

The Oracle logo, consisting of the word "ORACLE" in a bold, red, sans-serif font, is centered within a thin black rectangular border.

# **Agile Product Lifecycle Management**

Product Quality Management User Guide

v9.3.1

Part No. E16490-01

September 2010

# Oracle Copyright

*Copyright © 1995, 2010, Oracle and/or its affiliates. All rights reserved.*

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

## U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle and Java are registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services. The RMW product includes software developed by the Visigoth Software Society.

# CONTENTS

---

Oracle Copyright .....	ii
<b>Product Quality Management.....</b>	<b>1</b>
An Overview of Product Quality Management.....	1
Before you Begin.....	1
Best Practices in PQM .....	2
Product Service Requests .....	2
Problem Reports.....	2
Non-Conformance Reports.....	3
Quality Change Requests .....	3
Audits.....	3
Corrective and Preventive Actions.....	4
Tracking Quality .....	4
Tracking Quality Roles .....	4
Tracking Quality Process .....	4
Quality Related SmartRules.....	5
Quality Searches .....	6
Quality Reports .....	6
Failure Trend Report .....	7
Quality Activity Report.....	9
Quality Backlog Report.....	10
Quality Cycle Time Report .....	12
Quality Metrics Report .....	14
Quality Tracking Tabs .....	16
Viewing Quality Issues against Customers and Suppliers .....	16
<b>Working with Product Service Requests.....</b>	<b>19</b>
Creating PSRs .....	19
Creating a Product Service Request .....	19
Creating a PSR from an Item.....	20
Creating a PSR to Aggregate Multiple PSRs.....	21
Creating a PSR Using Save As.....	22
Searching for PSRs or QCRs.....	23
Cover Page Tab of a PSR .....	24
Updating the Cover Page of a PSR .....	26
Affected Items Tab of a PSR .....	27
Attributes of the Affected Items Tab of an NCR .....	29

Adding Items to the Affected Items Tab of a PSR.....	29
Removing an Item from the Affected Items Tab.....	31
Editing Items on the Affected Items Tab.....	32
Related PSR Tab.....	33
Adding Related PSRs to the Parent PSR.....	35
Editing Items on the Related PSRs Tab.....	36
Removing Related PSRs.....	37
Relationships Tab.....	37
Relationships - Table.....	38
Relationships in PQM.....	42
Attributes of a Relationship.....	42
Relationships Tab Tools.....	43
Relationships Tab Table.....	43
Adding Objects to the Relationship Tab of a PSR.....	44
Editing the Relationships Table.....	45
Removing Relationships.....	45
Relationship Rules.....	46
Adding Relationship Rules.....	46
Editing Relationship Rules.....	47
Removing Relationship Rules.....	48
Filter.....	49
Workflow Tab of a PSR.....	50
Submitting and Routing PSRs.....	51
Attachments Tab of a PSR.....	51
<b>Working with Quality Change Requests.....</b>	<b>53</b>
Creating QCRs.....	53
Creating a QCR using Save As.....	54
Creating a QCR from an Item.....	55
Creating a QCR from a PSR.....	56
Cover Page Tab of a QCR.....	57
Updating the Cover Page of a QCR.....	59
Affected Items Tab of a QCR.....	60
Relationships Tab of a QCR.....	61
Workflow Tab of a QCR.....	61
Submitting and Routing a QCR.....	63
Attachments Tab of a QCR.....	63
<b>Managing Product Service Requests.....</b>	<b>65</b>
Approving or Rejecting a Product Service Request.....	65

Closing a PSR.....66

Actions Menu in PSR .....66

Audit Status of a PSR.....67

Audit Release of a PSR .....67

**Managing QCRs ..... 69**

Approving or Rejecting Quality Change Requests .....69

Closing a QCR.....70

Actions Menu in a QCR .....70

    Change Order in a QCR.....71

**Deleting Agile Objects ..... 73**

**Notes about Deleting PSR or QCR Objects..... 73**

**Soft-Deleting an Object..... 74**

**Undeleting an Object ..... 75**

**Hard-Deleting an Object..... 75**

# Preface

Oracle's Agile PLM documentation set includes Adobe® Acrobat PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.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.

---

**Note** To read the PDF files, you must use the free Adobe Acrobat Reader version 9.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) <http://www.adobe.com>.

---

The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.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 My Oracle Support (<https://support.oracle.com>) for assistance.

---

**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.

---

## TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, 7 days a week. For TTY support, call 800.446.2398. Outside the United States, call +1.407.458.2479.

## 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/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.html>

## Agile Training Aids

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

## Accessibility of Code Examples in Documentation

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

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





# Product Quality Management

**This chapter includes the following:**

---

- An Overview of Product Quality Management..... 1
- Before you Begin ..... 1
- Best Practices in PQM..... 2
- Product Service Requests ..... 2
- Quality Change Requests..... 3
- Tracking Quality..... 4

## An Overview of Product Quality Management

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

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

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

## Before you Begin

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

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

For details about common terms appearing across all Agile PLM solutions, see *Getting Started with Agile PLM Guide*.

## Best Practices in PQM

To achieve best results while using Agile PQM, keep in mind the following:

- **Problem Reports**
  - Use Problem Reports class to capture Customer complaints.
  - Do not use PRs to capture non-conformance issues.
  - A Customer complaint may result in a CAPA in companies that have closed loop process. Use the Relationship functionality in PLM to tie the specific Customer complaint with CAPA.
- **Non-Conformance Reports**
  - Use NCR class to capture all incoming supplier issues & defects as a result of internal inspections and tests.
  - Use a sub-class of NCR to capture the non-conformances found during an Audit
  - An NCR may result in a CAPA in companies that have closed loop process. Use the Relationship functionality in PLM to tie the specific NCR with CAPA.
- **CAPA**
  - Use CAPA class to capture corrective & preventive actions.
- **Audit**
  - Use Audit class to capture details of a scheduled audit.
  - Use NCR to report results of a specific audit.
- **Affected Items**
  - The Affected Items tab comprises details of Items that have an attached PR, NCR, CAPA or Audit. It presents the Item view of Quality and informs us of which product was impacted and the failure modes involved. The Product line acquires information from the Item and not from the attached PR, NCR, CAPA or NCR.

