

Handover for SupplyOn Service

Problem Solver



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1 Purpose of this document

This handout contains the SupplyOn Module Problem Solver, which is trained online. The document serves as a reminder and does not claim to be complete.

1.1 Target group

The document serves the training participants for individual training on site.

1.2 Abbreviations

Abkürzung	Bedeutung
XML	Extensible Markup Language
ERP	Enterprise-Resource-Planning
BI	Business Integration
SO	SupplyOn
VDA	Association of the German automotive industry
PDF	Portable Document Format

2 Complaint Creation with SupplyOn Problem Solver for Buying Companies

2.1 General Purpose and Business Case

A buying company sends a complaint to its suppliers to indicate that a goods or service delivered by the supplier does not conform to the agreed specifications. In most cases, this is done in case of defect parts provided by the supplier.

The defect might be detected:

- during goods receipt
- during assembly
- by a customer of the buying company. In this case, the buying company's customer issues a complaint to the buying company, which itself would send a complaint to its supplier, if the defective part or component was sourced externally or the problem caused by the supplier in any other way.

However, a complaint might also refer to logistical problems (late delivery, wrong bar-coding) or general problems within the processes between buying and selling company.

Therefore, the term "complaint" is used in a general sense in this document. It may or may not have commercial, legal and logistical implications, as it would be the case with a reclamation, which typically includes refunds and parts returned.

Focus of SupplyOn Problem Solver is communication of the problem to the supplier with the aim to resolve the problem and avoid it in the future. Particularly for problems with no obvious cause, the 8D methodology is frequently used. SupplyOn Problem Solver supports the complaint process between buying and selling companies, with special consideration of – but not restricted to - the 8D methodology. SupplyOn Problem Solver is a product that supports collaboration between Buy- and Sell-side customers when a problem with the delivered goods from a sell-side occurs. The goal is to efficiently communicate problems occurred, decide on immediate action steps to solve the problem, and improve the process, prevent, and avoid same or similar situations in the future by using, but not restricted to, 8D methodology is commonly and frequently used in automotive industry.

In case of a problem, the buying company issues a complaint. In this procedure, the quality notification is sent to the SupplyOn Problem Solver as a complaint containing a description of the problem, including any attached documents and information on the response required from the supplier, i.e. whether an 8D report is required and within what timeframe. If an 8D report is requested from the supplier, the buying company typically demands to report back the containment actions (step 3) within a certain period (usually 24 hours) and to close the 8D-report within a certain time frame.

A complaint in SupplyOn is structured according to the 8D principle:

1. D1 – Building a cross-functional team
2. D2 – Problem Description
3. D3 – Immediate Actions to quickly resolve the impacts of the problem (D3)
4. D4 – Root cause analysis to find the root cause of the problem (D4)
5. D5 – Choosing corrective actions (D5)

6. D6 – Implementing chosen corrective actions (D6)

7. D7 – Defining preventive actions in order to avoid the occurrence of the same of similar problem in the future (D7)

8. D8 – Closure/ 8D Report Evaluation – actions are implemented, and their effectiveness is confirmed

SupplyOn Problem Solver offers different request types for the complaint to a supplier:

- 8D Report
- 8D Report with general actions
- 8D Report with 8D report evaluation
- 8D Report Plus
- 8D Report Plus with 8D report evaluation
- Short Confirmation
- Short Confirmation with general actions

The SupplyOn Problem Solver supports the complaint process by making the steps transparent and uniformly documented for both sides and aims at recognizing the root causes and solve the problems sustainable.

The benefits include the following:

- Achieving a high closure rate for 8D reports and – due in part to the higher 8D content quality – ensure quality improvements and a lower rate of recurring errors.
- Higher process reliability and transparency on both sides.
- Standard company-wide process with shorter lead times.
- Reduce the amount of manual processing and can control the process from within your internal system.
- Information of a uniform structure forms the basis for a corporate knowledge database.

This handout serves as a reminder and does not claim to be complete. Therefore, not all steps are described in detail, but only individual points are highlighted.

2.2 Initial creation and general handling of complaints

2.2.1 Customer tab “Complaints” and Complaint List

As a buy-side user has chosen the Problem Solver service from the dropping menu, at first they are navigated to the starting page which shows a list of all complaints (in the Tab 'Complaints'). This complaint list includes all complaints that have been provided from the buying company. Further on, a user has access to the complaint, if the user is assigned to a group, which the complaint is assigned to. User groups are used to differentiate between different customer plants.

Complaints Tasks Act as substitute

ID, title, description, part number

only ongoing complaints only complaints of last year only complaints with write permission

Advanced Search Table profiles: SupplyOn default

ID	Title	Supplier	Customer plant	Part number	Status	Last D-step	Date	Changed on	Changed by
81733	Test	TIFS-Seller01	TI Asti		Open, Draft		3/18/2022	3/18/2022 4:04 PM CET	Aprin, Roman
81738	test complaint PCA	TIFS-Seller01	TI Asti		Open, New		3/18/2022	3/18/2022 1:31 PM CET	Name, Dummy
81744	test complaint PCA	TIFS-Seller01	TI Asti		Open, New		3/18/2022	3/18/2022 1:32 PM CET	Name, Dummy
81697	Defect Product	TIFS-Seller01	TI Asti		Open, Updated	D7	3/11/2022	3/11/2022 12:55 PM C.	Aprin, Roman
81673	PrSo	TIFS-Seller02	TI Asti		Open	D3	3/8/2022	3/11/2022 8:37 AM CET	Aprin, Roman
81675	Test report evaluation	TIFS-Seller02	TI Asti		Open, New		3/8/2022	3/8/2022 3:56 PM CET	Aprin, Roman
81654	Test Template_2	TIFS-Seller02	TI Asti		Open, Updated	D3	3/6/2022	3/6/2022 7:06 PM CET	Aprin, Roman
81665	Test Template_2	TIFS-Seller02	TI Asti		Open, New		3/6/2022	3/6/2022 7:10 PM CET	Aprin, Roman
81666	Test Template_3	TIFS-Seller02	TI Asti		Open, Updated	D4	3/6/2022	3/7/2022 2:26 PM CET	Aprin, Roman
81643	Test Template	TIFS-Seller02	TI Asti		Open, Updated	D3	3/4/2022	3/6/2022 6:46 PM CET	Aprin, Roman

30 Complaints Rows per page: 10 | Page: 1 of 3 | Next Last

Figure 1 Initiating the 8D process

The complaint is the information from the buying company provided to the supplier and comprises three main sections:

- Complaint
- Details
- Customer Contacts (Figure 2)

The “complaint” section provides the essential information about the supplier and describes the complaint in a few sentences. The customer can choose between response types 8D Report, 8D Report with 8D report evaluation and 8D Plus with or without report evaluation. Further customer specific detail can be provided in the “Details” section. The information provided in both areas can be read by the supplier, but not changed. In the “customer contacts” area, the person responsible for the complaint can be added. You can also decide whether the contact person should receive reminders or notifications. The last section 'History' is in the right upper corner, where all changes regarding the complaint, including the supplier response can be viewed.

Please enter a title: (81792)

Customer complaint Status and timeline

Complaint Collapse

Supplier:

Customer corporate group:

Customer plant: You are only assigned to this customer site. You cannot select another site.

Response type: 8D report Request 8D Plus Request 8D report evaluation

Title:

Description:

Details Expand

Customer contacts Collapse

Name:

Name	Phone	E-mail	Reminder	Notification
Aprin, Roman	258	roman.aprin@supplyon.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>

History

No history available.

Figure 2: Customer complaint tab

2.2.2 Customer tab “Status and Timeline”

The “Status and timeline” tab displays the current status and timeline of each 8D-step. The user can do further maintenance of data, if the complaint is active (not closed, cancelled, or waiting for review).

This tab comprises two subsections:

- Status
- Dates of Responses





The most important information about the current progress of the complaint is summarized in the “Status” area. In addition, the status can be changed.

The screenshot shows the 'Status and timeline' tab for a customer complaint. The 'Status' section displays 'Open, Draft' and a dropdown menu with 'Please select the status' highlighted. Below this, the 'Dates for responses' section contains a table with columns for Step, Due date, Set by supplier, Submitted on, and Submitted by. The table lists steps from D1 to D7, with due dates and submission status. A 'Save and send to supplier' button is highlighted at the bottom.

Step	Due date	Set by supplier	Submitted on	Submitted by
● Basic Information (includes D1)		<input type="checkbox"/>		Not yet sent
■ D3 Containment actions (incl. D2)	3/19/2022 1:27 PM	<input type="checkbox"/>		Not yet sent
● D4 Root causes		<input type="checkbox"/>		Not yet sent
● D5 Chosen corrective actions	4/1/2022 2:27 PM	<input type="checkbox"/>		Not yet sent
● D6 Implemented Corrective Actions		<input type="checkbox"/>		Not yet sent
● D7 Preventive Actions		<input type="checkbox"/>		Not yet sent
● Status "Completed by supplier"		<input type="checkbox"/>		Not yet sent
● Status "Closed by supplier"		<input type="checkbox"/>		Not yet sent

Figure 3: Status and timeline tab

In a "Dates for responses" section there is an indicator next to each Step (shown in the table below) that indicates the status of the respective step.

	Inactive
	Section Submitted
	24 hours before deadline is reached
	Section deadline overdue

Status changes can be done by supplier and customer.

Available Customer complaint status

- “Open by Customer”

This is the initial status set automatically by Problem Solver, when the complaint is created by the customer. The customer can also reset a complaint from another status to “Open”, e.g. in order to re-open a complaint already closed, if rework is necessary.

- “Closed by Customer”

No additional activities are required regarding this item from the customer’s perspective. The item cannot be changed by the supplier.

- “Cancelled”

Status “Cancelled” has similar functionality as “Closed by Customer”. However, it carries a different meaning. (Cancelled would be used, for example, if a complaint has been sent by error.)

- “Rejected by Customer”

The customer did not agree to the supplier response. The supplier can edit further information and change already provided information on item level.

Supplier complaint status

- “Rejected by Supplier”

In minor cases the supplier does not agree with the customer notification in general. If supported by the customer the supplier can indicate this by rejecting the complaint. No changes are allowed by the supplier after setting the status. To do changes, the buying company needs to set the status to “Open” first.

- “Complete by Supplier”

The supplier sets status “Complete by Supplier” after he has entered all required information (steps D1 – D7, including basic information). He cannot make any more changes. The actual implementation or validation of actions are exceptions here. The supplier can add attachments and change the people involved.

- “Closed by Supplier”

The supplier can set this status when the 8D report has been completed and all actions set up have been implemented and validated. He can no longer change anything on the complaint.

After pressing the “Save and send to supplier”-Button on the customer side the supplier (Customer Responsible) is notified via e-mail. The Customer Responsible can be found by clicking on the supplier search button (Figure 4). They will be selected by the supplier side and are responsible for the complaint.

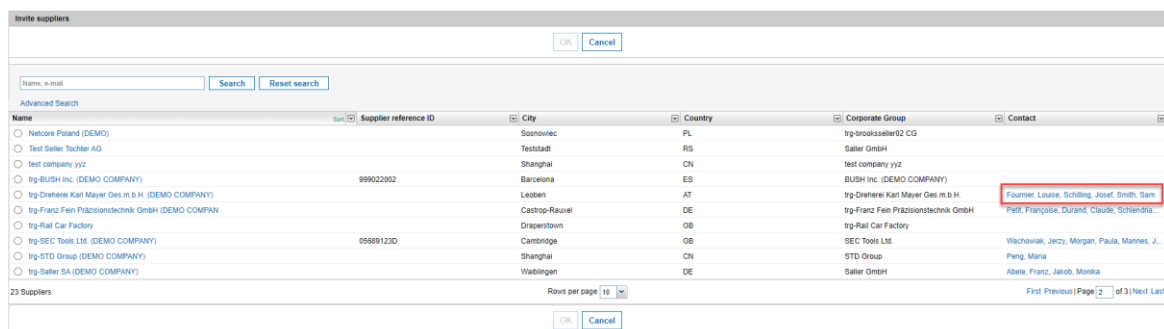


Figure 4: Find customer responsible

3 Supplier 8D-Problem Solving Process in SupplyOn ProSo Service

Once a supplier has logged in on the SupplyOn Platform and navigated to the ProblemSolver service via the direct link on the starting page or by simply selecting it from the “SupplyOn Services” menu list, they will be taken to the complaint Inbox (Figure 5).

