

PRISM Tutorial

June 8, 2020

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Overview

- **Global 8D** hosted software solution is a world-class application that allows individuals and teams to create, request, review, and report on problem solving efforts using the proven Global 8D methodology.

Benefits

- > **Improves 8D quality** by asking the right questions and delivering both information and help about the problem-solving process at each step.
- > **Improves 8D closure** by allowing you to easily track the status of your 8Ds or those you have requested.
- > **Improves 8D consistency** by providing uniform content, formatting, and terminology across all 8Ds.
- > **Reduces 8D redundancy** by providing extensive search capabilities, giving you the opportunity to expand on or learn from your existing 8Ds rather than duplicating effort.
- > **Improves communication and teamwork** by allowing users across the room or across the world to effectively collaborate on problem-solving efforts.

Features

- **Request 8Ds from your Suppliers** - Request 8D Problem Solving reports from anyone, anywhere, and review the results in a secure, globally-accessible environment.
- **Create 8Ds for internal use** - Initiate and manage your own 8Ds in response to customer concerns or for internal problem solving.



Features

- **Support for complex problems** - Organize information about complex problems. For example, you can track multiple potential root causes, multiple escape points, and multiple corrective actions in the same 8D.
- **Multiple reports** - Download and print your 8Ds in a clean, consistent 8D Detail report format, or download 8D information from multiple 8Ds directly into Excel to accommodate more customized metrics reporting.
- **Team management** - Specify who can edit the 8Ds you have initiated.
- **File sharing** - Attach supporting files to your 8Ds and make them instantly accessible to team members worldwide.
- **Integrated email** - Use integrated email functionality to notify team members when they are added to the team, when an 8D is completed, and when other significant events occur.
- **Cross References** - Add custom cross-references to your own product codes, symptom codes, organization codes, etc.
- **8D Log** - The 8D provides the team a means of communicating on status and tasks without disturbing the 8D content. It also automatically tracks special events such as 8D creation and closure, and is integrated with email capability.
- **Search for relevant 8Ds** - Search your 8D repository using multiple criteria including key dates, 8D Status, your own custom cross-references, and more.
- **Assignment tracking** - Track and update individual team member assignments and status.
- **"D-Zero" designation** - Use the Global8D.com "D-Zero" feature to identify and manage concerns that may not require full 8D efforts, then convert these to full 8Ds as necessary.

8D Problem Solving Summary



D0: Symptoms

Preparation and Emergency Response Actions: Plan for solving the problem and determine the prerequisites. Provide Emergency response Actions

D1: Team

Use a Team: Establish a team of people with product/process knowledge.

D2: Problem

Describe the Problem: Specify the problem by identifying in quantifiable terms the who, what, where, when, why, how, and how many (5W2H) for the problem.

D5: Corrections Identified

Verify Permanent Corrections (PCs) for Problem will resolve problem for the customer: Using pre-production programs, quantitatively confirm that the selected correction will resolve the problem. (Verify that the correction will actually solve the problem.)

D4: Causes

Determine and Verify Root Causes and Escape Points: Identify all applicable causes that could explain why the problem has occurred. Also identify why the problem was not noticed at the time it occurred. All causes shall be verified or proved. One can use five whys or Ishikawa diagrams to map causes against the effect or problem identified.

D3: Containment –

Develop Interim Containment Plan: Define and implement containment actions to isolate the problem from any customer.

D6: Corrections Implemented

Define and Implement Corrective Actions: Define and Implement the best corrective actions.

D7: Preventive Actions

Prevent Recurrence / System Problems: Modify the management systems, operation systems, practices, and procedures to prevent recurrence of this and similar problems.

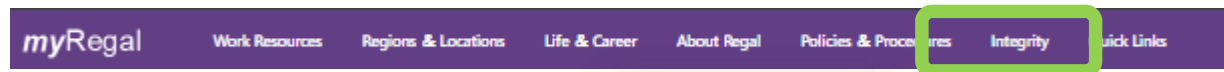
D8: Recognition

Congratulate the Main Contributors to your Team: Recognize the collective efforts of the team. The team needs to be formally thanked by the organization.

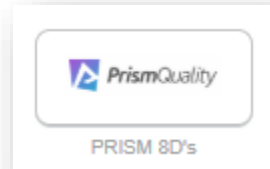


Most common methods to access

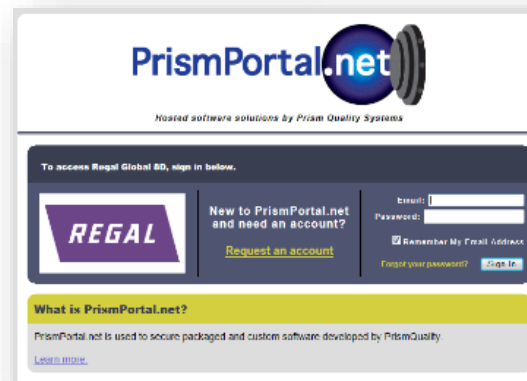
1. Email sent inviting you in the 8D
2. Customers & Suppliers go to <https://www.global8d.com/regalbeloit>.
3. Regal employees go to myRegal *Quick Links*



Look for the Icon



Login after accessing

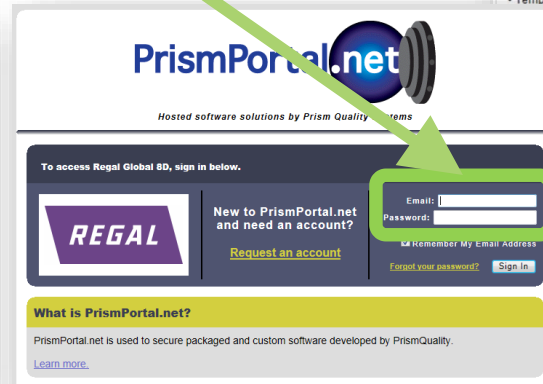
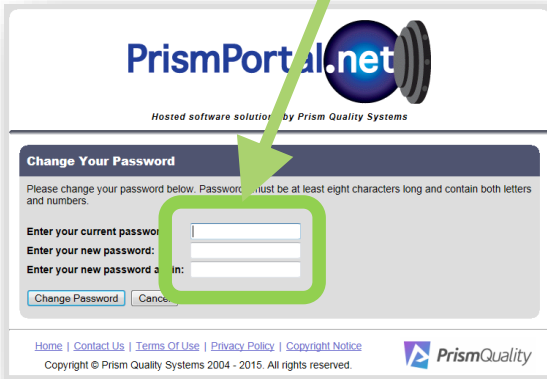
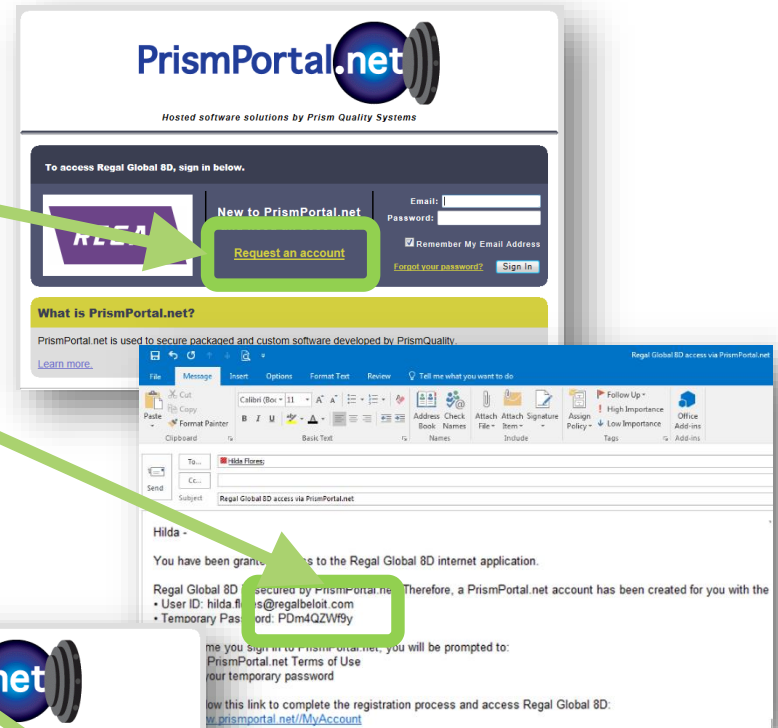


Creating an Account



- PRISM

1. Select "Request an Account"
2. Check Email from support@global8d.com, for temporary password (maybe in SPAM Box)
3. Login to PRISM portal
4. Change password



PRISM Help Desk: (989) 835-5252
or support@global8d.com



- General Information

- Trial and error is acceptable. You may create a dummy 8D, but later let us know so we can delete it from the system. If for any reason an 8D needs to be re-opened, it can be done.

- Blue text are helpful hints or key information

Limited to the 5 8Ds that have been awaiting

- Exclamation triangle provides warning detail

 *Changing the 8D Status to "Cancelled"*

- Question mark icon provides additional detail
 - Frequent Questions Asked



- Show me icons are demo like instructions





Main Menu Screen

- Create new 8Ds or access your current ones
- Manage settings and communicate

Hello, Hilda Flores. [Sign Out](#)
Help Desk: (989) 835-5252 or support@global8d.com

REGAL
GLOBAL8D

Main Menu All My 8Ds Search for 8Ds

Tools

- Create a New 8D
- 8D Number: [View](#)
- My Settings
- My PrismPortal.net Account
- Regal Resource Materials
- Hidden Broadcast Messages (0)

Broadcast Messages

The Global 8D system has been upgraded. [Hide this Message](#)

The Global 8D application was updated on October 19 and includes the following changes and enhancements:

- * The Supplier 8D Type has been split into Internal and External suppliers throughout.
- * Supplier 8Ds for Accounting and Delivery now only require the Supplier Name field and not all the other Supplier-related fields.
- * Repeated Issue fields have been added to the 8D's General Information.
- * New Default Team Member functionality is now available for the combination of 8D Type and Issue Type.
- * The Added-to-Team email has been updated to include "Corrective Action Instructions".
- * Various "Days Open" columns have been added to the 8D List and SDE reports.

(Message issued on 19-Oct-2018, expires on 19-Nov-2018.)

My Recently Updated 8Ds

Limited to the 10 most recently updated 8Ds where you are on the team. View [All My 8Ds](#) to see your full list and additional tools.

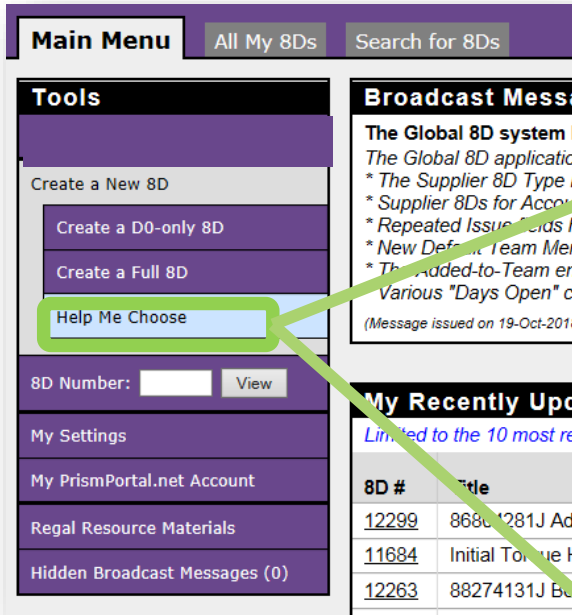
8D #	Title	8D Status	Complete through	Last Update
12299	86804281J Adhesive tape forms wrinkles or peels off W/ the backing	Open	D2 *	23-Oct-2018
11684	Initial Torque High	Open	D8 *	23-Oct-2018
12263	88274131J Bearing Cartridge is Missing from the Grommet	Open	D2 *	23-Oct-2018
12298	Brg. Depth O/S red tag# 523266	On Hold (D0-only 8D)	n/a	23-Oct-2018
11712	N E W Industries PN 280-0009-001	Open (D0-only 8D)	n/a	23-Oct-2018
12267	D... 855888-87-D... 1-0185...	Open	n/a	23-Oct-2018

Navigating in PRISM



Main Menu Screen

Two 8D options, D0-only 8D and Full 8D. See also “Help Me” Choose



When beginning an 8D, you have two options:

Option 1: Create a D0-only 8D (D-Zero-only 8D)

This option allows documentation of:

- The initial issue that prompted the request for an 8D.
- Action taken in response to this issue.
- The cause of the issue, if known.

This option allows generation of a simple report, which can be used to provide rapid feedback on the issue.

A D0-only 8D can be expanded to a Full 8D at any time if necessary, or it can be marked complete as a D0-only 8D if appropriate.

Additional Regal Guidelines

Do not use a D0-only 8D if:

- Containment Action is required.
- Customer will ask for Corrective Action.
- Supplier is part of the Under Performer or has several incidents reported.

Every D0-only 8D is required to include an assignment to review the effectiveness of the Corrective Action taken.

Leaders will be responsible for:

- Identifying the person to review the action (who has it been assigned to).
- Identifying the method to determine if the Corrective Action is effective.
- Reviewing the evidence and determining if it indicates the Corrective Action was effective before closure.

Create a D0-only 8D

Option 2: Create a Full 8D

Use this option if you already know that a Full 8D is appropriate. This option does not provide the ability to generate a D0-only 8D report, although D0 information can still be documented in the context of the Full 8D.

Create a Full 8D

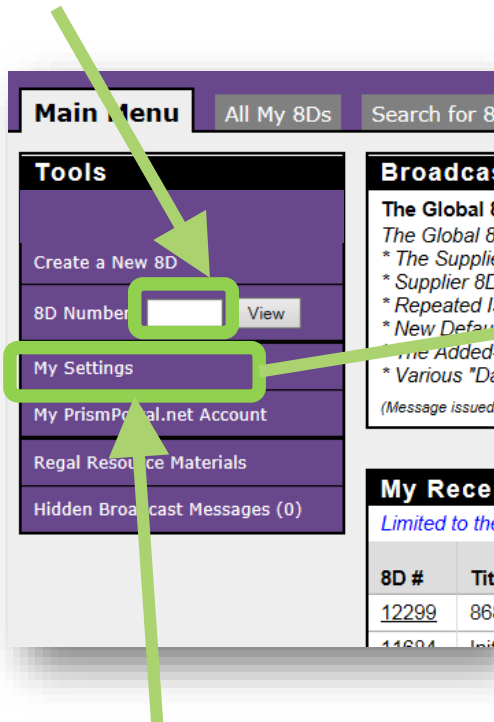
Cancel

Navigating in PRISM

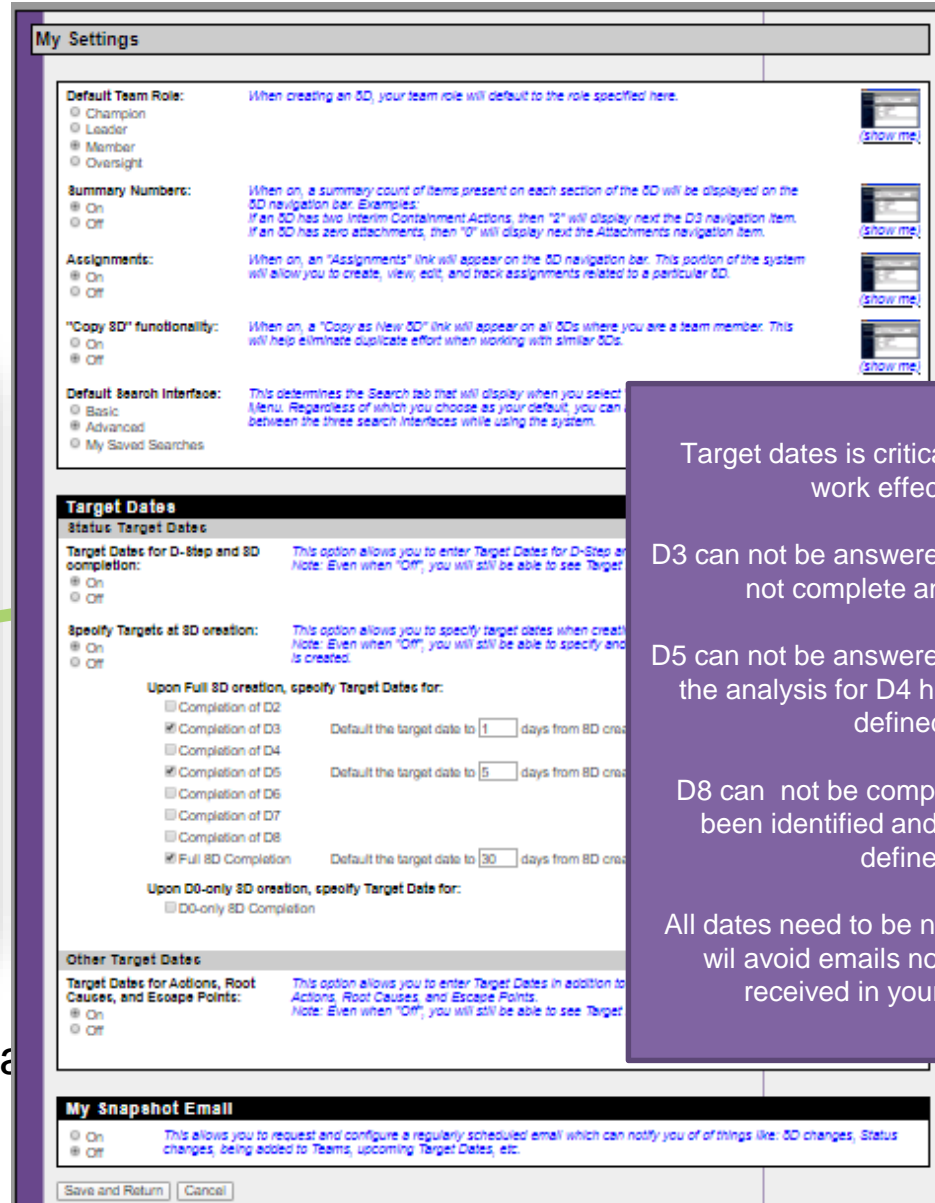


Main Menu Screen

- Find 8D Document by 8D Number



- Customizable viewing & defaulting options



Target dates is critical for the team to work effectively.

D3 can not be answered if D0, D1 & D2 is not complete and accurate

D5 can not be answered if the team doing the analysis for D4 has not be able to defined it

D8 can not be complete if D6 has not been identified and D7 has not be defined.

All dates need to be negotiated and this will avoid emails not needed to be received in your email box.

Navigating in PRISM



- Main Menu Screen
 - Manage your overall PRISM account under Regal Global 8D link.

