Oracle® Agile Product Lifecycle Management for Process

Product Quality Scorecard User Guide

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Oracle Agile Product Lifecycle Management for Process Product Quality Scorecard User Guide, Release 6.2.1

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Preface

The *Agile Product Lifecycle Management for Process Product Quality Scorecard User Guide* explains how to use the Product Quality Scorecard (PQS) application to create, organize, and manage quality sessions. You will learn to create scorecards based on testing protocols and manage samples.

This Preface contains these topics:

- Audience
- Variability of Installations
- Security settings as they apply to the system and your user account
- Related Documents
- Conventions

Audience

This guide is intended for end users who are responsible for creating and managing information in Agile PLM 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 PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM 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

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Related Documents

For more information, see the following documents in the Agile PLM for Process Release documentation set:

- *Agile Product Lifecycle Management for Process Administrator User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*
- *Agile Product Lifecycle Management for Process Reporting User Guide*
- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

  http://www.oracle.com/technetwork/documentation/agile-085940.html

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction to Product Quality Scorecard

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 PLM for Process Applications

The Product Quality Scorecard application interfaces with several other Agile PLM 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 PLM 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. For more information, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

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 PLM 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 are associated with sourcing and receiving facilities created and managed in SCRM. For more information, see the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*.

Reporting

PQS uses the Agile PLM for Process Reporting application (RPT) framework for creating custom reports. See the *Agile Product Lifecycle Management for Process Reporting User Guide* for more information.

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 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

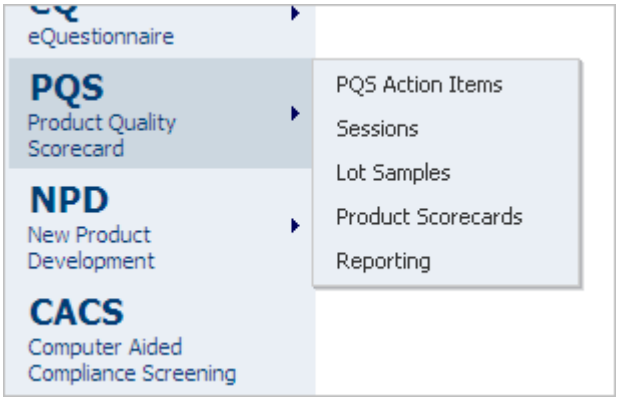
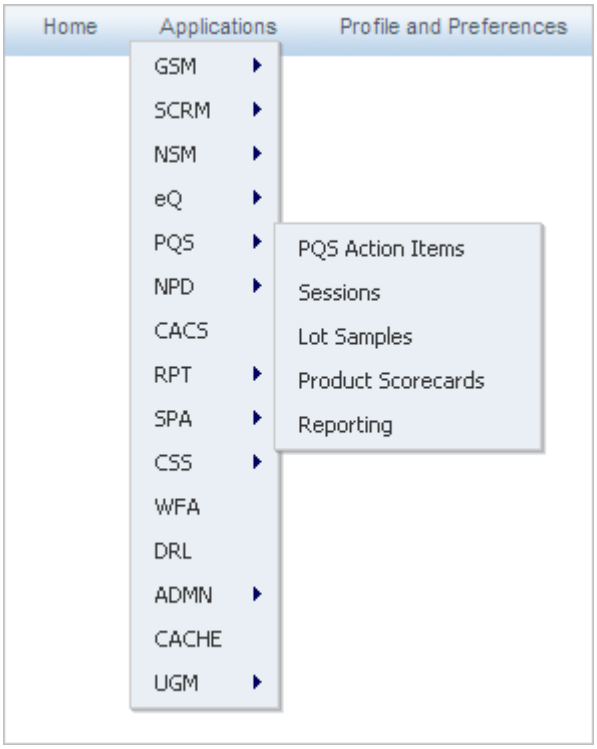


Figure 1–2 The PQS menu from the Applications menu on the top menu bar



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

2

Using Product Quality Scorecard

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

- Overview
- 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.

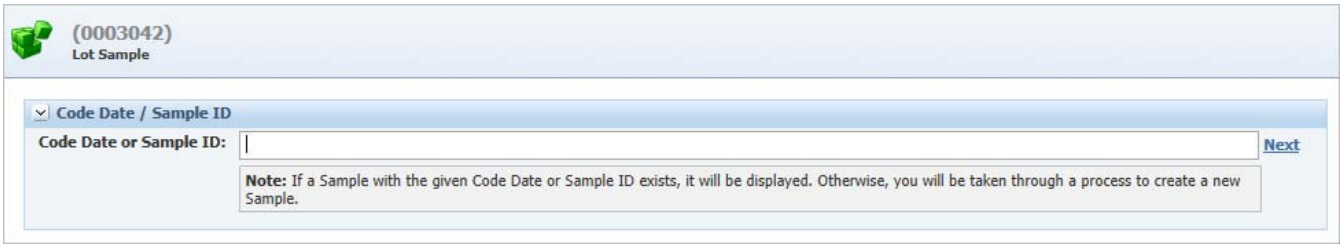
Creating Samples

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

To create a new sample:

