



# **Agile Product Lifecycle Management**

Product Quality Management User Guide

v9.2.2.7

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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>

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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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## Introducing Product Quality Management

This chapter includes the following:

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- What Is Agile Product Quality Management? ..... 1
- Product Service Requests (PSRs)..... 2
- Quality Change Requests (QCRs)..... 3
- Quality Tracking Roles..... 4

### What Is Agile Product Quality Management?

Agile Product Quality Management (PQM) comprises a comprehensive set of tools that allows corporations to track and manage data about product quality across the enterprise. This includes customer complaints, product and manufacturing defects, field failures, and enhancement and corrective and preventive actions requests. Agile PQM closes the support loop by unifying the company's customer service, field sales, manufacturing, and engineering organizations, and by tightly linking the company to its customers and partners.

As competition increases, customers are demanding quality product on time and at a lower cost while the product lifecycles shorten. The benefits that Agile PQM features offer to improve your organization's operations and save time and money are:

- Integration with external enterprise Customer Relationship Management (CRM) systems — the ability to import customer complaints, manufacturing issues, and additional quality-related information from other enterprise applications streamlines the quality tracking process and offers a central repository for tracking product quality data.
- Improved product quality — tracking defects, finding trends, and determining the root causes of defects in a timely manner are the keys to effective defect reduction and improved product quality.
- Improved customer satisfaction — the ability to track problem reports and customer complaints lets you respond to customers and resolve problems quickly.
- Lower production, repair costs, and warranty costs — tracking and correcting defects can help reduce the scrap, cycle time, and costs associated with rework and repair.
- New features enable compliance with ISO-9000, FDA, and other regulations.

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**Note** Your organization's license must include use of the quality tracking features to access the options described in this manual.

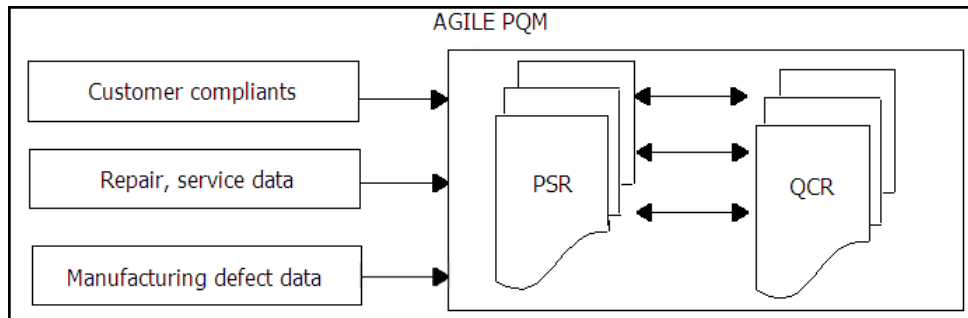
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The Agile PQM solution is divided into **Product Service Requests (PSRs)** and **Quality Change Requests (QCRs)**. PSRs are used to manage problem reports and non-conformance reports. QCRs are used to manage and associate the problem reports with audits and corrective and preventive actions (CAPAs).

**Customers** and **Suppliers** are also involved in the Agile PQM solution. Both customers and suppliers

can submit PSRs.

The following figure illustrates how quality data flows from different sources to PSRs and QCRs.



## Product Service Requests (PSRs)

You can use a Product Service Request (PSR) to report quality incidents or to aggregate a number of other PSRs. The Product Service Request class includes **Problem Reports (PRs)** and **Non-Conformance Reports (NCRs)**. You use PRs to report any generic quality incidents and NCRs to report material deviations from the specifications or any other specific quality issues.

### Problem Reports (PRs)

A **Problem Report** contains a basic description of a problem, issue, or incident that occurred, from the customer's perspective. A customer, field service representative, or supplier may submit a problem report.

A problem reported by the customer need not necessarily be the actual cause. For example, a problem report might state that the CD drive does not stay locked into the computer case, and it might state that the cause of this problem is a malfunctioning lock. The actual cause may not be the lock, but this will not be known until your organization investigates the problem.

**Problem Reports** can be routed for investigation through a workflow. The investigating team determines the root cause of the problem. The user with the Quality Analyst role oversees the processing of problem reports.

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

### Non-Conformance Reports (NCRs)

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. **Non-Conformance Reports** can also be routed for investigation.

NCRs are typically used in incoming lot inspections or in testing processes, where the Quality Control department samples a subset of materials to identify deviations from the specifications.

## Quality Change Requests (QCRs)

The **Quality Change Request (QCR)** class is used to create and manage **Audits** and **Corrective and Preventive Actions (CAPAs)**. An audit is the proactive process of verifying compliance with quality requirements. The **CAPA** is a formal process of addressing any generic quality problems and analyzing the root causes so you can implement corrective and preventive actions.

The QCR allows 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:

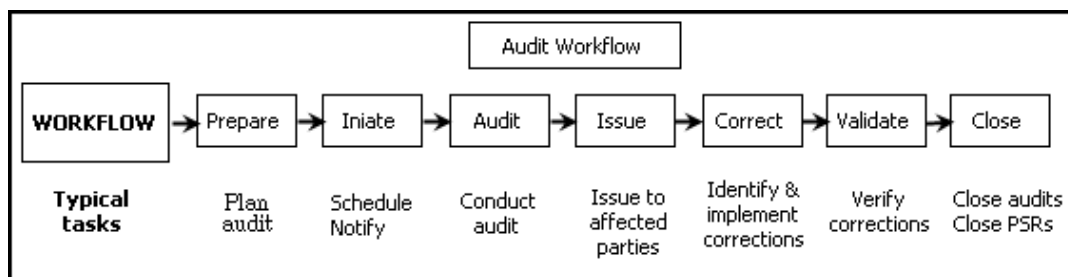
- Create and manage quality records that aggregate problems related to products, documents, suppliers, and customers.
- Provide a means for driving quality-related changes by creating changes such as ECOs, MCOs, ECRs, stop ships, and deviations.
- Route change requests for review and approval, thereby 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).
- Provide an audit trail between problems, corrective and preventive actions, and engineering changes that enables internal and external compliance processes.

For example, you receive items from your supplier, and when checking the quality of the items, you identify a defective item. To take corrective action, you create a QCR for the defective item and route the QCR for review and approval. After the quality change request is approved, you can route the item through the change to make sure that the defect is rectified and changed to new revision of the item.

## Audit

An Audit is a pro-active process of verifying compliance with quality requirements.

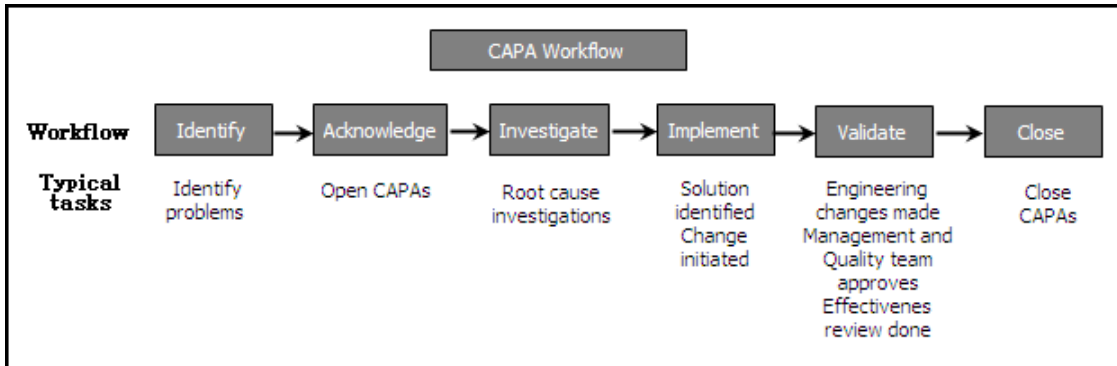
The Default Audits workflow has different statuses from other default workflows. The following diagram shows the Default Audits workflow statuses and typical tasks related to audits:



## CAPA

You can use corrective and preventive actions (CAPAs) to address any 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 is controlled by a workflow.

The Default CAPA workflow has different statuses from other default workflows. The following diagram shows the Default CAPA workflow and typical tasks related to audits:



## Quality Tracking Roles

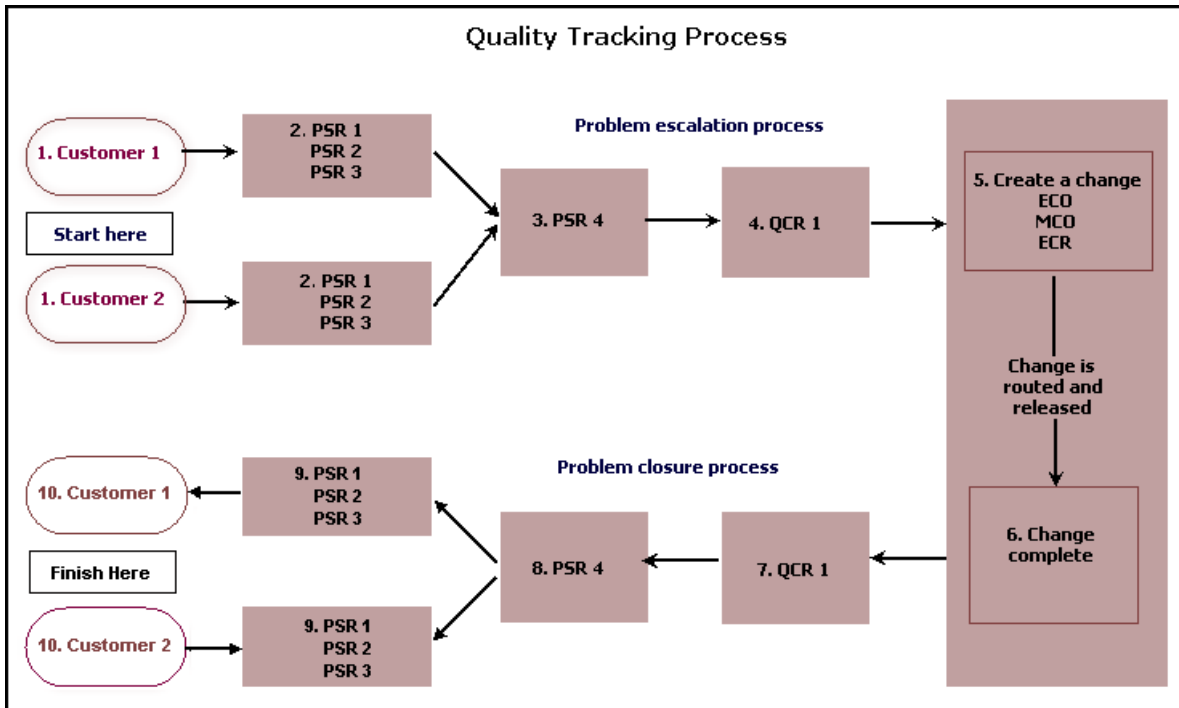
Product Quality Management provides the following roles:

- **Quality Analyst** — Allows users to submit Product Service Request and manage their resolution.
- **Quality Administrator** — Allows users to manage Quality Change Requests.

