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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon ❓ to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon ❓ in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website at Oracle Accessibility Program.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction to Quality Management Cloud

Quality Management: Overview

Oracle’s Quality Management Cloud provides a unified platform for enabling quality visibility, collaboration, and execution.

The key focus of Oracle Quality Management is to:

1. Facilitate inspections at critical points throughout supply chain execution
2. Guide users through the quality issue resolution and corrective action process
3. Provide quality teams with enterprise level quality control and closed-loop quality management

The four key steps in Quality Management are: Define, Identify, Analyze, and Correct. The Define and Identify tasks together constitute Quality Inspection Management, while the Analyze and Correct tasks together constitute Quality Issues and Actions Management.

Quality Inspection Management

Quality Inspection Management enables you to:

1. Define quality requirements for both materials and resources, which has been implemented through the definition of:
   - Inspection Levels for Receiving
   - Inspection Characteristics
   - Work in Process Inspection Plans
   - Receiving Inspection Plans
   - Inventory Inspection Plans
   - Resource Inspection Plans

2. Allow users to perform inspections at key points in the supply process
   - In-line Work in Process Inspections
   - In-line Receiving Inspections
   - Ad-hoc Inventory Inspections
   - Ad-hoc Resource Inspections
   - Ad-hoc Work in Process Inspections

3. Allow users to analyze the results of inspections in order to identify failures or non-conformances. Infolets for Work in process Inspection Failures and Receiving Inspection Failures are available out of the box, and OTBI is available for ad-hoc reporting.

4. Allow users to leverage Oracle Social Network functionality to collaborate in defining requirements and to discuss quality inspection results.
Quality Issue and Action Management

Quality Issue and Action Management is a part of Quality Management Cloud that integrates with other Oracle Fusion applications to help you achieve closed loop quality: Primarily, it helps you:

- Identify nonconforming products and resources during the supply, manufacturing, storage, development, and shipping stages of a product lifecycle
- Link quality issues to corrective actions to change orders (in Oracle Product Development)
- View issues and actions in Oracle Product Development

Use the Quality Management landing page to view key quality metrics displayed in infolets, related to quality issues, quality actions, inspection plans, and inspection results, depending on your access privileges. Use this page to view issues and actions that are assigned to you. Unassigned issues are summarized in an infolet. A user can assign it to another user by changing the Assignee.

You can search for quality events or inspections data on the landing page, depending on your job role.

If you are accessing Quality Management Cloud as a quality analyst, a quick search requires only the number of the quality issue or quality action. Use Filtered search to look for quality issues or quality actions by any of their attributes, and save personalized searches to run them again.

Search results are filtered by the organization to which you are assigned. Click one of the entries in the search results to open the specific quality issue or quality action detail screen.
2 Quality Inspection Characteristics

Inspection Characteristics: Explained

Use inspection characteristics to specify the range of acceptable values or specification limits for items and non-items.

You use inspection characteristics to:

- Create inspection plans
- Conduct ad-hoc inspections, where you can directly add the characteristics to result collections
- Collect data

During inspections, you evaluate units against inspection characteristics. The samples or serials that are within the conformance limits are accepted and the rest are rejected.

Types of Inspection Characteristics: Explained

You can define item based and non-item based inspection characteristics.

Item Based Inspection Characteristics

You can link item-based inspection characteristics with attribute values in an item class. This enables you to verify if an item meets the required product specifications. The item based inspection characteristics generally have a range of acceptable values or specification limits, as well as target or optimal values.

Non-Item Based Inspection Characteristics

You can define inspection characteristics that are not mapped to item attribute values. These non-item inspection characteristics can be of type: Number, Character, or Date. You must specify a target value for all of the types, and where applicable, a range or list of valid values as well as a unit of measure.

You can use the non-item based inspection characteristics for both item and resource related inspections.

 Associating an Inspection Characteristic with a Characteristic Group: Explained

A characteristic group is a set of inspection characteristics. You may associate an inspection characteristic with one or more characteristic groups.

Characteristic groups are very useful to add a set of characteristics to an inspection plan or inspection result, at a time, without having to add them separately.
Updating Inspection Characteristics: Points to Consider

Consider these points while updating item based and non-item based inspection characteristics.

Updating an Item Based Inspection Characteristic

Here are some points to consider while updating an item based inspection characteristic:

- If the item inspection characteristic is not included in an inspection plan or if the inspection result value is not recorded against the characteristic, you can update all attributes of the inspection characteristic.
- If the characteristic type is either Date or Numeric and the item inspection characteristic is included in an inspection plan, or if the inspection result value has been recorded against the characteristic, then you can only update the Description, Enabled/Disabled, and Characteristic Group Association fields.
- If the characteristic type is Character and the item inspection characteristic is included in an inspection plan, or if the inspection result value has been recorded against the characteristic, then you can modify the Description, Enabled/Disabled, characteristic group association to the characteristic and Value List.

