Oracle SCM Cloud

Using Quality Management

19D
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Social Collaboration: Explained
Preface

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

Using Oracle Applications

Help

Use help icons to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select **Show Help Icons**. Not all pages have help icons. You can also access the Oracle Help Center to find guides and videos.

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

You can also **read about it** instead.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>
Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

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

Overview of Quality Management

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

The key focus of Oracle Quality Management is to:

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

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

Quality Inspection Management

Quality Inspection Management enables you to:

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

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

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

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

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

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

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

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

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

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

Inspection Characteristics

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

You use inspection characteristics to:

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

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

Types of Inspection Characteristics

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

Item Based Inspection Characteristics

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

Non-Item Based Inspection Characteristics

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

**Note:** For a non-item inspection characteristic of type: Character, you can choose not to specify a value set. This enables you to enter free-form text for that characteristic during an inspection. Any result entered for such a characteristic added directly to an inspection or as part of an inspection plan is accepted without an evaluation against specifications, and is recorded for data collection purposes.

You can use the non-item based inspection characteristics for both item and resource related inspections.
Associate an Inspection Characteristic with a Characteristic Group

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

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

Considerations for Updating Inspection Characteristics

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

Updating an Item Based Inspection Characteristic

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

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

Updating a Non-Item Based Inspection Characteristic

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

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

Inspection Levels

An inspection level determines the relative amount and frequency of inspection. You create an inspection level and associate it with a Receiving inspection plan. With inspection levels, you can determine if:

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

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

Related Topics
- Inspection Plans

Examples of Inspection Levels

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

Scenario

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

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

Analysis

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

- Inspection Plans
4 Quality Inspection Plans

Inspection Plans

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

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

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

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

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

Inspection Plan Details

Overview of Inspection Plan Details

Specify the plan details like the plan type, status, organization, and so on.

These plan details are useful to automatically match and associate a plan with an inspection.

Related Topics
- Overview of Ad Hoc and Inline Inspections
Plan Statuses

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

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

Related Topics
- Overview of Ad Hoc and Inline Inspections

Inspection Level in Inspection Plans

By default, all plans have 100 percent inspection level. This means that all units must be inspected, all the time. The only exception is for the Receiving plans, as they allow user-defined inspection levels.

With user-defined inspection levels, you can do selective inspections:
- Sampling: Inspect only a percentage of the total units received for inspection.
- Skip Lots: Skip inspection for some of the receipt lines.

Considerations for Making a Plan Optional

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

Related Topics
- Overview of Ad Hoc and Inline Inspections
How can I copy a plan?

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

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

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

Inspection Plan Criteria

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

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

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

Related Topics

- Overview of Ad Hoc and Inline Inspections

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

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

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

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

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

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

Manage Action Rules

Use inspection action rules to either guide the users or automatically trigger an action based on the inspection results. While creating or modifying an inspection plan, use the inspection characteristics listed in the Specifications tab to create action rules.

An action rule can have one or more conditions. Configure the rule to trigger any of the following actions when the conditions are met:

- Change Material Status: On saving the result, the status of the material changes at the subinventory, locator, lot, or serial level.
- Create a Quality Issue: On saving the result, the application automatically creates a quality issue.
- Display Message: On entering or evaluating the result value, a message appears on the Inspection Results page.
- Raise an Event: On saving the inspection, a business event triggers which you can leverage to call a service or API.
- Send a Notification: On saving the inspection, the specified recipient receives an email notification.

To create a rule, save the inspection plan and do the following:

1. In the Quality Management work area, open the inspection plan, and select Inspection Characteristics.
2. Under inspection characteristics, click Manage Action Rules.
3. Click Create Action Rule.
4. Click the Attributes tab and select the characteristic for the IF condition.
5. Click the Actions tab and select one or more actions to trigger for the Then or Else part of the condition.
6. Save and close the action rule.
7. Close the Manage Action Rules.
8. Save the inspection plan.

You can also duplicate or delete a rule. For example, to delete a rule, from the Manage Action Rules page, select the rule and from the Actions drop-down list, select Delete.
5 Quality Inspections

Overview of Ad Hoc and Inline Inspections

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

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

Ad Hoc Inspections

Ad Hoc Inspections

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

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

While creating an inspection:

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

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

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

Performing Ad Hoc Inspections: Example

This example demonstrates how to:
- Create an inventory inspection
- Collect inspection data

Scenario

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

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

Creating an Inventory Inspection

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

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

Analysis

Collecting Inspection Results

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

How can I inspect Lot control items?

You can do ad hoc inspection of a lot control item during work in process and inventory inspection. While creating the inspection, enter the lot number of the item.

Note: For a work in process inspection, if there are multiple operations, even if an item is a lot control item, you can enter the lot number only in the last operation. Entering the lot number is optional for a work in process inspection and mandatory for an inventory inspection.

Inline Inspections

You can do inline inspections for the receiving and work in process transactions. Based on the inspection results, units are automatically marked as either accepted or rejected.

For Receiving, you may inspect all units or choose to inspect only selected units using sampling and skip lot inspections. However, for Work in Process sampling is always 100%. So partial sampling and skip lot are not applicable.

Inspection Plans and Inline Inspections

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

Skip Lot and Sampling Inspections: Overview

You specify skip lot and sampling settings in an inspection level, and include that inspection level in an inspection plan.

When an inspection plan is leveraged to perform an in-line inspection, all the inspection level settings apply to that inspection. That is, in the inspection level if you have enabled:

- Skip lot, you can do skip lot inspections. That is, the skip lot plan or schedule defines the frequency or ratio of inspected lots and skipped lots.
- Sampling, you can do sampling inspections. That is, you inspect only a percentage of the total units, which will determine if the entire lot is accepted or rejected.
- Both skip lot and sampling, you can do both skip lot and sampling inspections.
Skip Lot Inspections: Explained

In skip lot inspections, the skip lot schedule defines the frequency or ratio of inspected and skipped lots. For example, if the inspection level is set to inspect one out of four lots, one out of four receipt lines for that item, supplier, and inspection level combination will be picked, and listed for inspection.

**Note:** Even if a line is marked for skip lot inspection, you can override the skip quantity inspection setting during inspection and choose to inspect all samples.

Sampling Inspections: Explained

In sampling inspections, a percentage of the total received units are available for inspection. With sampling inspections:

- Even if one sample in the lot fails the inspection, the entire lot is rejected.
- Similarly, if the samples selected for inspection passes the inspection, the entire lot is accepted.

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

Inline Inspection: Worked Example

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

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

**Prerequisites**

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

**Collecting Inspection Results**

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

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

What happens if I remove lines from an inspection?

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

The status of the removed lines appears as pending.

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

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

How can I inspect serial controlled items?

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

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

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

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

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

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

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

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

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

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

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

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

**Note:** If the initiator is also an approver, the initiator’s signature is captured in the inline signature page. Notifications are sent to subsequent approvers to capture the remaining signatures. The new or updated transaction data remains in the pending status until all approvals are complete. You can refresh the E-Signature page to retrieve and view the latest status of the e-record.
You can search and view the existing e-records from the Electronic Records work area. For more information on the Electronic Records work area, see the Oracle SCM Cloud Using E-Signatures and E-Records guide.
6 Quality Issues and Quality Actions

Quality Issue and Action Types

Let’s walk through an overview of the business objects in quality management - quality issues and quality actions.

