PeopleSoft®

EnterpriseOne B73.3.1 Quality Management PeopleBook

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Table of Contents

Overview

System Setup

Test Results Processing

Reports

Glossary

Index

Overview

Quality Management Overview

The J.D. Edwards Quality Management system helps you record and manage data that relates to the material quality of your products. You can record quality test results in a consistent, controlled manner and monitor production processes to ensure product quality.

You can customize the system to meet the specific testing needs of your business by doing the following:

- Setting up quality tests
- Grouping tests into specifications
- Defining which tests to perform on items for a customer
- Defining which customers require a Certificate of Analysis

At defined points in your business cycle, you collect samples and perform quality tests. Then you can use the Quality Management system to enter and review the test results for an item. An example of a test result is a 0.20 percent syrup result for a sample of a soft drink being tested for syrup concentration.

Using this system, you can verify whether the material that you produce meets your specifications at different points in your business flow, such as the purchasing, sales order entry, and work order cycles. You can print test results and reports to help you make decisions and take corrective action if necessary.

By implementing a quality management system that helps you closely monitor product quality, you can accomplish the following:

- Reduce the costs of rework and scrap by making timely decisions about product quality
- Reduce labor costs by minimizing the time spent inspecting material, collecting data, and reworking or repairing defective material
- Reduce service trips by identifying suspect components before shipment
- Reduce material scrap costs by identifying inferior components
- Increase customer satisfaction by improving overall product quality

Features

The Quality Management system includes the following features:

Tests

You can set up an unlimited number of tests to perform within your business cycle. For each test, you define the minimum, maximum, and target values and whether the expected test result should be in numeric or alphanumeric format. You can also define the number of samples to take for each test and the sample size.

Examples of tests include dimensional tolerances, color, potency, purity, visual inspection, hardness, and resistance.

Specifications

Specifications enable you to group tests that belong together or should be performed together.

Examples include mechanical, visual, and electronic specifications.

Preference Profiles

After you define tests and specifications, you can create a preference profile. A preference profile (also referred to as a preference) determines which tests to perform, and when to perform them, for an item, item group, customer, or customer group. This enables you to customize your product tests both for your customers and the items that they order.

For example, use a preference when one customer requires higher tolerances of a test than another customer. You can use preferences to group the appropriate tests and customize them by customer.

Test Results Entry

You can work with tests directly from the Quality Management system as well as from programs in other systems. After you enter test results, the system evaluates the results against minimum and maximum values and sets each lot status to pass or fail.

You can enter test results during the following points of the manufacturing and distribution process:

- When entering receipts for items on purchase orders
- When routing receipts for purchase orders and work orders
- When moving items to stock after completed production
- When entering hours and quantities

- When confirming shipments or packages
- When confirming ECS bulk or package loads
- When entering sales orders
- When reviewing lots

Information Review

As you work with the Quality Management system, you can print tests and specifications by item and branch/plant. You can print test results by lot number and sales order number.

You can use the test result information to print a Certificate of Analysis (COA) for your customers. The COA includes all the tests that were performed and the resulting test data for lots sold to a customer.

For items that require testing, and when item names have changed during re-classification, you can review and trace lots through product records. You can also review non-conforming lots, which have failed quality tests.

Generic Text Entry

As you work with tests, you can enter additional information with generic text. Use generic text to indicate tools, testing equipment, and sampling methods for the following test-related information:

- Item
- Work order routing instruction
- Work order parts list
- Test entry
- Preference profile
- Specification entry
- Test result

System Integration

Quality Management works closely with features in the following systems:

- Inventory Management
- Procurement
- Product Data Management
- Shop Floor Management
- Sales Order Management

Tables

The Quality Management system uses the following tables:

F3701 – Test Definition	Contains test definitions, which consist of the Test ID, description, type of test, minimum and maximum values, target values, and effectivity dates. This table also contains information that indicates whether to print the test on the Certificate of Analysis and whether to print generic text.
F3702 – Specification Master	Contains the description of the specification and effectivity dates.
F37021 – Specification Detail	Contains information about the different tests that are grouped within the specification.
F3703 – Non- Conforming Material	Contains records of failed tests.
F3711 – Test Results	Contains the test results for an item and lot number in inventory or on a work order, purchase order, or sales order.
F3711Z1 – Test Results Work File	Contains test results uploaded from a LIM (Laboratory Information Management) system.
F37900 – Certificate of Analysis Extract	Contains test results that print on the Certificate of Analysis or Product Test Report.
F40318 – Preference Profiles for Quality Management	Identifies which tests or specifications are required for an item, item group, customer, or customer group.
F40318R – Preference Profiles Resolution History	Contains historical information on the number of times a preference has been used on sales orders.

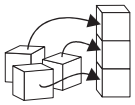
Menu Overview

The Quality Management system uses the following menus:

Quality Management (G370)

Daily Processing

- Quality Management Daily Operations (G37)



System Setup

- Quality Management Setup (G3741)

System Setup

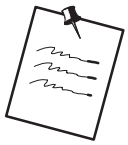
System Setup

You can customize the Quality Management system to meet the specific testing needs of your business. After you set up quality tests, you can group the tests into specifications. You can also define which tests to perform on items for a customer and which customers require a Certificate of Analysis.

Before you can use Quality Management, you must set up the following information:

- Branch/Plant Constants
- Tests
- Specifications (optional)
- Preference Profiles

With the exception of setting up Branch/Plant Constants in Inventory Management, these setup activities are performed in the Quality Management system.



To use the Quality Management system, you need to activate it at two levels:

- At the system level, see *Activating Quality Management*.
- At the branch/plant level, see *Setting Up Branch/Plant Constants*.

Setting up the Quality Management system consists of the following tasks:

- ❑ Activating Quality Management
- ❑ Setting up branch/plant constants
- ❑ Setting up tests
- ❑ Setting up specifications (optional)
- ❑ Setting up preferences
- ❑ Working with approval processing
- ❑ Reviewing tests and specifications
- ❑ Setting up inclusion rules for test results tracing (optional)
- ❑ Setting up customer billing instructions (optional)

Before You Begin

- ❑ To measure item quality by lot, activate lot control for the items that you want to measure. See *Entering Information for Lots* in the *Inventory Management Guide*.

- ❑ To measure item quality, determine which characteristics to include in the test for each item that you are measuring.

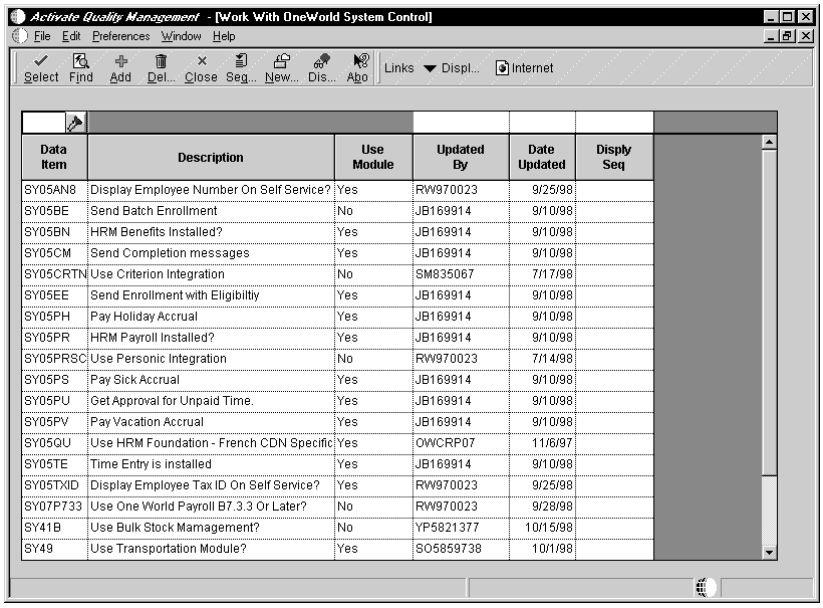
Activating Quality Management

To use Quality Management, you must activate it at the system level.

▶ To activate Quality Management

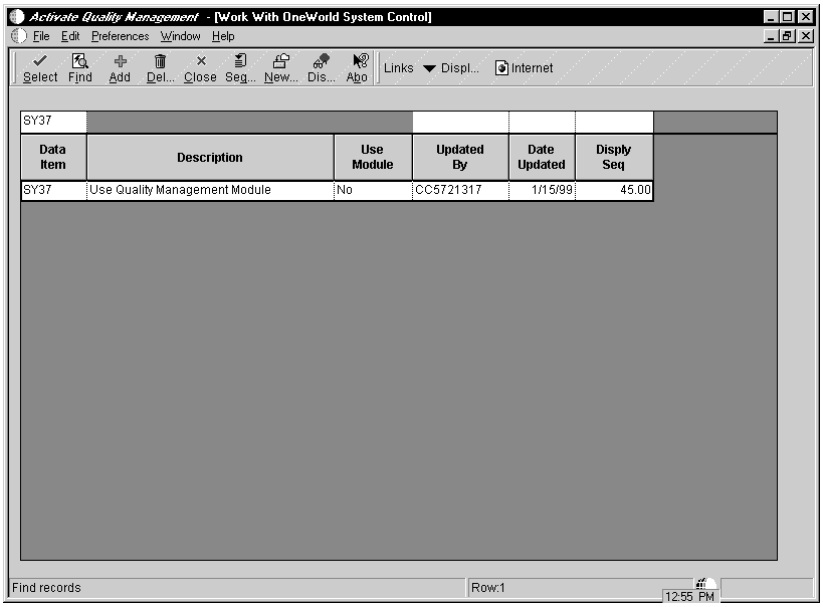
From the Quality Management Setup menu (G3741), choose Activate Quality Management.

On Work With OneWorld System Control

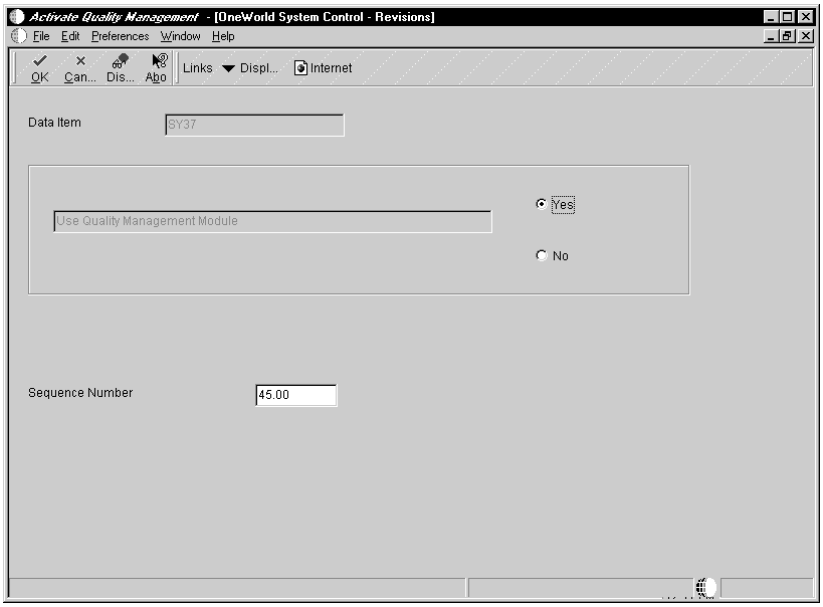


Data Item	Description	Use Module	Updated By	Date Updated	Disply Seq
SY05AN8	Display Employee Number On Self Service?	Yes	RW970023	9/25/98	
SY05BE	Send Batch Enrollment	No	JB169914	9/10/98	
SY05BN	HRM Benefits Installed?	Yes	JB169914	9/10/98	
SY05CM	Send Completion messages	Yes	JB169914	9/10/98	
SY05CRTN	Use Criterion Integration	No	SM835067	7/17/98	
SY05EE	Send Enrollment with Eligibiltiy	Yes	JB169914	9/10/98	
SY05PH	Pay Holiday Accrual	Yes	JB169914	9/10/98	
SY05PR	HRM Payroll Installed?	Yes	JB169914	9/10/98	
SY05PRSC	Use Personic Integration	No	RW970023	7/14/98	
SY05PS	Pay Sick Accrual	Yes	JB169914	9/10/98	
SY05PU	Get Approval for Unpaid Time.	Yes	JB169914	9/10/98	
SY05PV	Pay Vacation Accrual	Yes	JB169914	9/10/98	
SY05QU	Use HRM Foundation - French CDN Specific	Yes	OWCRP07	11/6/97	
SY05TE	Time Entry is installed	Yes	JB169914	9/10/98	
SY05TXID	Display Employee Tax ID On Self Service?	Yes	RW970023	9/25/98	
SY07P733	Use One World Payroll B7.3.3 Or Later?	No	RW970023	9/28/98	
SY41B	Use Bulk Stock Mamagement?	No	YP5821377	10/15/98	
SY49	Use Transportation Module?	Yes	SO5859738	10/1/98	

1. Type SY37 in the following field and click Find:
   - Data Item



2. Choose the SY37 row and click Select.



3. On OneWorld System Control – Revisions, click the Yes option for the following field (Use Quality Management Module) and click OK:
   - Module Existence
4. On Work With OneWorld System Control, click Find.
5. Verify that the Use Module field is set to Yes, and click Close.

Field	Explanation
Module Existence	A code that indicates that a particular module has been installed in your system.

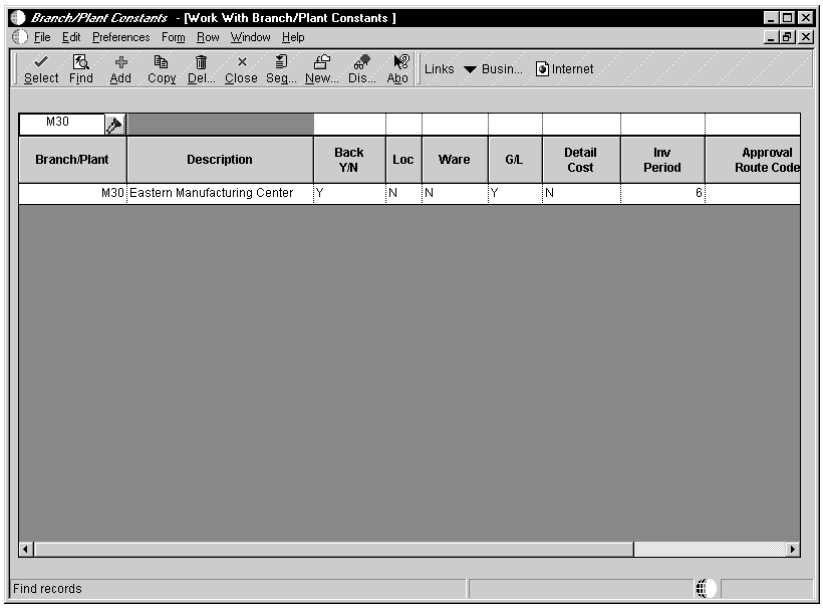
Setting Up Branch/Plant Constants

You must activate the Quality Management system for each branch/plant that you want to include in a quality test.

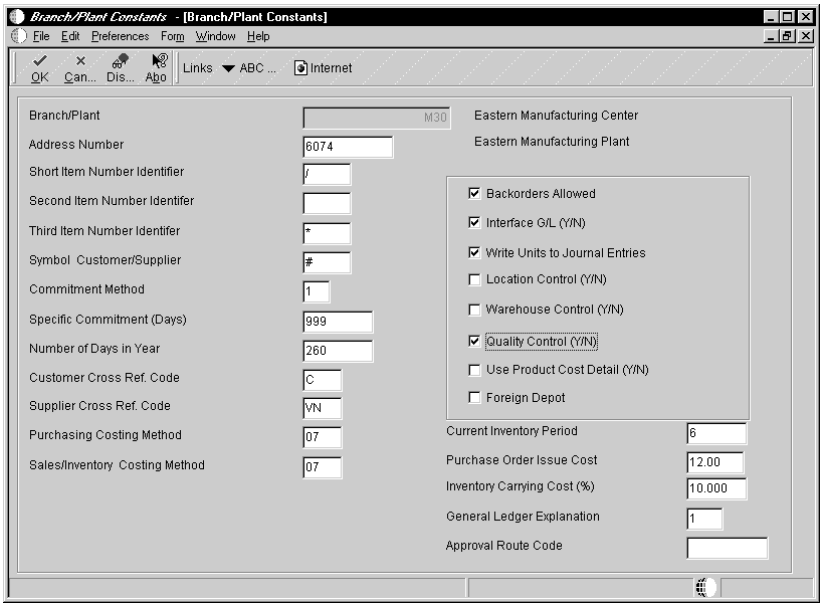
▶ To set up branch/plant constants

From the Inventory Setup menu (G4141), choose Branch/Plant Constants.

On Work With Branch/Plant Constants



1. To locate a specific branch plant, complete the following field and click Find:
   - Branch/Plant
2. Choose the Branch/Plant and click Select.



3. On Branch/Plant Constants, complete the following field:

   - Quality Control (Y/N)

Field	Explanation
Branch/Plant	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. NOTE: The system uses the job number for journal entries if you do not enter a value in the AAI table. . . . . . *Form-specific information* . . . . . . Use the Branch/Plant field at the top of the form to begin the form display with the branch/plant code you enter.

Field	Explanation
Quality Control (Y/N)	This field indicates whether to turn on the Quality Management system (system 37) for the branch/plant. For WorldSoftware, valid values are: Y Yes, turn on Quality Management for this branch/plant. N No, do not turn on Quality Management for this branch/plant. For OneWorld, a checkmark indicates that Quality Management is turned on for the branch/plant.

Setting Up Tests

After you activate the Quality Management system, you can define the tests to perform at a specific branch/plant or across all branch/plants. For example, you can define a test for syrup concentration levels for a soft drink.

For each test, you can define the following:

- The test description
- How to record results
- The number of test samples
- How to evaluate results
- The information to print on the Certificate of Analysis
- Test methods and reference numbers of the American Society of Testing Material (ASTM)

You can use generic text to add information or instructions related to a specific test, such as sampling methods to be used. The system automatically copies generic text from tests to preferences. Preferences enable you to customize tests and specifications for any combination of the following:

- Customer
- Customer group
- Item (product)
- Item group

If you set up alphanumeric test result values, you can set up a user defined code (UDC) table that contains the alphanumeric results and their corresponding numeric values. The system uses this table to determine if an alphanumeric test result is within the range of minimum and maximum values.

You can also set up alphanumeric test result values without UDCs, which allows you to enter free-form test results. For example, you might set up a test to calibrate equipment and then record when the test is performed. In this case, you are not concerned with a test result value.

After you set up tests, you can review and revise them. You can also print a test definition report.

Setting up tests consists of the following tasks:

- ❑ Defining tests
- ❑ Entering user defined codes
- ❑ Entering text for tests
- ❑ Reviewing tests

See Also

- *Setting Up Preferences* for information on customizing tests and specifications.
- *Printing Setup Reports* for a description of the Test Definitions Report.