Updating a Non-Item Based Inspection Characteristic

Here are some points to consider while updating a non-item based inspection characteristic:

- If the non-item inspection characteristic is not included in an inspection plan or if the inspection result value has not been recorded against the characteristic, then you can update all attributes of the inspection characteristic.
- If the characteristic type is either Date or Numeric and the non-item inspection characteristic is included in an inspection plan, or if the inspection result value has been recorded against the characteristic, then you can only update the Description, Enabled/Disabled, and Characteristic Group Association fields.
- If the characteristic type is Character and the non-item inspection characteristic is included in an inspection plan, or if the inspection result value has been recorded against the characteristic, then you can modify the Description, Enabled/Disabled, Characteristic Group Association, and the Value List fields.
3 Quality Inspection Levels

Inspection Levels: Explained

An inspection level determines the relative amount and frequency of inspection. You create an inspection level and associate it with a Receiving inspection plan.

With inspection levels, you can determine if:

- All received units must be inspected or only a percentage of them
- All receipt lines must be inspected or if some can be skipped

Note: Except for the Receiving plan type, all other plan types only allow 100 percent inspection level. So, for Work in Process, Inventory, and Resource plan types you must inspect all the units, all of the time.

Related Topics
- Inspection Plans: Explained

Inspection Levels: Examples

You can define levels based on factors such as frequency of checks, complexity, item value, credibility of the supplier, acceptance history, and so on.

Scenario

For example, you can have three different levels: reduced, normal, and tightened inspection levels:

- Reduced inspection level: where fewer samples are required and less often, due to high level of confidence.
- Normal inspection level: will be the default inspection level, which will be widely used.
- Tightened inspection level: where more samples are required and more often, due to problematic suppliers or high value items.

Analysis

Inspection Levels ensures adherence to the quality standards and helps you make informed acceptance decisions.
Related Topics

• Inspection Plans: Explained
Quality Inspection Plans

Inspection Plans: Explained

An inspection plan contains inspection elements that represent the specific data that you want to collect and report on. It also contains information about when and how often you collect that data.

The following table lists the four types of inspection plans and their use:

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Used to Collect Data and Report On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving</td>
<td>Items received at the warehouse</td>
</tr>
<tr>
<td>Resource</td>
<td>Equipment or machinery in Shop Floor</td>
</tr>
<tr>
<td>Inventory</td>
<td>Items in your inventory</td>
</tr>
<tr>
<td>Work in Process</td>
<td>Work order execution</td>
</tr>
</tbody>
</table>

While creating an inspection plan, you must specify the plan details, specifications, and criteria.

You can specify target values and limits for inspection plan characteristics. If the actual results entered are not within the limits, a quality issue is automatically created.

Inspection Plan Details

Inspection Plan Details: Explained

Specify the plan details like the plan type, status, organization, and so on.
These plan details are useful to automatically match and associate a plan with an inspection.

Related Topics

- Ad Hoc and Inline Inspections: Overview

Plan Statuses: Explained

You can set the plan status to one of these statuses:
This table lists the various statuses available for the plan.
## Plan Status

<table>
<thead>
<tr>
<th>Plan Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>A plan that is not yet approved.</td>
</tr>
<tr>
<td>On hold</td>
<td>Put an approved plan on hold when you want to make it temporarily unusable.</td>
</tr>
<tr>
<td>Obsolete</td>
<td>You can make changes and approve the plan to use it again.</td>
</tr>
<tr>
<td>Approved</td>
<td>You cannot use or revive an obsolete plan. You can only use approved plans for inspections.</td>
</tr>
</tbody>
</table>

### Related Topics

- Ad Hoc and Inline Inspections: Overview

## Making a Plan Optional: Points to Consider

You can mark a plan as optional when you want to do ad hoc inspection. However, if you want to do inline inspections, you must not make a plan optional.

### Related Topics

- Ad Hoc and Inline Inspections: Overview

## How can I copy a plan?

Once you save a plan, you can copy and create a new plan. This is particularly helpful when you want to:

- Create a new plan with slight changes to an existing plan.
- Copy the same inspection plan to a different organization

To copy a plan, on the Create Inspection Plan page, from the Actions drop-down list, select Copy Plan.

## Inspection Plan Criteria: Explained

Specify inspection criterion for Receiving, Inventory, and Work in Process inspection plans. Based on the plan type, the inspection criteria can be as listed in the following table:

<table>
<thead>
<tr>
<th>Inspection Plan Type</th>
<th>Inspection Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving inspection plans</td>
<td>- Suppliers and supplier locations for the document type: Purchase order</td>
</tr>
<tr>
<td></td>
<td>- Source organization for document types: In-transit shipment, Return material authorization, and Transfer order</td>
</tr>
<tr>
<td>Inventory inspection plans</td>
<td>Subinventory and locators</td>
</tr>
</tbody>
</table>
### Inspection Plan Type | Inspection Criteria
---|---
Work in Process inspection plans | Operation Code or Operation Sequence or both along with the Dispatch Status

**Note:** You do not separately specify inspection criteria for Resource Inspection plans, as no additional criteria is required other than the information entered in the plan details.

**Related Topics**
- Ad Hoc and Inline Inspections: Overview

### Can I use multiple versions of the same inspection plan at the same time?

No. At any point of time, you can only use one version of a plan to do inspections.

When you create a new version, you specify a start date. If you have not specified an end date for the previous plan version, the previous version becomes obsolete a day before the new version’s start date. From the new version’s start date, you can start using it for new inspections.

### Inspection Plan Specifications: Explained

Add inspection characteristics or characteristic groups or both to specify the attributes of inspection. This also enables you to specify the measurements to be collected during an inspection.

For the Resource inspection plan, you can only add non-item inspection characteristics.

