

Agile Product Lifecycle Management

Product Quality Management User Guide

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Glossary

Preface

Agile PLM is a comprehensive enterprise PLM solution for managing your product value chain.

Audience

This document is intended for administrators and users of the Agile PLM products.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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Related Documents

Oracle's Agile PLM documentation set includes Adobe® Acrobat PDF files. The Oracle Technology Network (OTN) Web site <http://www.oracle.com/technetwork/documentation/agile-085940.html> contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

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.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Product Quality Management Overview

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

An Overview

As alternate quality management packages enter the market, customers demand quality products at a lower cost, and a reduced product lifecycle. Quality incidents reported by the customers help you detect defects and resolve them responsively. Tracking defects and finding the root cause of the defects quickly are keys to effective defect reduction and improving product quality. The Agile PQM solution includes Product Service Requests (PSRs) and Quality Change requests (QCRs). PSRs manage Problem reports and non-Conformance Reports. QCRs create and manage Audits, and Corrective and Preventive Actions (CAPAs).

Before you Begin

Before you begin using FileLoad, make sure you have set up your environment correctly and have proper privileges described in this section.

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

- *Agile Database Installation Guide*
- *Agile PLM Guide for WebLogic*
- *Getting Started with Agile Product Lifecycle Management*
- *Agile PLM Administrator Guide*

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

Best Practices in PQM

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

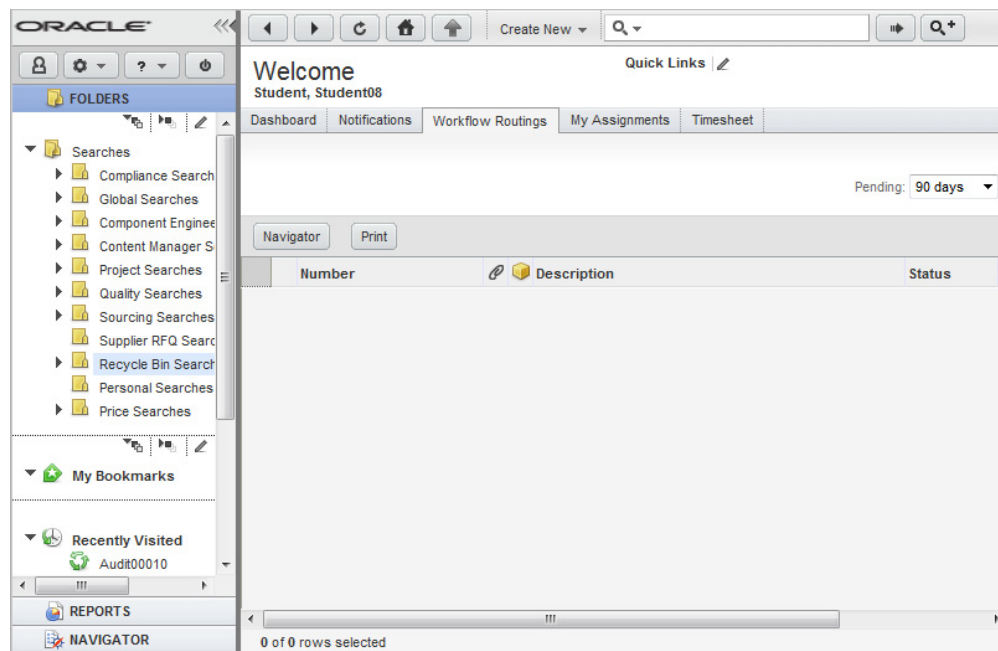
- **Problem Reports**
 - Use Problem Reports class to capture Customer complaints.
 - Do not use PRs to capture non-conformance issues.
 - A Customer complaint may result in a CAPA in companies that have closed loop process. Use the Relationship functionality in PLM to tie the specific Customer complaint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

Web Client Home Page

When you log in, your user Home page appears (Welcome <Your Name>”).

Your Preferred Start Page setting determines which tab is displayed in the content pane. The following illustration shows a typical Home page.

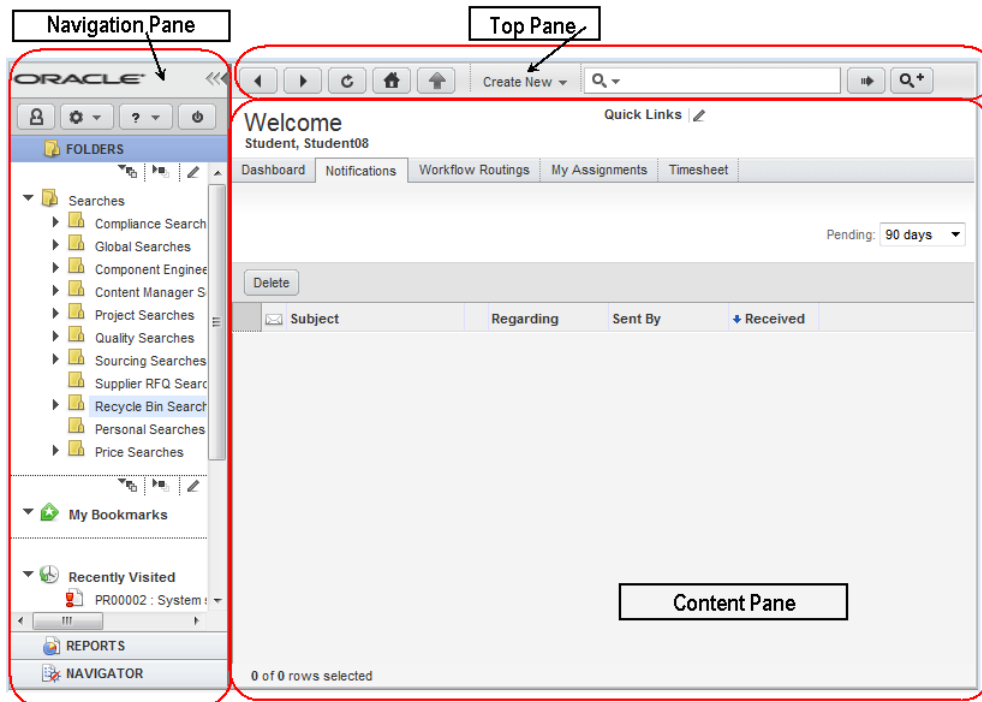
Figure 1–1 Home Page



The Web Client window is organized into three main areas, or panes:

- **Top Pane**
 - Navigation controls (Back, Forward, Refresh, Home, Display the progress of file uploads)
 - Create Menu
 - Search Controls
- **Navigation Pane**
 - Branding Area and Navigation pane, Expand and Collapse controls
 - Courtesy Controls
 - Navigation Drawers
 - Folders drawer: Saved Searches, My Bookmarks, and Recently Visited
 - Reports drawer: Reports and Analytics
 - Navigator drawer: object links from Workflow Routings, search results table, BOM tree, or Project tree
- **Content Pane**
 - Business objects tabular data is displayed in the content pane.
 - The Home page at login and when you click the Home button.

Figure 1–2 Panes in Detail



Navigation Pane

The left pane, called the navigation pane, provides basic access to settings, searches, reports, and the Agile PLM Navigator feature:

- Logo area, which includes the navigation pane Collapse and Expand controls.
- Navigation Pane toolbar.
- Navigation pane drawers, which provide access to:
 - FOLDERS -- Search folder, My Bookmarks folder, Recently Visited list.
 - REPORTS -- Analytics, Standard Reports, Global Reports, Personal Reports.
 - NAVIGATOR -- Workflow Routings, Search results, item BOM tree, or PPM Project tree.

Folders

The FOLDERS drawer displays saved searches, bookmarks, and a list of recently visited objects.

The Searches section of the navigation pane FOLDERS drawer contains saved searches you can use whenever needed. It includes predefined system searches and searches you have created, stored in folders. Click a search to view the search results.

For more information about saved searches, see the chapter, 'Saved Searches' in *Getting Started with Agile Product Lifecycle Management*.

Beneath the search folders are two shortcuts areas:

- **My Bookmarks**-Objects you have bookmarked for quick display later. To bookmark an object, choose Actions > Bookmark on an object's page. For more

information about bookmarking, see the chapter 'Using and Organizing Bookmarks' in *Getting Started with Agile PLM*.

- **Recently Visited**-The last 10 objects you have viewed (or 25, 50, or 100, depending on how the Agile administrator has defined the Agile PLM system preferences); click a link to display it in the content pane.

Reports and Analytics

The left navigation pane REPORTS drawer gives you access to the Reports and Analytics folders. You can access the types of reports for which you have privileges-and Analytics folders if that is part of your Agile installation. You can view, edit, and delete existing reports.

Navigator

When you click a Navigator button in the content pane, Agile PLM populates the Navigator drawer with a list of object links. As you click each link in the Navigator drawer, the object is displayed in the content pane. The list in the navigator drawer is not refreshed or updated as you click through the list.

Populate the navigator list by clicking the Navigator button in the following locations:

- Workflow Routings tab on the Home page, to navigate your workflow tasks

When the Workflow Routings tab is displayed on the Home page, click the Navigator button on the Workflow Routings tab. The workflow routings list is displayed in the left navigation pane Navigator drawer.

- Search results table, to navigate the list of search results.

When a search results table is displayed on the content page, click the Navigator button on the search results table. The list of search results is displayed in the left navigation pane Navigator drawer.

The Navigator button is added to the tool bar of the PSR and QCR objects. When you click a link in the Navigator drawer, the object is displayed in the content pane. The navigator list remains visible in the Navigator drawer, allowing you to click and view any object in the navigator list.

For more details, see *Getting Started with Product Lifecycle Management*.

For more navigation tips and shortcuts, see the recorded demos under Tools & Settings > Quick Tours.

Product Service Requests

Product Service Requests report quality incidents, and aggregate many PSRs to a single PSR. The PSR class includes Problem Reports (PRs) and Non-Conformance Reports (NCRs).

For details, see [Chapter 2, "Working with Product Service Requests"](#)

Problem Reports

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

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

Non-Conformance Reports

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

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

Quality Change Requests

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

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

You can use QCRs to:

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

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

For details, see [Chapter 3, "Working with Quality Change Requests"](#)

Audits

An Audit is a pro-active process of verifying compliance with quality requirements. Default Audit workflows are different from CAPA workflows.

Corrective and Preventive Actions

Corrective and preventive actions (CAPAs) address generic quality problems for one or more PSRs. A CAPA could result in the creation of one or more changes that lead to

fixing the problems. A CAPA is a routable object and a workflow controls it. CAPA workflows vary for different workflow statuses.

For details, see "[Workflow Tab of a QCR](#)" on page 8.

