Oracle® Agile Product Lifecycle Management for Process

eQuestionnaire User Guide

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Oracle Agile Product Lifecycle Management for Process eQuestionnaire User Guide, Release 6.2.4.x

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Contents

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
- Software Availability
- 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

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Software Availability

Oracle Software Delivery Cloud (OSDC) provides the latest copy of the core software. Note the core software does not include all patches and hot fixes. Access OSDC at:

http://edelivery.oracle.com.

Related Documents

For more information, see the following documents in the Oracle Agile PLM for Process 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 Supplier Portal User Guide*
- *Agile Product Lifecycle Management for Process Getting Started Guide*
- *Agile Product Lifecycle Management for Process User Group Management User Guide*
- *Agile Product Lifecycle Management for Process Workflow Administration User Guide*
- *Agile Product Lifecycle Management for Process Configuration 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:

  https://www.oracle.com/technical-resources/documentation/agile.html#plmprocess

Conventions

The following text conventions are used in this document:

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

Introducing eQuestionnaire

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

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.

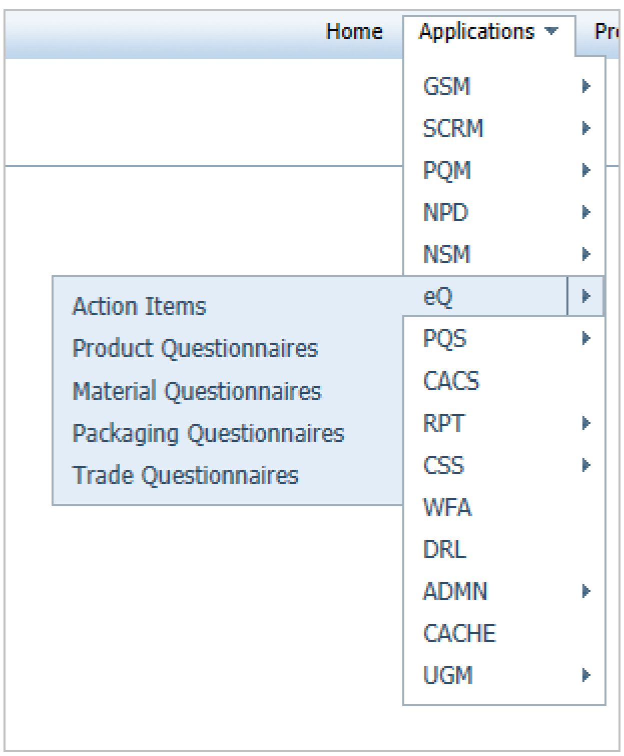
Getting Started with eQuestionnaire

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.

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Working with Questionnaires

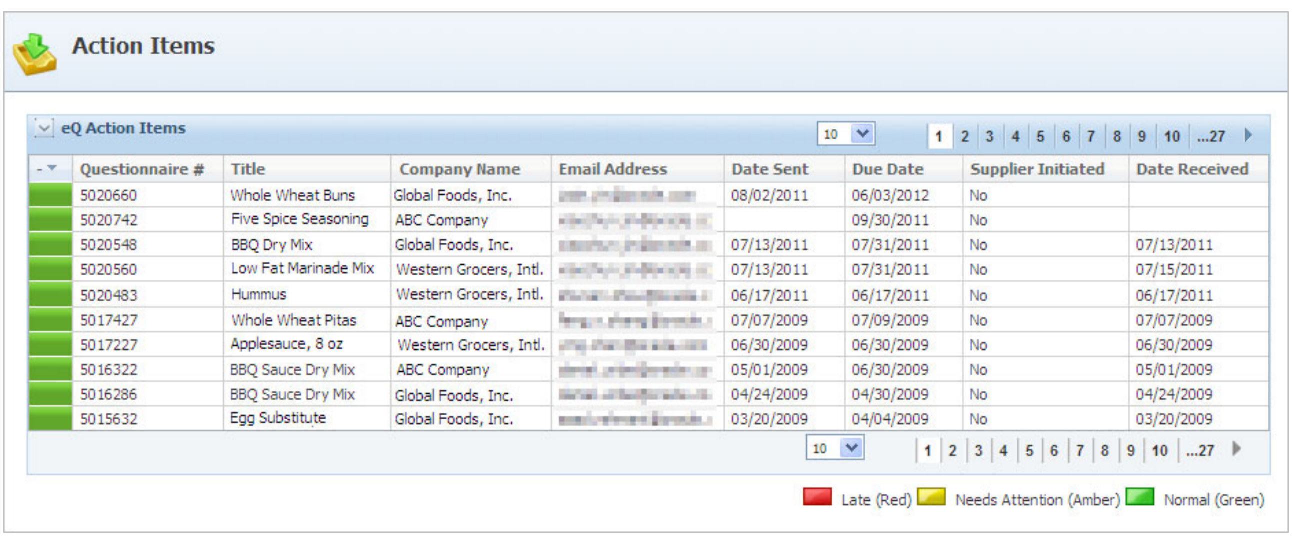
This chapter describes how to use eQuestionnaire (eQ) to solicit and integrate data provided by suppliers.

Topics in this chapter include:

Action Items

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.		08/02/2011	06/03/2012	No	
5020742	Five Spice Seasoning	ABC Company			09/30/2011	No	
5020548	BBQ Dry Mix	Global Foods, Inc.		07/13/2011	07/31/2011	No	07/13/2011
5020560	Low Fat Marinade Mix	Western Grocers, Intl.		07/13/2011	07/31/2011	No	07/15/2011
5020483	Hummus	Western Grocers, Intl.		06/17/2011	06/17/2011	No	06/17/2011
5017427	Whole Wheat Pitas	ABC Company		07/07/2009	07/09/2009	No	07/07/2009
5017227	Applesauce, 8 oz	Western Grocers, Intl.		06/30/2009	06/30/2009	No	06/30/2009
5016322	BBQ Sauce Dry Mix	ABC Company		05/01/2009	06/30/2009	No	05/01/2009
5016286	BBQ Sauce Dry Mix	Global Foods, Inc.		04/24/2009	04/30/2009	No	04/24/2009
5015632	Egg Substitute	Global Foods, Inc.		03/20/2009	04/04/2009	No	03/20/2009

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 green.
- On August 15, 16, and 17, the symbol will be amber.
- On August 18 or later, the symbol will be red.

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, 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.

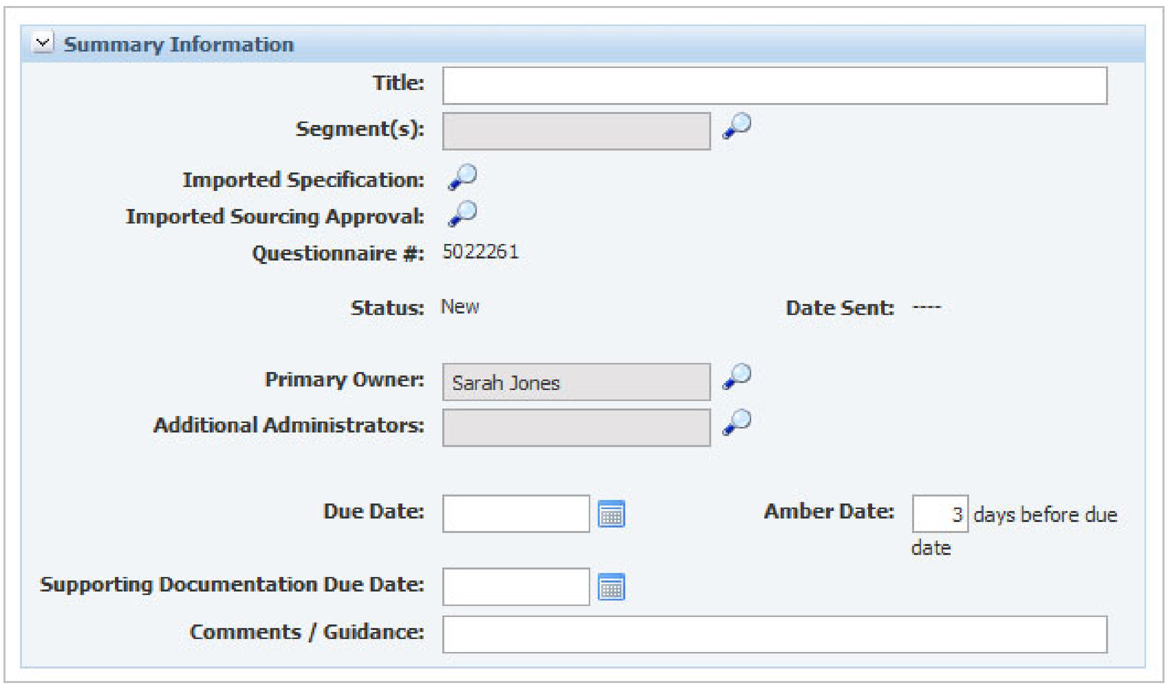
You can also create a questionnaire by clicking the create new icon from the search page.

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



Key fields include:

- **Title**—The name of the questionnaire. It can be the name of the imported specification or sourcing approval, 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 2-17 for more information.
- **Segments**—The business segment assigned to the document. This is a required field, and does affect visibility.
- **Imported Specification**—For information on importing a specification, refer to "Importing a Specification" on page 2-5.
- **Imported Sourcing Approval**—For more information on importing a sourcing approval, refer to "Importing a Sourcing Approval" 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**
  - **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.
  - **Retracted**—The questionnaire has been retracted by the eQ administrator. Use this status when you want to retract a questionnaire from a supplier. Once a questionnaire is retracted, the supplier is no longer be able to interact with it and any data entered will be lost.
  - **Archived**—The questionnaire has been archived by an eQ administrator. This questionnaire no longer appears in the user's action items.
- **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 User Group Management 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.

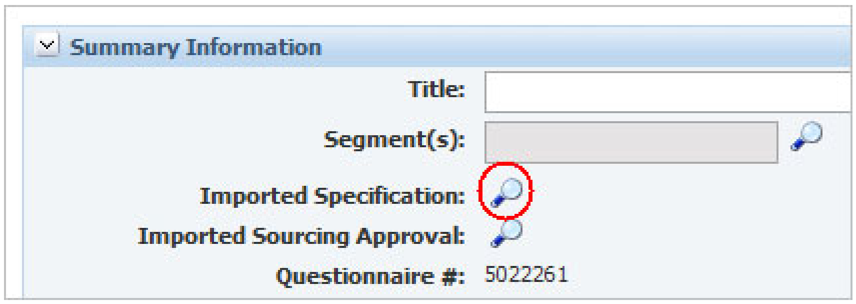
  If eQ security is configured on, only the primary owner and those users defined in the Additional Administrators field have access to the questionnaire. If eQ security is configured off, all users with access to the eQuestionnaire application have access to the questionnaire. The user creating the questionnaire is 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 is 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. The default is 3.