For other plans you can add both item and non-item inspection characteristics.
5 Quality Inspections

Ad Hoc and Inline Inspections: Overview

Based on the inspection plan type, you can perform an ad hoc inspection or inline inspection or both. The following table lists the plan types and the inspections they support:

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Supported Inspections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory</td>
<td>Ad hoc inspections</td>
</tr>
<tr>
<td>Resource</td>
<td>Ad hoc inspections</td>
</tr>
<tr>
<td>Receiving</td>
<td>Inline inspections</td>
</tr>
<tr>
<td>Work in Process</td>
<td>Both ad hoc inspections and inline inspections</td>
</tr>
</tbody>
</table>

Ad Hoc Inspections

Ad Hoc Inspections: Explained

Ad hoc inspections are also called as standalone inspections. You can do these inspections any time. With standalone inspections, you can collect inspection results without a parent transaction. For example, you can collect inspection results against a work order operation, resource, or an assembly in inventory.

Create ad hoc inspections for Inventory, Resource, and Work in Process inspection plans from either the Quality Management landing page or Work Execution landing page.

While creating an inspection:

- If there are one or more matching inspection plans, select a plan that you will use to collect the inspection results.
- If there is no matching plan, you must add the inspection characteristics for which the inspection results will be collected.

Even if a plan is available, you may choose not to use it, and instead add inspection characteristics for inspection. Also, even when you select a plan, you can add inspection characteristics as well. However, an issue gets created only for a measurement that is out of the specifications based on the values defined in the inspection plan.
Disposition Status on Ad Hoc Inspections

Inspection results collected in standalone inspections display the disposition information. However, no action is initiated as there is no parent transaction to implement the disposition. For example, no units are scrapped out of manufacturing and no units are rejected in inventory.

Performing Ad Hoc Inspections: Example

This example demonstrates how to:

• Create an inventory inspection
• Collect inspection data

Scenario

Consider a scenario where there is an inspection plan to associate with the inventory inspection. This means, during inspection, you will evaluate the inspection results against the inspection characteristics in a plan.

Prerequisites

• Create the required inspection characteristic configuration and characteristic groups (optional)
• An inspection plan that:
  o Is in "Approved" status
  o Is valid for the inspection date, that is the inspection date is between the start and end date of the plan
  o Matches the inspection details
  o Includes inspection characteristics or characteristic groups or both needed for the inspection

Creating an Inventory Inspection

1. Open the Inspections page from either the Quality Management landing page or Work Execution landing page.
2. Enter the inspection details: organization, type, item, subinventory, locator, and the quantity to inspect.
3. Based on the inventory details, if there are one or more plans with same values, they automatically appear in the Inspection Plan drop-down list. Select the applicable plan and click OK. The Enter Inspection Details page opens.

Note: It is not mandatory to select a plan. You can proceed even without selecting a plan.

Analysis

Collecting Inspection Results

On the Enter Inspection Details page, for each unit, enter the inspection result for each characteristic, and click Save. As soon as you enter results for all the units, the disposition status changes from Pending to Complete. If the inspection results are within the specification limits, the samples or serials are automatically accepted. Similarly, the samples or serials outside the specification limits are automatically rejected.
Note: If you have enabled Electronic Signatures and Electronic Records, you can submit the inspection disposition for approval. An E-Signature page opens where you can view the status of the approval process of the Inspection Disposition.

Inline Inspections

Inline Inspections: Explained

You can do inline inspections for the receiving and work in process transactions.
Based on the inspection results, units are automatically marked as either accepted or rejected.
For Receiving, you may inspect all units or choose to inspect only selected units using sampling and skip lot inspections. However, for Work in Process sampling is always 100%. So partial sampling and skip lot are not applicable.

Inspection Plans and Inline Inspections

You must have a matching inspection plan to do inline inspections. If a matching inspection plan is missing for an item, inspection of that item halts until you create and associate an approved matching inspection plan.

Sampling Inspections: Explained

In sampling inspections, a percentage of the total received units are available for inspection.
With sampling inspections:
- Even if one sample in the lot fails the inspection, the entire lot is rejected.
- Similarly, if the samples selected for inspection passes the inspection, the entire lot is accepted.

On the contrary, when sampling is not enabled, each individual unit is accepted and rejected separately.

Related Topics
- Skip Lot Inspections: Explained

Skip Lot and Sampling Inspections: Overview

You specify skip lot and sampling settings in an inspection level, and include that inspection level in an inspection plan.
When an inspection plan is leveraged to perform an in-line inspection, all the inspection level settings apply to that inspection. That is, in the inspection level if you have enabled:

- Skip lot, you can do skip lot inspections. That is, the skip lot plan or schedule defines the frequency or ratio of inspected lots and skipped lots.

- Sampling, you can do sampling inspections. That is, you inspect only a percentage of the total units, which will determine if the entire lot is accepted or rejected.

- Both skip lot and sampling, you can do both skip lot and sampling inspections.

Related Topics
- Skip Lot Inspections: Explained

Inline Inspection: Worked Example

This example demonstrates how to do inline sampling inspection for a receiving transaction.

Consider a scenario where you have ordered 30 units of an item from a supplier. You as the "Receiving Agent" want to check only 10 percent of the total units received, and decide if you can accept or reject all the units.