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

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

A quality action is a necessary activity required to mitigate a quality issue and prevent its further occurrences. Oracle Product Management Cloud provides a predefined list of quality action types, which the administrator can configure. These types include:

- CAPA - Corrective Action
- CAPA - Preventive Action
- CAPA - Supplier Corrective Action
- CAPA - Development Action
- Failure Analysis - Design
- Failure Analysis - Manufacturing
- Audit - Audit Finding

Here are a few things you can do in the Quality Management work area:

Create a quality issue quickly with only essential information such as Organization, Severity and Source. Use the quality issue edit page to add more information such as workflow, proposed dispositions, and descriptions. Mark issues as favorites to find them easily later. Depending on the type of issue, you can manually provide the quality issue number.

Create a quality action quickly with only essential information such as priority and workflow. Use the quality action edit page to add more information such as affected objects, status, and resolution date. Mark quality actions as favorites to find them easily later.

Copy all attachments and affected objects (on the Relationships tab) using the Save As feature on quality issues and actions. All attributes visible on the screen are copied to the new quality object, and the old issue or action is automatically added as a related object. You can select both the object type and the workflow during the Save As process. Remember that a newly created issue or action is always in the Draft status.

When you perform a Save As on a quality issue or action or create a quality action from a quality issue, the Description field in the save As dialog is read-only and the text displays in rich text format.
Actions in Quality Management

Options on the Actions menu of quality objects help you modify and obtain more details about the object.

- **Send**: enables you to notify other users about an issue or action. Select users from the list in the Send dialog box and add a message to the notification, if required, to help solve issues.
- **Launch Graphical Navigator**: opens a graphical display of the business object and its related objects.
- **Create Quality Action**: creates quality actions that link to the quality issue you're working on. Since affected objects and attachments are copied over from the issue, the quality action gets the same affected objects and attachments as the quality issue from which it's created.
- **Create Change Order**: Creates a change order where you can define how you intend to resolve the issue. The change order automatically includes a relationship link to the quality issue or action from which it's created.
- **Delete**: Deletes the selected quality issue or action. Remember that you can't delete nonconformance object types.

Who has access to my quality issue or action?

In addition to the users and roles in the Security list, by default, the creator and the assignee can always access the quality issues or actions. The Security tab automatically displays the creator and assignee.

View Quality Issues and Quality Actions Graphically

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

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

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

- The dependency map lets you map the data to visualization and configure possible interaction and visual properties. The dependency map appears in the Graphical Navigator window. The connector lines depict the different type of connections between the components. A thick line indicates an affected objects relationship. A dotted line indicates a related objects relationship.
- The dependency graph displays the visual cards related to the data and the relationship between the data. The dependency graph appears in the center of the Graphical Navigator window. When you hover over the visual card, the tooltip displays the name of the component. If the cursor is over the attribute of the component, then the tooltip displays the attribute.

You can also click the card to view more details, and directly open the Edit screen for some of the objects.
Workflows in Quality Issues and Actions

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

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

Workflow Templates

Here we learn how you can define workflow templates for a quality action or issue.

Apart from defining workflow templates for Quality Management in the Setup and Maintenance work area, you can also create, edit, view, duplicate and search for them.

Navigate to Setup and Maintenance work area to create a workflow template. Select Product Management from the Setup menu. From the list of Functional Areas, click Quality Issue and Action Management. From the list of Tasks, click Manage Workflow Templates for Product Lifecycle Management. From the Actions menu, click the Create option to create a workflow template. Workflow templates have a predefined sequence of statuses and approval steps. By default, every workflow has the following statuses:

- Open
- Completed

You can define multiple statuses, but ensure you derive them from the following standard status types:

- Open
- Interim Approval
- Approval
- Approval
- Scheduled
- Completed

Set the sequence of the statuses that you define in a workflow template. The sequence you set reflects the order in which the statuses appear on the user interface. On initiating a workflow, the quality issue or action moves either to the next or the previous status, based on the sequence of the statuses. Specifying autopromote and autodemote settings for a workflow status automatically executes promotion and demotion of the workflow.

The Approval Details panel appears only for the Approval and Interim Approval status type and not for the Open, Scheduled and Completed status types. You can edit the status sequences and approval details of a workflow template. For the Approval and Interim Approval status, define Ready-to-use approvers and optional approvers. The list of the approvers appear in a table-view. Select One for a single approver and All for all the approvers in the Reviewers list, to approve the workflow. Duplicating a workflow template copies the Workflow Status and the Status Details table. Notifications are sent to approvers, when the workflow reaches a certain status or on its approval or rejection. You can also export the workflow templates to an Excel sheet.

Note: In Quality Management, predefined workflow templates are read-only. However, the end date is editable to enable deactivation of the predefined workflow template.
Workflow Status

Quality teams and interested parties can track the progress of a quality event through its workflow status. You can’t edit the quality event when it’s in a read-only state like Approval or Closed. When the Approval status of a workflow is rejected, the workflow infotile displays the following message, ‘Rejected by <user name>.

The workflow of a quality issue is based on how it’s used. A quality issue workflow can be any of the following default workflows or one that your administrator creates:

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

The workflow of a quality action is also based on how it's used. A quality action workflow can be any of the following ready-to-use workflows or additional ones that you can define:

- Action expedite workflow
- Action workflow with review
- Action workflow with approval
- CAPA workflow
- Action workflow with preapproval and approval
8D workflow.

The figure shows the workflow statuses of default quality action workflows, based on usage.

- **Approvals and Notifications**
  Workflows help you route notifications to the approvers, and document their feedback. In the Setup and Maintenance work area, you can define new workflow templates with Approval statuses and assign approvers in advance to the Approval status. These approvers get copied into the Approvers list of the workflow instance. If you enable the Signature Password Required feature on issues and actions, ensure that you provide the user name and password during approval. Designated approvers receive approval notifications for quality issues and actions that need review and approval. You can use the object hyperlink in approval notifications to directly open the quality issue or action.
Add Users to Quality Object Workflows using Advanced Search

Use the Advanced Search to search for and assign approvers to workflows of quality issues and actions. Search operators such as Starts With, Ends With, Equals, and Contains support the feature while allowing additional search fields such as Email or Name, within the search, for selecting approvers. This provides flexibility and an additional means to search for and find the required approvers for a quality issue or action approval. The approvers and security search results lists for quality issues and actions display not only the name but the user name and email.

About Working with Quality Issues

Let's see how you can create and manage *quality issues* to study problems in a controlled manner.

1. Navigate to the Quality Management work area. On the Overview page, select Quality Issue from the **Create** menu.
2. Select the type of quality issue you're creating from the **Type** menu.
3. Enter a name in the **Name** field and briefly describe the problem in the **Description** field.
4. Search for the Organization from the Organization list.
5. Select the Severity and the Source of the issue.
6. Select the appropriate Workflow to route the issue.
7. Click **Save and Close**.

After you create a quality issue, add affected objects. The Affected objects tab lists the following types - All, Inspections, Resources, Work Areas, Work Centers, Work Order Operations, Receipts, and Items.

*Note:* The Quality Issues Relationships infotile of affected objects lets you search for and add only items as affected objects. However, on related objects, you can add other object types as well.

