Oracle® Agile Product Lifecycle Management for Process

Product Quality Scorecard User Guide

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Oracle Agile Product Lifecycle Management for Process Product Quality Scorecard User Guide, Release 6.1.1.5

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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 6.1.1.1 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

Conventions

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

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

1

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

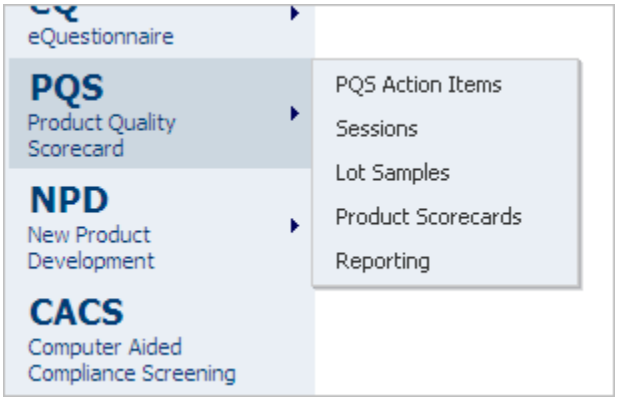
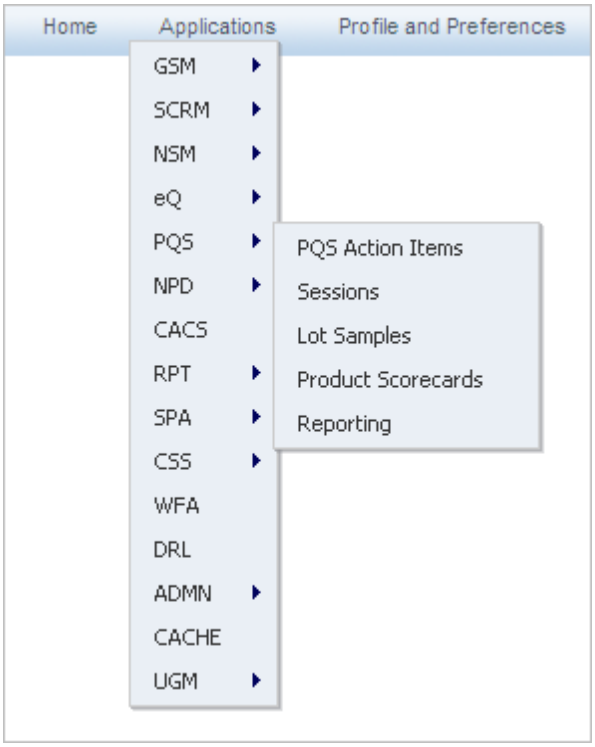


Figure 1–2 The PQS menu from the Applications menu on the top menu bar



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

2

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.

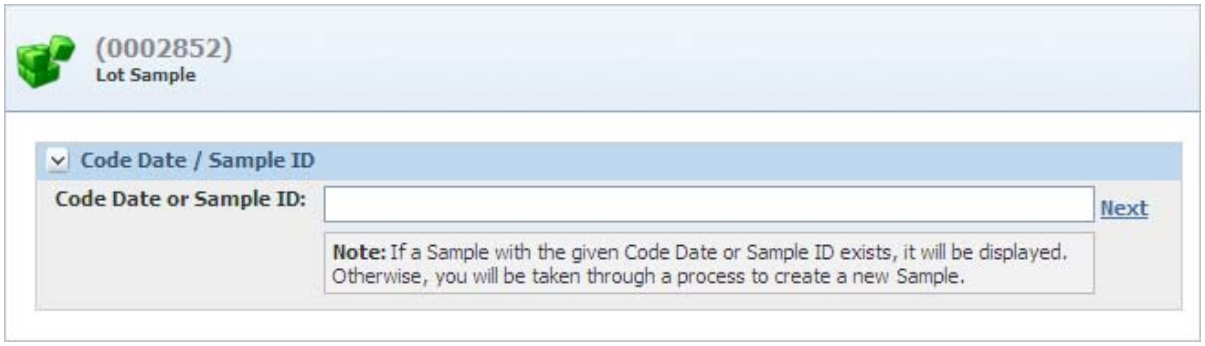
Creating Samples

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:

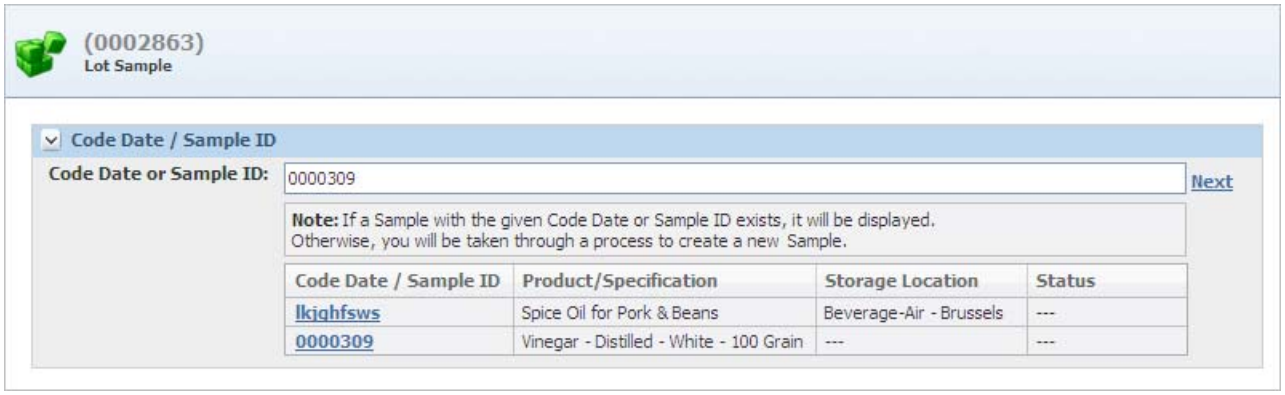
1. Select **New > Lot Sample** from the action menu. Product Quality Scorecard displays the Lot Sample page, as Figure 2–1 shows.

Figure 2–1 Lot Sample page



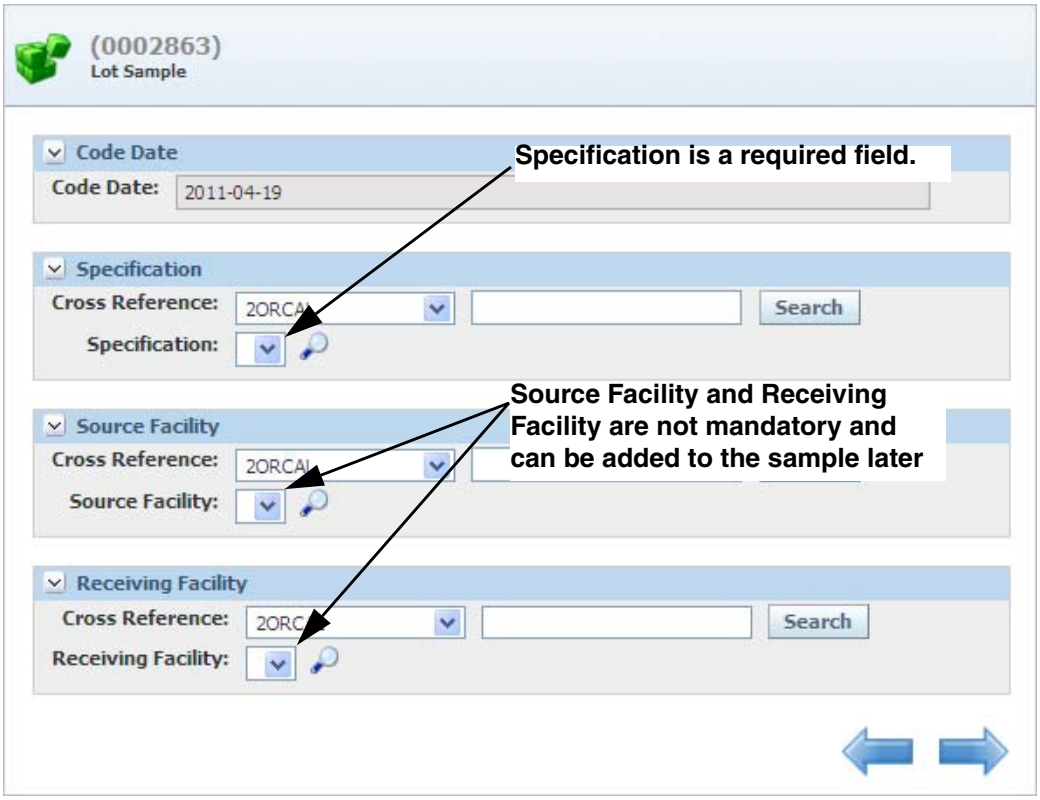
2. Type the code date or ID of the sample in the **Code Date or Sample ID** field.
3. Click **Next** or press **Enter**. If a sample with the ID that you typed already exists, PQS displays it in a table, as shown in Figure 2–2:

Figure 2–2 Existing samples matching the name entered



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



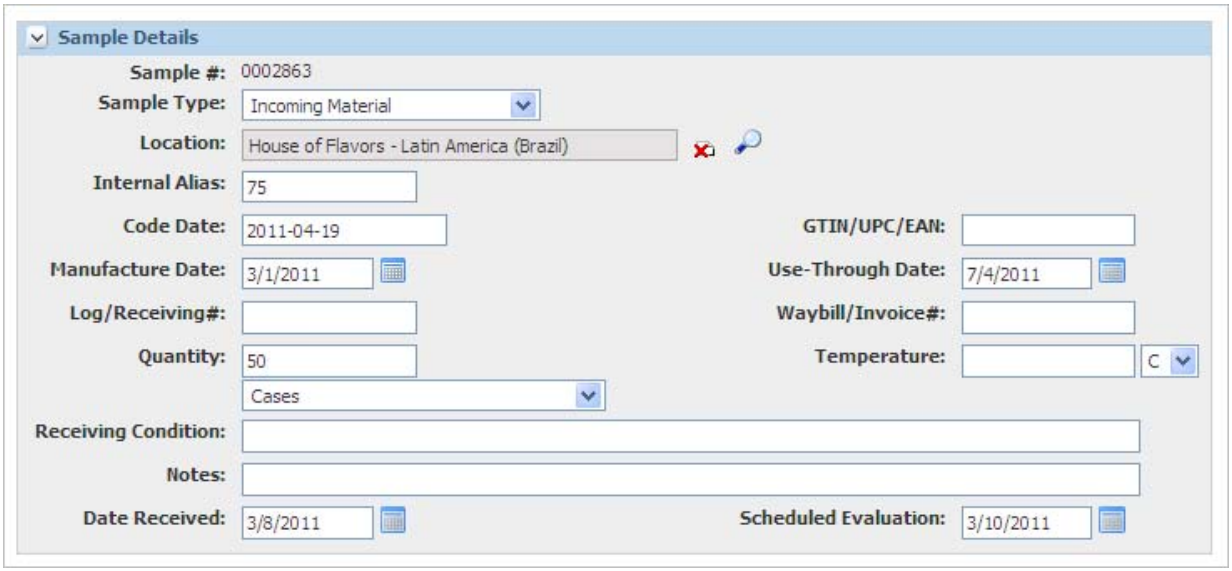
5. In the Specification section, search for a particular specification. The **Specification** field to the left of the search icon in this section is a required field. You can search in any of the following ways:
   - Click the search icon ( ) and select a specification using the specification search 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

