Des 2023

WATS Feature Release Note
Root Cause Analysis 24.1

Major Feature Areas

Root Cause Analysis

The Root Cause Analysis (RCA) module seamlessly integrates with the WATS Reporting tool. It serves as a versatile tool following the D8 RCA setup and is applicable to various cases, extending beyond WATS-specific scenarios.

Ticket List Views for Comprehensive Overview

For a holistic perspective of all tickets at various stages, the tickets are organized into distinct ticket list views.

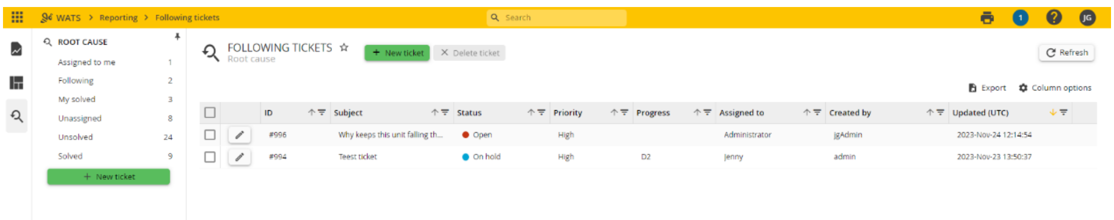
1. **Assigned to Me:**
   - Shows tickets assigned to the logged-in user.
2. **Following:**
   - Displays tickets created by the user or those assigned to them as an assignee or team member.
3. **My Solved:**
   - Contains tickets resolved by the user as an assignee.

Users with specific permissions gain access to additional views, such as:

- **Unassigned:** All tickets without assigned personnel.
- **Unsolved:** All tickets yet to be resolved.
- **Solved:** All tickets that have been successfully resolved.

Navigation in the RCA Main Menu

In the RCA main menu, users can effortlessly navigate between different views and create new tickets. The total ticket counts for each view are conveniently displayed alongside the navigation options, providing a quick snapshot of ticket distribution.

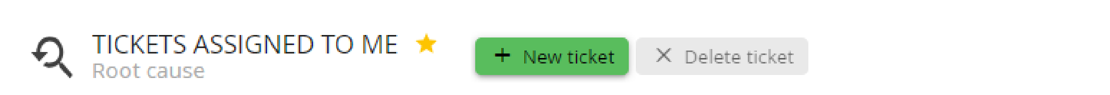


Create a ticket

When working with the Root Cause Analysis (RCA) module, there are multiple methods available for creating a new ticket. Follow the steps below based on your workflow:

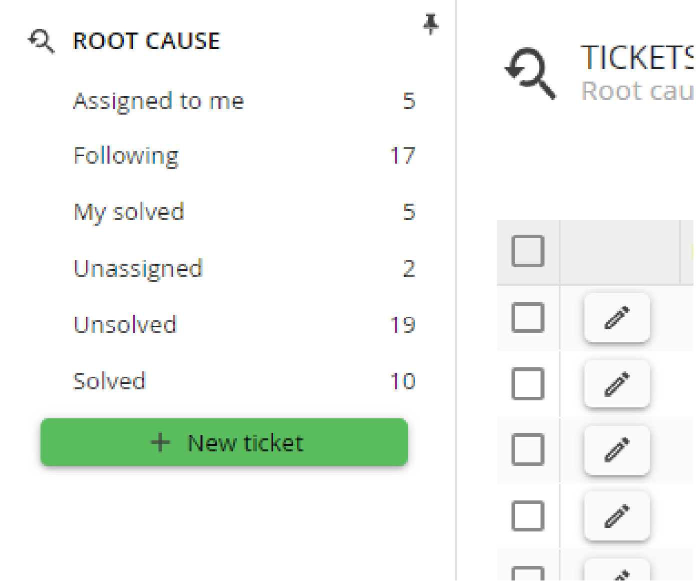
Method 1: Within the RCA Module

1. Navigate to the RCA module.
2. Once inside the module, locate the "+ New Ticket" button situated at the top left of the ticket list view.
3. Click on the "+ New Ticket" button to initiate the ticket creation process.