Information tiles on the quality issue edit page summarize important data pertaining to the current quality issue. They also help you navigate between details, relationships, workflow, and similar issues. Click any component on the infotile and you're directed to the respective side tabs.

- **Details:** Use this information tile to view the severity of the quality issue and the number of attachments it has. You can add attachments with URL, file, or text formats. Click the tile to open and configure all attributes of the current quality issue.
- **Relationships:** Use this information tile to view, add, and remove relevant affected objects and related objects. Related Objects can include business objects from Quality Management, Innovation Management, or Product Development.
- **Workflow:** Use this information tile to control the status of the quality issue and add approvers.
- **Similar Issues:** Use this infotile to analyze if you can resolve multiple, related issues together, and to avoid replicating any parallel efforts to resolve an issue. You can also identify trends in quality issues, which may be based on a broader problem and require more attention.

The Similar Issues Information tile automatically displays quality issues that have the same affected objects as the current issue. Each time you update the quality issue with new affected objects; the Similar Issues information tile is refreshed. In the Similar Issues list, click any of the quality issues to view them in detail. On the Similar Issues infotile, the count of:

- **Item Match:** shows the number of issues that have the same affected items (affected objects of type item).
Other Matches: shows the number of issues which have the same affected objects, other than items. For example, work order operations, resources, or inspections.

Since there can be issues that have the same items as well as other objects, the All or Both count isn’t necessarily equal to the sum of Item Matches and Other Matches.

Use the Save As option to duplicate existing quality issues, even if they’re read-only.

Note: You can’t do a Save As for production exceptions, since you can log them only from manufacturing.

With the Application Composer, the administrator can modify standard attributes and create additional attributes. It also enables modification of the search, create, and details pages. Use the Application Composer to configure issues and actions by adding additional attributes and business logic.

Create and Route a Quality Issue

Watch video

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

1. Navigate to the Quality Management work area.
2. Go to the Create menu and select the Quality Issue option. For issues relating to a problem with an item, select a quality issue of the problem report type.
   - In the Name field, enter a name for your issue.
   - In the Description field, describe your problem briefly.
   - Search for and find the appropriate organization where the issue occurred.
   - Select values in the Severity and Source fields.
   - Click the Workflow infotile and select a workflow.
   - Click Save and Close. The issue opens on the General Information page.
3. Click open the Relationships infotile and click the Affected Objects side tab.
4. Click Select and Add.
5. Search for and add the affected object that has a problem and click Done.
6. Click Save. The Relationships infotile refreshes to indicate the issue has an affected object.
7. To route, the issue, click Change Status or click the Workflow infotile.

Add Attachments to a Quality Issue

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

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

The quality issue opens on the **General Information** page.

3. Click the **Details** infotile.
4. Click **Attachments > Add Attachment**.
5. From the **Add Attachments** pane, select an **Attachment Type**, say Files, and a **Category** from the lists.
6. Click **Choose Files** and select the required file.
7. Click **Save**. Notice that the Details infotile shows an additional attachment. You have options to download the attachment, delete it or view its contents in detail.
8. Select the attachment row, and click the **Details** icon.
9. To replace the file, click **Choose Files**. Select the required file and click **OK**.
10. Click **Update**.

### About Working with Quality Actions

This topic describes how you can manage corrective and preventive quality actions. You can create, edit and mark quality actions as favorites to find them easily later.

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

From the **Actions** menu, you can create change orders that link to the current quality action, to track the resolution of an issue.

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

- **Details**: Use this information tile to view general information about the quality action. Includes the name, type, priority, and source of the quality action, and the number of attachments it has (attachment formats include URL, File, Text). Click the tile to open and configure all attributes of the current quality action.
- **Relationships**: Use this information tile to view, add, and remove relevant affected objects and related objects.

  Affected objects can include Inventory Inspections, Resource Inspections, Receiving Inspections, WIP Inspections, Resources, Work Areas, Work Centers, Work Order Operations, Receipt, and Items.

  **Note:** The current Quality Actions Relationships information tile of affected objects lets you search and add only items as affected objects.

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

- **Workflow**: Use this information tile to control the quality action status.

### Create a Quality Action from a Quality Issue

[Watch video]
Creating a quality action from a quality issue links the action automatically to the issue. Quality actions help to correct and prevent future occurrences of the issue. If you can’t resolve a quality issue quickly, use a quality action to conduct a more thorough investigation of the problem and a possible resolution. This topic describes how to create a quality action from a quality issue.

1. Navigate to the Quality Management work area.
2. Open an existing issue or select an issue from the Favorites list.

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

3. From the Actions list of the issue, select **Create Quality Action**.
   - Depending on the type of action, you want to perform, select a **Type**.
   - In the **Name** field, enter a name for the quality action.
   - In the **Description** field, enter a brief description.
   - Select a workflow.
   - Click **Save and Close**.

4. Click the Relationships infotile. In the **Affected Objects** tab, the item on the quality issue automatically appears as an affected object. Attachments, if any, are also copied to the quality action.
5. Note that the quality issue appears as a related object in the **Relationships** tab.
6. Click the **Add** icon of the quality issue in the Related Objects tab. A relationship rule between the issue and action is created, such that when the issue is closed, the action closes automatically.
7. Click **Save**.
8. To move to the next status in the workflow, click **Change Status**.

You can modify the resolution date of a quality action created from a quality issue, which has a past resolution date, after creation.

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### Create a Change Order from a Quality Action

**Watch video**

You can manage change orders to take actions on impacted quality issues. This topic describes how to create a change order from a quality action.

1. Navigate to the Quality Management work area.
2. Search for and open a quality action. Alternatively, open a quality action from the Favorites menu.
   - From the **Actions** list, select **Create Change Order**.
   - Select a change order type from the list.
   - Enter a number in the **Number** field. The change order appears as a related object on the Relationships infotile of the quality action.
   - In the **Name** field, enter a name for the change order.
   - In the **Description** field, enter a brief description of the change order.
Click **Save and Edit**. The change order appears as a related object on the Relationships infotile of the quality action.

3. Click **Relationships** and then click the change order to open it.
4. Within the change order, click the Affected objects tab.
5. Click **Add Item** and search for the item that you want to change.
6. Mark or redline changes to the item. Redlining is the process of modifying a product structure using a change order.
7. Click the Relationships tab on the change order. In the window that opens, set a rule to close the quality action on completion of the related change order.
8. In the related Quality Action, click **Select and Add**. A Relationship rule moves an object automatically to the next status of the workflow when a related object advances to its specified status. Dependency rules can be set only for next statuses that are allowed in the workflow. For example, if 'Closed' isn't one of the status allowed at this point in the workflow, you can't move the object to that status.
9. Using the lists on the window create a rule such as: When change order XYZ is Completed, set Quality Action ABC to Closed.
10. Click **OK**.
11. Click **Save and Close**.

### How You Work with Quality Issues and Inspection Results

Here we learn how quality issues and inspection results impact each other in Quality Management.

A quality issue is automatically created for failures during inspections of inventory, resource, or work in process. This process helps in the early identification of **nonconforming** components, and enables you to take quick and necessary corrective actions.

You can log quality issues from manufacturing or from inspections. When you do so, the impacted objects, such as work order operations and receiving inspections are automatically added as affected objects to the quality issue. The lot and serial number of inspected items are specified on the affected items of the quality issue (if the lot or serial is provided in Inspection > Inspections). This helps you to quickly identify the source of the problem.

