PROBLEM CONTROL

About this Document

This document is intended to provide users working knowledge of the Plex Problem Control system and processes they are expected to complete. Plex is an online tool that can be accessed through any standard computer with internet access.

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Contact Email: ProblemControlSupport@cvgrp.com

GETTING STARTED

Logging into Plex

1. Navigate to Plex using of the following link https://www.plexonline.com

☑ **REQUIREMENT:** As of 1/1/2016, the supported browsers are Chrome, Firefox, Safari, and Internet Explorer v. 9, 10, and 11. These must be used in order to navigate to the log in screen.

2. At the Login Screen, users will need to enter their User ID, Password, and Company Code that was provided to them during their user setup. If you do not have this information please reach out to your CVG Plant Contact.


💡 **NOTE:** If the browser and PC being used has never accessed Plex, the user will need to follow the PC Setup instructions for their browser. This button is found in the top left of the welcome screen.

3. After a successful login, users will be greeted by the main menu of the Supplier Portal screen below. Users will have access to various modules by clicking on menu buttons located within the Supplier Portal.
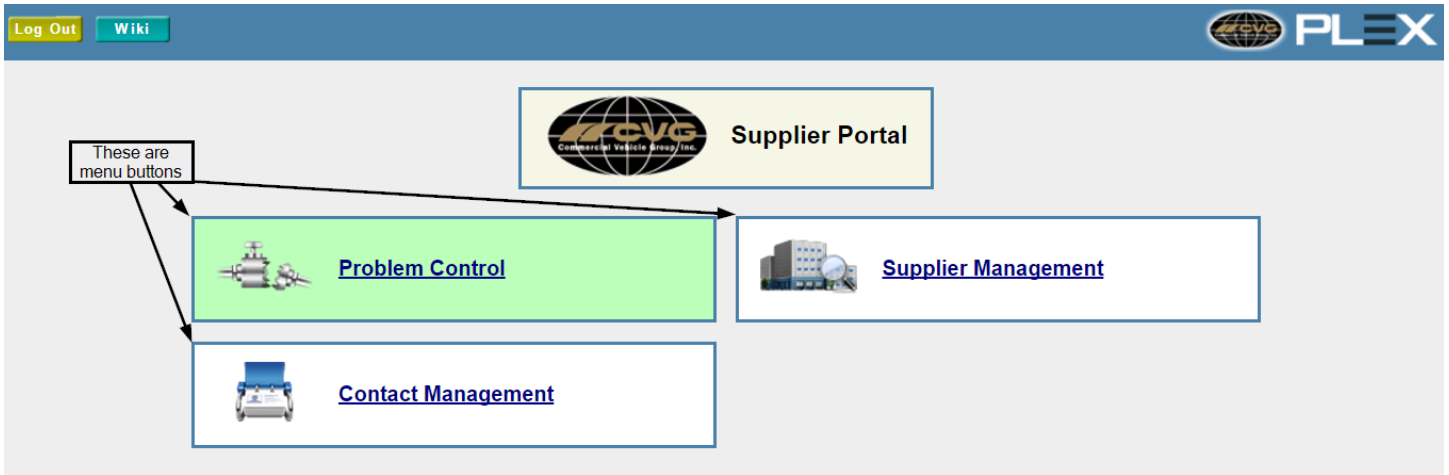
Tips and Tricks

