



Easy to Start. Easy to Use. Easy to Win.



Hertzler Systems Inc.®

# Identify Your Unique SPC Requirements

## Workbook

Company:

Location:

Completed by:

Date:



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1.

## Easy to Start:

- **Easy SPC Resource Kit** - [hertzler.com/journey](http://hertzler.com/journey)
- **Complimentary Trial** - [hertzler.com/trial](http://hertzler.com/trial)
- **Implementation** - [hertzler.com/implement](http://hertzler.com/implement)

## Easy to Use:

- **Training** - [hertzler.com/training](http://hertzler.com/training)
- **Using** - [hertzler.com/coaching](http://hertzler.com/coaching)
- **Adapting** - [hertzler.com/tuneup](http://hertzler.com/tuneup)

2.

## Easy to Win:

- **Level 1: "Guard"** - [hertzler.com/guard](http://hertzler.com/guard)
- **Level 2: "Guide"** - [hertzler.com/guide](http://hertzler.com/guide)
- **Level 3: "Gain"** - [hertzler.com/gain](http://hertzler.com/gain)

# Identify Your Unique SPC Requirements

The best advice may have come from the grizzled old man who said,

“ I’m not worried about getting finished,  
I’m worried about getting started. ”

Contents	Pages
Exercise 1 - What’s Your Win? Identify Your Desired Level of Impact.....	4-7
Exercise 2 - Identify Functional Areas of Application .....	8-9
Exercise 3 - Identify Key Stakeholders and Their Needs.....	10-15
Exercise 4 - Other Process Considerations .....	16-17
Exercise 5 - Information Technology Considerations .....	18-19
Exercise 6 - SPC Software Buying Guide .....	20-25
WebEx Demo .....	26-27

Should you have any questions while using this workbook,  
please feel free to contact us.



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## What's Your Win? Identify Your Desired Level of Impact

### 1. Guard

Increase or maintain revenue while realizing some margin improvement. Our "Data Heads" call these "Scooter" margins because the difference between cost and return is something that you could comfortably drive a scooter through.

Improve customer satisfaction through quality inspection. We call this the "Guard" stage of the journey because your primary concern is guarding the customer and your brand from mistakes and problems.

### 2. Guide

Begin to increase operational capacity, reduce material and labor costs, improve inventory turns. We call these "Bulldozer" margins because you're steadily moving a lot of ground during this early stages of a potentially much larger transformation.

Improve productivity by shifting from "inspection reporting" to "process control". We call this the "Guide" stage because you begin to guide your team as they anticipate problems. You begin asking "Is the process stable?"

### 3. Gain

Significantly increase operational capacity, reduce material and labor Costs and improve inventory turns. We call these "Galactic" returns because these efforts can produce very significant bottom line results.

Transform your operations by shifting from "process control" to team driven continuous operational improvement. We call this the "Gain" stage because this is where your organization makes significant strides toward peak performance.

**Begin with  
the end  
in mind...**

*Exercise continued  
next page...*



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## What's Your Win? Identify Your Desired Level of Impact

### 1. Guard

#### You'll need to:

- Customize workflow to meet operator requirements
- Automatically digitize data
- Give instant real-time alarms to all stakeholders
- Store data in central repository
- Easily create customized Certificates of Analysis
- Have options for rich and thin client data collection
- Data entry in both forms and via guided process
- Easily review data and provide proof to customer if a complaint arises
- Interface to any gage, text log file, data base

#### You'll need to:

- Train and empower users
- Have user configurable alarms for all Western Electric controls tests
- Use real-time control charts
- Use dashboards to communicate status of current state graphically or in tabular format
- Set anchor points to signify a shift in the process
- Right click on charts to get to underlying data and notes
- Use statistical filters to focus on performance and exceptions

### 2. Guide

### 3. Gain

#### You'll need to:

- Utilize data brushing to let you visually zero in on key data points
- Configure your database hierarchy so it models business structure
- Compare and contrast any combination of part, process, and test values
- Filter/sort by various tags, on the fly, to the nth level
- Identify the sources of variation without having to manually investigate each interaction
- Drill-Down to identify the factors that are generating the most defects (e.g. Machine x on Shift y)
- Leverage configurable dashboards to focus attention on the critical opportunities for improvement
- Chart Quality and Performance (up/downtime) by cost

Which level of impact would be best for your organization?

