts where delays are most common.

The Issue Type Report includes several search criteria that allow users to narrow the results to the most relevant data. These filters help focus the report on specific areas of the business or time periods.

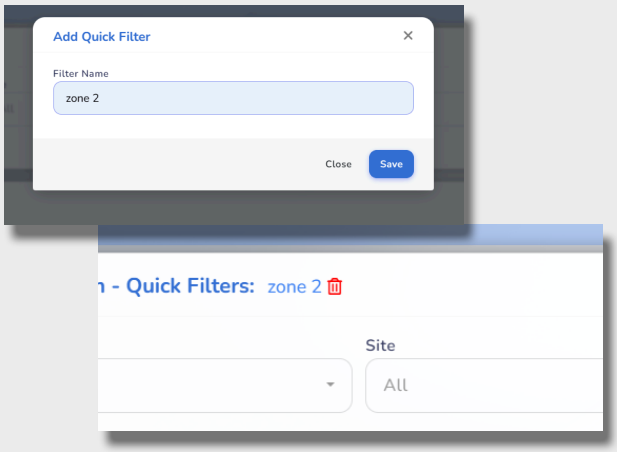


- **Issue Type** – Limits the report to one or more selected issue types.
- **Site** – Filters results to issues associated with a specific site.
- **Department** – Narrows the data to issues originating from a specific department.
- **Solution Date Range** – Returns issues with solutions completed within the selected date range.

If any of these fields are left blank, the report will return all results for that field by default.



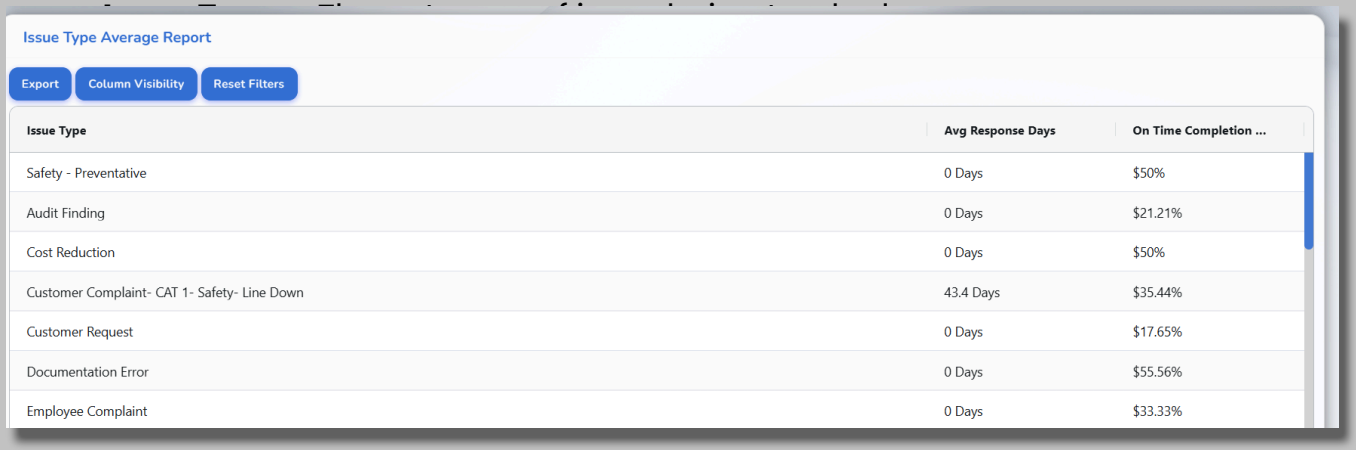
Click **Search** to genterate the report.



To save these search parameters for furture use click **"Save Search"**.

- This is will prompt you to give the Search a name and then click **"Save"**.
- Saved searches appear above the search input fields.

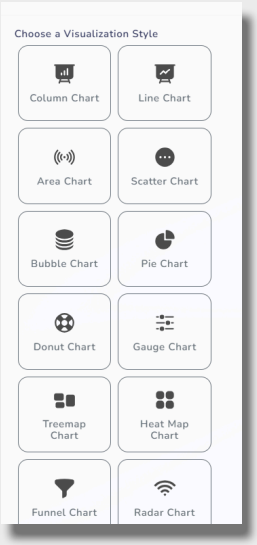
Issue Type Report Results



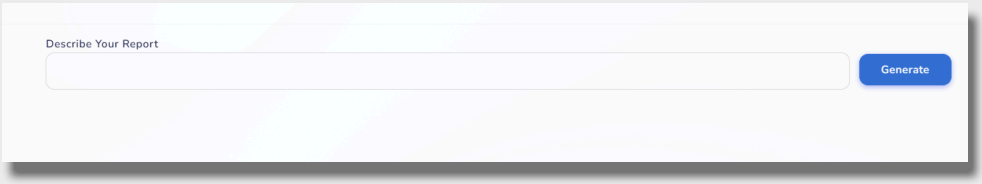
Issue Type	Avg Response Days	On Time Completion ...
Safety - Preventative	0 Days	$50%
Audit Finding	0 Days	$21.21%
Cost Reduction	0 Days	$50%
Customer Complaint- CAT 1- Safety- Line Down	43.4 Days	$35.44%
Customer Request	0 Days	$17.65%
Documentation Error	0 Days	$55.56%
Employee Complaint	0 Days	$33.33%

