

evi:one

Thinking tools
for facilitators
Thinktools
for facilitators

Manual

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1 Introduction

Product and cost optimisation 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 optimisation. Systematic team events generate ideas that are evaluated and classified into different categories.

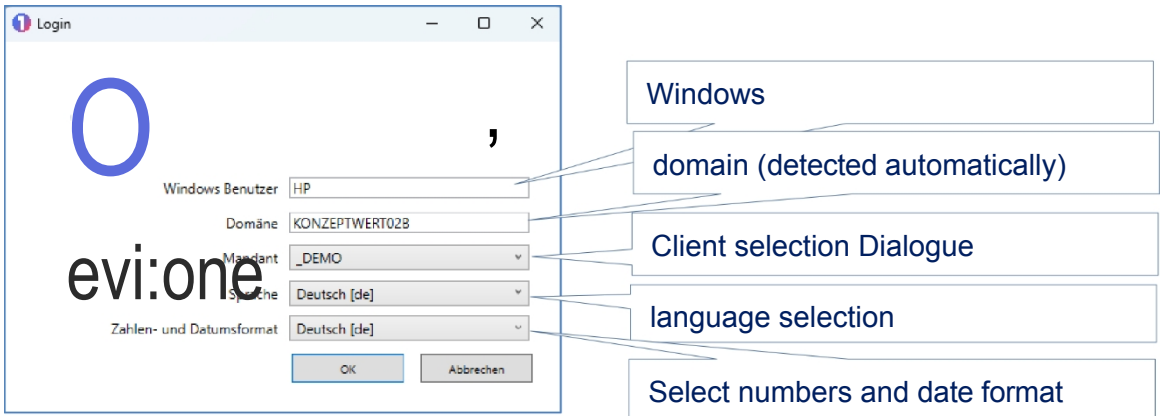
As the project progresses, these ideas are further refined, implemented or supplemented. The result is a treasure trove of ideas that can be used within the company, but can also provide clues as to where further development and research should be carried out in order to enable further optimisation.

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

1.1 Fundamentals

EVI:0NE 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 dialogues are generally locked for editing. To edit the data, there is

g Below the menu, there are two buttons for editing and saving.

1.2 Home

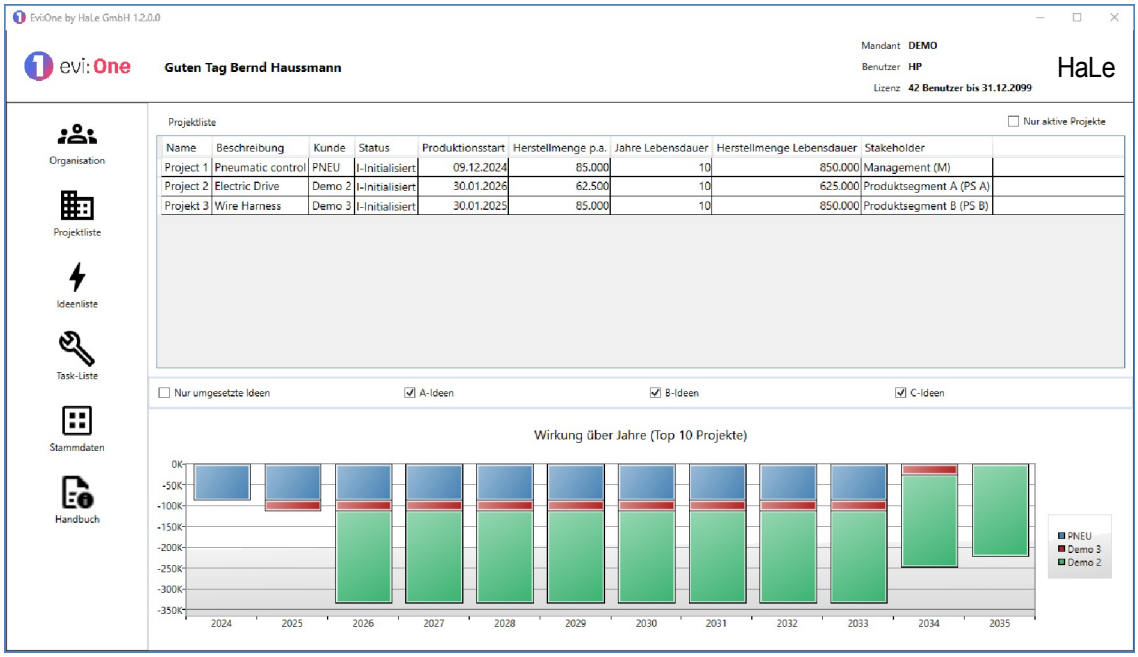


Figure 1-15

The home page shows four areas

- The header bar at the top
- The project list
- The navigation bar on the left
- The impact graphic

1.2.1 The header bar

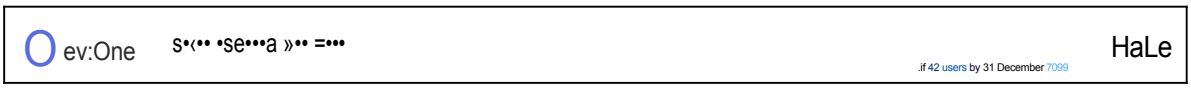
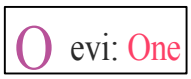


Figure 1-2 Connection bar

1.2.1.1 L0G0 (Admin function)



The EVI:ONE logo conceals a function for administrators or for situations in which remote maintenance may encounter error messages.

For the user, this functionality should not play a role in daily 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 track down possible errors in a targeted manner.

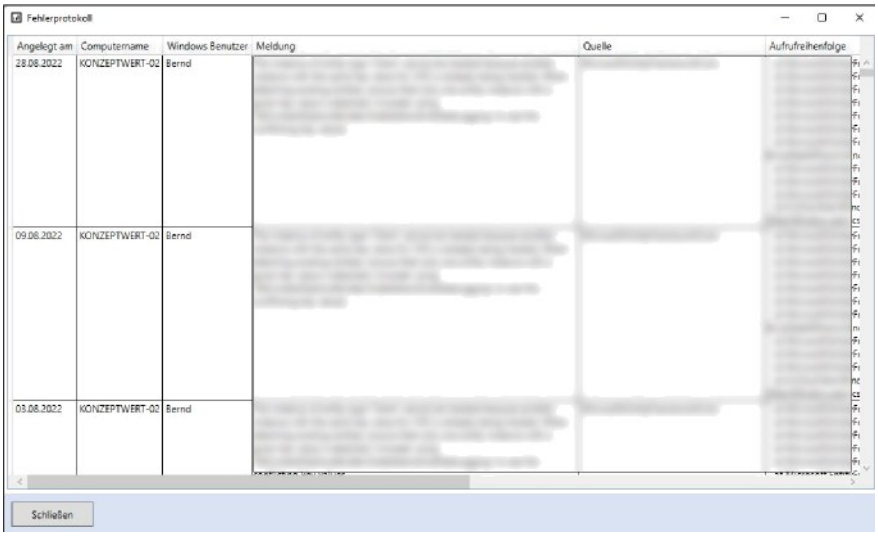


Figure 1-3 Error list

1.2.1.2 The status display

- HaLe

42 User b's 3 12.20g9

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

1.2.2 The navigation bar

.

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

Projektlis

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

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

2 Organisation

Um mit EVI:ONE schnell zu arbeiten ist es sinnvoll, die wichtigsten Projektteilnehmer schrittweise, idealerweise als Vorbereitung zu einem Workshop zu erfassen. Alternativ könnte ein vorbereitetes Vorlagenprojekt importiert werden.

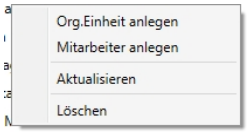
Die Organisation (incl. Logo) lässt sich so schrittweise darstellen und die jeweiligen Mitarbeiter zu den Organisationseinheiten zuordnen.

Auch die Rechtevergabe wird im weiteren Verlauf über die Organisation geregelt.



Abbildung 2-1 Organisation

2.1 Organisation



Die Organisation kann über den Organisationsbaum per rechter Maustaste angelegt, erweitert oder verändert werden. Eine Organisationseinheit (OE) wird immer unterhalb der OE angelegt, die aktuell markiert ist. Sollte noch keine OE existieren, wird der Kopf angelegt.

Innerhalb der Organisation sollte auch die Stakeholder für Projekte berücksichtigt werden, da zu jedem Projekt (Siehe 4.1 Industrielle Basisdaten Seite 10) auch der Stakeholder abgefragt wird.