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## FUNCTIONAL AREAS

GainSeeker Suite users deploy the system in many creative ways. Here is a list to stimulate your thinking about how real-time data might benefit your company.

### Manufacturing Quality

- Dimensional (height, weight, thickness, etc.)
- Cycle times to perform tasks
- Process parameters (temperatures, feed speeds, etc.)
- CMM/ Vision data
- Visual defects
- ATE data
- First pass yield

### Quality Laboratory Data

- Analytical test results
- HACCP data

### Regulatory Compliance Data

- Net contents management and over pack (give away) data
- EPA Compliance Data

### Overall Equipment Effectiveness (OEE)

- Efficiency
- Uptime / Downtime
- Quality, First pass yield



#### Environmental Data

- Corporate Sustainability Reporting data
- Energy used
- Use of landfill

#### Financial Performance

- On time delivery
- Dollars in inventory
- Dollars in WIP
- Revenue
- Net sales

Which are the top three opportunities for your company?

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## KEY STAKEHOLDERS

Key Stakeholders are the individuals and groups of people who are somehow affected by the SPC software deployment. Here are some broad categories:

- Executive and operations leadership
- Quality, engineering, production leadership
- Line supervisors
- Quality engineers
- IT staff (see Information Technology Considerations)

## ROLES

There are five SPC software Roles to consider for a successful deployment. For a discussion of the training suggestions for each of these roles, please visit:

<http://www.hertzler.com/roles>.

The **Deployment Champion** is responsible for the overall SPC software deployment at all of the company's facilities. The Champion sets priorities, cuts red tape, allocates resources, and holds staff accountable for the success of the deployment.

The **Technical Lead** is responsible for developing technology to optimize the SPC software deployment. This includes developing data entry templates, planned sessions, desktops, dashboards, and filters as needed to enable others to do their jobs as effectively as possible. The Technical Lead usually provides first line of support for troubleshooting, and establishes policies and ensures they are maintained across the organization.

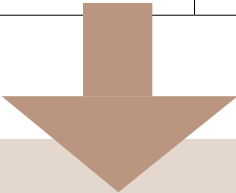
The **Administrator** is responsible for intermittent system maintenance activities. These include managing user access (profiles, rights, adding, changing or removing users), adding new products (Standards and processes), and collaborating with the Technical Lead to identify required templates, planned sessions and so forth.

The **Analysts and customers of the data** (Plant Managers, Quality Managers, Engineers, Team Leaders, Operations Staff, and so forth) are responsible for maximizing the value of the data.

The **Front-line data entry staff** are the people responsible for entering data. Their training is usually delivered by the Technical Lead when specific solutions are deployed. Since most data entry solutions are customized for a specific application, training is fast-usually completed in 5 or 10 minutes.

Who has a stake in the SPC software deployment?

Name / Group	Position	Interest in SPC Software	SPC Software Role



Before proceeding with the project/s due diligence, meet with each stakeholder to gain agreement on Exercises 1 and 2.



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## STAKEHOLDER NEEDS

For each Stakeholder or Stakeholder Group, consider these questions:

### Outputs

Considering the charts, dashboards, reports you have today, what is working well? What do you want to make sure you retain from your current processes, even as you change and grow?  
*Include samples, if possible.*

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What new charts, dashboards, or reports would be useful for your situation?

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What are similar companies implementing that might be best practices you'd like to emulate?  
*Feel free to attach hand drawn sketches, or prototypes mocked up in a drawing or presentation program.*

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What level of granularity of data does this stakeholder need? \_\_\_\_\_

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What drill down and analytical capabilities does this stakeholder need?