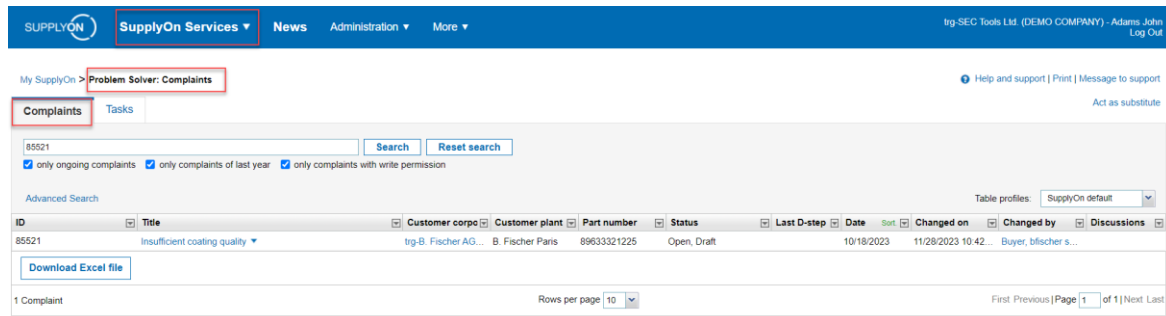


Figure 5 Landing Tab "Complaint Inbox"

The second tab on the ProblemSolver landing page is the "Tasks" overview (Figure 6) and aids in the identification of open and pending actions.

This overview displays **two information clusters**:

- task-specific information in the left columns (Figure 6 in blue)
- complaint-related information in the columns on the right (Figure 6 in yellow).

The **task-specific** information include:

- "Task type": which identifies the category of the essential actions that must be completed in the 8D process.
- explicit "Task name": which indicates which component of the 8D it belongs to.
- "Task status": Closed, waiting, Open.
- "Due date": which indicates the date when this task is due.
- "End date": Explicit for this action.
- "Responsible": Responsible for this action.

The **complaint information** displays the necessary matching information to clearly identify which complaint the action is about. Such as the:

- "Complaint Title": Shows the title of the respective complaint.
- "ID": Identifies the correct matching ID of the respective complaint.
- "Customer": Clarifies the customer who sends the complaint.

My SupplyOn > **Problem Solver: Tasks** Help and support | Print | Message to support

Complaints **Tasks** Act as substitute

Task title, description, responsible

Only open tasks

Advanced Search Table profiles: SupplyOn default

Task type	Task name	Task status	Due date	End date	Responsible	Complaint title	ID	Customer
Submit response	Stalo "Redatto dal fornito...	Open	12/1/2017 12:59 AM JST		Boss, Bob	Scratched Surface	32028	trg-B Fischer AG (DEM...
Submit response	D6 Implemented Correct...	Open	12/9/2017 12:59 AM JST		Black, Peter	Durchmesser nicht i o	32078	trg-B Fischer AG (DEM...
D7 action	Preventive Action 1	Open	10/1/2018 5:59 AM JST		Baum, Markus	Box broken	32725	trg-B Fischer AG (DEM...
Submit response	D7 Preventive Actions	Open	11/15/2019 4:56 PM JST			damaged packing3	34967	trg-B Fischer AG (DEM...
Submit response	D3 初期対応準備(包括 D2)	Open	11/19/2021 7:00 AM JST			Blade 2-111-R44 Pin hol...	49482	trg-B Fischer AG (DEM...
Submit response	D7 定期準備	Open	12/1/2021 5:22 PM JST			Blade 2-111-R44 Pin hol...	49482	trg-B Fischer AG (DEM...
Submit response	D7 Preventive Actions	Open	5/6/2022 10:48 PM JST		Nash, Julia	scratch on surface	56219	trg-B Fischer AG (DEM...
Submit response	D4 Root causes	Open	8/17/2022 6:59 AM JST		Xiao, Ying	Transformer movement L...	61409	trg-B Fischer AG (DEM...
Submit response	D5 Chosen corrective a...	Open	8/17/2022 6:59 AM JST		Xiao, Ying	Transformer movement L...	61409	trg-B Fischer AG (DEM...
Submit response	D6 Implemented Correct...	Open	8/17/2022 6:59 AM JST		Xiao, Ying	Transformer movement L...	61409	trg-B Fischer AG (DEM...

51 Task Rows per page: 10 First Previous Page 1 of 6 Next Last

Figure 6 "Tasks" Tab

By simply clicking on the task name, the corresponding complaint opens and directs to this task.

3.1 Customer Complaint Tab

The first tab, "Customer Complaint" (Figure 7), displays the customer's details. This tab contains three expandable sections. In addition to basic details about the customer, site or contacts, you will also find information about the complaint. The "Customer Contacts" section lists the contacts on the customer's site. You will also see any additional email recipients selected by the customer.

Customer complaint

Complaint

Details

Customer contacts

Customer corporate group:	Buyer, bfischer.schuster	demo-scenario@supplyon.com	258
	Gabel, Elke	regina.schmitz@supplyon.com	258

Figure 7 Content Overview "Customer Complaint" Tab

In the complaint details you can find a "title", "description", what kind of response the customer expects, as well as a "processing note" for the complaint (Figure 8). The "details" area below gives more information about the specific defective part including "complaint date" and "appearance dates", "part information" and "quantities". It is also possible to attach files to clarify the problem (Figure 8).

My SupplyOn > Problem Solver: Complaints > Insufficient coating quality (85521): Customer complaint

Insufficient coating quality (85521) (Draft)

Save and submit to customer | Save as draft | Cancel | More ▾

Customer complaint | **Supplier response** | Status and timeline

Complaint Collapse IT

Customer corporate group: trg-B. Fischer AG (DEMO COMPANY)
 Customer plant: B. Fischer Paris
 Supplier: trg-SEC Tools Ltd. (DEMO COMPANY)
 Title: Insufficient coating quality
 Description: Engine cover coating quality is insufficient due to inclusions and skip-plating on the surface.
 Part number: 8963321225
 Part number description: Engine cover, Model 6Xs, Sport ed., black
 Response type: 8D Plus
 Processing Note: Expand
 1. Immediate spare parts delivery to ensure raw material stocks and production capability
 2. Correcting of defective part as soon as possible
 3. If there are any parts currently in transit, you shall inform Fischer Supplier Quality Engineering Department about the quantity of parts in transit

Details Collapse IT

ID:	85521	Type:	0 km
System ID:	664522	Complaint date:	10/18/2023
Item number:	98	Appearance date:	10/18/2023
Non-conf. report no.:	11719866646	Severity:	6
Recurrence indicator:	Yes		
Part information			
Part number:	8963321225	Part name:	Engine cover, Model 6Xs, Sport ed.
Part index:		Production date (cust.):	10/11/2023
Serial number:	982331	Batch number:	99841
Commodity:		Commodity descr.:	
Quantities			
Complaint quantity:	1 each	PPM relevant qty.:	1 each
Delivery quantity:	2 each	Delivery note:	7748
Return delivery quantity:	1 each		
Attachments:	Skip-plating-without-NAg-activation.png (187 KB); Details		

Figure 8 “Customer Complaint” Tab: Complaint and Details

The last section contains “customer contact” information (Figure 9). Responsible staff and additional email recipients selected by the customer are displayed in this section.

Customer contacts Collapse IT

Customer corporate group:	Buyer, bfischer.schuster	demo-scenario@supplyon.com	258
	Gabel, Elke	regina.schmitz@supplyon.com	258

Figure 9 “Customer contacts”

After sending the complaint to the customer a new tab “Supplier response” will appear (Figure 3). All 8D steps can be implemented here by the supplier.

PrSo (81672) TI Fluid Systems

Save and submit to customer | Save as draft | Cancel | More ▾

Customer complaint | **Supplier response** | Status and timeline

Basic data	Expand	IT
Supplier-internal data	Expand	IT
D1 Team	Expand	IT
D2: Problem description	Expand	IT
D3: Containment actions	Expand	IT
D4: Root causes	Expand	IT
D5: Chosen corrective actions	Expand	IT
D6 Implemented Corrective Actions	Expand	IT
D7 Preventive Actions	Expand	IT
D8: Closure	Collapse	IT

The 8D report has not been closed yet.

History

- Customer corporate group (11/03/2022 08:37 CET): Sent with status "Open"
- Roman Apin (11/03/2022 08:36 CET): Sent with status "Rejected by supplier"
- Customer corporate group (11/03/2022 08:32 CET): Sent with status "Rejected by customer"
- Customer corporate group (08/03/2022 07:39 CET): Complaint created with status "Open"

Figure 10: Overview of supplier view tab

3.2 Supplier Response Tab

The second tab, "Supplier Response", is the main tab as this is where suppliers complete the 8D process steps (Figure 11Figure 1). It consists of 10 sub-sections, two superordinate, more general ones and the 8 sections containing each one steps of the 8D-problem solving method. The individual components are described in more detail below.

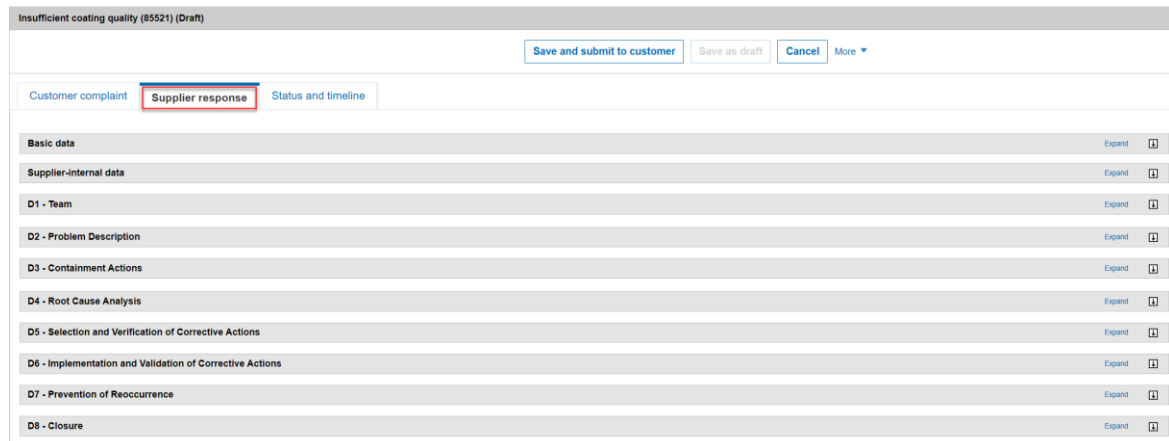


Figure 11 Overview "Supplier Response" Tab

Further functions can be opened by clicking on the "More" link found at the top of the "Supplier Response" tab (Figure 12).