Your Agile Administrator may have set up the roles differently on your system. For details about Agile PLM roles, see the *Agile PLM Administrator Guide*.

## Quality Tracking Process

The Product Quality Management solution is flexible. You can adapt it to fit your business processes. The following diagram illustrates one example of a quality incident process. Following the diagram is a description of each numbered step.



The steps outlined in the preceding figure are explained below:

1. Two customers - **Customer 1** and **Customer 2** —report quality incidents.
2. The support representative creates problem service requests (PSRs) for the reported incidents: PSR-1, PSR-2, PSR-3 for **Customer 1** and PSR-1, PSR-2, PSR-3 for **Customer 2**. These problem reports are submitted to the Quality Analyst.
3. The Quality Analyst reviews all the PSRs from different customers. All the PSR incidents from different customers appear to be related, so the Quality Analyst aggregates all these related PSRs into one PSR and creates PSR-4. Then PSR-4 is routed through the workflow for further processing.
4. The Quality Administrator creates a quality change request, QCR-1. The QCR includes a list of the items that it affects. The QCR is routed, and engineering team determines that the request is valid and merits a change to either an ECO, MCO, ECR, stop ship or deviation depending on the problem.
5. A change is created to address the problem. The Change Analyst routes the change through the workflow.
6. The change is eventually implemented, fixing the original problem. The Change Analyst sends a notification to the Quality Administrator, who then decides whether the change did indeed address the problem documented in the QCR.

7. The quality administrator takes action to close the QCR.
8. PSR-4 is automatically closed through the relationships specified on the **Relationships** tab.
9. All the child PSRs aggregated to PSR-4 are automatically closed based on the specified relationships.
10. The Quality Analyst sends a notification of the problem resolution to **Customer 1** and **Customer 2**.

The process outlined above is just an example. The flexibility of Agile Product Quality Management also allows routable objects to be created without any associated problem reports, and QCRs to be created without problem reports. Additionally, multiple incidents may lead to one QCR, but a single incident can lead to only one QCR. A QCR may lead to multiple changes (such as ECOs or SCOs), or multiple QCRs may lead to one change.

## Quality-Related SmartRules

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

- **Many Items per PSR**
- **Many QCRs per PSR**
- **PSR contains Items and Related PSRs**
- **Release QCR with unresolved Items**

For a complete description of these and other SmartRules, see the *Agile PLM Administrator Guide*.

The **PSR Contains Items and Related PSRs** SmartRule controls the behavior of the **Affected Items** tab and the **Related PSR** tab of PSRs. If that SmartRule is set to *Allow*, PSRs can have both affected items and related PSRs. Otherwise, the **Affected Items** tab and the **Related PSR** tab are mutually exclusive. In other words, if the **Affected Items** tab lists items, then the **Related PSR** tab is unavailable; and if the **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.

## Quality Searches

To find specific PSRs and QCRs, you can perform a quick search by selecting the required search from **Quality Searches** folder. For example, if you are a Quality Administrator and you want 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
- Closed QCRs
- Released QCRs

- Unassigned Submitted QCRs
- Open QCRs

---

**Note** You will see **Quality Searches** folder only if your Agile PLM Administrator has specified the searches in your profile.

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## Quality Reports

Agile PLM provides several standard reports that help you analyze data in Agile Product Quality Management. In the navigation pane of Agile Web Client, click **Analytics and Reports** and select **Quality Reports** folder. It lists the following reports:

Report name	Description
<b>Failure Trend</b>	Identifies trends in failure modes 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 time period, product service requests must have a value specified in the <b>Affected Items Quantity Affected</b> field.
<b>Quality Activity</b>	Lists all the quality incidents (product service requests and quality change requests) that were processed during a specified period.
<b>Quality Backlog</b>	Counts the quality incidents (product service requests and quality change requests) that were at a specified status but have not moved to another specified status during a specified time period.
<b>Quality Cycle Time</b>	Calculates the time it took the specified product service requests and quality change requests (PSRs and QCRs) to move from one status to another during the specified period.  The report lists the requests and shows the average time each PSR or QCR spent between two statuses per time period. 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.
<b>Quality Metrics</b>	Shows quality incidents (product service requests and quality change requests) that were moved to a specified status during a specified period.

Each of the Quality reports has a Report Wizard. Step through the wizard, and click **Finish** on the final page to display the report.

## Running a Quality Report

### To run a Quality Report:

1. Select the report in the Quality Reports folder. The report's page appears.
2. Click the **Execute** button. The Select Layout and Configuration page appears.
3. Select the layout you want from the list, or use the Layout manager to create a new layout.
4. Click **Next**. The Quality report (except the **Quality Activity Reports**) lets you search for Product Service Requests to use in the report

5. Click **Saved Search** if you want to use a search from the list of available searches.
6. Click **Advanced Search** to create a new query. Select All Product Service Requests to use all PSRs
7. Click **Next**.
8. Specify other settings for the report. Examples of other Quality report settings include:
  - The time covered.
  - The time units used in the report.
  - The workflow used in the report.
  - The way to group data to evaluate trends.
9. Click **Finish** to display the report.

Once the report appears, you can print it, export its contents to a delimited text file(CSV) or a Microsoft Excel workbook, or save it to the Historical Report tab.

In Agile PLM 9.2.2.4, only Quality Activity Reports supports the BI Publisher technology.

Ensure to enable BI Publisher option to Yes in the Java Client for reports to generate multiple output formats.

#### **To run a Quality Report using a BI Publisher:**

1. Select the report in **Quality Reports** folder. The report's page appears.
2. Click **Execute** button. The Select Layout and Configuration page appears.
3. Select the layout you want from the list, or use Layout Manager to create a new layout.
4. Check **Use BI Publisher** check box to generate reports in multiple output formats.

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**Note** Enable **Automatic Prompting for File Downloads** in the custom settings to save the generated output formats of a report on to the local machine.

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5. Check **Use BI Publisher** check box. An additional field with a list of the output formats appears.
6. Select an output format. You can choose from a list of formats like WORD, EXCEL, PDF and HTML.
7. Check **Save the Report** check box to save report.

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**Note** You can also generate Reports using the existing layout.

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8. Click **Next**. The Quality reports (except the **Quality Activity Report**) lets you search for Product Service Requests to use in the report.
9. Click **Saved Search** if you want to use a search from the list of available searches. Click **Advanced Search** to create a new query or select **All Product Service Requests** to use all PSRs.
10. Click **Next**.
11. Specify other settings for the report. Examples of other Quality report settings include:
  - The time covered: The period covered between the From and To time. Reports will include data received within this period.
  - The time units used in the report: You can choose from a list of Time Units, Such as Year, Quarter, Month, Week and Day.

- The workflow used in the report: The workflow used for a PSR or QCR.
- The way to group data to evaluate trends: You can choose from a list of attributes provided. Report gives a summary data against the attribute, so that the user gets an overview to trends evaluation.


12. Click **Finish** to display the report.

Reports generated can then be printed, or the contents can be exported to a delimited text file (CSV), or a Microsoft Excel workbook, or saved to the Historical Report tab. Only reports generated using **BI Publisher** can be viewed in WORD, PDF, EXCEL or HTML.

## Quality Tracking Tabs and Fields for Other Objects

Quality information on certain tabs and fields is linked with information about objects such as items, customers and suppliers so that users in your organization can 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 a customer. This helps 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.

The Has Quality icon  indicates the presence of either an open PSR or QCR on an Item. This is visible in the following:

- Advanced Search Results based on Object type Item including all fields in search criteria field names like Part.Title Block, P2, Part.Pending Changes, Part.Manufacturers etc.
- Change AI tab including ECO, ECR, MCO, SCO, Deviation, and Stopships
- Item.BOM table which has a pending PSR or QCR.



# Working with Product Service Requests

This chapter includes the following:



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## Creating PSRs

You create a PSR object in the same way as you create other Agile PLM objects. You can also use the **New Object** button or the **Save As** feature. You must have the necessary privileges to create a PSR object.

**To create a PSR in Java Client:**

1. On the main toolbar, click **New Object** button . The New dialog box appears.
2. Select NCR or Problem Report from the **Type** list.
3. In the **Number** field, accept the default number. You can also type a number or click the **AutoNumber** button  to automatically enter the next number.
4. Click **OK**. The **Cover Page** appears.
5. Enter the required information on the **Cover Page** tab.
6. Click **Save**. For information about the fields on this tab, see [Cover Page Tab of a PSR](#) on page 17.

Agile Java Client creates the PSR and displays the PSR with the **Cover Page** tab on top. If a workflow is not assigned to a PSR then the created PSR will have the Unassigned status. To assign a workflow, select a workflow from the **Workflow** list.

You can also add multiple items to a PSR (like parts, documents, assemblies). For more information about adding items, see [Adding Affected Items](#) on page 22.

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**Note** Depending on your system's SmartRule settings, the **Related PSR** tab may be disabled after you add items to the **Affected Items** tab.

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

1. On the main toolbar, go to **Create > Product Service Request > Problem Reports** or **Non-Conformance Reports**.

2. When the PSR Reports Creation wizard opens, select a subclass from the list.
3. In the **Number** field, accept the default number. You can also type a number or click the **AutoNumber** button  to generate automatically enter the next number.
4. Click **Next**. The Enter Cover Page Information page appears.
5. Enter the required information. For information about the fields on this tab, see [Cover Page Tab of a PSR](#) on page 17.
6. Click **Finish**.

Agile Web Client creates the PSR and displays it with the **Cover Page** tab on top. If a workflow is not assigned to the PSR, the status is Unassigned. To assign a workflow, click the **Edit** button on the Cover Page and select a workflow from the **Workflow** list.

You can also add multiple items to a PSR (like parts, documents, assemblies). For more information about adding items, see [Adding Affected Items](#) on page 22.