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What devices does this Stakeholder use, and how should they get the information from SPC software? Some options are large flat panel display, mobile (smart phone or tablet), web browser, interactive charts? \_\_\_\_\_

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What other systems might we need to send information to?  
(Excel, PowerPoint, Minitab, Email, text message, etc.)

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For sample dashboards, please visit:  
<http://www.hertzler.com/php/products/gainseeker/dashboard.php>.

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## Inputs

For each output, what is the source of each data point presented?

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Is current system paper or computer based?

- If paper, please provide sample inspections sheets.
- If computer, which system?

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What is the frequency and volume of data?

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What is the product mix?

- High volume / Low Mix
- Low Volume / High Mix
- Lot size of 1?

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Availability of electronic data sources such as RS232, USB gaging?

*Please provide brands and models if possible.*

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Availability of direct machine interfaces such as OPC/PLC

- OPC server already in place?
- Data already exists in a tag or will need additional programming? \_\_\_\_\_

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Data from CMMs or vision systems?

- How many variations of data output are currently in existence?
- Please provide sample data files \_\_\_\_\_

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Data already in flat text files or other data systems? \_\_\_\_\_

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What user interface is best for this stakeholder?

- Form-based (HTML) • Guided, question-based (template)

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Our standard information (ID, specifications, sample size, real-time checks to perform, etc.) available externally? How important is it to extract that directly to GainSeeker Suite?

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If there is a user interface for data entry, how does the user start data entry: from a workstation-specific icon or from one or more general menus? \_\_\_\_\_

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- [illegible]

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## Integration with EQMS & ERP

Trigger SPC software data collection at start or end of ERP processing step \_\_\_\_\_

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Extract traceability data from ERP for use in SPC software data records \_\_\_\_\_

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Extract product IDs to create SPC software Standards \_\_\_\_\_

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Extract production schedule for use in SPC software \_\_\_\_\_

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Extract scrap/defect data from ERP system to SPC software for dashboards and analysis

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Extract OEE data from ERP system to SPC software for dashboards and analysis \_\_\_\_\_

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Extract on-time delivery data from ERP system to SPC software for dashboards and analysis

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Feed scrap/defect data collected in SPC software to ERP System

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Feed OEE data collected in SPC software to ERP System

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Feed on-time Delivery data collected in SPC software to ERP System

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## PROCESS

How important is compliance with targeted time for data collection?

(Need alerts if check is late? Visual cue that check is due?) \_\_\_\_\_

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Types of real-time alarms needed? (i.e. out of control, runs, trends, out of spec, and other Western Electric rules.) \_\_\_\_\_

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What standard operating procedures already exist for responding to real-time alarms?

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What new procedures would you like to implement?  
(i.e. email, text message, screen color change)

- Who should be notified?
- How should they be notified?
- What are your expectations for how they should respond? \_\_\_\_\_

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Document delivery of work instructions, quality alerts, drawings, videos, etc? \_\_\_\_\_

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## INFORMATION TECHNOLOGY CONSIDERATIONS

How are operations going to access your software? (workstation, remote session, windows tablet, other tablet.) \_\_\_\_\_

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How are you going to host your software? (Local server, Citrix Terminal Services, or Cloud)

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If Citrix:

- Re-map RS232 ports?
- Stand-alone PCs or thin clients?

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Data type (SQL Server, Oracle, MySQL, Pervasive?) \_\_\_\_\_

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Who is the IT contact? \_\_\_\_\_

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What are your backup policies and procedures? \_\_\_\_\_

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What are your policies for establishing a development and test environment versus a production environment? \_\_\_\_\_

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Number of seats needed for pilot? \_\_\_\_\_ Initial order? \_\_\_\_\_ Long-term? \_\_\_\_\_

- Need for reserved users?