Für jede Organisationseinheit kann auch die **postalische Adresse** angegeben werden. Dies ermöglicht das Reporting aufgeteilt nach geografischem Attribut (z.B. Potenziale aller Nordwerke o.ä.)

Das Logo lässt sich per Dateiauswahl (rechte Maustaste) aus einer üblichen Grafikdatei importieren.

2.2 Employees

Employees are created within the 0E. (right mouse button)

Employees can be named freely, 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 (e.g. email address) should be maintained. (optional)

2.3 Permissions

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

For example, the employee in the image ("Egon Toller") has been assigned the rights 6np/neerund *Task-Pesponse* so that they can access, read and/or write in the various areas.

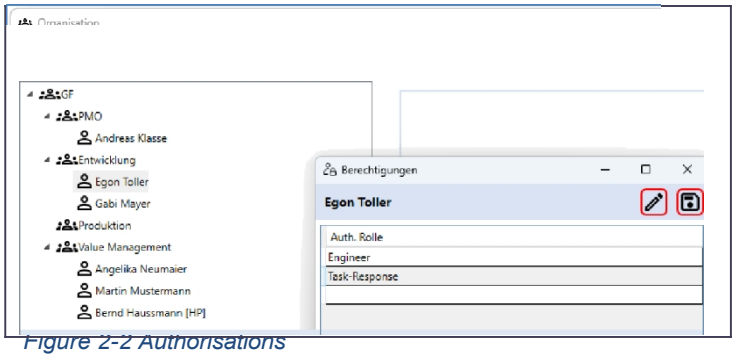


Figure 2-2 Authorisations

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

2.3.1 Master data – roles

[for administrators only]

Roles can be defined in the Master Data area, under the "Auth. Role" tab. Each role describes access to an auth. object (A0) and the corresponding activity (AA) for it.

There are four A0s ("Project", "Idea", "Task", "Organisation") and two AAs ("Edit", "Display").

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

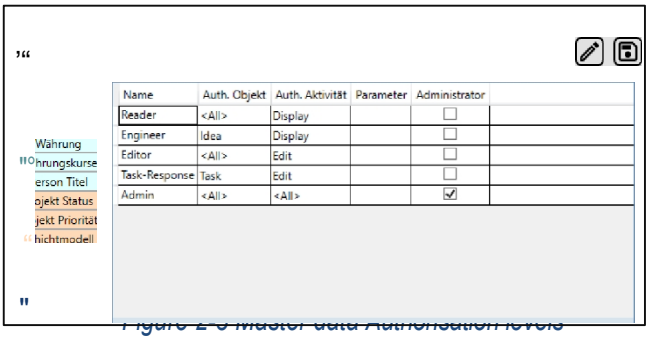


Figure 2-3 Master data Authorisation levels

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.

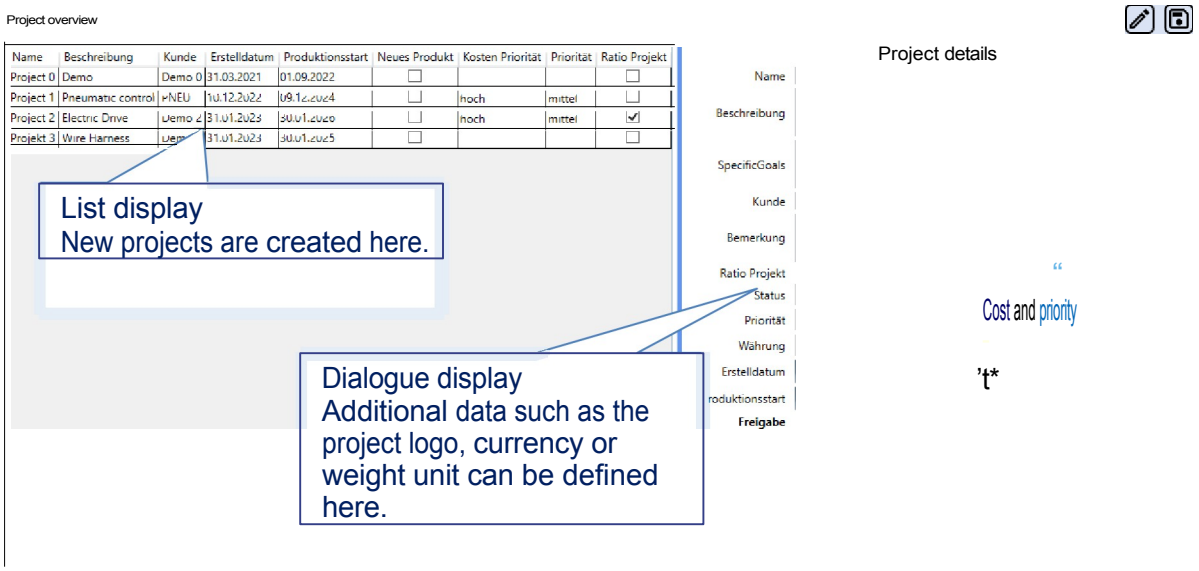
A change during a project does not result in the conversion of all amounts.



3 Project list

3.1 Project organisation

Each organisation carries out different projects with different priorities. In order to coordinate the priorities and carry out further project planning, active projects are displayed in a list and with detailed data.

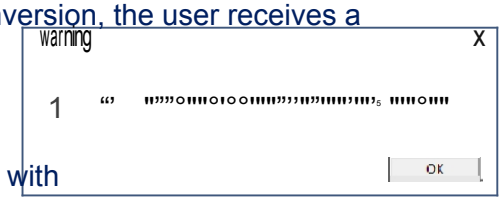


This application helps the project coordinator or steering committee assign moderators and experts to projects. Each project is described with significant key figures to make it easier for moderators and experts to get started with the project and to enable them to estimate the duration of the team event.

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

⇨ A project can be created in any foreign currency. The conversion is carried out by entering the details in the master data.

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

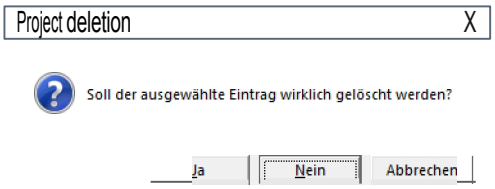


⇨ However, if the currency of the project is changed at a later date,
No conversion. Therefore, please use this setting with caution.

⇨ 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 licence, entries such as ideas, project FMEA, product FMEA, related actions, etc.

3.1.1 Import and export projects

In this dialogue, 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 be pre-filled with typical team members or meeting sequences, for example, which then only need to be adjusted to the timeline.

The currency and weight unit are also imported during import. The product tree is also imported.

4 Projects

The organisational basis of EVI:0NE is the project.

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

4.1 Industrial base 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.

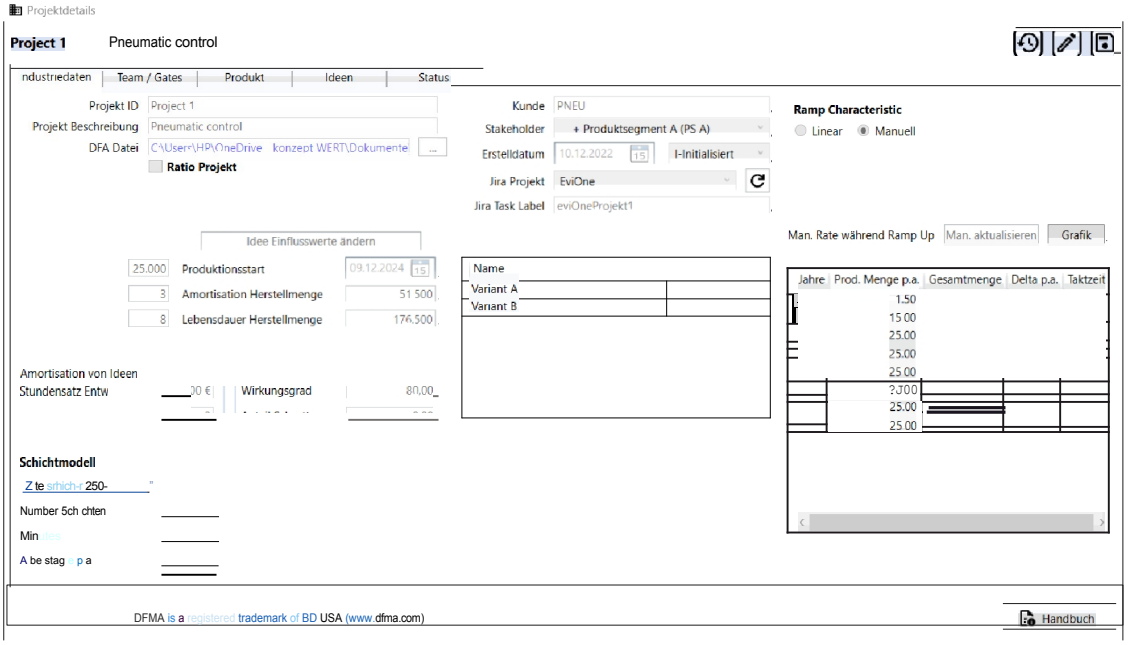


Illustration zi-IProjekfdefails - /ndusfriedalen

The following factors are important for cost-related decisions.