   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



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

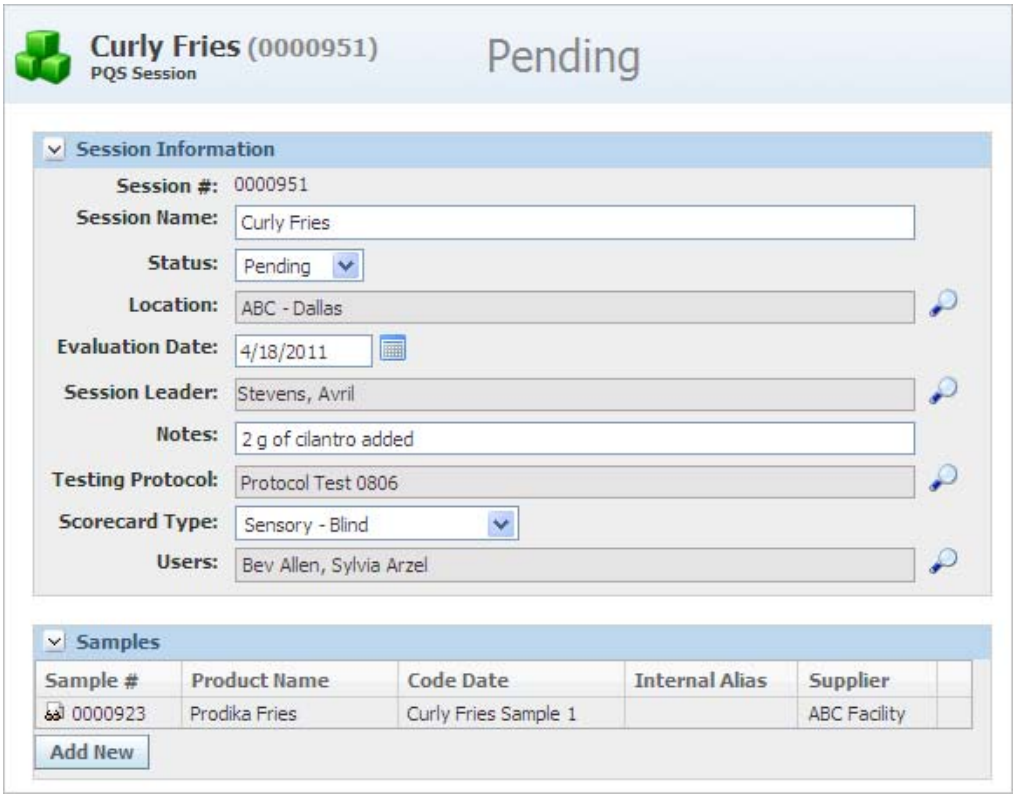
Typically, sessions are used for organized testing in which multiple testers test multiple samples sequentially. A quality administrator creates a PQS session using the Session Information page.

To create a session:

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

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

Figure 2–6 PQS Session page



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

	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

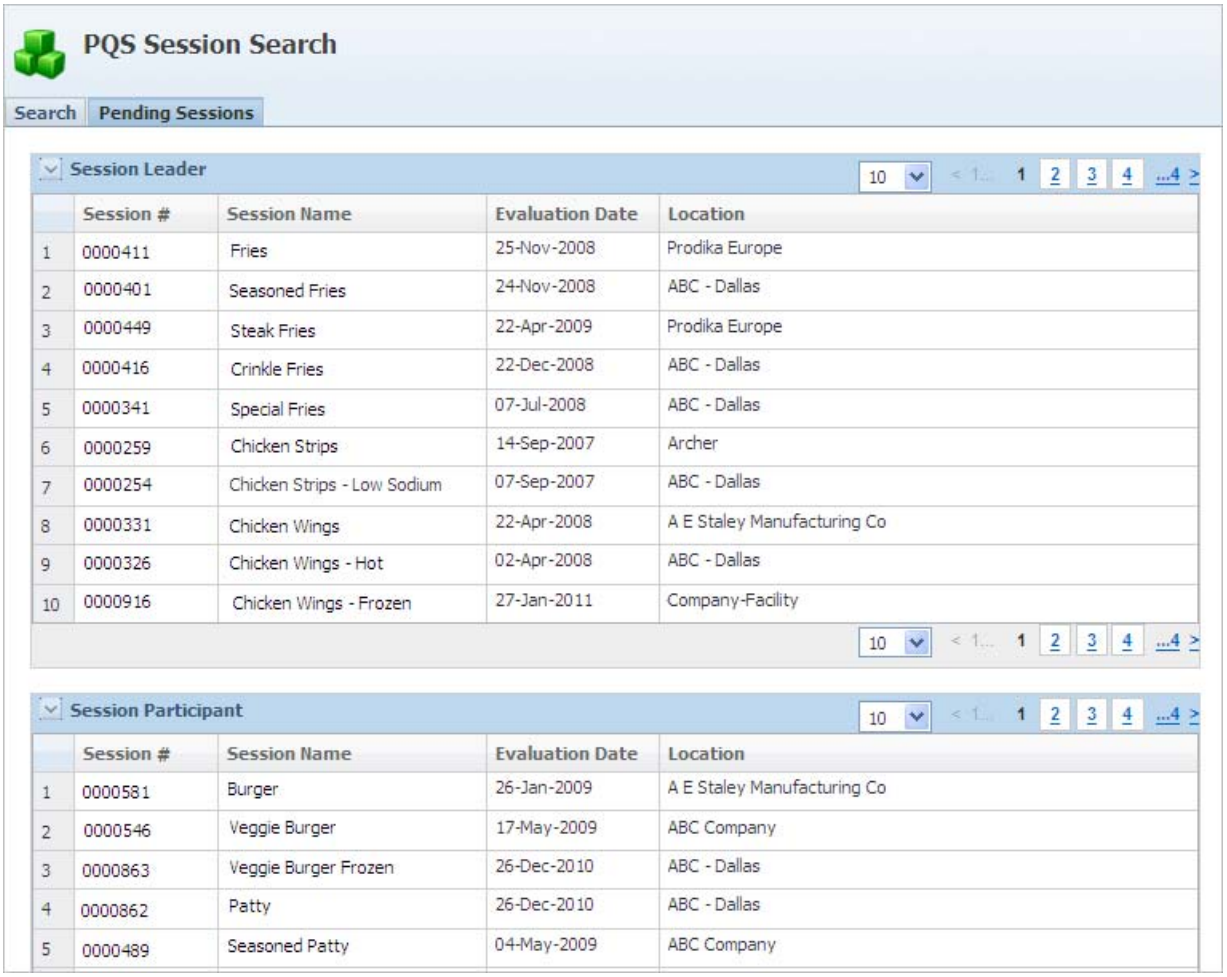
As shown in Figure 2–8, the Pending Sessions tab consists of two lists of sessions:

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



	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

	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)