- **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

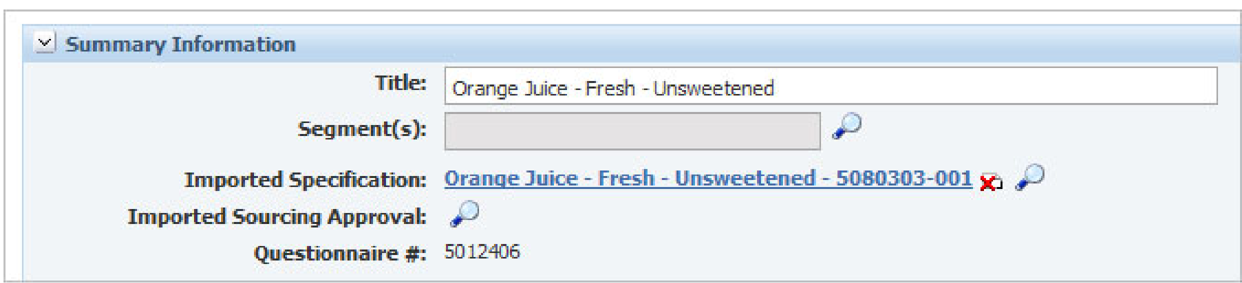
By default, questionnaires that are created are sent to the supplier blank. If you want the supplier to review data that exists on a specification, you can leverage that specification to create a questionnaire. To select a specification to import, click the search icon, as Figure 2–3 shows.

Figure 2–3 Importing a specification's data



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 is displayed in the delivered questionnaire. In addition, the specification's name populates the Questionnaire Label field, as Figure 2–4 shows.

Figure 2–4 Imported specification populates questionnaire

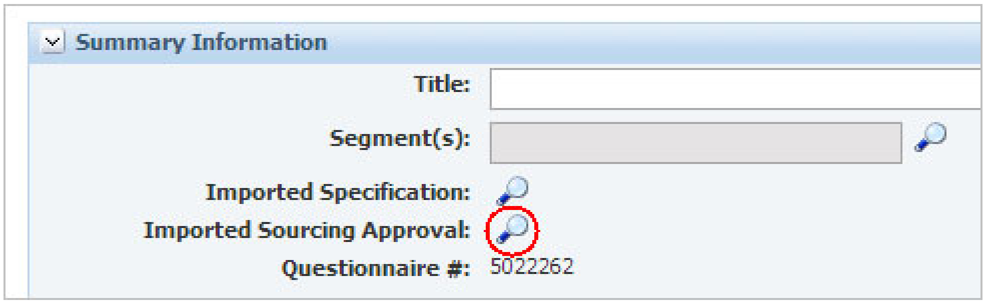


You can view the imported specification in a dialog box by clicking the linked specification name in the Imported Specification field. This allows you to review the specification you selected. You can change the imported specification by selecting the search icon again, or clear the imported specification by clicking the clear icon next to the link.

Importing a Sourcing Approval

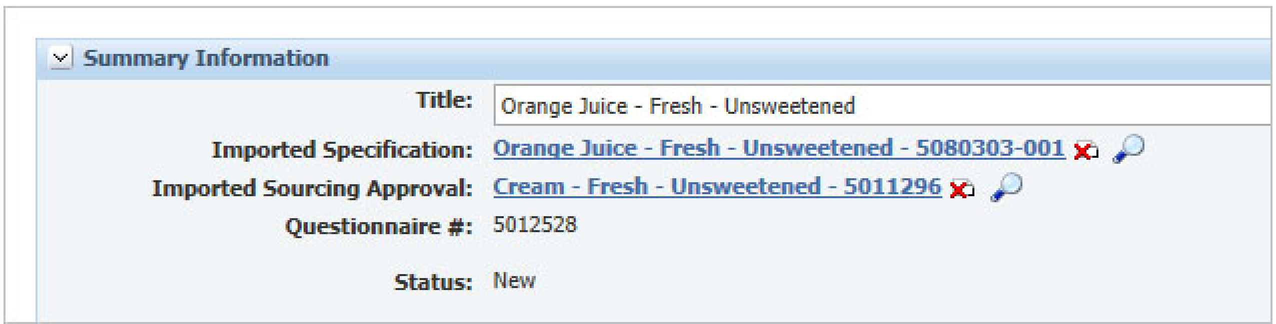
By default, questionnaires that are created are sent to the supplier blank. If you want the supplier to review data that exists on a sourcing approval, you can leverage that sourcing approval to create a questionnaire. To select a sourcing approval to import, click the search icon, as Figure 2–3 shows.

Figure 2–5 Importing a sourcing approval's data



A search page is displayed in which you can search and select the desired sourcing approval. Once you have selected the sourcing approval, data from the sourcing approval displays in the delivered questionnaire. In addition, the sourcing approval's name populates the Questionnaire Label field, as Figure 2–4 shows.

Figure 2–6 Imported sourcing approval populates questionnaire

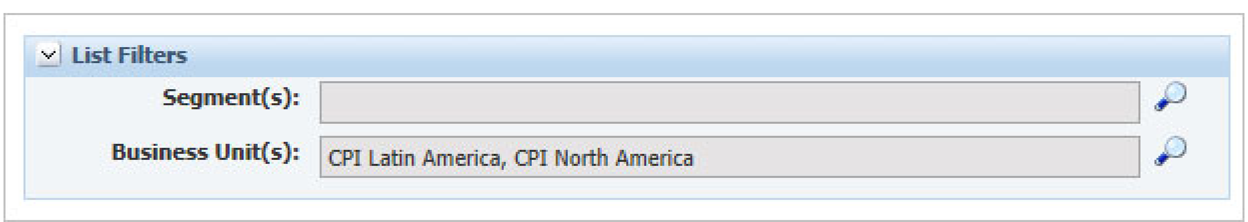


You can view the imported sourcing approval in a dialog box by clicking the linked sourcing approval name in the Imported Sourcing Approval field. This allows you to review the sourcing approval you selected. You can change the imported sourcing approval by selecting the search icon again, or clear the imported sourcing approval by clicking the clear icon next to the link.

List Filtering Section

This section displays filters for the questionnaire. If a specification is imported, the specification's filters are displayed here.

Figure 2–7 List Filtering section



Segments—The business segment assigned to the questionnaire. If a specification is imported, the specification's segments are displayed.

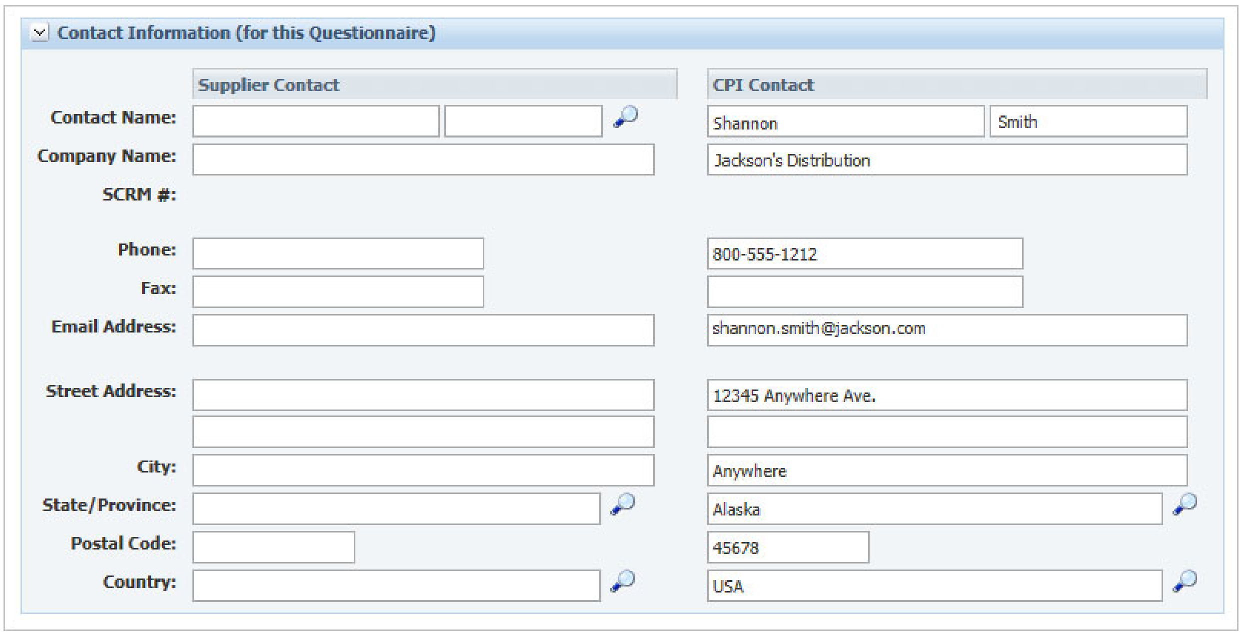
Business Units—The business unit assigned to the questionnaire. If a specification is imported, the specification's business units are displayed.

The eQ administrator can change these values. When done, the override icon and refresh icon appear next to the field. If you click the refresh icon, the values change back to those from the imported specification and the override icon and refresh icon disappear. If you click the clear icon next to the imported specification, the values in the segment and BU field do not change but the override icon and refresh icon disappear.

Contact Information Section

This section contains contact information for the supplier as well as your company, as Figure 2–8 shows.

Figure 2–8 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. When sending the questionnaire, required fields are: Contact Name and Email Address.

Company (CPI) Contact—This is the area to designate the questionnaire sender's information. This information defaults to the originator's contact information, and is the contact information provided to the supplier on the questionnaire. When sending the questionnaire, required fields are: Contact Name, Company Name, Phone, Street Address, City, State/Province, and Country.

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.

You can now set a default for the sender company. When an eQ is created a default string is inserted into the field. The out of the box default is the user's facility name as defined in the user profile, but you can change it using the following configuration:

```
<add key="eQ.SenderCompany.Default"
```

If set to 'UserProfileFacility', the default, the field will be populated with the UGM User profile facility. Otherwise the value will be used as a translation label retrieved from the 'EQService/Miscellaneous' cache.

Completing Contact Information

To fill out contact information, manually add the information, or you can use the search icon to select a contact name.

1. To select a contact tied to a company click the search icon displayed after the Contact Name field. 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.

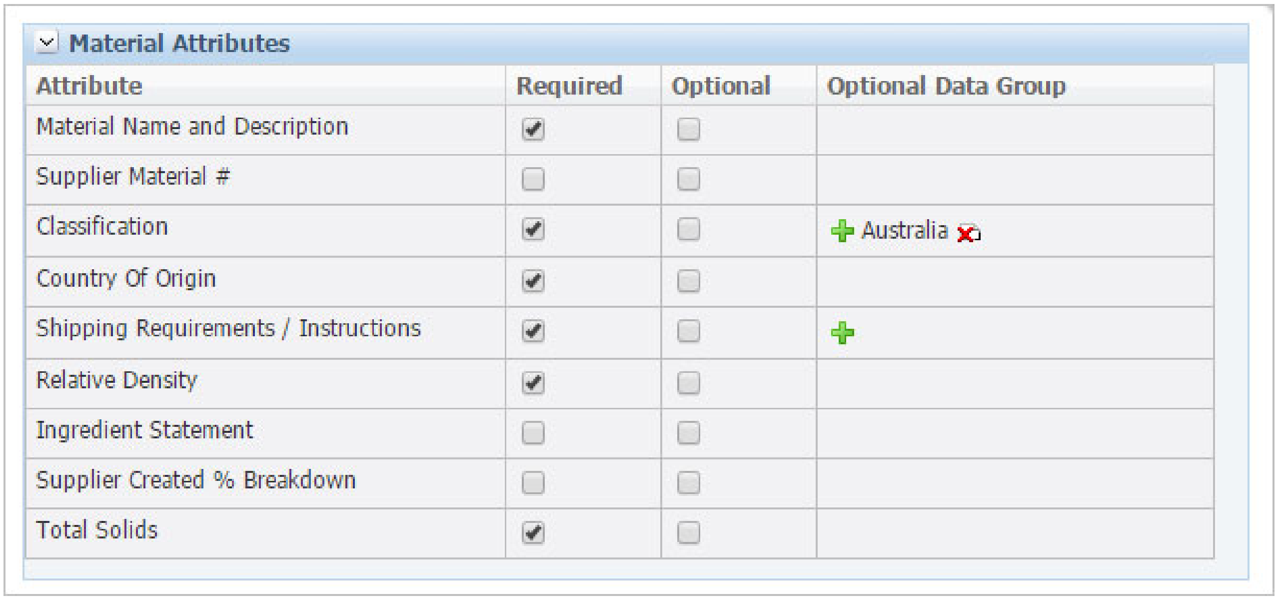
If manually entering contact information, you can use the search icons to select state/province or country.

