HaLe



Thinking tools for moderators

Thinktools for facilitators

Information on the document:

File: 01_EVI_ModulBasis_01_02 en-EN.docx
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Created: 22-07-05 Printed: 24-07-26
Version: 01.02 Status: A Page 1/21
Distributor: Download - Customer area

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1 Introduction

Product and cost optimisation is an elementary component of every product strategy. But how can this strategy be integrated into the development phase?

For VAVE/ TRIZ/LEAN or DFMA users, this question has already been answered for product optimisation. Systematic team events generate ideas that are evaluated and categorised.

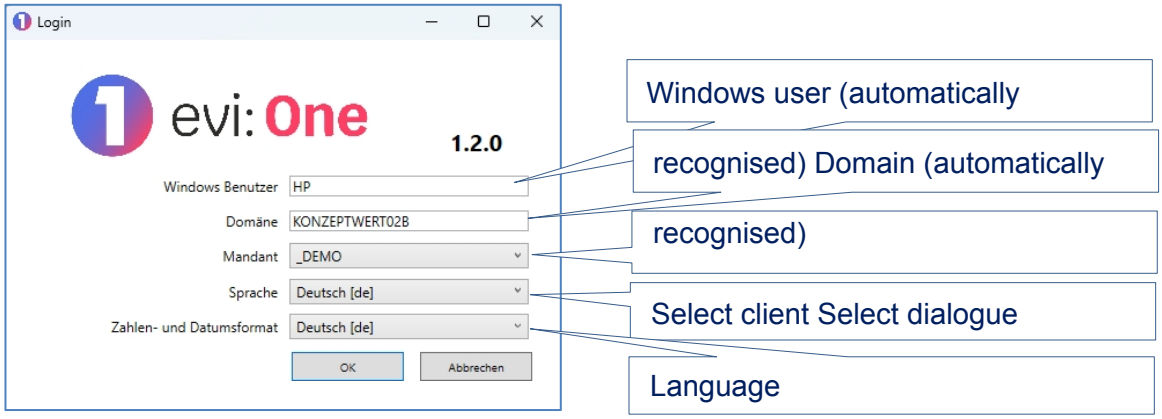
As the project progresses, these ideas are further refined, implemented or supplemented. The result is a treasure trove of ideas that can be used within the company, but can also indicate where further development and research is needed to enable further optimisation.

To support this approach, to provide the facilitator with a powerful yet easy-to-use tool and to visualise team performance, EVI:ONE is used in teamwork.

1.1 Basic information

EVI:ONE is **multilingual** so that it can be used internationally. Furthermore, several clients can be managed.

This means that both SMEs with a development department and internationally operating OEMs with various development sites can promote and manage progress in idea generation.



The dialogues are generally locked for editing. To edit the data, there are two buttons below the menu for editing and saving.



1.2 Home page

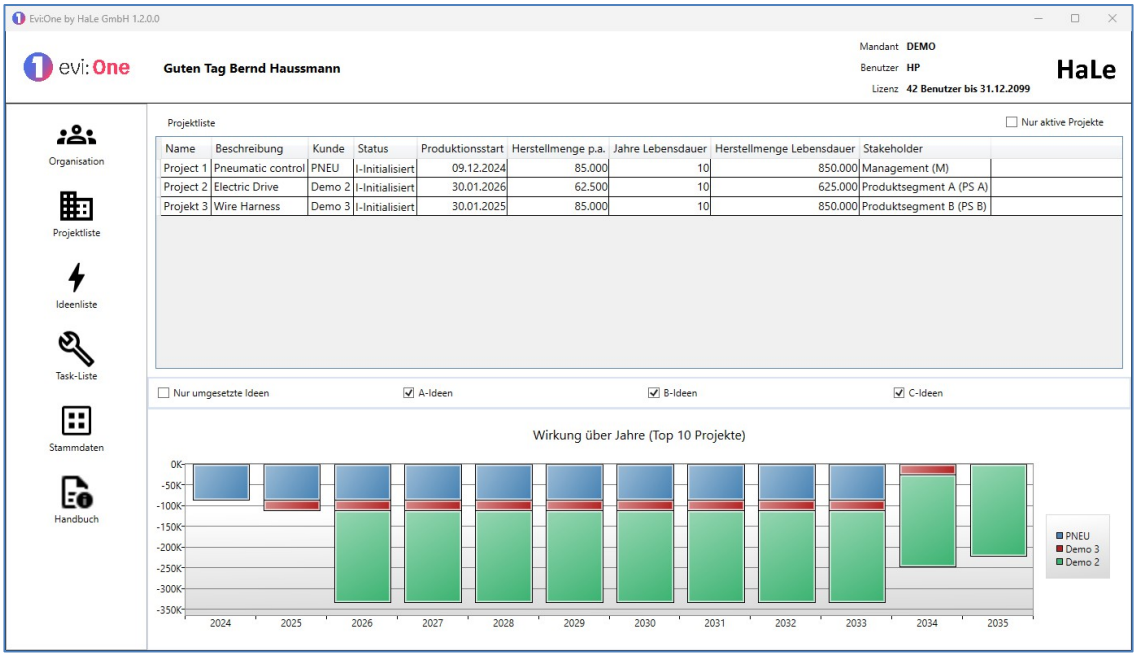


Figure 1-1 Start page

The start page shows four areas

-The header bar at the top

-The navigation bar on the left

- The project list
- The efficiency chart

1.2.1 The header



Figure 1-2 Header bar

1.2.1.1 LOGO (Admin function)



Behind the EVI:ONE logo is a function for administrators or for situations in which remote maintenance is required for possible error messages. must be accessed. This functionality should not play a role for the user in normal use.

Clicking on the logo opens a list of various messages that have been collected during operation. The list can be filtered by user, computer and date in order to pinpoint possible errors.

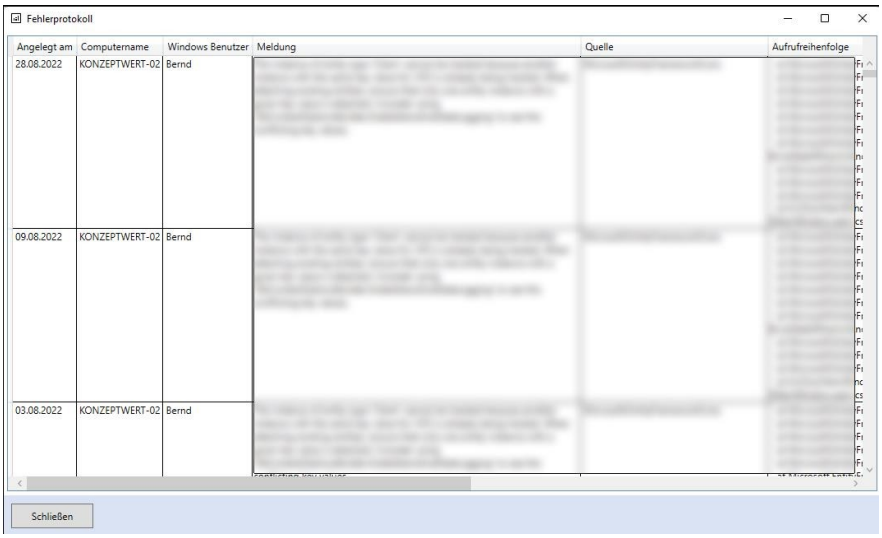


Figure 1-3 Error list

1.2.1.2 The status display



The current client and the current user are shown in the status display. Furthermore, the current licence situation (in the example, 5 users are licensed up to and including 30.09.2022)

1.2.2 The navigation bar



The navigation bar supports the user in directly accessing the dialogues required for project work. The individual dialogues are explained below.

