

## Creating a New NCR/ECR

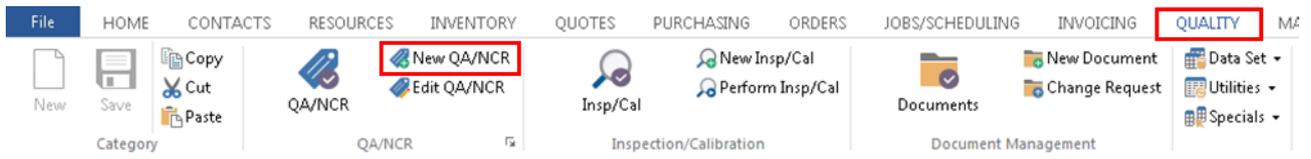
### Overview:

An NCR/ECR record (or Quality Assurance record) is created in response to a quality issue or incident within the organisation. The issue may be a minor incident such as a slight fixable imperfection on a product or part to a major incident such as a faulty product that needs to be totally remanufactured. The incident is tracked throughout the process from the time it is raised/created to the issue being resolved and finalised. (**NCR/ECR = Non Conformance Report/Engineering Change Report**)

Quality Assurance records can be created from the following windows-

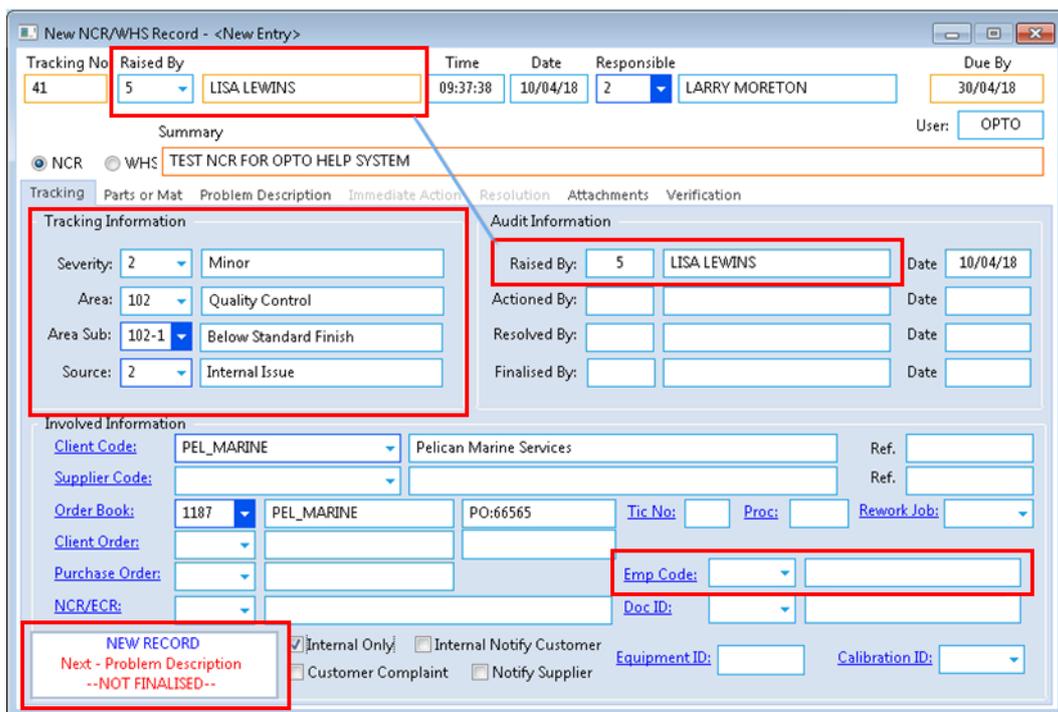
- Quality Management System – QUALITY Tab
- Client Details window
- Supplier Details window
- Employee Details window
- Edit Order Book window

Create an NCR/ECR from the **QUALITY** Tab on the Opto Ribbon - and **click** on 'New NCR/ECR' option.



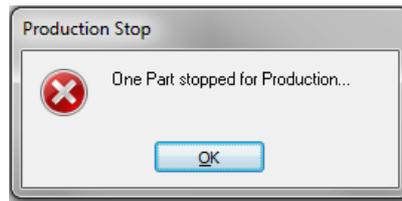
The name of the person logged onto Opto who creates the NCR will automatically appears in the "Raised By" field of the new entry. **Click** in the "Responsible Employee" field, and **press** <F2> and select an employee from the pop-up list, this is the person who will be responsible to follow up /resolve the issue/item. **Click** OK, then enter the "Due By Date" (a date in the future that the issue will be resolved and finalised) **press** <TAB>.

In the "Severity" field in the 'Tracking' section of the window, **press** <F2> and select a severity category from the pop-up list, **click** OK and **press** <TAB> to advance to the "Area" field. **Press** <F2> and select an Area category from the pop-up list, **click** OK, and then **press** <TAB> to advance to next field. Continue as above with the "Area Sub" field and the "Source" field. **Press** <TAB> to continue with further fields as necessary.