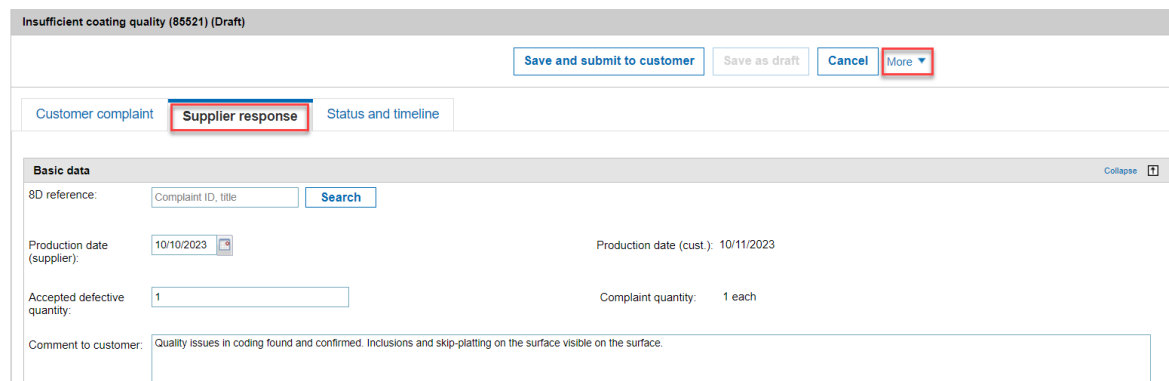


Figure 12 Further Functions "More"

The menu shows four further options including "Download PDF file", "Reject complaint", "Download complaint as XML file" and "Upload 8D report as XML file" (Figure 13). Table 1 provides a more detailed explanation of the other options that are available in more detail.

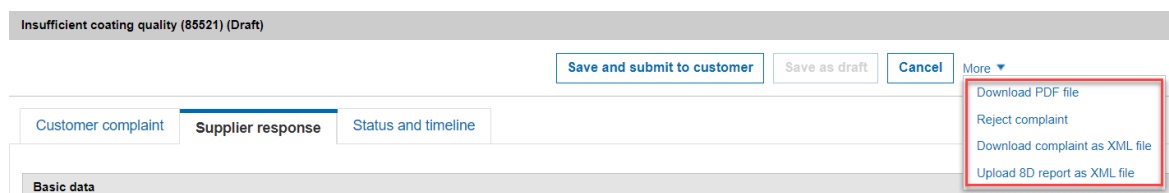


Figure 13 Further Options

Option	Description
Download PDF file	Generate PDF file from the current complaint/supplier response (8D report). Selection of which information the PDF file must contain via the menu.
Reject complaint	<p>Enter the reason for rejecting in the following window.</p> <p>If "Save and reject complaint" is send to the buyer the complaint is stored in the "Rejected by supplier" status but it is not closed until customer's review and feedback.</p> <p>A D3 containment action is automatically generated with the rejection by the supplier. You can no longer process rejected complaints. If the customer does not work with the "Rejected by supplier" status (e.g. Bosch), the status is not set.</p>
Download complaint as XML file	Suppliers can download their customers' complaint data as an XML file and save it on their computer.
Download 8D report as XML file	The download only contains the last data sent to the customer.
Upload 8D report as XML file	Selection of the file from your computer.

Table 1 Download Options

3.2.1 Basic Data

The subsection “*Basic data*” allows supplier to provide information, like production date and a comment to the customer (Figure 14).

Figure 14 Basic Data

The first field of this area is the “*8D reference*”. This is used to select and refer to other closed complaints. A complaint ID or title can be entered in the search bar and a new screen will open showing matching complaints (Figure 15). It is also possible to click on the search button without entering anything, which will display all the complaints that may be relevant.

ID	Title	Customer corporate gro	Customer plant	Part number	Status	Date	Changed on	Changed by
67595	Dimensional deviation/尺寸超差	tg-B. Fischer AG (DEMO ...	B. Fischer Italia S.p.A.		Closed by customer	12/16/2022	10/11/2023 8:16 PM JST	Buyer, bfischer.schuster
61456	Broken Part	tg-B. Fischer AG (DEMO ...	B. Fischer Mexico S.A. de ...		Closed by supplier	8/17/2022	8/17/2022 6:17 PM JST	Qu, pinpin
61460	10% of the delivery goods is broken	tg-B. Fischer AG (DEMO ...	B. Fischer Italia S.p.A.	ZBM79W	Open	8/17/2022	8/18/2022 12:28 PM JST	Qu, pinpin
42467	broken tire	tg-B. Fischer AG (DEMO ...	B. Fischer Italia S.p.A.	456	Closed by customer	6/22/2021	6/22/2021 6:26 PM JST	Zhang, Xiaowei
41075	cable broken	tg-B. Fischer AG (DEMO ...	B. Fischer Italia S.p.A.		Closed by customer	5/21/2021	6/22/2021 6:42 PM JST	Zhang, Xiaowei
40652	8D Report with broken parts	tg-B. Fischer AG (DEMO ...	B. Fischer Mexico S.A. de ...	M9872	Open, Updated	5/12/2021	5/14/2021 12:21 PM JST	Zhang, Xiaowei
35340	cable broken	tg-B. Fischer AG (DEMO ...	B. Fischer Italia S.p.A.		Closed by supplier	2/27/2020	2/27/2020 10:11 AM JST	Qu, Pinpin
34381	Damaged electrodes	tg-B. Fischer AG (DEMO ...	B. Fischer Mexico S.A. de ...	47897	Open, Draft	5/2/2019	5/2/2019 6:22 PM JST	Adams, John
34343	Complaints	tg-B. Fischer AG (DEMO ...	B. Fischer Italia S.p.A.	P001	Completed by supplier	4/9/2019	10/24/2019 6:06 PM JST	Qu, Pinpin

Figure 15 List of referable 8D-Complaints

If one complaint is selected, there is a hyperlink which refers to the specific complaint (Figure 16). You can click on it and the complaint opens.

Basic data Collapse

8D reference: Broken Part (61456) Delete 8D reference

Production date (Supplier): Production date (cust.): 10/11/2023

Accepted defective quantity: Complaint quantity: 1 each

Comment to customer:

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Figure 16 "8D-Reference"

Referencing an 8D Report

Your customer might allow the referencing of an existing 8D report instead of creating a new 8D report. A requirement for this is that an 8D report is available for the same complaint. In this case you can either enter the complaint number or select process from a list.

It is only possible to reference an 8D report if it

- refers to a complaint of the same customer,
- has been edited up to at least step D4 and has been sent to the customer,
- is not in the "Cancelled" or "Rejected by supplier" status,
- itself does not refer to another 8D report.

1. Closing a **referenced** 8D report by the **supplier**:

→ If the supplier sets the referenced 8D report to the "Completed by supplier" status or "Closed by supplier" status, this also happens automatically for all referenced 8D reports. The customer therefore receives the response from the supplier that the referencing and the referenced reports have been closed.

2. Closing a **referenced** 8D report by the **customer**:

→ If your customer has closed ("Closed by customer") or cancelled a referenced 8D report, the status of the referencing 8D report stays unchanged. Its status must be closed (or cancelled if applicable) separately by the customer.

3. Closing a **referencing** 8D report by the **customer**

→ If your customer has closed ("Closed by customer") or cancelled an 8D report which references another 8D report, a copy of the 8D report is created. The reference is automatically removed by Problem Solver.

4. Re-opening a **referenced** 8D report by the **customer**

→ If your customer changes the status of a closed, referenced 8D report back to "Open" (re-open for re-editing), the reference is automatically removed by Problem Solver, a copy of the 8D report is inserted into referencing 8D report.

If the customer has specified the production date and quantity of the affected parts, this is displayed on the right and cannot be changed. To confirm the defective quantities, the supplier must enter the relevant data on the left (Figure 17).

The screenshot shows the 'Basic data' section of an 8D report. At the top, it displays '8D reference: Broken Part (61456)' with a 'Delete 8D reference' button. Below this, there are two columns of input fields. The left column contains 'Production date (supplier): 10/10/2023' and 'Accepted defective quantity: 1'. The right column contains 'Production date (cust.): 10/11/2023' and 'Complaint quantity: 1 each'. A large text area for 'Comment to customer:' contains the text: 'Quality issues in coding found and confirmed. Inclusions and skip-plating on the surface visible on the surface.' At the bottom, there is an 'Attachments' section with the text 'No attachments were uploaded.' and links for 'Upload' and 'Manage attachments', along with the instruction 'CTRL key for multiple upload.'

Figure 17 Complaint and Accepted Quantities

The last field in the basic data is the "comment to customer" (Figure 18). It is used to communicate about the issue and quick comment, declaration, or additional information to the acceptance of the complaint to the customer.

This screenshot is identical to Figure 17, showing the 'Basic data' section. A red rectangular box highlights the 'Comment to customer' text area, which contains the text: 'Quality issues in coding found and confirmed. Inclusions and skip-plating on the surface visible on the surface.'

Figure 18 "Comment to Customer"

The supplier can upload additional files and images that are relevant for the 8D report in the "Attachments" area. Please note that the customer only allows certain file formats and that you can also add attachments to individual elements of the 8D report (e.g. actions).

3.2.2 Supplier-Internal Data

The "Supplier-internal data" is only visible to the supplier and gives him the possibility to add e.g. internal notes (Figure 19). The internal supplier fields are standardized for all customers who use our application.

Supplier-internal data Collapse

Internal reference no: Internal Part Number:

Internal Notes: Internal Date:

Figure 19 “Supplier-internal Data”

3.2.3 D1 – Team

In step D1, the 8D team is assembled, the key roles for solving the problem are identified and the responsibilities are assigned to the team members. The team should be cross-functional and have sufficient experience and diverse process and product knowledge to approach the problem from different angles. It is therefore important to clearly assign people and roles to the 8D members, not just functions or departments.

The team consists of the team leader, quality staff and other colleagues from different departments responsible for supporting, analyzing, and preventing the problem. It is important to select an experienced **leader** with a good understanding of the problem who is reporting to upper management. For the role of the, a person from upper management with decision authority should be identified to ensure that the team has all the resources it needs and to act as an intermediary between the team and management. To appoint a “*team leader*”, simply tick the team member's radio button in the corresponding column (Figure 20). Please note, that one member per 8D team must be assigned to the role of the “*team leader*” so that they can be identified when responding to the customer.

D1 - Team Collapse

[Add team member](#)

Name	Position	E-mail	Authorization	Team leader
Adams, John	Logistics	demo-scenario@supplyon.com	Write	<input checked="" type="radio"/>

Figure 20 “Team leader”

When the link “*Add team member*” is clicked a new tab with contact opens (Figure 21):

D1 - Team Collapse

[Add team member](#)

Name	Position	E-mail	Authorization	Team leader
Adams, John	Logistics	demo-scenario@supplyon.com	Write	<input type="radio"/>

Figure 21 “Add team member”

Team members can be added either from the list of existing (registered) contacts, or new (unregistered) contacts by clicking the “*Add unregistered team member*” link when searching for team members (Figure 22).

Select team member

Team member name, e-mail [Add unregistered team member](#)

Name	Sort	Position	Department	E-mail	Company	Registered
<input checked="" type="checkbox"/> Adams, John		Logistics	Sales	demo-scenario@supplyon.com	trg-SEC Tools Ltd. (DEMO COMP...	Yes
<input type="checkbox"/> Adams, John		Logistics	Sales	demo-scenario@supplyon.com	trg-SEC Tools Ltd. (DEMO COMP...	Yes
<input type="checkbox"/> Adams, Mary		Logistics	Sales	demo-scenario@supplyon.com	trg-SEC Tools Ltd. (DEMO COMP...	Yes
<input checked="" type="checkbox"/> Bacon, Kate				demo-scenario@supplyon.com	trg-SEC Tools Ltd. (DEMO COMP...	Yes

Figure 22: Add team registered or unregistered member

If an unregistered employee is to be assigned, clicking on the "Add an unregistered member" link (Figure 23) will bring up a pop-up window where you can enter relevant information about the unregistered team members and appoint them as a new member of the 8D team (Figure 23). It is used to create the opportunity to set up a cross-functional team and to involve members of other departments that do not yet use SupplyOn's quality tools. The unregistered team member will not receive access to the ProblemSolver. This is solely a documentation function to be able to include the entire problem-solving team, even if they do not have access to the platform. The Fields indicated with the asterisk in this mask are mandatory (Figure 23):

Add team member

You can set up team members here and add them to your favorites list. Please ensure that team members do not have access to Problem Solver.