## Product Service Requests

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

## Problem Reports

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

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

## Non-Conformance Reports

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

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

## Quality Change Requests

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

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

You can use QCRs to:

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

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

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

## Audits

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

## Corrective and Preventive Actions

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

## Tracking Quality

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

## Tracking Quality Roles

Product Quality Management provides these roles:

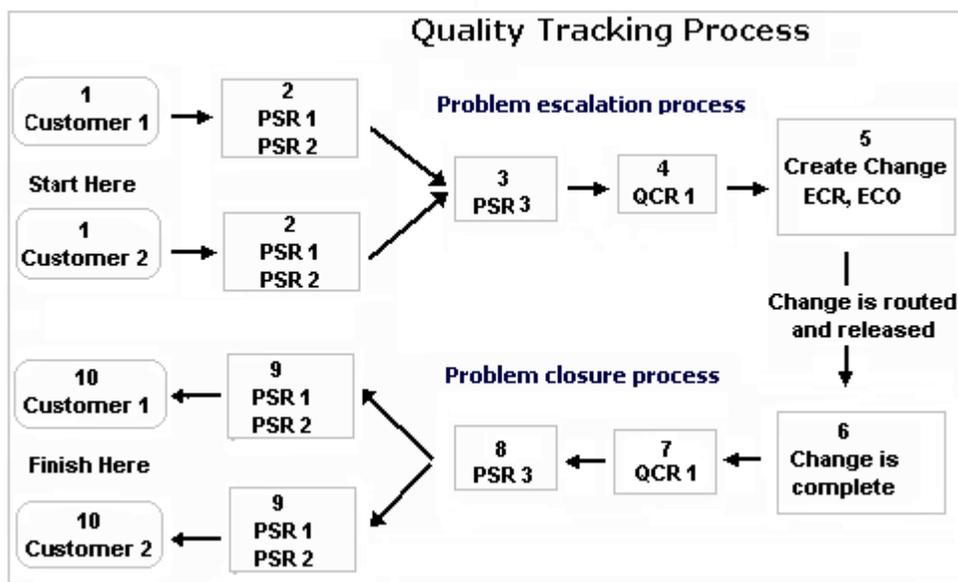
**Quality Analyst** – The role of a Quality Analyst allows you to submit Problem Reports (PRs) and Non-Conformance Reports (NCRs) and manage their resolution.

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

For details about Agile PLM roles, see *Agile PLM Administrator Guide*.

## Tracking Quality Process

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



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

## Quality Related SmartRules

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

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

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

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

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

## Quality Searches

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

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

---

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

---

## Quality Reports

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

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

- [Failure Trend Report](#) on page 7
- [Quality Activity Report](#) on page 9
- [Quality Backlog Report](#) on page 10
- [Quality Cycle Time Report](#) on page 12
- [Quality Metrics Report](#) on page 14

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

A Quality Report includes the following tabs:

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

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

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

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

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

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

## Failure Trend Report

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

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

### To run a Failure Report Trend:

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

- c. Select the **Paper Size** from the list.
  - d. Select the **Orientation** of the paper.
  - e. Click **Save** to save the changes or **Close** to close the palette.
8. Select a format for the generated report from the **Output Format** list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
  9. Select the **Save a copy of the report in the historical reports** check box to save the generated report.

---

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

---

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

---

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

---

12. Click **Next** to proceed to the next step or **Back** to edit the Query.
13. The Define Report page appears.

In the **Time Period** frame,

  - a. Click the calendar and select a **From** date.
  - b. Click the calendar and select a **To** date.
  - c. Select a **Time Unit** from the list.
14. In the **Additional Report Criteria** frame,
  - a. Select a value from the **Trend By** list.
  - b. Select the check box to display the **Product Service Requests**.
  - c. Select the check box to **Exclude Empty Columns**.
15. Click **Finish** to display the report.
16. A **Get Attachment** dialog prompts you to download the report.

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

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

**Print:** Prints the generated report.

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

## Quality Activity Report

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

### To run a Quality Activity Report:

1. In the navigation pane, navigate to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Activity Report**.

---

**Note** For details on how to run a report, see the chapter 'Working with Reports' in *Getting Started with Agile PLM Guide*.

---

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

- g. Click **Save** to save the changes or **Close** to close the palette.
10. Select a format for the generated report from the **Output Format** list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
11. Select the **Save a copy of the report in the historical reports** check box to save the generated report.

---

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

---

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

A **Get Attachment** dialog prompts you to download the report.
16. Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the **Close** button without saving it.

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

**Print:** Prints the generated report.

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

## Quality Backlog Report

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

### To run a Quality Backlog Report:

1. In the navigation pane, go to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Backlog Report**.
2. Click the **Execute** button. A Quality Backlog Report wizard opens.
3. In the Select Layout Configuration page, select a **Layout** from the list.
  - a. Click the **Edit**  button to modify an existing layout. The Default Layout palette opens. Modify required fields.
  - b. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields** column using the right arrow. Place them in the required ascending or descending order using arrows.
  - c. Click **Save** to save the changes or **Close** to close the palette.

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

---

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

---

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

appears.

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

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

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

**Print:** Prints the generated report.

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

## Quality Cycle Time Report

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

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

### To run a Quality Cycle Time Report:

1. In the navigation pane, go to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Cycle Time Report**.
2. Click **Execute**. A Quality Cycle Time Report wizard appears.
3. In the Select Layout and Configuration page, select a **Layout** from the list.
4. Click the **Edit**  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.

In the Format frame,

- a. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields** column using the right arrow. Place them in the required ascending or descending order using arrows.

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

---

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

---

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

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

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

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

**Print:** Prints the generated report.

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

## Quality Metrics Report

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

### To run a Quality Metrics Report:

1. In the navigation pane, go to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Metrics Report**.
2. Click **Execute**. The Quality Metrics Report wizard appears.
3. From the Select Layout and Configuration page, select a **Layout** from the list.
4. Click the **Edit**  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
  - a. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields** column using the right arrow. Place them in the required ascending or descending order using arrows.
  - b. Click **Save** to save the changes or **Close** to close the palette.
5. In the Properties frame,
  - a. Enter a name in the **Name** field.

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

---

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

---

11. Click **Next**.
- The Select or Create a Query page appears. The Quality Metrics Report lets you search for Product Service Requests to use in the report.
- Select the **All Product Service Requests** check box to choose from all the **PSRs**.
  - Select the **Saved Search** check box.
  - Click the **Search**  palette and choose a value from the list of Saved Searches.
  - Select the **Advanced Search** check box.
12. Click **Define Query**. A Report Search palette opens.
- a. Choose from the list or enter the necessary details to define the query.
  - b. Click **Clear** to clear the selection, **Finish** to continue and **Close** to close the palette.
13. Click **Next** to proceed to the next step or **Back** to edit the Query. The Define Reports page appears.
14. In the **Time Period** frame,
- a. Use the calendar to select a **From** date.

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

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

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

**Print:** Prints the generated report.

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

## Quality Tracking Tabs

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

- The Quality tab for items displays all PSRs reported against that item.
- The PSRs tab of a Customer object lists all quality incidents reported by the customer. This 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.

## Viewing Quality Issues against Customers and Suppliers

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

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

and Supplier details

- **Search Personalization** - Format a search and choose the required View by using the Personalize menu. For example, View all the QCRs/PSRs for Customers and Suppliers in displayed fields.



# Working with Product Service Requests

This chapter includes:

- [Creating Product Service Requests](#) on page 19
- [Cover Page tab of a PSR](#) on page 24
- [Affected Items tab of a PSR](#) on page 27
- [Related PSR tab](#) on page 33
- [Relationships tab](#) on page 37
- [Workflow tab of a PSR](#) on page 49
- [Attachments tab of a PSR](#) on page 51
- [Submitting and Routing PSRs](#) on page 51

## Creating PSRs

Creating Product Service Requests (PSR) depends on the quality of the incidents. They can either report a single quality incident or multiple incidents with a single PSR. It is mandatory that you have the necessary roles and privileges to create PSRs. For details on roles and privileges, see *Getting Started with Agile PLM Guide*.