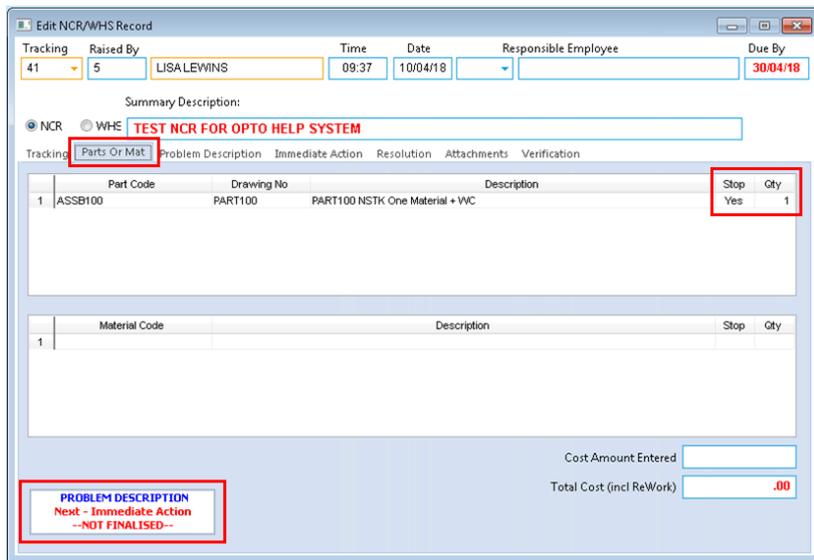
A screenshot of the 'New NCR/WHS Record - <New Entry>' window. The window contains several sections: 'Summary' with fields for Tracking No (41), Raised By (LISA LEWINS), Time (09:37:38), Date (10/04/18), Responsible (LARRY MORETON), and Due By (30/04/18). Below this is the 'Tracking Information' section with fields for Severity (2 - Minor), Area (102 - Quality Control), Area Sub (102-1 - Below Standard Finish), and Source (2 - Internal Issue). To the right is the 'Audit Information' section with fields for Raised By (LISA LEWINS), Date (10/04/18), Actioned By, Resolved By, and Finalised By. The 'Involved Information' section includes Client Code (PEL\_MARINE), Supplier Code, Order Book (1187), Client Order, Purchase Order, and NCR/ECR. At the bottom, there are checkboxes for 'Internal Only', 'Internal Notify Customer', 'Customer Complaint', and 'Notify Supplier', along with fields for 'Emp Code', 'Equipment ID', and 'Calibration ID'. A status pane at the bottom left indicates 'NEW RECORD' and 'Next - Problem Description --NOT FINALISED--'. Red boxes highlight the 'Raised By' field, the 'Severity' field, the 'Area' field, the 'Area Sub' field, the 'Source' field, the 'Emp Code' field, and the status pane.

The "Emp Code" field is could be used to record an employee who may be connected to the issue, that is they may have been involved or contributed to the incident/ issue/ or outcome. Please notice the status pane at the bottom left of the window.

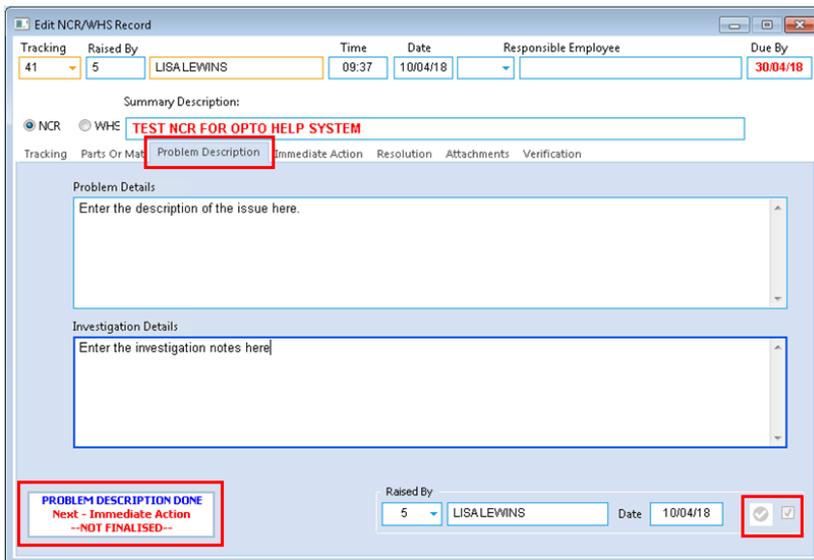
**Open** the "Parts or Mat" tab and enter Part and/or the Material code if necessary, **press** <TAB> to display details of parts/materials. If production has been stopped on part/materials due to this record, enter **Yes** in the "Stop" field. A pop-up message will appear when the record is saved to alert the user that production has been stopped.



Enter the quantity of affected parts/material and enter 'Cost Amount' if known.



**Open** the "Problem Description" tab and type a description of the issue in the Problem Description area and any Investigation Details or notes in the bottom area. The "Raised By" and "Date" fields are automatically generated. When finished entering details **click** on the **Confirm** icon to finalise this step and activate the next step of the process. The "Immediate Action" tab is now accessible.



The item has been raised and is waiting to be Actioned. (See *Finalise and/or Edit an NCR/ECR*)

**Press** <F9> to save.