First name*:

Surname*:

Company:

Department:

Position:

Contact information

Phone:

Fax:

Mobile phone:

E-mail:

Address

Street:

Zip code:

City:

State/province:

Country:

Figure 23: "Add unregistered team member"

In the "Authorization" column, suppliers can define the authorization of a team member and select "Read" or "Write" for this specific complaint (Figure 24). If a member only has reading access to a complaint, they will not be able to make any changes. If this is the case, please contact another member of the team who has write access, or the customer manager who handles that customer's complaints. They will be able to adjust your access options.

Name	Position	E-mail	Authorization	Team leader
Adams, John	Logistics	demo-scenario@supplyon.com	Write	<input checked="" type="radio"/>
Bacon, Kate		demo-scenario@supplyon.com	Write	<input type="radio"/>
Nash, Julia	Logistic Expert	demo-scenario@supplyon.com	Read	<input type="radio"/>
			Write	

Figure 24: "Authorization" options

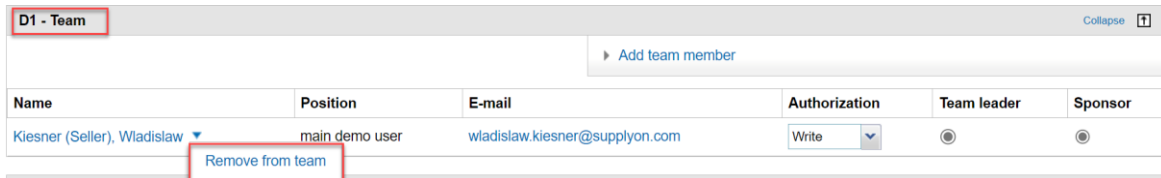
Note, however, that if a team member is not registered with SupplyOn, the entry will be "No access" (Figure 25).



Name	Position	E-mail	Authorization	Team leader
Morgan, Paula	übergeben	regina.schmitz@supplyon.com	Write	<input checked="" type="radio"/>
Black, Peter			No access	<input type="radio"/>

Figure 25 "Authorization No Access"

To remove a person who has been assigned to a team, click on the menu icon next to their name and select "Remove from team" (Figure 26). Please note that you cannot delete team members if they have already been assigned to an action.

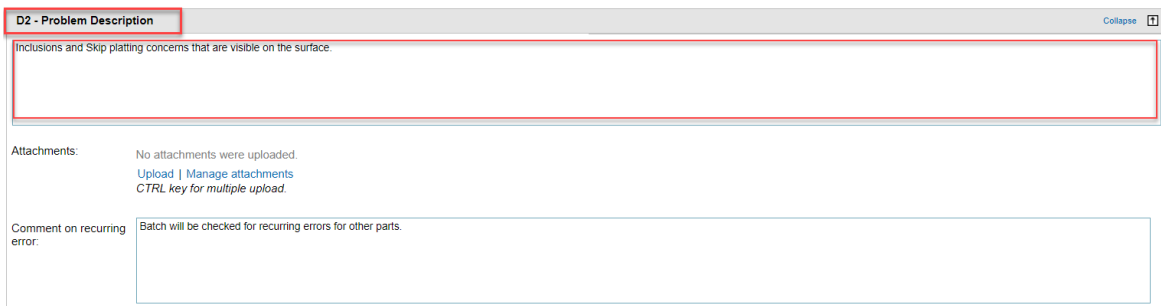


Name	Position	E-mail	Authorization	Team leader	Sponsor
Kiesner (Seller), Wladislaw	main demo user	wladislaw.kiesner@supplyon.com	Write	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Figure 26: "Remove from team"

3.2.4 D2 – Problem Description

In Step D2, the supplier must define the problem in "Problem Description" as precisely as possible to identify the source of the problem (Figure 27). This is a mandatory field. The detailed description should include all relevant information and describe details in measurable terms (e.g. exact number, dimensions, part number). This is the basis for all subsequent 8D process steps, so the description must be specific and easy to understand, using terms that are understood by all participants. Therefore, the supplier should re-describe the problem in his own words and clarify the objectives and a "correct" problem description to identify root causes. This may include an Is/Is-Not-Analysis (see 3.3.1 VDA Features p.40).



D2 - Problem Description

Inclusions and Skip plating concerns that are visible on the surface

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Comment on recurring error: Batch will be checked for recurring errors for other parts.

Figure 27: Step D2 – "Problem description" field

In step D2 it is possible to add an "attachment" (Figure 28). For example, it is useful to include a flowchart of the process and identify critical process steps to make it understandable to all, so that even if not everyone is familiar with the process, they will understand the core issue. It is also possible to include a high-level project plan for better planning and overview.

Figure 28: "Attachment" Area

The purpose of the "Comment on Recurring Error" field is to indicate that the supplier is aware of recurring errors so that the likelihood of other problems can be checked, and an initial assessment of the situation can be made (Figure 29).

Figure 29: "Comment on Recurring Error"

3.2.5 D3 – [Interim] Containment Actions

Purpose of (Interim) Containment Actions is a temporary fix that contains the issue until a permanent solution is developed and implemented. These aim at quickly isolate the effects of the problem from affecting internal and external customers.

The user can define containment actions by clicking on "Add action" (Figure 30).

	Title	Status	Effect	Planned implementation	Actual implementation
●	Regular examinations and quality alerts ▾	Draft	100	10/22/2023 11:59 PM JST	10/18/2023 11:59 PM JST
●	Return process ▾	Draft	100	10/18/2023 11:59 PM JST	10/18/2023 11:59 PM JST

Figure 30: "Add Action"

When text link "Add action" is clicked, there is a new tab, where supplier can "add a D3 action" (Figure 31). The supplier here defines potential interim containment actions temporarily actions that prevent the problem from causing further harm or inconvenience while the root cause is investigated.

Add D3 action

Title*:

Description*:

Status: Draft

Responsible*: [Define D1 team member](#)

Effect*: %

Validation description:

Planned implementation*:

Actual implementation:

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Internal action (not visible for customer)

Figure 31: "Add Action" Tab

All fields with an asterisk are mandatory, thus the supplier needs to provide information on the action "title" (max 40 Characters) and "description", the "responsible" D1-Team member, "effectiveness", and the "planned implementation date" which are mandatory fields (Figure 32).

Change D3 action

Title*:

Description*:

Status: Draft

Responsible*: [Define D1 team member](#)

Effect*: %

Validation description:

Planned implementation*:

Actual implementation:

Item number: 9000

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Internal action (not visible for customer)

Figure 32: Mandatory Fields

It is important to verify the effectiveness of possible actions. After assessing the potential effect, the mandatory percentage value must be greater than 0 and less than or equal to 100. Please note that the "Actual Implementation" date must be today or in the past.

Furthermore, the supplier has an option to mark the action “*internal*” (Figure 33), which basically means that this action won't be visible to the customer (included PDF-report).

Change D3 action

Title*:

Description*:

Status: Draft

Responsible*: Define D1 team member

Effect*: %

Validation description:

Planned implementation*:

Actual implementation:

Item number: 9000

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Internal action (not visible for customer)

Figure 33: “Internal Action”

If there is at least one D3 action with an actual implementation date filled in, an additional link will be displayed as “Add correct parts delivery” (Figure 34).

D3 - Containment Actions Collapse

Due date for step set by Customer corporate group: 10/26/2023 9:21 PM JST

Add action
Add delivery of correct parts (clean date) - based on D3 actions

	Title	Status	Effect	Planned implementation	Actual implementation
●	Regular examinations and quality alerts	Draft	100	10/22/2023 11:59 PM JST	10/18/2023 11:59 PM JST
●	Return process	Draft	100	10/18/2023 11:59 PM JST	10/18/2023 11:59 PM JST

Figure 34: “Add delivery of corrective parts”

Clicking on this will open a new window where the supplier can enter the “correct parts delivery date and time” and get “Help and Support” using the displayed hyperlink (Figure 35).

Correct parts delivered on

[Help and support](#)

Please enter the date by when the first correct parts will be delivered to the customer.

Date:

Figure 35: “Corrective parts delivered” window

Please note, the Complaint can only be sent to the customer once at least the Basic Data section has been completed and the team has been defined.

3.2.6 D4 – Root Cause Analysis and Escape Points

In the D4 step "Root Cause Analysis", several tools are available to analyze the core problem that caused the complaint, e.g. Ishikawa or 5-Why analysis (Figure 36). This detailed, data-driven process ensures that the most important root causes are identified. In addition, the structured procedures encourage the team to understand why it happened (Root Cause, SO Term: Occurrence), but also why it was not detected and contained, but slipped through (Escape point, SO Term: Non-Detection) and what needs to be fixed. Root cause analysis requires a thorough investigation to identify underlying causes. It is a long-term process that demands a deep understanding of the issue at hand.

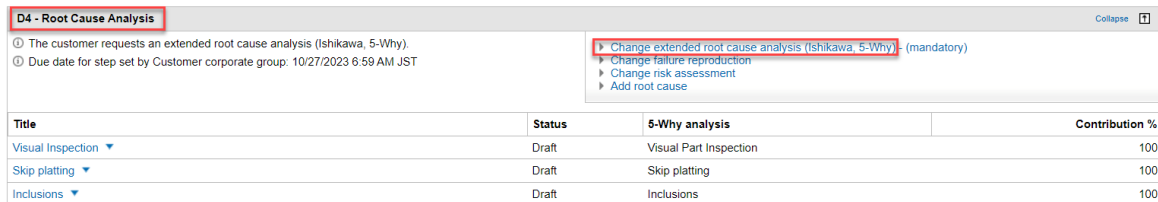


Figure 36: D4 – “Root Cause Analysis”

The **Ishikawa model** failure analysis that aims to uncover the key relationships between variables and identify potential causes to gain further insight into process behavior.

The root causes can be classified into two main types of “Non-Detection” and “Occurrence”, which both have their own tab in the Ishikawa Analysis window (Figure 37). Any number of lines can be added to the six categories of “man”, “material”, “machine”, “method”, “environment”, and “management”, as well as a person to “verify” them.

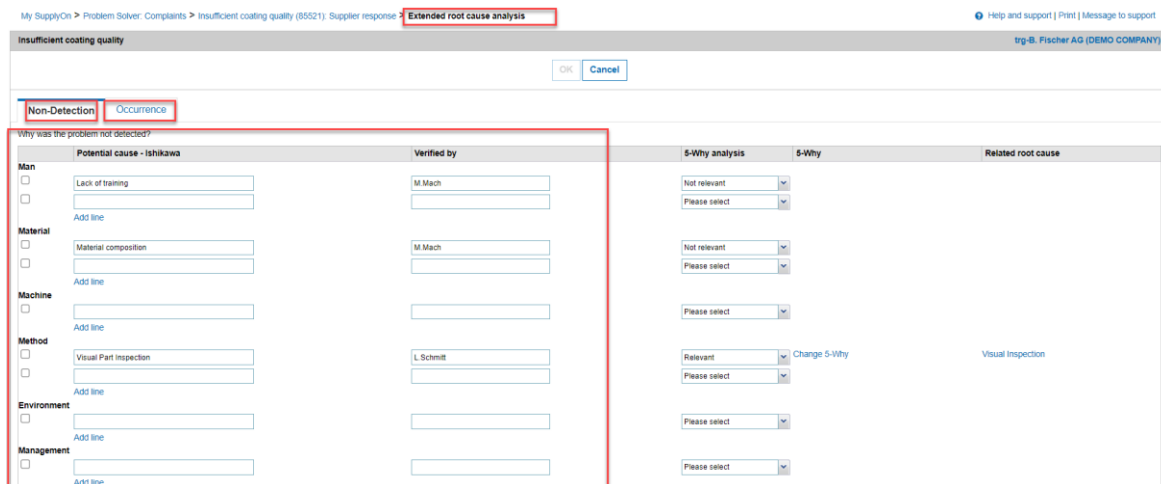


Figure 37: Ishikawa Analysis Overview

The potential causes identified by the **Ishikawa** diagram should highlight the core problem. Each root cause can be enriched with a **5-why analysis** (Figure 38). The aim of the “5-Why-Analysis” is to find the root cause of the problem by asking questions step by step. To do this, open the “5-Why Analysis” area in ProSo, enter a possible root cause and ask “Why has the problem occurred?” as many times as it makes sense.