Tracking Quality

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

Quality Roles

Product Quality Management provides these roles:

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

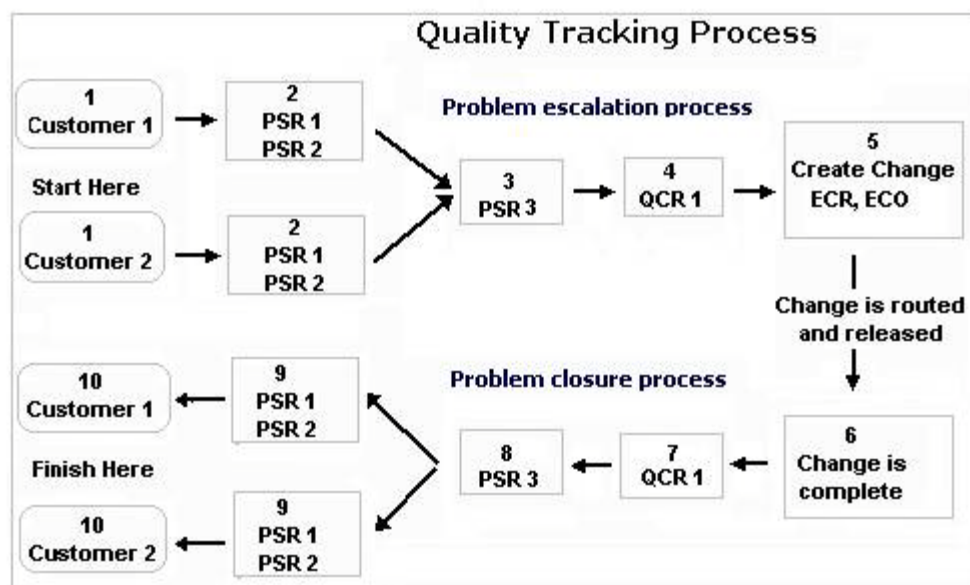
Quality Administrator - The role of a Quality Administrator enables you to manage Audits and CAPAs.

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

Quality Process

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

Figure 1-3 Quality Tracking Process



1. Two customers report quality incidents. Customer 1 and Customer 2. The support division creates problem service requests (PSRs) for the reported incidents.
2. PSR-1, PSR-2, for Customer PSR-1, PSR-2, for Customer 2. Submits PSRs to the Quality Analyst, who reviews all the PSRs.

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

Quality Related SmartRules

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

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

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

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

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

Quality Searches

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

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

- Unassigned Submitted QCRs
- Open QCRs

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

Quality Tab

You can link Quality information on certain tabs and fields with information about objects such as items, customers, and suppliers. The organization can then assess the quality of incorporating certain parts into their designs. The fields of the PSR and QCR table are the same as that of Parts and are also available to Searches and Reports. A round black icon in the Quality tab indicates it contains a QCR or PSR. The Quality tab on Items, Customer and Supplier is visible only in Web Client.

The **Quality** tab for Items displays all PSRs and QCRs reported against that Item.

The **Quality** tab of a Customer object lists both PSRs and QCRs. The quality incidents reported by the customer helps you gauge customer satisfaction.

The **Quality** tab of a Supplier object lists both PSRs and QCRs. The quality incidents filed against the supplier help you gauge performance and you can establish a rating or preference for that supplier.

Viewing Quality Issues against Suppliers and Customers

Listed below are several ways you can view Quality issues against Customers or Suppliers.

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

Quality Reports

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

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

- ["Failure Trend Report"](#) on page 1-10.
- ["Quality Activity Report"](#) on page 1-11.

- ["Quality Backlog Report"](#) on page 1-12.
- ["Quality Cycle Time Report"](#) on page 1-13.
- ["Quality Metrics Report"](#) on page 1-14.

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

A Quality Report includes the following tabs:

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

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

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

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

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

For more details on the tabs of Quality Reports, see *Getting Started with Agile Product Lifecycle Management*.

Failure Trend Report

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

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

To run a Failure Report Trend:

1. In the navigation pane, navigate to Reports > Reports and Analytics > Standard Reports > Quality Reports > Failure Trend Report.
2. Click the Execute button. A Run Failure Trend Report wizard opens.
3. In the Select Layout and Configuration page, select a Layout from the list. You can click the Edit button to modify an existing layout or click the Create button to create a layout.
 - In the Format Frame, select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows. Click the Edit button to modify an existing layout.
 - In the Properties frame, enter the required fields.
 - Click Save to save the changes or Close to close the palette.
4. Select a format for the generated report from the Output Format list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
5. Select the Save a copy of the report in the historical reports check box to save the generated report.

6. Click Next.
7. The Select or Create a Query page appears. The Failure Trend Report lets you search for Product Service Requests to use in the report and fields you must select to define a query.
8. Click Next to proceed to the next step or Back to edit the Query.
9. The Define Report page appears.
 - In the Time Period frame, fill in the necessary fields.
 - In the Additional Report Criteria frame, select the required fields.
10. Click Finish to display the report.
11. Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the Close button, without saving it.
 - **Save:** Saves the report to the Historical Report tab.
 - **Print:** Prints the generated report.
 - **Export:** Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

Quality Activity Report

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

To run a Quality Activity Report:

1. In the navigation pane, navigate to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Activity Report.
2. Click the Execute button. A Quality Activity Report wizard opens.
3. In the Select Layout and Configuration page, select a Layout from the list. You can click the Edit button to modify an existing layout or click the Create button to create a layout.
 - In the Format Frame, select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows. Click the Edit button to modify an existing layout.
 - In the Properties frame, enter the required fields.
 - Click Save to save the changes or Close to close the palette.
4. Select a format for the generated report from the Output Format list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
5. Select the Save a copy of the report in the historical reports check box to save the generated report.
6. Click Next.
7. The Select Date Range Page appears. Select the required dates.
8. Click Next.
9. The Select Additional Parameters page appears. In the Workflow and Status Change Criteria frame,
 - Select a workflow from the Workflow Type list.

- Click the Search palette to effect a change in the Status Changes to field. A Change palette appears. Select and double-click the item to move it to the Status Changes to field.
10. Click Finish to display the report.
 11. Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the Close button without saving it
 - **Save:** Saves the report to the Historical Report tab.
 - **Print:** Prints the generated report.
 - **Export:** Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

Quality Backlog Report

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

To run a Quality Backlog Report:

1. In the navigation pane, go to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Backlog Report.
2. Click the Execute button. A Quality Backlog Report wizard opens.
3. In the Select Layout Configuration page, select a Layout from the list. You can click the Edit button to modify an existing layout or click the Create button to create a layout.
 - In the Format Frame, select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows. Click the Edit button to modify an existing layout.
 - In the Properties frame, enter the required fields.
 - Click Save to save the changes or Close to close the palette.
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5. Select the Save a copy of the report in the historical reports check box to save the generated report.
6. Click Next.
7. The Select or Create a Query frame appears. The Quality Backlog Report lets you search for Product Service Requests to use in the report and fields you must select to define a query.
8. Click Next to proceed to the next step or Back to modify the Query.
9. The Define Report page appears.
 - In the Time period frame, select the dates.
 - In the Additional Report Criteria frame, fill in the required fields.
10. Click Finish to display the report.
11. Define Click the buttons that appear at the top of the generated report to save, print, or export the report.
 - **Save:** Saves the report to the Historical Report tab.

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

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

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

To run a Quality Cycle Time Report:

1. In the navigation pane, go to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Cycle Time Report.
2. Click Execute. A Quality Cycle Time Report wizard appears.
3. In the Select Layout Configuration page, select a Layout from the list. You can click the Edit button to modify an existing layout or click the Create button to create a layout.
 - In the Format Frame, select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows. Click the Edit button to modify an existing layout.
 - In the Properties frame, enter the required fields.
 - Click Save to save the changes or Close to close the palette.
4. Select a format for the generated report from the Output Format list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
5. Select the Save a copy of the report in the historical reports check box to save the generated report. The Save a copy of the report in the historical reports check box does not appear if you select the Standard output format
6. Click Next.
7. The Select or Create a Query frame appears. The Quality Backlog Report lets you search for Product Service Requests to use in the report and fields you must select to define a query.
8. Click Next to proceed to the next step or Back to modify the Query.
9. Click Next.
10. In the Define Report page appears.
 - In the Time Period frame, select the required dates.
 - In the Status change frame, select the required status.
 - In the Report Additional Criteria, fill in the required fields.
11. Click Finish to display the report
12. Click the buttons that appear at the top of the generated report to save, print or export the report. The report is lost if you click the Close button without saving it.
 - **Save:** Saves the report to the Historical Report tab.
 - **Print:** Prints the generated report.

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

Quality Metrics Report

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

To run a Quality Metrics Report:

1. In the navigation pane, go to Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Backlog Report.
2. Click the Execute button. A Run Quality Metrics Report wizard opens.
3. In the Select Layout Configuration page, select a Layout from the list. You can click the Edit button to modify an existing layout or click the Create button to create a layout.
 - In the Format Frame, select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. You can also place them in the required ascending or descending order using arrows. Click the Edit button to modify an existing layout.
 - In the Properties frame, enter the required fields.
 - Click Save to save the changes or Close to close the palette.
4. Select a format for the generated report from the Output Format list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
5. Select the Save a copy of the report in the historical reports check box to save the generated report. The Save a copy of the report in the historical reports check box does not appear if you select the Standard output format.
6. Click Next.
7. The Select or Create a Query page appears. The Quality Metrics Report lets you search for Product Service Requests to use in the report and fields you must select to define a query.
8. Click Define Query. A Report Search palette opens. Select required fields.
9. Click Next to proceed to the next step or Back to modify the Query.
10. The Define Reports page appears.
 - In the **Time Period** frame, fill in the dates.
 - In the **Status Change** frame, fill in the required details.
 - In the **Additional Report Criteria** frame, fill in the required fields.
11. Click **Finish** to display the report.
12. Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the **Close** button without saving it.
 - **Save:** Saves the report to the Historical Report tab.
 - **Print:** Prints the generated report.
 - **Export:** Exports the content of the report to a delimited text file (CSV) or a Microsoft Excel workbook.

Working with Product Service Requests

Product Service Requests (PSRs) report quality issues. A PSR can either be a Problem Report or a Non-Conformance Report. PRs report generic quality incidents and NCRs report material deviations from specifications and other specific quality issues.

Creating PSRs

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

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

Creating a Product Service Request

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

To create a PSR in Java Client:

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

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

To create a PSR in Agile Web Client:

1. Launch Agile Web Client.
2. On the main tool bar click the Create New menu.
3. Select Product Service Requests> Problem Report or Non-Conformance Report from the drop-down menu. The Create New dialog appears.
4. Select a required subclass (NCR or Problem Report) from the Type list.

5. In the PSR Number field, accept the default number, enter a number, or click Autonumber button to generate a new number.
6. Click Save.

