

ISSUES system Overview

The Issues system is integral to maintaining ISO standards, BSI Technical Files,

An issue is in essence an Outstanding Job / Action or Task.

Any employee can generate an Issue, All employees can and will receive Issues.

holding the Issues together are Company Meetings,

Board Meeting

Management Meeting

Customer Complaints Meeting

Stock Meeting

Sales and Marketing Meeting

Production Meeting

Projects Meeting.

Each Meeting has a Fixed Agenda of Headers:

When Adding an Issue to the System, the USER must pick a suitable header from a suitable Meeting,

E.g.

Stock Meeting Returns Overview - From Customers (9)

The screenshot shows a web application interface with a blue header bar containing the title "Stock Meeting - Returns Overview - From Customers". Below the header, there is a "Subject" label followed by a text input field. Underneath the input field is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), text color (ABC), background color, bulleted list, numbered list, and link (Ω). Below the toolbar is a large white text area for the subject content. To the right of the text area, there is a "Related to Issue" label and a dropdown menu currently showing "Derek Lamb". Below this, there are two labels, "PO Ref:" and "Opera A/c:", each followed by a text input field. Further down, there are two labels, "Mark as Important" and "Mark as Read only", each followed by an unchecked checkbox. At the bottom of the form is a button labeled "Add Issue".

Once an Issue has been created it can ONLY be cleared from the system by the person that created it,

In the case of system generated issues,

Auto Calender Issues can only be cleared by MD Weekly Review ,

Auto Meeting Issues can only be cleared by Formal Meeting ,

ISSUES from the USER perspective

Each user has their own unique login to Intrastats,

On the front page – the user will see a list of outstanding Issues

Derek Lamb 35 Outstanding Issues | Imported 17 Mar | Out of Office: Catherine Spence, Philip Crossley, Ryan Swaine, Future

Issue	Meeting	Header	Subject	Created By	Issued To	Age
25713	Calibration	Calibration	Calibration CE:CE138	Derek Lamb	Derek Lamb	135
26074	Any Changes in Agenda	Management Meeting	Viamed holdings and Viamed Trading	Auto_Calender	Derek Lamb	107
27216	Calibration	Calibration	Calibration CE:CE004	Derek Lamb	Derek Lamb	38
27217	Calibration	Calibration	Calibration CE:CE169	Derek Lamb	Derek Lamb	38
27293	ToDo	Helen Lamb	check johns android was paid privately	Helen Lamb	Derek Lamb	31
27363	Stock Meeting	Any Other Business	Emergency stock shelves - stock levels 180211	Steve Nixon	Derek Lamb	27
27395	Non Conformance Issues	Non Conformance Issues	Please look at sysrem for picking part deliveries	Helen Lamb	Derek Lamb	23
27692	BSI Audits Calander	BSI Audit Production	Audit 15	Auto_Calender	Derek Lamb	3
27796	Stock Meeting	Returns Overview - From Customers	Items Showing as Out to Supplier on repairs	Jonathan Connor	Derek Lamb	3
27819	Any Changes in Agenda	CE Files Review	Product / Design Changes	Auto_Calender	Derek Lamb	1
24747	BSI Audits Calander	BSI Audit Handling and Storage	FIFA	Derek Lamb	Derek Lamb	218
24748	BSI Audits Calander	BSI Audit Handling and Storage	coshh documents	Derek Lamb	Derek Lamb	218
25011	Web Site Updates	Web Site Updates	Website Amends - From Meeting 8th September	Catrin Hird	Derek Lamb	189
25180	Web Site Updates	Viamed New Web Site (dereks)	Promoting Social Media Networking - E-shot	Catrin Hird	Derek Lamb	171
25758	Sales And Marketing	Staff	contracts of employment for Catrin and Rose	Helen Lamb	Derek Lamb	135
25819	BS EN ISO 13485:2003	Document Control Amendments needed	VM3COP18 Post Market Surveillance Requires Updating	Derek Lamb	Derek Lamb	129

This lists the Meeting and Header the Issue is linked to, a Brief subject regarding the issue, whom owns / created the issues, and the age of the issue in Days.

Any updates not yet read are highlighted via the PEN symbol.

Further down the front page

27831	Stock Meeting	Any Other Business	Nigel Harper Commissions to do	Helen Lamb	Derek Lamb	0
My Created Issues Not yet Read (1)						
Issue	Meeting	Header	Subject	Created By	Issued To	Age
27798	BS EN ISO 13485:2003	Document Control Amendments needed	faulty files	Derek Lamb	John Lamb	3
My Created Issues Still outstanding (24)						
Issue	Meeting	Header	Subject	Created By	Issued To	Age
25713	Calibration	Calibration	Calibration CE:CE138	Derek Lamb	Derek Lamb	135
27143	Vandagraph Issues	Vandagraph Issues	vandagraph opera	Derek Lamb	Helen Lamb	42
27216	Calibration	Calibration	Calibration CE:CE004	Derek Lamb	Derek Lamb	38
27217	Calibration	Calibration	Calibration CE:CE169	Derek Lamb	Derek Lamb	38
27363	Stock Meeting	Any Other Business	Emergency stock shelves - stock levels 180211	Steve Nixon	Derek Lamb	27

The User can see Issues they have created, that have not yet been read / prioitised, or any issues still outstanding.

They can also see any Issues that are ready for completion.

