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# **Agile Product Lifecycle Management**

Product Quality Management User Guide

v9.3

Part 12821-01

June 2009

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# Preface

The Agile PLM documentation set includes Adobe® Acrobat PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

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**Note** To read the PDF files, you must use the free Adobe Acrobat Reader version 7.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) <http://www.adobe.com>.

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The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> can be accessed through Help > Manuals in both Agile Web Client and Agile Java Client. If you need additional assistance or information, please contact [support](http://www.oracle.com/agile/support.html) <http://www.oracle.com/agile/support.html> (<http://www.oracle.com/agile/support.html>) for assistance.

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**Note** Before calling Oracle Support about a problem with an Agile PLM manual, please have the full part number, which is located on the title page.

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## Readme

Any last-minute information about Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html>

## Agile Training Aids

Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html) [http://www.oracle.com/education/chooser/selectcountry\\_new.html](http://www.oracle.com/education/chooser/selectcountry_new.html) for more information on Agile Training offerings.

## Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

# Product Quality Management

**This chapter includes the following:**

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## Before you Begin

This manual guides you to use Agile Product Quality Management solution provided you have installed Agile PLM at your company. To install Agile PLM, use the appropriate installation documentation. To help you install Agile PLM and understand Agile objects, classes, their application and their working, refer to the manuals listed below:

- *Agile Database Installation Guide*
- *Installing Agile PLM for OAS*
- *Installing Agile PLM for WebLogic*
- *Getting Started with Agile PLM*
- *Agile PLM Administrator Guide*

Some common terms appear across all Agile PLM modules. For details, see the *Getting Started with Agile PLM* guide.

## What's New in PQM 9.3

Changes across Agile PLM 9.3 User Interface have created a few changes in the PQM module as well. Listed below are generic enhanced features and links, which lead you to detailed documentation on some of the commonly used features of PQM.

Enhanced generic features across Agile PLM:

- Preview pane replaced by Quick View: The Quick View dialog appears when you position the cursor on any object and allows you to view details of the object and perform some actions.
- Enhanced Add feature allows you to add/remove objects faster by either drag and drop option or the copy and paste option.
- Views and Personalize menu replace the filter option in the Web Client. See also: [Relationships Table](#) on page 42.

- The Edit Rule button is now available on the Relationships table and the Quick View dialog.

Commonly used features in Agile PQM:

- Creating a PSR from an Item: Icon changes. Views and Personalize menu replaces the filter option in the Web Client.
- Search for PSRs and QCRs: The Execute a Quick Search, Custom Search and the Advanced Search results returns PSRs or QCRs matching the set criteria. For details, see [Search for PSRs or QCRs](#) on page 24.
- Creating PSR using Save As: Additional features now allow you to reference existing files, create new copies of the file or does not include files, when you copy PSRs with Attachments. See Step 5 of the instructions of [Creating PSR using Save As](#) on page 22.
- Create a QCR from a PSR: Icon changes. Views and Personalize menu replace the filter option in the Web Client.
- Adding Items to the Affected Items tab of a PSR: You can add items to the Affected Items tab of a PSR using the Search/Create Button. See [Search to add](#) on page 30 to search for existing Items and [Create to add](#) on page 30 to create new Items. The enhanced Add feature allows you to add objects faster by using the drag and drop option or the copy and paste option. See also: [Adding Items to the Affected Items tab of a PSR](#) on page 30.
- Adding Objects to the Relationships tab of a PSR: Enhanced add features, the appearance of the Edit Rule on the Relationships table and also in the Quick View dialog message bar. See also: [Adding Objects to the Relationships tab of a PSR](#) on page 43. [Adding Relationship Rules](#) on page 46. [Editing Relationship Rules](#) on page 47.
- Viewing Quality issues a Customer and Supplier: Enhanced search results help you view Quality issues on PSRs, QCRs, Customers and Suppliers. See also [Viewing Quality issues against a Customer or Supplier](#) on page 17.

## An Overview of Product Quality Management

Agile PQM is a powerful solution currently in use across leading business organizations around the globe. It involves an innovative methodology used to track and manage data, which translates to (better products) enhanced quality, productivity (lesser time cycles) and reliability (Zero failures). The flexibility of the solution adds to its inclusion across a number of business ventures. This includes customer complaints, product and manufacturing defects, field failures, enhancement, and corrective and preventive measures. Agile PQM closes the support loop by unifying the company's customer service; field sales, manufacturing, and engineering organizations, and linking the company to its customers and partners.

As alternate quality management packages enter the market, customers demand quality products at a lower cost, and a reduced product lifecycle. Quality incidents reported by the customers help you detect defects and resolve them responsively. Tracking defects and finding the root cause of the defects in a timely manner are keys to effective defect reduction and improving product quality.

The Agile PQM solution consists of Product Service Requests (PSRs) and Quality Change Requests (QCRs). PSRs manage Problem Reports and Non-Conformance Reports. QCRs create and manage Audits, and Corrective and Preventive Actions (CAPAs).

## Product Service Requests

Product Service Requests report quality incidents, and aggregate a number of other PSRs to a single PSR. The PSR class includes Problem Reports (PRs) and Non-Conformance Reports (NCRs). PRs report generic quality incidents and NCRs report material deviations from specifications and other specific quality issues. For details, see [Working with Product Service Requests](#) on page 19.

### Problem Reports

A Problem Report contains a basic description of a quality issue, problem, or incident reported from a customer's perspective. A customer, field service representative, or supplier may submit a Problem Report provided they hold the appropriate privilege to process a Problem Report. You need to route a Problem Report for inquiry through a workflow. The inquiry team determines the root cause of the problem. The user with Quality Analyst role oversees the processing of the problem reports.

You use Agile Import or Agile SDK to import problem reports from different CRM systems.

### Non-Conformance Reports

A customer, field service representative, or supplier may submit a Non-Conformance Report (NCR) to report a basic material deviation from specifications or requirements in one or more products. You also need to route Non-Conformance Reports through a workflow for an inquiry.

Incoming inspection lots or testing processes use an NCR and the Quality Analyst checks samples for deviations from specifications.

## Quality Service Requests

Quality Change Requests creates and manages Audits and Corrective and Preventive Actions (CAPAs). An audit is the pro-active process of verifying compliance with quality requirements. The CAPA is a formal process of addressing any generic quality problems and analyzing the root cause so you can implement corrective and preventive actions.

QCRs allow you to aggregate problems into a routable quality record, perform root-cause failure analysis, and drive the problems to closure using standard CAPA (corrective and preventive actions) procedures. The CAPA may result in changes to a product, process, or supplier.

You can use QCRs to:

1. Create and manage quality records that aggregate problems related to products, documents, suppliers, and customers.
2. Provide a means for driving quality-related changes by creating changes such as ECOs, MCOs, ECRs, stop ships, and deviations.
3. Route change requests for review and approval, thereby enabling communication and collaboration between the originator (Quality Control), root-cause failure analysis (Quality Control and Engineering), resolution (Engineering), corrective/preventative action (Quality Management), communication (customers and suppliers) and verification (compliance/audit).

4. Provide an audit trail between problems, corrective and preventive actions, and engineering changes that enable internal and external compliance processes.

For example, while conducting a quality check on the incoming lot of items from your supplier, you identify a defective item. To take corrective action, you create a QCR for the defective item and route it for review and approval. You can route the item through a change to ensure rectification of the defect and check for the latest revision of the item.

For more details, see [Working with Quality Service Requests](#) on page 53.

## Audits

An Audit is a pro-active process of verifying compliance with quality requirements. Default Audit workflows are different from CAPA workflows. For details, see [Workflow tab of a QCR](#) on page 61.

## Corrective and Preventive Actions

Corrective and preventive actions (CAPAs) address generic quality problems for one or more PSRs. A CAPA could result in the creation of one or more changes that lead to fixing the problems. A CAPA is a routable object and a workflow controls it. CAPA workflows vary for different workflow statuses. For details, see [Workflow tab of a QCR](#).

## Tracking Quality

Tracking quality helps organizations identify, measure and improve business processes, which in turn leads to improved business performance and thus assures customer satisfaction. Monitoring non-conformance reports and implementing CAPAs help organizations meet standards. We look at some of the quality features that enable us to meet these standards.

## Tracking Quality Roles

Product Quality Management provides these roles:

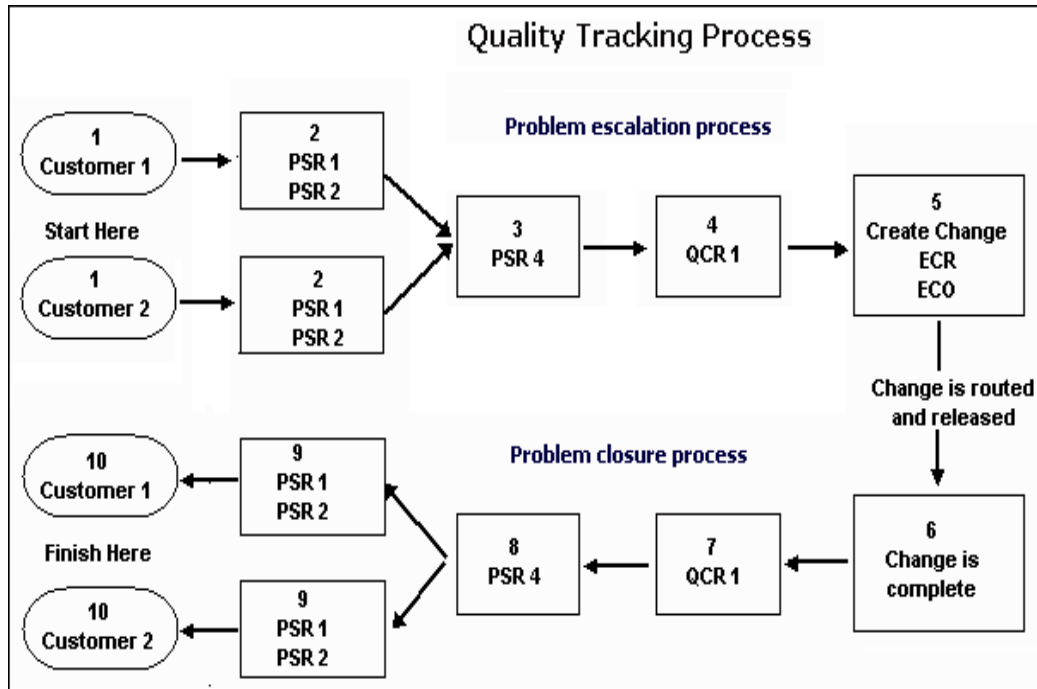
**Quality Analyst** – The role of a Quality Analyst allows you to submit Problem Reports (PRs) and Non-Conformance Reports (NCRs) and manage their resolution.

**Quality Administrator** – The role of a Quality Administrator allows you to manage Audits and CAPAs.

For details about Agile PLM roles, see the *Agile PLM Administrator* guide.

## Tracking Quality Process

The following diagram illustrates an example of a quality incident process. Following the diagram is a description of each numbered step.



1. Two customers report quality incidents. Customer 1 and Customer 2
2. The support division creates problem service requests (PSRs) for the reported incidents.
3. PSR-1, PSR-2, PSR-3 for Customer 1.  
PSR-1, PSR-2, PSR-3 for Customer 2.
4. Submits PSRs to the Quality Analyst, who reviews all the PSRs.
5. Since all PSRs pertain to similar incidents even though they are from different customers, the Quality Analyst aggregates them to a single PSR and creates PSR-4.
6. For further processing, routes PSR-4 through a workflow.
7. The Quality Administrator creates a quality change request, QCR-1. The QCR includes a list of the items that it affects.
8. Routes the QCR.
9. The engineering team determines if the request is valid and merits a change (an ECO, MCO, and ECR, stop ship or deviation depending on the problem).
10. Create a change to address the problem. The Change Analyst routes the change through the workflow.
11. Changes implemented fix the problem. The Change Analyst sends a notification to the Quality Administrator, who checks if the change did address the problem documented in the QCR.
12. The quality administrator takes action to close the QCR.

## Quality Related SmartRules

SmartRules are system wide settings that let you choose how to manage specific behaviors in Agile PLM. Agile Administrator can modify these settings. The following SmartRules relate to Product Quality Management processes:

- Many Items per PSR
- Many QCRs per PSR
- PSR contains Items and Related PSRs
- Release QCR with resolved Items.

We take the example of PSR contains Items and Related PSRs SmartRule.

The PSR contains Items and Related PSRs SmartRule controls the behavior of the Affected Items tab and the Related PSR tab of PSRs. If you set the SmartRule to Allow, PSRs can have both affected items and related PSRs. Otherwise, both Affected Items and related PSRs are mutually exclusive. In other words, if the Affected Items tab lists items, then the Related PSR tab is unavailable; and if Related PSR tab lists PSRs, then the Affected Items tab is unavailable. This allows you to choose whether to use a PSR as an aggregation of other PSRs or as a problem report against assembly items.

For complete details on these and other SmartRules, see the *Agile PLM Administrator* guide.

## Quality Searches

You can perform a search by selecting the required search from either the Quick Search or Advanced Search from the Quality Searches folder to find specific PSRs and QCRs. For example, if you are a Quality Administrator and need to assign all unassigned PSRs to Quality Analysts, you can do a quick search of all unassigned PSRs. Listed below are some of the sample quality searches:

- Unassigned PSRs
- Open PSRs
- PSRs submitted more than X hours ago
- QCRs submitted more than X hours ago
- Released QCRs
- Closed QCRs
- Unassigned Submitted QCRs
- Open QCRs

---

**Note** The Quality Searches folder appears only if the Administrator has specified the searches in your profile.

---

## Quality Reports

Agile PLM provides several standard reports that help you analyze data in Agile PQM.

In the navigation pane of the Agile Web Client, click Reports > Reports and Analytics > Standard Reports > Quality Reports. The Quality Reports lists the following reports:

- [Failure Trend Report](#) on page 7
- [Quality Activity Report](#) on page 9
- [Quality Backlog Report](#) on page 11
- [Quality Cycle Time Report](#) on page 13
- [Quality Metrics Report](#) on page 15

Each of the above Reports takes you through a Report Wizard provided you hold the necessary privileges. Step through the wizard. At the end of the process a Report appears. You can print the report, export its content, or save it. Executed report outputs are visible only in Web Client.

A Quality Report consists of the following tabs:

**General info** - gives you the general details about the report. The Agile administrator sets the fields on the General info tab.

**Layout tab**: In the Layout tab, you can add or edit fields in a standard or customized report layout, if required. You need appropriate privileges to edit the layout.