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

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

To assign a workflow to the PSR:

1. Open a PSR and click the Edit button.
2. Select a workflow from the Workflow list.
3. Click Save.

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

Creating a PSR from an Item

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

To create a PSR from an item in Java Client:

1. Open an Item from which you want to create a PSR.
2. Select Create New Product Service Requests from the Actions menu.
3. In the New dialog:
 - Choose the desired subclass (NCR or Problem Report) from the Type list.
 - PSR Number field, accept the default number, enter a number, or click the Autonumber button to generate a new number.
 - Choose a Quality Analyst from the list.
 - Click OK. Agile Java Client creates the PSR and displays it with the Cover Page tab on top in the edit mode.
4. Enter values in relevant fields on the Cover Page tab.
5. Click Save to save the changes.

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

To create a PSR from an item in Web Client:

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

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

Creating a PSR to Aggregate Multiple PSRs

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

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

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

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

1. Open a PSR you want to use as the basis for a new PSR or choose File > Save As or right click and choose Save As to.

See also: "[Creating a PSR using Save As](#)" on page 2-4.

2. The PSR opens with the Cover Page in the edit mode. On the Affected Items tab, do not add any items. On the Related PSR tab, add related PSRs.
3. Click Add to add related PSRs.

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

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

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

After you add related PSRs to the Parent PSR, the Aggregate PSR Number column for each PSR on the Related PSR tab displays the number of the parent PSR. On the Cover Page of the child PSRs, the parent PSR number appears in Aggregate PSR Number field, automatically.

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

Field	Completes	Indicates
PSR Result	Manually	<p>The status to which you promote the related PSRs to, when it reaches the Event status.</p> <p>When the Parent PSR reaches the specified status in the PSR event field, the status of the Related PSR moves to the specified result in this field.</p> <p>Only if you assign a workflow to both objects (parent and child) on the Cover Page, can you specify the PSR Event status.</p>

Creating a PSR using Save As

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

To create a PSR using Save As in Java Client:

1. Open a PSR you want to use as the basis for a new PSR.
2. Choose File> Save As or right-click and select Save As. The Save As dialog appears.
3. Select the required sub-class (NCR or Problem Report) from the Type list.
4. In the PSR Number field, accept the default number, enter a number, or click the Autonumber button to generate a new number.
5. Click OK.
6. Enter values in relevant fields on the Cover Page tab.
7. Click Save to save the changes.

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

To create a PSR using Save As in Web Client:

1. Open a PSR you want to use as the basis for a new PSR.
2. Choose Actions > Save As. The Save As dialog appears.
3. Select the required sub-class (NCR or Problem Report) from the Type list.
4. In the PSR Number field, accept the default number, enter a number, or click Autonumber button to generate a new number.
5. If the original PSR contains Attachments, then a frame displays the following options:
 - Reference existing files - creates a new reference to the existing file folder on the new PSR's Attachments tab.
 - Create new copies of files - creates a new copy of the attachment, and places it in a newly created file folder.
 - Do not include files - creates a new PSR without any attachments
6. Click Save. The new PSR opens displaying the Cover Page in the edit mode.
7. Enter values in relevant fields on the Cover Page tab.
8. Click Save to save the changes.

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

Fields copied from old object	Pre-populated fields
Category, PSR Type, Problem Description, Severity, Product Line(s)	Originator
Page two and Page Three flex fields	Date Originated
Copies all the item information from the Affected Item tab.	Status field is set to Unassigned by default.
Copies all attachments from the Attachments tab	Not applicable
History tab reflects the source and target objects	Not applicable

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

For more information about the behavior of Page Two and Page Three fields in an Agile PLM system, see *Agile PLM Administrator Guide*.

The PSRs you create remain in the system until you delete them. Deleting PSRs does not remove them from the Agile database. To delete PSRs permanently, you must hard-delete them.

For details on deleting PSRs and QCRs, see [Appendix A, "Deleting Agile Objects."](#)

Searching for PSRs or QCRs

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

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

To run a quick search:

1. Select an object and enter a wildcard (*).
2. Click the Execute a Quick Search button. The Search results return a list of objects.
3. Select the Convert to Advanced Search option, if required.

For details, see the chapter 'Searches' in *Getting Started with Agile Product Lifecycle Management*.

Cover Page Tab of a PSR

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

Fields	Completed	Indicates
PSR Number	<p>Usually, automatically, when you create it.</p> <p>If you set 'Autogenerate' to 'Yes' in the Java Client, then the number is generated automatically. If not you must enter the PSR number manually.</p>	<p>The number assigned to the PSR when you create it.</p> <p>For Problem Reports, the number is pre-fixed with PR.</p> <p>For Non-Conformance Reports, it is pre-fixed with NCR.</p>
PSR Type	Automatically, when you create it.	The type (subclass) selected when you create the PSR.
Category	Manually	<p>The list of categories defined by the Agile PLM Administrator. For example:</p> <p>Customer Complaint</p> <p>Audit - External</p> <p>Preventive Action</p>
Description	Usually manually, can contain a default.	Maximum number of bytes is set by the Agile PLM Administrator; up to 4000 bytes, including spaces and carriage returns (which count as two bytes).
Customer	Manually	The list of customers associated with this PSR.
Supplier	Manually	List of suppliers who initiated the incident or are the cause of the incident.
Severity	Manually	List of severities defined by the Agile PLM Administrator.
Disposition	Manually	<p>List of dispositions defined by the Agile PLM Administrator. The Disposition field displays a code that represents the way in which you resolve a PSR.</p> <p>Examples of dispositions are Replace Component and Rework to Spec.</p>
Expected Resolution Date	Manually	Date when you expect to resolve the PSR.
Quality Analyst	<p>May be provided automatically by the workflow; otherwise selected manually from a list. Departments appear first in the list, followed by individual user names.</p>	<p>The default Quality Analyst.</p> <p>If you define the workflow to notify the default Quality Analyst, the department or user in this field receives notifications about the PSR. If this field is blank, then the notifications are sent to every quality analyst on the list.</p> <p>If the workflow is at the Pending status and has a Quality Analyst defined then that user receives notification.</p> <p>If the notification definition in the workflow is blank, then no notifications are sent.</p>

Workflow	If more than one workflow applies to the PSR, the workflow is selected manually; you can change the workflow until the PSR is in the Pending status. You cannot move the PSR to the next status from the Unassigned state without assigning a workflow.	The name of the workflow used to move this PSR through the quality tracking process.
Status	Automatically, when created	The current workflow state of the PSR. If you do not select a workflow, the status remains Unassigned.
Originator	Automatically, when created.	The default creator of the PSR. Also contains a list of other problem report originators.
Date Originated	Usually automatically, when created.	The date you create the PSR.
Date Submitted	Automatically generated based on workflow status.	The date when the PSR moves to the Submitted status in the workflow.
Date Released	Automatically generated based on workflow status.	The date when the PSR moves to the Released status in the workflow.
Final Complete Date	Automatically generated based on workflow status.	The date when the PSR moves to the Complete status in the workflow.
Aggregate PSR Number	Automatically filled in when you add PSRs to the Related PSR tab.	Automatically fills the parent PSR number.
Product Lines	Manually	The product lines this PSR affects.

Updating the Cover Page of a PSR

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

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

1. Open a PSR. The PSR number and the PSR type fields are pre-populated.
2. Select a value from the list in the Category field.
3. Enter text in the Description field.
4. Click the link to search for Customers.
5. A Select Objects dialog appears. Enter * and click the Search button.
6. From the Search results list, select an object and move it to the Selected Objects column using the arrow.
7. Click OK. Alternatively, you can:
 - Click the Saved Searches tab and search in the available folders.
 - Click the shortcuts tab and search in the Recently Visited folder and the Bookmark folder.
 - Click the Advanced Search link.

8. Choose Severity of the PSR from the list.
9. Choose a Disposition from the list.
10. Use the calendar and select an Expected Resolution Date.
11. Click Save to save the changes.

The Cover Page displays modified values.

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

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

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

To search for existing Customers or Suppliers:

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

To create new Customers:

1. Click the Create to add button to create Customers or Suppliers.
2. A Create New dialog appears. In the Type field, select a Customer from the list.
3. In the Number field, enter a number or click Autonumber button.
4. Enter Customer Name.
5. Click Save. The Customer object automatically displays the PSR under the Quality tab.
6. Choose Severity of the PSR from the list.
7. Choose a Disposition from the list.
8. Click the calendar to select a resolution date. You can also use the combination Ctrl + L keys to launch the calendar.
9. Choose a Workflow from the list. Updates of the workflow status are automatic as the PSR moves to the next status.

10. The Originator and Quality Analyst fields are pre-defined.
11. Click the palette and choose one or more Product Lines that this PSR affects.
12. Click Save to save changes.

The Cover Page displays modified values.

Affected Items Tab of a PSR

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

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

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

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

The Affected Items table of an NCR lists and describes the following default fields.

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

Field	Completed	Indicates
Rev Fixed	Automatically. When you fix the problem in the revision. You can also change it manually.	The revision of the Item in which the problem is fixed. You can update this field manually or it is populated automatically when you release the ECO.

Note: The Item Number field indicates the ascending or descending order of the table, depending on the sort order you choose in the Personalize menu.

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

Attributes of the Affected Items Tab of an NCR

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

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

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

Adding Items to the Affected Items Tab of a PSR

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

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

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

To create items:

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

The Item appears on the Affected Items table.

To search for existing items:

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

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

If you click the Add button once without selecting an option from the list, the Type-in Known Numbers dialog appears. To type in known numbers:

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

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

1. Open the PSR and click the Affected Items tab.
2. Click Add in the Affected Items tab.
 - Click the Search to add button to launch the search palette. You can also use the combination keys Ctrl + I to launch the search field.
 - Enter the value or * to search for and click the Execute a Quick Search button.
 - Select an Item from the list that appears. To move it to the Affected Items table, you can either:
 - Copy an Item existing on one PSR and paste it in the Affected Item's table of another PSR.

To search for existing items:

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

3. Select an Item from the list that appears. To move it to the Affected Items table, you can either:
 - Drag and drop it.
 - Double-click the object.
 - Press Enter.

Click the Close button to close the palette.

The Item appears on the Affected Items table.

To create items:

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

The Item appears on the Affected Items table.

To copy and paste objects:

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

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

The Item appears on the Affected Items table.

Removing an Item from the Affected Items Tab

You can also remove Items from the Affected Item table.

To remove an item from the Affected Items tab in Java Client:

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

To remove an item from the Affected Items tab in the Web Client:

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

3. Click Remove.

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

Editing Items on the Affected Items Tab

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

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

1. Open a PSR and click the Affected Items tab.
2. Select the item row you want to edit.
3. Click the Edit Affected Items button. The Edit Affected Items dialog appears.
4. Double-click the cell of the row, to edit the required fields.
5. Modify text or use the lists to select values.
Alternately, double-click the cell, edit the content and press Enter
6. When you finish editing, click OK.

