

## **Agile Product Lifecycle Management for Process**

eQuestionnaire User Guide

Release 5.2

**Part No. E11010-01**

February 2008

**ORACLE®**

## Copyrights and Trademarks

Copyright © 1995, 2008, Oracle Corporation and/or its affiliates. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

### U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

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

Java and Solaris are trademarks or registered trademarks of Sun Microsystems, Inc. in the U.S. or other countries.

Microsoft, Windows, Excel, and Microsoft Internet Explorer are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries.

**February 15, 2008**

# DOCUMENT CONTROL

---

## Change Record

Date	Author	Version	Change Reference
Sept-07	Agile/Oracle	1.0	Initial release, Part No. TPPR-0045-5.1A
Feb-08	Oracle	2.0	2nd release, Part No. E11010-01



# CONTENTS

## About This Manual

Agile Product Lifecycle Management for Process Documentation .....	vii
Audience .....	vii
Variability of Installations .....	vii
Where to Find Information .....	viii
Readme .....	viii
Agile Training .....	viii
Document Conventions .....	ix

## Chapter 1 Introducing eQuestionnaire

The eQuestionnaire Application .....	1-1
Getting Started with eQuestionnaire .....	1-2
Accessing eQuestionnaire .....	1-2

## Chapter 2 Working with Questionnaires

Action Items .....	2-1
Viewing a Questionnaire .....	2-1
Action Items Table .....	2-2
Creating a Questionnaire .....	2-3
Selecting a Questionnaire Type .....	2-3
Importing a Specification .....	2-6
Defining Access to the Questionnaire .....	2-6
Header Section .....	2-6
Contact Information Section .....	2-7
Edit Questionnaire Section .....	2-7
Saving a Questionnaire .....	2-10
Sending Questionnaire to Supplier .....	2-10
Creating a Copy of a Questionnaire .....	2-10
Receiving a Questionnaire - Supplier .....	2-11
Logging in to Supplier Portal .....	2-11
Completing Questionnaire .....	2-11
Saving a Questionnaire .....	2-11
Returning a Questionnaire .....	2-11
Processing a Completed Questionnaire .....	2-12
Reviewing a Questionnaire .....	2-12
Changing Ownership and Access Rights .....	2-12
Exporting a Questionnaire to GSM .....	2-12
Selecting an Import Target .....	2-12
Exporting Data to GSM .....	2-13
Returning a Questionnaire to a Supplier .....	2-15
Searching for Questionnaires .....	2-15



# 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>

---

**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).

---

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.
---

## 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	eQ User Guide	Admin. User 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>Creating questionnaires</b>	●			●		
<b>Custom data management</b>		●				
<b>Feature requests</b>					●	●
<b>Installing Agile PLM for Process</b>				●		●
<b>Known issues</b>			●			
<b>Integrating questionnaires into GSM</b>	●					
<b>Last-minute changes</b>			●			
<b>New in this release</b>			●	●		●
<b>Receiving questionnaires</b>	●					
<b>Resolved issues</b>			●			
<b>System-based roles</b>		●				
<b>Returning questionnaires</b>	●					
<b>System requirements</b>			●			
<b>Technical support</b>					●	
<b>Using the eQ application</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>).

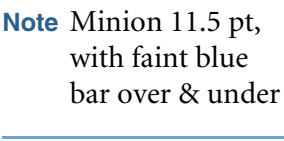
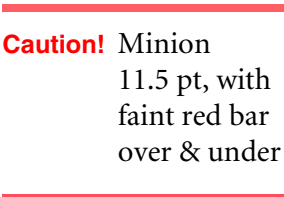
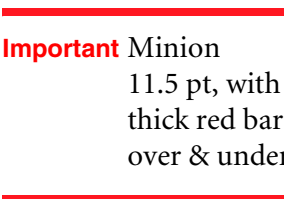
## Agile Training

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 are used 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.



## Introducing eQuestionnaire

---

*This document provides an overview of Agile Product Lifecycle Management for Process eQuestionnaire and includes the following topics:*

- ❑ *The eQuestionnaire Application*
  - ❑ *Getting Started with eQuestionnaire*
- 

### **The eQuestionnaire Application**

The eQuestionnaire extension to Global Specification Management (GSM) provides the capability to electronically solicit, review, enrich, and leverage specification data from suppliers. You can create a questionnaire by importing data from an existing GSM specification or you can start with a blank one.

