

# Adding Lessons



New lesson

By clicking the element you can open a Lesson Adding Card. It is the same for each employee, and is displayed as follows:

[← Back to lesson list](#)

### New lesson

Lesson name \*

Enter the lesson name

?

Category

What was expected to happen\*

What was planned, or how it should normally happen

What actually happened\*

Please describe what actually happened as compared to what was expected: It might be better – It is a positive experience or worse - It is a negative experience. The more details you provide the better.

What are the root causes of the incident

Proper root causes indicate a faulted process or deflectable behaviour. Try to avoid logic fallacies, assumptions, slogans and common reasons as "lack of time, lack of people, lack of resources"

Select

What can you learn from this situation\*

If the experience is negative, give recommendations that can help to avoid the same situation in the future. If the experience is positive, give recommendations that can help to replicate success.

Improvements. In your opinion, what should be improved to avoid the same in the future? What should be changed, and who should change it?

1.



Enter proposed improvements or changes. Proposals should address changes in processes, policies, procedures, approaches, etc. Tasks are formed, and improvements are implemented based on such proposals.

+ ADD

How this situation affected your organization?

Your comment

Enter description

Sources of additional information

Specify documents, IT-systems or other media providing additional information on the incident.

Contact persons for further details

Specify employees who can provide additional information on the lesson

Additional materials

 Select

Add coordinators

SELECT >

Parallel matching

Add approver

SELECT >

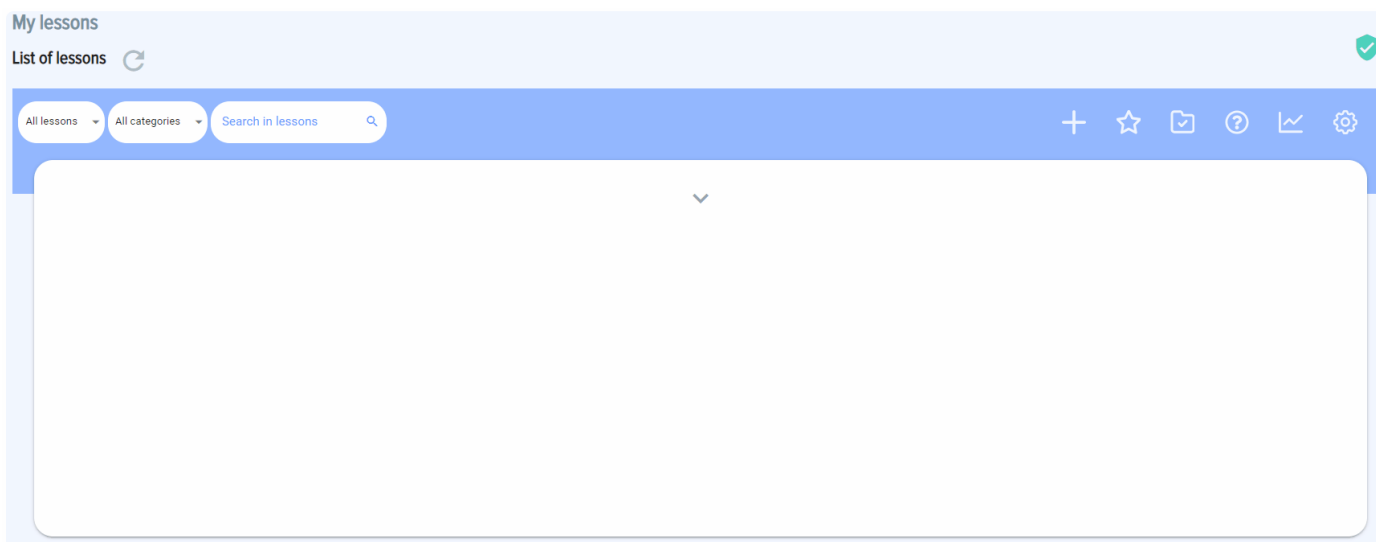
Tags

Enter tags separated by commas

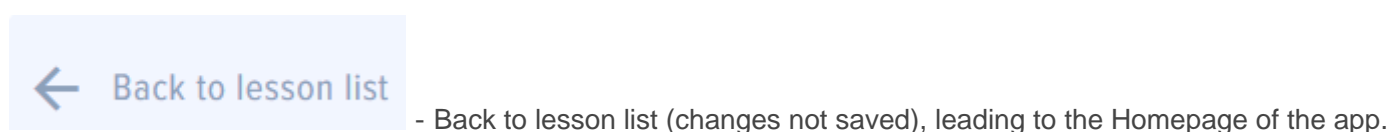
SAVE DRAFT

ADD FOR COORDINATION

CANCEL



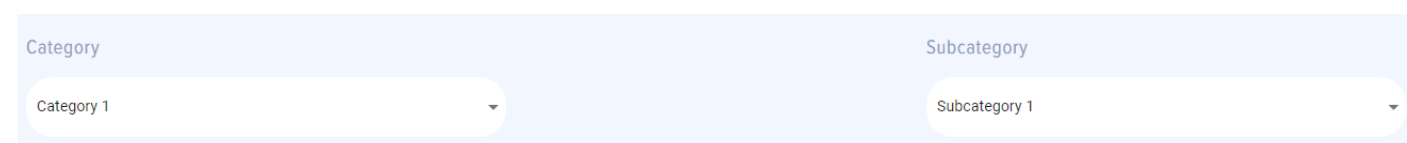
The card contains the following fields:



**WARNING! Please note that by clicking “Back” in your browser you quit the app and go back to your Ritrix24, but not to the previous page of the App**



field. Please give the name in a form easy for people to find it later. Avoid letters and numbers (e.g., “Lesson A21”).



- category and subcategory of the lesson. Categories and subcategories are set by the app moderator in the [app settings](#).

This field can be viewed on the lesson card only when categories and subcategories are set by moderator through the app settings.

Each category can be set with a [coordination route](#) or added with employees who are to coordinate the lessons. Coordination modes can be selected in the app settings (see App Settings section).

If a category without set coordination routes or employees added is selected, nothing happens, and an employee should add coordinators and approves manually.

If a category is set with a coordination mode, a pop-up notification for a mode selection is displayed.