Usually, the last why you have answered is the actual root cause, which you can copy to the root cause item. The text of the last why is automatically transferred as a description in the D4 root cause. The tools are used to collect additional data for deeper insights and to narrow down the list to a few, most likely root causes.

The screenshot shows the 'Extended root cause analysis' window for 'Insufficient coating quality'. It features a table for the Ishikawa diagram with columns for 'Potential cause - Ishikawa', 'Verified by', '5-Why analysis', '5-Why', and 'Related root cause'. The '5-Why analysis' column contains a dropdown menu with options 'Not relevant' and 'Please select'. The '5-Why' column has a 'Change 5-Why' link. The 'Related root cause' column shows 'Visual Inspection'.

Figure 38: Additional "5-Why Analysis" in Ishikawa Diagram

The drop-down menu has two options which indicates whether the identified potential cause from the Ishikawa analysis is relevant as a root cause: "relevant" or "not relevant"

By marking a root cause as "relevant", a new hyperlink "Change/Add 5-Why" appears that opens a new window (Figure 39).

This screenshot is similar to Figure 38, but the '5-Why analysis' dropdown menu is now set to 'Relevant'. The 'Change 5-Why' link is highlighted with a red box, indicating it is active and clickable.

Figure 39: Adding a "5-Why Analysis"

The separate 5-Why window which opens is split into two sections that help in finding and documenting the process of "5-Why analysis" (Figure 40).

The screenshot shows a dialog box titled 'Change 5-Why analysis'. It contains a text area with the instruction 'Identify the root cause by repeatedly questioning of the potential cause.' Below the text area is a 'Change Root cause' button. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Figure 40: "5-Why Analysis"

The potential cause shown at the top is copied from the Ishikawa analysis. By repeatedly asking "Why" and entering the answer on a line, the root cause of a problem can be identified (Figure 41Figure 40Figure 42). Please note that the "5-Why analysis" does not always require exactly five "Whys". Depending on the situation, more or fewer questions may be necessary.

Change 5-Why analysis

Identify the root cause by repeatedly questioning of the potential cause.

Potential cause*:

1. Why*	Parts were verified on final inspection but it defective surface was not noticed and the part was delivered with defect coating.
2. Why	Coating inspection process was not detected in the inspection process. is a visual inspection.
3. Why	The inspection type is a visual inspection.
4. Why	The visual inspection is subject to error due to the human factor.
5. Why	Visual inspection is not 100% effective.

Figure 41: "Change 5-Why Analysis"

The final "Why" answer is then automatically displayed as the "description" for the D4 root cause item in the second sub-section (Figure 42Figure 43).

Change 5-Why analysis

Identify the root cause by repeatedly questioning of the potential cause.

Potential cause*: Set by Ishikawa analysis (Non-Detection > Method)

1. Why*

2. Why

3. Why

4. Why

5. Why

Add line

Change Root cause Last entered "Why" automatically copied

Failure cause category (level 1)*:

Failure cause category (level 2)*:

Failure cause category (level 3)*:

Title*:

Description*:

Drill-Deep category: Set by Ishikawa analysis

Root cause type:

Contribution*: %

Status:

Item number:

Figure 42: "Root Cause Analysis" and copied "Description".

The second sub-section starts with four lines that aim at giving a precise description, using predefined drop-down options to categorize the cause and the so-called "Drill Deep Category" is defined by the previous Ishikawa analysis and set automatically (Figure 42). This step also requires selecting a "Cause Type", which has the options "Technical" and "Systemic". "Technical root causes" are at the operational level and result from the description of logical and functional relationships (cause-effect relationships). "Systemic root causes" relate to the Quality and Manufacturing Systems that cover the product and process.

In addition to root cause analysis, section D4 provides the option of performing a "Risk Assessment" and a "Failure Reproduction" (Figure 43).

Title	Status	5-Why analysis	Contribution %
Visual Inspection	Draft	Visual Part Inspection	100
Skip plating	Draft	Skip plating	100
Inclusions	Draft	Inclusions	100

Figure 43: "Failure Reproduction" and "Risk Assessment"

Completing the optional "Risk Assessment" allows the supplier to provide accurate information on any potentially erroneous batches and quantities sent to the customer, along with the exact extent of the error. To conduct a "risk assessment", confidently provide the necessary information on "production dates", "affected delivery dates", "quantity", and a clear "description" of the issue in the "risk assessment" pop-up (Figure 44).

Affected production date from	Affected production date to	Affected delivery date from	Affected delivery date to	Potentially affected quantity at customer	Unit	Description
10/1/2023	10/24/2023	10/12/2023	10/30/2023	500	each	

Figure 44: "Risk Assessment"

The "Failure Reproduction" window (Figure 45) contains information on whether the problem has been reproduced at the supplier's end. Please note that users assigned as responsible in this step cannot be removed, as attempting to do so will result in an error message upon submission.

Figure 45: "Failure Reproduction"

If customer has requested 8D plus report, supplier must provide mandatorily an "Ishikawa" and "5 Why analysis" in D4 as well as a "Drill-Wide analysis" in D7. This can be seen in the D4 section of the "supplier's preview", where on the left-hand side there is an indication that the customer has requested 8D Plus, and on the right-hand side next to the text link to "Enhanced Analysis" there is a marker saying "mandatory" (Figure 46). The analysis becomes **optional** when a standard 8D report is requested.

Title	Status	5-Why analysis	Contribution %
Visual Inspection	Draft	Visual Part Inspection	100
Skip plating	Draft	Skip plating	100
Inclusions	Draft	Inclusions	100

Figure 46: 8D-Plus indication (Extended, mandatory)

The overview displays two statuses for each root cause. The root cause is in status “Draft” (Figure 47), if it is initially created but not yet submitted, or the entire 8D report is saved as a draft, or any updates have been made to a root cause that has already been submitted to the customer.

The second status is “Submitted”, indicating that the step has already been handed over to the customer.

D4 - Root Cause Analysis Collapse			
The customer requests an extended root cause analysis (Ishikawa, 5-Why). Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST		Change extended root cause analysis (Ishikawa, 5-Why) - (mandatory) Change failure reproduction Change risk assessment Add root cause	
Title	Status	5-Why analysis	Contribution %
Visual Inspection	Draft	Visual Part Inspection	100
Skip plating	Draft	Skip plating	100
Inclusions	Draft	Inclusions	100

Figure 47: Root Cause "Status"

Only initially created root causes, in Status "Draft" can be deleted. Once a root cause has been submitted to the customer, it cannot be deleted, even if the customer updates it and the root cause reverts to "Draft" status (Figure 48).

D4: Root causes Collapse			
		Change enhanced root cause analysis(Ishikawa, 5-Why) Add failure reproduction Add risk assessment Add root cause	
Title	Status	5-Why analysis	
Root Cause 2	Submitted	Cause Detection	
Root Cause 1	Submitted	cause 1	
Root Cause 4	Draft	cause Detection 2	
Root Cause 3	Draft	cause 1.1	

Figure 48: "Root Cause Status"

3.2.7 D5 – Permanent Corrective Actions

Step D5 identifies permanent corrective actions that can remove the root causes and prevent the problem from ever happening again. The goal is to select and verify long-term actions to move from diagnosis to treatment and from insight to action to remove the root cause.

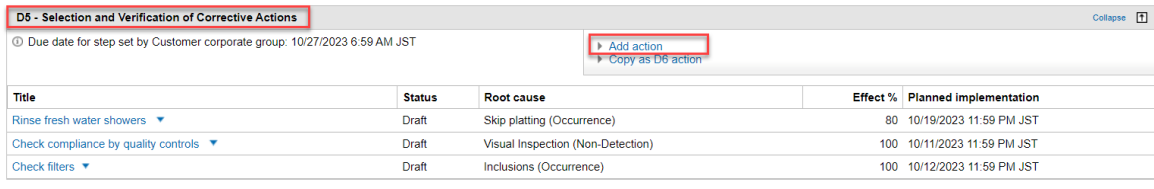
The chosen measures need to address a corresponding root cause defined in Step D4 to permanently correct the problem and eliminate the root cause (Figure 49).

D4 - Root Cause Analysis Collapse			
The customer requests an extended root cause analysis (Ishikawa, 5-Why). Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST		Change extended root cause analysis (Ishikawa, 5-Why) - (mandatory) Change failure reproduction Change risk assessment Add root cause	
Title	Status	5-Why analysis	Contribution %
Visual Inspection	Draft	Visual Part Inspection	100
Skip plating	Draft	Skip plating	100
Inclusions	Draft	Inclusions	100

D5 - Selection and Verification of Corrective Actions Collapse				
Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST		Add action Copy as D6 action		
Title	Status	Root cause	Effect %	Planned implementation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	80	10/19/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST

Figure 49: D5 – Chosen corrective actions that directly address the “root causes” identified in Step D4

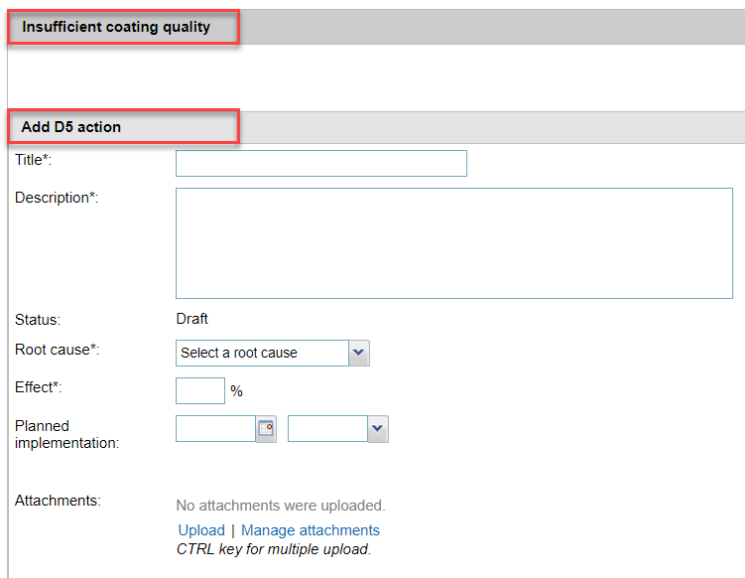
To add a new corrective action, a new window opens via the “*Add Action*” hyperlink, where all the required information can be entered (Figure 50).



Title	Status	Root cause	Effect %	Planned implementation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	80	10/19/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST

Figure 50: Hyperlink to “Add Action”

While “adding a new D5 action”, mandatory fields are marked with an * like the “*title*”, “*description*”, the “*root causes*” this action relates to and the expected impact (“*effect*”) of this action on the root cause in % (Figure 51). It is also possible to enter a “*planned implementation date*” and add “*attachments*”.



Add D5 action

Title*:

Description*:

Status: Draft

Root cause*:

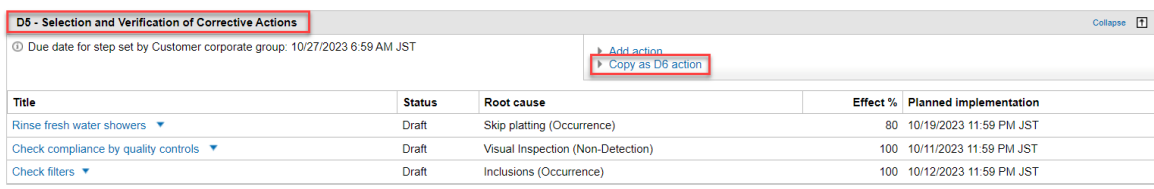
Effect*: %

Planned implementation:

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Figure 51: “Add D5 Action” to a specific root cause.