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. For example, you can use a questionnaire to gather sourcing approval information from your suppliers, or for a material questionnaire, request tare weight. The information you request can include documentation as well as custom data. Figure 2–9 shows a portion of the Edit Questionnaire section of a material questionnaire.

The grid contains every list that could be filtered by data groups. You can select multiple data groups that will apply. Click each data group to preview the contents of the group. Once a group is selected, only data that is filtered by the selected group will list for supplier to choose from when completing the eQ.

Figure 2–9 Material questionnaire, Edit Questionnaire section



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 is not included in the questionnaire. If optional is selected, the attribute is included in the questionnaire, but the supplier is not required to provide the information. If required is selected, the supplier is forced to fill the field out before submitting the questionnaire.

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

Supplier Material # 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 is automatically checked as required.

For more information about multiple breakdown support in eQ, see "%Breakdowns on the Specification" on page 2-10.

Trade Packaging Attributes This section lists packaging attributes for trade specifications.

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 are listed. The breakdowns you select as optional or required are 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.
- **Supplier Created**—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. Check the Enabled field, then the add data icon in the Optional Data Group column. eQ displays a dialog box, from which you select the data group.

  For example, if you want a North American supplier to add the compliance items that a material complies with, you might add a group called “North America” to the “Compliance (Supplier Created)” 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.
- **may contain**—Enables the supplier to confirm “may contain**”** data for allergens, intolerances, and additives linked to the specification.
- **free text**—Enables the supplier to enter free text to further define attributes.
- **Supplier Created**—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. Check the Enabled field, then the add data icon in the Optional Data Group column. eQ displays a dialog box, from which you select the data group.

  For example, if you want a North American supplier to add the compliance items that a material complies with, you might add a group called “North America” to the “Compliance (Supplier Created)” table. The North America group would only contain the complies with items that pertain to the north american region.

Sourcing Approval Extended Attributes This section allows the supplier to provide extended attributes tied to the selected sourcing approval.

Sourcing Approval Custom Sections This section allows the supplier to provide custom sections tied to the selected sourcing approval.

Extended Attributes This section displays extended attributes for the specification. Extended attributes define important features and characteristics of the specification or sourcing approval. Certain roles are needed to add and delete extended attributes. See Appendix A of the *Agile Product Lifecycle Management for Process User Group Management User Guide* for a list of roles.

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

- **Supplier Created**—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. Check the Enabled field, then the add data icon in the Optional Data Group column. eQ displays a dialog box, from which you select the data group.

  For example, if you want a North American supplier to add the compliance items that a material complies with, you might add a group called “North America” to the “Compliance (Supplier Created)” table. The North America group would only contain the complies with items that pertain to the north american region.

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

Documents This section lists supporting documents for the specification or sourcing approval.

DRL Documents This section lists DRL (Document Reference Library) documents linked to the specification or sourcing approval.

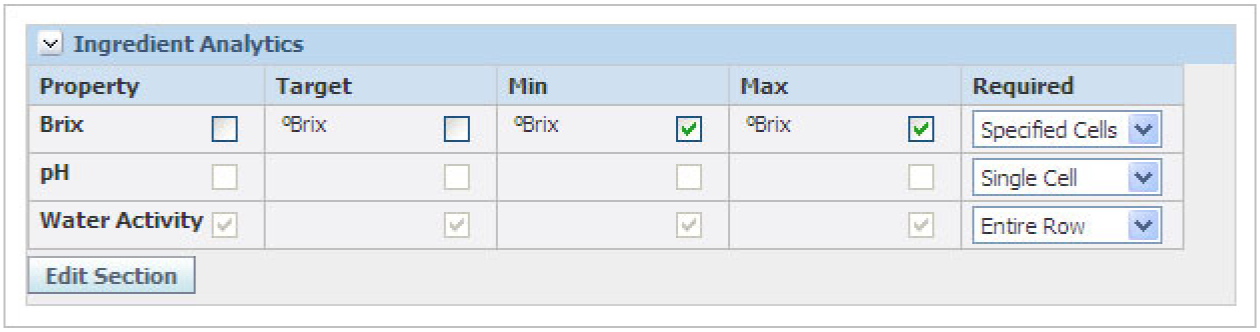
Comments This section allows the supplier to provide comments.

Manage 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 User Group Management 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 2–10 shows.

Figure 2–10 Defining required cells

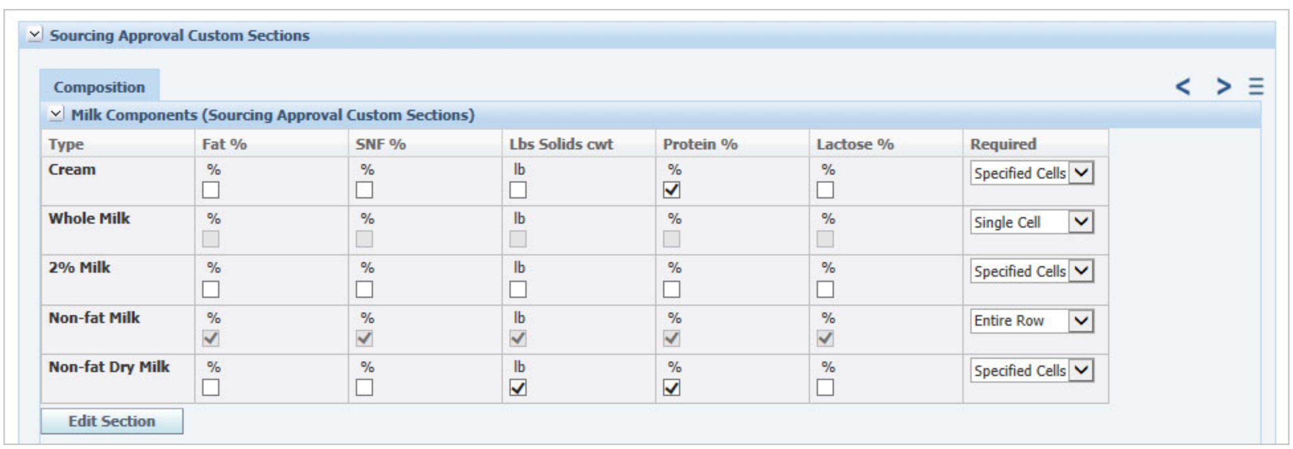


The drop-down options are defined as follows:

- **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.

When you click **Edit Section**, eQ displays additional buttons under the custom section, as Figure 2–11 shows.

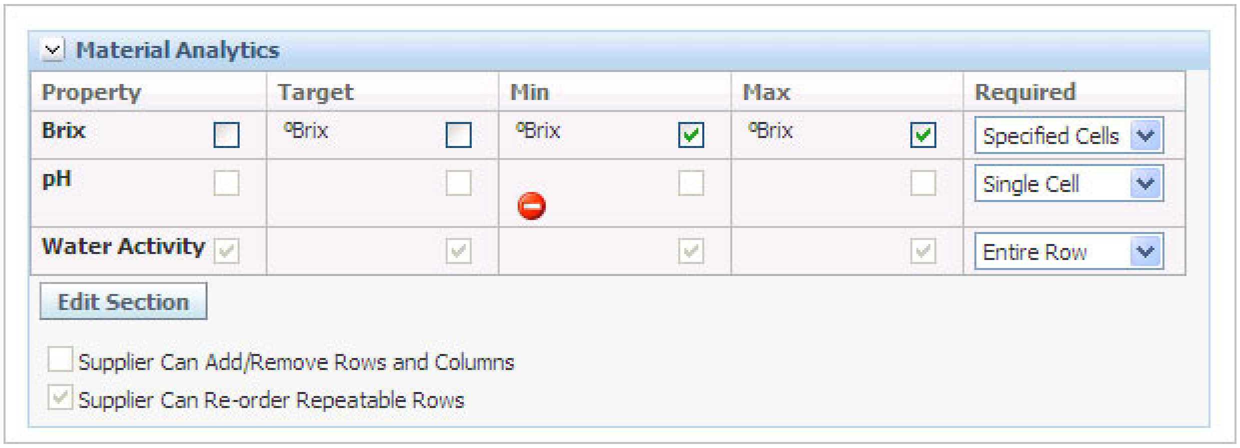
Figure 2–11 Section in edit mode



- **Supplier Can Add/Remove Rows and Columns**—When selected, the supplier is able add and remove columns or rows that are tagged with “Supplier eQ - Create”. Tags are added to custom section rows and columns in the ADMN application.
- **Supplier Can Re-order Repeatable Rows**—When this is selected, suppliers are allowed to re-order repeatable rows. Repeatable rows are those with the “Repeatable” tag. This is recommended if the supplier is able to add and remove repeatable rows.

Extended attributes marked as 'Do Not Publish To Supplier' are indicated with the do not publish to supplier icon, as shown in Figure 2–12. Suppliers can not see these extended attributes when viewing the questionnaire.

Figure 2–12 Do not publish to supplier icon



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. This option is available with the questionnaire in edit or read mode.

If any required fields have not been completed, the relevant error messages display at the top of the page and the questionnaire is not sent. If completed correctly, the questionnaire closes and the status changes to “Sent.”

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

The supplier receives an email indicating that there is an eQuestionnaire to complete. The supplier’s email address is the user ID 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.

Multi-Language Support

Agile PLM supports multi-language questionnaires. The supplier selects a language when opening the eQ. For example, if the supplier selects traditional Chinese when logging into the eQ, the specification is displayed in traditional Chinese.

Key Point: The specification itself must have Chinese values on it. For example, if the user created a specification in English and provided a Chinese specification name, when the supplier logs into eQ using Chinese he will see the Chinese specification name. If the specification name did not have a Chinese value then the supplier sees the English specification name.

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 2-14.

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 is presented with a Supplier Actions icon in Supplier Portal. When the supplier chooses **Submit Changes** in the Supplier Actions dialog box, a questionnaire is created. This process imports all specification and template data. Specification are required or optional depending on a system configuration.