Prerequisites
- Create the required inspection characteristics and characteristic groups (optional).
- Create an inspection level with sampling set to 10 percent.
- An inspection plan that:
  - Is in "Approved" status
  - Is valid for the inspection date, that is the inspection date is between the start and end dates of the plan
  - Matches the receiving inspection details %
  - Includes inspection characteristics or characteristic groups or both needed for the inspection
  - Includes the inspection level with sampling set to 10
- Create a receiving inspection with the inspection plan having 10 % sampling inspection level.

Collecting Inspection Results
1. Login as the Receiving Agent.
2. On the Inventory Management page, in the panel drawer, click Inspect Receipts.
3. On the Inspect Receipts page, you may search with the receipt number. All the items matching the search criteria appears in the list.
4. Click Inspect. The Inspect Lines page opens.
5. Select the item and click Enter Quality Results. The Inspect page for the selected receipt number appears.
6. As 10 percent is the sampling inspection level, you will see three samples randomly selected from the total 30 received units.
7. Enter inspection results and click Save and Close. The Inspect Lines page opens again with inspection status of line as either accept or reject. That is, if all the samples pass the inspection, then all the 30 received units are accepted. However, even if one sample fails the inspection, all the 30 units are automatically rejected.
8. Finish inspection of other items and click Submit.

**Note:** If you have enabled Electronic Signatures and Electronic Records, only for an inline receiving inspection, you can submit the inspection disposition for approval. An E-Signature page opens where you can view the status of the approval process of the Inspection Disposition.

What happens if I remove lines from an inspection?

During inline inspections, there can be instances where you want to inspect one or more lines later, separately. For example, there can be a line without a matching inspection plan. As you cannot inspect a line without an associated inspection plan, you cannot proceed further. In this scenario, you can select that line and remove it from the inspection list. This allows you to proceed with inline inspection of other lines.

The status of the removed lines appears as pending.

How can I inspect a line that is already rejected in an inspection?

For work in process transactions there can be units, which initially fail the inspection, but can be reworked upon. Once they are reworked and ready for re-inspection, you can inspect them using the same or a different inspect plan. Based on the inspection results, you can either accept or reject them.

How can I inspect serial controlled items?

You can inspect serial controlled items during work in progress and inventory inspection. The inspection procedure for serials is same as it is for samples.

Electronic Signatures and Electronic Records for Quality Dispositions

**Electronic Signatures and Electronic Records for Quality Dispositions: Overview**

Capture electronic signatures and create electronic records for quality inspection dispositions when you do the following inspections:

- Ad hoc Inventory Inspection
- Ad hoc Resource Inspection
• Ad hoc Work in Process Inspection
• Inline Receiving Inspection

**Note:** You can capture electronic signatures and generate electronic records for Inline Work in Process Inspections during the Work Order Operation Transaction reporting in Manufacturing. For more information, see the Oracle SCM Cloud Using Manufacturing guide.

When you operate a business across different countries, you may choose to enable this feature for all your inventory organizations, or only certain inventory organizations where it is mandatory to maintain electronic records and electronic signatures.

To capture electronic signatures and create electronic records, do the following prerequisite steps:

1. Enable Inline Electronic Signature for each inventory organization.

   Navigation: Setup and Maintenance work area > Manufacturing Supply Chain and Materials Management Offering > Facilities functional area > Configure Electronic Signature Preferences. For more information on configuring e-signature preferences, see the Oracle SCM Cloud Implementing Manufacturing and Supply Chain Materials Management guide.

2. Configure the business process rules to determine the approvers for each transaction.

   Navigation: Setup and Maintenance work area > Manufacturing Supply Chain and Materials Management Offering > Manage Task Configurations for Supply Chain Management. On the BPM Work list page, configure the task: QAResultsERESHumanTask. For more information on Approval Groups, see the Oracle SCM Cloud Implementing Manufacturing and Supply Chain Materials Management guide.

**Capturing E-Signatures and Generating E-Records for Inspection Dispositions: Explained**

Once you enable inline electronic signature for the Quality Inspection Disposition, you can enter all inspection results and sign off the quality inspection disposition by submitting it for approval. An electronic record is generated and the E-Signature page opens where you can view the status of the approval process of the inspection disposition.

When you initiate the approval process, notifications are sent to all approvers. Approvers can view these in bell notifications and click the notification to view the e-record approval page, read the e-record, enter their comments, and approve or reject it.

**Note:** If the initiator is also an approver, the initiator’s signature is captured in the inline signature page. Notifications are sent to subsequent approvers to capture the remaining signatures. The new or updated transaction data remains in the pending status until all approvals are complete. You can refresh the E-Signature page to retrieve and view the latest status of the e-record.

You can search and view the existing e-records from the Electronic Records work area. For more information on the Electronic Records work area, see the Oracle SCM Cloud Using E-Signatures and E-Records guide.
6 Social Collaboration

Social Collaboration: Explained

You can communicate with key stakeholders in real time and in multiple threads. This ensures effective collaboration and efficiency across supply chain processes. Here are some examples of social collaboration.

- The product manager and production manager can collaborate with the quality engineer. This helps them to ensure that all quality requirements are considered in the development of an inspection plan.
- Similarly, if a non-conformance occurs in a manufacturing location, the production supervisor can reach out to managers in other facilities to check if they have the same problem.

