Quality Notes
POI Role Guide

March 2018

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Introduction

This role-based guide covers the primary actions that are performed specifically by users with the PO Issuer (POI) role. For a more comprehensive guide, please reference the Quality Notes User Guide.

About the PO Issuer (POI)/Manufacture Responsible Party (MRP)

In the disposition chain, suppliers QNs are routed to the POI. The PO Issuer issues the PO for the part documented in the QN. Engine Center QNs that do not have a POI are routed to the MRP. **Both POIs and MRPs can view the progress and status of QNs that have been created in Quality Notes. POIs can apply PMRPs when the QN state is missing PMRP in Quality Notes**. Additionally, users with the POI role can log into Quality Notes to access e2Open's E2open's Business Intelligence reporting tool. All other responsibilities will be completed by the POI/MRP in their local system and not directly in Quality Notes.

Responsibilities of users with the POI/MRP role include:

- View assigned QNs.
- Assign PMRP when PMRP is missing.
- Requests additional information (also known as RFI) from the originator who forwarded the QN (e.g. QNO).
- May provide preliminary review disposition to the QNO. Preliminary review is part of the disposition process and is completed on the business side. This may require input from higher authority.
- Approve or reject dispositions.
- Add or delete QN lines that have not been dispositioned.
- When both disposition and RCCA are complete, a QN will transition into a RCCA state. Users with the role of POI are responsible for transitioning QNs to RCCA.

Search

The Quality Notes solution has a variety of searches available. Purchase Order Search and Draft Search are types of searches specifically available to users with the POI role. Additional search types can be located in the Quality Notes User Guide.

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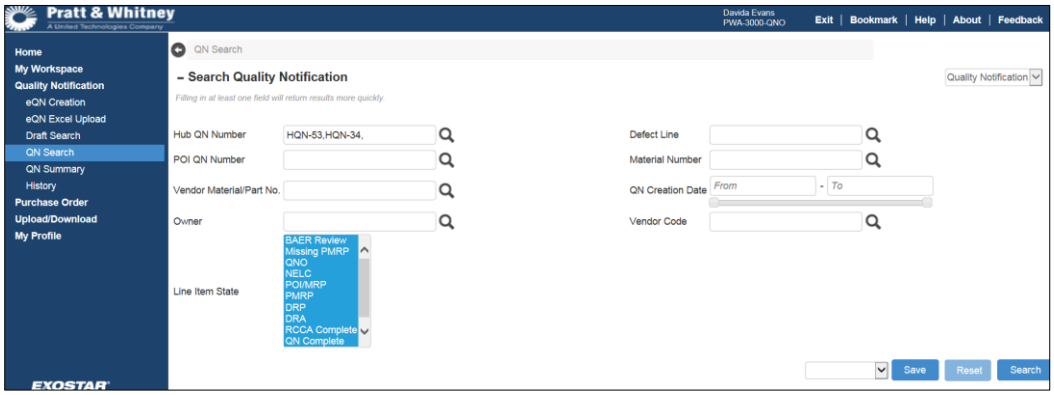
Using Search to Locate Quality Notifications

You can locate QNs using the search options available on the Navigation Tree. Search is best used when you are looking for a specific notification. The Search option allows you to search using QN Search and QN Summary. Depending on your role, Navigation Tree results may appear differently. If you have multiple user roles, you must be logged in with the correct role for the information you are searching for is associated with.

1. From the **Navigation Tree**, go to **Quality Notification** then click **QN Search** or **QN Summary**.
2. If selecting **QN Search,** enter or select search criteria. Click **Search**.



***Note**:*

- *Search fields without the **auto-complete** feature are case sensitive.*
- *Asterisks (*) can be used a wildcards for unknown characters.*
- *Use commas to separate multiple items.*
- *The magnifying glass can be used to perform advanced searches.*

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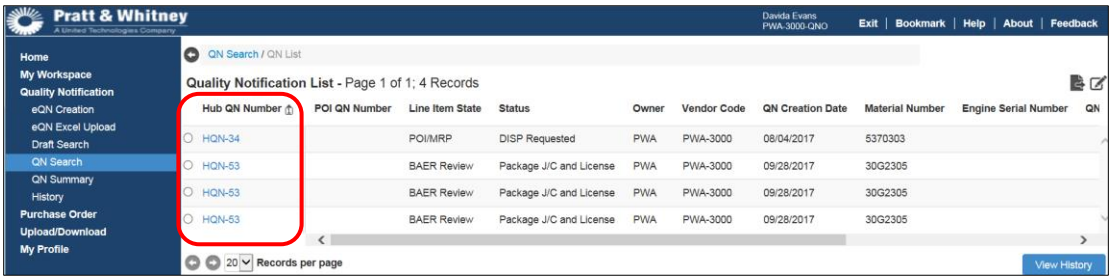
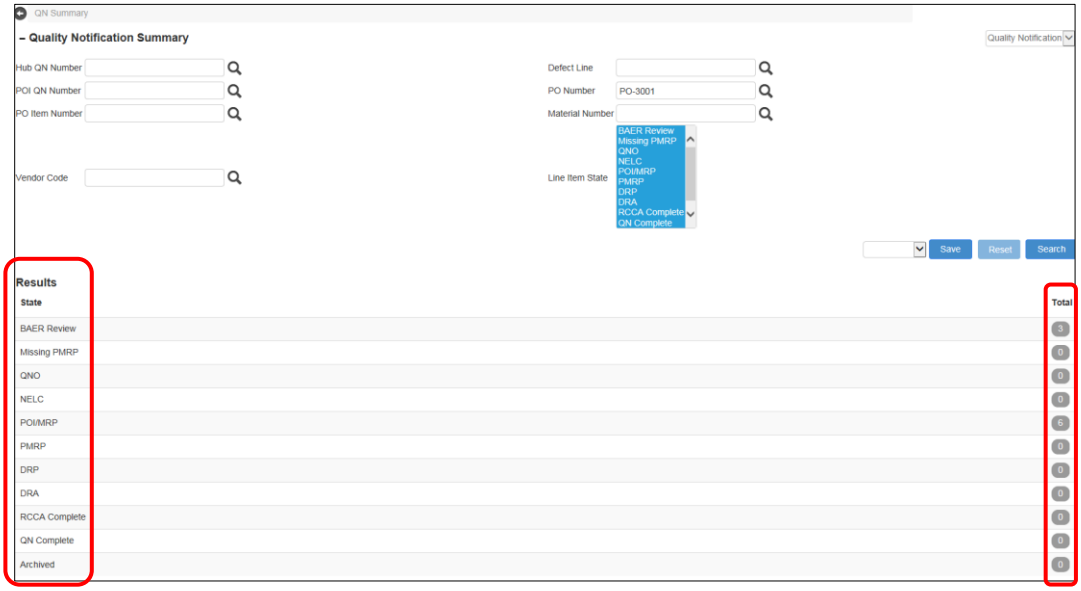
3. Search results display. Click the **QN** to view.