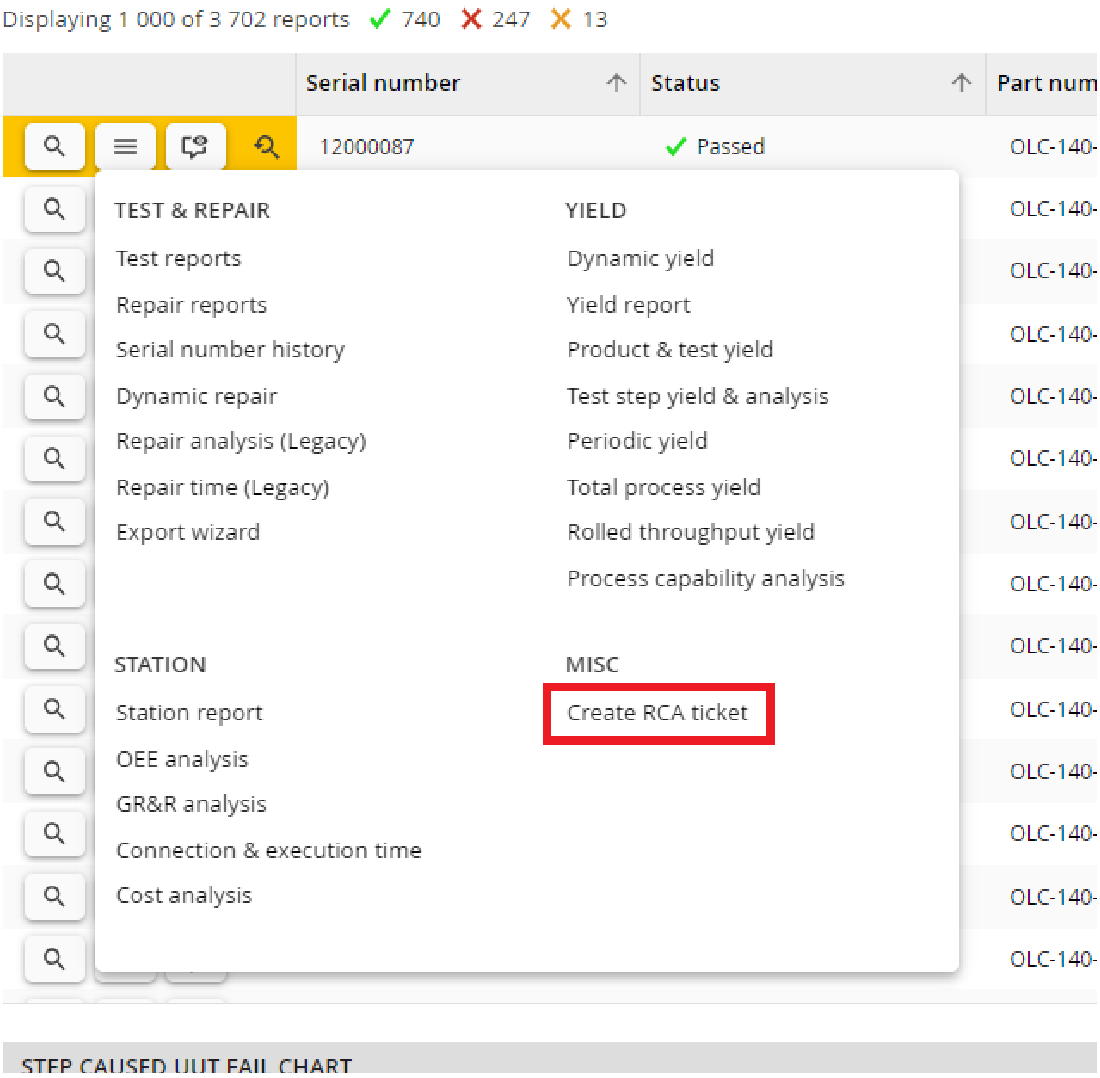
Method 2: Using the RCA Main Menu

1. Access the RCA module.
2. From the main menu of the RCA module, find the option for creating a new ticket.
3. Follow the prompts to generate a new ticket.



Method 3: Ticket Generation from a Report

1. While viewing a report, identify the "Drill-Down" button.
2. Click on the "Drill-Down" button and select the "Create RCA Ticket" option.
3. The system will direct the newly generated ticket to the "Following" ticket-list view.
4. This ticket will include searchable tags and links to referenced Test/Repair reports.



Saving Changes:

- Any changes made will be automatically saved to the server upon clicking "Save."
- If you decide to leave without saving, all changes will be discarded.