By hovering your cursor over the CVG logo in the top right of the screen you will be able to access ways to personalize Plex to the user ID that is logged in. Doing this will bring up the hover menu seen below.
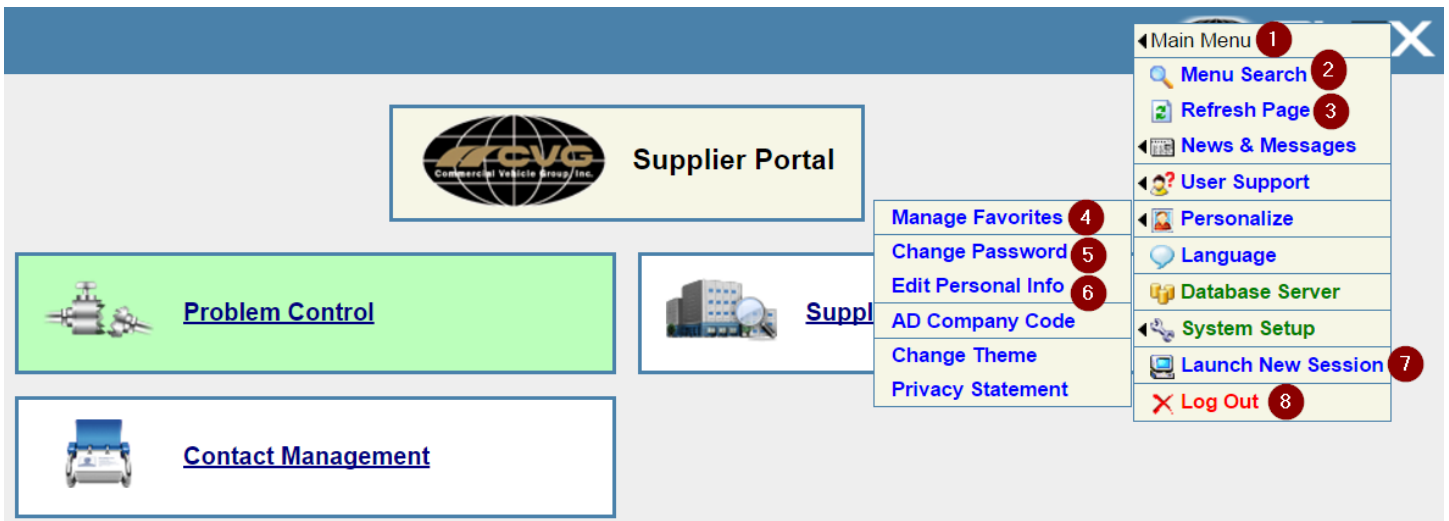

1. **Main Menu** – While within any module, clicking this will bring you back to the first screen after logging into Plex, which is main menu of the Supplier Portal.

2. **Menu Search** – Used to search for any menu button within Plex if at least part of the name is entered. The results will then allow you to jump to the selected menu button. This is useful when there are many layers to navigate through to get to the desired module or menu button.
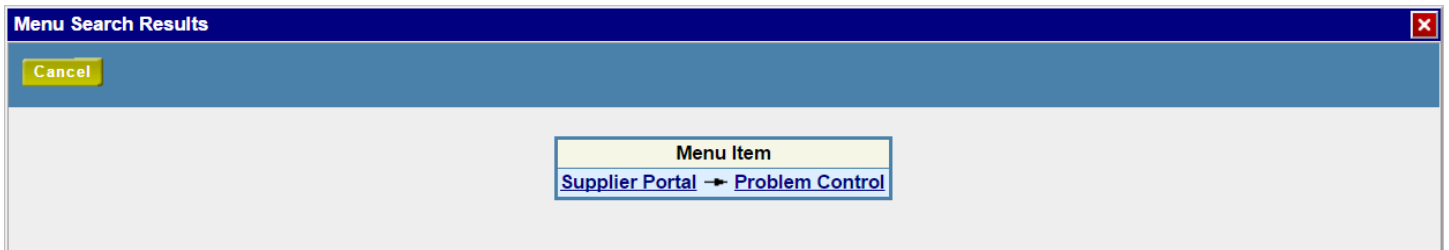
In the example below the Menu Search was clicked and we are looking for the Problem Control Module.

    a. Enter the search criteria in the field below and hit search
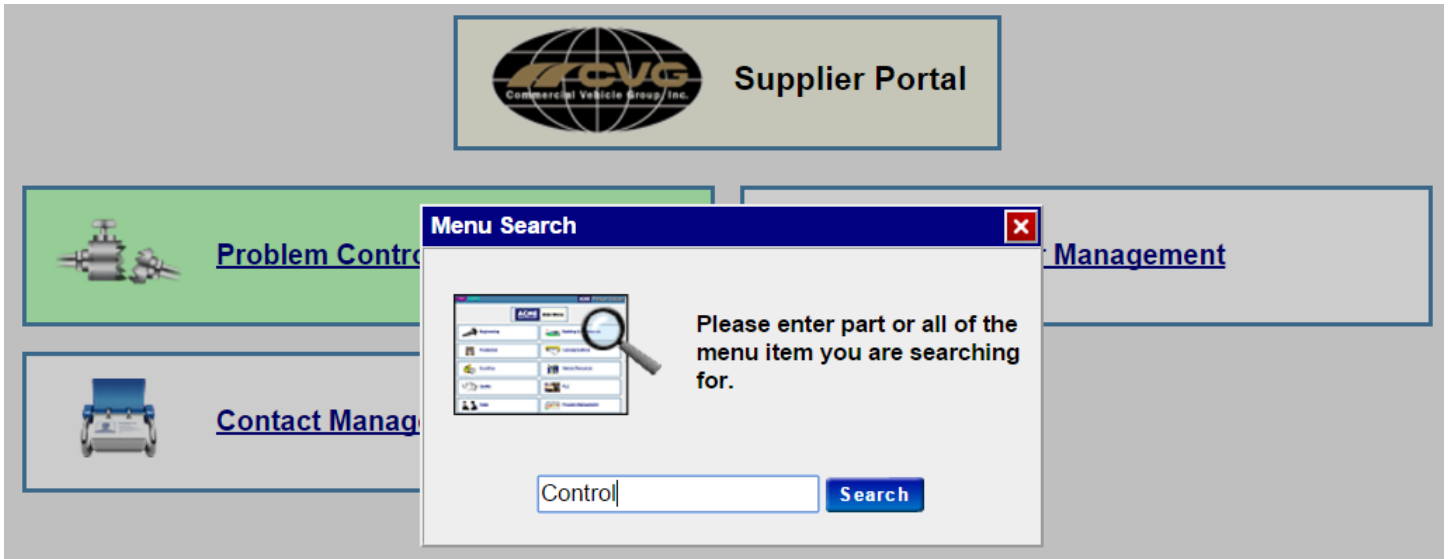
    b. Select the desired menu button from the results to go directly to that page. In this example we will select Problem Control.