\_\_\_\_\_

\_\_\_\_\_



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## SPC SOFTWARE BUYING GUIDE

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Data Visualization & Charting	GainSeeker	Comparison
Control Charts (X-bar/R, X-Bar/Sigma, X/MR, 3-D showing between and within variation, etc.)	•	
Histograms, Combination Chart, Scatter, Trend, EWMA, Moving Average, Time Axis, CUSUM, Group Chart, Box and Whisker, Paired Sample Analysis, etc.	•	
First Pass Yield Charts, DPU Charts, P, NP, U, C, Pareto Charts, Bars, by Cost, Sigma, etc.	•	
Statistical lists and tables, Report Writer, Data Table	•	
Crystal Reports-style Report Writer	•	
Automatic Non-normal analysis for accurate distribution modeling	•	
Statistical filters (e.g. show all products w/ Cpk < 1.33)	•	
Dashboards including dials, gages, bars, grids, and text	•	
Unique group data function (filter/sort by various tags on the fly) to the nth-level	•	
Unique Variation Wizard to automatically identify the sources of variation in a system	•	
Unique Drill-Down Wizard to identify the factors that are generating the most defects (e.g. Machine x on Shift y)	•	
Easily customize HTML output	•	
Send information to HTML, JPG, XML, text files, clipboard, external databases, email, etc.	•	
Easily share information with MINITAB, JMP, and other statistical packages	•	
Integrated MINITAB charts from within GainSeeker	•	
Frees Six Sigma practitioners from the "data shuffle"	•	
Easily customize reports	•	
Easily change fonts, colors, line types, etc.	•	
Over 30 pre-defined date ranges (today, yesterday, last month, current month, current year, etc.)	•	
Define chart titles, with the option to include statistics in the headers	•	
Customizable dashboard "skins"	•	
Overpack Analysis wizard predicts cost savings in fill and coating operations	•	
Data Brush makes it easy to visually isolate and drill into data	•	
Tablet / Mobile dashboards and charts deliver data anywhere	•	
Combined control charts & data table	•	



Data Analysis & Control Limits	GainSeeker	Comparison
Generate queries to the GainSeeker database using point-and-click without having to know SQL	•	
Easily analyze data from other sources (spreadsheets, the clipboard, PLC databases, etc.) without having to re-save it in GainSeeker	•	
Compare and contrast any combination of process values	•	
Compare and contrast any combination of part values	•	
Compare and contrast any combination of test values	•	
Compare and contrast any combination of any mix of process, part, and test values	•	
Normalize data for many factors so you can compare different value ranges on the same chart	•	
Measurement system conversion (English/Metric or customize)	•	
Right-click on dashboards to view the data and charts behind the gages	•	
Wiki-style documents and notes enable collaboration when viewing charts	•	
Routine tasks can be automated	•	

Control Limits	GainSeeker	
Fixed/historical limits	•	
Dynamic limits (auto-recalculate after n data points collected)	•	
Option to show both fixed and dynamic limits to view how the current data set's control limits compare to the historical limits	•	
Limits calculated differently if subgroup size varies (Variables/measurement data and Attributes/defect data)	•	
Limits based on process, part, and test	•	
Option to calculate control limits filtered by tag information (machine, shift, etc. or any combination of traceability)	•	
Ability to set anchor points to signify a shift in the process	•	
Easily switch to Short Run calculations (Standardized, Target/Nominal, and Short Run)	•	