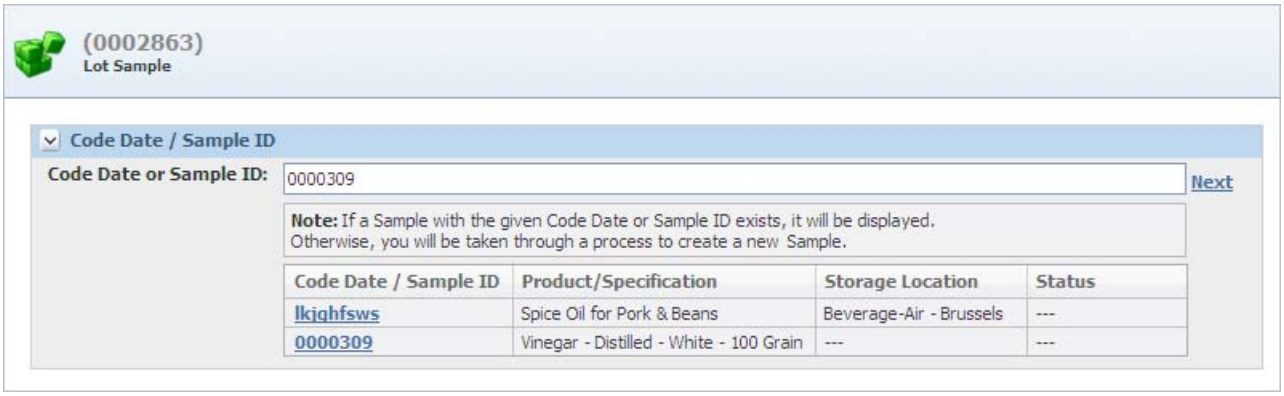
1. Select **New > Lot Sample** from the action menu. Product Quality Scorecard displays the Lot Sample page, as Figure 2–1 shows.

Figure 2–1 Lot Sample page



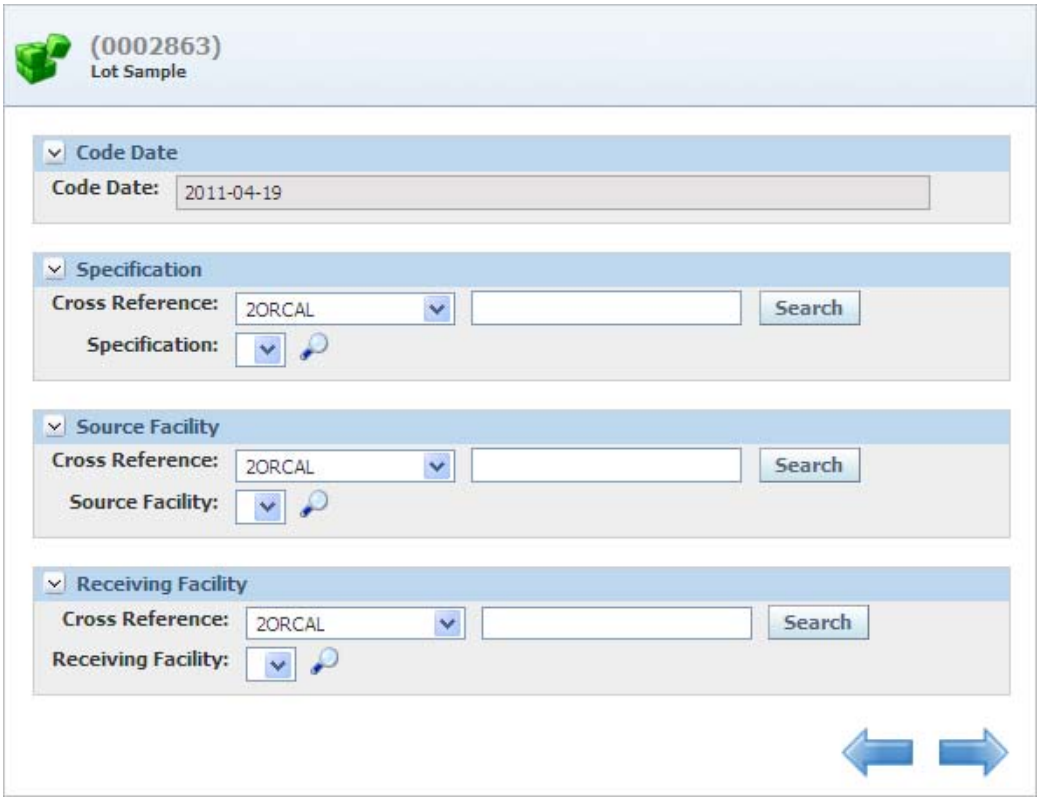
2. Type the code date or ID of the sample in the **Code Date or Sample ID** field.
3. Click **Next** or press **Enter**. If a sample with the ID that you typed already exists, PQS displays it in a table, as shown in Figure 2–2:

Figure 2–2 Existing samples matching the name entered



4. If a sample with that name does not exist, the Select Specification page displays, as shown in Figure 2–3. Use this page to create a sample using the following sections:
   - **Code Date**—Displays the Code Date or ID that you entered in the previous screen
   - **Specification**—Associate the sample with a specification in GSM. This is a required field.
   - **Source Facility**—Associate the sample with a sourcing facility
   - **Receiving Facility**—Associate the sample with a receiving facility