a) The production quantities of the product over its life cycle, but also over the amortisation period.	Production volume Herstellmenge p.a. Years Amortisation Years Service life Produktionsstart 27.07 Amortisation Herstellmenge 15.000 Service life Production quantity
b) Distribution of quantities over the service life to estimate the customer cycle time (in seconds)	Linear Manuell Man. Rate während Ramp Up Update man. Grafik Jahre | Prod. Menge p.a. | Gesamtmenge | Delta p.a. | Taktzeit 2024 5.000 5.000 5.000 1.22 2025 5.000 10.000 0 1.22 2026 5.000 15.000 0 1.22 2027 5.000 20.000 0 1.22 2028 5.000 25.000 0 1.22 5.000 30.000 0 1.22 2030 5.000

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.	d l Equivalent shift Number of shifts Shift in minutes .S•beit•-zge p.a *Figure J-2 Shift model*
d) The hourly rate for necessary unplanned adjustments for the realisation of ideas	Ideas / Engineering Hourly rate Enhv. 100.00 Amortisation of ideas 3 *Figure zi-3 Basic data development*
e) A description of variants so that the ideas/scenarios can be assigned to one or more variants if necessary. e.g. "market shares" or, in the case of cars, the proportion of "right-hand drive" vehicles. No plausibility check is carried out.	Varianten Name Anteil *Figure zi-zi Variants*
f) JIRA connection With an (optional) connection to JIRA, the corresponding JIRA project can be selected after setup and assigned a kenner.	Jira Project EviOne

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 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" click.	Einkauf Vorentwicklung Fertigung Development Systementwicklung Qualitätssicherung DFMA Moderator *Figure J-S Team Members Roles*
i) Project roles are used in other modules	

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

Daum	Bepre‹ hun9snel
	Loop 2
1010.2D22	Loop 3
2609.2022	Pre'mna DeignB'lw
28.07.2022	Vorbesprechung
25.10.2022	Loop 4
16.08.2D22	Loop 1

k) Double-clicking on an individual entry provides further documentation options for optimally moderating the projects.
   l) Participants
   m) Agenda
   n) Expectations
   o) Feedback
   p) Tasks for discussion
   q) Idea status
   r) Lessons learned

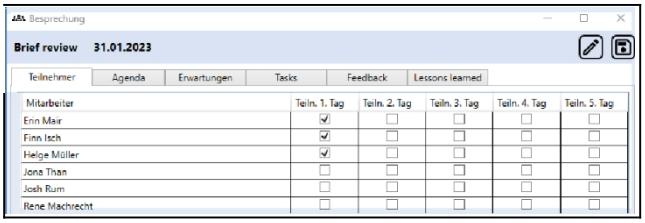


Figure zi-6 Meeting details Participants

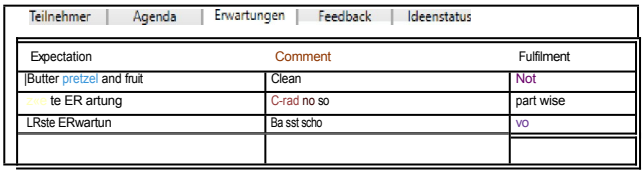


Figure J-7 Meeting details K-rw'aMungen

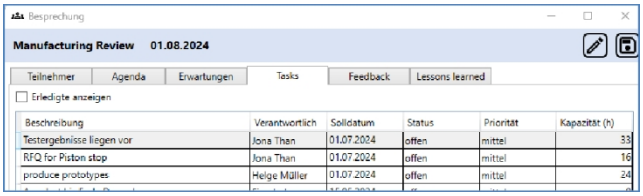


Figure 4-8 Meeting details Tasks

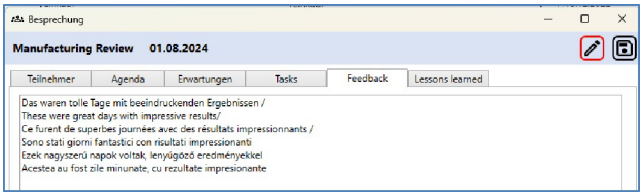


Figure J-9 Meeting details Feedback

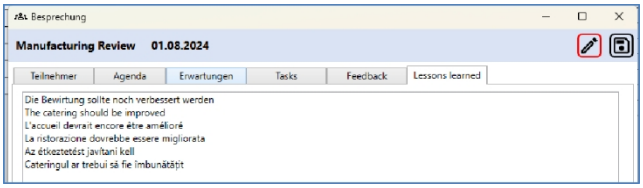


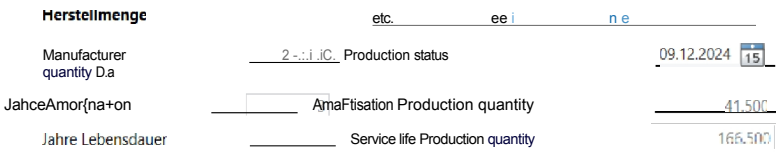
Figure ü-10 Meeting details Lessons learnt

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

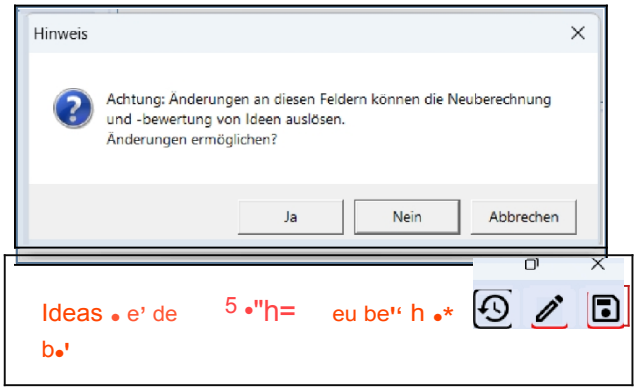
4.3 Changes in quantity

Sales scenarios may change during the course of a development project. This raises the question of which of the ideas generated are still profitable or have even become unprofitable.

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

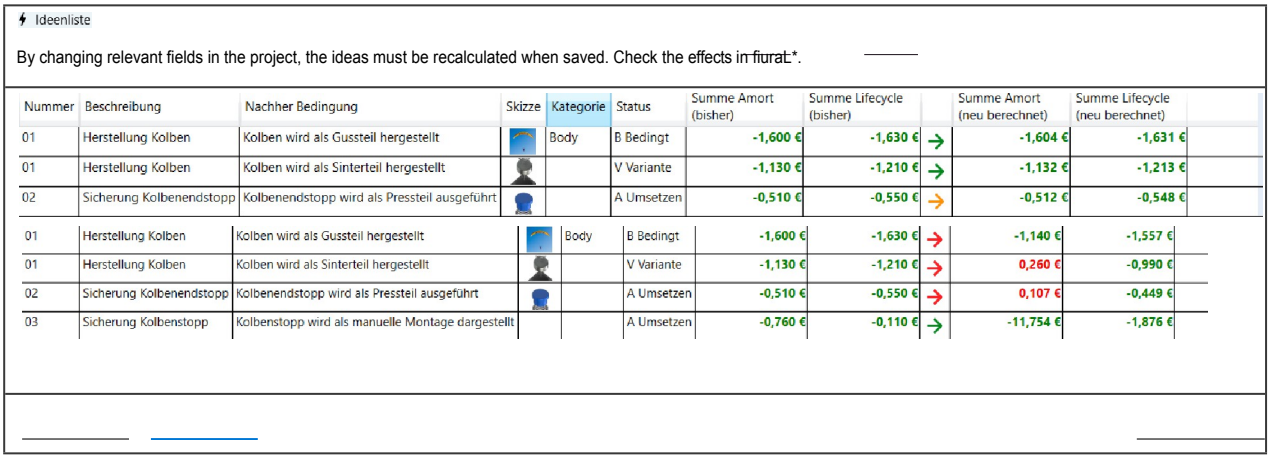


The underlying figures can only be changed after this "approval" and a corresponding note.



