Agile Product Lifecycle Management for Process

Product Quality Scorecard User Guide

Release 6.0.0.6

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Agile Product Lifecycle Management for Process, Release 6.0.0.6

E29770-01

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June 2012

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About This Manual

Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site: http://www.oracle.com/technetwork/documentation/agile-085940.html contains the latest versions of the Agile Product Lifecycle Management for Process 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 Product Lifecycle Management for Process Documentation folder available on your network from which you can access the Agile PLM for Process documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Reader™ version 7.0 or later. This program can be downloaded from the Adobe Web site: http://www.adobe.com/.

If you need additional assistance or information, please go to http://metalink.oracle.com or phone 1.800.233.1711 for assistance.

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

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Agile Training Aids

Go to the Oracle University Web page 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.

Accessibility of Links to External Web Sites in Documentation

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.

Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide.*

Variability of Installations

Descriptions and illustrations of the Agile Product Lifecycle Management for Process user interface included in this manual may not match your installation. The user interface of Agile Product Lifecycle Management for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

Where to Find Information

Consult the table below to find specific information from the relevant Agile PLM for Process information source.

Table 1: Agile PLM for Process documentation topics, by source

Information type	PQS User Guide	PLM Admin. Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile PLM for Process		●		●		
Cache management		●				
Core data management		●				
Custom data management		●				
Feature requests					●	●
Group management		●				
Installing Agile PLM for Process				●		●
Known issues			●			
Reporting	●					
Resolved issues			●			
Samples	●					
Scorecards	●					
Sessions	●					

Table 1: Agile PLM for Process documentation topics, by source (continued)

Information type	PQS User Guide	PLM Admin. Guide	Release Notes	Agile training	Help Desk	Agile sales rep
System-based roles		●				
Technical support					●	
User management		●				
Using the PQS application	●			●		
Workflow management		●				

Document Conventions

The following formatting elements appear in Agile PLM for Process documentation.

Element	Meaning
Helvetica Condensed, 9 pt. bold type	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
`9 pt. monospace font`	Code samples
`10 pt. monospace font`	File names or directory names
Blue italic font	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
Note Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
Caution! Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
Important Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.

CHAPTER 1

Introduction to Product Quality Scorecard

This chapter provides an overview of the Agile Product Lifecycle for Process Product Quality Scorecard application. Topics in this chapter include:

- *Overview*
- *Getting Started with Product Quality Scorecard*

Overview

Product Quality Scorecard (PQS) provides your company with a tool for:

- Quality session management to organize and manage evaluation sessions
- Quality scorecarding based on testing protocols defined in Global Specification Management (GSM)
- Sample management with the ability to track supply source

Touch Points with Other Agile Applications

The Product Quality Scorecard application interfaces with several other Agile Product Lifecycle for Process applications.

Global Specification Management

Global Specification Management (GSM) serves as a tool to create and modify your products, including finished products and manufacturing processes. The data found in GSM is used by other Agile Product Lifecycle Management for Process applications as well as other systems in your company to support many different business processes. PQS uses testing protocols, which must be configured in GSM.

Supply Chain Relationship Management

Supply Chain Relationship Management (SCRM) provides a collaborative business process for managing supply chain relationships and sourcing approvals across product suppliers, distributors, and all other supply chain participants. You can use SCRM to build a view of the relationships between participants in a supply chain. Agile Product Lifecycle Management for Process can leverage the information that you provide in other applications such as GSM and SCRM.

In PQS, users create samples or participate in testing sessions. These samples and sessions can be associated with sourcing and receiving facilities created and managed in SCRM.

Reporting

PQS uses the Agile Product Lifecycle for Process Reporting application (RPT) framework for creating custom reports.

Getting Started with Product Quality Scorecard

Accessing Product Quality Scorecard

To access the Product Quality Scorecard application, select **PQS** from the left navigation panel as shown in figure 1-1 below or select **PQS** from the Applications menu of the top menu bar, as shown in figure 1-2.

Figure 1-1: The PQS menu from the left navigation panel

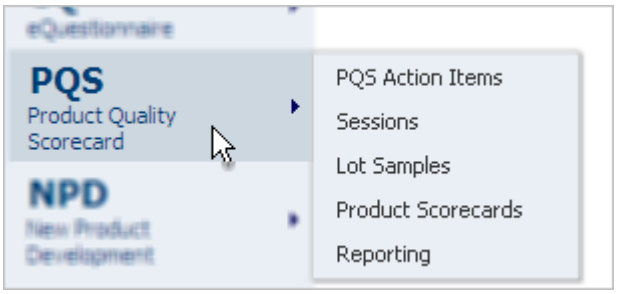
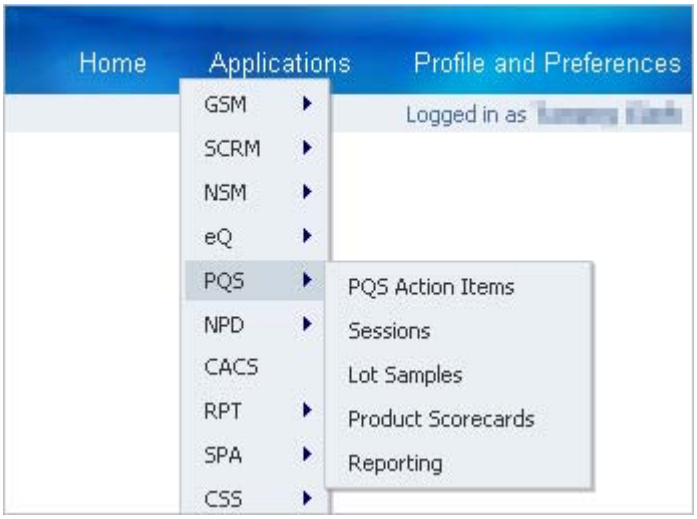


Figure 1-2: The PQS menu from the Applications menu on the top menu bar



For general information on using Agile Product Lifecycle for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

CHAPTER 2

Using Product Quality Scorecard

This chapter presents basic information about using the Product Quality Scorecard application. Topics in this chapter include:

- *Creating Samples*
- *Defining Sessions*
- *Testing Samples*
- *Using Scorecards*
- *Testing Protocols*
- *Reporting in PQS*

Overview

Product Quality Scorecard (PQS) can help you to track and manage product nonconformance, to remediate the root cause, to prevent nonconformance, and to continuously improve quality. Using the flexible, user-defined PQS scorecard architecture, you can specify criteria to use in evaluating incoming raw material or finished goods. Use Product Quality Scorecard to monitor quality at any phase of the product lifecycle.

Users with the following business functions use PQS:

- **Quality administrators**—Create quality sessions and product samples. They monitor PQS sessions, assign product samples and testers to PQS sessions, and can also run reports.
- **Evaluators**—Test PQS samples and score them according to the assigned protocol.
- **Management**—Customers write custom reports to analyze quality data.