Defining Tests

When you define a test, you specify which characteristics to measure for an item. For example, for a bottled soft drink, you might define one test for syrup concentration levels and another test for color.

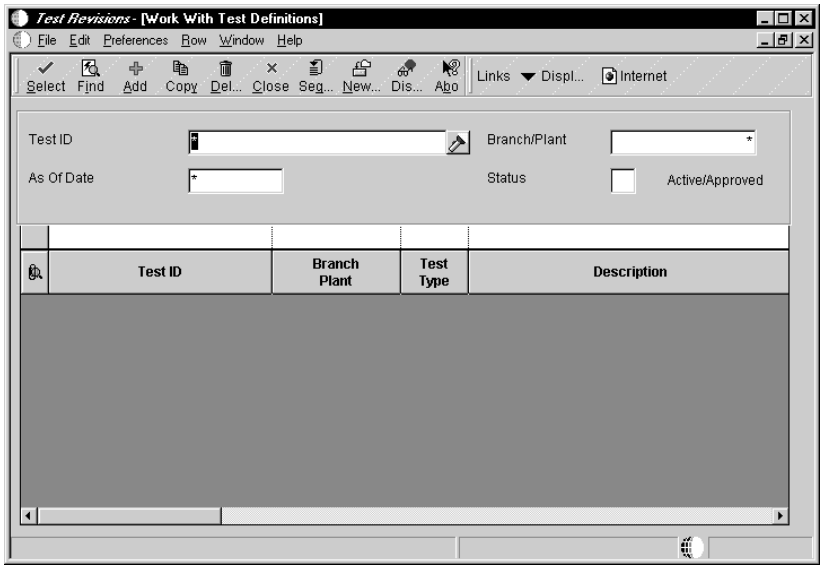
Before You Begin

- ❑ To use the approval process, set the processing option for Test Revisions to activate workflow.
- ❑ To create historical information, set the processing option for Test Revisions to log changes to test definitions.

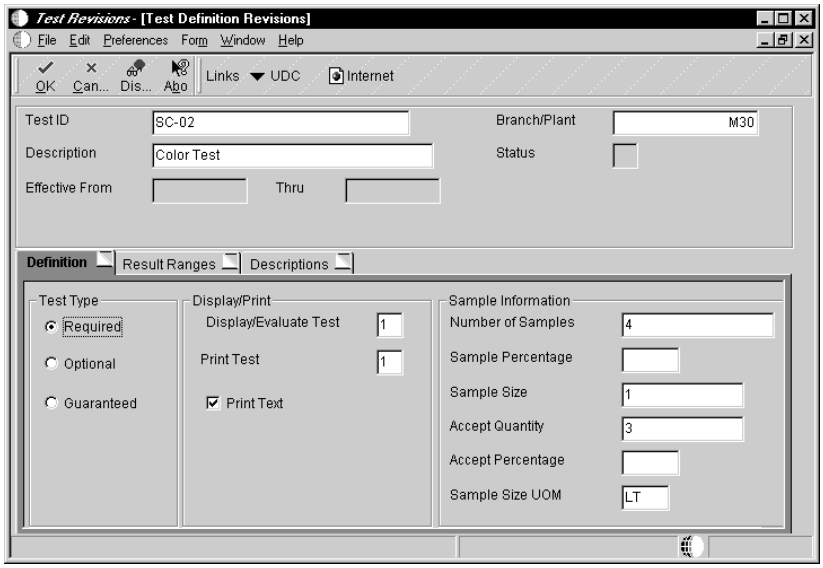
▶ To define tests

From the Quality Management Setup menu (G3741), choose Test Revisions.

On Work With Test Definitions



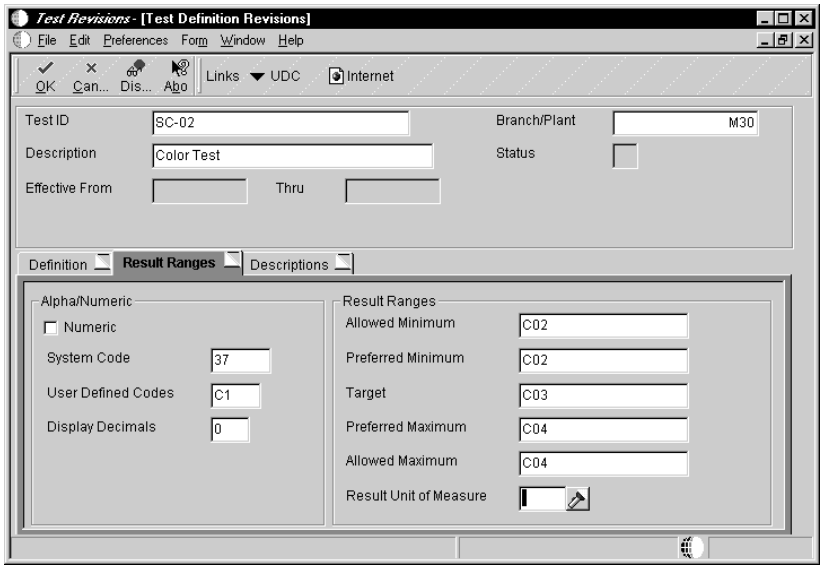
1. Click Add.



2. On Test Definition Revisions, complete the following fields:
   - Test ID
   - Description
3. Complete the following optional field:
   - Branch/Plant

   If you leave the Branch/Plant field blank, the test is valid for all branches.

4. On the Definition tab, complete the following fields to define how to record test results:
    - Test Type
    - Display/Evaluate Test
5. To determine which information to print on the Certificate of Analysis, complete the following fields:
    - Print Test
    - Print Text
6. To define information about the sample, complete the following fields:
    - Number of Samples
    - Sample Percentage
    - Sample Size
    - Accept Quantity
    - Accept Percentage
    - Sample Size UOM
7. Click the Result Ranges tab.



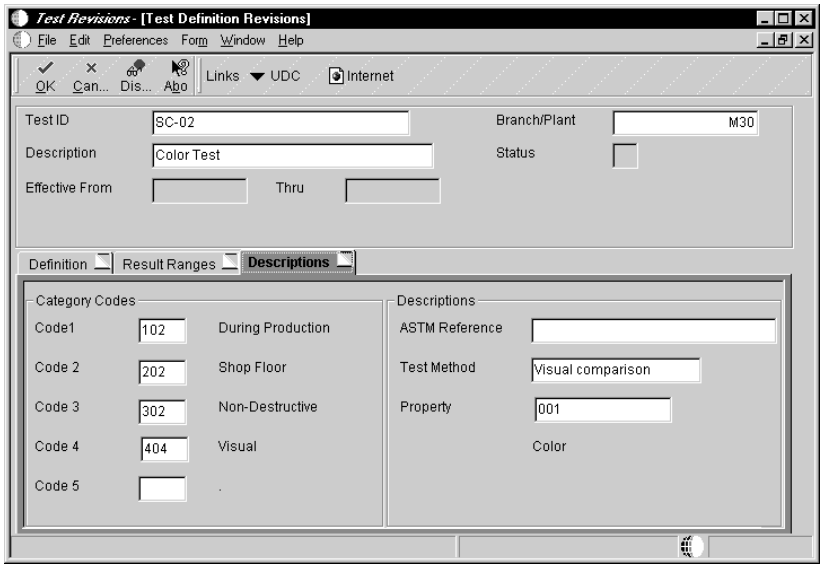
8. Complete the following fields:
    - Numeric
    - Display Decimals

9. Complete the following optional fields:
   - System Code
   - User Defined Codes

   For tests that are alphanumeric (Numeric option is blank), you do not need to define a user defined code table. By leaving the Numeric option blank, you can enter free-form test results. Any non-blank value in the test result passes.

   For example, you can create a test for machine calibration. You might enter the machine serial number or Yes for checked calibration. This does not keep the lot from passing the quality test.

10. To define information about the sample and how to evaluate it, complete the following fields:
    - Allowed Minimum
    - Target
    - Allowed Maximum
    - Result Unit of Measure
11. Complete the following optional fields:
    - Preferred Minimum
    - Preferred Maximum
12. Click the Descriptions tab.



13. Complete the following fields to categorize tests into groups for reporting purposes:
    - Test Method
    - Property
14. To further categorize tests, complete any of the category code fields.
15. To identify a recommended testing procedure of the American Society of Testing Material, complete the following optional field, which is for information only:
    - ASTM Reference

Field	Explanation
Branch/Plant	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. NOTE: The system uses the job number for journal entries if you do not enter a value in the AAI table.
Test ID	The unique identification for a test to be performed on an item. For example: COL Color test DENS Density Test CL–2 Clarity Test
Description	A brief description of an item, a remark, or an explanation.

Field	Explanation
Test Type	Controls how the system processes tests as you enter test results. For example: R Required – Result values are required during Results Entry. The system does not allow an item to pass quality inspection until you enter results for each required test. O Optional – Result values are optional during Results Entry. The system does not require the entry of a result for each optional test. However, if you input failing results, the item fails quality inspection. G Guaranteed – Result values are optional during Results Entry. You can control whether Guaranteed tests appear as you enter test results with the 'Display Test' field on Test Revisions. In addition, guaranteed tests print on the Certificate of Analysis.
Display/Evaluate Test	A code that determines how test results appear in Test Results Inquiry when accessed from sales orders. This code also determines how a test is to be evaluated. Valid values are: 0 Do not display tests when using Test Results Revisions or result inquiry programs. This value is only allowed for tests of type G, Guaranteed. 1 Display all occurrences of a test when using result inquiry programs. To provide for the entry of result values, all occurrences of a test appear in Test Results Revisions. The system uses all result values to determine if a lot passes or fails. 2 Display only the average result record when using result inquiry programs. All occurrences of a test appear in Test Results Revisions. The system uses only the average test result to determine if a lot passes or fails. 3 Display the last occurrence of a test when using result inquiry programs. The last occurrence is the test result last entered in Test Results Revisions. The system uses only the last test result to determine if a lot passes or fails.
Print Test	A code used to determine whether or not a test will print on the Certificate of Analysis. The valid values are: 0 The test will not print on the Certificate of Analysis. 1 Print all occurrences of a test on the Certificate of Analysis. 2 Print just the average test result record when printing the Certificate of Analysis. 3 Print the last occurrence of a test when printing the Certificate of Analysis. The last occurrence will be the test results record that was entered last using Test Results Revisions.

Field	Explanation
Print Text	Determines whether the generic text for an item that is input through Test Result Revisions (P37111) will print on the Certificate of Analysis. Valid values are: 1 Print the generic text associated with this test in Test Results Revisions on the Certificate of Analysis. 0 Do not print any generic text associated with this test in Test Results Revisions on the Certificate of Analysis.
Number of Samples	The number of samples to be taken for the test.
Sample Percentage	The percentage of an order quantity that determines the number of samples to create in Test Results Revisions. For example, if the sample percentage is 50 percent and the order quantity is 10, then 5 samples will be created in Test Results Revisions. Use either this field or Number of Samples to control how many samples to create. You can use this field only with the order mode of Test Results Revisions. If the sample percentage is 100%, then testing is required for every unit on the order. You cannot use Accept Percentage or Accept Quantity, since all units on the order must pass for the lot to pass.
Sample Size	The quantity of one sample to be taken for the test. As the system does not use this field, it is for your information only.
Accept Quantity	Indicates the quantity of tests that must pass in order for the test sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use this accept quantity value, you must complete the following fields on Test Definitions accordingly: 1 Display/Evaluate Blank Accept Percentage
Accept Percentage	Indicates the percentage of tests that must pass in order for the sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use the accept percentage value, you must complete the following fields on Test Definitions accordingly: Display/Evaluate 1 Accept Quantity Blank
Sample Size UOM	Identifies the unit of measure for a sample you take to test. Examples of units of measure include barrels, gallons, hours, and cubic yards.

Field	Explanation
Numeric	Determines whether a test result value will be numeric or alphanumeric. Valid values are: 1 Indicates that the result value is numeric and should be right justified. 0 Indicates that the result value is alphanumeric and should be left justified. Tests that are using alphanumeric result values can have User Defined Code tables setup that contain alpha to numeric translations. The purpose of these tables is to supply result evaluations with a way of determining whether a result is within the range of the minimum and maximum values.
Display Decimals	Designates the number of decimals in the currency, amount, or quantity fields the system displays. For example, U.S. Dollars would be 2 decimals, Japanese Yen would be no decimals, and Cameroon Francs would be 3 decimals. . . . . . *Form-specific information* . . . . . . Determines the number of decimals in minimum and maximum values and in test results entry.
System Code	A user defined code (98/SY) that identifies a J.D. Edwards system. . . . . . *Form-specific information* . . . . . . The System Code and User Defined Code are used in combination to define test results and to associate an alphanumeric test result with a number and then evaluate the test.
User Defined Codes	A code that identifies the table that contains user defined codes. The table is also referred to as a code type. . . . . . *Form-specific information* . . . . . . The System Code and User Defined Code are used in combination to define test results and to associate an alphanumeric test result with a number and then evaluate the test.
Allowed Minimum	The lowest value for a passing test result.
Target	The preferable or target test result within the test results range. As the system does not test against a target value, this field is for your information only.
Allowed Maximum	The highest value for a passing test result.
Result Unit of Measure	A user defined code (37/UM) that identifies the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.

Field	Explanation
Preferred Minimum	The lowest value for the preferred test result. This value must be greater than or equal to the allowed minimum value. Use the preferred minimum value to measure quality to a more precise specification than a customer requests. Processing options for the Certificate of Analysis (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.
Preferred Maximum	The highest value for the preferred test result. This value must be less than or equal to the allowed maximum value. Use the preferred maximum value to measure quality to a more precise specification than a customer requests. Processing options for the Certificate of Analysis (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.
Test Method	A description of how to run a quality test. The test method is useful to both your company's Quality Control department and your customers. For example, Test: Viscosity Method: RVF #4 @10RPM Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.
Property	The item attribute that is being tested.
ASTM Reference	Identifies a recommended testing procedure of the American Society of Testing Material.

Entering User Defined Codes

If you have set up alphanumeric test result values, you can set up a user defined code table that contains the alphanumeric results and their corresponding numeric values. The system uses this table to evaluate if an alphanumeric test result is within the range of minimum and maximum values.

For each user defined code, the second description column contains a numeric value that represents the value of the alphanumeric code. J.D. Edwards recommends that you use whole numbers rather than decimals in the Description-2 field. For example, for an alphanumeric test result of color, you might enter the following values:

- **Clear1** in Description and **1** in Description-2
- **Yellow2** in Description and **2** in Description-2
- **Amber3** in Description and **3** in Description-2

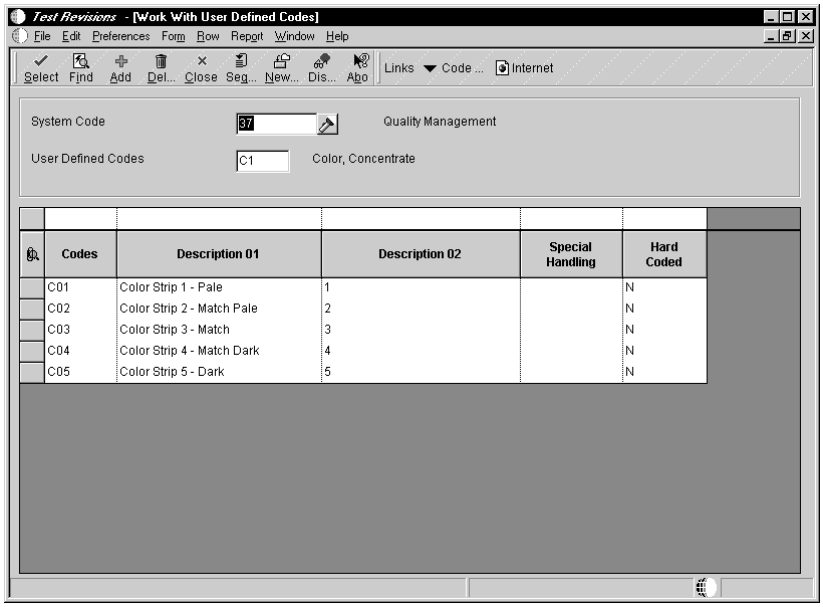
If you need to use decimals, the second description number must be in the appropriate format for your decimal environment, including the use of separators such as commas or decimals. The number of decimals defined in Test Revisions must equal the number of decimals in the user defined code table. Changing decimals after you set them up might produce unpredictable results.

▶ To enter user defined codes

From the Quality Management Setup menu (G3741), choose Test Revisions.

On Work With Test Definitions

1. To locate the test for which you need to enter user defined codes, complete the following fields and click Find:
   - Test ID
   - Branch/Plant
2. Choose the appropriate test and click Select.
3. On Test Definition Revisions, choose UDC from the Form menu.



4. On Work With User Defined Codes, complete the following fields:
   - System Code
   - User Defined Codes
   - Codes
   - Description 01

- Description 02
- Special Handling
- Hard Coded

After you have entered alphanumeric test result values, you can enter descriptive or instructional text for the test.

Codes	A column that contains a list of valid codes for a specific user defined code list. . . . . . *Form-specific information* . . . . . . A code of blank in a user defined code list indicates that a blank is a valid entry for the code. This means that the user defined code does not require a specific value to be assigned to the field on a form. Leave the character code blank and type a period in the last position of the description to set up a valid code equal to blank.
Description 02	Additional text that further describes or clarifies a field in the J.D. Edwards systems. . . . . . *Form-specific information* . . . . . . This column must contain a numeric value that represents the value of the alphanumeric code.
Special Handling	A code that indicates special processing requirements for certain user defined code values. The particular value you enter in this field is unique for each user defined code record type. The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify if the language is double-byte or if the language does not have uppercase characters. Programming is required to activate this field.
Hard Coded	A code that indicates whether a user-defined code is included as part of J.D. Edwards software and cannot be changed by a user.

Entering Text for Tests

You can enter generic text for information or instructions related to a specific test, such as sampling methods to be used. The system automatically copies the text from tests to preferences (preferences enable you to customize tests and specifications). In addition, when you enter test results, you can choose a processing option to copy information or instructions from tests or preferences to test results.