After the base figures have been changed, the warning notice can be seen in the top right-hand corner.

After saving, a dialogue box opens.
which displays the calculation of the ideas with the new figures.



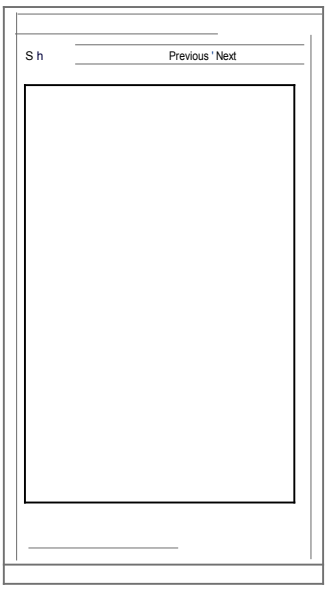
Nummer	Beschreibung	Nachher Bedingung	Skizze	Kategorie	Status	Summe Amort (bisher)	Summe Lifecycle (bisher)		Summe Amort (neu berechnet)	Summe Lifecycle (neu berechnet)
01	Herstellung Kolben	Kolben wird als Gussteil hergestellt		Body	B Bedingt	-1,600 €	-1,630 €	→	-1,604 €	-1,631 €
01	Herstellung Kolben	Kolben wird als Sinterteil hergestellt			V Variante	-1,130 €	-1,210 €	→	-1,132 €	-1,213 €
02	Sicherung Kolbenendstopp	Kolbenendstopp wird als Pressteil ausgeführt			A Umsetzen	-0,510 €	-0,550 €	→	-0,512 €	-0,548 €
01	Herstellung Kolben	Kolben wird als Gussteil hergestellt		Body	B Bedingt	-1,600 €	-1,630 €	→	-1,140 €	-1,557 €
01	Herstellung Kolben	Kolben wird als Sinterteil hergestellt			V Variante	-1,130 €	-1,210 €	→	0,260 €	-0,990 €
02	Sicherung Kolbenendstopp	Kolbenendstopp wird als Pressteil ausgeführt			A Umsetzen	-0,510 €	-0,550 €	→	0,107 €	-0,449 €
03	Sicherung Kolbenstopp	Kolbenstopp wird als manuelle Montage dargestellt			A Umsetzen	-0,760 €	-0,110 €	→	-11,754 €	-1,876 €

Both the previous and new figures are displayed for each idea. Whether and how an idea changes is shown by the indicator arrow. (Red = gets worse, yellow = remains neutral, green = improves.

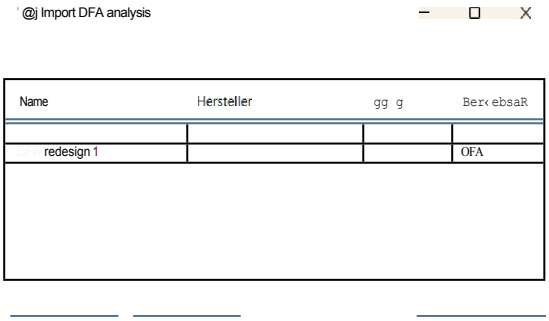
The new figures are adopted when you save.

'. Product

When working with DFMA, it is helpful to import the data for further 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.

*S Ideas

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

In EVI:0NE, ideas can be documented, developed and managed. Within a project, there is an "Ideas" tab for idea processing.

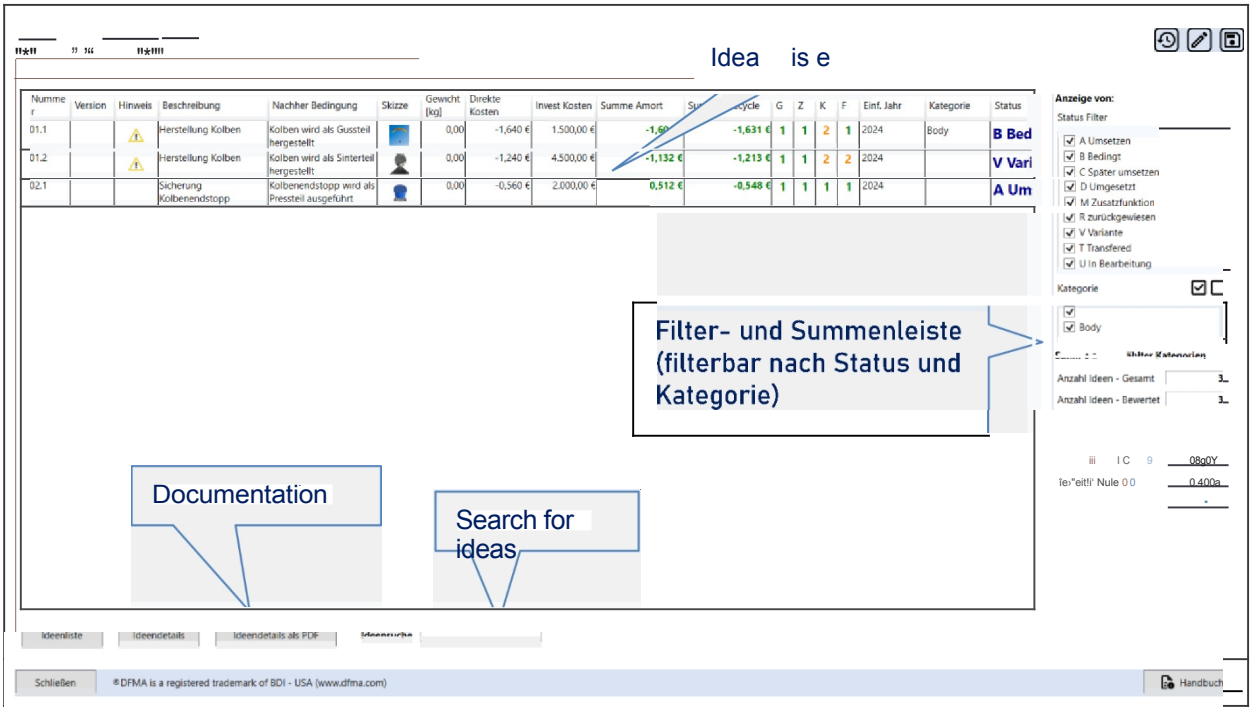


Abbildung 4-11 Ideenlistung im Projekt

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
- Previous
- Weight change
- Change in investment costs
- Status
- Description (of the idea)
- After
- Change Direct Costs
- Year of introduction

The fields 'Total amortisation' and 'Total lifecycle' are generated automatically.

The fields for risk assessment G (=weight), K (=costs), Z (=time), F (=function), C (=C02e) and R (=repairability) are available for detailed idea processing

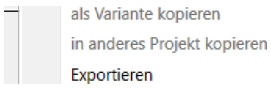
If there are several ideas for a specific product location (where ultimately only one idea can be implemented), these ideas can be assigned a version.

Double-clicking on an entry in the idea list 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 Duplicating, copying, importing/exporting ideas



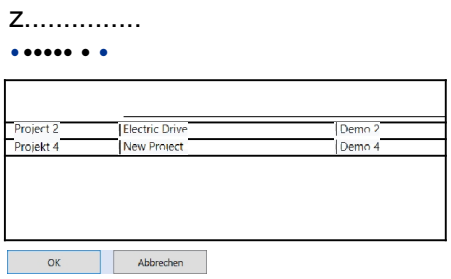
By right-clicking on an idea, you can duplicate it as a variant, copy it to another project or export it.

The import of other ideas is also initiated here.

a) Copy as variant
When completed, the copy of the idea will have "(copy)" added to its description.



