

# Agile Product Lifecycle Management for Process

Product Quality Scorecard User Guide

Release 5.2

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**ORACLE®**

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**February 15, 2008**

# DOCUMENT CONTROL

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# ABOUT THIS MANUAL

## Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes user guides, an administrator's guide, and release notes, all in Adobe® Acrobat™ PDF format. The Oracle Documentation Web site contains the latest versions of the Agile PLM for Process PDF files. You can view or download these manuals from the Web site, or you can ask your administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the Agile documentation (PDF) files. Visit the Oracle documentation Web site at:

<http://www.oracle.com/technology/documentation/index.html>

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**Note** The minimum software requirement for reading the PDF files is Adobe Reader™ version 6.0. You can download this free program from [www.adobe.com](http://www.adobe.com).

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If you need additional assistance or information, please contact [support@agile.com](mailto:support@agile.com) or phone (408) 284-3900 for assistance.

Before calling Agile Support about a problem with an Agile PLM manual, please have ready the full part number, which is located on the cover.
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## Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

## Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- ❑ Which applications your organization has purchased and installed
- ❑ Configuration settings that may turn features off or on
- ❑ Customization specific to your organization
- ❑ Security settings as they apply to the system and your user account

## Where to Find Information

Consult the table below to find specific information from the relevant Agile PLM for Process information source.

Table 1: Agile PLM for Process documentation topics, by source

Information type	PQS User Guide	PLM Admin. Guide	Readme file	Agile training	Agile Help Desk	Agile sales rep
<b>Administering Agile PLM for Process</b>		●		●		
<b>Cache management</b>		●				
<b>Core data management</b>		●				
<b>Custom data management</b>		●				
<b>Feature requests</b>					●	●
<b>Group management</b>		●				
<b>Installing Agile PLM for Process</b>				●		●
<b>Known issues</b>			●			
<b>Last-minute changes</b>			●			
<b>Reporting</b>	●					
<b>Resolved issues</b>			●			
<b>Samples</b>	●					
<b>Scorecards</b>	●					
<b>Sessions</b>	●					
<b>System-based roles</b>		●				
<b>System requirements</b>			●			
<b>Technical support</b>					●	
<b>User management</b>		●				
<b>Using the PQS application</b>	●			●		
<b>Workflow management</b>		●				

## Readme

Any last-minute information about Agile PLM for Process can be found in the Readme file on the Oracle Documentation Web site (<http://www.oracle.com/technology/documentation/index.html>).

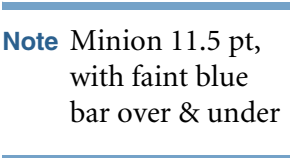
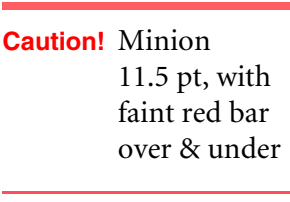
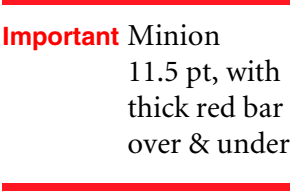
## Oracle Training

Agile offers end user, administrator, developer, and implementation training courses. For more information, contact your Agile project manager or sales representative.



## Document Conventions

The following formatting elements appear in Agile PLM for Process documentation.

Element	Meaning
<b>Helvetica Condensed, 9 pt. bold type</b>	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
9 pt. monospace font	Code samples
10 pt. monospace font	File names or directory names
<i>Blue italic font</i>	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
 <b>Note</b> Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
 <b>Caution!</b> Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
 <b>Important</b> Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.



## Introduction to Product Quality Scorecard

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*This chapter provides an overview of the Agile Product Lifecycle for Process PQS application. Topics in this chapter include:*

- ❑ *Overview*
  - ❑ *Getting Started with PQS*
- 

### **Overview**

Product Quality Scorecard (PQS) provides your company with a tool for:

- ❑ Quality session management to organize and manage evaluation sessions
- ❑ Quality scorecarding based on scorecards defined in the Global Specification Management application
- ❑ Sample management with the ability to track supply source

## Touch Points with Other Agile Applications

The PQS application interfaces with several other Agile Product Lifecycle for Process applications.

### **Global Specification Management**

Global Specification Management (GSM) serves as a tool to create and modify your products, including finished products and manufacturing processes. You can syndicate this core data to other Agile Product Lifecycle for Process applications as well as to other systems in your company. PQS uses testing protocols, which must be configured in GSM.

