Issues

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Issues are versatile in that they can be used to track several things relating to items, jobs, nodes and operations. For example, it can be used for recording non conformances, audit findings, improvement ideas, customer complaints, vendor complaints and more.

A single issue can be linked to multiple entities (items, jobs, nodes and operations). Issues can be nested where multiple parent-child relationship levels are supported.

The **Issue Tracking** page manages and tracks all issues in the system.

Issue Types

An issue type specifies what information is required for an issue of a specific type. This allows you to adapt an issue to different things. For example, you may have a quality issue type and a health and safety issue type. These are completely different and therefore most of the information required to create the issue and ultimately resolve it, will also differ. It also categorises the tickets in a way that can be easily identified by the relevant teams in the organisation. For example, a logistics issue type might be relevant for the Logistics team.

New/Edit Issue Type

1. Navigate to the **Issue Tracker** page and click the **Types** button to display the **Issue Type** page.

2. Click the **New** button to display the **New Issue Type** screen.

3. Complete the **New Issue Type** input screen.

New Issue Type input screen

The following properties can be defined for *New Issue Type*:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Name of the issue type.
- **Description**: A description of the issue type.
- **Parent Issue Type**: Issues and issue types can be nested. If required, provide the parent issue type.
- **Require Title***: Defines if a title is required for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent*.
- **Require Description***: Defines if a description is required for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent*.
- **Require Owner***: Defines if an owner is required for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent*.
- **Require External Ref***: Define if an external reference is required for issues of this type. This could be required if you have an external Quality Management System (QMS). Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent.*
- **Require Quantity***: Define if a quantity of affected items is required for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent*.
- **Require Team***: Define if a team should be assigned for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent.*
- **Require Parent IssueID***: Define if a parent issue ID is required for issues of this type. Options are: *Hidden (default)*,

Compulsory, *Optional*, *Copy from Parent.*

- **Require Rank***: Severity of an issue. Define if a rank is required for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent.*
- **Require Pcnt Complete***: Define if percentage complete is required for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent.*
- **Require Priority***: Define if a priority is assigned for issues of this type. Options are: *Hidden (default)*, *Compulsory*, *Optional*, *Copy from Parent.* An issue with this field configured gives you an option of selecting the following priorities: *Low, Medium, High, Critical.*
- **Require Resolution Details***: Define if a parent issue ID is required for issues of this type. Options are: *Hidden*, *Compulsory*, *Optional (default)*, *Copy from Parent.*
- **Create Permission***: Select the permission required to create tickets of this type. Typically, this has the lowest level of permission as you want the operator on the shopfloor to create issues that they encounter.
- **Edit Permission***: Select the permission required to edit tickets of this type. You might want a higher level of permission to edit issues.
- **Edit Issue Item Permission***: Select the permission required to edit issue item of this type. You might want a higher level of permission as linking them to jobs, for example, could put those jobs on hold.
- **Close Permission***: Select the permission required to close issues of this type. You might need a higher level of permission to close issues.
- **Require Owner Skill**: Defines the skill required to work on issues of this type.
- **Is QA Hold** checkbox: When you create an issue, you can link specific jobs, items and operations to the issue. Tick this box if you want anything linked to issues of this type to be put on hold. If left unticked, you can continue working on the item, job or operation whilst the issue is being resolved.

Issue Type Properties

When you create an issue type, you specify which of the system properties to include for issues of that type. These properties are displayed when you add or edit the issue. If you want additional properties for an issue type, you specify it in the **Issue Type Properties** screen.

You can then access the additional properties by clicking an issue in the **Issue Tracker** page and clicking the **Advanced** button.

New Issue Type Property

1. Navigate to the **Issue Tracker** page and click the **Types** button to display the **Issue Type** page.

2. Click the **Properties** button to display the **Issue Type Properties** screen.

3. Complete the **New** input screen.

New Issue Type input screen

The following properties can be defined:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Name of the property.
- **Default**: The default value for this property.
- **Data Type***: The data type of the property. Options: *Text, Numeric, Date*.
- **Allow Empty***: Choose if this field can be empty.
- **Input Type***: Select an input type. Options:
- **Combo Sql**: Mandatory when you select *Combobox* in the **Input Type** field. Specify the SQL to use. Discuss this option with Eyelit support.