#### Defective Material in Receiving

Following are examples of defective material in receiving. A receiving agent can log a nonconformance quality issue for defective material, or an out-of-spec inspection result value generated during inline or process receiving inspections.

#### Production Exceptions in Manufacturing

A nonconformance quality issue is automatically logged for an out-of-spec inspection result value generated during inline or process manufacturing inspections.

You can provide the resource instance when you log production exceptions from inside manufacturing work execution. The affected objects detail screen displays the resource instance for resources. This provides a better insight into the specific resource instance that the exception was logged for and also enables better resource instance-specific reporting in OTBI.
How You Work with Quality Issues, Quality Actions, and Change Orders

Let's see how quality issues, quality actions, and change orders work together.

Quality Issues and Quality Actions

You can create and relate a new quality action from a quality issue. This copies affected objects, attachments, and some attributes to the new quality action. You can quickly open a quality action and resolve the issue. Search for and add new item requests in the Draft status, to the affected objects tab of a quality issue or action. You can modify the resolution date of a quality action created from a quality issue, which has a past resolution date, after creation.

Apart from creating relationship rules from actions for related issues, you can create and relate to a quality action from the production exception type quality issue. On the quality action Relationship tab, you can define a dependency rule to close the quality issue upon closing the quality action. If the issue is of production exception type, the 'Add Rule' button doesn't appear at all and hence you can't add a dependency rule.

Note: At all times, production exceptions are read-only in Quality Management.

Change Orders

You can define a relationship between a quality action and a quality issue, which could also be of type production exception. A seamless approach is provided for quality and research teams to work together to manage the change order and resolve the impacted quality issues. You can also create relationship rules from change orders for related quality actions.

Related Topics

- Relationships in Change Orders

Relationships in Quality Events

Let's see how quality issues and actions work with affected objects, related objects, Innovation Management and Product Development.

Affected Objects

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

Relate items appearing in the search results of other organizations as affected objects on quality issues and actions and remember that, access to these organizations is mandatory for this. The functionality is applicable to non-engineering items too.
Related Objects

The related objects tab in the edit quality issue and edit quality action pages lists additional objects. These objects can be from Quality Management, Innovation Management, or Product Development, and provide more context about the current quality issue or action. Related objects are the primary means of relating quality issues to quality actions and change orders through dependency rules.

Relationship Rules

Use the Relationship Rules or Dependency Rules to move an object automatically in its workflow, when the related object moves to its specific status. Relationship rules can close a quality issue upon the closure of its related quality action. It also can close a quality action upon implementation of a related change order.

Use relationship rules to define and manage relationships between quality issues, quality actions, and change orders. Define rules to change the status of one object when the status of a related object is changed to a specific value. For example, you can define that the status of a quality action is set to Closed once the related change order is set to Closed. You can clearly view the status set for each object.

- Manage privilege on the source objects is mandatory to set rules for those objects. Remember that without this privilege, you can’t open the rule editor.
- You can create a rule only if both related objects have a workflow assigned.

How can I create a quality issue or action from an item?

Use the Create Quality Issue or Create Quality Action option from the Actions menu of an item to create a quality issue or action. Once created, the quality issue or action is automatically related to the affected item.

How do I exchange information with design and manufacturing teams on a quality event?

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

Related Topics

- Oracle Social Network Objects in Innovation Management
Secure Access to Quality Issues and Actions

Here we learn how security is supported in Quality Management. Use the Security side tab on issues and actions to add users and roles who can view and search for issues or actions.

The creator and assignees can automatically access the quality objects, but users not listed on the Security tab can't find or view them.

Security is applied at two levels:
- Functional Security
- Data Security

**Functional Security**

Functional security defines the functions you can perform and the pages and objects you can access. For example, it defines who can
- enter the quality management work area
- create a quality action
- create a quality issue

The two types of privileges in Quality Management are:
- Manage - lets you create and edit issues and actions
- Review - provides a read-only view of the issues and actions.

Functional security in Oracle Quality Management is based on the following privileges:
- Manage Quality Action
- Review Quality Action
- Manage Quality Issue
- Review Quality Issue

You can assign these privileges only to the user roles, and not directly to the user.

For example, assign John Smith the Quality Analyst user role (which contains the Manage Quality Action, Review Quality Action, Manage Quality Issue, Review Quality Issue privileges) to create and edit quality issues and actions. The two privileges are assigned to specific task flows and menu actions.

While setting up functional security, consider:
- the privileges assigned and the user roles to which they're assigned
- the users, the functions they can perform, and the functionality and work areas they can access

Oracle delivers some users, user roles, and privileges out of the box. The users and user roles can be adapted and assigned respective privileges.

**Data Security**
Data security defines access to specific data (records) and is applied in addition to functional security. For example, even though you can create and manage quality issues (functional security) as a user you may not see the quality issue "ISSUE46", because the data record isn't visible for your user role (data security).

To enable Data security, you can:

- define data security grants for accessing the issue and action tables for specific user actions
- define data security grants for editing in the issue and action Security tab
- define which users and roles can access a specific issue or action by adding them to the Security tab of the issue or action
- define which user can see which quality issues based on inventory organization assignment
- grant permissions to perform changes depending on the status of the object.

**Data Security Grants on Tables**

Data Security grants on the issue and action tables define each user role. All the users who need to see, update or delete issues and actions, need to be assigned to a user role that grants them access to these data tables with the corresponding user action.

You can grant overall access to the issue and action table, or access to specific user actions like Read or Update.

**Note:** Data security grants can't be defined for the creation of issues and actions, as the data doesn't yet exist. Hence, creation can only be allowed or prevented through functional security.

**Data Security Grants on Application Objects**

Data security grants are essential to add and remove users and roles on the Security tab of issues and actions. Hence, you require an additional data grant for application objects on the table FND_OBJECTS for issues and actions.

**Data Security Grants Based on Users and Roles on Security Side Tab**

The Security side tab for issues and actions makes previously public issues and actions private by assigning them to specific users and roles.

After you add the first user and user role to the Security tab, only respective users and user roles (user assigned to these user roles) have access to these issues and actions. In addition, the Creator and Assignee are automatically granted the privilege to see the issues and actions.

**Permissions to Perform Changes Based on the Object Status**

Depending on the type of data, you can restrict the user from editing the issue or action even if the appropriate privileges and grants are available. For example, if the quality issue or action is:

- logged as Production Exception
- logged as Inspection Non-Conformance
- in a state which prevents editing

You can't edit a record or its relationships; this is to prevent any inconsistencies between production exceptions that you log in manufacturing and the respective quality issues.

You can't delete inspection non-conformances, but you can perform most editing operations.

You can't edit quality issues and actions if they're in certain states, such as waiting for approval, or after approval and closure. This ensures that other quality users can rely on the fact that’s issues and actions that they approve or have approved, won't change.
Quality Issue Visibility Based on Inventory Organization Assignment

Assigning quality issues to an Inventory Organization upon creation indicates where the issue has occurred and restricts access by users of other organizations. You can only see issues which belong to the organization to which you’re assigned. Assigning Inventory Organizations to users using Setup and Maintenance work area gives them access to issues from these organizations.