For more details on the fields, see "[Affected Items Tab of a PSR](#)" on page 2-9.

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

Example 2-1 Updating Rev field manually

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

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

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

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

Related PSR Tab

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

For example, if multiple customers reported similar problems, each problem reported creates a Problem Report. The Quality team realizes they are related and hence can be

resolved with a single solution. To resolve the problem, the Quality team creates a single PSR (Parent PSR) and adds (aggregates) the related PSRs to the Parent PSR.

The table below lists and describes the default fields available on the Related PSR tab.

Field	Completes	Indicates
PSR Criteria Met	Automatically, when you meet the PSR Event criteria.	<p>Indicates when the PSR event occurred (that is, the parent PSR has reached the status selected for the PSR event).</p> <p>Once the parent PSR attains the status specified in the PSR Event field, then the related PSR status automatically moves to the status specified in the PSR Result field and completes the criteria specified.</p>
Event	Manually	<p>The status of the parent PSR that triggers an automated workflow event.</p> <p>Select an available status from the list. You can specify the status only when the PSR has a workflow assigned. When this event occurs, it means that the PSR has reached the specified status.</p> <p>The default value of the PSR Event is set to the Closed status. If you have Quality Analyst privileges, you can set the default value to another status in Java Client.</p> <p>You can specify the PSR Event status only when both objects (parent and child) are assigned a workflow on the Cover Page tab.</p>
Result	Manually	<p>The status to which the related PSRs are promoted when the event status is reached. Select an available status from the list. You can specify the status only when the PSR has a workflow assigned.</p> <p>When the parent PSR reaches the status in the PSR Event field, then the status of the related PSR is automatically moved to the specified result status in this field.</p> <p>The default value of the PSR Result is set to the Closed status. If you have Quality Analyst privileges, you can set the default value to another status in Java Client.</p> <p>You can specify the PSR Result status only when both objects (parent and child) are assigned a workflow on the Cover Page tab.</p>
PSR Type	Automatically	The type of the PSR
PSR Number	Manually; when you enter the PSR number	The related PSR number.
PSR Category	Automatically	The quality incident category of the related PSR.
PSR Customer	Automatically	The customers associated with the related PSR.
PSR Supplier	Automatically	The suppliers associated with the related PSR.
PSR Severity	Automatically	The severity of the related PSR. The Agile PLM administrator defines the severities.
PSR Disposition	Automatically	The way the PSR was resolved.

PSR Expected Resolution Date	Automatically	The date you expect the resolution for the related PSR.
PSR Quality Analyst	Automatically	The quality analyst assigned to the related PSR. If you define the workflow to notify the default quality analyst, the department user in this field receives notifications about the PSR
PSR Workflow	Automatically	The name of the workflow used to move this PSR through the quality tracking process.
PSR Status	Automatically	The workflow status of the related PSR. If you do not select a workflow, this field is Unassigned.
PSR Originator	Automatically, when created	The default creator of the PSR.
PSR Date Originated	Usually automatically, when created	The date when you create the related PSR.
PSR Date Submitted	Usually automatically, when created	The date when you submit the related PSR.
PSR Date Released	Usually automatically, when created	The date when you release the related PSR.
PSR Final Complete Date	Usually automatically, when created	The date when you complete the related PSR
Aggregate PSR Number	Automatically filled in when PSRs are added to the Related PSR tab.	Field filled in automatically with the parent PSR number.

Note: The Event field indicates the ascending or descending order of the table, depending on the sort order you choose in the Personalize menu.

Adding Related PSRs to the Parent PSR

Ensure you have sufficient privileges to add related PSRs.

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

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

To create objects:

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

The object appears in the Related PSRs table.

To search for one or more existing objects:

1. In the Add Related Objects dialog box, select a search method.

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

The object appears in the Related PSRs table.

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

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

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

To search for existing objects:

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

The object appears on the Related PSR table.

To create new objects:

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

The object appears on the Related PSR table.

Editing Items on the Related PSRs Tab

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

To edit related PSRs in Java Client:

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

To edit related PSRs in Web Client:

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

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

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

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

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

Removing Related PSRs

Ensure you have the necessary privileges to remove Related PSRs.

To remove related PSRs in Java Client:

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

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

To remove related PSRs in Web Client:

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

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

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

Relationships Tab

The Relationships tab enables you to create relationships between the current 2 or a QCR and other routable and lifecycle objects. The relationship is visible on Relationships tab of both the objects. You can specify a rule between the objects, which is optional.

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

Relationships - Table

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

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

In the Relationship with a Rule column:

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

No - Indicates that it does not support the functionality.

In the Event/Result column:

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

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

Agile Base Class	Agile Classes	Event/Result	Relationship with a Rule	Reference-Relationship with no rule	Lifecycle under Change Control
Changes	Change Orders	Workflow	Exists	Exists	N/A
Change Requests	Workflow	Exists	Exists	N/A	N/A
Deviations	Workflow	Exists	Exists	N/A	N/A
Manufacturers Orders	Workflow	Exists	Exists	N/A	N/A
Price Change Orders	Workflow	Exists	Exists	N/A	N/A
Site Change Orders	Workflow	Exists	Exists	N/A	N/A
Stop Ship	Workflow	Exists	Exists	N/A	N/A
Customers	Customers	Life cycle	Yes	Exists	No
Declarations	Homogeneous Material Declaration	Workflow	Exists	Exists	N/A
IPC 1752-1 Declarations	Workflow	Exists	Exists	NA	N/A
IPC 1752-2 Declarations	Workflow	Exists	Exists	NA	N/A
JGP SSI Declarations	Workflow	Exists	Exists	NA	N/A

Part Declarations	Workflow	Exists	Exists	NA	N/A
Substance Declarations	Workflow	Exists	Exists	N/A	N/A
Supplier Declaration of Conformance	Workflow	Exists	Exists	N/A	N/A
FileFolders	File Folder	Lifecycle	Yes	Exists	No
Items	Documents	Lifecycle	Yes	Yes	N/A
Parts	Lifecycle	Yes	Yes	N/A	N/A
Manufacturer Parts	Manufacturer Parts	Lifecycle	Yes	Yes	N/A
Manufacturer	Manufacturer	Lifecycle	Yes	Yes	No
Packages	Packages	Workflow	Yes	Yes	N/A
Part Groups	Part Groups	Lifecycle	Yes	Yes	No
Prices	Published Process	Lifecycle	Yes	Yes	Yes
Quote Histories	Lifecycle	Yes	Exists	Yes	N/A
PSRs	Non Conformance Reports	Workflow	Exists	Exists	N/A
Problem Reports	Workflow	Exists	Exists	N/A	N/A
Programs	Activities	Workflow	Exists	Exists	NA
Gate	Workflow	Exists	Exists	N/A	N/A
QCRs	Audit	Workflow	Exists	Exists	N/A
CAPA	Workflow	Exists	Exists	N/A	N/A
Requests for Quotes	Requests for Quotes	Lifecycle	Yes	Yes	No
RFQ Response	RFQ Response	Lifecycle	Yes	Yes	No
Sites	Sites	Lifecycle	Yes	Yes	No
Sourcing Projects	Sourcing Projects	Lifecycle	Yes	Yes	No
Specifications	Specifications	Lifecycle	Yes	Yes	No
Substances	Materials	Lifecycle	Yes	Yes	No
Sub Parts	Lifecycle	Yes	Yes	No	N/A
Substances	Lifecycle	Yes	Yes	No	N/A
Suppliers	Suppliers	Lifecycle	Yes	Yes	No
Transfer Orders	Automated Transfer Orders	Workflow	Yes	Yes	N/A
Content Transfer Orders	Workflow	Yes	Yes	N/A	N/A
User Groups	User Groups	None	No	Yes	N/A
Users	Users	Status Attribute	No	Yes	N/A
Action Items	Action Items	Status Attribute	No	No	N/A

Discussions	Discussions	None	No	Yes	N/A
Reports	Custom Reports	None	No	No	NA
External Reports	None	No	No	N/A	N/A
Standard Reports	None	No	No	N/A	N/A

Relationships in PQM

This topic contains additional information about relationships as they are used in the PQM solution:

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

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

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

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

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

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

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

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

What are Reference Objects?

In Agile PLM, the table on the Relationships tab enables users to add references to other objects in Agile PLM. The Reference Objects feature enables you to search for objects in external applications and add them as references on the Relationships tab.

From the Relationships tab, an end user can:

- Search for an object in an external application and add a reference to that object in Agile PLM Relationships table.
- Create a new object in an external application, and add a reference to that object in the Agile PLM Relationships table.
- Search, add, and remove Reference Objects from the Agile PLM Relationships table.

Attributes of a Relationship

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

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

For details, see the chapter 'Relationships' in *Getting Started with Agile Product Lifecycle Management*.

Revision Specific Relationships

The Relationship tab of revision controlled objects display Impacted, Revision, Track Impact, and Change columns. These are visible for a class or sub class when you configure revision attributes in the Java Client Administrator. By default it is configured to 'No'. You must also enable the Read and Modify privileges. This function is supported only in Web Client.

For details on how to enable or disable attributes in Java Client, see the *Agile PLM Administrator Guide*.

Revision column: The Relationship table displays Revision column if the 'Visible' attribute is set to 'Yes' in Admin. Revisions are tracked only for Items and Prices. Multiple revisions are allowed for Items on the relationship table. The Rev number column drop down menu enables you to select the revision for the relationship while in the edit mode. The default value is 'Latest' for both the source and target relationship rows.

If the Java Client setting, 'Display Change on Relationship Tab Revision drop-down' is set to 'Yes', the revision column displays the value selected along with the revision.

For example: LATEST - A. The Revision drop down on the Relationship Table displays the Change ID next to the Revision.

Change column: The Relationship table displays Change column if the Change is set to 'Yes'. You can click the link in the Change column to take you to the selected revision of the Change. The Change column is derived from the Revision number and can contain an ECO or MCO. If you hide the Change column, only Revision numbers are visible. Multiple versions display duplicate Revision numbers. You cannot add any values into the items relationship when items have a Pending ECO or MCO. It will pop up error information like 'Relationships added from a Pending Revision is not allowed. Please go to Part P00101 (target objects) to add a relationship to Part P00120'.

You cannot add relationships on a Site Change Order. A message, "Revision Specific Relationships cannot be added to Site Change Order revisions. Select a different revision" appears.