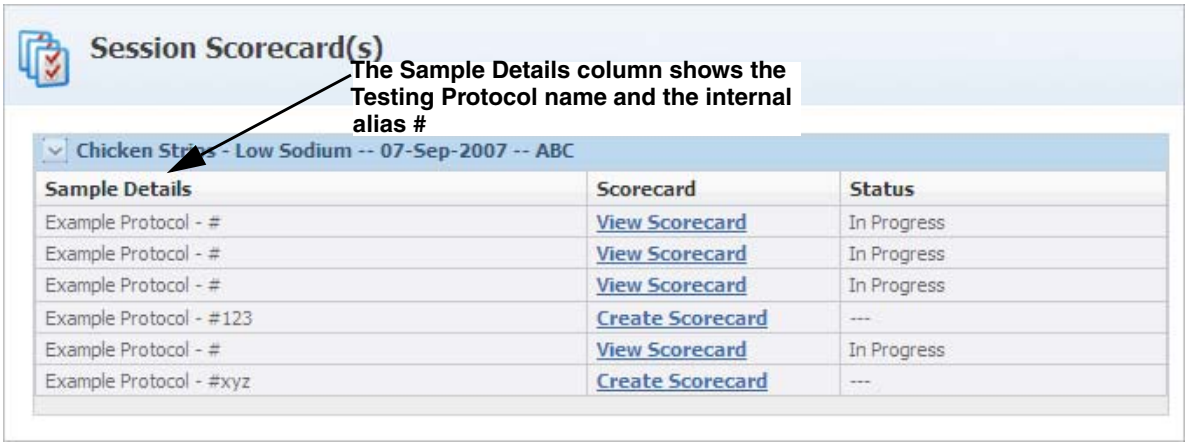
Using Action Items

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



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	20 degrees 30 degrees 32 degrees 33 degrees 35 degrees 39 degrees 41 degrees	1. cold 3. cool 4. moist 6. warm 5. dry 2. hot	---
Delivery Temperature	Frozen Solid Mostly Frozen Somewhat Slushy Melted Tepid Warm Hot		---
		Temperature - Score :	0

Color

This is the second section

Criteria	Score	Comments	%
Color	white pale pink pink red brown dark brown black		---
Appearance and Color	Very Bright Bright Glossy Satin Low gloss flat dull		---
		Color - Score :	0

Texture

This is the third section

Criteria	Score	Comments	%
Texture	Smooth as glass Slightly rough Sand paper		---
		Texture - Score :	0

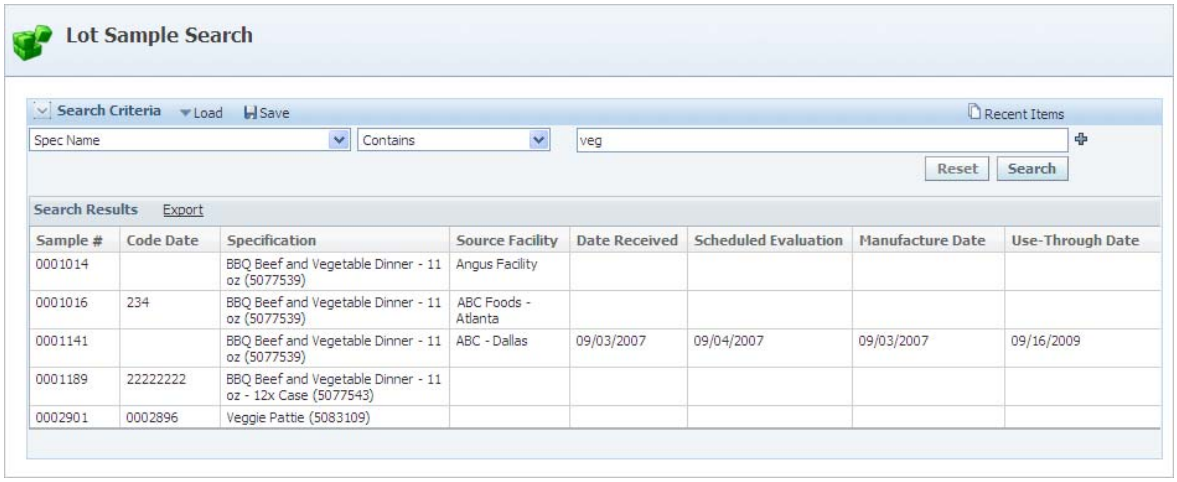
Some Good Example Protocol ---SAMPLE #123 - Score: 0

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



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)					

