

**Oracle® Agile Product Lifecycle Management for  
Process**

eQuestionnaire User Guide

Release 6.1

**E17150-02**

January 2012

Copyright © 1995, 2012, Oracle and/or its affiliates. All rights reserved.

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

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

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

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

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

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

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

---

---

# Contents

<b>Preface</b> .....	v
Audience .....	v
Variability of Installations .....	v
Documentation Accessibility .....	vi
Related Documents .....	vi
Conventions .....	vii
 <b>1 Introducing eQuestionnaire</b>	
<b>Overview</b> .....	1-1
<b>Getting Started with eQuestionnaire</b> .....	1-2
Accessing eQuestionnaire .....	1-2
Defining Access to Questionnaires .....	1-3
 <b>2 Working with Questionnaires</b>	
<b>Action Items</b> .....	2-1
Action Items Table .....	2-2
Viewing a Questionnaire .....	2-2
<b>Creating a Questionnaire</b> .....	2-3
Summary Information Section .....	2-3
Importing a Specification .....	2-5
Contact Information Section .....	2-6
Edit Questionnaire Section .....	2-7
Attributes .....	2-7
Supplier Ingredient # .....	2-8
Supplier Created %Breakdown .....	2-8
%Breakdowns on the Specification .....	2-8
Shelf Life .....	2-8
Compliance .....	2-8
Allergens, Intolerances, Additives .....	2-8
Analytical Properties .....	2-8
Extended Attributes .....	2-8
Nutrient Properties .....	2-9
Environmental Waste .....	2-9
Supporting Documents .....	2-9
DRL .....	2-9

Comments .....	2-9
Custom Sections .....	2-9
Saving a Questionnaire .....	2-10
Sending a Questionnaire to a Supplier .....	2-10
Creating a Copy of a Questionnaire .....	2-10
<b>Receiving a Questionnaire - Supplier</b> .....	2-11
Logging in to Supplier Portal .....	2-11
Completing a Questionnaire .....	2-11
Saving a Questionnaire .....	2-11
Returning a Questionnaire.....	2-11
<b>Creating Supplier-Initiated Questionnaires</b> .....	2-12
Creating a Questionnaire Template.....	2-12
Naming Your Supplier-Initiated Template .....	2-12
Saving Your Supplier-Initiated Template .....	2-13
<b>Processing a Completed Questionnaire</b> .....	2-14
Reviewing a Questionnaire.....	2-14
Changing Ownership and Access Rights .....	2-14
Exporting a Questionnaire to GSM .....	2-14
Selecting an Import Target .....	2-14
Importing a Trade Specification .....	2-15
Exporting Data to GSM.....	2-16
Returning a Questionnaire to a Supplier .....	2-17
Searching for Questionnaires .....	2-17

---

---

# Preface

The *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* explains how to use the eQuestionnaire (eQ) application extension to Global Specification Management (GSM). eQ provides the capability to electronically solicit, review, enrich, and leverage specification data from suppliers. You can create a questionnaire by importing data from an existing GSM specification or you can start with a blank one.

This Preface contains these topics:

- [Audience](#)
- [Variability of Installations](#)
- [Documentation Accessibility](#)
- [Related Documents](#)
- [Conventions](#)

## Audience

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

## Variability of Installations

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

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

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

### 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.

### Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

### TTY Access to Oracle Support Services

To reach AT&T Customer Assistants, dial 711 or 1.800.855.2880. An AT&T Customer Assistant will relay information between the customer and Oracle Support Services at 1.800.223.1711. Complete instructions for using the AT&T relay services are available at <http://www.consumer.att.com/relay/tty/standard2.html>. After the AT&T Customer Assistant contacts Oracle Support Services, an Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process.

## Related Documents

For more information, see the following documents in the Oracle Agile PLM for Process Release 6.1 documentation set:

- *Agile Product Lifecycle Management for Process Administrator User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process Getting Started Guide*
- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

<http://www.oracle.com/technetwork/documentation/agile-085940.html>

# Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.





---

# Introducing eQuestionnaire

This chapter provides an overview of Agile (PLM) for Process eQuestionnaire and includes the following topics:

- [Overview](#)
- [Getting Started with eQuestionnaire](#)

## Overview

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

Once you have created the questionnaire, you can send it to a supplier. Agile PLM for Process sends the supplier an email message containing a link to the questionnaire. The supplier can then access the questionnaire, supply the requested data, and submit the requested data to you. Suppliers can also initiate questionnaires in Supplier Portal.

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

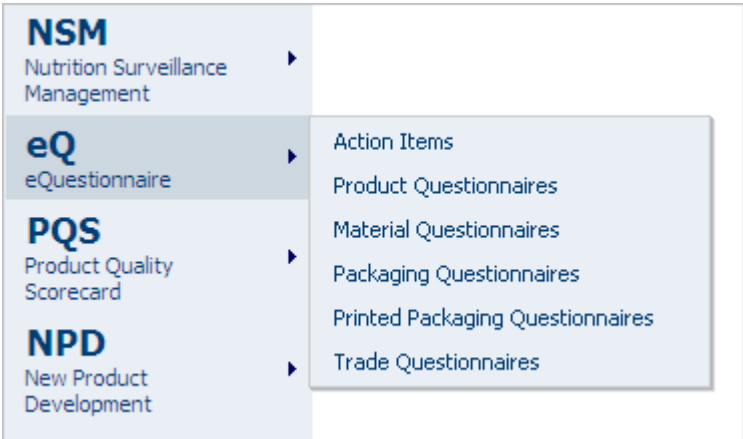
Agile PLM for Process saves every questionnaire; you can always retrieve one if needed, for auditing purposes.