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Data Entry	GainSeeker	
Interface to electronic gages, any CMM, scales, micrometers, PLC networks using OPC, TCP/IP, DDE, RS232, USB, files, etc.	•	
Two-way interface to any RS232 device, PLC, OPC, TCP/IP, DDE, files, database, etc.	•	
User-definable data entry procedures for Tablet / Mobile devices	•	
Unique File Import Wizard allows you to drag and drop columns in a file into GainSeeker	•	
Unique Database Integration Wizard allows you to drag and drop columns from any table in any database	•	
Interface to multiple data sources simultaneously (ERP, MES, PLC database, LIMS, etc.)	•	
Easy integration with existing systems. For example query a scheduling system to present a list of jobs to the operator	•	
Integrated document delivery system supports over 200 file formats (HTML, JPG, PDF, videos, sound, documents, etc.)	•	
Automatically changes engineering drawings and photos when a part changeover occurs	•	
On-line access to recipes, drawings, SOPs, training videos, and work instructions provides a paperless system	•	
Unique universal data collection templates are data-driven, i.e. they can be used with any combination of processes, parts, and tests	•	
Handles both production and lab data	•	
Handles descriptive, measurement, and defect data from one interface	•	
Over 300 command functions (math, string, database, etc.)	•	
Real-time visibility and alarms into HMI/SCADA systems, with statistical alarms	•	
Support RFID devices for easy identification of data	•	
One program to interface to all devices (don't need separate software for each device)	•	

Real-time	GainSeeker	Comparison
Configurable alarms (runs, trends, out of control, etc.)	•	
Configurable alarm delivery (message box, HMI interface, email, pager, cell phone, TCP/IP, etc.)	•	
Real-time alarm notification (e.g. emails sent when alarm happens)	•	
Configurable alarm colors (red for spec, purple for control, etc.) and message text	•	
Choose to display alarm colors on note dialogs, on charts, on dashboards, on the Database Monitor, etc.	•	
Ability to force operator to enter a note or select a reason/cause/event/action taken	•	
Closed-loop feedback to external devices	•	
Monitor external databases for real-time failures without having to re-save the data within GainSeeker	•	
Collect and calculate OEE data	•	
Monitor overpack or give-away for net weight and fill weight applications	•	
Real-time visibility into plant-floor operations	•	
Real-time visibility into supply-chain network	•	

Administration	GainSeeker	Comparison
Configurable user interface (charts to view, data grids, statistics displayed, colors, fonts, colored sigma zones on charts, etc.)	•	
Match operator work flow so that operator training typically only takes 5 to 15 minutes	•	
Define a list of "favorites" to quickly access the most commonly used processes, parts, and tests	•	
Easy job setup for administrators to assign tasks and pre-select traceability tags	•	
Corrective action traceability	•	
Archive data by date range or count to XML, CSV, or binary formats	•	
User rights define which sections of the system are available based on login name	•	
Specify "reserved users", which guarantees login access	•	
User rights define who may change or delete data	•	
LaunchPad provides access to all modules	•	
Built-in timers run tasks automatically, inform operators when to collect data, refresh charts, generate HTML or JPG, etc.	•	
Audit Trail database tracks changes and deletions, allows searches and reports, and supports restoring deleted data	•	



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Database Design	GainSeeker	Comparison
Hierarchy support allows you to define the database o match your corporate structure (division, plant, group, line, etc.)	•	
Set up an enterprise database or join data from multiple plants	•	
Flexible relational database optimized for speed	•	
System doesn't bog down after significant amounts of data are entered	•	
Mass duplications and updates (e.g. change subgroup size from 5 to 3 for test X) for any process, part, and/or test	•	
Easily track and report on lot genealogy	•	
Subgroup size 1 - 72	•	
Set up over 50 traceability tags per configuration	•	
Unlimited data storage	•	

Architecture	GainSeeker	Comparison
Run on a Windows rich client	•	
Run on a thin client (Citrix or Terminal Server)	•	
Run on Apple (iOS) and Android tablet and mobile platform	•	
Delivery via hosted (SaaS) or client server	•	
Run on a web browser	•	
Supports Microsoft SQL Server, Oracle, MySQL, Pervasive/Btrieve, and other ODBC-compliant databases	•	
Generate HTML or JPG dashboards and control charts from a server for distribution without using a GainSeeker license or requiring IIS	•	
Built-in VBA tools for maximum flexibility and customization	•	
API exposed to allow external programs to control the system via OLE Automation (COM/DCOM)	•	
Supports FDA 21 CFR Part 11 (audit trail, password control and aging, etc.)	•	
Supports HACCP requirements	•	
Supports different language and numeric formats, e.g. 100,000.23 vs. 100.000,23	•	
Collect data locally if the network temporarily goes down	•	
Help desk tools for remote password reset or account unlocking	•	