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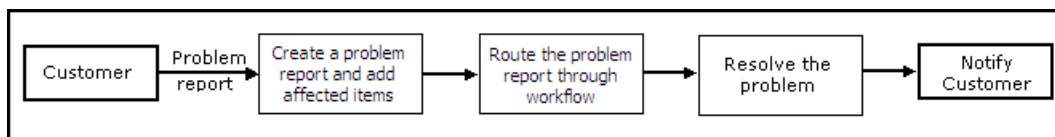
**Note** Depending on your system's SmartRule settings, the **Related PSR** tab may be disabled after you add items to the **Affected Items** tab.

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## Creating a PSR

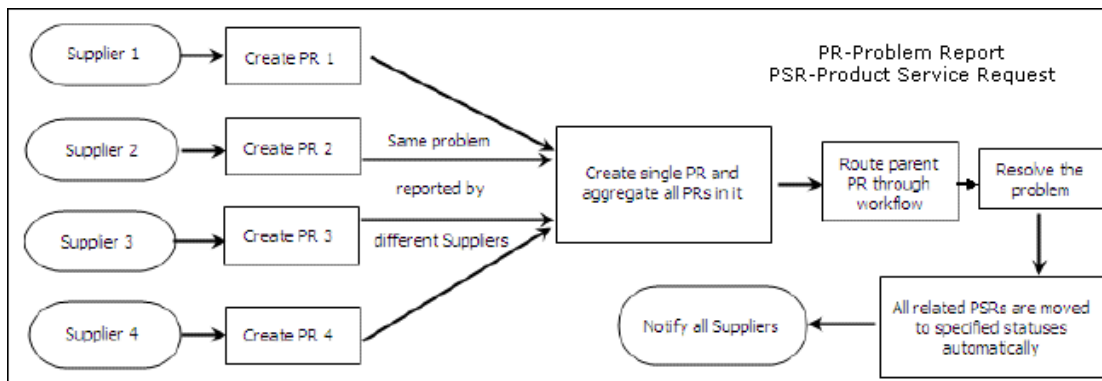
You can create a Product Service Request (PSR) in various ways, depending on the quality of the incidents. Here are two examples:

- **Creating a PSR to report a single quality incident** — For example, if you are a Quality Analyst working at a computer manufacturing division. A customer calls to report a problem about a CD drive not opening, to insert and remove CDs. You create a quality incident for this problem specific to CD drive item ( its related parts and documents) and want the QA department to quickly look into this incident to see if it is in fact a defect or merely an user error.



- **Creating a PSR to aggregate multiple PSRs** — For example, if you are a Quality Assurance Engineer for a certain product. Recently, you have noticed several incoming lots and shipments from your suppliers that do not conform to the material specifications. You decide to track down all these incidents and create one single PSR to aggregate all the supplier's incidents.


The following diagram illustrates the flow:



## Creating a PSR from Items

You can create a PSR from items.


### To create a PSR from an item in Java Client:

1. Open the item from which you want to create a PSR.
2. Right-click in the item window, and choose **Create Product Service Request** from the shortcut menu. The Create Product Service Request dialog box appears.
3. Select NCR or Problem Report from the **Type** list.
4. In the **Number** field, accept the default number. You can also type a number or click the **AutoNumber** button  to generate the next number.
5. Click **OK**. Enter the required information on the **Cover Page** tab.
6. Click **Save**.

For information about the fields on this tab, see [Cover Page Tab of a PSR](#) on page 17.

Agile Java Client creates the PSR and displays it with the **Cover Page** tab on top. 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 for which you want to create a PSR.
2. On the item page, choose **Actions > Create Product Service Request**. The Product Service Request Creation Wizard appears.
3. Select a subclass (Problem Report or NCR) from the list.
4. In the **Number** field, accept the default number. You can also type a number or click the **AutoNumber** button  to generate the next number.
5. Click **Next**. The Enter Cover Page Information page appears.

Enter the required information. For information about the fields on this tab, see [Cover Page Tab of a PSR](#) on page 17. You can assign a workflow to route the PSR through the workflow statuses.

6. If you need to add additional items, click **Next** or click **Finish**.

Agile Web Client creates the 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

You might have created a number of PSRs to deal with multiple problems. You might discover that if a particular problem is solved all the related problems for which you have created PSRs would also be resolved. You can aggregate other related PSRs that have already been created. The PSR you create to solve the related PSRs is considered the Parent PSR, and all the added PSRs on the **Related PSR** tab are considered child PSRs.

### 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.
2. Choose **File > Save As**, or right-click and choose **Save As**. The Save As dialog box appears.
3. Select NCR or Problem Report from the **Type** list.
4. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button to generate the next number.
5. Click **OK**.

Agile Java Client creates the PSR and displays the PSR with the **Cover Page** tab on top.

On the **Affected Items** tab do **NOT** add any items.

6. On the Related PSR tab add related PSRs.

Once you add related PSRs to this Parent PSR, the **Cover Page** tab of the child PSR displays the Aggregate PSR number with this Parent PSR number.

7. Click to select the related PSR.
8. Click **Edit Product Service Request**.
9. The **Edit Product Request** dialog box appears. Specify the PSR Event and PSR Result status.
10. Click **OK**.

---

**Note** Depending on your system's SmartRule settings, the **Related PSR** tab may be disabled after you add items to the **Affected Items** tab.

---

Field	Completed	Contains...
<b>PSR Event</b>	Manually	<p>The status of the Parent PSR that triggers an automated workflow event.</p> <p>Select an available status from the drop-down list. You can specify the status only 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> You can specify the <b>PSR Event</b> status only when both objects (parent and child) are assigned a workflow on the <b>Cover Page</b> tab.</p>
<b>PSR 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 <b>PSR Event</b> field, then the status of the related PSR is automatically moved to the specified result status in this field.</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 Cover Page tab.</p>

### To create a PSR to aggregate multiple PSRs in Web Server:

Open a PSR you want to use as the basis for a new PSR. Choose **Actions > Save As**. The Save As page appears.

1. Select NCR or Problem Report from the Type list.
2. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button to generate the next number.  
On the **Add Affected Items** page, do **NOT** add any items.
3. Click **Next**.
4. On the **Add Related Product Service Requests** page, click **Add** to add all the related PSRs.
5. 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 Aggregate PSR Number field displays the Parent PSR number.
6. Click **Finish**.

The Agile Web Client creates the PSR and displays it with the **Cover Page** tab on top.

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 automatically fills in the Aggregate PSR Number field

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**Note** Depending on your system's SmartRule settings, the **Affected Items** tab may be disabled after you add related PSRs.

---


## Creating a PSR Using Save As

You can use **Save As** to create a PSR. **Save As** copies data from a field in the existing object to the same field in the new object. If a field or list value in the existing object is not available in the new object, then that field or list value is not copied to the new object. 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.

### 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 choose **Save As**. The Save As dialog box appears.
3. Select NCR or Problem Report from the **Type** list.
4. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
5. Click **OK**.  
Agile Java Client creates the PSR and displays the PSR with the **Cover Page** tab on top.
6. Make appropriate modifications to the tabs, and click **Save**.

### 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 page appears.
3. Select NCR or Problem Report from the **Type** list.
4. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
5. Click **Save**. The new object opens.
6. Make appropriate modifications to the tabs, and click **Save**.

---

**Note** In general, you should not use **Save As** to create an object in a different class or subclass from the original object. The different classes or subclasses may not have the same tabs or defined fields, and you may lose access to some data in the newly created object.

---

The following fields are copied to the new PSR:

Fields copied from old object	Automatically generated fields
Category, PSR Type, Problem Description, Severity, Product Line(s)	Originator
Page Two and Page Three flex fields.	Date Originated
All item information is copied from the <b>Affected Items</b> tab.	<b>Status</b> field is set to Unassigned by default.
All attachments are copied from the <b>Attachments</b> tab.	

Fields copied from old object	Automatically generated fields
History tab reflects the source and target objects.	

If the Agile PLM Administrator has set the appropriate preferences, fields in the optional **Page Two** and **Page Three** sections are copied to the new PSR. For information about the behavior of Page Two and Page Three fields in your Agile PLM system, see your Agile PLM Administrator.

## Cover Page Tab of a PSR


The following table provides information about working with the tabs for product service requests and describes the fields on the PSR **Cover Page** tab.

Field	Completed	Contains...
<b>PSR Number</b>	Automatically, when created.	The number assigned to the PSR when you create it.  For a problem report, the number is prefixed with PR.  For non-conformance report, the number is prefixed with NCR.
<b>PSR Type</b>	Automatically, when created.	The type (subclass) selected when you create the PSR.
<b>Category</b>	Manually	The list of categories defined by the Agile PLM Administrator, for example:  Customer Complaint Audit - External Preventive Action
<b>Description</b>	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	The list of dispositions defined by the Agile PLM administrator.  The <b>Disposition</b> field displays a code that represents the way in which a PSR is being resolved. Examples of dispositions are Replace Component and Rework to Spec.
<b>Expected Resolution Date</b>	Manually	Expected problem resolution date.

<b>Field</b>	<b>Completed</b>	<b>Contains...</b>
<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.	The default quality analyst. If the workflow is defined to notify the default quality analyst, the department or user in this field receives notifications about the PSR. If this field is left blank, then the notifications are sent to every quality analyst on the list. If the notification definition in the workflow is blank, no notifications are sent.
<b>Workflow</b>	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 type status. Selecting the blank field in the <b>Workflow</b> switches the PSR to the Unassigned status.  If no workflow is assigned, and you move the PSR to the next status from the Unassigned status, you are prompted to select a workflow.	The name of the workflow being used to move this PSR through the quality tracking process.
<b>Status</b>	Automatically, when created; updated as the <i>PSR</i> moves through the assigned workflow.	Workflow status. If no workflow has been selected, this field is Unassigned.
<b>Originator</b>	Automatically, when created.	The default creator of the PSR. The list of other problem report originators.
<b>Date Originated</b>	Usually automatically, when created.	The date the PSR was created.
<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 first 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 workflow.

Field	Completed	Contains...
<b>Aggregate PSR Number</b>	<p>Automatically filled in when PSR(s) are added to the <b>Related PSR</b> tab.</p> <p>For example, if PSR005 lists PSR003 and PSR004 on the <b>Related PSR</b> tab, then on the <b>Cover Page</b> tab of PSR003 and PSR004, PSR005, the parent, will appear in the <b>Aggregate PSR Number</b> field.</p>	<p>This number is automatically filled in with the parent PSR number.</p> <p>For example: For a single problem, many quality incidents from your suppliers are already created. You decide to track down all these incidents and create one single PSR (parent PSR) to aggregate all supplier's incidents.</p> <p>You can also set the result status of all related PSRs to change automatically when the aggregate PSR reaches a specific status.</p>
<b>Product Line(s)</b>	Manually	The product lines this PSR affects.