**Schedule**: The Schedule tab allows you to run a report using a specific schedule, or on specific date and time.

**Historical Report**: The Historical Report tab displays all previously run reports. It displays saved reports with the date, time and the name of the user who runs the report.

**History**: The History tab shows a summary of actions taken on the report.

For more details on the tabs of Quality Reports, see the *Getting Started with Agile PLM* guide.

### Failure Trend Report



The Failure Trend Report lists trends in failure mode over time. Based on the results, you can focus corrective efforts on those items that have the greatest effect on product quality.

To produce a report of the quantities affected during the specified period, Product Service Requests must have a value specified in the Affected Items Quantity Affected field. Ensure to obtain the necessary privileges to execute a report.

#### To run a Failure Report Trend:

1. In the navigation pane, navigate to Reports > Reports and Analytics > Standard Reports > Quality Reports > Failure Trend Report.
2. Click the Execute button.


A Run Failure Trend Report wizard opens.

3. The Select Layout and Configuration page appears. Select a Layout from the list.
  - a. Click the Edit  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
  - b. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - c. Click Save to save the changes or Close to close the palette.
4. In the Properties frame,
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Click Save to save the changes or Close to close the palette.
5. Click the Create  button to create a new layout. The Layout Presentation palette opens.
6. In the Format frame,
  - a. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - b. Click Save to save the changes or Close to close the palette.
7. In the Properties frame,
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Click Save to save the changes or Close to close the palette.
8. Select a format for the generated report from the Output Format list. You can choose from a list of formats - PDF, WORD, EXCEL, HTML, STANDARD.
9. Select the Save a copy of the report in the historical reports check box to save the generated report.

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**Note** The Save a copy of the report in the historical reports check box does not appear if you select the Standard output format.

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10. Click Next.
11. The Select or Create a Query page appears. The Failure Trend Report lets you search for Product Service Requests to use in the report.
  - a. Select the All Product Service Requests check box to choose from all the PSRs.
  - b. Select the Saved Search check box to choose from existing PSRs.
  - c. Click the Search  palette and choose a value from the Saved Searches list.
  - d. Select the Advanced Search check box.
  - e. Click Define Query. A Report Search palette opens. Choose from the list or enter the necessary details to define the query.

- f. Click Clear to clear the selection, Finish to continue and Close to close the palette.

**Note** For details about the Search palette, see the *Getting Started with Agile PLM* guide.

12. Click Next to proceed to the next step or Back to edit the Query.

The Define Report page appears.

13. In the Time Period frame:

- a. Click the calendar and select From date.
- b. Click the calendar and select To date.
- c. Select a Time Unit from the list.

14. In the Additional Report Criteria frame:

- a. Select a value from the Trend By list.
- b. Select the check box to display the Product Service Requests.
- c. Select the check box to Exclude Empty Columns.

15. Click Finish to display the report.

16. A Get Attachment dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the Close button, without saving it.

Save: Saves the report to the Historical Report tab.


Print: Prints the generated report.


Export: Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

## Quality Activity Report

The Quality Activity report lists quality incidents (product service requests and quality change requests) processed during a specified period.


### To run a Quality Activity Report:

1. In the navigation pane, navigate to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Activity Report.
2. Click Execute.  
A Run Quality Activity Report wizard opens.
3. The Select Layout and Configuration page appears. Select a Layout from the list.
4. Click the Edit  button to modify an existing layout. The Default Layout For PSR palette opens. Modify the required fields.
5. In the Format frame:
  - a. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - b. Click Save to save the changes or Close to close the palette.

6. In the Properties frame:
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Select the Layout Type.
  - f. Select the View in format of the report.
  - g. Click Save to save the changes or Close to close the palette.
7. Click the Create  button to create a new layout. The Layout Presentation palette opens.
8. In the Format frame:
  - a. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - b. Click Save to save the changes or Close to close the palette.
9. In the Properties frame:
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Select a Layout Type.
  - f. Select the View in format for the report.
  - g. Click Save to save the changes or Close to close the palette.
10. Select a format for the generated report from the Output Format list. You can choose from a list of formats - PDF, WORD, EXCEL, HTML, STANDARD.
11. Select the Save a copy of the report in the historical reports check box to save the generated report.

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**Note** The Save a copy of the report in the historical reports check box does not appear if you choose the Standard output format.

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12. Click Next.
13. The Select Date Range page appears.
  - a. Click the calendar and select a From date.
  - b. Click the calendar and select a To date to show the time covered.
14. Click Next.
15. The Select Additional Parameters page appears. In the Workflow and Status Change Criteria frame,
  - a. Select a workflow from the Workflow Type list.
  - b. Click the Search  palette to effect a change in the Status Changes to field. A change palette opens. Select an item and double-click to move it to the Status Changes to field.
  - c. Click Finish to display the report.
16. A Get Attachment dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the Close button without saving it.

**Save:** Saves the report to the Historical Report tab.



**Print:** Prints the generated report.

**Export:** Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

## Quality Backlog Report

The Quality Backlog Report lists incidents that are at a specified status but have not moved to the next status during a specified period.

### To run a Quality Backlog Report:


1. In the navigation pane, go to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Backlog Report.
2. Click the Execute button.  
A Quality Backlog Report wizard opens.
3. The Select Layout Configuration page appears. Select a Layout from the list.
  - a. Click the Edit  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
  - b. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - c. Click Save to save the changes or Close to close the palette.
4. In the Properties frame:
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Select a Layout Type.
  - f. Select a View in format for the report.
  - g. Click Save to save the changes or Close to close the palette.
5. Click the Create  button to create a new layout. The Layout Presentation palette opens. In the Format frame,
  - a. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - b. Click Save to save the changes or Close to close the palette.
6. In the Properties frame:
  - a. Enter a name in the Name field.
  - b. Select the type of Access.

- c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Select a Layout Type.
  - f. Select a View in format for the report.
  - g. Click Save to save the changes or Close to close the palette.
7. Select a format for the generated report from the Output Format list. You can choose from a list of formats - PDF, WORD, EXCEL, HTML, STANDARD.
  8. Select the Save a copy of the report in the historical reports check box to save the generated report.

---

**Note** The Save a copy of the report in the historical report check box does not appear if you select the Standard output format.

---

9. Click Next.
10. The Select or Create a Query frame appears. The Quality Backlog Report lets you search for Product Service Requests to use in the report.
  - a. Select the All Product Service Requests check box to choose from all the PSRs.
  - b. Select the Saved Search check box.
  - c. Click the Search  palette and choose a value from the saved Searches list.
  - d. Select the Advanced Search check box.
  - e. Click Define Query. A Report Search palette opens.
  - f. Choose from the list or enter the necessary details to define the query.
  - g. Click Clear to clear the selection, Finish to continue and Close to close the palette.
11. Click Next to proceed to the next step or Back to modify the Query.

The Define Report frame appears.
12. In the Time Period frame:
  - a. Use the calendar to select From date.
  - b. Use the calendar to select To date.
  - c. Choose a Time Unit from the list.
13. In the Status Change frame:
  - a. Select a workflow from the Workflow list.
  - b. Select a Starting Status.
  - c. Select a To status.
14. In the Additional Report Criteria frame:
  - a. Select a value from the Trend By list.
  - b. Select the check box to display the Product Service Requests.
  - c. Select the check box to Exclude Empty Columns.
15. Click Finish to display the report.
16. A Get Attachment dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the Close button without saving it.

**Save:** Saves the report to the Historical Report tab.

**Print:** Prints the generated report.



**Export:** Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

## Quality Cycle Time Report

The Quality Cycle Time Report calculates the time it takes for the specified product service requests and quality change requests (PSRs and QCRs) to move to another status in a specified period.

The report lists the requests and shows the average time each PSR or QCR takes between two statuses. For example, the report indicates the average time it took for a PSR or QCR to go from Submitted to Released each month during the last year, grouped by a product line.

### To run a Quality Cycle Time Report:


1. In the navigation pane, go to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Cycle Time Report.
2. Click Execute.  
A Quality Cycle Time Report wizard displays.
3. The Select Layout and Configuration frame appears. Select a Layout from the list.
4. Click the Edit  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
  - a. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - b. Click Save to save the changes or Close to close the palette.
5. In the Properties frame:
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Select a Layout Type.
  - f. Select a View in format for the report.
  - g. Click Save to save the changes or Close to close the palette.
6. Alternately, click the Create  button to create a new layout. The Layout Presentation palette opens. In the Format frame:
  - a. Select properties from the Hidden Properties column and move them to the Displayed Properties column using the right arrow. You can also position them in the required ascending or descending order using the arrow.
  - b. Click Save.
7. In the Properties frame:
  - a. Enter a name in the Name field.

- b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Select a Layout Type.
  - f. Select a View in format for the report.
  - g. Click Save to save the changes and Close to close the palette.
8. Select a format for the generated report from the Output Format list. You can choose from a list of formats - PDF, WORD, EXCEL, HTML, STANDARD.
  9. Select the Save a copy of the report in the historical reports check box to save the generated report.

---

**Note** The Save a copy of the report in the historical reports check box does not appear if you select the Standard Output Format.

---

10. Click Next.
11. The Select or Create a Query page appears. The Quality Cycle Time Report lets you search for Product Service Requests to use in the report.
  - a. Select the All Product Service Requests check box to choose from all the PSRs.
  - b. Select the Saved Search check box.
  - c. Click the Search  palette and choose a value from the Saved Searches list.
  - d. Select the Advanced Search check box.
  - e. Click Define Query. A Report Search palette opens.
  - f. Choose from the list or enter the necessary details to define the query.
  - g. Click Clear to clear the selection, Finish to continue and Close to close the palette.
12. Click Next to proceed to the next step or Back to modify the Query.

The Select or create a Query page appears.
13. In the Time Period frame:
  - a. Use the calendar to select From date.
  - b. Use the calendar to select To date.
  - c. Choose a Time Unit from the list.
14. In the Status Change frame:
  - a. Select a workflow from the Workflow list.
  - b. Select a Starting Status.
  - c. Select a To Status
15. In the Additional Report Criteria frame:
  - a. Select a value from the Trend By list.
  - b. Select the check box to display the Product Service Requests.
  - c. Select the check box to Exclude Empty Columns.
16. Click Finish to display the report.
17. A Get Attachment dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print or export the report. The report is lost if you click the Close button without saving it.

**Save:** Saves the report to the Historical Report tab.



**Print:** Prints the generated report.

**Export:** Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

## Quality Metrics Report

The Quality Metrics Report shows quality incidents (product service requests and quality change requests) that moved to a specified status during a specified period.

### To run a Quality Metrics Report:

1. In the navigation pane, go to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Metrics Report.
2. Click Execute.  
The Quality Metrics Report wizard displays.
3. The Select Layout and Configuration page appears. Select a Layout from the list.
4. Click the Edit  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
  - a. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows.
  - b. Click Save to save the changes or Close to close the palette.
5. In the Properties frame:
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.
  - e. Select a Layout Type.
  - f. Select a View in format for the report.
  - g. Click Save to save the changes or Close to close the palette.
6. Alternately, click the Create  button to create a new layout. The Layout Presentation palette opens. In the Format frame:
  - a. Select properties from the Hidden Properties column and move them to the Displayed Properties column using the right arrow. You can also position them in the required ascending or descending order using the arrow.
  - b. Click Save to save the changes and Close to close the palette.
7. In the Properties frame:
  - a. Enter a name in the Name field.
  - b. Select the type of Access.
  - c. Select the Paper Size from the list.
  - d. Select the Orientation of the paper.


- e. Select a Layout Type.
  - f. Select a View in format for the report.
  - g. Click Save to save the changes and Close to close the palette.
8. Select a format for the generated report from the Output Format list. You can choose from a list of formats - PDF, WORD, EXCEL, HTML, STANDARD.
  9. Select the Save a copy of the report in the historical reports check box to save the generated report.

**Note** The Save a copy of the report in the historical reports check box does not appear if you select the Standard output format

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10. Click Next.

The Select or Create a Query page appears. The Quality Metrics Report lets you search for Product Service Requests to use in the report.

11. Select the All Product Service Requests check box to choose from all the PSRs.
12. Select the Saved Search check box.
13. Click the Search  palette and choose a value from the list of Saved Searches.
14. Select the Advanced Search check box.
  - a. Click Define Query. A Report Search palette opens.
  - b. Choose from the list or enter the necessary details to define the query.
  - c. Click Clear to clear the selection, Finish to continue and Close to close the palette.
15. Click Next to proceed to the next step or Back to edit the Query.

The Define Reports page appears.
16. In the Time Period frame:
  - a. Use the calendar to select From date.
  - b. Use the calendar to select To date.
  - c. Choose a Time Unit from the list.
17. In the Status Change frame:
  - a. Select a workflow from the Workflow list.
  - b. Select a status from the Status Type.
18. In the Additional Report Criteria frame:
  - a. Select a value from the Trend By list.
  - b. Select the check box to display the Product Service Requests.
  - c. Select the check box to Exclude Empty Columns.
19. Click Finish to display the report.
20. A Get Attachment dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the Close button without saving it.

Save: Saves the report to the Historical Report tab.

Print: Prints the generated report.

Export: Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

## Quality Tracking Tabs

You can link Quality information on certain tabs and fields with information about objects such as items, customers, and suppliers. The organization can then assess the quality risk of incorporating certain parts into their designs.

- The Quality tab for items displays all PSRs reported against that item.
- The PSRs tab of a Customer object lists all quality incidents reported by the customer. This can help you gauge customer satisfaction.
- The PSRs tab of a Supplier object lists all quality incidents filed against the supplier. This can affect purchasing by helping you gauge the quality performance of a supplier so that you can establish a rating or preference for that supplier.

## Viewing Quality Issues against Customers and Suppliers

Listed below are a number of ways you can view Quality issues against Customers or Suppliers.

- Execute a Quick Search - Fastest way to find PSRs, QCRs, Customers, and Suppliers on the Home Page.
- Custom Search - A combination of different queries returns PSRs with matching criteria. For example, Product Service Requests: Customer is not Null OR Supplier is not Null.
- Advanced Search - Most effective way of finding objects setting multiple criteria and filtering down on objects. For example,  
Items with PSRs of Customer/Suppliers, which have QCRs initiated.  
Items only have PSRS for Customers/Suppliers but QCR is not initiated.  
Items having PSRs & QCRs and Changes associated with them.
- View Parts - The Quality tab of Parts displays the PSR & QCR numbers along with Customer and Supplier details
- Search Personalization - Format a search and choose the required View by using the Personalize menu. For example, View all the QCRs/PSRs for Customers and Suppliers in displayed fields.