To copy the defined actions from D5 to D6 for subsequent implementation and validation activities, select the second hyperlink and choose the appropriate corrective action (Figure 52).



Title	Status	Root cause	Effect %	Planned implementation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	80	10/19/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST

Figure 52: “Copy function” of corrective actions from Step D5 to D6

3.2.8 D6 – Implement Corrective Actions

Step D6 practically applies the planning and analysis conducted in the previous steps and implements the best solutions.

Tasks of this step include the roll-out of corrective measures, the validation of effectiveness of solutions also including customers perspective by collecting feedback, monitoring the long-term effectiveness of implemented changes and the removal of any interim containment action.

To simplify the 8D Process and save time, the defined actions from D5 can easily be copied to D6 (Figure 53).

D5 - Selection and Verification of Corrective Actions

Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST

Title	Status	Root cause	Effect %	Planned implementation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	80	10/19/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST

D6 - Implementation and Validation of Corrective Actions

Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST

Title	Status	Root cause	Effect %	Planned	Actual	Validation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	100	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST	10/16/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST	10/10/2023 11:59 PM JST	10/10/2023 11:59 PM JST

Figure 53: "Copy of defined D5 actions to step D6"

To adjust an action or provide more information about the "implementation date" or "validation date", the corresponding hyperlink can be simply clicked on (Figure 54).

D6 - Implementation and Validation of Corrective Actions

Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST

Title	Status	Root cause	Effect %	Planned	Actual	Validation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	100	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST	10/16/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST	10/10/2023 11:59 PM JST	10/10/2023 11:59 PM JST

Figure 54: Open an action to adjust or add information

Clicking on the hyperlink will open a window where you can modify the information of the respective action and add more details (Figure 55).

Insufficient coating quality

Change D6 action

Title*:

Description*:

Status: Draft

Root cause*:

Responsible*: [Define D1 team member](#)

Planned implementation*:

Actual implementation:

Validation

Date:

Effect: %

Description:

Item number: 9010

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Figure 55: Separate window to change action details

D6 - Implementation and Validation of Corrective Actions Collapse

Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST

[Copy D5 action to D6](#)
 [Add internal D6 action](#)
↳ Add delivery of correct parts (clean date) - based on D6 actions
↳ Add cancellation of containment actions

Title	Status	Root cause	Effect %	Planned	Actual	Validation
● Rinse fresh water showers	Draft	Skip plating (Occurrence)	100	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST
● Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST	10/16/2023 11:59 PM JST	10/17/2023 11:59 PM JST
● Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST	10/10/2023 11:59 PM JST	10/10/2023 11:59 PM JST

Figure 56: Hyperlink for defining internal actions

In the separate window, all necessary information can be entered and the checkbox on the bottom that defines “internal actions” is automatically checked (Figure 57).

Insufficient coating quality

Add D6 action

Title*:

Description*:

Status: Draft

Root cause*:

Responsible*: Define D1 team member

Planned implementation*:

Actual implementation:

Validation

Date:

Effect: %

Description:

Attachments: No attachments were uploaded.
[Upload](#) | [Manage attachments](#)
 CTRL key for multiple upload.

Internal action (not visible for customer)

Figure 57: Definition of "Internal Actions"

Step 6 offers the opportunity to set a "delivery date" of corrective parts in a separate window (Figure 58).

D6 - Implementation and Validation of Corrective Actions Collapse

Due date for step set by Customer corporate group: 10/27/2023 6:59 AM JST

- Copy D5 action to D6
- Add internal D6 action
- Add delivery of correct parts (clean date) - based on D6 actions**
- Add cancellation of containment actions

Title	Status	Root cause	Effect %	Planned	Actual	Validation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	100	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST	10/16/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST	10/10/2023 11:59 PM JST	10/10/2023 11:59 PM JST

Figure 58 Setting a "delivery date" of corrective parts

In the separate mask a "date" can be entered when the first corrected parts will be delivered to the customer (Figure 59).

Correct parts delivered on Help and support

Please enter the date by when the first correct parts will be delivered to the customer.

Date:

Figure 59: Separate window to set a "delivery date"

The “Cancellation” tab in D6 allows for optional information on the cancellation of containment actions (Figure 60). This feature ensures the prevention of long-term failures by enabling the documentation of when D3 containment actions can be cancelled after D6 actions have been implemented.

Title	Status	Root cause	Effect %	Planned	Actual	Validation
Rinse fresh water showers	Draft	Skip plating (Occurrence)	100	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check compliance by quality controls	Draft	Visual Inspection (Non-Detection)	100	10/11/2023 11:59 PM JST	10/16/2023 11:59 PM JST	10/17/2023 11:59 PM JST
Check filters	Draft	Inclusions (Occurrence)	100	10/12/2023 11:59 PM JST	10/10/2023 11:59 PM JST	10/10/2023 11:59 PM JST

Figure 60: “Cancellation” documentation of containment actions set in D3

3.2.9 D7 – Prevention of Reoccurrence

Preventive actions remove causes for a potential problem and prevent it from ever happening. So, the goal of this step is to think about similar products and processes and possible applicability of the problem to other situations and its impacts.

D7 actions are proactive and aim to prevent future events. To prevent recurrence, necessary improvements in systems and processes must be identified. Preventive measures are established and decided upon as part of the tasks of step D7. To add an Activity, select “Add Action” hyperlink (Figure 61).

Title	Status	Planned implementation	Actual implementation
Update Failure Mode and Effects Analysis	Draft	10/8/2023 11:59 PM JST	10/8/2023 11:59 PM JST

Figure 61: D7 – Add Preventive Actions

Step 7 offers the opportunity to provide an additional “Drill-Wide Analysis” which is mandatory if the customer has requested an 8D-Plus (Figure 62). The Drill-Wide analysis supports in tracking solutions for the original problem for other sites, products, or lines. Areas that are relevant from both supplier point of view and the customer’s, such as sites or products, for which it is also relevant to implement the actions in question. Thus, the Drill-Wide analysis helps you here to “look beyond the periphery of the actual problem”.

Example: Problem = Error with blue pens.

1. Ask yourself the question to whether or not an error with "blue pens" can also occur with "red pens"?
2. If this is relevant, enter the product line in question and select the status in the dropdown menu → The status refers to all D3, D6 and D7 actions that have been created for the current problem (e.g, a D6 action could be defined such as "Align Machine").
3. Now specify whether or not this action has already been implemented and validated for another site. A comment must be entered if none of the entries was identified as relevant (status "N/A").

Title	Status	Planned implementation	Actual implementation
Update Failure Mode and Effects Analysis	Draft	10/8/2023 11:59 PM JST	10/8/2023 11:59 PM JST

Figure 62: Definition of a “Drill-Wide Analysis”

This analysis will address the bigger picture and transfer the lessons learned to other possibly affected areas. Any number of lines can be added to a plant, line, product and/or project. For each line one suitable status can be selected (Figure 63): “Not applicable”, “Completed and verified”, “Implemented, but not validated” or “In progress, not implemented”.

Further it is possible to add a comment and an attachment to the analysis.

Insufficient coating quality

OK Cancel

Add Drill-Wide analysis

Following considered actions: Plants, Lines, Products and / or Projects

Plants / Lines / Products / Projects

Add line

Comment (if not applicable):

Attachments: No attachments were uploaded.
Upload | Manage attachments

OK Cancel

Status

- Select status
- Select status
- Not applicable
- Completed and verified
- Implemented, but not validated
- In progress, not implemented

Figure 63: Separate “Drill-Wide Analysis”

3.2.10 D8 – Closure and Report Evaluation

The 8D report rating shows the quality of the content of an 8D report. Suppliers can rate and comment on the 8D steps they have performed according to predefined criteria and a customer-specific rating scheme.

You can navigate to the “evaluation” by clicking on the hyperlink displayed in D8 (Figure 64).

D8 - Closure

8D report evaluation

No 8D report evaluation exists.
The 8D report has not been closed yet.

Figure 64: D8 – “Closure”

The criteria and scoring scheme are defined by the customer and are the same for all complaints, ensuring comparability and long-term quality control (Figure 65). Each step can be scored separately by selecting one of three levels, which add up to a total score.

Handover for SupplyOn Service Problem Solver

insufficient coating quality		trg-B, Fischer AG (DEMO COMPANY)	
Please evaluate your 8D report based on the available categories.		OK	Reset entries
		Cancel	
		Expand all Collapse all	
Title	Answer	Pts.	Max. pts.
D1: Problem solving team	<input type="radio"/> Not good (0/5) - Minimum standard not reached <input type="radio"/> OK (4/5) - Champion named - Cross functional team - Champion contact data available <input type="radio"/> Very good (5/5) - Names and all functions of the cross functional team are available Comment:	Collapse	0
D2: Problem description	▶ (Select)	0	7
D3: Containment action	▶ (Select)	0	10
D4: Define and verify non-detection root cause(s)	▶ (Select)	0	10
D4: Define and verify occurrence root cause(s)	▶ (Select)	0	10
D5: Choose and verify non-detection corrective action(s)	▶ (Select)	0	10
D5: Choose and verify occurrence corrective action(s)	▶ (Select)	0	10
D6: Implement non-detection corrective action(s)	▶ (Select)	0	10
D6: Implement occurrence corrective action(s)	▶ (Select)	0	10
D7: Action(s) to prevent recurrence	▶ (Select)	0	10
D8: Closing 8D	▶ (Select)	0	5
Report	▶ (Select)	0	3
Total score		0	100
Total (%)		0.0%	
8D report evaluation done by (name, dpt):			

Figure 65 8D Supplier Evaluation

The report evaluation information is also displayed in the PDF download.

3.2.11 Overview of Mandatory Supplier Fields

Legend

[L]	Separate Hyperlink to open a new window
x	NOT mandatory to submit
m	mandatory to submit
Mind. one	at least one item needed to submit
Mind. one for each tab	at least one for each tab needed to submit, tabs: "Non-detection" and "Occurence"
OE or CB	either Overall effectiveness (OE) or Checkbox (CB) must be filled to submit
m	mandatory to set status complete by supplier, not to submit D-step
m	mandatory to set status closed by supplier, not to submit D-step
	Difference 8D and 8D Plus

Response Type: Requirements to Submit a D-Step

Case: Due dates set by customer

		8D	8D Plus
Basic Data	(Submission incl. D1)		
	8D reference	x	x
	Production date (supplier)	m	m
	Comment to customer	x	x
	Attachments	x	x
Supplier internal Data	(Internal Usage only, no submission at all)		
	All	x	x
D1	(Included in Submission of Basic Data)		
	[L] Add Team Member	Mind. one	Mind. one
	Team Leader	Mind. one	Mind. one

D2 (Included in Submission of D3)		
D2 description	m	m
Attachments	x	x
Comment on recurring error	x	x
D3 (Submission incl. D2)		
[L] Add D3 action	Mind. one	Mind. one
Title	m	m
Description	m	m
Responsible	m	m
Effect	m	m
Validation description:	x	x
Planned Implementation	m	m
Actual implementation:	m	m
[L] Add Overall action effectiveness	OE or CB	OE or CB
Mark Checkbox "not applicable"	OE or CB	OE or CB
D4		
[L] Add Extended root cause analysis	Mind. one	Mind. one for each tab
Category	Mind. one	Mind. one
Verified by	m	m
Relevant	Mind. one	Mind. one
Create 5-Why analysis	Mind. one	Mind. one for each tab
Why	Mind. one	Mind. one
Create Root cause	Mind. one	Mind. one
Title	m	m
Description	m	m
Root cause type	x	x
Contribution	m	m
[L] Add Failure Reproduction	x	x
[L] Add Extended Risk Assessment	x	x
[L] Add Root Cause	x	x
D5		
[L] Add Action	Mind. one	Mind. one for root cause

