

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

Product Quality Scorecard User Guide

Release 6.1.1

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# Preface

The *Agile Product Lifecycle Management for Process Product Quality Scorecard User Guide* explains how to use the Product Quality Scorecard (PQS) application to create, organize, and manage quality sessions. You will learn to create scorecards based on testing protocols and manage samples.

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 Agile 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

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## Related Documents

For more information, see the following documents in the Agile PLM for Process Release 6.1.1 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 Supply Chain Relationship Management User Guide*
- *Agile Product Lifecycle Management for Process Reporting User 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#plmprocess>

# Conventions

The following text conventions are used in this document: Possibly add more here, copied from our conventions?

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.





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# Introduction to Product Quality Scorecard

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

- Quality session management to organize and manage evaluation sessions
- Quality scorecarding based on testing protocols defined in Global Specification Management (GSM)
- Sample management with the ability to track supply source

## Touch Points with Other Agile PLM for Process Applications

The Product Quality Scorecard application interfaces with several other Agile PLM for Process applications.

### Global Specification Management

Global Specification Management (GSM) serves as a tool to create and modify your products, including finished products and manufacturing processes. The data found in GSM is used by other Agile PLM for Process applications as well as other systems in your company to support many different business processes. PQS uses testing protocols, which must be configured in GSM.

### Supply Chain Relationship Management

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

In PQS, users create samples or participate in testing sessions. These samples and sessions are associated with sourcing and receiving facilities created and managed in SCRM.

### Reporting

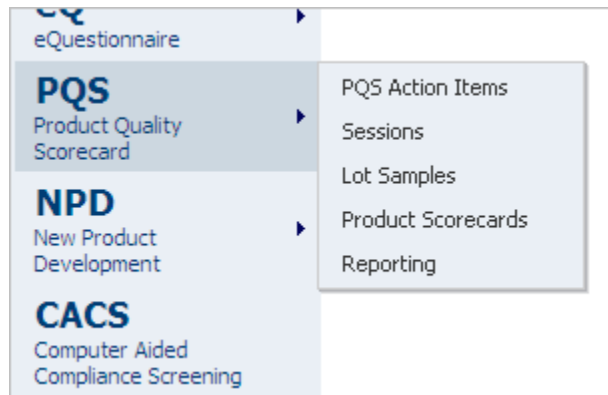
PQS uses the Agile PLM for Process Reporting application (RPT) framework for creating custom reports.

# Getting Started with Product Quality Scorecard

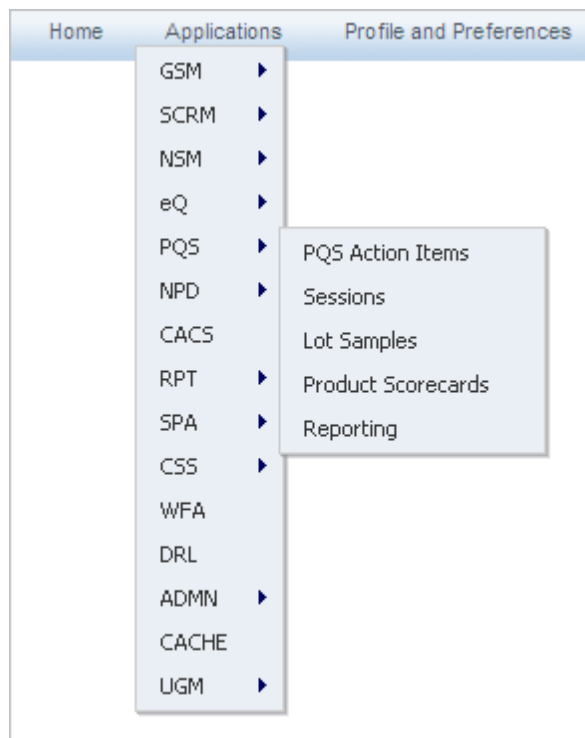
## Accessing Product Quality Scorecard

To access the Product Quality Scorecard application, select PQS from the left navigation panel as shown in [Figure 1-1](#) or select PQS from the Applications menu of the top menu bar, as shown in [Figure 1-2](#).