Access to Affected and Related Objects

You can add items, manufacturing work order operations, manufacturing resources as affected objects to quality issues and actions. Relate Oracle Innovation Management and Product Development objects like ideas, requirements and change orders to the quality issue and action.

Functional and data securities govern quality issues and actions. So, even though you can view a related idea or an affected item, you can’t open it unless you have the appropriate privileges.

For example, to open and see the details of an affected item, you not only are required to have functional privileges to view and manage the item but also have data security grants to the inventory organization.

Attachment Access by Category

When you add an attachment to an issue or action, select the appropriate category to indicate the kind of attachment you intend to add. When you use the Save As action to create a new issue or action, attachment category details are carried over to the new issue or action along with the attachments.

Note: You need an administrator role to manage the attachment categories and their assignment to the issue or action attachment entities.

Enable Attachment Categories

To assign additional attachment categories for quality issues and actions in the Setup and Maintenance work area:

1. Open the task Manage Attachment Entities.
2. Search for the entity ENQ_ACTION (Quality Actions) or ENQ_ISSUE (Quality Issues).
3. Select the entity to see the attachment categories assigned to that specific entity.
4. Add the additional attachment categories that must be made available for selection when you create attachments.

After you enable this feature, you can create attachments and associate them to the categories in the attachments table of issues and actions. By default, only the Miscellaneous attachment category is assigned for quality issues and actions.

Roles and Privileges in Quality Issues and Actions

This topic helps you in setting up and configuring roles and privileges for quality issues and quality actions.

With the role of a quality analyst, you can create, manage and review quality actions and issues and also navigate to the items and change orders in Product Development (with the required privileges). The role of an Application Implementation Consultant has access to perform all functional setup manager-related activities in quality management. The following table lists the roles and privileges in Quality Management.
### Roles

<table>
<thead>
<tr>
<th>Roles</th>
<th>Functions</th>
<th>Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality Analyst</td>
<td>For Quality Management</td>
<td>For Quality Management</td>
</tr>
<tr>
<td></td>
<td>• Create and review quality issues and actions</td>
<td>• Review quality actions and quality issues</td>
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<tr>
<td></td>
<td>• Create and manage quality issues and actions</td>
<td>• Manage quality actions and quality issues</td>
</tr>
<tr>
<td></td>
<td>• View Item on Affected Object Search</td>
<td>• View Item Change Order</td>
</tr>
<tr>
<td>Quality Analyst with access to items and</td>
<td>For Product Management</td>
<td>For Product Management</td>
</tr>
<tr>
<td>change order objects.</td>
<td>• View Create Change Order Action Menu</td>
<td>• Manage Item Change Order</td>
</tr>
<tr>
<td>(Ensure that you add data security grants</td>
<td>• View Item on Affected Object Search</td>
<td>• View Item Change Order</td>
</tr>
<tr>
<td>and the respective item and CO privileges,</td>
<td>• View Item details Name, Description and other details for Items added</td>
<td>• Item Inquiry</td>
</tr>
<tr>
<td>to the role, to see the items and change</td>
<td>on Affected Object.</td>
<td>• Manage Item</td>
</tr>
<tr>
<td>order objects.)</td>
<td></td>
<td>• Review Receiving Receipt Summary.</td>
</tr>
<tr>
<td>Application Implementation Consultant</td>
<td>• Create quality issue and quality action types</td>
<td>• Review quality actions and quality issues</td>
</tr>
<tr>
<td></td>
<td>• Create and manage customers and inventory organizations.</td>
<td>• Manage quality actions and quality issues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Perform functional setup-related activities in quality management.</td>
</tr>
</tbody>
</table>

You can’t edit actions or issues with ONLY the Review privilege. The issue and action screen displays in the read-only mode. You can still:

- view general attributes
- add a comment
- create and participate in an OSN conversation for this object
- view and download attachments
- view details and click links of affected objects and related objects
- launch Graphical Navigator
- view the workflow infotile
- mark as Favorite
- approve (if requested as Approver)
- search
- see actions in the Infolets in the work area Overview page.

**Note:** The creation of quality actions and change orders depend on the respective privileges for quality action and change order.
Access to Product Development Items and Change Orders

If users are unable to view Product Development items and change orders from the Quality Management work area, ensure that you add the following from the Security Console:

Privileges:
- View Item Change Order
- Manage Item

Duty Role:
- Item Inquiry

Data Security Policies:
- EGP_SYSTEM_ITEMS_B
- EGO_ENGINEERING_CHANGES_B

Note: Users with the item privilege EGP_VIEW_ITEM_PRIV can view the Quality tab on the item details page.

User and Role Data Security on Issues and Actions

The security side tab on issues and actions enables you to add users and roles who can view and find this issue or action. The creator and assignees can automatically access the issue or action. Users not listed on the security tab can't find or view the issue or action. Addition of the security tab is a prerequisite to exposing issues and actions on the supplier portal, in the future.

Related Topics
- Create Roles in the Security Console

How You Set Up a Quality Issue Type

Here's how you set up quality object types. Quality object types are created as subtypes of an existing quality type. This task requires that you must have either the role of a Supply Chain Administrator or an Application Implementation Consultant.

1. Navigate to the Quality Management work area.
2. On the Overview page, click the Search panel.
3. From the Setup section, select Manage Quality Issue Types.
4. In the View menu click the Expand All option to see all the defined quality issue type.
5. Select an issue type and click the New button to create a subtype of the existing quality issue type.
6. Enter field values in the Create Quality Type dialog box.
   - **Name**: the title that the administrator can see
   - **Label**: the title the users can see
   - **Object Creation Allowed**: set to Yes or No to define if users can see this type in the Create menu
   - **Code**: an internal unique identifier for the object
7. **Description**: describes the purpose of this type to the administrator.

7. Click **Save and Close**.

You have successfully created a quality issue type. Use the **New, Edit and Delete** icons to create additional object types and make changes.

Remember to check if issues and actions are in use before you delete them. On selecting a quality issue or action type that's in use, an error message informs you that you can't delete it since it's already in use. Additionally, the **Delete** icon is automatically disabled on selecting a row of the type that you can't delete.

---

### Set Up Autonumbering Schema for Quality Objects

Number generation is the process of generating numbers for objects that you create. Organizations can define their own number range to suit specific requirements.

Number generation methods are predefined by the administrator and you, as an administrator, can configure the autonumber schema for each quality object type. Choose either the User-defined or the Sequence generated method while creating a quality issue or action type.

- **User-defined method**: In the User-defined method, the field is editable and you, as the user, can type in the number. A message and a highlighted number field warn you if a conflict arises. You then type in another number.
- **Sequence-generated method**: In the Sequence-generated method, the number field is pre-populated and non-editable. If the number already exists or you cancel the creation of the quality issue, the number is used up. For the next issue or action you create, the number, according to the sequence chosen, is automatically generated. The application continues to generate the next numbers until there is no conflict or the pre-defined maximum number of attempts limit is met. If you don't generate a number within this limit, the last generated number displays with a warning message and you can only cancel the creation of the quality object.

All the quality issue and action types let you set the number generation method. For the root quality issue and action types, you have only the user-defined and sequence-generated options and not the Inherited from Parent option. When you select the sequence-generated method, provide the **Prefix**, **Suffix** and **Increment Number Range** for auto-number schemas and assign them to the existing type of quality issue or action that you create.