Figure 2–13 Supplier action icon in Supplier Portal

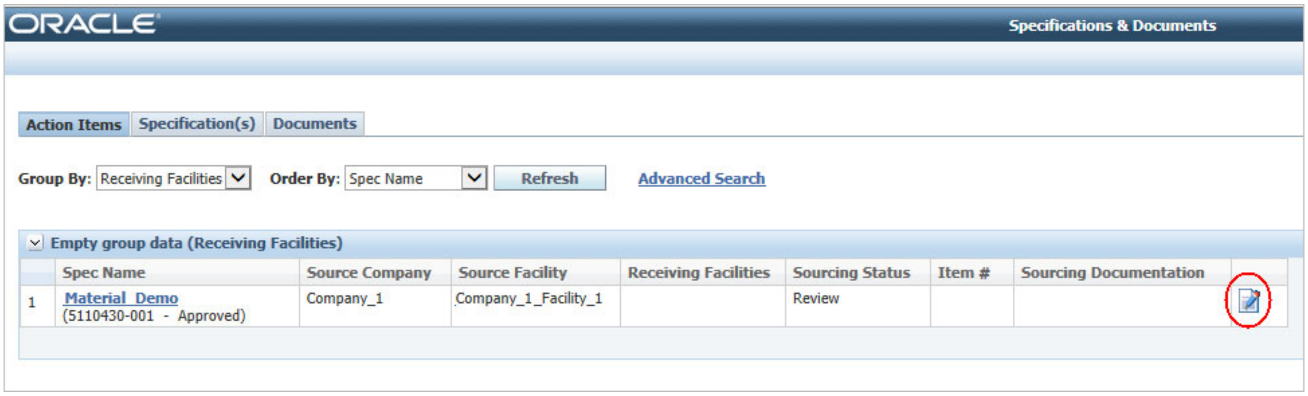
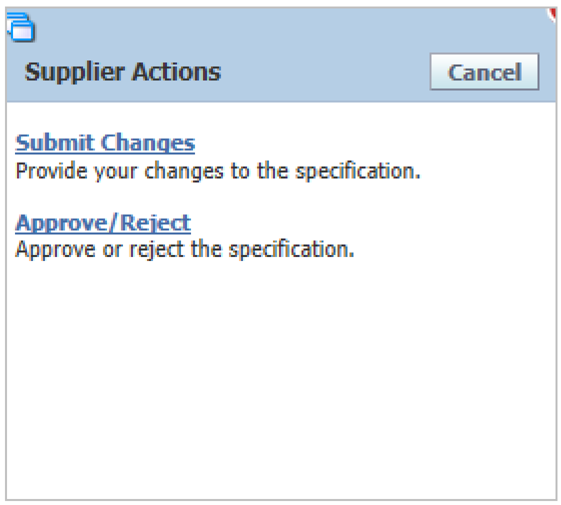


Figure 2–14 Supplier Actions



A supplier initiated template should be created to act as the base for the supplier initiated questionnaire. In combination with the imported specification, this template helps 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.).

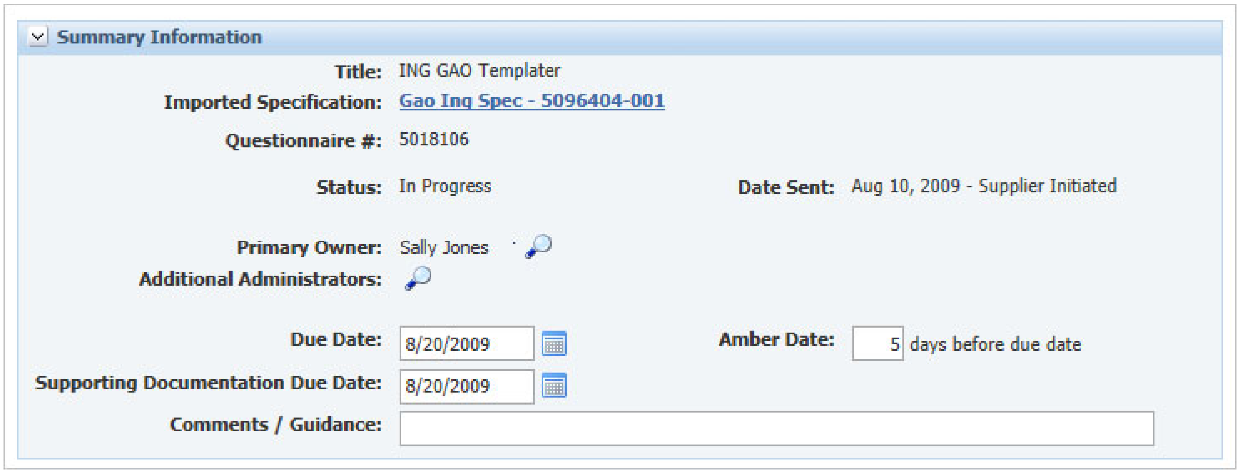
eQ Administrator View

The questionnaire initiated by the supplier is presented in the eQ owner's Action Items as if they manually created the questionnaire. Once the supplier submits the questionnaire, the eQ administrator is able to push the changes into GSM.

A few things help the eQ administrator understand if a questionnaire was supplier initiated:

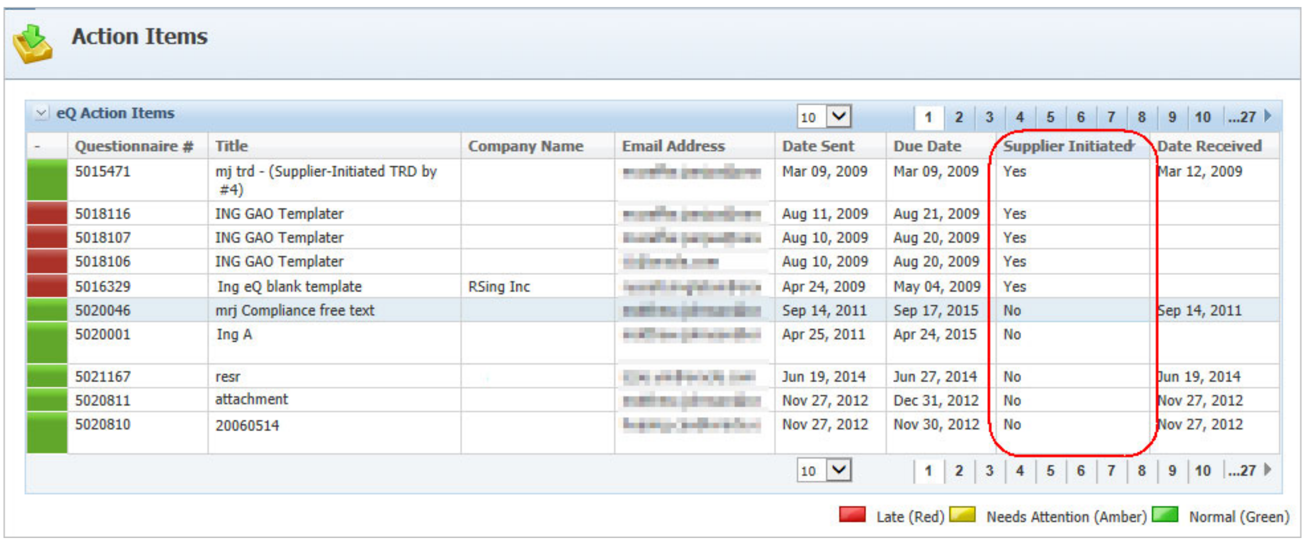
1. A flag of Supplier Initiated is visible on the eQ, next to the Date Sent field.

Figure 2–15 Date Sent field



2. A sortable supplier initiated column is included in the eQ action items listing.

Figure 2–16 Supplier Initiated column



3. Supplier Initiated is included as questionnaire search criteria and as a column in the search results.

Configuring Supplier Initiated Questionnaires

1. Feature Configuration

A primary configuration to turn this feature on and off is available. By default this configuration is set to True. To turn off the feature change this value to “false”.

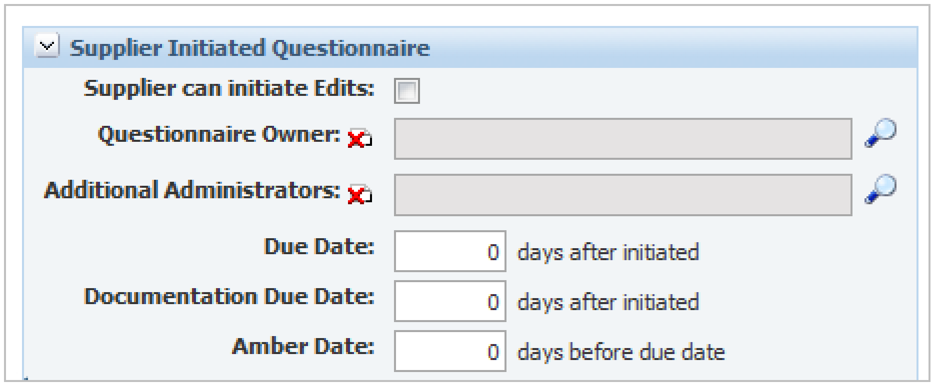
```
<add key="EQ.SupplierInitiatedQuestionaire.Enabled"
value="true"/>
```

2. Sourcing Approval

The sourcing approval and specification workflow control when a specification is published to Supplier Portal. For more information about this see the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.

The Supplier Initiated Questionnaire section is available on the Summary tab of the specification-related sourcing approval. Use this section to grant access to a supplier to submit changes. This section is only applicable on sourcing approvals tied to specifications supported in eQ. For example, on sourcing approvals tied to equipment specifications or non co-pack trade specifications this section is not supported.

Figure 2–17 Supplier Initiated Questionnaire section



The fields are defined below:

- **Supplier can initiate edits**—This selection controls whether the supplier can initiate edits to the specification. If selected, the supplier sees the Submit Changes button in the specification listing in Supplier Portal.
- **Questionnaire owner**—This field initiates a single select UGM user EQT. The UGM user selected here is set as the owner of the questionnaire.
- **Additional Administrators**—This field initiates the multi-select UGM user and group EQT. The UGM groups or users selected are set as the additional administrators of the questionnaire.
- **Due Date**—Number of days after supplier initiates questionnaire that it is due. The default is 10 days.
- **Documentation Due Date**—Number of days after supplier initiates questionnaire that the supporting documentation is due. The default is 10 days.
- **Amber Date**—Number of days before due date that you want the date to switch to amber. The default is 5 days.