Technical Support	GainSeeker	Comparison
Phone	•	

Web-based	•	
Remote control using WebEx	•	
Access to network, database, statistical, training, and implementation staff	•	
Talk to the actual developers to discuss new features and product enhancements	•	
Emphasis on technical expertise, not marketing glitz	•	
User-group meetings	•	
Public and private training classes	•	
Web-based training	•	

Company	Hertzler	
You're treated as a partner, not a number	•	
Has been in business for over 30 years with many long-term customers	•	
Focused on your success by providing solutions	•	
Ability to work with you on in all areas - strategy, culture, and tools	•	



### Next Step:

Once these steps are completed, advance to the  
"Making the Business Case" - ROI Guide.



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We make it really easy to try in just 3-Steps:

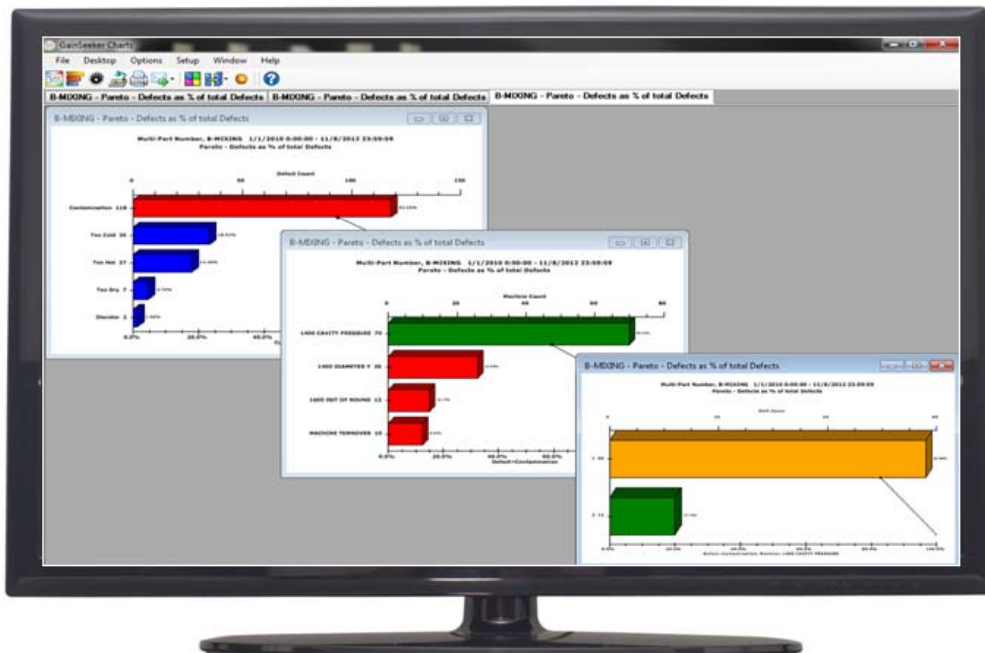
1.

Schedule your Demo - call # 800-958-2709 x 3

2.

We'll send you a WebEx invite along with pricing and brochure

- Duration is usually 60-90 minutes.
- As many people as you wish; anywhere in the world
- Tailored to your needs - Hertzler customizes training to the unique needs of the SPC software deployment roles. Other companies only provide a generic program.



3.

Take your next step to becoming a world class manufacturer.

### What you will see:

- Our capabilities
- Examples of problems we solve
- Examples of how these world class manufacturers are using GainSeeker
  - Snyders
  - Crown
  - SmokerCraft
  - and other World Class Companies

### Industries:

- Food
- Electronics
- Automotive
- Aerospace
- Plastics
- And more...

*“ I’m not worried about getting finished, I’m worried about getting started.”  
Get started by identifying your company’s unique requirements.”*



## **Hertzler Systems Inc.<sup>®</sup>**

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