Figure 2–3 Select Specification page



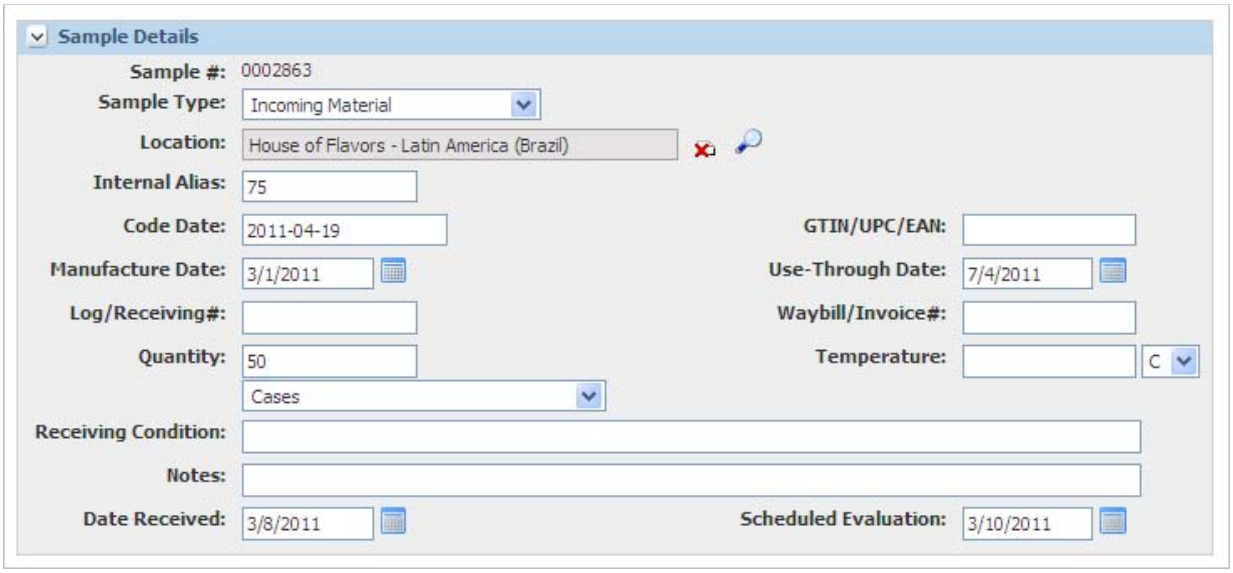
5. In the Specification section, search for a particular specification. The **Specification** field to the left of the search icon in this section is a required field. You can search in any of the following ways:
   - Click the search icon and select a specification using the specification search page.
   - 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 **Search**. Matching specifications are listed in the Specification drop down list. Select one specification.
6. Enter source and receiving facilities in the same manner. If sourcing approvals exist for the specification that you chose, PQS populates possible source and receiving facilities for you. The Source Facility and Receiving Facility fields are not mandatory and can be added to the sample later.
7. Click the next page icon. The Sample Summary page displays. This page consists of the following sections:
   - Summary Information
   - Sample Details
   - Attachments

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

Sample Details Section

The Sample Details section, shown in Figure 2–4, displays general information about the sample.

Figure 2–4 Sample Details section



Key fields include:

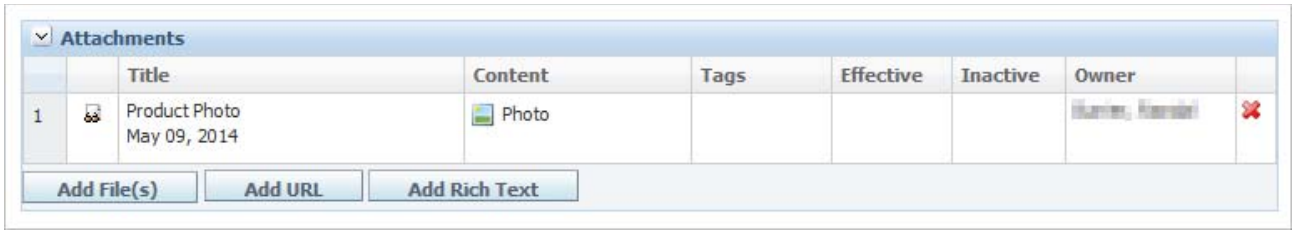
- **Sample #**—An auto generated unique identifier. This field cannot be changed.
- **Sample Type**—This is used to further describe the sample, for example, Incoming Material versus Internally Manufactured Product. The available options in this list are defined by your administrator using the ADMN application.
- **Location**—Use this field to identify where to use or evaluate this sample. This field allows you to associate the sample to a facility defined in SCRM.
- **Internal Alias**—This is an identifier used when displaying samples to Session Participants. See Figure 2–9 on page 2-9 for an example.
- **Manufacture Date**—Date on which the sample was manufactured. Click the calendar icon to select a date.
- **Use-Through Date**—Expiration date of the sample (required). Click the calendar icon to select a date.
- **Date Received**—Date on which the sample was received. Click the calendar icon to select a date.
- **Scheduled Evaluation**—Date on which the sample is expected to be tested. Click the calendar icon to select a date.

Attachments Section

Use the Attachments Section to attach any files, URLs, or rich text that are related to the sample to be tested. There are two ways to add files: you can drag and drop files onto the control or click **Add File(s)**.

For more information on this commonly used section, refer to the *Agile Product Lifecycle Management for Process Getting Started Guide*.