Impacted: The Impacted flag indicates that revision controlled objects are impacted by the Change (Items or Prices) and that the Relationship Target has changed. The Impacted icon does not appear on the relationship table by default. The flag appears on releasing a revision of the object and if the Track Impact flag is set to 'Yes'. If the 'Impacted' column of a relationship row (Items and Prices) displays 'Yes', the dot in the relationship tab changes to a red square. When all the Relationship rows display 'No' in the 'Impacted' column, the red square on the relationship tab (of Items and Prices) changes to a black dot.

Track impact: Track Impact tracks the impact of a change on rev controlled objects. (You are tracking the effects caused by a change). The target object must be revision controlled object to edit the Track Impact flag. If not, a message "This attribute can only be edited for Revision Controlled Relationships" appears.

For revision controlled objects, the track impact is 'Yes' by default. If Track Impact is 'Yes':

- When the revision controlled target is released, the 'Impacted' flag for the target appears.
- If the target is revision controlled & track impact is set to "Yes", the 'Impacted' flag appears always.

When you enable Revision in Java Client, the Accept New Version and Reject New version actions are enabled in the More menu in Web Client.

You require the Read and Modify privileges to accept or reject a revision.

Accept New Version: The Accept New Versions menu item appears in the More menu if you select row /rows which have both the Track Impact and Impacted flags set to 'Yes'. A warning message appears to ensure you have set them to 'Yes'. Once you select the Accept New Versions, the revision of the selected row is updated with the latest revision of the impacted object. You can choose to reject single or multiple rows at a time. The object auto promotes to the latest revision when the related item is released.

Reject New Version: The Reject New Versions menu item appears in the More menu if you select row /rows which have both the Track Impact and Impacted flags set to 'Yes'. A warning message appears to ensure you have set them to 'Yes'. Once you select the Reject New Version, the Impacted flag in the rows you have selected changes to No and the icon in the Track Impact column disappears. You can choose to reject single or multiple rows at a time.

Relationships Tab Tools

The Relationships tab has the following buttons:

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

The Relationships tab page includes the Views and Personalize buttons. The Personalize menu enables you to create and customize Views.

For details on Views, see chapter 'Navigating in Agile Web Client' in *Getting Started with Agile Product Lifecycle Management*. See also: "[Attachments Tab of a PSR](#)" on page 2-30.

Relationships Tab Table

The Relationships table lists the following default fields.

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

Note: The Name field indicates the ascending or descending order of the table, depending on the sort order you choose in the Personalize menu.

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

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

To add objects to the relationships table in Java Client:

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

To create objects:

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

The object appears on the Relationships tab.

To search for existing objects:

1. In the Add Relationship dialog box, select a search method.

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

The selected object appears on the Relationships table.

To add objects to the relationships table in Web Client:

1. Navigate to the Relationships tab of an object.
2. Click the Add menu button and choose one of the following options:
 - Choose By Search to search for an object. Open the search palette. Execute a quick search to find the objects you want. Double-click to add an object. Press Escape to close the palette
 - Choose By Create to create a new object. Select an object type, fill in any required fields, and then click Add. The newly created object is added to the table.
 - Choose Reference Objects to search for an object in an external application and add it as a reference in the relationships table.

In the Search palette that opens, search for the object and click the name of the object to view it in the corresponding application.

Click OK to add the reference object.

For details about configuring reference objects, see *Agile PLM Administrator Guide*.

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

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

Editing the Relationships Table

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

To edit the relationships table in Java Client:

1. Open a PSR and click the Relationships tab.
2. Select the row you want to edit.
3. Click the Edit Relationship button.

4. Modify required fields.
5. Click OK.

The modified values appear on the table.

To edit the relationships table in Web Client:

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

The modified values appear on the table.

Removing Relationships

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

To remove relationship in Java Client:

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

The object does not appear on the Relationships table.

To remove relationship in Web Client:

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

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

Relationships Rules

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

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

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

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

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

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

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

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

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

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

Adding Relationship Rules

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

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

To access more information about this object, click the Quick View info link. This appears when you position the cursor on the corresponding object and enables you to view details of the object and perform some actions without navigating to the actual object.

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

To add a relationship rule in Java Client:

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

For example: When PR0002 is Review, Set PR123304 to Submitted.

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

To add a relationship rule in Web Client:

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

For example: When Problem Report PR000142 is Review, Set Problem Report PR00144 to Submitted.

The rule appears on the message bar.

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

Alternately, you can use the Edit Rule button to add a rule. The rule appears in the Relationships table of the corresponding object.

Editing Relationships Rules

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

To edit the relationship rule in the Java Client:

1. Open a PSR and click the Relationships tab.
2. Select a row on the Relationships table you want to edit.
3. Click the Edit Rule button.
4. In the Relationships Rule dialog, modify the rule.
5. Click OK.

The modified rule displays on the Relationships table.

To edit the relationship rule in the Web Client:

1. Open a PSR and click the Relationships tab.
2. You can either:
 - Click the Edit Rule button.
 - Click the Edit Rule button.
 - In the Relationships Rule dialog, modify the rule.
 - Click Save to save the changes.
 - Click the Quick View info link that appears when you position the cursor on the PSR.
 - Click the Edit Rule link.
 - In the Relationships Rule dialog, modify the rule.
 - Click Save to save the changes.

3. Click the Close button to close the palette.

The modified rule displays on the Relationships table.

Removing Relationship Rules

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

To remove the relationship rule in Java Client:

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

The rule does not appear in the Rule column.

To remove the relationship rule in Web Client:

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

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

The rule does not appear in the Rule column.

Filter

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

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

- All Relationships - Enables you to filter all the relationship objects in the table.
- Complete - Enables you to filter all the objects for which the criteria are met.
- Pending - Enables you to filter objects for which the rule criteria are not met.
- Rule not specified - Enables you to filter objects which have no rules specified.

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

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

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

Additional attributes listed below help filter relationships further.

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

For details on Views and Personalize menus, see *Getting Started with Agile Product Lifecycle Management*.

Workflow Tab of a PSR

An Agile PLM workflow is a sequence of statuses that a routable object goes through in the quality control process. The Workflow tab displays the statuses the PSR is

routed through during its lifecycle. It starts with the Pending status and finishes with the Closed status. The PSR can be canceled or put on hold during any phase. Users with the appropriate privilege and role submits the PSR and routes it for review. Notified reviewers review the PSR, make required changes and routes it for approval. Reviewers include Approvers who approve or reject the PSR, Acknowledgers who acknowledge the change and Observers who give their comments.

Functional Teams consist of the Approvers, Acknowledgers and Observers you choose to notify the change. The Add Reviewers / Remove Reviewers buttons allow you to add/remove Approvers, Acknowledgers and Observers.

The Workflow tab page displays two sections:

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

Colors represent the status of the workflows:

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

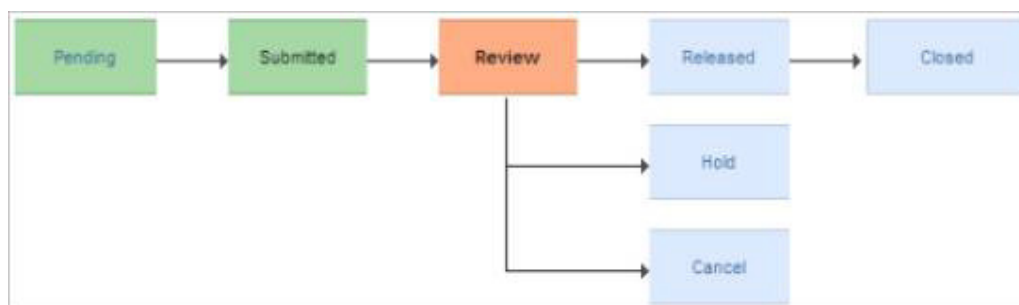
The Sign-Off History table displays past workflow and sign-off information for the PSR. For example, you can route a PSR:

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

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

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

Figure 2-1 Workflow of a PSR



For details, see the chapter 'Routing Objects with Workflows' in *Getting Started with Agile Product Lifecycle Management*.

Submitting and Routing PSRs

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

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

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

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

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

Hold and Cancel statuses are indicated on the Workflow chart or on the Next Status drop down menu only after the PSR reaches the Submitted status.

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

Approval Matrix

The Approval Matrix feature enables you to automatically assign Approvers, Observers, and Acknowledgers to routable object workflow actions according to the job functions they perform at work.

For more details on how to set-up and enable the feature, see the chapter 'Approval Matrix' in the *Agile PLM Administrator Guide*.

Functional Team: Group of Users and/or User Groups who work as a team while performing specific job functions.

The Functional Team attribute appears on the cover page of routable objects (PSRs and QCRs). When these objects are routed on workflows, the functional team on the object helps determine the Approvers, Acknowledgers, Observers and Users to be notified.

Job Function: A job role that a user performs at work. Examples: Product Manager, Product Marketing Manager, Development Lead, Development Manager and so on.

Attachments Tab of a PSR

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

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

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

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

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

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

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

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

Working with Quality Change Requests

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

Creating QCRs

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

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

To create a QCR in Java Client:

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

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

To create a QCR in Web Client:

1. Launch Agile Web Client.
2. From the main toolbar, click the Create New drop-down button. Select Quality Change Request > Audit or Corrective and Preventive Actions. The Create New dialog appears.
3. In the Type field, select a value from the list.
4. In the QCR Number field, accept the default number, enter a number, or click Autonumber button to generate a number.
5. Click Save.

Agile Web Client creates the QCR and displays it with the Cover Page tab in the edit mode. If you do not assign a workflow to the QCR, the QCR displays the Unassigned status.

To assign a workflow to the QCR:

1. Open a QCR and click the Edit button.
2. Select a workflow from the Workflow list. For details, see "[Workflow Tab of a QCR](#)" on page 3-8.
3. Click Save.

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

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

Creating a QCR using Save As

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

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

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

To create a QCR using save as in Java Client:

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

To create a QCR using save as in Web Client:

1. Open the QCR you want to use as the basis for the new QCR.
2. Click the Actions drop-down menu.
3. Select Save As.
4. In the Save As dialog that appears, select Audit or CAPA from the Type list.
5. In the QCR Number field, accept the default number, enter a number, or click Autonumber button to generate a number.
6. Click Save.

7. The QCR opens displaying the Cover Page in edit mode. Modify required fields.
8. Click Save to save the changes.
9. The QCR appears displaying the Cover Page.

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

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

Creating a QCR from an Item

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

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

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

To create a QCR from an item in Java Client:

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

Agile Java Client creates the QCR and displays it with the Cover Page in the edit mode.

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

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

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

The QCRs you create remain in the system until you delete them. Deleting QCRs does not remove them from Agile database. To delete a QCR permanently from the system you must hard-delete them.

For details on deleting QCRs, see ["Deleting Agile Objects"](#) on page A-1.

