This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

The business names used in this documentation are fictitious, and are not intended to identify any real companies currently or previously in existence.
# Contents

<table>
<thead>
<tr>
<th>Preface</th>
<th>i</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1 Introduction to Quality Management Cloud</strong></td>
<td>1</td>
</tr>
<tr>
<td>Quality Management: Overview</td>
<td>1</td>
</tr>
<tr>
<td><strong>2 Quality Inspection Characteristics</strong></td>
<td>3</td>
</tr>
<tr>
<td>Inspection Characteristics: Explained</td>
<td>3</td>
</tr>
<tr>
<td>Types of Inspection Characteristics: Explained</td>
<td>3</td>
</tr>
<tr>
<td>Associating an Inspection Characteristic with a Characteristic Group: Explained</td>
<td>3</td>
</tr>
<tr>
<td>Updating Inspection Characteristics: Points to Consider</td>
<td>4</td>
</tr>
<tr>
<td><strong>3 Quality Inspection Levels</strong></td>
<td>5</td>
</tr>
<tr>
<td>Inspection Levels: Explained</td>
<td>5</td>
</tr>
<tr>
<td>Inspection Levels: Examples</td>
<td>5</td>
</tr>
<tr>
<td><strong>4 Quality Inspection Plans</strong></td>
<td>7</td>
</tr>
<tr>
<td>Inspection Plans: Explained</td>
<td>7</td>
</tr>
<tr>
<td>Inspection Plan Details</td>
<td>7</td>
</tr>
<tr>
<td>Can I use multiple versions of the same inspection plan at the same time?</td>
<td>9</td>
</tr>
<tr>
<td>Inspection Plan Specifications: Explained</td>
<td>9</td>
</tr>
<tr>
<td>Managing Action Rules: Explained</td>
<td>9</td>
</tr>
<tr>
<td><strong>5 Quality Inspections</strong></td>
<td>11</td>
</tr>
<tr>
<td>Ad Hoc and Inline Inspections: Overview</td>
<td>11</td>
</tr>
<tr>
<td>Ad Hoc Inspections</td>
<td>11</td>
</tr>
<tr>
<td>How can I inspect Lot control items?</td>
<td>13</td>
</tr>
<tr>
<td>Inline Inspections</td>
<td>13</td>
</tr>
<tr>
<td>What happens if I remove lines from an inspection?</td>
<td>15</td>
</tr>
<tr>
<td>How can I inspect a line that is already rejected in an inspection?</td>
<td>15</td>
</tr>
<tr>
<td>How can I inspect serial controlled items?</td>
<td>15</td>
</tr>
<tr>
<td>Electronic Signatures and Electronic Records for Quality Dispositions</td>
<td>15</td>
</tr>
</tbody>
</table>
6 Social Collaboration

Social Collaboration: Explained

7 Generating OTBI Reports

Generating OTBI Reports: Explained

8 Working with Quality Issues and Quality Actions

Quality Issues and Actions: Overview
How do I know who has access to my quality issues or actions?
How can I create a quality issue or action from an item?
Working with Quality Issues: Explained
Creating and Routing a Quality Issue
Adding Attachments to a Quality Issue: Procedure
Quality Issues and Inspection Results: How They Work Together
Working with Quality Actions: Explained
Viewing Quality Issues and Quality Actions Graphically: Explained
Relationships in Quality Events: Explained
Workflows in Quality Issue and Action Management: Explained
Configuring Action Links to Objects from Reports: Procedure
Quality Issues, Quality Actions, and Change Orders: How They Work Together
Creating a Change Order from a Quality Action
Creating a Quality Action from a Quality Issue
Security in Quality Management: Explained
Application Composer in Quality Management: Overview
How do I exchange information with design and manufacturing teams on a quality event?

9 Setting Up Quality Issues and Quality Actions

Security for Quality: Overview
Roles and Privileges in Quality Issues and Action Management: Explained
Quality Event Lookup Values: Explained
How do I update customer information in Quality Management Cloud?
How do I manage organizations in Quality Management Cloud?
Preface

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

Using Oracle Applications

Using 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 Oracle Applications Help.