### **Supply Chain Relationship Management**

Supply Chain Relationship Management (SCRM) provides a collaborative business process for managing supply chain relationships and sourcing approvals across product suppliers, distributors, and all other supply chain participants. You can use SCRM to build a view of the relationships between participants in a supply chain. Agile Product Lifecycle Management for Process can leverage the information that you provide in other applications such as GSM and SCRM.

When you use PQS to create a sample or testing session, you can assign profiles of sourcing and receiving facilities created using SCRM.

### **Reporting**

PQS uses the Agile Product Lifecycle for Process Reporting application (RPT) framework for creating custom reports.

## Getting Started with PQS

### Accessing PQS

To access the PQS application, select **PQS** from the left navigation panel as shown in figure 1-1 below or select **PQS** from the Applications menu of the top menu bar, as shown in figure 1-2.

Figure 1-1: The PQS menu from the left navigation panel

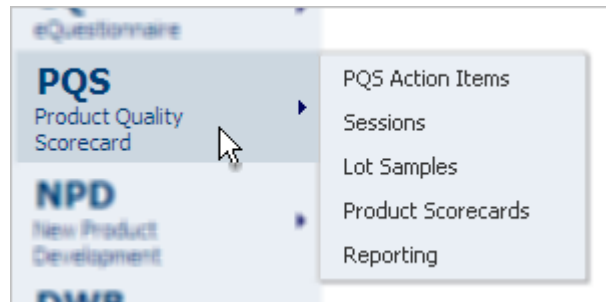
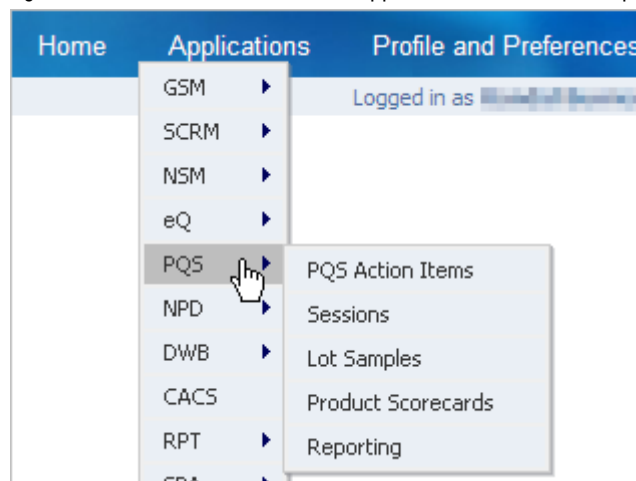


Figure 1-2: The PQS menu from the Applications menu on the top menu bar



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



# Using Product Quality Scorecard

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*This chapter presents basic information about using the Product Quality Scorecard application.*

*Topics in this chapter include:*

- ❑ *Creating Samples*
  - ❑ *Defining Sessions*
  - ❑ *Testing Samples*
  - ❑ *Using Scorecards*
  - ❑ *Testing Protocols*
  - ❑ *Reporting in PQS*
- 

## Overview

Product Quality Scorecard (PQS) can help you to track and manage product nonconformance, to remediate the root cause, to prevent nonconformance, and to continuously improve quality. Using the flexible, user-defined PQS scorecard architecture, you can specify criteria to use in evaluating incoming raw material or finished goods. Use PQS to monitor quality at any phase of the product lifecycle.

Users with the following business functions use PQS:

- ❑ **Quality administrators** can create quality sessions and product samples. They monitor PQS sessions, assign product samples and testers to PQS sessions, and can also run reports.
- ❑ **Evaluators** can test PQS samples and score them according to the assigned protocol.
- ❑ **Management** can run reports to analyze quality data.