NOTE: On your keyboard you can hit Ctrl + M to quickly bring up the search menu. It brings up the same menu search functionality.

3. **Refresh Page** – This will refresh the current page you are on while within Plex. This is useful if you are not seeing an update that was applied.

4. **Manage Favorites** - Menu buttons that are used frequently can be picked to display along or below the Main Menu option. Function keys can also be set up to work from the Mange Favorites screen. Below is how to setup, remove, and find favorites.

   a. Click on the menu button from the list available to set as a favorite

   b. Set your F-Key shortcut

   c. Remove from favorites list

   d. Save any changes. Changes not saved will be lost

   e. This is the location of all saved favorites

5. **Change Password** – This is where you will go to change your existing password. You will be prompted to enter your current password and then your desired password twice. Make sure to hit the Update button at the top of the page after entering all fields.

6. **Edit Personal Info** – This is where you can update the contact information for the user ID.

NOTE: Since the user ID will be shared with multiple people, CVG recommends that the contact info be to either a key contact person or a generic email address is used that many people can access at your company.

7. **Launch New Session** – A new browser session will display in the same screen that the user is currently on. This allows for multiple sessions to be run concurrently for the user ID.

8. **Log Out** – Logging out can be accomplished by either selecting the Log Out option at the bottom of the menu, selecting the Log Out button at the top left of the main menu, or closing all windows with a Plex launched session.
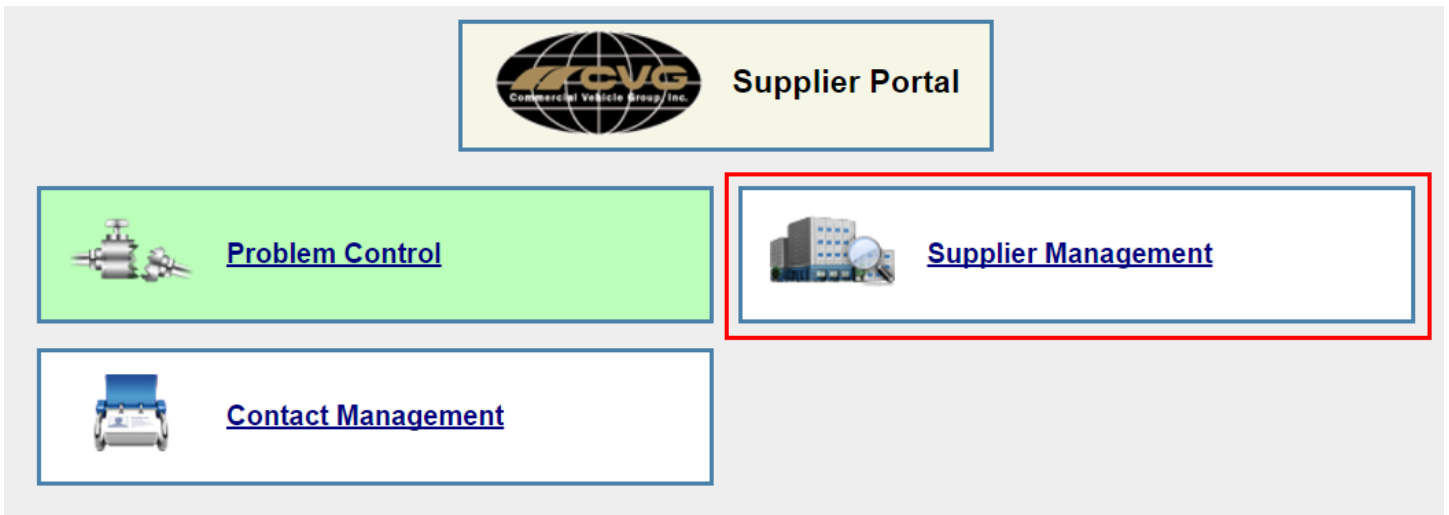
Supplier Management

The supplier management system in Plex focuses on supplier quality and performance. Suppliers will be able to view their basic company information, view any outstanding issues logged in problem control, as well as maintain a record of certifications.