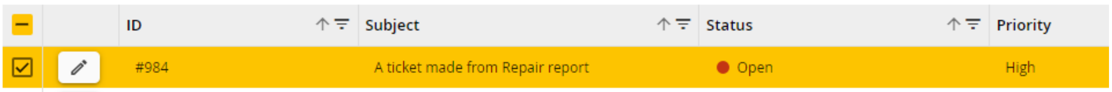
By utilizing any of these methods, you can efficiently create tickets in the Root Cause Analysis module, ensuring seamless tracking and documentation of relevant information.

Update a ticket

When it comes to updating Root Cause Analysis (RCA) tickets, you can choose from three convenient methods:

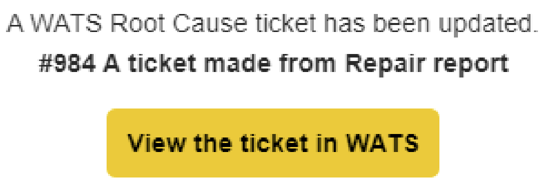
Method 1: Ticket-List View

1. Navigate to the ticket-list views within the RCA module.
2. Initiate the update by either double-clicking on the desired ticket row or clicking the "Edit" button associated with the ticket.



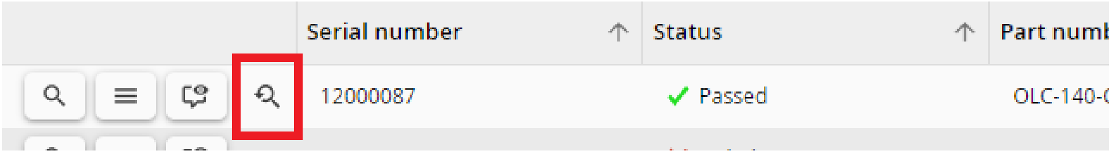
Method 2: RCA Notification Email

1. Open the RCA notification email you have received.
2. Use the link provided in the email to seamlessly update the associated ticket.



Method 3: Update from a Report

1. Identify reports with the RCA button/icon placed next to the drill-down button.
2. Click on the RCA button to update the ticket associated with this report.



Saving Changes:

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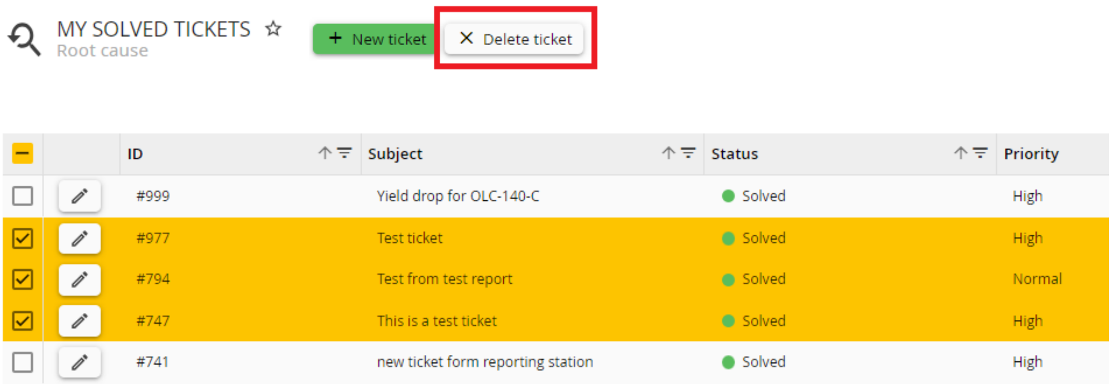
By employing these straightforward methods, you can easily keep your RCA tickets up to date with the latest information. If you receive an email or have a report with a link to an RCA ticket, opening it will automatically direct you to the "Following" ticket-list view and open the active ticket for your convenience.

Delete tickets

1. Single Ticket Deletion:
   - Click on the row of the ticket you wish to delete.
2. Multiple Ticket Deletion:
   - Click on the checkbox next to each ticket you want to delete.
3. After selection, locate the "X delete button" at the top left of the screen.
4. Click on the "X delete button" to initiate the deletion process.



5. A confirmation dialog will appear, providing a final confirmation for the deletion.
6. If the deletion is successful, a message will pop up, confirming the action.

By following these steps, you can efficiently delete individual or multiple tickets in the ticket-list view, ensuring a smooth and secure deletion process.