Figure 2–5 Attachments section



Defining Sessions

Product Quality Scorecard sessions establish the following:

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

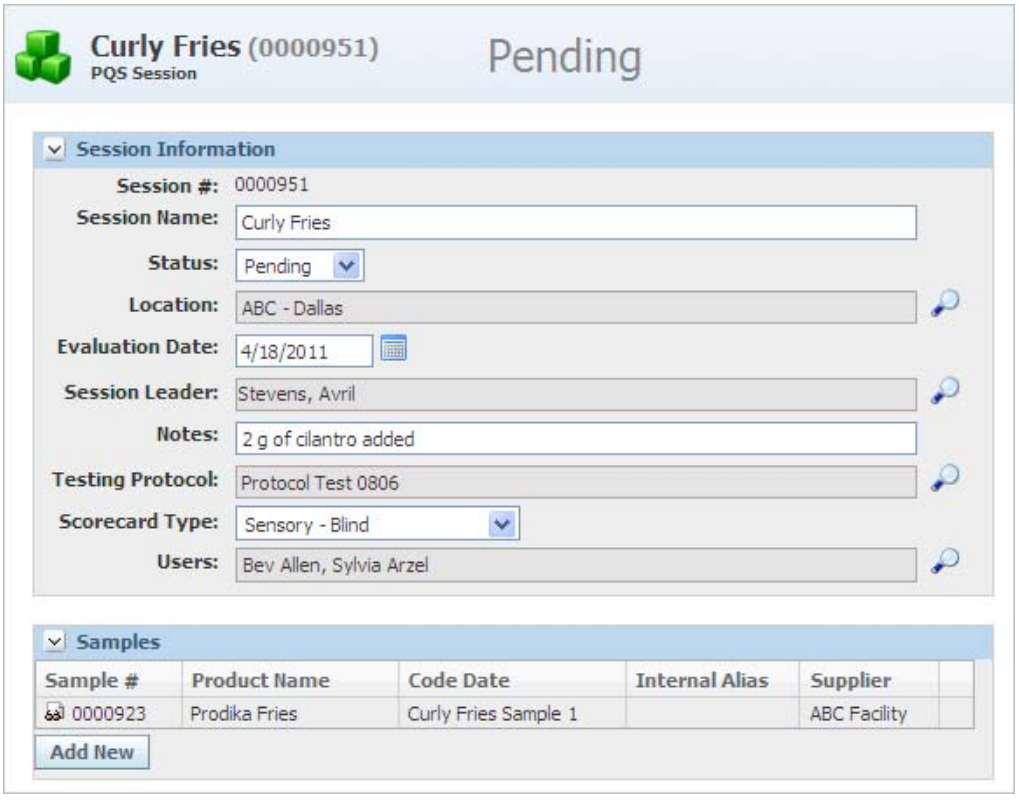
Typically, sessions are used for organized testing in which multiple testers test multiple samples sequentially. A quality administrator creates a PQS session using the Session Information page.

To create a session:

1. Click **New > PQS Session** from the action menu. The PQS Session page displays, as Figure 2–6 shows.

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

Figure 2–6 PQS Session page



The page consists of two sections: Session Information and Samples.

2. In the Session Information section, enter information in the applicable key fields.
   - **Session #**—An auto-generated 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 appear in the Action Items list; completed sessions do not.
- **Location**—Facility where the testing session will take place (required). Click the search icon to use the Facility Search page to select a facility.
- **Evaluation Date**—Date on which the session will take place. Click the calendar icon 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 search icon 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 search icon 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 search icon to use a search page to select users.

3. In the Samples section, click **Add New** 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) receives 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 action menu. PQS displays the Action Items page, as shown in Figure 2–7.

Figure 2–7 Action Items page



This page lists all the pending sessions for which you are associated as a user. Clicking any row 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 PQS Session Search page to search for a session in the same way that you perform other searches in Agile PLM for Process. The page consists of two tabs: Search and Pending Sessions.