Note: **View History** allows you to view the audit history of a QN.

4. If selecting **QN Summary,** the QN Summary page provides access to all transactions within each notification workflow state. **Results may vary depending on what role you are using.**

5. Access the list of notifications in a specific state by clicking on the number in the **Total** column. To narrow results, enter or select search criteria and click **Search**. Results display by state. Information that displays varies by role.



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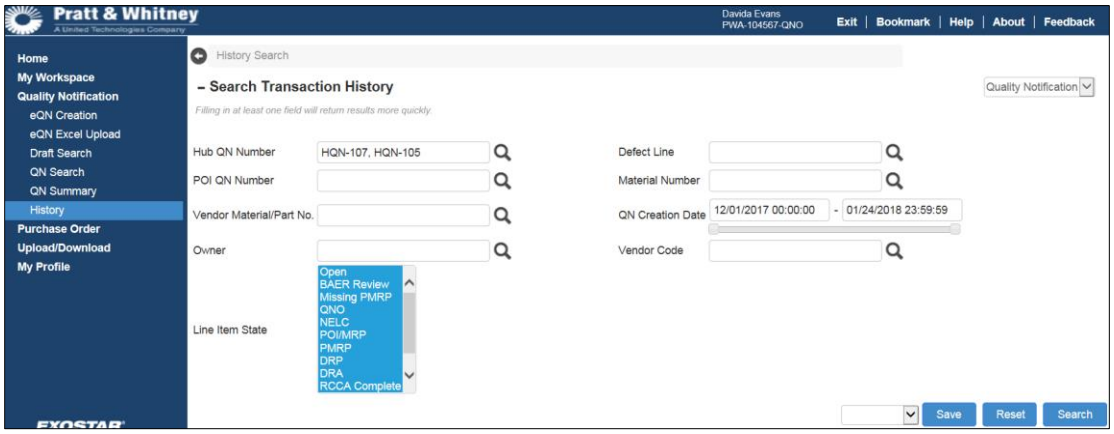
QN History Search

The QN History Search feature provides an audit trail of QNs.

To search:

1. From the **Navigation Tree**, go to **Quality Notification** then **History.**
2. Enter or select search criteria. Click **Search**.

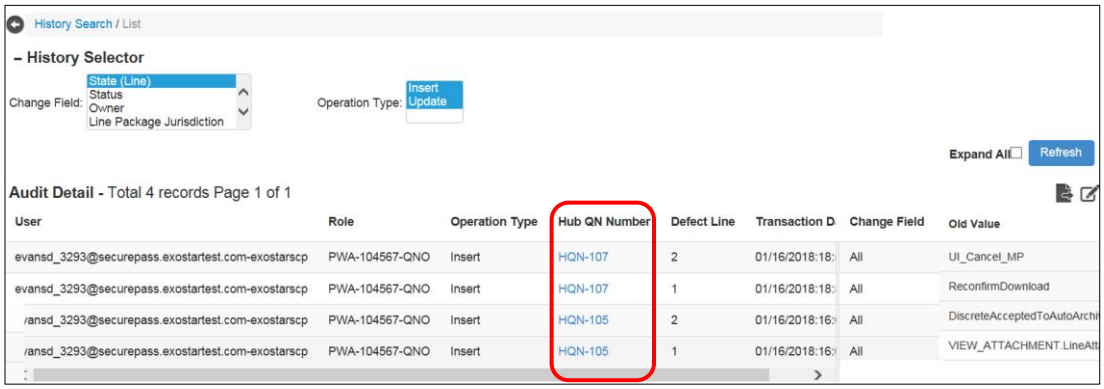


***Note**:*

- *Search fields without the **auto-complete** feature are case sensitive.*
- *Asterisks (*) can be used a wildcards for unknown characters.*
- *Use commas to separate multiple items. The system allows users to search for multiple QNs at one time.*

- *The magnifying glass can be used to perform advanced searches.*

3. Audit detail information displays. Click the **QN** to view audit history. If you have multiple QNs (as shown below), click the QN number to view audit history for that specific QN.