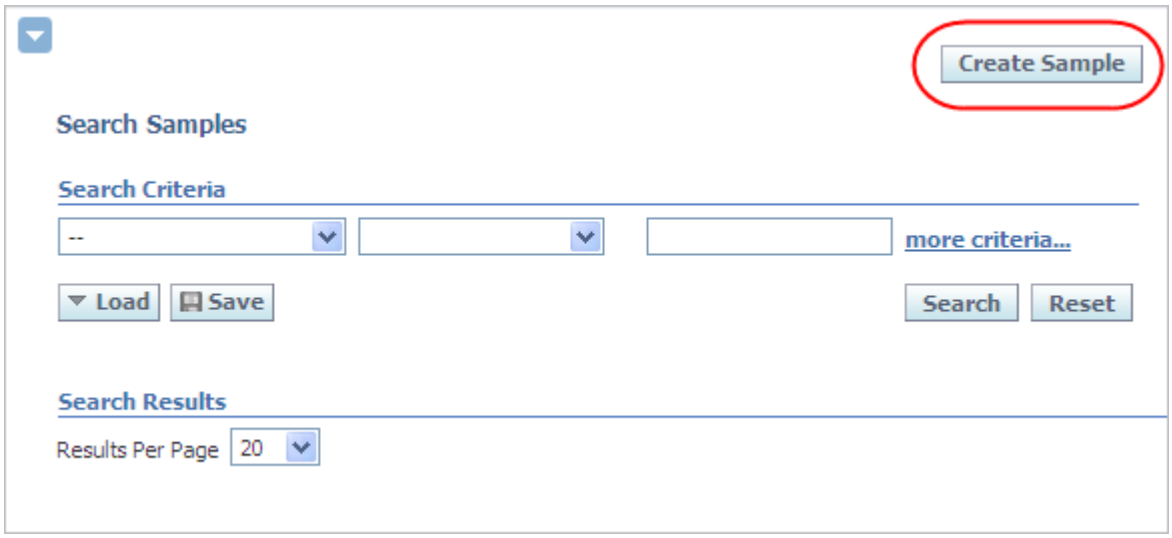
Creating Samples

Use Product Quality Scorecard to create sample records based on actual sample material. Samples can be created only for specifications that are in Global Specification Management (GSM).

To create a new sample:

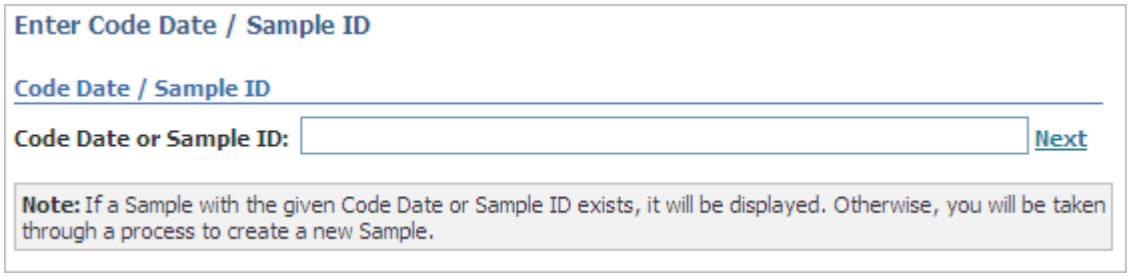
1 Select **PQS > Lot Samples** from the left navigation panel. The Search Samples page displays, as figure 2-1 shows below:

Figure 2-1: Search Samples page



2 Click **Create Sample** at the top right corner of the page (as shown in figure 2-1 above). Product Quality Scorecard displays the Enter Code Date /Sample ID page, as figure 2-2 shows below.

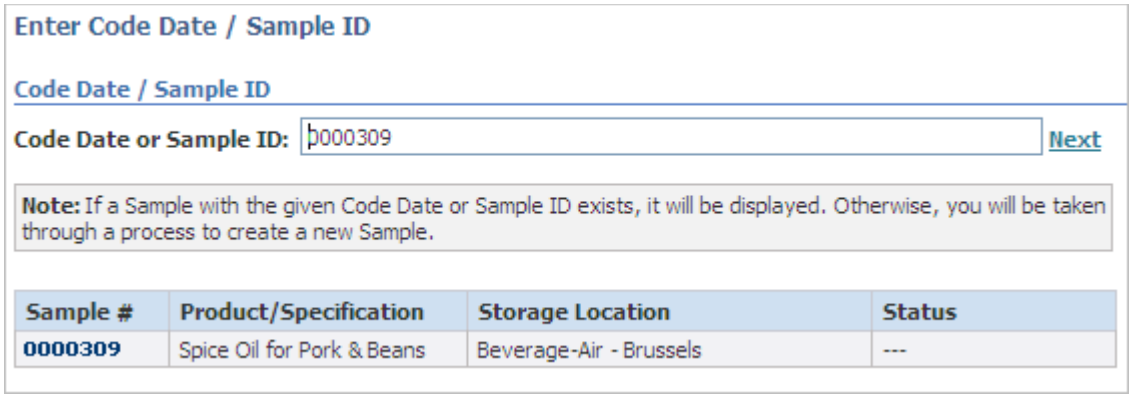
Figure 2-2: Enter Code Date/Sample ID page



3 Type the name of the sample to create in the **Code Date or Sample ID** field.

4 Click **Next** or press **Enter**. If a sample with the name that you typed already exists, PQS displays it in a table, as shown in figure 2-3 below:

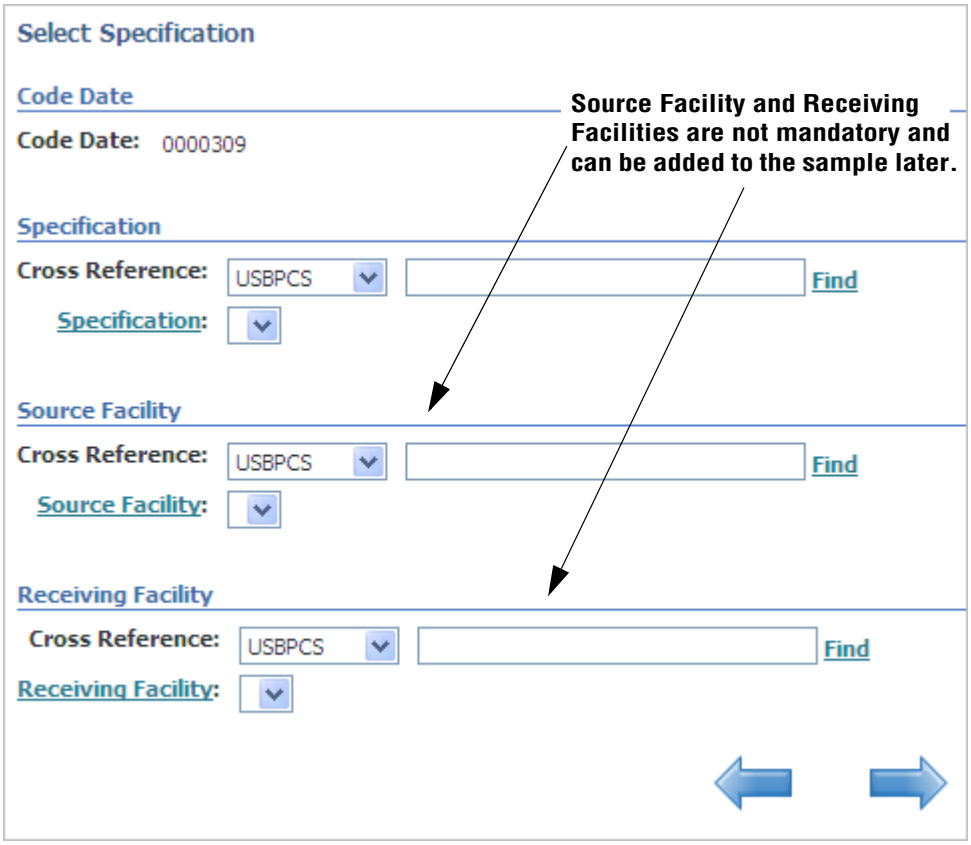
Figure 2-3: Existing samples matching the name entered



5 If a sample with that name does not exist, the Select Specification page displays, as shown in figure 2-4. Use this page to create a sample using the following sections:

- Code Date
- Specification—Associate the sample with a specification in GSM
- Source Facility—Associate the sample with a sourcing facility
- Receiving Facility—Associate the sample with a receiving facility

Figure 2-4: Select Specification page



6 In the Specification section, search for a particular specification. The field to the left of the Find link in this section is a required field. You can search in any of the following ways:

- Click the **Specification** link and select a specification using the specification search page.
- Search for a specification by cross-reference. Select a system ID from the Cross Reference drop-down list, enter an equivalent number for the specification, and click the **Find** link.
- Enter Source and receiving facilities entered in the same manner. If sourcing approvals exist for the specification that you have chosen, PQS populates possible source and receiving facilities for you.

If found, the specification that you selected will display in the Specification field.

7 Click the next page icon (). The Sample Summary page displays. This page consists of the following sections:

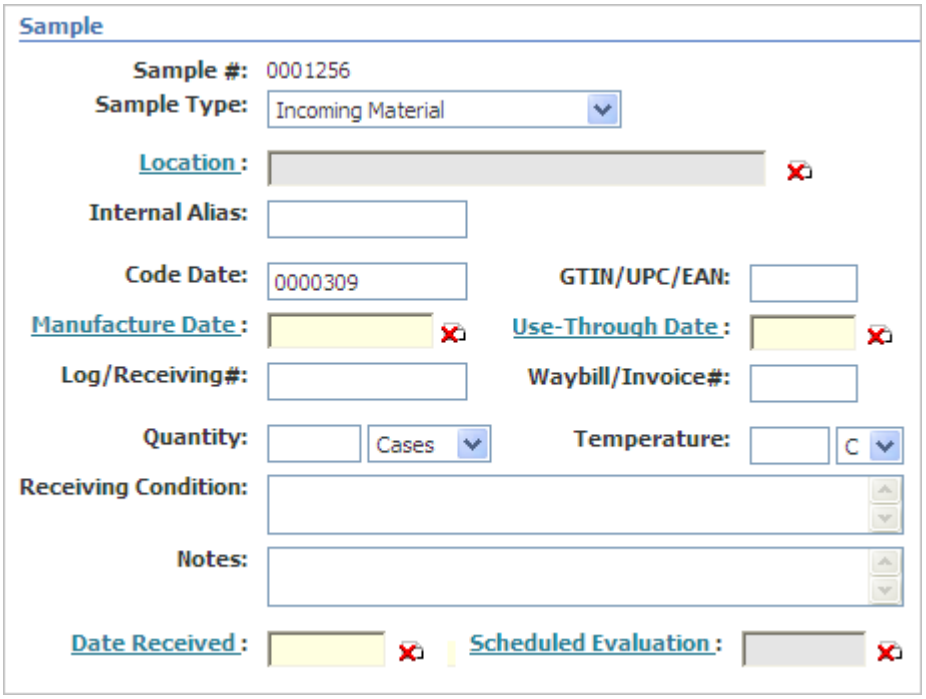
- Summary Information
- Sample
- Attachments

Note In the Summary Information section you can define the sourcing and receiving facility by clicking the field label and selecting facilities from the Facility Search page.

Sample Section

The Sample section, shown in figure 2-5 below, displays general information about the sample.

Figure 2-5: Sample section



Key fields include:

Sample #—A system-created unique identifier. This field cannot be changed.

Sample Type—A business-defined selection field. The system administrator defines this field.

Location—Use this field to search the SCRM facilities to identify where to use this sample.

Manufacture Date—Date on which the sample was manufactured.

Use-Through Date—Expiration date of the sample (required).

Date Received—Date on which the sample was received.

Scheduled Evaluation—Date on which the sample is expected to be tested.

Attachments Section

Use the Attachments Section to attach any documents that are related to the sample to be tested.

To add an attachment:

1. If the Sample Summary page is not already in edit mode, click **Edit** at the upper right of the page. PQS reloads the page in editable form.
2. Under the Attachments section, click **Add New**. The Attachments/Comments dialog box opens.
3. Click **Browse** to navigate to and select one or more local files to upload.

4 Click **Upload**.

5 Enter any comments in the **Comments** field.

6 Click **Done** at the top right of the dialog box. Figure 2-6 shows the Add New button. Figure 2-7 shows the Attachments/Comments dialog box.