Related Topics
- Ad Hoc and Inline Inspections: Overview
- Generating OTBI Reports: Explained
7 Generating OTBI Reports

Generating OTBI Reports: Explained

Generate Oracle Transactional Business Intelligence (OTBI) reports from inspection results to quickly view, analyze, and make informed decisions.

While generating a report, you may use one of the following as the report source:

- Data model
- Spreadsheet
- Subject area

For example, to analyze quality results, you can use the "Quality Inspection Results Real Time" subject area as source, and generate a report in the required layout with selected fields in it.

Related Topics

- Social Collaboration: Explained
- Ad Hoc and Inline Inspections: Overview
8 Quality Issues and Quality Actions: Purpose, Architecture, and Configuration

Working with Quality Issues: Explained

This topic discusses how you can create and manage quality issues to analyze problems in a controlled manner.

A quality issue is a defect, deficiency, or significant variation in a product’s expected appearance or performance. Oracle Quality Management Cloud can handle any type of quality issue, such as:

- Non-Conformance (Outside Processing, Item, Audit Finding, Inventory, Receiving, Resource, Work in Process)
- Design Failure (Item)
- Problem Report (Item, Supplier)

In the Quality Management work area, you can create a quality issue quickly with only essential information; use the quality issue edit page to add more information such as workflow, proposed disposition, and descriptions. Mark issues as favorites to find them easily later. Quality issue numbers are auto-generated and not configurable. They are already defined and cannot be changed.

To create a quality issue:

1. Select Quality Issue from the Create menu.
2. Select the type of quality issue you are creating from the Type menu.
3. Enter the name of the issue in the Name field. Use the Description field to describe the problem.
4. Search for the Organization from the Organization drop-down list.
5. Select the issue severity and the source of the issue.
6. Select the appropriate workflow to route the issue.
7. Save and close the issue.

After the quality issue is created, you can add affected objects. Affected objects can include Inventory Inspections, Resource Inspections, WIP Inspections, Resources, Work Areas, Work Centers, Work Order Operations, Receipts, and Items.

**Note:** The current Quality Issues Relationships information tile of affected objects allows you to search and add only items as affected objects, but on related objects you can add other object types as well.

Information tiles on the quality issue edit page summarize important data pertaining to the current quality issue, while helping you navigate between details, relationships, workflow, and similar issues.

- **Details:** Use this information tile to view the severity of the quality issue and the number of attachments it has. You can add attachments with URL, file, or text formats. Click the tile to access and configure all attributes of the current quality issue.

- **Relationships:** Use this information tile to view, add, and remove relevant affected objects and related objects. Related Objects can include business objects from Quality Management, Innovation Management, or Product Development.

- **Workflow:** Use this information tile to control the status of the quality issue and add approvers.

- **Similar Issues:** Use this infolet to analyze if you can resolve multiple, related issues together, and to avoid replicating any parallel efforts to resolve an issue. You can also identify trends in quality issues, which may be based on a broader problem and require more attention.
Quality issues that have the same affected objects as the current issue are automatically displayed here. Each time you update the quality issue with new affected objects, the Similar Issues information tile is refreshed. In the Similar Issues list, click any of the quality issues to view them in detail.

You can choose to duplicate any existing quality issue, even read-only quality issues, using the Save As option.

From the Actions drop-down list, you can create quality actions and change orders that link to the current quality issue you are working on, and that define how you intend to resolve the issue. The quality action will have the same affected objects and attachments as the quality issue from which it is created. The change order will automatically include a relationship link to the quality issue from which it is created.

You can extend issues/actions by adding additional attributes and business logic using data composer and page composer. Using the Manage Customizable Objects in the Data Composer Setup menu, you can create custom objects, such as quality action/quality issue. Using the Find Custom Attributes in the Page Composer, you can find the newly created custom objects.

Related Topics
- Define Document Sequences: Procedure

Creating and Routing a Quality Issue

Video

Watch: This video tutorial shows you how to create a quality issue and change its status in a workflow. The content of this video is also covered in text topics.

Procedure

Quality issues report variations or defects that occur in the performance of a product. This topic covers how you create and route a quality issue.

To create and route a quality issue:

1. Use Navigator and go to the Quality Management work area.
2. You can create several types of quality objects from the Create drop-down list. Select to create a quality issue of the problem report type, if the issue is related to a problem with an item.
3. Enter a name in the Name field and describe the problem briefly in the Description field.
4. Search for and find the appropriate organization where the issue occurred.
5. Select values in the Severity and Source fields.
6. Click the Workflow Information tile and select a workflow.
7. Click Save and Close. The issue opens to the General Information page.
8. Click open the Relationships Information tile and click the Affected Objects tab.
9. Click the Select and Add button.
10. Search for and add an affected object and click Done.
11. Click Save.

The Information tile refreshes to indicate the issue has an affected object.
12. To route the issue, click the **Change Status** button or the Workflow information tile. Select the change status icon to change the status.

### Adding Attachments to a Quality Issue: Procedure

Attachments aid in providing additional information to resolve the issue. Attachments can be in the form of files, text or URLs.

To add attachments to a quality issue:

1. Use **Navigator** and go to the **Quality Management** work area.
2. In the **Overview** page,
   - Search for quality issues, if you have saved any.
   - Click the **Favorites and Recent Items** icon to search for any favorite issues.
   - Create a quality issue from the **Create** drop-down list.