Navigation

1. From the main menu click on the menu button Supplier Management.

2. Once in the module you can click into the supplier form where you can view and edit supplier details and contacts as well as add/delete certification (1), view certifications and their expiration dates (2), view how many issues are active in the problem control module (3), and any attachments linked with your account (4).

Supplier Details and Contacts

In the supplier form you will find mandatory basic information as well as optional basic information. At a minimum, this information should be checked for accuracy after the initial supplier setup is completed.

Mandatory Information

1. Name: appears on all forms and documents.

2. Supplier Code: abbreviated version of supplier name.

3. Address: mailing address for purchase orders.

Optional Information

4. Supplier Category: broad description of supplier vertical (i.e. raw material).

5. Phone: supplier's primary phone number.

6. Fax: for faxing purchase orders if needed.

7. Web Address: URL of supplier's web site.

8. Key Contact Email: for emailing purchase orders, etc.

9. Contact Note: information regarding key contact.

Supplier Contact Information

Contact Name: [_____] 🔍

5 Phone: 6142890340

6 Fax: [_____]

7 Web Address: http://cvgrp.com/ [go]

8 Supplier Email: [_____]

9 Contact Note: [_____]

3 Address: 7800 Walton Pkwy

Country: USA

State: [_____]

City: New Albany

Zip: 43054

NOTE: Greyed out fields are not editable by the user and a request to CVG to update the field will need to be submitted.

NOTE: The supplier email is populated based off of the email associated with the contact name selected.

Certification Management

Maintaining a list of current certifications and their expiration dates is easy to manage within Plex. Clicking the Add/Delete Certifications link from the supplier form will lead to where this can be achieved. Above the Add/Delete Certifications link you can see all certifications with their valid start date and expiration date.

Certifications	
	1: A2LA 1/1/16 - 12/31/16
	2: ISO 14001 1/1/15 - 1/1/16
	Add/Delete Certifications

Adding a Certification

1. Select the certification from the drop down menu.

TEST Certifications

Certification	Note	Valid Date	Expiration Date	
	This Supplier Has No Certifications, Add Certifications Below			
				+

A2LA
ISO 14001
ISO 9001
TS 16949

REQUIREMENT: If a certification is not available from the drop down menu a request will need to be submitted to your CVG plant contact.

2. Click on the calendar icon in the valid date field and select the date when the certification became valid.

3. Click on the calendar icon in the expiration date field and select the date when the certification will expire.

BUSINESS RULE: 30 days prior to a certificate expiring a notification email will be sent to the email address linked to the supplier user ID. This should allow the supplier enough time to keep their certification valid.

4. To save the certification click the plus symbol located on the far right of the row (circled in red below).

Adding an Attachment

After a certification has been added users can add any attachments related to the certification using the attachment icon (circled in red below).

Deleting a Certification

To delete a certification users would click on the red X icon at the end of the row (circled in red below). After clicking the X the certification and all attachments will be removed.

Contact Management

The contact management screen allows users to maintain their supplier contact information. This information will enable CVG to keep contact with the correct people outside of the system as well as including the correct people within the system. For example, within Problem Control a team for the supplier will be built off of the contact information available.

Navigation

From the main menu users will select the Contact Management menu button.

Adding Contacts

1. Click the green Add button at the top of the contact page

2. Enter all mandatory information, these include the following;

    a. Name: appears on all forms and documents

    b. Contact Type: this will remain Supplier

    c. Email Address: the email address linked to the supplier contact

    NOTE: All other fields are optional but recommended if available.

    NOTE: Plex generated emails and notifications directed to the contact will use the information stored in the email address field.