# Getting Started with eQuestionnaire

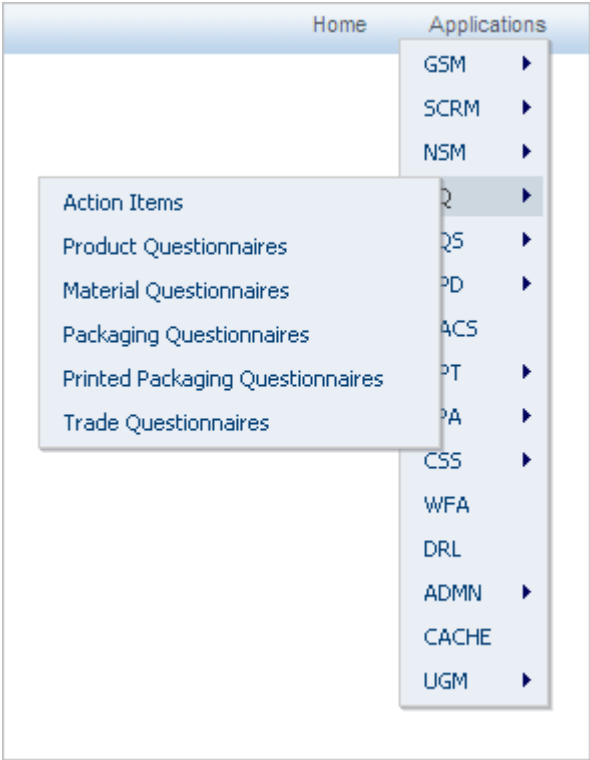
## Accessing eQuestionnaire

To access the eQuestionnaire application, click **eQ** from the left navigation panel as shown in [Figure 1-1](#), or select **eQ** from the Applications menu on the top menu bar, as shown in [Figure 1-2](#).

**Figure 1-1** *Selecting eQ from the application navigation*



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



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

## Defining Access to Questionnaires

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

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



## Working with Questionnaires

This chapter describes how to use eQuestionnaire (eQ) to solicit and integrate data provided by suppliers.

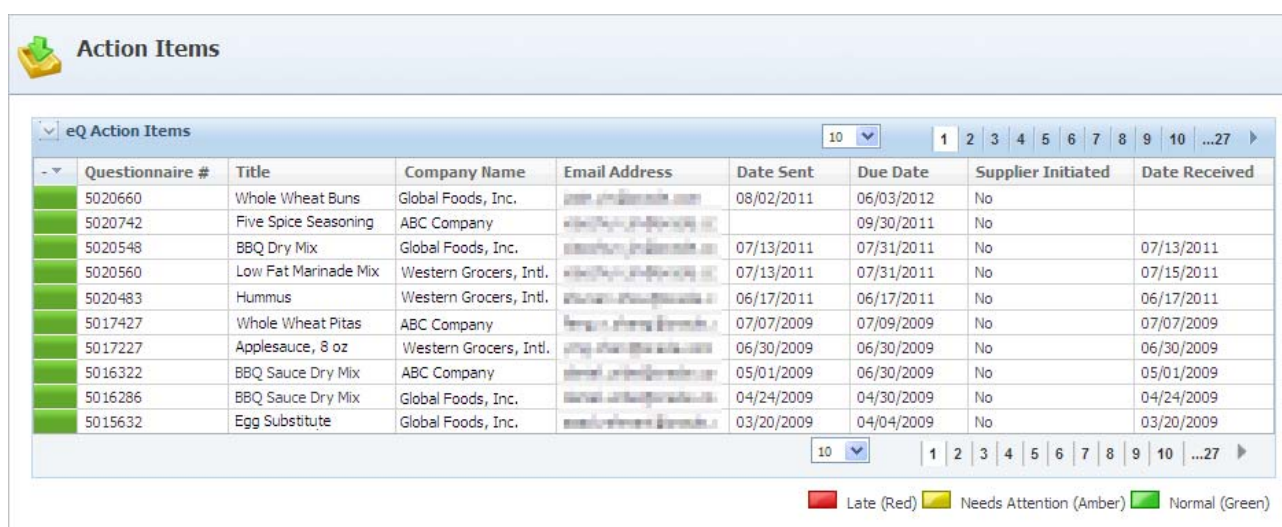
Topics in this chapter include:

- [Action Items](#)
- [Creating a Questionnaire](#)
- [Receiving a Questionnaire - Supplier](#)
- [Creating Supplier-Initiated Questionnaires](#)
- [Processing a Completed Questionnaire](#)