   The quality issue opens on the **General Information** page.
3. Click the Details Infotile.
4. Click the Attachments tab.
5. Click the **Add Attachments** button.
6. From the **Add Attachments** pane, select an **Attachment Type**, say Files, and a **Category** from the drop-down lists.
7. Click **Choose Files** and select the required file.
8. Click **Save**. Notice that the Details infotile shows an additional attachment. You have options to download the attachment, delete it or view its contents in detail.
9. Select the attachment row, and click the **Details** icon.
10. To replace the file, click the **Choose Files** button. Select the required file and click OK.
11. Click the **Update** button.

### Quality Issues and Inspection Results: How They Work Together

This topic describes how quality issues and inspection results impact each other in Quality Management.

A quality issue is automatically created for failures during in-line and ad-hoc inspections of inventory, resource, or work in process. This process facilitates the early identification of nonconforming components, and the required corrective actions to be taken.

Currently, a quality issue is created for each failed quality inspection result.

When quality issues are logged from Manufacturing or from Inspections, the impacted objects such as work order operations and receiving inspections are automatically added as Affected Objects to the Quality Issue.

### Defective Material in Receiving
A receiving agent can log a nonconformance quality issue for defective material, or an out-of-spec inspection result value generated during in-line or process Receiving inspections.

Production Exceptions in Manufacturing
A nonconformance quality issue is automatically logged for an out-of-spec inspection result value generated during in-line or process manufacturing inspections.

Working with Quality Actions: Explained
This topic describes how you can create and manage corrective and preventive quality actions.

A quality action is the necessary activity required to mitigate a quality issue and prevent its further occurrences. Quality Management Cloud provides a pre-seeded list of quality action types, which can be extended by an administrator. These types include:

- Corrective
- Preventive
- Supplier Corrective
- Development
- Design
- Manufacturing
- Audit Finding

In the Quality Management work area, you can create a quality action quickly with only essential information such as priority and workflow; use the quality action edit page to add more information such as affected objects, current status, and resolution date. Mark quality actions as favorites to find them easily later.

You can also create a quality action from a quality issue. Using the Actions menu, this process automatically links the quality action to the quality issue, and copies attachments and affected objects from the quality issue.

Information tiles on the quality action page summarize important data pertaining to the current quality action, while helping you navigate between details, relationships, and workflow.

- **Details**: Use this information tile to view general information about the quality action, including the priority and source of the quality action, and the number of attachments it has (attachment formats include URL/File/Text). Click the tile to access and configure all attributes of the current quality action.

- **Relationships**: Use this information tile to view, add, and remove relevant Affected Items and Related Objects. Affected items can include Inventory Inspections, Resource Inspections, Receiving Inspections, WIP Inspections ,Resources, Work Areas, Work Centers, Work Order Operations, Receipt, and Items.

  **Note:** The current Quality Actions Relationships information tile allows you to search and add only Items as Affected Items.

Related Objects can include business objects from Quality Management, Innovation Management, or Product Development.

- **Workflow**: Use this infolet to control the quality action status.
From the Actions menu, you can create change orders that link to the current quality action you are working on, to track the resolution of an issue.

Viewing Quality Issues and Quality Actions Graphically: Explained

This topic describes how to view affected objects and other related objects for quality issues and quality actions using the Graphical Navigator.

The Graphical Navigator is a read-only 360 degree view of all the relationships on a quality issue and quality action. Launch it from any quality issue or quality action, and click any object in the view for more details.

The graphical view consists of the Dependency Graph and Dependency Map.

- The dependency map allows you to map the data to visualization and configure possible interaction and visual properties. The dependency map appears in the Graphical Navigator window. The connector lines depict the different type of connections between the components. A thick line indicates an affected objects relationship. A dotted line indicates a related objects relationship.

- The dependency graph displays the visual cards related to the data and the relationship between the data. The dependency graph appears in the center of the Graphical Navigator window. In the dependency graph, when you hover over the visual card, the tooltip displays the name of the component. If the cursor is over the attribute of the component, then the tooltip displays the attribute.

You can also click the card to view more details, and directly access the Edit screen for some of the objects.

Relationships in Quality Events: Explained

This topic describes affected objects, related objects, and how quality issues and quality actions work with Innovation Management and Product Development.

Relationship Types

Relationship Types identify the purpose of the relationship. The related object is automatically set to the matching type.

Affected Objects

The affected objects screen provides a summary of all of the affected objects involved with a specific issue or action, and allows you to view details of the object. They provide very important additional insights into why something has happened. When quality issues are logged from Manufacturing or from Inspections, the affected objects are added automatically to the issue.

Related Objects

The Related Objects tab in the edit quality issue and edit quality action pages lists additional objects from Quality Management, Innovation Management, or Product Development, that provide more context about the current quality issue.
or action. It is the primary means of relating Quality Issues to Quality Actions and to Change Orders, which can be connected through Dependency Rules.

**Relationship Rules**

Use Relationship Rules or Dependency Rules to automatically advance one object in its workflow when a related object advances to its specific status. Relationship rules can close a quality issue upon the closure of its related quality action, or close a quality action upon implementation of a related change order.

**Workflows in Quality Issue and Action Management: Explained**

This topic describes how workflows ensure a standard and repeatable process for managing quality issues and quality actions.