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

You can also read Using Applications Help.

Additional Resources

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

- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

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

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

Quality Management: Overview

Oracle’s Quality Management Cloud provides a unified platform for enabling quality visibility, collaboration, and execution. The key focus of Oracle Quality Management is to:

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

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

Quality Inspection Management

Quality Inspection Management enables you to:

1. Define quality requirements for both materials and resources, which has been implemented through the definition of:
   - Inspection Levels for Receiving
   - Inspection Characteristics
   - Work in Process Inspection Plans
   - Receiving Inspection Plans
   - Inventory Inspection Plans
   - Resource Inspection Plans
2. Allow users to perform inspections at key points in the supply process
   - In-line Work in Process Inspections
   - In-line Receiving Inspections
   - Ad-hoc Inventory Inspections
   - Ad-hoc Resource Inspections
   - Ad-hoc Work in Process Inspections
3. Allow users to analyze the results of inspections in order to identify failures or non-conformances. Infolets for Work in process Inspection Failures and Receiving Inspection Failures are available out of the box, and OTBI is available for ad-hoc reporting.
4. Allow users to leverage Oracle Social Network functionality to collaborate in defining requirements and to discuss quality inspection results.
Quality Issue and Action Management

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

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

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

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

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

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

Inspection Characteristics: Explained

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

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

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

Types of Inspection Characteristics: Explained

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

Item Based Inspection Characteristics

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

Non-Item Based Inspection Characteristics

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

Note: For a non-item inspection characteristic of type: Character, you can choose not to specify a value set. That allows 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.
Associating an Inspection Characteristic with a Characteristic Group: Explained

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

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

Updating Inspection Characteristics: Points to Consider

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

Updating an Item Based Inspection Characteristic

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

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

Updating a Non-Item Based Inspection Characteristic

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

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

Inspection Levels: Explained

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

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

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

Related Topics

- Inspection Plans: Explained

Inspection Levels: Examples

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

Scenario

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

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

Analysis

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

- Inspection Plans: Explained
4 Quality Inspection Plans

Inspection Plans: Explained

An inspection plan contains inspection elements that represent the specific data that you want to collect and report on. It also contains information about when and how often you collect that data. The following table lists the four types of inspection plans and their use:

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

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

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

Inspection Plan Details

Inspection Plan Details: Explained

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

Related Topics

- Ad Hoc and Inline Inspections: Overview

Plan Statuses: Explained

You can set the plan status to one of these statuses:

This table lists the various statuses available for the plan.
Plan Status | Description
--- | ---
New | A plan that is not yet approved.
On hold | Put an approved plan on hold when you want to make it temporarily unusable.
Obsolete | You can make changes and approve the plan to use it again.
Approved | You cannot use or revive an obsolete plan. You can only use approved plans for inspections.

Related Topics

- Ad Hoc and Inline Inspections: Overview

Inspection Level in Inspection Plans: Explained

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.

Making a Plan Optional: Points to Consider

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

Related Topics

- Ad Hoc and Inline Inspections: Overview

How can I copy a plan?

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

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

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

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

<table>
<thead>
<tr>
<th>Inspection Plan Type</th>
<th>Inspection Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving inspection plans</td>
<td>• Suppliers and supplier locations for the document type: Purchase order</td>
</tr>
<tr>
<td></td>
<td>• Source organization for document types: In-transit shipment, Return material authorization, and Transfer order</td>
</tr>
<tr>
<td>Inventory inspection plans</td>
<td>Subinventory and locators</td>
</tr>
<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
- Ad Hoc and Inline Inspections: Overview

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

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

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

Inspection Plan Specifications: Explained

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

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

For other plans you can add both item and non-item inspection characteristics.
Managing Action Rules: Explained

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

Ad Hoc and Inline Inspections: Overview

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

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

Ad Hoc Inspections

Ad Hoc Inspections: Explained

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

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

While creating an inspection:

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

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

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

Performing Ad Hoc Inspections: Example

This example demonstrates how to:

- Create an inventory inspection
- Collect inspection data

Scenario

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

Prerequisites

- Create the required inspection 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

Inline Inspections: Explained

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

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

Inspection Plans and Inline Inspections

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

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 appears in the list.