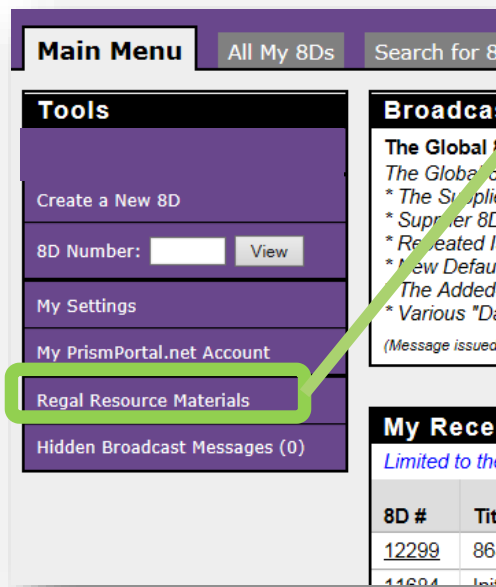
The image shows two screenshots from the PRISM system. The left screenshot is the 'Main Menu' screen, featuring a purple header with 'Main Menu', 'All My 8Ds', and a search bar. Below the header is a 'Tools' section with options like 'Create a New 8D' and '8D Number: [input] View'. A green box highlights 'My PrismPortal.net Account' in the 'My Settings' section. The right screenshot is the 'PrismPortal.net' account page, featuring the logo and the text 'Hosted software solutions by Prism Quality Systems'. It displays a personalized greeting: 'Hello, Chris Follis. If you are not Chris Follis, please click [here](#).' Below this is a list of account links: 'Regal Global 8D', 'UTC Building & Industrial Systems Global 8D', 'Sign Out', 'Change Contact Information', and 'Change Password'. A green box highlights the first two links. To the right is a 'What is PrismPortal.net?' section with a description and a 'Learn more' link. The footer contains navigation links: 'Home | Contact Us | Terms Of Use | Privacy Policy | Copyright Notice' and the Prism Quality logo.

May see related Regal Supplier & Customer portals if they use PRISM also.



Main Menu Screen

- Various support templates and reference documents available.
- This PowerPoint tutorial is also located here.



Resource Materials

The following information and referenced documents are not part of the Global 8D software. This information has been provided by Regal and is included here for availability to Regal's Global 8D users.

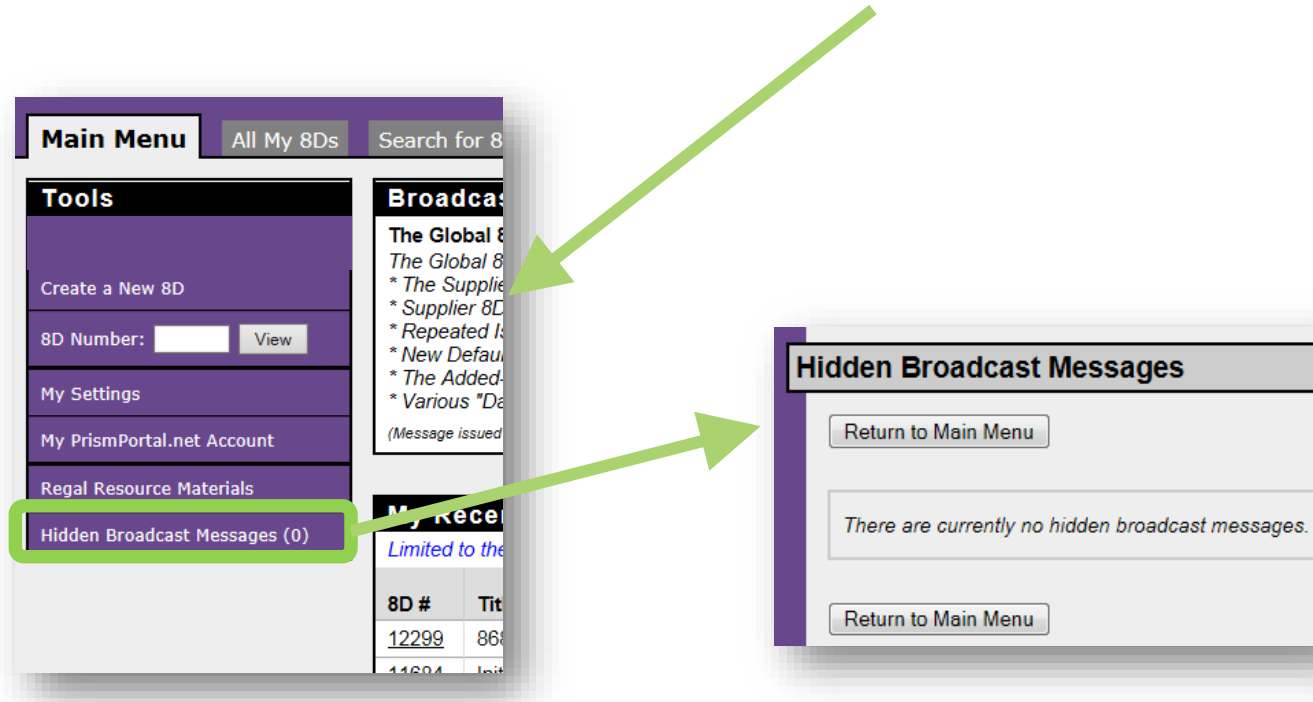
Resource	Description	
PRISM Tutorial (November 2017)	Detailed material to take individuals step by step on how to create, request, review, and report on problem solving efforts using the proven Global 8D methodology.	Download
3 Legged 5 Why.xls	3 Legged 5 Why.xls	Download
5 why form.xls	5 why form.xls	Download
Cause and Effect Matrix.xls	Cause and Effect Matrix.xls	Download
Data Collection Plan.xls	Data Collection Plan.xls	Download
DFMEA_PFMEA.xls	DFMEA_PFMEA.xls	Download
FMEA.xls	FMEA.xls	Download
Improve Worksheet		
Is Is Not T 070412.xls		
PPMs and Guidelines		

If you identify a form that could be used standard inside our business, please share it with PRISM administrator inside Regal, so it is evaluated and published in here



Main Menu Screen

- Receive Broadcasts from PRISM and Regal administrators about changes.



Temporarily displays at top as shown, but check link for any hidden ones.



All My 8Ds Screen (Where I'm on the Team)

Filter 8D status and time periods

HELLO, CHRIS FOLLIS. [SIGN OUT](#)
HELP DESK: (989) 835-5252 OR support@global8d.com

REGAL GLOBAL8D

Main Menu **All My 8Ds** Search for 8Ds

Where I'm on the Team Pending My Review

With a status of: Open On Hold Cancelled or Completed in the last 30 days Refresh

Summary	Open	On Hold	Cancelled	Completed	Total
Full 8D	1	0	0	0	1
D0-only 8D	0	0	0	0	0
Total	1	0	0	0	1

Reports
Only selected results will be included in the report.

8D Detail Generate

Results	8D #	Title	Date Opened	Last Update	8D Status	Complete through	Leaders	Champions
<input checked="" type="checkbox"/>	4518	Carrier RCD Model A Box Label Barcode Wrong	08-May-2015	11-May-2015	Open		Chris Follis	

Global 8D is secured by PrismPortal.net. Application Version: 5.0.1 - Released: May 04, 2015 Copyright © Prism Quality Systems 2004-2015. All rights reserved.

Customize content and layout – also allows one to open 8Ds from here.



All My 8Ds Screen (Pending My Review)

- Filter review content between D0 and D8 steps
- Filter specific reviewers

The screenshot displays the PRISM application interface. At the top, a purple header contains the user's name 'Hello, Chris Follis.' and a 'Sign Out' button. Below this, a navigation bar includes 'Main Menu', 'All My 8Ds', and 'Search for 8Ds'. A secondary navigation bar shows 'Where I'm on the Team' and 'Pending My Review'. The main content area features a 'Display Settings' section with a note: 'The "Show 8Ds" setting below also affects the review information on the Main Menu.' Below this, a filter is set to 'Show 8Ds where there is something to review between D2 and Overall 8D'. A 'Refresh' button is located below the filter. The bottom section is titled 'Chris Follis Director Review' and contains the message: 'There are currently no 8Ds in this group that require review.' The footer includes 'Global 8D is secured by PrismPortal.net.', 'Application Version: 5.0.1 - Released: May 04, 2015', and 'Copyright © Prism Quality Systems 2004–2015. All rights reserved.'

Searching in PRISM



Basic Search Screen

- Keyword search all 8D fields.

Hello, Hilda Flores. [Sign Out](#)
Help Desk: (989) 835-5252 or support@global8d.com

REGAL
GLOBAL8D

Main Menu All My 8Ds **Search for 8Ds**

Basic Search Advanced Search My Saved Searches

Execute

For targeted searching using specific 8D fields, use Advanced Search.

Search for 8Ds containing **all of the words**

Execute

all of the words
any of the words
the exact phrase

All information in this system is confidential to Regal and may not be shared or distributed without the permission of Regal.

Global 8D is secured by PrismPortal.net. Application Version: 12.0 - Released: May 1, 2020 Copyright © Prism Quality Systems 2004–2020. All rights reserved.

Hints on using the Basic 8D Search:

1. Enter only those words vital to your criteria as opposed to using phrases or sentences.
2. Unless you choose to search on the exact phrase, the order of the search terms will not affect your search results.
3. The search is not case-sensitive.

Searching in PRISM



Advanced Search Screen

- Multiple fields and check boxes available.

- Status
- General
- Customer
- NPDP
- Supplier
- Free Text
- Person
- Assignment

Hello, Hilda Flores. [Sign Out](#)
Help Desk: (989) 835-5252 or support@global8d.com

Main Menu All My 8Ds **Search for 8Ds**

Basic Search **Advanced Search** My Saved Searches

Execute Clear All Criteria Save This Search...

Status Criteria

Full 8Ds / D0-only 8Ds: Full 8Ds D0-only 8Ds Both

Originally Opened:

Current 8D Status:

8D Status: Open On Hold Cancelled Completed

8D Status set:

8D Completion Review: Pending Review Not Pending Review Both

Current D-Step Status:

D-Step Status: is Incomplete Complete

D-Step Completion Review: is Pending Review

Target Dates:

Next Target Date is:

Advanced Search

Basic Search Clear All Criteria

Status Criteria

Full 8Ds / D0-only 8Ds: Full 8Ds D0-only 8Ds Both

Originally Opened:

Current 8D Status:

8D Status: Open On Hold Cancelled Completed

8D Status set:

8D Completion Review: Pending Review Not Pending Review Both

Current D-Step Status:

D-Step Status: is Incomplete Complete

D-Step Completion Review: is Pending Review

Target Dates:

Next Target Date is:

General 8D Information Criteria

8D Number between: and

8D Updated Lines:

8D NOT Updated Lines:

Originally Opened between: and

8D Type:

Lead Root Category:

Lead Root:

Item Type:

Item Subtype:

Characteristics Category:

Characteristics Subcategory:

Characteristics Reference:

Category:

Customer 8D Information Criteria

Customer:

Major Customer Request: Yes No Any

Regal Model Number:

Item Customer ID:

NPDP 8D Information Criteria

NPDP Reference:

Project:

OPM Number / PDM ID:

Task Category:

Task:

Product Name / Family:

Full Track ID:

Regal Model Number:

Date Code / Model Number:

Supplier 8D Information Criteria

Supplier:

Company Group:

Company Family:

Request to Customer? Yes No Any

Component Part Number:

Total Cost between: and

Material Returned to Supplier? Yes No Any

Free Text Criteria

Search for:

Using 8D section: All of the words any

Person Criteria

Person Address:

Person Name:

Lead Name:

Assignment Criteria

Assignment Path:

Assignment Question:

Assignment Due between: and

Basic Search Clear All Criteria

- If you continually run a report, you can save it, and just go back to it next time you will run it.



Creating a New 8D

Creating a New 8D



Select 8D Form: D0-Only or Full 8D

- Select one of the 2 options
- Recommend Full 8D since D0-only 8Ds are not a short form 8D and only capture the initial complaint and response.

When beginning an 8D, you have two options:

Option 1: Create a D0-only 8D (D-Zero-only 8D)

This option allows documentation of:

- The initial issue that prompted the request for an 8D.
- Action taken in response to this issue.
- The cause of the issue, if known.

This option allows generation of a simple report, which can be used to provide rapid feedback on the issue.

A D0-only 8D can be expanded to a Full 8D at any time if necessary, or it can be marked complete as a D0-only 8D if appropriate.

Additional Regal Guidelines

Do not use a D0-only 8D if:

- Containment Action is required.
- Customer will ask for Corrective Action.
- Supplier is part of the Under Performer or has several incidents reported.

Every D0-only 8D is required to include an assignment to review the effectiveness of the Corrective Action taken.

Leaders will be responsible for:

- Identifying the person to review the action (who has it been assigned to).
- Identifying the method to determine if the Corrective Action is effective.
- Reviewing the evidence and determining if it indicates the Corrective Action was effective before closure.

Create a D0-only 8D

Option 2: Create a Full 8D

Use this option if you already know that a Full 8D is appropriate. This option does not provide the ability to generate a D0-only 8D report, although D0 information can still be documented in the context of the Full 8D.

Create a Full 8D

Cancel

Main Menu All My 8Ds Search for 8Ds

Tools

Create a New 8D

- Create a D0-only 8D
- Create a Full 8D
- Help Me Choose

8D Number: View

My 8Ds: Pen
There are currently

My 8Ds: Whe

8D #	Title
4518	Carrier R



When not to use D0-only

Do not use D0-Only if

- Containment Action is required.
- Customer will ask for Corrective Action
- Supplier is part of the Under Performer or several incidents reported.

D0 - Only	Team Initiating the 8D	Team Responsible to provide solution	FULL 8D	Team Initiating the 8D	Team Responsible to provide solution
General Information	X		General Information	X	
D0 Information	X		D0 - Symptom & Response	X	
Team	X	X	D1 - Team	X	X
			D2 - Problem	X	
			D3 - Containment	X	X
			D4 - Cause & Escape		X
			D5 - Define Correction		X
			D6 - Implement Correction		X
			D7 - Prevent Recurrence		X
			D8 - Recognition	X	X
Attachments	X	X	Attachments	X	X
Assignments	X	X	Assignments	X	X
Emails	X	X	Emails	X	X
Status	X		Status	X	
Review	X		Review	X	

D0-Only, If expanded into a Full 8D the following sections are transferred over.

- Issue Description to D0 Symptom Description
- Action Description to D0 Emergency Response Action Description
- Cause Description to D4 Root Cause Description

See also [Expand to Full 8D](#)



General & Detailed Information Any 8D



General Information

Since the moment that the 8D is created, you have to know the 8D Type you will be documenting

- **Customer**
 - These 8Ds are initiated by our Regal Sales Group or by the affected plant after a Customer contacted us and is asking for a formal report.
 - This is preferably to be a Full 8D form.
- **New Product Development**
 - These 8Ds are initiated by our Regal Engineering team.
- **Supplier – External**
 - This 8D is created by the plant who receives a component built/manufactured/assembled in an external Supplier Site (doesn't belong to Regal)
 - This can be any 8D form (Full 8D or D0 Only)
- **Supplier – Internal (Regal to Regal)**
 - These 8Ds are created by the plant who receives a component built/manufacture/assembled in another Regal site.
 - This can be any 8D form (Full 8D or D0 Only)
- **Other**
 - This 8D is created by the Plant and is answered by the same plant teams.



General Information (8D Title)

- Titles required for all 8Ds preferably using format and examples below:
 - Customer/Supplier Site Regal Model/Part Component/Part Name
Feature/Characteristic Defect (Other)

Customer examples

Pentair Delavan Model A Shaft Length Oversized

Carrier RCD Box Label Barcode Wrong (SCAR 1234)

JCI Wichita Model B Bearing Failure (Field Return)

Trane Pueblo Various Models Winding Shorted

Supplier - External

Thorgren Part 123 Canopy Damaged

Eurotranciatutura USA LLC 87356001M Lamination Overall Diameter Oversized.

The screenshot shows a web form titled "General Information" for an 8D report. The form includes the following fields:

- 8D Title: (REQUIRED)**: A text input field with a green background.
- Opened: (REQUIRED)**: A dropdown menu showing "Default" and a calendar icon, followed by the text "by Milo van der Leij".
- 8D Type: (REQUIRED)**: A dropdown menu.
- Lead Plant: (REQUIRED)**: A dropdown menu.
- Issue Type: (REQUIRED)**: A dropdown menu.
- Issue Detail: (REQUIRED)**: A text input field with the placeholder text "Type or select an option from the list".

- Date is defaulted, but it can be updated.



General Information (8D Type)

- Select 8D type; Customer, New Product Development, Supplier-External, Supplier-Internal (Regal to Regal) or Other.

General Information

8D Title: (REQUIRED)

Opened: (REQUIRED) 22-Oct-2018 by Hilda Flores

8D Type: (REQUIRED)
 Customer
 New Product Development
 Supplier - External
 Supplier - Internal (Regal to Regal)
 Other

Issue Type: (REQUIRED)

Issue Detail: (REQUIRED)
Item/Subject:

Characteristic/Activity:

Nonconformance:

Repeated Issue? (REQUIRED) Yes No Unknown

Viewable by: Team plus all Users with Full Access
 Team Only

- Expanding information required depending on the selection made of: Customer, NPD and Supplier (next slides)



General Information (Lead Plant)

- Customer, Other & Supplier-External
 - Which is plant requesting Supplier 8D or plant responsible for Customer 8D.

Lead Plant: (REQUIRED)

- NPD
 - Does not require “Lead Plant”
- Supplier – Internal (Regal to Regal)
 - Select Lead Plant, which is received the wrong material (as noted below the box)

Lead Plant: (REQUIRED)
*Select the plant that received defective material and is requesting the 8D.
(The plant responsible for the problem will be identified in the Supplier section below).*

General Information issue type drop list depends on the 8D Type selected previously.

8D Type: (REQUIRED)

Lead Plant: (REQUIRED)

Issue Type: (REQUIRED)

Issue Detail: (REQUIRED)

Item/Subject:

Characteristic/Activity:

Nonconformance:

8D Type: (REQUIRED)

Lead Plant: (REQUIRED)

Issue Type: (REQUIRED)

Issue Detail: (REQUIRED)

Item/Subject:

Characteristic/Activity:

Nonconformance:

8D Type: (REQUIRED)

Issue Type: (REQUIRED)

Issue Detail: (REQUIRED)



General Information (issue detail & item / subject)

- Issue Detail is composed of three cascading fields with search as you type drop downs.