Once you have created the questionnaire, you can send it to a supplier. Agile Product Lifecycle Management for Process sends the supplier an email message containing a link to the questionnaire. The supplier can then access the questionnaire, supply the requested data, and submit the requested data to you.

You can then review the returned questionnaire and selectively push data into a new or existing GSM specification or return it to the supplier to solicit more information.

Agile Product Lifecycle Management for Process saves every questionnaire; you can always retrieve one if needed, for auditing purposes.

## Getting Started with eQuestionnaire

### Accessing eQuestionnaire

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

Figure 1-1: Selecting eQ from the application navigation

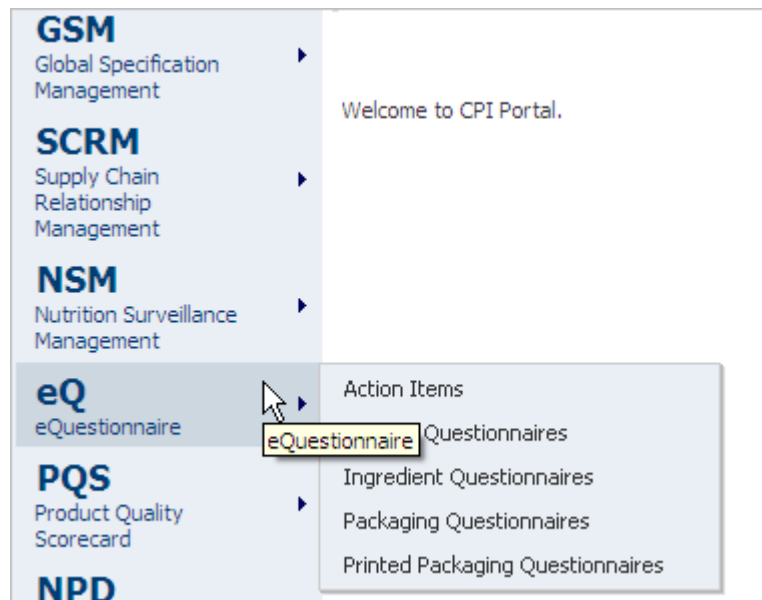
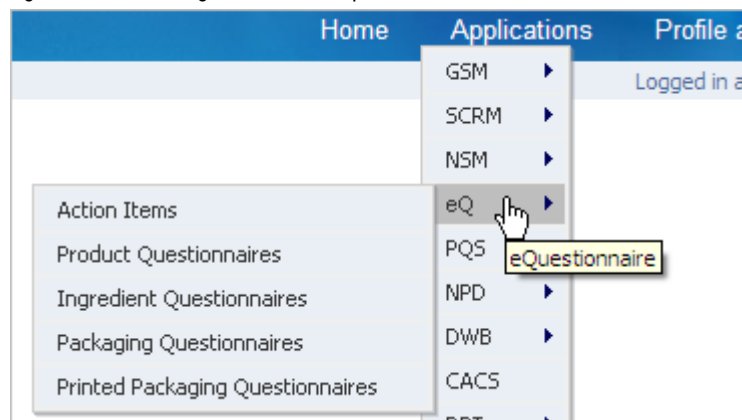


Figure 1-2: Selecting eQ from the top menu bar



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

## CHAPTER 2

# Working with Questionnaires

*This chapter describes how to use eQuestionnaire to solicit and integrate data provided by suppliers. Topics in this chapter include:*

- ❑ *Action Items*
- ❑ *Creating a Questionnaire*
- ❑ *Receiving a Questionnaire - Supplier*
- ❑ *Processing a Completed Questionnaire*

## Action Items

When you select **Action Items** from the top menu bar or left navigation panel, eQ displays the Action Items page. This page contains a list of questionnaires that identify you as the primary owner and require your action—think of this page as your “to do” list. This list does not include questionnaires that have already been imported into the Global Specification Management (GSM) application.

## Viewing a Questionnaire

You can view any questionnaire by clicking the linked number in the **Questionnaire #** column.