Figure 2-6: Attachments section

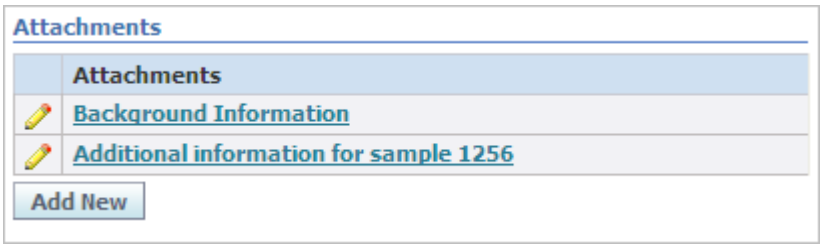
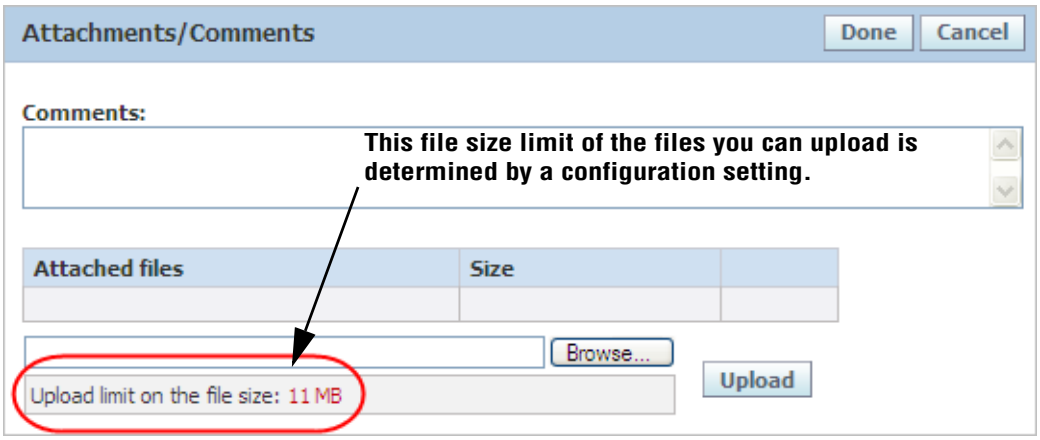


Figure 2-7: Attachments/Comments dialog box



7 Once you have entered all the information, click **Save & Close** to save the sample details. You can then create a session for testing the sample.

Defining Sessions

Product Quality Scorecard sessions establish the following:

- The relationship between the samples to be tested
- The users who will test the samples
- The testing protocol
- The scorecard type that will be used

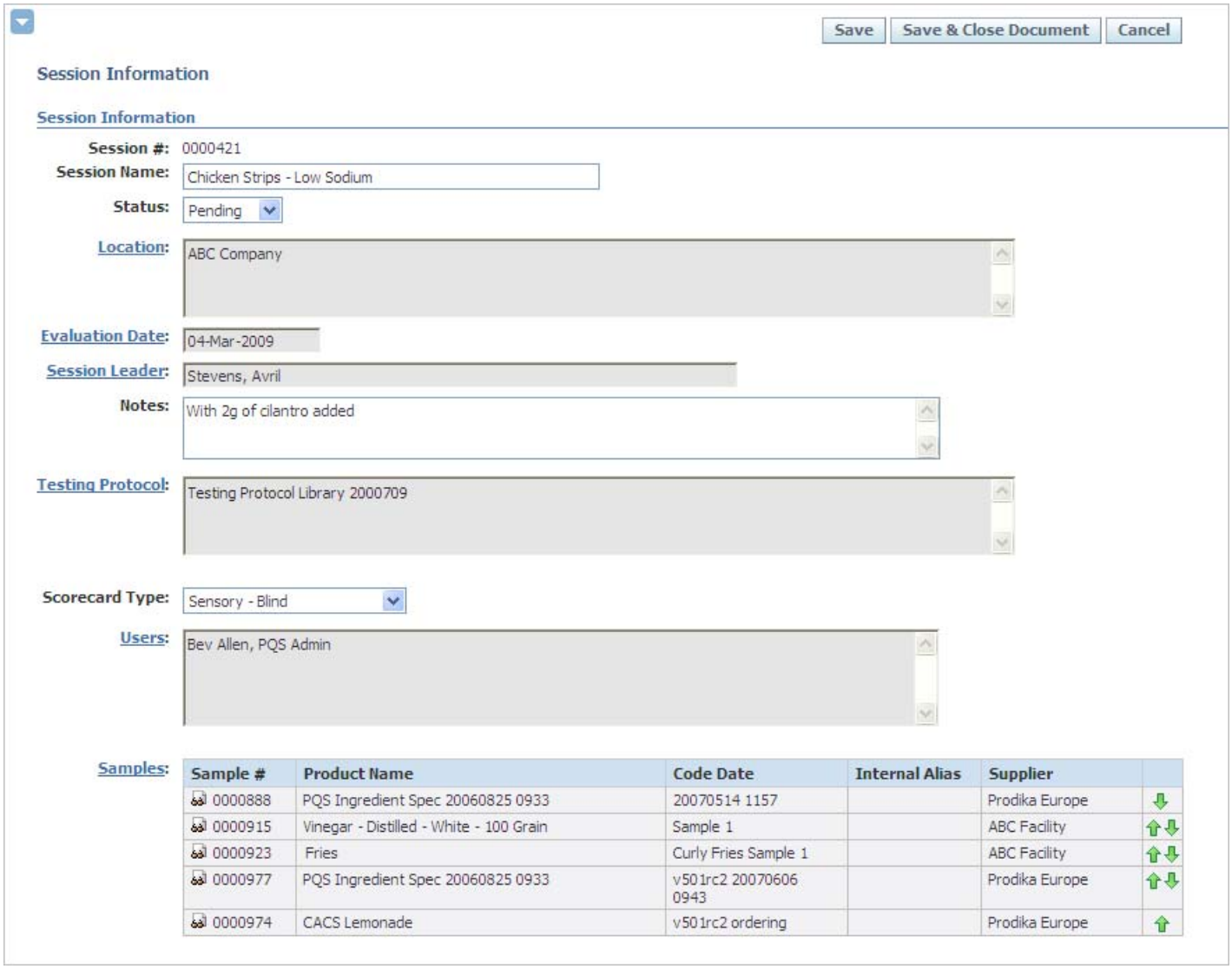
Typically, sessions are used for organized testing in which multiple testers test multiple samples sequentially. A quality administrator creates a PQS session using the Session Information page.

To create a session:

1. Click **Sessions** from the left navigation panel. Product Quality Scorecard displays the Search Sessions page. For more information on searching for an existing session, see *Searching for a Session* on page 2-10.
2. Click **Create Session**. The Session Information page displays, as figure 2-8 shows below.

> **Note** The ability to create sessions is role-based and is not available to all users.

Figure 2-8: Session Information page



3 Enter information in the applicable key fields.

Session #—A system-created unique identifier. This field cannot be changed.

Session Name—A free-text field (required).

Status—Select "Pending" or "Complete" from the drop-down list. Pending sessions show up in the Action Items list; completed session do not.

Location—Facility where the testing session will take place (required). Click the field link to use the Facility Search page to select a facility.

Evaluation Date—Date on which the session will take place. Click the field link to use the Calendar dialog box to select a date.

Session Leader—By default, the value of this field is the creator of the session in PQS. A session leader can be any other user as well. Click the field link to use a search page to select a user.

Testing Protocol—Defines the scorecard to use (scorecards are created based on testing protocols in GSM). This field is required. Click the field link to use a search page to select a protocol.

Scorecard Type—Defines the layout of the scorecard. Select a type from the drop-down list.

Users—A list of testers for this session. Click the field link to use a search page to select users.