---

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

---

## Creating a Product Service Request

The **Create New** feature on the Home page allows you to create a PSR.

### To create a PSR in Java Client:

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

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

For more information about the cover page, see [Cover Page tab of a PSR](#)

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

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

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

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

### To assign a workflow to the PSR:

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

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

## Creating a PSR from an Item

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

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

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

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

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

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

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

1. Open the **Item** from which you want to create a **PSR**.

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

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

## Creating a PSR to Aggregate Multiple PSRs

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

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

---

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

---

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

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

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

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

1. Open a **PSR** you want to use as the basis for a new **PSR** or choose **Actions > Save As**. The Save As page appears.
2. The **PSR** opens with the Cover Page in the edit mode. On the **Affected Items** tab, do not add any items. On the **Related PSR** tab, add related **PSRs**.
3. Click **Add** to add related **PSRs**. You can also use the combination **Ctrl + I** keys to launch the search field.
  - a. Enter a value and click the **Search to add** button  to launch a search palette.
  - b. Click the **Create to add** button  to create new **PSRs**.

After you add related **PSRs**, the **Aggregate PSR Number** column of every **PSR** displays the number of the parent **PSR**. The **Cover Page** of the child **PSRs** displays the parent **PSR** number automatically.

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

## Creating a PSR Using Save As

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

### To create a PSR using save as in Java Client:

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

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

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

### To create a PSR using save as in Web Client:

1. Open a **PSR** you want to use as the basis for a new **PSR**.
2. Choose **Actions >Save As**. The **Save As** dialog appears.
3. Select the required sub-class (NCR or Problem Report) from the **Type** list.
4. In the **PSR Number** field, accept the default number, enter a number, or click  **Autonumber** button to generate a new number.
5. If the original **PSR** contains Attachments, then a frame displays the following options:

- Reference existing files — creates a new reference to the existing file folder on the new PSR's Attachments tab.
  - Create new copies of files — creates a new copy of the attachment, and places it in a newly created file folder.
  - Do not include files — creates a new **PSR** without any attachments.
6. Click **Save**. The new **PSR** opens displaying the **Cover Page** in the edit mode.
  7. Enter values in relevant fields on the **Cover Page** tab.
  8. Click **Save** to save the changes.

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

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

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

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

## Searching for PSRs or QCRs

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

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

### To run a quick search:

1. Select an object and enter a wildcard (\*).

- Click the **Execute a Quick Search** button. The Search results return a list of objects.

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

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

## Cover Page Tab of a PSR

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

Fields	Completed	Indicates
<b>PSR Number</b>	Usually, automatically, when you create it. <b>Note</b> If you set 'Autogenerate' to 'Yes' in the Java Client, then the number is generated automatically. If not you have to enter the PSR number manually.	The number assigned to the PSR when you create it. For Problem Reports, the number is pre-fixed with PR. For Non-Conformance Reports, it is pre-fixed with NCR.
<b>PSR Type</b>	Automatically, when you create it.	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	List of severities defined by the Agile PLM Administrator.
<b>Disposition</b>	Manually	List of dispositions defined by the Agile PLM Administrator. The Disposition field displays a code that represents the way in which you resolve a PSR. Examples of dispositions are Replace Component and Rework to Spec.
<b>Expected Resolution Date</b>	Manually	Date when you expect to resolve the PSR.

<b>Fields</b>	<b>Completed</b>	<b>Indicates</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.	<p>The default Quality Analyst.</p> <p>If you define the workflow to notify the default Quality Analyst, the department or user in this field receives notifications about the PSR. If this field is blank, then the notifications are sent to every quality analyst on the list.</p> <p>If the workflow is at the Pending status and has a Quality Analyst defined then that user receives notification.</p> <p>If the notification definition in the workflow is blank, then no notifications are sent.</p>
<b>Workflow</b>	<p>If more than one workflow applies to the PSR, the workflow is selected manually; you can change the workflow as long as the PSR is in the Pending status.</p> <p>You cannot move the PSR to the next status from the Unassigned state without assigning a workflow.</p>	The name of the workflow used to move this PSR through the quality tracking process.
<b>Status</b>	Automatically, when created	The current workflow state of the PSR. If you do not select a workflow, the status remains Unassigned.
<b>Originator</b>	Automatically, when created.	The default creator of the PSR. Also contains a list of other problem report originators.
<b>Date Originated</b>	Usually automatically, when created.	The date you create the PSR.
<b>Date Submitted</b>	Automatically generated based on workflow status.	The date when the PSR moves to the Submitted status in the workflow.
<b>Date Released</b>	Automatically generated based on workflow status.	The date when the PSR moves to the Released status in the workflow.
<b>Final Complete Date</b>	Automatically generated based on workflow status.	The date when the PSR moves to the Complete status in the workflow.
<b>Aggregate PSR Number</b>	Automatically filled in when you add PSRs to the Related PSR tab.	Automatically fills the parent PSR number.
<b>Product Lines</b>	Manually	The product lines this PSR affects.

## Updating the Cover Page of a PSR

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

### To edit the cover page of a PSR in Java client:

1. Open a **PSR**. The **PSR** number and the **PSR** type fields are pre-populated.
2. Select a value from the list in the **Category** field.
3. Enter text in the **Description** field.
4. Click the link to search for **Customers**.
5. A Select Objects dialog appears. Enter \* and click the **Search** button.
6. From the Search results list, select an object and move it to the Selected Objects column using the arrow.
7. Click **OK**.

Alternatively,

- Click the Saved Searches tab and search in the available folders.
  - Click the shortcuts tab and search in Recently Visited folder and the Bookmark folder.
  - Click the **Advanced Search** link.
    - a. In the Advanced Search dialog, select the Create New or Use a Saved Search option.
    - b. Choose from lists or enter text as required.
    - c. Click **Run** to run the search, Click **Save** to save the changes, click **More** for additional criteria and click **Close** to close the dialog.
    - d. Click **OK** to save the changes or **Cancel** to return to the Cover Page.
8. Choose **Severity** of the **PSR** from the list.
  9. Choose a **Disposition** from the list.
  10. Use the calendar  and select an **Expected Resolution Date**.
  11. Click **Save** to save the changes.

The **Cover Page** displays modified values.

### To edit the cover page of a PSR in Web Client:

1. Open a **PSR** and click the **Edit** button to modify it.
2. The **PSR number** and **PSR Type** number fields are automatically populated.
3. Select a value from the list in the **Category** field.
4. Enter text in the **Description** field.
5. To search for **Customers** and **Suppliers**, you can either:
  - Click the  **Search** button adjacent to the Customer/Supplier field to launch a search palette and search for existing Customers or Suppliers.

- Click the  button to create new Customers or Suppliers.

