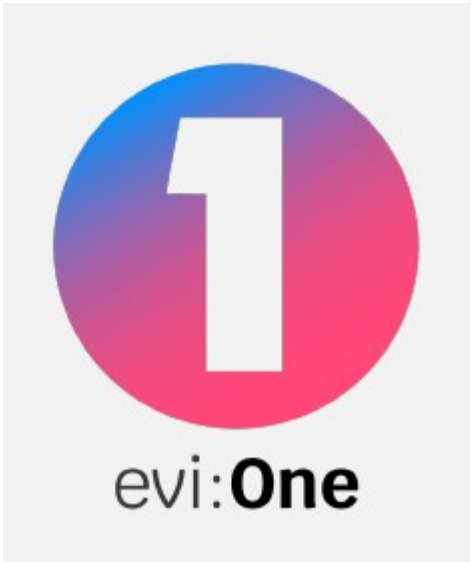
HaLe
The evi:One Company



Thinking tools
for moderators

Manual

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1 Introduction

Product and cost optimization is a fundamental part of any 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 optimization. Systematic team events generate ideas that are evaluated and classified into different categories.

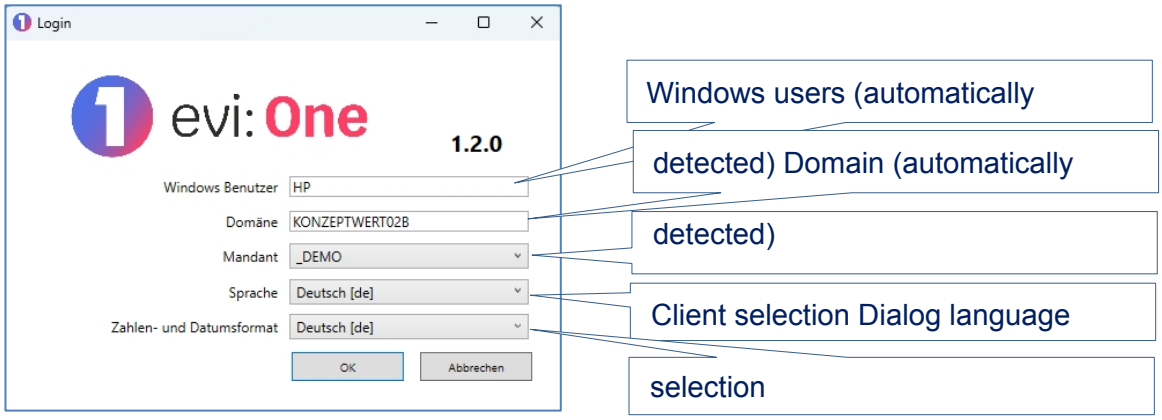
As the project progresses, these ideas are further refined, implemented, or supplemented. The result is a treasure trove of ideas that can be used within the company, but can also provide clues as to where further development and research should be carried out in order to enable further optimization.

To support this approach, provide the moderator with a powerful yet easy-to-use tool, and showcase the team's performance, evi:One is used in for teamwork.

1.1 Basic principles

evi:One is **multilingual** so that it can be used internationally. Furthermore, multiple clients can be managed.

This means that both medium-sized companies with a development department and internationally active OEMs with various development locations can promote and manage progress in idea generation.



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



1.2 Home

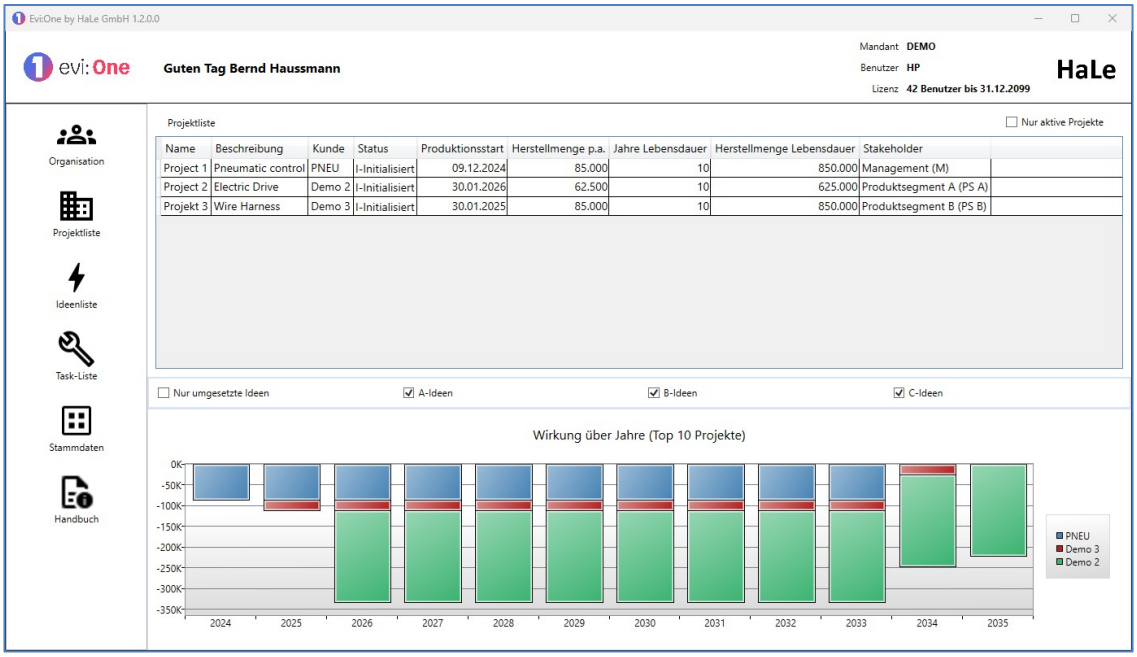


Figure 1-1 Home

The start page shows four areas

- TheHeaderTop
- TheProject list
- The navigation bar on the left
- The impact graphic

1.2.1 The header bar



Figure 1-2 Header bar

1.2.1.1 LOGO (Admin function)



The evi:One logo hides a function for administrators or for situations in which remote maintenance requires access to possible error messages. . This functionality should not be relevant to the user during 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 to pinpoint possible errors.

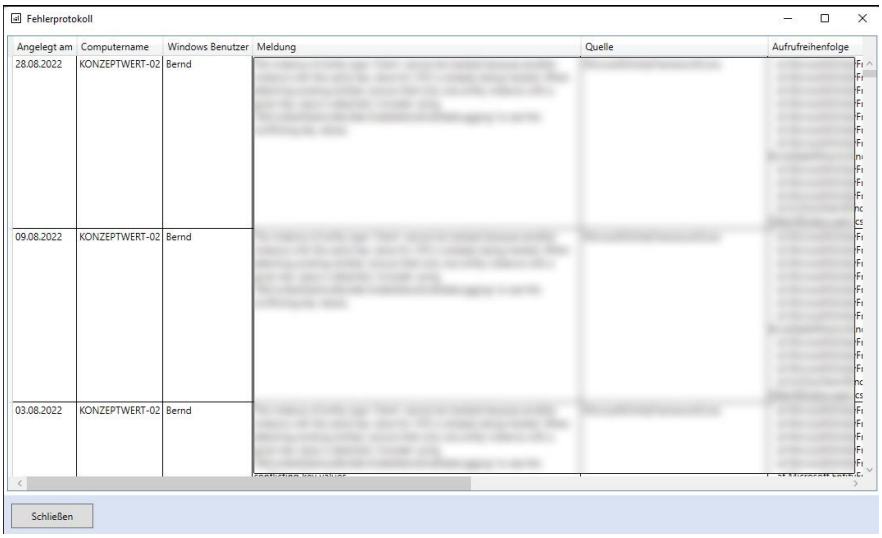


Figure 1-3 Error list

1.2.1.2 The status display



The status display shows the current client and the current user. It also shows the current license situation (in the example, 5 users are licensed until September 30, 2022).

1.2.2 The navigation bar



The navigation bar helps users directly access the dialog boxes they need for their project work. The individual dialog boxes are explained below.

The most important dialog boxes for users are the project list, the ideas list, and the task list.

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

2 Organization

To work quickly with evi:One, it makes sense to enter the most important project participants step by step, ideally in preparation for a workshop. Alternatively, a prepared template project could be imported.

This allows you to gradually display the organization (including logo) and assign the respective employees to the organizational units.

The assignment of rights is also regulated via the organization as the process continues.