Issue Type Reasons

It is possible to define a list of reasons that apply to issues. New reasons created will automatically be assigned to the selected issue type but may subsequently be assigned to other additional issue types.

The reasons that are configured in the **Issue Type Reasons** popup will be presented to the operator in a dropdown when an issue is created. The reasons relevant for one type of issue often differs from the reasons relevant for another type of issue. The can configure which reasons relate to which issue types in the **Issue Type Reasons** popup.

Reasons can be added, edited assigned, unassigned and deleted.

New Reason

1. Navigate to the **Issue Tracker** page and click the **Types** button.
2. Select an issue type listed in the grid to display additional menu buttons then click the **Reasons** button.
3. Click the **New** button to display the **New Reason** input screen.
4. Provide a reason and description.

Reasons can be assigned and unassigned at any time (see section below).

Assign/unassign an issue type reason to an issue type

1. Navigate to the **Issue Tracker** page and click the **Types** button.
2. Select an issue type listed in the grid to display additional menu buttons then click the **Reasons** button.
3. Select a reason and click the **Assign** button to assign it to the issue type. Repeat for each reason relevant to the issue type.
4. You can select an assigned reason and click the **Unassign** button to unassign it from the issue type.

Issue Type Resolutions

It is possible to define a list of resolutions that apply to issues. New resolutions created will automatically be assigned to the selected issue type but may subsequently be assigned to other additional issue types.

The types of resolutions that are configured for an issue type will be presented to the operator when resolving a ticket of that type.

New/Edit Reason

1. Navigate to the **Issue Tracker** page and click the **Types** button.
2. Select an issue type listed in the grid to display additional menu buttons then click the **Resolutions** button.
3. Click the **New** button to display the **New Resolution** input screen.
4. Provide a resolution and description (optional).

Assign/unassign an issue type reason to an issue type

1. Navigate to the **Issue Tracker** page and click the **Types** button.

2. Select an issue type listed in the grid to display additional menu buttons then click the **Resolutions** button.

3. Select a resolution and click the **Assign** button to assign it to the issue type. Repeat for each resolution relevant to the issue type.

4. You can select an assigned resolution and click the **Unassign** button to unassign it from the issue type.

Create an issues

An issue of a specific issue type can be created and linked to an item, job, job operation or node.

Create an issue in Issue Tracking

1. Navigate to the **Issue Tracker** page and click the **New** button to display the **New/Edit Issue** input screen.

2. Complete the **New/Edit Issue** input screen.

New/Edit Issue input screen

The fields that are displayed on the screen depends on the configuration of the issue type. Detailed descriptions are under the New/Edit Issue Type section.

The following properties can be defined for the input screen:

Blue fields in the form are required. An asterisk in the list below defines just those fields that are always required, irrespective of the issue type configuration.

- **Issue Type***: When you select an issue type, the fields that are relevant to that type will be displayed.
- Complete the fields configured for this issue type. For a detailed description of each field, refer to the New/Edit Issue Type section.
- **Due***: The target date for resolving the issue.
- **Item scope***: Select what the issue must be linked to. Options:
  - Item: An item.
  - Job: The issue applies to the whole job.
  - JobOp: A specified operation.
  - Node: A node in workflow.

Nesting issues

Issues can be nested where multiple parent-child relationship levels are supported. For example, you have a design issue that led to many customer complaints. You could create the design issue as the parent and each of the customer complaints as its child issues. You might want to close each customer complaint individually where each child issue will have a different customer, different owner, different due dates, etc.

You can create a child issue which will be of the same issue type as the parent issue. There is no limit to how many parent-child levels you can create. To add a child issue:

1. Navigate to the **Issue Tracker** page, select an issue, and click the **New Child** button.

2. Complete the input screen which is the same as the **New/Edit Issue** input screen.

You can't delete a parent issue that has open child issues.

Linked Documents

Existing documents can be assigned/unassigned to an issue or new documents can be uploaded and assigned/unassigned to an issue. A document can be linked to an issue at any time. For example, it could be related to the issue or its resolution. Documents are version controlled.

