



Agile Product Lifecycle Management

Product Quality Management User Guide

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Preface

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

Note To read the PDF files, you must use the free Adobe Acrobat Reader version 7.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) <http://www.adobe.com>.

The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> can be accessed through **Help > Manuals** in both Agile Web Client and Agile JavaClient. If you need additional assistance or information, please contact My Oracle Support (<https://support.oracle.com>) for assistance.

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Readme

Any last-minute information about Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html>

Agile Training Aids

Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html) http://www.oracle.com/education/chooser/selectcountry_new.html for more information on Agile Training offerings.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Product Quality Management

This chapter includes the following:

▪ Before you Begin	1
▪ What's New in PQM 9.3	1
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▪ Product Service Requests	2
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Before you Begin

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

- *Agile Database Installation Guide*
- *Installing Agile PLM for OAS*
- *Installing Agile PLM for WebLogic*
- *Getting Started with Agile PLM*
- *Agile PLM Administrator Guide*

For details about common terms appearing across all Agile PLM modules, see the *Getting Started with Agile PLM* guide.

What's New in PQM 9.3

Changes across Agile PLM 9.3 User Interface have created a few changes in the PQM module as well. Listed below are generic enhanced features and links, which lead you to detailed documentation on some of the commonly used features of PQM.

Enhanced generic features across Agile PLM:

- Preview pane replaced by Quick View: The Quick View dialog appears when you position the cursor on an object. It gives you the object details and allows you to perform a few actions.
- Enhanced Add feature allows you to add/remove objects faster by either drag and drop option or the copy and paste option.
- Views and Personalize menu replace the filter option in the Web Client. See also: [Relationships Table](#) on page 39.
- The Edit Rule button is now available on the Relationships table and the Quick View dialog.

Commonly used features in Agile PQM:

- **Creating a PSR from an Item:** Icon changes. Views and Personalize menu replaces the filter option in the Web Client.

- **Search for PSRs and QCRs:** The Execute a Quick Search, Custom Search and the Advanced Search results returns PSRs or QCRs matching the set criteria. For details, see [Search for PSRs or QCRs](#) on page 21.
- **Creating PSR using Save As:** Additional features now allow you to reference existing files, create new copies of the file or does not include files, when you copy PSRs with Attachments. See Step 5 of the instructions of [Creating PSR using Save As](#) on page 20.
- **Create a QCR from a PSR:** Icon changes. Views and Personalize menu replace the filter option in Web Client.
- **Adding Items to the Affected Items tab of a PSR:** You can add items to the Affected Items tab of a PSR using the Search/Create Button. See [Search to add](#) on page 28 to search for existing Items and [Create to add](#) on page 28 to create new Items. Adding objects is now made faster by using the drag/drop option, and the copy/paste option. See also: [Adding Items to the Affected Items tab of a PSR](#) on page 28.
- **Adding Objects to the Relationships tab of a PSR:** Enhanced add features, the appearance of the Edit Rule on the Relationships table and also in the Quick View dialog message bar. See also: [Adding Objects to the Relationships tab of a PSR](#) on page 40. [Adding Relationship Rules](#) on page 43. [Editing Relationship Rules](#) on page 44.
- **Viewing Quality issues against a Customer or Supplier:** Enhanced search results help you view Quality issues on PSRs, QCRs, Customers and Suppliers. See also [Viewing Quality issues against a Customer or Supplier](#) on page 15.

An Overview of Product Quality Management

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

As alternate quality management packages enter the market, customers demand quality products at a lower cost, and a reduced product lifecycle. Quality incidents reported by the customers help you detect defects and resolve them responsively. Tracking defects and finding the root cause of the defects in a timely manner are keys to effective defect reduction and improving product quality.

The Agile PQM solution includes Product Service Requests (PSRs) and Quality Change Requests (QCRs). PSRs manage Problem Reports and Non-Conformance Reports. QCRs create and manage Audits, and Corrective and Preventive Actions (CAPAs).

Product Service Requests

Product Service Requests report quality incidents, and aggregate a number of other PSRs to a single PSR. The PSR class includes **Problem Reports (PRs)** and **Non-Conformance Reports (NCRs)**. PRs report generic quality incidents and NCRs report material deviations from specifications and other specific quality issues. For details, see [Working with Product Service Requests](#) on page 17.

Problem Reports

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

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

Non-Conformance Reports

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

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

Quality Change Requests

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

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

You can use QCRs to:

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

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

For more details, see [Working with Quality Service Requests](#) on page 49.

Audits

An Audit is a pro-active process of verifying compliance with quality requirements. Default Audit workflows are different from CAPA workflows. For details, see [Workflow tab of a QCR](#) on page 57.

Corrective and Preventive Actions

Corrective and preventive actions (CAPAs) address generic quality problems for one or more PSRs. A CAPA could result in the creation of one or more changes that lead to fixing the problems. A CAPA is a routable object and a workflow controls it. CAPA workflows vary for different workflow statuses. For details, see Workflow tab of a QCR.

Tracking Quality

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

Tracking Quality Roles

Product Quality Management provides these roles:

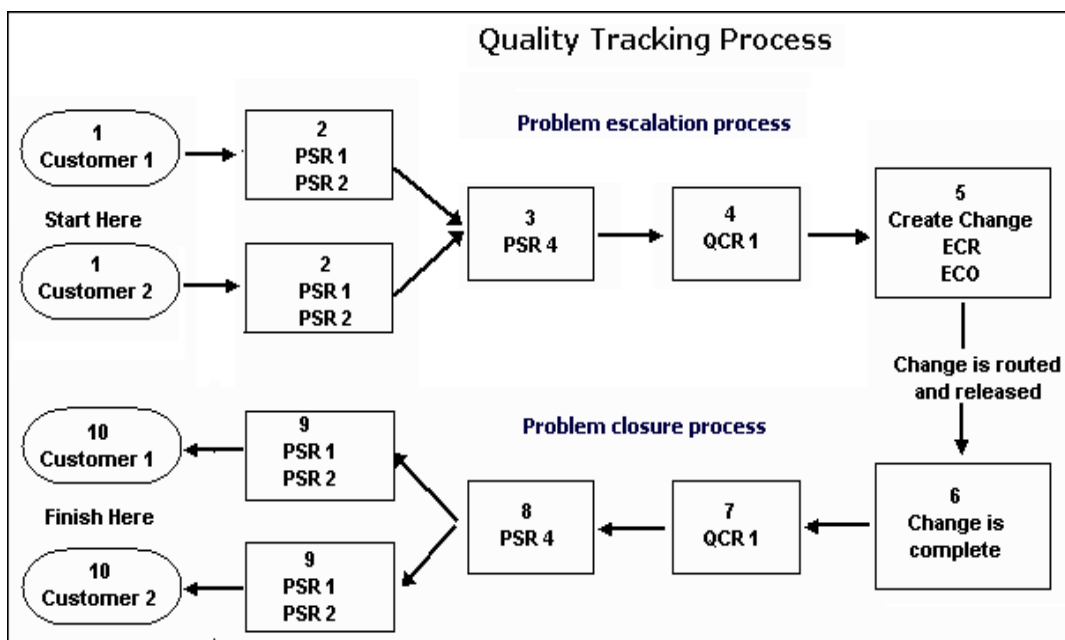
Quality Analyst – The role of a Quality Analyst allows you to submit Problem Reports (PRs) and Non-Conformance Reports (NCRs) and manage their resolution.

Quality Administrator – The role of a Quality Administrator allows you to manage Audits and CAPAs.

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

Tracking Quality Process

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



1. Two customers report quality incidents. Customer 1 and Customer 2
2. The support division creates problem service requests (PSRs) for the reported incidents.
3. PSR-1, PSR-2, PSR-3 for Customer 1.

PSR-1, PSR-2, PSR-3 for Customer 2.

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

Quality Related SmartRules

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

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

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

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

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

Quality Searches

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

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

- Released QCRs
- Closed QCRs
- Unassigned Submitted QCRs
- Open QCRs

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

Quality Reports

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

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

- [Failure Trend Report](#) on page 6
- [Quality Activity Report](#) on page 8
- [Quality Backlog Report](#) on page 10
- [Quality Cycle Time Report](#) on page 11
- [Quality Metrics Report](#) on page 13

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

A Quality Report consists of the following tabs:

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

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

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

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

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

For more details on the tabs of Quality Reports, see the *Getting Started with Agile PLM* guide.