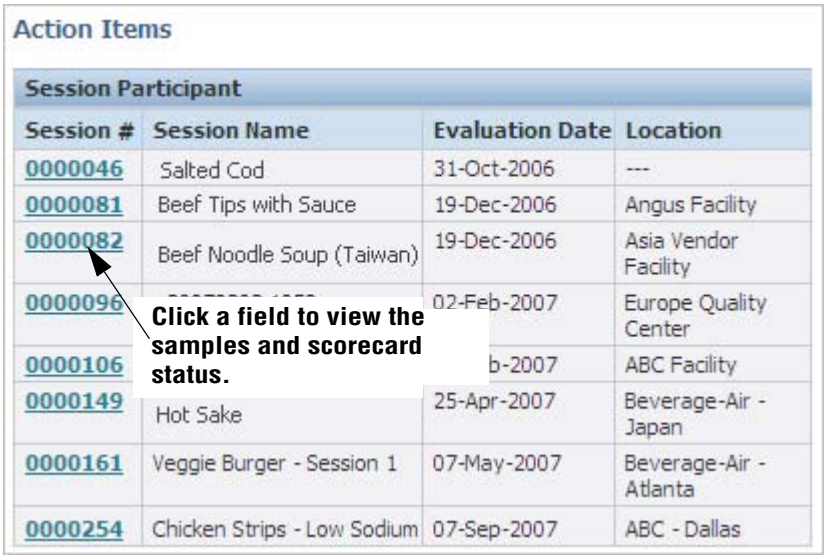
Samples—A list of samples to test in this session. Click the field link to use a search page to select samples.

4 Once you have entered all the information, click **Save & Close** to save the session. Each user defined as a tester (in the Users field) will receive an action item for the session in his or her Action Items list. Inside that session action item, a separate sub-action is created for each sample that is in the session.

Working with Action Items

View action items assigned to you by selecting **PQS Action Items** from the left navigation panel. Figure 2-9 shows the Action Items page.

Figure 2-9: Action Items page



This page lists all the pending sessions for which you are associated as a user. Clicking the session number displays the samples and the status of scorecards. As mentioned earlier, you will see one scorecard for each sample in the session. Once a session is complete, scorecards related to that session cannot be accessed from the action items.

Searching for a Session

Use the Search Sessions page to search for a session in the same way that you perform other searches in Agile Product Lifecycle for Process. The page consists of two tabs: Search and Pending Sessions.

Pending Sessions Tab

As shown in figure 2-10, the Pending Sessions tab consists of two lists of sessions:

Session Leader—Includes all sessions for which you are the session leader.

Session Participant—Includes all sessions for which you are a participant (tester).

Click the hyperlinked session number in the **Session #** column to open the session.

Figure 2-10: Pending Sessions tab



Testing Samples

You can navigate to sample scorecards that you need by:

- Selecting a session from the Action Items page
- Searching for and then selecting a sample using the Lot Samples search page (see *Using the Lot Samples Page* on page 2-13)

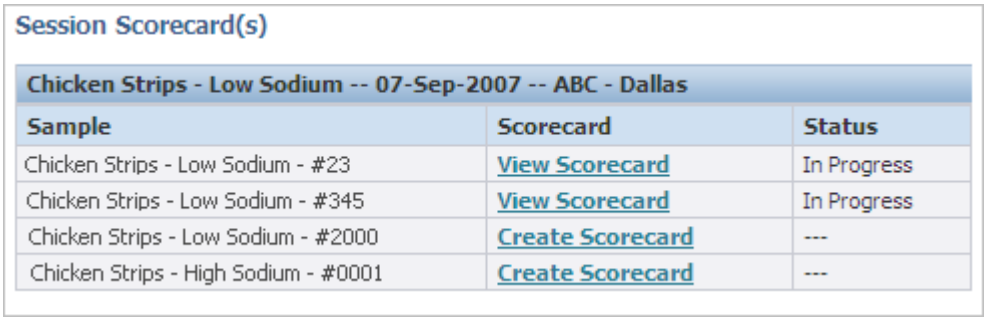
Using Action Items

If you are assigned as a tester for a particular session, your Action Items list includes an item to create a scorecard for each sample in the session. On the Action Items page, click the hyperlinked number in the **Session #** column. PQS displays the Session Scorecard(s) page.

For each sample, click the **View Scorecard** link in the Scorecard column to view an existing scorecard or the **Create Scorecard** link to create a new scorecard. The Scorecard Observation dialog box opens.

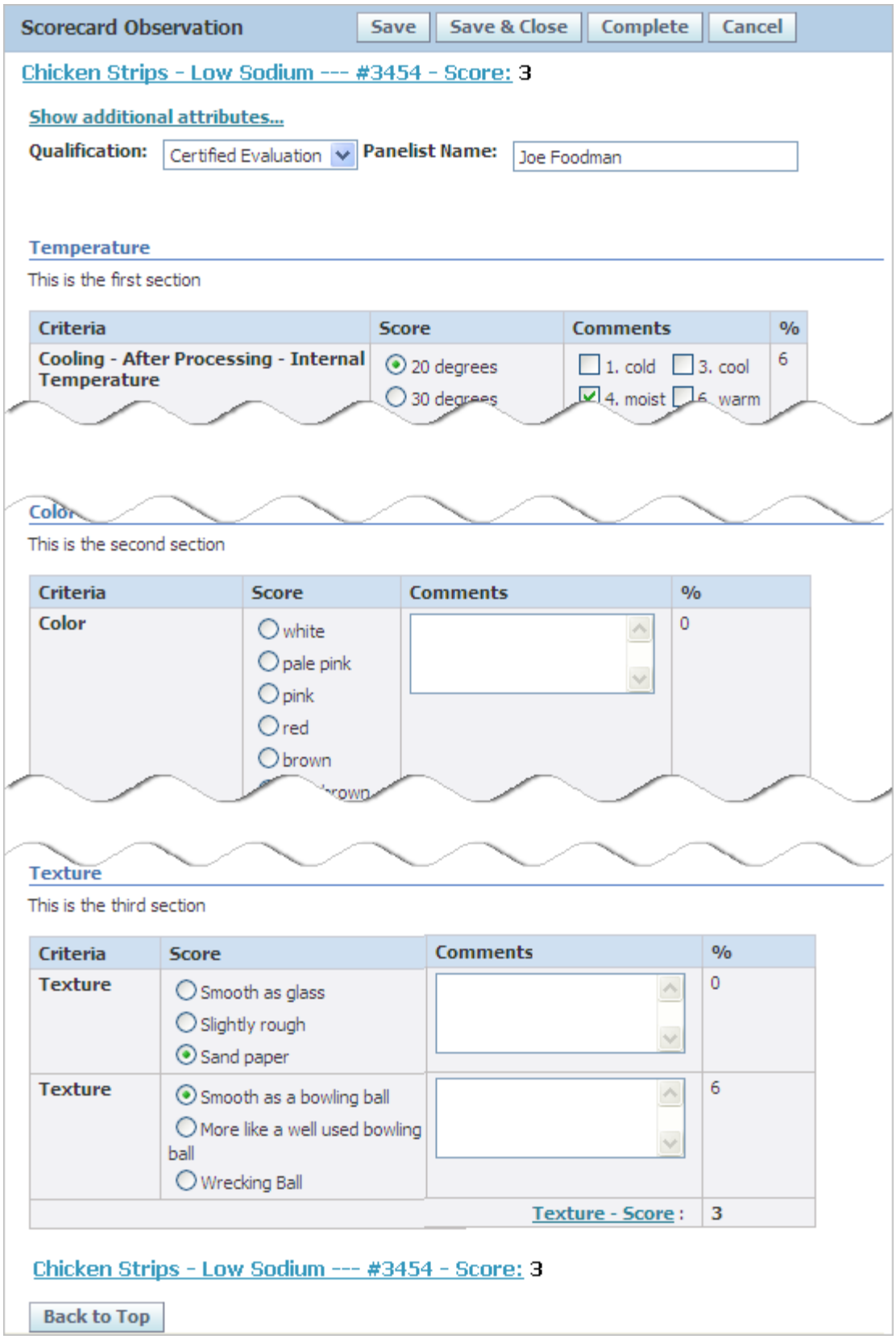
You can partially complete a scorecard and then save it for later completion. Figure 2-11 shows the Session Scorecard(s) page:

Figure 2-11: Session Scorecard(s) page



When you click the **View Scorecard** or **Create Scorecard** link, the Scorecard Observation page displays the scorecard, as shown in figure 2-12 below. The contents of this page can vary, depending on which testing protocol and which scorecard was selected for the session.

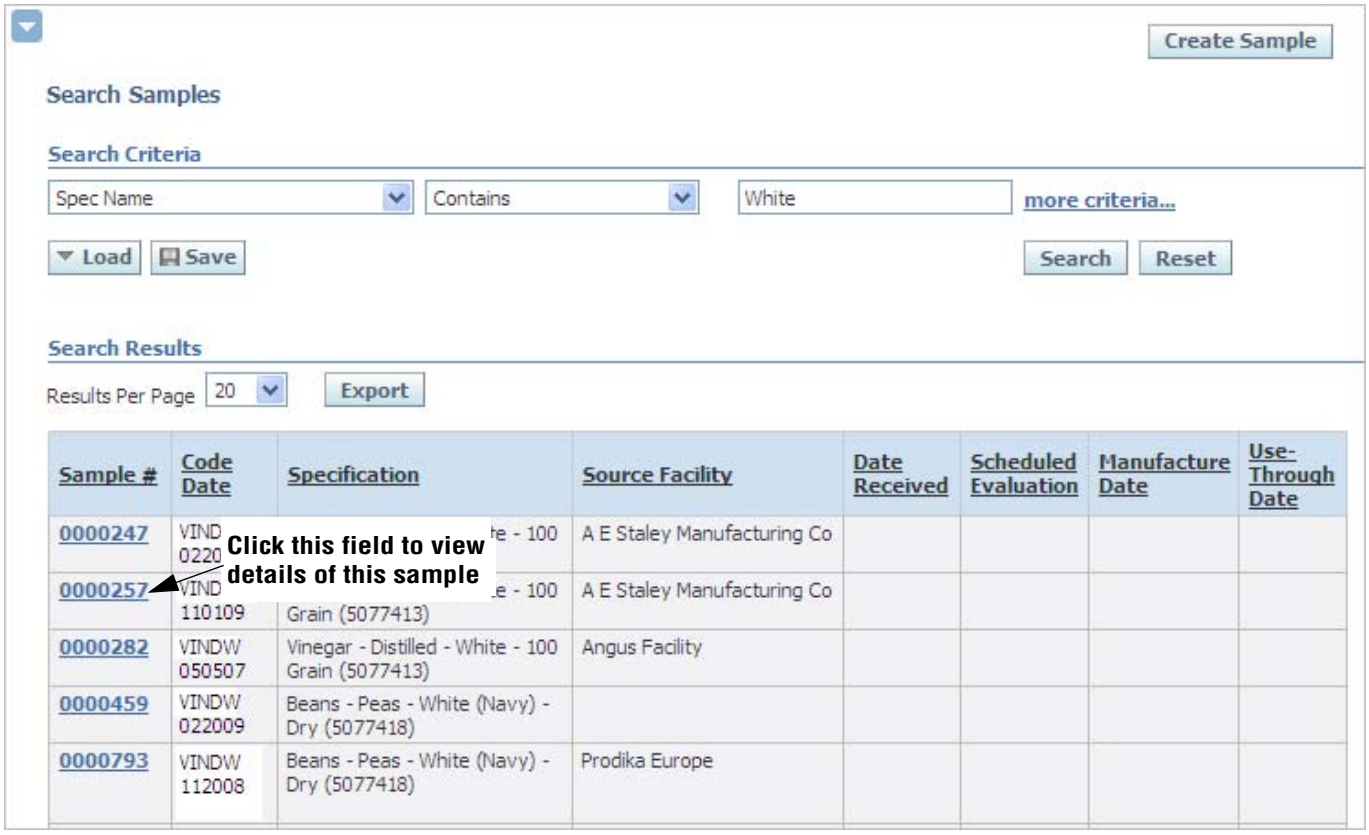
Figure 2-12: Scorecard Observation page



Using the Lot Samples Page

You can also test a sample by clicking **Lot Samples** in the left navigation pane and using the Search Samples page to select the sample to test. Figure 2-13 shows the Search Samples page with returned results.