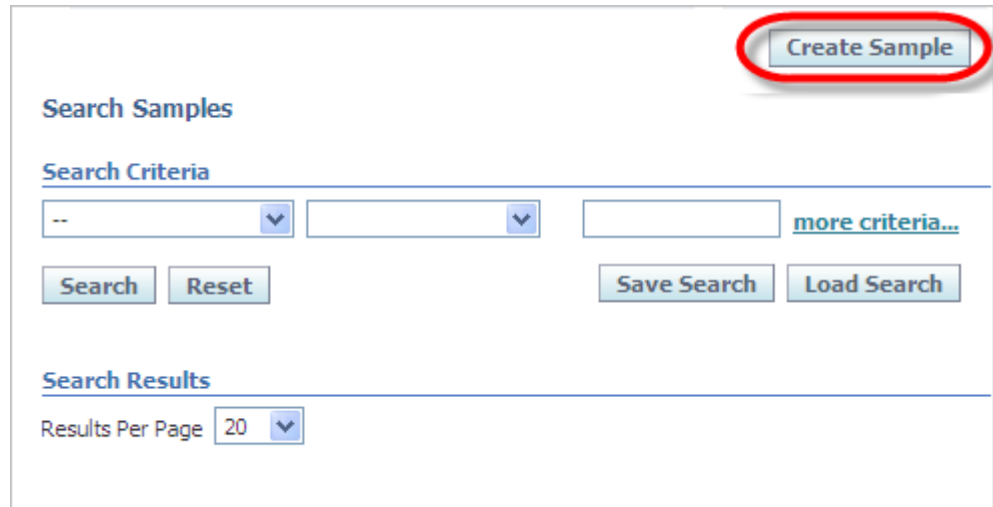
## Creating Samples

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

### To create a new sample:

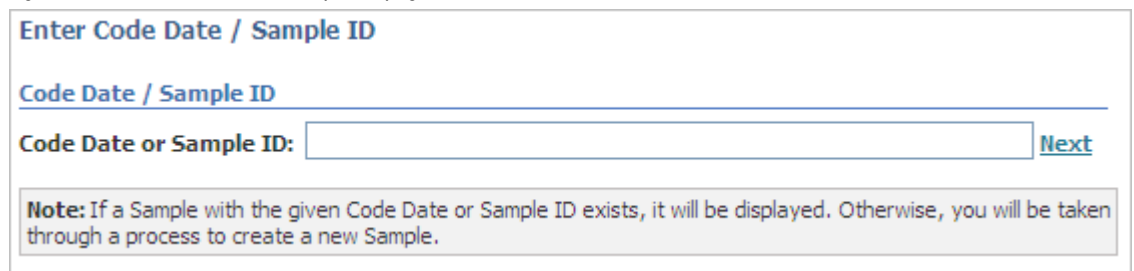
- 1 Select **PQS > Lot Samples** from the left navigation panel. The Search Samples page displays, as figure 2-1 shows below:

Figure 2-1: Search Samples page



- 2 Click **Create Sample** at the top right corner of the page (as shown in figure 2-1 above). PQS displays the Enter Code Date /Sample ID page, as figure 2-2 shows below.

Figure 2-2: Enter Code Date/Sample ID page



- 3 Type the name of the sample to create in the **Code Date or Sample ID** field.



- 4 Click **Next** or press **Enter**. If sample with the name that you typed already exists, PQS displays it in a table, as shown in figure 2-3 below:

Figure 2-3: Existing samples matching the name entered

**Enter Code Date / Sample ID**

**Code Date / Sample ID**

**Code Date or Sample ID:**  [Next](#)

**Note:** If a Sample with the given Code Date or Sample ID exists, it will be displayed. Otherwise, you will be taken through a process to create a new Sample.

Sample #	Product/Specification	Storage Location	Status
0000309	Spice Oil for Pork & Beans	Beverage-Air - Brussels	---

- 5 If a sample with that name does not exist, the Select Specification page displays, as shown in figure 2-4. Use this page to create a sample using the following sections:
- Code Date
  - Specification section—Associate the sample with a specification in GSM
  - Source Facility section—Associate the sample with a sourcing facility
  - Receiving Facility section—Associate the sample with a receiving facility

Figure 2-4: Select Specification page

**Select Specification**

**Code Date**

**Code Date:** 0000309

**Specification**

**Cross Reference:** USBPCS  [Find](#)

**Specification:**

**Source Facility**

**Cross Reference:** USBPCS  [Find](#)



**Source Facility:**

**Receiving Facility**

**Cross Reference:** USBPCS  [Find](#)

**Receiving Facility:**


**Source Facility and Receiving Facilities are not mandatory and can be added to the sample later.**

**6** In the Specification section, search for a particular specification. The field to the left of the Find link in this section is a required field. You can search in any of the following ways:

- Click the **Specification** link and select a specification using the specification search page.
- Search for a specification by cross-reference. Select a system ID from the Cross Reference drop-down list, enter an equivalent number for the specification, and click the **Find** link.
- Enter Source and receiving facilities entered in the same manner. If sourcing approvals exist for the specification that you have chosen, PQS populates possible source and receiving facilities for you.