### Action Items

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

**Figure 2–1** Action Items page






Questionnaire #	Title	Company Name	Email Address	Date Sent	Due Date	Supplier Initiated	Date Received
5020660	Whole Wheat Buns	Global Foods, Inc.	joan.jordan@globalfoods.com	08/02/2011	06/03/2012	No	
5020742	Five Spice Seasoning	ABC Company	alice@abc.com		09/30/2011	No	
5020548	BBQ Dry Mix	Global Foods, Inc.	joan.jordan@globalfoods.com	07/13/2011	07/31/2011	No	07/13/2011
5020560	Low Fat Marinade Mix	Western Grocers, Intl.	alice@wgrocers.com	07/13/2011	07/31/2011	No	07/15/2011
5020483	Hummus	Western Grocers, Intl.	alice@wgrocers.com	06/17/2011	06/17/2011	No	06/17/2011
5017427	Whole Wheat Pitas	ABC Company	ben@abc.com	07/07/2009	07/09/2009	No	07/07/2009
5017227	Applesauce, 8 oz	Western Grocers, Intl.	alice@wgrocers.com	06/30/2009	06/30/2009	No	06/30/2009
5016322	BBQ Sauce Dry Mix	ABC Company	ben@abc.com	05/01/2009	06/30/2009	No	05/01/2009
5016286	BBQ Sauce Dry Mix	Global Foods, Inc.	joan.jordan@globalfoods.com	04/24/2009	04/30/2009	No	04/24/2009
5015632	Egg Substitute	Global Foods, Inc.	joan.jordan@globalfoods.com	03/20/2009	04/04/2009	No	03/20/2009


Legend: ■ Late (Red) ■ Needs Attention (Amber) ■ Normal (Green)


## Action Items Table


To sort rows by column, click any column head.

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

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

On August 14 or before, the symbol will be: 

On August 15, 16, and 17, the symbol will be: 

On August 18 or later, the symbol will be: 

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

- **Status** (not labeled)—This field displays a red, amber, or green status bar symbol indicating whether the due date was met. It is based on the current date, Due Date, and Amber Date:
  - **Red**—The Due Date has passed (Current Date has passed the Due Date).
  - **Amber**—The Due Date is approaching (Current Date plus the Amber Date is greater than or equal to the Due Date).
  - **Green**—Displays when the questionnaire was returned in the allotted time (Due Date met) or if the Due Date is still some days away (the current date plus the Amber Date is less than the Due Date).
- **Questionnaire #**—The number assigned to the questionnaire by the system. You can click the field link to view the questionnaire.
- **Title**—The title of the questionnaire.
- **Company Name**—The name of the company that sent the questionnaire.
- **Email Address**—The name of the person that initiated the questionnaire.
- **Date Sent**—The date the questionnaire was sent to the supplier.
- **Due Date**—The date on which the questionnaire must be returned from the supplier.
- **Supplier Initiated**—Indicates whether the questionnaire was initiated by a supplier ('Yes') or was created in eQ ('No'). This column is only available when the supplier initiated questionnaire option is configured on.
- **Date Received**—The date that the questionnaire was received from the supplier.


## Viewing a Questionnaire

You can view any questionnaire by clicking the corresponding row.

## Creating a Questionnaire

If you have the necessary user privileges, you can create a questionnaire by clicking **New > [Type] Questionnaire** from the action menu, where [Type] represents Product, Material, Packaging, Printed Packaging, or Trade.

Choices may vary depending on the configuration of your system. The content of the questionnaires varies by type and will be relevant only to the type that you choose.

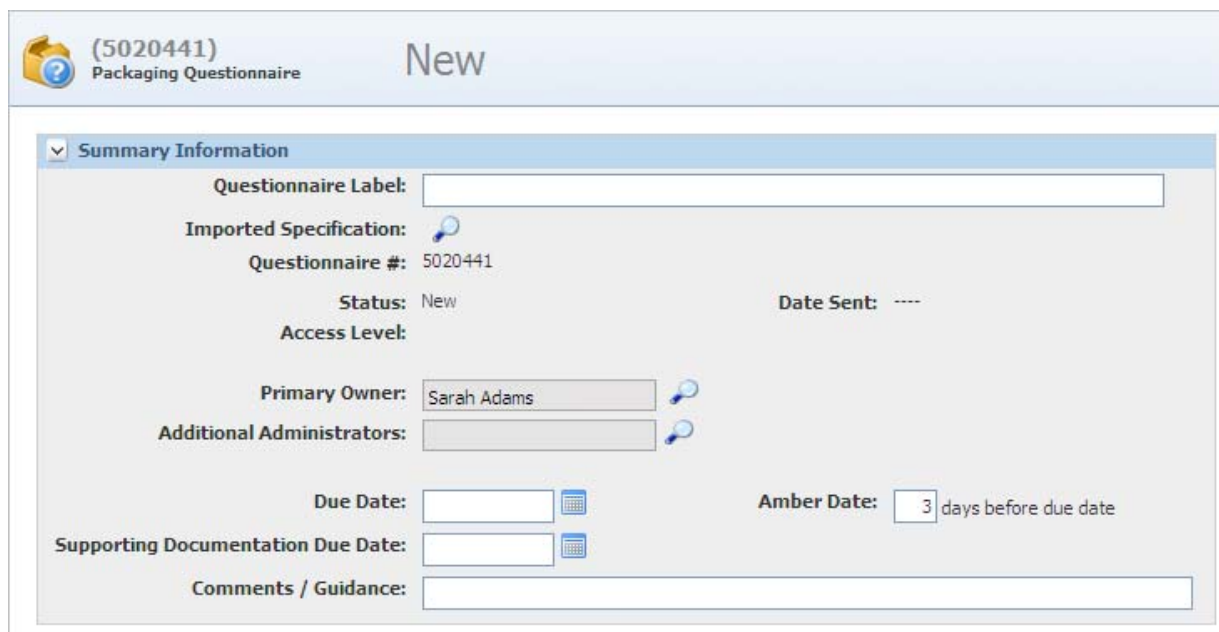
You can also create a questionnaire by clicking the create new icon () from the search page.