- Examples

- Motor Performance (Noise) Excessive
- Motor Performance (Amps) High
- Generator Regulator Output High
- Order Quantity Inadequate
- Shipment Location Wrong
- Label (Product) Condition Wrinkled
- Label (Pallet) Barcode Wrong

The screenshot shows a form titled "Issue Detail: (REQUIRED)". It contains three cascading dropdown menus. The first dropdown is labeled "Item/Subject:" and has the placeholder text "Select an Issue Type first". The second dropdown is labeled "Characteristic/Activity:" and has the placeholder text "Select an Item/Subject first". The third dropdown is labeled "Nonconformance:" and has the placeholder text "Select a Characteristic/Activity first". A green box highlights the three dropdown menus.

- If you don't find a finable option, select "Other", but you will receive an email:
 - You recently selected and saved the value "Other" in the Issue Detail fields. Please let me know what value should be added in order to meet your needs.
 - Simply "Reply All" to this email.

General Information-Any 8D



Repeated Issue is a critical question, it allows you Regal define if the previous 8D documented was effective.

- It is a required field, If Yes
 - Expanding information requiring “Repeat of 8D Number”
 - 8D Numbers can be added as required.
 - Write in each field only one 8D number.

General Information

8D Title: (REQUIRED)

Opened: (REQUIRED) 22-Oct-2018 by Hilda Flores

8D Type: (REQUIRED) Repeated Issue? (REQUIRED) Yes No Unknown

Issue Type: (REQUIRED) Repeat of 8D Number:

Issue Detail: (REQUIRED)

Item/Subject:

Characteristic/Activity:

Nonconformance:

Repeated Issue? (REQUIRED) Yes No Unknown

Viewable by: Team plus all Users with Full Access Team Only

- Defaults viewable by to
- “Team plus all Users with Full Access”
 - This apply to all Regal employees, all plants.
 - This should not be unselected unless the 8D is for our teams in the Plant Valparaiso.
- “Team Only”
 - This is reserved for Aerospace (Valparaiso Team)

If “team only” selected by other sites/teams than Valparaiso, the administrative team will look for disciplinary measurements.



Customer 8D Information

- Only appears if Customer 8D type is selected.
- Select or **add** Customer, by selecting “**Can’t find the Customer you need?**”

Customer 8D Information

Customer: (REQUIRED) [Can't find the Customer you need?](#)

Corrective Action Number: *Enter the customer's 8D number or equivalent for reference.*

Major Customer Escape? (REQUIRED) Yes No

- Enter the customer’s 8D number for reference
- Major Escape:
 - Defaulted “No”
 - Indicate “Yes” if issue is a major escape, ie: high costs, line shutdown.

If your customer is not found frequently, work with your sales group and contact the Administrators team to update the drop list.



Customer 8D Information

- Enter part numbers, quantities and date code or serial numbers if known.
 - Add another set of information as required.

Models/Parts:

Regal Model Number (REQUIRED)	Customer Part Number	Number of Parts Rejected (REQUIRED)	Date Code / Serial Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Customer Material Return Information

This section must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Does this issue require material to be returned by the customer? Yes No

Return Authorization Number:

Quantity Returned:

- Does the issue require material to be returned by customer?
 - Defaulted “Yes”
 - Indicate if RMA is warranted and quantity returned.
 - Indicate “No” if necessary
 - You will be required to explain why material does not need to be returned.



Supplier-External 8D Information

- Only appears if [Supplier-External](#) 8D type is selected and Issue Type: Audit (ISO), Packaging or Quality Product
- 8D Type: [Supplier-External](#)
 - Select or [add](#) Supplier by selecting “[Can't find the Supplier you need?](#)”

The screenshot shows a form titled "Supplier 8D Information" with the following fields:

- Supplier:** (REQUIRED) - A text input field with a green background, containing the text "[Can't find the Supplier you need?](#)".
- Commodity Group:** (REQUIRED) - A dropdown menu with a green background.
- Commodity Family:** (REQUIRED) - A dropdown menu with a green background.
- Component Part Number:** (REQUIRED) - A text input field with a green background, followed by a question mark icon and an "Add Another" button.

- Select Commodity Group & Family, which cascades.
 - Commodity group drop list is grouped by Region and BU
 - For further detail about the NA Commodity Group click on the next link →

[Direct Sourcing Team and Commodity Responsibility](#)

- Add one or more part numbers (as identified in the ERP system)
- 8D Type: [Supplier-Internal](#) (Regal to Regal)
 - Select Supplier

The screenshot shows a form titled "Supplier 8D Information" with the following fields:

- Supplier:** (REQUIRED) - A text input field with a green background.
- Component Part Number:** (REQUIRED) - A text input field with a green background, followed by a question mark icon and an "Add Another" button.




Supplier-External and Internal 8D Information (Supplier Impact Information)

- This section is critical, it support Regal to measure the performance of our suppliers

Supplier Impact Information

Impact information must be finalized by a Regal employee on this 8D team before this 8D can be marked Completed.

The impact information below is: Preliminary Finalized  *Impact information should be finalized as soon as possible.*

Quantity Received: *Amount of units received in the affected PO.*

Quantity Rejected: *If 100% inspected or reworked, provide final count.
Otherwise, calculate best estimate of final count as follows:
(quantity not in spec / quantity sampled) × total quantity received*

Escape to Customer: Yes No **2**

Line Stoppage / Downtime: Yes No **3**

Lost Productivity: Yes No **3**

- Quantity Received: Amount our units received in the affected Purchase Order (PO)
- Quantity Rejected: Be sure that the amount reported is calculated correctly.

Supplier Performance Metrics:

1. Quantity Rejected: PPM's
2. Escape to Customer: Incident's Customer Claims
3. Line Stoppage/Downtime and Lost Productivity: Line Rate Impact

Note: The amount of Quantity Rejected is used to calculate the Supplier Performance in junction with the Guidelines



Once 8D is ready to complete, the Lead Plant 8D Leader before this 8D should mark finalized, and complete the 8D.




Supplier-External and Internal 8D Information (Supplier Impact Information)

- By default **Escape to Customer, Line Stoppage and Lost Productivity** are “No”.
 - If “Yes” Expanding information requiring details.
 - Productivity Rate Change: This parameter will need to be defined by plant according to their internal systems, TAKT time or equivalent might be used.

Supplier Impact Information

Impact information must be finalized by a Regal employee on this 8D team before this 8D can be marked Completed.

The impact information below is: Preliminary Finalized  *Impact information should be finalized as soon as possible.*

Quantity Received: *Amount of units received in the affected PO.*

Quantity Rejected: *If 100% inspected or reworked, provide final count.
Otherwise, calculate best estimate of final count as follows:
(quantity not in spec / quantity sampled) × total quantity received*

Escape to Customer: Yes No

Customer Charging Regal: Yes No

Customer Charge Number: *Specify control number or equivalent from customer.*

Line Stoppage / Downtime: Yes No

Downtime Hours: *Specify how many hours the line was stopped.*

Lost Productivity: Yes No

Productivity Rate Change: *Specify what the productivity was before and after (using TAKT time or equivalent).*



Once 8D is ready to complete, the Lead Plant 8D Leader before this 8D should mark finalized, and complete the 8D.



Supplier Cost Information

- Supplier shall be responsible for costs, losses, expenses and other damages arising from Supplier's failure to meet the specifications.
- Fill all costs, and marked the 8D as Preliminary.
- Once 8D is ready to complete, the Lead Plant 8D Leader before this 8D can be marked finalized, and complete the 8D.
- All amounts should be rounded to the nearest US Dollar.

Supplier Cost Information

Cost information must be finalized by a Regal employee on this 8D team before this 8D can be marked Completed. Guidelines and examples for various costs have been provided by Regal below. All amounts should be rounded to the nearest US Dollar.

The information below is: Preliminary Finalized ! Information should be finalized as soon as possible.

Material	Value-added Material Cost	\$ <input type="text"/>	<i>Example: machining costs when porosity is found downstream in the production process.</i>
	Spot Buy	\$ <input type="text"/>	<i>Any cost difference to obtain replacement parts.</i>
Labor	Hourly / OT / Salary	\$ <input type="text"/>	<i>Set standard rate. Fully burdened/hourly vs. salary.</i>
	Rework	\$ <input type="text"/>	<i>Labor and OH, additional material PER PART.</i>
	In-house Sort / Inspection	\$ <input type="text"/>	
	Admin flat fee for the 8D	\$ <input type="text"/>	<i>Fee for 8D preparation.</i>
Production	Lost Capacity / Down Time	\$ <input type="text"/>	
	Alternate Process Costs	\$ <input type="text"/>	<i>Example: Machine from bar stock.</i>
Transportation	Logistics Costs	\$ <input type="text"/>	<i>Transportation of scrap/replacement material, expedites, returns.</i>
	Custom Duty	\$ <input type="text"/>	
Other	Customer Chargebacks	\$ <input type="text"/>	
	3rd Party Costs	\$ <input type="text"/>	<i>Provide invoice to supplier.</i>
	Additional Administrative Costs	\$ <input type="text"/>	<i>Include engineering, documentation, manage non-standard process based on hours involved.</i>
	Other	\$ <input type="text"/>	
Total Cost:		\$0	

Cost Explanation:
Include any supporting information for calculations entered above - e.g. hours and rates used. When necessary, supporting documentation can be added as attachments to the 8D.

By Default all Full 8D "Admin flat fee for the 8D" is \$150.00
 Corporate Standard Operating Procedure available for Regal Team.
 Detailed Standard Operating Procedure from specific sites can be shared for benchmarking



Supplier Cost Information

- Once the Lead Plant 8D Leader has marked finalized
- A new section will prompt
- Cost Recovery Information
- Plant Finance team will need to provide the detailed information to be sure 8D cost has been recovered.

Supplier Cost Information

Cost information must be finalized by a Regal employee on this 8D team before this 8D can be marked Completed.
Guidelines and examples for various costs have been provided by Regal below. All amounts should be rounded to the nearest US Dollar.

The cost information below is: Preliminary Finalized After saving, only a team member who is an administrator can edit cost information.

Cost Recovery Information

Cost Recovery information must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Cost Recovery Expected: (REQUIRED) Yes No

Reason: (REQUIRED)
Explain why costs will not be recovered.

Cost Recovery Information

Cost Recovery information must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Cost Recovery Expected: (REQUIRED) Yes No

Cost Recovery Information

Cost Recovery information must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Cost Recovery Expected: (REQUIRED) Yes No

Costs have been Recovered: (REQUIRED) Yes Not yet Costs should be recovered as soon as possible.

Cost Recovery Information

Cost Recovery information must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Cost Recovery Expected: (REQUIRED) Yes No

Costs have been Recovered: (REQUIRED) Yes Not yet

Amount Recovered: (REQUIRED) \$

Credit or Debit Memo Number: (REQUIRED)

Date of Credit or Debit Memo: (REQUIRED)

By Default all Full 8D “Admin flat fee for the 8D” is \$150.00

The final amount recovered, might be different than the Finalized amount reported.

Corporate Standard Operating Procedure available for Regal Team.

Detailed Standard Operating Procedure from specific sites can be shared for benchmarking



If needed to update, after once finalized, contact the System Administrators.





Supplier 8D Information: Supplier Material Rejection Information

- This section must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Supplier Material Rejection Information Edit

⚠ *Material Rejection information must be completed by a Regal employee on this 8D team before the 8D can be marked Completed.*

Return Authorization Number: *Not specified.*

- Defaulted: “Yes”

Supplier Material Rejection Information

This section must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Does this issue require material to be returned to the supplier? Yes No

Return Authorization Number: ?

Enter the Return Material Authorization Number provided by the supplier. X

- If “No”, explain why material does not need to be returned.

Supplier Material Rejection Information

This section must be completed by a Regal employee on this 8D team before this 8D can be marked Completed.

Does this issue require material to be returned to the supplier? Yes No

Reason:
Explain why material does not need to be returned.



NPD 8D Information

- Only appears if NPD 8D type is selected
- NPD Engineers are responsible to create
- Pay attention to the “?” for detailed information.

NPD 8D Information The name of the NPD or other project in which the failure occurred. [X]

Project: (REQUIRED) [Text Field] [?]

OER Number / EDGE ID: [Text Field]

Test: (REQUIRED) [Text Field]

Test Information:
Include site/location, test stand, operator, time of failure, test history, incident date/time.

[Text Area]

Failed Unit Information Enter items such as the marketing product name, engineering name, project name, product line, and any other identifying information for the failed unit. [X]

Product Name / Family: (REQUIRED) [Text Field] [?]

LabTrack ID(s): [Text Field] [Text Field] [Text Field] [?] [Add More]

Regal Model Number: [Text Field]

Date Code / Serial Number: [Text Field]

Additional Information:
Include Unit background, history, other identification, production date, quantity of failures.

[Text Area]

Failed Subcomponent Information:
Include identifying information about any failed subcomponent, such as part number, description, supplier, supplier part number, supplier serial number, reference designator for electronic components, date produced, etc.

[Text Area]

NPD Detailed training material can be found in the “Regal Resource Material” section



The team

Any 8D



Team Member Information (names and roles)

- The default team members are automatically added in the role(s) specified to every 8D that has the corresponding combination of values.

– Example

Default Team Members		
<i>The following people will be added to the 8D Team.</i>		
Team Role	Name	
Member <input type="text" value="Member"/>	Hilda Flores	<i>Defaulted onto team due to 8D creation.</i>
Oversight	Hilda Flores	<i>Defaulted as Oversight due to 8D Type selection.</i>
Oversight	Riza Puentespina	<i>Defaulted as Oversight due to 8D Type selection.</i>
Oversight	Joven Kionisala	<i>Defaulted as Oversight due to 8D Type selection.</i>
Member	<input checked="" type="checkbox"/> Karthik Reddy Kandhadi	<i>Defaulted as Member due to Commodity Family selection.</i>
Member	<input checked="" type="checkbox"/> Francisco Javier Ortega	<i>Defaulted as Member due to Commodity Family selection.</i>
<input checked="" type="checkbox"/> <i>Email notification of this 8D will be automatically sent from your email address to those indicated above. You will be cc'd.</i>		

- Customer, Other, Supplier – Internal: By plant or by Issue Type
- Supplier External: By plant, by Issue Type and by Commodity Family
- NPD

Changes can be made to the default team members values via the corresponding Administration Team

Note: When identified that you are no longer the default team member for a specific group (above mentioned) report to the Administration team, you can be added to the new group, but you won't be able to be removed, that will need to be done by yourself manually.

Administrators should not be removed from the team in the External Supplier, if needed they will be added in other 8D Types to support on the 8D.

Add Team Members-Any 8D



Team Member Information (names and roles)

- ❑ Champion, Leader and Oversight are all special roles. Creator defaults as leader but can be changed after saving.

- ❑ Leaders responsible for 8D activity at their site, one leader for Supplier and one for Regal.
No more than one leader by site

- ❑ Members are active participants to the process.

- ❑ Champion is only checked for complex 8Ds needing one Regal facilitator over Leaders

- ❑ Oversights are administrative personnel who do not receive emails, but can edit.

Team

⚠ Ensure that the correct Commodity Manager and SDE are present on the team.

Name	Email Address	Phone Number	Role ?	Remove
Current Team Members				
Hilda Flores	hilda.flores@regalbeloit.com	(915) 860-5749	<input type="radio"/> Member <input checked="" type="radio"/> Special Role ... <input type="checkbox"/> Champion <input checked="" type="checkbox"/> Leader <input checked="" type="checkbox"/> Oversight	<input type="checkbox"/>
Joven Kionisala	joven.kionisala@regalbeloit.com	1 606 564 2110 (7257)	<input type="radio"/> Member <input checked="" type="radio"/> Special Role ... <input type="checkbox"/> Champion <input type="checkbox"/> Leader <input checked="" type="checkbox"/> Oversight	<input type="checkbox"/>
Riza Puentespina	riza.puentespina@regalbeloit.com	1 606 564 2110 (7277)	<input type="radio"/> Member <input checked="" type="radio"/> Special Role ... <input type="checkbox"/> Champion <input type="checkbox"/> Leader <input checked="" type="checkbox"/> Oversight	<input type="checkbox"/>

Add Team Members
Don't use group addresses like sales@example.com. Tell us more.

Member Special Role ...

Default

⚠ Any person added with an email address can potentially edit this 8D. Click [here](#) to add a person without an email address.

Team Role

Name
Chris Follis

Defaulted as a Leader due to 8D creation.

Add Team Members-Any 8D



Email Address Constrains and Selecting

- Go to the “Tell me more” for the details.

Team

Ensure that the correct Commodity Manager and SDE are present on the team.

Name	Email Address	Phone Number	Role ?	Remove
Current Team Members				
Hilda Flores	hilda.flores@regalbeloit.com	(915) 860-5749	<input type="radio"/> Member <input checked="" type="radio"/> Special Role ... <input type="checkbox"/> Champion <input checked="" type="checkbox"/> Leader <input checked="" type="checkbox"/> Oversight	<input type="checkbox"/>
Joven Kionisala	joven.kionisala@regalbeloit.com	1 606 564 2110 (7257)	<input type="radio"/> Member <input checked="" type="radio"/> Special Role ... <input type="checkbox"/> Champion <input type="checkbox"/> Leader <input checked="" type="checkbox"/> Oversight	<input type="checkbox"/>
Riza Puentespina	riza.puentespina@regalbeloit.com	1 606 564 2110 (7277)	<input type="radio"/> Member <input checked="" type="radio"/> Special Role ... <input type="checkbox"/> Champion <input type="checkbox"/> Leader <input checked="" type="checkbox"/> Oversight	<input type="checkbox"/>

Add Team Members
Don't use group addresses like sales@example.com. [Tell me more.](#)

Any person added with an email address can potentially edit this 8D. [Click here](#) to add a person.

What's wrong with group email addresses?

Email addresses that do not use an individual name — including those that identify a group or role whose recipient(s) may change over time — cause issues with terms of use and prevent tracking of individual responsibility for actions taken in Global 8D. They are therefore prohibited by Regal's security policy.

What should I do?

Only add individuals to the team using **individual email addresses**. These are email addresses that identify a distinct individual in the email address itself, such as "frank.smith@example.com".

What will happen if I use a group email address?

Although Global 8D will not prevent you from adding a group email address, anyone trying to use that email address to access Global 8D will be prevented during security screening. At that point, they will need to contact you or another team member so you can add them to the team using the appropriate individual email address. You can save a lot of time by using an individual email address from the start.

What if I only have a group email address?

If you need to invite a participant from a group and you do not have access to an appropriate individual email address, you should first send email to that group directly. In that email, request that the group recipients provide you with one or more individual email addresses so that you can add them to the team.

Add Team Members-Any 8D



identify team members from other 8D's (Step 1 of 2)

- A. if you know the 8D in which you have the team members you would like to copy
- B. If there are previous 8D's for the same Supplier, you can select team members from those(last 5)
- C. From previous 8D's created by you (last 5)

Add Email Addresses from Another 8D Step 1 of 2: Select 8D

Enter an 8D number or select one of the 8Ds below.