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



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

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

d) Import
Clicking Import opens the Windows "Open" dialogue 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

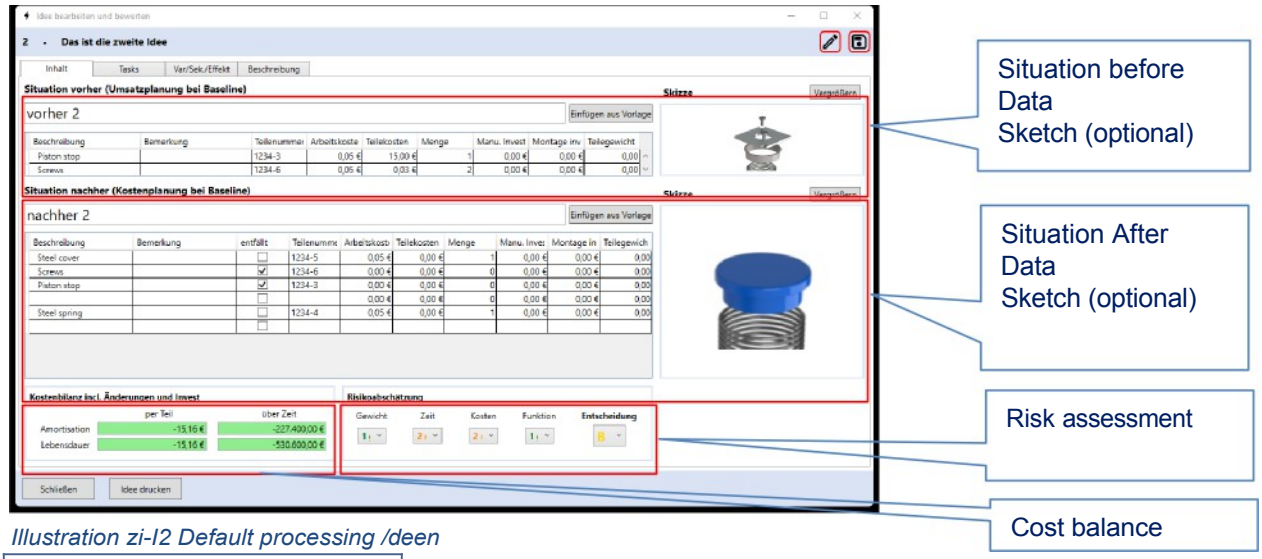
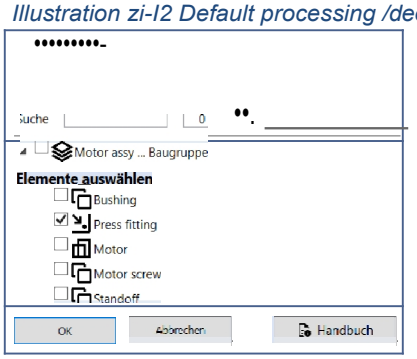


Illustration zi-I2 Default processing /deen



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 so that progress can be monitored and tasks can be managed in the event of special circumstances (illness, change, termination, etc.).

When estimating the capacity required for a task, it is important not to overload the person responsible.

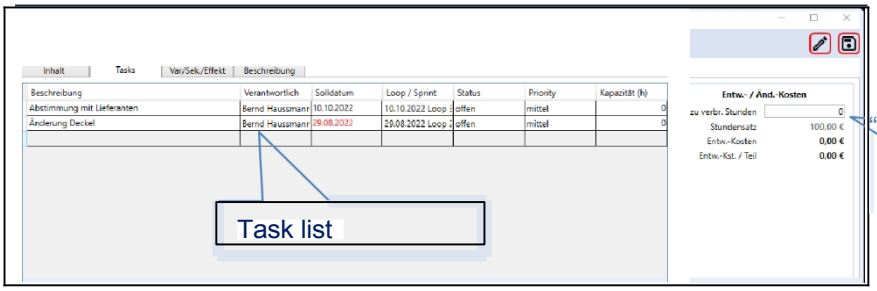


Figure ü-13 Tasks for the idea

4.5.2.3 Variants / Secondary effects

There are three possible approaches to developing ideas.

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

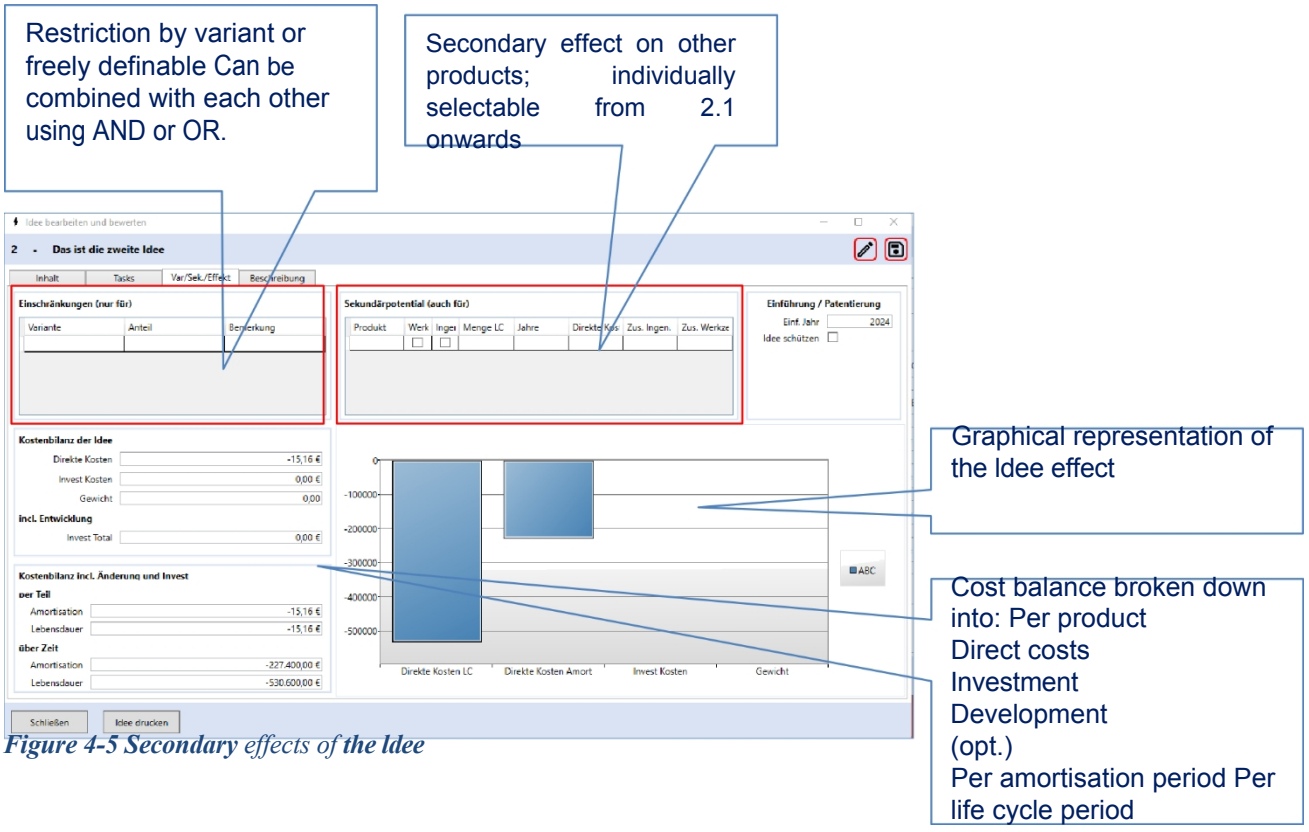


Figure 4-5 Secondary** effects of **the Idee

4.5.2.4 Description

In the "Description" tab, additional cost balances can be divided up for each idea

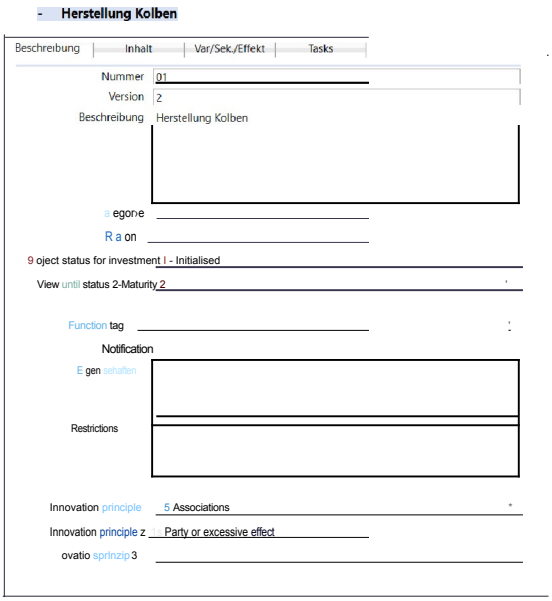


Fig. zi-IS Description and cost breakdown of a/the

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 Idee was recorded (default setting is initially I = Initialised)

Expected completion of the Idee (for EVI:ONE-Basis, this field is open)

Function holders: Ideas can be assigned to function holders here. (free allocation possible)

Function: Ideas can be assigned functions here (free assignment 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 function carriers of two products are to be compared, the components and operations belonging to this function carrier can be easily generated.

When processing ideas, the components of other projects can also be used.