If you select “Appointed by me”, an employee should add the coordinators and the approver manually on the lesson adding card.

If “Add a coordination mode” is selected, the employees added by the moderator when setting up the app are automatically added to the lesson adding card (namely, to the card section intended for adding coordinators and approvers).

### What was expected to happen\*

What was planned, or how it should normally happen

- “What was

expected to happen” field. Here is to describe what was planned, or expected as per the normal course of business.

### What actually happened\*

Please describe what actually happened as compared to what was expected: it might be better – it is a positive experience or worse - it is a negative experience. The more details you provide the better.

- “What actually happened” field. Here is to describe what happened in fact, what the deviance from a planned result was.

### What are the root causes of the incident

Proper root causes indicate a faulted process or deflectable behaviour. Try to avoid logic fallacies, assumptions, slogans and common reasons as “lack of time, lack of people, lack of resources”  
Select

- “Root causes” field. One of the key blocks. Featuring the selection of one of the given causes in accordance with the lean production concept. You can also select “Other” option, and enter your cause into the empty field. In order to identify the root cause, we recommend applying the “5 Whys” technique. Please note that, as a rule, the root cause should lie within the area of processes, or systems. Employees often identify the causes as lack of resources, including funds, workforce, time, etc. Before solving the problem through additional resourcing, the existing resources need a maximum optimization.

The app moderator can edit the pre-set root causes in the [app settings](#).

### What can you learn from this situation\*

If the experience is negative, give recommendations that can help to avoid the same situation in the future. If the experience is positive, give recommendations that can help to replicate success.

- “Lessons” field. As long as the lesson learned is not implemented in practice (i.e. as long as no changes occur based on the lesson learned), a lesson learned from a similar business/project should be considered. This field is

to describe everything that should be kept in mind when carrying out similar activities so as not to make the same mistake.

Improvements. In your opinion, what should be improved to avoid the same in the future? What should be changed, and who should change it?

1.

Enter proposed improvements or changes. Proposals should address changes in processes, policies, procedures, approaches, etc. Tasks are formed, and improvements are implemented based on such proposals.

- “Proposed improvements” field. Here is to describe improvements proposed. Based on these proposals, tasks for implementing the improvements are formed. Please note that an employee might not see the big picture, particularly in the event of cross-functional processes. Therefore, the right employees are required to be assigned as coordinators.