The most important dialogues for the user are the project list, the idea list and the task list.

The organisation and master data are primarily for key users or administrators, as these data sets have the same impact on all projects.

2 Organisation

In order to work quickly with EVI:ONE, it makes sense to record the most important project participants step by step, ideally in preparation for a workshop. Alternatively, a prepared template project could be imported.

The organisation (incl. logo) can thus be displayed step by step and the respective employees assigned to the organisational units.

The assignment of rights is also governed by the organisation.

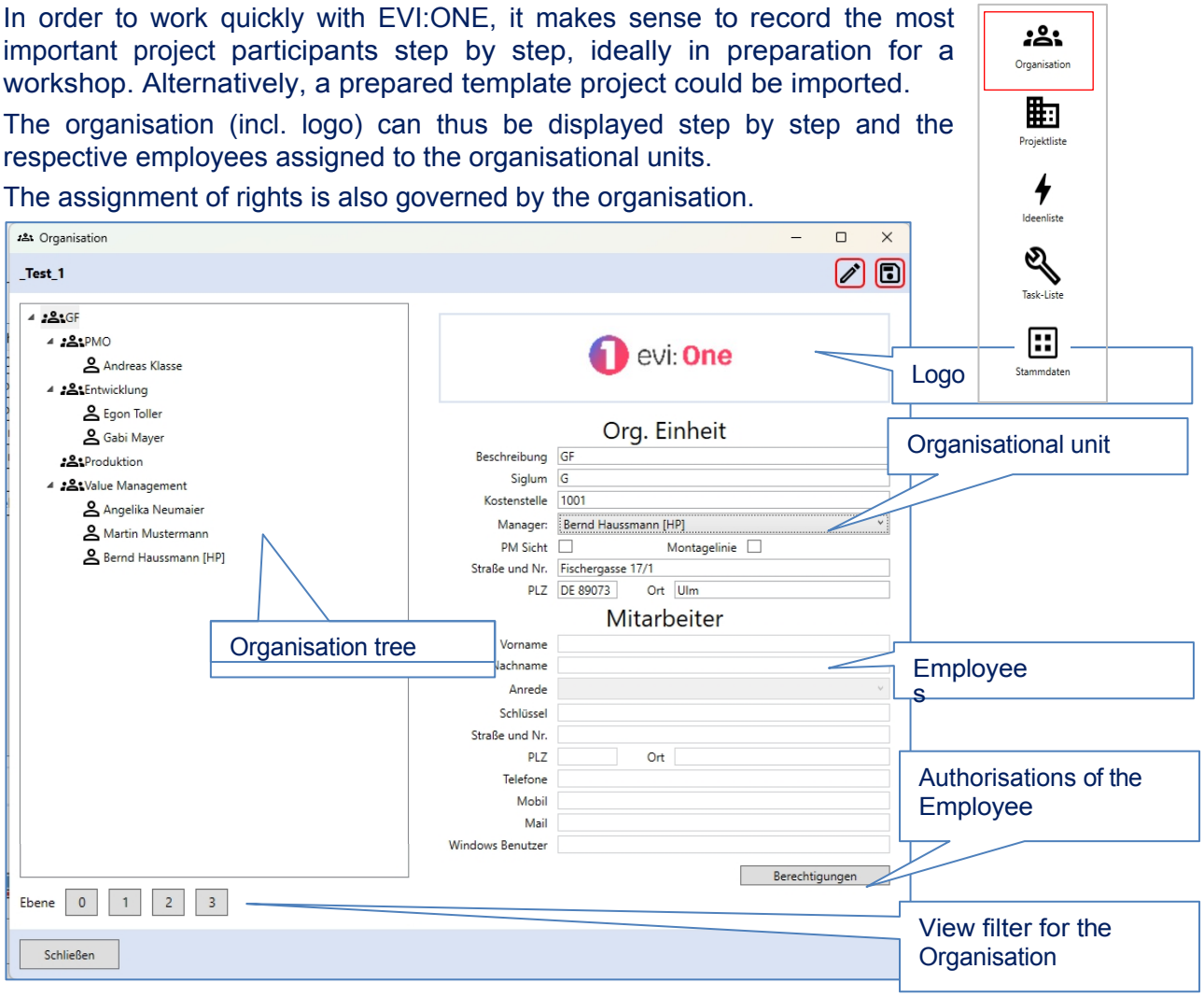
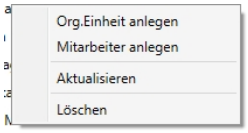


Figure 2-1 Organisation

2.1 Organisation



The organisation can be created, expanded or changed via the organisation tree using the right mouse button. An organisational unit (OU) is always created underneath the OU that is currently selected. If no OU exists yet, the header is created.

Within the organisation, the stakeholders for projects should also be taken into account, as the stakeholder is also queried for each project (see 4.1 Basic industrial data page 10).

The **postal address** can also be specified for each organisational unit. This enables reporting broken down by geographical attribute (e.g. potentials of all northern plants, etc.)

The logo can be imported from a standard graphics file by selecting a file (right mouse button).

2.2 Employees

The employees are created within the OU. (right mouse button)

Employees can be freely named, only the Windows user field must correspond to the login of the Windows system in order to control the assignment of rights.

As most employee data is maintained in other systems, it is advisable to maintain as little as possible and as much as necessary.

2.3 Authorisations

One or more roles can be assigned to each employee. Each role contains specific rights to individual dialogue objects.

For example, the employee in the picture ("Egon Toller") has been assigned the rights *Engineer* and *Task-Response in* order to be able to access, read and/or write in the various areas.

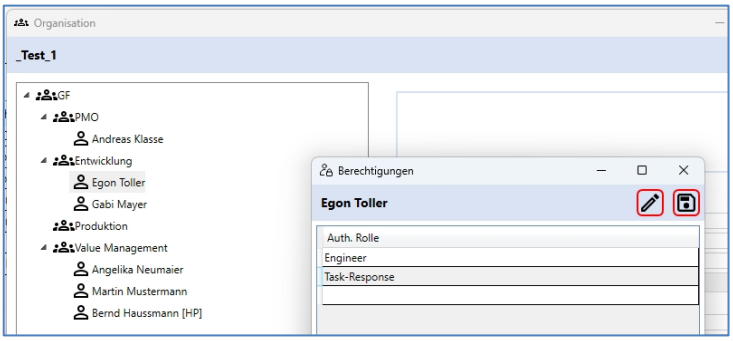


Figure 2-2 Authorisations

Authorisations and roles can only be created/assigned by the administrator.