	Title	m	m
	Description	m	m
	Root cause	m	m
	Effect	m	m
	Planned implementation	x	x
	Attachments	x	x
	[L] Add Overall action effectiveness	m	m
D6			
	[L] Add Action	Mind. one	Mind. one for root cause
	Title	m	m
	Description	m	m
	Root cause	m	m
	Responsible	m	m
	Planned implementation	m	m
	Actual implementation	m	m
	Date	m	m
	Effect	m	m
	Description	m	m
	Attachments	x	x
	[L] Add Cancellation of containment actions	x	x
	[L] Add internal D6 Action	x	x
	[L] Add Overall action effectiveness	m	m
D7			
	[L] Add Action	Mind. one	Mind. one
	Title	m	m
	Description	m	m
	Root cause	m	m
	Responsible	m	m
	Planned implementation	m	m
	Actual implementation	m	m
	[L] Add Drill-Wide Analysis	x	Mind. one
D8			

Table 2: Overview of Mandatory Supplier Fields

3.3 Other Features

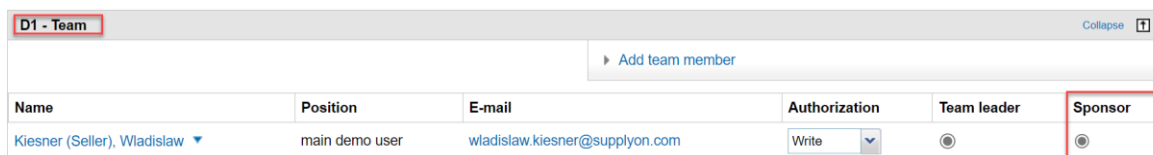
3.3.1 VDA Features

To fulfill the requirements stated by the VDA, there are some additional features in different D-steps. All options are only available for 8D response types.

3.3.1.1 D1 – Team: Sponsor

The “*Sponsor*” is a new role that has been added to the team roles. The “*sponsor*” should be someone from senior management with decision-making authority who can ensure that the team has all the resources it needs. He should act as an intermediary between the team and management.

To select the “*sponsor*”, simply tick the team member's radio button in the appropriate column (Figure 66). The “*sponsor*” can be the “*team leader*” and “*sponsor*” at the same time. But please note that only one member per 8D team can be assigned the role of the “*sponsor*”.

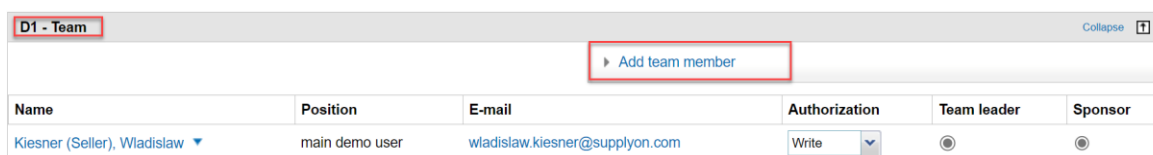


Name	Position	E-mail	Authorization	Team leader	Sponsor
Kiesner (Seller), Wladislaw	main demo user	wladislaw.kiesner@supplyon.com	Write	<input type="radio"/>	<input checked="" type="radio"/>

Figure 66: Additional Role “Sponsor”

Sponsor functionality only applies to 8D and 8D with GA response types. For other responses the functionality is not available.

Clicking on the “*Add a Team Member*” hyperlink will open a new contact tab (Figure 67) and, like any other team member, a “*sponsor*” can be added from the existing registered users, or an unregistered one can be added.



Name	Position	E-mail	Authorization	Team leader	Sponsor
Kiesner (Seller), Wladislaw	main demo user	wladislaw.kiesner@supplyon.com	Write	<input type="radio"/>	<input type="radio"/>

Figure 67: “Add team member”

3.3.1.2 D2 – Problem Description: Is/Is-Not-Analysis

The goal of the additional “*Is/Is-not Analysis*” is to analyze problem deeper. This is done through clearly identifying what is part of the problem scope, by creating an accurate problem description in suppliers own, clear words, to avoid vagueness and ensure that the problem is understood correctly, and by conducting a more detailed analysis of the problem to ensure focus on the right causes.

Category	Question	What is it?	What is it not?
Core problem	What?	Which product is affected?	Are similar products not affected?
Place	Where?	Where has the problem occurred?	Where could also occurred?
Timing	When?	When deviation occurred?	Could happened early already?
Amount	How many?	How many deviations exist?	Are further deviations expected?

Table 3: Is/Is-Not-Analysis Structure

To add an “Is/Not analysis”, click on the hyperlink shown in step D2 and a separate window will open (Figure 68).

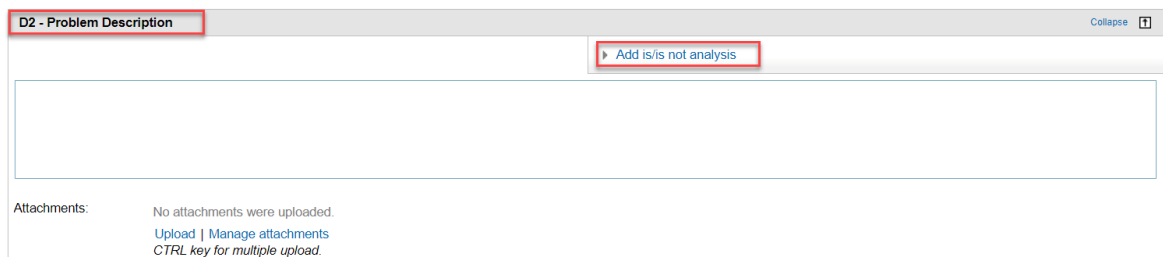


Figure 68: “Add Is/Is Not Analysis”

The four questions to be answered appear in a table in the opening window (Figure 69). Please note, that only one analysis can be submitted per complaint, and it is possible to add attachments.

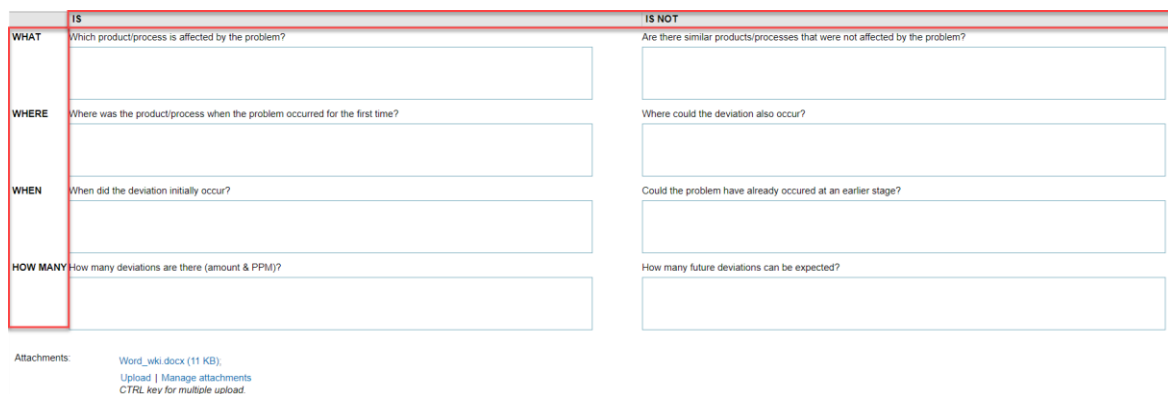


Figure 69: “Is/Is-Not-Analysis”

If the questions have been completed, it is possible to select the question category in a **D3 Step**. An additional dropdown is available to assign a containment action directly to a problem identified in the “Is/Not analysis” (Figure 70).

Figure 70: Drop-down assignment to a specific question of the “Is/Is-Not-Analysis”

3.3.1.3 D4 – Root Cause Analysis: Update Reminder

After a thorough investigation of the causes in step D4, new information may emerge that require a change in the previous information given in Step D2 and D3. To remind the person editing the 8D to make these necessary adjustments in the previous steps, two additional check boxes are displayed in step D4 (Figure 71). These are designed to re-think and re-evaluate the information provided at the start of the problem-solving process and to update the “Is/Is-Not-Analysis” and “Risk Assessment” based on these findings.

Figure 71: Update Reminder Checkboxes

If the update has been carried out or is not required, the box can be ticked by a person who is part of the D1 team. Also, the checkboxes can be changed after saving and sending to customer if the complaint is in Status "open". But only the name of the last person to tick the box and a timestamp will be displayed (Figure 72).

Figure 72: Ticked Checkboxes

3.3.1.4 D5 – Corrective Actions: Add Effectiveness Assessment and Negative Impact

D5 provides two additional fields. The first is the text field “*Effectiveness Assessment*” below the “*Effect: in %*” (Figure 73). This is used to explain and evaluate the effectiveness in more detail and complements the single % value of the effectiveness of a corrective action.

The screenshot shows the 'Add D5 action' form. The 'Effectiveness assessment' field is highlighted with a red box. Other fields include Title*, Description* (with a placeholder 'Operation Step / Error Prevention / Error Detection'), Status (Draft), Root cause* (dropdown), Effect* (input field with a % sign), Planned implementation (calendar and dropdown), Negative impact (dropdown set to 'Yes'), and Attachments (with links for Upload, Manage attachments, and CTRL key for multiple upload).

Figure 73: Additional text field “*Effectiveness Assessment*”

The second addition is a dropdown field “*Negative Impact*” with the two selection options “*Yes*” and “*No*” (Figure 74).

- If “*No*” is selected:

This means that no negative consequences are expected from the implementation of the corrective action.

- If “*Yes*” is selected:

Each of the invented actions can have a negative effect, i.e. it can reduce the productivity of the plant, because the speed must be reduced to document such consequences, an additional text field is provided in step D5.

The image shows two side-by-side screenshots of the 'Add D5 action' form. In the left screenshot, the 'Effectiveness assessment' field is highlighted with a red box. In the right screenshot, the 'Negative impact' dropdown menu is highlighted with a red box, showing the 'Yes' option selected.

Figure 74: Negative Impact "No" and "Yes"

3.3.1.5 D7 – Prevention of Reoccurrence: Independent Evaluator

The aim of the new role of the "Independent Evaluator", introduced in D7, is to select an independent person who will evaluate the whole of the 8D process (Figure 75). This person must fulfil a few characteristics:

- Person **must not be part** of D1-Team
- Only **one** evaluator per complaint
- Must validate **all** steps and actions taken without bias
- **Selection of Evaluator:** A D1-Team member assigns a person with a or without an existing SupplyOn Account as the evaluator role in step D7

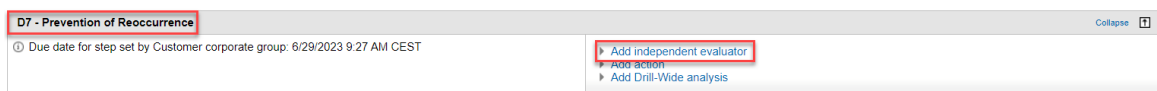


Figure 75: "Add Independent Evaluator"

The selected evaluator will be notified by email, has limited read-only access to the complaints he is assigned to. The only change he can perform is the writing permissions to tick one checkbox in Step D8 „Independent evaluation performed“ (Figure 76). After his extensive evaluation of the correctness of all previous 8D-steps he can give his ok and green lights that everything has been performed properly by ticking the checkbox. The name, date and time will be displayed automatically.