Failure Trend Report

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


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

To run a Failure Report Trend:

1. In the navigation pane, navigate to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Failure Trend Report**.

2. Click the **Execute** button. A Run Failure Trend Report wizard opens.
3. In the Select Layout and Configuration page, select a Layout from the list.
 - a. Click the **Edit**  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
 - b. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields** column using the right arrow. You can also place them in the required ascending or descending order using arrows.
 - c. Click **Save** to save the changes or **Close** to close the palette.
4. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Click **Save** to save the changes or **Close** to close the palette.
5. Click the **Create**  button to create a new layout. The Layout Presentation palette opens.
6. In the Format frame,
 - a. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields** column using the right arrow. Place them in the required ascending or descending order using arrows.
 - b. Click **Save** to save the changes or **Close** to close the palette.
7. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Click **Save** to save the changes or **Close** to close the palette.
8. Select a format for the generated report from the **Output Format** list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
9. Select the **Save a copy of the report in the historical reports** check box to save the generated report.

Note The **Save a copy of the report in the historical reports** check box does not appear if you select the Standard output format.

10. Click **Next**.
11. The Select or Create a Query page appears. The Failure Trend Report lets you search for Product Service Requests to use in the report.
 - a. Select the **All Product Service Requests** check box to choose from all the PSRs.
 - b. Select the **Saved Search** check box to choose from existing PSRs.
 - c. Click the **Search**  palette and choose a value from the Saved Searches list.
 - d. Select the **Advanced Search** check box.
 - e. Click **Define Query**. A Report Search palette opens. Choose from the list or enter the necessary details to define the query.
 - f. Click **Clear** to clear the selection, **Finish** to continue and **Close** to close the palette.

Note For details about the **Search** palette, see the *Getting Started with Agile PLM* guide.

12. Click **Next** to proceed to the next step or **Back** to edit the Query.

13. The Define Report page appears.

In the **Time Period** frame,

- a. Click the calendar and select a **From** date.
- b. Click the calendar and select a **To** date.
- c. Select a **Time Unit** from the list.

14. In the **Additional Report Criteria** frame,

- a. Select a value from the **Trend By** list.
- b. Select the check box to display the **Product Service Requests**.
- c. Select the check box to **Exclude Empty Columns**.

15. Click **Finish** to display the report.

16. A **Get Attachment** dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the **Close** button, without saving it.

Save: Saves the report to the Historical Report tab.

Print: Prints the generated report.

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

Quality Activity Report

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


To run a Quality Activity Report:

1. In the navigation pane, navigate to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Activity Report**.

Note For details on how to run the report, see the chapter 'Working with Reports' in the *Getting Started with Agile PLM* guide.

2. Click **Execute**. A Run Quality Activity Report wizard opens.

3. In the Select Layout and Configuration page, select a **Layout** from the list.


4. Click the **Edit**  button to modify an existing layout. The Default Layout For PSR palette opens. Modify required fields.

5. In the Format frame,


- a. Select properties from **Hidden Fields** column and move them to **Displayed Fields** column using the right arrow. You can also place them in the required ascending or descending order using arrows.
- b. Click **Save** to save the changes or **Close** to close the palette.

6. In the Properties frame,

- a. Enter a name in the **Name** field.
- b. Select the type of **Access**.
- c. Select the **Paper Size** from the list.

- d. Select the **Orientation** of the paper.
 - e. Select the **Layout Type**.
 - f. Select the **View** in format of the report.
 - g. Click **Save** to save the changes or **Close** to close the palette
7. Click the **Create**  button to create a new layout. The **Layout Presentation** palette appears.
 8. In the Format frame:
 - a. Select properties from **Hidden Fields** column and move them to **Displayed Fields** column using the right arrow. Place them in the required ascending or descending order using arrows.
 - b. Click **Save** to save the changes or **Close** to close the palette.
 9. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Select a **Layout Type**.
 - f. Select the **View** in format for the report.
 - g. Click **Save** to save the changes or **Close** to close the palette.
 10. Select a format for the generated report from the **Output Format** list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
 11. Select the **Save a copy of the report in the historical reports** check box to save the generated report.

Note The **Save a copy of the report in the historical reports** check box does not appear if you choose the Standard output format.

12. Click **Next**.
13. The **Select Date Range** page appears.
 - a. Click the calendar and select a From date.
 - b. Click the calendar and select a To date to show the time covered.
14. Click **Next**.
15. The **Select Additional Parameters** page appears. In the Workflow and Status Change Criteria frame,
 - a. Select a workflow from the **Workflow Type** list.
 - b. Click the **Search**  palette to effect a change in the **Status Changes** to field. A Change palette appears. Select and double-click the item to move it to the **Status Changes** to field.
 - c. Click **Finish** to display the report.

A **Get Attachment** dialog prompts you to download the report.
16. Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the **Close** button without saving it.

Save: Saves the report to the Historical Report tab.



Print: Prints the generated report.

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


Quality Backlog Report

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

To run a Quality Backlog Report:

1. In the navigation pane, go to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Backlog Report**.
2. Click the **Execute** button. A Quality Backlog Report wizard opens.
3. In the Select Layout Configuration page, select a **Layout** from the list.
 - a. Click the **Edit**  button to modify an existing layout. The Default Layout palette opens. Modify required fields.
 - b. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields** column using the right arrow. Place them in the required ascending or descending order using arrows.
 - c. Click **Save** to save the changes or **Close** to close the palette.
4. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Select a **Layout Type**.
 - f. Select a Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. Place them in the required ascending or descending order using arrows.
 - g. Click **Save** to save the changes or **Close** to close the palette.
5. Click the **Create**  button to create a new layout. The Layout Presentation palette opens.
6. In the Format frame,
 - a. Select properties from the Hidden Fields column and move them to the Displayed Fields column using the right arrow. Place them in the required ascending or descending order using arrows.
 - b. Click **Save** to save the changes or Close to close the palette.
7. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Select a **Layout Type**.
 - f. Select a **View** in format for the report.
 - g. Click **Save** to save the changes or **Close** to close the palette.
8. Select a format for the generated report from the **Output Format** list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
9. Select the **Save a copy of the report in the historical reports** check box to save the generated report.

Note The **Save a copy of the report in the historical report** check box does not appear if you select the Standard output format.

10. Click **Next**.
11. The Select or Create a Query frame appears. The Quality Backlog Report lets you search for **Product Service Requests** to use in the report.
 - a. Select the **All Product Service Requests** check box to choose from all the PSRs.
 - b. Select the **Saved Search** check box.
 - c. Click the **Search**  palette and choose a value from the saved Searches list.
 - d. Select the **Advanced Search** check box.
12. Click **Define Query**. A Report Search palette opens.
 - a. Choose from the list or enter the necessary details to define the query.
 - b. Click **Clear** to clear the selection, **Finish** to continue and **Close** to close the palette.
13. Click **Next** to proceed to the next step or **Back** to modify the Query. The Define Report frame appears.
14. In the **Time Period** frame,
 - a. Use the calendar to select a **From** date.
 - b. Use the calendar to select a **To** date.
 - c. Choose a **Time Unit** from the list.
15. In the **Status Change** frame,
 - a. Select a workflow from the **Workflow** list.
 - b. Select a **Starting Status**.
 - c. Select a **To status**.
16. In the **Additional Report Criteria** frame,
 - a. Select a value from the **Trend By** list.
 - b. Select the check box to display the **Product Service Requests**.
 - c. Select the check box to **Exclude Empty Columns**.
17. Click **Finish** to display the report.
18. A **Get Attachment** dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the **Close** button without saving it.

Save: Saves the report to the Historical Report tab.

Print: Prints the generated report.