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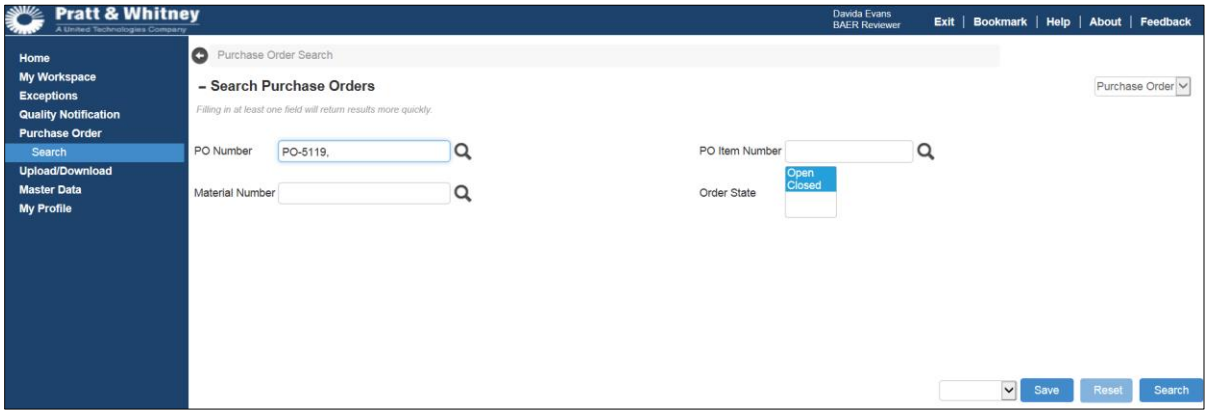
Purchase Order (PO) Search

PO Search allows users to locate POs.

To search:

1. From within the **Navigation Tree**, go to **Purchase Order** then **Search**.

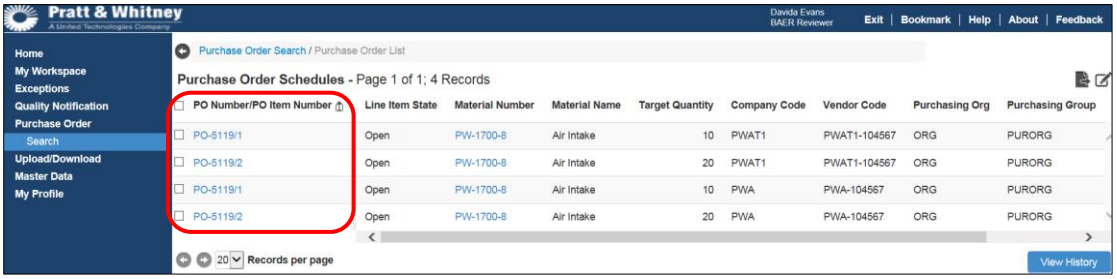
2. Enter or select search criteria. Click **Search**.



Note:

- Search fields without the 'auto-complete' feature are case sensitive.
- Asterisks (*) can be used a wildcards for unknown characters.
- Use commas to separate multiple items. The system allows users to search for multiple POs at one time.
- The magnifying glass can be used to perform advanced searches.

3. Search results display. The 1 and the 2 after the PO indicates the **PO Item Number**. QNs can be created against a specific PO Item number for a given PO. Click the **PO** to view.



Note: View History allows you to view the audit history of a PO.

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Search Field Definitions

PO Search Fields

PO Number	The number assigned to a Purchase Order
Material Number	Unique number that identifies the material
PO Item Number	Item number listed within a PO
Order State	State of the Purchase Order (Opened or Closed)

Engine Center QNs

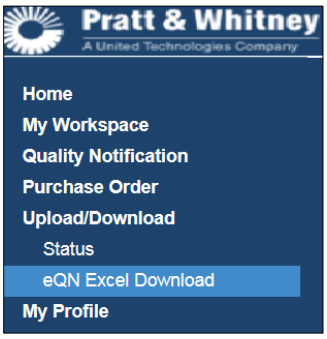
Engine Center QNs from PWA engine centers (internal engine center QN) or non-PWA engine centers (such as PWC and MTU) are created in the engine center's local system and can only be created in Quality Notes via B2B connection. **Engine Center QN responses and updates are submitted via a participants' local system and not Quality Notes directly**. **Participants will be able to view QN statuses in Quality Notes.**

Download QNs using Excel Download Option

Users with the POI role can download QN data in Excel format. The downloaded file contains non-technical data for all the QNs. Users who are granted access to view technical data have technical data fields populated in the file.

Ensure you are using the correct role the information you are downloading is associated with if you have multiple POI roles.