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 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 is replaced as:

5088888-001 – Some Spec Name

Figure 2–18 Variables in the Questionnaire Label field

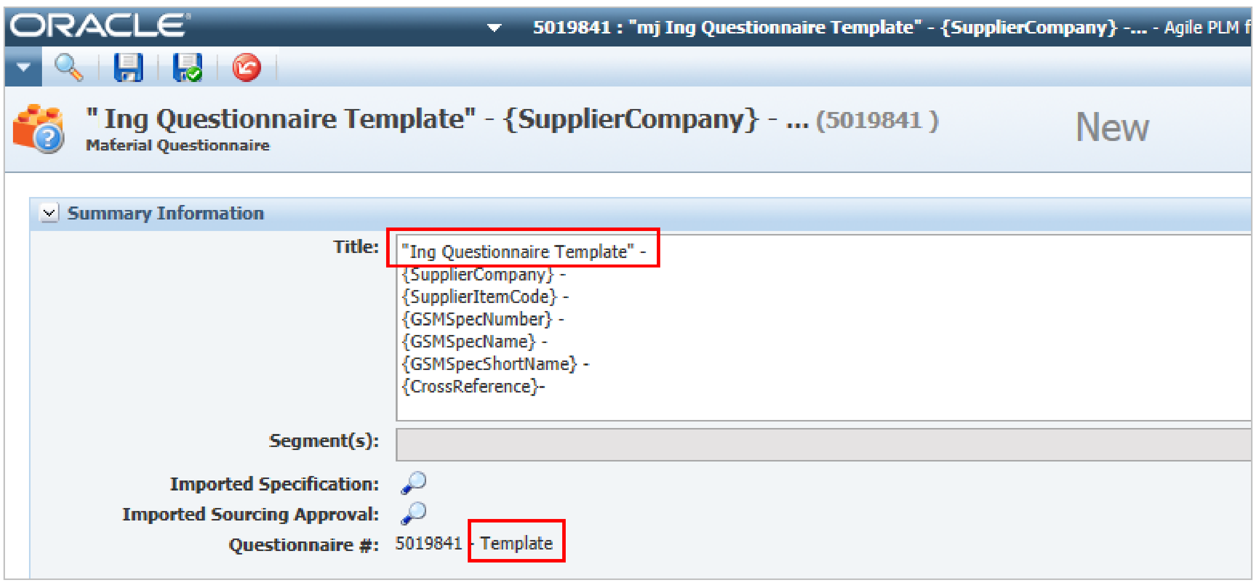
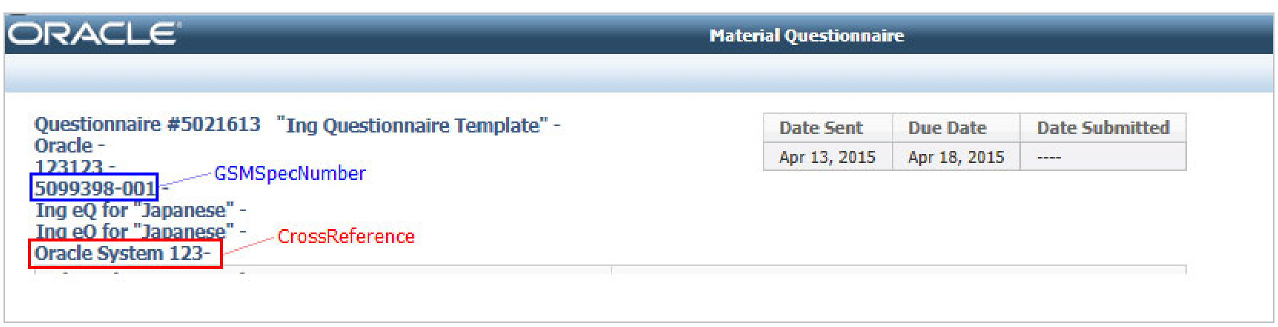


Figure 2–19 View from Supplier Portal



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 2-8 for completing the rest of the questionnaire template.

Required or Optional

There is a configuration available to set all imported specification data as required. By default, all specification data imported into the questionnaire is set to optional. If you would like to change this behavior adjust the following configuration line:

```
<add
key="EQ.SupplierInitiatedQuestionaire.EQItem.RequireSpecContents
.Enabled" value="false"/>
```

This is not applicable to custom sections. Custom section validation rules are too complex to assume. Currently all custom data is optional for supplier initiated questionnaires.

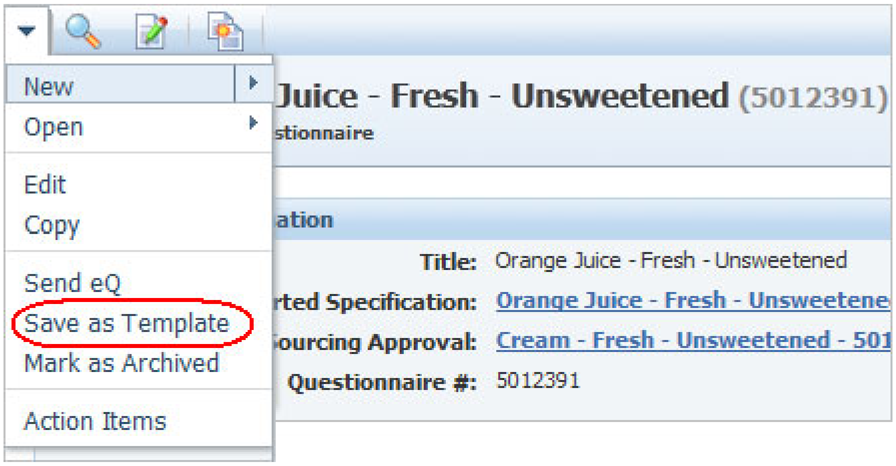
Figure 2–20 Defining data

1	Questionnaire Field	Defined By
2	Label	Specification or eQ Configurable Name variables
3	#	System Defined
4	Status	System Defined
5	Access Level	Specification
6	Primary Owner	Sourcing Approval or Template
7	Additional Administrators	Sourcing Approval + Template
8	Due Date	Sourcing Approval
9	Supporting Documentation Due Date	Sourcing Approval
10	Amber Date	Sourcing Approval
11	Comments/Guidance	Template
12	Supplier Contact Information	Supplier Portal
13	Company Contact Information	Sourcing Approval or Template
14		
15	Questionnaire Items	
16	Attributes (Ing/Prod/Trd-Nutp/Pkg/PPkg)	Specification + Template
17	% Breakdown	Specification
18	Supplier Created %Breakdown	Template
19	Shelf Life	Specification + Template
20	Compliance	Specification + Template
21	Compliance (User Group Selection)	Template
22	Compliances (Free Text)	Template
23	Allergens, Intolerances, Additives	Specification + Template
24	Allergens, Intolerances, Additives (Max/100g - Source)	Specification + Template
25	Allergens, Intolerances, Additives (User Group Selection)	Template
26	Allergens, Intolerances, Additives (Free Text)	Template
27	Analytical Properties	Specification + Template
28	Extended Attributes	Specification + Template
29	Nutrient Properties	Specification + Template
30	Nutrient Properties (User Group Selection)	Template
31	Supporting Documents	Template
32	DRL Documents	Template
33	Custom Sections	Specification + Template
34	Nutrient Profile Panel Attributes (Trade eQ)	Specification + Template
35	Supplier Item #	Sourcing Approval + Template
36	Env. Waste	Specification + Template
37	Trade Packaging Attributes	Specification + Template
38	Nutp Weight/Volume/Serving Information	Specification + Template

Saving Your Supplier-Initiated Template

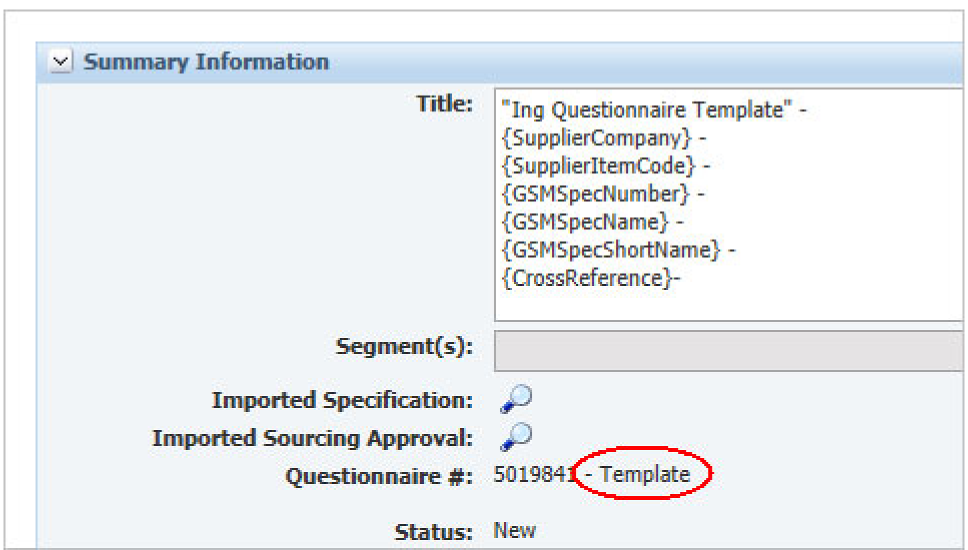
To save the questionnaire template, select **Save As Template** from the action menu, as Figure 2–21 shows. The button is available only to users with the template creation role. For saved questionnaire templates, the **Send eQ** button is not available. This button is only available in read mode. You must save and close the questionnaire before you can save it as a template.

Figure 2–21 Save As Template option



Once a questionnaire template is saved, the word "Template" displays next to the Questionnaire #, as Figure 2–22 shows.

Figure 2–22 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.

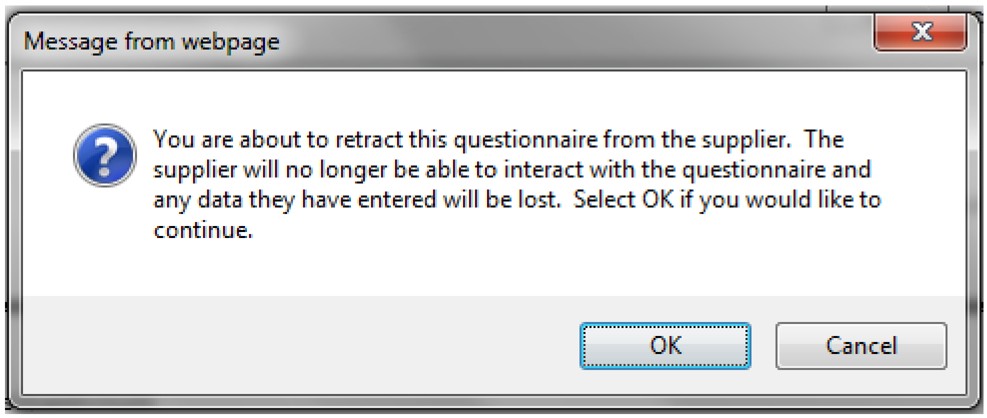
Retracting an In Process Questionnaire

An administrator can retract an in progress questionnaire and archive a new or submitted questionnaire.

To retract a questionnaire:

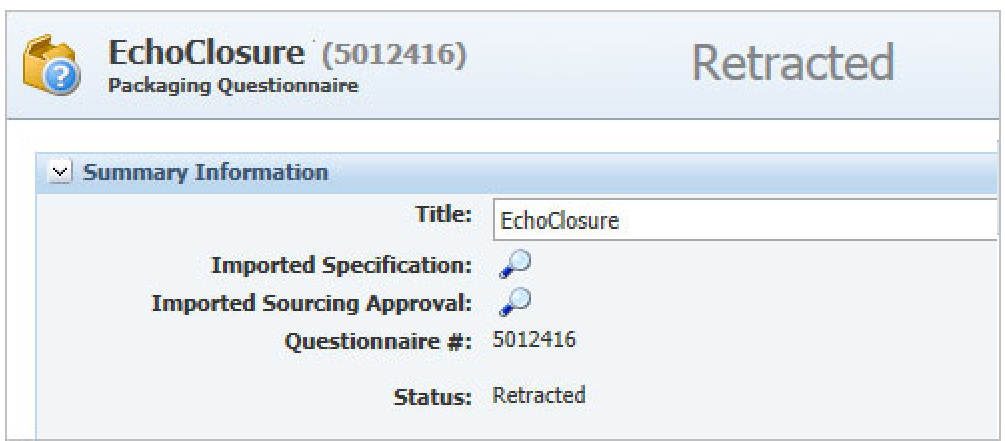
1. Select the questionnaire with the status 'In Progress'.
2. Click **Retract** from the action menu. eQ displays the following notification:

Figure 2–23 Retract notification



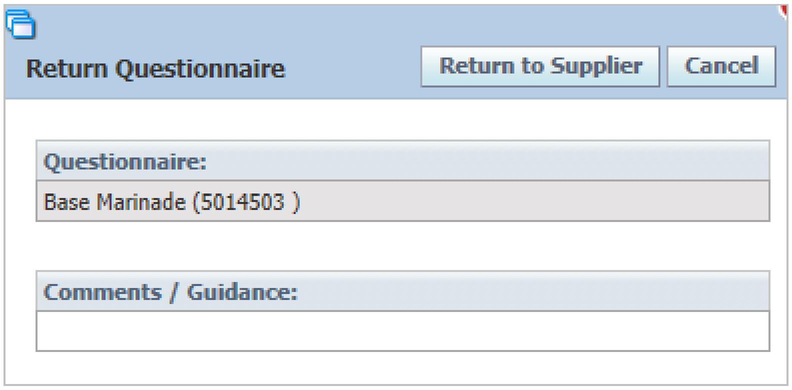
3. Select **OK** to continue.
4. The questionnaire is retracted. The status updates as shown below:

Figure 2–24 Status updated to Retracted



5. Select one of the following options from the actions menu:
   - **Mark as Archived**—eQ changes the status to Archived.
   - **Return to Supplier**—Returns the questionnaire to the supplier. Enter an explanation in the **Comments/Guidance** field in the dialog box, and then click **Return to Supplier**. eQ changes the status to In Progress.