## Affected Items Tab of a PSR

The **Affected Items** tab lists all the items that are affected by the current PSR. A single PSR can affect multiple items (parts, documents). An  icon on the **Affected Items** tab indicates that it contains affected items.

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**Note** You can add affected items only if the PSR has not reached the Released status of the workflow.

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You can edit any information that has changed since the PSR was created. You might also need to add additional items (like parts, documents, assemblies) that need resolution. The same applies to QCRs also.

The Affected Items table has the following columns by default.

Field	Completed	Contains...
<b>Item Number</b>	Automatically, when created.	Number of the affected item.
<b>Item Description</b>	Automatically, when created.	Description of the item.
<b>Rev Found</b>	Manually	<p>The revision of the affected item in which the problem is found. For example, if the item has undergone five revisions, and this defect is identified in revision B, then the <b>Rev Found</b> field displays B.</p> <p>In Web Client, when you select an item to add, all revisions of the item appear in the drop-down list with the latest released revision shown by default. You can select to report on this current revision or an older revision of the item (for incidents associated with parts that are no longer used in latest models) or pending revisions of the item.</p> <p><b>Note:</b> You can add multiple copies of an item at the same revision to the Affected Items tab.</p>

Field	Completed	Contains...
<b>Affected Site</b>	Automatically, when created.	The site at which the affected items are having problems.
<b>Failure Mode</b>	Manually	Displays the way in which a product failed or did not meet customer requirements. You select the failure mode from a list defined by the Agile Administrator. Lists of failure modes can be defined for each subclass of an item. For example, a failure mode for a battery might be No Charge, and a failure mode for a power strip might be Blown Fuse.
<b>Quantity Affected</b>	Manually	The number of items that were affected by the quality incident.
<b>Rev Fixed</b>	Automatically, when problem is fixed in the revision. It can also be changed manually.	The revision of the item in which the problem is fixed. This field can be automatically populated when a related ECO is released, or it can be manually updated.
<b>Latest Change</b>	Automatically, when problem is fixed in the revision.	The change number of the most recently released change, which is related to this PSRs affected items.

## NCR Affected Items Attributes

The attributes and operations of NCRs are similar to those of problem reports except for a few fields on the **Affected Items** tab, which are explained below.

The following table lists fields that are used in addition to the fields used in problem reports. These fields provide additional information about deviations in one or more products. This indicates a part of the process by which the quality assurance team examines incoming materials from a supplier shipment.


Field	Completed	Contains...
<b>Conformance Specification</b>	Manually	Information about what the material should be, according to the engineering specifications.
<b>Serial/Lot Number</b>	Manually	Serial number or lot number of the items.  If there are problems, enter the serial or lot number of the batch that was defective (this is similar to the unique identifier for the batch of goods).

Field	Completed	Contains...
<b>Total Quantity Suspect</b>	Manually	Total quantity of items suspected of problems.  If the shipment had problems based on the sample inspection, enter the total number of units that were suspected of having problems.  For example, you receive a lot of 500 units and you inspect 20 units and find that 5 are defective: <ul style="list-style-type: none"> <li>• 500 total suspect</li> <li>• 20 checked</li> <li>• 5 affected</li> </ul>
<b>Quantity Checked</b>	Manually	The number of items that were checked.
<b>Quantity Affected</b>	Manually	The actual number of items that had problems.
<b>Containment Actions</b>	Manually	Containment actions taken to dispose of the material.  For example, scrap all materials, send back to supplier, and mark the bad batches.
<b>RMA Number</b>	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.
<b>Conforming Material Date</b>	Manually	The date when the supplier expects to be able to send materials that conform to the specifications.

## Editing Affected Items

If you have the appropriate privileges, you can edit or remove items on the **Affected Items** tab.

### To edit an affected item in Java Client:

1. Open a PSR, and click the **Affected Items** tab.
2. Select the item row you want to edit, and click  **Edit Affected Items**. The **Edit Affected Items** dialog box appears.
3. In the editable fields, enter text or use the lists to select values.
4. When you are finished, click **OK**.

For more information about the fields on this tab, see [Affected Items Tab of a PSR](#) on page 19.

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


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

- A quality incident is submitted, and a known fix has already been released or implemented. In this case, 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 an affected item in Web Client:

1. Open a PSR, and click the **Affected Items** tab.
2. Select the item row you want to edit, and click the **Edit**  button.
3. In the editable fields, enter text or use the lists to select values.
4. When you are finished editing, click **Save**.

For more information about the fields on this tab, see [Affected Items Tab of a PSR](#) on page 19.

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**Note** If you manually update the **Rev Fixed** field, then the **Latest Change** field is automatically populated with the ECO related to that revision change. The **Rev Fixed** 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:

- A quality incident is submitted, and a known fix has already been released or implemented. In this case, 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.


## Adding Affected Items

You can add items to the **Affected Items** tab of a PSR.

#### To add affected items to a PSR in Java Client:

1. Open the PSR, and click the **Affected Items** tab.
2. Click the **Add** drop-down menu button and choose one of the following options:
  -  **Create** – Select a type from the **Type** list. If appropriate, enter an object number and a description. Click **OK**.
  -  **Search** – Search for one or more existing items.



In the Add Affected Item dialog box, select a search method. 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 or a Parametric Search, select a Bookmark or Recently Visited Item (Shortcuts). If you want to select different revisions of items or edit other fields, make sure the **Edit Rows After Adding** box is checked. In the search results, select the items and click **OK**. All the items in the Selected Affected Items list are added to the Affected Items table.

-  **Type-in Known Number(s)** – Enter one or more numbers on separate rows, and click **Add**. If you click the **Add** button once without selecting an option from the list, the **Type-in Known Numbers** dialog box appears.


#### To add affected items to a PSR in Web Client:

1. Open the PSR, and click the **Affected Items** tab.

2. Click the **Add** menu button and choose one of the following options:

-  **Create New** – Select a type from the **Type** list. If appropriate, enter an object number and a description. Click **OK**.
-  **Search** – Search for one or more existing items.

In the Add Affected Item dialog box, select a search method. 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 or a Parametric Search, select a Bookmark or Recently Visited Item (Shortcuts). If you want to select different revisions of items or edit other fields, make sure the **Edit Rows After Adding** box is checked. In the search results, select the items and click **OK**. All the items in the Selected Affected Items list are added to the Affected Items table.

-  **Type-in Known Number(s)** – enter one or more numbers on separate rows, and click **Add**. If you click the **Add** button once without selecting an option from the list, the **Type-in Known Numbers** dialog box appears.


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**Note** An Agile PLM SmartRule named **Many Items per PSR** 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 Affected Items

### To remove affected items in Java Client:

1. Open a PSR, and click the **Affected Items** tab.
2. Click in one or more rows to select the items you want to delete.
3. Click the **Remove**  button.

The selected items are removed from the **Affected Items** tab after confirmation.

### To remove affected items in Web Client:

1. Open a PSR you want to work with, and click the **Affected Items** tab.
2. Select one or more rows for the items you want to delete.
3. Click the  **Remove** button.

The selected items are removed from the **Affected Items** tab after confirmation.

## Scenarios

In the following scenarios the **Rev Fixed** and **Latest Change** fields are updated.

### Scenario 1

A problem report is filed on a defective assembly Revision C. A corrective action is initiated to investigate the defective assembly. A deviation is immediately created that specifies the replacement of the faulty component. In this case, the **Latest Change** field will be updated with the number of the deviation.

After the root cause is identified, an engineering change order is created that will specify the permanent replacement of the defective component in the assembly, which will roll it to Revision D.

In the problem report, the **Rev Fixed** field will display Rev D, and the **Latest Change** field will display the ECO number.

### Scenario 2

A problem report is filed on a critical device that is causing lots of failures in the field and is deemed unusable. An immediate stop ship is ordered that specifies the severity of the problem. In this case, the **Latest Change** field in the problem report is updated to the stop ship number.

If, a permanent change is implemented through an ECO, later, then the **Rev Fixed** and **Latest Change** fields are updated according to the details of the ECO.

For standalone PSRs, the following cases are applied to update the **Latest Change** and **Rev Fixed** fields:


- If PSRs are not aggregated into a QCR, you can manually update the **Rev Fixed** field, which will automatically fill in the **Latest Change** field.
- If you manually overwrite the **Rev Fixed** field, but at a later time, a change is associated with this item, the **Rev Fixed** and **Latest Change** fields are still filled in automatically.
- For example, the **Rev Fixed** field for an item is A, and the **Latest Change** field is ECO10. Then another change is released, and the **Latest Change** field for the item is updated to ECO20. Now, if you manually select A in the **Rev Fixed** field, the **Latest Change** is automatically updated back to ECO10.
- **Rev Fixed** must always be later than **Rev Found**. If you specify a **Rev Fixed** date that is earlier than the **Rev Found** date, an error message appears.
- If **Rev Fixed** is filled in as the result of releasing the change, un-releasing the change encloses the **Rev Fixed** value in brackets.

## Related PSR Tab

The **Related PSR** Tab contains a list of all PSRs that are aggregated into the current PSR. The current PSR is considered the Parent PSR. An icon ● on the Related PSR tab indicates that it contains related PSRs and QCRs. Once you have created a PSR, you can edit information about related PSRs. You can also aggregate related PSRs into this PSR (the Parent).

For example, if multiple customers reported similar problems and you create a problem report for each customer. The Quality team determines that these problems are related and you can solve them with a single solution. To provide a solution and resolve all the related PSRs, the Quality team creates one PSR (Parent) and adds (Aggregates) all the related PSRs to the Parent PSR.

The Related PSR table has the following columns by default.

Field	Completed	Contains...
<b>PSR Criteria Met</b>	Automatically, when the PSR event criteria is met.	<p>Indicates when the PSR event occurred (that is, the parent PSR has reached the status selected for the PSR event).</p> <p>Once the parent PSR attains the status specified in the <b>PSR Event</b> field, then the related PSR status automatically moves to the status specified in the <b>PSR Result</b> field and completes the criteria specified. Once a criterion is met, the symbol  is displayed.</p>
<b>PSR 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 <i>Closed</i> 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 Event status only when both objects (parent and child) are assigned a workflow on the <b>Cover Page</b> tab.</p>
<b>PSR 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 <b>PSR Event</b> 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 <i>Closed</i> 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 <b>Cover Page</b> tab.</p>
<b>PSR Type</b>	Automatically	The type of related PSR.