2.3.1 Master data - roles

[for administrators only]

In the Master data area, **tab "Auth. Role" tab,** the roles can be defined. Each role describes the access to an Auth. Object (AO) and the corresponding activity authorisation (AA) for it.

There are four AOs ("Project", "Idea", "Task", "Organisation") and two AAs ("Edit", "Dis- play").

The individual rights of an employee result from the assignment of these roles to their authorisation profile.

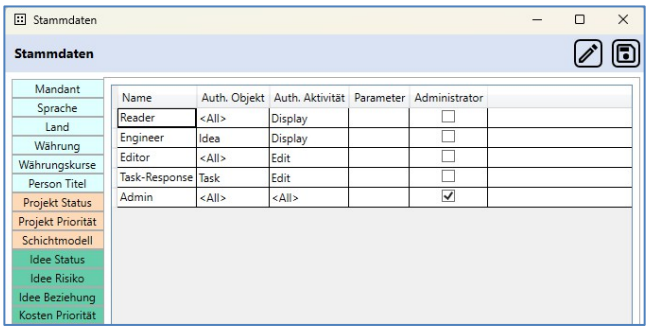
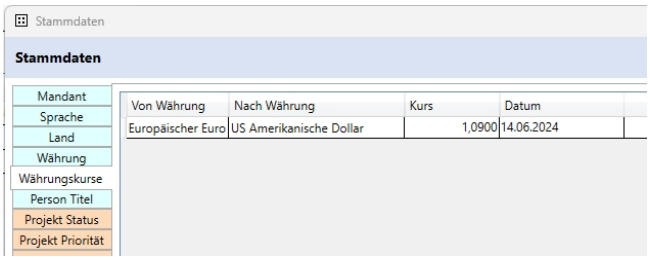


Figure 2-3 Authorisations master data

2.3.2 Master data - Currencies

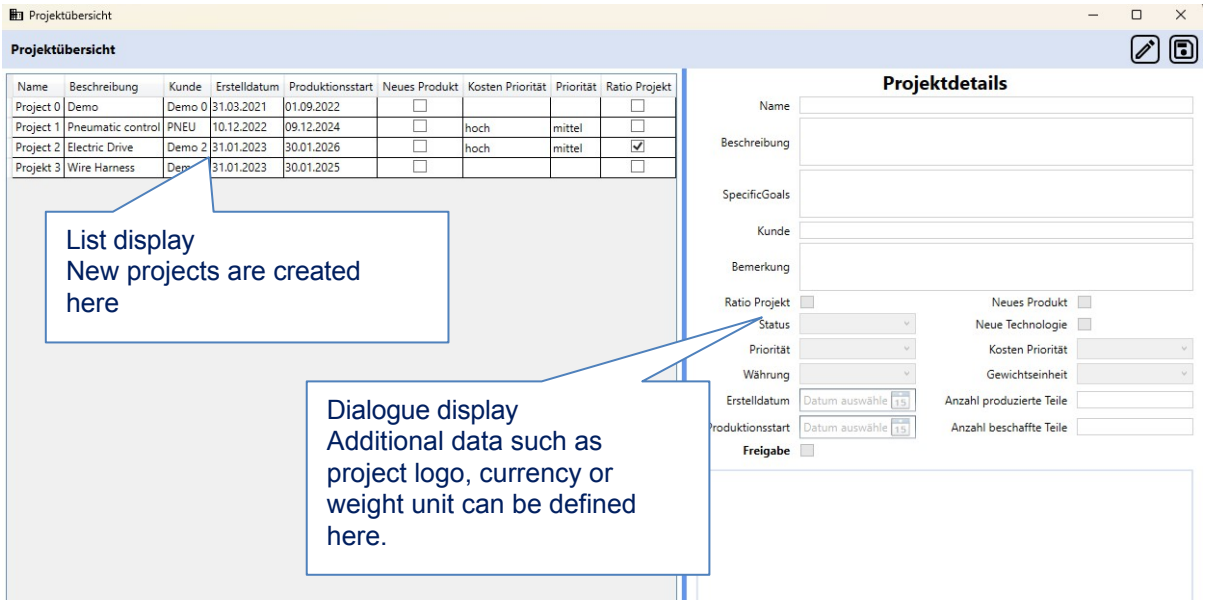
There is a conversion table so that projects can be realised in different currencies. These entries should be maintained by appropriately trained employees.



3 Project list

3.1 Project organisation

Each organisation carries out various projects in different priority areas. The active projects are presented in a list and by means of detailed data in order to present the priorities in a harmonised manner and to carry out further project planning.

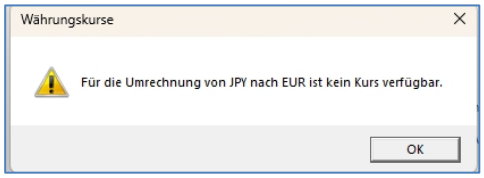


This application helps the project coordinator or steering committee to assign the moderators and experts to the projects. Each project is described with significant key figures to make it easier for the moderators and experts to enter the project and to enable the team event duration to be estimated.

Detailed settings such as **weight unit** and **currency** are also set in the project overview.

⇨ A project can be created in any foreign currency. The conversion takes place via an entry in the master data.

⇨ If a currency without conversion is selected in the project, the user receives a corresponding message

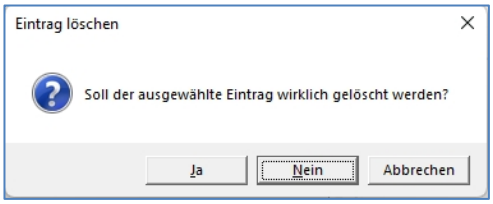


⇨ However, if the currency of the project is centred at a later point in time, no conversion will take place. Therefore, please be careful with this setting.

⇨ If the unit of weight is changed during the project, there will be no conversion.

Double-click on the project entry in the list to branch directly to the respective project.

A project can also be deleted here. A warning is issued, after which all elements associated with the project are deleted.



Depending on the licence, entries such as ideas, project FMEAs, product FMEAs, related actions, etc.

3.1.1 Import and export projects

It is also possible to import or export projects in this dialogue. This function can be used, for example, when preparing or applying so-called template projects.



be helpful.

A template project can, for example, be pre-filled with typical team colleagues or meeting sequences, which should then be adapted to the timeline.