# Working with Product Service Requests

You can create Product Service Requests (PSR), depending on the quality of the incidents. They can report either a single quality incident or multiple incidents with a single PSR.

This chapter includes the following topics:

- [Creating Product Service Requests](#) on page 19
- [Cover Page tab of a PSR](#) on page 24
- [Affected Items tab of a PSR](#) on page 28
- [Related PSR tab](#) on page 33
- [Relationships tab](#) on page 38
- [Workflow tab of a PSR](#) on page 49
- [Attachments tab of a PSR](#) on page 50
- [Submitting and Routing PSRs](#) on page 50

## Creating PSRs

You must have the necessary privileges to create PSRs. For more details on Roles and Privileges, see the *Getting Started with Agile PLM* guide.

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**Note** The role of a Quality Analyst allows you to create, edit, delete, and perform all necessary actions on PSRs.

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## Creating a Product Service Request

You can use the Create New feature to create a PSR.


### To create a PSR in Java Client:

1. Launch the Agile Java Client.
2. On the main toolbar, click File > New > Product Service Requests > Problem Reports.
3. In the New dialog that appears,
  - a. Choose the required sub-class (NCR or Problem Report) from the Type list.
  - b. In the Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
  - c. Choose a Quality Analyst from the list.
4. Click OK.

Agile Java Client creates a PSR and displays it with the Cover Page in the edit mode.

For more information about the cover page, see Cover Page tab of a PSR

**To create a PSR in Agile Web Client:**

1. Launch the Agile Web Client.
2. On the main toolbar, click the Create New menu.
3. Select Product Service Requests> Problem Report or Non-Conformance Report from the drop-down menu. The Create New dialog appears.
4. Select a required subclass (NCR or Problem Report) from the Type list.
5. In the PSR Number field, accept the default number, enter a number, or click the Autonumber  button to generate number.
6. Click Save.

The Agile Web Client creates the PSR and displays it with the Cover Page in the edit mode.

If you do not assign a workflow to the PSR, it displays the Unassigned status.

**To assign a workflow to the PSR:**


1. Open a PSR and click the Edit button.
2. Select a workflow from the Workflow list. For details, see Workflow tab of a PSR.
3. Click Save.

The status of the saved PSR appears on the right corner of the page. For example, the status assigned can be - Pending, Submitted, Review, or Released.

## Creating a PSR from an Item

You can create PSRs from an Item provided you hold the necessary privileges.

**To create a PSR from an Item in Java Client:**


1. Open an Item from which you want to create a PSR.
2. Select Create New Product Service Requests from the Actions menu.
3. In the New dialog:
  - a. Choose the desired subclass (NCR or Problem Report) from the Type list.
  - b. In the PSR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
  - c. Choose a Quality Analyst from the list.
  - d. Click OK.

Agile Java Client creates the PSR and displays it with the Cover Page tab on top in the edit mode.

4. Enter values in relevant fields on the Cover Page tab.
5. Click Save to save the changes.

The Item appears on the Affected Items tab of the new PSR.

**To create a PSR from an Item in Web Client:**

1. Open the Item from which you want to create a PSR.
2. On the Item page, choose Actions > Create New > Product Service Request. The Create New page appears.
3. Choose the desired subclass, (NCR or Problem Report) from the Type list.
4. In the PSR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
5. The PSR opens in the edit mode. Click Save to save the changes.
6. The PSR displays the Cover Page. The Item appears on the Affected Items table of the PSR.

Agile Web Client creates a PSR and displays it with the Cover Page tab on top. The Item appears on the Affected Items tab of the new PSR.

**Creating a PSR to Aggregate multiple PSRs**

Consider the fact that you are a Quality Analyst in a firm. You notice several incoming shipments from suppliers that do not conform to the material specifications. You track down these incidents and create a single PSR to aggregate all the supplier's incidents.

The single PSR you create is the Parent PSR. All the added PSRs on the Related PSR tab are child PSRs.

---

**Note** Depending on enabling/disabling the "PSR contains Items and Related PSRs" SmartRule setting, you can enable/disable the Affected Items tab after you add Related PSRs.


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**To create a PSR to aggregate multiple PSRs in Java Client:**

1. Open a PSR you want to use as the basis for a new PSR or choose File > Save As or right click and choose Save As to. See, [Creating PSR using Save As](#) on page 22.
2. The PSR opens with the Cover Page in the edit mode. On the Affected Items tab, do not add any items. On the Related PSR tab, add related PSRs.
3. Click Add to add related PSRs.

After you add related PSRs to this Parent PSR, the Aggregate PSR Number column for each child PSR on the Related PSR tab displays the number of the parent PSR.

**To create a PSR to aggregate multiple PSRs in Web Client:**

1. Open a PSR you want to use as the basis for a new PSR or choose Actions > Save As. The Save As page appears.
2. The PSR opens with the Cover Page in the edit mode. On the Affected Items tab, do not add any items. On the Related PSR tab, add related PSRs.
3. Click Add to add related PSRs.
  - a. Click the Search to add  button to launch a palette. (Alternately, press the Ctrl +L key combination).

- b. Click the Create to add  button to create new PSRs to add to the PSR.


After you add related PSRs to this Parent PSR, the Aggregate PSR Number column for each PSR on the Related PSR tab displays the number of the parent PSR. On the Cover Page of the child PSRs, the Parent PSR number appears in Aggregate PSR Number field, automatically.

Field	Completes	Indicates
PSR Event	Manually	<p>Status of the Parent PSR that triggers an automated workflow event.</p> <p>Select an available status from the list. You can specify the status when the PSR has a workflow assigned. When this event occurs, it means that this PSR has reached the specified status.</p> <p><b>Note:</b> Only if you assign a workflow to both objects (parent and child) on the Cover Page, can you specify the PSR Event status.</p>
PSR Result	Manually	<p>The status to which you promote the related PSRs to, when it reaches the Event status.</p> <p>When the Parent PSR reaches the specified status in the PSR event field, the status of the Related PSR moves to the specified result in this field.</p> <p><b>Note:</b> Only if you assign a workflow to both objects (parent and child) on the Cover Page, can you specify the PSR Event status.</p>

## Creating a PSR using Save As

The Save As feature provides an easy method to create a PSR similar to the existing PSR. The Save As feature copies data from a field in the existing PSR to the same field of the new PSR. If a field or a list value in the existing PSR is not available in the new PSR, then the system does not copy the field or data to the new PSR.

### To create a PSR using Save As in Java Client:

1. Open a PSR you want to use as the basis for a new PSR.
2. Choose File >Save As or right -click and select Save As. The Save As dialog appears.
  - a. Select the required sub-class (NCR or Problem Report) from the Type list.
  - b. In the PSR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
  - c. Click OK.

Agile Java Client creates a PSR and displays it with the Cover Page in the edit mode.
3. Enter values in relevant fields on the Cover Page tab.
4. Click Save to save the changes.

**To create a PSR using Save As in Web Client:**

1. Open a PSR you want to use as the basis for a new PSR.
2. Choose Actions >Save As. The Save As dialog appears.
3. Select the required sub-class (NCR or Problem Report) from the Type list.
4. In the PSR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
5. If the original PSR contains Attachments, then a frame displays the following options:
  - Reference existing files — creates a new reference to the existing file folder on the new PSR's Attachments tab.
  - Create new copies of files — creates a new copy of the attachment, and places it in a newly created file folder.
  - Do not include files — creates a new PSR without any attachments.
6. Click Save. The new PSR opens displaying the Cover Page in the edit mode.
7. Enter values in relevant fields on the Cover Page tab.
8. Click Save to save the changes.

**Caution** In general, do *not* use the Save As feature to create an object in a different class or subclass of the original. The different classes or subclasses may not have the same tabs or defined fields, and access to data in the newly created object may be lost.

Fields copied from old object	Pre-populated fields
Category, PSR Type, Problem Description, Severity, Product Line(s)	Originator
Page two and Page Three flex fields	Date Originated
Copies all the item information from the Affected Item tab.	Status field is set to Unassigned by default.
Copies all attachments from the Attachments tab	
History tab reflects the source and target objects	

The new PSR copies fields in the optional Page Two and Page Three sections, only if the Agile PLM Administrator has set appropriate preferences. Since Page Three data applies to a specific subclass only, if you use Save As to create a new object of a different subclass, the Page Three data is *NOT* copied to the new object. For more information about the behavior of Page Two and Page Three fields in an Agile PLM system, see the *Agile PLM Administrator* guide.

The PSRs you create remain in the system until you delete them. Deleting PSRs does not remove them from the Agile database. To delete PSRs permanently, you need to hard-delete them. For details on deleting PSRs and QCRs, see [Deleting Agile Objects](#) on page 73.

## Search for PSRs or QCRs

Agile PLM helps you locate objects by Quick Search, Custom Search, and Advanced Search.

- The Execute a Quick Search button helps you locate objects in the fastest possible way.
- The Custom Search (Ctrl+ Shift +Q) button helps you locate objects by customizing the search criteria. Search Results display objects matching criteria.
- The Advanced Search button helps you locate specific objects by providing multiple search criteria.

### To run a quick search:

1. Select an object and enter a wildcard (\*).
2. Click the Execute a Quick Search button.

The Search results return a list of objects.

---

**Note** Select the Convert to Advanced Search option, if required.

---

For details, see 'Searches' in the *Getting Started with Agile PLM* guide.

## Cover Page tab of a PSR

The following table lists and describes the fields on the Cover Page tab of a PSR and provides information on working with the tabs for Product Service Requests.

Fields	Completed	Indicates
PSR Number	Automatically, when you create it. <b>Note:</b> In the Admin setting if 'Autogenerate' is set to 'Yes' then the number will be generated automatically, otherwise you have to enter PSR number.	The number assigned to the PSR when you create it.  For a Problem Report, the number is prefixed with PR.  For a Non-Conformance Report , it is prefixed with a NCR.
PSR Type	Automatically, when you create it.	The Type (subclass) selected when you create the PSR.
Category	Manually.	The list of categories defined by the Agile PLM Administrator. For example:  Customer Complaint  Audit - External  Preventive Action
Description	Usually manually, can contain a default.	Maximum number of bytes is set by the Agile PLM Administrator; up to 4000 bytes, including spaces and carriage returns (which count as two bytes).


<b>Customer</b>	Manually	The list of customers associated with this PSR.
<b>Supplier</b>	Manually	List of suppliers who initiated the incident or are the cause of the incident.
<b>Severity</b>	Manually	The list of severities defined by the Agile PLM Administrator.
<b>Disposition</b>	Manually	<p>The list of dispositions defined by the Agile PLM Administrator.</p> <p>The Disposition field displays a code that represents the way in which a PSR is being resolved.</p> <p>Examples of dispositions are Replace Component and Rework to Spec.</p>
<b>Expected Resolution Date</b>	Manually	Date when the PSR will be resolved.
<b>Quality Analyst</b>	May be provided automatically by the workflow; otherwise selected manually from a list. Departments appear first in the list, followed by individual user names.	<p>The default Quality Analyst.</p> <p>If you define the workflow to notify the default Quality Analyst, the department or user in this field receives notifications about the PSR. If this field is blank, then the notifications are sent to every quality analyst on the list.</p> <p>If the workflow is at the Pending status and has a Quality Analyst defined than that User receives notification.</p> <p>If the notification definition in the workflow is blank, then no notifications are sent.</p>
<b>Workflow</b>	<p>If more than one workflow applies to the PSR, the workflow is selected manually; the workflow selection can be changed as long as the PSR is in the Pending status. Selecting a workflow switches the PSR to the Unassigned status.</p> <p>You cannot move the PSR to the next status from the Unassigned state without assigning a workflow.</p>	The name of the workflow used to move this PSR through the quality tracking process.
<b>Status</b>	Automatically, when created	The current workflow state of the PSR. If you do not select a workflow, the status remains Unassigned.
<b>Originator</b>	Automatically, when created.	The default creator of the PSR. Also contains a list of other problem report originators.

<b>Date Originated</b>	Usually automatically, when created.	The date you create the PSR.
<b>Date Submitted</b>	Automatically generated based on workflow status.	The date when the PSR moves to the Submitted status in the workflow.
<b>Date Released</b>	Automatically generated based on workflow status.	The date when the PSR moves to the Released status in the workflow.
<b>Final Complete Date</b>	Automatically generated based on workflow status.	The date when the PSR moves to the Complete status in the workflow.
<b>Aggregate PSR Number</b>	Automatically filled in when you add PSR(s) to the Related PSR tab.	Automatically fills the parent PSR number.
<b>Product Line(s)</b>	Manually	The product lines this PSR affects.

## Updating the Cover Page of a PSR

After you create a PSR, you can modify it to provide additional information you did not include when you created it or edit any information that has changed since its creation, provided you hold the appropriate privileges. You can modify the fields on the Cover page several times. Some of the fields, like the PSR Type, on the Cover Page are automatically populated.

### To edit the Cover Page of a PSR in Java client:



1. Open a PSR. The PSR number and the PSR type fields are pre-populated.
2. Select a value from the list in the Category field.
3. Enter text in the Description field.
4. Click the link to search for Customers.
5. A Select Object dialog appears.
6. Enter \* and click the Search button.
7. From the Search results list, select an object and move it to the Selected Objects column using the arrow.
8. Click OK.  
Alternately, click the Advanced Search link.
  - a. In the Advanced Search dialog, select the Create New or Use a Saved Search option.
  - b. Choose from lists or enter text as required.
  - c. Click Run to run the search, Click Save to save the changes, click More for additional criteria and click Close to close the dialog.
  - d. Click OK to save the changes or Cancel to return to the Cover Page.
9. Choose Severity of the PSR from the list.
10. Choose a Disposition from the list.
11. Use the calendar  and select an Expected Resolution Date.

12. Click Save to save the changes.

The Cover Page displays modified values.



**To edit the Cover Page of a PSR in Web Client:**

1. Open a PSR and click the Edit button to modify it.
2. The PSR number and PSR Type number fields are automatically populated.
3. Select a value from the list in the Category field.
4. Enter text in the Description field.
5. To search for Customers and Suppliers, you can either:

- Click the  button below the Customer/Supplier field to launch a palette to search for existing Customers or Suppliers.
- Click the  button to create new Customers or Suppliers.

The Search palette filters, searches, or browses for data from the database.


To search for existing customers or Suppliers:

- a. Click the  button below the Customer/Supplier field to launch a palette to search for existing Customers or Suppliers. (Alternately, press the Ctrl +L key combination).
- b. Enter a known value or \* to search for and click the Execute a Quick Search  button.
- c. Select a Customer or Supplier from the list that appears. To move the Customer or Supplier to the Cover Page field, either
  - Drag and drop it.
  - Double-click on it.
  - Press Enter.