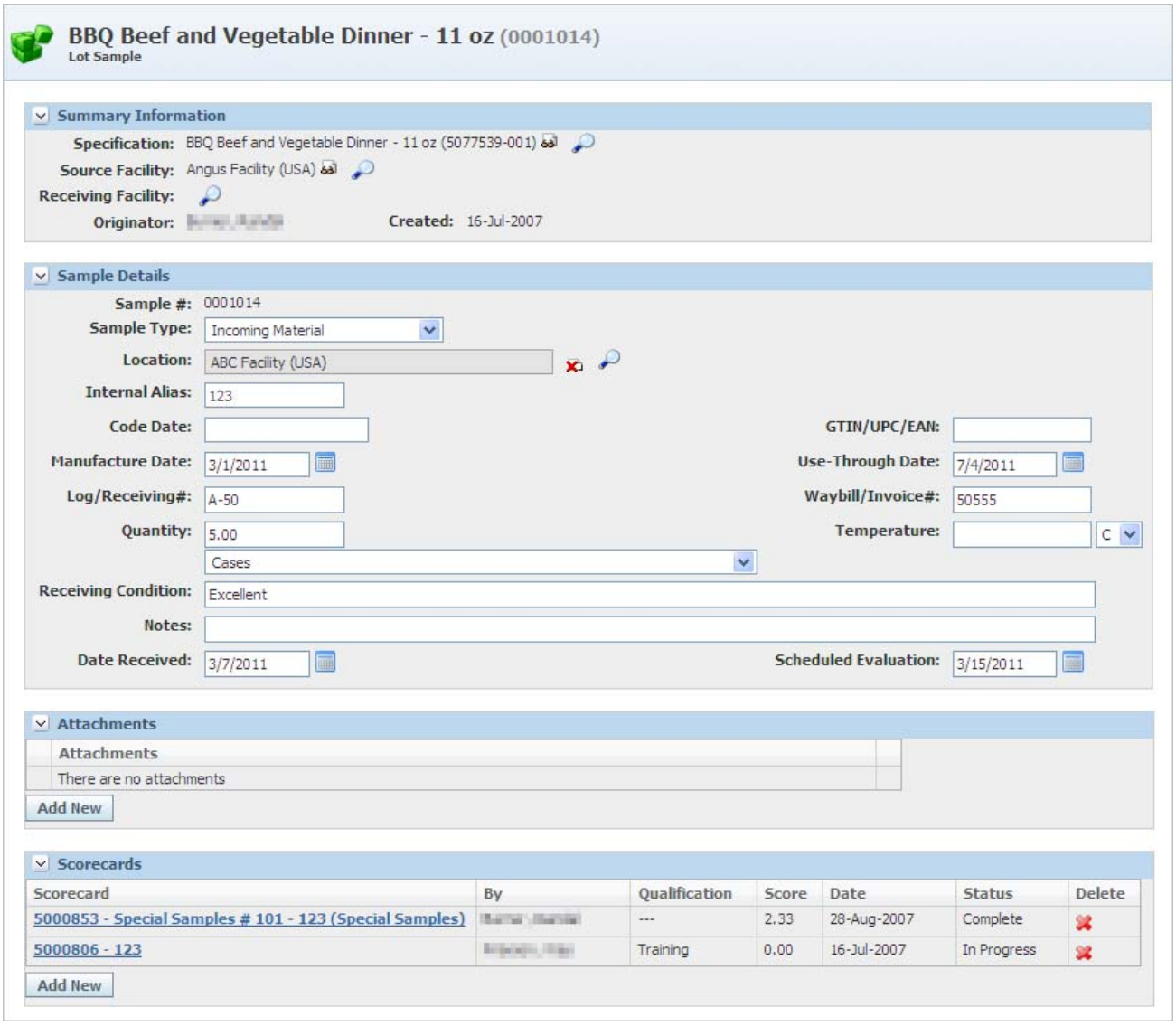
Refer to "Searching for a Session" on page 2-8 for more information on searching.

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.