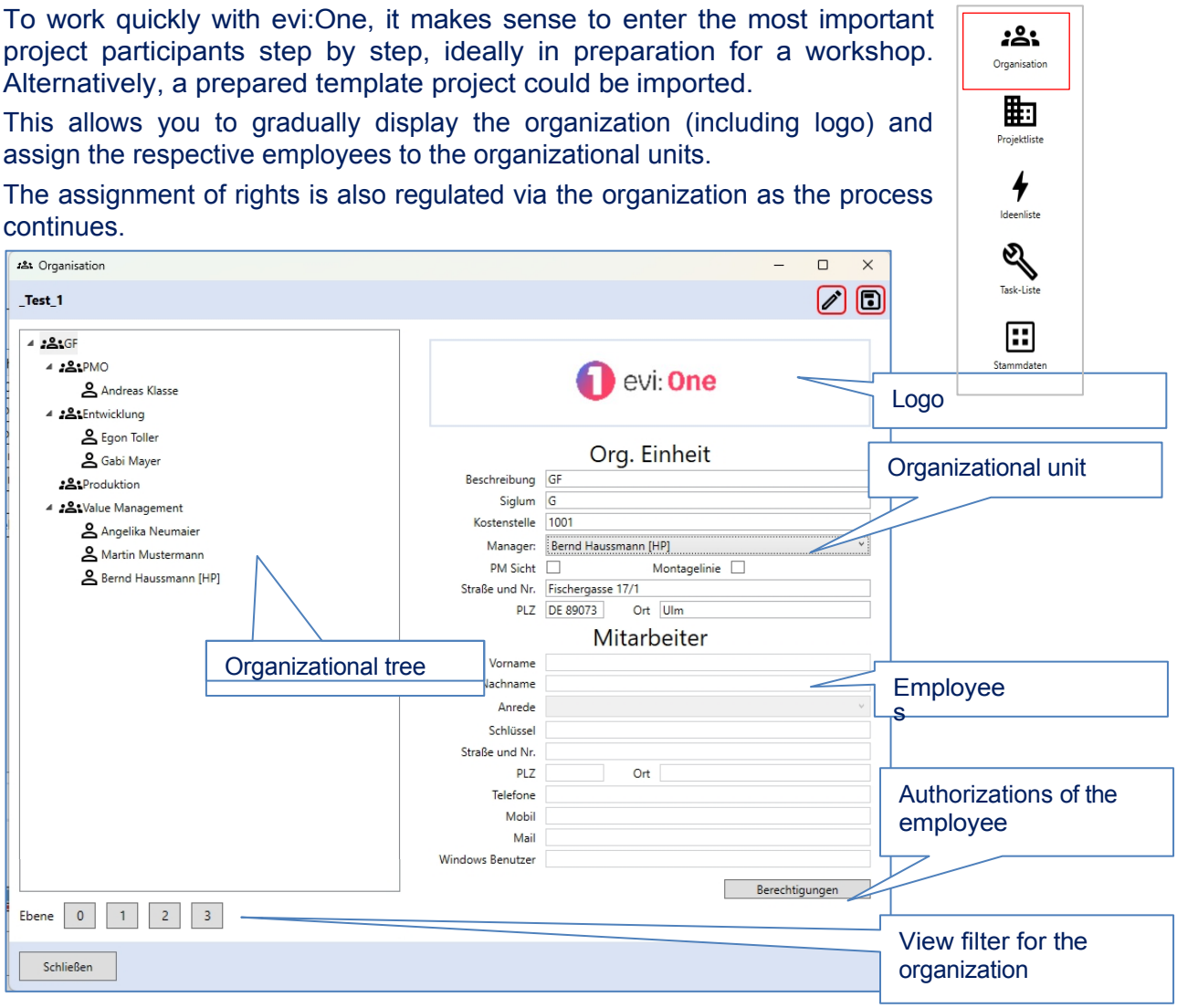
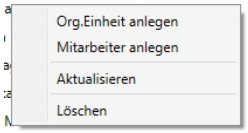


Figure 2-1 Organization

2.1 Organization

The organization can be created, expanded, or modified using the right mouse button in the organization tree. An organizational unit (OU) is always created below the OU that is currently selected. If no OU exists yet, the header is created.



Within the organization, stakeholders for projects should also be taken into account, as stakeholders are also queried for each project (see 4.1 Industrial Basic Data, page 11).

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

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

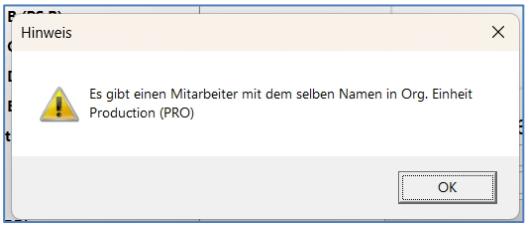
2.2 Employees

Employees are created within the OE. (right mouse button)

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

Since most employee data is maintained in other systems, it is recommended to enter as little as possible and as much as necessary. If tasks are to be transferred to a project management tool such as JIRA, the same identifiers (such as the email address) should be maintained (optional).

If two employees with the same name are to be created, a corresponding message (duplicate warning) is displayed. However, the new employee can still be created.



2.3 Permissions

Each employee can be assigned one or more roles. Each role reveals specific rights to individual dialog objects.

For example, the employee in the image ("Egon Toller") has been assigned the rights *Engineer* and *Task Response* so that he can access, read, and/or write in the various areas.

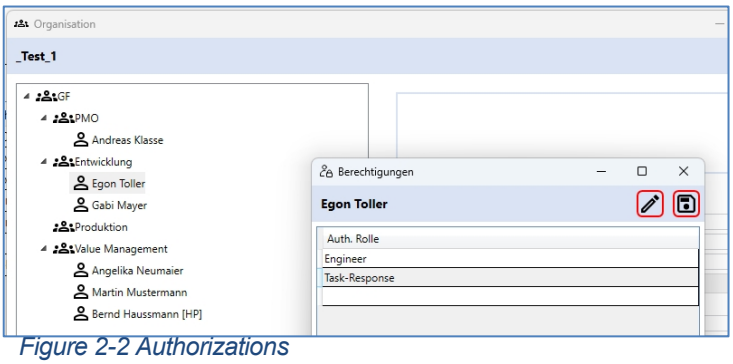


Figure 2-2 Authorizations

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

2.3.1 Master data – Roles

[only for administrators]

Roles can be defined in the Master Data section, under **the "Auth. Role" tab**. Each role describes access to an auth. object (AO) and the corresponding activity (AA) for it.

There are four AOs ("Project," "Idea," "Task," "Organization") and two AAs ("Edit," "Display").

An employee's individual rights are determined by the assignment of these roles to their authorization profile.

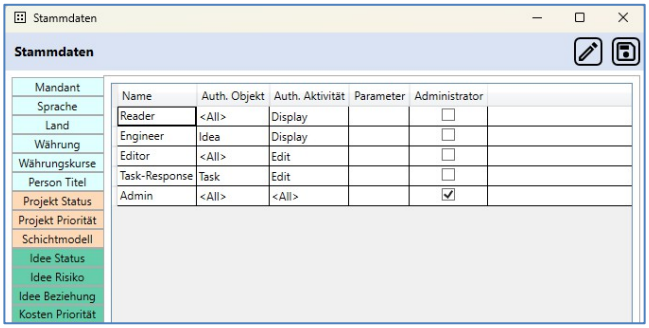
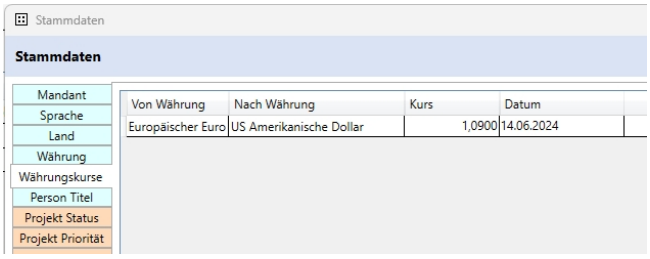


Figure 2-3 Master Data Authorizations

2.3.2 Master data – Currencies

A conversion table is available to enable projects to be carried out in different currencies. These entries should be maintained by appropriately trained employees.

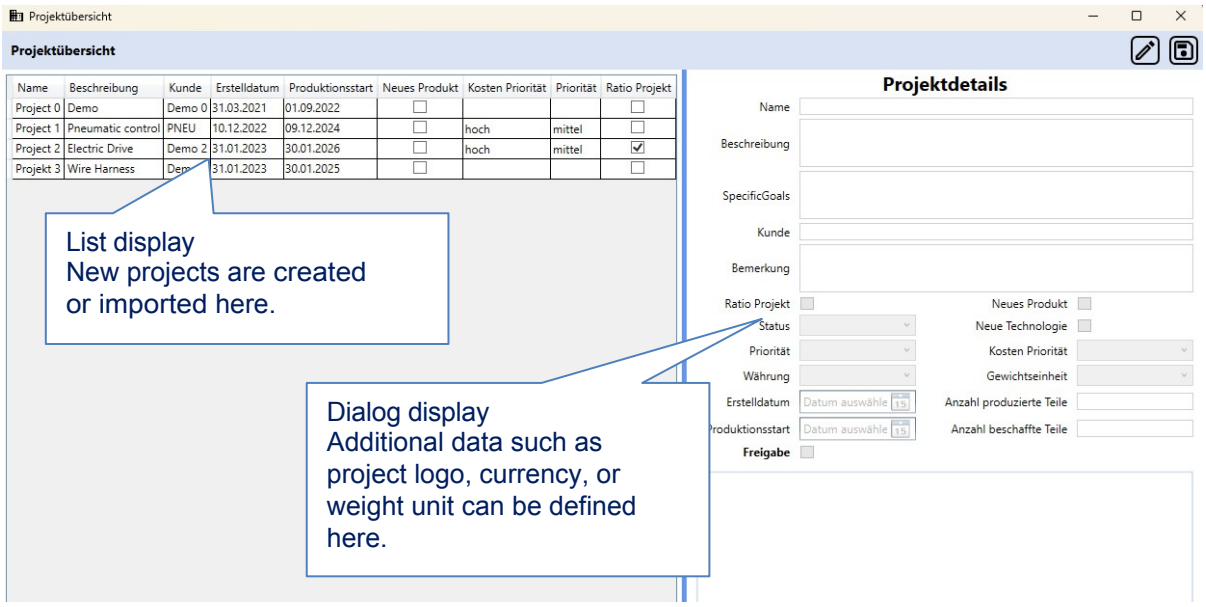
A change during a project **does not** result in the conversion of all amounts.