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

**To search for existing customers or Suppliers:**

- Click the  button adjacent to the Customer/Supplier field to launch a search palette to search for existing Customers or Suppliers. You can also use the combination **Ctrl + L** keys to launch the search field.
  - Enter a known value or type \* and click the **Execute a Quick Search**  button.
  - Select a **Customer** or **Supplier** from the list that appears. To move the **Customer** or **Supplier** to the **Cover Page** field, either:
    - Drag and drop it.
    - Double-click the object.
    - Press Enter.
- a. Click the **Close**  button to close the palette.

**To create new customers:**

- b. Click the  button to create new Customers or Suppliers.
- c. A Create New dialog appears. In the **Type** field, select a **Customer** from the list.
- d. In the **Number** field, enter a number or click  **Autonumber** button.
- e. Enter **Customer Name**.
- f. Click **Save**.
6. Choose **Severity** of the **PSR** from the list.
7. Choose a **Disposition** from the list.
8. Click the calendar  to select a resolution date. You can also use the combination **Ctrl + L** keys to launch the calendar.
9. Choose a **Workflow** from the list. Updates of the workflow status are automatic as the **PSR** moves to the next status.
10. The **Originator** and **Quality Analyst** fields are pre-defined.
11. Click the  palette and choose one or more **Product Lines** that this **PSR** affects. You can also use the combination **Ctrl + L** keys.
12. Click **Save** to save changes.

The **Cover Page** displays modified values.

## Affected Items Tab of a PSR

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

---

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

---

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

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

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

Field	Completed	Indicates
<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>f the affected Item in which you find the problem of the Affected Item. For example, if the item has undergone five revisions, and you identify the defect in revision B, then <b>Rev found</b> displays B.</p> <p>In Web Client, when you select an item to add, all the revisions of the item appear in the drop-down list. The latest revision displays by default.</p> <p><b>Note</b> You can add multiple copies of an item at the same revision to the Affected Items tab.</p>
<b>Affected Site</b>	Automatically, when created.	The site at which the affected items are having problems.
<b>Failure Mode</b>	Manually	<p>Displays the reason a product failed or did not meet customer requirements. Select the failure mode from a list defined by the Agile Administrator. You can define a list of failure modes for each subclass of an item.</p> <p>For example, a failure mode for a battery might be No Charge, and the failure mode of a power strip might be Blown Fuse.</p>
<b>Quantity affected</b>	Manually	The number of Items affected by the quality incident.
<b>Rev Fixed</b>	Automatically. When you fix the problem in the revision. You can also change it manually.	The revision of the Item in which the problem is fixed. You can update this field manually or it is populated automatically when you release the ECO.

---

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

---

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

## Attributes of the Affected Items Tab of an NCR

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

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

Field	Completed	Indicates
<b>Conformance Specification</b>	Manually	Conformance specification information of the material.
<b>Serial/Lot Number</b>	Manually	Serial number or Lot number of the items of the batch that was defective (this is similar to the unique identifier for the batch of goods).
<b>Total Quantity Suspect</b>	Manually	Total Quantity suspected of problems.  For example, you receive a lot of 500 units, inspect 20 units and find that 5 are defective:  500 total suspect; 20 checked; 5 affected
<b>Quantity Checked</b>	Manually	The number of inspected items.
<b>Quantity Affected</b>	Manually	The actual number of items affected with problems.
<b>Containment Actions</b>	Manually	Containment actions taken to dispose material.
<b>RMA Number</b>	Manually	Return Merchandise Authorization. The number from the supplier that authorizes you to return defective materials.
<b>Conforming Material Date</b>	Manually	The date when the supplier expects to send materials which conform to specifications.

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

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

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

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

search for known items.

**To create items:**

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

The **Item** appears on the **Affected Items** table.

**To search for existing Items:**

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

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

**To type in known numbers:**

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

---

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

---

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

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

**To search for existing items:**

1. Click the **Search to add**  button to launch the search palette. You can also use the combination keys **Ctrl + I** to launch the search field.
2. Enter the value or \* to search for and click the **Execute a Quick Search**  button.

3. Select an **Item** from the list that appears. To move it to the **Affected Items** table, you can either:
  - Drag and drop it.
  - Double-click the object.
  - Press Enter.
4. Click the **Close**  button to close the palette.  
The **Item** appears on the **Affected Items** table.

#### To create items:

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

#### To copy and paste objects:

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

The **Item** appears on the **Affected Items** table.

---

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

---

## Removing an Item from the Affected Items Tab

#### To remove an item from the affected items tab in Java Client:

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

#### To remove an item from the affected items tab in the Web Client:

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

3. Click **Remove**.

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

## Editing Items on the Affected Items Tab

You can edit items on the **Affected Items** tab several times if necessary, as long as they are *not* in the **Released** state. You can edit the fields to include additional information or modify existing information.

### To edit the items on the Affected Items tab in the Java Client:

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

Alternately, double-click the cell, edit the content and press Enter

6. When you finish editing, click **OK**.

For more details on the fields see, the [Affected Items tab of a PSR](#) on page 27.

---

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

---

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

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

### To edit the items on the Affected Items tab in the Web Client:

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

---

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

---

## Related PSR Tab

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

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

The **Related PSR** tab includes the following columns by default. The table below lists and describes the columns.

Field	Completes	Indicates
<b>PSR Criteria Met</b>	Automatically, when you meet the PSR Event criteria.	Indicates when the PSR event occurred (that is, the parent PSR has reached the status selected for the PSR event).  Once the parent PSR attains the status specified in the PSR Event field, then the related PSR status automatically moves to the status specified in the PSR Result field and completes the criteria specified.
<b>Event</b>	Manually	The status of the parent PSR that triggers an automated workflow event.  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.  The default value of the PSR Event is set to the Closed status. If you have Quality Analyst privileges, you can set the default value to another status in Java Client.  <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.
<b>Result</b>	Manually	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.  When the parent PSR reaches the status in the PSR Event field, then the status of the related PSR is automatically moved to the specified result status in this field.  The default value of the PSR Result is set to the Closed status. If you have Quality Analyst privileges, you can set the default value to another status in Java Client.  <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.
<b>PSR Type</b>	Automatically	The type of the PSR

<b>Field</b>	<b>Completes</b>	<b>Indicates</b>
<b>PSR Number</b>	Manually; when you enter the PSR number	The related PSR number.
<b>PSR Category</b>	Automatically	The quality incident category of the related PSR.
<b>PSR Customer</b>	Automatically	The customers associated with the related PSR.
<b>PSR Supplier</b>	Automatically	The suppliers associated with the related PSR.
<b>PSR Severity</b>	Automatically	The severity of the related PSR. The Agile PLM administrator defines the severities.
<b>PSR Disposition</b>	Automatically	The way the PSR was resolved.
<b>PSR Expected Resolution Date</b>	Automatically	The date you expect the resolution for the related PSR.
<b>PSR Quality Analyst</b>	Automatically	The quality analyst assigned to the related PSR. If you define the workflow to notify the default quality analyst, the department user in this field receives notifications about the PSR
<b>PSR Workflow</b>	Automatically	The name of the workflow used to move this PSR through the quality tracking process.
<b>PSR Status</b>	Automatically	The workflow status of the related PSR. If you do not select a workflow, 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 when you create the related PSR.
<b>PSR Date Submitted</b>	Usually automatically, when created	The date when you submit the related PSR.
<b>PSR Date Released</b>	Usually automatically, when created	The date when you release the related PSR.
<b>PSR Final Complete Date</b>	Usually automatically, when created	The date when you complete the related PSR
<b>Aggregate PSR Number</b>	Automatically filled in when PSRs are added to the Related PSR tab.	Field filled in automatically with the parent PSR number.