3. Hit the green update button at the top of the page to save the new contact or any changed made to an existing contact.
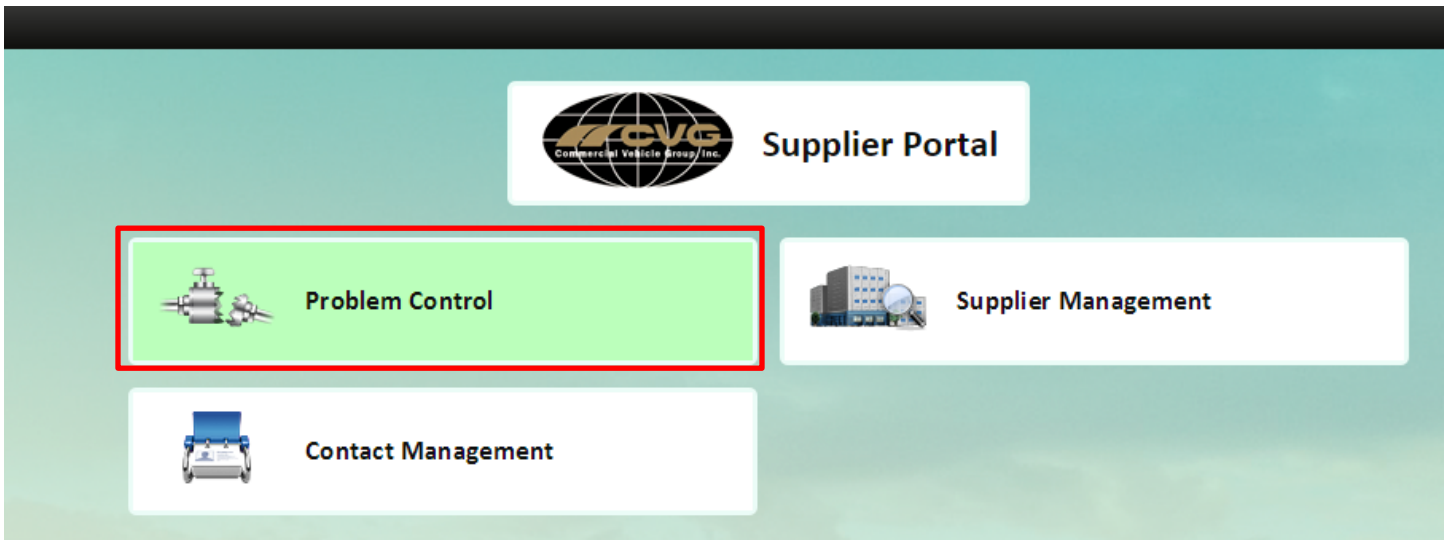
Problem Control

The Problem Control module will be utilized to enhance the communication on Corrective Action plans with Suppliers and CVG.

Navigation

1. Navigate to Problem Control Module from the Supplier homepage.

2. The Problem Control Module will be displayed. The system will display all active issues for the Supplier logged into the system. Navigate to the first column and select the number that corresponds to the current issue being worked on.

3. The top portion (gray background) of the 8D form will contain information that CVG Quality team has provided. The bottom portion (blue background) of the 8D form will contain information that will be provided by the Suppliers, which is covered in the sections below.

8D 9

SUPPLIER INFORMATION				
	Supplier:	XYZ	Supplier User:	
	Email:		Supplier Phone:	

Step 1 - DEFINE PROBLEM				
	Brief Description:	TEST		
	Full Description (Required):	test		
	Category:	Supplier	Form Type:	8D
	Problem Type:	Supplier Quality	Severity:	5
	Plant:	Vonore		

PROBLEM IMAGES (Click the paperclip at top right corner of screen, click ADD to attach JPG photos)		
		No Viewable Images are Attached

INTERNAL PART INFORMATION				
	Part Number:		Part Name:	
	Defect Type:	Dimensional Issue	Quantity Placed on Hold:	0
	Quantity Rejected:	200		

OWNERSHIP / STATUS				
	Current Status:	Open / In-Process	New Status:	
	Champion:	Megan DelGenio	Champion Phone:	614-289-0316
	Recorded By:	Megan DelGenio	Recorded Date:	1/18/16 1:09 PM
	Customer Issue Date:		Date of Occurrence:	1/18/16
	Overall Clean Point Date:		Target Close Date:	
	Updated By:	DelGenio, Megan	Updated Date:	1/18/16 1:09 PM
	Actual Close Date:			

Cost Recovery	
	No cost recovery has taken place.

Step 2 - DEFINE TEAM	
	New Team Member

BUSINESS RULE: Suppliers are required to maintain/update the "New Status" field located within the Ownership/Status (gray background) section.

Initial Response

Suppliers are required to complete this section based on the response to the quality issue within 24 hrs. of occurrence.