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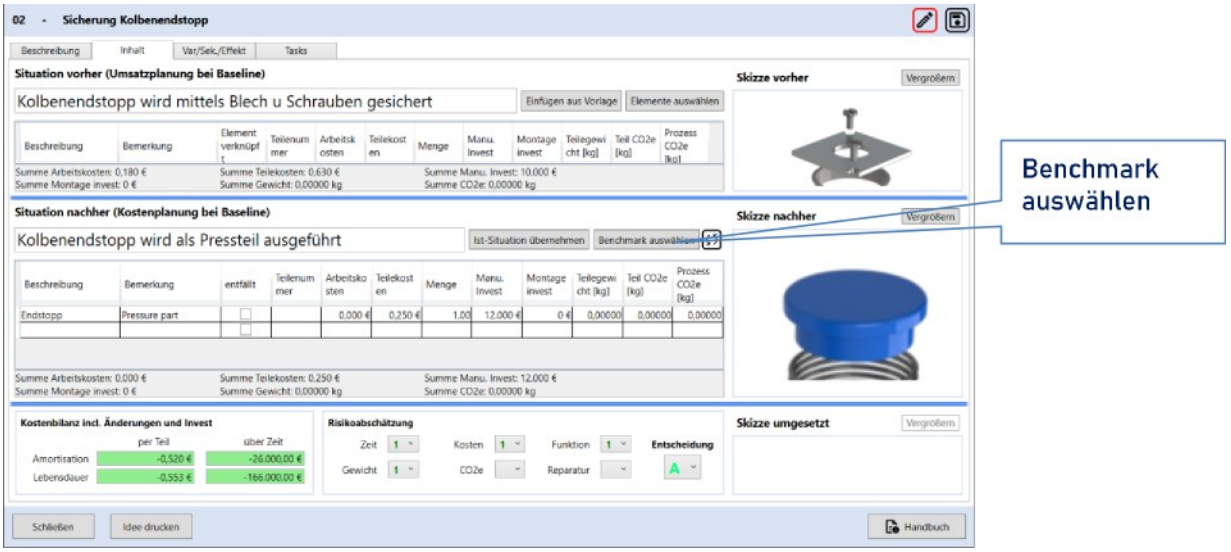
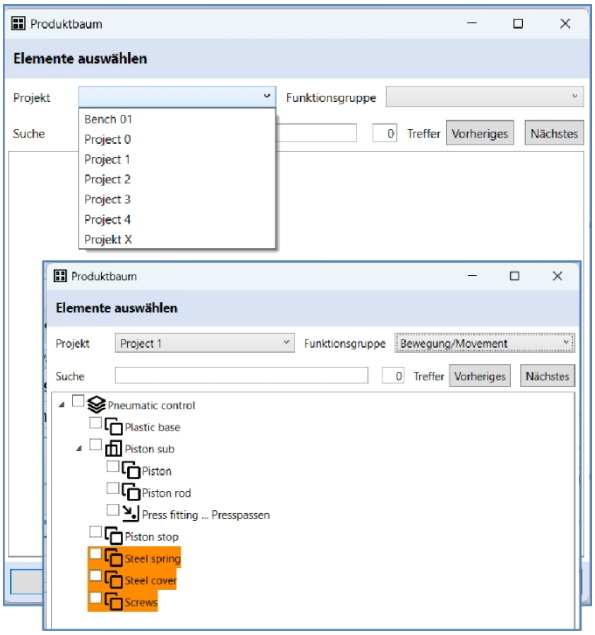


Clicking opens a dialogue box that gives the user access to all projects and product trees.



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 colour.

By selecting and clicking OK, the entries are copied to the target situation in Idee.

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.



Selection of idea groups A, B, C or ideas already implemented

Graphical representation of the idea effect summed up across all ideas.

Colour-coded according to idea status

.

Illustration zi-ló /deen-Sfafus of a project

5 List of ideas

To enable ideas to be searched for and edited without having to open the project each time , you can use the idea list.

Before editing, you first need to SEARCH.

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

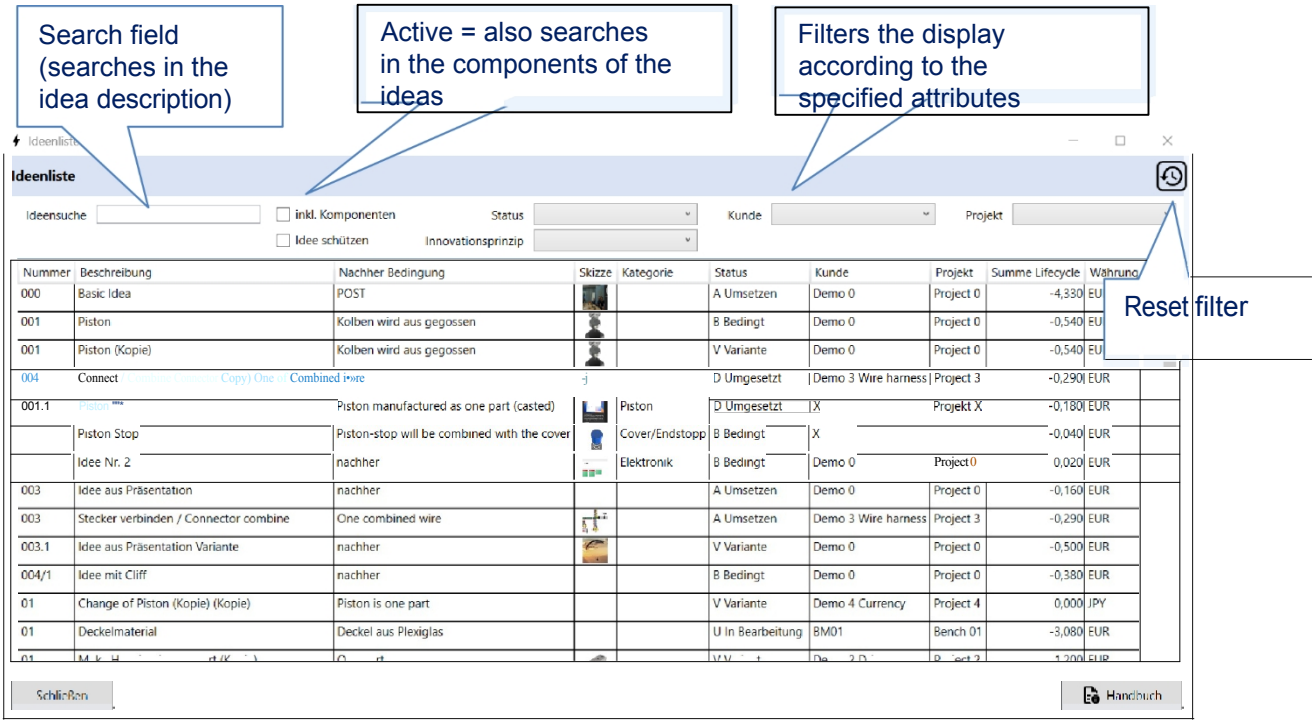


Figure S-1 Idea list

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

Over time, a library of ideas is created, which can be a source of help for new or younger colleagues, among others.

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6 Packaging

In many projects and in the early project phase, a great many ideas are generated. There are several alternative development directions for a problem or question, which may even be mutually exclusive.

The "Idea Packages" module was developed to address this issue.