---

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

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

---

## Adding Related PSRs to the Parent PSR

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

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

### To create objects:

1. Click the **Create** button. A **New** dialog appears.
2. Select a type from the **Type** list.
3. Enter an object number or click the **Autonumber**  to generate a new number.
4. Click **OK**.

The object appears in the **Related PSRs** table.

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

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

The object appears in the **Related PSRs** table.

---

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

---

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

1. Open a **PSR** and click the **Related PSR** tab.
2. In the **Related PSR** table, click **Add**.

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

#### To search for existing objects:

1. Click the **Search to Add**  button to launch a palette to search for existing **PSRs**. Use the combination **Ctrl + I** keys to launch the search field.
2. Enter the value or type \* and click the **Execute a Quick Search**  button.
3. Select a **PSR** from the list that appears. To move it to the **Related PSR** table and either:
  - Drag and drop it.
  - Double-click the object.
  - Press Enter.
4. Click the **Close**  button to close the palette.  
The object appears on the **Related PSR** table.

#### To create new objects:

1. Click the **Create to Add**  button to create new **PSRs**.
2. A Create New dialog appears. In the **Type** field, select an object from the list.
3. In the **Number** field, enter a number or click the **Autonumber**  button.
4. Enter details in the **Description** field.
5. Click **Add** to add the object to the table or click **Cancel** to return to the **Related PSR** table.  
The object appears on the **Related PSR** table.

## Editing Items on the Related PSRs Tab

You can edit the information in the fields of the **Related PSRs** tab to include additional information or modify existing values.

#### To edit related PSRs in Java Client:

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

**To edit related PSRs in Web Client:**

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

---

**Note** If a cell does not open, a message displays that the field is not editable.

---

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

---

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

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

---

## Removing Related PSRs

**To remove related PSRs in Java Client:**

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

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

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

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

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

---

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

---

## Relationships Tab

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

Relationships tab of Agile objects have the option to specify a rule between the objects. When you

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

## Relationships - Table

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

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

In the Relationship with a Rule column:

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

**No** – Indicates that it does not support the functionality.

In the Event/Result column:

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

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

Agile Base Class	Agile Classes	Event/ Result	Relationship with a Rule	References- Relationship with no rule	Lifecycle under Change Control
<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
	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	Exists	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
	JGP SSI Declarations	Workflow	Exists	Exists	NA
	Part Declarations	Workflow	Exists	Exists	NA
	Substance Declarations	Workflow	Exists	Exists	NA
	Supplier Declaration of Conformance	Workflow	Exists	Exists	NA
<b>File</b>	File Folder	Lifecycle	Yes	Exists	No

Agile Base Class	Agile Classes	Event/ Result	Relationship with a Rule	References- Relationship with no rule	Lifecycle under Change Control
<b>Folders</b>					
<b>Items</b>	Documents	Lifecycle	Yes	Yes	NA
	Parts	Lifecycle	Yes	Yes	NA
<b>Manufacturer Parts</b>	Manufacturer Parts	Lifecycle	Yes	Yes	NA
<b>Manufacturer</b>	Manufacturer	Lifecycle	Yes	Yes	No
<b>Packages</b>	Packages	Workflow	Yes	Yes	
<b>Part Groups</b>	Part Groups	Lifecycle	Yes	Yes	No
<b>Prices</b>	Published Process	Lifecycle	Yes	Yes	Yes
	Quote Histories	Lifecycle	Yes	Exists	Yes
<b>PSRs</b>	Non Conformance Reports	Workflow	Exists	Exists	NA
	Problem Reports	Workflow	Exists	Exists	NA
<b>Programs</b>	Activities	Workflow	Exists	Exists	NA
	Gate	Workflow	Exists	Exists	NA
<b>QCRs</b>	Audit	Workflow	Exists	Exists	NA
	CAPA	Workflow	Exists	Exists	NA
<b>Requests for Quotes</b>	Requests for Quotes	Lifecycle	Yes	Yes	No
<b>RFQ Response</b>	RFQ Response	Lifecycle	Yes	Yes	No
<b>Sites</b>	Sites	Lifecycle	Yes	Yes	No
<b>Sourcing Projects</b>	Sourcing Projects	Lifecycle	Yes	Yes	No

<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>Lifecycle under Change Control</b>
<b>Specifications</b>	Specifications	Lifecycle	Yes	Yes	No
<b>Substances</b>	Materials	Lifecycle	Yes	Yes	No
	Sub Parts	Lifecycle	Yes	Yes	No
	Substances	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	Status Attribute	No	Yes	NA
<b>Action Items</b>	Action Items	Status Attribute	No	No	NA
<b>Discussions</b>	Discussions	None	No	Yes	NA
<b>Reports</b>	Custom Reports	None	No	No	NA
	External Reports	None	No	No	NA
	Standard Reports	None	No	No	NA

## Relationships in PQM

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

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

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

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

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

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

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

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

## Attributes of a Relationship

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

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

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

## Relationships Tab Tools

The **Relationships** tab has the following buttons:

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

The Relationships tab page includes the **Views** and **Personalize** buttons. The **Personalize** menu enables you to create and customize **Views**. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views. For details on **Views**, see chapter 'Navigating in Agile Web Client' in *Getting Started with Agile PLM Guide*.

See also: [Relationships Table](#) on page 43

## Relationships Tab Table

The Relationships table lists the following columns by default:

Field	Completed	Indicates
<b>Criteria Met</b>	Automatically. When you meet relationship rule of the objects added.	Indicates when the added object attains the specified status. Once you meet the criteria, you see the symbol  in the Web Client and  in the Java Client.
<b>Type (Image)</b>	Automatically	The type (image) of the object you add.
<b>Name</b>	Automatically	The name of the object
<b>Description</b>	Automatically	The description of the object you add with the number. For example, (PR00054).
<b>Current Status</b>	Automatically when you add the object.	The current status of the related object.
<b>Rule</b>	Automatically when you add the rule	Displays the rule specified. <b>Note</b> You can specify <b>Rule</b> only if you assign a workflow to the PSR.
<b>Type</b>	Automatically	The type of the added object. (For example, Problem Report)

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

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

---

## Adding Objects to the Relationship Tab of a PSR

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

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

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

### To create objects:

1. Click the **Create** button. A **New** dialog appears.
2. Select a sub-class from the **Type** list.
3. Enter a number or click the **Autonumber**  button.
4. Click **OK**.

The object appears on the **Relationships** tab.

### To search for existing objects:

1. In the **Add Relationship** dialog box, select a search method.
2. To perform a simple search, enter value to search for and click **Search**. You can also define an **Advanced Search**, run a **Saved Search**, select a **Bookmarked** object, or select from the **Recently Visited** folder (Shortcuts).
3. Select the items from the **Search Results**. These can be **PSRs**, **QCRs**, or **Changes**. Use the right arrow or double-click the selected object to move it to the **Selected Related Objects** column.
4. To select different revisions of items or edit other fields, ensure to select the **Edit rows after adding** check box.
5. Click **OK**.