1. From the Navigation Tree, go to **Quality Notification.** Click **Upload/Download** then **eQN Excel Download.**



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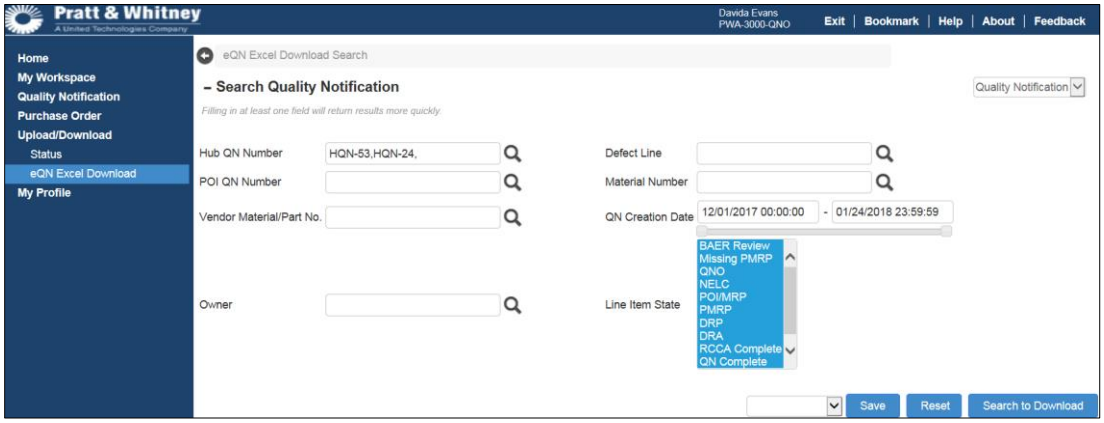
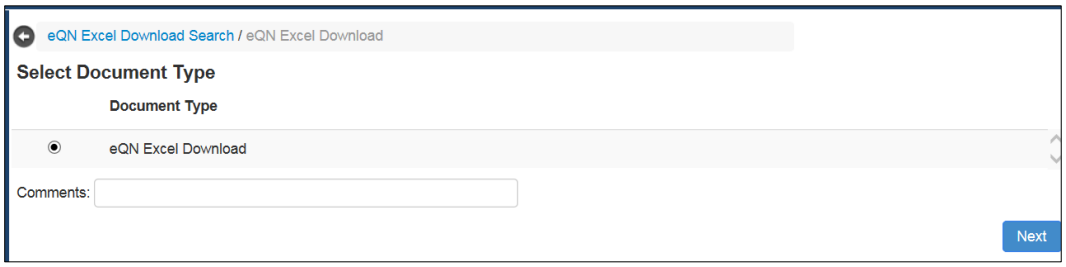
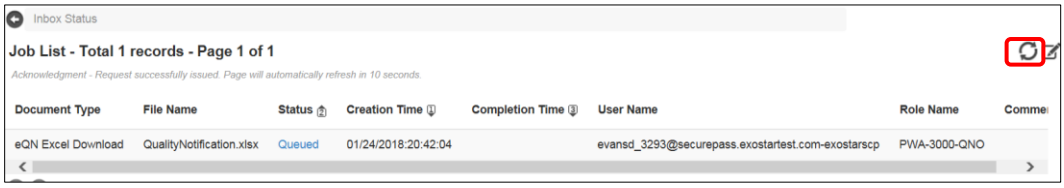
2. Enter or select search criteria. Click **Search to Download**.



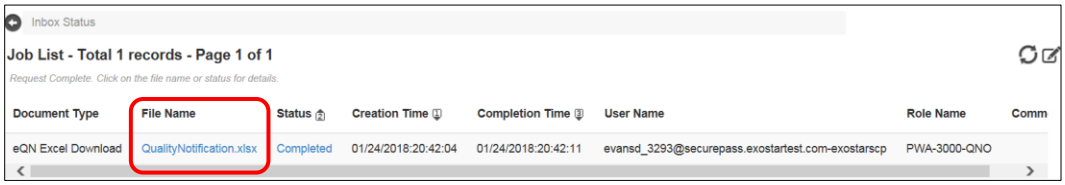
3. The document type screen displays. Click **Next**.



4. If the status remains Queued and does not display Completed, click the **Refresh** icon.



5. Once the download has successfully completed, the status displays **Completed**. Click on the file name to view.



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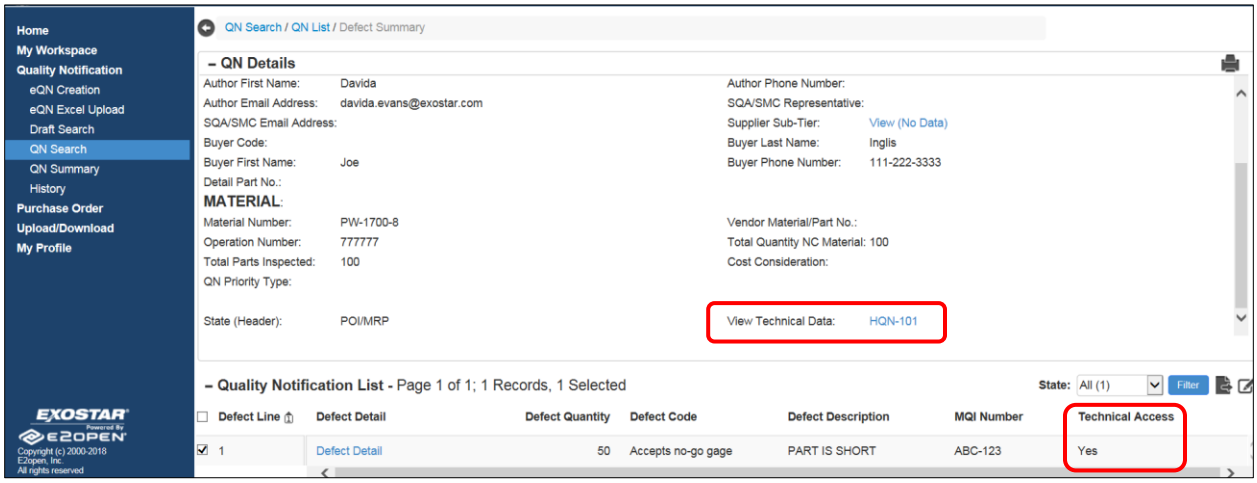
QN Excel Download Search Fields