3 Project list

3.1 Project organization

Every organization carries out different projects with different priorities. In order to display the priorities in a coordinated manner and to carry out further project planning, the active projects are displayed in a list and by means of detailed data.

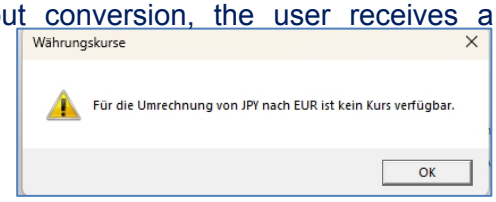


This application helps the project coordinator or steering committee assign moderators and experts to projects. Each project is described with significant key figures to make it easier for moderators and experts to get started with the project and to enable them to estimate the duration of the team event.

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 is done by entering the currency in the master data.

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

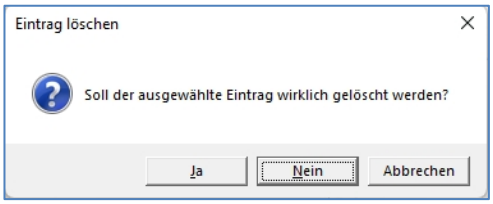


⇨ However, if the project currency is changed at a later date,
No conversion. Therefore, please use this setting with caution.

⇨ If the weight unit is changed during the project, no conversion will take place either.

Double-clicking on the project entry in the list will take you directly to the respective project.

You can also delete a project here. A warning will appear, after which all elements associated with the project will be deleted.



Depending on the license, entries such as ideas, project FMEA, product FMEA, related actions, etc.

3.1.1 Importing and exporting projects

In this dialog, it is also possible to import or export projects. This function can be helpful, for example, when preparing or applying so-called template projects.



.

A template project can, for example, be pre-filled with typical team members or meeting sequences, which then only need to be adjusted to the timeline.

When importing, the currency and weight unit are also imported. The product tree is also imported.

4 Projects

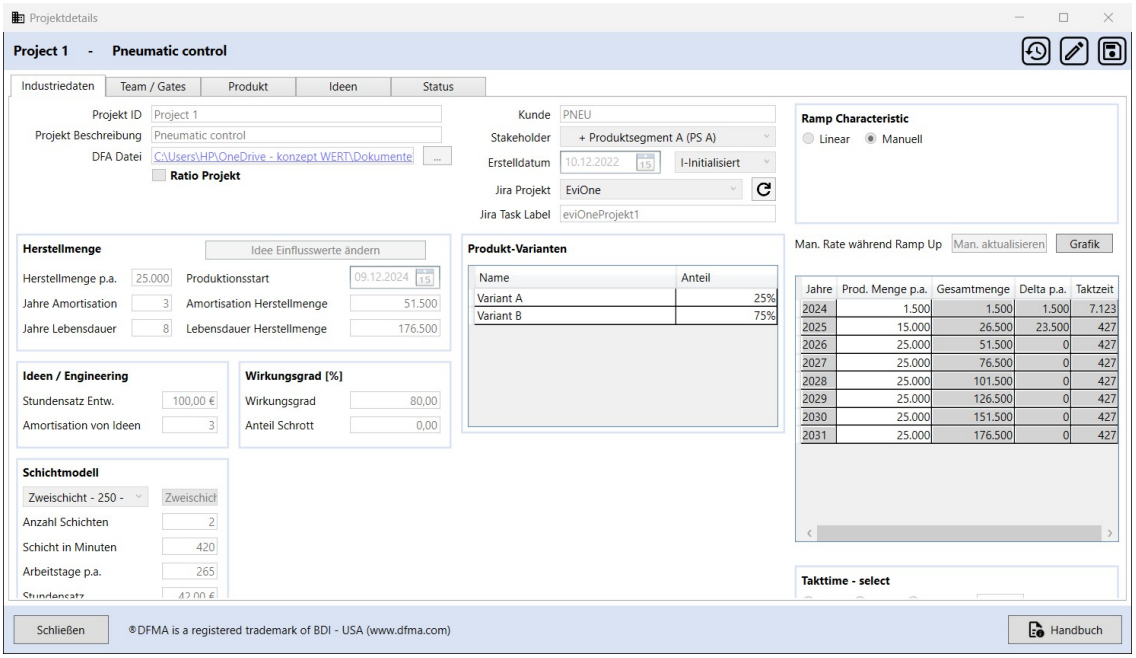
The basis of evi:One is the project.

Each project collects the relevant optimization data for processing and subsequent tracking of open actions related to ideas or risks.

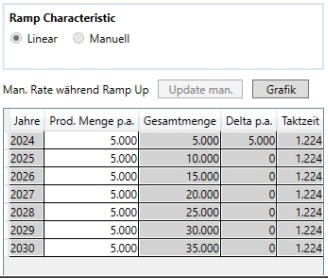
4.1 Basic industrial data

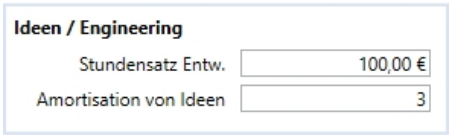
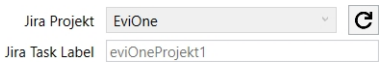
Each industrial project has specific key figures that influence how the upcoming "decisions" that must/may be made by the project team or project manager will turn out.

Figure 4-1 Project details – industrial data



The following factors are important for cost-related decisions.

a) The production quantities of the product over its life cycle, but also over the amortization period.	
b) The distribution of quantities over the lifetime to protect the customer cycle time (in seconds)	

c) The shift model and the efficiency of the production system (for determining the cycle time) There are three models available that can be adjusted manually.	 *Figure 4-2 Shift model*
d) The hourly rate for necessary unplanned adjustments for the realization of ideas	 *Figure 4-3 Basic data development*
e) A variant description to assign the ideas/scenarios to one or more variants, if necessary. e.g., "market share" or, in the case of automobiles, the proportion of "right-hand drive" vehicles. No plausibility check is performed.	 *Figure 4-4 Variants*
f) JIRA connection With an (optional) connection to JIRA, the corresponding JIRA project can be selected after setup and assigned an identifier.	

4.2 Team and Milestones/Gates

Every project is carried out by people. Each project member fulfills a specific role, contributes skills and experience, and is responsible for one or more specific decisions.

g) Specific member lists can be created for projects. The function/role of each member can be specified when naming them. h) If employees leave the project, simply remove the "Active" check mark.	 *Figure 4-5 Team members/roles*
i) Project roles are used in other modules	

j) Each team meeting is documented with the date and title.

Datum	Besprechungstitel
29.08.2022	Loop 2
10.10.2022	Loop 3
26.09.2022	Preliminary Design Review
28.07.2022	Vorbesprechung
25.10.2022	Loop 4
16.08.2022	Loop 1

k) Double-clicking on a single entry provides further documentation options for optimal project moderation.
   l) Participants
   m) Agenda
   n) Expectations
   o) Feedback
   p) Tasks for discussion
   q) Idea status
   r) Lessons learned

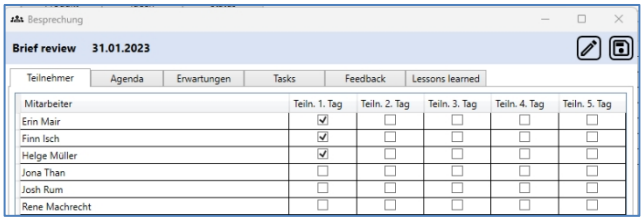


Figure 4-6 Meeting details Participants

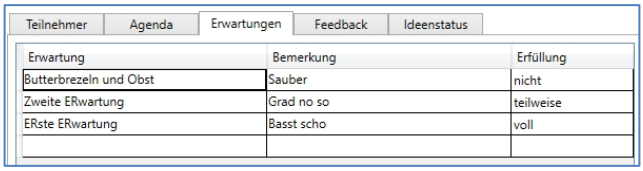


Figure 4-7 Meeting details Expectations

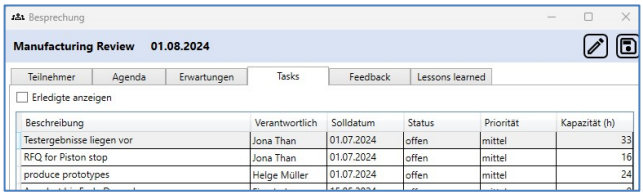


Figure 4-8 Meeting details Tasks

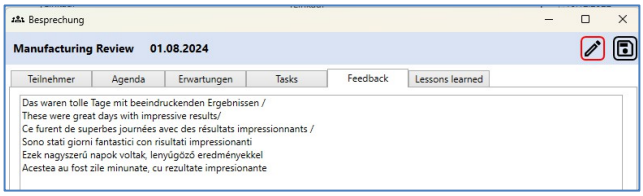


Figure 4-9 Meeting details Feedback

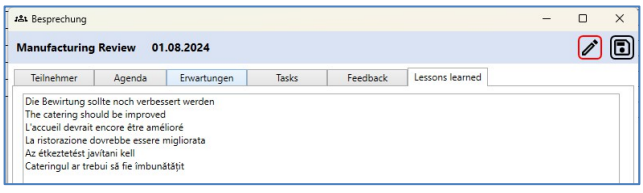


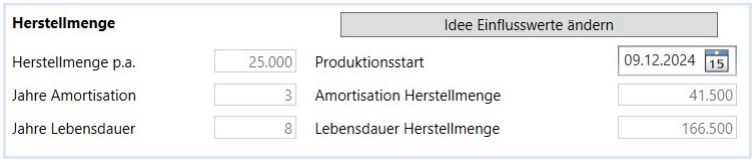
Figure 4-10 Meeting details Lessons learnt

The meeting details Lessons learnt are not included in any report. They are only for the moderator(s) to reflect on.