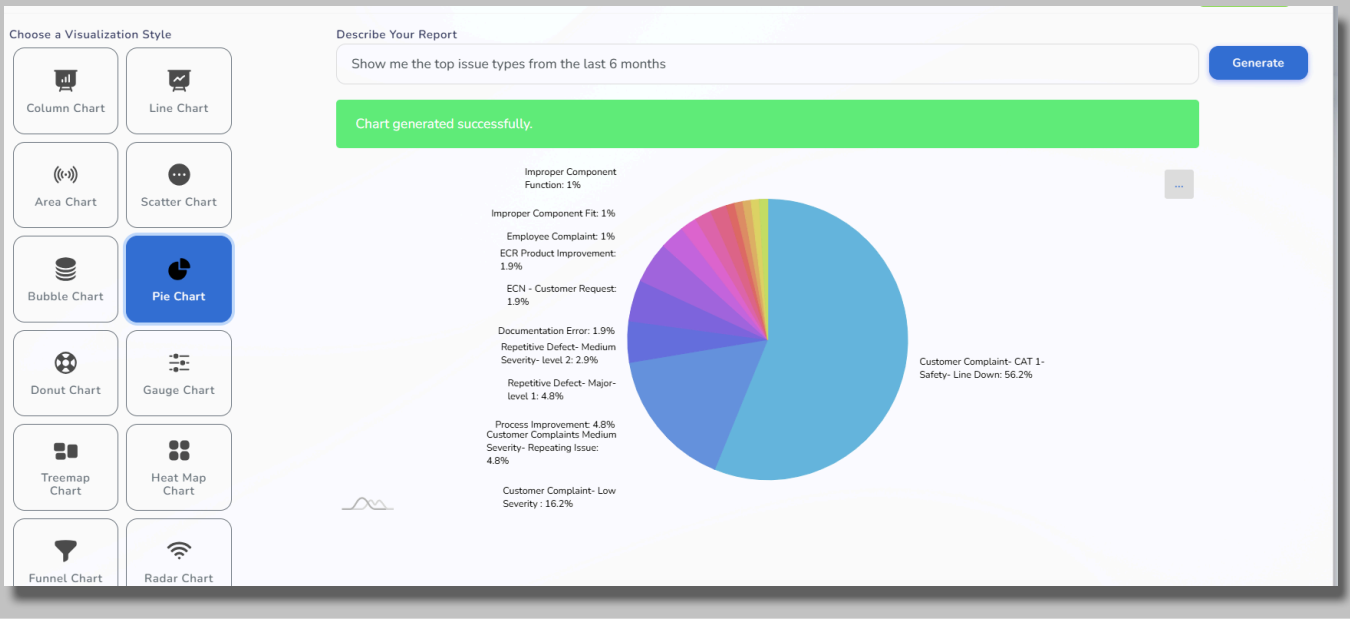
OPTEGRITY INSIGHT QUEST

The Optegrity Insight Quest leverages AI to help users quickly generate custom reports without needing to configure complex filters or report settings. By selecting a display type and describing the desired report in plain English, users can instantly generate visual insights—such as charts and summaries—that highlight trends, performance, and problem areas across their data.



- 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.