Hub QN Number	QN Number (e.g. HQN-100)
POI QN Number	Internal number used for POI
Vendor Material/Part No.	Vendor's Material Number or Part Number
Owner	Owner of the QN (e.g. QNO, DRP, etc.)
Defect Line	QN Line Number that uniquely identifies each line in the QN
Material Number	Unique number that identifies the material/part
QN Creation Date	Date or date range of QN creation
Line Item State	State of the QN defect line

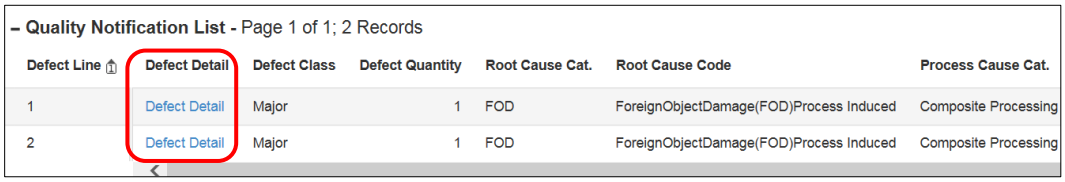
Viewing Technical Data

If you are authorized to view technical data, the **View Technical Data** field is available for you to view by clicking the **QN ID**. Additionally, notification of technical access displays **Yes.**



1. After clicking the **QN ID** in the **View Technical Data** field, technical data will be viewable. Technical Data displays in a new window.

2. To view technical defect details, click defect details. Technical data details displays in a new window.



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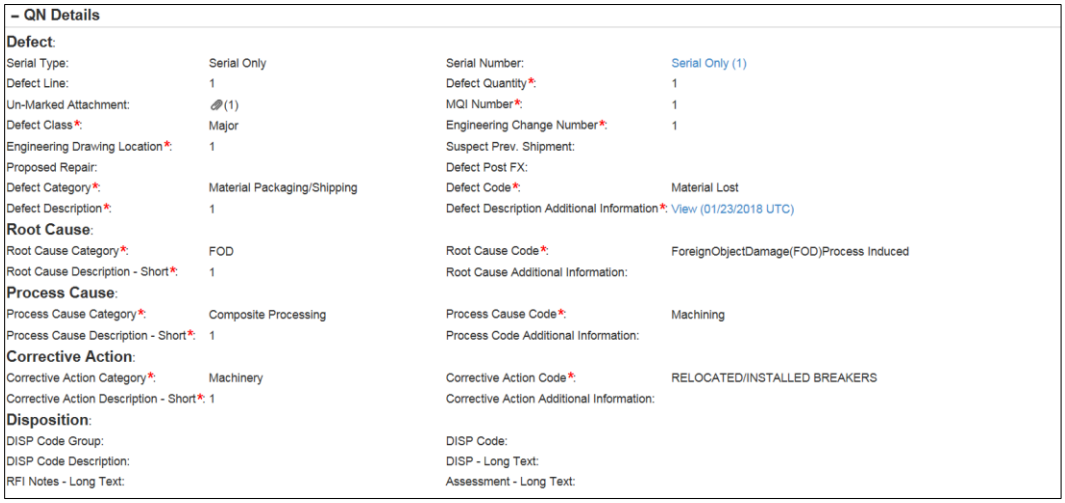
3. QN detail information will display for the defect line.



– QN Details

Defect:

Serial Type:	Serial Only	Serial Number:	Serial Only (1)
Defect Line:	1	Defect Quantity*:	1
Un-Marked Attachment:	(1)	MQI Number*:	1
Defect Class*:	Major	Engineering Change Number*:	1
Engineering Drawing Location*:	1	Suspect Prev. Shipment:	
Proposed Repair:		Defect Post FX:	
Defect Category*:	Material Packaging/Shipping	Defect Code*:	Material Lost
Defect Description*:	1	Defect Description Additional Information*:	View (01/23/2018 UTC)

Root Cause:

Root Cause Category*:	FOD	Root Cause Code*:	ForeignObjectDamage(FOD)Process Induced
Root Cause Description - Short*:	1	Root Cause Additional Information:	

Process Cause:

Process Cause Category*:	Composite Processing	Process Cause Code*:	Machining
Process Cause Description - Short*:	1	Process Code Additional Information:	