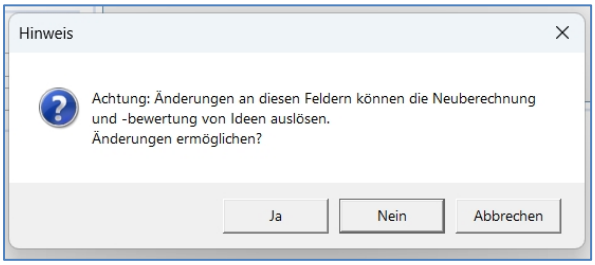
4.3 Changes in unit numbers

Sales scenarios may change during the course of a development project. This raises the question of which of the ideas generated will still be profitable or even turn negative.

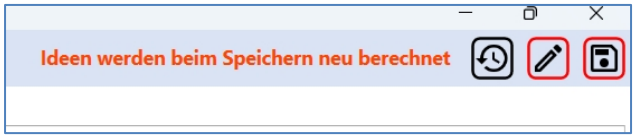
The starting point for a quantity change is the "Change idea influence values" button.



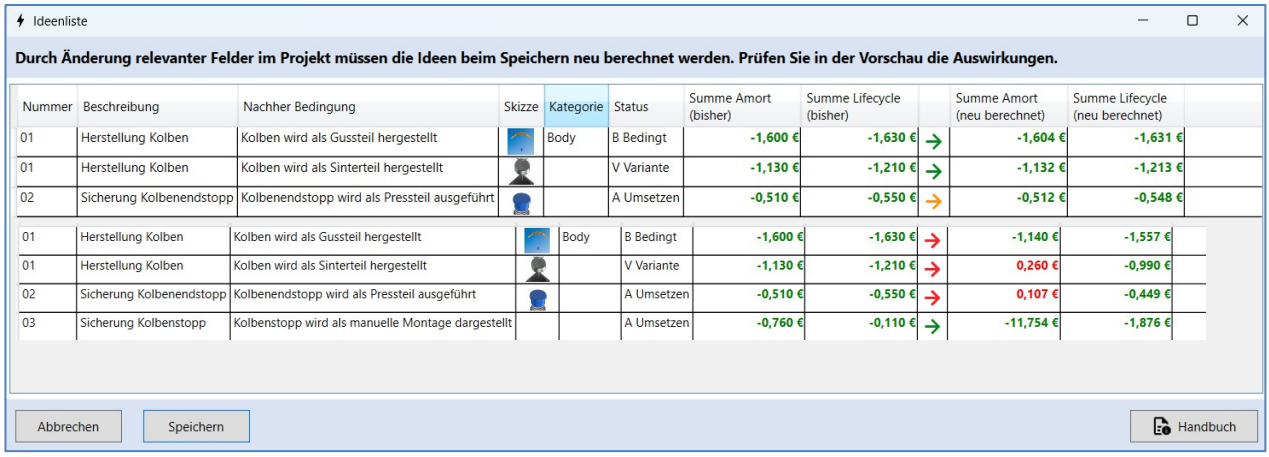
The underlying figures can only be changed after this "approval" and a corresponding note has been made.



After the base figures have been calculated, the warning message is displayed in the upper right corner.



After saving, a dialog box opens showing the calculation of the ideas with the new figures.

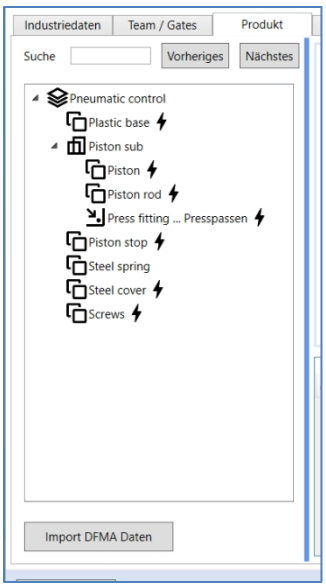


Both the previous and new figures are displayed for each idea. The indication arrow shows whether and how an idea has changed. (Red= worsens, yellow= remains neutral, green= improves.

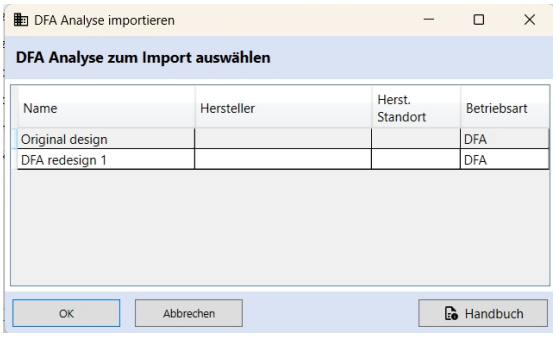
The new figures are adopted when you save.

4.4 Product

When working with DFMA, it is helpful to import the data for further idea processing. Clicking on "Import DFMA data" opens the selection window for selecting the



select the correct DFA file.



After selection and confirmation, the data is imported accordingly.

The data is now available in evi:One.

4.5 Ideas

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

Ideas can be documented, developed, and managed in evi:One. Within a
The project has an "Ideas" tab for processing ideas.

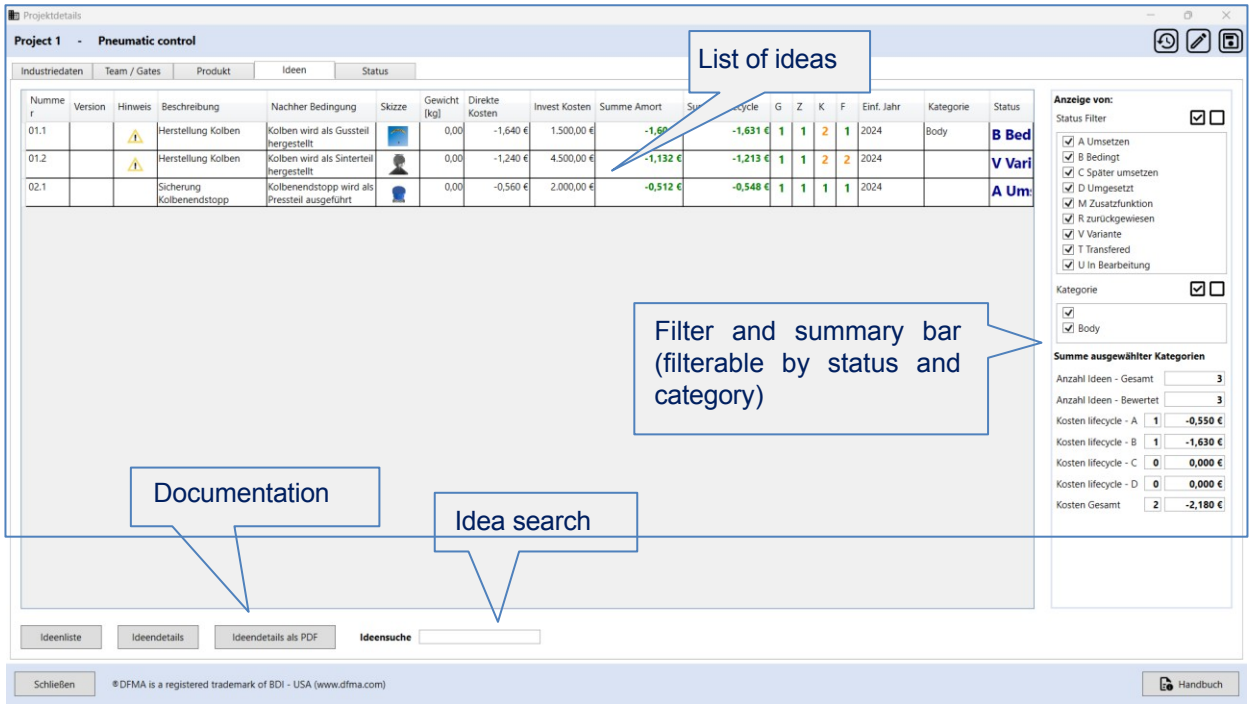


Figure 4-11 List of ideas in the project

Each idea can either be added to the **list of ideas** as a simple entry or elaborated in detail.

A simple entry includes the following information:

- Number (recommended: sequential)
- Version (for multiple versions of an idea)
- Before
- Weight loss
- Change in investment costs
- Status
- Description (of the idea)
- After
- Change in direct costs
- Year of introduction

The fields "Total amortization" and "Total lifecycle" are generated automatically

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

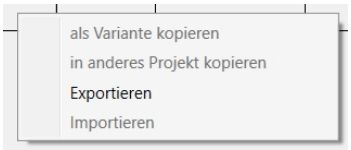
If there are several ideas for a specific product item (whereby only one idea can ultimately be implemented), these ideas can be assigned a version.

Double-clicking on an entry in the list of ideas opens the editing window for detailed elaboration of the idea.

If you want to search for or filter ideas, you can use the selection list on the right and the free text search. This functionality is interactive, i.e., it is possible to filter first and then search.

The summary bar is controlled by the categories.