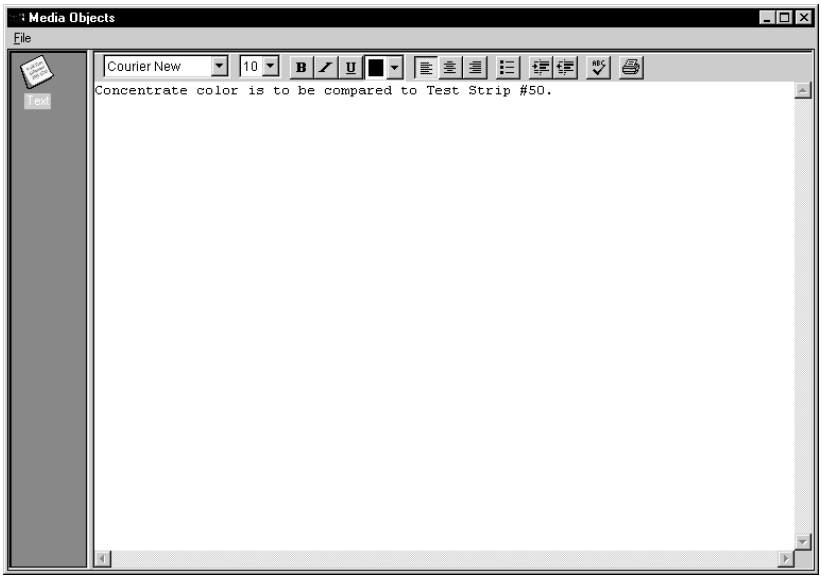
To enter text for tests

From the Quality Management Setup menu (G3741), choose Test Revisions.

On Work With Test Definitions

1. To locate the test for which you want to enter text, complete the following fields and click Find:
   - Test ID
   - Branch/Plant
2. Choose the appropriate test and choose Attachments from the Row menu.

3. On Media Objects, choose Add, then Text, from the File menu.



4. Type the appropriate text, and then choose Save & Exit from the file menu.

   A paper clip icon appears in the appropriate row on Work With Test Definitions. This indicates that there is an attachment to the test.

Reviewing Tests

After you define tests, you can review them by branch/plant and make changes if necessary.

If you use workflow approval processing, you cannot make changes to records that have a status of pending. Also, any changes that you make do not become effective until they are approved. See *Working with Approval Processing* for additional information.

See Also

- *Printing Setup Reports* for a description of the Test Definitions Report.

▶ To review tests

From the Quality Management Setup menu (G3741), choose Test Revisions.

On Work With Test Definitions

1. To locate a test, complete the following fields and click Find:

- Test ID
- Branch/Plant

2. Choose the appropriate test and click Select.
3. On Test Definition Revisions, review or change the test information as necessary.

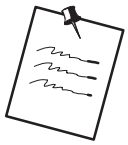
Processing Options for Test Revisions

```
Defaults

      1.  Status        1 = Pending                  _____________
      2 = History        3 = Rejected
      blank = Active/Approved

Process

      1.  Log History        1 = Log                 _____________
      History Records

Workflow

      1.  Workflow         1 = Activate              _____________
      Workflow
```

Setting Up Specifications

A specification is a group of tests that are always performed at the same time. If you sequence your tests within a specification, the tests appear in the sequenced order in your test results. Specifications can be unique to a single branch/plant or common across all branch/plants.

An example of a specification is a blending specification for a soft drink, which contains tests for caffeine, color shade, and syrup concentration. These individual tests within the specification pass or fail quality testing, not the specification itself.



You cannot customize tests within a specification. Use preferences if you need to customize tests and specifications. See *Setting Up Preferences.*

For each specification, you can define the following:

- Name and description
- Which tests to include in the specification

After you set up specifications, you can review or revise them. You can also print a test specification report.

Setting up specifications consists of the following tasks:

- ❑ Defining specifications
- ❑ Entering text for specifications
- ❑ Reviewing specifications

See Also

- *Printing Setup Reports* for a description of the Specifications Report.

Defining Specifications

As you define a specification, you determine which tests to perform at the same time.

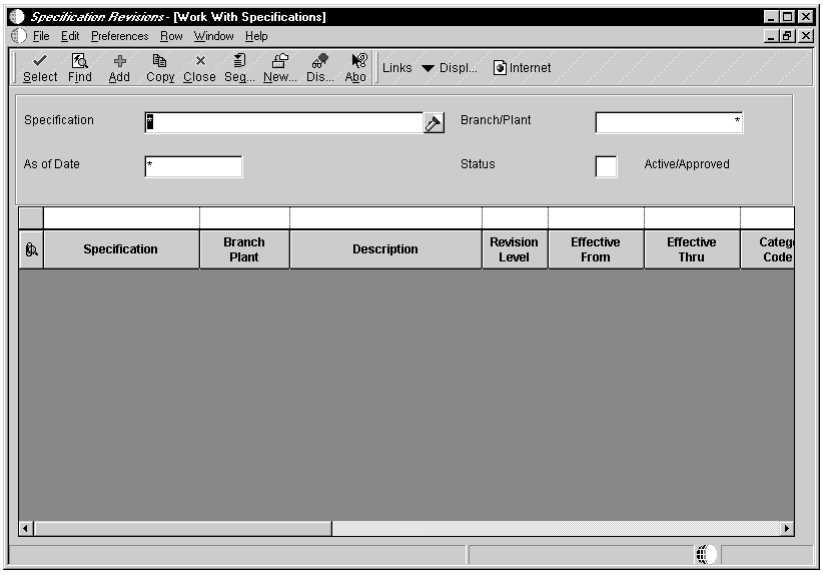
Before You Begin

- ❑ To use the approval process, set the processing option for Specification Revisions to activate workflow.
- ❑ To create historical information, set the processing option for Specification Revisions to log changes to specification definitions.

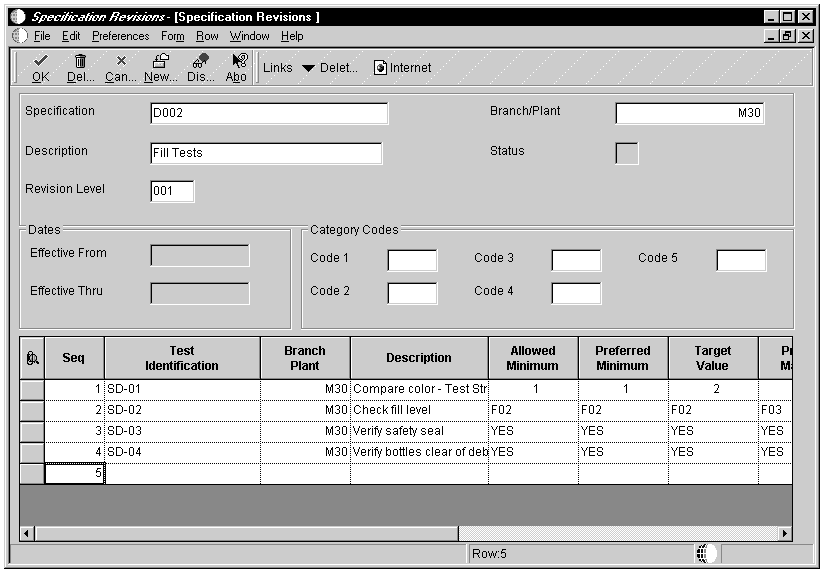
▶ To define specifications

From the Quality Management Setup menu (G3741), choose Specification Revisions.

On Work With Specifications



1. Click Add.



2. On Specification Revisions, complete the following fields:
   - Specification
   - Description
3. Complete the following optional field:
   - Branch/Plant

   If you leave the Branch/Plant field blank, the specification is valid for all branches.
4. To categorize specifications into groups, complete any of the category code fields.
5. To sequence and group the tests within a specification, complete the following fields:
   - Seq
   - Test Identification
   - Branch Plant

Field	Explanation
Seq	A number used to determine the sort order of tests and specifications within preference profiles (item/test specifications).

Entering Text for Specifications

You can enter generic text for instructions related to a specification.

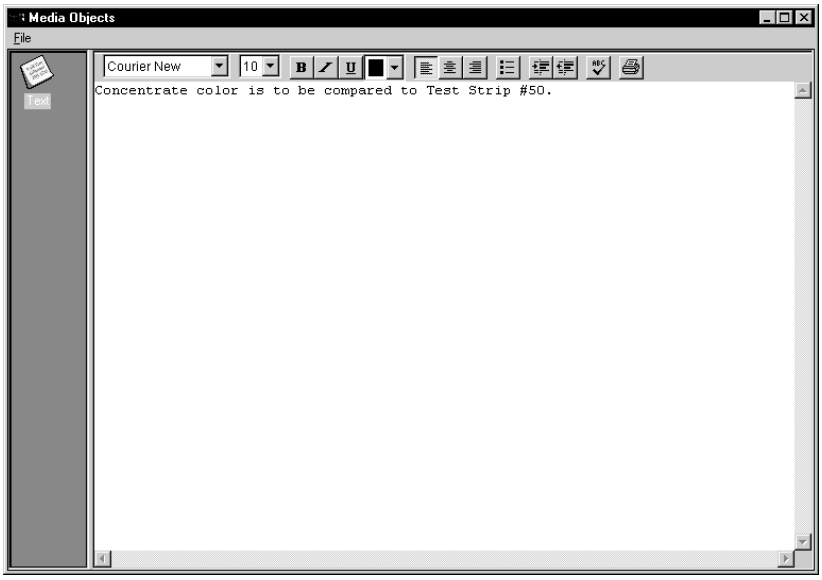
▶ To enter text for specifications

From the Quality Management Setup menu (G3741), choose Specification Revisions.

On Work With Specifications

1. To locate the specification for which you want to enter text, complete the following fields and click Find:
   - Branch/Plant
   - Specification
2. Choose the appropriate specification and choose Attachments from the Row menu.

3. On Media Objects, choose Add, then Text, from the File menu.



4. Type any additional instructions, and then choose Save & Exit from the File menu.

   A paper clip icon appears in the appropriate row on Work With Specifications. This indicates that there is an attachment to the specification.

Reviewing Specifications

After you define specifications, you can review them by branch/plant and make changes if necessary.

If you use workflow approval processing, you cannot make changes to records that have a status of pending. Also, any changes that you make do not become effective until they are approved. See *Working with Approval Processing* for additional information.

See Also

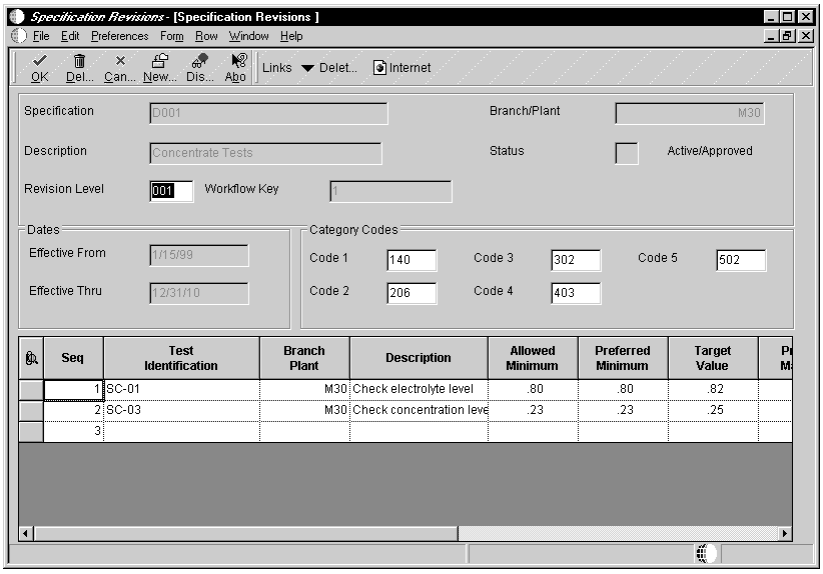
- *Printing Setup Reports* for a description of the Specifications Report.

To review specifications

From the Quality Management Setup menu (G3741), choose Specification Revisions.

On Work With Specifications

1. To locate a specification, complete the following fields and click Find:
   - Specification
   - Branch/Plant
2. Choose the appropriate specification and click Select.



3. On Specification Revisions, review or change the specification information as necessary.

Processing Options for Specification Revisions

```
Defaults

      1.  Status         1 = Pending                    _____________
      2 = History         3 = Rejected
      blank = Active/Approved

Process

      1.  Log History          1 = Log                  _____________
      History Records

Workflow

      1.  Workflow           1 = Activate               _____________
      Workflow
```

Setting Up Preferences

In Quality Management, preference profiles enable you to customize tests and specifications. A specification is a group of tests that are performed at the same time. You can use a preference profile to customize tests and specifications for any combination of customer, customer group, item (product), or item (product) group. The system uses this information to control your access to Quality Management forms from other systems.

Typically, you create preferences when you have consistent business requirements, such as the following:

- Your customers' specifications
- Your company's policies
- Regulatory agency rules

An example of a preference is a customer's test requirements for a specific item when it is received from a supplier. A customer might require a variety of tests or customized tests for this item.

An example of a specification is a blending specification for a soft drink, which contains tests for caffeine, color shade and syrup concentration. These individual tests within the specification pass or fail quality testing, not the specification itself.

Setting up preferences consists of the following tasks:

- ❑ Defining preference profiles
- ❑ Entering text for preferences
- ❑ Splitting specifications

See Also

- *Printing Setup Reports* for a description of the preference report (Item Test Specification Report).
- *Setting Up Preferences* in the *Sales Order Management Guide* for additional information on preference profiles.

Defining Preference Profiles

After you define tests and specifications, you can customize them by setting up preference profiles, referred to as preferences. Depending on how you set up the hierarchy for preference profiles, you can set up preferences for the following:

- A customer
- A customer group
- An item (product)
- An item group
- Any combination of customers and items, or groups of customers and items

You can also limit each preference to a specific branch/plant.

The system hierarchy that you set up determines which preference information appears when you enter test results.

After you define preferences, you can locate them when you revise test results and bills of material. You can also locate preferences when you review branch/plant information for items and when you enter work orders.

Before You Begin

❑ If you define tests and enter test results by customer, set up the customers in Address Book. See *Working with Address Book Records* in the *Address Book Guide.*

❑ If you define tests and enter test results by item, set up the item numbers in the Item Master and Branch/Plant tables. See *Entering Item Master Information* and *Entering Branch/Plant Information* in the *Inventory Management Guide.*

❑ If you define tests and enter test results by customer group or item group, set up the groups. See *Assigning Customers and Items to Groups* in the *Sales Order Management Guide.*

❑ Set up the hierarchy for preference profiles. See *Working with the Preference Master and Hierarchy* in the *Sales Order Management Guide.*

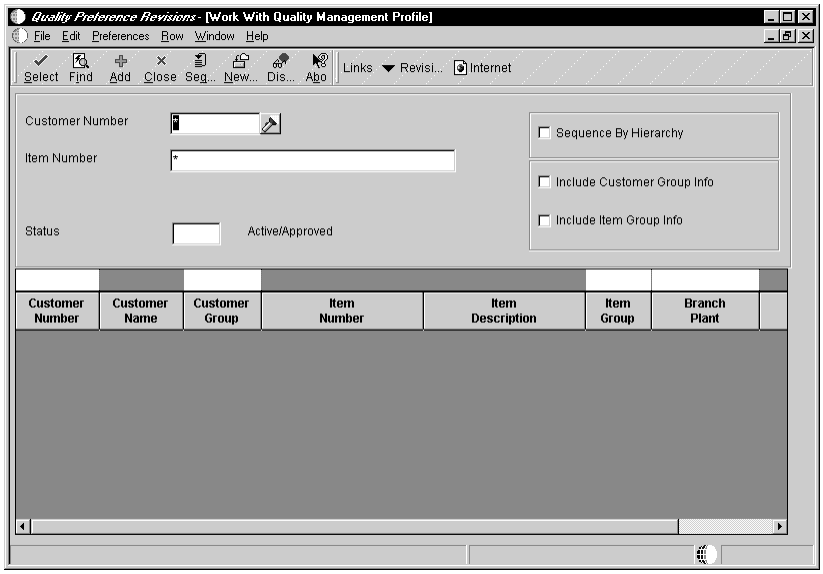
❑ To use the approval process, set the processing option for Quality Preference Revisions to activate workflow.

❑ To create historical information, set the processing option for Quality Preference Revisions to log changes to preference profiles.

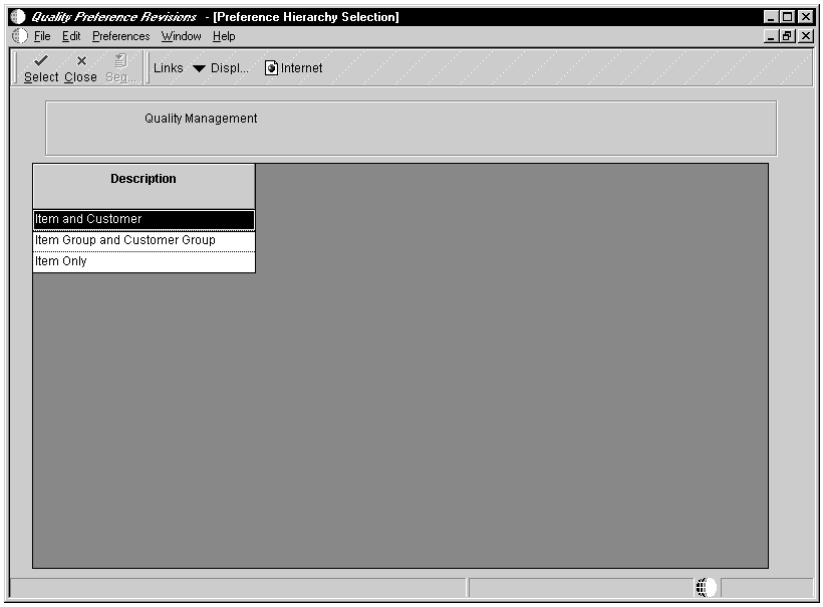
To define preference profiles

From the Quality Management Setup menu (G3741), choose Quality Preference Revisions.

On Work With Quality Management Profile

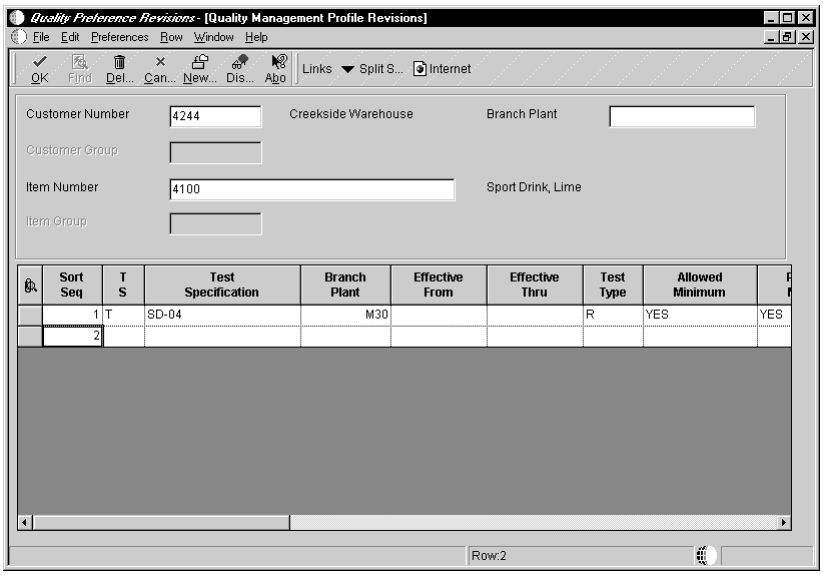


1. Click Add.



2. On Preference Hierarchy Selection, choose a hierarchy and click Select.

   The hierarchy that you choose determines the fields in the header area that you complete for the preference.