1. Initial Response Due: This date has been set by the CVG Quality team to have the Initial Response completed.(24 hrs. after occurrence)

2. Initial Response Date: Input date acknowledging the quality issue

3. Response: Include any detail regarding the Initial Response for quality issue

4. Build/Ship Date: Date that container shipped parts containing defective parts

5. RMA: Input Cost Recovery RMA number

6. Disposition Type: By selecting the binoculars, chose the corresponding action for the quality issue.

7. Lot Number: The number for the lot of defecting parts

NOTE: When completing a field using the **binoculars**, in order to change the selection, delete the existing information in the cell and then reselect binoculars to choose new option.

Add Containment Section

Suppliers are required to supply CVG with the Containment Action for quality issue within 24 hrs. of occurrence. Complete containment action with details for supplier, in transit and at all CVG plants.

1. Navigate to the Containment area on the 8D form, and select the "New Containment Action". A new window will appear to input Containment information.

2. New Containment Action Completion

    1. Containment: Suppliers are mandated to include in their containment:

       A) Supplier in House, B) Parts in Transit and C) All CVG Plants.

    2. Problem Action Due Date: Select Due Date for Action

    3. Problem Action Completion Date: Select Date Action was completed

    4. Clean Point Date: Select Date that containment will be at Clean Point

    5. Add: Navigate to add button to add this Containment Action. (A pop up window will appear to add responsible team members)

3. The new display will allow the user to assign responsibility for the containment. By selecting the binoculars, a window will appear with contacts that can be selected. Navigate to the green add button located at the top of the form to successfully add Containment action members. Select the

back button once all Containment Action members have been assigned. This button is located in the top left area of the screen

💡 **NOTE**: Suppliers may assign CVG users to containment actions.

4. The Containment Action will reappear with the option to make any necessary changes. Select the Update button (located at the top of the screen) and then the back button to return to the 8D form.

5. After Containment Action has been implemented go to the **Ownership/Status Section** and update the **New Status** field to: Containment Implemented.

Communication Section

This optional section can be used to add any additional notes/ communication regarding the 8D.

1. Navigate to New Notes.

2. Enter notes into note section then select add.

3. The new display will allow the user to assign responsibility for the note (if needed). By selecting the binoculars, a window will appear with contacts that can be selected. Navigate to the green add button located at the top of screen to successfully add action members. Select the **back button** once all action members have been assigned.

Cause Analysis

The Cause Analysis is the process to identify the process that caused the failure. This section contains a standard Five Why to complete for the cause analysis. In lieu of this Five Why, you may choose to use your own problem and root cause analysis tools, such as Fishbone Diagram, Situation Appraisal, Problem Analysis, and/or Decision Analysis documents. Please refer to the Root Cause section for instructions on how to add a non-Five Why Cause analysis.

How to add Five Why

1. Navigate to the Cause Analysis section, select Add Five Why. This will open a new screen to complete Five Why.

2. Complete (1) Issue Title field and (2) Customer Concern fields. Select add once information has been completed, this will return user to 8D form.

3. Navigate to Cause Analysis section, click on "Complete Five Why". (shown below)

Step 4a - CAUSE ANALYSIS

In lieu of this Five Why, you may choose to use your own problem and documents in the Root Cause section below, once the root cause is add

Five Why **Complete Five Why**

8D 9 Five Why List

Five Why Line Type	Line Code	Five Why	Corrective Action	Owner	Due Date	Completion Date
Why Made Use this path for the specific nonconformance being investigated.	Why		Add Corrective Action			
	Answer		Add Corrective Action			
	Why		Add Corrective Action			
	Answer		Add Corrective Action			
	Why		Add Corrective Action			
	Answer		Add Corrective Action			

4. Complete the Why Made, Detection, and Systemic sections of the Five Why, Select Update located at the top of the form once completed.

NOTE: Refer to Table of Contents for instructions on how to add corrective action if needed.

Root Cause

Root cause must address the problem statement. Supplier must show some type of cause analysis methodology of how the root cause was determined. Root Causes without methodology will not be accepted.

1. Navigate to Root Cause section and select New Root Cause.

2. Complete Root Cause description, and then select add. This will return the user to 8D form.

💡 **NOTE:** Root Cause Date will be automatically defaulted to date entered, if this is incorrect, select calendar to make any adjustments.