After you select the questionnaire type, eQ displays an empty questionnaire.

## Summary Information Section

Figure 2–2 shows the Summary Information section of a questionnaire.

**Figure 2–2** Summary Information section



The screenshot shows the 'New' form for a 'Packaging Questionnaire' with ID '(5020441)'. The 'Summary Information' section is expanded, showing the following fields:

- Questionnaire Label:** An empty text input field.
- Imported Specification:** A button with a magnifying glass icon.
- Questionnaire #:** 5020441
- Status:** New
- Date Sent:** ---
- Access Level:** (empty)
- Primary Owner:** Sarah Adams (with a magnifying glass icon)
- Additional Administrators:** (empty with a magnifying glass icon)
- Due Date:** (empty with a calendar icon)
- Amber Date:** 3 days before due date
- Supporting Documentation Due Date:** (empty with a calendar icon)
- Comments / Guidance:** A large text area.

Key fields include:

- **Questionnaire Label** — The name of the questionnaire. It can be the name of the imported specification or an open text field. This is a required field. Suppliers will see this as the title of their questionnaire. This name will appear in the email as well as the questionnaire. For supplier-initiated questionnaires, variables can be entered in this field. See ["Creating a Questionnaire Template"](#) on page 2-12 for more information.
- **Imported Specification** — For information on importing a specification, refer to ["Importing a Specification"](#) on page 2-5.
- **Questionnaire #** — An auto-generated ID. If this questionnaire is a supplier-initiated template, '-template' displays to the right of the questionnaire number.

- **Status** — System-defined status of the questionnaire.
  - **New** — The questionnaire has been created and saved, but not sent to the supplier.
  - **Sent** — The questionnaire has been sent to the supplier, but the supplier has not yet logged into eQ. While the eQ is in this status, the user can change the supplier contact info from Contact A to Contact B if needed.
  - **In Progress** — The questionnaire has been sent to the supplier and the supplier has logged into eQ. The contact information becomes locked once this occurs.
  - **Submitted** — The supplier has returned the questionnaire. The questionnaire is available to be imported into GSM.
- **Date Sent** — The date the questionnaire was sent to the supplier. "Supplier Initiated" appears to the right of the date if the questionnaire was initiated by the supplier.
- **Access Level** — Only relevant if Object Level Security (OLS) is enabled in the system. Only users assigned a certain role can change this field. When you import a specification, GSM copies the access level of the specification to this field. This access level controls which extended attributes and custom sections the eQ administrator can see once the questionnaire is returned from the supplier. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information on roles. The *Agile Product Lifecycle Management for Process Security Configuration Guide* contains detailed information on OLS.
- **Primary Owner** — Used to determine what questionnaires are visible on the Action Items page. To assign a different primary owner, click the search icon (🔍), search for the desired user, and select that user. Only one owner is allowed.

If eQ security is configured on, only the primary owner and those users defined in the Additional Administrators field have access to the questionnaire. If eQ security is configured off, all users with access to the eQuestionnaire application have access to the questionnaire. The user creating the questionnaire will be identified as the "primary owner". The "primary owner" can be changed by the owner or an additional administrator. The Action Items list is based on the primary owner.

- **Additional Administrators** — By default, the Additional Administrators field will be blank. To assign additional administrators, click the search icon (🔍), search for the desired users, and select those users. If eQ security is configured on, only the primary owner and those users defined in the Additional Administrators field have access to the questionnaire.
- **Due Date** — The date on which the questionnaire must be returned from the supplier. A date must be specified in order for a questionnaire to be sent. Click the calendar icon (📅) to select a date. This is a required field.
- **Amber Date** — Sets the number of days prior to the Due Date when this questionnaire becomes flagged as amber.
- **Supporting Documentation Due Date** — The date on which supporting documents must be returned from the supplier. Click the calendar icon (📅) to select a date.
- **Comments/Guidance** — Additional notes or instructions to the supplier.



### Importing a Specification

By default, questionnaires that are created are sent to the supplier blank. If you want the supplier to review data that exists on a specification, you can leverage that specification to create a questionnaire. To select a specification to import, click the search icon ( 🔍 ), as [Figure 2–3](#) shows.

**Figure 2–3** *Importing a specification's data*

**Summary Information**

Questionnaire Label:

Imported Specification: 🔍

Questionnaire #: 5020598

Status: New

A search page is displayed in which you can search and select the desired specification. Once you have selected the specification, data from the specification will display in the delivered questionnaire. In addition, the specification's name will populate the Questionnaire Label field, as [Figure 2–4](#) shows.