---

### How You Set Up the Number Generation Method for a Quality Issue or Action Type

Let's set up a method to generate numbers for a quality issue or action type. Remember that you must either be a Supply Chain Application Administrator or an Application Implementation Consultant to proceed with this task.

1. Navigate to the **Quality Management** work area.
2. On the Overview page, click the **Search** panel.
3. In the Setup section, select **Manage Quality Issue Types**.
4. On the **View** menu click the **Expand All** option to see all the defined quality type issues.
5. Select a quality type and click the **New** button to create a subtype of the existing quality issue type.
6. Enter field values in the Create Quality Type dialog box.
   - **Name**: the title that the administrator can see
Set Up Quality Issues and Quality Actions

1. **Label**: the title the users can see
2. **Object Creation Allowed**: set to Yes or No to define if users can see this type in the Create menu
3. **Code**: an internal unique identifier to the object
4. **Description**: describes the purpose of this type to the administrator.

7. **Click Save and Close**.

Now that you have successfully created a quality issue type, you can move on to defining a number generation method.

8. **Click the Edit icon to open the Edit Quality Action Type page**.

   a. In the **Number Generation Method** field, select an option to define the method that will appear in the quality issue type.

      - **Inherited from the Parent**: inherits the method from the parent object.
      - **User-defined**: lets you, as the user, type in the number you want to, at the time of creation.
      - **Sequence-generated**: the values appear in a specified sequence defined by the increment. On selecting the Sequence-generated option, enter values for:

         - **Prefix**: text that automatically appears before the number
         - **Suffix**: text that automatically appears after the number
         - **Starting Number**: the number you start with
         - **Increment**: the number you want to set the increment by
         - **Maximum Number of Attempts**: the number of attempts the application must attempt to autogenerate a unique number.

      Remember that every time you change the required values, the numbering sequence is reset to start from the starting number. To continue with the next number (before your update in the sequence-generation set up), you must note and enter the next number as the starting number.

   b. **Click Save and Close**.

After you configure the method to generate the numbers, the quality objects that you create display the numbers based on the type of quality issue or action that you choose.

**Note**: Manufacturing and Inspections use internal APIs to create exceptions and non-conformances. If you (as the administrator) set respective types to the User-defined or Inherited from parent options, the process of creating them can fail through the internal APIs. So, ensure that you use these settings ONLY for legacy data import - if at all. Oracle recommends to always set them to Sequence-generated.

## Configure Quality Event Lookups

This topic describes how to set up quality issues and quality actions lookup values in the Setup and Maintenance work area.

The **Setup and Maintenance** work area provides tasks for configuring and enabling modules in Oracle Cloud Applications. In Setup and Maintenance, search for the Manage Quality Issue and Action Lookups task. The Manage Quality Issue and Action Lookups task requires the Setup Product Quality privilege, which is part of the Application Implementation Consultant role.
Lookup types with the configuration level `System` don't let you add or delete lookup codes. However, you can edit the `Meaning` and `Description` fields of the existing lookup codes. The following lookup types exist but aren't used.

1. `ORA_ENQ_ASSOCIATION_TYPE`
2. `ORA_ENQ_AFFECTED_OBJECT_TYPE`

The following table details the lookups available in Quality Management.

<table>
<thead>
<tr>
<th>Module</th>
<th>Lookup Type</th>
<th>Lookup Code Meaning</th>
<th>Description</th>
<th>Configuration Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issues</td>
<td>ORA_ENQ_DISPOSITION</td>
<td>Quality Disposition Type</td>
<td>The various designations or classifications that are available for you to assign to a quality issue to resolve the issue.</td>
<td>User</td>
</tr>
<tr>
<td>Issues</td>
<td>ORA_ENQ_SEVERITY</td>
<td>Quality Issue Severity</td>
<td>The level or degree of the quality issue for you to prioritize when and how to resolve the issue.</td>
<td>User</td>
</tr>
<tr>
<td>Actions</td>
<td>ORA_ENQ_PRIORITY</td>
<td>Quality Action Priority</td>
<td>The rank of the quality action to decide when and how to resolve an issue.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td>ORA_ENQ_AFFECTED_OBJECT_STATUS</td>
<td>Affected Object Status</td>
<td>The possible stages to set for an affected object.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td>ORA_ENQ_IMPACT_TYPE</td>
<td>Affected Object Quality Issue Impact Type</td>
<td>The level of involvement that the quality issue or action affects the object.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td>ORA_ENQLIKE_OF_RECURRANCE</td>
<td>Likelihood of recurrence</td>
<td>The level of likelihood of recurrence of the quality issues and actions.</td>
<td>User</td>
</tr>
<tr>
<td>Common</td>
<td>ORA_ENQ_OBJECT_STATUS</td>
<td>Quality Object Status</td>
<td>The possible stages to set for a quality object.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td>ORA_ENQ_OBJECT_TYPE</td>
<td>Quality Object Type</td>
<td>The different classifications available for quality objects.</td>
<td>System</td>
</tr>
<tr>
<td>Common</td>
<td>ORA_ENQ_SOURCE</td>
<td>Quality Source</td>
<td>The area of the business process</td>
<td>User</td>
</tr>
</tbody>
</table>
Create a Quality Management Workflow

Watch video

In this procedure you see how to create a quality management workflow. You must either be a Supply Chain Application Administrator or an Application Implementation Consultant to do this task.

1. Navigate to the **Setup and Maintenance** work area and select Product Management from the list of offerings.
2. From the list of Functional areas, select Quality Issue and Action Management.
3. In the Task pane, click the **Manage Workflows Statuses for Product Lifecycle Management** task.
   
   a. Click **Create (+)** to create a workflow status. In the Create Workflow Status dialog box, enter the required values.
      
      i. Enter a name in the **Status** field - For example: Executive Approval.
      ii. Select a type from the **Status Type** menu. For example: Approval. You can choose a type from the following options: Open, Interim Approval, Approval, Completed.
      iii. Give a brief description in the **Description** field.
      iv. Click **Save and Close**.
   
   b. Click **Save and Close** to sign out from the Manage Workflow Statuses for Product Lifecycle Management.
4. In the Task pane, click the **Manage Workflow Templates for Product Lifecycle Management** task.
   
   a. Click **Create (+)** to create a workflow template or duplicate an existing template. In the Edit Workflow Template page, fill in the required values.
      
      i. Enter a name in the **Name** field. For example: Executive Approval Workflow.
      ii. The Internal Name field is automatically filled.
      iii. Enter a brief description in the **Description** field.
      iv. Select an object from the **Applicable To** menu to which the template is applicable (in this example select Quality Issue).
b. In the Workflow Status Sequence panel, click **Create (+)** to add a status to the sequence. Add multiple different statuses to the sequence to create a workflow template.
   
   i. Enter values in the Sequence Number field to set a sequence. For example: 10, 20, 30.
   
   ii. Select a value for the **Status** field. For example: Open, Executive Approval, Completed.
   
   iii. The Status Type field is automatically filled with the type.
   
   iv. The status can be of the following type: Open, Interim Approval (optional), Approval (optional), Completed. Note that the status that you choose in the Next Status is what defines the status to which the user is allowed to move the quality object.
   
   v. Select a **Next Status** from the menu.
   
   vi. In the Allow Updates column, selecting the check box indicates that you can update the issue or action while it’s in this status.
   
   vii. Promotion or Demotion: Set the Promotion or Demotion status that an object will automatically go to, once it’s Approved or Rejected by the Approver or Approvers.

c. Select the Approval type row of the Workflow Status Sequence and it displays the following fields in the Status Details panel.
   
   i. In the Response Required From column, select an option: **One or All**, indicating that a response is required from either one or all of the assigned approvers to complete the process of approval.
   
   ii. Click the icon in the Assigned To column to assign a user as an approver.
   
   iii. In the Assigned to dialog box, click Add (+) to add one or more users.
   
   iv. Click the **Search** button. In the Select and Add: Assigned To dialog box that appears enter a name and search for it. Select the name from the search result and click OK.