Pending Sessions Tab

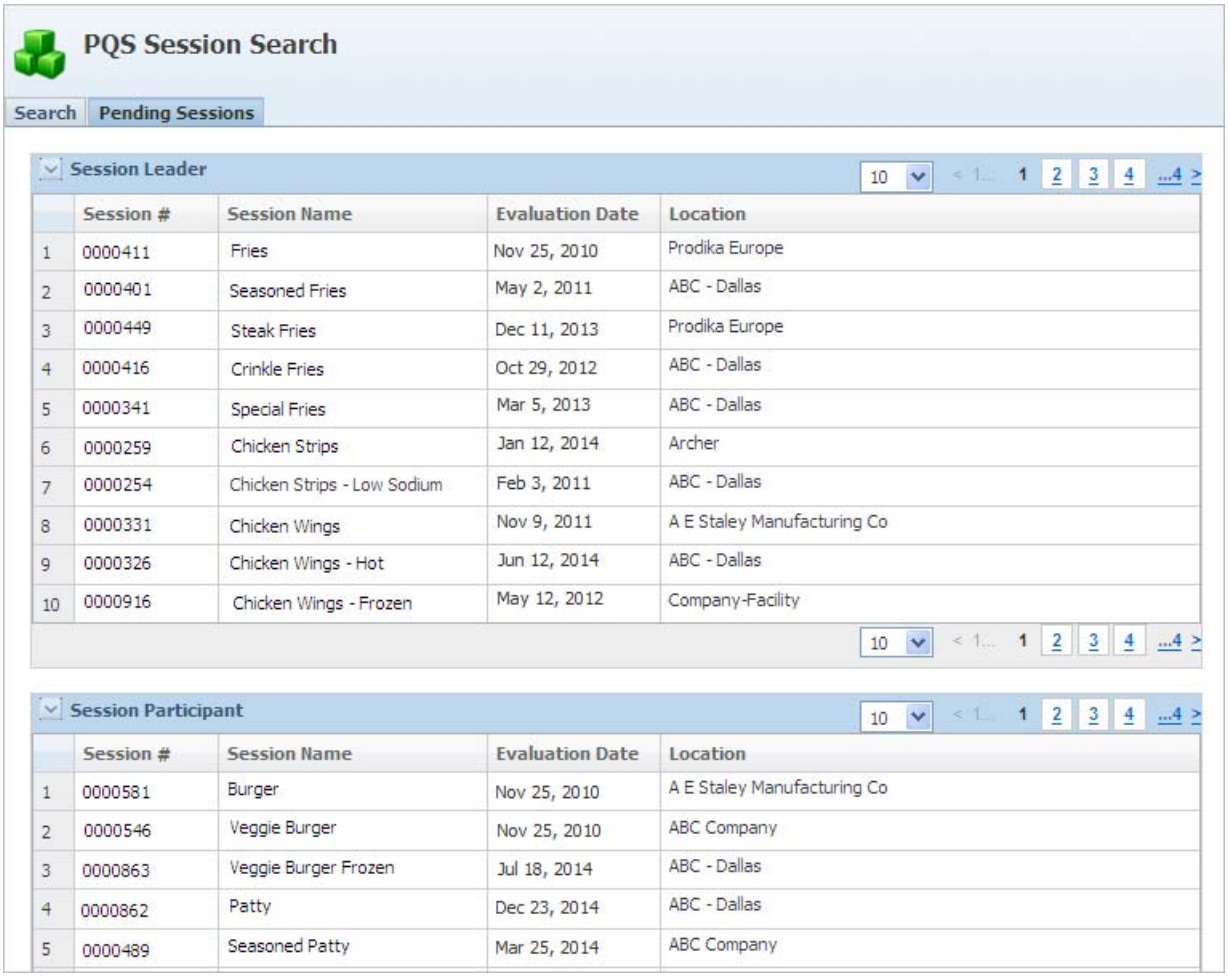
As shown in Figure 2–8, the Pending Sessions tab consists of two lists of sessions:

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 anywhere in a row to open the session.

Figure 2–8 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 Sample Search page (see "Using the Lot Samples Page" on page 2-10)

Using Action Items

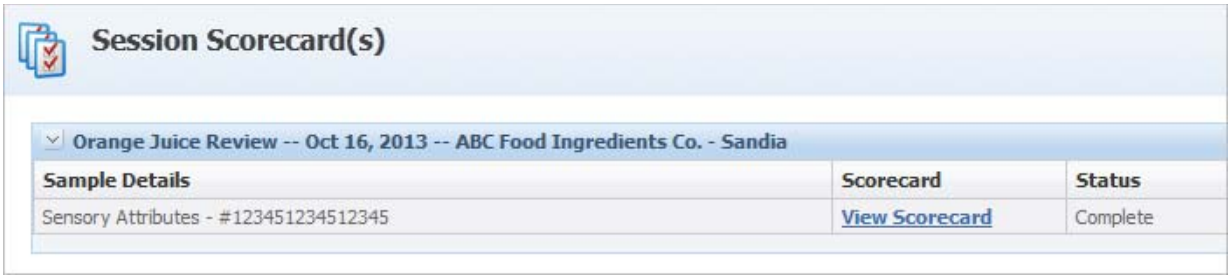
If you are assigned as a tester for a particular session, your Action Items list includes an item to create a scorecard for each sample in the session. On the Action Items page, click anywhere in a row to open a session. PQS displays the Session Scorecard(s) page, shown in Figure 2–9.

The Sample Details column shows the testing protocol name and internal alias number.

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.