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

Quality Cycle Time Report

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


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

To run a Quality Cycle Time Report:

1. In the navigation pane, go to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Cycle Time Report**.
2. Click **Execute**. A Quality Cycle Time Report wizard appears.
3. In the Select Layout and Configuration page, select a **Layout** from the list.
4. Click the **Edit**  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
In the Format frame,
 - a. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields** column using the right arrow. Place them in the required ascending or descending order using arrows.
 - b. Click **Save** to save the changes or **Close** to close the palette.
5. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Select a **Layout Type**.
 - f. Select a **View in** format for the report.
 - g. Click **Save** to save the changes or **Close** to close the palette.
6. Alternately, click the **Create**  button to create a new layout. The **Layout Presentation** palette opens.
7. In the Format frame,
 - a. Select properties from the **Hidden Properties** column and move them to the **Displayed Properties** column using the right arrow. Place them in the required ascending or descending order using arrows.
 - b. Click **Save**.
8. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Select a **Layout Type**.
 - f. Select a **View in** format for the report.
 - g. Click **Save** to save the changes and **Close** to close the palette.
9. Select a format for the generated report from the **Output Format** list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
10. Select the **Save a copy of the report in the historical reports** check box to save the generated report.

Note The **Save a copy of the report in the historical reports** check box does not appear if you select the Standard Output Format.
11. Click **Next**.
12. The Select or Create a Query page appears. The Quality Cycle Time Report lets you search for

Product Service Requests to use in the report.

- a. Select the **All Product Service Requests** check box to choose from all the PSRs.
 - b. Select the **Saved Search** check box.
 - c. Click the **Search**  palette and choose a value from the Saved Searches list.
 - d. Select the **Advanced Search** check box.
13. Click **Define Query**. A Report Search palette opens.
 - a. Choose from the list or enter the necessary details to define the query.
 - b. Click **Clear** to clear the selection, **Finish** to continue and **Close** to close the palette.
 14. Click **Next** to proceed to the next step or **Back** to modify the Query. The Select or create a Query page appears.
 15. In the **Time Period** frame,
 - a. Use the calendar to select a **From** date.
 - b. Use the calendar to select a **To** date.
 - c. Choose a **Time Unit** from the list.
 16. In the **Status Change** frame,
 - a. Select a workflow from the **Workflow** list.
 - b. Select a **Starting Status**.
 - c. Select a **To Status**
 17. In the **Additional Report Criteria** frame,
 - a. Select a value from the **Trend By** list.
 - b. Select the check box to display the **Product Service Requests**.
 - c. Select the check box to **Exclude Empty Columns**.
 18. Click **Finish** to display the report.
 19. A **Get Attachment** dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print or export the report. The report is lost if you click the **Close** button without saving it.

Save: Saves the report to the Historical Report tab.


Print: Prints the generated report.


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

Quality Metrics Report

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

To run a Quality Metrics Report:


1. In the navigation pane, go to **Reports > Reports and Analytics > Standard Reports > Quality Reports > Quality Metrics Report**.
2. Click **Execute**. The Quality Metrics Report wizard appears.
3. From the Select Layout and Configuration page, select a **Layout** from the list.
4. Click the **Edit**  button to modify an existing layout. The Default Layout dialog opens. Modify the required fields.
 - a. Select properties from the **Hidden Fields** column and move them to the **Displayed Fields**

- column using the right arrow. Place them in the required ascending or descending order using arrows.
- b. Click **Save** to save the changes or **Close** to close the palette.
 5. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Select a **Layout Type**.
 - f. Select a **View in** format for the report.
 - g. Click **Save** to save the changes or **Close** to close the palette.
 6. Alternately, click the **Create**  button to create a new layout. The **Layout Presentation** palette opens.
 7. In the Format frame,
 - a. Select properties from the **Hidden Properties** column and move them to the **Displayed Properties** column using the right arrow. Place them in the required ascending or descending order using arrows.
 - b. Click **Save** to save the changes and **Close** to close the palette.
 8. In the Properties frame,
 - a. Enter a name in the **Name** field.
 - b. Select the type of **Access**.
 - c. Select the **Paper Size** from the list.
 - d. Select the **Orientation** of the paper.
 - e. Select a **Layout Type**.
 - f. Select a **View in** format for the report.
 - g. Click **Save** to save the changes and **Close** to close the palette.
 9. Select a format for the generated report from the **Output Format** list. Choose from a list of formats - PDF, WORD, EXCEL, HTML, and STANDARD.
 10. Select the **Save a copy of the report in the historical reports** check box to save the generated report.

Note The **Save a copy of the report in the historical reports** check box does not appear if you select the Standard output format

11. Click **Next**.

The Select or Create a Query page appears. The Quality Metrics Report lets you search for Product Service Requests to use in the report.

 - Select the **All Product Service Requests** check box to choose from all the **PSRs**.
 - Select the **Saved Search** check box.
 - Click the **Search**  palette and choose a value from the list of Saved Searches.
 - Select the **Advanced Search** check box.
12. Click **Define Query**. A Report Search palette opens.
 - a. Choose from the list or enter the necessary details to define the query.
 - b. Click **Clear** to clear the selection, **Finish** to continue and **Close** to close the palette.

13. Click **Next** to proceed to the next step or **Back** to edit the Query. The Define Reports page appears.
14. In the **Time Period** frame,
 - a. Use the calendar to select a **From** date.
 - b. Use the calendar to select a **To** date.
 - c. Choose a **Time Unit** from the list.
15. In the **Status Change** frame,
 - a. Select a workflow from the **Workflow** list.
 - b. Select a status from the **Status Type**.
16. In the **Additional Report Criteria** frame,
 - a. Select a value from the **Trend By** list.
 - b. Select the check box to display the **Product Service Requests**.
 - c. Select the check box to **Exclude Empty Columns**.
17. Click **Finish** to display the report.
18. A **Get Attachment** dialog prompts you to download the report.

Click the buttons that appear at the top of the generated report to save, print, or export the report. The report is lost if you click the **Close** button without saving it.

Save: Saves the report to the Historical Report tab.

Print: Prints the generated report.

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

Quality Tracking Tabs

You can link Quality information on certain tabs and fields with information about objects such as items, customers, and suppliers. The organization can then assess the quality risk of incorporating certain parts into their designs.

- The Quality tab for items displays all PSRs reported against that item.
- The PSRs tab of a Customer object lists all quality incidents reported by the customer. This helps you gauge customer satisfaction.
- The PSRs tab of a Supplier object lists all quality incidents filed against the supplier. This can affect purchasing by helping you gauge the quality performance of a supplier so that you can establish a rating or preference for that supplier.

Viewing Quality Issues against Customers and Suppliers

Listed below are a number of ways you can view Quality issues against Customers or Suppliers.

- **Execute a Quick Search** - Fastest way to find PSRs, QCRs, Customers, and Suppliers on the Home Page.
- **Custom Search** - A combination of different queries returns PSRs with matching criteria. For example, Product Service Requests: Customer is not Null OR Supplier is not Null.
- **Advanced Search** - Most effective way of finding objects setting multiple criteria and filtering down on objects. For example, Items with PSRs of Customer/Suppliers, which have QCRs initiated. Items only have PSRS for Customers/Suppliers but QCR is not initiated. Items having PSRs & QCRs and Changes associated with them.

- **View Parts** - The Quality tab of Parts displays the PSR & QCR numbers along with Customer and Supplier details
- **Search Personalization** - Format a search and choose the required View by using the Personalize menu. For example, View all the QCRs/PSRs for Customers and Suppliers in displayed fields.

Working with Product Service Requests

This chapter includes the following topics:

- [Creating Product Service Requests](#) on page 17
- [Cover Page tab of a PSR](#) on page 21
- [Affected Items tab of a PSR](#) on page 26
- [Related PSR tab](#) on page 30
- [Relationships tab](#) on page 35
- [Workflow tab of a PSR](#) on page 45
- [Attachments tab of a PSR](#) on page 47
- [Submitting and Routing PSRs](#) on page 46

Creating PSRs


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

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

Creating a Product Service Request

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

To create a PSR in Java Client:


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

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

For more information about the cover page, see [Cover Page tab of a PSR](#)

To create a PSR in Agile Web Client:

1. Launch Agile Web Client.
2. On the main toolbar click the **Create New** menu.
3. Select **Product Service Requests> Problem Report or Non-Conformance Report** from the drop-down menu. The Create New dialog appears.