Figure 2–25 Return to Supplier dialog box



Retracted questionnaires are included in Action Items.

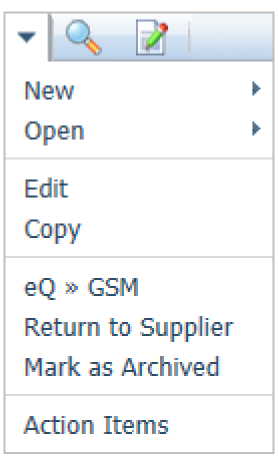
Users can now edit all the grids when an eQ is retracted. This allows users to update data that they previously entered incorrectly.

Note: When a questionnaire has been retracted, if the supplier opens the previous link sent by the system, a warning message displays: "You do not have permission to view this questionnaire."

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 2–26.

Figure 2–26 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 or sourcing approvals

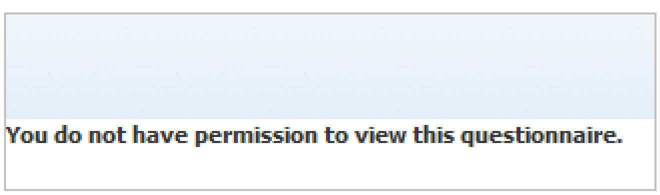
Option	Action
Create New	Creates a new specification of the same type as the questionnaire
Create New Issue	Creates a new issue of an existing specification
Update Existing	Updates an existing specification without versioning it
Create New From Template	Creates a new specification by using a specified 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 2–27) after you click **Done**.

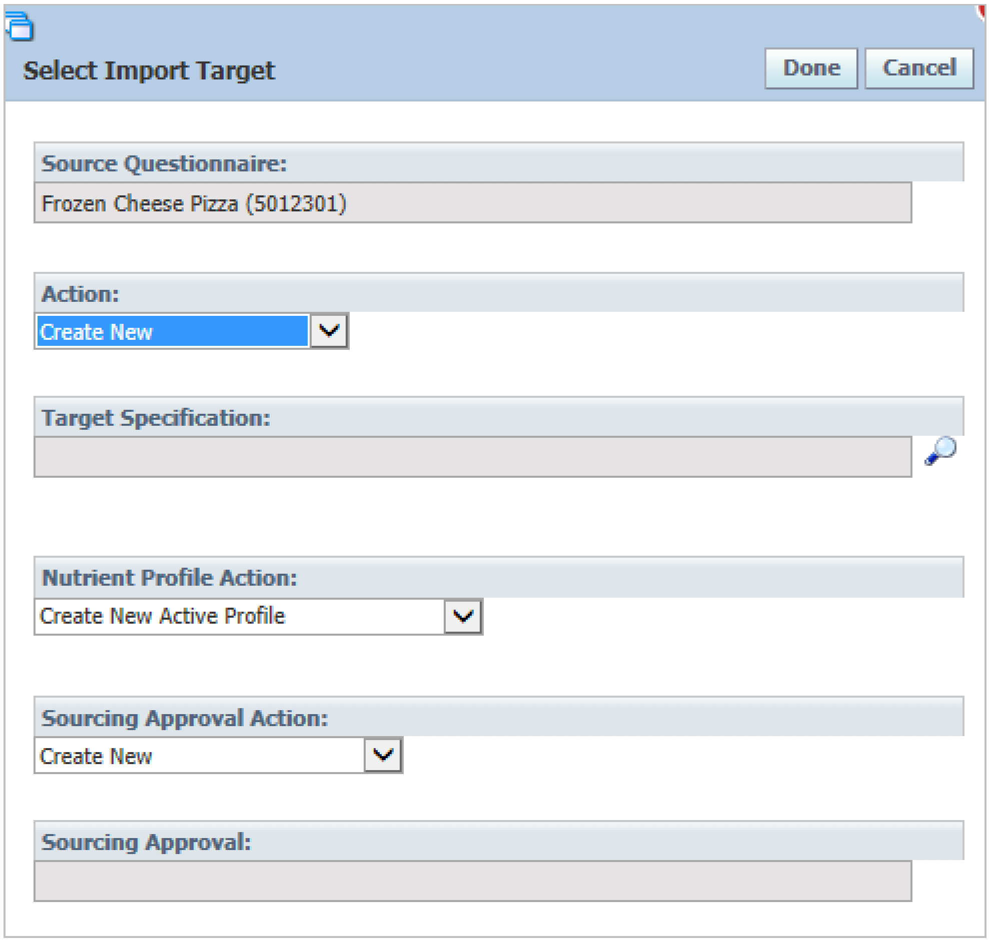
Figure 2–27 Insufficient editing permissions error message



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 2–28 shows the Nutrient Profile Action drop-down list containing nutrient profile options as well as the Sourcing Approval Action drop-down containing sourcing approval actions.

Figure 2–28 Imported trade specification, options



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 is 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.

> **Note:** When a Trade eQ is pushed into GSM, the Item Type field is filled in with Consumer Unit (co-pack) which is the first one listed in the database.

Sourcing Approval Action drop-down options:

Create New—When selected, eQ creates a new sourcing approval based on the specification.

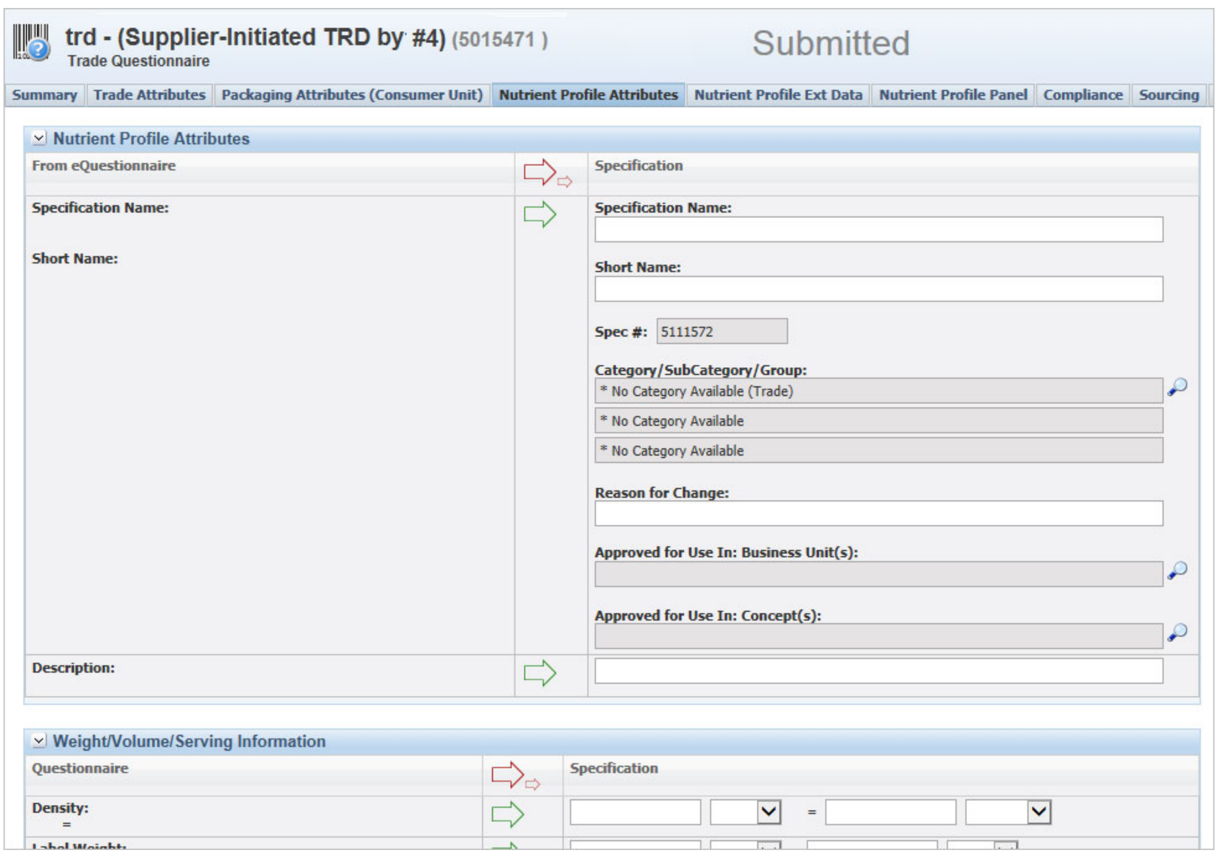
Create New from Template—When this option is selected, eQ creates a new sourcing approval based on a specified sourcing approval template.

Do Not Create Sourcing Approval—When this option is selected, the ability to push sourcing approval 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 2–29.

Figure 2–29 eQuestionnaire page, Nutrient Profile Attributes section, showing target and source for export from a questionnaire to a GSM specification



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 does 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

When a new specification is created, the specification does not automatically resolve to a workflow until it is saved from GSM. You must click **Edit Specification** which takes you to GSM where you can save the specification and resolve it to a workflow.

To avoid this, make sure to create new specifications based on a GSM template that has the workflow pre-selected.

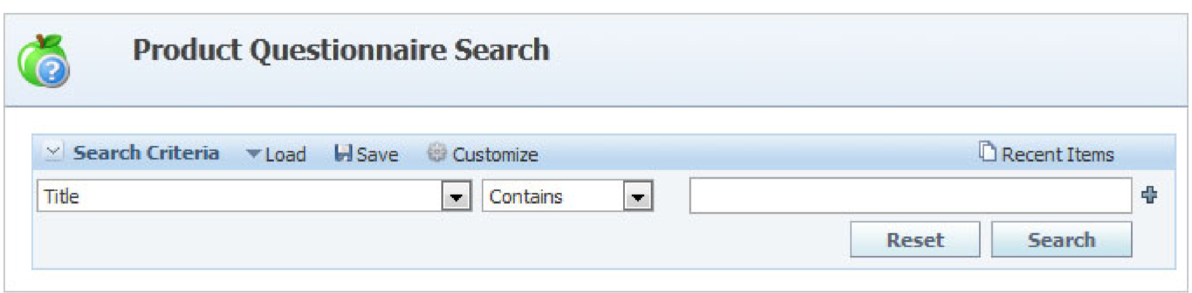
After reviewing the questionnaire, if you find that the supplier needs to provide more information, you can return the questionnaire to the supplier. To do so, click **Return to Supplier**. eQ displays a dialog box that enables you to write a message to the supplier in the Comments/Guidance field.