Ticket properties

When working with ticket creation and updates, understanding the properties is crucial. Here are key points to keep in mind about ticket properties:

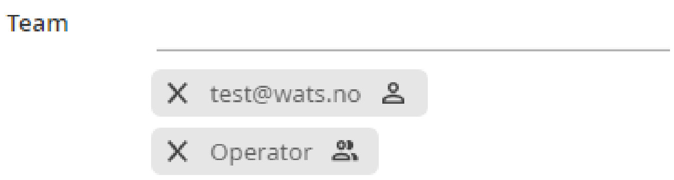
1. **Subject:**
   - The subject is the only mandatory field for a new ticket, limited to 100 characters.
   - It serves as the main title for existing tickets and is not editable after creation.

2. **Assignee:**
   - Assignee is optional during ticket creation but becomes mandatory for subsequent modifications.
   - Roles and Wats users can be assigned as assignee.
   - Assignee will automatically be added as team member.
   - Use the bell icon next to "Assignee" to send a reminder email to the assignee.

3. **Status:**

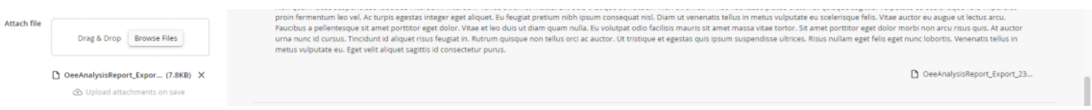
   - The status property is editable only for assigned and existing tickets.
   - On a new ticket, it is initially set to "New" and changes to "Open" upon assignment.
   - Status options include "On hold" or "Solved." If marked "Solved," all properties become uneditable until the status changes.

4. **Team Member:**
   - Team members can be assigned to any email, role, or Wats user.
   - Press Enter to add a member with an email or use the autocomplete feature for quick selection of roles and Wats users.
   - If a role is selected as a team member, users with the role will be displayed in a tooltip on hover.



5. **Progress:**
    - Initially set to "None" on new tickets and is not editable until the ticket has been created.
6. **Priority:**
    - Prioritize tickets as low, normal, or high to aid in determining immediate action.
7. **Reference Link for Tickets from Reports:**
    - Tickets created from reports include a reference link, providing options to navigate to the report or copy it to the clipboard.

8. **Attachments:**
    - Attachments can be added by drag-and-drop or browsing, with a total file size limit of 100MB.
    - Manage attachments easily by removing them with a click on the "X" and downloading by clicking on the file name.
    - After saving, the attachment will be located inside the content message along with the saved server message.



Saving Changes:

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Messages and progress tracking

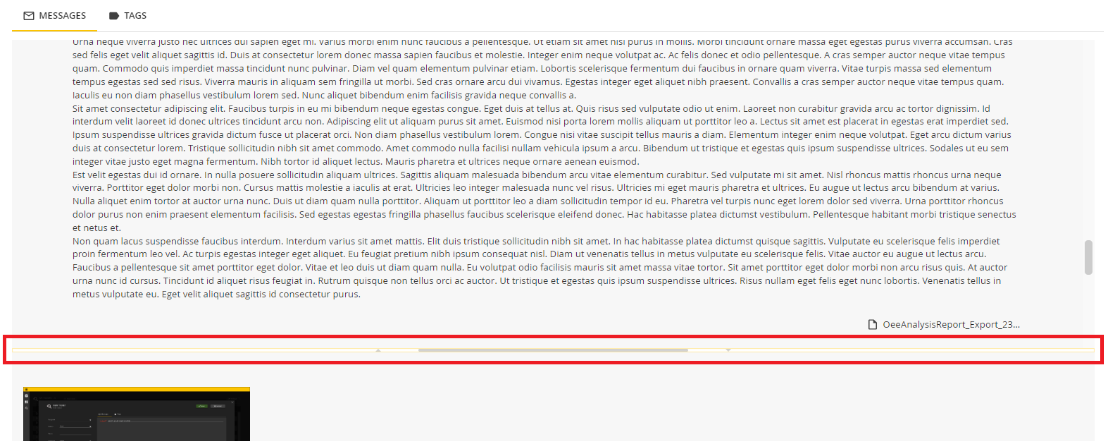
Following the Root Cause Analysis 8D's will help enhance your ticket management experience. Here are additional features within the text editor and progress tracking:

Text Editor Features:

- Messages, composed in the text editor, provide formatting options and image handling.
- Add images seamlessly by using drag-and-drop or browsing.
- Resize images easily by dragging on the edge of the image within the text editor.
- If status marked "Solved," the text editor will be hidden and resize disabled.