A workflow is a sequence of steps that a quality issue or quality action follows as it goes through a business process.

**Workflow Templates**

When you create or edit a quality event, select a predefined Workflow template. Workflow templates have a predefined sequence of statuses and approval steps. On initiating a workflow, the quality issue or action is moved to either the next or previous status, based on the sequence of the statuses. Relationships can tie objects together based on their workflow statuses. One related object can automatically advance in its workflow when the other related object advances. Upon reaching certain statuses or upon approval or rejection, notifications are sent out automatically to involved approvers, creators and assignees.

**Workflow Status**

Quality teams and interested parties can track the progress of a quality event through its workflow status. You cannot edit the quality event when it’s in a read-only state like Approval or Closed.

The workflow of a quality issue is based on how it's used. A quality issue workflow can be any of the following:

- an issue expedite workflow
- issue workflow with review
- issue workflow with approval
- issue resolution
- issue exception
- issue workflow with preapproval and approval.
The figure shows the workflow statuses of quality issues, based on usage.

The workflow of a quality action is also based on how it’s used. A quality action workflow can be any of the following:

- an action expedite workflow
- action workflow with review
- action workflow with approval
- CAPA workflow
- action with preapproval and approval workflow
- 8D workflow.
The figure shows the workflow statuses of quality actions, based on usage.

Approvals and Notifications

Workflows help you route notifications to the approvers, and document their feedback. For quality objects, you cannot configure default approvers, but you can add approvers manually as you advance the object through its workflow.
Quality Issues, Quality Actions, and Change Orders: How They Work Together

This topic describes how quality issues, quality actions, and change orders work together.

Quality Issues and Quality Actions
You can create and relate a new quality action from a quality issue. This action copies over the affected objects, attachments, and some attributes. You can quickly launch a quality action and resolve the issue.

You can create relationship rules from quality actions for related quality issues.

Change Orders
You can create and relate a new change order in Product Development from a quality issue or quality action. This action provides a seamless approach for quality and research teams to work together to manage the change order and resolve the impacted quality issues. You can create relationship rules from change orders for related quality actions.

Related Topics
- Change Order Relationships: Explained

Creating a Change Order from a Quality Action

Video

Watch: This video tutorial shows you how to create a change order from a quality action and add an affected object. The content of this video is also covered in text topics.

Procedure
You can create change orders in several ways. This topic covers how to create a change order from a quality action.

To create a change order from a quality action:

1. Use Navigator and go to the Quality Management work area.
2. Search for and open a quality action. From the Actions menu, select Create a Change Order. Alternatively, open a quality action from the Favorites menu if it’s marked as a favorite.

Note: If you mark an object as a favorite, you can use the Favorites list to find it easily.
3. Select a change order type from the drop-down list.
4. Fill in the **Number**, **Name**, and **Description** fields and click **Save and Edit**.

The change order appears as a related object on the Relationships infotile of the quality action.

5. Open the change order and add the item causing the issue as an affected object. Mark or redline changes to the item. Redlining is the process of modifying a product structure using a change order.

6. Click **Save and Edit**.

7. Click the change order and go to the **Relationships** tab. Click the **Select and Add** button to create a rule. A relationship rule moves an object automatically to the next status of the workflow, when a related object advances to its specified status. In the window that opens, set a rule to close the quality action on completion of the related change order.

---

**Creating a Quality Action from a Quality Issue**

**Video**

![Watch](image)

**Watch:** This video tutorial shows you how to create a quality action, and set a relationship rule between quality action and quality issue. The content of this video is also covered in text topics.

**Procedure**

When you create a quality action from a quality issue, the action is automatically linked to the issue. The quality action helps to correct and prevent future occurrences of the issue. If a quality issue cannot be resolved quickly, use a quality action to conduct a more thorough investigation of the problem and a possible resolution. This topic covers how to create a quality action from a quality issue.

To create a quality action from a quality issue:

1. Use **Navigator** to open the **Quality Management** work area.
2. Create a quality issue, open an existing issue or select from the **Favorites** list.

   **Note:** If you mark an object as a favorite, you can use the Favorites list to find it easily.

3. From the **Actions** list of the issue, select **Create Quality Action**.
4. Depending on the type of action you want to perform, select a **Type**.
5. Fill in the **Name** and **Description** fields.
6. Select a workflow.
7. Click **Save and Close**.
8. Click the Relationships Information tile. In the **Affected Objects** tab, the item on the quality issue is automatically added as an affected object. Attachments, if any, are also copied to the quality action.
9. Go to the **Relationships** tab and note that the quality issue appears as a related object.
10. Click the **Add** icon of the quality issue in the Related Objects tab. A relationship rule between the issue and action is created, such that when the issue is closed, the action is closed automatically.
11. Click **Save**.
12. To advance the action to the next status in the workflow, click the **Change Status** button.
How do I exchange information with design and manufacturing teams on a quality event?