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



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



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

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## Using Product Quality Scorecard

This chapter presents basic information about using the Product Quality Scorecard application. Topics in this chapter include:

- [Overview](#)
- [Creating Samples](#)
- [Defining Sessions](#)
- [Testing Samples](#)
- [Using Scorecards](#)
- [Testing Protocols](#)
- [Reporting in PQS](#)

### Overview

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

Users with the following business functions use PQS:

- **Quality administrators**—Create quality sessions and product samples. They monitor PQS sessions, assign product samples and testers to PQS sessions, and can also run reports.
- **Evaluators**—Test PQS samples and score them according to the assigned protocol.
- **Management**—Customers write custom reports to analyze quality data.

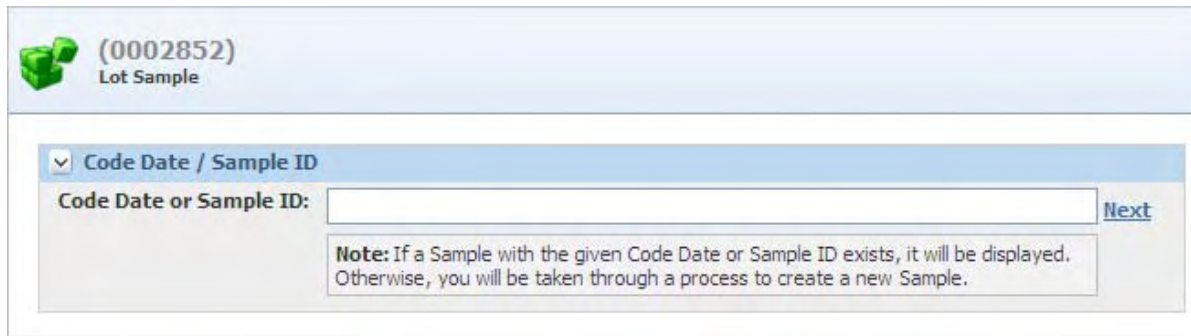
## Creating Samples

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

To create a new sample:

1. Select **New > Lot Sample** from the action menu. Product Quality Scorecard displays the Lot Sample page, as [Figure 2-1](#) shows.

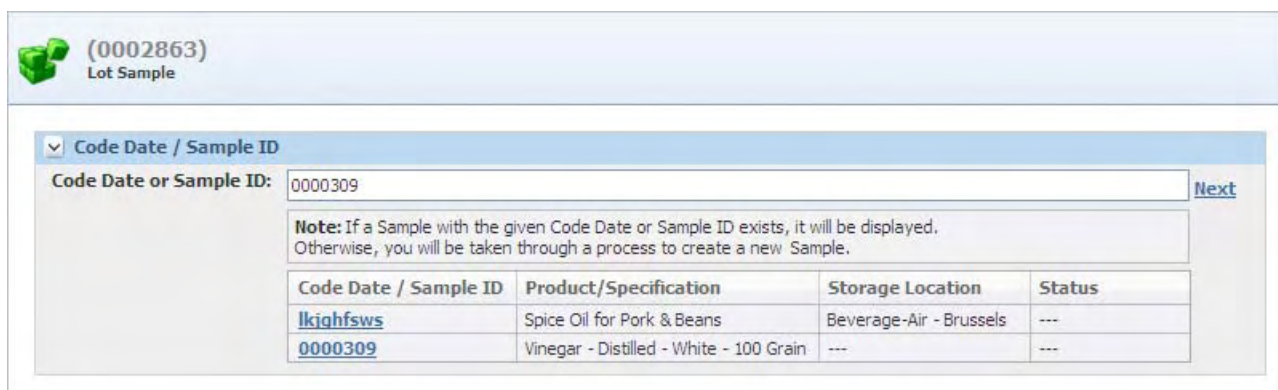
**Figure 2-1** Lot Sample page



The screenshot shows the 'Lot Sample' page with a header bar containing a green cube icon and the text '(0002852) Lot Sample'. Below the header is a section titled 'Code Date / Sample ID' with a dropdown arrow. Inside this section is a text input field labeled 'Code Date or Sample ID:' and a 'Next' button. A note below the input field states: 'Note: If a Sample with the given Code Date or Sample ID exists, it will be displayed. Otherwise, you will be taken through a process to create a new Sample.'