Field	Completed	Contains...
<b>PSR Number</b>	Manually, when a related PSR is added.	The related PSR number.
<b>PSR Category</b>	Automatically	The quality incident category of the related PSR.
<b>PSR Description</b>	Automatically	Description 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. Severities are defined by the Agile PLM administrator.
<b>PSR Disposition</b>	Automatically	The way this PSR was resolved.
<b>PSR Expected Resolution Date</b>	Automatically	The related PSR expected problem resolution date.
<b>PSR Quality Analyst</b>	Automatically	The quality analyst assigned to the related PSR.  If the workflow is defined to notify the default quality analyst, the department or user in this field receives notifications about the PSR.
<b>PSR Workflow</b>	Automatically	The name of the workflow being used to move this PSR through the quality tracking process.
<b>PSR Status</b>	Automatically	The related PSR workflow status. If no workflow has been selected, this field is Unassigned.
<b>PSR Originator</b>	Automatically, when created.	The default creator of the PSR.
<b>PSR Date Originated</b>	Usually automatically, when created.	The date the related PSR was created.
<b>PSR Date Submitted</b>	Usually automatically, when created.	The date the related PSR was submitted.
<b>PSR Date Released</b>	Usually automatically, when created.	The date the related PSR was released.
<b>PSR Final Complete Date</b>	Usually automatically, when created.	The date the related PSR was completed.
<b>Aggregate PSR Number</b>	Automatically filled in when PSRs are added to the <b>Related PSR</b> tab.	This field is automatically filled in with the parent PSR number.

## Editing Related PSRs

If you have the appropriate privileges, you can edit and remove related PSRs.

### To edit related PSRs in Java Client:

1. Open a PSR and click the **Related PSR** tab.
2. Select the PSR row you want to edit, and click the **Edit** button.
3. In the editable fields, enter text or use the lists.
4. When you are finished, click **OK**.

The **PSR Event** drop-down list shows the available statuses of the Parent PSR. You can select statuses for the parent and the related PSR so 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. 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.

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**Note** By default, the **PSR Event** and **PSR Result** fields display the Closed status, but you can select the required status from the list. The **PSR Event** and **PSR Result** lists are empty if no workflow is assigned for either Parent or child PSRs.

---

### To edit related PSRs in Web Client:

1. Open a PSR and click the **Related PSR** tab.
2. Select one or more PSR rows you want to edit, and click **Edit**.
3. When you are finished, click **OK**.

The **PSR Event** list shows the available statuses of the Parent PSR. You can select statuses for the parent and the related PSR so 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. 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.

---

**Note** By default, the **PSR Event** and **PSR Result** fields display the Closed status, but you can select the required status from the list. The **PSR Event** and **PSR Result** lists are empty if no workflow is assigned for either Parent or child PSRs.

---



## Adding Related PSRs to the Parent PSR

You can add related PSRs to a Parent PSR.

After you add related PSRs to the 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 automatically fills in the Aggregate PSR Number field.

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

1. Open a PSR and click the **Related PSR** tab.
2. Click the **Add** menu and choose one of the following options:



-  **Create** – Select a type from the **Type** list. If appropriate, enter an object number. Click **OK**.
-  **Search** – Search for one or more existing PSRs. In the Add Related PSRs dialog box, select a search method. If you choose 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 **Bookmark** or a **Recently Visited** PSR (Shortcuts). If you want to edit fields after adding related PSRs, make sure the **Edit Rows After Adding** box is checked. In the search results, select the PSRs you want, and click **OK**. All PSRs in the **Selected Related PSR** list are added to the Related PSR table.

---

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

---

#### To add related PSRs to the parent PSR in Web Client:

1. Open a PSR and click the **Related PSR** tab.
2. Click the **Add** menu and choose one of the following options:
  -  **Create New** – Select a type from the **Type** list. You can enter an Object number if applicable. Click **OK**.
  -  **Search** – Search for one or more existing PSRs. In the Add Related PSRs dialog box, select a search method. If you choose 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 **Bookmark** or a **Recently Visited** PSR (Shortcuts). If you want to edit fields after adding related PSRs, make sure the **Edit Rows After Adding** box is checked. In the search results, select the PSRs you want, and click **OK**. All PSRs in the **Selected Related PSR** list are added to the Related PSR table.


---

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

---


## Removing Related PSRs

#### To remove a related PSR in Java Client:

1. Open a PSR and click the **Related PSR** tab.
2. Click in the row to select the related PSR you want to delete.
3. Click the  **Remove** button.

The selected PSR is removed from the **Related PSR** tab after confirmation. The number of the Parent PSR is removed from **Aggregate PSR Number** field on the Cover Page of the child PSR.

#### To remove a related PSR in Web Client:

1. Open the PSR you want to work with, and click the **Related PSR** tab.
2. Select the related PSR you want to delete.
3. Click the  **Remove** button.

The selected PSR is removed from the **Related PSR** tab after confirmation. The number of the Parent PSR is removed from the **Aggregate PSR Number** field on the Cover Page of the child PSR.

## Relationships Tab

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

The Relationships tab:

- Enables several objects to be added as deliverables on a project or task.
- Enables relationships tab on several Agile objects to add, edit, and view relationships with projects/tasks.
- Relationship objects have a rule associated with them.

## Relationships - Classes Table

The following table lists all the Agile objects and explains what needs to be enabled for relationships and references.

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

In the Relationship with a Rule column:

- **Yes** - Indicates that the functionality will be added in its class and subclasses.
- **No** - Indicates that the functionality will not be supported.

In the Event/Result column:

- **Workflow** - Indicates that the event/ result for that class object will be based on workflow states of that object.
- **Lifecycle** - Indicates that the event/result for that class object will be based on Lifecycle states for that class.

Agile Base Class	Agile Classes	Event/ Result	Relationship with a Rule	References- Relationship with no rule	Life cycle under Change Control
<b>Changes</b>	Change Orders	Workflow	Exists	Exists	NA
	Change Requests	Workflow	Exists	Exists	NA
	Deviations	Workflow	Exists	Exists	NA
	Manufacturers Orders	Workflow	Exists	Exists	NA

<b>Agile Base Class</b>	<b>Agile Classes</b>	<b>Event/ Result</b>	<b>Relationship with a Rule</b>	<b>References- Relationship with no rule</b>	<b>Life cycle under Change Control</b>
	Price Change Orders	Workflow	Exists	Exists	NA
	Site Change Orders	Workflow	Exists	Exists	NA
	Stop Ship	Workflow	Exists	Exists	NA
<b>Customers</b>	Customers	Lifecycle	Yes	Yes	No
<b>Declarations</b>	Homogeneous Material Declaration	Workflow	Exists	Exists	NA
	IPC 1752-1 Declarations	Workflow	Exists	Exists	NA
	IPC 1752-2 Declarations	Workflow	Exists	Exists	NA
	JGPSSI 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
<b>File Folders</b>	File Folders	Lifecycle	Exists	Exists	No
<b>Items</b>	Documents	Lifecycle	Yes	Yes	Yes
	Parts	Lifecycle	Yes	Yes	Yes
<b>Manufacturer Parts</b>	Manufacturer Parts	Lifecycle	Yes	Yes	No
<b>Manufacturer</b>	Manufacturer	Lifecycle	Yes	Yes	No
<b>Packages</b>	Packages	Workflow	Yes	Yes	NA
<b>Part groups</b>	Part Groups	Lifecycle	Yes	Yes	No
<b>Prices</b>	Published Process	Lifecycle	Yes	Yes	Yes
	Quote Histories	Lifecycle	Yes	Yes	Yes
<b>PSRs</b>	Non-Conformance	Workflow	Exists	Exists	NA

<b>Agile Base Class</b>	<b>Agile Classes</b>	<b>Event/ Result</b>	<b>Relationship with a Rule</b>	<b>References- Relationship with no rule</b>	<b>Life cycle under Change Control</b>
	Reports				
	Problem Reports	Workflow	Exists	Exists	NA
<b>Programs</b>	Activities	Workflow	Exists	Exists	NA
	Gates	Workflow	Exists	Exists	NA
<b>QCRs</b>	Audits	Workflow	Exists	Exists	NA
	Corrective and Preventive Action	Workflow	Exists	Exists	NA
<b>Requests for Quotes</b>	Requests for Quotes	Lifecycle	Yes	Yes	No
<b>RFQ responses</b>	RFQ Responses	Lifecycle	Yes	Yes	No
<b>Sites</b>	Sites	Lifecycle	Yes	Yes	No
<b>Sourcing Projects</b>	Sourcing Projects	Lifecycle	Yes	Yes	No
<b>Specifications</b>	Specifications	Lifecycle	Yes	Yes	No
<b>Substances</b>	Materials	Lifecycle	Yes	Yes	No
	Sub Parts	Lifecycle	Yes	Yes	No
	Substance Groups	Lifecycle	Yes	Yes	No
<b>Suppliers</b>	Suppliers	Lifecycle	Yes	Yes	No
<b>Transfer Orders</b>	Automated Transfer Orders	Workflow	Yes	Yes	NA
	Content Transfer Orders	Workflow	Yes	Yes	NA
<b>User Groups</b>	User Groups	None	No	Yes	NA
<b>Users</b>	Users	None	No	Yes	NA
<b>Action Items</b>	Action Items	Status Attribute	No	No	NA
<b>Discussions</b>	Discussions	Status Attribute	No	Yes	NA

Agile Base Class	Agile Classes	Event/ Result	Relationship with a Rule	References-Relationship with no rule	Life cycle under Change Control
Reports	Custom Reports	None	No	No	NA
	External Reports	None	No	No	NA
	Standard Reports	None	No	No	NA


## Attributes of the Relationships Tab

- When an object is added to a project as a deliverable, the project gets added on the Relationship tab of that object. You can define a relationship rule between these two objects and the rule can be viewed from both objects.
- When you add Object 1 as a relationship to Object 2, it creates a reverse relationship by which Object 2 will be displayed under the Relationship tab of Object 1.
- You can add a PPM object under the Relationship tab of an object that is a deliverable. This will in turn display this object as a deliverable for the PPM object under the deliverable tab.
- 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 is displayed 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 is moved to Production, then the first revision that resulted in production phase will be shown here.
  - The name field value is hyperlinked 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, the rule is displayed in the table and you can edit it from the Preview Pane.
  - When the criteria are met, the attachments that are related to the folder version will be displayed with the folder version.
  - By default the Relationship table is sorted in an alphanumeric order and by the name attribute in an ascending order.