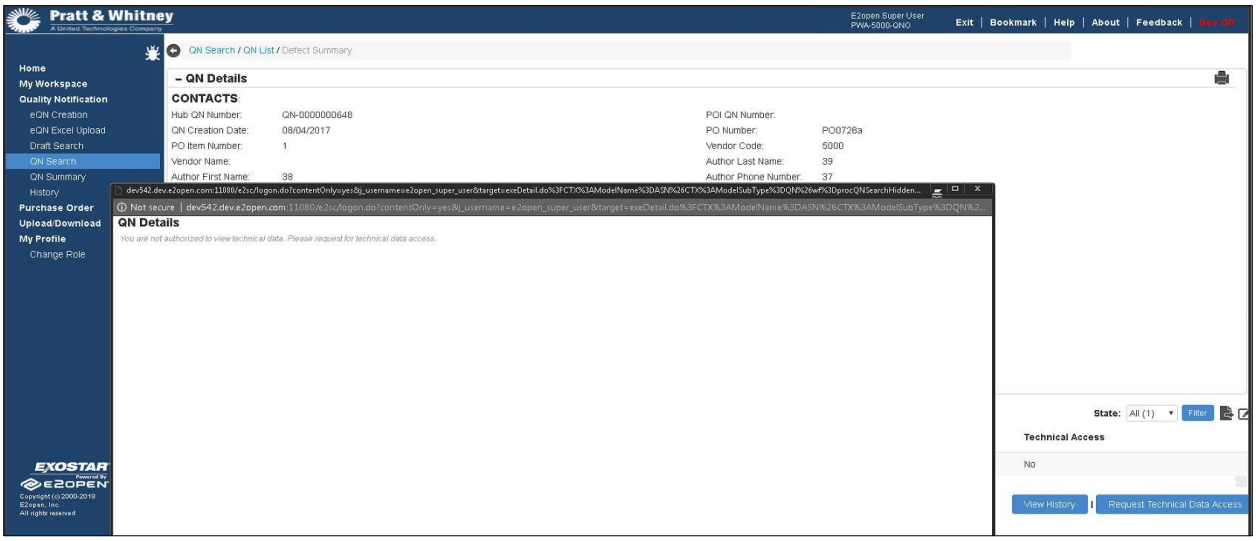
Corrective Action:

Corrective Action Category*:	Machinery	Corrective Action Code*:	RELOCATED/INSTALLED BREAKERS
Corrective Action Description - Short*:	1	Corrective Action Additional Information:	

Disposition:

DISP Code Group:		DISP Code:	
DISP Code Description:		DISP - Long Text:	
RFI Notes - Long Text:		Assessment - Long Text:	

If you are unauthorized to view technical data, you receive a notification when trying to view the information.



Requesting Technical Data Access

If you are unable to view technical data, click **Request Technical Data Access**. The request is routed for BAER Review.

Additional Problem Description and Long Text Information Fields

When data is updated in additional information fields such as Additional Problem Description-Long Text in the QN Header or fields such as Defect Description Additional Information and Root Cause Additional Information in the QN Defect Line, timestamp information (MM/DD/YY

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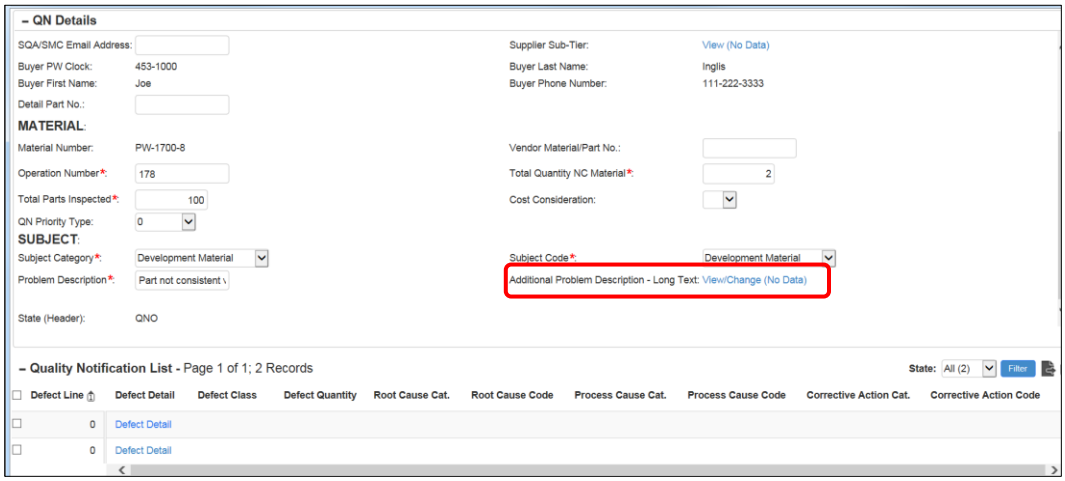
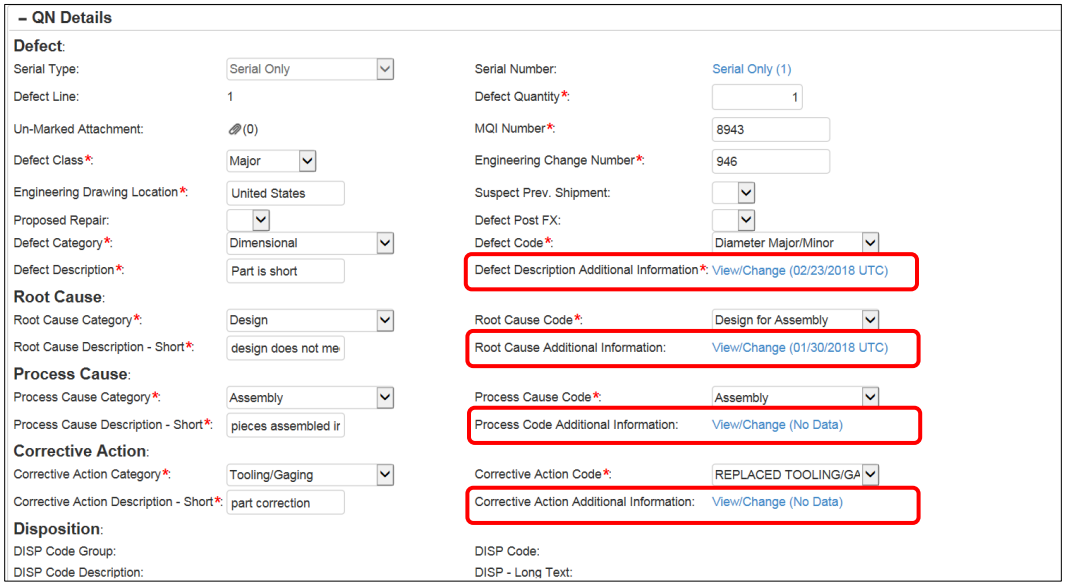
and UTC) displays. If **View/Change (No Data)** displays, no information was entered. When information is updated in these fields, the date reflects the date the update was completed. To view, click **View/Change**.