8D Number: Select **A**

ADVANCED WITNESS SERIES INC

Limited to the 5 most recently updated 8Ds with the same Supplier.

There are currently no 8Ds with the same Supplier. **B**

My 8Ds

Limited to the 5 most recently updated 8Ds where you are on the team.

	8D #	Title	Last Update
Select	<u>11067</u>	Bow can 215C4025-24	02-Jul-2018
Select	<u>7489</u>	Rexnord Industries 0364963 Broken Fan	02-Jul-2018
Select	<u>7244</u>	Ensinger Precision Components-25SSB NYLATRON 10 FT-1688407-Chain is kinking up while in use	02-Jul-2018

Cancel

Add Team Members-Any 8D



identify team members from other 8D's (Step 2 of 2)

- Mark up as desired to copy.

Add Email Addresses from Another 8D Step 2 of 2: Select Addresses

Select the email addresses to add to the team.

8D #11067

Select	Role	Name	Email Address
<input type="checkbox"/>	Champion Leader	Lu King	king@artall.com
<input type="checkbox"/>	Leader	Julio Esparza	julio.esparza@regalbeloit.com
<input type="checkbox"/>	Member	Janet Chen	janet.chen@regalbeloit.com
<input type="checkbox"/>	Member	Sean Li	sean.li@regalbeloit.com
<input type="checkbox"/>	Member	Vinson Dang	vinson.dang@regalbeloit.com
<input checked="" type="checkbox"/>	Oversight	Hilda Flores	hilda.flores@regalbeloit.com
<input checked="" type="checkbox"/>	Oversight	Joven Kionisala	joven.kionisala@regalbeloit.com
<input type="checkbox"/>	Oversight	Paul Boyer	paul.boyer@regalbeloit.com
<input checked="" type="checkbox"/>	Oversight	Riza Puentespina	riza.puentespina@regalbeloit.com

<< Previous Add Selected Cancel



Team Member Information

- > Supplier 8Ds need to always include a Supplier representative, the Commodity Manager (CM) & Supplier Development Engineer (SDE).
- > Added members need to request access, if not, they will keep receiving emails without being able to edit the 8D.
- > Asterisks indicate added members who have not requested access.

General & D0 Information

Team

Attachments 0

Assignments 0

8D Log 6

8D Detail Report [options]

Email Team

Team Edit					
To send email to a team member, click their email address.					
Team Role	Name	Email Address	Phone Number		
Champion	Todd Marciniak	tmarciniak@norlen.com	1-715-359-1399	*	View
Leader	Sheryl Olson	sheryl.olson@regalbeloit.com	(715) 284-5862		View
Member	Bill Kernz	bill.kernz@regalbeloit.com	(715) 284-5203		View
Member	Crystal Brown	crystal.brown@regalbeloit.com	(859) 727-5750		View
Oversight	Hilda Flores	hilda.flores@regalbeloit.com	(915) 860-5749		View
Oversight	Joven Kionisala	joven.kionisala@regalbeloit.com	1 606 564 2110 (7257)		View
Oversight	Riza Puentespina	riza.puentespina@regalbeloit.com	1 606 564 2110 (7277)		View

* Individual does not have an active PrismPortal.net account.
Contact information may be unconfirmed or out-of-date.

Note: If Supplier-External 8Ds is detected with no representative, it will be cancelled by administration team.



Added to Team (Email)

- Instructions
- Important contacts
- Summary of the 8D
- Critical Links
 - 8D itself
 - 8D PRISM system
 - Tutorial
 - Emails

The information below was generated by Regal Global 8D.

Based on characteristics of the 8D, you were automatically added to the team for 8D #12288.

Regal Corrective Action Instructions

- Step 1** Click <https://www.global8d.com/regalbeloit/>, then enter the 8D # to view and/or edit this corrective action.
- Step 2** Identify your role and responsibilities. If you are not listed as a Team Champion or Team Leader in the below section, you are a Member only. **Members** are active participants in the process, supporting the Leaders. **Leaders** are responsible for 8D activity at their site, one leader for each site involved. **Champion** is only checked for complex 8Ds needing one Regal facilitator over Leaders. **Oversights** are defaulted administrative personnel who do not receive emails, but can edit on behalf of the team.
- Step 3** Read our [Tutorial](#) for further information on how to use the software.
- Step 4** Contact Team Leader if you have questions on why you were added.
- Step 5** Contact the following system administrators after reading the tutorial if you need further assistance with the following 8D types:
Supplier-External: hilda.flores@regalbeloit.com
Customer, Supplier-Internal (Regal to Regal), & Other: Hilda.Flores@regalbeloit.com
New Product Development: blane.baumgartner@regalbeloit.com

8D #: 12288 (details at <https://www.global8d.com/regalbeloit/>)
8D Title: TEST 2018 OCT RELEASE
8D Status: Open
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 24-Oct-2018
Team Champion(s): Not specified.
Team Leader(s): Not specified.

8D Type: Supplier - External
Lead Plant: 6M - @ 6M
Issue Type: Product Quality
Issue Detail: Shaft - Length - Oversized
Repeated Issue? Yes
Repeat of 8D Number: 2100

Supplier 8D Information

Supplier: PROP SHAFT SUPPLY INC.@56397
Commodity Group: NA - Corporate Metals Team
Commodity Family: Shafts
Escape to Customer? Yes
Component Part Number: XXXX
Quantity Received: 10,000
Quantity Rejected: 23
Total Cost: \$150 (preliminary)

Supplier Material Rejection Information

This issue does not require material to be returned to the supplier.
Reason: VIDEOS AND PHOTOS TO BE PROVIDED AND LOOK TO SCRAP IN HOUSE

You may now be able to participate on this 8D online at (registration required): <https://www.global8d.com/regalbeloit/>

If you have questions about why you were added to this 8D Team, you should contact your system administrator.



Attachments

- Each D-Step can have attachments, but all attachments can be accessed and added from here. View may vary by released version.
- 3MB max per attachment, but unlimited quantity.

Full 8D

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

Attachments
None.

D0 Only

17331 - CIXI B-205007A 3752637 Height to center of stud bolt hole U/S red tag# 533279

Status
8D Status: Open as of 01-May-2020 by Wendy Greer

Attachments

Description	Type	Size	Attached by	Date
measurements	PDF	54 KB	Wendy Greer	01-May-2020

Attachments

Add a File
New attachments are limited to 3072 KB (3 MB) in
If no description is provided, the filename will be u

D-Step: <none>
Description:
File:

Add a URL
A full URL must be specified (including http://, http

D-Step: <none>
Description:
URL: http://

Save and Return Save and Add More

Assigning Actions



Assignments

- Assign specific tasks to team members using the **Action What** format.
 - Provide dimensional data after corrective action.
 - Review specifications for potential updates.

The screenshot displays the 8D process interface. The main window shows the status of a problem (4518 - Carrier RCD Model A Box Label Barcode Wrong) with an 8D Status of 'Open' and a D-Step Status of 'D2 not yet complete'. A green box highlights the 'Add an Assignment' button. A modal window titled 'Assignment Detail' is open, showing fields for 'Statement', 'Assignee', 'Associated With', 'Description', 'Given On', 'Due On', and 'Completed On'. A green box highlights the 'Supporting Detail / Results' field. The modal also has a 'Notification' section with a checkbox for 'After saving, help me compose an email to the Assignee.' and 'Save and Return' and 'Cancel' buttons. The interface also shows a 'Full 8D' view and a 'D0 Only' view for a different problem (47331 - CIXI B-205007A 3752637 Heigh to center of stud bolt hole U/S red tag# 533279).

Note: D0 needs to have an assignment focused on confirming effectivity.



8D Log

- Automatically logs key D-Step entries, but also allows for manual entries and the option to include such in the actual 8D Report. View may vary by released version.

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status: 8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

8D Log

Date	Description	Entered By
14-May-2015	Target Date for D3 completion changed from 13-May-2015 to 15-May-2015. Target Date for D5 completion changed from 13-May-2015 to 15-May-2015. TBD	Chris Follis
11-May-2015	Target Date for D3 completion changed from 09-May-2015 to 13-May-2015. TBD	Chris Follis
11-May-2015	D2, D3 marked incomple	Chris Follis
11-May-2015	D2, D3 marked complete	Chris Follis
08-May-2015	Team Leader added: Chris Follis (Defaulted as a Leader due to 8D creation.)	Chris Follis

17331 - CIXI B-205007A 3752637 Heigth to center of stud bolt hole U/S red tag# 533279

Status: 8D Status: Open as of 01-May-2020 by Wendy Greer

8D Log

Show: Key log entries (2 additional entries hidden)

Date	Description	Entered By
01-May-2020	Review Group changed from "Lebanon - @ LB - General Quality Review" to "Lebanon - @ LB - General Quality Review (D0-only 8Ds)". Any existing approvals v	System Administrator
01-May-2020	Email Sent To: george.cathil@regalbeloit.com	Wendy Greer

8D Log Entry

Log Entries cannot be edited once saved. The Entries selected for display on the 8D Detail Report

Date	Description (REQUIRED)
<input type="checkbox"/> 14-May-2015	

8D Log

Entries selected for display on the 8D Detail Report

Date	Description
<input type="checkbox"/> 14-May-2015	Target Date for D3 completion changed from 13-May-2015 to 15-May-2015. Target Date for D5 completion changed from 13-May-2015 to 15-May-2015. TBD
<input type="checkbox"/> 11-May-2015	Target Date for D3 completion changed from 09-May-2015 to 13-May-2015. TBD
<input type="checkbox"/> 11-May-2015	D2, D3 marked incomplete
<input type="checkbox"/> 11-May-2015	D2, D3 marked complete
<input type="checkbox"/> 08-May-2015	Team Leader added: Chris Follis (Defaulted as a Leader due to 8D creation.)
<input type="checkbox"/> 08-May-2015	8D opened and created



8D Report

- Print and/or save the 8D report.
- Related Escape, D5/D6 and D7 actions are grouped under each D4 cause.

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

8D Log

Date	Description	Entered By
14-May-2015	Target Date for D3 completion changed from 13-May-2015 to 15-May-2015. Target Date for D5 completion changed from 13-May-2015 to 15-May-2015. TBD	Chris Follis
11-May-2015	Target Date for D3 completion changed from 09-May-2015 to 15-May-2015. TBD	
11-May-2015	D2, D3 marked incomplete.	
11-May-2015	D2, D3 marked complete (pending review).	Chris Follis

Full 8D

8D Detail Report [options]

17331 - CIXI B-205007A 3752637 Heigth to center of stud bolt hole U/S tag# 533279

Status
8D Status: Open as of 01-May-2020 by Wendy Greer

8D Log

Date	Description	Entered By
01-May-2020	Review Group "Lebanon - @ approvals we General Quality Review" to only 8Ds". Any existing	System Administrator
01-May-2020	Email Sent: A To: george@cixihull.com, yunhui.le@regalbeloit.com, cathi.hildebrand@regalbeloit.com	Wendy Greer

D0 Only

Regal Global 8D #4518

General Information
Title: Carrier RCD Model A Box Label Barcode Wrong
8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015
8D Type: Customer
Lead Plant: IGMEX #6 Juarez, MX
Issue Type: Product Quality
Cross Reference: Not specified

Customer 8D Information
Customer: Carrier - East Syracuse
Customer Corrective Action Number: Not specified
Major Customer Escape? No
Component/Defect: Label (Box) - Barcode - Wrong
Regal Model Number: Not specified
Customer Part Number: Not specified
Number of Parts Rejected: 60
Date Code / Serial Number: Not specified

Customer Material Return Information
Reasons: Customer accepted product as is, but wants it corrected.

D0 - Symptoms
Symptoms information not specified

D0 - Emergency Response Actions (ERA)
Action information not specified

D1 - Team

Name	Role	Email Address	Phone
Chris Follis			

D2 - Problem
Problem information not specified

D3 - Interim Containment
ICA (1 of 3): Reshipped
Verified: 20-May-2015
Description: 1000 quantities received and 1000 quantities shipped at plant. 500 received at plant. 500 received at plant. 10 increased at plant.
Verification Description: Not specified
Validation Description: Not specified
ICA (2 of 3): Customer
Verified: No
ICA (3 of 3): Warehouse
Verified: No

D4 - Root Cause (1 of 1): Engineer entered wrong spec
Statement: Engineer entered wrong spec on drawing because customer file was outdated.
Verified: No
Description: W1 Engineer entered wrong spec on drawing
W2 Sales rep provided outdated customer file
W3 Customer did not forward updated file

D5/D6 - Permanent Corrective Actions (PCA)
Root Cause PCA (1 of 1): Created new customer spec & drew up new drawing.
Verified: 11-May-2015
Implemented: No
Verification Description: Kaizen event conducted by engineering.

D7 - Prevent Recurrence Actions (PRA)
Action information not specified.

D4 - Associated Escape Point
Escape Point information not specified.

D7 - Recommendations
Recommendation information not specified

D8 - Recognize Team
Recognition information not specified

Attachments
There are no attachments.

8D Log (selected entries)
None

Generated on 14-May-2015 by Chris Follis

Note: The most recommended auditing process is to run the Detailed Report and review that all the nested Ds are filled using the standards for 8Ds methodology



8D Report Options

- One can choose report format and whether to include assignments and log entries.

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

8D Log
Entries selected for display on the 8D Detail Report are indicated by a checkmark (✓).

Date	Description	Entered By
14-May-2015	Target Date for D3 completion changed from 13-May-2015 to 15-May-2015. Target Date for D5 completion changed from 13-May-2015 to 15-May-2015. TBD	Chris Follis
11-May-2015	Target Date for D3 completion changed from 13-May-2015 to 13-May-2015. TBD	Chris Follis
11-May-2015	D2, D3 marked incomplete. TBD	Chris Follis
11-May-2015	D2, D3 marked complete (pending review). TBD	Chris Follis
08-May-2015	Team Leader added: Chris Follis (Defaulted as a Leader due to 8D creation.)	Chris Follis

Full 8D

17331 - CIXI B-205007A 3752637 Heigth to center of stud bolt hole U/S red tag# 5332

Status
This is a D0-only 8D.
8D Status: Open as of 01-May-2020 by Wendy Greer

8D Log
Show: Key log entries (2 additional entries hidden)
Entries selected for display on the 8D Detail Report are indicated by a checkmark (✓).

Date	Description	Entered By
01-May-2020	Review Group "Lebanon - @ approvals we" General Quality Review" to only 8Ds". Any existing	System Administrator
01-May-2020	Email Sent: A To: george@cixihui.com, yunhui.le@regalbeloit.com, cathi.hildebrand@regalbeloit.com	Wendy Greer

D0 Only

8D Detail Report Options

Output Format: *PDF is recommended*

HTML
 PDF

Include Assignments? *"Open Only" included*

All
 Open Only
 None

Include 8D Log Entries? *"Selected Only" included*

All
 Selected Only
 None

Position 8D Log Entries:

Near the top
 At the bottom



Email Team

- Team members can create additional emails beyond the system created ones, that auto loads content of the 8D for easy reference. View may vary by released version. Check the box at bottom to save email record.

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

8D Log

Date	Description	Entered By
14-May-2015	Target Date for D3 completion changed from 13-May-2015 to 15-May-2015. Target Date for D5 completion changed from 13-May-2015 to 15-May-2015.	Chris Follis
11-May-2015	Target Date for D3 completion changed from 13-May-2015 to 15-May-2015.	Chris Follis
11-May-2015	D3 marked incomplete.	Chris Follis

17331 - CIXI B-205007A 3752637 Heigth to center of stud bolt hole U/S red top 533279

Status
8D Status: Open as of 01-May-2020 by Wendy Greer

8D Log

Date	Description	Entered By
01-May-2020	Review Group "Lebanon - @ approvals we	System Administrator
01-May-2020	Email Sent: A To: george@cixihuil.com, yunhui.le@regalbeloit.com, cathi.hildebrand@regalbeloit.com	Wendy Greer

Email Notification

Send Message Cancel Message

Multiple email addresses may be separated by a semicolon, comma, or space. "@regalbeloit.com" will default if a domain is not specified.

From: chris.follis@regalbeloit.com
To:
CC: chris.follis@regalbeloit.com
Subject: Regal 8D #4518 - Carrier RCD Model A Box Label Barcode Wrong

The following message will be sent. You may add text in the space below.

The information below was generated by Regal Global 8D.

8D #: 4518
8D Title: Carrier RCD Model A Box Label Barcode Wrong
8D Status: Open
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015
Team Champion(s): Not specified.
Team Leader(s): Chris Follis
8D Type: Customer
Lead Plant: IGMEX #6, Juarez, MX
Issue Type: Product Quality

Customer 8D Information
Customer: Carrier - East Syracuse.
Customer Corrective Action Number: Not specified.
Major Customer Escape? No
Component/Defect: Label (Box) - Barcode - Wrong

Models/Parts	Regal Model Number	Customer Part Number	Number of Parts Rejected	Date Code / Serial Number
Model A	Not specified.	60	Not specified.	

Customer Material Return Information
This issue does not require material to be returned by the customer.
Reason: Customer accepted product as is, but wants it corrected.
Information regarding this 8D can be accessed at: <https://www.global8d.com/regalbeloit/>

Store permanent copy of this email in the 8D Log.

Send Message Cancel Message



Email Notifications

- Team members receive email notifications using standard subjects in the following format:
- Regal 8D # – Notification – Title
- Content will vary, depending on the maturity of the 8D.

Note: No emails should be used outside PRISM system. PRISM advantage is that any Regal member can review the information to benchmark, track efficiency, work with Supplier, Customers and other sites.

Regal 8D #4518 - Target Date Changed - Carrier RCD Model A Box Label Barcode Wrong

The information below was generated by Regal Global 8D.

The Target Dates have been changed on 8D #4518 by Chris Follis on 11-May-2015.

Target Date for D3 completion changed from 09-May-2015 to 13-May-2015.

Comments:
TBD

8D #: 4518
8D Title: Carrier RCD Model A Box Label Barcode Wrong
8D Status: Open
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 13-May-2015
Complete through D5 by 13-May-2015

Team Champion(s): *Not specified.*
Team Leader(s): Chris Follis

8D Type: Customer
Lead Plant: IGMEX #6, Juarez, MX
Issue Type: Product Quality

Customer 8D Information

Customer: Carrier - East Syracuse,
Customer Corrective Action Number: *Not specified.*
Major Customer Escape? No
Component/Defect: Label (Box) - Barcode - Wrong

Models/Parts

Regal Model Number	Customer Part Number	Number of Parts Rejected	Date Code / Serial
Model A	<i>Not specified.</i>	60	<i>Not specified.</i>

Customer Material Return Information

This issue does not require material to be returned by the customer.
Reason: Customer accepted product as is, but wants it corrected.