For adding several tasks, click the plus symbol. For deleting the proposed improvement, click the “X” symbol.

How this situation affected your organization?

- consequence

assessment. This estimate is solely provisional.

The app moderator can edit the pre-set consequences in the app settings.

Your comment

Enter description

- field for entering

additional comments on the consequences.

Sources of additional information

Specify documents, IT-systems or other media providing additional information on the incident.

- this

field is for specifying the documents or any other media, if applicable, where additional information on the incident, process, system, project, etc. can be found.

### Contact persons for further details

Specify employees who can provide additional information on the lesson

- employees that can

be contacted for additional information on the lesson.

### Additional materials

 Select

Additional materials

- here you can

attach any relevant files to the lesson.

Add coordinators

SELECT >

Parallel matching

Add approver

SELECT >

-  
this section is for assigning coordinators and an approver to the lesson. You can choose any employees.

The coordination level depends on the lesson. If a lesson is approved by a collective body, they can be assigned as coordinators, and the chairperson of the body can be assigned as an approver. See [App Roles](#) section for further details.

You can select a concurrent or sequential coordination mode. If concurrent coordination is selected, the lesson is sent for coordination to all employees. If sequential coordination is selected, the lesson is coordinated in the sequence defined by an employee's position on the list of coordination.

If a category / subcategory with a set group of coordinators is selected, such coordinators are added automatically when selecting a relevant category / subcategory.

In addition, you have an option of deleting any of the employees added automatically and adding any other employee, as well as alter the sequence of the employees if sequential coordination mode is selected.

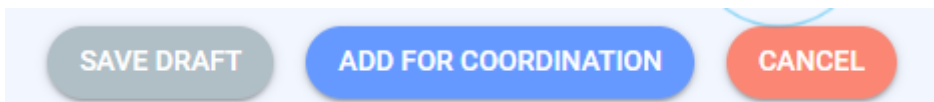
Upon adding a lesson for coordination, an employee gets a notification (bell symbol) both in Bitrix24 and in Message Feed if the employee is chosen as a coordinator or an approver.

### Tags

Enter tags separated by commas

- tags are keywords that can be

used for searching and filtering lessons.



- active elements.

- “Save” - button for moderators who can edit the lesson at any stage of its editing. The stage is not changed when you use this button for saving. E.g. if the stage is “On approval”, the same status is maintained after editing, while “Save draft” button resets the stage to the initial one, and coordination marks are unselected. The contents of the lesson, including the coordinators and the approver, are maintained in both cases.
- When clicking “Save draft” button, the lesson is saved as a draft without being sent for coordination. It is available for its author if clicking “My lessons” from Homepage of the app, as well as in the general list of lessons.
- When clicking [“Add for coordination”](#) button, the lesson is sent for coordination to the employees added by the author of the lesson. The lesson is simultaneously sent to all coordinators.
- When clicking “Undo” button, the lesson is uncreated. If the lesson has already been created, the button undoes the latest changes.

The lesson card is accessible from the Top Menu of the app by clicking the name of the lesson.

A lesson card is as follows:

[Back to lesson list](#)

Name Surname

ON COORDINATION

Lesson "Урок: My lesson 5"

Category/Subcategory

Category 1 / Subcategory 1

What was expected to happen

Something

What actually happened

The plan was not submitted on time

What are the root causes of the incident

Unnecessary actions. Unnecessary actions by the employees in the workplace, in the working process, in search of guidelines and instruments

What can you learn from this situation

Performance improvement

Improvements. In your opinion, what should be improved to avoid the same in the future? What should be changed, and who should change it?

1) My improvement

How this situation affected your organization?

Saving / extra income of up to 10,000 USD per year

Your comment

Sources of additional information

Contact persons for further details

Coordinators

user A

Approver

User B

Tags

History

COORDINATE

SEND BACK FOR REVISION

Comments

Name

B

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U

\$

SAVE

“History” element displays all actions with the lesson. History is recorded automatically.

“Coordinate” function is available to a coordinator only; the lesson is coordinated by the employee.

When clicking “Send back for revision”, a pop-up window is displayed:

Comment

Add your comment

Add your comment

COMPLETE

CANCEL



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Revision #7

Created 15 October 2024 07:11:28 by Maria

Updated 23 October 2024 13:51:45 by Maria