Additional information and long text fields contain participant responses. Once a QN has been submitted, additional and long text fields are considered technical data. All user roles require technical data access to view. QNO's will be able to provide responses in these fields as long as they have technical data access.

QN Header:



QN Line Details:



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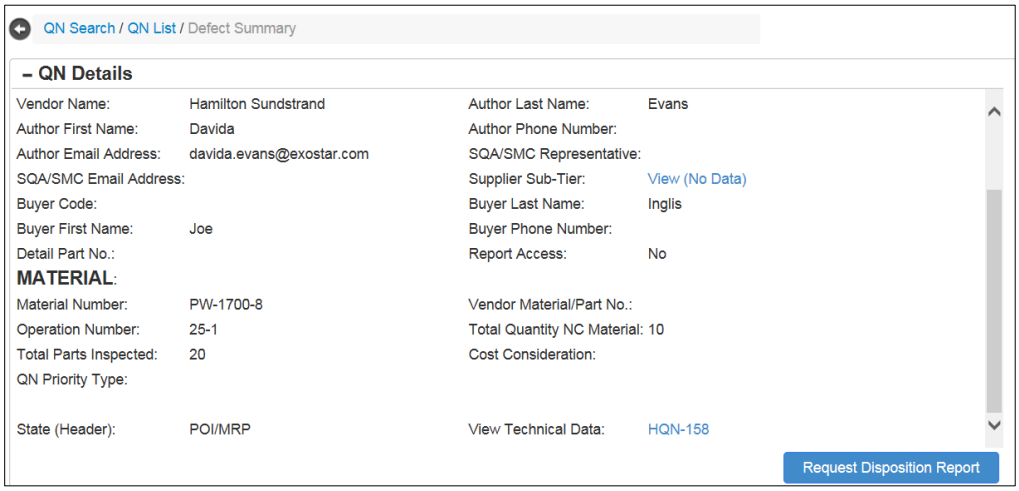
Print Disposition Report

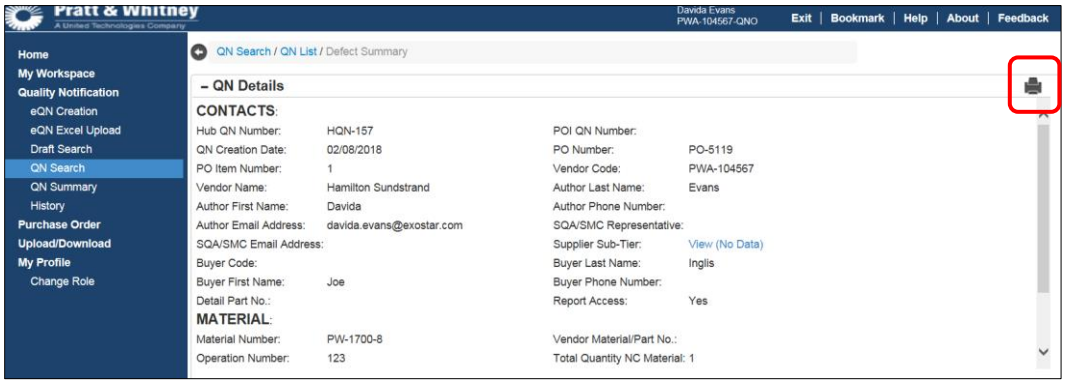
Requesting a disposition report allows a user to print all lines of the QN (including technical data but not attachments). When a request to print is made, a QN line state may not reflect BAER review. However, the request is sent for BAER review. The BAER Reviewer has the right to approve or reject the request.

1. Click **Request Disposition Report**.



2. The request is routed to BAER Review for a report license.

3. If approved, you will see a printer icon available. There is no indication alerting you that your request has been approved for printing. You will need to verify if you have been approved for printing by checking the QN that you requested to print. To print, click the print icon.



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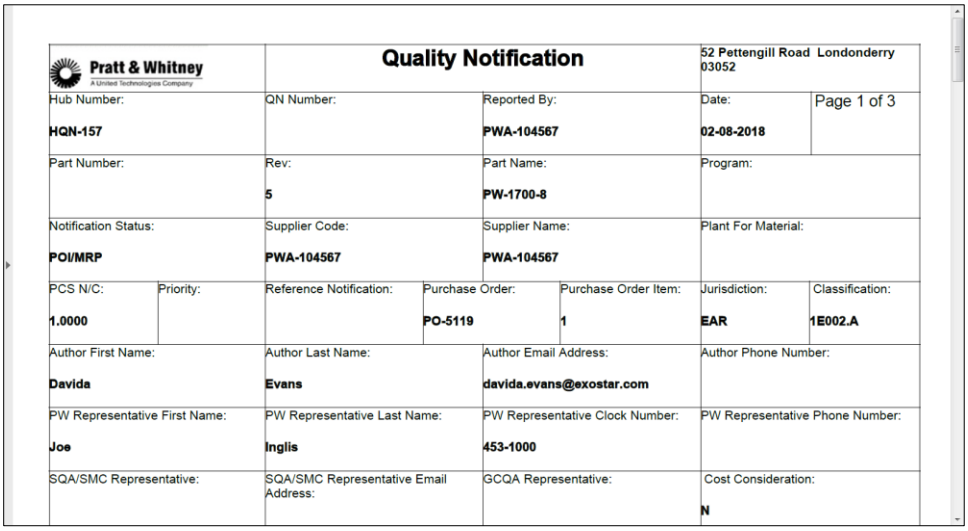
4. The disposition report displays for printing.