Creating a QCR from a PSR

Creating QCRs from PSRs enables you to tag corrective actions on to a Product Service Request. You can create a QCR directly from a PSR or an individual item. You can create a QCR using the Actions Menu in Web Client and the More button in Java Client. The QCR enables you to aggregate incoming problems into a routable quality record, perform root-cause failure analysis, and drive the problems to closure using standard CAPA (corrective and preventive actions) procedures.

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

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

The QCR opens in the edit mode.

To create a QCR from a PSR in Web Client:

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

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

Cover Page Tab of a QCR

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

Field	Completed	Indicates
QCR Number	Automatically, when created	The number you assign to a QCR, when you create it.
QCR Type	Automatically, when created	The type of subclass you select when you create the QCR.
Category	Manually	List of categories defined by the Agile PLM Administrator.
Description	Usually manually, can contain a default.	Describes the QCR. Maximum number of bytes is set by the Administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).

Field	Completed	Indicates
Reason	Usually manually; can contain a default	Reason for creating the QCR. Maximum number of bytes is set by the Administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).
Customer	Manually.	The Customer associated with the QCR.
Supplier	Manually	List of Suppliers associated with the QCR. For example, Suppliers can initiate a SCAR if they must resolve issues in the process, products or other areas.
Workflow	Usually selected manually. If you do not assign a Workflow to a QCR it remains in the Unassigned state. You are prompted to select a Workflow, when you move the QCR to the next status without assigning a Workflow. You can change the workflow selection until the QCR is in the Pending status type.	The name of the workflow used to move this QCR through the quality control process.
Quality Administrator	Select from a list. In the list, Departments appear first, followed by individual user names.	The default Quality Administrator. If you prefer another QA over default QA, the system displays a message "Quality Administrator" selected is not one of the defaults. The default Quality Administrator list includes: Default QA UserName (Userid), " If you define the workflow to notify the default quality administrator, the user groups or user in this field receives notifications about the QCR. If this field is blank, the system notifies to all the quality administrators on the list. If the notification definition in the workflow is blank, no notifications are sent.
Status	Automatically, when created. Updates as the QCR moves through the assigned workflows.	Workflow status. If you do not select a workflow this field displays the Unassigned status.
Originator	Usually automatically, when created (with the default set by the Agile PLM Administrator).	The originator or creator of the QCR.
Date Originated	Usually automatically, when created.	The date you create the QCR
Date Submitted	Automatically generated based on workflow status.	The date when the QCR moves to the Submitted status in the workflow.
Date Released	Automatically generated based on workflow status.	The date when the QCR moves to the first released status in the workflow
Final Complete Date	Automatically when the QCR enters the Complete type status.	The date the QCR moves to the Complete status type.

Field	Completed	Indicates
Preventive Action	Usually manually; can contain a default. Maximum number of bytes is set by the Agile PLM administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).	A pro-active action taken to prevent the problem from happening again. Applies only to CAPAs.
Root Cause Analysis	Manually. Maximum number of bytes is set by the Agile PLM administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).	The root cause of the problem. Applies only to CAPAs.
Planned Audit Date	Manually	Date planned to audit the problem.
Audit Result	Usually manually, can contain a default. For example, when you implement a CAPA, the Quality Analyst performs an Audit to ensure the CAPA actually solves the problem. If the fix for the problem is validated, then the result is pass. Otherwise it fails, and the Quality Analyst updates the Audit Result field.	Audit process result. The default setting for the audit result is Pass/Fail. For more details, on other settings contact the Agile Administrator.
Product Lines	Usually manually; can contain a default.	List of product lines defined by the Agile Administrator.

Updating the Cover Page of a QCR

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

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

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

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

The Cover Page displays updates of the QCR.

Affected Items Tab of a QCR

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

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

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

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

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

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

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

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

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

Note: The Item Number field indicates the ascending or descending order of the table, depending on the sort order you choose in the Personalize menu.

Relationships Tab of a QCR

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

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

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

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

The Relationships tab of a QCR is similar to that of a PSR. See also: "[Relationships Tab](#)" on page 18.

Workflow Tab of a QCR

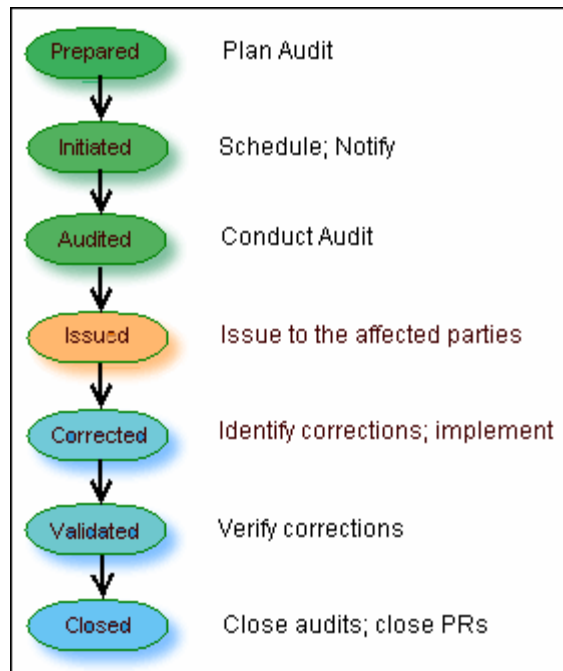
The Workflow tab displays a flowchart of the workflow you selected on the Cover Page. An Agile PLM workflow is a sequence of statuses that a routable object follows as it goes through the different statuses in the quality control process. The status with the orange background (Web Client) or the yellow background (Java Client) is the current status. The Sign off History table displays past workflow and sign off information for the QCR.

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

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

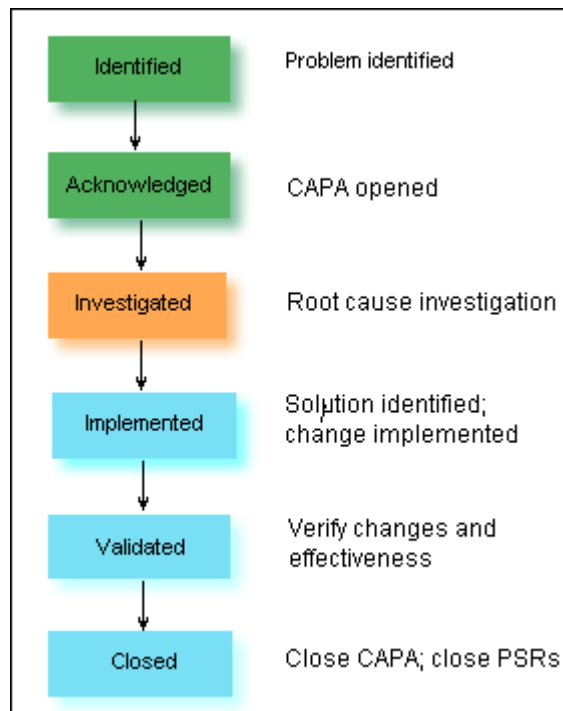
The status of the audit workflow begins with Prepared state and that of the CAPA with the Identified state.

Figure 3-1 Default Audit



The table below represents the status of a default CAPA.

Figure 3-2 Default CAPA



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

The general route for an Audit is as follows:

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

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

The general route for an CAPA is as follows:

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

For a CAPA, the Hold and Cancel statuses are indicated on the Workflow chart or on the Next Status drop-down menu, after it reaches the Acknowledged status.

Submitting and Routing a QCR

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

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

Attachments Tab of a QCR

You can reference files and attachments from the Attachments tab of a QCR. The Attachments tab of a QCR is similar to that of the PSR.

For details, see "[Attachments Tab of a PSR](#)" on page 2-30.

Managing Product Service Requests

This chapter describes how you can approve, acknowledge and reject a PSR. Ensure you hold the necessary privilege to approve and reject a PSR.

Approving a PSR

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

To approve a PSR:

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

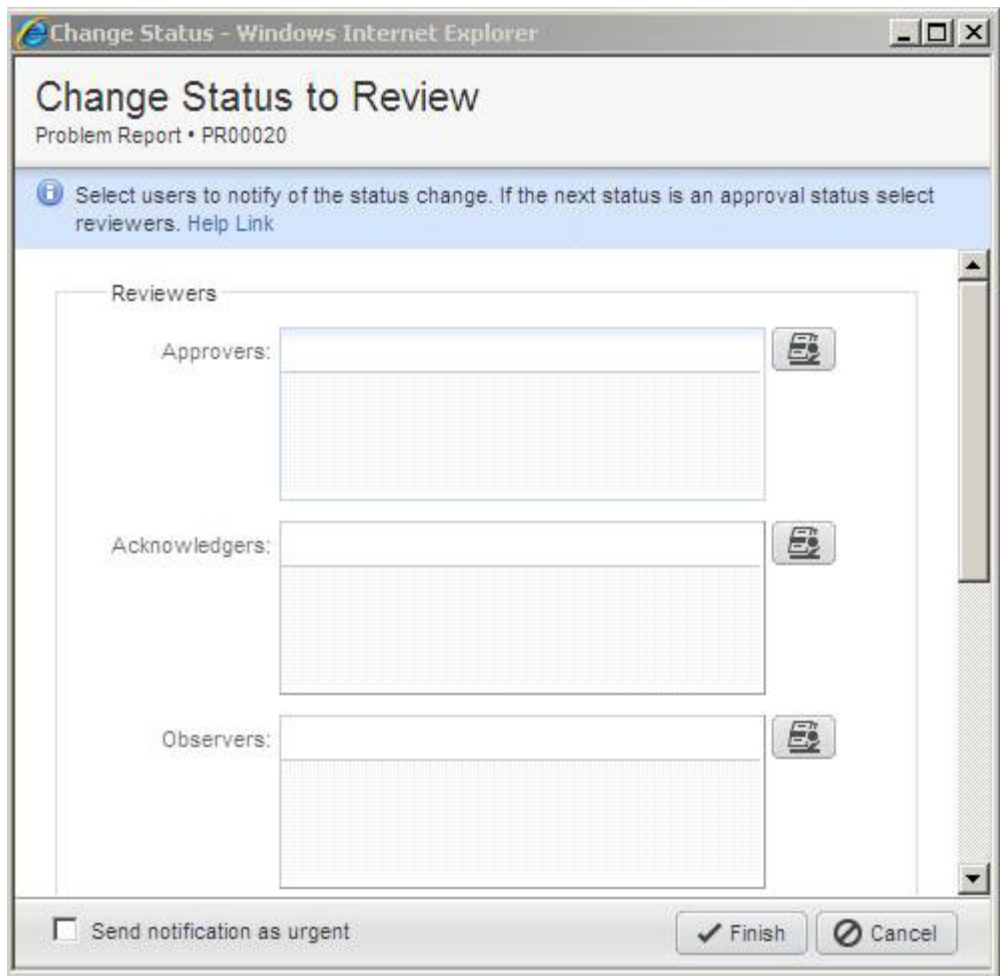
The Password field appears in the Approve/Reject window depending on the Password Required property setting for the current workflow status. For more information about workflow properties, see the *Agile PLM Administrator Guide*.
4. Select the Quality Analyst and Originator you want to notify.
5. Use the palette to add Approvers.

