

Tracking software is often seen as a liability since it is typically only used as an accounting system where information is inserted into the system and certain key reports identify status. However software can also be use to stimulate participation, share information and automate administrative tasks. In this article we will review how we can automate tasks using the software to save key administrative time.

The Simplified Idea Management (SIM) software was designed with automation features that can automate many redundant tasks that you must to do manage an employee involvement process. A few of the possible options are listed below:

- ◆ Correspondence to submitters on status (this can be paper based of via e-mail)
- ◆ Correspondence to evaluators on ideas they are working on (this can be paper based of via e-mail)
- ◆ Spell checking
- ◆ Screen reminders when certain steps are performed
- ◆ On-line systems can have routing of evaluators and other people automatically ask for the next person to review an idea (when the current one is finishing their work)
- ◆ Open evaluators can be automatically closed at certain key steps in the idea process
- ◆ Award payments for standard award payouts (e.g., 10% of savings is paid as an award)
- ◆ Award calculations can also be handled on a custom basis to automatically calculate awards based on criteria entered into SIM (e.g., a payout table or matrix for points awards based on savings)

Most automation features are set up on the automation screen (via UTILITIES-CUSTOMIZATION in the SIM administrator module). Examples of automated options are included with a standard SIM software installation (except they are not active because the OPTION ACTIVE box is unchecked). Our technical support staff can help you set up an automation feature – call us at (520)527-0002.

Below we will set up a note to be automatically displayed when an idea is implemented. We are creating an entirely new entry that is similar to the MESSAGE-NEW ENTRY item that already may be on your list of AUTOMATED OPTIONS:

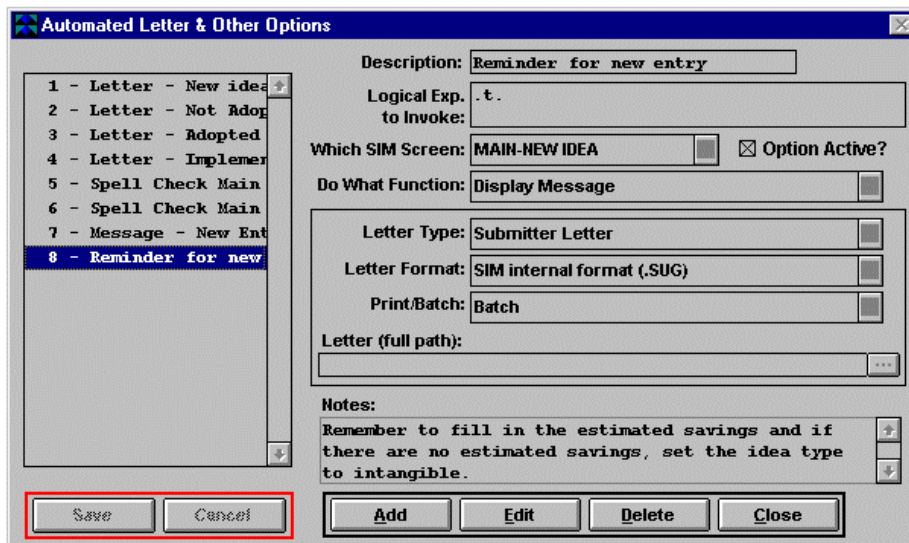
- 1) Select the UTILITIES-CUSTOMIZATION-AUTOMATED OPTIONS option from the menu in SIM.
- 2) Click on ADD
- 3) For a DESCRIPTION enter: Reminder for new entry
- 4) For LOGICAL EXPRESSSION TO INVOKE enter: .t.

There are a wide range of logical expressions that can be used to cause different actions to be taken. Technical support will be happy to help you set up this part of the screen.

- 5) For WHICH SIM SCREEN – select MAIN – NEW IDEA.

The options are:

- a) MAIN - For an existing idea
 - b) MAIN-NEW IDEA – When entering a new idea
 - c) CLOSE/AWARD - Award statistics
 - d) TRACKING - For evaluators, implementors and other people we are tracking – this is when a specific person’s entry is saved
 - e) TRACKING – CLOSE - Similar to TRACKING except it is when we exit the TRACKING screen
 - f) AWARD/RECOG – NEW ENTRY - For the award & recognition module
 - g) SIM SOFTWARE SHUTDOWN – Action when SIM is being shutdown (e.g., a backup).
 - h) NOTES/ACTION ITEMS – After a note is entered action can be taken such as notifying the submitter a note as been added.
 - i) MAIN – PRE-NEW IDEA – This allows action to be taken before a new idea is entered. This could be used to preset information or display a note.
- 6) For DO WHAT FUNCTION – Select DISPLAY MESSAGE (a box will appear identifying that the note may only be 150 characters, including spaces, long).
- 7) Under NOTES – Type in the note: Remember to fill in the estimated savings and if there are no estimated savings, set the idea type to intangible.
- 8) Now SAVE this entry. Below is how the saved item (number 8 on the list) may look in SIM. Please note that your list of other automation items (1-7) may be different than that shown, depending on how your software is currently configured.



- 9) Try adding an idea and the message will pop up automatically. In a similar manner we could have sent out a letter, given an award or performed some other task in SIM

NOTE: When setting up an automated option based on the date decision being filled in (or the idea being adopted) or the date of implementation being filled in, two separate automated option entries may be required in version 6.4 of SIM. This is because in version 6.4 it is possible to enter those dates on the main form or on the close/award screen so you will need to identify an entry for both screens. This also allows you to have slightly different automation options on both screens.

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