Information regarding this 8D can be accessed at: <https://www.global8d.com/regalbeloit/>



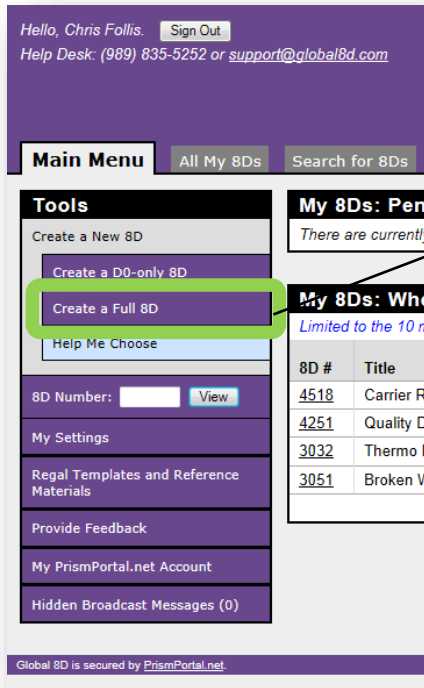
Creating a New 8D

Full 8D

FULL 8D	Team Initiating the 8D	Team Responsible to provide solution
General Information	X	
D0 - Symptom & Response	X	
D1 - Team	X	X
D2 - Problem	X	
D3 - Containment	X	X
D4 - Cause & Escape		X
D5 - Define Correction		X
D6 - Implement Correction		X
D7 - Prevent Recurrence		X
D8 - Recognition	X	X
Attachments	X	X
Assignments	X	X
Emails	X	X
Status	X	
Review	X	



- Select Create a Full 8D.



- Main Menu Screen

FULL 8D	Initiator	Responsible to provide solution
General Information	X	
D0 - Symptom & Response	X	
D1 - Team	X	
D2 - Problem	X	
D3 - Containment	X	X
D4 - Cause & Escape		X
D5 - Define Correction		X
D6 - Implement Correction		X
D7 - Prevent Recurrence		X
D8 - Recognition	X	X
Attachments	X	X
Assignments	X	X
Emails	X	X
Status	X	
Review	X	

Fill in the General Information section

[General Information – Any 8D](#)

Creating a Full 8D



- Target Dates
- Defining Target Dates is critical

– These need to be:



– Should consider for example:
Transportation time for samples
Location and time zones

– Default dates can be changed:

- By 8D or in “my settings”

– Dates for other D-Steps can be customized as well.

“by 8D” OR

“my settings”

Creating a Full 8D



D0 – Symptom & Response (Symptom Detail)

- Describe the symptom in one sentence.
- Provide detail like; customer impact, assembly problems & downtime.

12288 - TEST 2018 OCT RELEASE Exit

Status
8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) Change 8D Status
D-Step Status: D2 not yet complete Change D-Step Status
Next Target Date: Complete through D3 by 24-Oct-2018

D0 - Prepare for the G8D Process

Symptoms Add a Symptom
Not specified.

Emergency Response Actions (ERA) Add an Emergency Response Action
Not specified.

D0 Attachments Edit
None.

D0 Assignments Add an Assignment
None.

8D Detail Report [options]
Email Team

D0 - Symptom Detail

Symptom Statement: (REQUIRED)
Give a one-line description of this symptom.

Symptom Description/Quantification:
Describe this Symptom in detail. Be sure to provide quantification (specific, measurable data) that describes the symptom. Include when and where the data was collected. If quantification is provided in an attached file, it should be submitted with the symptom description.

D0-only 8D Issue transfers to here if expanded into Full 8D.

Save and Return Cancel



D0 – Symptom & Response (Attachments)

- Attach applicable files and links for data like; pictures, specs, drawings and/or lab reports. Same action can be done for each D-Step.
- Attachments can be added in each section as well. 3MB max per attachment, but unlimited quantity per 8D.

The screenshot displays the '12288 - TEST 2018 OCT RELEASE' 8D process. The left sidebar shows a navigation menu with 'D0 - Symptom & Response' selected. The main content area shows the 'D0 - Prepare for the G8D Process' section, which includes 'Symptoms', 'Emergency Response Actions (ERA)', 'D0 Attachments', and 'D0 Assignments'. The 'D0 Attachments' section is currently empty and has an 'Edit' button highlighted with a green box. A green arrow points from this 'Edit' button to an 'Attachments' modal window on the right. This modal window has two sections: 'Add a File' and 'Add a URL'. The 'Add a File' section includes a 'D-Step' dropdown set to 'D0', a 'Description' text box, and a 'File' field with a 'Browse...' button. The 'Add a URL' section includes a 'D-Step' dropdown set to 'D0', a 'Description' text box, and a 'URL' field with 'http://' pre-filled. At the bottom of the modal are 'Save and Return', 'Save and Add More', and 'Cancel' buttons.

Creating a Full 8D



- D0 – Symptom & Response (Assignments)
- Assign specific tasks to team members using the **Action What** format.
 - Provide dimensional data after corrective action.
 - Review specifications for potential updates.
- The system will send emails to the Assigned Team Member
- Same action can be done for each D-Step.

The screenshot displays the 8D process interface for case 12288 - TEST 2018 OCT RELEASE. The main window shows the D0 - Prepare for the G8D Process step, which includes sections for Symptoms, Emergency Response Actions (ERA), D0 Attachments, and D0 Assignments. A green box highlights the 'Add an Assignment' button in the D0 Assignments section. An arrow points from this button to the 'Assignment Detail' form on the right. The 'Assignment Detail' form includes fields for Statement, Assignee, Associated With, Description, Given On, Due On, and Completed On. It also has a 'Supporting Detail / Results' section and a 'Notification' section with a checkbox for 'After saving, help me compose an email to the Assignee.' The bottom of the form has 'Save and Return' and 'Cancel' buttons.

Creating a Full 8D



- D1 - Team
 - Team members will be defaulted according to information provided in the “[General Information-Any 8D](#)” and more team members can be added.
 - [Default and Add Team Members](#)
 - If others need to be informed that are not active members of the 8D process, use the “[email tool](#)” within PRISM versus adding them.

12288 - TEST 2018 OCT RELEASE [Exit]

Status
8D Status: Open as of 15-Oct-2018 by Hilda Flores [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D1 - Establish the Team
To send email to a team member, click their email address. [Edit]

Team Role	Name	Email Address	Phone Number	
Member	Francisco Javier Ortega	javier.ortega@regalbeloit.com	(915) 218-0613	[View]
Member	Karthik Reddy Kandhadi	karthik.kandhadi@regalbeloit.com	1 608 322 9009	[View]
Oversight	Hilda Flores	hilda.flores@regalbeloit.com	(915) 860-5749	[View]
Oversight	Joven Kionisala	joven.kionisala@regalbeloit.com	1 606 564 2110 (7257)	[View]
Oversight	Riza Puentespina	riza.puentespina@regalbeloit.com	1 606 564 2110 (7277)	[View]

D1 Attachments [Edit]
None.

D1 Assignments [Add an Assignment]
None.

Person Detail - 8D #12288

Name: Flores, Hilda
Email: hilda.flores@regalbeloit.com
Phone: (915) 860-5749
Access: Full [?]

Team Roles:
Oversight

Assignments:
None.

[Close]



- D2 – Problem
- Type a problem statement using same logic as 8D title; **Regal Model/Part Component/Part Name Feature/Characteristic Defect** (Other).
 - *Model A Shaft Length Oversized*
 - *Box Label Barcode Wrong* (SCAR 1234)
 - *Model B Bearing Failure* (Field Return)

12288 - TEST 2018 OCT RELEASE [Exit]

Status

8D Status: Open as of 15-Oct-2018 by Hilda Flores [Change 8D Status]

D-Step Status: D2 not yet complete [Change D-Step Status]

Next Target Date: Complete through D3 by 24-Oct-2018

D2 - Describe the Problem

Not specified. [Add Problem]

D2 Attachments [Edit]

None.

D2 Assignments [Add an Assignment]

None.

8D Detail Report [options]
Email Team

D2 - Describe the Problem

Problem Statement: (REQUIRED)
What is wrong with what?

[Green bar]

Problem Description:
What? When? Where? How Big?

[Empty text area]

Creating a Full 8D



- D2 – Problem
- Describe the issue answering the following questions: **Who?** / **What?** / **When?** / **Where?** / **Why?** / **How?** / **How many?**
 - **Customer** rejected **Model A** on **3/25/15** during **production** for **excessive noise** using human ear as gauge. (5 line rejects, causing 2 pallets of 120 to be held)
 - **Plant** rejected **Part B** on **3/25/15** at **receiving** for **oversized OD** using calipers. (3 rejected samples, causing entire lot of 300 to be rejected)

- > Add any evidence in the [Attachment](#) section and add [Assignments](#) when possible



D3 – Containment

- These actions are temporary for an interim period of time.
- Each inventory location requires its own entry because criteria may differ.
- Special documentation reviews or onsite services have their own entry also.

The screenshot displays the 8D software interface for a case titled "12288 - TEST 2018 OCT RELEASE". The interface includes a sidebar with navigation options such as "Status", "Target Dates", "General Information", "D0 - Symptom & Response", "D1 - Team", "D2 - Problem", "D3 - Containment", "D4 - Cause & Escape", "D5 - Define Correction", "D6 - Implement Correction", "D7 - Prevent Recurrence", "D8 - Recognition", "Attachments", "Assignments", "8D Log", "8D Detail Report", and "Email Team". The main content area shows the "D3 - Develop Interim Containment Actions" section, which includes fields for "8D Status" (Open), "D-Step Status" (D2 not yet complete), and "Next Target Date" (Complete through D3 by 24-Oct-2018). Below this, there are sections for "Interim Containment Actions (ICA)", "D3 Attachments", and "D3 Assignments", each with an "Add" button. A green highlight is visible over the "Add an Interim Containment Action" button.

> Inventory Locations

- Field
- Customer
- In Transit
- Warehouse
- Mfg Plant
- Supplier
- Open Orders

Responding a Full 8D



- D3 – Containment (statement)
- State each containment action using **Who Action What Where** format.
 1. **Supplier Reinspect** inventory at warehouse
 2. **Regal Reinspect** inventory at mfg plant
 3. **Customer Review** drawing / specification

12288 - TEST 2018 OCT RELEASE

Status

8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) [Change 8D Status](#)

D-Step Status: D2 not yet complete [Change D-Step Status](#)

Next Target Date: Complete through D3 by 24-Oct-2018

D3 - Develop Interim Containment Actions

Interim Containment Actions (ICA) [Add an Interim Containment Action](#)

None specified.

D3 Attachments [Edit](#)

None.

D3 Assignments [Add an Assignment](#)

None.

D3 - Interim Containment Action Detail

Action Statement: **(REQUIRED)**
Give a one-line description of this Action.

Action Description:
If necessary, describe this Action in detail.

Is this a Service Action? Yes No

Verification Description:
Before implementation, what was done to verify the effectiveness of this Action?

Target date for verification:

Date this Action was successfully verified:

Target date for implementation:

Date this Action was implemented:

Validation Description:
After implementation, what was done to validate the effectiveness of this Action?

Target date for validation:

Date this Action was successfully validated:

Removal information will remain editable until D6 is marked completed.

Target date for removal:

Date this Action was removed:

[Save and Return](#) [Cancel](#)

Responding a Full 8D



- D3 – Containment (description)
 - Describe each containment action using **Who Action What How** format.
 1. Supplier 100% sort and return to plant using calipers.
 2. Regal 100% repair onsite using attached instructions.
 3. Customer 100% top layer audit pallets visually and 100% inspect end frames with go/nogo gauge.

12288 - TEST 2018 OCT RELEASE

Status: 8D Status: Open as of 15-Oct-2018 by Hilda Flores

Target Dates: 3

D-Step Status: D2 not yet complete

Next Target Date: Complete through D3 by 24-Oct-2018

D3 - Develop Interim Containment Actions

Interim Containment Actions (ICA) [Add an Interim Containment Action]

Not specified.

D3 Attachments [Edit]

None.

D3 Assignments [Add an Assignment]

None.

8D Detail Report [options]

Email Team

D3 - Interim Containment Action Detail

Action Statement: (REQUIRED)
Give a one-line description of this Action.

Action Description:
If necessary, describe this Action in detail.

Is this a Service Action? Yes No

Verification Description:
Before implementation, what was done to verify the effectiveness of this Action?

Target date for verification: [Date Picker]

Date this Action was successfully verified: [Date Picker]

Target date for implementation: [Date Picker]

Date this Action was implemented: [Date Picker]

Validation Description:
After implementation, what was done to validate the effectiveness of this Action?

Target date for validation: [Date Picker]

Date this Action was successfully validated: [Date Picker]

Removal information will remain editable until D6 is marked completed.

Target date for removal: [Date Picker]

Date this Action was removed: [Date Picker]

Save and Return Cancel

Responding a Full 8D



- D3 – Containment (verify)
 1. Compared inspection criteria with customer.
 2. Verified GRR was acceptable before use.
 3. Attach all evidence possible.

12288 - TEST 2018 OCT RELEASE

Status: 8D Status: Open as of 15-Oct-2018 by Hilda Flores

Target Dates: D-Step Status: D2 not yet complete

Next Target Date: Complete through D3 by 24-Oct-2018

D3 - Develop Interim Containment Actions

Interim Containment Actions (ICA)

Add an Interim Containment Action

D3 Attachments

D3 Assignments

D3 - Interim Containment Action Detail

Action Statement: (REQUIRED)
Give a one-line description of this Action.

Action Description:
If necessary, describe this Action in detail.

Is this a Service Action? Yes No

Verification Description:
Before implementation, what was done to verify the effectiveness of this Action?

Validation Description:
After implementation, what was done to validate the effectiveness of this Action?

Target date for verification: [Date Picker]

Date this Action was successfully verified: [Date Picker]

Target date for implementation: [Date Picker]

Date this Action was implemented: [Date Picker]

Target date for validation: [Date Picker]

Date this Action was successfully validated: [Date Picker]

Target date for removal: [Date Picker]

Date this Action was removed: [Date Picker]

Removal information will remain editable until D6 is marked completed.

Save and Return Cancel



D3 – Containment (validate)

- Describe what was done to validate effectiveness, by summarizing results using How Many **What Action** format.
 - Customer Inventory Examples
 - 500 pumps and 100 motors sorted
 - 50 pumps repaired and 50 motors returned.
 - 40 motors repaired and 10 scrapped
 - Regal/Supplier Inventory Examples
 - 300 motors and 50 end frames sorted
 - 30 motors repaired
 - 10 end frames repaired and 10 scrapped.

12288 - TEST 2018 OCT RELEASE

Status: 8D Status: Open as of 15-Oct-2018 by Hilda Flores
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 24-Oct-2018

D3 - Develop Interim Containment Actions
Interim Containment Actions (ICA) [Add an Interim Containment Action]
None.

D3 Attachments [Edit]
None.

D3 Assignments [Add an Assignment]
None.

Target date for verification: [] []
Date this Action was successfully verified: [] []

Target date for implementation: [] []
Date this Action was implemented: [] []

Validation Description:
After implementation, what was done to validate the effectiveness of this Ac
[]

Target date for validation: [] []
Date this Action was successfully validated: [] []

Removal information will remain editable until D6 is marked completed.

Target date for removal: [] []
Date this Action was removed: [] []

[Save and Return] [Cancel]



D4 – Cause & Escape

- Each cause and escape is a separate entry.
 - Root Causes are for why it occurred
 - Escape Points is for why shipped or undetected.

12288 - TEST 2018 OCT RELEASE [Exit]

Status
8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D4 - Define and Verify Root Cause and Escape Point

Root Causes [Add a Root Cause]
Not specified.

Escape Points [Add an Escape Point]
Not specified.

D4 Attachments [Edit]
None.

D4 Assignments [Add an Assignment]
None.

General Information
D0 - Symptom & Response 0
D1 - Team 5
D2 - Problem 0
D3 - Containment 0
D4 - Cause & Escape 0
D5 - Define Correction 0
D6 - Implement Correction 0
D7 - Prevent Recurrence 0
D8 - Recognition 0
Attachments 0
Assignments 0
8D Log 7

8D Detail Report [options]
Email Team



D4 – Cause

- State occurrence cause using a **What Who Action/Condition** (5Ms) format.
 - **Insertor tooling worn and damaged** (Machine)
 - **Operator forgot to install screw** (Man)
 - **Engineer entered wrong spec on drawing** (Man)

12288 - TEST 2018 OCT RELEASE [Exit]

Status
Target Dates 3

8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D4 - Define and Verify Root Cause and Escape Point

Root Causes [Add a Root Cause]
Not specified.

Escape Points [Add an Escape Point]
Not specified.

D4 Attachments [Edit]
None.

D4 Assignments [Add an Assignment]
None.

D4 - Root Cause Detail

Root Cause Statement: (REQUIRED)
Give a one-line description of this Root Cause.

Root Cause Description:
If necessary, describe this Root Cause in detail.

Verification Description:
What was done to verify that this Root Cause actually contributed to the D2 Problem?

Target date for verification:
Date this Root Cause was successfully verified:
Percent Contribution: %
What percent of the D2 Problem is attributed to this Root Cause?

[Save and Return] [Delete] [Cancel]



D4 – Cause

- 5 Why description may be needed to clarify root cause path.
 - W1 Engineer entered wrong spec on drawing
 - W2 Sales rep provided outdated customer file
 - W3 Customer did not forward updated file

12288 - TEST 2018 OCT RELEASE

Status: Open as of 15-Oct-2018 by Hilda Flores

D-Step Status: D2 not yet complete

Next Target Date: Complete through D3 by 24-Oct-2018

D4 - Define and Verify Root Cause and Escape Point

Root Causes: Not specified. **Add a Root Cause**

Escape Points: Not specified. Add an Escape Point

D4 Attachments: None. Edit

D4 Assignments: None. Add an Assignment

D4 - Root Cause Detail

Root Cause Statement: (REQUIRED)
Give a one-line description of this Root Cause.

Root Cause Description:
If necessary, describe this Root Cause in detail.

D0-only 8D Cause transfers to here if expanded into Full 8D.

Verification Description:
What was done to verify that this Root Cause actually contributed to the D2 Problem?

Target date for verification:

Date this Root Cause was successfully verified:

Percent Contribution:
What percent of the D2 Problem is attributed to this Root Cause? %

Save and Return Delete Cancel



D4 – Cause

- Describe what was done to verify cause actually contributed.
- Provide verification of cause and dates.
- Enter percent contribution of problem.

12288 - TEST 2018 OCT RELEASE [Exit]

Status
8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D4 - Define and Verify Root Cause and Escape Point

Root Causes [Add a Root Cause]
Not specified.

Escape Points [Add an Escape Point]
Not specified.