Figure 2-1: Hyperlinked specification numbers in the Questionnaire # column



eQ Action Items			
Questionnaire #	Title	Company Name	Email Address
<a href="#">5012002</a>	Product Spec	A Groceries Co., Ltd.	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>
<a href="#">5012368</a>	Beans - Peas - White (Navy) - Dry	Consolidated Calories, Inc.	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>
<a href="#">5012741</a>	CACS Lemon Flavor	Citrus 'R' Us	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>
<a href="#">5013396</a>	Concentrated Orange Juice (DWB)	Citrus 'R' Us	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>
<a href="#">5013707</a>	Daisy Land Apples	ABC Company	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>
<a href="#">5013716</a>	Parmesan Cheese	ABC Company	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>
<a href="#">5013717</a>	Cheese Slice	ABC Company	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>
<a href="#">5013765</a>	Chili Powder	The Food Company	<a href="mailto:juliana@gnatika.com">juliana@gnatika.com</a>

## Action Items Table

To sort rows by column, click any hyperlinked column head, as shown in Figure 2-2, *Action Items page*, on page 2-2.

The Status column displays a green on schedule () , amber warning () or red late () symbol based on the dates that you specified in the Due Date and Amber Date fields when creating the questionnaire. The value of the Amber Date field is a number of days.

For example, if the value of the Amber Date field is **3** and the value of Due Date is **August 18**, then the following will be true:















- On August 14 or before, the symbol will be: 
- On August 15, 16, and 17, the symbol will be: 
- On August 18 or later, the symbol will be: 

Figure 2-2: Action Items page

[Create New eQuestionnaire](#)

**eQuestionnaire** Sort the list by clicking a column head

Questionnaire #	Title	Company Name	Email Address	Date Sent	Due Date	Imported Into GSM	Date Received	Status
<a href="#">5013707</a>	Daisy Land Apples	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/17/2007	No	8/13/2007	
<a href="#">5013720</a>	Tasty Ingredient eQ - blank # 1	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/27/2007			
<a href="#">5013341</a>	v501 pkg from eQ TMC 20070606	ABC Company	<a href="#">lshah@prodline.co</a>	6/13/2007	6/14/2007	No		
<a href="#">5013719</a>	Cheese Slice	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/24/2007	No		
<a href="#">5013721</a>	Tasty eQ - Product spec # 1 - blank	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/29/2007	No		
<a href="#">5013723</a>	Tasty eQ - Product spec # 2 - blank	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/27/2007	No		
<a href="#">5013724</a>	Tasty eQ - Product spec # 2 - blank	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/27/2007	No		
<a href="#">5013716</a>	Parmesan Cheese	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/17/2007	No		
<a href="#">5013717</a>	Cheese Slice	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/24/2007	No		
<a href="#">5013718</a>	Parmesan Cheese	ABC Company	<a href="#">lshah@prodline.co</a>	8/13/2007	8/17/2007	No		
<a href="#">5013160</a>	Crunchy Frog Legs	A Booming Manufacturing Co	<a href="#">lshah@prodline.co</a>	5/7/2007	5/8/2007	No		

The status of the questionnaire

Each row in the eQ Action Items table gives more information about the questionnaire, as explained in table 2-1 below:

Table 2-1: Key eQ Action Items fields

Field	Definition
<b>Questionnaire #</b>	The number assigned to the questionnaire by the system. You can click the field link to view the questionnaire.
<b>Due Date</b>	The date on which the questionnaire must be returned from the supplier.
<b>Imported into GSM</b>	‘No’ indicates that the questionnaire has not been imported into the GSM application. This field is automatically updated by the system and cannot be changed.  Once a questionnaire is integrated into GSM, it will not appear in this list.
<b>Date Received</b>	The date that the questionnaire was received from the supplier.
<b>Status</b>	This field displays a red, amber, or green status bar symbol indicating whether the due date was met. It is based on the current date, Due Date, and Amber Date:  Red—The Due Date has passed (Current Date has passed the Due Date).  Amber—The Due Date is approaching (Current Date plus the Amber Date is greater than or equal to the Due Date).  Green—Displays when the questionnaire was returned in the allotted time (Due Date met) or if the Due Date is still some days away (the current date plus the Amber Date is less than the Due Date).

## Creating a Questionnaire

If you have the necessary user privileges, you can create a questionnaire by clicking **Create New eQuestionnaire** at the top right corner of any default page in the five main eQ sections (Action Items, Product Questionnaires, Printed Packaging Questionnaires, Packaging Questionnaires, and Ingredient Questionnaires). eQuestionnaire displays a **Select Questionnaire Type** dialog box.