Reading an Issue

First time a user reads a new Issues they are presented with:

The screenshot shows a web interface for reading a new issue. At the top, a status bar indicates 'Derek Lamb 36 Outstanding Issues', '1 Unread Issues', and 'Imported 17 Mar'. Below this is a row of icons for various services like Google, ISO, and Opera. The main heading is 'Show Open Issues' followed by 'Reading New Issue #27832 - Click as Read or Update Issue to Move on'. The issue details include 'Tets', 'zztest part1 zztest part 3 subject 2 zztest part 3 subject 2', '# 27832 - Created: 17/03/11 By Derek Lamb', and 'Set to User: Derek Lamb'. A 'Mark As Read' button is available with 'Low', 'Medium', and 'High' priority options. A note states 'Do not Mix Priority Buttons with New Notes in Green section'. The 'New Notes' section has a text area and a 'Subject' dropdown. The 'Related Issue' section has an 'Add File To Issue 27832' button. The 'Next Action' dropdown is set to 'Derek Lamb' and the 'Priority' is '5'. A 'Confirm I have updated the Issue' button is at the bottom. A table at the bottom shows the 'Combined Issues Notes' log.

Issue	Date	User	Action / Notes
27832	17/03/11	Derek Lamb	Re-Read

They have the option to quickly tag the Issue as LOW / MEDIUM / HIGH Priority, (once click the issue will be added to the list of outstanding issues and ordered based on the priority selection.

Or they can comment on the issue / complete it, or send the issue to another user.

When commenting / updating an Issue you MUST add some notes. The minimum you should put in updating an issue is the word 'Done'.

Simply updating without any notes leads to Issues bouncing back and forwards between people.

For issues that are bounced around different users, updated / read at different time a log is generated at the bottom of the Issue

e.g.

Combined Issues Notes (Comment order might be out of context - Read Original Issue to be sure)			
Issue	Date	User	Action / Notes
25011	17/03/11	Derek Lamb	Re-Read
25011	03/03/11	Catrin Hird	Re-Read
25011	02/03/11	Derek Lamb	Re-Read
25011	21/02/11	Derek Lamb	Viewed Status
25011	21/02/11	Derek Lamb	Re-Read
25011	21/02/11	Catrin Hird	New website to be arranged.
25011	21/02/11	Catrin Hird	Re-Read
25012	20/01/11	Catrin Hird	Complete from SN
25012	20/01/11	Catrin Hird	Complete from SN
25012	20/01/11	Catrin Hird	Completed
25011	18/01/11	Derek Lamb	Re-Read
25011	18/01/11	Derek Lamb	Viewed Status
25011	18/01/11	Derek Lamb	Re-Read
25011	17/01/11	Catrin Hird	Re-Read
25011	17/01/11	Catrin Hird	Re-Read

Issues and Meetings

During regular Meetings as the agenda is followed All outstanding Issues between users, and or System Issues, are presented.

See the document

How to Hold Intrastat Meetings

For further details,

Automatic Issues

The system will generate from time to time Automatic Issues,
These can be day to day jobs such as Check Price Lists, to Yearly Audits,
E.G.

1	18/Mar/2011	General Maintenance Requirements General Maintenance Requirements	Outside Heating Guard	Helen Lamb	Cancel
12	22/Mar/2011	BSI Audits Calander BSI Audit CE Files	Audit 12	Derek Lamb	Cancel
1	24/Mar/2011	Sales And Marketing Leaflets	check the Price list racks	Jonathan Connor	Cancel
6	25/Mar/2011	BSI Audits Calander BSI Audit Customer Complaints	Review Paper Customer Complaints File	Derek Lamb	Cancel
1	28/Mar/2011	Stock Meeting Returns Overview	Return Goods to Suppliers	Derek Lamb	Cancel
12	28/Mar/2011	BSI Audits Calander BSI Audit Organisation and Process Verification	BSI Audit Organisation and Process Verification	Derek Lamb	Cancel
3	29/Mar/2011	General Issue General Issue	Weee Report Due Vandagraph Qtr	Derek Lamb	Cancel
3	31/Mar/2011	Stock Meeting Stock Meeting	Quartly Stock Meeting Due	Derek Lamb	Cancel
1	01/Apr/2011	Management Meeting Turnover Report	Debtor Figures	Helen Lamb	Cancel
1	01/Apr/2011	Sales And Marketing Post Market Surveillance	View Sales Warnings	Derek Lamb	Cancel
1	01/Apr/2011	Sales And Marketing Post Market Surveillance	View Sales Warnings	Steve Nixon	Cancel
1	01/Apr/2011	Sales And Marketing Post Market Surveillance	View Sales Warnings	Steve Hardaker	Cancel
1	01/Apr/2011	Sales And Marketing Post Market Surveillance	View Sales Warnings	Ryan Swaine	Cancel
1	01/Apr/2011	Stock Meeting UPS Shipping Fuel Surcharge	UPS Rates	Derek Lamb	Cancel
1	01/Apr/2011	Stock Meeting Returns Overview	Request RMA`s	Jonathan Connor	Cancel
1	01/Apr/2011	Stock Meeting Returns Overview	Check Vandagraph Returns	Jonathan Connor	Cancel
1	02/Apr/2011	Management Meeting Turnover Report	Debtors and Creditors Figures	Helen Lamb	Cancel
1	05/Apr/2011	Management Meeting Future Reviews - Risk Assessment HSE	Fire Alarm Test	Helen Lamb	Cancel

Automatic Issues can ONLY be cleared from the system during a Meeting.