Figure 2-13: Search Samples page with returned samples



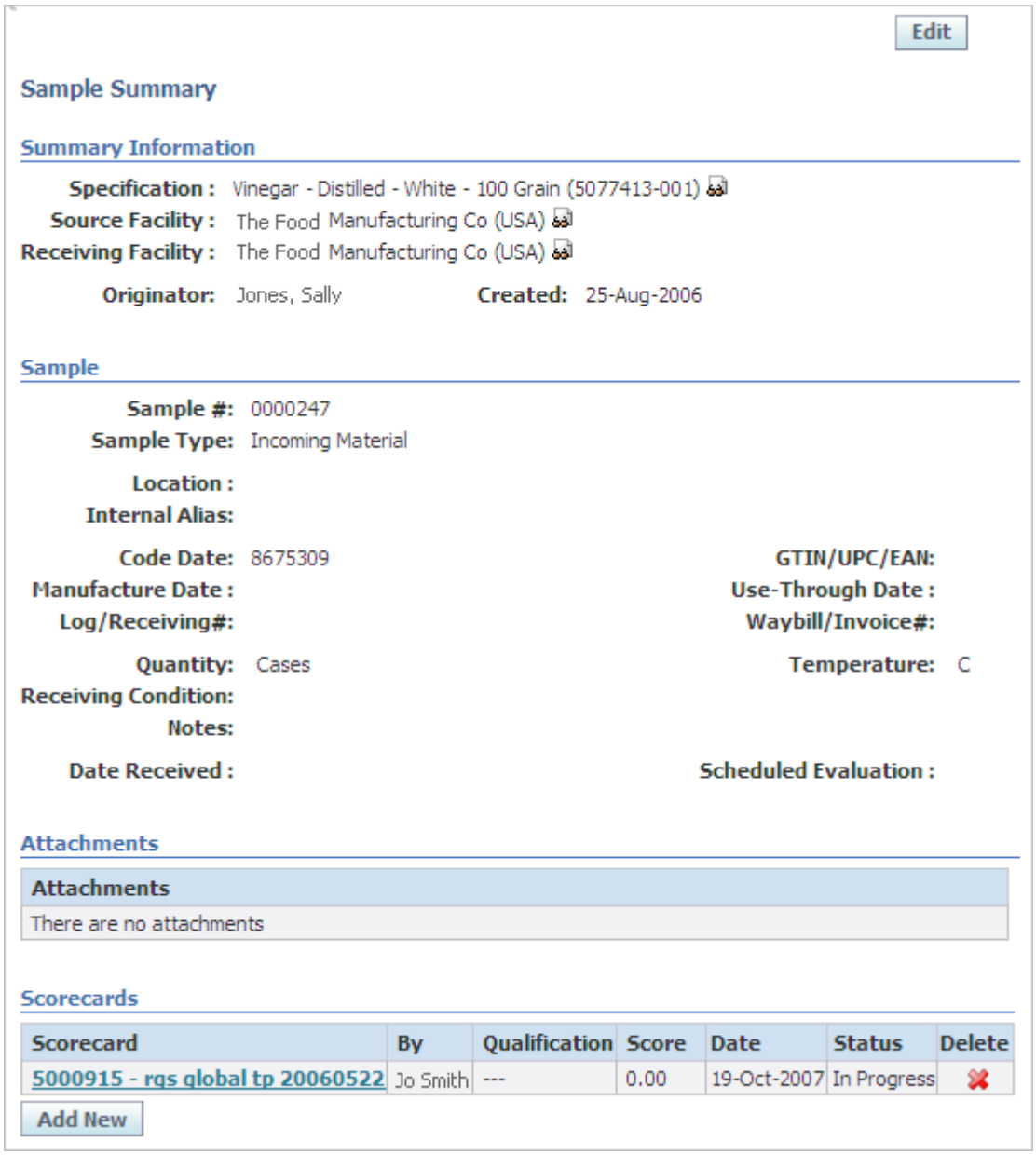
Refer to *Searching for a Session* on page 2-10 for more information on searching.

Click the hyperlinked number in the **Sample #** column to open the sample.

Note Typically, if one sample is being tested by one person, there is no need to create a session. Instead, navigate directly to the sample and score the sample there.

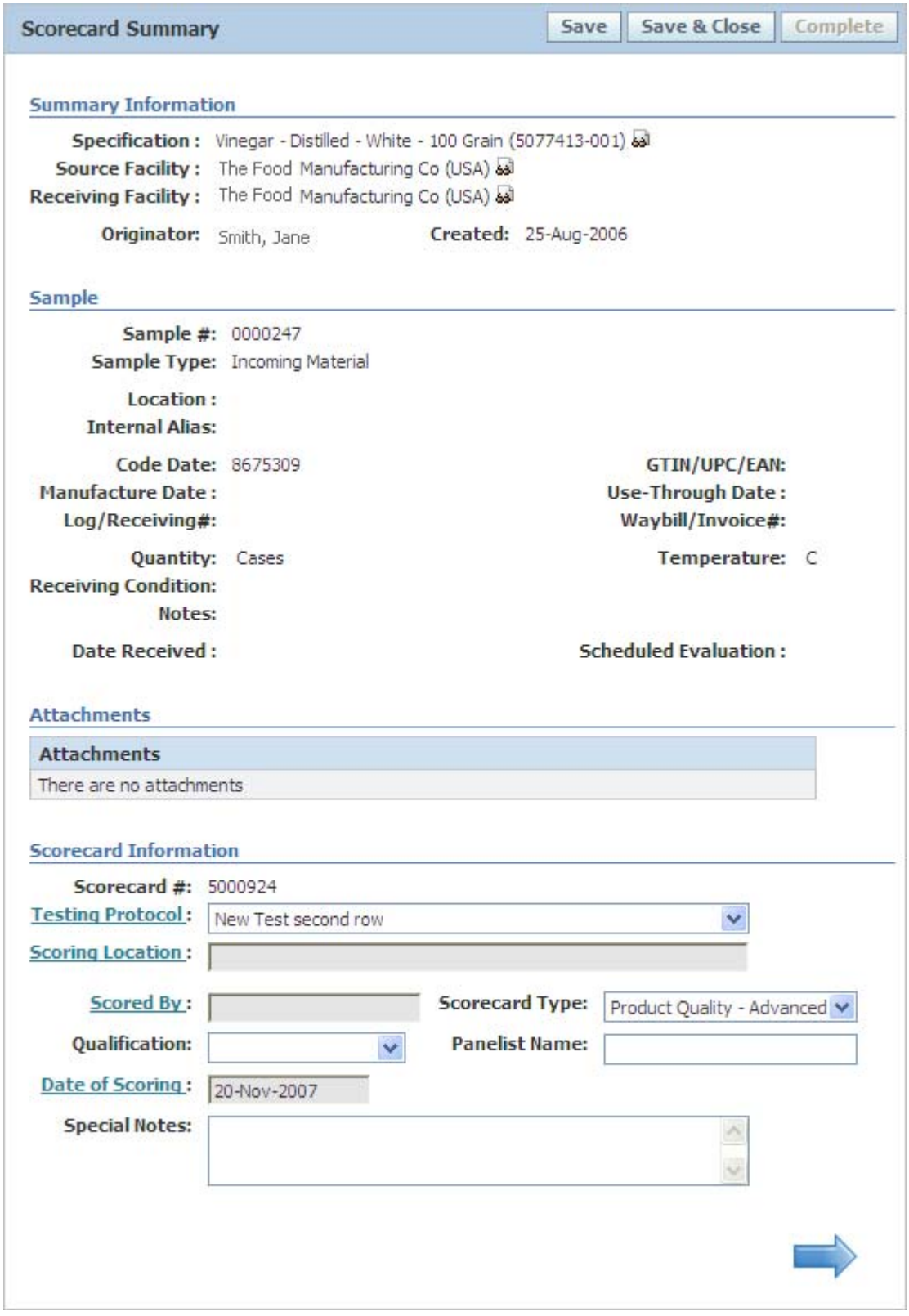
Figure 2-14 shows the Sample Summary page of the selected sample.