2. Type the code date or ID of the sample in the **Code Date or Sample ID** field.
3. Click **Next** or press **Enter**. If a sample with the ID that you typed already exists, PQS displays it in a table, as shown in [Figure 2-2](#):

**Figure 2-2** Existing samples matching the name entered



The screenshot shows the 'Lot Sample' page with a header bar containing a green cube icon and the text '(0002863) Lot Sample'. Below the header is a section titled 'Code Date / Sample ID' with a dropdown arrow. Inside this section is a text input field labeled 'Code Date or Sample ID:' containing the value '0000309' and a 'Next' button. A note below the input field states: 'Note: If a Sample with the given Code Date or Sample ID exists, it will be displayed. Otherwise, you will be taken through a process to create a new Sample.'

Code Date / Sample ID	Product/Specification	Storage Location	Status
<a href="#">lkighfsws</a>	Spice Oil for Pork & Beans	Beverage-Air - Brussels	---
<a href="#">0000309</a>	Vinegar - Distilled - White - 100 Grain	---	---

4. If a sample with that name does not exist, the Select Specification page displays, as shown in [Figure 2-3](#). Use this page to create a sample using the following sections:
  - **Code Date**—Displays the Code Date or ID that you entered in the previous screen
  - **Specification**—Associate the sample with a specification in GSM. This is a required field.
  - **Source Facility**—Associate the sample with a sourcing facility
  - **Receiving Facility**—Associate the sample with a receiving facility

Figure 2-3 Select Specification page

(0002863)  
Lot Sample



**Code Date**  
Code Date: 2011-04-19

**Specification**  
Cross Reference: 2ORCA  
Specification: [dropdown] [search icon]

**Source Facility**  
Cross Reference: 2ORCA  
Source Facility: [dropdown] [search icon]

**Receiving Facility**  
Cross Reference: 2ORCA  
Receiving Facility: [dropdown] [search icon]

← →

5. In the Specification section, search for a particular specification. The **Specification** field to the left of the search icon in this section is a required field. You can search in any of the following ways:
  - Click the search icon (  ) and select a specification using the specification search page.
  - Search for a specification by cross-reference. Select a system ID from the Cross Reference dropdown list, enter an equivalent number for the specification, and click **Search**. Matching specifications are listed in the Specification dropdown list. Select one specification.
6. Enter source and receiving facilities in the same manner. If sourcing approvals exist for the specification that you chose, PQS populates possible source and receiving facilities for you.
7. Click the next page icon (  ). The Sample Summary page displays. This page consists of the following sections:
  - Summary Information
  - Sample Details
  - Attachments

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

---

## Sample Details Section

The Sample Details section, shown in [Figure 2-4](#), displays general information about the sample.

**Figure 2-4 Sample Details section**

The screenshot shows a 'Sample Details' form with the following fields and values:

- Sample #:** 0002863
- Sample Type:** Incoming Material (dropdown menu)
- Location:** House of Flavors - Latin America (Brazil) (text field with delete and search icons)
- Internal Alias:** 75 (text field)
- Code Date:** 2011-04-19 (text field)
- GTIN/UPC/EAN:** (empty text field)
- Manufacture Date:** 3/1/2011 (text field with calendar icon)
- Use-Through Date:** 7/4/2011 (text field with calendar icon)
- Log/Receiving#:** (empty text field)
- Waybill/Invoice#:** (empty text field)
- Quantity:** 50 (text field)
- Temperature:** (empty text field with 'C' dropdown menu)
- Receiving Condition:** (empty text field)
- Notes:** (empty text area)
- Date Received:** 3/8/2011 (text field with calendar icon)
- Scheduled Evaluation:** 3/10/2011 (text field with calendar icon)