4. Select a required subclass (NCR or Problem Report) from the **Type** list.
5. In the **PSR Number** field, accept the default number, enter a number, or click the **Autonumber**  button to generate a new number.

6. Click **Save**.

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

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

To assign a workflow to the PSR:


1. Open a **PSR** and click the **Edit** button.
2. Select a workflow from the **Workflow** list. For details, see Workflow tab of a PSR.
3. Click **Save**.

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

Creating a PSR from an Item

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

To create a PSR from an Item in Java Client:


1. Open an **Item** from which you want to create a **PSR**.
2. Select **Create New Product Service Requests** from the **Actions** menu.
3. In the New dialog:
 - a. Choose the desired subclass (NCR or Problem Report) from the **Type** list.
 - b. In the **PSR Number** field, accept the default number, enter a number, or click the **Autonumber**  button to generate a new number.
 - c. Choose a **Quality Analyst** from the list.
 - d. Click **OK**.

Agile Java Client creates the **PSR** and displays it with the **Cover Page** tab on top in the edit mode.

4. Enter values in relevant fields on the **Cover Page** tab.
5. Click **Save** to save the changes.

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

To create a PSR from an Item in Web Client:

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

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

Creating a PSR to Aggregate multiple PSRs

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

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



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

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

1. Open a **PSR** you want to use as the basis for a new **PSR** or choose **File > Save As** or right click and choose **Save As to**. See, [Creating PSR using Save As](#) on page 20.
2. The **PSR** opens with the Cover Page in the edit mode. On the **Affected Items** tab, do not add any items. On the **Related PSR** tab, add related **PSRs**.
3. Click **Add** to add related **PSRs**.

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

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

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

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


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

		Note: Only if you assign a workflow to both objects (parent and child) on the Cover Page, can you specify the PSR Event status.
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
Creating a PSR using Save As

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

To create a PSR using Save As in Java Client:

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

To create a PSR using Save As in Web Client:

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

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

Fields copied from old object	Pre-populated fields
Category, PSR Type, Problem Description, Severity, Product Line(s)	Originator
Page two and Page Three flex fields	Date Originated
Copies all the item information from the Affected Item tab.	Status field is set to Unassigned by default.
Copies all attachments from the Attachments tab	
History tab reflects the source and target objects	

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

The PSRs you create remain in the system until you delete them. Deleting PSRs does not remove them from the Agile database. To delete PSRs permanently, you need to hard-delete them. For details on deleting PSRs and QCRs, see [Deleting Agile Objects](#) on page 69.

Searching for PSRs or QCRs

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

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

To run a quick search:

1. Select an object and enter a wildcard (*).
 2. Click the **Execute a Quick Search** button.
- The Search results return a list of objects.

Note Select the Convert to Advanced Search option, if required.

For details, see the 'Searches' chapter in the *Getting Started with Agile PLM* guide.

Cover Page tab of a PSR

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

Fields	Completed	Indicates
PSR Number	Automatically, when you create it. Note: In the Admin setting if 'Autogenerate' is set to 'Yes' then the number will be generated automatically, otherwise you have to enter PSR number.	The number assigned to the PSR when you create it. For a Problem Report, the number is pre-fixed with PR. For a Non-Conformance Report, it is pre-fixed with a NCR.

PSR Type	Automatically, when you create it.	The Type (subclass) selected when you create the PSR.
Category	Manually	The list of categories defined by the Agile PLM Administrator. Examples: Customer Complaint, Audit – External, Preventive Action
Description	Usually manually, can contain a default.	Maximum number of bytes is set by the Agile PLM Administrator; up to 4000 bytes, including spaces and carriage returns (which count as two bytes).
Customer	Manually	The list of customers associated with this PSR.
Supplier	Manually	List of suppliers who initiated the incident or are the cause of the incident.
Severity	Manually	The list of severities defined by the Agile PLM Administrator.
Disposition	Manually	<p>The list of dispositions defined by the Agile PLM Administrator.</p> <p>The Disposition field displays a code that represents the way in which a PSR is being resolved.</p> <p>Examples of dispositions are Replace Component and Rework to Spec.</p>
Expected Resolution Date	Manually	Date when the PSR will be resolved.
Quality Analyst	May be provided automatically by the workflow; otherwise selected manually from a list. Departments appear first in the list, followed by individual user names.	<p>The default Quality Analyst.</p> <p>If you define the workflow to notify the default Quality Analyst, the department or user in this field receives notifications about the PSR. If this field is blank, then the notifications are sent to every quality analyst on the list.</p> <p>If the workflow is at the Pending status and has a Quality Analyst defined than that User receives notification.</p> <p>If the notification definition in the workflow is blank, then no notifications are sent.</p>
Workflow	<p>If more than one workflow applies to the PSR, the workflow is selected manually; the workflow selection can be changed as long as the PSR is in the Pending status. Selecting a workflow switches the PSR to the Unassigned status.</p> <p>You cannot move the PSR to the next status from the Unassigned</p>	The name of the workflow used to move this PSR through the quality tracking process.


	state without assigning a workflow.	
Status	Automatically, when created	The current workflow state of the PSR. If you do not select a workflow, the status remains Unassigned.
Originator	Automatically, when created.	The default creator of the PSR. Also contains a list of other problem report originators.
Date Originated	Usually automatically, when created.	The date you create the PSR.
Date Submitted	Automatically generated based on workflow status.	The date when the PSR moves to the Submitted status in the workflow.
Date Released	Automatically generated based on workflow status.	The date when the PSR moves to the Released status in the workflow.
Final Complete Date	Automatically generated based on workflow status.	The date when the PSR moves to the Complete status in the workflow.
Aggregate PSR Number	Automatically filled in when you add PSR(s) to the Related PSR tab.	Automatically fills the parent PSR number.
Product Line(s)	Manually	The product lines this PSR affects.

Updating the Cover Page of a PSR

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



To edit the Cover Page of a PSR in Java client:

1. Open a **PSR**. The **PSR** number and the **PSR** type fields are pre-populated.
2. Select a value from the list in the **Category** field.
3. Enter text in the **Description** field.
4. Click the link to search for **Customers**.
5. A Select Objects dialog appears. Enter * and click the **Search** button.
6. From the Search results list, select an object and move it to the Selected Objects column using the arrow.
7. Click **OK**.
Alternatively,
 - Click the Saved Searches tab and search in the available folders.
 - Click the shortcuts tab and search in Recently Visited folder and the Bookmark folder.
 - Click the **Advanced Search** link.
 - a. In the Advanced Search dialog, select the Create New or Use a Saved Search option.
 - b. Choose from lists or enter text as required.
 - c. Click **Run** to run the search, Click **Save** to save the changes, click **More** for additional criteria

- and click **Close** to close the dialog.
- d. Click **OK** to save the changes or **Cancel** to return to the Cover Page.
8. Choose **Severity** of the **PSR** from the list.
9. Choose a **Disposition** from the list.
10. Use the calendar  and select an **Expected Resolution Date**.
11. Click **Save** to save the changes.




The **Cover Page** displays modified values.

To edit the Cover Page of a PSR in Web Client:




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


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

To search for existing customers or Suppliers:

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

To create new customers:

- b. Click the  button to create new Customers or Suppliers.
 - c. A Create New dialog appears. In the **Type** field, select a **Customer** from the list.
 - d. In the **Number** field, enter a number or click the **Autonumber**  button.
 - e. Enter **Customer Name**.
 - f. Click **Save**.
6. Choose **Severity** of the **PSR** from the list.
7. Choose a **Disposition** from the list.
8. Click the calendar  to select a resolution date. You can also use the combination **Ctrl + L** keys to launch the calendar.

9. Choose a **Workflow** from the list. Updates of the workflow status are automatic as the **PSR** moves to the next status.
10. The **Originator** and **Quality Analyst** fields are pre-defined.
11. Click the  palette and choose one or more **Product Lines** that this **PSR** affects. You can also use the combination **Ctrl + L** keys.
12. Click **Save** to save changes.

The **Cover Page** displays modified values.