Once you have filled in this information, click **Return to Supplier**. eQ redisplays 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 2–30 shows.

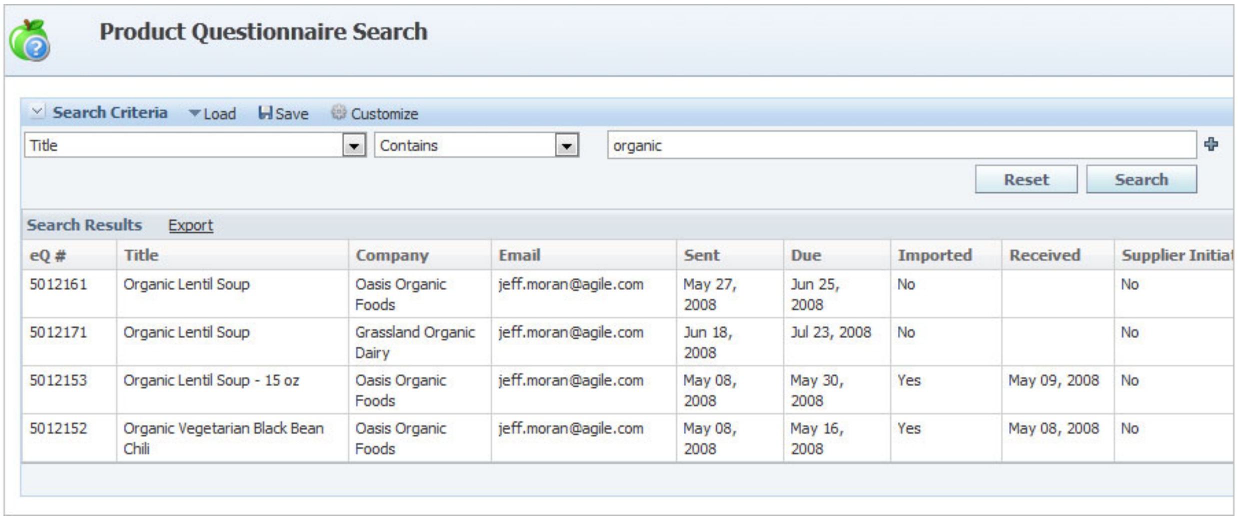
Figure 2–30 Questionnaire search page



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

The search results contain all questionnaires that match your defined search criteria, as Figure 2–31 shows. You can open only the questionnaires for which you have sufficient access permissions.

Figure 2–31 Search results



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

3

Understanding Multiple Breakdown Support

This chapter describes multiple breakdown support in eQuestionnaire (eQ). Topics in this chapter include:

What is a Breakdown?

Multiple %Breakdowns are now supported in eQ. Multiple %Breakdowns can be imported from a specification. In addition, suppliers can also create breakdowns in eQ. This is supported for material, product and trade questionnaires.

The %Breakdown represents the component composition of a material specification. %Breakdowns are stored on material and product specifications. They are also available on trade specifications typed as co-pack. For more information on the fields available, refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Why Would Multiple Breakdowns be Needed?

Multiple breakdowns are allowed on a specification. There are many reasons why multiple breakdowns may be needed; a few are listed below.

1. Different suppliers may submit varying breakdowns for the same material. They may include acceptable differences in components or amounts.
2. You may also want to provide a more generic breakdown, combining key components into general groupings. You can then hide the supplier submitted breakdowns from users that aren't allowed to see the true composition. For more information on controlling visibility of breakdowns inside GSM refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.
3. The same supplier may be submit different breakdowns for each regulatory agency (USDA, CFIA, etc)

So let's say you have the following data for a Cajun seasoning specification:

1. Supplier A Breakdown (USDA)—Associated to Facility: International Flavors

   Salt, Peppers, Onion Salt, Cayenne Pepper, Garlic Powder
2. Supplier A Breakdown (CFIA)—Associated to Facility: International Flavors

Salt, Black Pepper, Red Pepper, Onion Salt, Cayenne Pepper, Garlic Powder

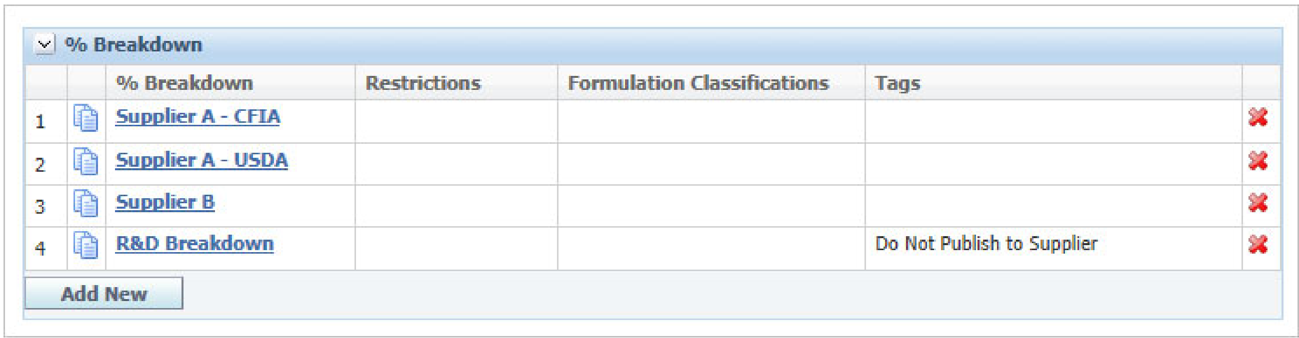
3. Supplier B Breakdown—Associated to Facility: US Seasonings

   Salt, Pepper, Onion Powder, Cayenne Pepper, Garlic Salt

4. R&D Available Breakdown—Tagged as **Do Not Publish to Supplier**

   Salt, Pepper, Special Seasonings

Figure 3–1 GSM breakdown listing



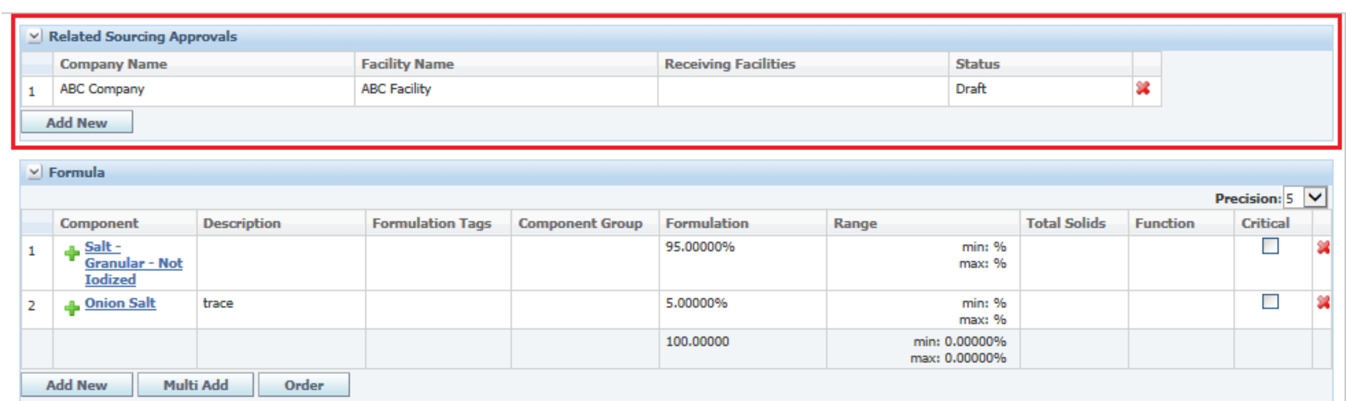
Controlling Supplier Visibility to Breakdowns

There are three areas to consider when considering supplier visibility to breakdowns: related sourcing approvals, tags, and manual interaction.

Related Sourcing Approvals

Each breakdown on the specification can be associated with a sourcing approval. This facility/company pairing controls the visibility to the breakdown in Supplier Portal and supplier initiated questionnaires. In the example above, Supplier B would not be able to see Supplier A's breakdowns.

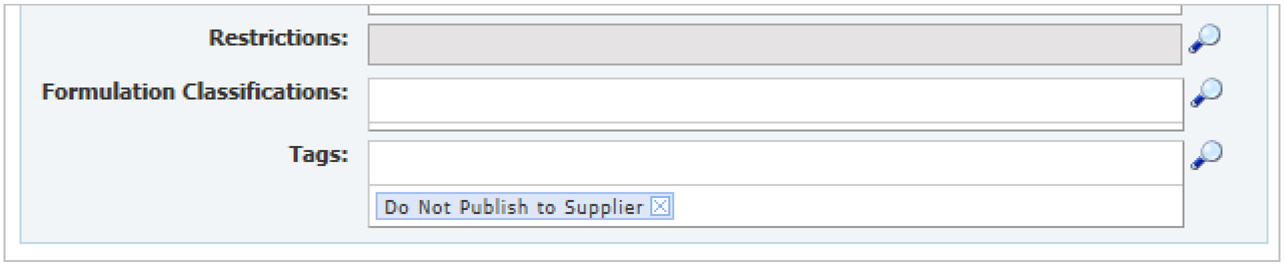
Figure 3–2 GSM %Breakdown dialog box



Tags

Breakdowns that no supplier should see (either through Supplier Portal or eQ), can be tagged with the "Do Not Publish to Supplier" tag. In the example above, no suppliers would ever see the R&D available breakdown.

Figure 3–3 GSM %Breakdown dialog box

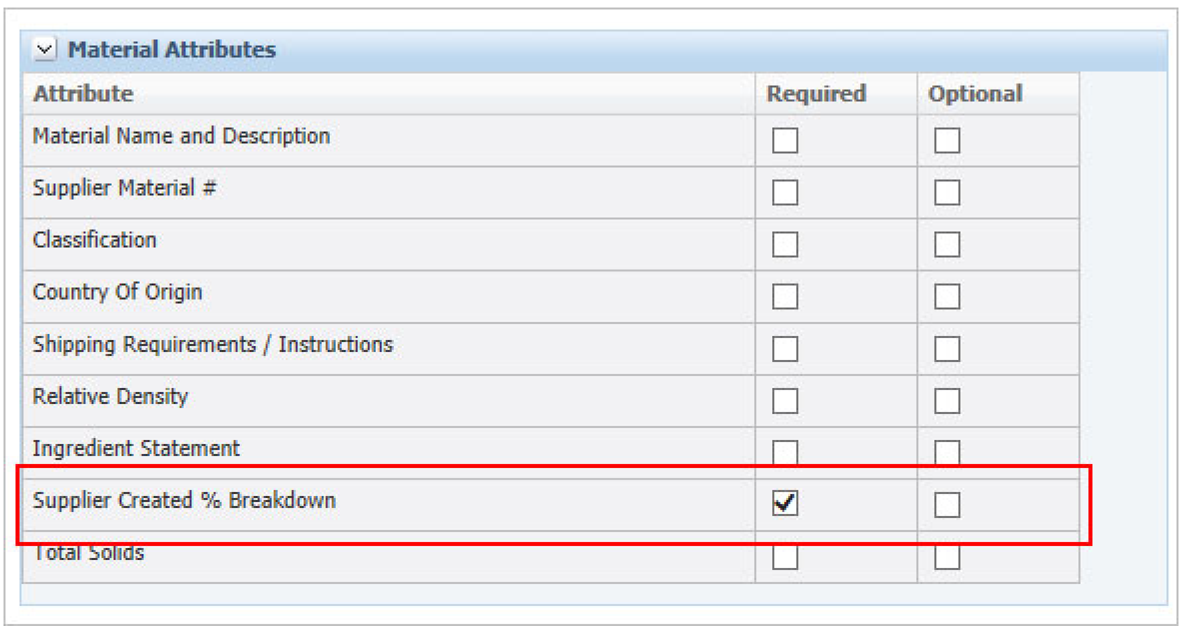


Manual Interaction

When manually creating a questionnaire, you have the option to select which breakdowns you want to include in your supplier's questionnaire.