Key fields include:

- **Sample #** — An autogenerated unique identifier. This field cannot be changed.
- **Sample Type** — This is used to further describe the sample, for example, Incoming Material versus Internally Manufactured Product. The available options in this list are defined by your administrator using the ADMN application.
- **Location** — Use this field to identify where to use or evaluate this sample. This field allows you to associate the sample to a facility defined in SCRM.
- **Internal Alias** — This is an identifier used when displaying samples to Session Participants. See [Figure 2-9](#) on page 2-9 for an example.
- **Manufacture Date** — Date on which the sample was manufactured. Click the calendar icon (📅) to select a date.
- **Use-Through Date** — Expiration date of the sample (required). Click the calendar icon (📅) to select a date.
- **Date Received** — Date on which the sample was received. Click the calendar icon (📅) to select a date.
- **Scheduled Evaluation** — Date on which the sample is expected to be tested. Click the calendar icon (📅) to select a date.

## Attachments Section

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

To add an attachment:

1. If the Sample Summary page is not already in edit mode, click **Edit** in the action menu. PQS reloads the page in editable form.
2. Under the Attachments section, click **Add New**, as shown in Figure 2–5. The Attachments/Comments dialog box opens.

**Figure 2–5 Attachments section**



3. Click **Browse** to navigate to and select one or more local files to upload.
4. Click **Upload**.
5. Enter any comments in the **Comments** field.
6. Click **Done** at the top right of the dialog box. The attachment is added to the Attachments grid.
7. Once you have entered all the information, click **Save & Close** to save the sample details. You can then create a session for testing the sample.

## Defining Sessions

Product Quality Scorecard sessions establish the following:

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

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

To create a session:

1. Click **New > PQS Session** from the action menu. The PQS Session page displays, as [Figure 2–6](#) shows.

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

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**Figure 2–6** PQS Session page

The screenshot displays the 'Curly Fries (0000951) PQS Session' page with a 'Pending' status. The page is divided into two main sections: 'Session Information' and 'Samples'.

**Session Information:**

- Session #:** 0000951
- Session Name:** Curly Fries
- Status:** Pending (dropdown menu)
- Location:** ABC - Dallas
- Evaluation Date:** 4/18/2011
- Session Leader:** Stevens, Avril
- Notes:** 2 g of cilantro added
- Testing Protocol:** Protocol Test 0806
- Scorecard Type:** Sensory - Blind
- Users:** Bev Allen, Sylvia Arzel

**Samples:**

Sample #	Product Name	Code Date	Internal Alias	Supplier
0000923	Prodika Fries	Curly Fries Sample 1		ABC Facility

An 'Add New' button is located below the samples table.

The page consists of two sections: Session Information and Samples.

2. In the Session Information section, enter information in the applicable key fields.
  - **Session #** — An autogenerated unique identifier. This field cannot be changed.
  - **Session Name** — A free-text field (required).




- **Status** — Select "Pending" or "Complete" from the dropdown list. Pending sessions show up in the Action Items list; completed sessions do not.
  - **Location** — Facility where the testing session will take place (required). Click the search icon (🔍) to use the Facility Search page to select a facility.
  - **Evaluation Date** — Date on which the session will take place. Click the calendar icon (📅) to select a date.
  - **Session Leader** — By default, the value of this field is the creator of the session in PQS. A session leader can be any other user as well. Click the search icon (🔍) to use a search page to select a user.
  - **Testing Protocol** — Defines the scorecard to use (scorecards are created based on testing protocols in GSM). This field is required. Click the search icon (🔍) to use a search page to select a protocol.
  - **Scorecard Type** — Defines the layout of the scorecard. Select a type from the dropdown list.
  - **Users** — A list of testers for this session. Click the search icon (🔍) to use a search page to select users.
3. In the Samples section, click **Add New** to use a search page to select samples.
  4. Once you have entered all the information, click **Save & Close** to save the session. Each user defined as a tester (in the Users field) will receive an action item for the session in his or her Action Items list. Inside that session action item, a separate sub-action is created for each sample that is in the session.