## Selecting a Questionnaire Type

Select a questionnaire type from the drop-down list. There can be up to four questionnaire types, depending on the configuration of the system. These questionnaire types map directly to the following GSM specification types:

- Ingredient
- Product
- Packaging
- Printed packaging

The content of the questionnaires varies by type and will be relevant only to the type that you choose.

After you select the questionnaire type, click **Create New**. An empty questionnaire displays. Figure 2-3, figure 2-4, and figure 2-5 show a packaging questionnaire:

Figure 2-3: New packaging questionnaire, top section

**eQuestionnaire**

**Questionnaire Label:** Beans - White Pe

**Questionnaire #:** 5013921

**Status:** New

**Access Level:**

**Date Sent:** ---

**Primary Owner:** Tom Paine

**Additional Administrators:**

**Due Date:** 11/29/2007

**Amber Date:** 3 days before due date

**Supporting Documentation Due Date:** 11/28/2007

**Comments / Guidance:** Please fill out this online form. We will use your responses to evaluate your offering.

*Annotations: Arrows point to 'Primary Owner' and 'Additional Administrators' with the text: 'These fields define who can see and use the questionnaire'*

Figure 2-4: New packaging questionnaire, middle section (Contact Information)

**Contact Information (for this Questionnaire)**

Supplier Contact		CPI Contact	
<b>Contact Name:</b>	Joe Foodman	Jane Smith	
<b>Company Name:</b>	Foods 'R' Us	Global Foods	
<b>Prodika SCRM #:</b>			
<b>Phone:</b>	555-234-2345	555-111-2222	
<b>Fax:</b>	555-321-4321	555-222-3333	
<b>Email Address:</b>	joefoodman@notarealdomain.com	janesmith@foodindustry.com	
<b>Street Address:</b>	555 Spring St.	888 Goodluck Ave.	
<b>City:</b>	Autumn Valley	Springfield	
<b>State/Province:</b>	State +	State +	
<b>Postal Code:</b>	10101	55555	
<b>Country:</b>	USA +	USA +	



Figure 2-5: New ingredient questionnaire, bottom section, showing Ingredient Attributes, Shelf Life, Extended Attributes, and a custom section

Edit Questionnaire

Ingredient Attributes	Required	Optional
Ingredient Name and Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supplier Ingredient #	<input type="checkbox"/>	<input type="checkbox"/>
Country Of Origin	<input type="checkbox"/>	<input type="checkbox"/>
Shipping Requirements / Instructions	<input type="checkbox"/>	<input type="checkbox"/>
Relative Density	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Shelf Life	Required	Optional
Shelf Life	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Storage Requirements / Instructions	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Relative Humidity	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Extended Attributes	Required	Optional	
DK Qualitative Multiselect	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Drop Dead Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Qualitative Checkbox test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Child Nutrition (Custom Section)

Soy Type	Minimum Amount	Minimum Percent Protein (as is basis)	Required
Isolated Soy Protein	%	%	<input checked="" type="checkbox"/>
Soy Flour	%	%	<input type="checkbox"/>
Soy Protein Concentrate	%	%	<input checked="" type="checkbox"/>

Edit Section

Add Section Remove Section

## Importing a Specification


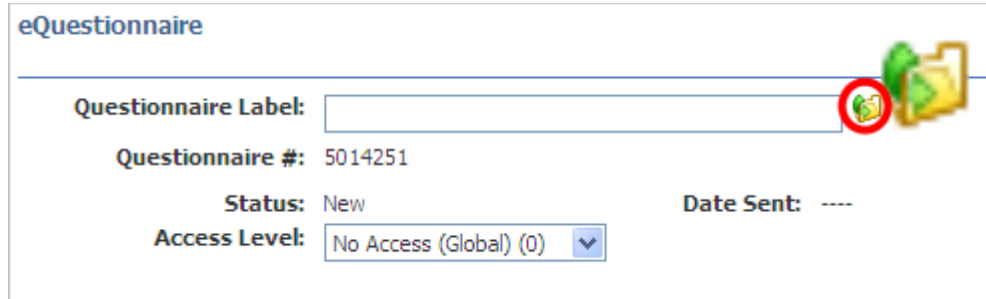
You can leverage an existing specification to create a questionnaire. To do so, on the newly created questionnaire, click the import data icon (  ) to the right of the Questionnaire Label field, as figure 2-6 shows below:

Figure 2-6: Importing a specification's data



The screenshot shows the 'eQuestionnaire' form. It includes the following fields and values:

- Questionnaire Label:** An empty text input field.
- Questionnaire #:** 5014251
- Status:** New
- Access Level:** No Access (Global) (0) with a dropdown arrow.
- Date Sent:** ---

To the right of the 'Questionnaire Label' field is an 'Import data' icon (a green folder with a document) which is circled in red.