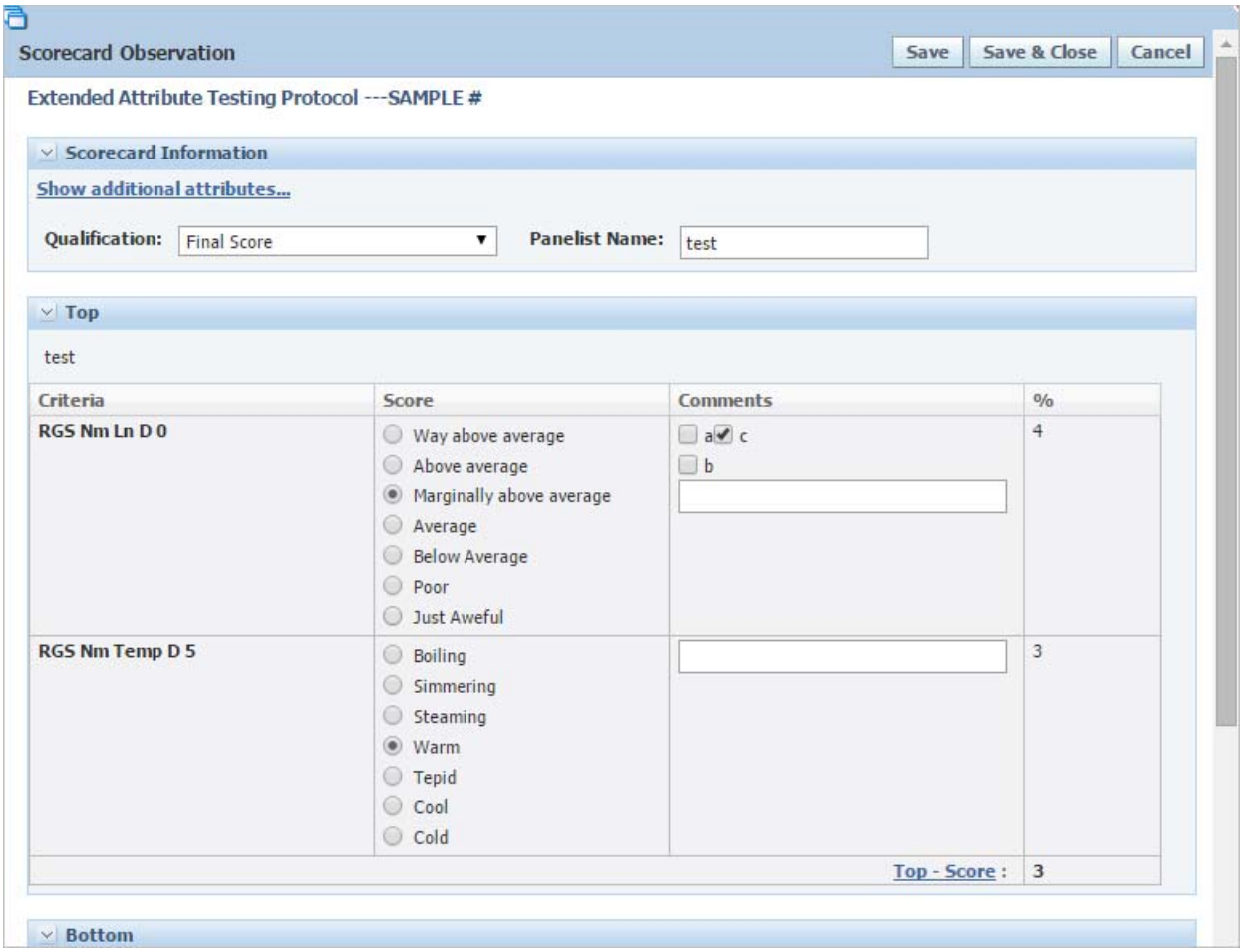
You can partially complete a scorecard and then save it for later completion.

Figure 2–9 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 2–10. The contents of this page can vary, depending on which testing protocol and which scorecard was selected for the session.

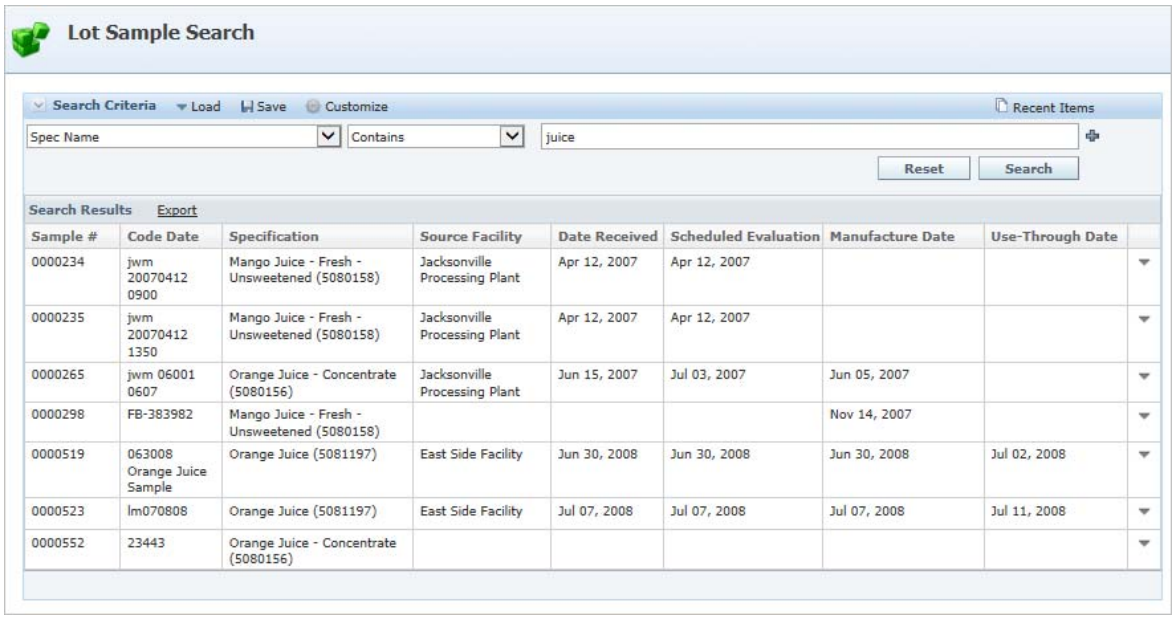
Figure 2–10 Scorecard Observation page



Using the Lot Samples Page

You can also test a sample by selecting **Open > Lot Sample** from the action menu and using the Lot Sample Search page to select the sample to test. Returned samples are displayed on the Search Samples page, as Figure 2–11 shows.