---



**Note** You can Search and add objects from a palette in three ways:  
 Drag the selected object and drop it on the table of the required object.  
 Double-click the selected object.  
 Select the object and hit the Enter key.  
 For details, see the *Getting Started with Agile PLM* guide.

---

- d. Click the Close  button to close the palette.

To create new customers:

- e. Click the  button to create new Customers or Suppliers.
  - f. In the Type field, select a Customer from the list.
  - g. In the Number field, enter a number or click the Autonumber  button.
  - h. Enter Customer Name.
  - i. Click Save.
6. Choose Severity of the PSR from the list.
  7. Choose a Disposition from the list.

8. Use the calendar  to select a resolution date. Alternately, click Ctrl+L to launch the palette.
9. Choose a Workflow from the list. Updates of the workflow status are automatic as the PSR moves to the next status.
10. The Originator and Quality Analyst fields are pre-defined.
11. Click the  palette and choose one or more Product Lines that this PSR affects. (Alternately, press the Ctrl+L key combination).
12. Click Save to save changes.

The Cover Page displays modified values.

## Affected Items tab of a PSR

The Affected Items tab of a PSR lists items affected by the current PSR. A single PSR can affect multiple items (like Parts, Documents). When you add PSRs to the Relationships tab, a PSR Items table also appears.

---

**Note** You can add Affected Items only if the PSR is *not* in the Released status of the workflow.

---



You can add additional items (like parts, documents, assemblies) that need resolution to the Affected Items tab. The same applies to QCRs also. You can modify the newly created PSR with any information that has changed since its creation.

A few fields on the Affected Items tab of an NCR are different from that of a PR. The table below lists additional fields in an NCR. These fields provide additional information about deviations of a product.

The Affected Items table lists and describes the following fields by default.

Field	Completed	Indicates
Item Number	Automatically, when created.	Number of the Affected Item.
Item Description	Automatically, when created.	Description of the item.
Rev Found	Manually	<p>The revision of the affected Item in which you find the problem of the Affected Item. For example, if the item has undergone five revisions, and you identify the defect in revision B, then <b>Rev found</b> displays B.</p> <p>In Web Client, when you select an item to add, all the revisions of the item appear in the drop-down list with the latest released revision shown by default.</p> <p><b>Note:</b> You can add multiple copies of an item at the same revision to the Affected Items tab.</p>

<b>Affected Site</b>	Automatically, when created.	The site at which the affected items are having problems.
<b>Failure Mode</b>	Manually	Displays the reason a product failed or did not meet customer requirements. Select the failure mode from a list defined by the Agile Administrator. You can define a list of failure modes for each subclass of an item.  For example, a failure mode for a battery might be No Charge, and the failure mode of a power strip might be Blown Fuse.
<b>Quantity affected</b>	Manually	The number of Items affected by the quality incident.
<b>Rev Fixed</b>	Automatically. When you fix the problem in the revision. You can also change it manually.	The revision of the Item in which the problem is fixed. You can update this field manually or it is populated automatically when you release the ECO.

**Note** The Item Number field indicates the  Ascending or  Descending order of the table, depending on the sort order you choose in the Personalize menu.

**Note** The Personalize menu enables you to create and customize Views. Use the Personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views.

## Attributes of the Affected Items tab of an NCR

The attributes and operations of NCRs are similar to those of the Problem Reports except for a few additional fields on the Affected Items tab. These fields provide additional information about deviations in one or more products.

The table below details the fields of a process in which the quality assurance team examines incoming materials from a supplier.





Field	Completed	Indicates
<b>Conformance Specification</b>	Manually	Information about what the materials should be, according to engineering specifications.
<b>Serial/Lot Number</b>	Manually	Serial number or Lot number of the items of the batch that was defective (this is similar to the unique identifier for the batch of goods).
<b>Total Quantity Suspect</b>	Manually	Total Quantity suspected of problems.  For example, you receive a lot of 500 units, inspect 20 units and find that 5 are defective:  500 total suspect  20 checked

		5 affected
Quantity Checked	Manually	The number of inspected items.
Quantity Affected	Manually	The actual number of items affected with problems.
Containment Actions	Manually	Containment actions taken to dispose the material.
RMA Number	Manually	Return Merchandise Authorization. This is the number from the supplier that authorizes you to send the defective materials back to the source; it is usually a slip of paper.
Conforming Material Date	Manually	The date when the supplier expects to be able to send materials that does conform to the specifications.

## Adding Items to the Affected Items tab of a PSR

You can add Items to a PSR using the Add button on the Affected Items table. You can either search for existing Items or create new Items. Items can include Parts, BOMs.

### To add Items to the Affected items tab in Java Client:

1. Open the PSR and click the Affected Items tab.
2. Click the Add  drop-down and choose the Create  button to create new items, the Search  button to search for one or more existing items, and Type-in-known numbers  to search for known items.

### To create Items:

1. Select a type from the Type list.
2. If appropriate, enter an Item number and a description.
3. Click OK.

The Item appears on the Affected Items table.

### To search for existing Items:

1. Select a search method from the Add Affected Items dialog box.
2. To perform a simple search, enter the value to search for and click Search. You can also define an Advanced Search, run a Saved Search, select a Bookmarked item, or select from the Recently Visited folder.
3. Select the items from the search results. Use the right arrow or double-click the selected item to move it to the Select Related Items column.
4. Ensure to select the Edit rows after adding checkbox, to select different revisions of items or edit other fields.
5. Click OK.

The item in the Selected Affected Items list appears on the Affected Items table.

#### To Type in Known Numbers:



1. Enter one or more numbers on separate rows, and click Add.
2. The Item appears on the Affected Items table.

---




**Note** If you click the Add button once without selecting an option from the list, the Type-in Known Numbers dialog appears.

---



#### To add Items to the Affected Items tab of a PSR in Web Client:

1. Open the PSR and click the Affected Items tab.
2. Click Add in the Affected Items tab.
  - Click the Search to add  button to launch the palette to search for existing items.
  - Click the Create to add  button to create new Items.
  - Select an Item from the Recently Visited folder, drag and drop it in the Affected Items table.
  - Copy an Item existing on one PSR and paste it in the Affected Item's table of another PSR.

#### To search for existing items:

1. Click the Search to add  button to launch the palette. (Alternately, press the Ctrl +L key combination).
2. Enter the value or \* to search for and click the Execute a Quick Search  button.
3. Select an Item from the list that appears. To move it to the Affected Items table, you can either:
  - Drag and drop it.
  - Double-click on it.
  - Press Enter.
4. Click the Close  button to close the dialog box.  
The Item appears on the Affected Items table.

#### To create items:

1. Click the Create to add  button.
2. In the Type field, select an Item from the list.
3. In the Number field, enter a number or click the Autonumber  button.
4. Enter details in the Description field.
5. Click Add to add the item to the table or click Cancel to return to the Affected Items table.  
The Item appears on the Affected Items table.

**To copy and paste objects:**

1. Select an Item from the Affected Item's table of a PSR. (The object can be from either the Related PSR tab, Relationships tab, or the Attachments tab of a PSR or from another object).
2. Click the More button and select Copy.
3. Navigate to the Affected Items tab of another PSR.
4. Click the More button and select Paste.

The Item appears on the Affected Items table.


---

**Note** An Agile PLM SmartRule named Many Items per PSRs determines whether you can add multiple items to the Affected Items tab of a PSR. If Many Items per PSR is set to Allow, you can add more than one Item to the PSR. Otherwise, you can add only one Item (one row) to the PSR.

---

## Removing an Item from the Affected Items tab

**To remove an Item from the Affected Items tab in Java Client:**

1. Open a PSR and click the Affected Items tab.
2. Select the row of the Item you want to remove.
3. Click the Remove  button.
4. Click OK to confirm a message, which prompts you to confirm removal of the Item.

**To remove an Item from the Affected Items tab in the Web Client:**


1. Open a PSR and click the Affected Items tab.
2. Select the row of the Item you want to remove.
3. Click Remove.

A message bar displays the number of rows removed from the table.

## Editing Items on the Affected Items tab

You can edit items on the Affected Items tab several times if necessary, as long as they are *not* in the Released state.

**To edit the Items on the Affected Items tab in the Java Client:**

1. Open a PSR and click the Affected Items tab.
2. Select the item row you want to edit.
3. Click the Edit Affected Items  button. The Edit Affected Items dialog appears.
4. Double-click on the cell of the row you want to edit, to edit the required fields.
5. Modify text or use the lists to select values.

Alternately, double-click on the cell, modify the cell and press Enter

- When you finish editing, click OK.

For more details on the fields see, the [Affected Items tab of a PSR](#) on page 28.

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**Note** If you manually update the Rev Fixed field, then you automatically populate the Latest Change field with the ECO related to that revision change. The Rev Fixed drop-down list contains all revisions for the item.

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For example, you can manually update the Rev Fixed field in the following cases:

- You submit a quality incident, and you already release or implement a known fix; then you simply update the Rev Fixed field to account for the fact that this problem was already addressed and corrected in that particular revision.
- Update a PSR that does not have a parent and that is not associated with a change or QCR.

**To edit the Items on the Affected Items tab in the Web Client:**

- Open a PSR, and click the Affected Items tab.
- Select the row you want to edit.
- To edit the required fields, double-click on the cell of the row you want to edit. Alternatively, you can navigate to the cell and press Enter.
- Enter text or use the lists to select values.
- Click Save to save the changes.

---

**Note** If you manually update the Rev Fixed field, then you automatically populate the Latest Change field with the ECO related to that revision change. The Rev Fixed drop-down list contains all revisions for the item.

---

## Related PSR tab

The Related PSR tab contains a list of PSRs that aggregate into a single Parent PSR. Edit information and aggregate related PSRs into the Parent PSR.



For example, if multiple customers reported similar problems, each problem reported creates a Problem Report. The Quality team realizes they are related and hence can be resolved with a single solution. To resolve the problem, the Quality team creates a single PSR (Parent PSR) and adds (Aggregates) the related PSRs to the Parent PSR.

The Related PSR tab lists and describes the following columns by default:

Field	Completes	Indicates
PSR Criteria Met (Image)	Automatically, when you meet the PSR Event criteria.	Indicates when the PSR event occurred (that is, the parent PSR has reached the status selected for the PSR event).  Once the parent PSR attains the status specified in the PSR Event field, then the related PSR status automatically moves to the status specified in the PSR Result field and completes the criteria specified.

<b>Event</b>	Manually	<p>The status of the parent PSR that triggers an automated workflow event.</p> <p>Select an available status from the list. You can specify the status only when the PSR has a workflow assigned. When this event occurs, it means that the PSR has reached the specified status.</p> <p>The default value of the PSR Event is set to the Closed status. If you have Quality Analyst privileges, you can set the default value to another status in Java Client. For details, see the Relationships tab.</p> <p><b>Note:</b> You can specify the PSR Event status only when both objects (parent and child) are assigned a workflow on the <b>Cover Page</b> tab.</p>
<b>Result</b>	Manually	<p>The status to which the related PSRs are promoted when the event status is reached. Select an available status from the list. You can specify the status only when the PSR has a workflow assigned.</p> <p>When the parent PSR reaches the status in the PSR Event field, then the status of the related PSR is automatically moved to the specified result status in this field.</p> <p>The default value of the PSR Result is set to the Closed status. If you have Quality Analyst privileges, you can set the default value to another status in Java Client. For details, see Relationships tab.</p> <p><b>Note:</b> You can specify the PSR Result status only when both objects (parent and child) are assigned a workflow on the Cover Page tab.</p>
<b>PSR Type</b>	Automatically	The type of the PSR
<b>PSR Number</b>	Manually; when you enter the PSR number	The related PSR number.
<b>PSR Category</b>	Automatically	The quality incident category of the related PSR.
<b>PSR Customer</b>	Automatically	The customers associated with the related PSR.
<b>PSR Supplier</b>	Automatically	The suppliers associated with the related PSR.
<b>PSR Severity</b>	Automatically	The severity of the related PSR. The Agile PLM administrator defines the severities.
<b>PSR Disposition</b>	Automatically	The way the PSR was resolved.
<b>PSR Expected Resolution Date</b>	Automatically	The date you expect the resolution for the related PSR.
<b>PSR Quality Analyst</b>	Automatically	<p>The quality analyst assigned to the related PSR.</p> <p>If you define the workflow to notify the default quality analyst, the department user in this field receives notifications about the PSR</p>
<b>PSR Workflow</b>	Automatically	The name of the workflow used to move this PSR through the quality tracking process.




PSR Status	Automatically	The workflow status of the related PSR. If you do not select a workflow, this field is Unassigned.
PSR Originator	Automatically, when created	The default creator of the PSR.
PSR Date Originated	Usually automatically, when created	The date when you create the related PSR.
PSR Date Submitted	Usually automatically, when created	The date when you submit the related PSR.
PSR Date Released	Usually automatically, when created	The date when you release the related PSR.
PSR Final Complete Date	Usually automatically, when created	The date when you complete the related PSR
Aggregate PSR Number	Automatically filled in when PSRs are added to the Related PSR tab.	Field filled in automatically with the parent PSR number.

**Note** The Event field indicates the  Ascending or  Descending order of the table, depending on the sort order you choose in the Personalize menu.

**Note** The Personalize menu enables you to create and customize Views. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views.

## Adding Related PSRs to the Parent PSR

### To add Related PSRs to the Parent PSR in Java Client:

1. Open a PSR and click the Related PSR tab.
2. Click  and choose one of the following options. The Create  button allows you to create objects and the Search  button allows you to search for existing objects.

### To create objects:

1. Select a type from the Type list. Enter an object number and a description.
2. Click OK.

The object appears on the Related PSRs table.

### To search for one or more existing objects:

1. In the Add Related Objects dialog box, select a search method.

2. To perform a simple search, enter the value to search for and click Search. You can also define an Advanced Search, run a Saved Search, select a Bookmarked object, or select from the Recently Visited folder (Shortcut).
3. Select the objects from the search results. Use the right arrow or double-click to move it to the Select Related Objects column.
4. To select different revisions of objects or edit other fields, ensure to check the Edit rows after adding check box.
5. Click OK.



The object appears on the Related PSRs table.