If found, the specification that you selected will display in the Specification field.

**7** Click the next page icon (  ). The Sample Summary page displays. This page consists of the following sections:

- Summary Information
- Sample
- Attachments

---

**Note** In the Summary Information section you can define the sourcing and receiving facility by clicking the field label and selecting facilities from the Facility Search page.

---

## Sample Section

The Sample section, shown in figure 2-5 below, displays general information about the sample.

Figure 2-5: Sample section

**Sample**

Sample #: 0001256

Sample Type: Incoming Material

Location: [Redacted] ✖

Internal Alias:

Code Date: 0000309 GTIN/UPC/EAN:

Manufacture Date: [Redacted] ✖ Use-Through Date: [Redacted] ✖

Log/Receiving#:  Waybill/Invoice#:

Quantity:  Cases ▼ Temperature:  C ▼

Receiving Condition:

Notes:

Date Received: [Redacted] ✖ Scheduled Evaluation: [Redacted] ✖

Key fields include:

**Sample #**—A system-created unique identifier. This field cannot be changed.

**Sample Type**—A business-defined selection field. The system administrator defines this field.

**Location**—Use this field to search the SCRM facilities to identify where to use this sample.

**Manufacture Date**—Date on which the sample was manufactured.

**Use-Through Date**—Expiration date of the sample (required).

**Date Received**—Date on which the sample was received.

**Scheduled Evaluation**—Date on which the sample is expected to be tested.

## Attachments Section

Use the Attachments Section to attach any documents that are related to the sample to be tested.

### To add an attachment:

- 1 If the Sample Summary page is not already in edit mode, click **Edit** at the upper right of the page. PQS reloads the page in editable form.
- 2 Under the Attachments section, click **Add New**. The Attachments/Comments dialog box opens.
- 3 Click **Browse** to navigate to and select one or more local files to upload.
- 4 Click **Upload**.

- 5 If you like, enter any comments in the **Comments** field.
- 6 Click **Done** at the top right of the dialog box. Figure 2-6 shows the Add New button. Figure 2-7 shows the Attachments/Comments dialog box.

Figure 2-6: Attachments section

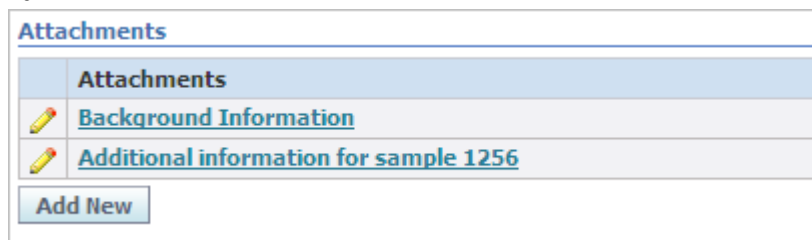
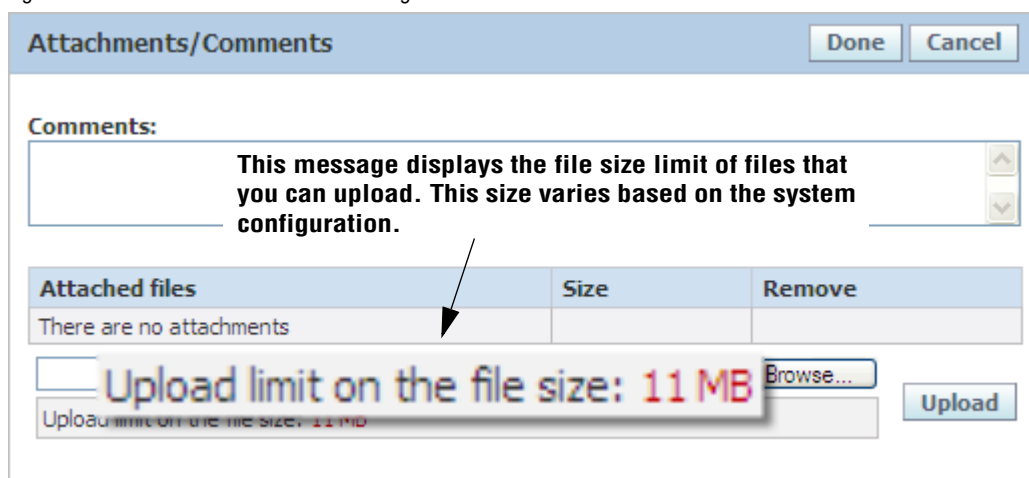


Figure 2-7: Attachments/Comments dialog box



- 7 Once you have entered all the information, click **Save & Close** to save the sample details. You can then create a session for testing the sample.