A search page is displayed in which you can search and select the desired specification. Once you have selected the specification, data from the specification displays in the questionnaire.

## Defining Access to the Questionnaire

The user creating the questionnaire will be identified as the “primary owner”. The “primary owner” can be changed by the owner or an additional administrator. The Action Items list is based on the primary owner. The Additional Administrators field will be blank. You can modify either of these fields in the same way: click the linked label, search for the desired users, and select those users.

There are two modes for eQuestionnaire security. These modes are set by your Agile implementer when installing your application:

**Enabled**—In this mode, the primary owner and those users defined in the Additional Administrators field have read and write access to this questionnaire. All other users are unable to access the questionnaire.

**Disabled**—In this mode, all users with access to the eQuestionnaire application have read and write access to all questionnaires.

## Header Section

Figure 2-3, *New packaging questionnaire, top section*, on page 2-4 shows the header section of a questionnaire.

Key fields include:

**Questionnaire Label**—The name of the questionnaire. It can be the name of the imported specification or an open text field.

**Questionnaire #**—An auto-generated ID.

**Access Level** — Only relevant if Object Level Security is enabled in the system. Only users with the role of [EQ\_ACCESS\_LEVEL\_EDITOR] can change this field. Consult your Agile administrator if you need to have this role. When you import a specification, GSM copies the access level of the specification to this field.

**Due Date** — Must be set in order for a questionnaire to be sent.

**Primary Owner** — Used to determine what questionnaires are visible on the Action Items page. If eQ security is configured on, only the primary owner and those users defined in the Additional Administrators field have access to the questionnaire. If eQ security is configured off, all users with access to the eQuestionnaire application have access to the questionnaire.

**Amber Date** — Sets the number of days prior to the Due Date when this questionnaire becomes flagged as amber.

## Contact Information Section

This section contains contact information for supplier as well as yours. For an illustration of this section, please see figure 2-4, [New packaging questionnaire, middle section \(Contact Information\)](#), on page 2-4.

---

**Caution!** The eQ application uses email messages to communicate with both parties when they send and return questionnaires. For that reason, be sure to enter valid email addresses in both fields.

---

Key fields include:

**Supplier Email Address** (required)

**Contact Name** (required)

The Contact Name field contains the name of the supplier contact.

### To fill out contact information:

- 1 Click the **Contact Name** link. A Company and Facility search dialog box displays.
- 2 Search and select a Company or Facility. eQ displays a list of all associated users.
- 3 Select the user to be the contact. The dialog box closes and eQ populates the contact information section with the information of that user.  
(You can also manually enter the supplier contact information.)

## Edit Questionnaire Section

Use the Edit Questionnaire section to define which questions are required, optional, or not asked by the questionnaire. With the edit questionnaire feature, you identify specific information for the supplier to provide.

If a specification has not been imported, you can add questions by clicking **Add New** under the appropriate element. You must check either the Required or Optional box for each question before you can add it to the questionnaire.

Figure 2-7 shows a portion of the Edit Questionnaire section of a packaging questionnaire:

Figure 2-7: Packaging questionnaire, Edit Questionnaire section

Edit Questionnaire			
<b>Packaging Attributes</b>	<b>Required</b>	<b>Optional</b>	
Packaging Name and Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Supplier Packaging #	<input type="checkbox"/>	<input type="checkbox"/>	
Storage Requirements / Instructions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Relative Humidity	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Analytical Properties</b>	<b>Required</b>	<b>Optional</b>	
<a href="#">Add New</a>			
<b>Extended Attributes</b>	<b>Required</b>	<b>Optional</b>	
Ambient Conditions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Basis Weight	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Basis Weight Nylon	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Add New</a>			
<b>Environmental Waste</b>	<b>Required</b>	<b>Optional</b>	
<a href="#">Add New</a>			
<b>Supporting Documents</b>	<b>Required</b>	<b>Optional</b>	
<a href="#">Add New</a>			
<b>DRL Documents</b>			
<a href="#">Add New</a>			

Figure 2-8 below shows a portion of the Edit Questionnaire section of an ingredient questionnaire.