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

**Note** If you click the Add icon without selecting the list, you see the Add Related PSR (Search) dialog box.

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
#### To add Related PSRs to the Parent PSR in Web Client:

1. Open a PSR and click the Related PSR tab.
2. In the Related PSR table, click Add.
  - Click the Search to Add  button to launch a palette to search for existing PSRs.
  - Click the Create to Add  button to create new PSRs to add to the Related PSR tab.
  - Select a PSR from the Recently Visited folder, drag and drop it in the Related PSRs table.
  - Copy a PSR existing on one PSR and paste it in the Related PSR table of another PSR.

#### To search for existing objects:

1. Click the Search to Add  button to launch a palette to search for existing PSRs. (Alternately, press the Ctrl +L key combination).
2. Enter the value or \* to search for and click the Execute a Quick Search  button.
3. Select a PSR from the list that appears. To move it to the Related PSR table and either:
  - Drag and drop it.
  - Double-click on it.
  - Press Enter.
4. Click the Close  button to close the dialog box.  
The object appears on the Related PSR table.

#### To create new objects:


1. Click the Create to Add  button to create new PSRs.
2. In the Type field, select an object from the list.
3. In the Number field, enter a number or click the Autonumber  button.
4. Enter details in the Description field.

5. Click Add to add the object to the table or click Cancel to return to the Related PSR table.  
The object appears on the Related PSR table.

## Editing Items on the Related PSRs tab

You can modify the information in the fields of the Related PSRs tab, provided you hold appropriate privileges.

### To edit Related PSRs in Java Client:

1. Open a PSR and click the Related PSR tab.
2. On the Related PSR table, select the row you want to edit.
3. Click the Edit  button to edit the row.
4. Double-click the cell you want to edit.
5. Use the list to select values and edit required fields.
6. Click OK.

### To edit Related PSRs in Web Client:

1. Open a PSR and click the Related PSR tab.
2. On the Related PSR table, select the row you want to edit.
3. Double-click the cell you want to edit

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**Note** If you are not able to open a cell, a message bar displays that you cannot edit the field.

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4. Use the list to select values and edit required fields.
5. Click Save to save changes.

---


**Note** The PSR Event drop-down list shows the available statuses of the Parent PSR. You can select the statuses of the parent and the related PSR, such that when the Parent PSR reaches the status in the PSR Event field, the related PSR moves to the status in the PSR Result field.

**Note** For example, if you set the PSR Event field to Closed and the PSR Result field to Closed, once the Parent PSR reaches the Closed status, the related (child) PSR moves automatically to the Closed status.

---

## Removing Related PSRs

### To remove Related PSRs in Java Client:

1. Open a PSR and click the Related PSR tab.
2. Select the PSR you want to remove.
3. Click the Remove  button.

A dialog prompts you to remove the related PSR after confirmation.

**To remove Related PSRs in Web Client:**

1. Open a PSR and click the Related PSR tab.
2. Select the PSR you want to remove.
3. Click Remove.

A message bar displays the number of rows removed from the table.

---

**Note** The number of the Parent PSR does not appear in the Aggregate PSR Number field on the Cover Page of the PSR.

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## Relationships tab

The Relationships tab allows you to create relationships between the current PSR or a QCR and other routable and lifecycle objects. The relationship is visible on Relationships tab of both the objects. You can specify a rule between the objects, which is optional.

Relationships tab of Agile objects have the option to specify a rule between the objects. When you position the cursor on the PSR/QCR, it displays a Quick View info link. A click on the Quick View dialog provides substantive information without having to navigate to the object. The message bar displays the Add rule link and (if you specify a rule) displays it in the Web Client. Once you specify a rule, the Edit Rule and Remove Rule links appear on the message bar. Specific objects display tables with related views and actions that you can perform.

## Relationships - Table

The Relationships table lists all the Agile objects. In the Relationships table:

Exists - Indicates that the functionality exists for that class and its subclasses.

In the Relationship with a Rule column:

Yes - Indicates you can add the functionality to its class and subclasses.

No – Indicates that it does not support the functionality.

In the Event/Result column:

Workflow - indicates the event /result for a class object, based on the workflow state of that object.

Lifecycle - indicates the event/result for a class object, based on Lifecycle state of that object.

Agile Base Class	Agile Classes	Event/Result	Relationship with a Rule	References-Relationship with no rule	Lifecycle under Change Control
Changes	Change Orders	Workflow	Exists	Exists	NA

	Change Requests	Workflow	Exists	Exists	NA
	Deviations	Workflow	Exists	Exists	NA
	Manufacturers Orders	Workflow	Exists	Exists	NA
	Price Change Orders	Workflow	Exists	Exists	NA
	Site Change Orders	Workflow	Exists	Exists	NA
	Stop Ship	Workflow	Exists	Exists	NA
Customers	Customers	Lifecycle	Yes	Exists	No
Declarations	Homogeneous Material Declaration	Workflow	Exists	Exists	NA
	IPC 1752-1 Declarations	Workflow	Exists	Exists	NA
	IPC 1752-2 Declarations	Workflow	Exists	Exists	NA
	JGP SSI Declarations	Workflow	Exists	Exists	NA
	Part Declarations	Workflow	Exists	Exists	NA
	Substance Declarations	Workflow	Exists	Exists	NA
	Supplier Declaration of Conformance	Workflow	Exists	Exists	NA
File Folders	File Folder	Lifecycle	Yes	Exists	No
Items	Documents	Lifecycle	Yes	Yes	NA
	Parts	Lifecycle	Yes	Yes	NA
Manufacturer Parts	Manufacturer Parts	Lifecycle	Yes	Yes	NA
Manufacturer	Manufacturer	Lifecycle	Yes	Yes	No
Packages	Packages	Workflow	Yes	Yes	

Part Groups	Part Groups	Lifecycle	Yes	Yes	No
Prices	Published Process	Lifecycle	Yes	Yes	Yes
	Quote Histories	Lifecycle	Yes	Exists	Yes
PSRs	Non Conformance Reports	Workflow	Exists	Exists	NA
	Problem Reports	Workflow	Exists	Exists	NA
Programs	Activities	Workflow	Exists	Exists	NA
	Gate	Workflow	Exists	Exists	NA
QCRs	Audit	Workflow	Exists	Exists	NA
	CAPA	Workflow	Exists	Exists	NA
Requests for Quotes	Requests for Quotes	Lifecycle	Yes	Yes	No
RFQ Response	RFQ Response	Lifecycle	Yes	Yes	No
Sites	Sites	Lifecycle	Yes	Yes	No
Sourcing Projects	Sourcing Projects	Lifecycle	Yes	Yes	No
Specifications	Specifications	Lifecycle	Yes	Yes	No
Substances	Materials	Lifecycle	Yes	Yes	No
	Sub Parts	Lifecycle	Yes	Yes	No
	Substances	Lifecycle	Yes	Yes	No
Suppliers	Suppliers	Lifecycle	Yes	Yes	No
Transfer orders	Automated Transfer Orders	Workflow	Yes	Yes	NA
	Content Transfer Orders	Workflow	Yes	Yes	NA

User Groups	User Groups	None	No	Yes	NA
Users	Users	Status Attribute	No	Yes	NA
Action Items	Action Items	Status Attribute	No	No	NA
Discussions	Discussions	None	No	Yes	NA
Reports	Custom Reports	None	No	No	NA
	External Reports	None	No	No	NA
	Standard Reports	None	No	No	NA

## Relationships in PQM

This is some additional information about relationships as they are used in the PQM solution:

**Important** When relationships are created between PQM objects, a blank rule is created for the relationship. You must edit the blank rule to define how you want the PQM objects to affect each other.

- When a QCR affects the PSR, that is, when a QCR and PSR are related and the relationship rule follows the format:

*When <QCR source object> is <event>, set <PSR target object> to <result>*

all items from the PSR Affected Items tab are displayed on the PSR Items table of the QCR. If the PSR was used to aggregate multiple PSRs, then the related PSRs' affected items are displayed.

- When this QCR is affected by a PSR, that is, when the QCR and the PSR are related and the rule follows the format:

*When <PSR source object> is <event>, set <QCR target object> to <result>.*

all items from the PSR Affected Items tab and the related PSR's affected items are *not* displayed on the PSR Items table of the QCR.

## Attributes of a Relationship

When you add an object to a project as a deliverable, you add the project on the relationship tab of that object as well. You can define a relationship rule between these two objects and view the rule from both objects.

- When you add an object as a relationship to the second object, it creates a reverse relationship

and displays the second object under the Relationships tab of the first object.

- There are no default relationship rules between two objects.
- When you add a relationship to an object that has a revision:
  - The name field of parts or documents shows the object name or number only if the rule is pending. Click the object name or number. In the editable fields, enter text or use the lists. The revision displays the latest revision.
  - The object revision displays in the name field when the rule is met, (i.e. the lifecycle of the event has occurred).
  - For example, if the triggering event is when the lifecycle moves to Production, then you see the first revision of the production phase here.
  - The name field value is hyper-linked and links to the cover page for revision.
  - In Java Client, to add, edit or remove a rule, click the Add Rule, Edit Rule or Remove Rule button respectively.
  - In Web Client, a message bar displays the rule. You can also use the edit and remove rule links to edit and remove the rule.
  - Attachments related to folders display folder version when the set criteria is met.

For details, see the 'Relationships' chapter in the *Getting Started with Agile PLM* guide.

## Relationships tab Tools

The Relationships tab has the following buttons:

- Add: Allows you to add objects.
- Remove: Allows you to remove objects.
- Edit Rule: Allows you to add a rule or edit the rule.
- More: Contains more actions that you can perform. (copy, paste, fill-down, fill-up)



The Relationships tab page includes the Views and Personalize buttons. The Personalize menu enables you to create and customize Views. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views.

See also: [Relationships Table](#) on page 42



For details, see 'Navigating in the Agile Web Client' in the *Getting Started with Agile PLM* guide.

## Relationships Table

The Relationships table lists the following columns by default:

Field	Completed	Indicates
Criteria Met (image)	Automatically. When you meet relationship rule of the objects added.	Indicates when the added object attains the specified status. Once you meet the criteria, you see the symbol  in the Web Client and  in the Java Client.

Type (Image)	Automatically	The type (image) of the object you add.
Name	Automatically	The name of the object
Description	Automatically	The description of the object you add with the number. For example, (PR00054).
Current Status	Automatically when you add the object.	The current status of the related object.
Rule	Automatically when you add the rule	Displays the rule specified. <b>Note:</b> You can specify <b>Rule</b> only if you assign a workflow to the PSR.
Type	Automatically	The type of the added object. (For example, Problem Report)




**Note** The Name field indicates the  Ascending or  Descending order of the table, depending on the sort order you choose in the Personalize menu.

**Note** The Personalize menu enables you to create customized Views. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can choose the required view from the list of available views.


## Adding Objects to the Relationship tab of a PSR

You can add any of the Agile objects to a Relationships table. The Administrator needs to set appropriate privileges to define Relationships between Agile objects.

### To add objects to the Relationships table in Java Client:

1. Open a PSR and click the Relationships tab.
2. Click the Add  button in the Relationships table. The Create  button allows you to create new objects and the Search  button allows you to search for one or more existing objects.

### To create objects:

1. Select a sub-class from the Type list.
2. Enter a number or click the Autonumber  button.
3. Click OK.

The object appears on the Relationships tab.

### To search for existing objects:



1. In the Add Relationship dialog box, select a search method.
2. To perform a simple search, enter value to search for and click Search. You can also define an Advanced Search, run a Saved Search, select a Bookmarked object, or select from the Recently Visited folder (Shortcuts).
3. Select the items from the Search Results. These can be PSRs, QCRs, or Changes. Use the

right arrow or double-click the selected object to move it to the Select Related Objects column.



4. The selected object appears in the Select Related Objects column.
5. To select different revisions of items or edit other fields, ensure to select the Edit rows after adding check box.
6. Click OK.

The selected object appears on the Relationships table.

#### To add objects to the Relationships tab in Web Client:

1. Open the PSR and click the Relationships tab.
2. Click the Add drop-down menu.
  - The Search to add  button allows you to search for existing objects.
  - The Create to add  button allows you to create new objects.
  - Select an object from the Recently Visited folder, drag and drop it in the Relationships table.
  - Copy an object existing on a PSR and paste it in the Relationships table of another PSR.


#### To search for existing objects:

1. The Search to add  button allows you to search for existing objects. (Alternately, press the Ctrl +L key combination). You can search for PSRs, QCRs, Items, or Changes.
2. Enter the value or \* to search for and click the Execute a Quick Search  button.
3. Select an object from the list.
4. To move it to the Relationships table, you can either:
  - Drag and drop it
  - Double-click on it.
  - Press Enter.

5. Click the Close  button to close the dialog box.

The object appears on the Relationships table.

#### To create objects:


1. Select a sub-class from the Type list.
2. In the Number field, enter a number or click the Autonumber  button to generate a number.
3. Enter details in the Description field.
4. Click Add to add the object to the table or click Cancel to return to the Relationships PSR table.

The object appears on the Relationships table.

## Editing the Relationships table

You can edit the Relationships table to include additional information or modify existing information.

**To edit the Relationships table in Java Client:**

1. Open a PSR and click the Relationships tab.
2. Select the row you want to edit.
3. Click the Edit Relationship  button.
4. Modify required fields.
5. Click OK.

The modified values appear on the table.

**To edit the Relationships table in Web Client:**


1. Open a PSR and click the Relationships tab.
2. Double-click the field you want to edit.
3. Modify required fields.
4. Click Save.

The modified values appear on the table.

## Removing Relationships

You can remove an object on the Relationships tab if found to be inappropriate. Removing a relationship from the Relationships tab of an object also removes it from the Relationships tab of the object to which it is related.

**To remove Relationship in Java Client:**

1. Open a PSR and click the Relationships tab.
2. Select the object row you want to remove.
3. Click the Remove Relationship  button.

The object does not appear on the Relationships table.

**To remove Relationship in Web Client:**

1. Open a PSR and click the Relationships tab.
2. Select the object row you want to remove.
3. Click the Remove button.

A message bar displays the number of rows that have been removed. The object does not appear on the Relationships table.

## Relationship Rules

The Relationship rule specifies how the workflow you define for an object affects the workflow status of another object. For example, When PR0048 is Submitted, Set PR00049 to Review.

- A lifecycle object can only be a source and not a target of a relationship.

A lifecycle object can only be a source and not a target of a relationship. When you add a relationship from a lifecycle object to a workflow object, the state of the lifecycle affects the state of the workflow object.

For example, the relationship rule is defined between a Problem Service Request (workflow object) PR00061 and a (workflow object) Engineering Change Order. The rule says that, When PR00061 is Released, Set the Engineering Change Order to Released. Fix the positions of the "From Object" (PR00061) and the "To Object" (Engineering Change Order) in the rule so that the rule only affects workflow objects.