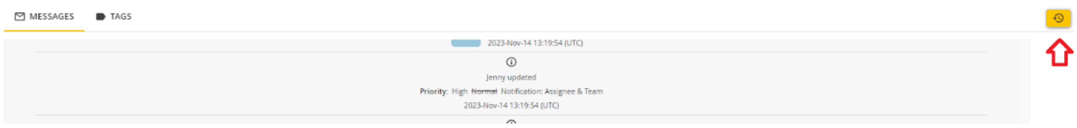
Text Editor Resizability:

- The text editor is resizable for convenience.
- To resize, simply drag on the splitter bar between the content and the text editor.



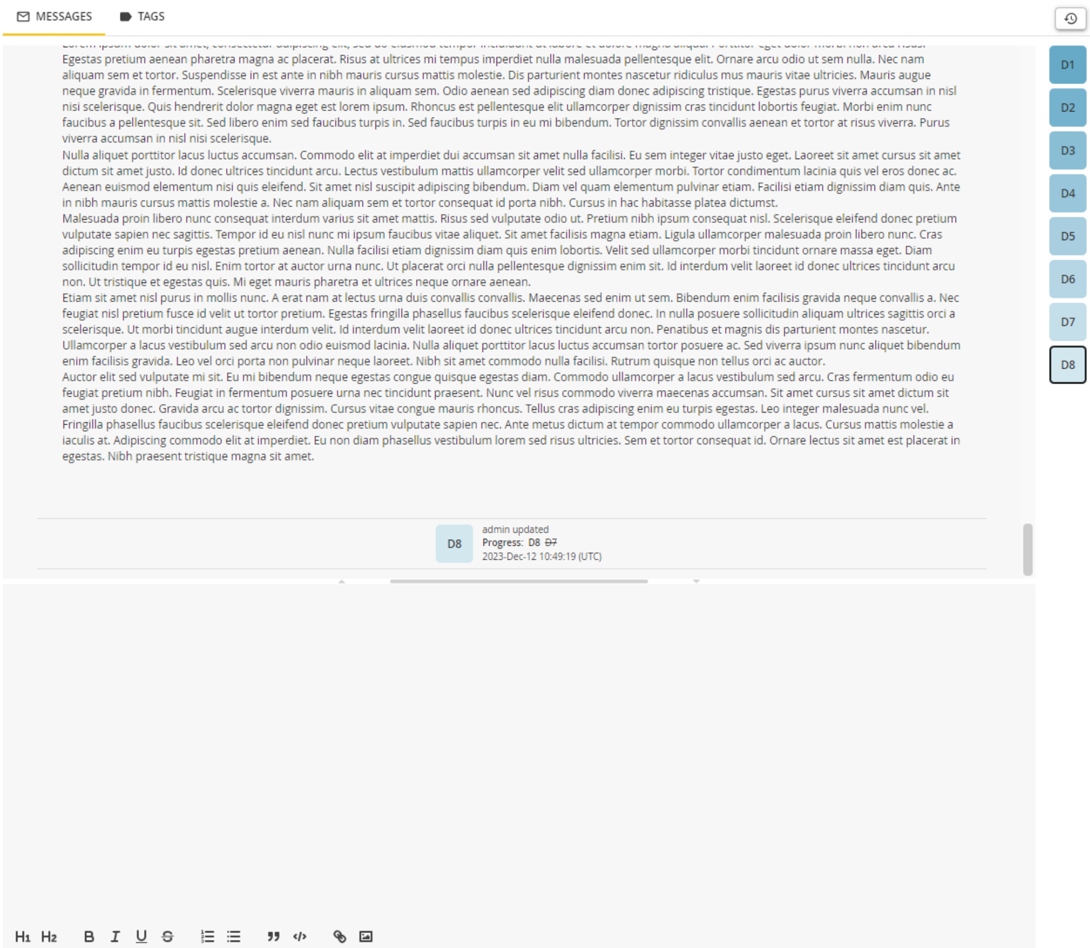
Update History:

- To view the update history, click on the history icon to access a log of actions taken on the active ticket.
- Action history logs properties, reminder notifications, and tags updates.
- Previous values are displayed with a line through them for easy tracking.