Figure 2-8: Edit Questionnaire section for an ingredient questionnaire

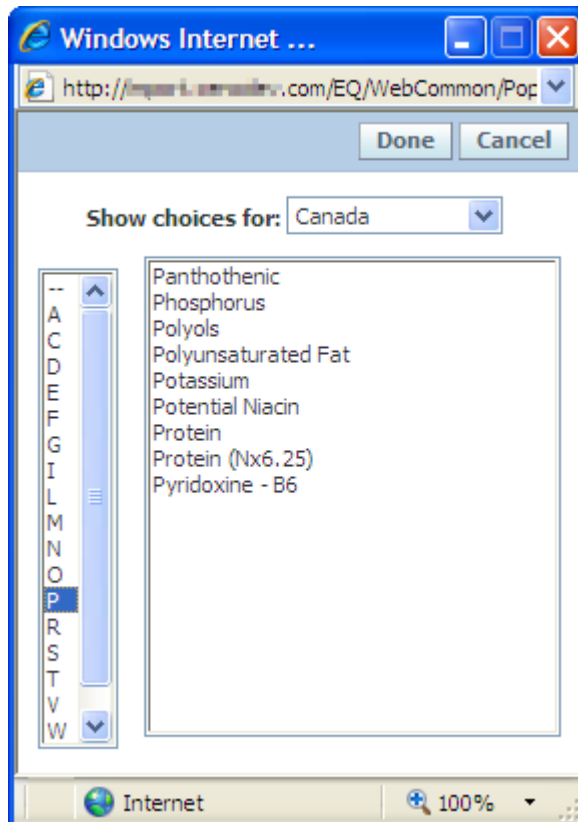
Compliance	Required	Optional
<b>Add New</b>		
<b>Compliance (User Group Selection)</b>		
<b>Add New</b>		
<b>Compliances (free text)</b>	<b>Required</b>	<b>Optional</b>
Compliances (known to contain) (free text)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Allergens (explicitly defined)</b>	<b>Max / 100g</b>	<b>Source</b>
<b>Add New</b>		

Some tables in this section contain “(User Group Selection)” in the header. You can use these tables to enable the supplier to add new data elements that have not been explicitly requested. You can limit the selection of data elements that a supplier can add by adding groups to this table. Only the data elements assigned to those groups will be available to the supplier to add.

For example, if you want a North American supplier to add all the compliance items that an ingredient complies with, you might add a group called “North America” to the “Compliance (User Group Selection)” table.

Likewise, you can use the “Nutrient Properties (User Group Selection)” to add a group of nutrients for the Nutrient Properties questions, as shown in figure 2-9 below. From such a group, suppliers can choose additional nutrients from a subset relevant to their business.

Figure 2-9: Nutrient Properties (User Group Selection) dialog box



## Saving a Questionnaire

At any point during creation of a questionnaire, you can save the questionnaire by clicking **Save** or **Save & Close** at the top right of the page and return to it later.

## Sending Questionnaire to Supplier

When you have completed the questionnaire, you can send it to the supplier specified in the Contact Information section by clicking **Send eQ** at the top right of the page.

If any required fields have not been completed, the relevant error message(s) will display at the top of the page and the questionnaire will not be sent. If completed correctly, the questionnaire will close and the status will change to “sent.”

You can view the questionnaire by selecting it from the Action Items page or by using the search tool. The supplier will receive an email indicating that there is an eQuestionnaire to complete.

## Creating a Copy of a Questionnaire

You can create a questionnaire based on a copy of another questionnaire.

### To create a new questionnaire based on an existing one:

- 1 Open the questionnaire to copy.
- 2 Click **Create New Copy** at the top right of the page.

## Receiving a Questionnaire - Supplier

After you have sent a questionnaire to a supplier, the supplier receives an email containing a link to the questionnaire to complete. The supplier can then click the link, which displays the Supplier Portal login page. After logging in, the supplier sees the questionnaire. For more information on the Supplier Portal, please see the *eQuestionnaire Supplier Portal User Guide*.