3. On Quality Management Profile Revisions, complete one or all of the following fields, depending on your hierarchy:

   - Customer Number
   - Customer Group
   - Item Number
   - Item Group

4. Complete the following fields to define the tests and specifications that make up the preference:

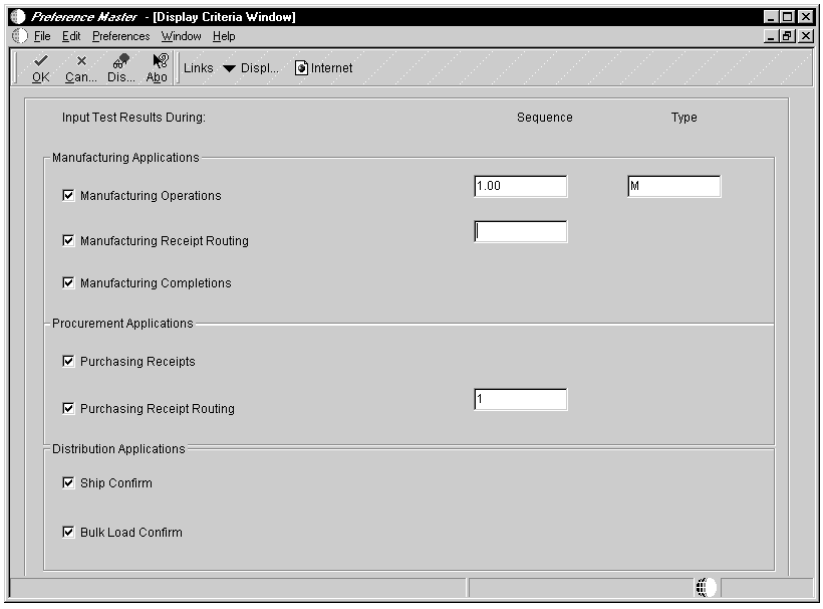
   - Sort Seq
   - T S

     If you enter a test specification value of T, you can override testing and sampling information from the original test definition by completing the appropriate fields. If you override this information, the preference displays the override values. Otherwise, the preference displays the default values.

   - Test Specification
   - Branch Plant
   - Test Type

- Allowed Minimum Value
- Preferred Minimum Value
- Target
- Preferred Maximum Value
- Allowed Maximum Value
- Result UM
- Display Dec
- Property
- Test Method
- Number of Samples
- Sample Percent
- Accept Quantity
- Accept Percent
- Print Test

5. Choose a row that you completed and choose Display Criteria from the Row menu.



6. On Display Criteria Window, you can customize the display criteria for each row that you entered on Quality Management Profile Revisions.

   Verify the system default values for those programs for which you want to perform quality testing. You can access the field help to see the specific programs that will be affected. If you do not want to perform quality testing for a particular program, be sure to turn it off (no check mark).

   For example, to enter test results during Work Order Inventory Completions, verify that Manufacturing Completions is checked. This activates Test Results Revisions when you enter a work order completion.

   Use the fields located in the Sequence and Type columns to further define where a test is available for results entry, such as during a specific step in a receipt routing.

   You can change the settings on the following options and fields:

   - Manufacturing Operations
   - Sequence Number – Operations
   - Type
   - Manufacturing Receipt Routing
   - Sequence Number – Operations
   - Manufacturing Completions
   - Purchasing Receipts
   - Purchasing Receipt Routing
   - Sequence – Bubble Sequence
   - Sequence
   - Ship Confirm
   - Bulk Load Confirm
7. Click OK.
8. Repeat steps 5 through 7 for each row that you entered on Quality Management Profile Revisions.

Field	Explanation
Customer Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other address book members.
Item Number	A number that the system assigns to an item. It can be in short, long, or third item number format.

Field	Explanation
Sort Seq	A number used to determine the sort order of tests and specifications within preference profiles (item/test specifications).
T S	Code used to indicate whether a record within preference profiles (item/test specifications) is a test or specification. Valid values for entry are: T Test S Specification
Test Specification	The unique identification for a test to be performed on an item. For example: COL Color test DENS Density Test CL–2 Clarity Test
Branch Plant	A business unit is an accounting entity, such as a profit center, department, warehouse location, job, project, workcenter, and so on, required for management reporting.
Test Type	Controls how the system processes tests as you enter test results. For example: R Required – Result values are required during Results Entry. The system does not allow an item to pass quality inspection until you enter results for each required test. O Optional – Result values are optional during Results Entry. The system does not require the entry of a result for each optional test. However, if you input failing results, the item fails quality inspection. G Guaranteed – Result values are optional during Results Entry. You can control whether Guaranteed tests appear as you enter test results with the 'Display Test' field on Test Revisions. In addition, guaranteed tests print on the Certificate of Analysis.
Allowed Minimum Value	The lowest value for a passing test result.
Preferred Minimum Value	The lowest value for the preferred test result. This value must be greater than or equal to the allowed minimum value. Use the preferred minimum value to measure quality to a more precise specification than a customer requests. Processing options for the Certificate of Analysis (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.
Target	The preferable or target test result within the test results range. As the system does not test against a target value, this field is for your information only.

Field	Explanation
Preferred Maximum Value	The highest value for the preferred test result. This value must be less than or equal to the allowed maximum value. Use the preferred maximum value to measure quality to a more precise specification than a customer requests. Processing options for the Certificate of Analysis (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.
Allowed Maximum Value	The highest value for a passing test result.
Result UM	A user defined code (37/UM) that identifies the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.
Display Dec	Designates the number of decimals in the currency, amount, or quantity fields the system displays. For example, U.S. Dollars would be 2 decimals, Japanese Yen would be no decimals, and Cameroon Francs would be 3 decimals.
Property	The item attribute that is being tested.
Test Method	A description of how to run a quality test. The test method is useful to both your company's Quality Control department and your customers. For example, Test: Viscosity Method: RVF #4 @10RPM Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.
Number of Samples	The number of samples to be taken for the test.
Sample Percent	The percentage of an order quantity that determines the number of samples to create in Test Results Revisions. For example, if the sample percentage is 50 percent and the order quantity is 10, then 5 samples will be created in Test Results Revisions. Use either this field or Number of Samples to control how many samples to create. You can use this field only with the order mode of Test Results Revisions. If the sample percentage is 100%, then testing is required for every unit on the order. You cannot use Accept Percentage or Accept Quantity, since all units on the order must pass for the lot to pass.
Accept Quantity	Indicates the quantity of tests that must pass in order for the test sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use this accept quantity value, you must complete the following fields on Test Definitions accordingly: 1 Display/Evaluate Blank Accept Percentage

Field	Explanation
Accept Percent	Indicates the percentage of tests that must pass in order for the sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use the accept percentage value, you must complete the following fields on Test Definitions accordingly: Display/Evaluate 1 Accept Quantity Blank
Print Test	A code used to determine whether or not a test will print on the Certificate of Analysis. The valid values are: 0 The test will not print on the Certificate of Analysis. 1 Print all occurrences of a test on the Certificate of Analysis. 2 Print just the average test result record when printing the Certificate of Analysis. 3 Print the last occurrence of a test when printing the Certificate of Analysis. The last occurrence will be the test results record that was entered last using Test Results Revisions.
Manufacturing Operations	Controls whether a test will display on the Test Results Revisions form when you access test results from any of the following Manufacturing programs: • Co/By Product Completions (P31115) • Super Backflush (P31123) • Work Order Employee Time Entry (P311221) Valid values are: 1 The test will appear in Test Results Revisions. 0 The test will not appear in Test Results Revisions. You can use this value with the operation sequence and routing type to control the appearance of the test at an operation or routing type.

Field	Explanation
Sequence Number – Operations	In routings, use this number to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation. In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Management system uses this field in the backflush/preflush by operation process. In engineering change orders, use this number to sequence the assembly steps for the engineering change. In Repetitive Manufacturing, this number identifies the sequence in which an item is scheduled to be produced. Skip To fields allow you to enter an operation sequence that you want to begin the display of information. You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.
Type	User defined code (system 40, type TR) that designates the type of routing. You can define different types of routing instructions for different uses. For example: M Standard Manufacturing Routing RWK Rework Routing RSH Rush Routing You define the routing type on the work order header. The specific type of routing defined will then be used in the work order routing. Product Costing and Capacity Planning systems use only M type routings.
Manufacturing Receipt Routing	Controls whether a test will display on the Test Results Revisions form when you access test results from the Routing Movement and Disposition (P43250) program when the routed order is a manufacturing work order. Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions. You can use this value with the operation sequence to control the appearance of the test at a route operation.
Sequence Number – Operations	The sequence in which the system performs the operations or steps of the route.

Field	Explanation
Manufacturing Completions	Controls whether the test will display on the Test Results Revisions form when you access test results from either of the following Manufacturing programs: • Work Order Inventory Completions (P31114) • Completions Workbench (P3119) Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.
Purchasing Receipts	Controls whether a test will display on the Test Results Revisions form when you access test results from either Receipts by P/O or Receipts by Item (P4312). Valid values are: 1 The test will appear in Test Results Revisions. 0 The test will not appear in Test Results Revisions.
Purchasing Receipt Routing	Controls whether the test will display on the Test Results Revisions form when you access test results from Routing Movement and Disposition (P43250) and the routed order is a purchase order. Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions. You can use this value with the operation sequence to control the appearance of the test at an operation.
Sequence – Bubble Sequence	A secondary bill of material sequence number to indicate the drawing bubble number.
Ship Confirm	Controls whether the test will display on the Test Results Revisions form when you access test results from the Ship Confirmation (P4205) program. Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.
Bulk Load Confirm	Controls whether the test will display on the Test Results Revisions form when you access test results from one of the following programs: • Bulk Confirm by Order or Bulk Confirm by Trip (P49510) • Packaged Load Confirmation (P49530) Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.

Entering Text for Preferences

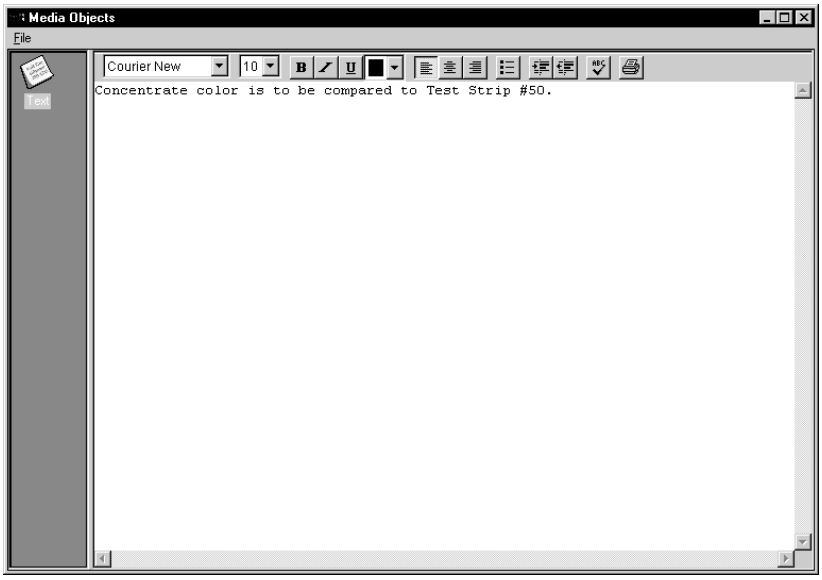
After you define a preference, you can attach text that provides additional detail. For example, you might want to explain sample collection methods and tools.

To enter text for preferences

From the Quality Management Setup menu (G3741), choose Quality Preference Revisions.

1. On Work With Quality Management Profile, complete the following fields and click Find:
   - Customer Number
   - Item Number
2. Choose the appropriate preference and click Select.
3. On Quality Management Profile Revisions, choose the appropriate test or specification and choose Attachments from the Row menu.

4. On Media Objects, choose Add, then Text, from the File menu.



5. Type any additional instructions, and then choose Save & Exit from the File menu.

   A paper clip icon appears in the appropriate row on Quality Management Profile Revisions. This indicates that there is an attachment to the preference.

Splitting Specifications

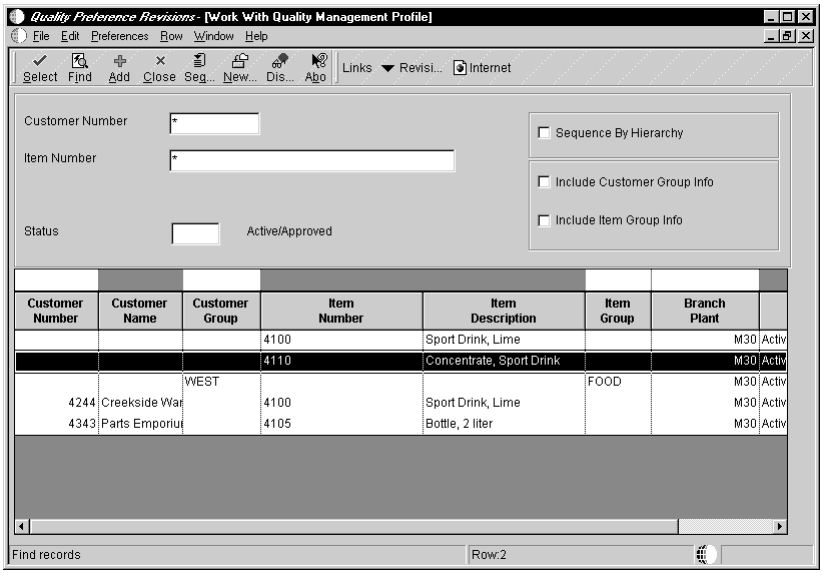
After you define a preference, you can split a specification to view its corresponding group of tests. You also might split a specification if you need to override test definition values, which sets the test specification value to T. You cannot override these values if the test specification value is set to S.

If you split a specification, you cannot re-assemble it. If you need to do this, you must delete the preference, then re-create it.

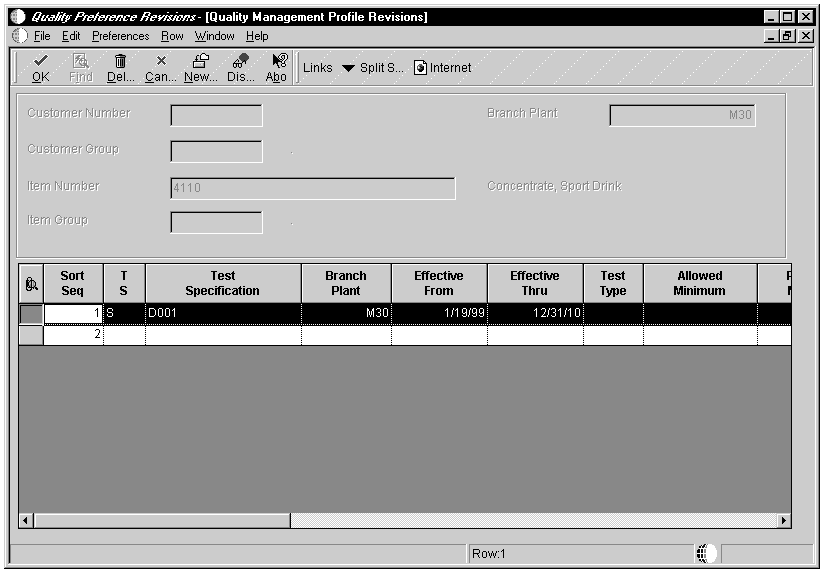
To split specifications

From the Quality Management Setup menu (G3741), choose Quality Preference Revisions.

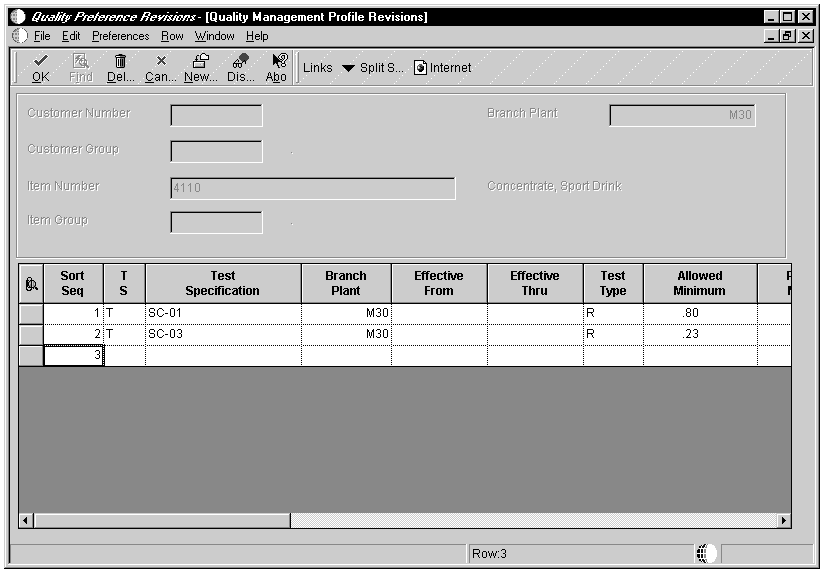
On Work With Quality Management Profile



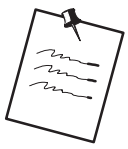
1. Complete the following fields and click Find:
   - Customer Number
   - Item Number
2. Choose a specification and click Select.



3. On Quality Management Profile Revisions, choose a record and then choose Split Spec from the Row menu.



4. Review the separate tests for this specification. You can override test definition values if necessary.



If you use workflow approval processing, you cannot make changes to records that have a status of pending. Also, any changes that you make do not become effective until they are approved. See *Working with Approval Processing* for additional information.

Processing Options for Preference Profile Quality Management

```
Defaults

      1.  Status       1 = Pending                    _____________
      2 = History       3 = Rejected
      blank = Active/Approved

Process

      1.  Log History        1 = Log                  _____________
      History Records

Workflow

      1.  Workflow         1 = Activate               _____________
      Workflow
```

Working with Approval Processing

If you need to approve changes to tests, specifications, and preferences, you can activate workflow approval processing and then use the Approvals Workbench to route changes through an automated approval process.

You activate workflow approval processing by setting the appropriate processing options for the following programs:

- Test Revisions
- Specification Revisions
- Quality Preference Revisions

The Approvals Workbench is especially useful for streamlining an approval process that involves a large number of changes. The system displays all approval messages for a specific approver, enabling the approver to answer them collectively.

When you activate workflow, changes to any fields trigger the workflow approval process. All revision transactions begin with a status of pending. Designated approvers then review the changes and approve or reject them. For example, you might need to reject changes to the allowed minimum and maximum values for a passing test result, due to customer requirements.