**Figure 2–4** *Imported specification populates questionnaire*

**Summary Information**

Questionnaire Label: Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9

Imported Specification: Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9 - 5077540-001 🔍 ✕

Questionnaire #: 5020598

Status: New

Access Level:

You can view the imported specification in a dialog box by clicking the linked specification name in the Imported Specification field. This will allow you to review the specification you selected. You can change the imported specification by selecting the search icon ( 🔍 ) again, or clear the imported specification by selecting the clear data field. Once cleared, the questionnaire will be sent without data.

## Contact Information Section

This section contains contact information for the supplier as well as your company, as Figure 2–5 shows.

**Figure 2–5** Contact Information section

This section consists of two areas:

**Supplier Contact** — This area is for the supplier’s contact information. This identifies who the questionnaire will be sent to. Required fields are: Contact Name and Email Address.


**Company (CPI) Contact** — This is the area to designate the questionnaire sender’s information. This information will default to the originator’s contact information, and will be the contact information provided to the supplier on the questionnaire. Required fields are: Company Name, Phone, Street Address, City, State/Province.

---

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

---

To fill out contact information, manually add the information, or:

1. Click the search icon (  ). A Company and Facility search dialog box displays.
2. Search and select a Company or Facility. eQ displays a list of all associated contacts.
3. Select a company or facility contact. The dialog box closes and eQ populates the contact information section with the information of that user.

## Edit Questionnaire Section

Use the Edit Questionnaire section to define which questions are required, optional, or not asked by the questionnaire. This is the section where you identify the specific information for the supplier to provide. [Figure 2–6](#) shows a portion of the Edit Questionnaire section of a material questionnaire.


**Figure 2–6** Packaging questionnaire, Edit Questionnaire section

▼ Packaging Attributes			
Attribute	Required	Optional	
Packaging Name and Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Supplier Packaging #	<input type="checkbox"/>	<input type="checkbox"/>	
Storage Requirements / Instructions	<input type="checkbox"/>	<input type="checkbox"/>	
Relative Humidity	<input type="checkbox"/>	<input type="checkbox"/>	


  

▼ Analytical Properties			
Attribute	Required	Optional	
<a href="#">Add New</a>			

▼ Extended Attributes			
Attribute	Required	Optional	
Base	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Add New</a>			

▼ Environmental Waste			
Attribute	Required	Optional	
GREEN GLASS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Add New</a>			

▼ Supporting Documents			
Attribute	Required	Optional	
<a href="#">Add New</a>			

### Attributes

Each questionnaire type contains an attributes section. Information listed here varies depending on the questionnaire type. By default, no attributes are selected. You must select either optional or required to include the specific attribute in the questionnaire. If neither is selected, the attribute will not be included in the questionnaire. If optional is selected, the attribute will be included in the questionnaire, but the supplier will not be required to provide the information. If required is selected, the supplier will be forced to fill the field out before they can submit the questionnaire.

All fields relate to the associated GSM specification type. There are a few exceptions:

**Supplier Ingredient #** This field is not available on a GSM specification. This is a field commonly used on an SCRM sourcing approval, as a supplier item #.

**Supplier Created %Breakdown** When this attribute is selected, a blank % breakdown is provided to the supplier. This attribute also allows the supplier to add multiple %breakdowns. When this attribute is marked as required, only one %breakdown is required.

When a specification is imported, if the specification contains the attribute, the attribute will be automatically checked as required.

The attribute sections are defined below:

**%Breakdowns on the Specification** This section only appears if you import a specification. If you import a specification with multiple breakdowns, all breakdowns marked with the "Publish to Supplier" tag will be listed. The breakdowns you select as optional or required will be included in the questionnaire.

**Shelf Life** This section lists the shelf life relevant to the specification.

**Compliance** This section lists the complies with data linked to the specification. The following header variables are included:

- **Compliance** — Enables the supplier to provide complies with data.
- **User Group Selection** — Enables the supplier to add new data elements that have not been explicitly requested. You limit the selection of data elements that a supplier can add by adding a data group to this table. Only the data elements assigned to that group will be available to the supplier to add.  
  
For example, if you want a North American supplier to add the compliance items that an ingredient complies with, you might add a group called "North America" to the "Compliance (User Group Selection)" table. The North America group would only contain the complies with items that pertain to the north american region.
- **free text** — Enables the supplier to enter free text to further define attributes.

**Allergens, Intolerances, Additives** This section lists allergens, intolerances, and additives linked to the specification. The following header variables are included:

- **known to contain** — Enables the supplier to provide "known to contain" data for allergens, intolerances, and additives linked to the specification.
- **does NOT contain** — Enables the supplier to confirm "does not contain" data for allergens, intolerances, and additives linked to the specification.
- **User Group Selection** — Enables the supplier to add new data elements that have not been explicitly requested. You limit the selection of data elements that a supplier can add by adding a data group to this table. Only the data elements assigned to that group will be available to the supplier to add.
- **free text** — Enables the supplier to enter free text to further define attributes.

**Analytical Properties** This section lists analytical properties for the specification.

**Extended Attributes** This section displays extended attributes for the specification. Extended attributes define important features and characteristics of the specification.