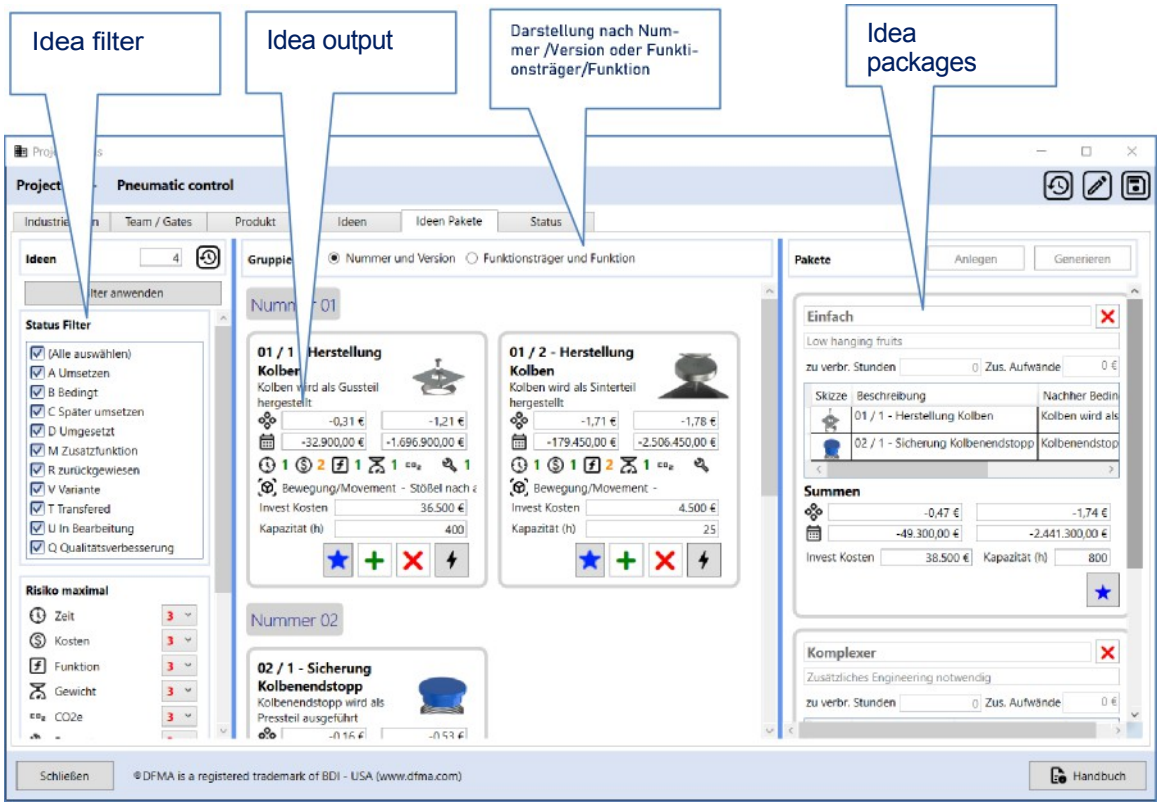


Figure 6-1 – Idea packaging

The application is very simple: a new package is created on the right-hand side in edit mode, and by clicking on (orange frame). By clicking on /+/ assigns the idea to the package. The potential values of the ideas are added up in the package.

This allows different packages to be generated and compared.

If additional effort is required for a package, this can be added within the package.

A common application would be to combine short-, medium- and long-term ideas.

A new package can be generated automatically by clicking on "Generate".

7 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, the status of the task, the target processing goal and various files can be linked as documentation.

Feedback is also provided there.

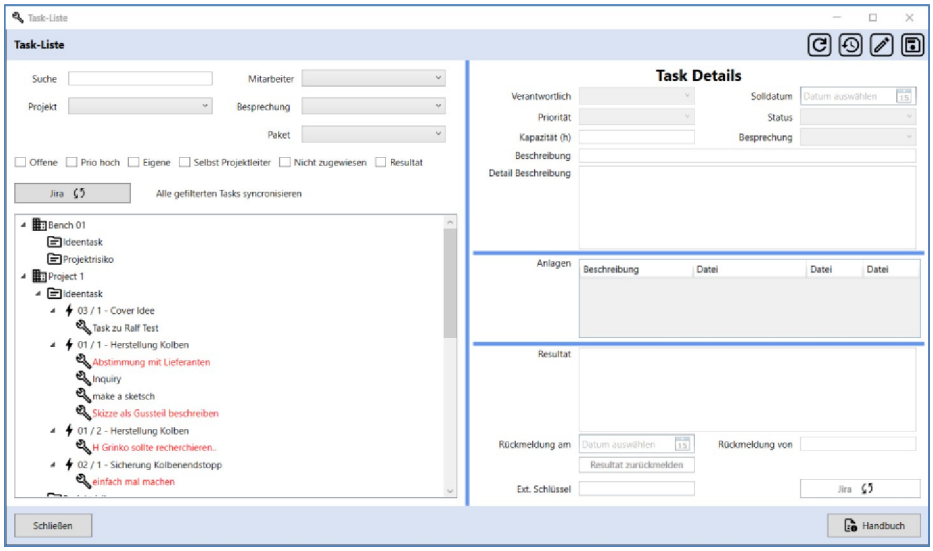


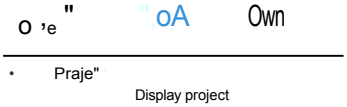
Figure 7-1 Task list

If the **Task Management** function has been licensed, all tasks selected by the filter can be synchronised in batch mode with either Microsoft Planner or Atlassian JIRA.

The settings for task management are dealt with separately.

7.1 Branching to other objects

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



7.2 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. quotations) can be added to each task.

8 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 ev'i.Inno is kept up to date through a licence cooperation with Systematic Innovation "sieis". Some of the explanations were created in collaboration with the TPIZ Consulting Group.

The application of Creative Contradiction is explained in more detail during training.

In short: by combining both improving and deteriorating characteristics, innovation principles are identified that have proven successful in this combination (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 in which it is named in the matrix. The stronger it is, the more frequently it was named in the analysed patents.

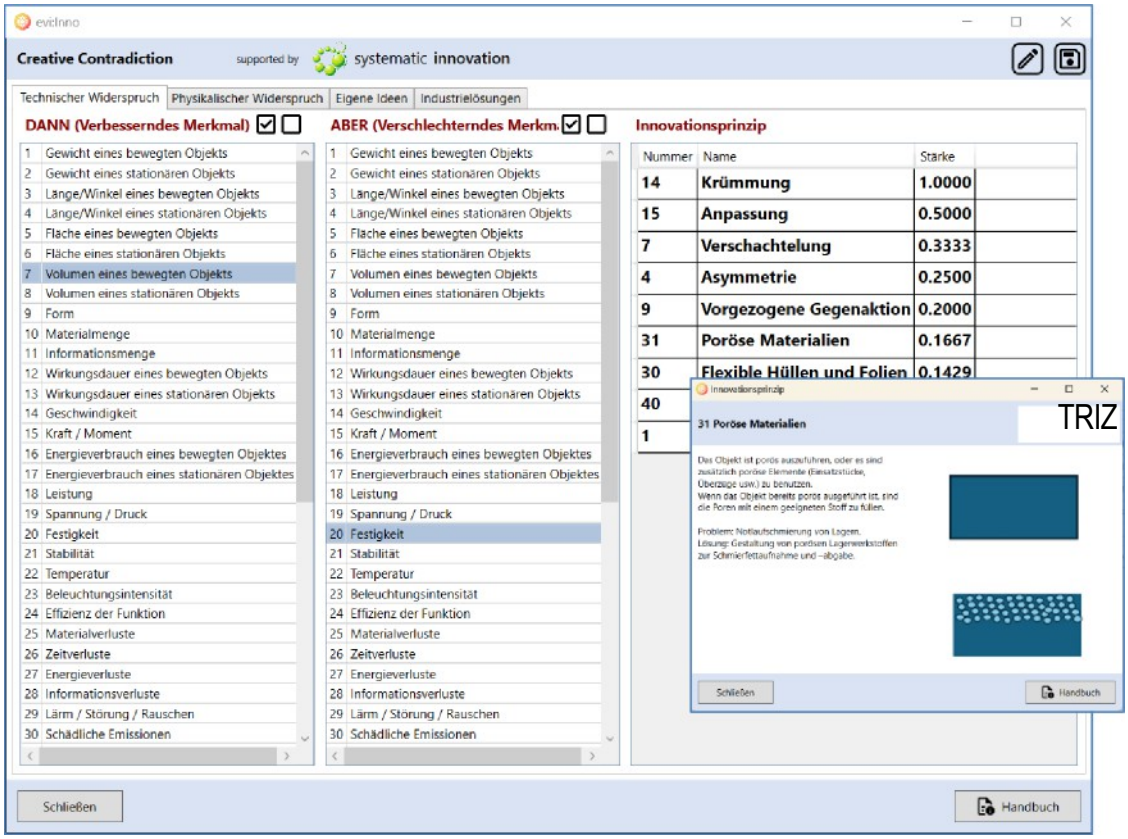
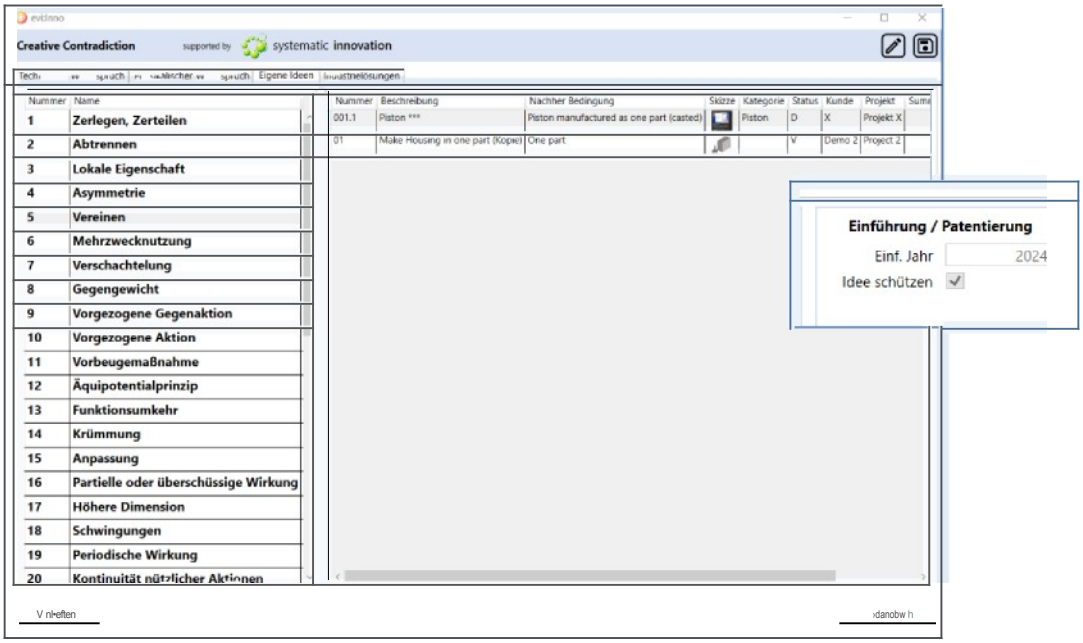