If you reject a revision, the system sends a message to the originator about the rejection. If you approve a revision, the system applies the changes and sends a message to the originator about the approval.

You cannot change pending, rejected, or history records. If you attempt to change a pending record, the system displays a message that an approval is pending.

The current software release assigns but does not use effectivity dates for active (approved) records. Revision levels on specifications are for information only.

Working with Approval Processing consists of the following tasks:

- ❑ Revising tests, specifications, and preferences
- ❑ Approving revisions

Before You Begin

❑ Set up workflow processing. See *Creating Workflow Processes* in the *Enterprise Workflow Management Guide*.

Revising Tests, Specifications, and Preferences

Once you set them up, you can revise tests, specifications, and preferences. Note the following considerations:

- If you do not activate workflow processing, any changes that you make are effective immediately.
- If you activate workflow processing, changes are not effective until they have completed the workflow process. You can change only active records if no pending approvals are in progress.
- If you activate logging, the system saves history records for all changes. You do not need workflow to be activated in order to log history information.

This procedure assumes that you are using workflow processing.

Before You Begin

❑ Check the processing options for the following programs to ensure that workflow processing is activated:

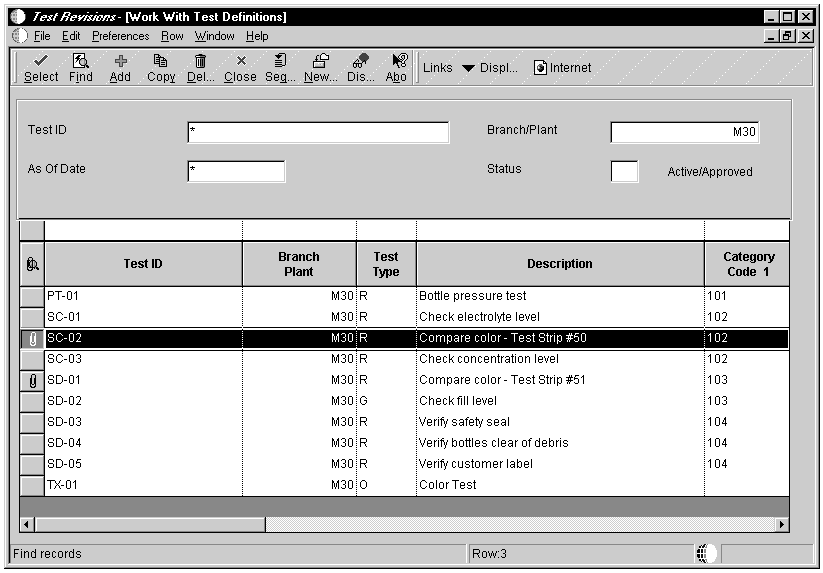
- Test Revisions (P3701). See *Setting Up Tests*.
- Specification Revisions (P3702). See *Setting Up Specifications*.
- Quality Preference Revisions (P40318). See *Setting Up Preferences*.

▶ **To revise tests, specifications, or preferences**

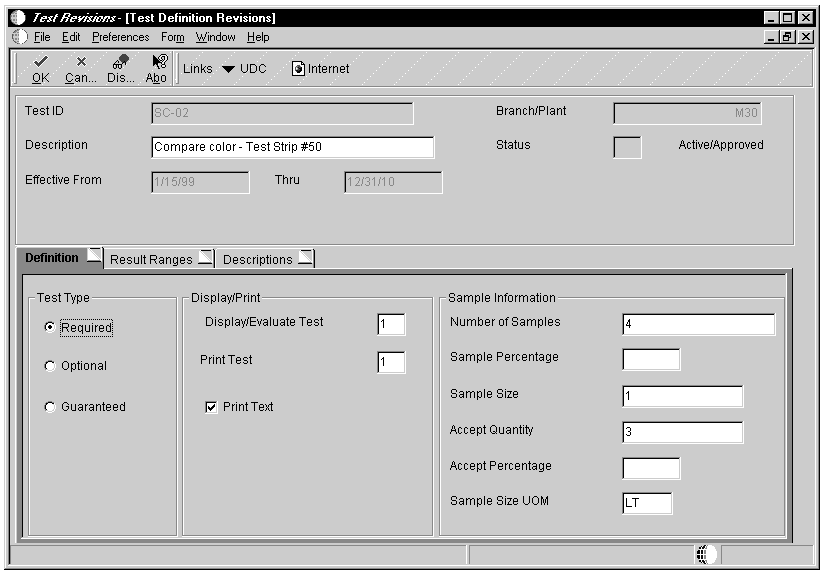
From the Quality Management Setup menu (G3741), choose Test Revisions.

The steps for revising tests, specifications, and preferences are basically the same. This procedure provides the steps for revising tests as an example.

On Work With Test Definitions



1. To locate the test that you want to revise, complete any of the following fields and click Find:
   - Test ID
   - Branch/Plant
2. Choose the appropriate test and click Select.



3. On Test Definition Revisions, revise the test information as necessary and click OK.

   With the workflow processing option active, clicking OK initiates the approval process.

Approving Revisions

After you revise a test, specification, or preference, the system sends approval messages to the members of the distribution list who then use the Approvals Workbench to approve or reject revisions.

You can also use the Employee Work Center to approve or reject Quality Management revisions. See *Working with Messages* in the *OneWorld Foundation Guide*.

On the workbench, you can approve or reject multiple revision requests without having to access the approval form for each request. Once approved or rejected, the requests no longer appear on the Approvals Workbench or in your Work Center message queue.

Before You Begin

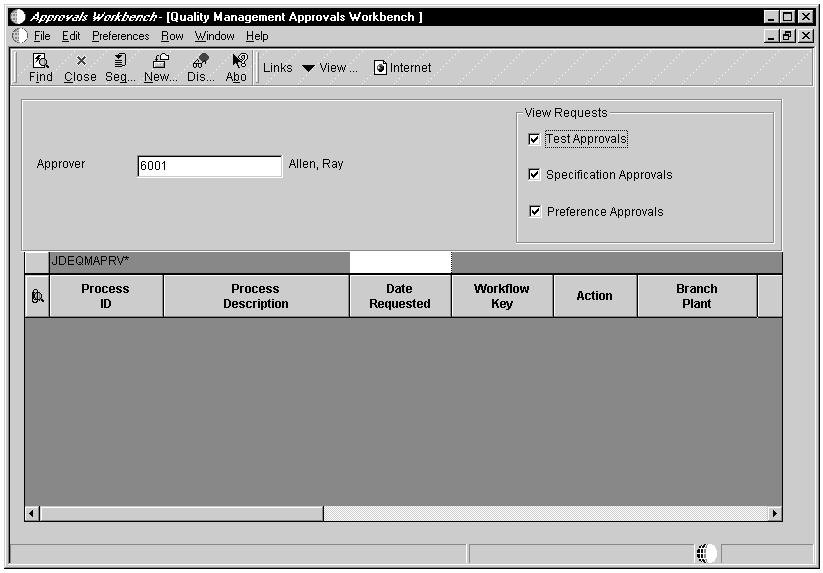
- ❑ In Workflow Management, set up distribution lists for approvers of changes to tests, specifications, and preferences.
- ❑ Use OneWorld security to assign permissions to the Approver field on the Approvals Workbench.

▶ To approve revisions

From the Quality Management Setup menu (G3741), choose Approvals Workbench.

The steps for approving tests, specifications, and preferences are basically the same. This procedure provides the steps for approving a test revision as an example.

On Quality Management Approvals Workbench



1. To review pending approvals, complete the following fields and click Find:
   - Approver
   - Test Approvals
2. Before you approve a revision, choose the following options to review additional information:
   - To view the details of a requested test revision, choose the record and then choose View Request from the Row menu.
   - To view the original test definition, choose the record and then choose View Original from the Row menu.
3. To approve a test revision, choose the appropriate test and choose Approve from the Row menu.

   The system removes the approved revision from the list of pending approvals. After all required members of the distribution list approve the revision, the system converts the status of the record from pending to active and sends a message to the originator of the approved request. If you log revisions, the system also creates a history record.

4. To reject a test revision, choose the appropriate test and choose Reject from the Row menu.

   You should also enter text explaining why you rejected the requested revision.

   If a required member of the distribution list rejects the revision request, the system converts the status of the record from pending to rejected and sends a message to the originator of the rejected request.

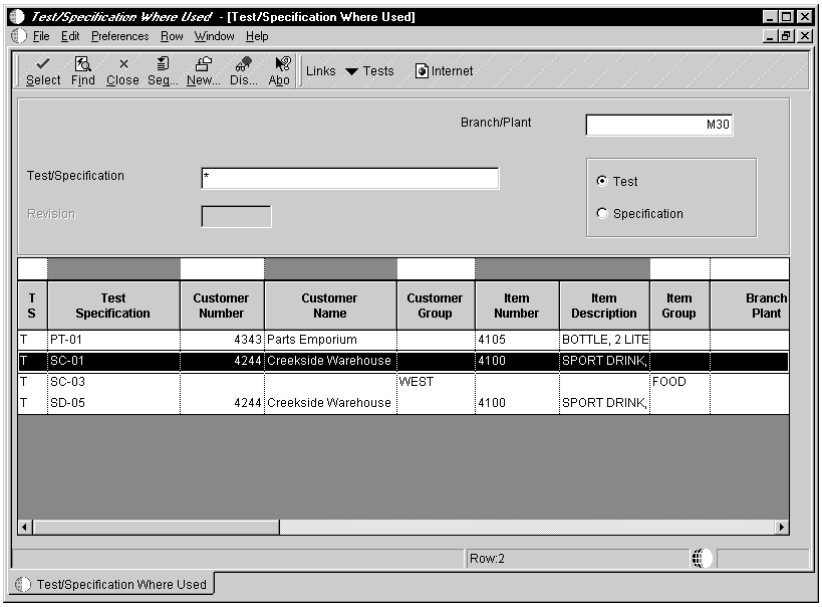
Reviewing Tests and Specifications

You can use the Test/Specification Where Used program to identify which preference profiles contain a specific test or specification for quality testing. You can also use this program to review or revise preference profiles, specifications, or tests.

▶ To review tests and specifications

From the Quality Management Setup menu (G3741), choose Test/Specification Where Used.

On Test/Specification Where Used

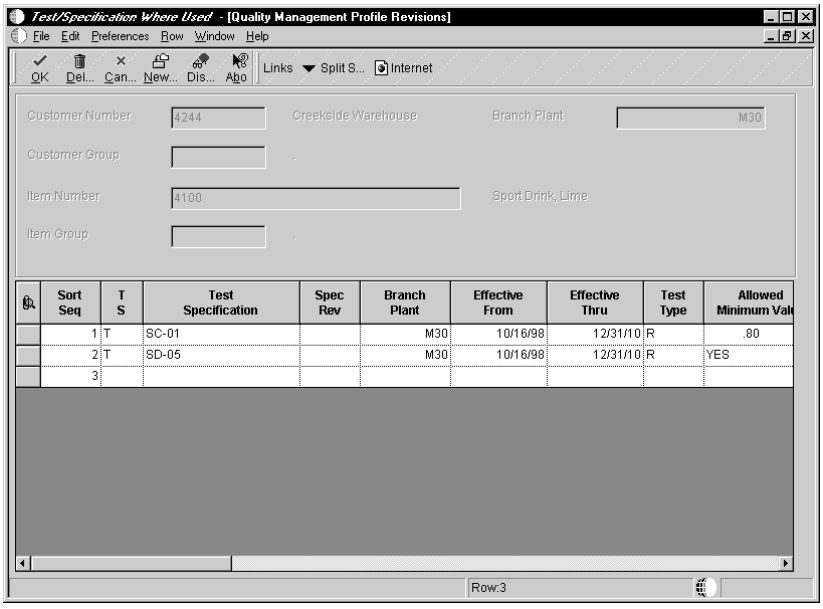


1. To locate a test or specification, complete the following fields:

   - Branch/Plant
   - Test/Specification

   You can review a specific test or specification for all of your branch/plants by typing * in the Branch/Plant field. You can review all tests and specifications by typing * in the Test/Specification field.

2. To indicate a test or specification, click the following option:
   - T S
3. If you are locating a specification, complete the following optional field:
   - Revision
4. Click Find.
5. Choose the appropriate test or specification and choose Preferences from the Row menu.



6. On Quality Management Profile Revisions, review or change the preference information.
7. If you need to make other changes, select the record that you want to change, then choose an option from the Row menu.

Field	Explanation
T S	Code used to indicate whether a record within preference profiles (item/test specifications) is a test or specification. Valid values for entry are: T Test S Specification
Revision	An alphanumeric character that represents the number of times a specification has changed. To avoid overlapping revisions, the system verifies that the start dates of revisions are greater than the end dates of other revisions.

Setting Up Inclusion Rules for Test Results Tracing

To trace test results, you must set up inclusion rules. Inclusion rules are user defined codes. When you trace test results for a specific lot, these codes enable you to limit the item ledger transactions that the system processes. You can review which lots are within a parent lot and all tests for the parent lot as well as the individual lots. Tracing helps you find test results for components of an assembled item or for an item that has been re-classified.

The system traces a lot by associating corresponding transactions, such as receipts, issues, completions, and sales orders. If you do not include the documents in the inclusion rules, the system stops tracing the lot. For example, if you do not include the completion document type in inclusion rules, the system stops tracing at the completion transaction.

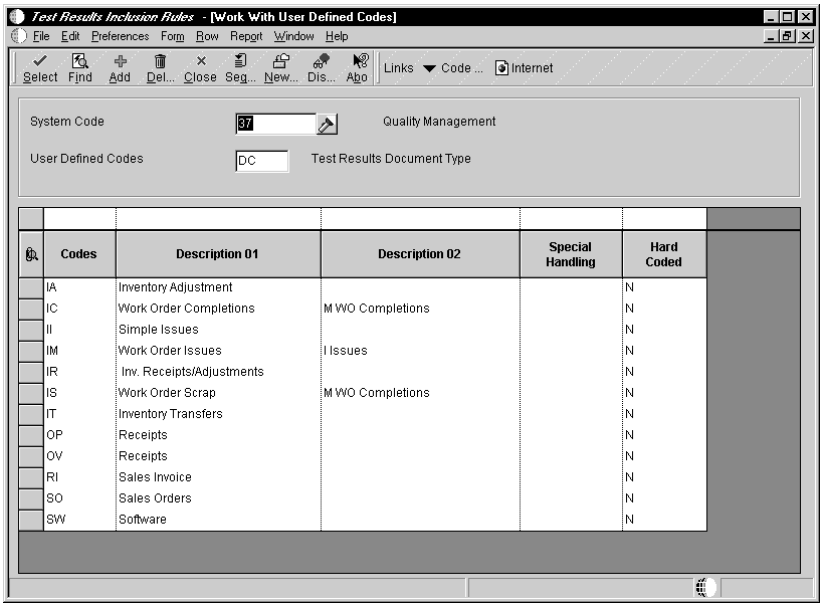
See Also

- *Tracing Test Results*

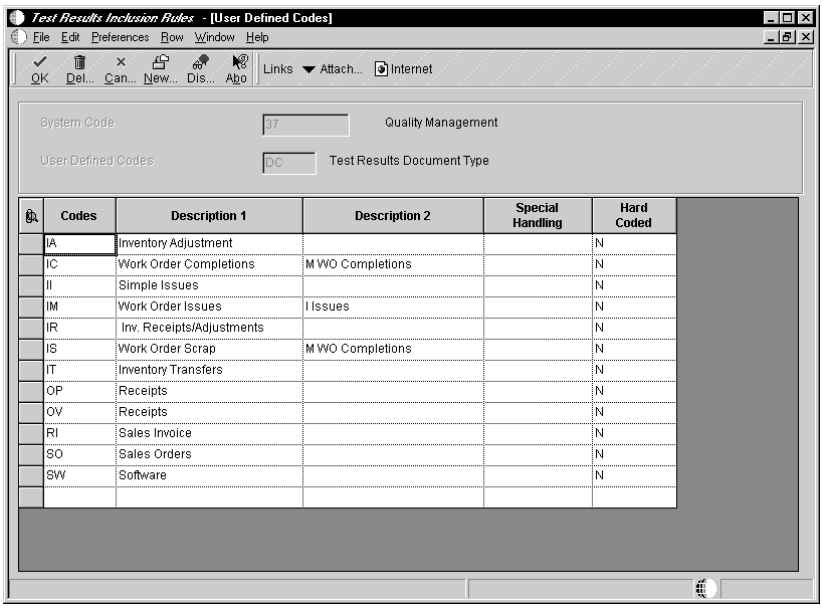
To set up inclusion rules for test results tracing

From the Quality Management Setup menu (G3741), choose Test Results Inclusion Rules.

On Work With User Defined Codes



1. Click Add.



2. On User Defined Codes, complete the following fields for each document type:

- Codes
- Description 1
- Description 2

  The format for the Description 2 field is one character, followed by a space and a description.

- Special Handling
- Hard Coded

Field	Explanation
Description 2	If you are entering user defined codes on Test Results Inclusion Rules, the first character of the Description 02 field controls how a transaction is used to trace test results. Valid values are: M WO Completions (or WO Scrap) I Issues T Inventory Transfers or Reclassifications C Termination Level (tracing stops at this level)

Setting Up Customer Billing Instructions

If you use the J.D. Edwards Sales Order Management system, you must use customer billing instructions to indicate whether customers should receive a Certificate of Analysis.

A Certificate of Analysis is a document that lists the tests and test results for item lots sold to a customer.

Before You Begin

- ❑ Ensure that you have set up tests with the appropriate Print Test values to control which tests print on the Certificate of Analysis. See *Defining Tests.*

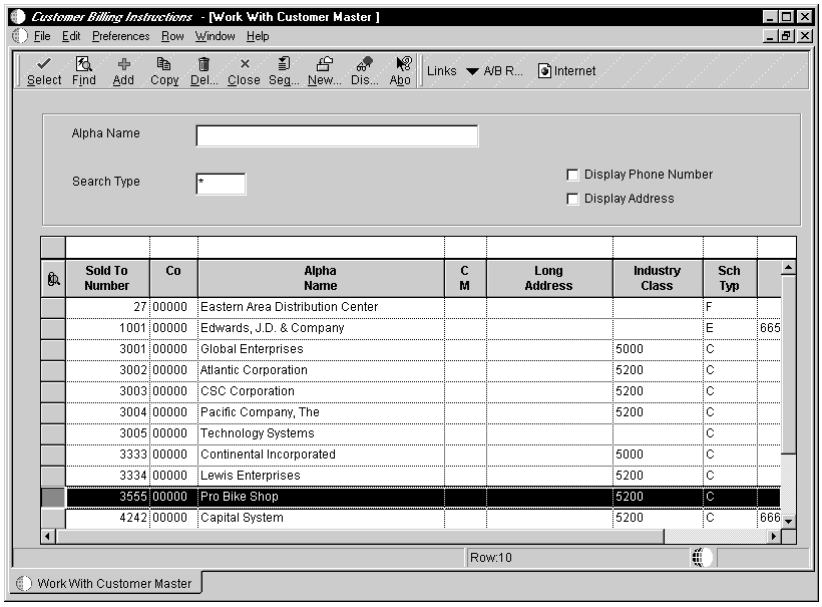
See Also

- *Printing Test Results Reports* for a description of the Certificate of Analysis.