When you add a relationship from a workflow object to a lifecycle object, the state of the lifecycle objects affects the state of the workflow object and not the reverse way.

- When you add a relationship from a workflow object, you can define a relationship rule to another workflow object in both directions.

For example, in a relationship between two workflow objects – QCR QCR12345 and PSR PR55768 the When drop-down will list two objects – QCR12345 and PR55768, the Set drop-down will also have the same two objects. You cannot select the same object in both, When and Set. When you select an object from When list the Set field will be upgraded with another object.

The relationship should be viewable from both the objects and the rule displayed must be the same.

- You cannot define a relationship rule between two lifecycle objects.

You can only define a relationship rule only between a lifecycle object and a workflow object and not between two lifecycle objects.

## Adding Relationship Rules


The Relationships tab has the option to associate a rule between objects. Specific objects display tables with related views along with the actions that you can perform on the related object.

For example, if you add Items to the Relationships tab, the table displays an Affected Items table with the Item Number and Item description fields. The number field is a hyper-link.

To access more information about this object, click the Quick View info link. This appears when you position the cursor on the corresponding object and allows you to view details of the object and perform some actions without navigating to the actual object.

The message bar in the Quick View dialog displays the Add Rule link, which allows you to specify a rule. Once you specify a rule, the Edit Rule and the Remove Rule links also appear.

### To add a Relationship rule in Java Client:

1. Open a PSR and click the Relationships tab.
2. Select the PSR row you want to add a rule in.
3. Click the Add Rule  button.
4. A Relationship Rule dialog opens. Specify a rule.

For example:

When PR0002 is Review

Set PR123304 to Submitted.

5. Click OK.

The rule appears in the Relationship table of the corresponding object.

#### To add a Relationship Rule in Web Client:


1. Open a PSR and click the Relationships tab.
2. On the Relationships table, you can either use the Edit Rule button to add a Rule or click the Quick View info link that appears when you position the cursor on the PSR.
3. A dialog appears. A message bar displays the Add rule link or the rule (if specified).
4. Click the Add Rule link.
5. The Relationships Rule dialog opens. Specify a rule.

For example,

When Problem Report PR000142 is Review  
Set Problem Report PR00144 to Submitted.

6. Click Save.

The rule appears on the message bar.

7. Click the Close  button to close the palette.


Alternately, you can use the Edit Rule button to add a rule.

The rule appears in the Relationships table of the corresponding object.

## Editing Relationship Rules

You can modify the rule of an object on the Relationships table. Use either the Edit Rule button on the Relationships table or the Edit Rule that appears in the Quick View dialog message bar.

#### To edit the Relationship rule in the Java Client:

1. Open a PSR and click the Relationships tab.
2. Select a row on the Relationships table you want to edit.
3. Click the Edit Rule  button.
4. In the Relationships Rule dialog, modify the rule.
5. Click OK.


The modified rule displays on the Relationships table.

#### To edit the Relationship rule in the Web Client:

1. Open a PSR and click the Relationships tab.
2. You can either:
  - Click the Edit Rule button.
    - In the Relationships Rule dialog, modify the rule.
    - Click Save to save the changes.

Click the Quick View info link that appears when you position the cursor on the PSR.

- Click the Edit Rule link.
- In the Relationships Rule dialog, modify the rule.
- Click Save to save the changes.


3. Click the Close  button to close the palette.

The modified rule displays on the Relationships table.

## Removing Relationship Rules

You can remove the rule associated with the relationship, if not applicable. In the Web Client, once you specify a rule, the message bar on the Relationship dialog displays the Remove Rule link.

### To remove the relationship rule in Java Client:

1. Open a PSR and click the Relationships tab.
2. Select the row on the Relationships table, which contains the rule.
3. Click the Remove Rule  button. A dialog confirms removal of the rule.

The rule does not appear in the Rule column.

### To remove the relationship rule in Web Client:

1. Open a PSR and click the Relationships tab.
2. Click the Quick View info link, which appears when you position the cursor on the PSR.
3. In the dialog that opens, click the Remove Rule link.

Alternately, use the Edit Rule button on the Relationships table to remove the rule.

The rule does not appear in the Rule column.

## Filter

Filters narrow down the objects in the Relationships tab of PSRs by the rule they contain. You can filter relationships with the attributes you configure using the filter option. The Relationships tab of the Java Client includes the Filter button. In the Web Client, use the Personalize menu to filter relationships.

In the Java Client, the default View options consist of 4 values:

### All Relationships

This filter allows you to filter all the relationship objects in the table.

### Complete


This filter allows you to filter all the objects for which the rule criteria are met.

### Pending

This filter allows you to filter objects for which the rule criteria are not met.

### Rule not specified

This filter allows you to filter objects for which there are no rules specified.

Click the Show Filter  button. An additional row appears above the Relationships table. You can filter using the following attributes:

- Criteria Met - Filters relationships where the set criteria are met.
- Name - Filters relationships by names.
- Description - Filters relationships by the description.
- Rule - Filters relationships by rules.
- Type - Filters relationships by the types.

In the Web Client, the Views menu on the upper right helps you create views using the Personalize menu. The Personalize menu allows you to filter relationships. Define filter criteria based on the options in the Table Personalization palette.

Additional attributes listed below help filter relationships further.

- Criteria Met - Filters relationships where the set criteria are met.
- Name - Filters relationships by names.
- Description - Filters relationships by the description.
- Current Status - Filters using the current status.
- Rule - Filters relationships by rules.
- Type - Filters relationships by the types.

For details on Views and Personalize menus, see the *Getting Started with Agile PLM* guide.

## Workflow tab of a PSR

An Agile PLM workflow is a sequence of statuses that a routable object goes through in the quality control process. The Workflow tab displays a flowchart of the workflow you select on the Cover page.

The Workflow tab page displays two sections:

1. Summary - lists sign-off information for the current status. This section is visible for review or release statuses.
2. Workflow - displays the chart of the current workflow. This section is visible for all changes to which you assign a workflow.

Colors represent the status of the workflows:

- Green - Previous Performed Status
- Orange - Current status
- Blue - Future status

The Sign-Off History table displays past workflow and sign-off information for the PSR. For example,

you can route a PSR:

- internally for preliminary investigation
- to a manager for escalation to identify if it merits a corrective action
- to the support call center/ field service technician who can provide a detailed information
- to the customer for final approval of an implemented fix
- to a supplier for a response to the incident, and so on.

The Personalize menu enables you to create and customize Views. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views. The Add Reviewers / Remove Reviewers buttons allow you to add/remove Approvers and Observers.

For details, see the 'Routing Objects with Workflows' chapter in the *Getting Started with Agile PLM* guide.

Shown below is a view of the workflow statuses available for a PSR. The workflow of a Problem Report is similar to the workflow of a Non-Conformance Report.



## Submitting and Routing PSRs

You can create routable objects from classes that represent processes. For example, a change in the change control process, or a product service request. Route objects to Agile PLM users for approval via workflows. Use the Next Status button on the Cover Page of the PSR to route objects. Routing managers oversee the routing and approval process of objects, evaluate and assign routable objects and receive e-mail notifications. Quality Analysts are the default routing manager for PSRs.

For details, see 'Routing Objects with Workflows' in the *Getting Started with Agile PLM* guide.

## Attachments tab of a PSR

An Attachment contains supportive data in the form files, documents, drawings, images. You can reference files and URLs from the Attachments tab of all Agile PLM objects. You can track and search attachment files and URLs, and also add files to an automatically created object called a file folder - an object of reference information from the File Folders class.

The actual attachment files are stored in the Agile File Manager, referred to as the file vault. Attachments may contain information that describes the object or a process. For example, if a specification describes a part or subassembly, it might have the following attachment files:

- Drawing files (such as CAD drawings) or scanned image files in viewable formats
- Files such as documents, non-viewable files, compressed (ZIP) files, and so on

Attachments tab actions allow you to add, delete, open, view, print, or get a copy of the attachment file. You can also check in and check out attachments (although you are actually checking file folder

objects in and out).

---


**Note** The Personalize menu enables you to create and customize Views. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views.

---

Also see 'Working with Attachments' chapter in the *Getting Started with Agile PLM* guide.

## Adding Attachment Files to a PSR

### To add an Attachment file to a PSR in Java Client:

1. Open a PSR and click the Attachments tab.
2. Click the Add Files  button.
3. In the File Uploader dialog, click the Browse for Files button.
4. Select a file you want to add and double-click on it.
5. Click the Options arrow.
6. Select the Type of file from the list.
7. Check the following options as required:
  - Unzip all zipped files upon upload.
  - Add all files to a single File Folder.
  - Edit rows after adding.
8. Click Upload.

A message prompts you to delete uploaded files from your local disk.

The file appears on the Attachments table.

### To add an Attachment file to a PSR in Web Client:

1. Open a PSR and click the Attachments tab.
2. Select Files / URLs / By Search from the list on the Add button.
3. Choose Add Files. Before the Add Files dialog appears, a File Upload and Download Method dialog opens.
  - Select Use standard browser capabilities / Use Java Upload / Download tool.
  - Click OK.
  - Use the Browse button to locate files in the Add Files dialog.
  - A file folder containing the attached files is created. To add selected files in one file folder, select the Add all files to a single file folder check box, or else a file folder is created for each file selected.
  - Click Add.

The filename and file folder objects appear in the Attachments table.


4. Choose URLs. The Add URLs dialog appears.
  - To add selected URLs in a single file folder, select the Add all URL's to a single file folder

checkbox or else a separate file folder will be created for each URL.

- Click Add.

The URLs and the file folder objects appear in the Attachments table.


5. Choose By Search. The Add Files dialog appears.

- In the Add Files palette, enter '\*' wildcard and search for files or URLs. You can also choose the latest version of the files.
- To move the selected file to the Attachments table, you can either:
  - Drag and drop it
  - Double-click the file
  - Select the file and press Enter
  - Enter the URL address. Alternately, you can also copy and paste an URL.
  - A table at the base displays the selected objects and corresponding files attached.
- Click the Close  button or hit the Esc button to close the palette.

The file / URL and the file folder objects appear in the Attachments table.

## Removing Attachment Files from a PSR

### To remove Attachment Files from a PSR in Java Client:

1. Open a PSR and click the Attachments tab.
2. Select the File / URL you want to remove.
3. Click the Remove  button.

The File / URL no longer appears on the Attachments tab.

### To remove Attachment Files from a PSR in Web Client:

1. Open a PSR and click the Attachments tab.
2. Select the file or URL you want to remove.
3. Click the Remove button.

The File / URL does not appear on the Attachments table. A message bar displays the number of rows removed.

# Working with Quality Change Requests

In Product Quality Management, Quality Change Requests (QCR) creates and manages Audits and Corrective and Preventive Actions. The QCR allows you to aggregate problems into a routable quality record, perform an analysis of the cause of the failure and closes the problem using standard CAPA procedures.

This chapter includes the following topics:



- [Creating Quality Change Requests](#) on page 53
- [Cover Page tab of a QCR](#) on page 57
- [Affected Items tab of a QCR](#) on page 59
- [Relationships tab of a QCR](#) on page 61
- [Workflow tab of a QCR](#) on page 61
- [Attachments tab of a QCR](#) on page 63
- [Submitting and Routing a QCR](#) on page 63

## Creating QCRs

You can create QCR objects the same way you create other Agile PLM objects. You must have the necessary privileges to create QCRs. The Quality Administrator roles allow you to perform all the functions related to QCRs. For more details on Roles and Privileges, see the *Getting Started with Agile PLM* guide.

You can use the New Object button or the Save As feature to create a QCR.

### To create a QCR in Java Client:


1. Launch the Java Client.
2. Click the New Object  button. The New Object dialog box appears.
3. In the Type list, select a value.
4. In the QCR Number field, accept the number that appears, or enter a number, or click the Autonumber  button to generate a number.
5. Click OK.

Agile Java Client creates the QCR object and displays the QCR (Audit or CAPA) with the Cover Page tab in the edit mode.

### To create a QCR in Web Client:

1. Launch the Web Client.
2. From the main toolbar, click the Create New drop-down button. Select Quality Change Request >

Audit or Corrective and Preventive Actions. The Create New dialog appears.

3. In the Type field, select a value from the list.
4. In the QCR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
5. Click Save.

Agile Web Client creates the QCR and displays it with the Cover Page tab in the edit mode.

If you do not assign a workflow to the QCR, the QCR displays the Unassigned status.

**To assign a workflow to the QCR:**

1. Open a QCR and click the Edit button.
2. Select a workflow from the Workflow list. For details, see Workflow tab of a QCR.
3. Click Save.

The status of the saved QCR appears on the right corner of the page. For example, the assigned status can be - Prepared, Submitted, Review, or Released.

---

**Note** The system sends an audit reminder to the Originator and Quality Administrator before the audit date. If you have Modify privileges, you can configure the audit reminder date in the file.

---


## Creating a QCR using Save As

You can use Save As to create a QCR. The Save As feature creates a similar object with different values, since it copies data from a field in the existing object to the same field in the new object.

Do not use the Save As feature to create an object in a different class or subclass, since they may not include the same tabs/fields, and hence lose data.


**Warning** If a field or list value in the existing object is not available in the new object, then the system does not copy that field or list value to the new object.

**To create a QCR using Save As in Java Client:**

4. Open the QCR you want to use as the basis for the new QCR.
5. Right-click, and choose Save As. Alternatively, choose File and select Save As from the main toolbar. The Save As dialog box appears.
6. From the Type list, select an Audit or CAPA.
7. In the QCR Number field, accept the number that appears. You can also type a number or click the AutoNumber  button to generate a number.
8. Click OK.
9. Agile Java Client creates the QCR (Audit or CAPA) and displays the QCR with the Cover Page tab in the edit mode.
10. Modify required fields.

11. Click Save to save the changes.

**To create a QCR using Save As in Web Client:**

1. Open the QCR you want to use as the basis for the new QCR.
2. Click the Actions drop down menu.
3. Select Save As.
4. In the Save As dialog that appears, select Audit or CAPA from the Type list.
5. In the QCR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
6. Click Save.
7. The QCR opens displaying the Cover Page in edit mode. Modify required fields.
8. Click Save to save the changes.
9. The QCR appears displaying the Cover Page.

---

**Note** If the Agile PLM Administrator has set the appropriate preferences, the system copies fields in the optional Page Two and Page Three sections to the new object. For information about the behavior of Page Two and Page Three fields in your Agile PLM system, contact your Agile PLM Administrator. Since Page Three data applies only to a specific subclass, if you use the Save As feature to create a new object of a different subclass, the system does not copy Page Three data to the new object.