Affected Items tab of a PSR

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

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



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

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

The **Affected Items** table lists and describes the following fields by default.

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

	manually.	ECO.
--	-----------	------

Note The Item Number field indicates the  Ascending or  Descending order of the table, depending on the sort order you choose in the **Personalize** menu.

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

Attributes of the Affected Items tab of an NCR

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





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

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

Adding Items to the Affected Items tab of a PSR

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

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

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

To create Items:

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

The **Item** appears on the **Affected Items** table.

To search for existing Items:

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



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

To Type in Known Numbers:




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

Note If you click the **Add** button once without selecting an option from the list, the **Type-in Known Numbers** dialog appears.



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

1. Open the **PSR** and click the **Affected Items** tab.
2. Click **Add** in the **Affected Items** tab.
 - Click the **Search to add**  button to launch the palette and search for existing items.
 - Click the **Create to add**  button to create new **Items**.
 - Select an **Item** from the **Recently Visited** folder, drag and drop it in the **Affected Items** table.
 - Copy an **Item** existing on one **PSR** and paste it in the **Affected Item's** table of another **PSR**.

To search for existing items:

1. Click the **Search to add**  button to launch the search palette. You can also use the combination keys **Ctrl + I** to launch the search field.
2. Enter the value or * to search for and click the **Execute a Quick Search**  button.
3. Select an **Item** from the list that appears. To move it to the **Affected Items** table, you can either:
 - Drag and drop it.
 - Double-click the object.
 - Press Enter.
4. Click the **Close**  button to close the palette.
The **Item** appears on the **Affected Items** table.

To create items:

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


To copy and paste objects:

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

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

Removing an Item from the Affected Items tab

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

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

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

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


3. Click **Remove**.

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

Editing Items on the Affected Items tab

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

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

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

For more details on the fields see, the [Affected Items tab of a PSR](#) on page 26.

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

For example, you can update, manually the Rev Fixed field in the following cases:

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

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

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

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

Related PSR tab

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



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

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

The **Related PSR** tab lists and describes the following columns by default:

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

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




Note The Event field indicates the  Ascending or  Descending order of the table, depending on the sort order you choose in the **Personalize** menu.

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


Adding Related PSRs to the Parent PSR

To add Related PSRs to the Parent PSR in Java Client:

1. Open a PSR and click the **Related PSR** tab.

2. Click  and choose one of the following options.
 - The **Create**  button allows you to create objects.
 - The **Search**  button allows you to search for existing objects.

To create objects:

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

The object appears on the **Related PSRs** table.



To search for one or more existing objects:

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



The object appears on the **Related PSRs** table.


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

To add Related PSRs to the Parent PSR in Web Client:



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

To search for existing objects:

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

- Press Enter.
4. Click the **Close**  button to close the palette.
The object appears on the **Related PSR** table.


To create new objects:

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

Editing Items on the Related PSRs tab

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

To edit Related PSRs in Java Client:

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

To edit Related PSRs in Web Client:

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

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

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


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

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

Removing Related PSRs

To remove Related PSRs in Java Client:

1. Open a **PSR** and click the **Related PSR** tab.

2. Select the **PSR** you want to remove.
3. Click the **Remove**  button.
A dialog prompts you to remove the related **PSR** after confirmation.

To remove Related PSRs in Web Client:

1. Open a **PSR** and click the **Related PSR** tab.
2. Select the **PSR** you want to remove.
3. Click **Remove**.
A message bar displays the number of rows removed from the table.

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

Relationships tab

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

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

Relationships - Table

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

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

In the Relationship with a Rule column:

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

No – Indicates that it does not support the functionality.

In the Event/Result column:

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

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

Agile Base Class	Agile Classes	Event/ Result	Relationship with a Rule	References- Relationship with no rule	Lifecycle under Change Control
Changes	Change Orders	Workflow	Exists	Exists	NA
	Change Requests	Workflow	Exists	Exists	NA
	Deviations	Workflow	Exists	Exists	NA
	Manufacturers Orders	Workflow	Exists	Exists	NA
	Price Change Orders	Workflow	Exists	Exists	NA
	Site Change Orders	Workflow	Exists	Exists	NA
	Stop Ship	Workflow	Exists	Exists	NA
Customers	Customers	Lifecycle	Yes	Exists	No
Declarations	Homogeneous Material Declaration	Workflow	Exists	Exists	NA
	IPC 1752-1 Declarations	Workflow	Exists	Exists	NA
	IPC 1752-2 Declarations	Workflow	Exists	Exists	NA
	JGP SSI Declarations	Workflow	Exists	Exists	NA
	Part Declarations	Workflow	Exists	Exists	NA
	Substance Declarations	Workflow	Exists	Exists	NA
	Supplier Declaration of Conformance	Workflow	Exists	Exists	NA
File Folders	File Folder	Lifecycle	Yes	Exists	No
Items	Documents	Lifecycle	Yes	Yes	NA

	Parts	Lifecycle	Yes	Yes	NA
Manufacturer Parts	Manufacturer Parts	Lifecycle	Yes	Yes	NA
Manufacturer	Manufacturer	Lifecycle	Yes	Yes	No
Packages	Packages	Workflow	Yes	Yes	
Part Groups	Part Groups	Lifecycle	Yes	Yes	No
Prices	Published Process	Lifecycle	Yes	Yes	Yes
	Quote Histories	Lifecycle	Yes	Exists	Yes
PSRs	Non Conformance Reports	Workflow	Exists	Exists	NA
	Problem Reports	Workflow	Exists	Exists	NA
Programs	Activities	Workflow	Exists	Exists	NA
	Gate	Workflow	Exists	Exists	NA
QCRs	Audit	Workflow	Exists	Exists	NA
	CAPA	Workflow	Exists	Exists	NA
Requests for Quotes	Requests for Quotes	Lifecycle	Yes	Yes	No
RFQ Response	RFQ Response	Lifecycle	Yes	Yes	No
Sites	Sites	Lifecycle	Yes	Yes	No
Sourcing Projects	Sourcing Projects	Lifecycle	Yes	Yes	No
Specifications	Specifications	Lifecycle	Yes	Yes	No
Substances	Materials	Lifecycle	Yes	Yes	No
	Sub Parts	Lifecycle	Yes	Yes	No
	Substances	Lifecycle	Yes	Yes	No

Suppliers	Suppliers	Lifecycle	Yes	Yes	No
Transfer orders	Automated Transfer Orders	Workflow	Yes	Yes	NA
	Content Transfer Orders	Workflow	Yes	Yes	NA
User Groups	User Groups	None	No	Yes	NA
Users	Users	Status Attribute	No	Yes	NA
Action Items	Action Items	Status Attribute	No	No	NA
Discussions	Discussions	None	No	Yes	NA
Reports	Custom Reports	None	No	No	NA
	External Reports	None	No	No	NA
	Standard Reports	None	No	No	NA

Relationships in PQM

This is some additional information about relationships as they are used in the PQM solution:

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

- When a QCR affects the PSR, that is, when a QCR and PSR are related and the relationship rule follows the format:
 When *<QCR source object>* is *<event>*, set *<PSR target object>* to *<result>*
 all items from the PSR **Affected Items** tab are displayed on the PSR Items table of the QCR. If the PSR was used to aggregate multiple PSRs, then the related PSRs' affected items are displayed.
- When this QCR is affected by a PSR, that is, when the QCR and the PSR are related and the rule follows the format:
 When *<PSR source object>* is *<event>*, set *<QCR target object>* to *<result>*.
 all items from the PSR **Affected Items** tab and the related PSR's affected items are *not* displayed on the PSR Items table of the QCR.

Attributes of a Relationship

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

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

For details, see the 'Relationships' chapter in the *Getting Started with Agile PLM* guide.

Relationships tab Tools

The **Relationships** tab has the following buttons:



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



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

See also: [Relationships Table](#) on page 39. For details on **Views**, see the chapter 'Navigating in the Agile Web Client' in the *Getting Started with Agile PLM* guide.

Relationships Table

The Relationships table lists the following columns by default:

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




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

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


Adding Objects to the Relationship tab of a PSR

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

To add objects to the Relationships table in Java Client:

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

To create objects:

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

4. Click **OK**.

The object appears on the **Relationships** tab.