A user cannot be an Acknowledger, Observer and Approver at the same time. An error message displays the name of the user who has multiple workflow roles.
6. Add Comments, if any.
7. Select the Send notification as urgent check box to mark the notification sent out because of this action as "Urgent".
8. Click Approve.
9. Click Finish.

Acknowledging a PSR

The Acknowledge workflow action requires the user to sign off that they reviewed a change. Acknowledgers can be Users, User Groups or Job Functions with Users, or Job Functions with User Groups. You cannot auto promote a workflow if all the acknowledgers have not signed off.

Figure 4–1 Change Status to Review



Rejecting a PSR

When you reject a PSR it appears in the workflow tab of and users associated with it are notified.

To reject a PSR:

1. Open a PSR. (Ensure that it is in the Review or Released status).
2. Click the Reject button located above the tabs. The Reject for Review dialog appears.
3. Enter Password if applicable.
 The Password field appears in the Approve/Reject window depending on the Password Required property setting for the current workflow status. For more information about workflow properties, see the *Agile PLM Administrator Guide*.
4. Select the Quality Analyst and the Originator you want to notify.
5. Use the palette to add Approvers.
6. Add Comments, if any.
7. Select the Send notification as urgent check box to mark the notification sent out as “Urgent”.

8. Click the Reject button.
9. Click Finish.

Closing a PSR

To close or promote a PSR to the complete status:

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

Actions Menu in PSR

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

Actions	Implications
Bookmark	Saves PSR as a Bookmark for future retrieval.
Subscribe	Subscriptions notify you of changes on tables or of attributes on the objects
Save As	Creates and saves a copy of the current PSR in the same or a different subclass.
Delete	Deletes PSR.
Send	Sends PSR to Users who have the necessary Roles and Privileges. Option to send the notification as urgent is also available.
Sharing	Enables Users to grant other users privilege access equivalent to his.
Copy URL to Clipboard	Enables you to copy and paste a link you are viewing in an email or document.
Audit Status	Audits the status of an object to check if the workflow can progress further.
Audit Release	Audits if you can release the object with the existing workflow status.
View Workflows	Enables you to view the workflow states of the PSR.
Print	Prints PSR.
Export	Exports PSR to a delimited text file (CSV), a Microsoft Excel Notebook, or an XML file.
Create Quality Change Requests	Enables you to create Quality Change Requests on the PSR.

Audit Status of a PSR

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

To audit the status of a PSR in Java Client:

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

To audit the status of a PSR in Web Client:

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

Audit Release of a PSR

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

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

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

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

- For the Pending, Review, Released, and Complete status: Required fields for the current status level. (Your Agile Administrator determines the required fields in the workflow property settings.)
- For the Review status: Checks approval of all Approvers.
- For the Released status: Checks all the current release audit rules.

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

To audit the PSR for release in Java Client:

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

To audit the PSR for release in Web Client:

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

Audit Window

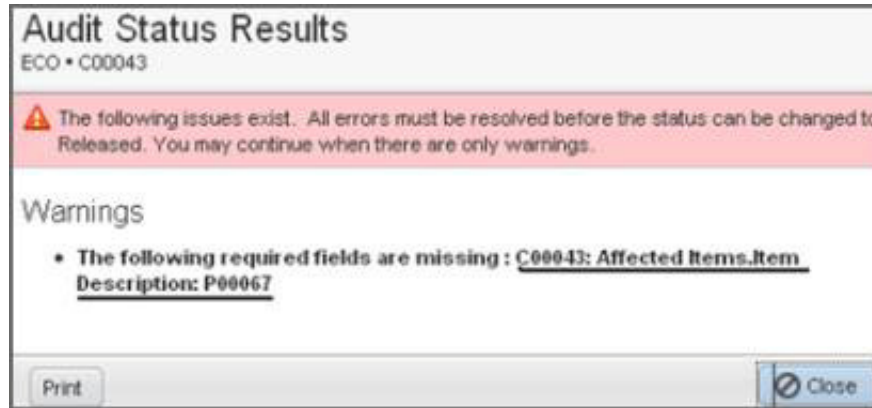
Error/Warning messages on the Audit window have underlined hyperlinks which, on clicking, take you directly to the issue. The Audit window remains open while you resolve the issues. On resolving issues, you run the re-Audit button. Hyperlinks in the messages change color once you have clicked them.

Below are a few examples:

- **Status Audit Errors:** Auditing the current status for the object to move to the next status without hindrance. The status audit is performed automatically when you use the Change Status function or the workflow attempts to auto-promote a PSR to the next status.

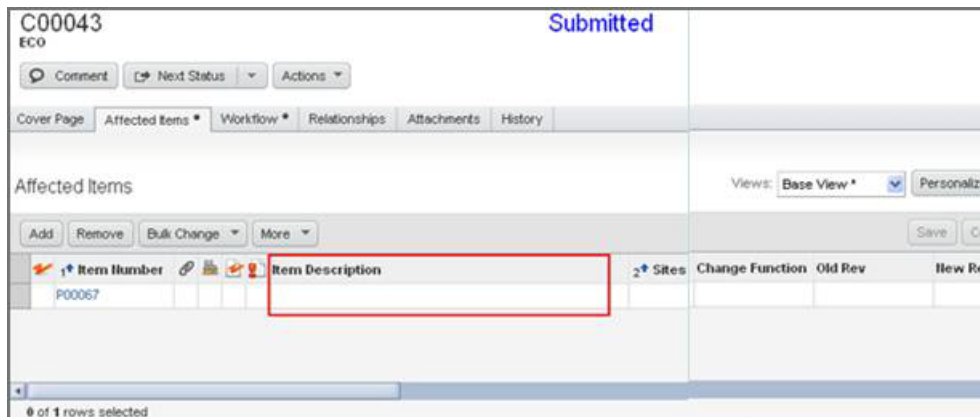
For Missing Exit Required Fields: The workflow definition can have criteria that certain fields are required before leaving the workflow status. For example, you could specify that the Affected Item should have a description before being submitted.

Figure 4–2 Audit Status Results



Clicking on the hyperlink takes you directly to the Affected Items table which you must update.

Figure 4–3 Affected Item Table



For Missing Approvals: If reviewers have not approved. For example: If the status is Review or Release type and approvers have not approved, then clicking on the hyperlink takes you directly to the workflow page and sends a reminder to the missing approvers.

- Release Audit Errors: Auditing the current status to release the routable object. Agile PLM performs a release audit automatically when the routable object is promoted to the first Released type status in the workflow.

Existence of a proposed New Rev Number: If the new rev number is the same as the old number, a Rev conflict an error message appears.

Managing Quality Change Requests

This topic contains details on how to approve, acknowledge and reject a QCR. You must hold necessary privileges and meet the following conditions to approve or reject a QCR.

- The QCR needs to be in review or released type status
- You must be on the QCRs list as an approver or observer.

Approving a QCR

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

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

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

To approve a QCR in the Web Client:

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

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

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

Acknowledging a QCR

The Acknowledge workflow action of a QCR requires the user to sign off, that they reviewed a change. Acknowledgers can be Users, User Groups or Job Functions with Users, or Job Functions with User Groups.

As you change the status of the QCR, it needs to be reviewed by Approvers, Acknowledgers and Observers. Approvers approve the change, acknowledgers acknowledge the change and Observers are informed of the change.

To acknowledge a QCR:

1. Create a QCR and change its status to CCB.
 - Ensure to add an user with sufficient privileges as the Acknowledger for CCB status. For example: Admin.
2. Login as Admin and navigate to the QCR.
3. Click the Acknowledge button. In the window that appears, fill in the required details.
4. Click the Acknowledge button.
5. The Action in the Workflow tab displays Acknowledged to indicate that the change is acknowledged.

Figure 5–1 Add Reviewers

Status	Workflow Stat	Reviewer	Action	Workflow	Req'd	Signoff User
<input type="checkbox"/>	Issued			Default Audits		
<input type="checkbox"/>	Corrected			Default Audits		
<input type="checkbox"/>	Closed			Default Audits		
<input type="checkbox"/>	Validated			Default Audits		
		Admin, Admin08	Acknowledged	Default Audits	Yes	Admin, Admin08

A user cannot be an Acknowledger, Observer and/or Approver. An error message displays the name of the user who has multiple workflow roles.

Rejecting a QCR

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

To reject a QCR in the Web Client:

1. Open the QCR you want to reject.
2. Click the Reject button. The Reject wizard appears.
3. In the Password field, enter your password, if applicable.
 - The Password field appears in the Approve/Reject window depending on the Password Required property setting for the current workflow status.
4. Select the check boxes to notify the Originator, Quality Analyst, and Reviewers.
5. Click the Search palette to select users you want to notify.

6. In the Comments field, enter Approver comments. Comments are not mandatory. You must set Comments for Rejection to Allowed in the Java Client.
For details, see chapter 'Workflows' in the *Agile PLM Administrator Guide*.
7. Click the Reject button.

Closing a QCR

To close or promote a QCR to the complete status:

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

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

Actions Menu in a QCR

The Actions menu lists actions you can perform on the QCR.

Actions	Implications
Bookmark	Saves the QCR as a Bookmark for future retrieval.
Subscribe	Subscriptions notify you of changes on tables or of attributes on the objects
Save As	Creates and saves a copy of the current object in the same or a different subclass.
Delete	Deletes the QCR.
Copy URL to Clipboard	Enables you to copy and paste a link you are viewing in an email or document
Send	Sends QCR to Users who have necessary Roles and Privileges. Option to send notification as urgent is also available.
Sharing	Enables Users to grant other users privilege access equivalent to his.
Audit Status	Audits the status of an object to check if the workflow can progress further.
Audit Release	Audits the object to detect any errors that may prevent switching to another status
View Workflows	Enables you to view the workflow status of the PSR.
Print	Prints the QCR.
Export	Exports the QCR to a delimited text file (CSV), a Microsoft Excel Notebook, or an XML file.
Create Change	Enables you to create a Change directly from the QCR.
View Workflows	Enables you to view the workflow status of a QCR

Change Order in a QCR

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

To create a change from a QCR in Java Client:

1. In the Cover Page of a QCR, right-click and select Create Change.
2. Select a Change object type from the Type list - MCO, ECO, ECR, Deviation, or Stop Ship.
3. In the Number field, type a number or click the AutoNumber button to generate a number.
4. The Add Affected Items to Change table lists all Affected Items of QCR and PSR. Select items from the list of Affected Items and PSR Items. If an Item is already associated with a Change, it still appears in this list so that you can initiate multiple changes related to one Item. The list shows unique items (if the item appears in the Affected Items and PSR Items, then it displays the item only once).
5. Click OK.