4. Click Inspect. The Inspect Lines page opens.

5. Select the item and click Enter Quality Results. The Inspect page for the selected receipt number appears.

6. As 10 percent is the sampling inspection level, you will see three samples randomly selected from the total 30 received units.

7. Enter inspection results and click Save and Close. The Inspect Lines page opens again with inspection status of line as either accept or reject. That is, if all the samples pass the inspection, then all the 30 received units are accepted. However, even if one sample fails the inspection, all the 30 units are automatically rejected.

8. Finish inspection of other items and click Submit.

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

What happens if I remove lines from an inspection?

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

The status of the removed lines appears as pending.

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

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

How can I inspect serial controlled items?

You can inspect serial controlled items during work in 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.
Social Collaboration: Explained

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

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

Related Topics

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

Generating OTBI Reports: Explained

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

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

- Data model
- Spreadsheet
- Subject area

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

Related Topics

- Social Collaboration: Explained
- Ad Hoc and Inline Inspections: Overview
8 Working with Quality Issues and Quality Actions

Quality Issues and Actions: Overview

This topic gives you an overview of the business objects in quality management - quality issue and quality action.

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

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

In the Quality Management work area, you can create a quality issue quickly with only essential information. Use the quality issue edit page to add more information such as workflow, proposed dispositions, and descriptions. Mark issues as favorites to find them easily later. Quality issue numbers are predefined, autogenerated and cannot be changed.

A quality action is a necessary activity required to mitigate a quality issue and prevent its further occurrences. Quality 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

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

You can copy all attachments and affected objects (on the Relationships tab) while using the Save As feature on quality issues and actions. All attributes visible on the screen are copied to the new quality object which, auto-relates to the old issue or action. You can select both the object type and the workflow during the Save As process. The status of the new issue or action is always Draft.
How do I know who has access to my quality issues or actions?

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.

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.

Working with Quality Issues: Explained

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

To create a quality issue:

1. Select Quality Issue from the Create menu.
2. Select the type of quality issue you are creating from the Type menu.
3. In the Name field, enter a name for the issue. In the Description field, briefly describe the problem.
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, you can add affected objects. Affected objects can include Inventory Inspections, Resource Inspections, WIP Inspections, Resources, Work Areas, Work Centers, Work Order Operations, Receipts, and Items.

Note: The current Quality Issues Relationships 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 are 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 infolet to analyze if you can resolve multiple, related issues together, and to avoid replicating any parallel efforts to resolve an issue. You can also identify trends in quality issues, which may be based on a broader problem and require more attention.

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 is **NOT** necessarily equal to the sum of Item Matches and Other Matches.

From the Actions list, create quality actions and change orders that link to the quality issue you are working on, and that defines how you intend to resolve the issue. The quality action has the same affected objects and attachments as the quality issue from which it’s created. The change order automatically includes a relationship link to the quality issue from which it’s created.

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

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.

### Creating and Routing a Quality Issue

**Video**

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

**Procedure**

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

To create and route a quality issue:

1. Use **Navigator** to go to the **Quality Management** work area.
2. Go to the Create menu and select ‘Quality Issue’ to create a quality issue. 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.
1. Search for and find the appropriate organization where the issue occurred.
2. Select values in the Severity and Source fields.
3. Click the Workflow infotile and select a workflow.

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.