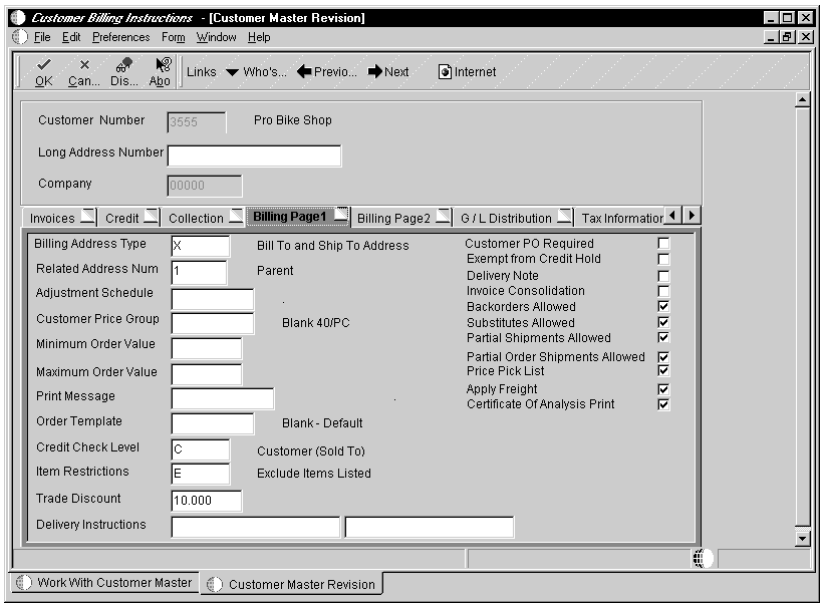
To set up customer billing instructions

From the Customer Revisions menu (G4221) in Sales Order Management, choose Customer Billing Instructions.

On Work With Customer Master



1. To locate a specific customer, complete the following fields and click Find:
   - Alpha Name
   - Search Type
2. Choose the appropriate customer and click Select.



3. On Customer Master Revision, click the Billing Page 1 tab and then click the following option:

    - Certificate Of Analysis Print

Field	Explanation
Search Type	A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists T Tax authority
Certificate Of Analysis Print	Use this code to indicate that the system should print a certificate of analysis (COA) for the customer. The valid values are: Y allows the printing of the COA N prevents a COA from printing for a specific customer when the COA report is run for a group of customers. NOTE: This feature is only activated when the Quality Management System is in use and the COA is created.

Test Results Processing

Test Results Processing

After you set up the Quality Management system, you collect samples and perform quality tests at the points in your business cycle defined in a preference profile. Then you enter and review the test results for an item. An example of a test result is a 0.20 percent syrup result for a sample of a soft drink being tested for syrup concentration.

You can process test results from within the Quality Management system. You can also access Quality Management from other systems when you perform the following tasks:

- When you enter a receipt for an item on a purchase order
- When you record the movement of a received item at any operation sequence during purchasing receipts routing
- When you record completions at operations during the manufacturing process
- When you complete the item after the manufacturing process and move it into stock
- When you enter a sales order
- During ship confirmation

The following programs access Quality Management information:

Shop Floor Management	• Work Order Entry • Work Order Completions • Super Backflush • Work Order Employee Time Entry
Procurement	• Receipts by P/O Item/Account • Routing Movement/Status
Distribution	• Ship Confirmation

See Also

- *Defining Preference Profiles*

Test results processing consists of the following tasks:

❑ Working with test results

- ❑ Reviewing test results

Working with Test Results

You collect test results after you measure the quality of an item characteristic. For example, a caffeine test for a soft drink includes taking a sample of the item and measuring for caffeine levels.

After you collect and enter test results at various points in your business cycle, you process the results. The system compares the results to the minimum and maximum values and the acceptable quantity or percentage that you previously defined for the test. Based on how many samples pass or fail, the system evaluates the lot to determine whether it passes or fails quality inspection. The system then sets the lot status to the value that you defined in the processing option for failed lot status.

Working with test results consists of the following tasks:

- ❑ Selecting tests for results entry
- ❑ Entering test results
- ❑ Entering text for test results
- ❑ Overriding test status
- ❑ Creating new samples
- ❑ Working with external test results

The topics that follow explain the terminology used with test results, the sample numbering system, and how you can use test results with various programs.

Terminology

In order to work with test results, you need to understand the following terms:

- Test entry format
- Lot status

You can enter test results in preference format or order number format. The format depends on how you set the Results Entry Format processing option for Enter Test Results. The system uses header information to select tests and samples through preference profiles. The test entry formats organize test results as follows:

Preference format	Organizes test results by branch/plant and customer number, customer group, item number, or item group.
Order number format	Organizes test results by work order, sales order, or purchase order numbers.

When you add test results for the first time in order number format, you cannot use the menu. You must access Test Results Revisions from an order processing program, such as a Shop Floor Management program for processing work orders. This enables the system to select the appropriate tests from preference profiles.

The lot status indicates whether a lot is on hold or available for shipping. For example, to fill a sales order, you might need to search for a tested lot that meets a customer's specifications. If a lot passes quality inspection and meets the specifications, it is available for shipment to that customer.

For information on searching for tested lots for sales orders, see *Additional Order Processing During Shipment Confirmation* in the *Sales Order Management Guide.*

The lot status depends on the processing option settings for failed and passed lots, as follows:

If you set processing options for failed and passed lot status:	The system prevents lots from being sold or shipped until you finish testing and the lots pass inspection. • To hold lots that have either failed quality inspection or have not yet been tested, set the lot to a non-blank status as soon as it is brought into inventory. You might use a status of Q for awaiting quality testing. This prevents the lot from being chosen by Sales Order Entry or Ship Confirm. • If the lot fails inspection, you might change the status to F for failed inspection. • After the lot passes inspection, you can change the status to blank to indicate that it is available.
If you do not set processing options for failed and passed lot status:	The system allows lots to be sold or shipped. Any program that selects items from inventory can choose the lots, because the system considers them to be available.

The system allows free-form entry of test results for tests that are:

- Alphanumeric (Numeric check box on Test Definition Revisions = Blank), and
- Are not set up with a user defined code table.

For tests that are not set up with a user defined code table, any value other than blank in the test result passes.

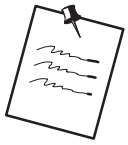
Sample Numbering

The Quality Management system provides a unique numbering system for samples when you enter test results. To track test results to a specific sample, you can enable the system to use Next Numbers to assign sample numbers. You can also override a system-assigned number. If you do not set the processing option for sample numbering, you must enter a sample number for each test result.

If you need to perform a re-test, you can either assign an existing sample number or a new sample number to the new test results, depending on whether you collected a new sample. If you perform a re-test on the original sample, you can assign a duplicate sample number for the test.

If you load external test results from a third party system, the Quality Management system only assigns unique sample numbers if they have not been provided by the inbound data.

For the current release, sample numbers are numeric only.



Do not confuse the sample number with the number of samples. The sample number identifies a group of tests within the same sample, such as 50002. The number of samples indicates how many samples to take for a test, such as 3.

System Integration

Depending on how you set up preference profiles, you can access Test Results Revisions from the following programs:

- Work Order Inventory Completions
- Work Order Hours and Quantities Entry
- Rate Schedule Workbench
- Sales Order Ship Confirm
- Purchase Order Receipts
- Move and Disposition

The following table explains how you can use test results with various program functions:

Work Order Entry	When you create a work order, you can: • Use Preference Profiles to maintain tests for the parent item • Enter generic text to indicate when to test materials and which test to use
Work Order Completions	When you enter work order completions, including quantity completed and quantity scrapped, you can: • Access Test Results Entry for any items requiring testing upon completion • Review work order generic text • Set processing options for default lot, work order, and operation status
Super Backflush	When you backflush labor and material for a work order, you can: • Access Test Results Entry for any items that require testing • Review generic text for the parent item and operations
Hours and Quantities	When you charge actual hours and quantities to a work order, you can: • Access Test Results Entry for completed items that require testing • Review generic text for the parent item • Set processing options for work order status and operation status
Bill Revisions	When you maintain bills of material, you can: • Enter generic text to indicate the various tests to perform on an item • Use Preference Profiles to maintain tests for the parent item
Receipts by PO/Item/Account	When you receive items, you can access Test Results Entry for items that require testing.
Routing Receipts	When you review the location of goods within the receipts routing process and move them to another operation, you can access Test Results Entry for items that require testing.

Sales Orders When you enter sales orders, you can use the Item Search to select the lot that meets the quality criteria for the customer and item on the sales order.

Selecting Tests for Results Entry

You can enter test results for an item and lot from the Quality Management system menu or from many programs within the Manufacturing and Distribution systems. If you access Test Results Revisions from another Manufacturing or Distribution program, the system completes the test header information. The system uses the header information to select the correct set of tests for results entry.

Entering test results is a two-part process. First, you select the appropriate tests (this procedure). Then you enter the results for these tests (described in *Entering Test Results).*

Selecting tests for results entry consists of the following tasks:

- Selecting tests in preference format
- Selecting tests in order number format

Before You Begin

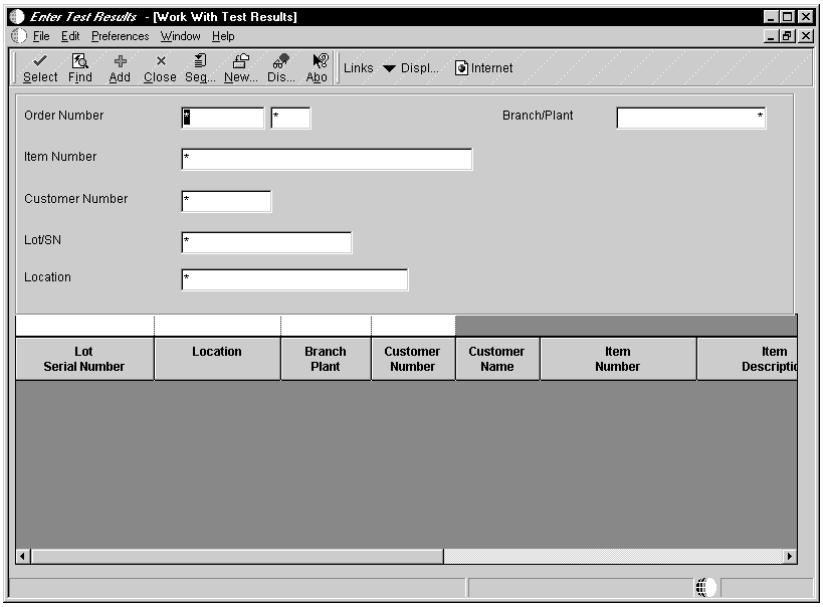
❑ Set the following processing options for Enter Test Results (P3711):

- Results Entry Format, to determine preference or order number format
- Status for a Failed Lot, to determine the lot status for failed lots
- Status for a Passing Lot, to determine the lot status for passing lots
- Activate System Sample Numbering, to activate system-assigned sample numbers (optional)

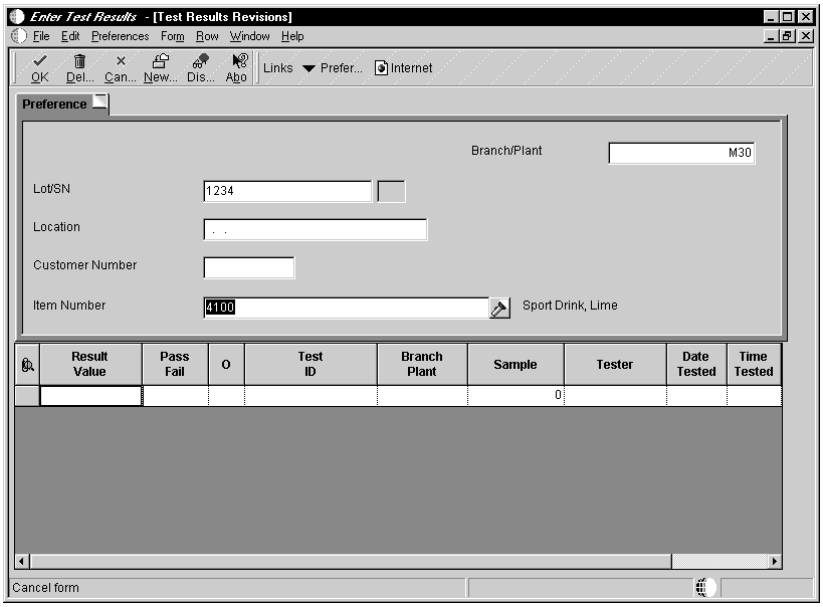
To select tests in preference format

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

On Work With Test Results

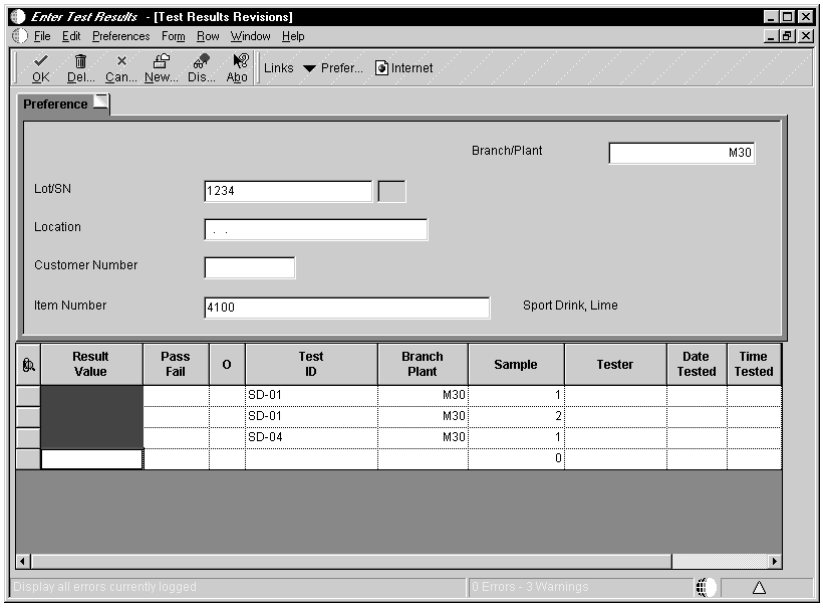


1. Click Add.



2. On Test Results Revisions, complete the following fields:
   - Branch/Plant
   - Lot/SN
   - Item Number

     If you set Allow Duplicate Lots to 2 in System Constants, the Item Number field is required. See *Setting Up Constants* in *Inventory Management.*
3. Complete the following optional fields:
   - Location
   - Customer Number
4. Choose Preference from the Form menu.



5. On the Preference tab of Test Results Revisions, enter the results for each test. See *Entering Test Results*.

Field	Explanation
Branch/Plant	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. NOTE: The system uses the job number for journal entries if you do not enter a value in the AAI table.
Lot/SN	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.
Item Number	A number that the system assigns to an item. It can be in short, long, or third item number format.
Location	The storage location from which goods will be moved.
Customer Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other address book members.

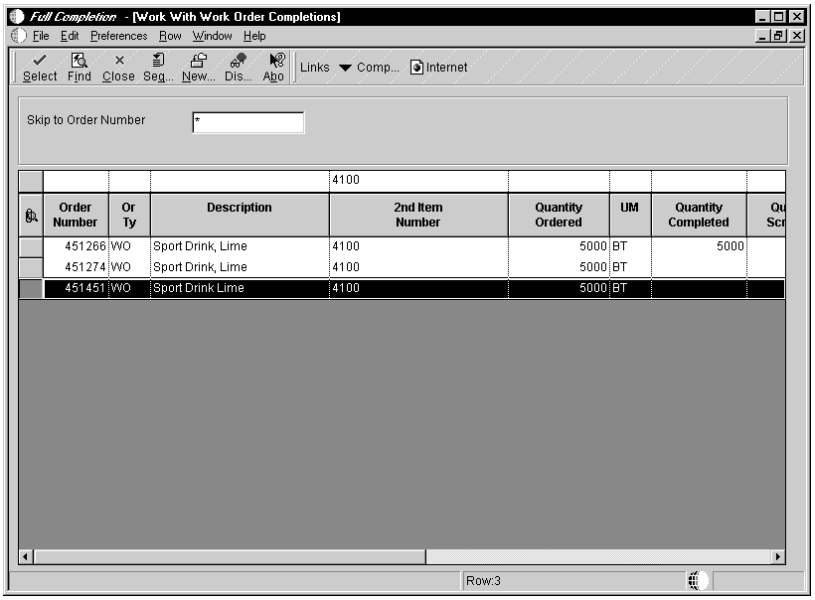
▶ To select tests in order number format

From the Daily Order Reporting – Discrete menu (G3112), choose Full Completion.

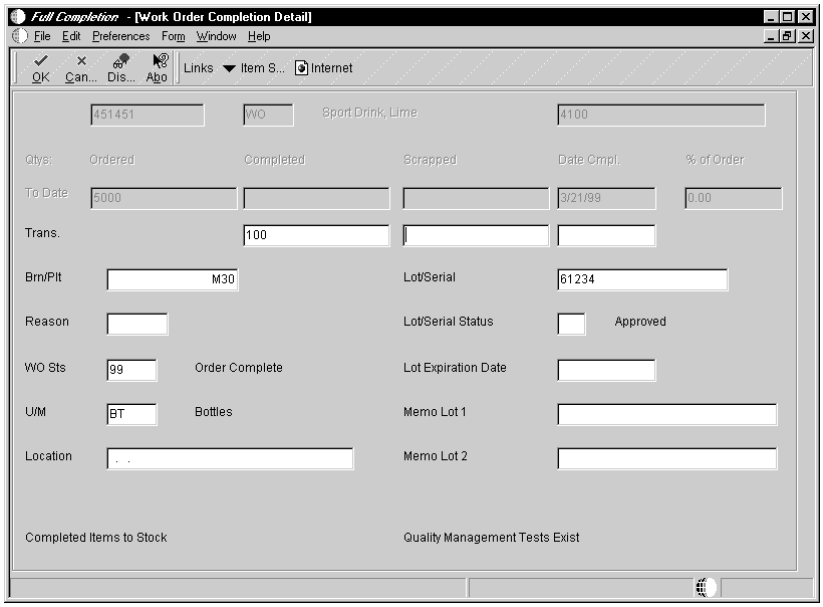
When you add test results for the first time in order number format, you cannot use the menu. You must access Test Results Revisions from an order processing program, such as a Shop Floor Management program for processing work orders. This enables the system to select the appropriate tests from preference profiles.