Certain roles are needed to add and delete extended attributes. See Appendix A of the *Agile Product Lifecycle Management for Process Administrator User Guide* for a listing of roles.

**Nutrient Properties** This section lists the nutrient data linked to the specifications. The following header variables are included:

- **User Group Selection** — Enables the supplier to add new data elements that have not been explicitly requested. You limit the selection of data elements that a supplier can add by adding a data group to this table. Only the data elements assigned to that group will be available to the supplier to add.

**Environmental Waste** This section lists known waste materials for this specification.

**Supporting Documents** This section lists supporting documents for the specification.

**DRL** This section lists DRL (Document Reference Library) documents linked to the specification.

**Comments** This section allows the supplier to provide comments.

**Custom Sections** This section lists custom sections associated with the specification. Custom sections are configurable sets of extended attributes. Users with a particular role can add a custom section to the questionnaire by clicking **Add Sections**. eQ displays a dialog box listing available custom sections. Select a section, and then click **Done**. eQ adds the custom section to the bottom of the page.

---

**Note:** Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for a list of roles.

---

For custom sections in eQ, validation rules allow users to designate which individual cells in the custom section are required to be completed by the supplier. Using the drop-down list in the Required column, the eQ creator can also indicate whether just a single cell per row is required (versus specified cells) or the entire row. Individual checkboxes appear in each cell, as [Figure 2-7](#) shows.

**Figure 2-7** Defining required cells

Property	Target	Min	Max	Required
Brix	°Brix	°Brix	°Brix	Specified Cells
pH				Single Cell
Water Activity				Entire Row

Edit Section

The drop-down options are defined as follows:

- **Specified Cells** — Indicates that selected cells will be required. When this option is selected, individual checkboxes appear in each cell. Select the cells that are required. This is the default value.

- **Single Cell** — Indicates that only one cell out of the entire row is required. When this option is selected, the individual checkboxes are cleared and cannot be selected.
- **Entire Row** — Indicates that all cells in the row are required. The checkboxes are auto-selected and cannot be deselected.

For complete instructions on working with custom tables, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.

When the questionnaire has been saved and is viewed by a supplier in Supplier Portal, required cells on the custom table are marked with indicators.

## Saving a Questionnaire

At any point during creation of a questionnaire, you can save the questionnaire by clicking **Save** or **Save & Close** from the action menu and return to it later.

## Sending a Questionnaire to a Supplier

When you have completed the questionnaire, you can send it to the supplier specified in the Contact Information section by clicking **Send eQ** from the action menu.

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

You can view the questionnaire by selecting it from the Action Items page or by using the search tool.

The supplier will receive an email indicating that there is an eQuestionnaire to complete. The supplier's email address will be the userid for the eQ. You can change the supplier contact using the Contact Information section up until the point when a supplier logs in and establishes a password for the eQ.

## Creating a Copy of a Questionnaire

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

To create a new questionnaire based on an existing one:

1. Open the questionnaire to copy.
2. Click **Copy** from the action menu.

## Receiving a Questionnaire - Supplier

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

### Logging in to Supplier Portal

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

### Completing a Questionnaire

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

### Saving a Questionnaire

Suppliers can save the questionnaire by clicking **Save**, or to save the questionnaire and return for completion later, suppliers can click **Save and Close**. Upon return, the supplier must enter the original email address and password to access the questionnaire.

### Returning a Questionnaire

To send the questionnaire back to you, the supplier clicks **Completed - Send to**. eQ checks for any required fields and only returns the form if all required fields are complete. For supplier-initiated questionnaires, the words "Supplier Initiated" display to the right of the Date Sent. For more information on supplier-initiated questionnaires, refer to "[Creating Supplier-Initiated Questionnaires](#)" on page 2-12.

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

## Creating Supplier-Initiated Questionnaires

Suppliers can initiate their own questionnaires through Supplier Portal. If configured properly, the supplier will be presented with a Supplier Actions icon in Supplier Portal. When the supplier chooses **Submit Changes** in the Supplier Actions dialog box, a questionnaire will be created. This process will import all specification and template data. Specification will be required or optional depending on a system configuration.

A supplier initiated template needs to be created to act as the base for the supplier initiated questionnaire. In combination with the imported specification, this template will help create the supplier initiated questionnaire. This template can contain the questionnaire name, company contact information, and template specific sections (User Group selections, Comments, Supplier Created Breakdown, etc.).

### Creating a Questionnaire Template

Users with the role [EQ\_TEMPLATE\_CREATOR] can create a supplier-initiated questionnaire template. The template acts as a base questionnaire for supplier-initiated questionnaires. You can create one template per questionnaire type.

#### Naming Your Supplier-Initiated Template

In the Questionnaire Label field, you can use variables to define the field. These variables will pull in the appropriate information to name the questionnaire. The variables that are available are as follows:

{CrossReference}—Pulls the imported specification's cross reference numbers. This can return multiple values separated by commas (for example: SAP 354623, JDE 235325)

{GSMSpecNumber}—Pulls the imported specification's number.

{GSMSpecName}—Pulls the imported specification's name.

{GSMSpecShortName}—Pulls the imported specification's short name.