Adding Attachments to a Quality Issue: Procedure

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

To add attachments to a quality issue:
1. Use Navigator and go to the Quality Management work area.
2. In the Overview page,
   a. Search for quality issues, if you have saved any.
   b. Click the Favorites and Recent Items icon to search for any favorite issues.
   c. 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.
5. Click Add Attachment.
6. From the Add Attachments pane, select an Attachment Type, say Files, and a Category from the lists.
7. Click Choose Files and select the required file.
8. Click Save. Notice that the Details infotile shows an additional attachment. You have options to download the attachment, delete it or view its contents in detail.
9. Select the attachment row, and click the Details icon.
10. To replace the file, click Choose Files. Select the required file and click OK.
11. Click Update.

Quality Issues and Inspection Results: How They Work Together

This topic describes how quality issues and inspection results impact each other in Quality Management.
A quality issue is automatically created for failures during 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.
Currently, a quality issue is created automatically for each failed quality inspection result.
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. It also enables better resource instance-specific reporting in OTBI or Genealogy > Roadmap items.

Working with Quality Actions: Explained

This topic describes how you can create and manage corrective and preventive quality actions.

A quality action is a necessary activity required to mitigate a quality issue and prevent its further occurrences. Quality 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

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

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

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

- **Details**: Use this information tile to view general information about the quality action. 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.

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

### Viewing Quality Issues and Quality Actions Graphically: Explained

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

The Graphical Navigator is a read-only 360-degree view of all the relationships on a quality issue and quality action. 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. In the dependency graph, when you hover over the visual card, the tooltip displays the name of the component. If the cursor is over the attribute of the component, then the tooltip displays the attribute.

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

### Relationships in Quality Events: Explained

Here 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.

Workflows in Quality Issue and Action Management: Explained

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

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

Workflow Templates

This topic discusses 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 Create 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
- Approval
- 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 UI. 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.

\[\text{Note:}\] 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 cannot 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:

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

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

Approvals and Notifications

Workflows help you route notifications to the approvers, and document their feedback. For quality objects, you cannot configure default approvers, but you can add approvers manually as you advance the object through its workflow. If you enable the Signature Password Required feature on issues and actions, ensure that you provide the user name and password during approval.
Configuring Action Links to Objects from Reports: Procedure

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.

To navigate from OTBI to a quality issue or action:

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 are 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=issueId=@{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 'Do not 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.
Quality Issues, Quality Actions, and Change Orders: How They Work Together

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

Quality Issues and Quality Actions

You can create and relate a new quality action from a quality issue. This copies affected objects, attachments, and some attributes to the new quality action. You can quickly open a quality action and resolve the issue. You can 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 does not appear at all and hence you cannot 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.

Creating a Change Order from a Quality Action

Video

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

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

To create a change order from a quality action:

1. Use Navigator to go 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 open the change order by clicking it.
4. Within the change order, click the Affected objects tab.
5. Click Add Item and search for the Item that needs to be changed.
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 lets you set them, based on the workflows. For example, if 'Closed' is not one of the next status set, you cannot go to the 'Closed' 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.

Creating a Quality Action from a Quality Issue

Video

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

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 cannot 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.

To create a quality action from a quality issue:

1. Use Navigator to go 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.

Security in Quality Management: Explained

Here we learn how security is supported in Oracle Quality Management Cloud. 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 cannot 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 area
- create a quality issue
- create a quality action.

The two types of privileges in Quality Management are:

- Manage - allows to create and edit issues and actions
- Review - provides a read-only view of the issues and actions.

Functional Security in Quality Management is based on the following privileges:

- Manage Quality Issue
- Review Quality Issue
- Manage Quality Action
- Review Quality Action

You can assign these privileges only to user roles, 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 are assigned
- the users, functions they can perform and the functionality and work areas they can access.

Oracle delivers some users, user roles and privileges which are ready to use. 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 is not 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 cannot be defined for the creation of issues and actions, as the data does not yet exist at this time. Hence, creation can only be allowed or prevented through Functional Security.