D4 Attachments [Edit]
None.

D4 Assignments [Add an Assignment]
None.

D4 - Root Cause Detail

Root Cause Statement: (REQUIRED)
Give a one-line description of this Root Cause.

Root Cause Description:
If necessary, describe this Root Cause in detail.

Verification Description:
What was done to verify that this Root Cause actually contributed to the D2 Problem?

Target date for verification: []

Date this Root Cause was successfully verified: []

Percent Contribution: [] %
What percent of the D2 Problem is attributed to this Root Cause?

[Save and Return] [Delete] [Cancel]

Responding a Full 8D



D4 – Escape (identify)

- State escape cause using a **What Who Action/Condition** (5Ms) format.
 - Tester meter malfunctioned (Machine)
 - Micrometer out of calibration (Machine)
 - Operator forgot to inspect part (Man)

12288 - TEST 2018 OCT RELEASE

Status
8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) [Change 8D Status](#)
D-Step Status: D2 not yet complete [Change D-Step Status](#)
Next Target Date: Complete through D3 by 24-Oct-2018

D4 - Define and Verify Root Cause and Escape Point

Root Causes [Add a Root Cause](#)
Not specified.

Escape Points [Add an Escape Point](#)
Not specified.

D4 Attachments [Edit](#)
None.

D4 Assignments [Add an Assignment](#)
None.

D4 - Escape Point Detail

Escape Point Statement: (REQUIRED)
Give a one-line description of this Escape Point.

Escape Point Description:
If necessary, describe this Escape Point in detail.

Verification Description:
What was done to verify the accuracy of this Escape Point, and when.

Target date for verification:

Date this Escape Point was successfully verified:

[Save and Return](#) [Cancel](#)

Responding a Full 8D



D4 – Escape (identify)

- 5 Why description may be needed to clarify escape path.
 - W1 JIB did not require inspection
 - W2 QE did not add requirement to control plan
 - W3 Engineer forgot to add spec to drawing

12288 - TEST 2018 OCT RELEASE [Exit]

Status
8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D4 - Define and Verify Root Cause and Escape Point

Root Causes [Add a Root Cause]
Not specified.

Escape Points [Add an Escape Point]
Not specified.

D4 Attachments [Edit]
None.

D4 Assignments [Add an Assignment]
None.

D4 - Escape Point Detail

Escape Point Statement: (REQUIRED)
Give a one-line description of this Escape Point.

Escape Point Description:
If necessary, describe this Escape Point in detail.

Verification Description:
What was done to verify the accuracy of this Escape Point, and when?

Target date for verification: []
Date this Escape Point was successfully verified: []

[Save and Return] [Cancel]



D4 – Escape (verify)

- Describe what was done to verify cause actually contributed.
- Provide verification of cause and dates.
- Add any evidence in the [Attachment](#) section and add [Assignments](#) when possible

12288 - TEST 2018 OCT RELEASE

Status: 8D Status: Open as of 15-Oct-2018 by Hilda Flores [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D4 - Define and Verify Root Cause and Escape Point

Root Causes: Not specified. [Add a Root Cause]

Escape Points: Not specified. [Add an Escape Point]

D4 Attachments: None. [Edit]

D4 Assignments: None. [Add an Assignment]

D4 - Escape Point Detail

Escape Point Statement: (REQUIRED)
Give a one-line description of this Escape Point.

Escape Point Description:
If necessary, describe this Escape Point in detail.

Verification Description:
What was done to verify the accuracy of this Escape Point, and when?

Target date for verification: []

Date this Escape Point was successfully verified: []

[Save and Return] [Cancel]



D5 – Define Corrective Action

- Each corrective action is matched to a cause or escape.
 - If causes and escapes have not been created in D4 you won't be allowed to continue, and you can question why.

The screenshot displays the 8D software interface for a case titled "12288 - TEST 2018 OCT RELEASE". The main content area shows the "D5 - Define and Verify Permanent Corrective Actions" step. The "Permanent Corrective Actions (PCA)" section is currently empty, with the text "Not specified." and a button to "Add a Permanent Corrective Action ?". Below this is the "D5 Attachments" section, which is also empty, with the text "None." and an "Edit" button. A modal dialog box is open in the foreground, titled "Why can't I add a Permanent Corrective Action?". The message in the dialog reads: "A Root Cause or Escape Point must be entered at D4 before a Permanent Corrective Action can be added." A green arrow points from the "Add a Permanent Corrective Action ?" button to the dialog box. The sidebar on the left contains a navigation menu with options such as "General Information", "D0 - Symptom & Response", "D1 - Team", "D2 - Problem", "D3 - Containment", "D4 - Cause & Escape", "D5 - Define Correction", "D6 - Implement Correction", "D7 - Prevent Recurrence", "D8 - Recognition", "Attachments", "Assignments", "8D Log", "8D Detail Report [options]", and "Email Team".

Responding a Full 8D



- D5 – Define Corrective Action (Verification)
- Describe what was done or will be done to verify the action, along with the respective dates.
- On/Off tests are need to prove the action will eliminate respective cause and/or escape.

12288 - TEST 2018 OCT RELEASE

Status: 8D Status: Open as of 15-Oct-2018 by Hilda Flores [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D5 - Define and Verify Permanent Corrective Actions

Permanent Corrective Actions (PCA) [Add a Permanent Corrective Action]
Not specified.

D5 Attachments [Edit]
None.

D5 Assignments [Add an Assignment]
None.

D5/D6 - Permanent Corrective Action Detail

Define and Verify (D5)

Associated Root Causes/Escape Points: (REQUIRED - SELECT ONE OR MORE)
Which Root Cause(s) or Escape Point(s) is this Action intended to address?

Root Cause TBD
 Escape Point TBD

Action Statement: (REQUIRED)
Give a one-line description of this Action.

Action Description:
If necessary, describe this Action in detail.

Is this a Service Action? Yes No

Verification Description:
Before implementation, what was done to verify the effectiveness of this Action?

Target date for verification: [Date Picker]
Date this Action was successfully verified: [Date Picker]

Implement and Validate (D6)

Select for implementation at D6? Yes No

[Save and Return] [Cancel]



D6 – Implement Permanent Corrective Action

- Each corrective action created can be selected for implementation.
 - If corrective actions have not been created in D5 you won't be allowed to continue, and you can question why.

The screenshot displays the software interface for the 8D process, specifically for case 12288 - TEST 2018 OCT RELEASE. The interface is divided into several sections:

- Status:** Shows the 8D Status as 'Open' as of 15-Oct-2018 by Hilda Flores, and the D-Step Status as 'D2 not yet complete'. There are buttons for 'Change 8D Status' and 'Change D-Step Status'. The Next Target Date is 'Complete through D3 by 24-Oct-2018'.
- D6 - Implement and Validate Permanent Corrective Actions:** This section is highlighted with a green box. It contains a 'Permanent Corrective Actions (PCA)' field with a 'Select' button and a dropdown menu showing '1 Permanent Corrective Actions for Implementation'. Below this, it says 'Not specified'.
- D6 Attachments:** Shows 'None'.
- D6 Assignments:** Shows 'None'.
- D6 - Implement Correction:** A list of steps from D7 to D8 with counts: D7 - Prevent Recurrence (0), D8 - Recognition (0), Attachments (0), Assignments (0), 8D Log (7).
- 8D Detail Report [options] Email Team**

An error message dialog box is overlaid on the interface, titled 'Why can't I select Permanent Corrective Actions for Implementation?'. The message states: 'A Permanent Corrective Action must be entered at D5 before promoting to D6 for implementation and validation.' A green arrow points from the error message to the PCA selection area in the D6 section.

Responding a Full 8D



Implement Permanent Corrective Action

- Select which action identified in D5 you want to implement, then save.
- Now it is ready to be edited.

D6 - Select Permanent Corrective Actions for Implementation

Which Permanent Corrective Actions from D5 are expected to be implemented at D6?

Occurrence Cause Description	<input checked="" type="checkbox"/>
Escape Cause Description	<input type="checkbox"/>

Save and Return **Cancel**

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris.Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

D6 - Implement and Validate Permanent Corrective Actions
Permanent Corrective Actions (PCA) Not specified
Attachments None

D6 - Implement Correction
D6 Assignments None

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris.Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

D6 - Implement and Validate Permanent Corrective Actions
Permanent Corrective Actions (PCA) For Root Cause: TBD
Implemented Validated
Occurrence Cause Description No No
Attachments None

Responding a Full 8D



D6 – Implement Permanent Corrective Action (Define and Verify)

- The Corrective Actions Defined to be implemented will be listed.
 - Select which action you want to view or edit.
- Note it has same content as D5, but with additional implementation and validation inputs at the bottom.

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

D6 - Implement and Validate Permanent Corrective Actions

Permanent Corrective Actions (PCA)	Implemented	Validated
For Root Cause: TBD	No	No
Occurrence Cause Description		

Attachments
None.

D6 Assignments
None.

D5/D6 - Permanent Corrective Action Detail

Define and Verify (D5)

Associated Root Causes/Escape Points: (REQUIRED - SELECT ONE OR MORE)
Which Root Cause(s) or Escape Point(s) is this Action intended to address?

Root Cause TBD
 Escape Point TBD

Action Statement: (REQUIRED)
Give a one-line description of this Action.

Action Description:
If necessary, describe this Action in detail.

Is this a Service Action? Yes No

Verification Description:
Before implementation, what was done to verify the effectiveness of this Action and what were the results?

Target date for verification:
Date this Action was successfully verified:

Implement and Validate (D6)

Target date for implementation:
Date this Action was implemented:

Validation Description:
After implementation, what was done to validate the effectiveness of this Action and what were the results?

Target date for validation:
Date this Action was successfully validated:

Save and Return Delete Cancel

Responding a Full 8D



D6 – Implement Permanent Corrective Action (Implement and Validate)

- Provide target and actual implementation and validation dates.
- Describe the evidence that the corrective action was effective in eliminating the applicable root cause and/or escape point.
- Add any evidence in the [Attachment](#) section and add [Assignments](#) when possible

4518 - Carrier RCD Model A Box Label Barcode Wrong

Status
8D Status: Open as of 08-May-2015 by Chris Follis
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 15-May-2015
Complete through D5 by 15-May-2015

D6 - Implement and Validate Permanent Corrective Actions
Permanent Corrective Actions (PCA)
For Root Cause: TBD
Occurrence Cause Description

	Implemented	Validated
Occurrence Cause Description	No	No

Attachments
None.

D6 Assignments
None.

D5/D6 - Permanent Corrective Action Detail

Define and Verify (D5)
Associated Root Causes/Escape Points: (REQUIRED - SELECT ONE OR MORE)
Which Root Cause(s) or Escape Point(s) is this Action intended to address?
 Root Cause TBD
 Escape Point TBD

Action Statement: (REQUIRED)
Give a one-line description of this Action.
Occurrence Cause Description

Action Description:
If necessary, describe this Action in detail.

Is this a Service Action? Yes No

Verification Description:
Before implementation, what was done to verify the effectiveness of this Action and what were the results?

Target date for verification: []
Date this Action was successfully verified: []

Implement and Validate (D6)
Target date for implementation: []
Date this Action was implemented: []

Validation Description:
After implementation, what was done to validate the effectiveness of this Action and what were the results?

Target date for validation: []
Date this Action was successfully validated: []

Save and Return Delete Cancel



D7 – Preventive Reoccurrence (Within Team Control or Recommendations).

- Preventive Actions are focused on improving the systems that affected the Root Causes and focusing on they not to keep on happening.
- Two options available; Preventive Actions within team control and/or Recommendations outside team control.

12288 - TEST 2018 OCT RELEASE [Exit]

Status

8D Status: Open as of 15-Oct-2018 by [Hilda Flores](#) [Change 8D Status]

D-Step Status: D2 not yet complete [Change D-Step Status]

Next Target Date: Complete through D3 by 24-Oct-2018

D7 - Prevent Recurrence

Prevent Recurrence Actions (within the control of the team) [Add a Prevent Recurrence Action ?]

None specified.

Recommendations (outside the control of the team) [Add a Recommendation]

None specified.

D7 Attachments [Edit]

None.

D7 Assignments [Add an Assignment]

None.

8D Detail Report [options]
Email Team

General Information

D0 - Symptom & Response 0

D1 - Team 5

D2 - Problem 0

D3 - Containment 0

D4 - Cause & Escape 0

D5 - Define Correction 0

D6 - Implement Correction 0

D7 - Prevent Recurrence

D8 - Recognition 0

Attachments 0

Assignments 0

8D Log 7

Responding a Full 8D



- D7 – Preventive Reoccurrence (Action Description & Rationales).
- Describe the action further to explain rationale of how it will prevent the system to create a similar problem in the future.
- Provide target and actual dates.

12288 - TEST 2018 OCT RELEASE [Exit]

Status
8D Status: Open as of 15-Oct-2018 by Hilda Flores [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D7 - Prevent Recurrence
Prevent Recurrence Actions (within the control of the team) [Add a Prevent Recurrence Action ?]
Not specified.

Recommendations (outside the control of the team) [Add a Recommendation]
Not specified.

D7 Attachments [Edit]
None.

D7 Assignments [Add an Assignment]
None.

8D Detail Report [options]
Email Team

D7 - Prevent Recurrence Action Detail

Associated Root Causes/Escapes: (REQUIRED - SELECT ONE OR MORE)
Which Root Cause(s) or Escape Point(s) is this Action intended to address?

Root Cause: TBD [X]
Escape Point: TBD [X]

Action Statement: (REQUIRED)
Give a one-line description of this Action.

Action Description:
If necessary, describe this Action in detail.

Rationale:
If necessary, describe why this Action is expected to successfully prevent the D2 F

Target date for implementation: [] [Calendar]
Date this Action was implemented: [] [Calendar]

[Save and Return] [Cancel]



- D7 – Preventive Reoccurrence (Recommendation Detail)
- If a recommendation that is outside of the 8D Team’s control needs to be documented, then do so here using the **Action What Who?** format.
- Add any evidence in the Attachment section and add Assignments when possible

12288 - TEST 2018 OCT RELEASE [Exit]

Status
8D Status: Open as of 15-Oct-2018 by Hilda Flores [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D7 - Prevent Recurrence
Prevent Recurrence Actions (within the control of the team) [Add a Prevent Recurrence Action ?]
Not specified.

Recommendations (outside the control of the team) [Add a Recommendation]
Not specified.

D7 Attachments [Edit]
None.

D7 Assignments [Add an Assignment]
None.

D7 - Recommendation Detail

Recommendation Statement: (REQUIRED)
Give a one-line description of this Recommendation.

Recommendation Description:
If necessary, describe this Recommendation in detail. Be sure to

[Save and Return] [Cancel]



- D8 – Recognition
- Thank the team and highlight any key contributors or supporters !
- Add any evidence in the [Attachment](#) section and add [Assignments](#) when possible

12288 - TEST 2018 OCT RELEASE [Exit]

Status
8D Status: Open as of 15-Oct-2018 by Hilda Flores [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 24-Oct-2018

D8 - Recognize Team and Individual Contributions
Recognition: Not specified. [Add a Recognition Entry]
D8 Attachments: None. [Edit]
D8 Assignments: None. [Add an Assignment]

General Information
D0 - Symptom & Response 0
D1 - Team 5
D2 - Problem 0
D3 - Containment 0
D4 - Cause & Escape 0
D5 - Define Correction 0
D6 - Implement Correction 0
D7 - Prevent Recurrence 0
D8 - Recognition 0
Attachments 0
Assignments 0
8D Log 7

8D Detail Report [options]
Email Team

D8 - Recognition Detail

Entered by: Chris Follis
Date: 11-May-2015 [Calendar Icon]
Recognition Description: (REQUIRED)
[Large Green Placeholder Box]
[Save and Return] [Cancel]

Reviewing an 8D



- Reviewing Highlights
- Reviewers are typically:
 - Quality Directors for Customer, Other 8D
 - Quality Managers for Supplier 8D
 - Additional ones for each site can be setup by Administrators
- Reviewer email notifications can be turned on or off under My Settings / My Snapshot Email.
 - Settings can be set for Step ranges or Overall 8D
- Reviewing is independent of the 8D status, meaning teams can close an 8D even if it has not been reviewed. 8Ds pending review have asterisks.
- It is recommended to use the:
 - [8D Detailed Report](#)

Hello, Hilda Flores. [Sign Out](#)
Help Desk: (989) 835-5252 or support@global8d.com

Main Menu All My 8Ds Search for 8Ds

Tools

- Administration Menu
- Create a New 8D
- 8D Number: [View](#)
- My Settings**
- Regal Templates and Reference Material
- My PrismPort .net Account
- Hidden Broadcast Messages (0)

My 8Ds: Pending My Review (D4-Overall 8D)
Limited to the 5 8Ds that have been awaiting your D4-Overall 8D review the

8D #	Title
5783	52B213311CFP2- Not accepted gage Go of KeyWay Shaft
6939	Fan Broken
7160	Broken Terminal Board
6509	52B211218P1 - Housing broken

My 8Ds: Where I'm on the Team
Limited to the 10 most recently updated 8Ds where you are on the team. View

8D #	Title
7274	RBC McAllen Lamination Center - Rotor Core - High Resistance
6570	Defective Insulation S4022-015-2.840 (Essex)
7559	Surface of frame rough. Screen holes O/S red tan# 504955

My Snapshot Email

On *This allows you to request and configure a regularly scheduled email which can notify you of things like: 8D changes, Status changes, being added to Teams, upcoming Target Dates, etc.*

Off

Tell me about the following 8D activity:

- My addition to or removal from 8D Teams.
- Changes to 8Ds where I'm on the Team:
 - All changes.
 - Only Status changes.

Alert me to the following:

- Open 8Ds where I'm on the Team that have an unmet Target Date that is past due or less than days away.
- Open 8Ds where I'm on the Team that haven't been updated within the past days.
- 8Ds where there is something for me to review between and

Send the email every:*

Mon Tue Wed Thu Fri Sa

: am time zone: [UTC-06:00] US/Moun

If there is nothing to report on a selected day:
 Send an email to let me know.
 Do not send an email.

*Activity that occurs on unselected days will be included on the next selected day.

[Save and Return](#) [Cancel](#)

Reviewing an 8D



- Reviewer Responsibilities
 - Reviewer actions display on Main Page, which may apply to an 8D Step or overall 8D.
 - Select 8D to review
 - The recommended process to review the complete document is using the [8D Detailed Report](#) and reviewing the nested 8Ds.
 - Select Enter Review Results.
 - Approve or deny, then add comments as desired.