## Defining Sessions

PQS sessions establish the following:

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

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

### To create a session:

- 1 Click **Sessions** from the left navigation panel. PQS displays the Search Sessions page. For more information on searching for an existing session, see [Searching for a Session](#) on page 2-10.
- 2 Click **Create Session**. The Session Information page displays, as figure 2-8 shows below.

---

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

---

Figure 2-8: Session Information page

### Session Information

**Session #:** 0000254

**Session Name:**

**Status:**  ▼

**Location:**

**Evaluation Date:**

**Session Leader:**







**Notes:**

**Testing Protocol:**

**Scorecard Type:**  ▼

**Users:**

**Samples:**

Sample #	Product Name	Code Date	Internal Alias	Supplier	
 0000888	PQS Ingredient Spec 20060825 0933	20070514 1157		DEF Europe	↓
 0000915	Vinegar - Distilled - White - 100 Grain	Sample 1		ABC Facility	↑↓
 0000923	Prodika Fries	Curly Fries Sample		ABC Facility	↑↓
 0000968	PQS Ingredient Spec 20060825 0933	v501 smoke test 20070604 1044	123	DEF Europe	↑↓
 0000974	v500Release7smoketest CACS Lemonade	v501rc2 ordering		DEF Europe	↑↓
 0000977	PQS Ingredient Spec 20060825 0933	v501rc2 2007060 0943	xyz	DEF Europe	↑

### 3 Enter information in the applicable key fields.

**Session #**—A system-created unique identifier. This field cannot be changed.

**Session Name**—A free-text field (required).

**Status**—Select “Pending” or “Complete” from the drop-down list. Pending sessions show up in the Action Items list; completed session do not.

**Location**—Facility where the testing session will take place (required). Click the field link to use the Facility Search page to select a facility.

**Evaluation Date**—Date on which the session will take place. Click the field link to use the Calendar dialog box to select a date.

**Session Leader**—By default, the value of this field is the creator of the session in PQS. A session leader can be any other user as well. Click the field link to use a search page to select a user.

**Testing Protocol**—Defines the scorecard to use (scorecards are created based on testing protocols in GSM). This field is required.

Click the field link to use a search page to select a protocol.

**Scorecard Type**—Defines the layout of the scorecard. Select a type from the drop-down list.

**Users**—A list of testers for this session. Click the field link to use a search page to select users.

**Samples**—A list of samples to test in this session. Click the field link to use a search page to select samples.

- 4 Once you have entered all the information, click **Save & Close** to save the session. Each user defined as a tester (in the Users field) will receive an action item for the session in his or her Action Items list. Inside that session action item, a separate sub-action is created for each sample that is in the session.

## Working with Action Items

View action items assigned to you by selecting **PQS Action Items** from the left navigation panel. Figure 2-9 shows the Action Items page.

Figure 2-9: Action Items page

Session Participant			
Session #	Session Name	Evaluation Date	Location
<a href="#">0000046</a>	Salted Cod	31-Oct-2006	---
<a href="#">0000081</a>	Beef Tips with Sauce	19-Dec-2006	Angus Facility
<a href="#">0000082</a>	Beef Noodle Soup (Taiwan)	19-Dec-2006	Asia Vendor Facility
<a href="#">0000096</a>	-----	02-Feb-2007	Europe Quality Center
<a href="#">0000106</a>		b-2007	ABC Facility
<a href="#">0000149</a>	Hot Sake	25-Apr-2007	Beverage-Air - Japan
<a href="#">0000161</a>	Veggie Burger - Session 1	07-May-2007	Beverage-Air - Atlanta
<a href="#">0000254</a>	Chicken Strips - Low Sodium	07-Sep-2007	ABC - Dallas

Click a field to view the samples and scorecard status.

This page lists all the pending sessions for which you are associated as a user. Clicking the session number displays the samples and the status of scorecards. As mentioned earlier, you will see one scorecard for each sample in the session. Once a session is complete, scorecards related to that session cannot be accessed from the action items.