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

To create a change from a QCR in Web Client:

1. Open the QCR and select Actions | Create Change menu option.
2. In the Create New dialog, select a Change object type from the sub-class list - MCO, ECO, ECR, Deviation, or Stop Ship.
3. In the Number field, type a number or click the Autonumber button to generate a number.
4. The Date Originated field is pre-populated.
5. Click the Search palette to add Versions.
6. Use the Search palette to add Affected Items. Select and double-click an object to move it to the Affected Items field.
7. Click Close.
8. Click Save.

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

Deleting Agile Objects

This appendix describes how you can delete Agile objects.

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

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

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

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

You cannot undelete a hard-deleted object.

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

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

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

Notes about Deleting PSR or QCR Objects

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

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

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

You cannot delete a PSR if:

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

You cannot delete a QCR if:

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

Soft-Deleting an Object

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

To soft-delete an object in Java Client:

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

The object is soft-deleted.

To soft-delete an object in Web Client:

1. Select and open the object you want to delete.
2. Choose Actions > Delete, and respond OK to the confirmation prompt.

The object is soft-deleted.

Undeleting an Object

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

To undelete an object in Java Client:

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

To undelete an object in Web Client:

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

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

Hard-Deleting an Object

Soft-deleted objects still exist in the database. To remove an object permanently, you must hard-delete it. While an object is still only soft-deleted, you can undelete it.

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

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

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

1. Run the appropriate Deleted objects search from the Recycle Bin Searches folder.
2. Select the one or more object rows in the search results table.
3. Click the Delete button.
4. In response to the warning prompt, choose Continue and then click Finish.
5. Or, you can hard-delete one object at a time:
 - Open the object.
 - Choose Actions > Delete, and respond OK to the confirmation prompt.

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

Glossary

Activity

A project activity in Agile Product Portfolio Management, such as a program, task, or phase.

Affected Files

Similar to Affected Items, these objects are EC files that are Design Release Candidates.

Agile Configuration Propagation (ACP)

Propagating existing configuration of PLM to the newly installed version of PLM.

Agile Content Service (ACS)

ACS is an event-driven XML-based publishing service that makes the product record available to a wide variety of business applications and users, internally and across the global manufacturing network

Agile Destination

A package created by an Agile PLM system in the target PLM using Web Services to import from the Attachments tab of the package in the target system.

Agile Integration Services (AIS)

A collection of predefined Web Services in the Agile Integration Framework that enable communication between the Agile Application Server and disparate systems

Agile Product Portfolio Management

The Agile PLM project management solution that is integrated with the product information in PLM.

AI

Affected Items tab on Change objects in Agile.

Approved Manufacturer Parts List (AML)

List of approved manufacturer parts associated with an item.

Application Programming Interface (API)

A set of routines, protocols, and tools for building software applications. An API expresses a software component in terms of its operations, inputs, outputs, and underlying types.

Assembly

A product assembly lists the parts in a product and shows the substances and materials that comprise those parts. It is linked to specifications that can restrict how much of a particular substance that product assembly may contain

Automated Transfer Orders (ATO)

Content published by Agile PLM users in real time with a content transfer order (CTO) or set up subscribers to automatically create automated transfer orders (ATO) based on a schedule or triggered by a workflow status change.

Baseline

A snapshot of a project, usually in its initial stage, used as a reference for future comparison in Agile Product Portfolio Management.

Bill of Material (BOM)

A hierarchical representation of a product that is made up of other products.

Bill of Substances (BOS)

A hierarchical list of substances that are contained in the parts and assemblies that make up a BOM.

Change Sequence

A series of three-digit numbers (001 through 099) that define the order in which DFCOs (Design File Change Orders) have been published for a specific Design or File Folder. Each Change Sequence number is associated with one specific DFCO and with the specific file folder version number in use when the DFCO is published.

Commodity

A class of goods that is in demand, that is supplied without qualitative differentiation regardless of supplier.

Computer-aided Design (CAD)

The use of computer systems to assist in the creation, modification, analysis, or optimization of a design. CAD software is used to increase the productivity of the designer, improve the quality of design, improve communications through documentation, and to create a database for manufacturing. CAD output is often in the form of electronic files for print, machining, or other manufacturing operations.

Contract (Price)

This is a subclass of the Published Prices class. Contract prices are prices provided by the supplier for a specific item or manufacturer part. This price information applies only for the specified duration and can apply to any project.

Co-Sourcing

The process of leveraging product cost across suppliers.

Deliverable

A unit of work required for a project's success, usually fulfilled by generating a digital file. (Word processing documents, spreadsheet documents, PDFs, presentation documents, and so on.) Deliverables can also be Agile PLM objects and processes. Also called 'content' in Agile Product Portfolio Management.

Design Change Order (DCO)

A Change Order subclass that is available when the effected File Tab is enabled and provides access to all Agile PLM Workflow functions.

Design File Folder

An EC file folder that is integrated with CAD and PLM files, providing full access to PLM Workflow function.

EC Client

A Java-based UI to access, administer and operated the EC solution.

Engineering Collaboration (EC)

An application that provides data and process integration between CAD applications and Agile PLM. It allows CAD designers and engineers to capture and control the data representing a primary source of the product record.

Engineering Collaboration Order (ECO)

An object that carries with it all the proposed changes to a product and/or its BOM. When approved and implemented, the proposed changes become effective.

Extensible Markup Language (XML)

A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable

File Manager

The File Manager manages files in a repository or vault in the file system and provides a place to store and retrieve files locally or remotely. You can install it on the same server as the Agile Application Server or on a separate one. You can also install the File in a redundant configuration and/or distributed across geographic regions.

File Transfer Protocol (FTP)

A standard network protocol used to transfer computer files from one host to another host over a TCP-based network, such as the Internet.

Fully Qualified File Name

The exact name of a file on a computer that is completely specified such that it is unambiguous and cannot be mistaken for any other file on that system.

Fully Qualified Path Name (FQPN)

The full path of a resource, directory or file, stored in a computer. It is composed by the full path to the resource and its syntax depends on the operating system.

Gantt Chart

A project management tool that shows project activities and schedule as a bar chart. The chart lists project activities in sequence, and presents critical information such as the start and end dates of each activity, as well as interdependencies between activities.

Item Master

The product record. It is the entire collection of Items - Parts, Documents, and any other user-defined subclasses of the Items class maintained under change control in the Agile system.

Java Message Service (JMS)

The Java Message Service (JMS) API is a Java Message Oriented Middleware (MOM) API for sending messages between two or more clients.

Lifecycle Phase

Current state in an object's workflow.

LRR

Latest Released Rev - concerning a Part or Document.

Non Cancelable Non Returnable (NCNR)

Applies to an item. NCNR can be a Yes or No, depending on the supplier. You can ask for the NCNR information in the supplier response. This is one of the critical factors in finding the best deal among the supplier responses.

PDX

See [Product Definition eXchange \(PDX\)](#).

PLM

See [Product Lifecycle Management \(PLM\)](#).

Percent allocation or % allocation

The percentage of a resource's time allocated to a specific task or tasks in Agile Product Portfolio Management..

Percent complete or % complete

Amount of time and effort expended on a project measured as a percentage of the time and effort required to complete the whole project. Used in Agile Product Portfolio Management.

Product Definition eXchange (PDX)

A standard designed for the e-supply chain. This standard is based on the XML format because it provides a simple yet powerful and flexible way to encode structured data into a format that is both human- and computer-readable. In PLM, PDX packages contain product content, such as items.

Product Lifecycle Management (PLM)

The process of taking parts/documents from inception to production to phase-out, and all the stages in between.

Protocol

A system of digital rules or agreed-upon format for data exchange within or between devices. It determines the type of error checking and data compression used.

Published Price

This is a subclass of the Published Prices class. Published prices are prices provided by the suppliers in response to an RFQ and published from the project. The published price information can also be used in other projects.

Price

An object that carries with it all the proposed changes to a product and/or its BOM. It can be approved and implemented to make the proposed changes effective.

Price Change Order

It is an object that carries with it all the proposed changes to a price. It can be approved and implemented to make the proposed changes effective.

Quote History

A subclass of the Quote Histories class. Quote history prices are the stored prices from supplier responses that you can use. Any change in the response line of an RFQ is stored in the historical response and is usable at any time.

Request for Information (RFI)

A material declaration that lists the parts in a product assembly and shows the substances and materials contained in the part.

Request for Quote (RFQ)

A standard business process whose purpose is to invite suppliers into a bidding process to bid on specific products or services.

Request for Proposal (RFP)

A solicitation, often made through a bidding process, by an agency or company interested in procuring a commodity, service or valuable asset, to potential suppliers.

Response Line

A response line has information about only one item. The negotiation of price and terms for items is dealt with in a response line.

Resource Pool

A group of users who can be bulk assigned as resources for a particular project or task in Agile Product Portfolio Management.

RFQ Response

A medium of communication between the user and the supplier. One response from a supplier can contain multiple response lines for different items. Price data is added to the project automatically when the supplier submits the response.

Schedule Editor

The scheduling engine that handles updates to the project schedule in Agile Product Portfolio Management.

Schema

In computer programming, a schema is the organization or structure for a database. The activity of data modeling leads to a schema.

Software Development Kit (SDK or "devkit")

A set of software development tools that allows the creation of applications for a certain software package, software framework, hardware platform, computer system, video game console, operating system, or similar development platform.

Sourcing Project

The entry point of sourcing and product pricing. A sourcing project tracks data required for sourcing and pricing, to perform data analysis for effective pricing.

Standard Cost

Applies to an item. This is the market cost of the item. It is site-specific. The standard cost is for a unit.

Supplier

A supplier of one or several commodities.

Target Cost

Applies to item. This is the expected cost of the item by you or the supplier. This can be a percentage of the standard cost. Target cost is for a unit.

Timesheet

The time entry system in Agile Product Portfolio Management, used to track actual hours spent by resources on project activities and to calculate corresponding labor cost.

Top Level Assembly (TLA)

The level in a BOM that indicates the ultimate product being manufactured.

Transfer order

Every time Agile Content Service (ACS) publishes product content, it produces a transfer order that keeps track of what, where, and when product content is transferred.

User Productivity Kit (UPK)

The Oracle online help system used in some Oracle products.

Web Service Extensions (WSX)

A Web service engine that enables communication between Agile Product Lifecycle Management system and disparate internal and external systems.

XML

See [Extensible Markup Language \(XML\)](#).

XML Schema

Description of a type of XML document, typically expressed in terms of constraints on the structure and content of documents of that type, above and beyond the basic syntactical constraints imposed by XML rules.