The name field will be displayed as follows for the following objects:

Object	Name Field Display
Item	<Item Number>Rev:<Revision>
Activity and Gate	Activity/Gate (Root Activity)
Customer	Customer Name (Customer Number)
Supplier	Supplier Name (SupplierNumber) or Supplier Display Name
Manufacturer Part	Manufacturer Number (Manufacturer's Name)
File Folder	File Name1.ext, File Name 2. ext, ..( display all files under the file folder)Ver: <Version>

The Relationships table has the following columns by default.

Field	Completed	Contains
<b>Criteria Met Icon</b>	Automatically, when the added object relationship rule criteria is met.	Indicates when the added object attains the status specified. Once a criterion is met, the Criteria Met symbol  is displayed.
<b>Type (Image)</b>	Automatically	The type of the added object.
<b>Name</b>	Automatically	The name/number of the added object. You can add items (parts, documents), changes, manufacturers, manufacturer parts, customers, sourcing projects, RFQs, suppliers, PE-related objects.
<b>Description</b>	Automatically	The description of the added object.
<b>Current Status</b>	Automatically, when object is added.	The current status of the related object.
<b>Rule</b>	Automatically, when rule is added.	Indicates the relationship rule applied to the object. <b>Note:</b> You can specify <b>Rule</b> only when objects are assigned a workflow on the Cover Page.
<b>Type</b>	Automatically	The type of the added object.
<b>Relationship Type</b>	Automatically	Indicates the relationship type.

## Relationship Rules

- You can define a rule only from a lifecycle object to a workflow object.

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 from a Problem Service Request (workflow object) PR00061 to (workflow object) Engineering Change Order. The rule says that **When** the state of PR00061 is Released, **Set** the Engineering Change Order to Released. The positions of the “From Object” (PR00061) and the “To Object” (Engineering Change Order) are fixed in the rule so that the rule only impacts 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.**

A relationship rule can only be defined between a lifecycle object and a workflow object and not between two lifecycle objects.

## Adding Objects to the Relationships Table

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

1. Open the PSR, and click the **Relationships** tab.
2. Click the **Add**  menu and choose one of the following options:
  - **Create** – Select a type from the **Type** list. You can also enter an object number if applicable.
  - **Search** – Search for one or more existing objects.

In the **Add Relationship** dialog box, select a search method. If you choose 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 bookmark or recently visited objects (Shortcuts). If you want to edit fields after adding related objects, ensure that the **Edit rows after adding** option is checked.

3. In the search results, select the objects.
4. Click **OK**.


The objects in the Selected Related Objects list are added to the Relationships table.

---

**Note** When you add an object to the Relationships table of a PSR, the PSR is added on the **Relationships** tab of the object.

---

**To add objects to the Relationships table in Web Client:**

1. Open the PSR, and click the **Relationships** tab.
2. Select the **Add**  menu and choose one of the following options:
  - **Create New** – Displays a dialog box from which you can select a value or object from the **Type** drop-down list. You can also enter an object number if applicable.
  - **Search** – Displays the Search dialog box from which you can search for one or more existing objects.

In the **Add Relationships** dialog box select a search method. If you choose to perform a simple search, enter the value to search for and click **Search**.

You can also define a parametric search, an advanced search, run a saved search, select a bookmark or recently visited objects (Shortcuts). If you want to edit fields after adding related objects, ensure that the **Edit Rows After Adding** option is checked.

3. In the search results, select the objects and click **Add Selections**.
4. Click **OK**.

The selected objects are added to the Relationships table.

---

**Note** When you add an object to the Relationships table of a PSR, the PSR is added on the **Relationships** tab of the object.

---

## Editing and Removing Objects in the Relationships Table

After you have created a problem report or non-conformance report, you can edit the report to provide additional information you did not include when you created it. You can also edit any information that has changed since the PSR was created.

**To edit objects in the Relationships table:**

1. Open the PSR, and click the **Relationships** tab.
2. Select the object you want to edit.
3. Click the **Edit Relationship** icon and edit the appropriate fields.
4. Click **Save**.

The Cover Page displays the edited version of the object.

**To remove objects in the Relationships table:**

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


The selected object is removed after confirmation.

## Filter

Filters narrow down the objects in the relationship tab of PSRs by the rule they contain. You can filter relationships with the attributes you configure using the View Filter option. The default View Filter options consists 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.

To filter relationships further, additional filter attributes are provided.

Click **Show Filter**  icon, and you can filter by the following attributes:

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

You can further filter on the **Criteria Met** attribute using the following conditions:

- If Yes, then returns rows where it is checked.
- If No, then returns only relationship rows for which criteria are not met.
- If Null, then returns only rows with no rules (reference rows).
- If Not Null, then returns all relationship rows.

## Preview Pane

In the **Relationships** table, when you add a relationship to an object, details about the relationship displays in the lower pane called the **Preview Pane**.

The preview pane also displays the attributes and actions that you can perform on the relationship object.

The name field is a hyperlink which displays information about the object on the preview pane. The revision field displays a drop-down which lists all the revisions of the object. You can choose the revision and the preview pane displays details such as attachments, etc., of that revision.

You can add a **Rule** to the Relationship.

1. Click on the **Add Rule** link in the Preview Pane. A Relationship Rule window appears.

2. Specify the rule and click **Save**.
  - Click on the **Edit rule** link to edit the rule.
  - Click on the **Remove rule** link to remove the rule.

You can also perform actions like **Add**, **Remove**, and **View** on the object from the preview pane.

Thus you can add attachments, content, affected items, prices, and create changes to the Relationship object on the preview pane.

You can also:

- **Add files** - By file name and description.
- **Add URLs** - By name and description (Internet Address).
- **Add By search** - Search for existing files. To perform a simple search, enter the value and click **Search**. You can also define an advanced search, run a saved search or select a recently visited item (shortcuts). You can also search in the Search Attachment Contents.

## Workflow Tab of a PSR

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 the quality control process. The status with the orange background (Web-Client) or yellow background (Java-Client) is the current status. The Signoff History table displays past workflow and sign-off information for the PSR.

For example, a PSR can be routed internally for preliminary investigation, or to a manager for escalation to identify if it merits a corrective action. It can also be routed to the support call center or the field service technician, who can provide more detailed information or to the customer for final approval of an implemented fix or to a supplier for a response to the incident, and so on.

---

**Note** Workflows for product service requests work the same way as for other routable objects.

---

## Attachments Tab of a PSR

You can reference files and URLs from the **Attachments** tab of Agile PLM objects. Attachment files and URLs can be tracked and searched, when you attach a file to an object. It is also added 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 (also 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

You can view, copy, delete, and print attachment files. You can also check in and check out attachments (although you are actually checking file folder objects in and out).

## Submitting and Routing PSRs

You can submit and route PSRs using the **Next Status** button. The process is the same as for submitting and routing other routable objects. Before switching the PSR to a different status, always audit it to detect any errors that may prevent switching to a different status.

For more information about the default workflows for PSRs, see the *Agile PLM Administrator Guide*.

When you submit a PSR, the Quality Analyst is notified by email. The Quality Analyst can also use the searches in Workflow Routings area of the Home Page or Quality Searches folder to find recently submitted PSRs.

# Working with Quality Change Requests



This chapter includes the following:

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## Creating QCRs


You must have the necessary privileges to create a QCR object. A QCR object is created the same way other Agile PLM objects are created. You can use the **New Object** button or the **Save As** feature.

### To create a QCR in Java Client:

1. Click the **New Object** button . The New Object dialog box appears.
2. In the **Type** list, select Audit or CAPA.
3. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
4. Click **OK**.

Agile Java Client creates the QCR object and displays the QCR (audit or CAPA) with the **Cover Page** tab on top.

### To create a QCR in Web Client:

1. From the main toolbar, choose **Create**, select **Quality Change Request** and then select **Audit** or **Corrective and Preventive Actions**. The Create Quality Change Request wizard appears.
2. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
3. Click **Next**. The Enter Cover Page Information page appears.
4. Enter the required information. You can assign a workflow to route the QCR through the workflow statuses.
5. Click **Next**. The Add Affected Items page appears.
6. Click the **Add** button to add one or more items. The Add Affected Items Wizard appears. For more details, see [Adding Affected Items](#) on page 22.
7. Click **Next** to add attachments. The Add Attachments page appears.

8. Click the **Add** button to add attachments if necessary. The Add Attachments Wizard appears. For more details, see [Attachments Tab of a PSR](#) on page 37.

9. Click **Finish**.

Agile Web Client creates the QCR and displays it with the **Cover Page** tab on top. If a workflow is not assigned to the QCR, the status is Unassigned. To assign a workflow, click the **Edit** button on the Cover Page and select a workflow from the **Workflow** list.

Notice that the Default Audits and Default CAPAs workflow statuses are different from those for other routable objects. The audit workflow starts with Prepared and the CAPA workflow starts with Identified.

---


**Note** The audit reminder will be sent to originator and quality administrator before the audit date. If you have Modify privileges, you can configure the audit reminder date in the [\\agile\\_home\agileDomain\config\agile.properties](#) file.

---

## Creating a QCR Using Save As

You can use **Save As** to create a QCR. Save As copies data from a field in the existing object to the same field in the new object. If a field or list value in the existing object is not available in the new object, then that field or list value is not copied to the new object.


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

1. Open the QCR you want to use as the basis for the new QCR. Right-click, and choose **Save As**. Or choose **File** and select **Save As** from the main toolbar. The New Object dialog box appears.
2. From the **Type** list, select Audit or CAPA.
3. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
4. Click **OK**.

Agile Java Client creates the QCR (audit or CAPA) and displays the QCR with the **Cover Page** tab on top.

5. Make appropriate modifications on the tabs.
6. Click **Save**.

### 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. Choose **Actions** and select **Save As**.
2. Select Audit or CAPA from the **Subclass** list.
3. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
4. Click **Save**. The new object opens.
5. Click the **Edit** button to make appropriate modifications to the tabs.
6. Click **Save**.

---

**Note** If the Agile PLM Administrator has set the appropriate preferences, fields in the optional **Page Two** and **Page Three** sections are copied to the new object. For information about the behavior of Page Two and Page Three fields in your Agile PLM system, see your Agile PLM Administrator. 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.

---

## Completing and Editing a QCR

After a QCR is created, you can edit the report to provide additional information you did not include when you created it. You can also edit any information that has changed since the QCR was created.

Complete the appropriate fields on the **Cover Page** tab. For details see [Cover Page Tab of a QCR](#) on page 43.

1. Click the **Affected Items** tab. You can add, edit, or remove affected items using the **Add**, **Edit**, and **Remove** buttons. In the editable fields, enter text or use the drop-down lists. Adding, editing, and removing item is the same as for PSRs. For more details, see [Affected Items Tab of a PSR](#) on page 19.