Figure 2–11 Search Samples page with returned samples



Sample #	Code Date	Specification	Source Facility	Date Received	Scheduled Evaluation	Manufacture Date	Use-Through Date
0000234	jwm 20070412 0900	Mango Juice - Fresh - Unsweetened (5080158)	Jacksonville Processing Plant	Apr 12, 2007	Apr 12, 2007		
0000235	jwm 20070412 1350	Mango Juice - Fresh - Unsweetened (5080158)	Jacksonville Processing Plant	Apr 12, 2007	Apr 12, 2007		
0000265	jwm 06001 0607	Orange Juice - Concentrate (5080156)	Jacksonville Processing Plant	Jun 15, 2007	Jul 03, 2007	Jun 05, 2007	
0000298	FB-383982	Mango Juice - Fresh - Unsweetened (5080158)				Nov 14, 2007	
0000519	063008 Orange Juice Sample	Orange Juice (5081197)	East Side Facility	Jun 30, 2008	Jun 30, 2008	Jun 30, 2008	Jul 02, 2008
0000523	lm070808	Orange Juice (5081197)	East Side Facility	Jul 07, 2008	Jul 07, 2008	Jul 07, 2008	Jul 11, 2008
0000552	23443	Orange Juice - Concentrate (5080156)					

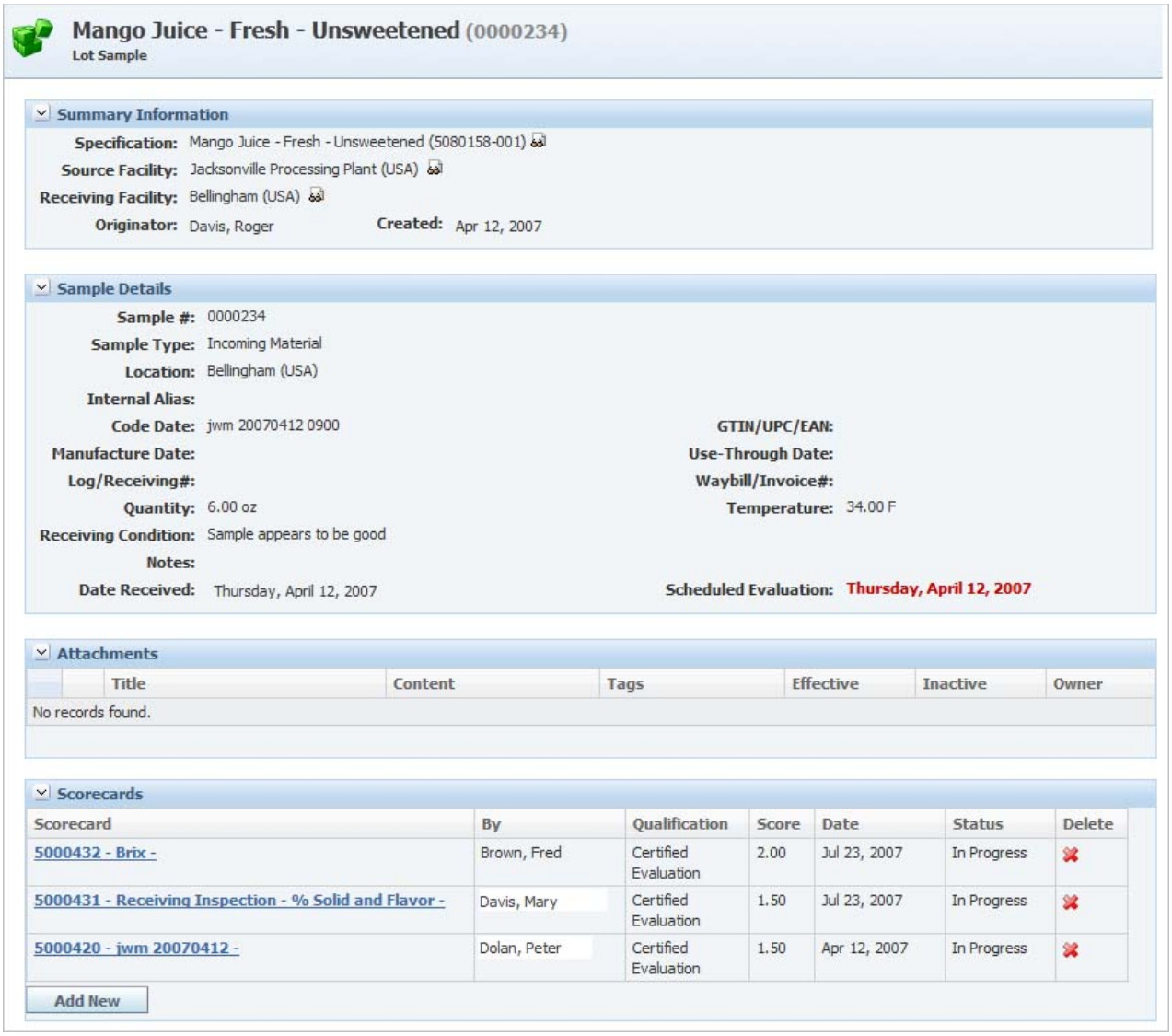
Refer to "Searching for a Session" on page 2-8 for more information on searching.