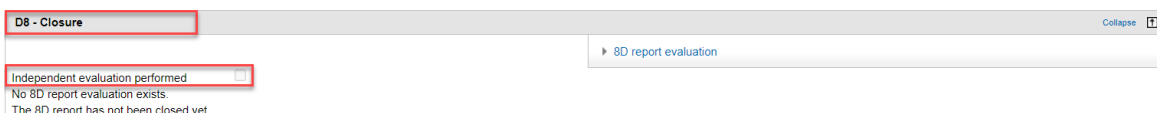


Figure 76: Checkbox „Independent evaluation performed“

3.3.2 Problem Solving Guideline

At the top of the complaint, on the right-hand side, there is a hyperlink that takes you to a "Problem Solving Guideline" (Figure 77). It links to the "SupplyOn Support Center", where you will find lots of information about the ProblemSolver and help with your questions.

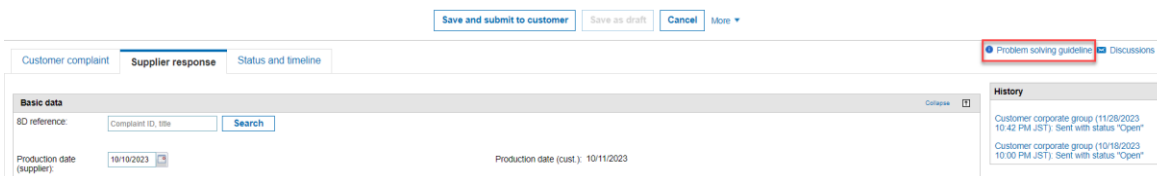


Figure 77: "Problem Solving Guideline"

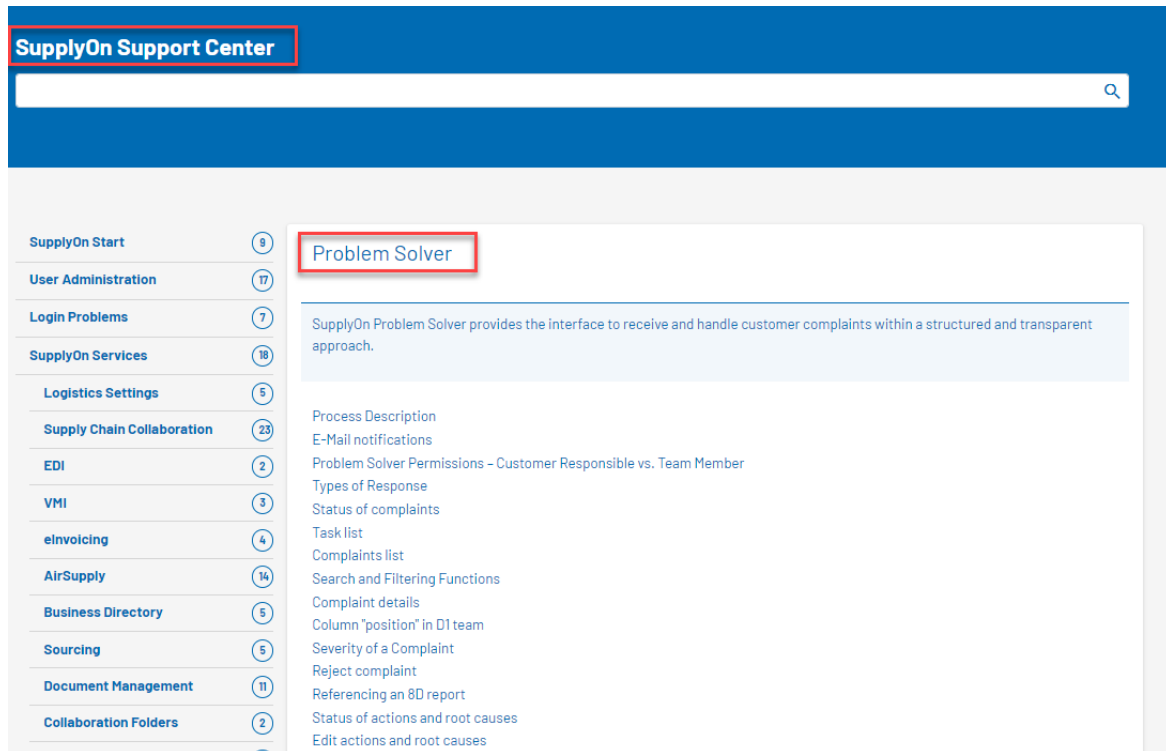


Figure 78: SupplyOn Support Center

3.3.3 Discussions

To the right of the “*Problem-Solving Guideline*” is a little envelope icon called “*Discussions*” (Figure 79). There you can start a so-called object-related discussion with your customer.

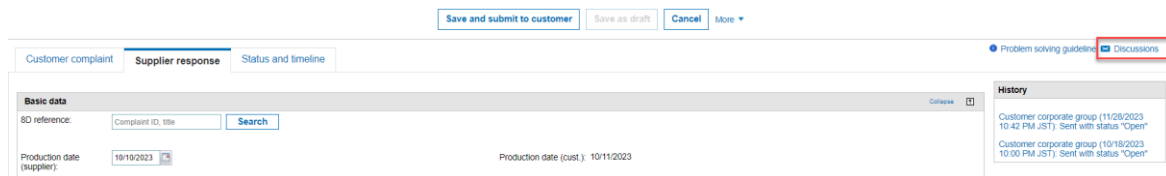


Figure 79: Start Discussion in SupplyOn

For example, if you need technical specifications from your customer, do not request them via your personal e-mail account, but start a discussion in SupplyOn. The advantage of this is that everyone can see if there has been a discussion started and has immediate access to the data, which is not disclosed in a personal e-mail account.

You can also see whether there is a new message or an open conversation on the problem solver's landing page, as the last column in the overview, “*Discussion*”, also displays a small envelope icon, depending on the status of the discussion (Figure 80).



Figure 80: Opened envelope indicating comment in discussion was marked as read

The envelope switch works as follows:

The sender sends a message. The recipient can decide whether the sender should be able to see that they have read the message, i.e. whether it should be shown as an open or closed envelope. Important: Only when the recipient clicks "mark all as read" on conversation level will the envelope change from closed to open ([Figure 81](#)).

Simply opening and reading the message does not result in an open envelope. "Mark as read" on comment level does not result in an open envelope.

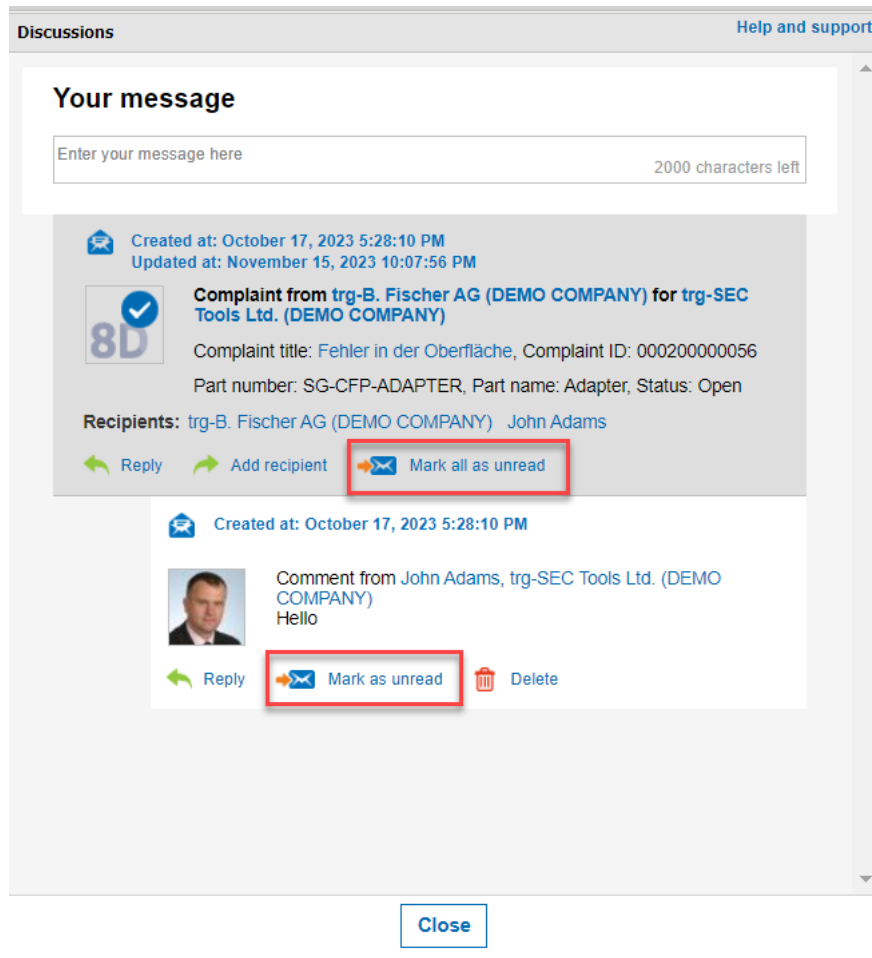


Figure 81: Envelope Switch

3.3.4 History

The Complaint "History" is the third feature on the right-hand side ([Figure 82](#)). Each published change is automatically saved as a new record, so you can review the history of a complaint. When you click on a link, the complaint will open as a PDF document.

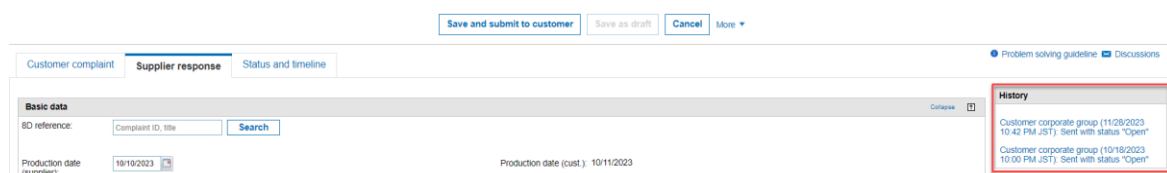


Figure 82: Automatically saved complaint editing "History"

3.4 Status and Timeline Tab

In the “*Status and Timeline*” tab, you can see which dates the customer has given you and what, who, and when has sent (Figure 83). For more detailed explanation see 2.2.2_Customer tab “Status and Timeline”.

Dimensional deviation/尺寸超差 (67595) Help and support | Print | Message to support
Ing. B. Fischer AG (DEMO COMPANY)

Customer complaint | **Supplier response** | **Status and timeline** Discussions

Status Collapse

Status: Closed by supplier
 Last customer status change: No status change yet
 Last change by supplier: 12/16/2022 1:42 AM EST, Julia Nash, Saved and submitted
 Last change by customer: 12/15/2022 10:58 PM EST, Jinying Wang, Saved and submitted

Dates for responses Collapse

Step	Due date	Submitted on	Submitted by
Basic Information (includes D1)		12/16/2022 1:32 AM EST	Nash, Julia
D3 Containment actions (incl. D2)	12/16/2022 10:53 PM EST	12/16/2022 1:32 AM EST	Nash, Julia
D4 Root causes		12/16/2022 1:32 AM EST	Nash, Julia
D5 Chosen corrective actions		12/16/2022 1:39 AM EST	Nash, Julia
D6 Implemented Corrective Actions		12/16/2022 1:39 AM EST	Nash, Julia
D7 Preventive Actions	12/29/2022 10:53 PM EST	12/16/2022 1:39 AM EST	Nash, Julia
Status "Completed by supplier"		12/16/2022 1:39 AM EST	Nash, Julia
Status "Closed by supplier"		12/16/2022 1:42 AM EST	Nash, Julia

History

Julia Nash (12/16/2022 1:42 AM EST): Sent with status "Closed by supplier"
 Julia Nash (12/16/2022 1:39 AM EST): Sent with status "Completed by supplier"
 Julia Nash (12/16/2022 1:32 AM EST): Sent with status "Open"
 Customer corporate group (12/15/2022 10:58 PM EST): Complaint created with status "Open"

Figure 83: “Status and Timeline” Tab