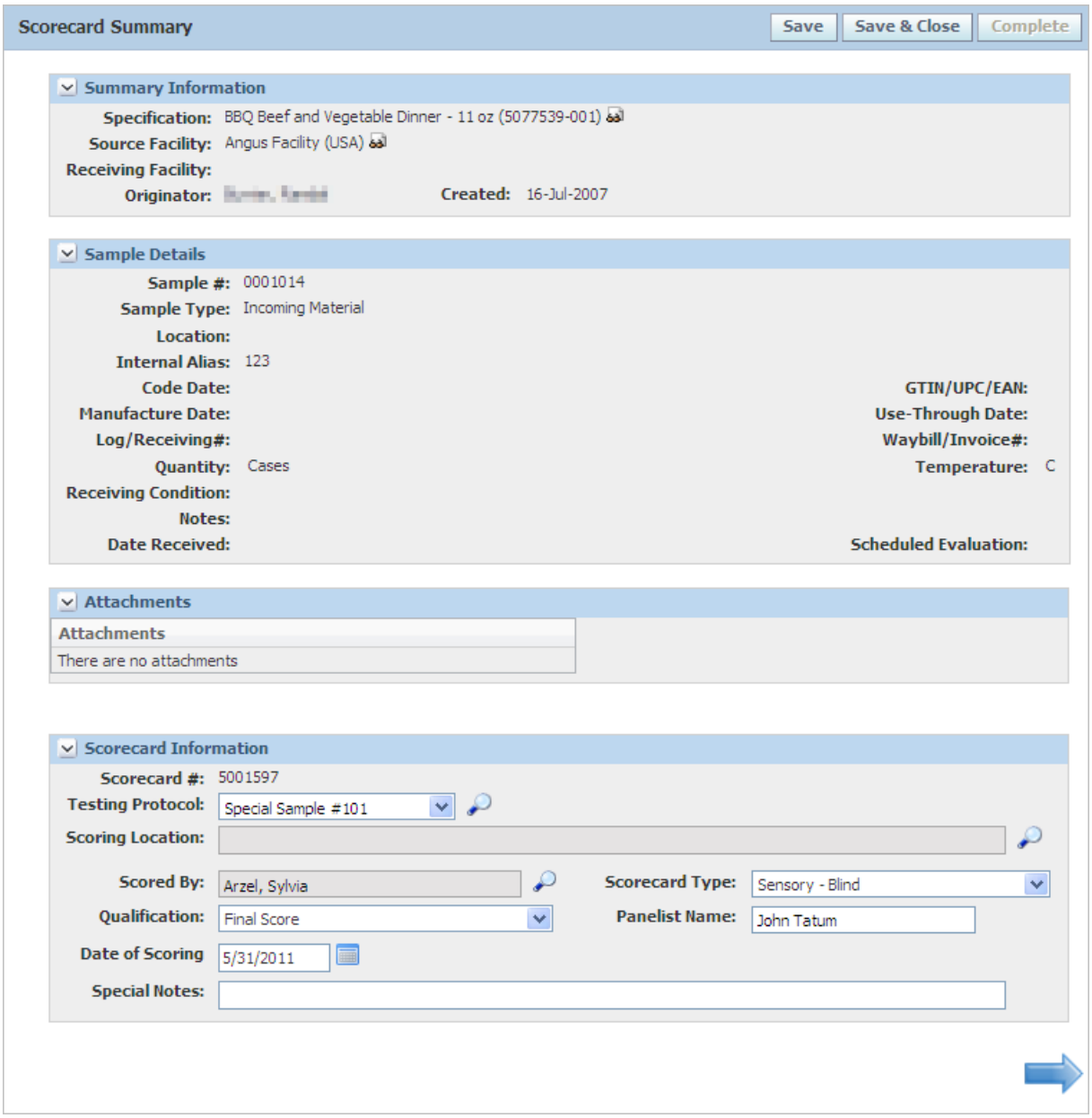
Figure 2–12 shows the Sample Summary page of the selected sample.

Figure 2–12 Sample Summary for selected sample



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



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*.