## Searching for a Session

Use the Search Sessions page to search for a session in the same way that you perform other searches in Agile Product Lifecycle for Process. The page consists of two tabs: Search and Pending Sessions.

### Pending Sessions Tab

As shown in figure 2-10, the Pending Sessions tab consists of two lists of sessions:

**Session Leader**—Includes all sessions for which you are the session leader.

**Session Participant**—Includes all sessions for which you are a participant (tester).

Click the hyperlinked session number in the **Session #** column to open the session.

Figure 2-10: Pending Sessions tab

**Create Session**

**Search Sessions**

**Search** **Pending Sessions**

Session Leader			
Session #	Session Name	Evaluation Date	Location
<a href="#">0000254</a>	Chicken Strips - Low Sodium	07-Sep-2007	ABC - Dallas
<a href="#">0000161</a>	Veggie Burger - Session 1	07-May-2007	Beverage-Air - Atlanta
<a href="#">0000160</a>	Special Fries	04-May-2007	ABC Facility
<a href="#">0000148</a>	Test Session 5	25-Apr-2007	ABC Facility
<a href="#">0000111</a>	Beef tips - III	26-Feb-2007	ABC Facility

Session Participant			
Session #	Session Name	Evaluation Date	Location
<a href="#">0000046</a>	Test Session	31-Oct-2006	---
<a href="#">0000081</a>	Beef tips - III	19-Dec-2006	Angus Facility



## Testing Samples

You can navigate to sample scorecards that you need by:

- Selecting a session from the Action Items page
- Searching for and then selecting a sample using the Lot Samples search page (see [Using the Lot Samples Page](#) on page 2-13)

### Using Action Items

If you are assigned as a tester for a particular session, your Action Items list includes an item to create a scorecard for each sample in the session. On the Action Items page, click the hyperlinked number in the **Session #** column. PQS displays the Session Scorecard(s) page.

For each sample, click the **View Scorecard** link in the Scorecard column to view an existing scorecard or the **Create Scorecard** link to create a new scorecard. The Scorecard Observation dialog box opens.

You can partially complete a scorecard and then save it for later completion. Figure 2-11 shows the Session Scorecard(s) page:

Figure 2-11: Session Scorecard(s) page

Session Scorecard(s)		
Chicken Strips - Low Sodium -- 07-Sep-2007 -- ABC - Dallas		
Sample	Scorecard	Status
Chicken Strips - Low Sodium - #23	<a href="#">View Scorecard</a>	In Progress
Chicken Strips - Low Sodium - #345	<a href="#">View Scorecard</a>	In Progress
Chicken Strips - Low Sodium - #2000	<a href="#">Create Scorecard</a>	---
Chicken Strips - High Sodium - #0001	<a href="#">Create Scorecard</a>	---

When you click the **View Scorecard** or **Create Scorecard** link, the Scorecard Observation page displays the scorecard, as shown in figure 2-12 below. The contents of this page can vary, depending on which testing protocol and which scorecard was selected for the session.

Figure 2-12: Scorecard Observation page

**Scorecard Observation**
Save
Save & Close
Complete
Cancel

**Chicken Strips - Low Sodium --- #3454 - Score: 3**

[Show additional attributes...](#)

**Qualification:** Certified Evaluation
**Panelist Name:** Joe Foodman

---

**Temperature**

This is the first section

Criteria	Score	Comments	%
Cooling - After Processing - Internal Temperature	<input checked="" type="radio"/> 20 degrees	<input type="checkbox"/> 1. cold <input type="checkbox"/> 3. cool	6
	<input type="radio"/> 30 degrees	<input checked="" type="checkbox"/> 4. moist <input type="checkbox"/> 6. warm	

---

**Color**

This is the second section

Criteria	Score	Comments	%
Color	<input type="radio"/> white <input type="radio"/> pale pink <input type="radio"/> pink <input type="radio"/> red <input type="radio"/> brown		0

---

**Texture**

This is the third section

Criteria	Score	Comments	%
Texture	<input type="radio"/> Smooth as glass <input type="radio"/> Slightly rough <input checked="" type="radio"/> Sand paper		0
Texture	<input checked="" type="radio"/> Smooth as a bowling ball <input type="radio"/> More like a well used bowling ball <input type="radio"/> Wrecking Ball		6
<b>Texture - Score :</b>			<b>3</b>

**Chicken Strips - Low Sodium --- #3454 - Score: 3**

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## Using the Lot Samples Page

You can also test a sample by clicking **Lot Samples** in the left navigation pane and using the Search Samples page to select the sample to test. Figure 2-13 shows the Search Samples page with returned results.