### Logging in to Supplier Portal

The Welcome page of the Supplier Portal displays options for preferred language. (These options vary based on your configuration.) After the supplier chooses a language, eQ displays the Login page. The supplier provides the email address that was used in the questionnaire along with a new password. If returning to the same questionnaire, the supplier must use the password used in the original login.

### Completing Questionnaire

The questionnaire contains instructions along with the data that you entered when creating it. Red stars indicate required fields. Suppliers can click any hyperlinked heading to add data elements to the table. Suppliers can also add attachments to the questionnaire.

### Saving a Questionnaire

Suppliers can save the questionnaire for completion later by clicking **Save - Not Completed**. Upon return, the supplier must enter the original email address and password to access the questionnaire.

### Returning a Questionnaire

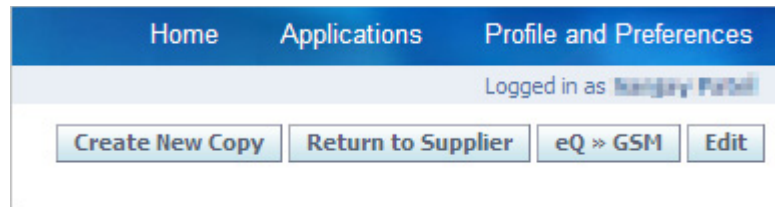
To send the questionnaire back to you, the supplier clicks **Completed - Send to**. eQ checks for any required fields and only returns the form if all required fields are complete.

If any required fields are incomplete, eQ informs the supplier as to what fields require completion.

## Processing a Completed Questionnaire

After a supplier has returned the questionnaire, eQ sends an email to the address listed for your company in the Contact Information section of the questionnaire. The email tells you which questionnaire was returned. You can then log into eQ, review the questionnaire, and complete the process by either integrating the data into the Global Specification Management (GSM) application or by returning the questionnaire to the supplier, as shown in figure 2-10 below.

Figure 2-10: Buttons that display in the upper right corner of eQ for a completed questionnaire



## Reviewing a Questionnaire

You can access the questionnaire to be reviewed from the Action Items page or from the questionnaire search pages. Upon opening the questionnaire, you can review the submitted data.

## Changing Ownership and Access Rights

When reviewing a returned questionnaire, you can change the Primary Owner and Additional Administrators fields. To change this information, click **Edit**. The page reloads and those two fields (located in the header section) display in editable mode. Click the hyperlinked field name to begin the process of changing that information.

## Exporting a Questionnaire to GSM

To update a GSM specification or to create a specification using data from this questionnaire, click **eQ >> GSM** at the upper right of the page.

### Selecting an Import Target

After you click **eQ >> GSM**, a dialog box asks how you would like to import the questionnaire. Your options are listed in table 2-2 below:

Table 2-2: Options for importing eQ data into GSM

Option	Action
<b>Create New</b>	Creates a new specification of the same type as the questionnaire
<b>Create New Issue</b>	Creates a new issue of an existing specification
<b>Update Existing</b>	Updates an existing specification without versioning it

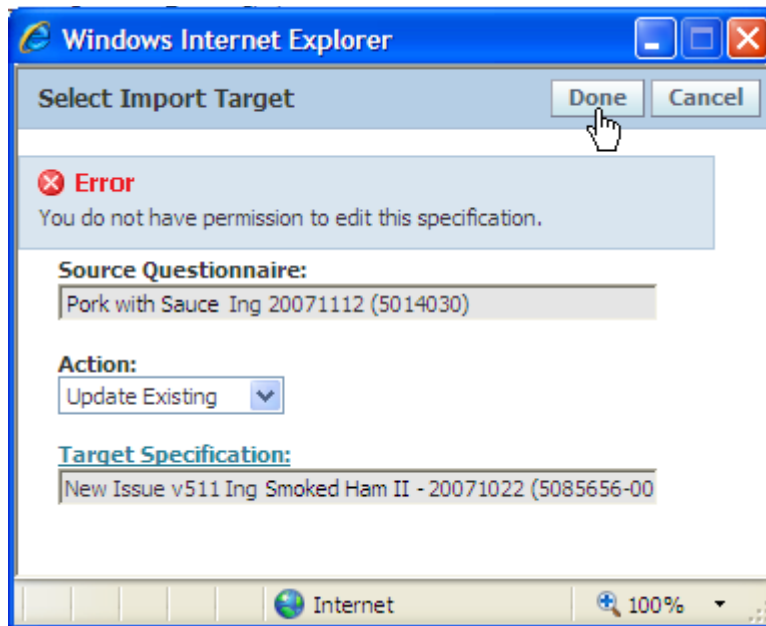
For the Create New Issue or Update Existing options, you must enter a target specification. If you create a new issue, eQ appends a version number to the issue.