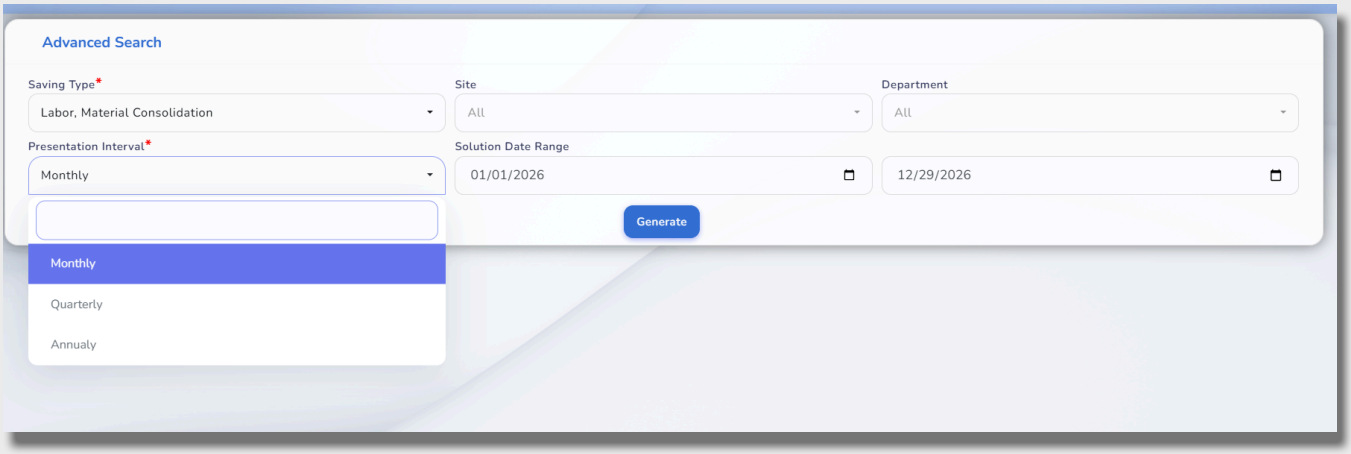


SAVING REPORT

The Savings Report allows users to track and quantify the financial impact of their problem-solving efforts. By aggregating savings data from implemented solutions, this report helps organizations understand cost reductions, validate ROI, and highlight the tangible benefits of continuous improvement activities.

Running the Savings Report

The Savings Report includes several search parameters that allow users to tailor the results to specific savings categories, locations, and timeframes.



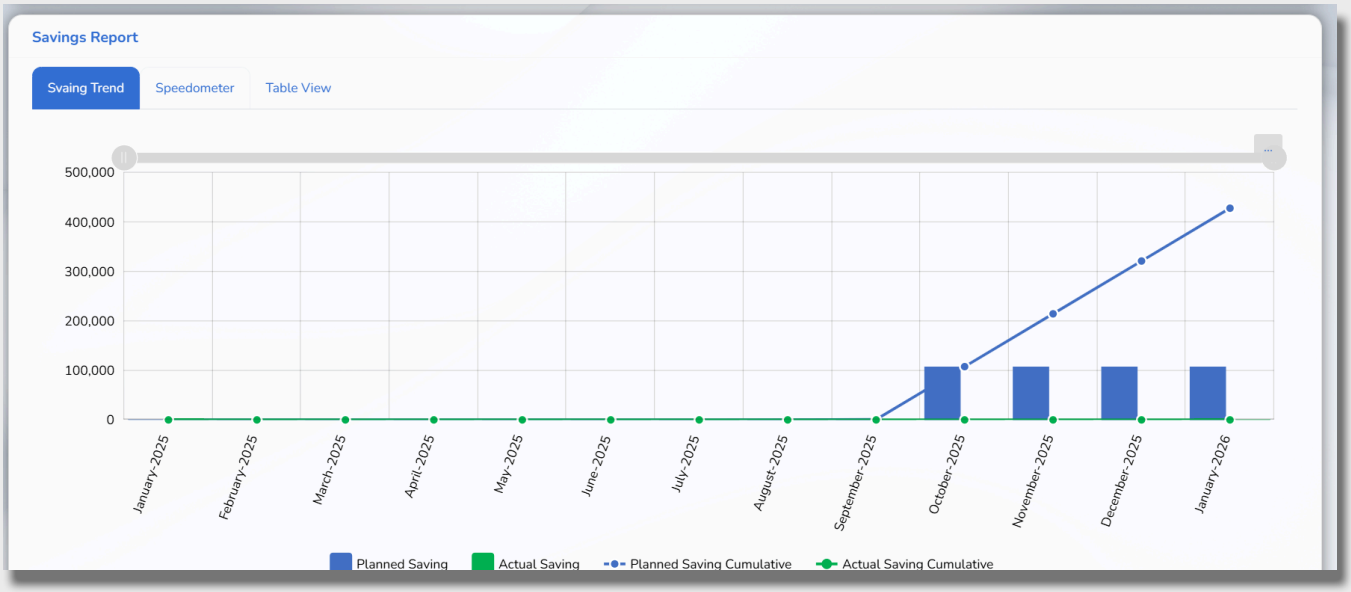
- **Saving Type –** A dropdown list of available savings types. Users can select one or multiple types to include in the report.
- **Site –** Filters results by manufacturing site.
- **Department –** Limits the report to savings associated with a specific department.
- **Presentation Interval –** Sets how results are grouped and displayed (monthly, quarterly, or annually).
- **Solution Date Range –** Defines the date range for solutions included in the report.