Figure 2-14: Sample Summary for selected sample



To create a new scorecard for the sample, click **Add New** under the Scorecards section. Product Quality Scorecard displays the Scorecard Summary page, as shown in figure 2-15 below.

Figure 2-15: Scorecard Summary page



The Scorecard Summary page consists of the following sections:

- Summary Information
- Sample
- Attachments
- Scorecard Information

Summary Information Section

As shown in figure 2-16 below, the Summary Information section displays the core information about the session:

- Specification
- Originator
- Sourcing facility
- Creation date
- Receiving facility

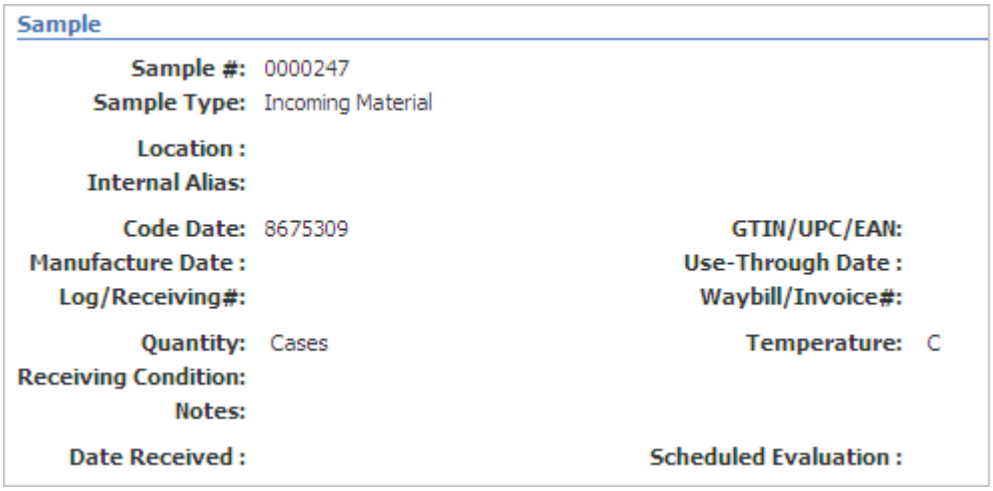
Figure 2-16: Summary Information section



Sample Section

As shown in figure 2-17 below, the Sample section displays information about the sample in the following fields: Sample #, Sample Type, Location, Manufacture Date, Date Received, and several other fields that describe the sample.

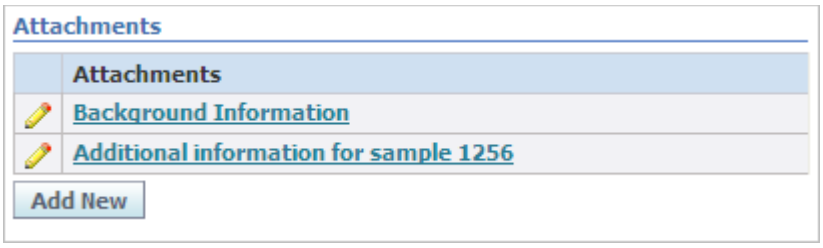
Figure 2-17: Sample section



Attachments Section

The Attachments section, shown in figure 2-18 below, lists all the attachments related to the sample.

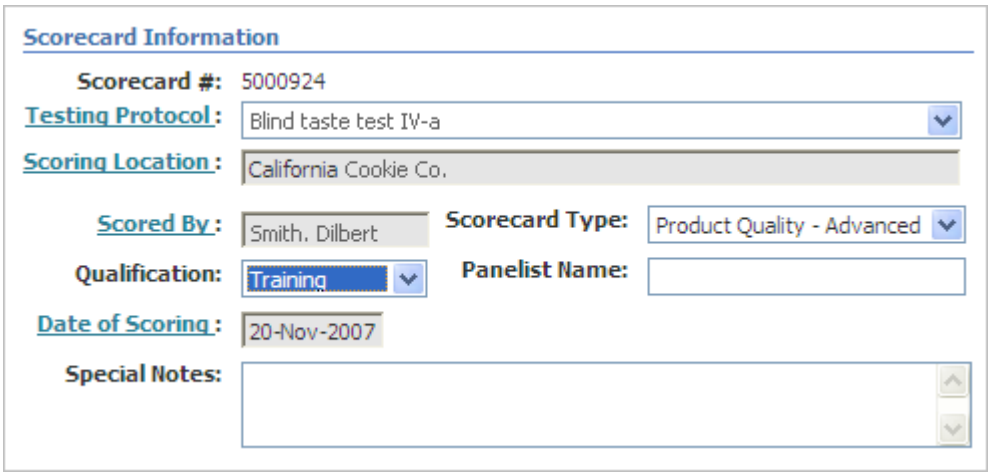
Figure 2-18: Attachments section



Scorecard Information Section

The Scorecard Information section, shown in figure 2-19 below, displays default information about how the sample will be tested.

Figure 2-19: Scorecard Information section



Key fields include:

Scorecard #—A system-created unique identifier. This field cannot be changed.

Testing Protocol—Prepopulated with the default value if a testing protocol is defined for that specification in GSM. You can select another testing protocol by clicking the **Testing Protocol** link.

Scored By—Click the **Scored By** link and select the person testing the sample (required).

Scorecard Type—Select a scorecard type from the drop-down list.

Qualification—Select a qualification from the drop-down list. This list is defined by a system administrator.

Panelist Name—The name of the panelist who will complete the scorecard.

Date of Scoring—Defaults to today's date. Click the hyperlinked **Date of Scoring** field label to change it.

When you click the next page icon (), Product Quality Scorecard displays a new scorecard.

Using Scorecards

The PQS scorecard defines how tests are displayed to the tester. The two types of scorecards available are:

- Sensory - Blind
- Blind Sensory - 9 point scale

Sensory - Blind

This scorecard displays the basic information about the sample but does not tell the tester any details about the supplying company or the specification name.

PQS administrators are able to see product and supplier details on this type of scorecard.

Blind Sensory - 9 point scale

This scorecard is designed to handle up to a 9-point rating continuum and has a different layout from the Sensory - Blind format. It also does not relate information about the specification or the supplier.

PQS administrators are able to see product and supplier details on this type of scorecard.

Testing Protocols

A testing protocol defines which tests will be displayed on a scorecard. You can define testing protocols in Global Specification Management. Use them to create scorecards in the PQS application. For details on testing protocols, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide.*

Reporting in PQS

You can develop custom reports against the data gathered in the Product Quality Scorecard application. If a custom report has been developed, you can access it from PQS if you have the Reporting application installed in your environment. Some examples of custom reports are:

- Benchmark reports
- Comparison reports to compare quality of samples from different suppliers or over a period of time
- Supplier performance reports
- Product quality reports

For more information on reporting, please see the *Agile Product Lifecycle Management for Process Reporting User Guide.*