Progress Tracking:

- If progress has been updated, a progress tracker will be displayed on the right side of the message box.
- Click on the progress tracker to navigate to the selected progress.
- Hover over the progress to view details on who updated it and when.
- Each progress in the 8D's has its own shade, making it easy to distinguish.



Saving Changes:

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Following the Root Cause Analysis 8D's will aid in effectively managing your tickets and leveraging these valuable features for improved communication and tracking.

Tags

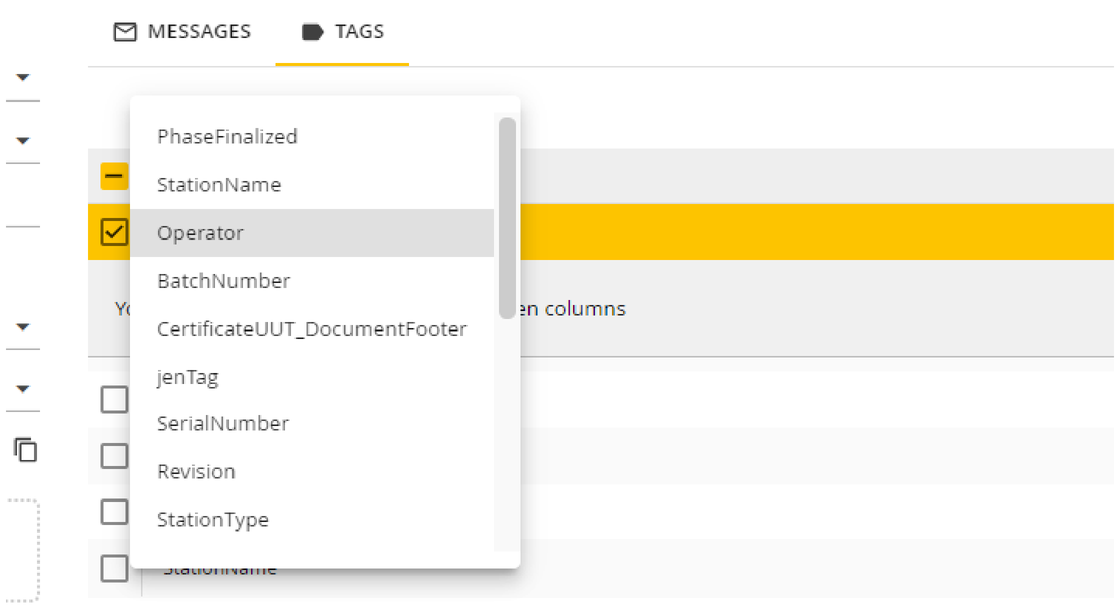
The Tags tab facilitates efficient tag updates, offering the flexibility to add predefined tags through the Control panel. In Asset Manager, access the Tag Manager to enhance your tagging capabilities. Follow these steps for seamless tag management:

Adding Predefined Tags:

1. Navigate to the Control Panel within Asset Manager.
2. Under Tag Manager, explore and manage predefined tags to suit your organizational needs.

Adding Tags in Ticket:

1. Access the Tags tab for the ticket you're working on.
2. To add tags, click on +Add, which activates the row edit mode.
3. In the dropdown menu, select the desired tag. A selection is mandatory.
4. Click "Done" to successfully add the chosen tag.



Updating Tags in Ticket:

1. Initiate the update by double-clicking on the desired tags row, which activates the row edit mode.
2. Click "Done" to successfully update the chosen tag.

Managing permissions

Permissions for the Root Cause Analysis (RCA) module, including the ability to **create** and **delete** tickets, can be assigned through the Control panel under Roles and Permissions. Two primary access levels are available:

1. Root Cause Module:

- **Scope:** Only access to own or assigned tickets.
- **Includes:**
    - Assigned to me
    - Following
    - My solved

2. Manage all tickets:

- **Scope:** Full management of all tickets.
- **Includes:**
    - Assigned to me
    - Following
    - My solved
    - Unassigned
    - Unsolved
    - Solved

Tailor your team's access to the RCA module based on their roles and responsibilities. The flexibility of these access levels ensures that individuals have the appropriate permissions to fulfil their tasks efficiently within the Root Cause Analysis module.