Once the desired criteria are selected, click **"Genereate"** to view summarized savings results based on their selections.

Savings Report Results

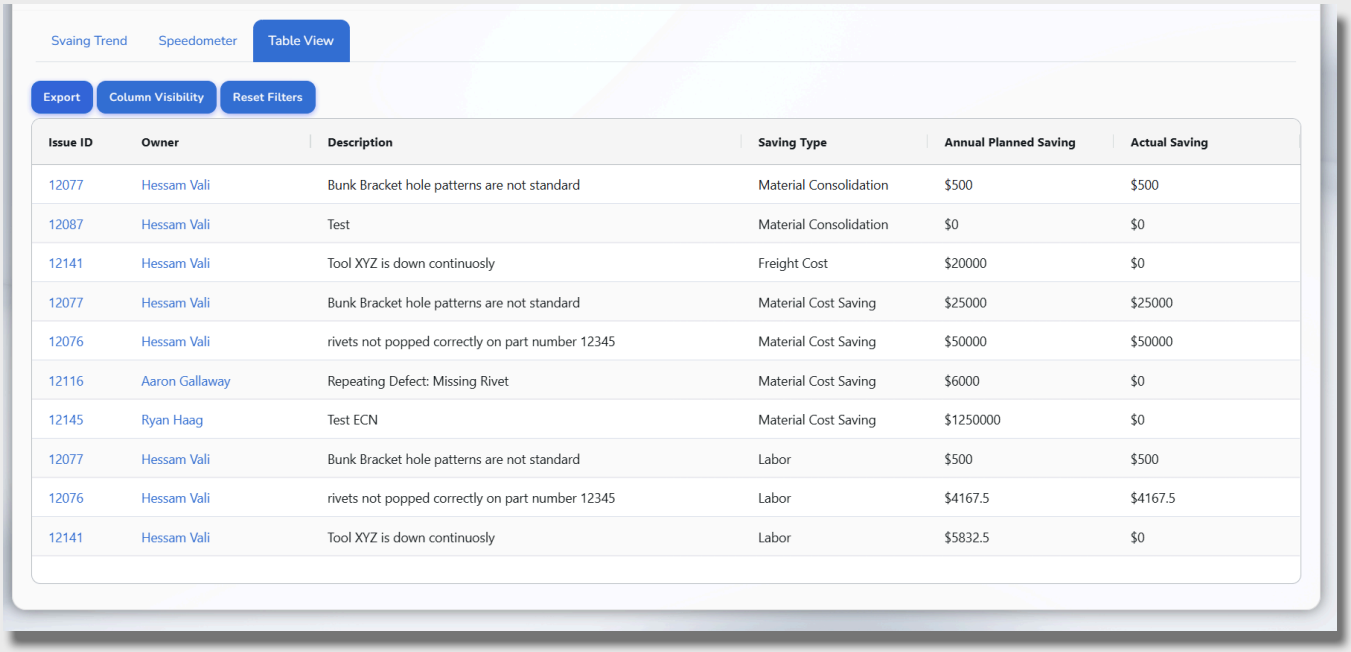
The Savings Report generates results across three separate tabs, each providing a different view of savings performance and impact.

Saving Trend – Displays planned versus actual savings on a trend graph over the past year, making it easy to track progress and performance over time.



Speedometer View – Provides a high-level visual indicator of savings performance, offering a quick snapshot of actual savings.

Table View – Shows a detailed breakdown of all returned solutions, including saving type, annual planned savings, and actual savings for each solution.



Issue ID	Owner	Description	Saving Type	Annual Planned Saving	Actual Saving
12077	Hessam Vali	Bunk Bracket hole patterns are not standard	Material Consolidation	$500	$500
12087	Hessam Vali	Test	Material Consolidation	$0	$0
12141	Hessam Vali	Tool XYZ is down continuosly	Freight Cost	$20000	$0
12077	Hessam Vali	Bunk Bracket hole patterns are not standard	Material Cost Saving	$25000	$25000
12076	Hessam Vali	rivets not popped correctly on part number 12345	Material Cost Saving	$50000	$50000
12116	Aaron Gallaway	Repeating Defect: Missing Rivet	Material Cost Saving	$6000	$0
12145	Ryan Haag	Test ECN	Material Cost Saving	$1250000	$0
12077	Hessam Vali	Bunk Bracket hole patterns are not standard	Labor	$500	$500
12076	Hessam Vali	rivets not popped correctly on part number 12345	Labor	$4167.5	$4167.5
12141	Hessam Vali	Tool XYZ is down continuosly	Labor	$5832.5	$0

CONCLUSION

This Quickstart Guide has provided an overview of Resolve's core features to help you get started with issue tracking and problem-solving. 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.