The selected object appears on the **Relationships** table.

### To add a relationship or reference to an object in Web Client:

1. Go to the **Relationships** tab of the object.
2. Use one of these options to add a row to the **Relationships** table:
3. Click the **Add** menu button and choose one of the following options:
  - Choose **By Search** to open the search palette. Execute a quick search to find the objects you want. Double-click to add an object. Press **Escape** to close the palette.
  - Choose **By Create** to create a new object. Select an object type, fill in any required fields,

and then click **Add**. The newly created object is added to the table.

4. Drag and Drop
  - Select an object in the left navigation pane. Drag it onto the table and drop it. You can drag and drop from your  **My Bookmarks**,  **Recently Visited** list, and the  **NAVIGATOR** drawer.
5. Copy and Paste
  - Copy one or more objects from a table: search results table, BOM table, Where Used table, and so forth. Use **More > Copy** or Ctrl-C to copy the rows.
  - Open the object to which you want to add a relationship. Click the Relationships tab to display it. Paste the rows by using **More > Paste** or Ctrl-V.

You can add Problem Reports or a Non-Conformance Reports to the **Relationships** tab of any other Agile objects.

## Editing the Relationships Table

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

### To edit the relationships table in Java Client:

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

The modified values appear on the table.

### To edit the relationships table in Web Client:

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

The modified values appear on the table.

## Removing Relationships

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

### To remove relationship in Java Client:

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

The object does not appear on the **Relationships** table.

**To remove relationship in Web Client:**

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

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

## Relationship Rules

The **Relationship** rule specifies how the workflow you define for an object affects the workflow status of another object. For example, When PR0048 is **Submitted**, Set PR0049 to **Review**.

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

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

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

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

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

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

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

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

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

## Adding Relationship Rules

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

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

To access more information about this object, click the **Quick View** info link. This appears when you

position the cursor on the corresponding object and allows you to view details of the object and perform some actions without navigating to the actual object.

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

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

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

For example:

**When PR0002 is Review**  
**Set PR123304 to Submitted.**

5. Click **OK**.

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

#### To add a relationship rule in Web Client:

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

For example,

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

6. Click **Save**.

The rule appears on the message bar.

7. Click the **Close**  button to close the palette.

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

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

## Editing Relationship Rules

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

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

1. Open a **PSR** and click the **Relationships** tab.

2. Select a row on the **Relationships** table you want to edit.
3. Click the **Edit Rule**  button.
4. In the **Relationships Rule** dialog, modify the rule.
5. Click **OK**.

The modified rule displays on the **Relationships** table.

#### **To edit the relationship rule in the Web Client:**

1. Open a **PSR** and click the **Relationships** tab.
2. You can either:

Click the **Edit Rule** button.

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

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

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

3. Click the **Close**  button to close the palette.

The modified rule displays on the **Relationships** table.

## **Removing Relationship Rules**

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

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

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

The rule does not appear in the **Rule** column.

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

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

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

The rule does not appear in the **Rule** column.

## Filter

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

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

**All Relationships** - This filter allows you to filter all the relationship objects in the table.

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

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

**Rule not specified** - This filter allows you to filter objects for which there are no rules specified.

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

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

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

Additional attributes listed below help filter relationships further.

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

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

## Workflow Tab of a PSR

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

The **Workflow** tab page displays two sections:

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

Colors represent the status of the workflows:

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

The Sign-Off History table displays past workflow and sign-off information for the **PSR**. For example, you can route a **PSR**:

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

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

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



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

The **Next Status** button on the Cover page also allows you in switching the routable object to any of the permissible order of statuses listed in the drop-down menu.

- **Hold** and **Cancel** are additional statuses you find on the PSR.

The general route of a business object (PSR) is as given below:

**Unassigned> Pending> Submitted> Review> Released>Closed.**

**Hold** and **Cancel** statuses are indicated on the Workflow chart or on the **Next Status** drop down

menu only after the PSR reaches the **Submitted** status.

- You can have multiple **Hold** statuses with unique names. Naming indicates the purpose of the **Hold** status.
- A **Hold** or **Cancel** status will display only when available as a Manual Valid Next Status

For details, see chapter 'Multiple Hold and Cancel Status' in *Getting Started with Agile PLM Guide*.

## Submitting and Routing PSRs

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

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

## Attachments Tab of a PSR

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

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

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

**Attachments** tab actions allow you to add, remove, open, view or get a copy of the attachment file. The View drop down button allows you to view, Compare, Compare by Search and Overlay. You can also check in and check out attachments (although you are actually checking file folder objects in and out) or even cancel the checkout. The **More** drop-down button actions allow you to perform the following:

- Get Shortcut
- View Versions
- Print
- Copy
- Paste

The Fill-Up and Fill-Down options allow you to copy value from a cell to corresponding cells either in the preceding or following cells of the selection. The Fill-Up option copies the value in the last cell to selected cells and Fill-Down options copies the value in the first cell to all selected cells.

---

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

---

# Working with Quality Change Requests

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

This chapter includes the following topics:

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

## Creating QCRs

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

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

### To create a QCR in Java Client:

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

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

### To create a QCR in Web Client:

1. Launch Agile Web Client.
2. From the main toolbar, click the **Create New** drop-down button. Select **Quality Change Request > Audit** or **Corrective and Preventive Actions**. The **Create New** dialog appears.

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

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

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

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

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

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

---

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

---

## **Creating a QCR using Save As**

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

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

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

#### **To create a QCR using save as in Java Client:**

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

**To create a QCR using save as in Web Client:**

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

---

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

---

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

## Creating a QCR from an Item

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

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

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

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

1. Open an existing an **Item**.
  2. Right-click in the object window and choose **Create a Quality Change Request** from the drop-down menu.
  3. Select the required sub-class Audit or CAPA from the **Type** list.
  4. In the **QCR Number** field, accept the number that appears, enter a number or click the **Autonumber**  button to generate a number.
  5. Click **OK**.
- Agile Java Client creates the **QCR** and displays it with the **Cover Page** in the edit mode.

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

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

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

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

## Creating a QCR from a PSR

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

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

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

The **QCR** opens in the edit mode.

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

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

6. Click **Save**.

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

## Cover Page Tab of a QCR

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

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

Field	Completed	Indicates
<b>Quality Administrator</b>	Select from a list. In the list, Departments appear first, followed by individual user names.	<p>The default Quality Administrator.</p> <p><b>Note</b> If you prefer another QA over default QA, the system displays a message "Quality Administrator selected is not one of the defaults. The default Quality Administrator list includes: Default QA UserName (Userid), "</p> <p>If you define the workflow to notify the default quality administrator, the user groups or user in this field receives notifications about the QCR. If this field is blank, the system notifies to all the quality administrators on the list. If the notification definition in the workflow is blank, no notifications are sent.</p>
<b>Status</b>	Automatically, when created. Updates as the QCR moves through the assigned workflows.	Workflow status. If you do not select a workflow this field displays the <b>Unassigned</b> status.
<b>Originator</b>	Usually automatically, when created (with the default set by the Agile PLM Administrator).	The originator or creator of the QCR.
<b>Date Originated</b>	Usually automatically, when created.	The date you create the QCR
<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 moves to the Complete status type.
<b>Preventive Action</b>	Usually manually; can contain a default. 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).	A pro-active action taken to prevent the problem from happening again. Applies only to CAPAs.
<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. Applies only to CAPAs.