## Working with Action Items

View action items assigned to you by selecting PQS Action Items from the action menu. PQS displays the Action Items page, as shown in [Figure 2-7](#).

**Figure 2-7** Action Items page

 Action Items				
<div> <div>Session Participant</div> <div>10</div> <div>1 2 3 4 ...4</div> </div>				
	Session #	Session Name	Evaluation Date	Location
1	0000581	Veggie Burger	01/26/2009	A E Staley Manufacturing Co
2	0000546	Special Samples	05/17/2009	ABC Company
3	0000863	Low Sodium Chicken Strips	12/26/2010	ABC - Dallas

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

## Searching for a Session

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

### Pending Sessions Tab


As shown in [Figure 2–8](#), the Pending Sessions tab consists of two lists of sessions:

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

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

Click anywhere in a row to open the session.

**Figure 2–8** Pending Sessions tab



PQS Session Search

Search

Pending Sessions

Session Leader

10

< 1 2 3 4 ...4 >

	Session #	Session Name	Evaluation Date	Location
1	0000411	Fries	25-Nov-2008	Prodika Europe
2	0000401	Seasoned Fries	24-Nov-2008	ABC - Dallas
3	0000449	Steak Fries	22-Apr-2009	Prodika Europe
4	0000416	Crinkle Fries	22-Dec-2008	ABC - Dallas
5	0000341	Special Fries	07-Jul-2008	ABC - Dallas
6	0000259	Chicken Strips	14-Sep-2007	Archer
7	0000254	Chicken Strips - Low Sodium	07-Sep-2007	ABC - Dallas
8	0000331	Chicken Wings	22-Apr-2008	A E Staley Manufacturing Co
9	0000326	Chicken Wings - Hot	02-Apr-2008	ABC - Dallas
10	0000916	Chicken Wings - Frozen	27-Jan-2011	Company-Facility

10

< 1 2 3 4 ...4 >

Session Participant

10

< 1 2 3 4 ...4 >

	Session #	Session Name	Evaluation Date	Location
1	0000581	Burger	26-Jan-2009	A E Staley Manufacturing Co
2	0000546	Veggie Burger	17-May-2009	ABC Company
3	0000863	Veggie Burger Frozen	26-Dec-2010	ABC - Dallas
4	0000862	Patty	26-Dec-2010	ABC - Dallas
5	0000489	Seasoned Patty	04-May-2009	ABC Company

## Testing Samples

You can navigate to sample scorecards that you need by:

- Selecting a session from the Action Items page
- Searching for and then selecting a sample using the Lot Sample Search page (see ["Using the Lot Samples Page"](#) on page 2-11)