To search for existing objects:

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

5. Click **OK**.

The selected object appears on the **Relationships** table.

To add a relationship or reference to an object in Web Client:


1. Go to the **Relationships** tab of the object.
2. Use one of these options to add a row to the Relationships table:
3. Click the **Add** menu button and choose one of the following options:
 - Choose **By Search** to open the search palette. Execute a quick search to find the objects you want. Double-click to add an object. Press Escape to close the palette.
 - Choose **By Create** to create a new object. Select an object type, fill in any required fields, and then click **Add**. The newly created object is added to the table.
4. Drag and Drop
 - Select an object in the left navigation pane. Drag it onto the table and drop it. You can drag and drop from your  **My Bookmarks**,  **Recently Visited** list, and the  **NAVIGATOR** drawer.
5. Copy and Paste
 - Copy one or more objects from a table: search results table, BOM table, Where Used table, and so forth. Use **More > Copy** or Ctrl-C to copy the rows.
 - Open the object to which you want to add a relationship. Click the Relationships tab to display it. Paste the rows by using **More > Paste** or Ctrl-V.

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

Editing the Relationships table

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

To edit the Relationships table in Java Client:

1. Open a **PSR** and click the **Relationships** tab.
2. Select the row you want to edit.
3. Click the **Edit Relationship**  button.
4. Modify required fields.
5. Click **OK**.

The modified values appear on the table.

To edit the Relationships table in Web Client:


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

The modified values appear on the table.

Removing Relationships

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

To remove Relationship in Java Client:

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

The object does not appear on the **Relationships** table.

To remove Relationship in Web Client:

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

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

Relationship Rules

The **Relationship** rule specifies how the workflow you define for an object affects the workflow status of another object. For example, When PR0048 is **Submitted**, Set PR00049 to **Review**.

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

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

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

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

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

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

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

same.

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

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

Adding Relationship Rules


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

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

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

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

To add a Relationship rule in Java Client:

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

For example:

When PR0002 is Review

Set PR123304 to Submitted.

5. Click **OK**.

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

To add a Relationship Rule in Web Client:

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

For example,

When Problem Report PR000142 is Review

Set Problem Report PR00144 to Submitted.

6. Click **Save**.

The rule appears on the message bar.

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


Alternately, you can use the **Edit Rule** button to add a rule.

The rule appears in the **Relationships** table of the corresponding object.

Editing Relationship Rules


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

To edit the Relationship rule in the Java Client:

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

The modified rule displays on the **Relationships** table.


To edit the Relationship rule in the Web Client:

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

Removing Relationship Rules

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

To remove the relationship rule in Java Client:

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

The rule does not appear in the **Rule** column.

To remove the relationship rule in Web Client:

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

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

The rule does not appear in the **Rule** column.

Filter

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

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

All Relationships

This filter allows you to filter all the relationship objects in the table.

Complete


This filter allows you to filter all the objects for which the rule criteria are met.

Pending

This filter allows you to filter objects for which the rule criteria are not met.

Rule not specified

This filter allows you to filter objects for which there are no rules specified.

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

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

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

Additional attributes listed below help filter relationships further.

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

For details on **Views** and **Personalize** menus, see the *Getting Started with Agile PLM* guide.

Workflow tab of a PSR

An Agile PLM workflow is a sequence of statuses that a routable object goes through in the quality control process. The **Workflow** tab displays a flowchart of the workflow you select on the Cover

page.

The **Workflow** tab page displays two sections:

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

Workflow statuses are represented by different colors:

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

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

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

The **Personalize** menu enables you to create and customize **Views**. Use the personalize menu to create and save several views by defining filter conditions, and sort orders. You can later choose the required view from the list of available views. The **Add Reviewers / Remove Reviewers** buttons allow you to add/remove Approvers and Observers.

For details, see the 'Routing Objects with Workflows' chapter in the *Getting Started with Agile PLM* guide.

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



Submitting and Routing PSRs

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

For details, see the 'Routing Objects with Workflows' chapter in the *Getting Started with Agile PLM* guide.

Attachments tab of a PSR

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

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

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


Attachments tab actions allow you to add, delete, open, view, print, or get a copy of the attachment file. You can also check in and check out attachments (although you are actually checking file folder objects in and out).

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

Also see 'Working with Attachments' chapter in the *Getting Started with Agile PLM* guide.

Adding Attachment Files to a PSR

To add an Attachment file to a PSR in Java Client:

1. Open a **PSR** and click the **Attachments** tab.
2. Click the **Add Files**  button.
3. In the File Uploader dialog, click the **Browse for Files** button.
4. Select and double-click the file you want to add.
5. Click the **Options** arrow.
6. Select the **Type** of file from the list.
7. Check the following options as required:
 - Unzip all zipped files upon upload.
 - Add all files to a single File Folder.
 - Edit rows after adding.
8. Click **Upload**.
At the prompt, delete uploaded files from your local disk.
The file appears on the **Attachments** table.

To add an Attachment file to a PSR in Web Client:


1. Open a **PSR** and click the **Attachments** tab.
2. Select **Files / URLs / By Search** from the list on the **Add** button.
3. Choose **Add Files**. Before the **Add Files** dialog appears, a **File Upload and Download Method** dialog opens.
 - Select **Use standard browser capabilities / Use Java Upload / Download tool**.
 - Click **OK**.

- Use the **Browse** button to locate files in the **Add Files** dialog.
- A file folder containing the attached files is created. To add selected files in one file folder, select the **Add all files to a single file folder** check box, or else a file folder is created for each file selected.
- Click **Add**.

The file name and file folder objects appear in the **Attachments** table.

4. Choose **URLs**. The **Add URLs** dialog appears.
 - To add selected URLs in a single file folder, select the **Add all URL's to a single file folder checkbox** or else a separate file folder will be created for each URL.
 - Click **Add**.

The URLs and the file folder objects appear in the **Attachments** table.

5. Choose **By Search**. The **Add Files** dialog appears.
 - In the **Add Files** palette, enter '*' wildcard and search for files or URLs. You can also choose the latest version of the files.
 - To move the selected file to the **Attachments** table, you can either:
 - Drag and drop it
 - Double-click the file
 - Select the file and press Enter
 - Enter the **URL** address. Alternately, you can also copy and paste an **URL**.
 - A table at the base displays the selected objects and corresponding files attached.
 - Click the **Close**  button or hit the **Esc** button to close the palette.

The file / URL and the file folder objects appear in the **Attachments** table.

Removing Attachment Files from a PSR

To remove Attachment Files from a PSR in Java Client:

1. Open a **PSR** and click the **Attachments** tab.
2. Select the **File / URL** you want to remove.
3. Click the **Remove**  button.

The **File / URL** no longer appears on the **Attachments** tab.

To remove Attachment Files from a PSR in Web Client:

1. Open a **PSR** and click the **Attachments** tab.
2. Select the file or URL you want to remove.
3. Click the **Remove** button.

The **File / URL** does not appear on the **Attachments** table. A message bar displays the number of rows removed.

Working with Quality Change Requests

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

This chapter includes the following topics:



- [Creating Quality Change Requests](#) on page 49
- [Cover Page tab of a QCR](#) on page 52
- [Affected Items tab of a QCR](#) on page 55
- [Relationships tab of a QCR](#) on page 57
- [Workflow tab of a QCR](#) on page 57
- [Attachments tab of a QCR](#) on page 59
- [Submitting and Routing a QCR](#) on page 59

Creating QCRs

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


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

To create a QCR in Java Client:

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

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

To create a QCR in Web Client:

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

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

If you do not assign a workflow to the **QCR**, the **QCR** displays the **Unassigned** status.

To assign a workflow to the QCR:

1. Open a **QCR** and click the **Edit** button.
2. Select a workflow from the **Workflow** list. For details, see Workflow tab of a **QCR**.
3. Click **Save**.