4.5.1 Duplicate, copy, import/export ideas



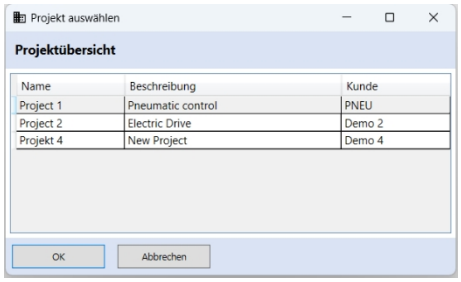
By right-clicking on an idea, it is possible to duplicate it as a variant, copy it to another project, or export it.

The import of other ideas is also initiated here.

a) Copy as variant
Ends with the message that the copy of the idea is saved in the description with the addition "(copy)".



b) Copy to another project
This is done using the selection field for other active projects:



By selecting and clicking OK, the idea is copied to the selected project.

c) Export
Clicking Export opens the Windows "Save As" dialog. Select the directory and name the idea, and it will then be available as an XML file.

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

4.5.2 Idea editing

4.5.2.1 Detailed idea development

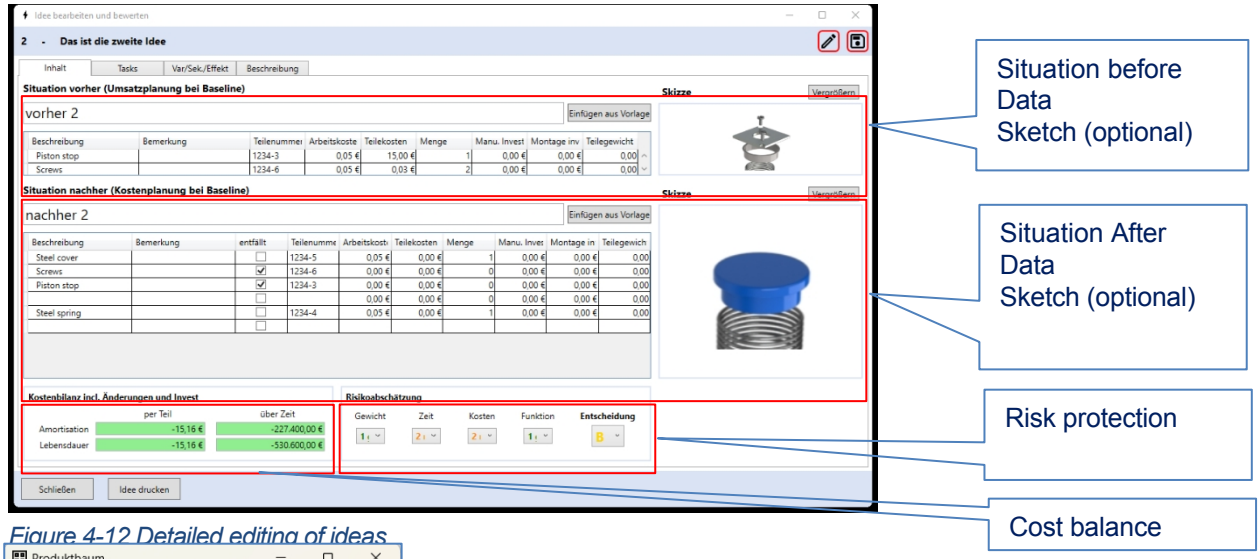
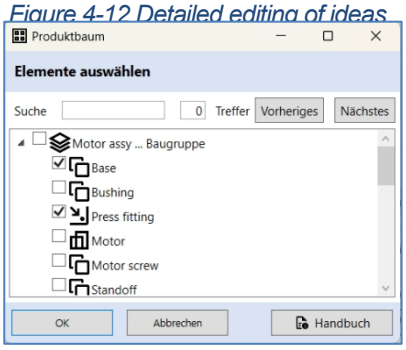


Figure 4-12 Detailed editing of ideas



If the "Producttree light" module has been licensed, the data can be selected from the product tree with a simple click and imported into the idea.

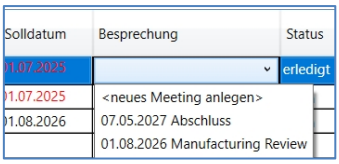
4.5.2.2 Tasks for the idea

We do not want to engage in micromanagement.

Tasks should be recorded with the person responsible in order to keep track of progress and to be able to manage the tasks in the event of special circumstances (illness, change, termination, etc.).

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

The target date is preset to x days after the date of entry and can be changed. (x can be set in the settings). Alternatively, a scheduled meeting can be selected, or a new meeting can be scheduled by defining a date and selecting <create new meeting>.



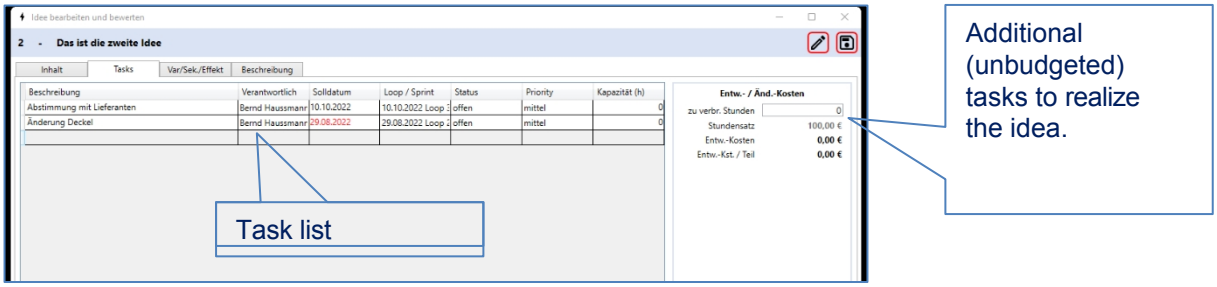


Figure 4-13 Tasks related to the idea

4.5.2.3 Variants / Secondary effects

There are three possible options when developing ideas.

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

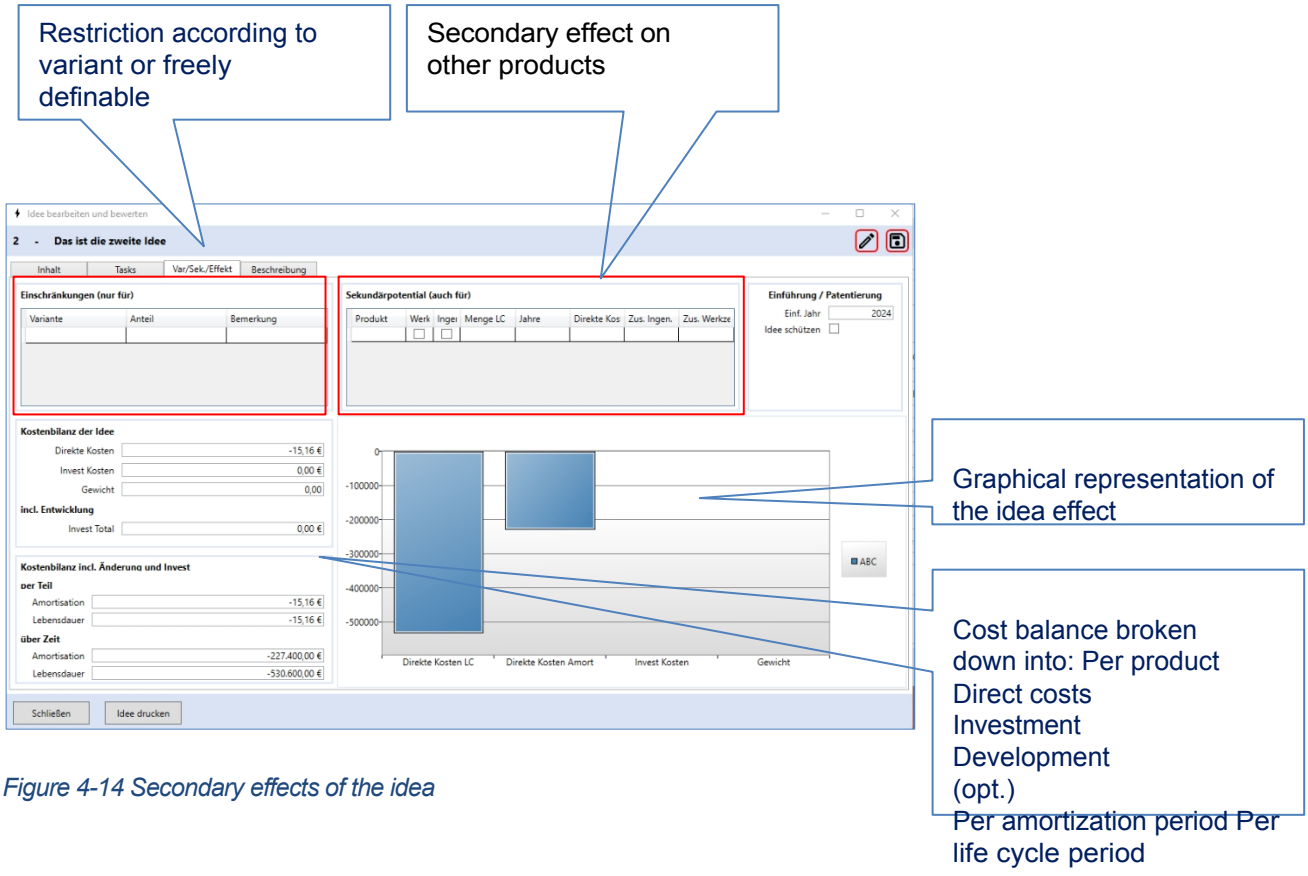


Figure 4-14 Secondary effects of the idea

4.5.2.4 Description

In the "Description" tab, additional information can be added for each idea.