My 8Ds: Pending My Review (D4-Overall 8D)

8D #	Title	Pending Review of	Time Pending
5783	52B213311CFP2- Not accepted gage Go of KeyWay Shaft	Overall 8D	215 days 21 hours
6932	Fan Broken	D4-D8	78 days 22 hours
7160	Broken Terminal Board	D5	48 days 22 hours
8502	52B211216P1 - Housing broken	D3-D8, Overall 8D	27 days 1 hour

My 8Ds: Where I'm on the Team

8D #	Title	8D Status	Complete through
7274	RBC McAllen Lamination Center - Rotor Core - High Resistance	Open	D2 *
6570	Defective Insulation S4022-015-2-B40 (Essex)	Completed *	D6 *
7160	Surface of frame rough. Repair below CR...	Open (D4-D8)	D6 *

My 8Ds: Pending My Review (D4-Overall 8D)

8D #	Title	Pending Review of	Time Pending
5783	52B213311CFP2- Not accepted gage Go of KeyWay Shaft	Overall 8D	215 days 21 hours
6932	Fan Broken	D4-D8	78 days 22 hours
7160	Broken Terminal Board	D5	48 days 22 hours
8502	52B211216P1 - Housing broken	D3-D8, Overall 8D	27 days 1 hour

Enter Review Results

D2-D3 previously approved. See the 8D Log for details.

	Approve Completion	Deny Completion (and reopen)	Do nothing for now
D4	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
D5	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
D6	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
D7	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
D8	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Overall 8D: Not yet completed

Comments: These will be included in the Log Entry for this action and cannot be edited once saved.

5783 - 52B213311CFP2- Not accepted gage Go of KeyWay Shaft

Status: 8D Status: Completed (pending review) as of 06-Oct-2016 by Armando Martinez

Target Dates: 6 D-Step Status: Complete through D8 as of 07-Jun-2016 by Hector Bustos

General Information

8D Title: 52B213311CFP2: Not accepted gage Go of KeyWay Shaft

Last Updated: 06-Oct-2016 by Armando Martinez

Opened: 16-Apr-2016 by Armando Martinez

8D Type: Supplier

Log By: CASH - Jurgens, MX - JCSH

Updating Status a Full 8D



- Status Changes
- Overall 8D and/or D-Steps can have status changed with notes.
- If marked complete it may prevent editing until its reopened.

The screenshot displays the 8D process interface for a problem titled "4518 - Carrier RCD Model A Box Label Barcode Wrong". The main window shows the current status as "Open" and the D-Step Status as "D2 not yet complete". Two buttons, "Change 8D Status" and "Change D-Step Status", are highlighted with a green box. Two green arrows point from these buttons to two separate "Change 8D Status" dialog boxes below. The left dialog box shows the "Current 8D Status" as "Open" and the "New 8D Status" as a dropdown menu. The right dialog box shows the "New 8D Status" dropdown menu open, with options: "On Hold", "Cancelled", and "Completed (pending review)". Both dialog boxes include a "Comments" field and checkboxes for "Display the Log Entry for this action on the 8D Detail Report" and "After saving, help me compose an email to the Team and/or others".



Creating a New 8D D0-Only

Creating a D0-Only 8D



Main Menu Screen Select 8D Form: D0-Only or Full 8D

D0 - Only	Team Initiating the 8D	Team Responsible to provide solution
General Information	X	x
D0 Information	X	x
Team	X	x
Attachments	X	X
Assignments	X	X
Emails	X	X
Status	X	
Review	X	

When beginning an 8D, you have two options:

Option 1: Create a D0-only 8D (D-Zero-only 8D)

This option allows documentation of:

- The initial issue that prompted the request for an 8D.
- Action taken in response to this issue.
- The cause of the issue, if known.

This option allows generation of a simple report, which can be used to provide rapid feedback on the issue.

A D0-only 8D can be expanded to a Full 8D at any time if necessary, or it can be marked complete as a D0-only 8D if appropriate.

Additional Regal Guidelines

Do not use a D0-only 8D if:

- Containment Action is required.
- Customer will ask for Corrective Action.
- Supplier is part of the Under Performer or has several incidents reported.

Every D0-only 8D is required to include an assignment to review the effectiveness of the Corrective Action taken.

Leaders will be responsible for:

- Identifying the person to review the action (who has it been assigned to).
- Identifying the method to determine if the Corrective Action is effective.
- Reviewing the evidence and determining if it indicates the Corrective Action was effective before closure.

Create a D0-only 8D

Option 2: Create a Full 8D

Use this option if you already know that a Full 8D is appropriate. This option does not provide the ability to generate a D0-only 8D report, although D0 information can still be documented in the context of the Full 8D.

Create a Full 8D

Cancel

- Recommend Full 8D since D0-only 8Ds are not a short form 8D and only capture the initial complaint and response.

Fill in the General Information section

[General Information – Any 8D](#)



Target Dates

- D0-Only 8D Type Customer:
 - After the 8D is initiated, it will specify the “Next Target Date” which by default is 1 month after the D0-Only 8D was opened. This Date is not editable.

This is a D0-only 8D.

8D Status: Open as of 24-Nov-2017 by Alankar Sahu

Next Target Date: 8D complete by 24-Dec-2017 [?] [Edit]

Status	Target Dates
8D Status: Completed	Target: 24-Dec-2017 [?] 28 days away

- D0-Only 8D Type Supplier & Other
 - The Next Target Date can be edited

Status Target Dates [Edit]

Target Dates: None.

Target Date

This applies to completion of the D0-only 8D. If this 8D is expanded to a Full 8D, a new completion target can be specified at that time.

8D Status: Completed by: [] []

Comments: (REQUIRED - PLEASE EXPLAIN WHY YOU ARE EDITING THE TARGET DATE)
These will be included in the Log Entry for this action and cannot be edited once saved.

Display the Log Entry for this action on the 8D Detail Report.
 After saving, help me compose an email to the Team and/or others.

Save and Return | Cancel

Note: it is recommendable to work with the team to define the date and update it accordingly so no unnecessary emails are sent to your inboxes.



D0 Information (Issue Description)

Describe the issue answering the following questions: **Who?** / **What?** / **When?** / **Where?** / **Why?** / **How?** / How many?

Provide detail like; customer impact, assembly problems & downtime.

Examples:

1. **Customer** rejected **Model A** on **3/25/15** during production for **excessive noise** using human ear as gauge. (5 line rejects, causing 2 pallets of 120 to be held) Line was down for 3 hours.
2. **Plant** rejected **Part B** on **3/25/15** at receiving for **oversized OD** using calipers. (3 rejected samples, causing entire lot of 300 to be rejected)

D0 Information

Issue Description:
Describe the issue that requires attention.

Transfers to D0 Symptom if expanded to Full 8D.

Action Description:
Describe the action that was taken to address the issue.

Date this Action was implemented:

Cause Description:
If known, describe the cause of this issue.



D0 Information (Action Description and Date)

All parties involved describe emergency response actions taken to address issue. Focus is towards containment and getting good parts to customer. Regal and Suppliers to complete.

Examples:

The “Who?” is really critical due this space is to be filled by Regal and external from Regal

1. Who stopped production
2. Who stopped shipment
3. Who quarantined inventory
4. Who sorted inventory
5. Who posted alert
6. Who returned inventory
7. Who certified inventory

D0 Information
Issue Description:
Describe the issue that requires attention.

Action Description:
Describe the action that was taken to address the issue.

Transfers to D0 Emergency Response if expanded to Full 8D.

Date this Action was implemented:
Cause Description:
If known, describe the cause of this issue.



D0 Information (Cause Description)

- If this D0-only 8D is likely to expand into a Full 8D, you can enter one Cause within this D0-only 8D. That Cause is the Occurrence one and not the Escape one.
- If you enter more than one cause, it will have to be split out if expanded to a Full 8D.
- If expanded, content is moved to the D4 Cause and not the D4 Escape.

Examples:

1. Occurrence: Inserter tooling worn and damaged causing scratched wire. (Machine)

D0 Information

Issue Description:
Describe the issue that requires attention.

Action Description:
Describe the action that was taken to address the issue.

Date this Action was implemented:

Cause Description:
If known, describe the cause of this issue.

Transfers to D4 Cause if expanded to Full 8D.



Assigning Actions (**Effectiveness**)

> Every D0-only 8D is **required** to include an Assignment to review the effectiveness of the corrective action taken

- Leaders will be responsible for:
 - Identifying the person to review the action. (Who has it been assigned to,)
 - Identifying the method to determine the corrective action is effective (See next slide for examples)
 - Reviewing the evidence entered and determine it indicates the corrective action was effective before closure.

The screenshot displays a software interface for creating a D0-only 8D. The title bar reads "9021 - TEST D0" with an "Exit" button. The main content area is divided into sections: "Status" (with a note "This is a D0-only 8D." and "8D Status: Open as of 08-Nov-2017 by Glenn Nastachowski"), "Assignments" (with a note "None." and an "Add an Assignme" button), and "8D Log". The sidebar on the left contains navigation options: "General & D0 Information", "Team", "Assignments" (highlighted with a green box), "8D Log", "8D Detail Report [options]", and "Email Team". A green arrow points from the "Assignments" link in the sidebar to the "Add an Assignme" button in the main content area.



Assignment samples – How to review effectiveness

- **Periodic checks.** This method involves scheduling a time to re-inspect or review product from the process that had the corrective action performed on it. For example, if there was a corrective action implemented to improve an inspection process to detect a type of defect, the activity can be observed and the product inspected to determine the success of the action.
- **Sampling.** Sampling can be used for observations of variables or attributes, per defined sampling plan. An example is, performing a statistical sample drawn from a production lot to confirm that a defect has been removed or significantly reduced after implementing a process improvement.
- **Test Trials.** This method involves setting up the process or activity using the corrective action and producing similar or a sample of parts that can be evaluated to determine the results expected has occurred.
- **Trend analysis** Trend analysis can be used by reviewing data from the process or activity to verify that expected results were achieved. Examples of trend analysis is the review of control charting, process monitoring data or other types of data generated from the monitoring of the process for a period of time after the action had been implemented.
- **Auditing.** Can be used when the corrective action involves changes to a procedure, method or process. The audit is done to see whether the changes are in place procedurally and in use by the personnel performing the activity.
- **Spot check.** Can be used for observations of performance or reviews of records. Spot checks provide immediate but limited feedback. An example is, a spot-check of records to ensure that the step that was previously not being performed and its results recorded is now being completed

Expand D0 Only to Full 8D



D0-only 8D Screen

- Note: Expanding to Full 8D is **irreversible**
- Select Expand to Full 8D and update screen as desired.

4561 - Carrier RCD Model A Box Label Barcode Wrong [Exit]

Status: *This is a D0-only 8D.* [Expand to Full 8D] [Change 8D Status]

General Information and D0 Information

8D Title: Carrier RCD Model A Box Label Barcode Wrong [Edit]

Last Updated: 15-May-2015 by Chris Follis

Opened: 15-May-2015 by Chris Follis

8D Type: Customer

Lead Plant: IGMEX #6, Juarez, MX

Issue Type: Product Quality

Customer 8D Information [Edit]

Customer: Carrier - East Syracuse,

Corrective Action Number: *Not specified.*

Major Customer Escape? No

Component/Defect: Label (Box) - Barcode - Wrong

Models/Parts:

Regal Model Number	Customer Part Number	Number of Parts Rejected	Date Code / Serial Number
ABC	<i>Not specified.</i>	10	<i>Not specified.</i>

Customer Material Return Information [Edit]

This issue does not require material to be returned by the customer.

Expand to Full 8D

⚠ Expanding to a Full 8D is an irreversible process.

Comments:
These will be included in the Log Entry for this action and cannot

Display the Log Entry for this action on the 8D Detail Report.

After expanding, help me compose an email to the Team and/

You may optionally enter Target Dates for the Full 8D.

D-Step Status: Complete through D3 by: [] [] []

D-Step Status: Complete through D5 by: [] [] []

8D Status: Completed by: [] [] []

[Expand to Full 8D] [Cancel]

Updating D0-Only 8D Status



D0-only 8D Screen

- Overall 8D can have status changed with notes.
- Leaders typically change the 8D overall status.
 - Only can be done by a Full access member (Regal)

4561 - Carrier RCD Model A Box Label Barcode Wrong [Exit]

Status: *This is a D0-only 8D.* [Expand to Full 8D] [Change 8D Status]

8D Status: Open as of 15-May-2015 by Chris Follis

General Information and D0 Information

8D Title: Carrier RCD Model A Box Label Barcode Wrong [Edit]

Last Updated: 15-May-2015 by [Chris Follis](#)

Opened: 15-May-2015 by [Chris Follis](#)

8D Type: Customer

Lead Plant: IGMEX #6, Juarez, MX

Issue Type: Product Quality

Customer 8D Information

 [Edit]

Customer: Carrier - East Syracuse,

Corrective Action Number: *Not specified.*

Major Customer Escape? No

Component/Defect: Label (Box) - Barcode - Wrong

Models/Parts:

Regal Model Number	Customer Part Number	Number of Parts Rejected	Date Code / Serial Number
ABC	<i>Not specified.</i>	10	<i>Not specified.</i>

Customer Material Return Information

 [Edit]

This issue does not require material to be returned by the customer.

Change 8D Status

Current 8D Status: Open

New 8D Status:

Comments: *These will be included in the 8D Detail Report and cannot be edited.*

Display the Log Entry for this action on the 8D Detail Report.

After saving, help me compose an email to the Team and/or others.

[Save and Return] [Cancel]

Date Entry Formats



8D Title: Customer/Supplier Site Regal Model/Part Component/Part Name Feature/Characteristic Nonconformance (Other)

1. Pentair Delavan Model A Shaft Length Oversized
2. Carrier RCD Box Label Barcode Wrong (SCAR 1234)
3. JCI Wichita Model B Bearing Failure (Field Return)
4. Trane Pueblo Various Models Winding Shorted

Issue Detail: Item/Subject Feature/Characteristic/Activity Nonconformance

1. Motor Condition Damaged
2. Motor Performance (Noise) Excessive
3. Order Quantity Inadequate
4. Shipment Delivery Late
5. Label (Pallet) Barcode Wrong
6. Shaft Keyway Width Undersized

Problem Statement: Regal Model/Part Component/Part Name Feature/Characteristic Nonconformance (Other)

1. Model A Shaft Length Oversized
2. Box Label Barcode Wrong (SCAR 1234)
3. Model B Bearing Failure (Field Return)

Problem Description: Who What When Where Why How (How Many)

1. Customer rejected Model A on 3/25/15 during production for excessive noise using human ear as gauge. (5 line rejects, causing 2 pallets of 120 to be held)
2. Plant rejected Part B on 3/25/15 at receiving for oversized OD using calipers. (3 rejected samples, causing entire lot of 300 to be rejected)

Containment Statement: Action What Where

1. Reinspect inventory at warehouse
2. Reinspect inventory at mfg plant
3. Review drawing / specification

Containment Description: Action What How

1. 100% sort and return to plant using calipers.
2. 100% repair onsite using attached JIB.
3. 100% top layer audit pallets visually and 100% inspect end frames with go/nogo gauge

Containment Validation: How Many What Action

1. 500 pumps and 100 motors sorted
2. 50 pumps repaired and 50 motors returned.
3. 40 motors repaired and 10 scrapped

Cause & Escape Statement: Who/What Why (5Ms)

1. Inserter tooling worn and damaged (Machine)
2. Micrometer out of calibration (Machine)
3. Tester meter malfunctioned (Machine)
4. Operator forgot to inspect part (Man)
5. Engineer forgot to add spec to drawing (Man)

Cause & Escape Description: Why# Who/What Why

- W1 Engineer entered wrong spec on drawing
W2 Sales rep provided outdated customer file
W3 Customer did not forward updated file
W1 JIB did not require inspection
W2 QE did not add requirement to control plan
W3 Engineer forgot to add spec to drawing

Corrective Action Statement: Action What/Who

1. Repaired ... fixture
2. Added ... PM
3. Corrected ... drawing
4. Corrected ... JIB
5. Retrained engineer ...
6. Replaced operator ...



- General PRISM software questions
 - Help Desk: (989) 835-5252 or support@global8d.com
 - Also located in the upper left corner of the PRISM screen.
- Customer, Other & Supplier-Internal 8D specific questions, contact the Leader(s) and/or the respective QM (Plant Quality Manager) or QD (Business Quality Director).
- NPD 8D For any other questions:
 - Blane.Baumgartner@Regalbeloit.com
- Supplier-External 8D specific questions about the opportunity reported, contact the Leader(s) and/or the respective SDE (Supplier Development Engineer). For any other questions:
 - Joven.Kionisala@Regalbeloit.com
 - Riza.Puentespina@Regalbeloit.com





KEY recommendations

Full 8D



14746 - Customer Name- Short statement that describes the failure Edit

Status

Target Dates

Status Target Dates	Target
D-Step Status: Complete through D3	29-Jun-2019 76 days ago
D-Step Status: Complete through D5	03-Jul-2019 72 days ago
8D Status: Completed	28-Jul-2019 47 days ago

Other Target Dates
None.

D0 - Prepare for the G8D Process

Symptoms
Not specified.

Emergency Response Actions (ERA) Add an Emergency Response Action
Not specified.

D0 Attachments
None.

D0 Assignments Add an Assignment
None.

General Information

D0 - Symptom & Response

- D1 - Team 4
- D2 - Problem 1
- D3 - Containment 1
- D4 - Cause & Escape 2
- D5 - Define Correction 1
- D6 - Implement Correction 1
- D7 - Prevent Recurrence 3
- D8 - Recognition 1

Attachments 0
Assignments 0
8D Log 7

8D Detail Report [options]
Email Team

Field to describe this Symptom in detail. What is the first impression detected.

Field to describe what is the First Action to contain the opportunity where it was identified





Each target date should be defined based on attainability. (Example: Oversea suppliers move D3 up to 48 hours, D5 up to 2 weeks if samples requested, etc.).

Team members (except oversight) will receive notifications if not completed as requested.

Responder to the Corrective Action can negotiate dates back with 8D Leader, 8D Leader should update dates accordingly.

Target Dates

D-Step Status: Complete through D3 by: 21-Jun-2019 

D-Step Status: Complete through D5 by: 25-Jun-2019 

8D Status: Completed by: 20-Jul-2019 





D2 - Describe the Problem

Problem Statement: (REQUIRED)

What is wrong with what?

Problem Description:

What? When? Where? How Big?

Save and Return

Delete

Cancel

Problem Statement: Problem statement using a format "Regal model/part, component/part name, feature, defect". Ex. Box Label Barcode Wrong

Problem Description:

What would "the team who detected the opportunity" know?
When were the defective parts manufactured?
What is the Serial number? (if available)

When were they assembled?

When were the components/assemblies shipped to the customer?
When shipped from the warehouse?

Detection:

How was the responsible of the defect made aware of the issue?
Who provided the information?

Failure Mode:

How does the issue manifest itself?