Figure 8-1 Contradiction Matrix

8.1 Knowledge management

In order to store good ideas within the organisation 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.

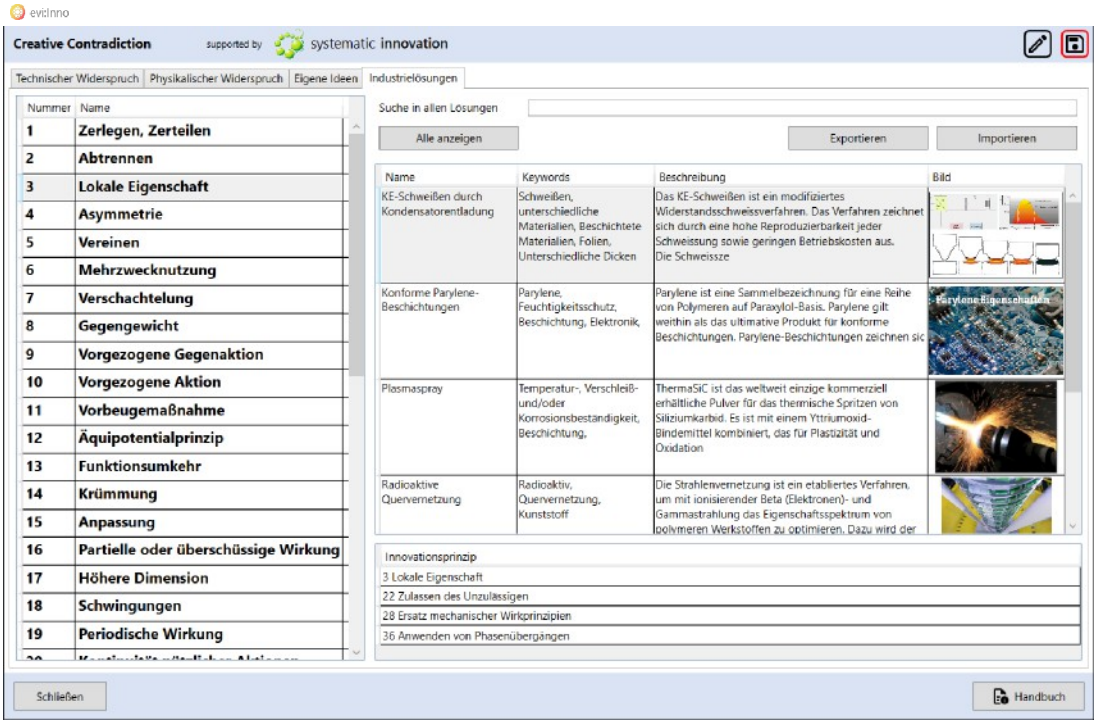


The idea can be opened by double-clicking on it.

Here, lessons learnt are actively organised as ideas and experiences and used for the further development of the organisation.

8.2 External knowledge / Virtual trade fair

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



9 Settings

Various functions can be specially configured for the experts at evi:0ne.

General

Chart display	Display of idea values either as amortisation or LC
Idea variants	The addition of the different variants can be set using the calculation logic.
Ideas decimal places	Sets the number of decimal places in the Idee.
Tasks: Standard selection	If set to "TRUE", the task is automatically assigned to the next project meeting (can be changed). If set to "FALSE", the task is assigned by the moderator themselves.
Tasks: Default target date	For tasks, today's date is set as the target date + the set number (changeable)
Meeting: Move tasks to a changed meeting.	If TRUE, all tasks linked to a meeting are moved along with the date of the meeting.
Use integrated reports	If YES, the internal reports are used; if NO, the old SQL report reports are still used.

Full screen

Here you can set which windows are automatically displayed in full screen mode when opened.

Selection	Select the respective window

Task Management

All settings for the respective PM systems are configured here. The first fields contain the necessary links and entries.
The special evi0ne configuration includes the following:

Enforce responsible person	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.
Export attachments	If "TRUE", the attachments are exported from evi:One
Export idea details	The details documented in the workshop are exported.
Export idea sketches	The sketches documented in the workshop are exported.
Import attachments	If "TRUE", attachments from JIRA are imported into evi:One.
Import comments	If "TRUE", comments are imported from JIRA.
External users	External users who are not yet created in evi0ne are imported.

10 Demo client

In order to try out the various options offered by EVI:ONE without any risk, a DEM0 client is always installed.

You can access the DEM0 client via the login screen by selecting the corresponding entry.

The demo client is marked with a flag in the master data.

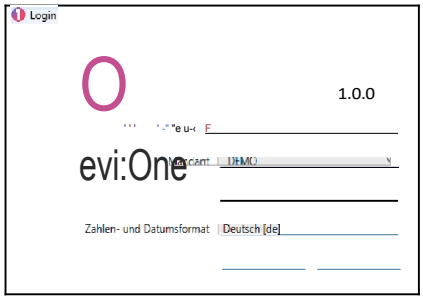


Figure 10-1 Demo client login

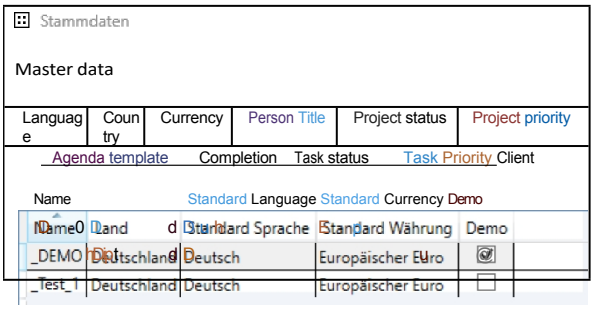


Figure 10-2 Labelling DElvt0 client

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

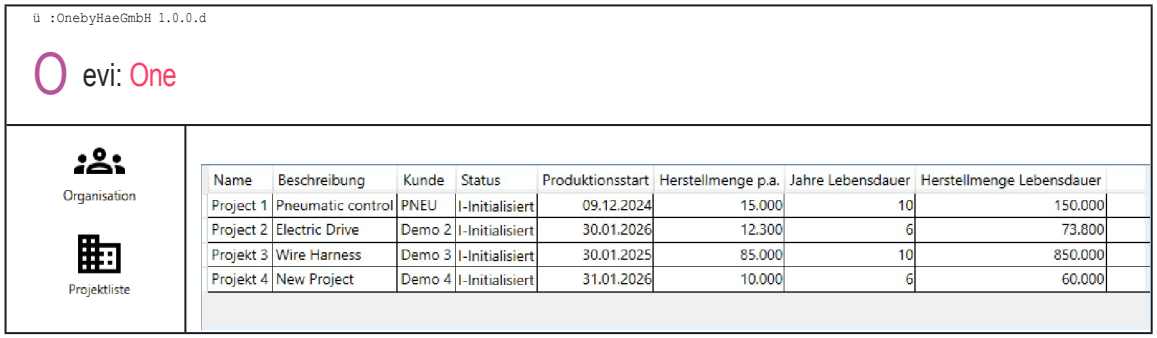


Figure 10-3 Projects in the DK-1 IO client

11 Directories

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