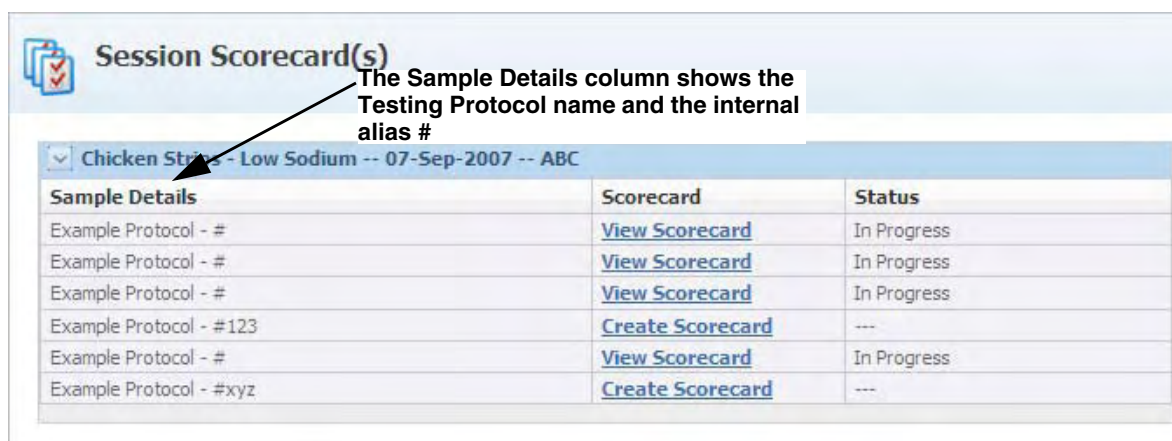
### Using Action Items

If you are assigned as a tester for a particular session, your Action Items list includes an item to create a scorecard for each sample in the session. On the Action Items page, click anywhere in a row to open a session. PQS displays the Session Scorecard(s) page, shown in [Figure 2-9](#).

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

You can partially complete a scorecard and then save it for later completion.

**Figure 2-9 Session Scorecard(s) page**



The Sample Details column shows the Testing Protocol name and the internal alias #

Sample Details	Scorecard	Status
Example Protocol - #	<a href="#">View Scorecard</a>	In Progress
Example Protocol - #	<a href="#">View Scorecard</a>	In Progress
Example Protocol - #	<a href="#">View Scorecard</a>	In Progress
Example Protocol - #123	<a href="#">Create Scorecard</a>	---
Example Protocol - #	<a href="#">View Scorecard</a>	In Progress
Example Protocol - #xyz	<a href="#">Create Scorecard</a>	---

When you click the **View Scorecard** or **Create Scorecard** link, the Scorecard Observation page displays the scorecard, as shown in [Figure 2-10](#). The contents of this page can vary, depending on which testing protocol and which scorecard was selected for the session.

Figure 2–10 Scorecard Observation page

Scorecard Observation
Save Save & Close Complete Cancel

Example Protocol ---SAMPLE #123

Scorecard Information
Show additional attributes...

Qualification: Final Score
Panelist Name:

Temperature
This is the first section

Criteria	Score	Comments	%
Cooling - After Processing - Internal Temperature	<input type="radio"/> 20 degrees <input type="radio"/> 30 degrees <input type="radio"/> 32 degrees <input type="radio"/> 33 degrees <input type="radio"/> 35 degrees <input type="radio"/> 39 degrees <input type="radio"/> 41 degrees	<input type="checkbox"/> 1. cold <input type="checkbox"/> 3. cool <input type="checkbox"/> 4. moist <input type="checkbox"/> 6. warm <input type="checkbox"/> 5. dry <input type="checkbox"/> 2. hot 	---
Delivery Temperature	<input type="radio"/> Frozen Solid <input type="radio"/> Mostly Frozen <input type="radio"/> Somewhat Slushy <input type="radio"/> Melted <input type="radio"/> Tepid <input type="radio"/> Warm <input type="radio"/> Hot		---

Temperature - Score : 0

Color
This is the second section

Criteria	Score	Comments	%
Color	<input type="radio"/> white <input type="radio"/> pale pink <input type="radio"/> pink <input type="radio"/> red <input type="radio"/> brown <input type="radio"/> dark brown <input type="radio"/> black		---
Appearance and Color	<input type="radio"/> Very Bright <input type="radio"/> Bright <input type="radio"/> Glossy <input type="radio"/> Satin <input type="radio"/> Low gloss <input type="radio"/> flat <input type="radio"/> dull		---

Color - Score : 0

Texture
This is the third section

Criteria	Score	Comments	%
Texture	<input type="radio"/> Smooth as glass <input type="radio"/> Slightly rough <input type="radio"/> Sand paper		---