4 Projects

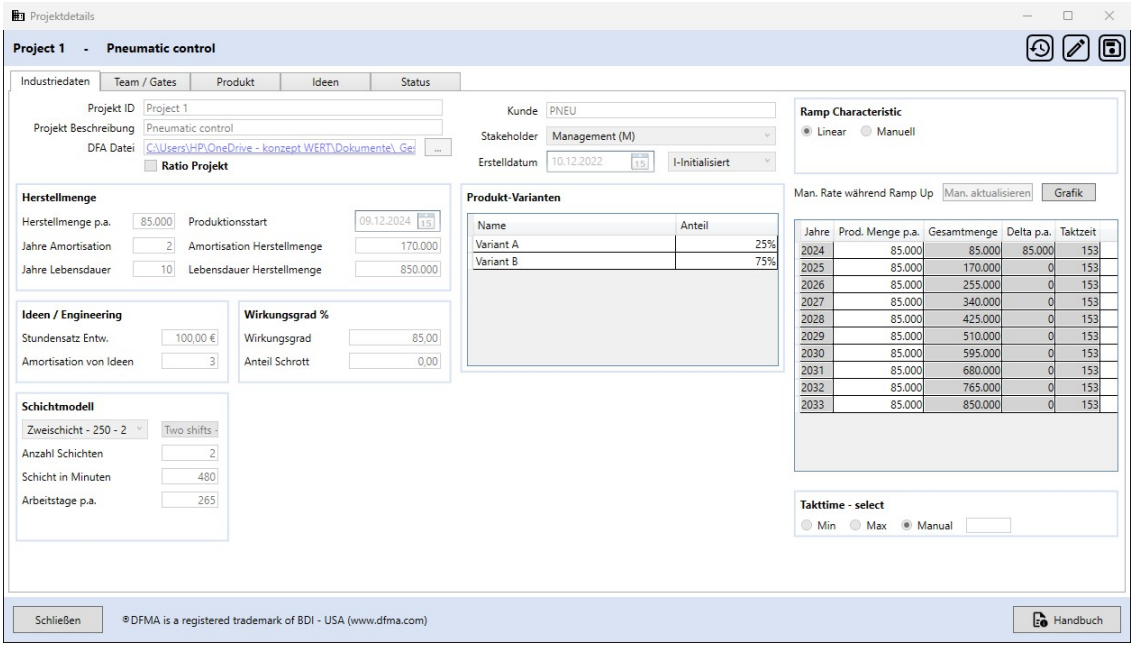
The basis of EVI:ONE is the project.

Each project collects the relevant optimisation data for processing, and the subsequent follow-up of open actions on ideas or risks.

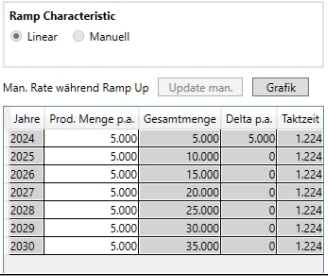
4.1 Basic industrial data

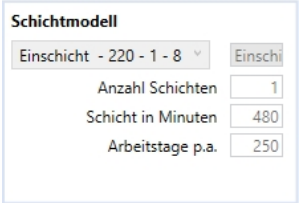
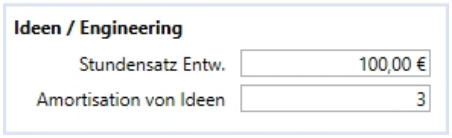
Every industrial project has specific key figures that influence how the upcoming "decisions" that must/may be made by the project team or the project manager turn out.

Figure 4-1 Project details - industry data



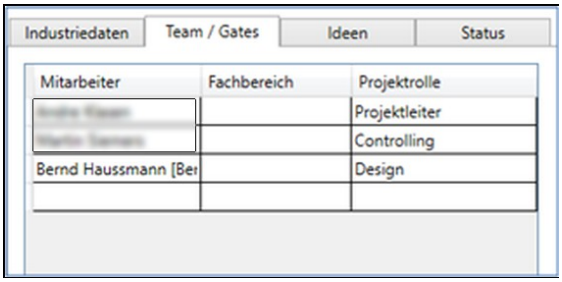
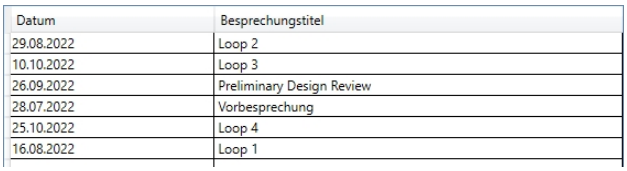
Important for cost-relevant decisions include

a) the production quantities of the product, over the life cycle, but also over the amortisation period.	
b) The distribution of the number of pieces over the lifetime to minimise the customer cycle time (in seconds)	

c) The shift model and the efficiency of the production system (for determining the cycle time) Three models are available, which can be customised manually.	 *Figure 4-2 Shift model*
d) The hourly rate for necessary unplanned adjustments for the realisation of ideas	 *Figure 4-3 Basic data development*
e) A description of the variants in order to be able to assign the ideas / scenarios to one or more variants. e.g. "market shares" or, in the case of cars, the proportion of "right-hand drive vehicles" No plausibility check is carried out.	 *Figure 4-4 Variants*

4.2 Team and Milestone/Gates

Every project is carried out by people. Each project member fulfils a specific role, contributes skills and experience and is responsible for one or other specific decision.

f) Specific membership lists can be created for projects. The function/role of the members can be defined for naming the members.	 *Figure 4-5 Team members/roles*
g) Project roles are used in other modules	
h) Each team meeting is documented with date and title.	

i) Double-click on an individual entry to access further documentation options for ideal moderation of the projects.
   j) Participants
   k) Agenda
   l) Expectations
   m) Feedback
   n) Tasks for discussion
   o) Idea status
   p) Lessons learnt

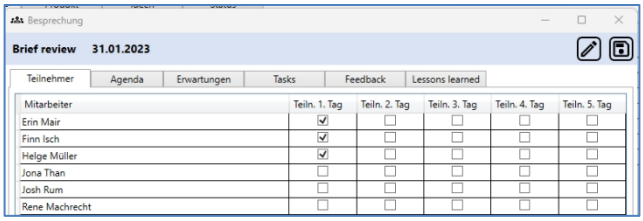


Figure 4-6 Meeting details Participants

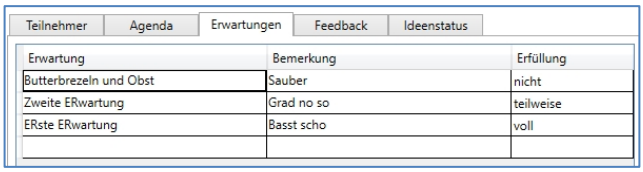


Figure 4-7 Meeting details Expectations

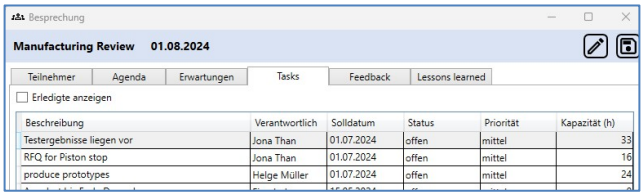


Figure 4-8 Meeting details Tasks

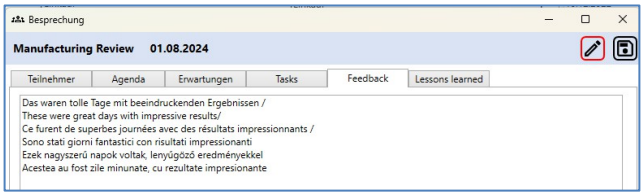


Figure 4-9 Meeting details Feedback

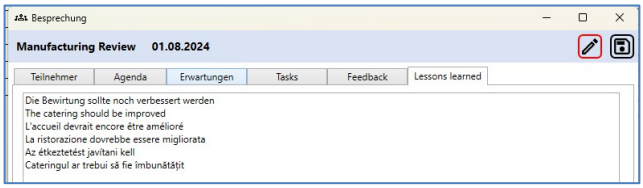


Figure 4-10 Meeting detail Lessons learnt

The meeting details Lessons learnt are not included in any report. They are only for the reflection of the moderator (team).