Use Oracle Social Network to easily start a discussion with internal and external participants on a quality issue or quality action. The issue and action data is copied into the conversation automatically to provide context. You can then collaborate in real time and in multiple threads with key stakeholders to help resolve quality events. For instance, a quality analyst can collaborate with a production supervisor to determine exact details related to the assembly of a failed part, and if needed the analyst can reach out to other production facilities (maybe even external manufacturers) to get a second opinion on the problem.
9 Quality Issues and Quality Actions: Setup and Configuration

Quality Event Lookup Values: Explained

This topic describes how to set up quality issues and quality actions lookup values in the Setup and Maintenance work area. The Setup and Maintenance work area provides tasks for configuring and enabling modules in Oracle Cloud Applications. In Setup and Maintenance, search for the Manage Quality Issue and Action Lookups task. The Manage Quality Issue and Action Lookups task requires the Setup Product Quality privilege, which is part of the Application Implementation Consultant role.

Lookup types with the configuration level **System** do not allow you to add or delete lookup codes. However, you can edit the **Meaning** and **Description** fields of the existing lookup codes. The following lookup types exist but are not used.

1. `ORA_ENQ_ASSOCIATION_TYPE`
2. `ORA_ENQ_AFFECTED_OBJECT_TYPE`

The following table details the lookups available in Quality Management.

<table>
<thead>
<tr>
<th>Module</th>
<th>Lookup Type</th>
<th>Lookup Code Meaning</th>
<th>Description</th>
<th>Configuration Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issues</td>
<td><code>ORA_ENQ_DISPOSITION</code></td>
<td>Quality Disposition Type</td>
<td>The various designations or classifications that are available for you to assign to a quality issue in order to resolve the issue.</td>
<td>User</td>
</tr>
<tr>
<td>Issues</td>
<td><code>ORA_ENQ_SEVERITY</code></td>
<td>Quality Issue Severity</td>
<td>The level or degree of the quality issue in order for you to prioritize when and how to resolve the issue.</td>
<td>User</td>
</tr>
<tr>
<td>Actions</td>
<td><code>ORA_ENQ_PRIORITY</code></td>
<td>Quality Action Priority</td>
<td>The rank of the quality action to decide when and how to resolve an issue.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td><code>ORA_ENQ_AFFECTED_OBJECT_STATUS</code></td>
<td>Affected Object Status</td>
<td>The possible stages to set for an affected object.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td><code>ORA_ENQ_IMPACT_TYPE</code></td>
<td>Affected Object Quality Issue Impact Type</td>
<td>The level of involvement that the quality issue or action affects the object.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td><code>ORA_ENQLIKELY_OF_RECURNCE</code></td>
<td>Likelihood of recurrence</td>
<td>The level of likelihood of recurrence of the quality issues and actions.</td>
<td>User</td>
</tr>
</tbody>
</table>
Job Roles and Team Security in Quality Issues and Action Management: Explained

This topic discusses job roles and team security in Quality Management. The following table lists and describes the key user roles in Quality Management.

<table>
<thead>
<tr>
<th>Role</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality Analyst</td>
<td>Create and manage quality issues and quality actions</td>
</tr>
<tr>
<td>Application Implementation Consultant</td>
<td>• Create new quality issue and quality action types</td>
</tr>
<tr>
<td></td>
<td>• Create and manage customers</td>
</tr>
<tr>
<td></td>
<td>• Create and manage inventory organizations</td>
</tr>
<tr>
<td>Supplier Manager</td>
<td>Create and manage suppliers</td>
</tr>
</tbody>
</table>
How do I update customer information in Quality Management Cloud??

You must have administrator rights to work with customer data. On the Oracle Cloud Applications Welcome page, click the Navigator and select Setup and Maintenance.

- To create a new customer, search for the Create Customer task and run it.
- To update information about a customer, search for the Manage Customers task and run it.

How do I manage organizations in quality management Cloud?

Using the Manage Inventory Organizations setup task, you can create and maintain organizations. The Application Implementation Consultant role permits you to access this setup task. Ensure access to listed organizations when creating a quality issue. Run the Manage Data Access for Users task in the Setup and Maintenance work area.

Based on their job roles, users are assigned access to specific security contexts that affect their visibility of data.

Related Topics

- Managing Data Access for Users: Explained
- Assigning Data Access to Users: Worked Example
Glossary

**inspection**
The process of measuring and testing characteristics and collecting results for a product or process to determine conformance to quality requirements.

**inspection characteristic**
A property, measurement, or test that describes and differentiates a product or process.

**inspection characteristic group**
A set of inspection characteristics. Examples include visual, mechanical, and electrical.

**inspection criteria**
Conditions that describe when and where inspection should be enforced.

**inspection disposition**
The status of inspection based on the testing and disposition of all samples or serial numbers in the inspection.

**inspection level**
A combination of the relative amount and frequency of inspection based on sampling and skip lot inspection requirements.

**inspection plan**
Defines the quality standards for a product or process, including the specifications, requirements, and conditions for inspection.

**inspection result**
Actual result collected from quality inspection.

**nonconformance**
An occurrence in which the quality requirements were not met.

**quality action**
The process and information collection for proactively avoiding and responding to a quality incident. Examples include Corrective and Preventative Action, and Supplier Corrective Action Request (SCAR).

**quality issue**
The business process and information collection related to quality incidents. Types of issues commonly include nonconformance, problem reports, and exceptions.
**sample**
A quantity of material drawn for the purposes of inspection.

**sample disposition**
The status of inspection for a sample and its determination of accepted or rejected based on the evaluation of inspection results against the specification requirements.

**sampling inspection**
A procedure in which one or more samples are drawn for inspection to determine acceptability.

**specifications**
A statement of requirements for quality conformance of a product or process.