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To enable Save As preferences for Page Two and Page Three fields, refer Admin> Server Settings> Preferences - Save As Page 2 for Different Classes, Save As Page 3 for Different Classes, & Save As Page 3 for Different Subclasses, in the Java Client.


## Creating a QCR from an Item

You can create a QCR from a PSR or an individual Item. When you create a QCR from an Item to drive a problem to closure, you add:

- the Item to the Affected Items table of the QCR.
- the QCR to the QCRs table on the Quality tab of the Item.

After you approve the QCR, you can route the Item through the change to ensure you rectify the defect and change to the new revision of the Item.


**To create a QCR from an Item in Java Client:**

1. Open an existing an Item.
2. Right-click in the object window and choose Create a Quality Change Request from the drop-down menu.
3. Select the required sub-class Audit or CAPA from the Type list.
4. In the QCR Number field, accept the number that appears, enter a number, or click the Autonumber  button to generate a number.

5. Click OK.

Agile Java Client creates the QCR and displays it with the Cover Page in the edit mode.

**To create a QCR from a PSR or an Item in Web Client:**

1. Open an existing an Item. It opens displaying the Cover Page.
2. Click the Actions button on the Cover Page.
3. Choose Create New>Quality Change Request from the drop-down menu. The Create New dialog appears.
4. Select the required sub-class (Audit or CAPA) from the Type list.
5. In the QCR Number field, accept the number that appears, enter a number, or click the Autonumber  button to generate a number.



The Agile Web Client creates the QCR and displays it with the Cover Page in the edit mode.

The QCRs you create remain in the system until you delete them. Deleting QCRs does not remove them from Agile database. To delete a QCR permanently from the system you need to hard-delete them. For details on deleting QCRs, see [Deleting Agile Objects](#) on page 73.

## Creating a QCR from a PSR


Creating QCRs from PSRs allows you to tag corrective actions on to a Product Service Request. You can create a QCR using the Actions Menu in Web Client and the More button in Java Client.

**To create a QCR from a PSR in the Java Client:**

1. Open an existing PSR.
2. Click the More  button.
3. Select the Create Quality Change Request from the drop-down menu.
4. A New dialog appears. Select the required sub-class Type (Audit or CAPA).
5. In the QCR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.
6. Click OK.

The QCR opens in the edit mode.

**To create a QCR from a PSR in Web Client:**

1. Open an existing PSR.
2. Click the Actions menu.
3. Select the Create Quality Change Requests option.
4. A Create New dialog appears. Select the required sub-class (Audit or a CAPA) from the Type list.
5. In the QCR Number field, accept the default number, enter a number, or click the Autonumber  button to generate a number.

6. Click Save.

The QCR (Audit or CAPA) opens in the edit mode.

## Cover Page tab of a QCR

The following table lists and describes the fields on the Cover Page tab of a QCR.

Field	Completed	Indicates
QCR Number	Automatically, when created	The number you assign to a QCR, when you create it.
QCR Type	Automatically, when created	The type of subclass you select when you create the QCR.
Category	Manually	A list of categories defined by the Agile PLM Administrator.
Description	Usually manually, can contain a default.	Describes the QCR. Maximum number of bytes is set by the Administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).
Reason	Usually manually; can contain a default	Reason for creating the QCR. Maximum number of bytes is set by the Administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).
Customer	Manually.	The Customer associated with the QCR.
Supplier	Manually	The list of Suppliers associated with the QCR.  For example, Suppliers can initiate a SCAR if they need to resolve issues in the process, products or other areas.
Workflow	Usually selected manually. If you do not assign a Workflow to a QCR it remains in the Unassigned state.  You are prompted to select a Workflow, if you move the QCR to the next status without assigning a Workflow. You can change the workflow selection as long as the QCR is in the Pending status type.	The name of the workflow used to move this QCR through the quality control process.

<p><b>Quality Administrator</b></p>	<p>Select from a list. In the list, Departments appear first, followed by individual user names.</p>	<p>The default Quality Administrator.</p> <p><b>Note:</b> If you prefer another QA over default QA , the system displays a message " Quality Administrator selected is not one of the defaults. The default Quality Administrator list includes: Default QA UserName(Userid), "</p> <p>If you define the workflow to notify the default quality administrator, the user groups or user in this field receives notifications about the QCR. If this field is blank, then the system sends notifications to every quality administrator on the list. If the notification definition in the workflow is blank, the system does not send notifications.</p>
<p><b>Status</b></p>	<p>Automatically, when created. Updates as the QCR moves through the assigned workflows.</p>	<p>Workflow status. If you do not select a workflow this field displays the <b>Unassigned</b> status.</p>
<p><b>Originator</b></p>	<p>Usually automatically, when created (with the default set by the Agile PLM Administrator).</p>	<p>The originator or creator of the QCR.</p>
<p><b>Date Originated</b></p>	<p>Usually automatically, when created.</p>	<p>The date you create the QCR</p>
<p><b>Date Submitted</b></p>	<p>Automatically generated based on workflow status.</p>	<p>The date when the QCR moves to the Submitted status in the workflow.</p>
<p><b>Date Released</b></p>	<p>Automatically generated based on workflow status.</p>	<p>The date when the QCR moves to the first released status in the workflow.</p>
<p><b>Final Complete Date</b></p>	<p>Automatically when the QCR enters the Complete type status.</p>	<p>The date the QCR moves to the Complete status type.</p>
<p><b>Preventive Action</b></p>	<p>Usually manually; can contain a default.</p> <p>Maximum number of bytes is set by the Agile PLM administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).</p>	<p>A pro-active action taken to prevent the problem from happening again. Applies only to CAPAs.</p>
<p><b>Root Cause Analysis</b></p>	<p>Manually.</p> <p>Maximum number of bytes is set by the Agile PLM administrator; can be up to 4000 bytes, including spaces and carriage</p>	<p>The root cause of the problem. Applies only to CAPAs.</p>

	returns (which count as two bytes).	
<b>Planned Audit Date</b>	Manually	Date planned to audit the problem.
<b>Audit Result</b>	Usually manually, can contain a default.  For example, when you implement a CAPA, the Quality Analyst performs an Audit to ensure the CAPA really solved the problem. If the fix for the problem is validated, then the result is pass. Otherwise it fails, and the Quality Analyst updates the <b>Audit Result</b> field.	Audit process result. The default setting for the audit result is Pass/Fail. For more details on other settings contact the Agile Administrator.
<b>Product Line(s)</b>	Usually manually; can contain a default.	List of product lines defined by the Agile Administrator.

## Updating the Cover Page of a QCR

After you create a QCR, you can modify it to provide additional information you did not include when you created it or edit any information that has changed since its creation.

### To update the Cover Page of a QCR (Java Client and Web Client):

1. Open the QCR you want to edit.
2. Click the Edit button.
3. Modify required fields. You can either enter text; use the drop-down lists or the palettes to edit the QCR.
4. Click Save to save changes.

---

**Note** In Web Client, once you edit a QCR and save it, a message bar displays that the changes have been successfully saved.

---

The Cover Page displays updates of the QCR.

## Affected Items tab of a QCR

The Affected Items table lists the items affected by the QCR. The Affected Items tab of a QCR includes the Affected Items tables and the PSR Items tables.

The table below lists and describes the default fields on the Affected Items tab.

Field	Completed	Indicates
Item Number	Automatically, when created.	Number of the Affected Item
Item Description	Automatically, when created.	Description of the Item.
Item Rev	Manually	The revision of the Affected Item in which you find the problem.  For example, if the Item has undergone five revisions, and you identify the defect in revision B, then the Item Rev field displays B.  <b>Note:</b> You can add multiple copies of an Item with the same revision number to the Affected Items tab of a QCR.
Affected Site	Automatically, when created.	The site where you find the problem.
Image	Automatically, when created.	The presence of a PSR Item.

The Affected Items tab page includes the Affected Items and the PSR Items table. The Views and Personalize menus appear on both these tables.



**Note** The Personalize menu enables you to create and customize Views. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views.

The PSR Items table lists Items referenced by problem reports and non-conformance reports associated with this QCR. This table populates itself when the Relationship Rule has the QCR affect the PSR.

- Associate a PSR with the QCR by adding the PSR to the QCR Relationships tab and adding a Rule where the QCR affects the PSR.
- Associate a PSR with the QCR by adding the QCR to the PSR Relationships tab and adding a Rule where the QCR affects the PSR.
- Create a QCR from a PSR.

The table below lists the default fields on the PSR Item table of the Affected Items tab.

Field	Completes	Indicates
Item Number	Automatically, when created	Number of the Affected Item
Item Description	Automatically, when created	Describes the Item
Item Rev	Manually	The revision of the Affected Item in which you find the problem.
Affected Site	Automatically, when created	The site at which you find the problem.
PSR Number	Automatically, when created	The number of the PSR associated with the QCR.

**Note** The Item Number field indicates the  Ascending or  Descending order of the table, depending on the sort order you choose in the Personalize menu.

## Relationships tab of a QCR

The Relationships tab allows you to create relationships and dependencies between the current QCR and other routable/ lifecycle objects.

When you create a QCR from a PSR the system copies the:

- PSR to the Relationships table of the QCR.
- QCR to the Relationships table of the PSR.

You can set the event trigger to move the PSR to a specific status in the workflow when the QCR event occurs.

The Relationships tab of a QCR is similar to that of a PSR. See also: [Relationships tab](#) on page 38.

For details, see the *Getting Started with Agile PLM* guide.

## Workflow tab of a QCR

The Workflow tab displays a flowchart of the workflow you selected on the Cover Page. An Agile PLM workflow is a sequence of statuses that a routable object follows as it goes through the different statuses in quality control process. The status with the orange background (Web Client) or the yellow background (Java Client) is the current status. The Signoff History table displays past workflow and signoff information for the QCR.

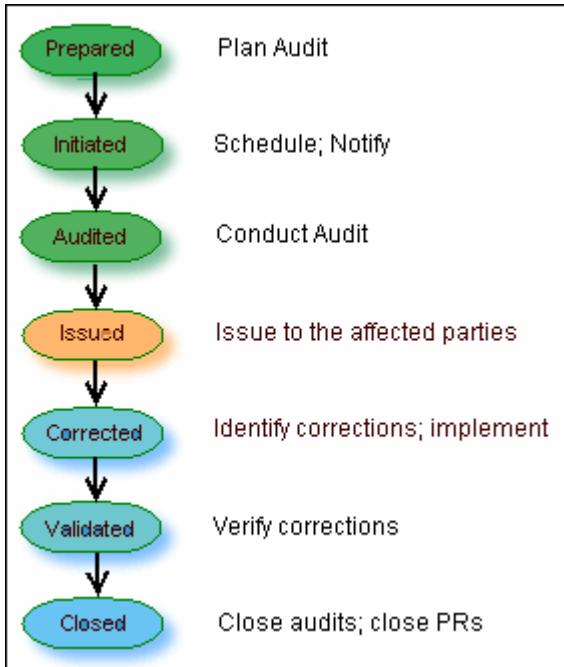
The Workflow tab page includes the Views and Personalize buttons. For details on Views and Personalize menus, see the *Getting Started with Agile PLM* guide.

---

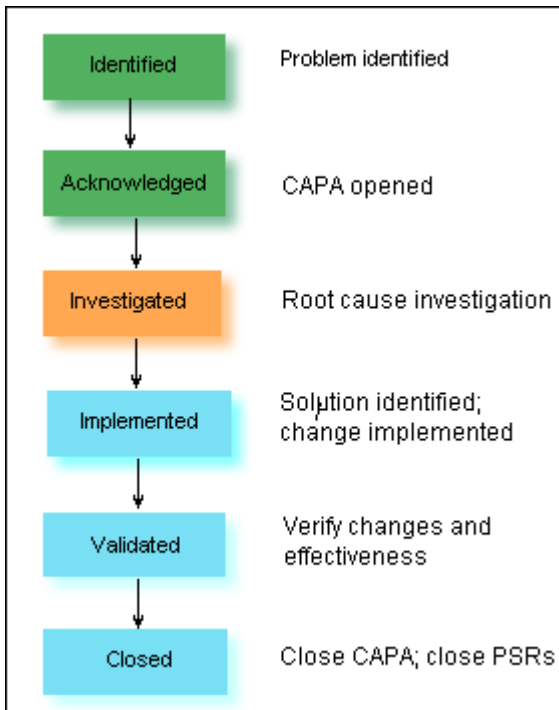
**Note** Notice that the Default Audits and Default CAPAs workflow statuses are different from those for other routable objects.

---

The status of the audit workflow begins with Prepared state and that of the CAPA with the Identified state.



The table below represents the status of a default CAPA.



For details, see the 'Routing objects with Workflows' chapter in the *Getting Started with Agile PLM* guide.

## Submitting and Routing a QCR

You can submit QCRs using the Next Status button. The process is the same as for submitting other routable objects. Before switching the QCR to a different status, always audit the routable object to detect any errors that may prevent switching to a different status. When you submit a QCR, you also notify the Quality Administrator by email. The Quality Administrator can also use the defined searches in the Workflow Routings area of the Inbox or the Quality Searches folder to find recently submitted QCRs.

For details, see 'Routing Objects with Workflows' in the *Getting Started with Agile PLM* guide

## Attachments tab of a QCR

You can reference files and attachments from the Attachments tab of a QCR. The Attachments tab of a QCR is similar to that of the PSR. For details, see [Attachments tab of a PSR](#) on page 50.



# Managing Product Service Requests

### This chapter includes the following:

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▪ Approving /Rejecting a Product Service Request.....	65
▪ Closing a PSR .....	66
▪ Actions menu in PSR.....	66
▪ Audit Status of a PSR.....	67
▪ Audit Release of a PSR .....	67

This chapter includes the following topics:

- [Approving/Rejecting a Product Service Request](#) on page 65
- [Closing a PSR](#) on page 66
- [Actions Menu in a PSR](#) on page 66
- [Audit status of a PSR](#) on page 67
- [Audit Release of a PSR](#) on page 67

## Approving /Rejecting a Product Service Request

To approve or reject a PSR, you must be an Approver for the PSR and hold the PSR Administrator role. See your Agile Administrator if you need additional privileges.