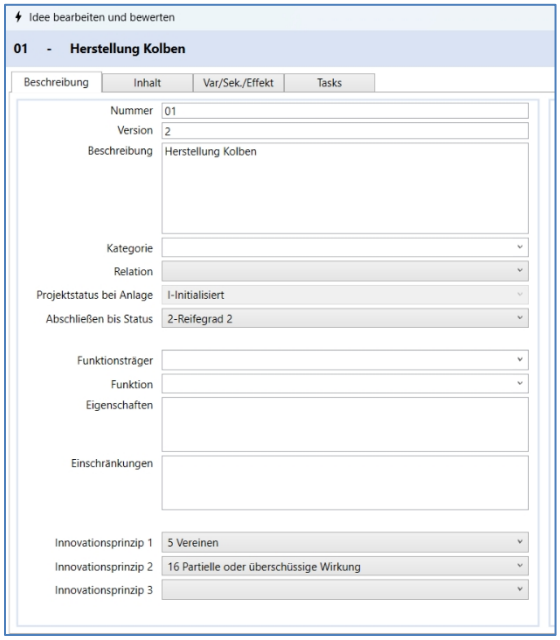


Fig. 4-15 Description and category of an idea

The description can be supplemented with the following information:

Category for grouping ideas (free classification possible)
Relation (is this an opportunity or a risk)
The **project status** in which the idea was recorded (default setting is initially I = Initialized)
Expected completion of the idea (this field is open in evi:One Basic)

Function bearer: Ideas can be assigned to function bearers here. (free classification possible)

Function: Ideas can be assigned to functions here. (free classification possible)

Properties: Free text about the idea

Restrictions: Free text about the idea

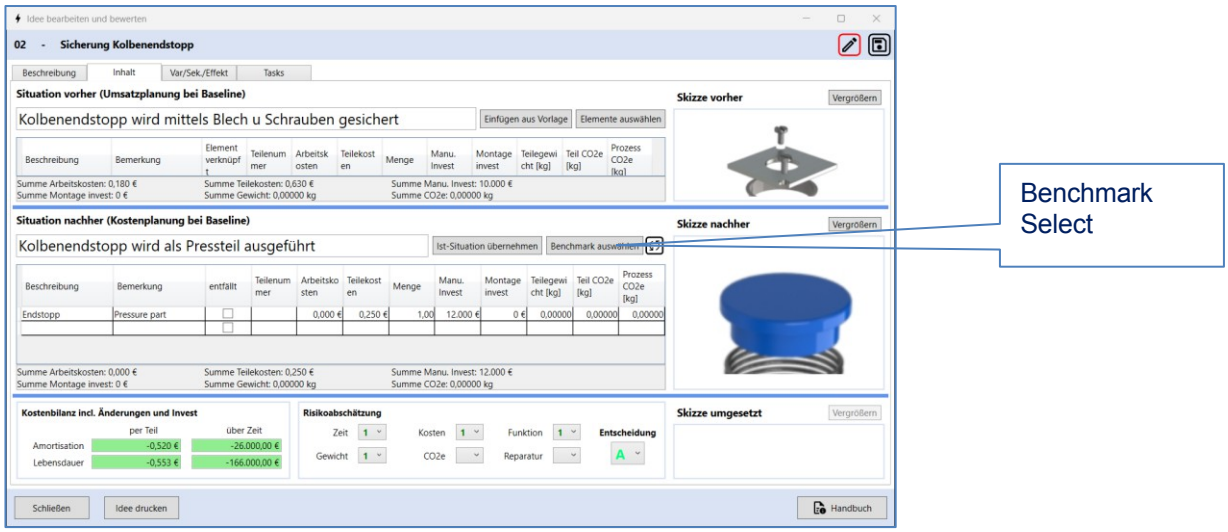
Innovation principle 1-3: Assignment to innovation principles from the TRIZ methodology

4.5.2.5 Benchmark functionality

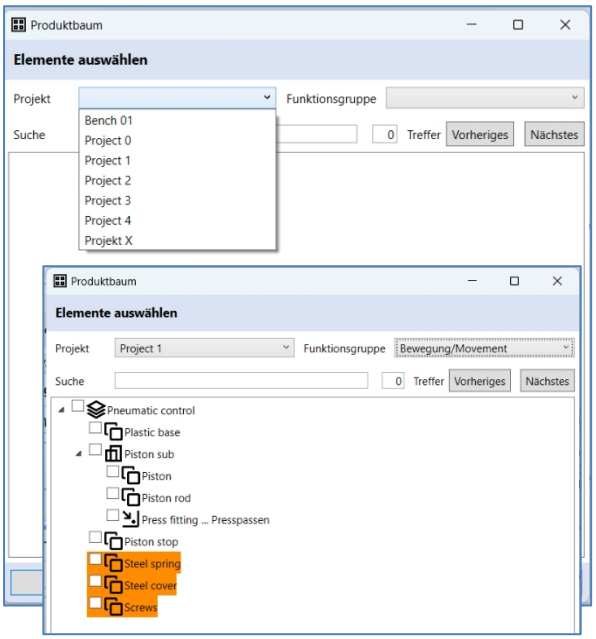
When working with function carriers and functions in particular, a special evi: function can be used to generate and develop ideas.

If the function carriers of two products are to be compared, the components and operations belonging to this function carrier can be easily generated.

When developing ideas, you can also draw on components from other projects.



Clicking opens a dialog box that gives the user access to all projects and product trees.



This allows effective access to individual components and operations, particularly when conducting competitive and market analysis.

After selecting the project, the product tree is constructed. After selecting the function group (synonym for function carrier), all components and operations assigned to this function carrier are highlighted in color.

By selecting and clicking OK, the entries are copied to the target situation of the idea.

4.6 Status

During the course of the project, it is usually important for the project manager to know what options are still available for their project. This snapshot can be viewed in the "Status" tab.

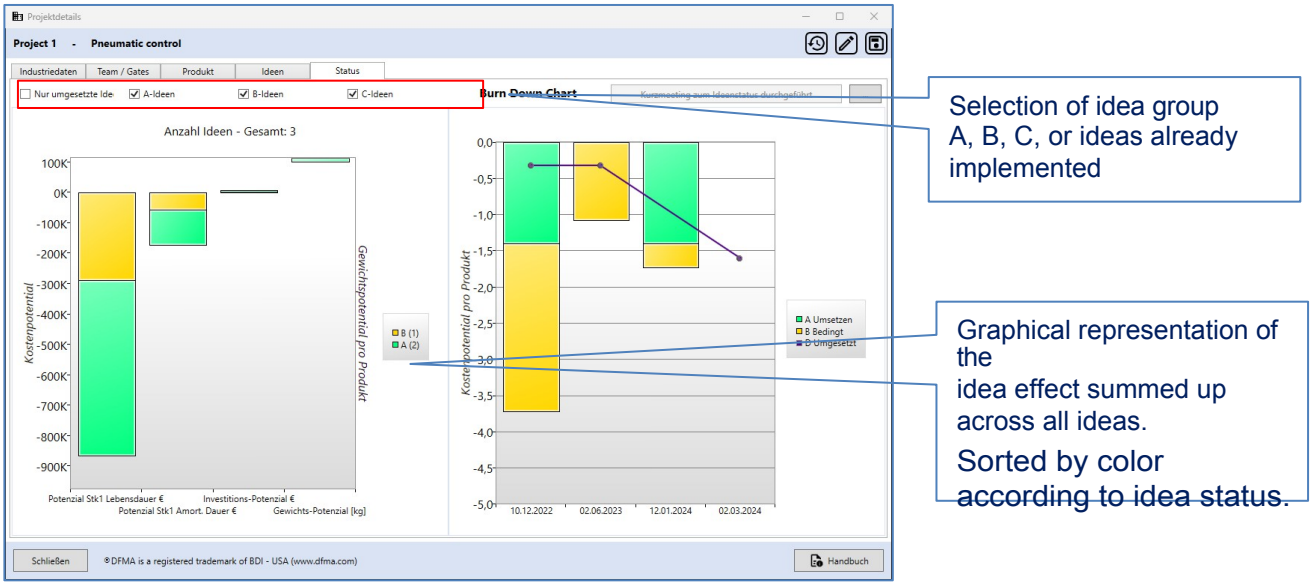


Figure 4-16 Idea status of a project

5 List of ideas

To enable searching and editing of ideas without having to open the project each time, this can be done via the idea list.

Before editing, you first need to use the SEARCH function.