Figure 2-13: Search Samples page with returned samples

[Create Sample](#)

### Search Samples

**Search Criteria**

Spec Name

Contains

White

[more criteria...](#)

[Search](#)
[Reset](#)

[Save Search](#)
[Load Search](#)

**Search Results**

Results Per Page

10

[Export](#)

Sample #	Code Date	Specification	Source Facility	Date Received	Scheduled Evaluation	Manufacture Date	Use-Through Date
<a href="#">0000247</a>	VINDW 011107	Vinegar - Distilled - White - 100 Grain (5077413)	The Food Manufacturing Co	14-May-2007	15-May-2007	07-May-2007	22-May-2007
<a href="#">0000257</a>	VINDW 013107	Vinegar - Distilled -	The Food acturing Co				
<a href="#">0000282</a>	VINDW 020507	White - 100 Grain (5077413)	. Facility				
<a href="#">0000459</a>	BPWN 040407	Beans - Peas - White (Navy) - Dry (5077418)	Foods 'R' Us				

Refer to [Searching for a Session](#) on page 2-10 for more information on searching.

Click the hyperlinked number in the **Sample #** column to open the sample.

**Note** Typically, if one sample is being tested by one person, there is no need to create a session. Instead, navigate directly to the sample and score the sample there.

Figure 2-14 shows the Sample Summary page of the selected sample.




Figure 2-14: Sample Summary for selected sample

[Edit](#)

### Sample Summary

---

#### Summary Information

**Specification :** Vinegar - Distilled - White - 100 Grain (5077413-001)   
**Source Facility :** The Food Manufacturing Co (USA)   
**Receiving Facility :** The Food Manufacturing Co (USA)   
**Originator:** Jones, Sally      **Created:** 25-Aug-2006

---

#### Sample

**Sample #:** 0000247  
**Sample Type:** Incoming Material  
**Location :**  
**Internal Alias:**  
**Code Date:** 8675309      **GTIN/UPC/EAN:**  
**Manufacture Date :**      **Use-Through Date :**  
**Log/Receiving#:**      **Waybill/Invoice#:**  
**Quantity:** Cases      **Temperature:** C  
**Receiving Condition:**  
**Notes:**  
**Date Received :**      **Scheduled Evaluation :**

---


#### Attachments

**Attachments**

There are no attachments

---

#### Scorecards

Scorecard	By	Qualification	Score	Date	Status	Delete
<a href="#">5000915 - rqs global tp 20060522</a>	Jo Smith	---	0.00	19-Oct-2007	In Progress	




[Add New](#)

To create a new scorecard for the sample, click **Add New** under the Scorecards section. PQS displays the Scorecard Summary page, as shown in figure 2-15 below.

Figure 2-15: Scorecard Summary page

**Scorecard Summary** Save Save & Close Complete

**Summary Information**

**Specification :** Vinegar - Distilled - White - 100 Grain (5077413-001)   
**Source Facility :** The Food Manufacturing Co (USA)   
**Receiving Facility :** The Food Manufacturing Co (USA)   
**Originator:** Smith, Jane      **Created:** 25-Aug-2006









**Sample**

**Sample #:** 0000247  
**Sample Type:** Incoming Material  
**Location :**  
**Internal Alias:**  
**Code Date:** 8675309  
**Manufacture Date :**  
**Log/Receiving#:**  
**Quantity:** Cases  
**Receiving Condition:**  
**Notes:**  
**Date Received :**  
**GTIN/UPC/EAN:**  
**Use-Through Date :**  
**Waybill/Invoice#:**  
**Temperature:** C  
**Scheduled Evaluation :**

**Attachments**

**Attachments**  
There are no attachments

**Scorecard Information**

**Scorecard #:** 5000924  
**Testing Protocol:** New Test second row   
**Scoring Location:**   
**Scored By:**  **Scorecard Type:** Product Quality - Advanced   
**Qualification:**  **Panelist Name:**   
**Date of Scoring:** 20-Nov-2007  
**Special Notes:**   


The Scorecard Summary page consists of the following sections:

- Summary Information
- Sample
- Attachments
- Scorecard Information

## Summary Information Section

As shown in figure 2-16 below, the Summary Information section displays the core information about the session:

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

Figure 2-16: Summary Information section

Summary Information	
<b>Specification :</b>	Vinegar - Distilled - White - 100 Grain (5077413-001) 
<b>Source Facility :</b>	The Food Manufacturing Co (USA) 
<b>Receiving Facility :</b>	The Food Manufacturing Co (USA) 
<b>Originator:</b>	Smith, Jane
<b>Created:</b>	25-Aug-2006

## Sample Section

As shown in figure 2-17 below, the Sample section displays information about the sample in the following fields: Sample #, Sample Type, Location, Manufacture Date, Date Received, and several other fields that describe the sample.

Figure 2-17: Sample section

Sample	
<b>Sample #:</b>	0000247
<b>Sample Type:</b>	Incoming Material
<b>Location :</b>	
<b>Internal Alias:</b>	
<b>Code Date:</b>	8675309
<b>Manufacture Date :</b>	
<b>Log/Receiving#:</b>	
<b>Quantity:</b>	Cases
<b>Receiving Condition:</b>	
<b>Notes:</b>	
<b>Date Received :</b>	
<b>GTIN/UPC/EAN:</b>	
<b>Use-Through Date :</b>	
<b>Waybill/Invoice#:</b>	
<b>Temperature:</b>	C
<b>Scheduled Evaluation :</b>	

## Attachments Section

The Attachments section, shown in figure 2-18 below, lists all the attachments related to the sample.

Figure 2-18: Attachments section

Attachments	
	<a href="#">Background Information</a>
	<a href="#">Additional information for sample 1256</a>

[Add New](#)

## Scorecard Information Section

The Scorecard Information section, shown in figure 2-19 below, displays default information about how the sample will be tested.

Figure 2-19: Scorecard Information section

Scorecard Information	
<b>Scorecard #:</b>	5000924
<b>Testing Protocol:</b>	Blind taste test IV-a
<b>Scoring Location:</b>	California Cookie Co.
<b>Scored By:</b>	Smith, Dilbert
<b>Scorecard Type:</b>	Product Quality - Advanced
<b>Qualification:</b>	Training
<b>Panelist Name:</b>	
<b>Date of Scoring:</b>	20-Nov-2007
<b>Special Notes:</b>	<div></div>

Key fields include:

**Scorecard #**—A system-created unique identifier. This field cannot be changed.

**Testing protocol**—Prepopulated with the default value if a testing protocol is defined for that specification in GSM. You can select another testing protocol by clicking the **Testing Protocol** link.

**Scored By**—Click the **Scored By** link and select the person testing the sample (required).

**Scorecard Type**—Select a scorecard type from the drop-down list.

**Qualification**—Select a qualification from the drop-down list. This list is defined by a system administrator.

**Panelist Name**—The name of the panelist who will complete the scorecard.

**Date of Scoring**—Defaults to today's date. Click the hyperlinked **Date of Scoring** field label to change it.

When you click the next page icon ( ), PQS displays a new scorecard.

## Using Scorecards

The PQS scorecard defines how tests are displayed to the tester. The two types of scorecards available are:

- Sensory - Blind
- Blind Sensory - 9 point scale

### **Sensory - Blind Scorecard**

This scorecard displays the basic information about the sample but does not tell the tester any details about the supplying company or the specification name.

PQS administrators are able to see product and supplier details on this type of scorecard.

### **Blind Sensory - 9 point scale**

This scorecard is designed to handle up to a 9-point rating continuum and has a different layout from the Sensory - Blind format. It also does not relate information about the specification or the supplier.

PQS administrators are able to see product and supplier details on this type of scorecard.

## Testing Protocols

A testing protocol defines which tests will be displayed on a scorecard. You can define testing protocols in Global Specification Management. Use them to create scorecards in the PQS application. For details on testing protocols, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

## Reporting in PQS

You can develop custom reports against the data gathered in the Product Quality Scorecard application. If a custom report has been developed, you can access it from PQS if you have the Reporting application installed in your environment. Some examples of custom reports are:

- Benchmark reports
- Comparison reports to compare quality of samples from different suppliers or over a period of time
- Supplier performance reports
- Product quality reports

For more information on reporting, please see the *Agile Product Lifecycle Management for Process Reporting User Guide*.