Field	Completed	Indicates
<b>Planned Audit Date</b>	Manually	Date planned to audit the problem.
<b>Audit Result</b>	Usually manually, can contain a default.  For example, when you implement a CAPA, the Quality Analyst performs an Audit to ensure the CAPA actually solves the problem. If the fix for the problem is validated, then the result is pass. Otherwise it fails, and the Quality Analyst updates the <b>Audit Result</b> field.	Audit process result. The default setting for the audit result is Pass/Fail. For more details, on other settings contact the Agile Administrator.
<b>Product Lines</b>	Usually manually; can contain a default.	List of product lines defined by the Agile Administrator.

## Updating the Cover Page of a QCR

After you create a **QCR**, you can modify it to provide additional information or edit any information that has changed since its creation.

### To update the cover page of a QCR (Java Client and Web Client):

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

---

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

---

The **Cover Page** displays updates of the **QCR**.

## Affected Items Tab of a QCR

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

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

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

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

---

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

---

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

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

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

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

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

## Relationships Tab of a QCR

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

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

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

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

The **Relationships** tab of a **QCR** is similar to that of a **PSR**. See also: [Relationships tab](#) on page 37.

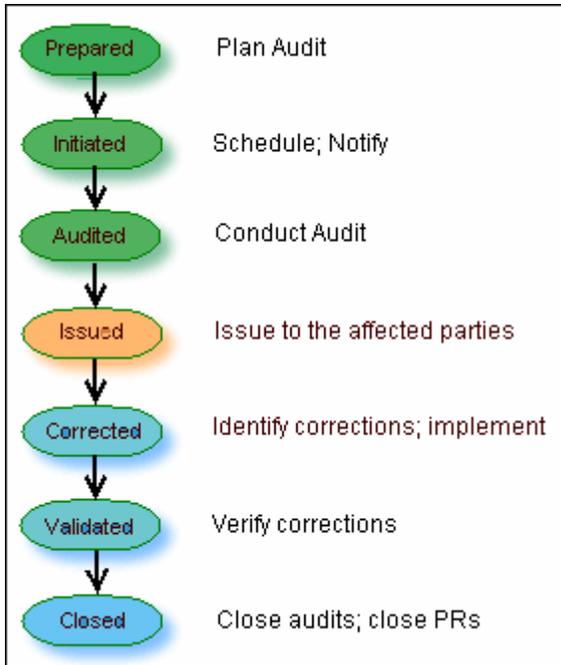
## Workflow Tab of a QCR

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

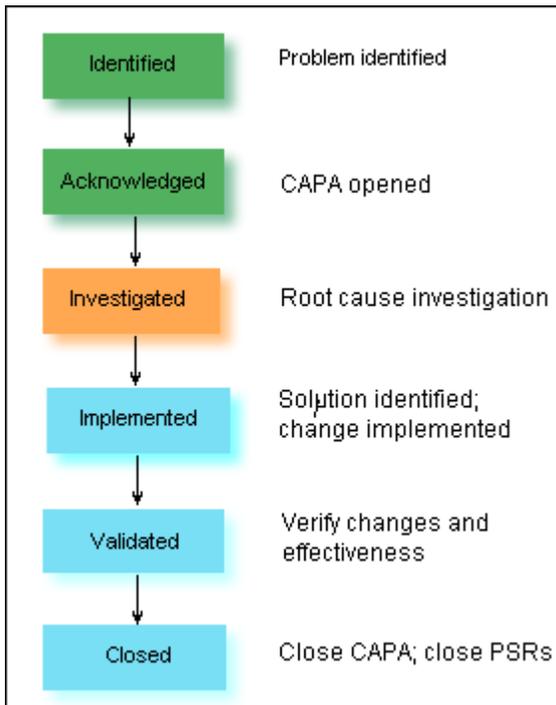
The **Workflow** tab page includes the **Views** and **Personalize** buttons. For details on **Views** and **Personalize** menus, see *Getting Started with Agile PLM Guide*.

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

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



The table below represents the status of a default CAPA.



The **Next Status** button on the Cover page also allows you in switching the routable object to any of the permissible order of statuses listed in the drop-down menu.

The general route for an **Audit** is as follows:

**Prepared > Initiated > Audited > Issued > Corrected > Validated > Closed.**

**Audit - Hold** and **Cancel** statuses are indicated on the Workflow chart or on the **Next Status** drop down menu after it reaches the **Initiated** status.

The general route for an **Audit** is as follows:

**Identified > Acknowledged > Investigated > Implemented > Validated > Closed.**

**CAPA** - For a **CAPA**, the **Cancel** status applies to the **Identified** status. The **Hold** status applies only from the **Acknowledged** status.

## Submitting and Routing a QCR

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

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

## Attachments Tab of a QCR

You can reference files and attachments from the **Attachments** tab of a **QCR**. The **Attachments** tab of a **QCR** is similar to that of the **PSR**. For details, see [Attachments tab of a PSR](#) on page 51.



# Managing Product Service Requests

This chapter includes the following:

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

This chapter includes the following topics:

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

## Approving or Rejecting a Product Service Request

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

**To approve a PSR:**

1. Open a **PSR**. (Ensure that it is in the **Review** or **Released** status).
2. Click the **Approve** button above the tabs. The **Approve to Review** dialog appears. Notice that the **User** field is pre-populated.
3. Enter **Password** if applicable.

---

**Note** The **Password** field appears in the **Approve/Reject** window depending on the **Password Required** property setting for the current workflow status. For more information about workflow properties, see *Agile PLM Administrator Guide*.

---

4. Select the **Quality Analyst** and **Originator** you want to notify.
5. Use the palette to add **Reviewers**.
6. Add **Comments**, if any.
7. Select the **Send notification as urgent** check box to mark the notification sent out because of this action as "Urgent".
8. Click **Approve**.

9. Click **Finish**.

**To reject a PSR:**

1. Open a **PSR**. (Ensure that it is in the **Review** or **Released** status).
2. Click the **Reject** button located above the tabs. The Reject for Review dialog appears.
3. Enter **Password** if applicable.

---

**Note** The **Password** field appears in the **Approve/Reject** window depending on the **Password Required** property setting for the current workflow status. For more information about workflow properties, see *Agile PLM Administrator Guide*.

---

4. Select the **Quality Analyst** and the **Originator** you want to notify.
5. Use the palette to add **Reviewers**.
6. Add **Comments**, if any.
7. Select the **Send notification as urgent** check box to mark the notification sent out as a result of this action as "Urgent".
8. Click the **Reject** button.
9. Click **Finish**.