Documents that are assigned to the issue are listed in the **Linked Documents** screen. You can search by *Type*, *Scope* and choose to include or exclude issues that are *QA Hold* issues. You can click the **View** button next to a document to open it.

New Documents

You can select new documents to link to an issue.

1. Navigate to the **Issue Tracker** page, select an issue, and click the **Linked Documents** button.

2. Click the **New Document** button to display the **New Document** input screen.

3. Complete the New Document input screen.

New Document input screen

The following properties can be defined for the input screen:

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- **Document Type***: Select a document type. Document types that are linked to the **Issue** entity type will be displayed in the drop down.
- **Document Name***: Name of the document.
- **File***: Select the document you want to link to the issue.
- **Note**: Provide a note.
- **External Ref**: Provide an external reference.

Manage Documents

The **Managed Documents** screen lists documents that are assigned and ones that are unassigned to the issue. You can select a document and assign/unassign it to the issue. When you assign a document, you have to select the version of the document you want linked to the issue.

You can also edit the version of an already assigned document and configure the version that you want linked to the issue. Click the **Edit Version** popup to select the version of the document that must be linked to the issue.

Issue Notes

Notes can be assigned to the issue. You can view the list of notes in the **Issue Notes** screen.

To add a note:

1. Navigate to the **Issue Tracking** screen, select an issue and click the **Notes** button to display the **Issue Notes** screen.

2. Click the **New** button to add a new note. Notes can be edited and deleted.

Linking Issues to entities

The scope of an issue defines what entities issues can be linked to. If the issue is of a QA Hold type, the entity will be put on hold.

Scope Options

Scope options are global settings to which define what issues can be linked to. The options are *Item, Job, JobOp* and *Node*.

To see which scope options are enabled for issues, navigate to the **Issue Tracking** screen and click the **Scope Options** button. You can enable and disable scope options in this screen. Note that changes here will affect all issues of all types.

Entities on hold

There are two ways an entity (job, job operation or item) can be placed on hold.

1. An operator can place an entity on hold at any time.

2. Linking an issue to an entity where the issue is of a type that has the **Is QA Hold** checkbox ticked. Note that if the entity was already on hold when the issue was linked, when the issue is resolved, the entity will revert back to its original hold condition.

Note that when an issue that is of an **Is QA Hold** type is linked to a node, then any entity that is at or arrives at that node is put on hold.

Link an issue

Issues can be assigned to items, jobs, job operations or nodes. To link an issue:

1. Navigate to the **Issue Tracking** page, create a new issue or select an issue that was already created and click the **Edit** button.

2. Click the **Item Scope** dropdown. All possible options are *Item, Job, Job Op* or *Node* and click the **Save & Proceed to Issue Item** button. The options available to choose from in the **Item Scope** dropdown would be determined by what's enabled in **Scope Options**.

For Item Scope = Item

This option could apply in serialised environment. For example, you are making 5 serialised items and one of them has an issue.

If the **Item** option was selected in point 2, the **Add Linked Items** screen would be displayed.

1. Use the search criteria to find the items that have the issue.

2. Tick the boxes next to the items that have the issue which can be identified by their visual serial numbers.

3. Click the **Add Link** button to link the selected items to the issue. The Linked to Issue column will show *Yes* next to items that were linked and these will be displayed at the top of the list.

4. If **Is QA Hold** checkbox was ticked for the issue type, the item will be placed on hold.

For Item Scope = Job

If the **Job** option was selected in point 2, the **Add Linked Jobs** screen would be displayed.

1. Select a line config and click *Search* to display works orders. Note that you can choose to hide or display linked jobs.

2. Check the works orders you want to assign the issue to and click the **Add Link** button.

3. If **Is QA Hold** checkbox was ticked for the issue type, the job will be placed on hold.

For Item Scope = JobOp

This option allows you to stop a job at a specific operation. The jobs can continue until it reaches that point. If the **JobOp** option was selected in point 2, the **Add Linked Job Ops** screen would be displayed.

1. Search by line config, work centre group, product type and order number, and click *Search* to list job operations. You can choose to hide or display linked jobs and completed or cancelled operations.
2. Check the job operations you want to assign the issue to and click the **Add Link** button.
3. If **Is QA Hold** checkbox was ticked for the issue type, the job operation will be placed on hold.