### To approve a PSR:

1. Open a PSR. (Ensure that it is in the Review or Released status).
2. Click the Approve button above the tabs. The Approve to Review dialog appears.
3. Notice that the User field is pre-populated.
4. Enter Password as the User specified. This field is mandatory.
5. Select the Quality Analyst and Originator you want to notify.
6. Use the palette to add Reviewers.
7. Add Comments, if any.
8. Select the Send notification as urgent check box to mark the notification sent out because of this action as "Urgent".
9. Click Approve.
10. Click Finish.

### To reject a PSR:

1. Open a PSR. (Ensure that it is in the Review or Released status).

2. Click the Reject button above the tabs. The Reject for Review dialog appears.
3. Enter Password to enter as the User specified. This field is mandatory.
4. Select the Quality Analyst and the Originator you want to notify.
5. Use the palette to add Reviewers.
6. Add Comments, if any.
7. Select the Send notification as urgent check box to mark the notification sent out as a result of this action as "Urgent".
8. Click the Reject button.
9. Click Finish.

## Closing a PSR

**To close a PSR (promote a PSR to the Complete status):**

- Close it manually (provided you have the appropriate privileges).
- Set a Rule on the Relationships tab of the PSR so that the status of the PSR is Closed on meeting the conditions of that rule.

## Actions menu in PSR

The Actions menu provides you with a list of actions that you can perform on the PSR such as:

- **Bookmark:** Saves the PSR as a Bookmark for future retrieval.
- **Subscribe:** Subscriptions notify you of changes on tables or of attributes on the objects.
- **Save As:** Creates and saves a copy of the current PSR in the same or a different subclass.
- **Delete:** Deletes the PSR
- **Send:** Sends the PSR to other Users who have the necessary Roles and Privileges. Option to send the notification as urgent available.
- **Sharing:** Allows Users to grant other users privilege access equivalent to his.
- **Copy URL to Clipboard:** Copies the URL of the object to the clipboard, so that you can paste it elsewhere.
- **Audit Status:** Audits the status of an object to check if the workflow can progress further.
- **Audit Release:** Audits if the object can be released with the existing workflow status.
- **View Workflows:** Allows you to view the workflow states of the PSR.
- **Print:** Prints the PSR
- **Export:** Exports the PSR to a delimited text file (CSV), a Microsoft Excel Notebook, or an XML file.

- **Create Quality Change Requests:** Allows you to create Quality Change Requests on the PSR.

## Audit Status of a PSR

Audits the status of a PSR, to check if the workflow can move to the next state. It is performed automatically when the workflow of the PSR has to autopromote to the next state.

### To audit the status of a PSR in Java Client:

1. Open a PSR you need to audit.
2. Click the Audit button at the top or right-click in the window; choose Audit Status from the menu that appears.
3. The Audit Results for Audit Status dialog box appears. Correct errors, if any.
4. Click OK.

### To audit the status of a PSR in Web Client:

1. Open a PSR you need to audit.
2. Click the Actions menu and choose Audit Status.
3. A message bar displays the message to correct errors if any.
4. Click Close.

## Audit Release of a PSR

An Audit Release is performed automatically when the PSR is promoted to the release state. The Audit Release validates if the settings of a PSR match Release status settings.

(For example: Entry Required fields, Status matching criteria)

You can release a PSR by using the Next Status button on the Workflow tab. If you set the AutoPromote property of the preceding Review status type to Yes, then you release the routable object (automatically when all the approvers have approved the change).

Before you release a PSR, you need to audit it and pass the audit release. The system will validate the following audit for each status level:

- For the Pending, Review, Released, and Complete status:

Required fields for the current status level. (Your Agile Administrator determines the required fields in the workflow property settings.)

- For the Review status:

Checks approval of all Approvers.

- For the Released status:

Checks all the current release audit rules.

For details on how to release a PSR, see the 'Routing Objects with Workflows' chapter in the *Getting*

*Started with Agile PLM guide.*

**To audit the PSR for release in Java Client:**

1. Open the PSR you want to audit for release.
2. Click the Audit Release button or right-click in the Agile Java Client window; from the menu that appears, choose Audit Release. The Audit Results for Audit Release dialog box appears.
3. Correct errors, if any and audit again.
4. Click OK to close the Audit Results dialog box.

**To audit the PSR for release in Web Client:**

1. Open the PSR you want to audit for release.
2. Choose Actions > Audit Release.
3. Correct errors, if any and audit again.
4. Click Close.

# Managing QCRs

### This chapter includes the following:

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- Approving/Rejecting Quality Change Requests..... 69
- Closing a QCR..... 70
- Actions Menu in a QCR ..... 70

This chapter includes the following topics:

- [Approving/Rejecting Quality Change Requests](#) on page 69
- [Closing a QCR](#) on page 70
- [Actions Menu in a QCR](#) on page 70
- [Change Order in a QCR](#) on page 71

## Approving/Rejecting Quality Change Requests

If the QCR specifies you as an Approver, then you have to verify the audit or corrective action for a specific item. For details, see the *Getting Started with Agile PLM* guide.

You need to hold necessary privileges and meet the following conditions to approve/reject a QCR.

- The QCR needs to be in review or released type status
- You need the necessary privilege to approve/reject it in that status
- You need to be on the QCRs list as an approver or observer

### To approve a QCR in the Web Client:

1. Open the QCR you want to approve.
2. Click the Approve button. The Approve wizard appears.
3. In the Password field, enter your password.
4. Select the check boxes to notify the Originator, Quality Analyst, and Reviewers.
5. You can also notify users or user groups that you have approved the QCR.
6. Click the Search palette and select the users you want to notify.
7. In the Comments field, enter approver comments. Comments are not mandatory. You need to set Comments for Rejection to Allow in the Java Client.

For details, see 'Workflow' the *Agile PLM Administrator* guide.

8. Click Approve.

You can reject QCRs if they are not appropriate. For example, if you are a Quality Manager, and feel the corrective action taken by your team is not appropriate, you can reject the action.

### **To reject a QCR in the Web Client:**

1. Open the QCR you want to reject.
2. Click the Reject button. The Reject wizard appears.
3. In the Password field, enter your password.
4. Select the check boxes to notify the Originator, Quality Analyst, and Reviewers.
5. Click the Search palette to select users you want to notify.
6. In the Comments field, enter Approver comments. Comments are not mandatory. You need to set Comments for Rejection to Allow in the Java Client.

For details, see 'Workflow' the *Agile PLM Administrator* guide.

7. Click the Reject button.

## **Closing a QCR**

### **To close a QCR (promote a QCR to the Complete status):**

- Close it manually (provided you have the appropriate privileges).
- Set a Rule on Relationships tab of the QCR so that the status of the QCR is Closed on meeting the conditions of that rule.

Typically, when you release a Change or an ECO related to a QCR, the Quality Administrator determines if you can resolve and close a QCR.

## **Actions Menu in a QCR**

The Actions Menu provides you with a list of actions that you can perform on the QCR such as:

- **Bookmark:** Saves the QCR as a Bookmark for future retrieval.
- **Subscribe:** Subscriptions notify you of changes on tables or of attributes on the objects.
- **Save As:** Creates and saves a copy of the current object in the same or different subclass.
- **Delete:** Deletes the QCR.
- **Copy URL to Clipboard:** Copies the URL of the object to the clipboard, so that you can paste it elsewhere.
- **Audit Status:** Audits the status of an object to check if the workflow can progress further.
- **Audit Release:** Audits if the object can be released with the existing workflow status.
- **Print:** Prints the QCR.
- **Export:** Exports the QCR to a delimited text file (CSV), Microsoft Excel Workbook or to an XML file.
- **Send:** Sends the QCR to other Users who have the necessary Roles and Privileges. Option to


send the notification as urgent available.

- **Sharing:** Allows Users to grant other users privilege access equivalent to his.
- **Create Change:** Allows you to create a Change directly from the QCR.
- **View Workflows:** Allows you to view the workflow states of a QCR.

## Change Order in a QCR


You can create a change directly from the QCR, which allows you to release a change order to fix the problem. The Change you create from the QCR appears in the Relationships tab of the QCR.

### To create a Change from a QCR in Java Client:

1. In the Cover Page of a QCR, right-click and select Create Change.
2. Select a Change object type from the Type list. You can select MCO, ECO, ECR, Deviation, or Stop Ship.
3. In the Number field, type a number or click the AutoNumber  button to generate a number.
4. The Add Affected Items to Change table lists all Affected Items of QCR and PSR. Select item(s) from the list of Affected Items and PSR Items. If an Item is already associated with a Change, it still appears in this list so that you can initiate multiple changes related to one Item. The list will only show unique items (if the same item shows up in the Affected Items and PSR Items, then the list will only display that item once).
5. Click OK.

Agile Java Client creates the Change and adds it to the Relationships tab of the QCR. The system copies the Items selected to the Affected Items tab of the Change (This allows you to separate the QCR into multiple Changes, each containing different Items).

### To create a Change from a QCR in Web Client:

1. Open the QCR and select Actions | Create Change menu option.
2. In the Create New dialog, select a Change object type from the sub-class list. You can select MCO, ECO, ECR, Deviation, or Stop Ship.
3. In the Number field, type a number or click the Autonumber  button to generate a number.
4. The Date Originated field is pre-populated.
5. Click the Search palette to add Versions.
6. Use the Search palette to add Affected Items. Select and double-click an object to move it to the Affected Items field.
7. Click Close.
8. Click Save.

Agile Web Client creates the Change and adds it to the Relationships tab of the QCR. The system copies the items selected to the Affected Items tab of the Change (This allows you to separate the QCR into multiple Changes, each containing different Items).



# Deleting Agile Objects

Java Client and Web Client support “soft” and “hard” deletes for many Agile object classes. When you soft-delete an object in the database, it is not permanently deleted. A soft-deleted object is marked “Deleted” in the database, and its object number or name is reserved. You cannot create another object with the same type and number or name as a soft-deleted object.

When you run a search, soft-deleted objects do not appear in the search results table. To locate soft-deleted objects, you must run the predefined deleted object searches in the Recycle Bin Searches folder.

---

**Note** You have access to the Recycle Bin Searches folder if Recycle Bin Searches is included in the Searches field of your user profile. If you have the appropriate privileges, you can edit your user profile and add Recycle Bin Searches to the list of searches in the Searches field. If you do not have the appropriate privileges to modify the Searches field in your user profile, ask the Agile administrator to modify your user profile.

---

A hard-deleted object is permanently removed from the database.

**Caution** You *cannot* undelete a hard-deleted object.

In order to soft-delete, hard-delete or undelete an Agile object:

- You must have the appropriate Delete or Undelete privileges for that object.
- All relationships and subscriptions must be removed.
- The object must meet any additional conditions that determine whether it can be deleted or undeleted.

In general, if deleting or undeleting an object would cause the compromise of data integrity, the delete or undelete action is disabled.

## Notes about Deleting PSR or QCR Objects

Before you can delete a Product Service Request (PSR) or Quality Change Request (QCR) object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- The PSR or QCR is at the Pending status type or the Unassigned status.
- You have Discovery and Read privileges for any items on the Affected Items table; otherwise, you cannot delete the PSR or QCR.

---

**Note** To delete a PSR or QCR that has already been released, you must first unrelease it. You need the appropriate privileges to unrelease a PSR or QCR by using the Workflow tab to switch it to a different status.

---

You *cannot* delete a PSR if:

- It appears on a QCR's Relationships tab.
- It is currently part of a corrective action process. Remove the PSR from the QCR and then delete the PSR.
- It appears in the Related PSR tab of another PSR.
- It is currently part of a larger problem. Remove this PSR from the parent PSR and then delete it.
- It appears on the Related PSR tab.
- It is being used to aggregate multiple problems. Remove the related PSRs and then delete it.

You *cannot* delete a QCR if:

- It has any PSRs on the Relationships tab.
- If the corrective action process contains Problem Reports. Remove the PSR from the QCR and then delete the QCR.
- It has any Changes on its Relationships tab.
- If the corrective action process is already routed through engineering changes. Remove the Changes from the QCR and then delete the QCR.


This section contains the following topics:

- [Soft-Deleting an Object](#) on page 74
- [Undeleting an Object](#) on page 75
- [Hard-Deleting an Object](#) on page 75

## Soft-Deleting an Object

When an object is soft-deleted, it is no longer available for use. However, until it is hard-deleted, its number or name is reserved in the Agile database and cannot be reused.

### To soft-delete an object in Java Client:

1. Select and open the object you want to delete.
2. Click the Delete button , and respond Yes to the confirmation prompt.

The object is soft-deleted.

### To soft-delete an object in Web Client:

1. Select and open the object you want to delete.

2. Choose Actions > Delete, and respond OK to the confirmation prompt.


The object is soft-deleted.

See also: Deleting Agile Objects, [Undeleting an Object](#) on page 75, and [Hard-Deleting an Object](#) on page 75.

## Undeleting an Object

If you have the appropriate privileges, you can undelete soft-deleted objects.


### To undelete an object in Java Client:

1. Run the appropriate Deleted <*objects*> search from the Recycle Bin Searches folder.
2. Open the deleted object you want to restore.
3. Click the Undelete button .

### To undelete an object in Web Client:

1. Run the appropriate Deleted <*objects*> search from the Recycle Bin Searches folder.
2. Open the deleted object you want to restore.
3. Choose Actions > Undelete.

---

**Note** You can click the Navigator button in the search results table to display the search result object links in the left pane  NAVIGATOR drawer.


---

See also: Deleting Agile Objects, [Soft-Deleting an Object](#) on page 74, and [Hard-Deleting an Object](#) on page 75.

## Hard-Deleting an Object

Soft-deleted objects still exist in the database. To remove an object permanently, you must hard-delete it. While an object is still only soft-deleted, you can undelete it. Run the appropriate Deleted *object* search from the Recycle Bin Searches folder.

### To hard-delete a soft-deleted object (if you have the appropriate privileges) in Java Client:


1. Run the appropriate Deleted <*objects*> search from the Recycle Bin Searches folder.
2. Open the object.
3. Click the Delete Object button , and respond Yes to the confirmation prompt.

### To hard-delete a soft-deleted object (if you have the appropriate privileges) in Web Client:

1. Run the appropriate Deleted <*objects*> search from the Recycle Bin Searches folder.
2. Select the one or more object rows in the search results table.
3. Click the Delete button.

4. In response to the warning prompt, choose Continue, then click Finish.
5. Or, you can hard-delete one object at a time:
  - Open the object.
  - Choose Actions > Delete, and respond OK to the confirmation prompt.

---

**Note** You can click the Navigator button in the search results table to display the search results object links in the left pane  NAVIGATOR drawer.

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See also: Deleting Agile Objects, [Undeleting an Object](#) on page 75, and [Soft-Deleting an Object](#) on page 74.