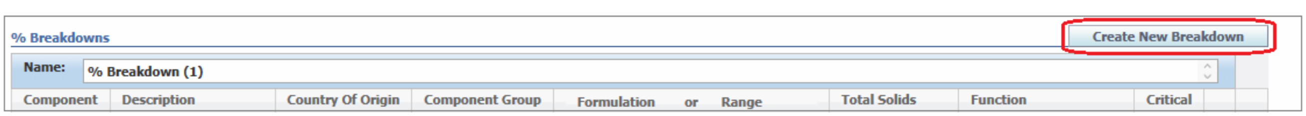
Create the eQ using the standard methods as described in "Creating a Questionnaire" on page 2-3. To allow the supplier to create breakdowns make sure the "Supplier Created Breakdown" option is checked, as shown in the figure below. This can be marked as required or optional. When marked as required the supplier is required to fill out at least one breakdown.

Figure 3–4 Supplier Created Breakdown option



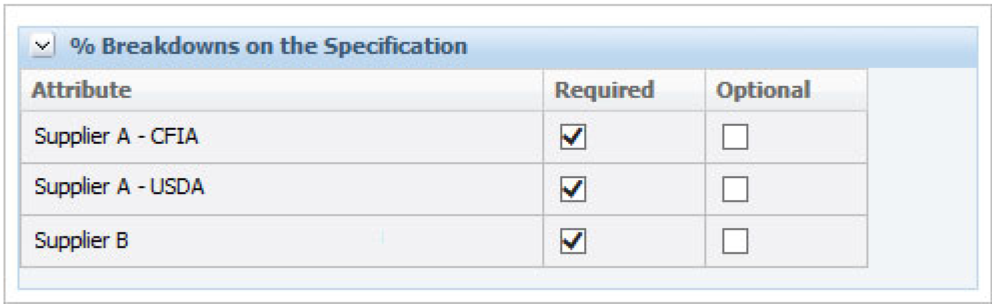
When this option is selected, a blank %Breakdown is presented to the supplier. The supplier is also able to create new %Breakdowns using the **Create New Breakdown** button, as shown inFigure 3–5 below.

Figure 3–5 Create New Breakdown button



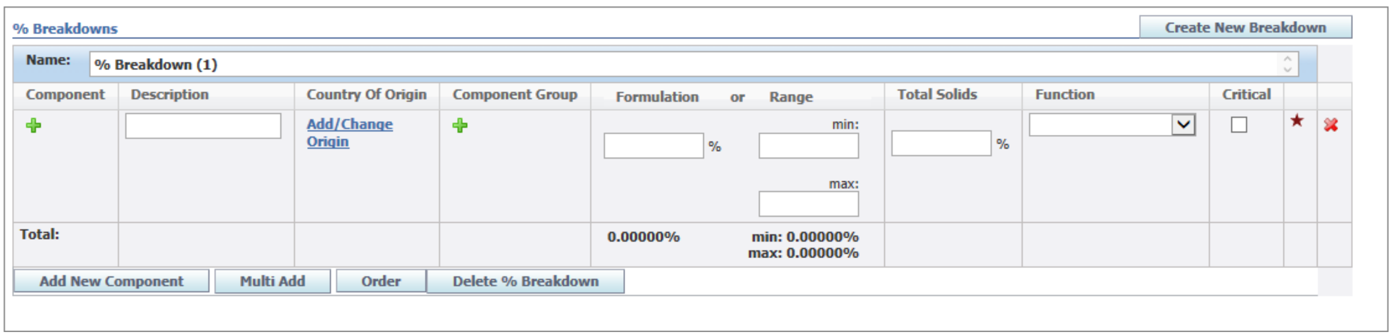
If you import a specification the %breakdowns on that specification are listed for selection in eQ, as shown in the figure below. Notice how the R&D breakdown is not included. Since they are pre-selected for your convenience, you would then select the breakdowns you don't want to include.

Figure 3–6 Imported % breakdowns



The % Breakdowns selected appear in the questionnaire as shown in Figure 3–7 below. Components from the example were removed to allow for screen space.

Figure 3–7 Selected breakdowns appear in the questionnaire



Fields in the supplier breakdown view include:

Component—Name of the component. Previously this was the Component Description field. This field is configurable to allow for free text or force the supplier to select a component catalog term.

Description—Description of the component.

Country of Origin—Country of origin for the breakdown.

Component Group—Component catalog group for the breakdown.

Formulation or Range—A component can be defined as a Formulation or Range. Formulation is the percentage of the material that is made up of this component. Range is a range defined for the component, as opposed to a specific value.

Total Solids—Percentage of the specification that is not water. Based on your configuration, this might display as Total Moisture.

Function—Defines the function of the particular component to the overall material. For example, acid, color, or preservative.

Critical—Indicates whether the component is considered critical.

Total—A total row has been added to help suppliers reach 100%.

The ability to delete components is now also available to suppliers.

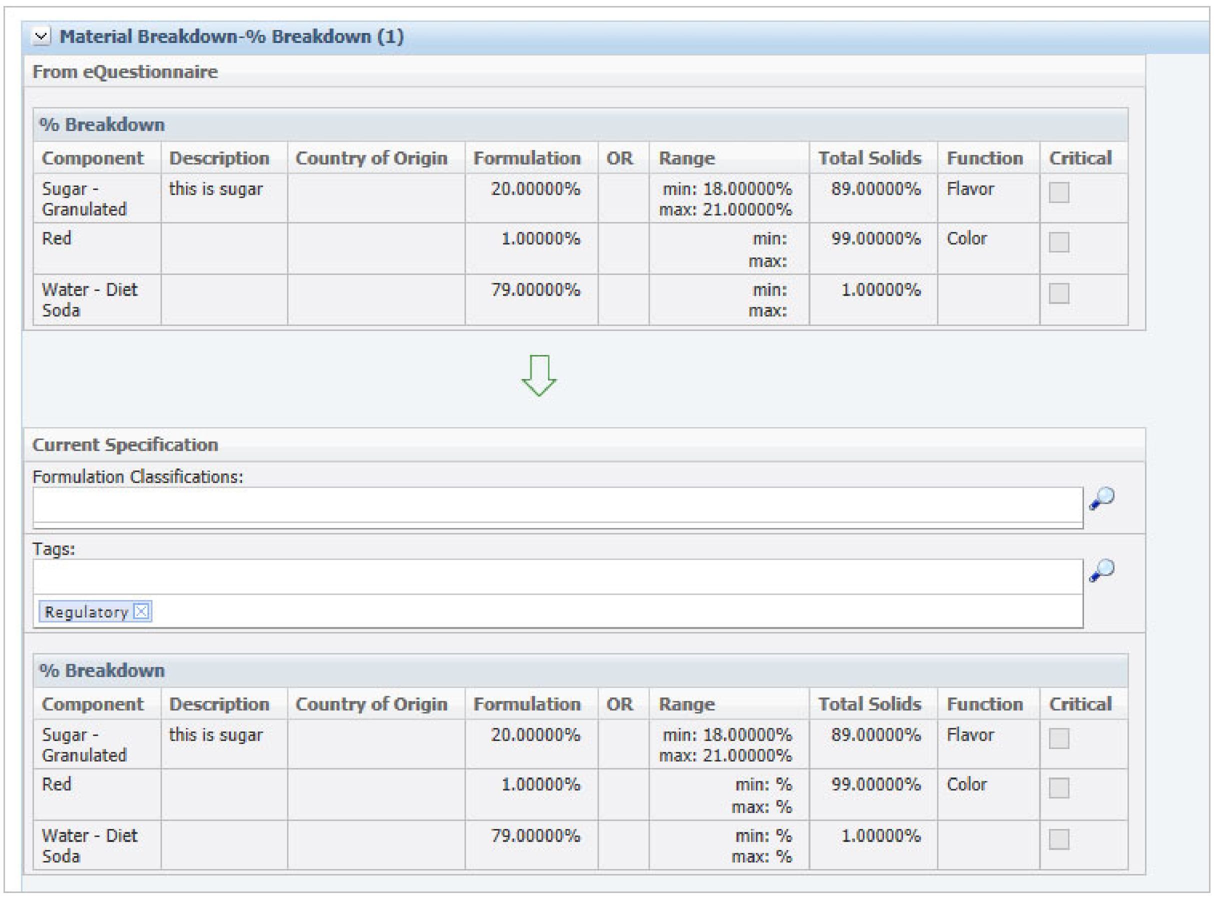
Supplier Initiated Questionnaires

When a supplier initiates a questionnaire, only the breakdowns available to them will be available in the questionnaire that is created. If your eQ template has Supplier Created Breakdown option checked, then the supplier is also able to create additional breakdowns. While suppliers can delete the breakdowns they create in the questionnaire process, they are not allowed to delete the specification created breakdowns. This feature is described in more detail in "Creating Supplier-Initiated Questionnaires" on page 2-14.

Pushing Breakdowns Back into GSM

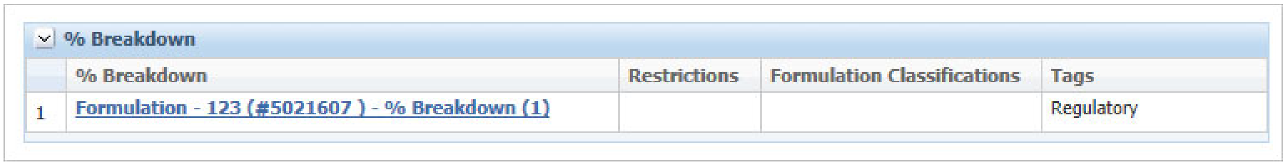
Once the supplier submits the questionnaire, you can push the breakdowns into GSM. Multiple breakdowns can be pushed into GSM. You are able to edit the formulation classification and tag fields before saving the specification, as shown in Figure 3–8 below.

Figure 3–8 Editing pushed breakdowns



The figure below shows what the breakdown listing would look like if you were to push both supplier edited breakdowns into GSM. Notice that both breakdowns pushed into GSM follow a specific naming convention: Formulation - (Questionnaire #) - Name of Breakdown submitted by the supplier. From here you can edit the supplier submitted breakdowns - renaming them, deleting the previous breakdowns, etc.

Figure 3–9 Supplier edited breakdowns pushed into GSM



% Breakdown

	% Breakdown	Restrictions	Formulation Classifications	Tags
1	Formulation - 123 (#5021607) - % Breakdown (1)			Regulatory