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

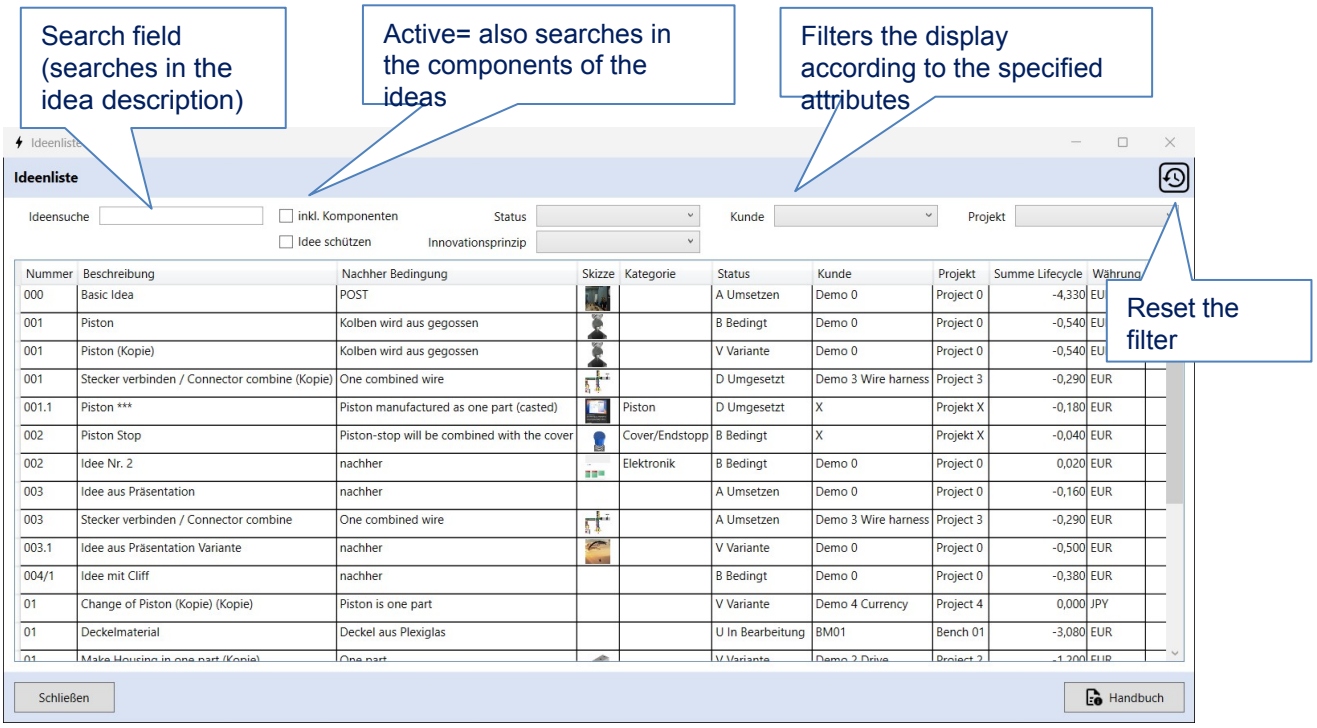


Figure 5-1 List of ideas

Double-clicking on an entry opens the selected idea directly.

Over time, a library of ideas will be created, which will be helpful for new or younger colleagues, among others.

6 Task list

To get an overview of the tasks documented for the ideas, you can open the task list. It is divided into two areas.

On the left is the **task tree**, which displays all tasks for all projects and can be efficiently reduced using the filter function.

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

Feedback is also provided there.

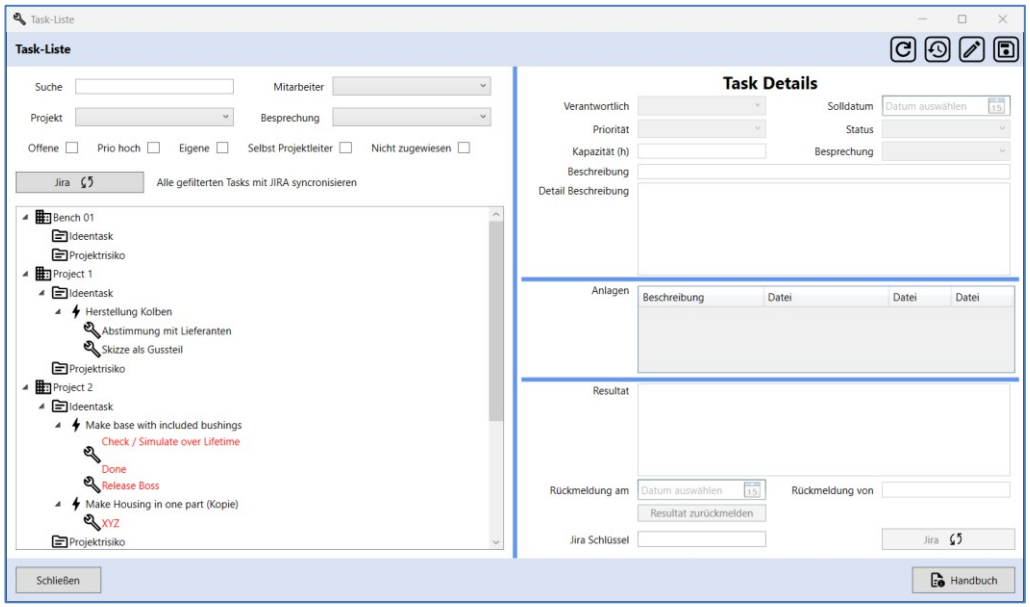


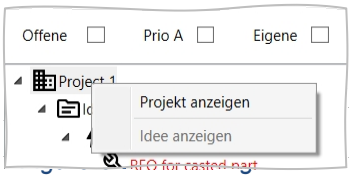
Figure 6-1 Task list

If the **JIRA connection** function has been licensed, all tasks selected by the filter can be synchronized in a batch process.

The settings for the JIRA connection are handled separately.

6.1 Branching to other objects

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



6.2 Feedback on a task

Each task is closed by selecting the status "completed," a feedback comment, and the feedback date .

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

7 evi:Inno

Especially in the early design phase, when technical or physical contradictions become apparent, there are ways to resolve these contradictions using appropriate innovation principles. (TRIZ)

The data provided in evi:Inno is always kept up to date through a license cooperation with Systematic Innovation® . Some of the explanations were created in collaboration with the TRIZ Consulting Group.

The application of Creative Contradiction will be explained in more detail during a training session.

In short: By combining both improving and deteriorating features, innovation principles are identified that have proven successful in this combination to date (determined from the analysis of millions of patents). These principles can then be applied to the "resources" of the system. The strength of the innovation principle is generated from the order of naming in the matrix. The stronger it is, the more frequently it was named in the analyzed patents.

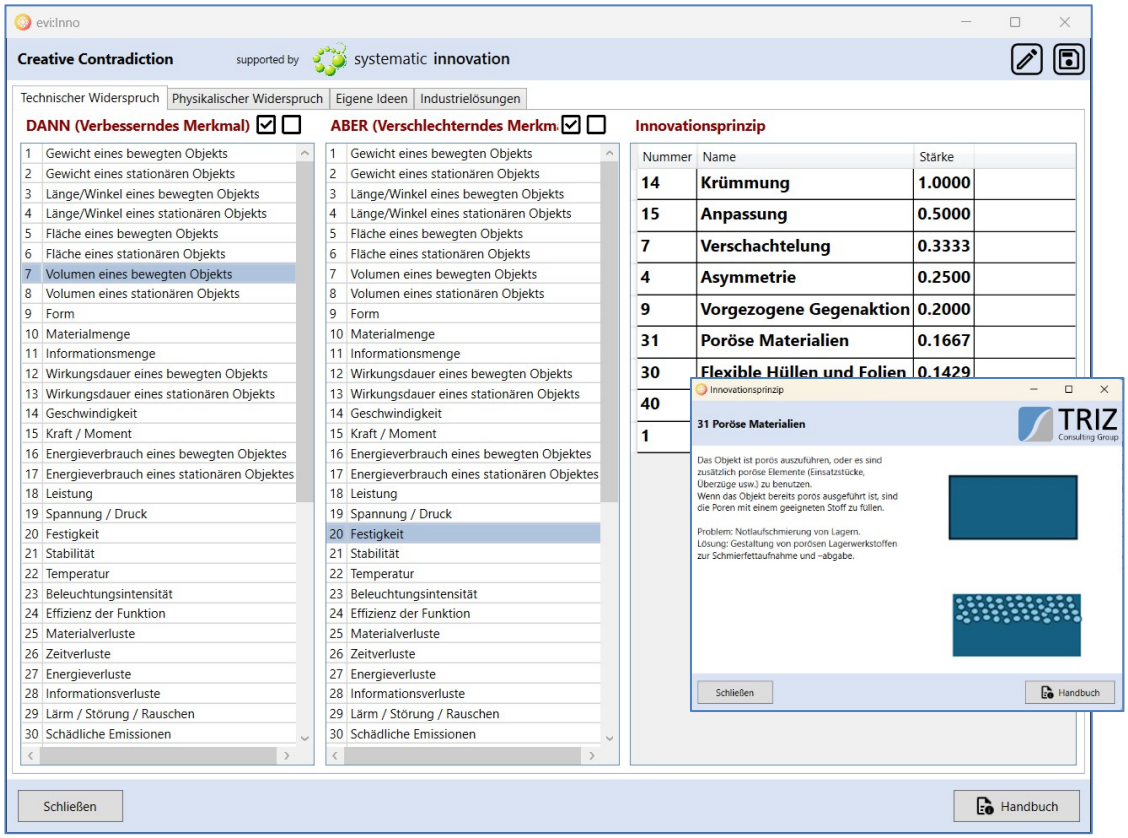
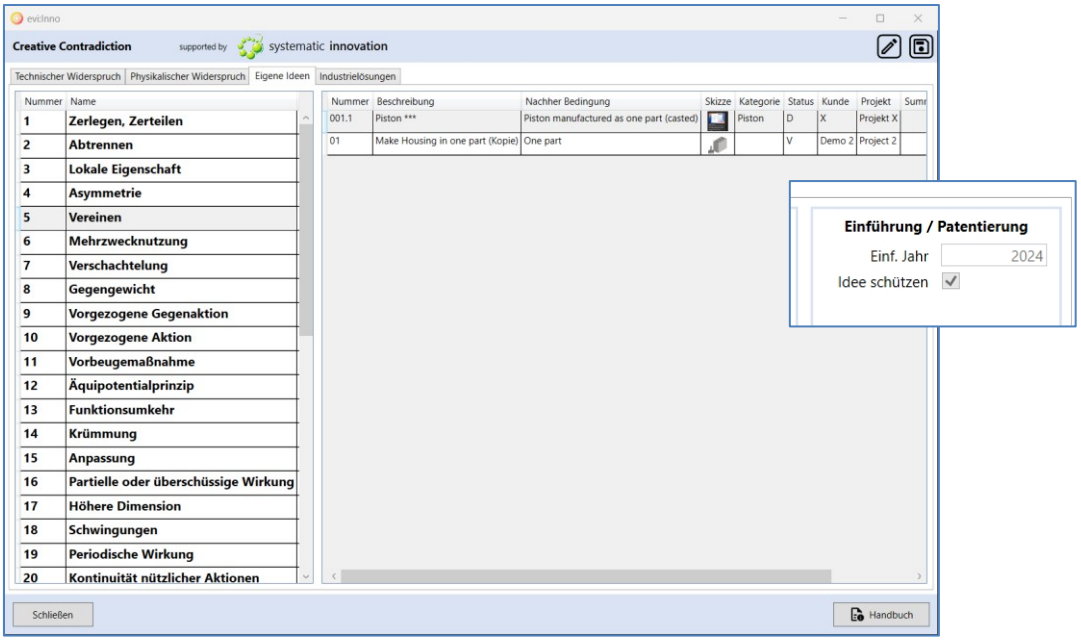