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

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


Creating a QCR using Save As

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


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

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

To create a QCR using Save As in Java Client:

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

To create a QCR using Save As in Web Client:

1. Open the **QCR** you want to use as the basis for the new **QCR**.
2. Click the **Actions** drop-down menu.
3. Select **Save As**.
4. In the **Save As** dialog that appears, select Audit or CAPA from the **Type** list.
5. In the **QCR Number** field, accept the default number, enter a number, or click the **Autonumber**  button to generate a number.
6. Click **Save**.
7. The **QCR** opens displaying the **Cover Page** in edit mode. Modify required fields.

8. Click **Save** to save the changes.
9. The **QCR** appears displaying the Cover Page.

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

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


Creating a QCR from an Item

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

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


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

To create a QCR from an Item in Java Client:

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

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

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

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



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

The QCRs you create remain in the system until you delete them. Deleting QCRs does not remove them from Agile database. To delete a QCR permanently from the system you need to hard-delete them. For details on deleting QCRs, see [Deleting Agile Objects](#) on page 69.

Creating a QCR from a PSR


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

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

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

The **QCR** opens in the edit mode.

To create a QCR from a PSR in Web Client:

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

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

Cover Page tab of a QCR

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

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

	a default	bytes, including spaces and carriage returns (which count as two bytes).
Customer	Manually.	The Customer associated with the QCR.
Supplier	Manually	The list of Suppliers associated with the QCR. For example, Suppliers can initiate a SCAR if they need to resolve issues in the process, products or other areas.
Workflow	Usually selected manually. If you do not assign a Workflow to a QCR it remains in the Unassigned state. You are prompted to select a Workflow, if you move the QCR to the next status without assigning a Workflow. You can change the workflow selection as long as the QCR is in the Pending status type.	The name of the workflow used to move this QCR through the quality control process.
Quality Administrator	Select from a list. In the list, Departments appear first, followed by individual user names.	The default Quality Administrator. Note: If you prefer another QA over default QA, the system displays a message "Quality Administrator selected is not one of the defaults. The default Quality Administrator list includes: Default QA UserName (Userid), " If you define the workflow to notify the default quality administrator, the user groups or user in this field receives notifications about the QCR. If this field is blank, then the system sends notifications to every quality administrator on the list. If the notification definition in the workflow is blank, the system does not send notifications.
Status	Automatically, when created. Updates as the QCR moves through the assigned workflows.	Workflow status. If you do not select a workflow this field displays the Unassigned status.
Originator	Usually automatically, when created (with the default set by the Agile PLM Administrator).	The originator or creator of the QCR.
Date Originated	Usually automatically, when created.	The date you create the QCR
Date Submitted	Automatically generated based on workflow status.	The date when the QCR moves to the Submitted status in the workflow.

Date Released	Automatically generated based on workflow status.	The date when the QCR moves to the first released status in the workflow.
Final Complete Date	Automatically when the QCR enters the Complete type status.	The date the QCR moves to the Complete status type.
Preventive Action	Usually manually; can contain a default. Maximum number of bytes is set by the Agile PLM administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).	A pro-active action taken to prevent the problem from happening again. Applies only to CAPAs.
Root Cause Analysis	Manually Maximum number of bytes is set by the Agile PLM administrator; can be up to 4000 bytes, including spaces and carriage returns (which count as two bytes).	The root cause of the problem. Applies only to CAPAs.
Planned Audit Date	Manually. This field is visible on setting the following prerequisite. Note In Java Client, click Admin tab. Navigate to Data Settings > Classes > Quality Change Requests > Audits > Cover Page > Planned Audit Date. Note Set Planned Audit Date to Visible. Ensure you hold read/modify privileges for Planned Audit Date attributes.	Date planned to audit the problem.
Audit Result	Usually manually, can contain a default. For example, when you implement a CAPA, the Quality Analyst performs an Audit to ensure the CAPA actually solves the problem. If the fix for the problem is validated, then the result is pass. Otherwise it fails, and the Quality Analyst updates the Audit Result field.	Audit process result. The default setting for the audit result is Pass/Fail. For more details, on other settings contact the Agile Administrator.

Product Line(s)	Usually manually; can contain a default.	List of product lines defined by the Agile Administrator.
------------------------	--	---

Updating the Cover Page of a QCR

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

To update the Cover Page of a QCR (Java Client and Web Client):

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

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

The **Cover Page** displays updates of the **QCR**.

Affected Items tab of a QCR

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

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

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

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



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

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

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

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

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

Note The Item Number field indicates the  Ascending or  Descending order of the table, depending on the sort order you choose in the **Personalize** menu.

Relationships tab of a QCR

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

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

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

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

The **Relationships** tab of a **QCR** is similar to that of a **PSR**. See also: [Relationships tab](#) on page 35.

For details, see the *Getting Started with Agile PLM* guide.

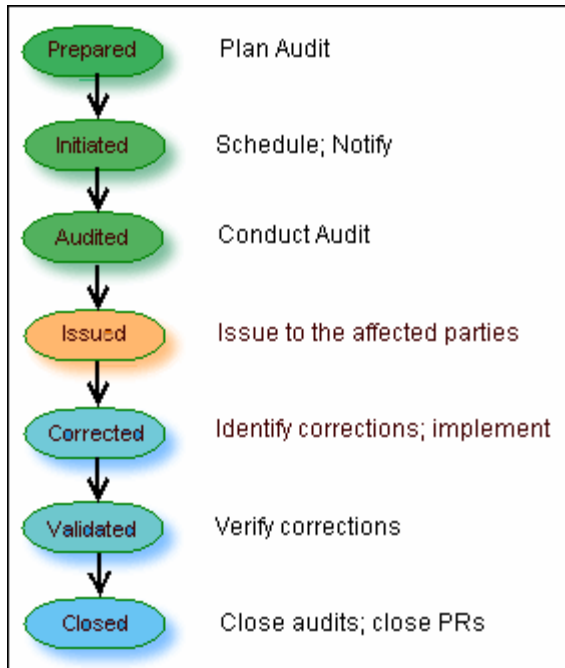
Workflow tab of a QCR

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

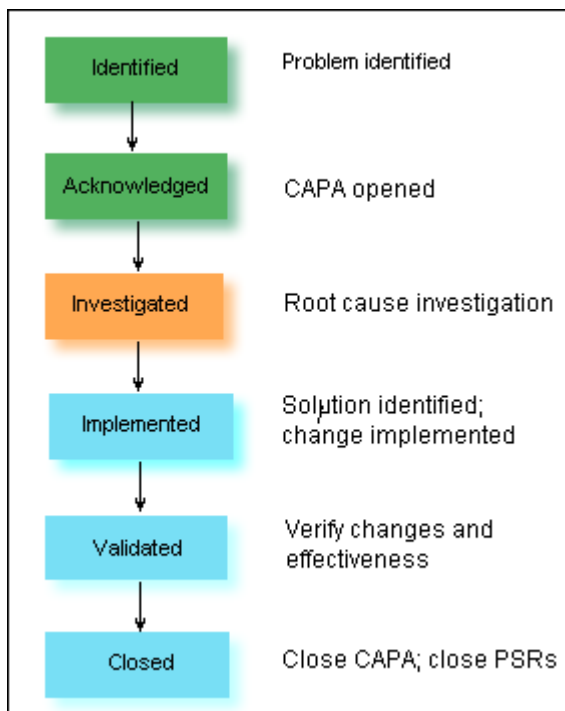
The **Workflow** tab page includes the **Views** and **Personalize** buttons. For details on **Views** and **Personalize** menus, see the *Getting Started with Agile PLM* guide.

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

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



The table below represents the status of a default CAPA.



For details, see the 'Routing objects with Workflows' chapter in the *Getting Started with Agile PLM*

guide.

Submitting and Routing a QCR

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

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

Attachments tab of a QCR

You can reference files and attachments from the **Attachments** tab of a **QCR**. The **Attachments** tab of a **QCR** is similar to that of the **PSR**. For details, see [Attachments tab of a PSR](#) on page 47.