Data 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 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 cannot edit quality issues and actions if they are 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 issues and actions that they approve or have approved, will not 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. Users can only see issues which belong to the organization to which they are assigned. Assigning Inventory Organizations to users in the Functional Setup Manager through the Manage Data Access for Users step, gives them access to issues from these organizations.

Access to Affected and Related Objects

Items, Manufacturing Work Order Operations, Manufacturing Resources or Inspections can be added as affected objects to quality issues and actions. Oracle Innovation Management and Product Development objects like Ideas, Requirements and Change Orders can be related to the quality issue and quality action.

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

For example, to open and see the details of an affected item, you are not only required to have functional privileges to view and manage the item but you must also have data security grants to the inventory organization.
Application Composer in Quality Management: Overview

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

For example, you can 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.

These are the basic capabilities of user interface configuration with Application Composer:

- 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 is 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 are not initially visible to the user. Previously configured attributes become visible again when they are added to a layout.

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

You can configure the landing page, creation page and details page for quality issues and actions.

The following is a list of specific configurations that you can perform on quality actions and issues:

- Additional Attributes types: Date and Time; Long text; Fixed Choice List; Percentage; Dynamic Choice List
- Dynamic layouts

The Application Composer enhancements enable you to create actions, buttons and URL tabs on issues and actions. You can now 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 (as an administrator) to link and display objects as side tabs.
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 Oracle Innovation Management: Overview
9 Setting Up Quality Issues and Quality Actions

Security for Quality: Overview

Here we learn how security is supported in Oracle Quality Management Cloud. 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 cannot 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 - allows you to 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, 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 are 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 is not 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 cannot be defined for the creation of issues and actions, as the data does not 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 cannot edit quality issues and actions if they are 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 issues and actions that they approve or have approved, will not 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. Users can only see issues which belong to the organization to which they are 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

Items, Manufacturing Work Order Operations, Manufacturing Resources or Inspections can be added as affected objects to quality issues and actions. Oracle Innovation Management and Product Development objects like Ideas, Requirements and Change Orders can be related to the quality issue and action.

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

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

Roles and Privileges in Quality Issues and Action Management: Explained

This topic describes the setup and configuration of 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. 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.

<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>
</tr>
<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</td>
<td>For Product Management</td>
<td>For Product Management</td>
</tr>
<tr>
<td></td>
<td>• View Create Change Order Action Menu</td>
<td>• Manage Item Change Order</td>
</tr>
<tr>
<td></td>
<td>• View Item on Affected Object Search</td>
<td>• View Item Change Order.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Item Inquiry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage Item</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Review Receiving Receipt Summary.</td>
</tr>
</tbody>
</table>
### Roles | Functions | Privileges
---|---|---
Application Implementation Consultant | • View Item details Name, Description and other details for Items added on Affected Object. | • Review quality actions and quality issues types
 | • Create quality issue and quality action types | • Manage quality actions and quality issues
 | • Create and manage customers and inventory organizations. | • Perform functional setup-related activities in quality management.

You cannot 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.

### Providing 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 following are added from the Security Console:

**Privileges:**

- View Item Change Order
- Manage Item
- Review receiving receipt summary

**Duty Role:**

- Item Inquiry

**Data Security Policies:**

- EGP_SYSTEM_ITEMS_B
- EGO_ENGINEERING_CHANGES_B
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 cannot 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
- Creating Roles in the Security Console: Procedure

Quality Event Lookup Values: Explained

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

Lookup types with the configuration level System do not 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 are not used.

1. ORA_ENQ_ASSOCIATION_TYPE
2. ORA_ENQ_AFFECTED_OBJECT_TYPE

The following table details the lookups available in Quality Management.

<table>
<thead>
<tr>
<th>Module</th>
<th>Lookup Type</th>
<th>Lookup Code Meaning</th>
<th>Description</th>
<th>Configuration Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issues</td>
<td>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>
</tbody>
</table>
How do I update customer information in Quality Management Cloud?

You must have administrator rights to work with customer data. On the Oracle Cloud Applications Welcome page, 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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**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.