In the PSR Items table, the items associated with PSRs are listed. If you add PSRs to the **Relationships** tab, all items of those PSRs are automatically added to the PSR Items table. If you are auditing or taking corrective action on items listed in the PSR, when the fix is checked and verified, the QCR can move to the Validate and then the Closed status.

2. To route the QCR through the workflow statuses, click the **Workflow** tab. If you assigned a workflow when you created the QCR, the assigned workflow chart appears on this tab. If it is not displayed, you can assign it by selecting a workflow on the Cover Page.

Click the **Next Status** button or the required status to change the status of workflow in the workflow chart. When you change the status, you specify approvers and observers to be notified.

3. Click the **Relationships** tab.

Add relationships or edit any of the existing relationships listed. For more details, see Relationships tab.

4. Click the **Attachments** tab.

Add attachments as needed, or edit any of the existing attachments listed.

If you have the appropriate privileges, you can edit a QCR. You cannot edit closed QCRs unless you have the specific privilege to do so.

### To edit a QCR:


1. Open the QCR you want to edit.
2. In the editable fields, enter text or use the drop-down lists.
3. When you are finished, click **Save**.

The QCR displays the Cover Page with the latest edition.

## Creating a QCR from a PSR or an Item

You can create a QCR directly from a PSR or an individual item. The QCR allows you to aggregate incoming 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.

When you create a QCR from a PSR, the following information is copied:

- The PSR is added to the **Relationships** tab of the QCR.
- The QCR is added to the **Relationships** table of the PSR.
- All information on the **Affected Items** tab of the PSR is added to the PSR Items table on the **Affected Items** tab of the QCR.
- An icon  in the QCR **Affected Items** tab indicates that it contains a PSR item.


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

When you create a QCR from an item to drive a problem to closure, the following information is copied:

- The item is added to the **Affected Items** tab of the QCR.
- The QCR is added to the QCRs table on the **Quality** tab of the item.


After the QCR is approved, you can route the item through the change to make sure that the defect is rectified and changed to new revision of the item.

### To create a QCR from a PSR or an item in Java Client:

1. Open the PSR or item from which you want to create a QCR. Right-click in the object window, and choose **Create Quality Change Request** from the shortcut menu.
2. Select Audit or CAPA from the **Type** list.
3. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
4. Click **OK**.

Agile Java Client creates the QCR.

### To create a QCR from a PSR or an item in Web Client:

1. Open the PSR or item from which you want to create a QCR. Choose **Actions > Quality Change Request**. The Quality Change Request Wizard appears.
2. Select Audit or Corrective and Preventive Actions from the **Subclass** list.
3. In the **Number** field, accept the number that appears. You can also type a number or click the **AutoNumber** button  to generate the next number.
4. Click **Finish**.

Agile Web Client creates the QCR.

## Cover Page Tab of a QCR

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


Field	Completed	Contains...
<b>QCR Number</b>	Automatically, when created.	The number assigned to the QCR when you create it.
<b>QCR Type</b>	Automatically, when created.	The type (subclass) selected when you create the QCR.
<b>Category</b>	Manually	The list of categories defined by the Agile PLM administrator, for example:  Customer Complaint Audit - External Preventive Action
<b>Description</b>	Usually manually; can contain a default.	The 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).
<b>Reason</b>	Usually manually; can contain a default.	Reason for creating this QCR. 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).
<b>Customer</b>	Manually	The customer associated with this QCR.
<b>Supplier</b>	Manually	The list of suppliers.  For example, you can initiate a QCR for suppliers to audit them or to generate a SCAR (supplier corrective action request) if the supplier has problems with its process, products, or other areas, and they need to be resolved.

Field	Completed	Contains...
<b>Workflow</b>	<p>If more than one workflow applies to the QCR, the workflow is selected manually; the workflow selection can be changed as long as the QCR is in the Pending status type. Selecting the blank field in the workflow list switches the QCR to the Unassigned status.</p> <p>If no workflow is assigned, and you move the QCR to the next status from the Unassigned status, you are prompted to select a workflow</p>	The name of the workflow used to move this QCR through the quality control process.
<b>Quality Administrator</b>	Selected manually from a list. Departments appear first in the list, followed by individual user names.	The default quality administrator. If the workflow is defined to notify the default quality administrator, the user groups or user in this field receives notifications about the QCR. If this field is left blank, then the notifications are sent to every quality administrator on the list. If the notification definition in the workflow is blank, no notifications are sent.
<b>Status</b>	Automatically, when created; updated as the QCR moves through the assigned workflow.	Workflow status. If no workflow has been selected, this field is Unassigned.
<b>Originator</b>	Usually automatically, when created (with the default set by the Agile PLM administrator).	The originator or quality administrator who created the QCR.
<b>Date Originated</b>	Usually automatically, when created.	The date the QCR was created.
<b>Date Submitted</b>	Automatically generated based on workflow status.	The date when the QCR moves to the Submitted status in the workflow.
<b>Date Released</b>	Automatically generated based on workflow status.	The date when the QCR moves to the first Released status in the workflow.
<b>Final Complete Date</b>	Automatically, when the QCR enters the Complete type status.	The date the QCR moved into the Complete status type.
<b>Preventive Action</b>	<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>	A proactive action to prevent the problem from happening again in the future. This applies only to CAPAs.

Field	Completed	Contains...
<b>Root Cause Analysis</b>	Manually. 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).	The root cause of the problem. For example, when there is a problem, engineers analyze why the problem occurred, all the way to the origin (root) of the problem. The information about their methods can be entered in this field. This applies only to CAPAs.
<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 a corrective action is implemented, the quality analyst performs audits to make sure the corrective action really solved the problem. If the fix for the problem is validated, then the audit result is pass. Otherwise, the audit fails, and the quality analyst updates <b>Audit Result</b> field.	Audit process result. The default setting for audit result is Pass/Fail. Your administrator can define lists of other audit results. For more details, check with your administrator. Incoming problem is audited and the result is specified.
<b>Product Line(s)</b>	Usually manually; can contain a default.	List of product lines defined by the Agile PLM administrator.

## Affected Items Tab of a QCR

The **Affected Items** Tab of a QCR includes the Affected Items tables and PSR Items tables.

The Affected Items table lists the items that are affected by the QCR. If you have the appropriate privileges, you can modify this table and add items that are affected by this QCR. An icon  displayed in the **Affected Items** tab of a QCR indicates that it contains a PSR item.

Affected Items Table

Field	Completed	Contains...
<b>Item Number</b>	Automatically, when created.	Number of the affected item.
<b>Item Description</b>	Automatically, when created.	Description of the item.
<b>Item Rev</b>	Manually	The revision of the affected item in which the problem is found. For example, if the item has undergone five revisions, and this defect is identified in revision B, then the <b>Item Rev</b> 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.

Field	Completed	Contains...
Affected Site	Automatically, when created.	The site at which the affected items are having problems.

The PSR Items table lists the items that are referenced by problem reports and non-conformance reports associated with this QCR. This table is filled in automatically 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.

#### PSR Items Table

Field	Completed	Contains...
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 the problem is found.
Affected Site	Automatically, when created.	The site at which the affected items are having problems.
PSR Number	Automatically, when created.	The number of the PSR associated with this QCR.

## Relationships Tab of a QCR

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

The **Relationships** tab of a QCR is similar to that of a PSR. For details, see Relationships tab.

## 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) indicates the current status. The Signoff History table displays past workflow and signoff information for the QCR.

For example, a QCR can be routed to a manager for escalation to identify if corrective action should be taken. It can also be routed to the support call center or the field service technician, who can

provide more detailed information, to the customer for final approval of an implemented fix, to a supplier for a response to the incident, and so on.

## Attachments Tab of QCR

You can reference files and URLs from the **Attachments** tab of Agile PLM objects of a QCR. The **Attachments** Tab of the QCR is similar to that of a PSR. For details, see [Attachments Tab of a PSR](#) on page 37.

## Submitting and Routing QCRs

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, the Quality Administrator is notified 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.



# Managing PSRs

**This chapter includes the following:**

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## Approving, Rejecting, and Commenting on PSRs

When a PSR is in a Review type or Released type status, you can approve, reject, or comment on the PSR by clicking the appropriate button in the toolbar. For details, see the *Getting Started Guide*.

---

**Note** Comments can be added to a PSR in any status except the Closed status.

---

## Releasing a PSR

You can release PSR by using the **Next Status** button or the **Workflow** tab. If the AutoPromote property of the preceding Review status type is set to Yes, the routable object is automatically released when all the approvers have approved the change.

Before a PSR can be released, it needs to be audited and pass the audit release. The system will check the following audit for each status level:

For status types **Pending**, **Review**, **Released**, and **Complete**:

- Required fields for the current status level will be checked. (Your Agile Administrator determines which fields are required in the workflow property settings.)

For status type **Review**:

- Approval of all approvers will be checked.

For status type **Released**:

- All current release audit rules will be checked.

For detailed steps to release PSR, see chapter *Routing Objects with Workflows* in the *Getting Started Guide*.

## Deleting a PSR


Agile Java Client supports *soft* and *hard* deletes. To permanently delete an object from the Agile

database, you must first soft-delete it, then hard-delete it. For more information about soft-deleted and hard-deleted objects, see the *Getting Started Guide*.

You cannot delete a PSR if:

- It exists in a QCR's **Relationships** tab (cannot delete if PSR is currently part of a corrective action process; you can remove the PSR from the QCR and then delete the PSR).
- It exists in the **Related PSR** tab of another PSR (cannot delete if PSR is currently part of a larger problem; you can remove this PSR from the parent PSR and then delete it).
- It exists in the **Related PSR** tab (cannot delete if PSR is being used to aggregate multiple problems; you can remove the related PSRs and then delete it).
- It is in any state other than **Pending** or **Unassigned** (therefore, it can be deleted in Pending or Unassigned states).

#### To soft-delete a PSR in Java Client:

1. Select and open a PSR.
2. Click the **Delete**  button in the toolbar.  
Or choose **Edit | Delete** from the menu bar.

Or right-click in the PSR window and choose **Delete** from the shortcut menu.


The PSR is soft-deleted. It is no longer available for use. However, until it is hard-deleted, its number is reserved in the Agile database and cannot be reused.

#### To soft-delete a PSR in Web Client:

1. Select and open a PSR.
2. Click the **Actions | Delete**.

The PSR is soft-deleted. It is no longer available for use. However, until it is hard-deleted, its number is reserved in the Agile database and cannot be reused.