For example purposes, this procedure uses a work order completion in Shop Floor Management.

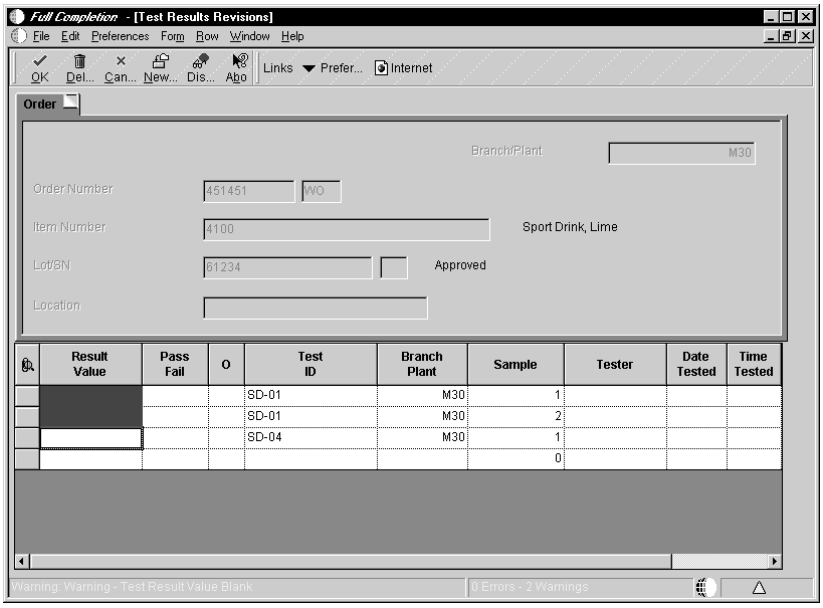
On Work With Work Order Completions



1. Enter the item number in the following field, and click Find:
   - 2nd Item Number
2. Choose the work order for which you want to enter results, and choose Completion from the Row menu.



3. On Work Order Completion Detail, complete the following fields:
   - Trans
   - Lot/Serial
4. Choose Test Results form the Form menu.



5. On the Order tab of Test Results Revisions, enter the results for each test. See *Entering Test Results*.

Field	Explanation
2nd Item Number	The system provides three separate item numbers plus an extensive cross-reference capability to alternate item numbers. These item numbers are: 1. Item Number (short) – An 8-digit, computer-assigned item number. 2. 2nd Item Number – The 25-digit, free–form, user defined, alphanumeric item number. 3. 3rd Item Number – Another 25-digit, free–form, user defined, alphanumeric item number. In addition to these three basic item numbers, an extensive cross-reference search capability has been provided (see XRT). Numerous cross-references to alternate part numbers can be user defined (for example, substitute item numbers, replacements, bar codes, customer numbers, or supplier numbers).

Field	Explanation
Trans	The number of units committed for shipment in Sales Order Entry, using either the entered or the primary unit of measure defined for this item. In the Manufacturing system and Work Order Time Entry, this field can indicate completed or scrapped quantities. The quantity type is determined by the type code entered.
Lot/Serial	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.

Entering Test Results

Entering test results is a two-part process. First, you select the appropriate tests (described in *Selecting Tests for Results Entry*). Then you enter the results for these tests (this procedure).

As you enter test results, the system processes them to determine if the results that you collected pass the tests that you defined. The system compares the test results against minimum and maximum values, and sets the value in the Pass/Fail field accordingly for each test, based on the Display/Evaluate Test value that you defined for the test.

The system evaluates each individual sample, then it evaluates the status of the entire set of tests in order to determine lot status. As the system evaluates the lot, it reads a test and then retrieves the Display/Evaluate Test value to determine how to evaluate that test.

The following are Display/Evaluate Test values:

1 – All samples

All samples must pass, unless you have defined an Accept Quantity or Accept Percentage that is less than the total number of samples. If the Accept Quantity and Accept Percentage fields are blank, the system assumes all samples of the test must pass in order for the test to pass.

You can only use the optional Accept Quantity and Accept Percentage fields if Display/Evaluate equals All.

2 – Average of all samples

The system adds all sample results for the test and determines an average. The average value must be within the minimum and maximum values defined for the test. Otherwise, the entire test fails.

3 – Last occurrence

The system retrieves the last sample that you entered for the test and determines if that sample passed. If so, the entire test passes.

The evaluation process uses the Acceptable Quantity on Test Definitions as the number of samples that must pass within a test. For example, you have 4 samples of the color test and you set Acceptable Quantity to 2. In this case, only 2 color samples must pass, in order for color to pass quality inspection for a test.

The evaluation process uses Acceptable Percentage on Test Definitions as the percentage of samples that must pass within a test. For example, you have 10 samples of the color test, and you set Acceptable Percentage to 50%. In this case, only 5 color samples must pass, in order for color to pass quality inspection for a test.

If all the tests within a lot have a passing value, the system sets the lot status to the value that you defined in the processing option for a passed status.

If any test within a lot fails (based on all samples, average, or last occurrence), the system sets the lot status to the value that you defined in the processing option for a failed status. All failed test results appear highlighted on screens that show test results, including Test Results Revisions and all inquiry screens.

You can override the Pass/Fail value to force the lot to pass. You should secure this function so that all users can review the status, but only users with proper authority can change the status. See *Overriding Test Status*.

Related Tasks

Evaluating tests during Bulk Load Confirm	The test type on Test Definitions determines whether you enter test results during Bulk Load Confirm. If a test is required, the Bulk Confirm process stops until you enter test results and they pass. If a test is optional, a warning message appears, but you can complete the Bulk Confirm process. If a test is guaranteed, you can complete the Bulk Confirm process and no warning message appears.
Creating non-conforming records	When you enter test results, you can also write failed tests to the Nonconforming Product table (F3703). Use the Nonconforming Product program to view these records.

▶ To enter test results

See *Selecting Tests for Results Entry* for the first part of this two-part process.

On Test Results Revisions

1. After you have entered test header information in the appropriate format, complete the following field with test result information:
   - Result Value
2. If you did not set the processing option for system-assigned sample numbers, enter a sample number for the test result in the following field:
   - Sample
3. Complete the following optional fields:
   - Tester
   - Date Tested
   - Time Tested

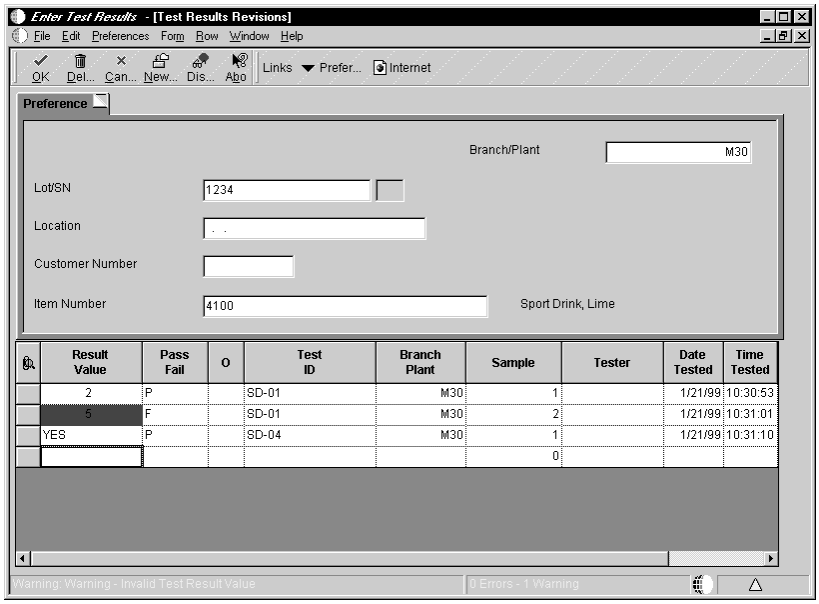
   You can override the date and time defaults.
4. Repeat steps 1 through 3 for each test result.

   The Result Value field appears highlighted until you enter a result, or if the test failed. You are not required to enter all results at the same time. However, until you enter test results for all samples of a required test, testing is incomplete and the lot will fail.

   If you need to enter new tests, you can do so at any time on the blank lines.
5. After you have entered all test results, click OK.

   If there are warning messages due to failed or empty test results, click OK repeatedly until all messages are cleared.

   The system evaluates each individual test and assigns a pass or fail code. The system then updates the lot status as passing or failing, based on the processing options.



6. Verify the test results for the lot that you just entered.

   If you need to revise any test results, choose the appropriate row and click Select.

Field	Explanation
Result Value	The result of the performed test.
Sample	A number assigned to a group of tests within the same sample.
Tester	The address book number of the person who originated the change request.
Date Tested	The date on which the test was performed.
Time Tested	The time at which the test was performed.
Pass Fail	The value which identifies whether the test passed (P) or failed (F).
Lot Status	A user defined code (table 41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold. You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.

Entering Text for Test Results

After you enter test results, you can enter informative text for those test results, such as a description of the measuring equipment that you used. If you turn on the Print Text option in your test definition setup, this text prints on the Certificate of Analysis.

The system automatically copies text from tests to preferences. In addition, you can choose a processing option to copy text from tests or preferences to test results.

This task uses the Preference format as an example.

See Also

- *Setting Up Tests*

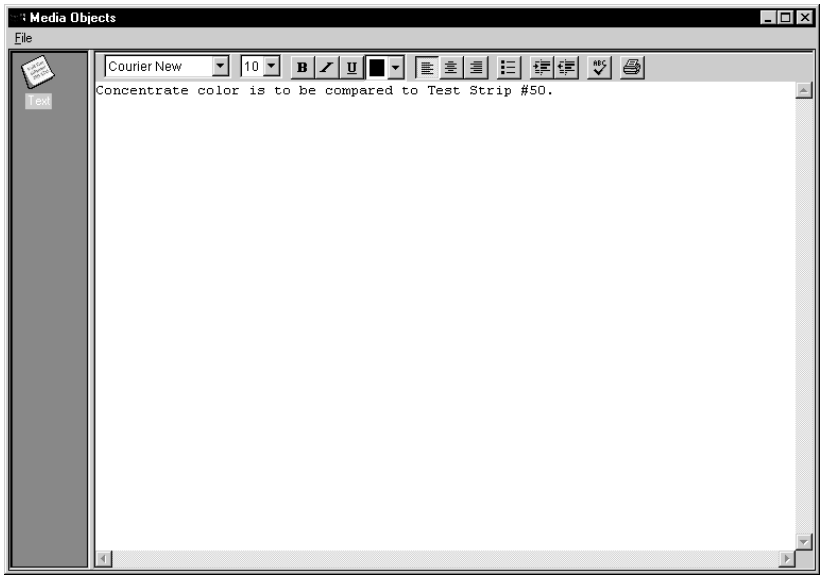
▶ To enter text for test results

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

On Work With Test Results

1. To locate an item for which you have entered test results, complete any of the following fields and click Find:
   - Branch/Plant
   - Order Number
   - Or Ty
   - Item Number
   - Customer Number
   - Lot/SN
   - Location
2. Choose the appropriate test and click Select.
3. On Test Results Revisions, choose the record for which you want to enter informative text and choose Attachments from the Row menu.

4. On Media Objects, choose Add, then Text, from the File menu.



5. Type the information and then choose Save & Exit from the File menu.

   A paper clip icon appears in the appropriate row on Test Results Revisions. This indicates that there is an attachment to the test result.

Overriding Test Status

After you enter test results, you can override the pass or fail value of each individual test, if necessary. For example, you might need to override a failing value to force the lot to pass.

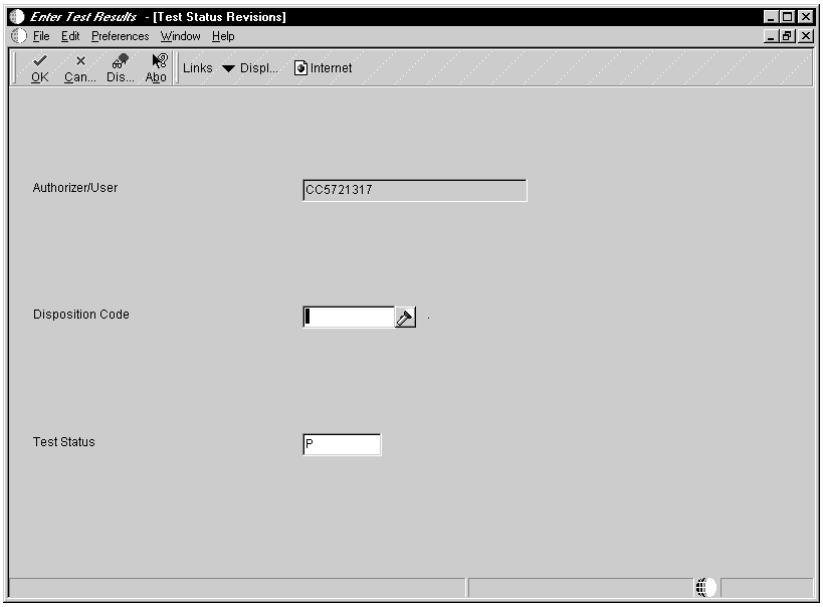
You should secure this function so that all users can review the status, but only users with proper authority can change the status.

▶ To override test status

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

On Work With Test Results

1. To locate an item for which you have entered test results, complete any of the following fields and click Find:
   - Branch/Plant
   - Order Number
   - Or Ty
   - Item Number
   - Customer Number
   - Lot/SN
   - Location
2. Choose the appropriate set of tests and click Select.
3. On Test Results Revisions, choose the record for which you want to override the test status, and choose Override Status from the Row menu.



4. On Test Status Revisions, complete the following fields and click OK:
   - Disposition Code
   - Test Status
5. On Test Results Revisions, choose Attachments from the Row menu.
6. On Media Objects, type a memo describing why you changed the status of the test, and then choose Save & Exit from the File menu.

   The system updates the Override code on Test Results Revisions.

Field	Explanation
Disposition Code	A user defined code (system 37/type DS) that explains the purpose of the test status change. For example, you can indicate the reason you are passing the failed test, such as the item will go through re-work or will be scrapped.
Test Status	The value which identifies whether the test passed (P) or failed (F).
O	The flag which designates whether a test has been overridden. Valid values are: 1 overridden 0 not overridden

Creating New Samples

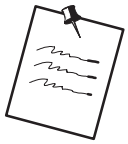
You can enter test results for a different number of samples than you originally set up. The procedures differ, depending on whether you are entering test results for the first time or you are entering results after re-testing.

Creating new samples consists of the following tasks:

- Overriding the number of samples for first-time tests
- Creating additional samples for re-testing

Overriding the Number of Samples for First-Time Tests

You can override the number of samples defined for each test in Preference Profiles and Test Revisions. To do so, you must set the processing option to display the Number of Samples field.



You can only use this feature when you are entering test results for the first time for a specific item or lot. If you are entering additional test results, use the New Sample option. See *Creating additional samples for re-testing*.

Before You Begin

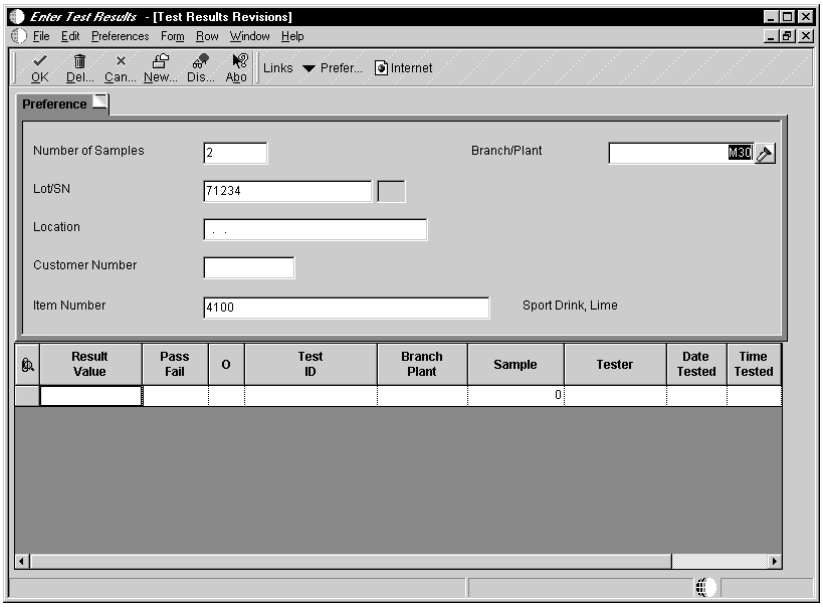
❑ Set the processing option to display the Number of Samples field.

▶ To override the number of samples for first-time tests

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

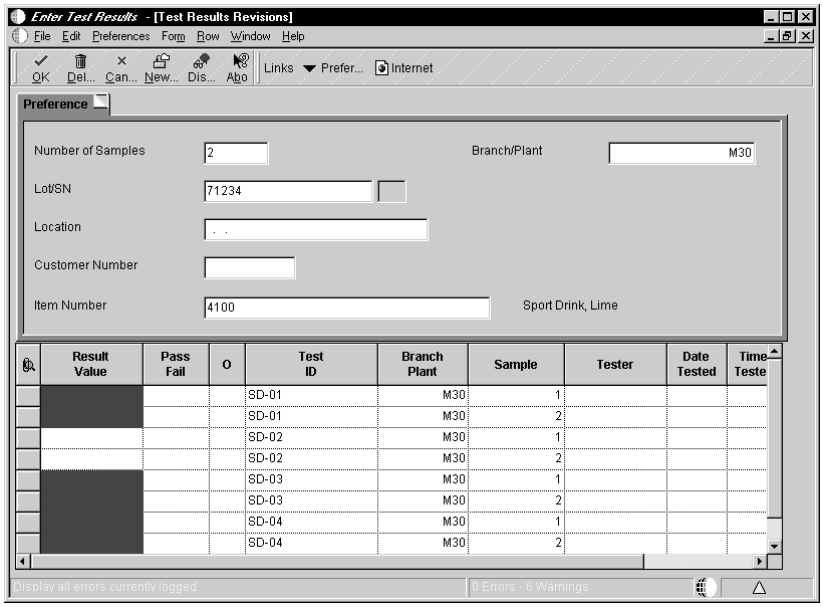
On Work With Test Results

1. Click Add.



2. On Test Results Revisions, complete the following fields:
   - Branch/Plant
   - Lot/SN
   - Item Number
3. Enter the number of samples that you need in the following field:
   - Number of Samples
4. Complete the following optional fields:
   - Location
   - Customer Number
5. Choose Preference from the Form menu.

   The system creates samples for each test based on the number of samples that you entered.