For Item Scope = Node

This allows you to link issues to jobs that you have in the system now or that you might have in future. It will put any job that uses a specific operation node in a specific workflow version that is linked to the issue, on hold. Note that this differs from an issue with a **Job** scope. A **Jobs** scope only allows you to link the issue to existing jobs.

If the **Node** option was selected in point 2, the **Add Linked Jobs** screen would be displayed.

1. Use the search criteria to find a specific node in a specific workflow version that has the issue.
2. Tick the box next to the node that has the issue.
3. Click the **Add Link** button to link the selected node to the issue. The **Linked to issue** column will show *Yes* next to nodes that were linked.
4. If **Is QA Hold** checkbox was ticked for the issue type, any entity that is at or arrives at this node is put on hold.

Manage Linked Jobs/Job Ops/Items/Workflow Nodes

Depending on the issue's scope, a button will display when the issue is selected which is called "Linked Jobs", "Linked Job Ops", "Linked Items" or "Linked Workflow Nodes".

To manage linked entities:

1. Navigate to the Issue **Tracking** page and select an issue.
2. Click the **Linked Items, Linked Jobs, Linked Job Ops** or **Linked Workflow Nodes** button. The button that is displays depends on the issue scope.

You can view the <entities> that the issue is linked to. You can add additional ones or remove previously linked ones. You can set a selected entity as the primary and view the history of the selected entity links. The primary usually refers to the first entity that encountered the issue.

Add linked <entity>

1. Click the **Add Linked <entity>** button in the **Linked <entity>** screen.
2. Select the search criteria in the **Add Linked <entity>** input screen and select <entities> to link to the issue.
3. Select any search criteria you require to find the entity you want the issue linked to.
4. Select the entities and click the **Add Link** button.
5. To remove a link, select a linked entity and click the **Remove Link** button. You can also remove a linked entity from the **Linked <entity>** screen.

Change the status on a linked entity

You might want to change the status of an issue just for selected entities rather than for the issue itself. To do this:

1. Select the entities and click the **Update Linked <entity>** button in the **Linked <entity>** screen.
2. Update the status and leave a comment. Status values: *Open, Closed, Deleted*.
3. When selecting *Closed*, you must provide the date it was closed.

View a linked issue

It is possible to access information about the issue.

Access issues from the Schedule Manager

1. Navigate to the **Schedule Manager** screen, select the row that's flagged as having an issue linked to it.
2. Click the **Items** button to display the **Job Items** popup.
3. Select a row in the **Detail Per Item** section and click on the **Item Status** button to display the **Item Status** page.
4. In the **View** field, select *Issues* from the drop down to display the issue details.

Access issues from the workstation

1. Navigate to the **Workstation** screen and tick the checkbox on a row that's flagged with an issue.
2. Click the **Item Status** button and , select the row that's flagged as having an issue linked to it.
3. Click the **Item Status** button to display the **Item Status** page.
4. In the **View** field, select *Issues* from the drop down to display the issue details.

Close/unlink an Issue

When an issue is resolved, if any entity was put on hold, it will revert to its original status. An entity that was not hold prior to being linked to the issue, will be release. An entity that was already on hold before being linked to the issue, will revert back to its original on hold status.

You can resolve an issue in one of the following ways:

Close an Issue

Everything linked to the issue will be affected by closing the issue. For example, jobs that were placed on hold due to the issue will no longer be on hold.

1. Navigate to the **Issue Tracking** page, select the issue and click the **Edit** button to display the **Edit Issue** popup.
2. Select *Closed* in the **Status** field then click the Save & Close button.

Unlink selected entities

Where multiple entities were linked to an issue, you can unlink specific entities from the issue. For example, you might want to do an inspection of each job before unlinking it from the issue.

1. Navigate to the **Issue Tracking** page, select the issue and click the **Linked <entity>** button.

2. Select the entity (e.g., job operation) and click the **Remove Linked <entity>** button.

History

You can see the history of an issue. Select the issue in the **Issue Tracking** screen and click the **History** button.

Deleted Issues

You can view deleted issues. In the **Issue Tracking** screen, click the Deleted Issues button. Select the from and to dates to list those issues that were deleted on between those dates. Select an issue and click the **View Details** to display the **Detailed Issue Details** screen.