Managing Product Service Requests

This chapter includes the following:

▪ Approving or Rejecting a Product Service Request.....	61
▪ Closing a PSR	62
▪ Actions menu in PSR.....	62
▪ Audit Status of a PSR.....	62
▪ Audit Release of a PSR.....	63

This chapter includes the following topics:

- [Approving/Rejecting a Product Service Request](#) on page 61
- [Closing a PSR](#) on page 62
- [Actions Menu in a PSR](#) on page 62
- [Audit status of a PSR](#) on page 62
- [Audit Release of a PSR](#) on page 63

Approving or Rejecting a Product Service Request

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

To approve a PSR:

1. Open a **PSR**. (Ensure that it is in the **Review** or **Released** status).
2. Click the **Approve** button above the tabs. The Approve to Review dialog appears.
3. Notice that the User field is pre-populated.
4. Enter **Password** as the User specified. This field is mandatory.
5. Select the **Quality Analyst** and **Originator** you want to notify.
6. Use the palette to add **Reviewers**.
7. Add **Comments**, if any.
8. Select the **Send notification as urgent** check box to mark the notification sent out because of this action as "Urgent".
9. Click **Approve**.
10. Click **Finish**.

To reject a PSR:

1. Open a **PSR**. (Ensure that it is in the **Review** or **Released** status).
2. Click the **Reject** button located above the tabs. The Reject for Review dialog appears.
3. Enter **Password** to enter as the User specified. This field is mandatory.
4. Select the **Quality Analyst** and the **Originator** you want to notify.

5. Use the palette to add **Reviewers**.
6. Add **Comments**, if any.
7. Select the **Send notification as urgent** check box to mark the notification sent out as a result of this action as "Urgent".
8. Click the **Reject** button.
9. Click **Finish**.

Closing a PSR

To close a PSR (promote a PSR to the Complete status):

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

Actions menu in PSR

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

Bookmark: Saves the **PSR** as a Bookmark for future retrieval.

Subscribe: Subscriptions notify you of changes on tables or of attributes on the objects.

Save As: Creates and saves a copy of the current **PSR** in the same or a different subclass.

Delete: Deletes the **PSR**.

Send: Sends the **PSR** to other Users who have the necessary Roles and Privileges. An option to send the notification as urgent is available.

Sharing: Allows Users to grant other users privilege access equivalent to his.

Copy URL to Clipboard: Copies the URL of the object to the clipboard, so that you can paste it elsewhere.

Audit Status: Audits the status of an object to check if the workflow can progress further.

Audit Release: Audits if you can release the object with the existing workflow status.

View Workflows: Allows you to view the workflow states of the **PSR**.

Print: Prints the **PSR**.

Export: Exports the **PSR** to a delimited text file (CSV), a Microsoft Excel Notebook, or an XML file.

Create Quality Change Requests: Allows you to create Quality Change Requests on the **PSR**.

Audit Status of a PSR

Audits the status of a **PSR**, to check if the workflow can move to the next state. It is performed automatically when the workflow of the **PSR** has to autopromote to the next state.

To audit the status of a PSR in Java Client:

1. Open a **PSR** you need to audit.
2. Click the **Audit** button at the top or right-click in the window; choose **Audit Status** from the menu that appears.

3. The Audit Results for Audit Status dialog box appears. Correct errors, if any.
4. Click **OK**.

To audit the status of a PSR in Web Client:

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

Audit Release of a PSR

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

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

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

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

- **For the Pending, Review, Released, and Complete status:**

Required fields for the current status level. (Your Agile Administrator determines the required fields in the workflow property settings.)

- **For the Review status:**

Checks approval of all Approvers.

- **For the Released status:**

Checks all the current release audit rules.

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

To audit the PSR for release in Java Client:

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

To audit the PSR for release in Web Client:

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

Chapter 5

Managing QCRs

This chapter includes the following:

▪ Approving or Rejecting Quality Change Requests	65
▪ Closing a QCR.....	66
▪ Actions Menu in a QCR	66

This chapter includes the following topics:

- [Approving/Rejecting Quality Change Requests](#) on page 65
- [Closing a QCR](#) on page 66
- [Actions Menu in a QCR](#) on page 66
- [Change Order in a QCR](#) on page 66

Approving or Rejecting Quality Change Requests

If the **QCR** specifies you as an Approver, then you have to verify the audit or corrective action for a specific item. For details, see the *Getting Started with Agile PLM* guide.

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

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

To approve a QCR in the Web Client:

1. Open the **QCR** you want to approve.
2. Click the **Approve** button. The Approve wizard appears.
3. In the **Password** field, enter your password.
4. Select the check boxes to notify the **Originator**, **Quality Analyst**, and **Reviewers**.
5. You can also notify users or user groups that you have approved the **QCR**.
6. Click the **Search** palette and select the users you want to notify.
7. In the **Comments** field, enter approver comments. Comments are not mandatory. To enable **Comments**, you need to set **Comments for Rejection** to **Allow** in the Java Client.
For details, see the 'Workflow' chapter in the *Agile PLM Administrator* guide.
8. Click **Approve**.

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

To reject a QCR in the Web Client:

1. Open the **QCR** you want to reject.
2. Click the **Reject** button. The Reject wizard appears.

3. In the **Password** field, enter your password.
4. Select the check boxes to notify the **Originator**, **Quality Analyst**, and **Reviewers**.
5. Click the **Search** palette to select users you want to notify.
6. In the **Comments** field, enter Approver comments. Comments are not mandatory. You need to set **Comments for Rejection** to **Allow** in the Java Client.
For details, see the 'Workflow' chapter in the *Agile PLM Administrator* guide.
7. Click the **Reject** button.

Closing a QCR

To close a QCR (promote a QCR to the Complete status):

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

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

Actions Menu in a QCR

The **Actions Menu** lists actions that you can perform on the **QCR**.

Bookmark: Saves the **QCR** as a Bookmark for future retrieval.

Subscribe: Subscriptions notify you of changes on tables or of attributes on the objects.

Save As: Creates and saves a copy of the current object in the same or different subclass.

Delete: Deletes the **QCR**.

Copy URL to Clipboard: Copies the URL of the object to the clipboard, so that you can paste it elsewhere.

Audit Status: Audits the status of an object to check if the workflow can progress further.

Audit Release: Audits if you can release the object with the existing workflow status.

Print: Prints the **QCR**.

Export: Exports the **QCR** to a delimited text file (CSV), Microsoft Excel Workbook or to an XML file.

Send: Sends the **QCR** to other Users who have the necessary Roles and Privileges. An option to send the notification as urgent is available.

Sharing: Allows Users to grant other users privilege access equivalent to his.


Create Change: Allows you to create a Change directly from the **QCR**.

View Workflows: Allows you to view the workflow states of a **QCR**.

Change Order in a QCR


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

To create a Change from a QCR in Java Client:

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

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

To create a Change from a QCR in Web Client:

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

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

Deleting Agile Objects

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

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

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

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

Caution You *cannot* undelete a hard-deleted object.

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

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

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

Notes about Deleting PSR or QCR Objects

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

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

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

You *cannot* delete a PSR if:

- It appears on a QCR's **Relationships** tab.
- It is currently part of a corrective action process. Remove the PSR from the QCR and then delete the PSR.

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

You *cannot* delete a QCR if:

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


This section contains the following topics:

- [Soft-Deleting an Object](#) on page 70
- [Undeleting an Object](#) on page 70
- [Hard-Deleting an Object](#) on page 71

Soft-Deleting an Object

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

To soft-delete an object in Java Client:

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

The object is soft-deleted.

To soft-delete an object in Web Client:

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


The object is soft-deleted.

See also: Deleting Agile Objects, [Undeleting an Object](#) on page 70 , and [Hard-deleting an Object](#) on page 71.

Undeleting an Object


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

To undelete an object in Java Client:

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

To undelete an object in Web Client:

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


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

See also: Deleting Agile Objects, [Soft Deleting an Object](#) on page 70, and [Hard-deleting an Object](#) on page 71.

Hard-Deleting an Object


Soft-deleted objects still exist in the database. To remove an object permanently, you must hard-delete it. While an object is still only soft-deleted, you can undelete it. Run the appropriate Deleted *object* search from the **Recycle Bin Searches** folder.

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

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

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

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

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

See also: Deleting Agile Objects, [Undeleting an Object](#) on page 70, and [Soft Deleting an Object](#) on page 70.