4.3 Ideas

The actual core of every workshop is the generation of ideas. How these ideas are generated is secondary. For product and cost optimisation, for example, ideas can be generated from the questions of the DFMA methodology.

Ideas can be documented, developed and managed in EVI:ONE. Within a
The "Ideas" tab is available for editing ideas in a project.

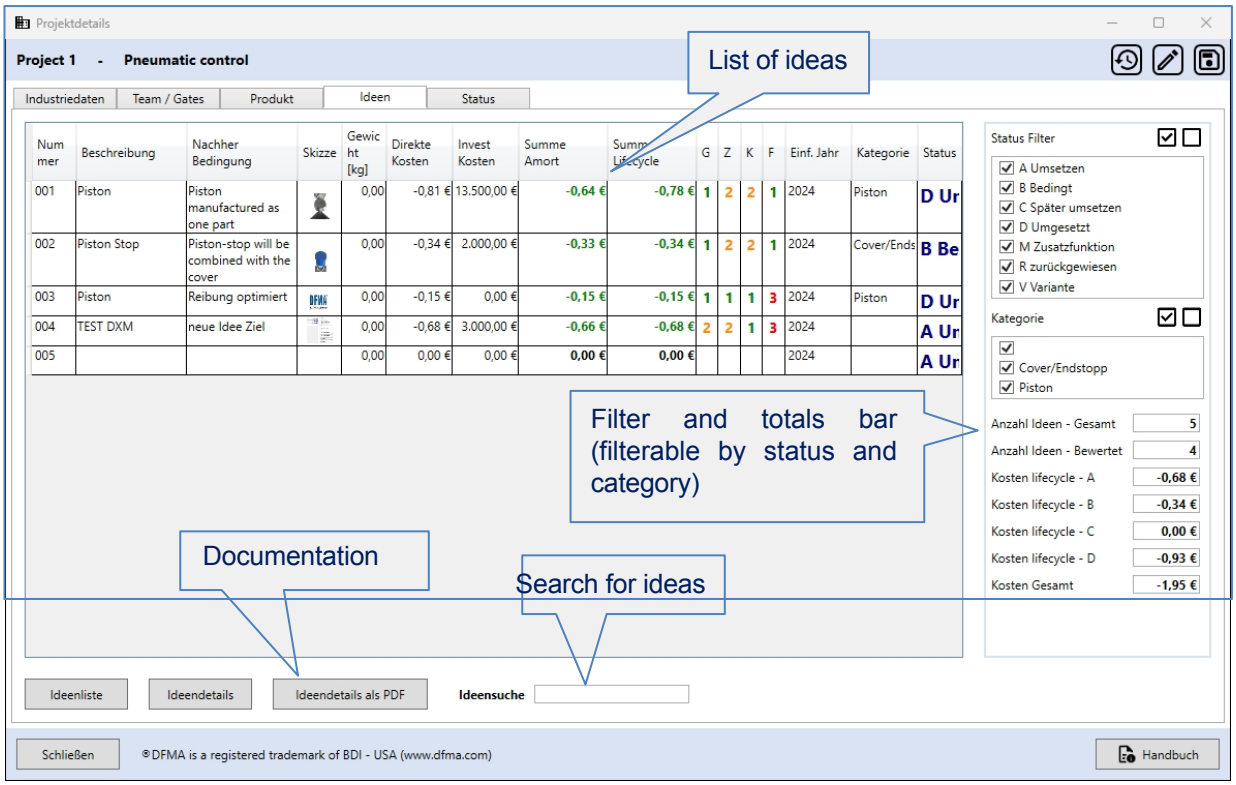


Figure 4-11 Listing of ideas in the project

Each idea can either be included as a simple entry in the **list of ideas** or worked out in detail.

The simple entry includes the following information:

-Number (recommended consecutive)
- Before
- Weight reduction
-Change Invest costs
- Status
-Description (of the idea)
- Afterwards
-Change Direct costs
- Year of introduction

The Total amortisation and Total lifecycle fields are generated automatically

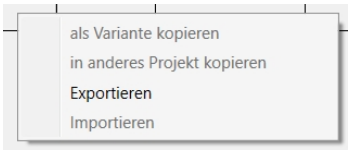
The fields for risk protection G (=weight), K (=cost), Z (=time), F (=function) are available for detailed idea processing

Double-click on an entry in the idea list to open the editing window for detailed elaboration of the idea.

If ideas are to be searched for or filtered, the selection list on the right and the free text search are available. This function works interactively, i.e. it is possible to filter first and then search.

The totals bar is controlled by the categories.

4.3.1 Duplicate ideas, copy, import/export



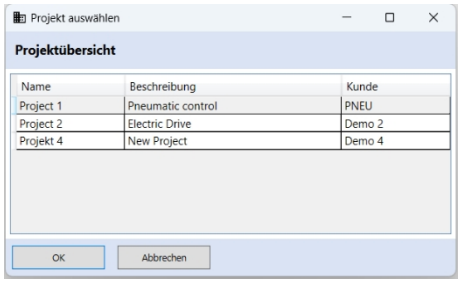
By right-clicking on an idea, it is possible to duplicate it as a variant, copy it to another project or export it.

The import of other ideas is also initiated here.

a) Copy as variant
Finished with the message, the copy of the idea is saved in the addition "(copy)" to the description



b) Copy to another project
Is answered with the selection field of the other active projects:



The idea is copied to the selected project by selecting it and clicking OK.

c) Export
Clicking on Export opens the Windows dialogue "Save as". By selecting the directory and naming the idea, it is then available as an XML file.

d) Import
Clicking on Import opens the Windows "Open" dialogue. The file format is set to XML. Individual ideas can then be selected and imported.