To select this target, click the **Target Specification** link. eQ displays a dialog box with which you can search for a specification. Click **Done** when you have selected the target specification.

**Note** If you do not have permission to edit an existing GSM specification or to create a new GSM specification, eQ displays an error message (as shown in figure 2-11) after you click **Done**.

Figure 2-11: Insufficient editing permissions error message



## Exporting Data to GSM





After you have successfully selected an import target, eQ displays a page containing tabs that show the questionnaire data along with the data from the specification that you are importing data into, as shown in figure 2-12 below.

Figure 2-12: eQuestionnaire page, Product Attributes section, showing target and source for export from a questionnaire to a GSM specification



### eQuestionnaire

Summary
Product Attributes
Formulation
Compliance
Nutrients/Properties
Supporting Documents

#### Product Attributes

From eQuestionnaire		Current Specification
<b>Product Name:</b> Create a new prod spec based on eQ 5085194	  	<b>Specification Name:</b> <input style="width: 100%;" type="text" value="4:1 Beef Patty"/>  <b>Spec #:</b> <input style="width: 150px;" type="text" value="5084160-001"/>  <b>Category/SubCategory/Group:</b> <input style="width: 100%;" type="text" value="Beef"/> <input style="width: 100%;" type="text" value="Ground"/> <input style="width: 100%;" type="text" value="Fresh"/>  <b>Reason for Change:</b> <input style="width: 100%;" type="text" value="shape change"/>  <b>Approved for Use In: Business Unit(s):</b> <input style="width: 100%;" type="text" value="AB North America"/>  <b>Approved for Use In: Countries:</b> <input style="width: 100%;" type="text" value="Armenia, Aruba, Australia, Austria"/>
<b>Description:</b> Create a new prod spec based on eQ 5085194		<input style="width: 100%; height: 50px;" type="text" value="(new spec based on eQ 5085194)"/>
		<b>Classification:</b> <input style="width: 100%;" type="text" value="Critical"/>
<b>Storage Instructions:</b> Create a new prod spec based on eQ 5085194		<input style="width: 100%; height: 40px;" type="text" value="Keep frozen at all times"/>

On this page you can view both the questionnaire data and the specification data at the same time and can selectively import data from the questionnaire to the specification. Between the questionnaire data and the specification data, there is an arrow for moving the data from the questionnaire to the specification. When clicked, this arrow overwrites the displayed specification data.

On a table that has multiple rows, you can use the move all data icon (  ) in the first row to move all the rows of that table at one time. Most rows contain a move single row icon (  ) that can move only that row individually. You can also override the specification data manually.

If your administrator has enabled Object Level Security, you can import data to only those specifications for which you have sufficient user privileges. If you do not have sufficient user privileges, the system will not display the data. For more information on Object Level Security, please refer to the *Agile Product Lifecycle for Process Administrator's Guide*.

You can save the updated specification by clicking **Save** at the upper right of the page.

To open the new specification in edit mode, click **Edit Specification**.

Once you have successfully imported the data and saved the specification, the status changes to “submitted” and the Action Items table no longer displays the questionnaire.

## Returning a Questionnaire to a Supplier

After reviewing the questionnaire, if you find that the supplier needs to provide more information, you can return the questionnaire to the supplier. To do so, click **Return to Supplier**. eQ displays a dialog box that enables you to write a message to the supplier in the Comments/Guidance field.

Once you have filled in this information, you can click **Return to Supplier**. eQ redisplay the Action Items page. The process then starts over with eQ sending the supplier an email about the questionnaire that needs to be completed.

## Searching for Questionnaires

You can retrieve all questionnaires created by clicking the appropriate questionnaire type in the left navigation panel. eQ will then display a search form for that questionnaire type. Using the search page, you can retrieve the questionnaires by using many of the questionnaire's attributes as search criteria.

The search results will contain all questionnaires that match your defined search criteria. You can open only the questionnaires for which you have sufficient access permissions.

For more information on using the search form, please see the *Agile Lifecycle Management for Process Getting Started Guide*.