{SupplierCompany}—Pulls the company name of the supplier that initiated the questionnaire. This company name comes from the supplier registrant's information.

{SupplierItemCode}—Pulls the supplier item code on the sourcing approval that associated the specification to Supplier Portal.

An example of using variables in the Questionnaire Label field follows:

{GSMSpecNumber} – {GSMSpecName}

This will be replaced as:

5088888-001 – Some Spec Name

In addition, you are able to restrict the amount of characters returned. For example, {GSMSpecName,15} would restrict the string returned to 15 characters. You can add a character restriction limit to any variable listed above.

Follow the instructions beginning on page 2-3 and ending on page 2-6 for completing the rest of the questionnaire template.



**Saving Your Supplier-Initiated Template**

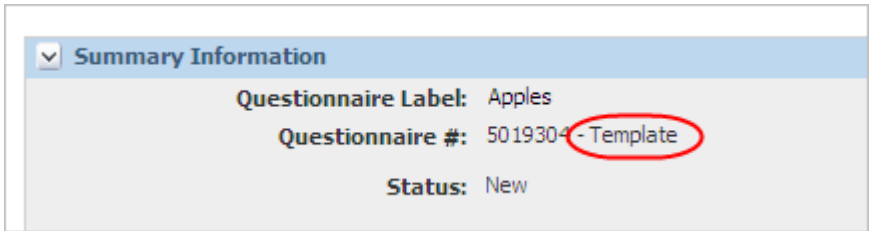
To save the questionnaire template, select **Save As Template** from the action menu, as [Figure 2-8](#) shows. The button is available only to users with the template creation role. For saved questionnaire templates, the **Send eQ** button will not be available. This button is only available in read mode. You must save and close the questionnaire before you can save it as a template.

**Figure 2-8** Save As Template option



Once a questionnaire template is saved, the word "Template" displays next to the Questionnaire #, as [Figure 2-9](#) shows.

**Figure 2-9** Questionnaire identified as a template



Refer to the *Agile Product Lifecycle Management for Process Supplier Portal User Guide* for more information about supplier-initiated questionnaires.

## Processing a Completed Questionnaire

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

**Figure 2-10** Options that display in the action menu for a completed questionnaire



## Reviewing a Questionnaire

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

## Changing Ownership and Access Rights

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

## Exporting a Questionnaire to GSM

To update a GSM specification or to create a specification using data from this questionnaire, select **eQ > GSM** from the action menu.


### Selecting an Import Target

After you select **eQ > GSM**, a dialog box asks how you would like to import the questionnaire. Your options are listed in [Table 2-1](#):

**Table 2-1** Options for importing eQ data into GSM

Option	Action
Create New	Creates a new specification of the same type as the questionnaire
Create New Issue	Creates a new issue of an existing specification
Update Existing	Updates an existing specification without versioning it
Create New From Template	Creates a new specification by using a specified GSM template.

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

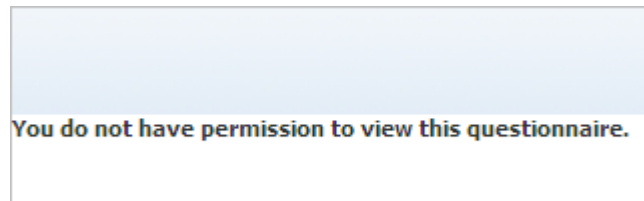
To select this target, click the search icon (  ) located to the right of the **Target Specification** field. eQ displays a dialog box with which you can search for a specification. Click **Done** when you have selected the target specification.

---

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

---

**Figure 2–11** *Insufficient editing permissions error message*



### Importing a Trade Specification

When importing a trade specification, you can update or create a nutrient profile along with the trade specification. eQ only supports trade specifications with the item type of Consumer Unit (co-pack) and Consumer Unit (not for resale - co-pack). [Figure 2–12](#) shows the Nutrient Profile Action drop-down list containing nutrient profile options.

**Figure 2–12** *Imported trade specification, nutrient profile options*

The dialog box titled "Select Import Target" has "Done" and "Cancel" buttons in the top right. It contains the following fields:

- Source Questionnaire:** A text field containing "BBQ Beef and Vegetable Dinner - 11 oz (5019927)".
- Action:** A dropdown menu with "Create New From Template" selected.
- Template:** A text field with a search icon (magnifying glass) to its right.
- Nutrient Profile Action:** A dropdown menu with "Create New Active Profile" selected.

Nutrient Profile drop-down options:

- **Create New Active Profile**—When this option is selected, eQ creates a new nutrient profile specification and marks that profile as active on the trade specification. If an existing profile is already set as active, this action removes that profile's active flag and assigns it to the newly created profile.
- **Create Issue of Active Profile**—When this option is selected, eQ creates a new issue of the existing nutrient profile that is flagged as active and attaches it to the

trade specification as the new active profile. If no active profile exists, this option is not available.

- **Update Existing Active Profile**—When this option is selected, eQ updates the existing nutrient profile that is flagged as active. If no active profile exists, this option is not available.
- **Create New Active Profile from Template**—When this option is selected, eQ creates a new nutrient profile based on a specified nutrient profile template. The nutrient profile created will be marked as active on the trade specification. If an existing profile is already set as active, this action removes that profile's active flag and assigns it to the newly created profile.
- **Do Not Create Nutrient Profile**—When this option is selected, the ability to push nutrient profile data is not available.