Pratt & Whitney
A United Technologies Company

Quality Notification

52 Pettengill Road Londonderry 03052

Hub Number:	QN Number:	Reported By:	Date:	Page 1 of 3
HQN-157		**PWA-104567**	**02-08-2018**	

Part Number:	Rev:	Part Name:	Program:
	5	**PW-1700-8**	

Notification Status:	Supplier Code:	Supplier Name:	Plant For Material:
POI/MRP	**PWA-104567**	**PWA-104567**	

PCS N/C:	Priority:	Reference Notification:	Purchase Order:	Purchase Order Item:	Jurisdiction:	Classification:
1.0000			**PO-5119**	**1**	**EAR**	**1E002.A**

Author First Name:	Author Last Name:	Author Email Address:	Author Phone Number:
Davida	**Evans**	**davida.evans@exostar.com**	

PW Representative First Name:	PW Representative Last Name:	PW Representative Clock Number:	PW Representative Phone Number:
Joe	**Inglis**	**453-1000**	

SQA/SMC Representative:	SQA/SMC Representative Email Address:	GCQA Representative:	Cost Consideration:
			N

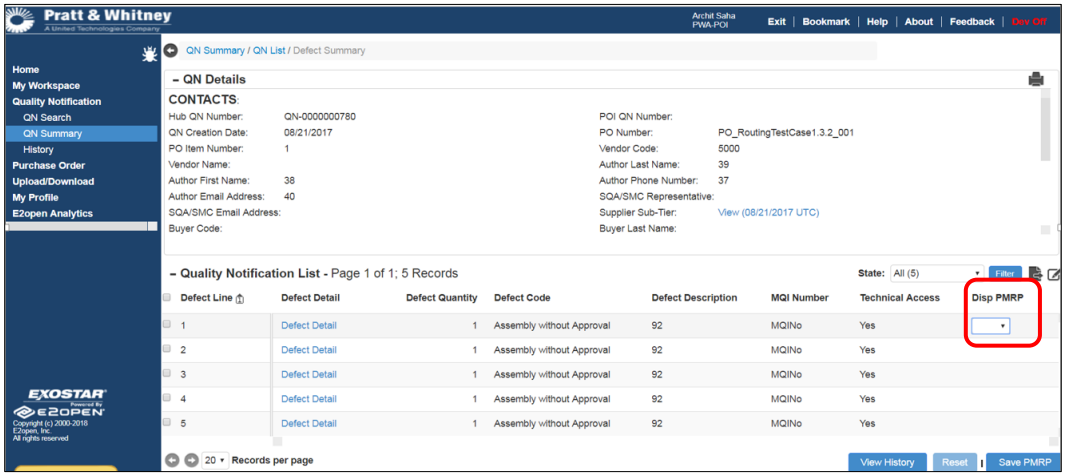
Assign Missing PMRP

When a QN is in a **Missing PRMP** state, the engine program was not identified or the engine program was provided (e.g. PW2020) but the PMRP for the part and engine program is unknown.

The POI is required to provide the engine program when forwarding a QN line to a higher participant (which is PMRP) in the chain. When QNs are in a Missing PMRP state, the POI must assign the PMRP.

To assign PMRP:

1. Select the company code for PMRP in the **Disp PMRP** field.
2. Click **Save PMRP** to update.



3. Once PMRP is assigned, the QN transitions to a PMRP state.

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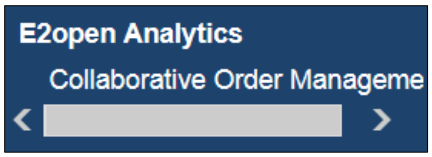
Reporting and Analytics

Users with the role of POI can log into Quality Notes to obtain analytics and create reports. Only users who are US persons can access the reporting tool.

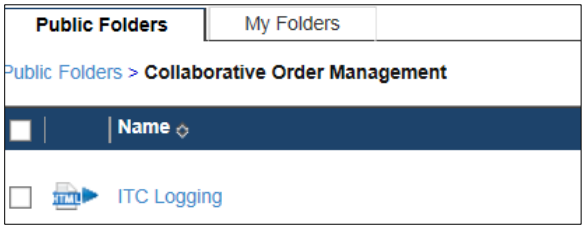
E2open's Business Intelligence reporting tool contains a pre-configured report, which includes information about users who have logged into Quality notes and accessed technical data. Additional information about the E2open IM Reporting Tool (including building custom reports) can be located in the e2Open IM Guide.

You can access the e2Open IM reporting application from Quality Notes.

1. From the Navigation Tree, click **E2open Analytics**. Click **Collaborative Order Management**.



2. Click **ITC Logging**.



Additional information for reporting can be found in the Reporting Help Files within the Quality Notes application.

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