## Closing a PSR

**To close or promote a PSR to the complete status:**

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

## Actions Menu in PSR

The **Actions** menu lists actions that you can perform on the **PSR**.

Actions	Implications
<b>Bookmark</b>	Saves <b>PSR</b> as a Bookmark for future retrieval.
<b>Subscribe</b>	Subscriptions notify you of changes or actions you need to take.
<b>Save As</b>	Creates and saves a copy of the current <b>PSR</b> in the same or a different subclass.
<b>Delete</b>	Deletes <b>PSR</b> .
<b>Send</b>	Sends <b>PSR</b> to users who have the necessary Roles and Privileges.
<b>Sharing</b>	Allows users to grant other users privilege access equivalent to his.
<b>Copy URL to Clipboard</b>	Copies the URL of the object to the clipboard, so that you can paste it elsewhere.

Actions	Implications
<b>Audit Status</b>	Audits the status of an object to check if the workflow can progress further.
<b>Audit Release</b>	Audits if you can release the object with the existing workflow status.
<b>View Workflows</b>	Allows you to view the workflow states of the <b>PSR</b> .
<b>Print</b>	Prints <b>PSR</b> .
<b>Export</b>	Exports <b>PSR</b> to a delimited text file (CSV), Microsoft Excel, or an XML file.
<b>Create Quality Change Requests</b>	Allows you to create Quality Change Requests on the <b>PSR</b> .

## Audit Status of a PSR

The **Audit** button allows you to audit the status of a **PSR**. It verifies if the workflow can move to the next state. It is performed automatically when the workflow of the **PSR** has to autopromote to the next state.

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

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

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

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

## Audit Release of a PSR

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

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

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

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

- **For the Pending, Review, Released, and Complete status:** Required fields for the current status level.

(Your Agile Administrator determines the required fields in the workflow property settings.)

- **For the Review status:** Checks approval of all Approvers.
- **For the Released status:** Checks all the current release audit rules.

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

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

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

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

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

# Managing QCRs

### This chapter includes the following:

---

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

This chapter includes the following topics:

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

## Approving or Rejecting Quality Change Requests

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

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

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

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

1. Open the **QCR** you wish to approve.
2. Click the **Approve** button. The Approve wizard appears.
3. In the **Password** field, enter your password, if applicable.

---

**Note** The **Password** field appears in the **Approve/Reject** window depending on the **Password Required** property setting for the current workflow status. For more information about workflow properties, see *Agile PLM Administrator Guide*.

---

4. Select the check boxes to notify the **Originator**, **Quality Administrator**, and **Reviewers**. You can also notify users or user groups that you have approved the **QCR**.
5. Click the **Search** palette and select the users you want to notify.
6. In the **Comments** field, enter approver comments. Comments are not mandatory. To enable **Comments**, you need to set **Comments for Approval** to **Allowed** in the Java Client.

7. Click **Approve**.

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

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

1. Open the **QCR** you wish to reject.
2. Click the **Reject** button. The Reject wizard appears.
3. In the **Password** field, enter your password, if applicable.

---

**Note** The **Password** field appears in the **Approve/Reject** window depending on the **Password Required** property setting for the current workflow status. For more information about workflow properties, see *Agile PLM Administrator Guide*.

---

4. Select the check boxes to notify the **Originator**, **Quality Analyst**, and **Reviewers**.
5. Click the **Search** palette to select users you want to notify.
6. In the **Comments** field, enter Approver comments. Comments are not mandatory. You need to set **Comments for Rejection** to **Allowed** in the Java Client.

For details, see chapter 'Workflow' in *Agile PLM Administrator Guide*.

7. Click the **Reject** button.

## Closing a QCR

**To close or promote a QCR to the Complete status:**

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

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

## Actions Menu in a QCR

The **Actions Menu** lists actions you can perform on the **QCR**.

Actions	Implications
<b>Bookmark</b>	Saves the <b>QCR</b> as a Bookmark for future retrieval.
<b>Subscribe</b>	Subscriptions notify you of changes or actions you need to take.
<b>Save As</b>	Creates and saves a copy of the current object in the same or a different subclass.
<b>Delete</b>	Deletes the <b>QCR</b> .
<b>Copy URL to Clipboard</b>	Copies the URL of the object to the clipboard, so that you can paste it elsewhere.

Actions	Implications
<b>Send</b>	Sends <b>QCR</b> to users who have necessary Roles and Privileges.
<b>Sharing</b>	Allows users to grant other users privilege access equivalent to his.
<b>Audit Status</b>	Audits the status of an object to check if the workflow can progress further.
<b>Audit Release</b>	Audits the object to detect any errors that may prevent switching to another status
<b>View Workflows</b>	Allows you to view the workflow status of the <b>QCR</b> .
<b>Print</b>	Prints the <b>QCR</b> .
<b>Export</b>	Exports the <b>QCR</b> to a delimited text file (CSV), Microsoft Excel, or an XML file.
<b>Create Change</b>	Allows you to create a Change directly from the <b>QCR</b> .
<b>View Workflows</b>	Allows you to view the workflow status of a <b>QCR</b>

## Change Order in a QCR

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

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

1. In the Cover Page of a **QCR**, right-click and select **Create Change**.
2. Select a Change object type from the **Type** list - MCO, ECO, ECR, Deviation, or Stop Ship.
3. In the **Number** field, type a number or click the **AutoNumber**  button to generate a number.
4. The Add Affected Items to Change table lists all Affected Items of QCR and PSR. Select items 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 shows unique items (if the item shows up in the Affected Items and PSR Items, then the list displays the item only once).
5. Click **OK**.

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

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

1. Open the **QCR** and select **Actions | Create Change** menu option.
2. In the Create New dialog, select a **Change** object type from the sub-class list - MCO, ECO, ECR, Deviation, or Stop Ship.
3. In the **Number** field, type a number or click the **Autonumber**  button to generate a number.
4. The **Date Originated** field is pre-populated.

5. Click the Search palette to add **Versions**.
6. Use the Search palette to add **Affected Items**. Select and double-click an object to move it to the **Affected Items** field.
7. Click **Close**.
8. Click **Save**.

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

# Deleting Agile Objects

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

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

---

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

---

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

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

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

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

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

## Notes about Deleting PSR or QCR Objects

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

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

---

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

---

You *cannot* delete a **PSR** if:

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

You *cannot* delete a **QCR** if:

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

This section contains the following topics:

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

## Soft-Deleting an Object

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

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

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

The object is soft-deleted.

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

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

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

The object is soft-deleted.

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

## Undeleting an Object

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

### To undelete an object in Java Client:

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

### To undelete an object in Web Client:

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

---

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

---

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

## Hard-Deleting an Object

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

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

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

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

1. Run the appropriate Deleted <objects> search from the **Recycle Bin Searches** folder.
2. Select the one or more object rows in the search results table.
3. Click the **Delete** button.
4. In response to the warning prompt, choose **Continue**, then click **Finish**.

5. Or, you can hard-delete one object at a time:
  - Open the object.
  - Choose **Actions > Delete**, and respond **OK** to the confirmation prompt.

---

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

---

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