Click anywhere in a row 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.

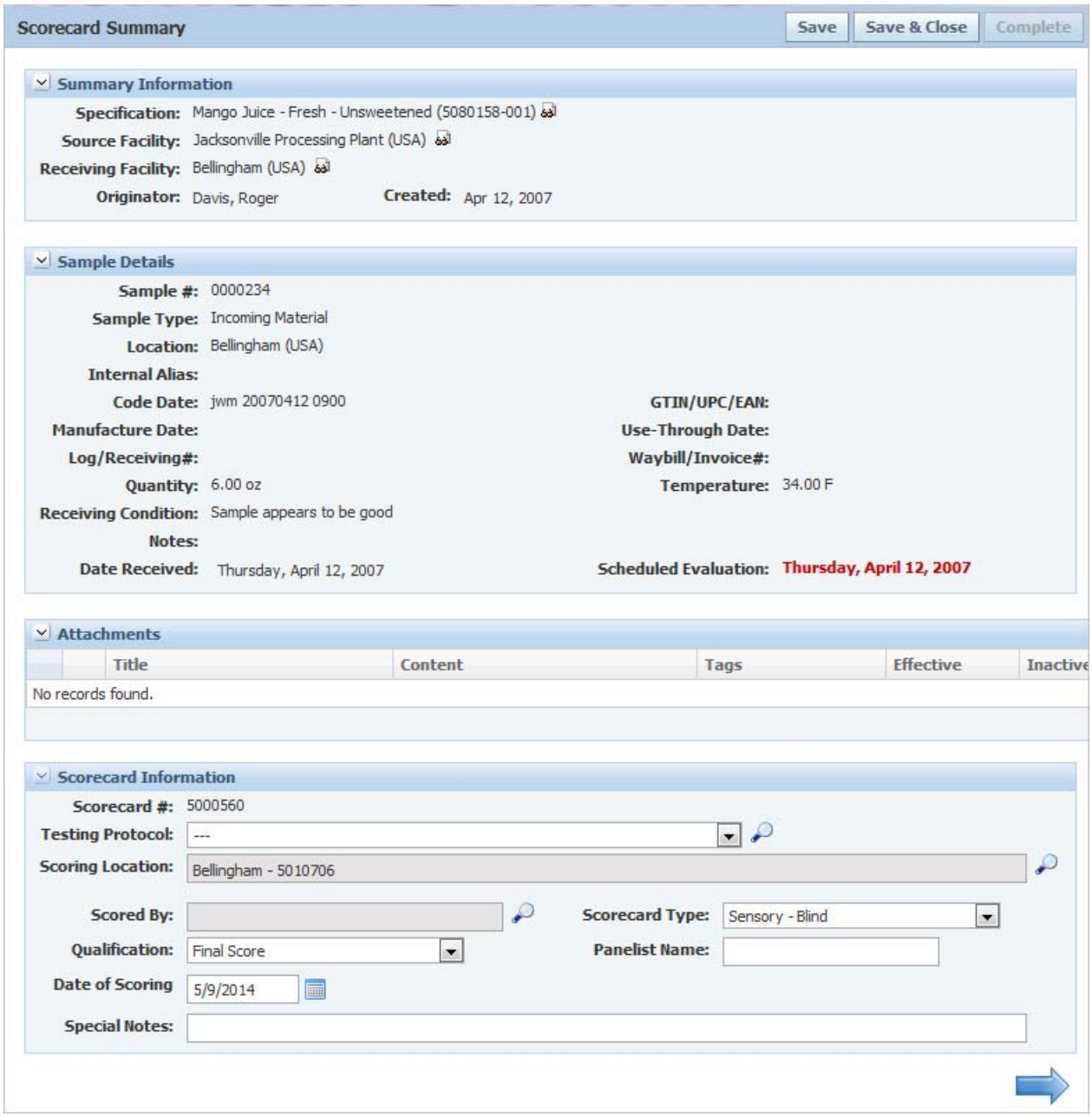
Figure 2–12 shows the Sample Summary page of the selected sample.

Figure 2–12 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 2–13.

Figure 2–13 Scorecard Summary page



The Scorecard Summary page consists of the following sections:

- Summary Information Section
- Sample Details Section
- Attachments Section
- Scorecard Information Section

Summary Information Section

The Summary Information section displays the core information about the session:

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

Sample Details Section

The Sample Details 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.

Attachments Section

The Attachments section lists all the attachments related to the sample.

Scorecard Information Section

The Scorecard Information section displays default information about how the sample will be tested.

Key fields include:

- **Scorecard #**—An auto generated unique identifier. This field cannot be changed.
- **Testing Protocol**—Pre populated with the default value if a testing protocol is defined for that specification in GSM. You can select another testing protocol using the search icon.
- **Scored By**—Use the search icon to 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 calendar icon 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 can see product and supplier details on this type of scorecard.

Testing Protocols

A testing protocol defines which tests are displayed on a scorecard. You can define testing protocols in Global Specification Management. Use them to create scorecards in the PQS application.

If you intend to use the testing protocol in PQS, then select **Qualitative** from the Record As drop-down list. 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 was 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*.