Impact on user of the defective component/assembly:

Identify the potential for shut down, line interruptions, product recalls, warranty. etc.

Facilities Involved:

RBC and any Customers

Evidence to be attached on attachment section

Specific assignments, action owner & due date to be listed on assignments section



15446 - Supplier: Hierro Gris □ P/N: 525520 □ Issue: Porosity

Status 8D Status: Open as of 13-Sep-2019 by Kyle Krahenbuhl
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 14-Sep-2019

D3 - Develop Interim Containment Actions

Interim Containment Actions (ICA)
Not specified.

D3 Attachments
None.

D3 Assignments
None.

Target Dates 3

General Information
D0 - Symptom & Response 0
D1 - Team 11
D2 - Problem 1

D3 - Containment
D4 - Cause & Escape 0
D5 - Define Correction 0
D6 - Implement Correction 0
D7 - Prevent Recurrence 0
D8 - Recognition 0
Attachments 1
Assignments 0
8D Log 8

8D Detail Report [options]
Email Team

Fill to describe what is done for the opportunity to be contained meanwhile the corrective actions take place.

Minimum one Interim Containment Action needs to be documented.

Add as many Interim Containment Actions as needed, consider one per site where material might be located.

- Each inventory location requires its own entry because criteria may differ.
- Special documentation reviews or onsite services have their own entry also.



D3 - Interim Containment Action Detail

Action Statement: (REQUIRED)

Give a one-line description of this Action.

Sorting

Action Description:

If necessary, describe this Action in detail.

Verification Description:

Before implementation, what was done to verify the effectiveness of this Action and what were the results?

Target date for verification:

22-May-2019

Date this Action was successfully verified:

22-May-2019

Target date for implementation:

22-May-2019

Date this Action was implemented:

22-May-2019

Validation Description:

After implementation, what was done to validate the effectiveness of this Action and what were the results?

Sorting at our Customer (Jakel) must continue due to the hub supplier is not capable of consistently producing hubs that are within print requirements.

State containment action using "Who, Action, What, Where" format.

Examples:

- Supplier Reinspect inventory at warehouse
- Regal Reinspect inventory at manufacturing plant
- Customer Review drawing / specification

Description of how the action is going to be executed to immediately protect the customer and contain any suspect inventory: These actions are temporary for an interim period of time.

- a) Inspection Criteria
- b) Describe suspect material: model, qty, inventory location, date codes / serial numbers.
- c) Describe how the certified material is going to be identified: Color, size, location, and content of label or hand-written identification on each part and/or container of certified material.

Actions for each Product/Platform at Risk: Other RBC lines/Supplier sites, in transit, plants or Customers who may be impacted by this issue would be on the assignments section (Each inventory location requires its own entry because criteria may differ & Special documentation reviews or onsite services have their own entry also)

Description of what was or will be done to verify effectiveness, then provide target dates

1. Compared inspection criteria with customer
2. Verified GRR was acceptable before use
3. Attach all evidence possible

Description of what was done to validate effectiveness, by summarizing:

- a) Sorting Results: Time, date, total number sorted and quantity rejected - broken down by facility
 - b) Total quantity sorted at all facilities & Total quantity of defects found at all facilities
- Customer Inventory Examples: 500 pumps and 100 motors sorted
Regal/Supplier Inventory Examples: 300 motors and 50 end frames sorted



14746 - Customer Name – Short statement that describes the failure

Status

8D Status: Open as of 28-Jun-2019 by Elizabeth Espanola

D-Step Status: D2 not yet complete

Next Target Date: Complete through D3 by 29-Jun-2019 ⚠️ 59 days ago

D4 - Define and Verify Root Cause and Escape Point

Root Causes

Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged

Escape Points

Escape cause statement using a "what/who, action/condition" format. Ex. Micrometer out of calibration

D4 Attachments

None.

D4 Assignments

None.

Root cause statement using a "What/Who, Action / Condition" format. Ex. Inserter tooling worn and damaged

Based on: Description of causation root cause (1st Leg of 3Leg-5Why analysis) Variation: What are opportunities for variation in the process, Examples:

- Inserter tooling worn and damaged (Machine)
- Operator forgot to install screw (Man)
- Engineer entered wrong spec on drawing (Man)

Add "Root Cause" as many as needed, at least one per Problem

Escape cause statement using a "what/who, action/condition" format. Ex. Micrometer out of calibration

BASED ON: Description of detection root cause (2nd Leg of 3 Leg 5why analysis). Why product was shipped & How Verified

Add "Escape Points" as many as needed. At least one per Root Cause (when reviewed in the "8D Detailed Report is nested inside its Root Cause)

D4 - Define and Verify Root Cause



D4 - Root Cause Detail

Root Cause Statement: (REQUIRED)
Give a one-line description of this Root Cause.

Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged

Root Cause Description:
If necessary, describe this Root Cause in detail.

Description of causation root cause (1st Leg of 3 Leg-5Why analysis)

Variation: What are opportunities for variation in the process, i.e. how many fixtures do the same process? How many weld cells or robots? Etc.

Evidence would be on attachment section, include 5why's, fish bone and any other analysis tool used.

Verification Description:
What was done to verify that this Root Cause actually contributed to the D2 Problem, and what were the results?

Description of what was done to verify cause actually contributed:

- a) Has it been turned on and off? How?
- b) Verify through statistical evidence/hypothesis testing.
- c) If not verified by turning on/off, identify as a suspected root cause.
- d) percent contribution of problem.

Evidence would be on attachment section.

Specific assignments, action owner & due date to be listed on assignments section

Target date for verification:

Date this Root Cause was successfully verified:

Percent Contribution:
What percent of the D2 Problem is attributed to this Root Cause? %

If more than one cause detected, update the percent of contribution accordingly.

If percentage of contribution is <100%
Proceed to "Add a root cause" until the add up of % is 100

Associated Escape Points:
To which Escape Point(s) is this Root Cause associated?

- Escape cause statement using a "what/who, action/condition" format. Ex. Micrometer out of calibration

When the 8D Type Supplier-External
Question yourself if the #1 contribution root cause supplier responsibility? Yes/no

If No: Explain (open field)

D4 - Define and Verify Escape Point



D4 - Escape Point Detail

Escape Point Statement: (REQUIRED)
Give a one-line description of this Escape Point.

Escape cause statement using a "what/who, action/condition" format. Ex. Micrometer out of calibration

Escape Point Description:
If necessary, describe this Escape Point in detail.

Description of detection root cause (2nd Leg of 3 Leg 5why analysis).

Why product was shipped & How Verified

Evidence would be on attachment section, include 5why's, fish bone and any other analysis tool used.

Verification Description:
What was done to verify the accuracy of this Escape Point, and what were the results?

Description of what was done to verify cause actually contributed
a) Has it been turned on and off? How?
b) Verify through statistical evidence/hypothesis testing.
c) If not verified by turning on/off, identify as a suspected root cause.

Evidence would be on attachment section.

Specific assignments, action owner & due date to be listed on assignments section

Target date for verification:

Date this Escape Point was successfully verified:

Associated Root Causes:
To which Root Cause(s) is this Escape Point associated?

- Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged

Save and Return Delete Cancel



Regal Global 8D: 8D #14746 - Google Chrome
global8d.com/cgi-bin/regalbeloit/owa.cgi/frm8DDetail.Body?psG8DID=14746&psTopDisplay=S&psDisplay=8&psX=20190910175238

14746 - Customer Name – Short statement that describes the failure Exit

Status 8D Status: Open as of 28-Jun-2019 by Elizabeth Esparza Change 8D Status
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 29-Jun-2019 ⚠️ 73 days ago

D5 - Define and Verify Permanent Corrective Actions

Permanent Corrective Actions (PCA) Add

For Root Cause: Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged

Vermed		
Action Statement using an "Action, What, Who" format. Example: Update Preventive Maintenance Engineering	No	View/Edit

D5 Attachments Edit
None.

D5 Assignments Add an Assignment
None.

D5 - Define Correction

- D6 - Implement Correction 1
- D7 - Prevent Recurrence 3
- D8 - Recognition 1

Attachments 0
Assignments 0
8D Log 7

8D Detail Report [options]
Email Team

Action Statement using an "Action, What, Who" format. Example: Update Preventive Maintenance Engineering

Add "Permanent Corrective Actions" as many as needed, at least one per each Root Cause (there should always be at least 2 Root Causes, 1 for why it happened, and 1 for why it escaped)



D5/D6 - Permanent Corrective Action Detail

Define and Verify (D5)

Root Causes/Escapes Points: (REQUIRED - SELECT ONE OR MORE)
Which Root Cause(s) or Escape Point(s) is this Action intended to address?

- Root Cause Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged
- Escape Point Escape cause statement using a "what/who, action/condition" format. Ex. Micrometer out of calibration

Action Statement: (REQUIRED)
Give a one-line description of this Action.

Action Description:
If necessary, describe this Action in detail.

Verification Description:
Before implementation, what was done to verify the effectiveness of this Action and what were the results?

Target date for verification:

Date this Action was successfully verified:

Implement and Validate (D6)

Select for implementation at D6? Yes No

Action Statement using an "Action, What, Who" format.
Example: Update Preventive Maintenance Engineering

- 1) Explanation of the impact the action has on one or many of the whys in a 5Why analysis.
 - 2) Build Date for Certified Material: "Clean point" at which all material is certified as good.
 - 3) How Will New Parts Be Identified? Color, size, location, and content of label or hand-written identification on each part and/or container of certified material.
- Assignment section would have specific activities of each team member
- 1) Assignment Description
 - 2) Assignment Action Owner Name
 - 3) Assignment target dates

Evidence would be on attachment section

- 1) Has the issue been turned on and off? How?
- 2) Verification through statically evidence / hypothesis testing.

Evidence would be on attachment section

Specific assignments, action owner & due date to be listed on assignments section

If Yes: once the information is filled in D6 it will appear here as well after saved.
If No: once the information is filled in D6 it won't appear here after saved.



Regal Global 8D: 8D #14746 - Google Chrome
global8d.com/cgi-bin/regalbeloit/owa.cgi/frm8DDetail.Body?psG8DID=14746&psTopDisplay=S&psDisplay=8&psX=20190910175238

14746 - Customer Name– Short statement that describes the failure [Exit]

Status
8D Status: Open as of 28-Jun-2019 by [Elizabeth Esparza](#) [Change 8D Status]
D-Step Status: D2 not yet complete [Change D-Step Status]
Next Target Date: Complete through D3 by 29-Jun-2019 ⚠️ 73 days ago

D5 - Define and Verify Permanent Corrective Actions
Permanent Corrective Actions (PCA) [Add a Permanent Corrective Action]

For Root Cause: Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged	Verified
Action Statement using an "Action, What, Who" format. Example: Update Preventive Maintenance Engineering	No [View/Edit]

D5 - Define Correction

D5 Attachments
None.

D5 Assignments
None.

8D Detail Report [options]
Email Team

Action Statement using an "Action, What, Who" format. Example: Update Preventive Maintenance Engineering

Add "Permanent Corrective Actions" as many as needed, at least one per each Root Cause (there should always be at least 2 Root Causes, 1 for why it happened, and 1 for why it escaped)



14746 - Customer Name- Short statement that describes the failure

Status 8D Status: Open as of 28-Jun-2019 by Elizabeth Esparza

Target Dates D-Step Status: D2 not yet complete

Next Target Date: Complete through D3 by 29-Jun-2019 ⚠️ 75 days ago

D7 - Prevent Recurrence

Prevent Recurrence Actions (within the control of the team)

For Root Cause: Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged	Implemented
Action Statement using an "Action, What, Who" format. Example: Update training program for Employees	No
For Escape Point: Escape cause statement using a "what/who, action/condition" format. Ex. Micrometer out of calibration	Implemented
Action Statement using an "Action, What, Who" format. Example: Update Control plan for Electrical Test	No

Recommendations (outside the control of the team)

Action outside the 8D teams control using the "Action, What, Who" Format

D7 Attachments

None.

D7 Assignments

None.

Preventive Actions are focused on improving the systems that affected the Root Causes and focusing on they not to keep on happening.
Two options available; Preventive Actions within team control and/or Recommendations outside team control.

Action Statement using an "Action, What, Who" format. Example: Update Preventive Maintenance Engineering

Add "Prevent Recurrence Actions" as many as needed, at least one per each Root Cause (there should always be at least 2 Root Causes, 1 for why it happened, and 1 for why it escaped)

Action Statement using an "Action, What, Who" format. Example: Update Preventive Maintenance Engineering



D7 - Prevent Recurrence Action Detail

Root Causes/Escape Points: (REQUIRED - SELECT ONE OR MORE)

Which Root Cause(s) or Escape Point(s) is this Action intended to address?

- Root Cause Root cause statement using a "What/Who, Action/Condition" format. Ex. Inserter tooling worn and damaged
- Escape Point Escape cause statement using a "what/who, action/condition" format. Ex. Micrometer out of calibration

Action Statement: (REQUIRED)

Give a one-line description of this Action.

Action Statement using an "Action, What, Who" format. Example: Update training program for Employees

Action Description:

If necessary, describe this Action in detail.

Rationale:

If necessary, describe why this Action is expected to successfully prevent the D2 Problem and similar problems.

Target date for implementation:

Date this Action was implemented:

Action Statement using an "Action, What, Who" format. **Example:** Update training program for Employees, Update PFMEA, Update DFMEA, affecting

Description of how the action will prevent the system to create similar problem in the future. (3rd Leg from 5why analysis)

Description of why this Action is expected to successfully prevent the D2 Problem and similar components & families, tools (gauges when it is about the escape point) equipment & processes.

Evidence to be attached on attachment section

Specific assignments, action owner & due date to be listed on assignments section



15446 - Supplier: Hierro Gris □ P/N: 525520 □ Issue: Porosity

Status 8D Status: Open as of 13-Sep-2019 by [Kyle Krahenbuhl](#)
D-Step Status: D2 not yet complete
Next Target Date: Complete through D3 by 14-Sep-2019

- General Information
- D0 - Symptom & Response 0
- D1 - Team 11
- D2 - Problem 1
- D3 - Containment 0
- D4 - Cause & Escape 0
- D5 - Define Correction 0
- D6 - Implement Correction 0
- D7 - Prevent Recurrence 0
- D8 - Recognition**
- Attachments 1
- Assignments 0
- 8D Log 8
- 8D Detail Report [options]
- Email Team

D8 - Recognize Team and Individual Contributions

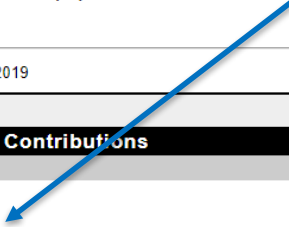
Recognition [Add a Recognition Entry](#)
Not specified.

D8 Attachments [Edit](#)
None.

D8 Assignments [Add an Assignment](#)
None.

Once corrective actions have been implemented and validated it is critical to thank and highlight any key contributor.

Add as many recognitions as needed.

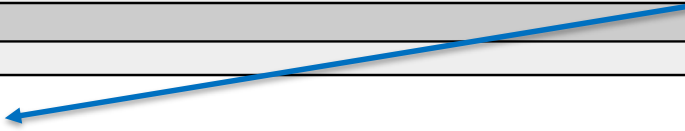


Thank the team and highlight any key contributors or supporters

D8 - Recognition Detail

Entered by: Hilda Flores
Date: 13-Sep-2019

Recognition Description: **(REQUIRED)**





KEY recommendations

D0-Only



D0 Information	
Issue Description: <i>Describe the issue that requires attention.</i>	
Action Description: <i>Describe the action that was taken to address the issue.</i>	
Date this Action was implemented: <input type="text"/>	
Cause Description: <i>If known, describe the cause of this issue.</i>	

Describe the issue answering the following questions: Who? / What? / When? / Where? / Why? / How? / How many?

Examples:

Customer rejected Model A on 3/25/15 during production for excessive noise using human ear as gauge. (5 line rejects, causing 2 pallets of 120 to be held) Line was down for 3 hours.

Plant rejected Part B on 3/25/15 at receiving for oversized OD using calipers. (3 rejected samples, causing entire lot of 300 to be rejected)

Transfers to D0 Symptom if expanded to Full 8D.

All parties involved should describe response actions taken to address the issue. Focus is towards containment and getting good parts to customer. Regal and Suppliers to complete.

Define "Who", this space is to be filled by responder and requestor, examples

- "Who" stopped production
- "Who" stopped shipment
- "Who" quarantined inventory
- "Who" sorted inventory
- "Who" posted alert
- "Who" returned inventory
- "Who" certified inventory

Transfers to D0 Emergency Response if expanded to Full 8D



D0 Information

Issue Description:

Describe the issue that requires attention.

Action Description:

Describe the action that was taken to address the issue.

Date this Action was implemented:

Cause Description:

If known, describe the cause of this issue.

If this D0-only 8D is likely to expand into a Full 8D, you can enter one Cause within this D0-only 8D. That Cause is the Occurrence one and not the Escape one.

If you enter more than one cause, it will have to be split out if expanded to a Full 8D.

If expanded, content is moved to the D4 Cause and not the D4 Escape.

Examples:

Occurrence: Inserter tooling worn and damaged causing scratched wire.
(Machine)

Revision History



Revision	Comments
May 2015	Initial Revision
May 2017	Added PRISM general overview slides with technical support, updated slides with new release screen views, modified Part/Nonconformance field functionality, labels and locations, added slides about reviewing 8Ds and then enhanced content regarding Supplier and Customer 8Ds.
June 2017	Updated URL link for PRISM portal access to point directly at Regal link vs general PRISM. Clarified 3MB max per attachment, but unlimited quantity per 8D. Enhanced D6 validation description instruction.
July 2017	Enhanced slides 56-58 content.
November 2017	Updated Supplier Information Section with costs and redistribution of the sections. Team members new selection process. Added Assignments as part of the D0-Only 8D. Select Issue Type updated with "ISO Audit". Target Dates on D0-Only according to the 8D Type. Containment Statement added "Who"
October 2018	Updated slides related to: The Supplier 8D Type has been split into Internal and External Suppliers throughout. Supplier 8Ds for Accounting and Delivery now only require the Supplier Name field and not all the other Supplier-related fields. Repeated Issue fields have been added to the 8D's General Information. New Default Team Member functionality is now available for the combination of 8D Type and Issue Type. Detailed on how to add new team members The Added-to-Team email has been updated to include "Corrective Action Instructions".
February 2019	Add up link on the reviewer section to use the 8D Detailed Report & format the table of contents
May 2020	Regal Global 8D was upgraded to include collection of both Supplier Impact and Cost Recovery information for Supplier related 8Ds. Changes to Review Groups were also made in order to better direct 8Ds to the appropriate parties. Key recommendations Full 8D and D0 Only sections added.