4.3.2 Idea processing

4.3.2.1 Detailed elaboration of ideas

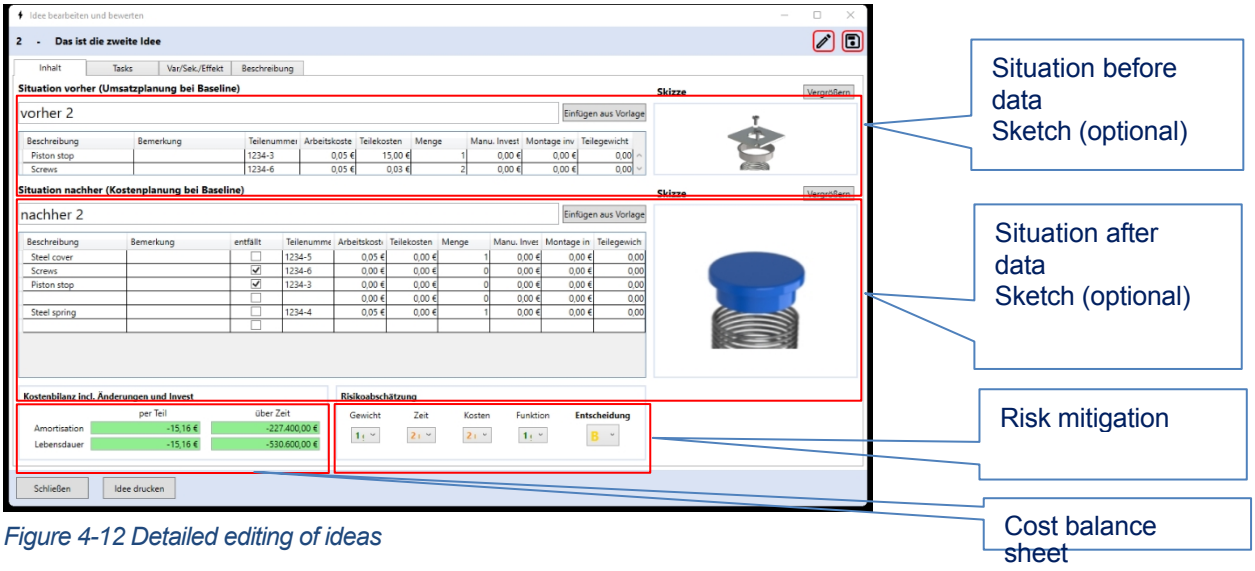


Figure 4-12 Detailed editing of ideas

4.3.2.2 Tasks for the idea

We do not want to micromanage.

It should be possible to record tasks with the person responsible in order to keep an eye on progress and to be able to manage the tasks in the event of special circumstances (illness, change, cancellation, etc.).

If the necessary capacity for a task is protected, it is important not to overload the person responsible.

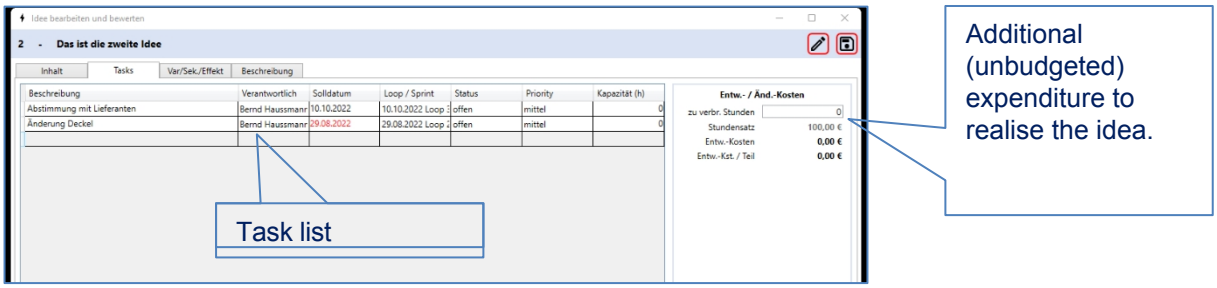


Figure 4-13 Tasks for the idea

4.3.2.3 Variants / Secondary effects

There can be three possibilities when developing ideas.

1) The idea is applicable to the entire project scope
2) The idea is only applicable for a defined portion of the project scope (either the defined variants or a freely definable restriction)
3) The idea can be applied to additional products (beyond the scope of the project).

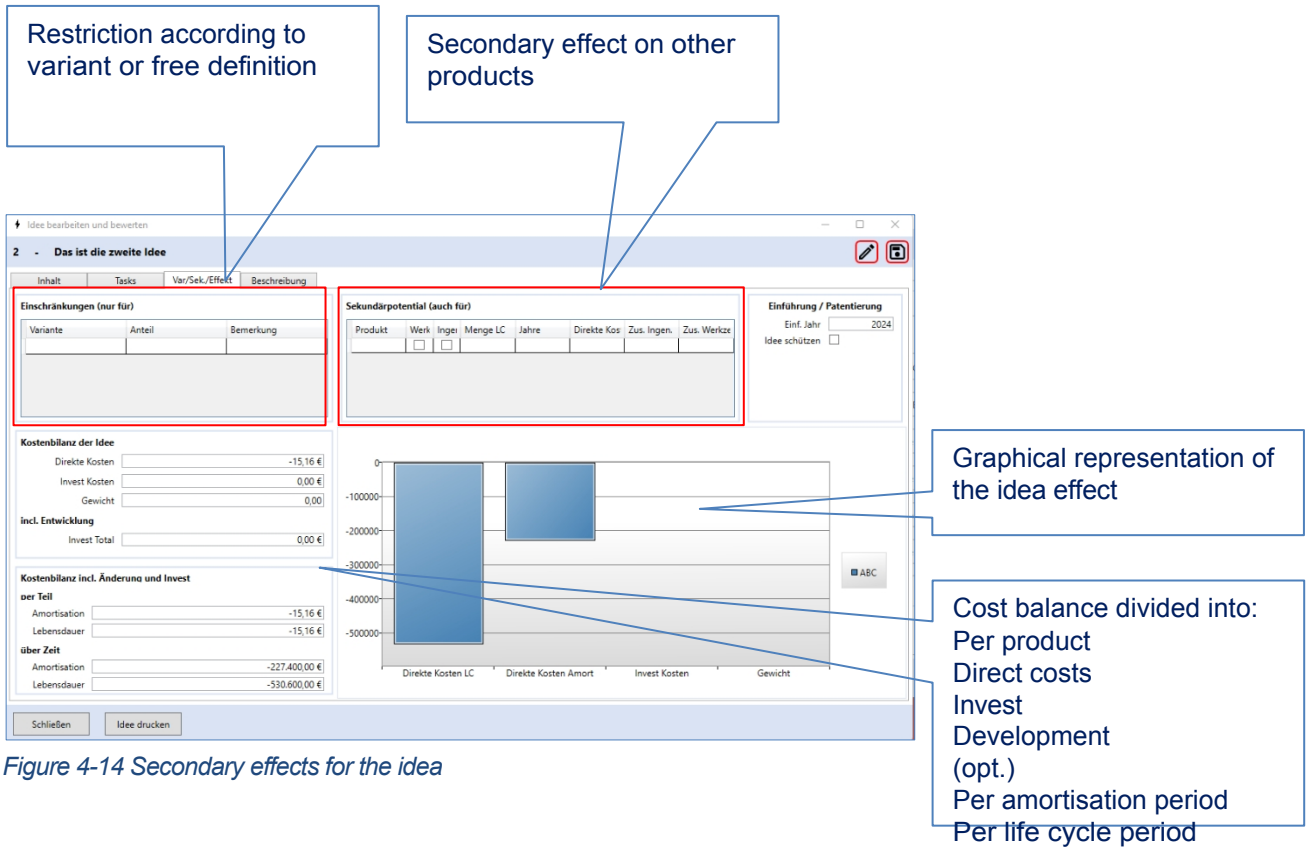
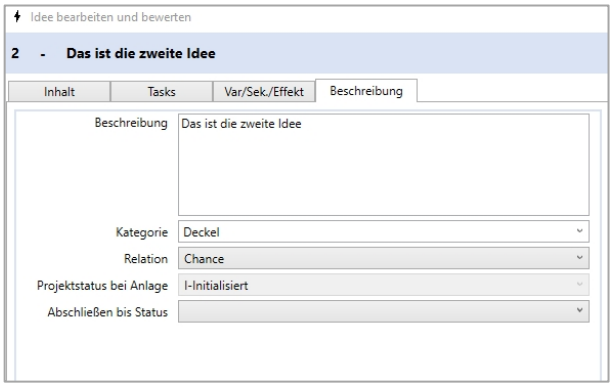