5. Navigate to the Quality Management work area to search for the workflow template that was created for a quality issue.
   
   a. Click the **Create (+)** menu and select the **Quality Issue** option.
   
   b. In the Create Quality Issue dialog box, click the **Workflow** menu and notice that the Executive Approval Workflow (that you created) appears as an option.

---

**Configure Password Policy for Approvals**

You can set up a password policy to authenticate the approval process for quality issues and actions. This ensures that approvers are prompted to enter their login credentials before they approve the quality issue or action. The credentials are also used to audit the approval process.

1. In the **Setup and Maintenance** work area, select the Product Management offering.
2. Run the **Manage Task Configurations for Supply Chain Management** task.
3. Select **WorkflowStatusUserDefinedApprovalTask**.
4. Click the **Edit task** icon.
5. Click **Access** and expand **Actions**.
6. Select **Password Required** from the Signature Policy drop-down list to authenticate the approval process.

---

**Note:** If the quality issue or action is already in the Approval status when the password policy is enabled, the user doesn't receive the authentication prompt. If the quality issue or action is in the Open status and the password policy is enabled, the user receives the authentication prompt when the quality issue or action reaches the Approval status.
How do I update customer information in Quality Management Cloud?

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

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

How do I manage organizations in Quality Management Cloud?

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

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

Related Topics
- Data Access
- Assign Data Access to Users

Configure Application Pages Using Application Composer

Application Composer is a browser-based tool that an administrator can use to configure applications. Use this tool to make data model changes that previously required application developers. Administrators can create and configure layouts to meet business requirements.

For example, create a new object and related fields and then create new interface pages to expose that object to users. Application Composer is a design-at-runtime tool, which means that you can navigate to Application Composer directly from a Cloud application, make your changes, and see most changes take immediate effect, without having to sign back into the application.

Use Application Composer to:
- Edit the display label and help text of standard fields;
- Create conditional layouts;
- Assign fields to layouts;
- Create fields of different types (such as text, number, date, choice list, and check box) and add them to standard and administrator-defined objects;
• Define application actions using validation rules, triggers, and functions;
• Set field-level and object-level validation rules.

Attributes, or fields, must be assigned to a layout in order for the application user to see and work with them. A conditional statement assigned to a layout determines when it’s displayed and who can see it.

**Note:** Application Composer replaces such configuration tools as Data Composer and Page Composer. Previously created objects, attributes and other configured entities are all carried over when you upgrade your Oracle PLM Cloud applications. However, administrator-configured entities aren’t initially visible to the user. Previously configured attributes become visible again when they’re added to a layout.

**Note:** Application Composer is supported for use only in English. Additionally, Application Composer isn’t supported for use with iPad devices.

You can configure the landing page, creation page and details page for quality issues and actions. Additional Application Composer attributes are now available providing more flexibility to define quality issues and actions and anticipates this as a prerequisite to importing legacy data with many attributes. The list of attributes available are:

- 350 Text, Check box, and Choice List fields
- 200 Number, Currency, and Percentage fields
- 50 Date and Datetime fields
- and 25 Long Text fields.

The Application Composer enables you to create actions, buttons and URL tabs on issues and actions. You can import issue and action configurations from one environment to another. This enables you (as an administrator) to configure user interface and business logic to better suit user needs. They trigger administrator-defined actions and allow you to link and display objects as side tabs.

### Create a Quality Object Using Groovy Script

In Application Composer, use groovy scripting to create quality objects. This means you can create, associate, and update quality issues and actions and their related data from within other Application Composer enabled objects. Let’s say you have a business process that requires all quality issues to have a corresponding CAPA. To help enforce this process, you setup a groovy script action that creates a CAPA when the user clicks a button in the issue.

1. Navigate to the **Application Composer**.

   **Note:** Ensure that you’re in a sandbox.

2. Select the **ERP and SCM Cloud** option from the **Application** list.
3. Select the **Quality** check box in the Object tags.
4. Expand Standard Objects > Quality Issue > Server Scripts to create an object function script.
5. To create an object function script:
   b. On the Create Object Function page, enter a name in the **Function Name** field. For example: createCAPA.
   c. In the Edit Script pane, enter groovy script details:
      ```groovy
      def qaView = newView('Action')
      def newQA = qaView.createRow()
      newQA.setAttribute('ActionType', 5120)
      ```
For standard types, you get the ActionTypeId from the following table:

Quality Issues

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Failure - Item</td>
<td>ORA_ENQ_QI_DF_ITEM</td>
<td>1304</td>
</tr>
<tr>
<td>Maintenance - Component</td>
<td>ORA_ENQ_MNT_COMPONENT</td>
<td>1274</td>
</tr>
<tr>
<td>Maintenance - Miscellaneous</td>
<td>ORA_ENQ_MNT_MISCELLANEOUS</td>
<td>1290</td>
</tr>
<tr>
<td>Maintenance - Resource</td>
<td>ORA_ENQ_MNTRESOURCE</td>
<td>1278</td>
</tr>
<tr>
<td>Maintenance - Supplier Operation</td>
<td>ORA_ENQ_MNT_SUPPLIER_OPERATION</td>
<td>1294</td>
</tr>
<tr>
<td>Maintenance - Work Area</td>
<td>ORA_ENQ_MNT_WORK_AREA</td>
<td>1286</td>
</tr>
<tr>
<td>Maintenance - Work Center</td>
<td>ORA_ENQ_MNT_Work_CENTER</td>
<td>1282</td>
</tr>
<tr>
<td>Manufacturing - Component</td>
<td>ORA_ENQ_COMPONENT</td>
<td>1210</td>
</tr>
<tr>
<td>Manufacturing - Miscellaneous</td>
<td>ORA_ENQ_MISCELLANEOUS</td>
<td>1250</td>
</tr>
<tr>
<td>Manufacturing - Resource</td>
<td>ORA_ENQRESOURCE</td>
<td>1220</td>
</tr>
<tr>
<td>Manufacturing - Supplier Operation</td>
<td>ORA_ENQ_SUPPLIER_OPERATION</td>
<td>1215</td>
</tr>
<tr>
<td>Manufacturing - Work Area</td>
<td>ORA_ENQ_WORK_AREA</td>
<td>1240</td>
</tr>
<tr>
<td>Manufacturing - Work Center</td>
<td>ORA_ENQ_WORK_CENTER</td>
<td>1230</td>
</tr>
<tr>
<td>Non-Conformance - Audit Finding</td>
<td>ORA_ENQ_QI_NC_AUDIT_FINDING</td>
<td>1112</td>
</tr>
<tr>
<td>Non-Conformance - Development Item</td>
<td>ORA_ENQ_QI_NC_DEV_ITEM</td>
<td>1108</td>
</tr>
<tr>
<td>Non-Conformance - Inventory</td>
<td>ORA_ENQ_QI_NC_INVENTORY</td>
<td>1116</td>
</tr>
</tbody>
</table>
### Quality Issues