### Exporting Data to GSM



After you have successfully selected an import target and clicked **Done**, eQ displays a page containing tabs that show the questionnaire data along with the data from the specification that you are importing data into, as shown in [Figure 2-13](#).

**Figure 2-13** eQuestionnaire page, Nutrient Profile Attributes section, showing target and source for export from a questionnaire to a GSM specification

The screenshot displays the 'Nutrient Profile Attributes' section of the eQuestionnaire page. The page is titled 'Submitted' and shows a comparison between data from an eQuestionnaire and a target specification. The eQuestionnaire data is on the left, and the specification data is on the right. A red arrow icon indicates the move all data function, and a green arrow icon indicates the move single row function. The specification data includes fields for Specification Name, Short Name, Spec #, Category/SubCategory/Group, Reason for Change, Approved for Use In: Business Unit(s), and Approved for Use In: Countries.

From eQuestionnaire	Specification
Specification Name:	Specification Name: Beef with BBQ and Veggie Sauce
Short Name:	Short Name: BBQ Veggie Dinner
	Spec #: 5108138
	Category/SubCategory/Group: No Category Available (Trade)
	No Category Available
	No Category Available
	Reason for Change: New line
	Approved for Use In: Business Unit(s): CPI North America
	Approved for Use In: Countries: Canada, USA

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

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

If your administrator has enabled OLS, you can import data to only those specifications for which you have sufficient user privileges. If you do not have

sufficient user privileges, the system will not display the data. For more information on OLS, please refer to the *Agile Product Lifecycle for Process Security Configuration Guide*.

You can save the updated specification by clicking **Save** from the action menu.

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

Once you have successfully imported the data and saved the specification, the status changes to "submitted" and the Action Items table no longer displays the questionnaire. For more information on statuses, see "Status" on page 2-4.

## Returning a Questionnaire to a Supplier

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

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

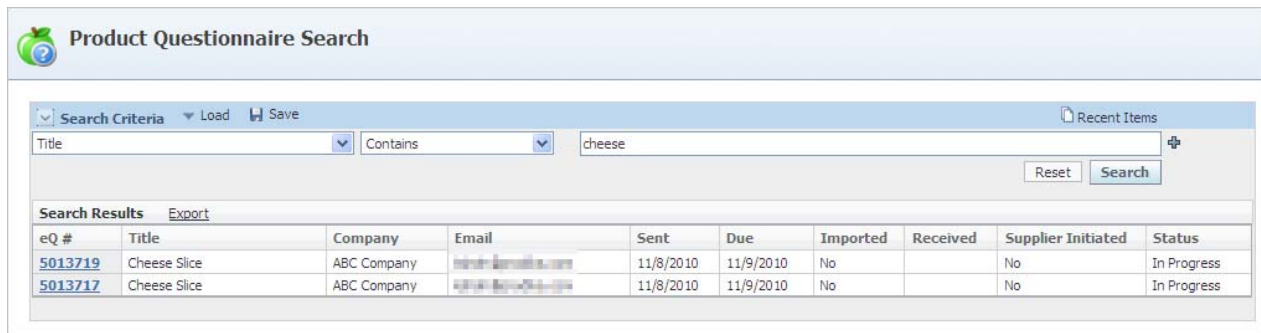
## Searching for Questionnaires

You can retrieve all questionnaires created by clicking the appropriate questionnaire type in the left navigation panel, from the Applications menu, or from selecting **Open > [type] Questionnaire** from the action menu. eQ displays a search form for that questionnaire type, as [Figure 2-14](#) shows.

**Figure 2-14** Questionnaire search page

Using the search page, you can retrieve the questionnaires by using many of the questionnaire's attributes as search criteria.

The search results will contain all questionnaires that match your defined search criteria, as [Figure 2-15](#) shows. You can open only the questionnaires for which you have sufficient access permissions.

**Figure 2–15 Search results**

The screenshot displays the 'Product Questionnaire Search' interface. At the top, there's a header with a green apple icon and the title 'Product Questionnaire Search'. Below this is a search bar with a dropdown menu set to 'Title', a search type dropdown set to 'Contains', and a text input field containing 'cheese'. To the right of the search bar are buttons for 'Reset' and 'Search', and a 'Recent Items' link. Below the search bar, there's a section for 'Search Results' with an 'Export' link. The results are presented in a table with the following columns: eQ #, Title, Company, Email, Sent, Due, Imported, Received, Supplier Initiated, and Status. Two results are shown, both for 'Cheese Slice' from 'ABC Company' with a status of 'In Progress'.

eQ #	Title	Company	Email	Sent	Due	Imported	Received	Supplier Initiated	Status
<a href="#">5013719</a>	Cheese Slice	ABC Company	<a href="#">mailto:abc@abc.com</a>	11/8/2010	11/9/2010	No		No	In Progress
<a href="#">5013717</a>	Cheese Slice	ABC Company	<a href="#">mailto:abc@abc.com</a>	11/8/2010	11/9/2010	No		No	In Progress

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