Texture - Score : 0

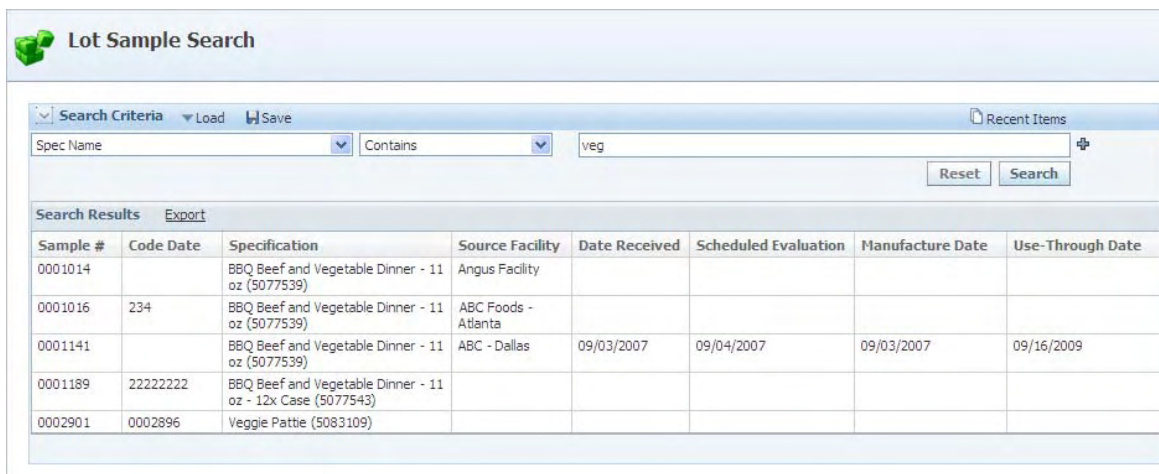
Some Good Example Protocol ---SAMPLE #123 - Score: 0

Back to Top Save Save & Close Complete Cancel

## Using the Lot Samples Page

You can also test a sample by selecting **Open > Lot Sample** from the action menu and using the Lot Sample Search page to select the sample to test. Returned samples are displayed on the Search Samples page, as [Figure 2-11](#) shows.

**Figure 2-11** Search Samples page with returned samples



The screenshot shows the 'Lot Sample Search' interface. At the top, there's a header with a green cube icon and the title 'Lot Sample Search'. Below this is a search criteria section with a dropdown menu set to 'Search Criteria', buttons for 'Load' and 'Save', and a 'Recent Items' link. The search criteria include a 'Spec Name' dropdown, a 'Contains' dropdown, and a text input field containing 'veg'. There are 'Reset' and 'Search' buttons. Below the search criteria is a 'Search Results' section with an 'Export' link. The results are displayed in a table with the following data:

Sample #	Code Date	Specification	Source Facility	Date Received	Scheduled Evaluation	Manufacture Date	Use-Through Date
0001014		BBQ Beef and Vegetable Dinner - 11 oz (5077539)	Angus Facility				
0001016	234	BBQ Beef and Vegetable Dinner - 11 oz (5077539)	ABC Foods - Atlanta				
0001141		BBQ Beef and Vegetable Dinner - 11 oz (5077539)	ABC - Dallas	09/03/2007	09/04/2007	09/03/2007	09/16/2009
0001189	22222222	BBQ Beef and Vegetable Dinner - 11 oz - 12x Case (5077543)					
0002901	0002896	Veggie Pattie (5083109)					

Refer to ["Searching for a Session"](#) on page 2-8 for more information on searching. Click anywhere in a row to open the sample.

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

[Figure 2-12](#) shows the Sample Summary page of the selected sample.



Figure 2–12 Sample Summary for selected sample

**Summary Information**  
**Specification:** BBQ Beef and Vegetable Dinner - 11 oz (5077539-001)   
**Source Facility:** Angus Facility (USA)   
**Receiving Facility:**   
**Originator:** **Created:** 16-Jul-2007

**Sample Details**  
**Sample #:** 0001014  
**Sample Type:** Incoming Material   
**Location:** ABC Facility (USA)   
**Internal Alias:** 123  
**Code Date:**   
**Manufacture Date:** 3/1/2011   
**Log/Receiving#:** A-50  
**Quantity:** 5.00  
**Receiving Condition:** Excellent  
**Notes:**   
**Date Received:** 3/7/2011   
**GTIN/UPC/EAN:**   
**Use-Through Date:** 7/4/2011   
**Waybill/Invoice#:** 50555  
**Temperature:** C   
**Scheduled Evaluation:** 3/15/2011

**Attachments**  
**Attachments**  
 There are no attachments

**Scorecards**

Scorecard	By	Qualification	Score	Date	Status	Delete
<a href="#">5000853 - Special Samples # 101 - 123 (Special Samples)</a>		---	2.33	28-Aug-2007	Complete	
<a href="#">5000806 - 123</a>		Training	0.00	16-Jul-2007	In Progress	

To create a new scorecard for the sample, click **Add New** under the Scorecards section. Product Quality Scorecard displays the Scorecard Summary page, as shown in Figure 2–13.