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

1. Find the soft-deleted PSR you want to hard-delete.  
From the **Recycle Bin Searches** folder, select the **Deleted Product Service Requests** to locate the soft-deleted PSR you want to hard-delete.
2. Select and open the soft-deleted PSR you want to hard-delete.
3. Click the **Delete**  button in the toolbar.  
Or choose **Edit | Delete** from the menu bar.  
Or right-click in the PSR window and choose **Delete** from the shortcut menu.  
The PSR is now hard-deleted from the database.

---

**Note** Hard-deleting an object releases its number to be reused if needed.

---

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

1. Find the soft-deleted PSR you want to hard-delete.  
From the **Recycle Bin Searches** folder, select the **Deleted Product Service Requests** to locate the soft-deleted PSR you want to hard-delete.

2. Select and open the soft-deleted PSR you want to hard-delete.
3. Click the **Actions | Delete**.

The PSR is now hard-deleted from the database.

---


**Note** Hard-deleting an object releases its number to be reused if needed.

---

## Undeleting a PSR

Since soft-deleted objects still exist in the database, you can undelete them, if you have the necessary privileges.

### To undelete a PSR in Java Client (if you have the appropriate privileges):

1. Find the soft-deleted PSR you want to undelete.  
From the **Recycle Bin Searches** folder, select the **Deleted Product Service Requests** to locate the soft-deleted PSR you want to undelete.
2. Select and open the soft-deleted PSR you want to undelete.
3. Click the **Undelete**  button in the toolbar.
4. You can also right-click in the PSR window and choose **Undelete** from the shortcut menu.  
The PSR is now undeleted from the database.

### To undelete a PSR in Web Client (if you have the appropriate privileges):

1. Find the soft-deleted PSR you want to undelete.  
From the **Recycle Bin Searches** folder, select the **Deleted Quality Change Requests** to locate the soft-deleted PSR you want to undelete.
2. Select and open the soft-deleted PSR you want to undelete.
3. Click **Actions | Undelete**.  
The PSR is now undeleted from the database.

## Closing a PSR

PSRs can be closed (promoted to their Complete status) in the following ways:

- Users with appropriate privileges can manually close a PSR.
- By setting the **Rule** on **Relationships** tab of the PSR so that PSR result is closed.

## Actions Menu in a 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 enable you to notify Originator of the changes in the objects. Needs

necessary privileges.

- **Save As:** Saves the PSR with all editions for future retrieval.
- **Delete:** Deletes the PSR.
- **Copy URL to Clipboard:** Takes you to the location you were in by copying the URL to the Clipboard.
- **Print:** Prints the PSR.
- **Export:** Exports the PSR to a delimited text file(CSV) or to Microsoft Excel Notebook.
- **Send:** Sends the PSR to other Users who have the necessary Roles and Privileges.
- **Sharing:** Enables other Users to share the object. Needs necessary privileges.
- **Create Quality Change Requests:** Allows you to create a quality change request on the PSR.
- **View Workflows:** Allows you to view the current state the workflow of the PSR is in.

# Managing QCRs

**This chapter includes the following:**

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## Approving, Rejecting, and Commenting on QCRs

When a QCR is in a Review or Released type status, you can approve, reject, or comment on the QCR by clicking the appropriate button in the toolbar. For details, see the *Getting Started Guide*.

### Approving a QCR

If you are specified as an Approver on a QCR, then you have to verify if the audit or corrective action has been implemented and tested for a specific item.

**To approve a QCR:**

1. Open the QCR you want to approve. Click the  **Approve** button. The Approve wizard appears.
2. In the **Comments** field, enter approver comments.
3. In the **Password** field, enter your password.
4. If you want to approve on behalf of your group, click **Approving for Groups**.  
You can also notify users that you have approved the QCR.
5. Select the users you want to notify and click **Notify**.
6. Click the  **Approve** button.

---


**Note** Comments can be added to a QCR in any status except the Closed status.

---

### Commenting on a QCR

If you hold appropriate privileges, you can comment on QCRs and notify the comment to Originators, Reviewers and even Users.

### To comment on a QCR:

1. Open the QCR.
2. Click the  **Comment** button on the Cover Page. The Comment dialog opens.
3. In the **Comments** field, enter your comments.
4. To notify the Originator, Quality Administrator and Reviewers about your comments, select the respective check boxes.



You can also notify certain users about your comments on the QCR.

5. Select the users you want to notify and click **Notify**.
6. Click the **Comment** button.

## Rejecting a QCR

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

### To reject a QCR:

1. Open the QCR you want to reject.
2. Click the  **Reject** button. The Reject wizard appears.
3. In the **Comments** field, enter Approver comments.
4. In the **Password** field, enter your password.  
You can also notify users that you have rejected the QCR.
5. Select the users you want to notify and click **Notify**.
6. Click the  **Reject** button.

## Releasing a QCR

Click **Actions > Audit Release** to release a QCR.

The following are checked for the audit release of a QCR:

- If the QCR displays a warning when there exists an unreleased Change in the **Relationships** tab. This ensures that the Change is released and verified before releasing the QCR, not just ECO.
- If the QCR displays a warning when an item in the QCR Affected Items or PSR Items does not exist on the Affected Items list of the Change. This ensures that all the items from the QCR are accounted for in one or more related Change.

## Deleting a QCR


Agile Java Client supports *soft* and *hard* deletes. To permanently delete an object from the Agile

database, you must first soft-delete it, then hard-delete it. For more information about soft-deleted and hard-deleted objects, see the *Getting Started Guide*.

You can delete a QCR that meets the following conditions:

- You cannot delete a QCR if it has even one PSR in the **Relationships** tab. You cannot delete a QCR if the corrective action process contains problems. You have to remove the PSR from the QCR and then delete the QCR.
- You cannot delete a QCR if it has even one Change in the **Relationships** tab. You cannot delete a QCR if the corrective action process is already routed through engineering changes. You have to remove the Changes from the QCR and then delete the QCR.
- You cannot delete a QCR if it is in any state other than **Pending** or **Unassigned** (therefore, it can be deleted in Pending or Unassigned states).

#### To soft-delete a QCR in Java Client:

1. Select and open a QCR.
2. Click the **Delete**  button in the toolbar.

Or right-click in the QCR window and choose **Delete** from the shortcut menu.

The QCR is soft-deleted. It is no longer available for use. However, until it is hard-deleted, its number is reserved in the Agile database and cannot be reused.

#### To soft-delete a QCR in Web Client:

1. Select and open a QCR.
2. Click the **Actions | Delete**.

The QCR is soft-deleted. It is no longer available for use. However, until it is hard-deleted, its number is reserved in the Agile database and cannot be reused.

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

1. Find the soft-deleted QCR you want to hard-delete.

From the **Recycle Bin Searches** folder, select the **Deleted Quality Change Requests** to locate the soft-deleted QCR you want to hard-delete.

2. Select and open the soft-deleted QCR you want to hard-delete.

3. Click the **Delete**  button in the toolbar.

Or right-click in the QCR window and choose **Delete** from the shortcut menu.

The QCR is now hard-deleted from the database.

---

**Note** Hard-deleting an object releases its number to be reused if needed.

---

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

1. Find the soft-deleted QCR you want to hard-delete.

From the **Recycle Bin Searches** folder, select the **Deleted Quality Change Requests** to locate the soft-deleted QCR you want to hard-delete.

2. Select and open the soft-deleted QCR you want to hard-delete.

3. Click **Actions | Delete**.

The QCR is now hard-deleted from the database.

---

**Note** Hard-deleting an object releases its number to be reused if needed.

---

## Undeleting a QCR

Since soft-deleted objects still exist in the database, you can undelete them if you have the necessary privileges.

### To undelete a QCR in Java Client (if you have the appropriate privileges):

1. Find the soft-deleted QCR you want to undelete.

From the **Recycle Bin Searches** folder, select the **Deleted Quality Change Requests** to locate the soft-deleted QCR you want to undelete.

2. Select and open the soft-deleted QCR you want to undelete.

3. Click the **Undelete**  button in the toolbar.

You can also right-click in the QCR window and choose **Undelete** from the shortcut menu.

The QCR is now undeleted from the database.

### To undelete a QCR in Web Client (if you have the appropriate privileges):

1. Find the soft-deleted QCR you want to undelete.

From the **Recycle Bin Searches** folder, select the **Deleted Quality Change Requests** to locate the soft-deleted QCR you want to undelete.

2. Select and open the soft-deleted QCR you want to undelete.

3. Click the **Actions | Undelete**.

The QCR is now undeleted from the database.

## Closing a QCR

If you have the appropriate privileges, you can close a QCR (promote it to its Complete type status). Typically, when a Change or an ECO related to a QCR is released, the Quality Administrator determines whether that QCR is resolved and can be closed.

You can close QCRs (promoted to their Complete type status) in the following ways:

- Users with appropriate privileges can manually close a QCR.
- By setting the **Rule** on **Relationships** tab of the QCR. Once the criterion is met the QCR result is closed.

## 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 enable you to notify Originator of the changes in the objects. Needs necessary privileges.
- **Save As:** Saves the QCR with all editions for future retrieval.
- **Delete:** Deletes the QCR.
- **Copy URL to Clipboard:** Takes you to the location you were in by copying the URL to the Clipboard.
- **Print:** Prints the QCR.
- **Export:** Exports the QCR to a delimited text file (CSV) or to a Microsoft Excel Workbook.
- **Send:** Sends the QCR to other Users who have the necessary Roles and Privileges.
- **Sharing:** Enables other Users to share the object. Needs necessary privileges.
- **Create Change:**
  - You can create a Change directly from the QCR. The change allows you to release change order to fix the problem.
  - When you create a Change from this QCR, the newly created Change is added to the Relationships tab of the QCR.
  - You can set the event trigger to move the QCR to specific status in workflow when the QCR event occurs.
- **View Workflows:** Allows you to view the current state the workflow of the QCR is in.

## Creating a Change from 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 is added to the **Relationships** tab of the QCR.

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

1. Open a QCR and in the QCR Cover page, right-click on a non-tab portion of the object window and select **Create Change** menu option.
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 the next number.
4. All affected items of QCR and PSR are listed in the **Add Affected Items to Change** table. 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 the newly created Change is added to the **Relationships** tab of QCR. The Items selected will be copied over 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. Select a Change object type from the **Subclass** 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 the next number.
4. All affected items of QCR and PSR are listed in the **Add Affected Items to Change** table. 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 **Finish**.

Agile Web Client creates the Change and the newly created Change is added to the **Relationships** tab of the QCR. The items selected will be copied over to the **Affected Items** tab of the **Change** (This allows you to separate the QCR into multiple **Changes**, each containing different Items).