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Conformance - Outside Processing</td>
<td>ORA_ENQ_QI_NC_OSP</td>
<td>1104</td>
</tr>
<tr>
<td>Non-Conformance - Receiving</td>
<td>ORA_ENQ_QI_NC_REceiving</td>
<td>1120</td>
</tr>
<tr>
<td>Non-Conformance - Resource</td>
<td>ORA_ENQ_QI_NC_Resource</td>
<td>1124</td>
</tr>
<tr>
<td>Non-Conformance - Work in Process</td>
<td>ORA_ENQ_QI_NC_WORK_IN_PROCESS</td>
<td>1128</td>
</tr>
<tr>
<td>Problem Report - Item</td>
<td>ORA_ENQ_QI_PR_ITEM</td>
<td>1404</td>
</tr>
<tr>
<td>Problem Report - Document</td>
<td>ORA_ENQ_QI_PR_SUPPLIER</td>
<td>1408</td>
</tr>
</tbody>
</table>

### Quality Actions

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAPA - Corrective Action</td>
<td>ORA_ENQ_CORRECTIVE</td>
<td>5110</td>
</tr>
<tr>
<td>CAPA - Preventive Action</td>
<td>ORA_ENQ_PREVENTIVE</td>
<td>5120</td>
</tr>
<tr>
<td>CAPA - Supplier Corrective Action</td>
<td>ORA_ENQ_SUPPLIER_CORRECTIVE</td>
<td>5130</td>
</tr>
<tr>
<td>CAPA - Development Action</td>
<td>ORA_ENQ_DEVELOPMENT</td>
<td>5140</td>
</tr>
<tr>
<td>Failure Analysis - Design</td>
<td>ORA_ENQ_DESIGN</td>
<td>5210</td>
</tr>
<tr>
<td>Failure Analysis - Manufacturing</td>
<td>ORA_ENQ_ACTIONS_MANUFACTURING</td>
<td>5220</td>
</tr>
<tr>
<td>Audit - Audit Finding</td>
<td>ORA_ENQ_AUDIT_FINDING</td>
<td>5310</td>
</tr>
</tbody>
</table>

d. Click **Save and Close**

Let's create an action link, since the created object functions work only if attached to an action.
6. Click Action and Links.
   a. On the Quality Issue: Create Action or Link page, click the **Create** button. The display label is what you see on the button that you click. Enter a value. For example: CreateCAPA. Internal names are automatically filled.
   b. Select the Method Name that you created earlier in the Server Script node.
   c. Click **Save**.

   The action works only if it’s added to a page layout. So, let’s add an action to the page.

7. Click Pages.
   a. On the Quality Issue: Pages page, go to Details Page Layouts panel and click the **Duplicate** button to create a duplicate layout.
   b. Enter a name in the **New Layout Name** field. For Example: Default custom layout.
   c. Click **Save and Edit**.
   d. On the Details Layout: Default custom layout page, click the **Edit** icon next to the **Actions** menu. You see that the action name is available as a button and as an action. Here’s where you choose how the action name must appear - as a button or as an option on the **Actions** menu.
   e. Move the action name to the Selected Buttons or Selected Actions panel.
   f. Click **Save and Close**.
   g. Click **Done**. You can see that the action name appears as a button next to the **Actions** menu or as an option on the **Actions** menu.

Now, let’s check if the settings that were set works.

8. Navigate to the Quality Management work area.
   a. Create a new quality issue, filling in the required fields. Once the issue is created, click the new CreateCAPA button.
   b. Run a search for quality actions and the newly created quality action appears in the search results. You can see that the button created the new CAPA using the groovy script in the quality issue.
8 OTBI Reports in Quality Management

Generating OTBI Reports: Explained

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

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

- Data model
- Spreadsheet
- Subject area

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

Related Topics

- Social Collaboration: Explained
- Overview of Ad Hoc and Inline Inspections

Navigate from OTBI to Quality Issues and Actions

Oracle Transactional Business Intelligence (OTBI) provides a deep perception of situations in quality issues and actions. Navigating from OTBI to the actual record in Quality Management helps you take quick and appropriate action on a specific quality issue or action.

OTBI folders are accessible from the Reports and Analytics side tab. In the Overview page of a quality issue or action, click the Browse Catalog icon to navigate to the OTBI folders.

1. Use Navigator to go to Tools > Reports and Analytics.
2. In the panel that opens, click Browse Catalog. The Oracle Business Intelligence page opens.
3. From the Catalog pane, click the New list. Select the Analysis option.
4. From the panel that opens, select a Subject Area. For example: Enterprise Quality Management: Enterprise Quality Issues Real Time.
5. Double-click column names in the Subject Areas pane to add them to the analysis.
6. Create a query in answers that contains ID. For example: If you're creating navigation to Quality Management, Quality Issue object, Issue Id must be available in the query.
7. Set Issues ID to a Number Format.
8. Navigate to the Column Properties window.
9. Click Interaction. Select Action Links from Primary Interaction list and add a new Action Link.
10. Click the New Action Link and select Navigate to a Web Page. The Create New Action window appears.
11. In the Create New Action window, enter the URL of the work area that you want to navigate from OTBI.

For quality actions, use https://<hostname>/fscmUI/faces/deeplink?objType=ACTIONS&action=EDIT&objKey=actionId=@@3
For quality issues, use https://<hostname>/fscmUI/faces/deeplink?objType=ISSUES&action=EDIT&objKey=issueld=@@{3}

12. Add a new parameter and notice that a new row appears in the Define Parameter table.
13. Edit the newly added parameter for Prompt with value as 'objKey'.
14. Click the Value list and select Column Value.
15. Select the "Quality Issues Details"."Issue Id" for quality issues and "Quality Actions Details"."ActionId" for quality actions from Value list.
16. Check the Fixed and Hidden Check boxes.
17. Click Options and the Action Options window opens.
18. Check the 'Open in New Window' check box and click OK. You return to the Create New Action window.
19. Click OK. You return to the New Action Link window.
20. Click OK. You return to the Column Properties window.
21. Check the 'Don’t display in a pop-up if only one action link is available at runtime' check box.
22. Click OK.
23. Save the report. Click Results to display the report values.
24. Click the link and the quality issue or action opens in the Edit page in Quality Management.

**Note:** The link to the quality issue or action is enabled only if the deep link is configured in reports.

**Related Topics**
- SCM Subject Areas in Oracle Transactional Business Intelligence
- Register Business Intelligence to Support Deep Linking
9 Social Collaboration

Social Collaboration: Explained

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

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

Related Topics

- Overview of Ad Hoc and Inline Inspections
- Generating OTBI Reports: Explained
Glossary

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

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

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

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

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

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

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

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

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

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

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

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

skip lot inspection
A procedure that reduces the frequency of inspection for incoming lots (example, receipt lines) by specifying the ratio of lots to inspect and skipped as accepted.

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