Figure 2–13 Scorecard Summary page

Scorecard Summary		Save	Save & Close	Complete
<div> <div>Summary Information</div> <div> <b>Specification:</b> BBQ Beef and Vegetable Dinner - 11 oz (5077539-001)           <b>Source Facility:</b> Angus Facility (USA)           <b>Receiving Facility:</b> <b>Originator:</b> <b>Created:</b> 16-Jul-2007         </div> </div>				
<div> <div>Sample Details</div> <div> <b>Sample #:</b> 0001014  <b>Sample Type:</b> Incoming Material  <b>Location:</b>  <b>Internal Alias:</b> 123  <b>Code Date:</b>  <b>Manufacture Date:</b>  <b>Log/Receiving#:</b>  <b>Quantity:</b> Cases  <b>Receiving Condition:</b>  <b>Notes:</b>  <b>Date Received:</b> </div> <div> <b>GTIN/UPC/EAN:</b>  <b>Use-Through Date:</b>  <b>Waybill/Invoice#:</b>  <b>Temperature:</b> C  <b>Scheduled Evaluation:</b> </div> </div>				
<div> <div>Attachments</div> <div>           Attachments            There are no attachments         </div> </div>				
<div> <div>Scorecard Information</div> <div> <b>Scorecard #:</b> 5001597  <b>Testing Protocol:</b> Special Sample #101  <b>Scoring Location:</b>  <b>Scored By:</b> Arzel, Sylvia  <b>Qualification:</b> Final Score  <b>Date of Scoring:</b> 5/31/2011  <b>Special Notes:</b> </div> <div> <b>Scorecard Type:</b> Sensory - Blind  <b>Panelist Name:</b> John Tatum         </div> </div>				

The Scorecard Summary page consists of the following sections:

- Summary Information Section
- Sample Details Section
- Attachments Section
- Scorecard Information Section

### Summary Information Section

The Summary Information section displays the core information about the session:

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

### Sample Details Section

The Sample Details section displays information about the sample in the following fields: Sample #, Sample Type, Location, Manufacture Date, Date Received, and several other fields that describe the sample.




### Attachments Section

The Attachments section lists all the attachments related to the sample.

### Scorecard Information Section

The Scorecard Information section displays default information about how the sample will be tested.

Key fields include:

- **Scorecard #** — An autogenerated unique identifier. This field cannot be changed.
- **Testing Protocol** — Prepopulated with the default value if a testing protocol is defined for that specification in GSM. You can select another testing protocol using the search icon (  ).
- **Scored By** — Use the search icon (  ) to select the person testing the sample (required).
- **Scorecard Type** — Select a scorecard type from the dropdown list.
- **Qualification** — Select a qualification from the dropdown list. This list is defined by a system administrator.
- **Panelist Name** — The name of the panelist who will complete the scorecard.
- **Date of Scoring** — Defaults to today's date. Click the calendar icon (  ) to change it.

When you click the next page icon (  ), Product Quality Scorecard displays a new scorecard.



## Using Scorecards

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

- Sensory - Blind
- Blind Sensory - 9 point scale

### Sensory - Blind

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

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

### Blind Sensory - 9 point scale

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

PQS administrators can see product and supplier details on this type of scorecard.

## Testing Protocols

A testing protocol defines which tests are displayed on a scorecard. You can define testing protocols in Global Specification Management. Use them to create scorecards in the PQS application.

If you intend to use the testing protocol in PQS, then select **Qualitative** from the Record As drop-down list. For details on testing protocols, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

## Reporting in PQS

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

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

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