Figure 7-1 Contradiction matrix

7.1 Knowledge management

In order to store good ideas from the organization and make them available to other colleagues, they can be assigned to the above-mentioned innovation principles.

To do this, the idea can be declared as "Protect idea" in the "Var/Sec/Effect" tab. It is then possible to assign the idea to three innovation principles in the "Description" tab.

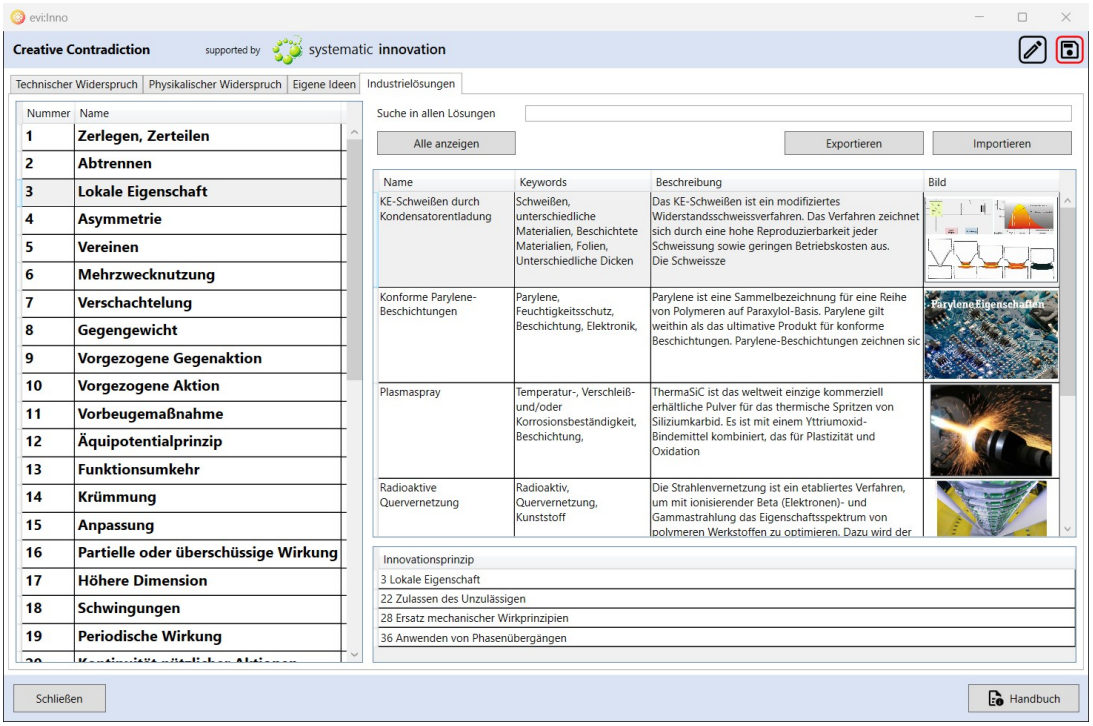


The idea can be opened by double-clicking on it.

"Lessons learnt" are actively organized here as ideas and experiences and used for the further development of the organization.

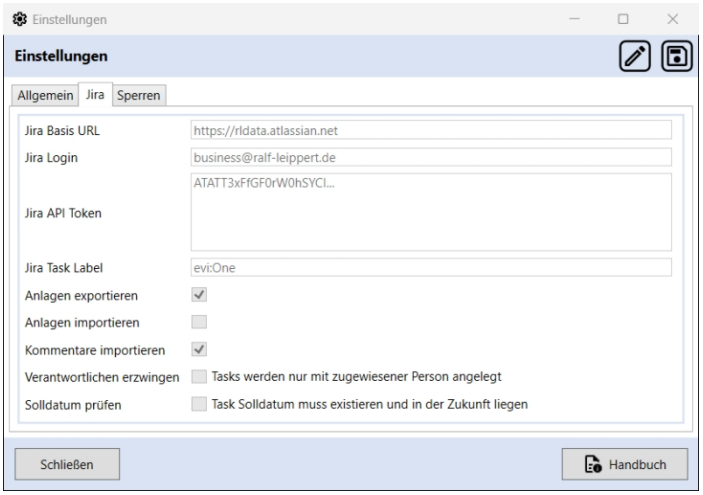
7.2 External knowledge / Virtual trade fair

Ideas are also generated outside the organization. When licensing evi:Inno, new technologies are regularly synchronized and assigned to innovation principles.



8 Settings

Various functions can be specially configured for the experts at evi:One.

General: Ideas Variants	The addition of the different variants can be set using the calculation logic.
General: Idea decimal places	Sets the number of decimal places in the idea.
Tasks: Default selection	If set to "TRUE," the task is automatically assigned to the next project meeting (unbarred) If set to "FALSE," the task is assigned by the moderator assign the task
Tasks: Standard target date	For tasks, today's date is set as the target date + the set number is preset (underbar)
JIRA	
JIRA base URL	Connection to the JIRA application
JIRA LOGIN	Login address for the JIRA application
JIRA API Token	Connection ID to JIRA
JIRA Task Label	Provided when exchanging tasks to identify the tasks
Export attachments	If "TRUE," the attachments are exported from evi:One
Import attachments	If "TRUE", attachments are imported from JIRA into evi:One
Import comments	If "TRUE", comments are imported from JIRA
Enforce responsible persons	Tasks are only created in JIRA if the ID in evi:One and JIRA are identical.
Check target date	The target date must exist and be in the future.
Use integrated reports	If YES, the internal reports are used; if NO, the old SQL report reports are still used.

9 Demo client

To try out the various options offered by evi:One without any risk, a DEMO client is always installed.

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 9-1 Demo client login

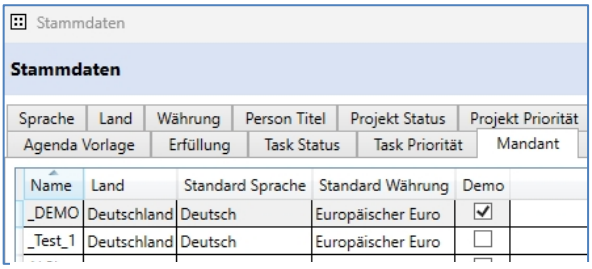


Figure 9-2 DEMO client label

The demo client contains projects with ideas and tasks that can be modified and deleted as desired.

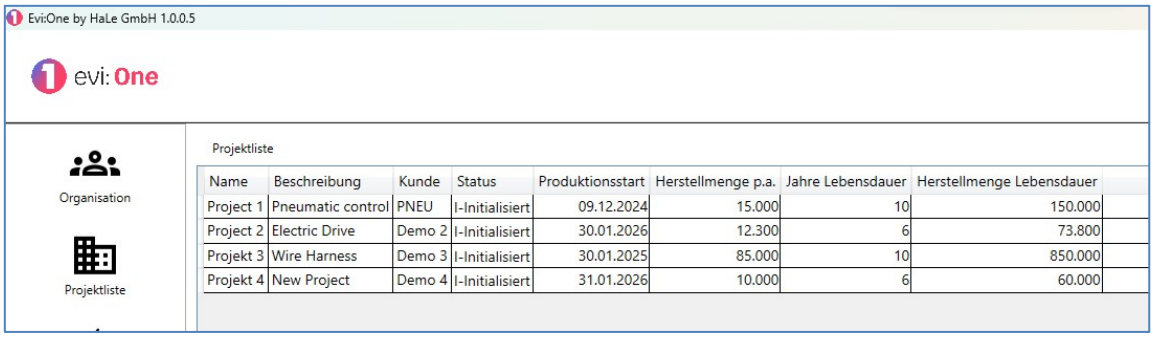


Figure 9-3 Projects in the DEMO client

10 Directories

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