Figure 4-14 Secondary effects for the idea

4.3.2.4 Description of the

In the "Description" tab, you can enter additional information for each idea.



- The description can be found here
- Category for grouping the ideas (free categorisation possible)
- Relation (is this an opportunity or a risk)
- The project status in which the idea was entered (default setting is initially I = Initialised)
- Expected finalisation of the idea (for EVI:ONE-Basis this field is open)

4.4 Status

In the course of project processing, it is usually important for the project manager to know what options still exist for his project. This snapshot can be called up in the "Status" tab.

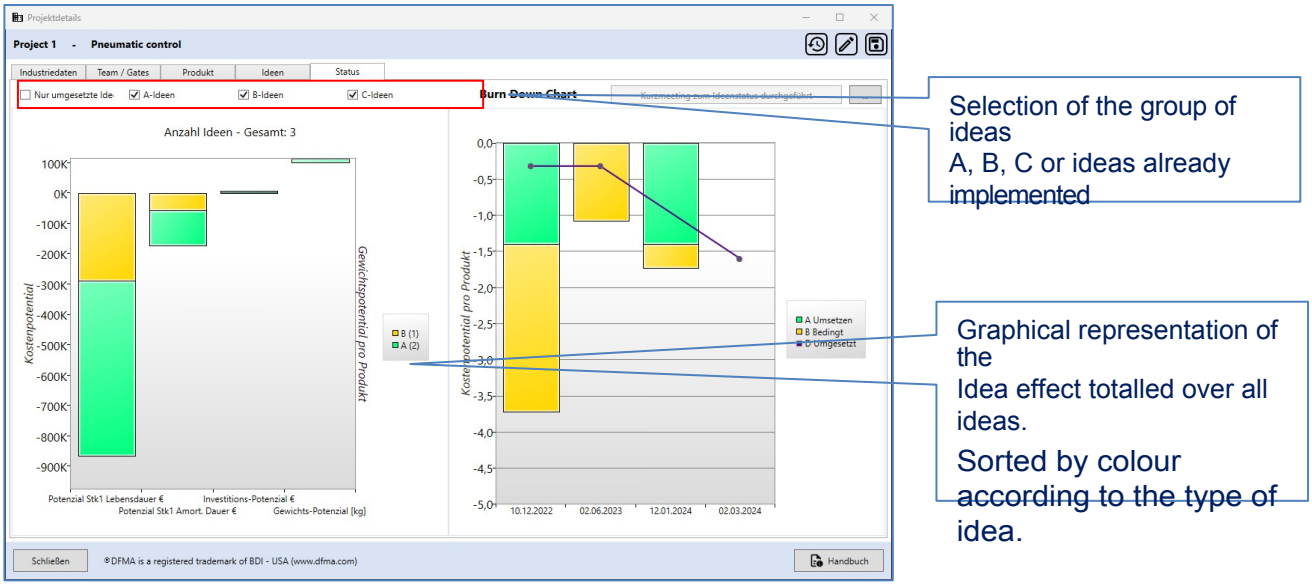


Figure 4-16 Idea status of a project

5 List of ideas

To make it possible to search for and edit ideas without having to open the project each time, this can be done via the idea list.

The first step before editing is the SEARCH.

The list of all ideas can be searched efficiently using the following options.

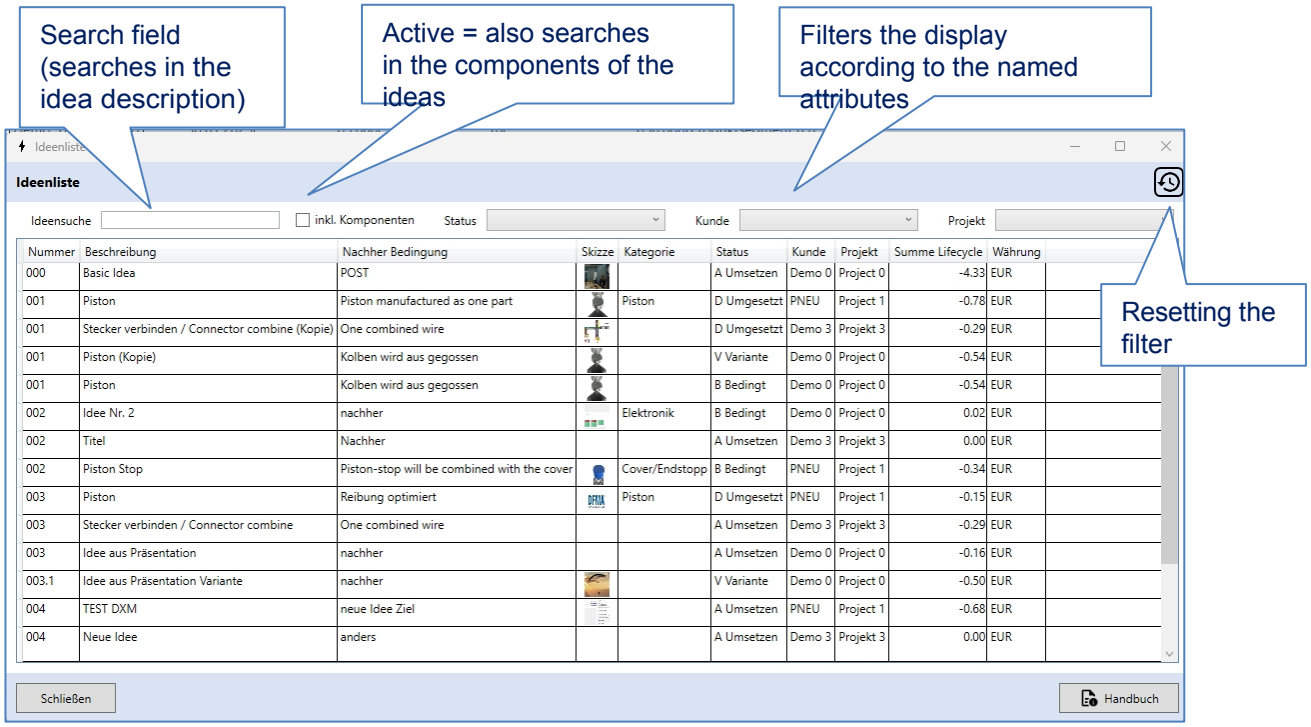


Figure 5-1 List of ideas

Double-click on an entry to open the selected idea directly.