Attaching Problem Analysis to Root Cause

1. Navigate back to the Root Cause section and select the date that Root Cause was entered.

2. Root Cause will display on screen, select the paperclip to attach documents.

3. Pop up window will appear, navigate to the "Add" button of window, click add

4. Pop up window will appear with various options to upload images/files, select option that best fits need.
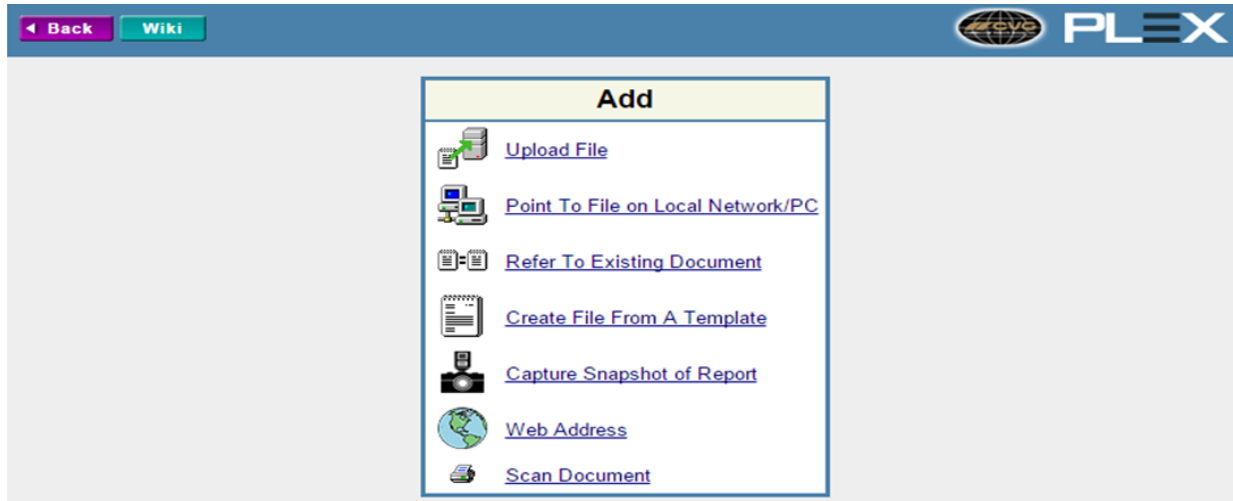
5. Once attachments added, pop up window will appear displaying the files attached.
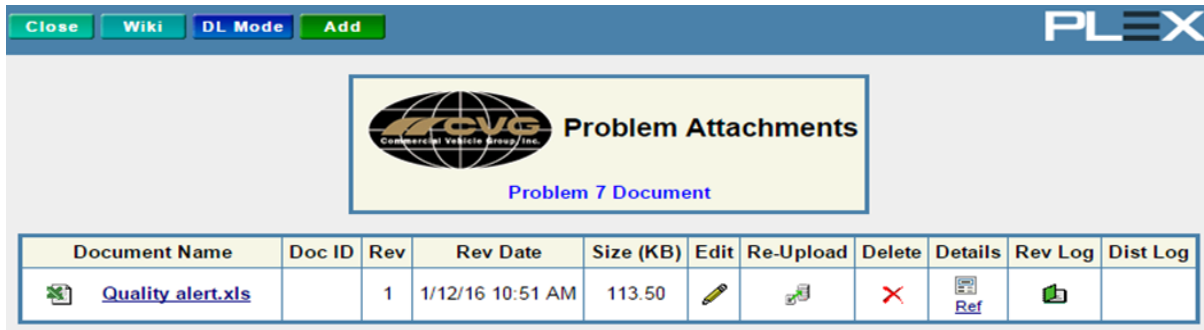
Permanent Corrective Action

Complete with information regarding the Permanent Corrective Action/Long term Countermeasures of quality issue.

1. Navigate to the Permanent Corrective Action Section and select New Corrective Action.
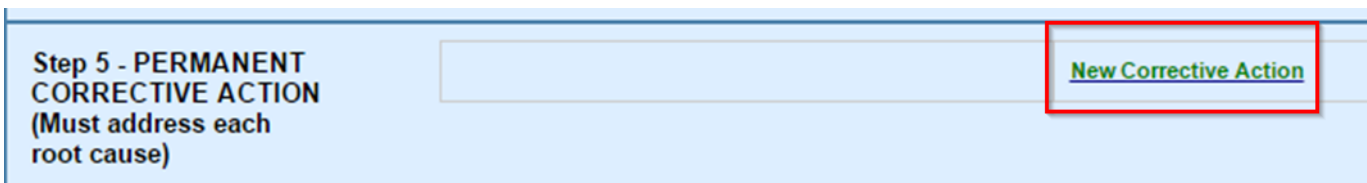
2. Complete the fields below, select add once completed.