Over time, a library of ideas is created, which is also helpful for younger colleagues.

6 Task list

The task list can be opened to obtain an overview of the tasks documented for the ideas. It is divided into two areas.

Links to the **task tree**, in which all tasks for all projects are displayed and which can be efficiently reduced using the filter function.

On the right-hand side, the status of the task, the target processing goal and various files can be linked as documentation.

This is also where the feedback takes place.

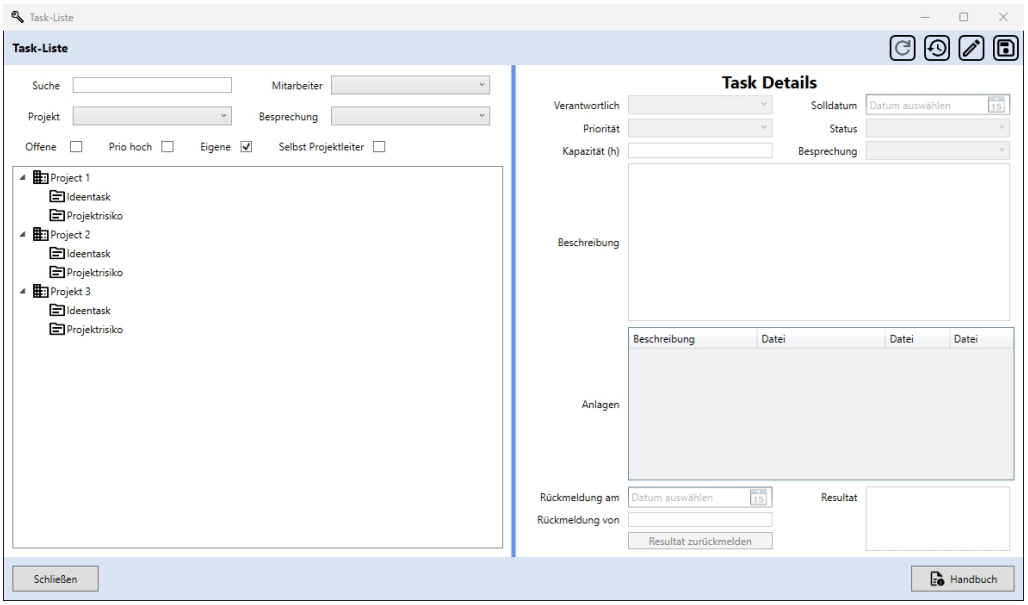


Figure 6-1 Task list

6.1 Branching to other objects

By selecting the idea or the project entry with the right mouse button, the option to branch directly to the idea or the project appears.

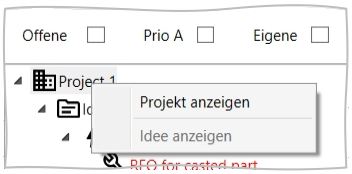


Figure 6-2 Despair

6.2 Acknowledgement of a task

Each task is assigned the status "completed", a
The comment and the date on which the report was closed .

Attachments such as sketches, images or PDFs (e.g. quotations) can be attached to each task.

7 Demo client

A DEMO client is always installed so that you can try out the various possibilities of EVI:ONE without risk.

You can access the DEMO client via the login screen by selecting the corresponding entry.

In den Stammdaten wird der Demo-Mandant mit einem Flag versehen.



Figure 7-1 Registration Demo-Man- dant

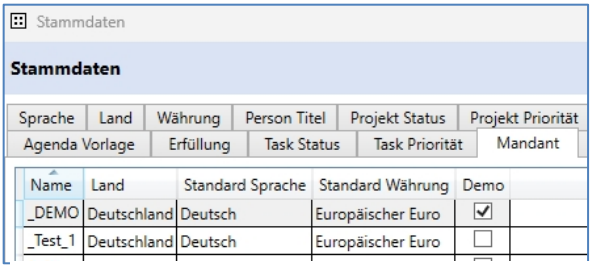
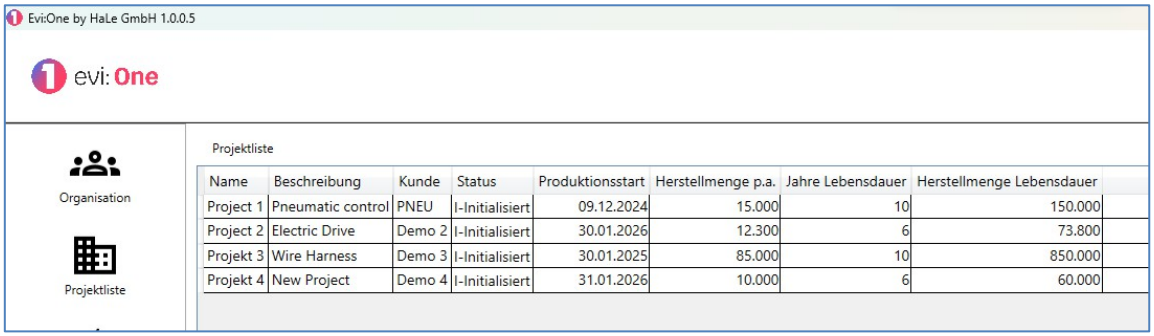


Figure 7-2 Labelling DEMO client

In the demo client, projects with ideas and tasks are created, which can be scaled and deleted as required.



Name	Beschreibung	Kunde	Status	Produktionsstart	Herstellmenge p.a.	Jahre Lebensdauer	Herstellmenge Lebensdauer
Project 1	Pneumatic control	PNEU	I-Initialisiert	09.12.2024	15.000	10	150.000
Project 2	Electric Drive	Demo 2	I-Initialisiert	30.01.2026	12.300	6	73.800
Projekt 3	Wire Harness	Demo 3	I-Initialisiert	30.01.2025	85.000	10	850.000
Projekt 4	New Project	Demo 4	I-Initialisiert	31.01.2026	10.000	6	60.000

Figure 7-3 Projects in the DEMO client

8 Directories

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