1. Impacts: select from drop down list

2. Impact Note: complete based on impact selected

3. Corrective: complete information based on corrective action taken place

4. Problem Action Due Date: Select Due Date for Action

5. Problem Action Completion Date: Select Date Action was completed

6. Clean Point Date: Select Date that action will be at Clean Point

3. The new display will allow the user to assign responsibility for the Corrective Action (if needed). By selecting the binoculars, a window will appear with contacts that can be selected. Navigate to the green add button located at the top of screen to successfully add action members. Select the back button once all action members have been assigned.

4. After Permanent Action Implemented has been implemented go to the **Ownership/Status Section** and update the **New Status** field to: Permanent Action Implemented

Supplier Verification

This section will be utilized to gain verification from the CVG Quality department.

1. Navigate to the Supplier Verification section, and select New Verification Action.

2. Complete the fields below, select Add.

1. Verification: Provide details for the verification of the quality issue

2. Problem Action Due Date: Select Due Date for Action

3. Problem Action Completion Date: Select Date Action was completed

4. Clean Point Date: Select Date that action will be at Clean Point

3. The new display will allow the user to assign responsibility for the Verification. By selecting the binoculars, a window will appear with contacts that can be selected. Navigate to the green add button located at the top of screen to successfully add verification members. Select the back button once all verification members have been assigned.

Add

Problem 9 Verification Action Member

Supplier **Test** User:	
Commercial Vehicle Group User:	(Select only one name)
Non Commercial Vehicle Group User:	
Position:	
Phone:	
Email:	
Note:	

4. After Verification has been requested go to the ***Ownership/Status Section*** and update the ***New Status*** field to: Submitted for Closure.

Control Prevention

This section will provide CVG with a better understanding regarding the supplier's steps being taken to ensure quality issues will be prevented.

1. Navigate to the Control Prevention section, and select New Preventative Action

Step 7- CONTROL / PREVENTION		New Preventative Action

2. Complete the fields below, select Add

    1. Impacts: select from drop down list

    2. Impact Note: complete based on impact selected

    3. Preventative: complete information based on preventative action taken place

    4. Problem Action Due Date: Select Due Date for Action

    5. Problem Action Completion Date: Select Date Action was completed

    6. Clean Point Date: Select Date that action will be at Clean Point

3. The new display will allow the user to assign responsibility for the Preventative Action. By selecting the binoculars, a window will appear with contacts that can be selected. Navigate to the green add button located at the top of screen to successfully add action members. Select the back button once all action members have been assigned.

Process FMEA Revision

For all issues at minimum Failure Mode Effect Analysis review is mandatory.

1. Complete Section below:

       1.FMEA Due:

       2.FMEA Update Req

       3.FMEA Completed:

       4.FMEA Re-Eval

Control Plan Revision

For all issues at minimum Control Plan review is mandatory.

1. Complete Section below:

    1. CP Due:

    2. CP Update Req:

    3. CP Completed:

    4. CP Re-Eval:

NOTE: If company does not utilize FMEA/Control Plan please review Work Instructions, Process Flows, etc.....

Print/Email Copies of the 8D

1. Navigate to the top of the 8D form and select the "Print button".

2. A pop up window will display with all of the sections of the 8D. The user has the option to print all or just certain sections of the form. Select "Submit" when finished.

3. A pop window will appear with containing the requested 8D information. The user now has the options to Print, Email, or Fax the 8D information.

| Close | Wiki | | Print | Email | Fax | PLEX |

Commercial Vehicle Group - Sandbox
7800 Walton Pkwy
New Albany, OH 43054
Tel 614.289.5360

Problem Report
8D 9

SUPPLIER INFORMATION	Supplier:	TEST	Supplier User:	
	Email:		Supplier Phone:	

Step 1 - DEFINE PROBLEM	Brief Description:	Part Issue		
	Full Description (Required):	More Detail regarding Defect Details		
	Category:	Supplier	Form Type:	8D
	Problem Type:	Supplier Quality	Severity:	2
	Plant:	Concord		

Add Team Members

This section allows Suppliers to create teams that need to stay up to date with the 8D.

1. Navigate to Define team section, and select "New Team Member"

2. A new window will appear with various options, select the radio button for the appropriate group.

3. A new field will appear below the initial information. The user will select the binoculars to select the appropriate members. Once member is chosen select the Add button

4. An email notification will be sent to team members that have been added.

Add

The Team Member was successfully added.

Problem 14 Team Member

User Type: ○ **Test** User   ○ **Test** Contact
             ○ **Commercial Vehicle Group** Users   ○ **Manually Added Team Member**

Problem 14 Team

Name	Email Address	Phone
DelGenio, Megan	megan.delgenio@cvgrp.com	614-289-0316