6. If there are samples that you do not need, choose those samples and click Delete.

Field	Explanation
Number of Samples	The number of samples to be taken for the test.

Creating additional samples for re-testing

After you perform a quality test on an item's sample and record the results, you can create additional samples for re-testing purposes without having to create a new lot.

The New Sample option creates one new sample for each test within the Preference.

▶ To create additional samples for re-testing

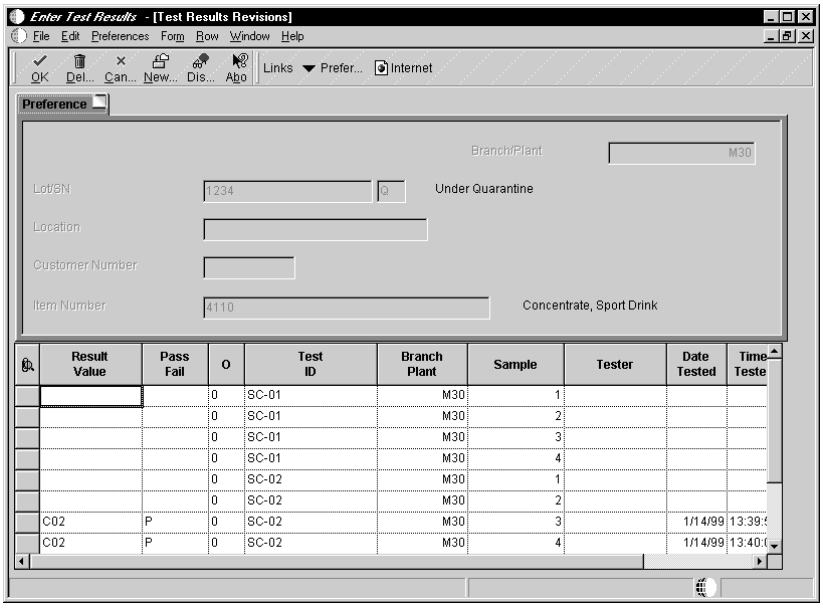
From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

On Work With Test Results

1. To locate an item for which you have entered test results, complete any of the following fields and click Find:
   - Branch/Plant
   - Order Number
   - Or Ty

- Item Number
- Customer Number
- Lot/SN
- Location

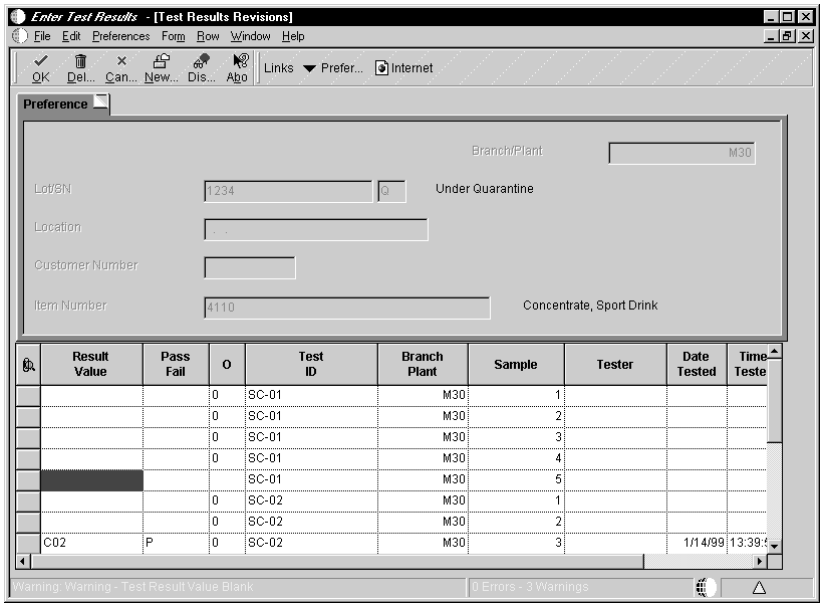
2. Choose the appropriate set of test results and click Select.



3. On Test Results Revisions, choose New Sample from the Form menu.

   The system creates one new sample for *each* test.

   You can also use the Copy Test option on the Row menu to create one new sample for *one* test.



4. If you need additional new samples, repeat steps 2 and 3.
5. If you do not need to enter test results for a particular new sample, choose that sample and click Delete.

Processing Options: Enter Test Results (Test Results Revisions)

Test Results Tab

These processing options control how you format, display, and record test results.

1. Results Entry Format

Use this processing option to choose the format for entering test results. Valid values are:

1 Preference format, which organizes test results by branch/plant and customer number or item number.
2 Order number format, which organizes test results by work order, sales order, or purchase order numbers.
3 Compartment format, which organizes test results by load number and planning depot.
Blank Preference format.

2. Default Tester

Enter the default address book number for the tester.

If this processing option is blank (no default), you must enter the tester's address book number manually for each test.

3. Minimum and Maximum Parameters

This processing option controls the range of acceptable values to measure quality. Valid values are:

1 Use preferred minimum and maximum parameters. These are the lowest and highest values for a preferred test result. Preferred values must be within the range of minimum and maximum allowed values. Use preferred values to measure quality to a more precise specification than is requested by a customer.

Blank Use allowed minimum and maximum parameters. These are the lowest and highest values for a passing test result.

4. Number of Samples

This processing option controls the number of samples to take for quality testing. Valid values are:

1 Display the Number of Samples field for input. Choose this option if you want to override the number of samples set up in Preference Profiles or in the Test Definition Master.

Blank Do not display the Number of Samples field. If this processing option is blank, the system uses the number of samples set up in Preference Profiles or in the Test Definition Master. The Number of Samples field does not appear on Test Results Revisions (P3711).

5. Copy Generic Text

Use this processing option to copy information or instructions from tests or preferences to test results. Valid values are:

1 Copy generic text from Test Revisions (P3701). When you set up tests, you can use generic text to add information or instructions related to a specific test, such as sampling methods to be used. This option allows you see the instructions on your test results.

2 Copy generic text from Preference Profiles (P40300). When you set up preferences, you can use generic text to add information or instructions related to a specific test within a preference, such as sampling methods to be used for customized tests for an item. This option allows you to see the instructions on your test results.

Blank Do not copy generic text.

6. Test Results Search

This processing option controls how the system searches for test results, whether you are using the Quality Management menu or accessing the Quality Management application from other applications. Valid values are:

1 Search for existing test results by lot number. To prevent duplicate testing, you can set this processing option to search for test results by lot number first rather than by the document number. If no results are found, you can create new test results for the lot number and document number.

Blank Use preference profiles to create new test records. If this processing option is blank, the system uses the preference profiles you set up to create a new set of tests for an existing document number.

7. Record Nonconforming Product

Use this processing option to record items that have not passed quality testing. Valid values are:

1 Write failed tests to the Nonconforming Product file. In order to record failed tests, this option must be set to 1. When a single test fails, the system assigns a defect number and records the failure to the Nonconforming Product file. You can then review all failed lots and assign corrective actions.

Blank Do not record failed tests.

8. Activate System Sample Numbering

Use this processing option to enable the system to assign sample numbers to test results. Valid values are:

1 The system assigns sample numbers.

Blank The system does not assign sample numbers.

If this processing option is blank, you must enter a sample number for each test result.

Security Tab

These processing options allow you to secure certain test information so that it cannot be changed.

1. Protect Date and Time

Use this processing option to protect the date and time of tests. Valid values are:

1 Protect date and time of test.

Blank Do not protect date and time of test.

2. Protect Tester's ID

Use this processing option to protect the address book number of the tester. Valid values are:

1 Protect tester's address book number.
Blank Do not protect tester's address book number.

Lot Status Tab

These processing options control lot availability and lot status update.

1. Status for a Failed Lot

Enter the status code for a failed lot, such as F.

If this processing option is blank, lots that have failed quality testing can be sold or shipped.

2. Status for a Passing Lot

Enter the status code for a passing lot, such as P. Only enter a code other than a blank if you want to hold passing lots, so that they are not available to be sold or shipped. You might use this option if you need additional approvals before selling or shipping lots that have passed quality testing.

If this processing option is blank, lots that have passed quality testing can be sold or shipped.

3. Lot Status Update

Use this processing option to control how you update the status of lots. Valid values are:

1 Update the status for all lot locations. This option allows you to update the status of a lot throughout your inventory, in all locations.
2 Display the Location Lot Status Change window to update status. This option allows you to update specific lot locations rather than all lot locations.
Blank Only update status on the lot master. If you need additional testing or approvals before updating lot status records in your inventory, leave this processing option blank.

Versions Tab

These processing options allow you to enter versions for Test Results programs. Versions control how programs display information. If a processing option is blank, the program uses the ZJDE0001 version.

1. Certificate of Analysis (R37900)

If your customers require additional reporting, you can print a Certificate of Analysis, which lists all of the tests performed and their results for lots sold to a customer.

Enter the version of the Certificate of Analysis to print. If this processing option is blank, the program uses the ZJDE0001 version.

2. Product Test Report (R37901)

This report is intended for internal use, to review all test results for the work order, purchase order, or lot number you select.

Enter the version of the Product Test Report to print. If this processing option is blank, the program uses the ZJDE0001 version.

3. Trace Test Results (P37201)

This form allows you to find test results for an assembled item and for the components of the assembled item, or for an item that has been re-classified.

Enter the version of Trace Test Results to review. If this processing option is blank, the program uses the ZJDE0001 version.

Working with External Test Results

From the Quality Management Daily Operations menu (G37), choose Batch Test Results.

You can load external test results from a LIM (Laboratory Information Management) system into the Quality Management system. After you have loaded external test results to a work file, use the Batch Test Results program to edit the test results against existing test definitions, branch/plants and results that have passed or failed. This program reads the work file, edits the results, and writes records to the Test Results table (F3711).

The Batch Test Results program also prints a report that includes all of the records in the Test Results table, or an exception report that includes any errors that the system encountered.

Reviewing Test Results

The test results contain important information that can help you closely monitor product quality. You can review test results to help you do the following:

- Make timely decisions about product quality to reduce the high costs of rework and scrap
- Reduce labor costs by minimizing the time spent inspecting material, collecting data, and reworking or repairing defective material
- Reduce service trips and material scrap costs by identifying inferior components before shipment
- Improve overall product quality and customer satisfaction

Reviewing test results consists of the following tasks:

- ❑ Reviewing test results by lot number
- ❑ Locating test results by item number and test ID
- ❑ Tracing test results
- ❑ Managing failed lots
- ❑ Reviewing tested lots by preference profile

See Also

- *Printing Test Results Reports* for descriptions of the Product Test Report and the Test Results Worksheet
- *Additional Order Processing During Ship Confirm* in the *Sales Order Management Guide*, for information on searching for tested lots for sales orders

Reviewing Test Results by Lot Number

As you work with lots in your Inventory Management and Sales Order Management systems, you can locate test results by lot number to determine which lots have passed or failed quality testing.

The manner in which the Test Results Inquiry program displays information depends on how you access it, as follows:

- When you access Test Results Inquiry from Lot Availability or Lot Master, you see test results exactly as they were input.
- When you access Test Results Inquiry from Sales Order Entry using Item Search, the system performs an online evaluation for the selected lot. The system uses the customer number from Sales Order Entry to select tests using preference profiles. The system then uses those tests to re-evaluate the lot. Although the lot might pass inspection according to manufacturing specifications, it might fail inspection according to customer specifications.

  If the customer number is blank, the system uses the item number from Sales Order Entry to select tests.

When you enter a sales order, you can do the following:

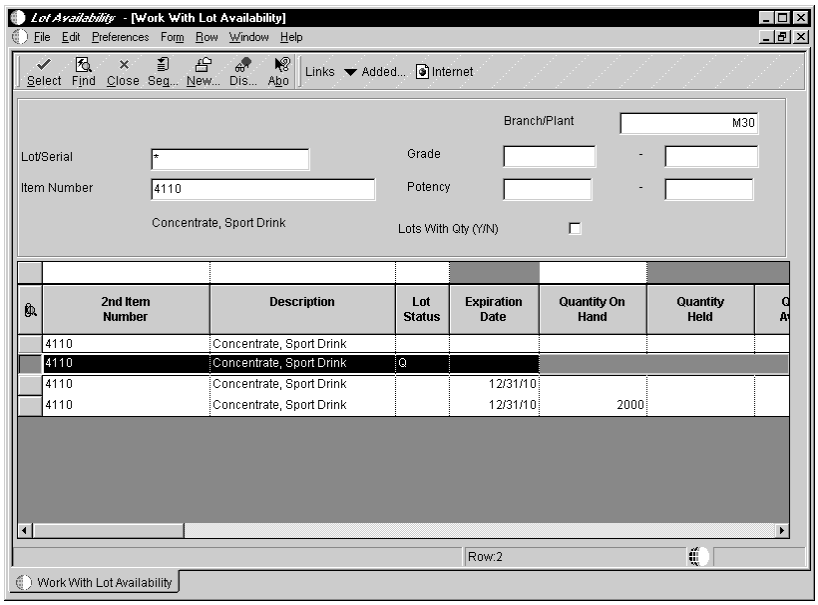
- Use Test ID and test ranges to filter for items that meet your customer's requirements on Selection Criteria
- Locate items based on the Allowed Minimum or Allowed Maximum fields
- Determine if the lots that you review on Item Search meet the customer or manufacturing specifications
- Add lots to the sales order that meet your customer's requirements
- Access Test Results Inquiry from Item Search to view test results for an item, lot, and customer so that you can determine whether the lot meets customer specifications

▶ To review test results by lot number

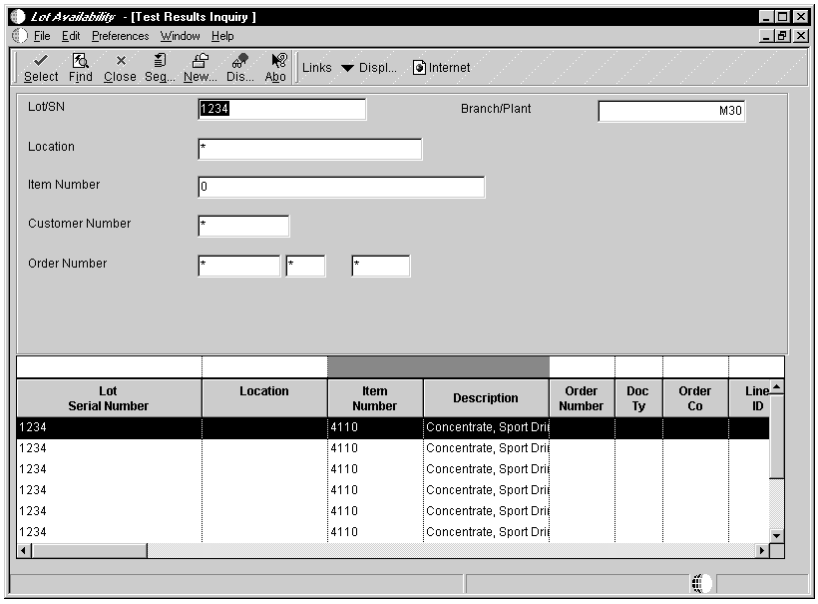
From the Lot Control menu (G4113) in Inventory Management, choose Lot Availability.

Alternatively, you can choose Lot Master Revisions.

On Work With Lot Availability



1. To locate an item for which you have entered test results, complete any of the following fields and click Find:
   - Branch/Plant
   - Lot/Serial
   - Item Number
2. To determine if a lot has passed quality inspection, review the following field:
   - Lot Status
3. Choose a test and choose Test Results from the Row menu.



4. On Test Results Inquiry, review the following field to determine if a test was overridden:
   - Test Ovrr

Field	Explanation
Lot Status	A user defined code (41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold. You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.
Test Ovrr	The flag which designates whether a test has been overridden. Valid values are: 1 overridden 0 not overridden

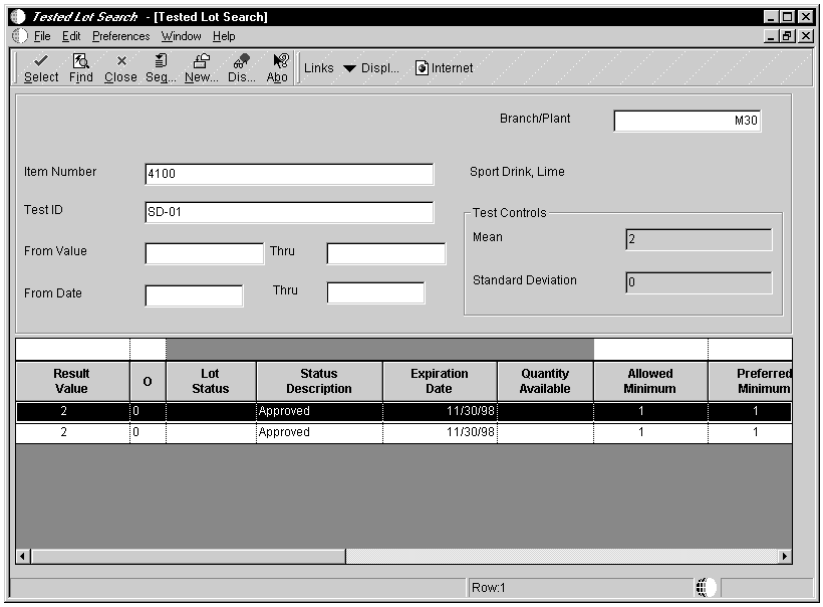
Locating Test Results by Item Number and Test ID

You can use the Tested Lot Search program to find the items in inventory that meet specific test ranges.

▶ To locate test results by item number and test ID

From the Quality Management Daily Operations menu (G37), choose Tested Lot Search.

On Tested Lot Search



1. To locate a specific item and lot, complete the following fields and click Find:
   - Branch/Plant
   - Item Number
   - Test ID
   - From Value
   - Thru

   If you leave the From Value and Thru fields blank, the system displays all test results.

2. Review the following fields:
   - Result Value
   - O
   - Lot Status
   - Expiration Date
   - Quantity Available

Field	Explanation
Result Value	The result of the performed test.
O	The flag which designates whether a test has been overridden. Valid values are: 1 overridden 0 not overridden

Field	Explanation
Lot Status	A user defined code (table 41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold. You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.
Expiration Date	The date on which a lot of items expires. The system automatically enters this date if you have specified the shelf life days for the item on Item Master Information or Item Branch/Plant Information. The system calculates the expiration date by adding the number of shelf life days to the date that you receive the item. You can commit inventory based on the lot expiration date for items. You choose how the system commits inventory for an item on Item Master Information or Item Branch/Plant Information.
Quantity Available	The quantity available can be the on-hand balance minus commitments, reservations, and backorders. Availability is user defined and can be set up in branch/plant constants.

Tracing Test Results

Use the Trace Test Results program to find test results for components of an assembled item or for an item that has been re-classified.

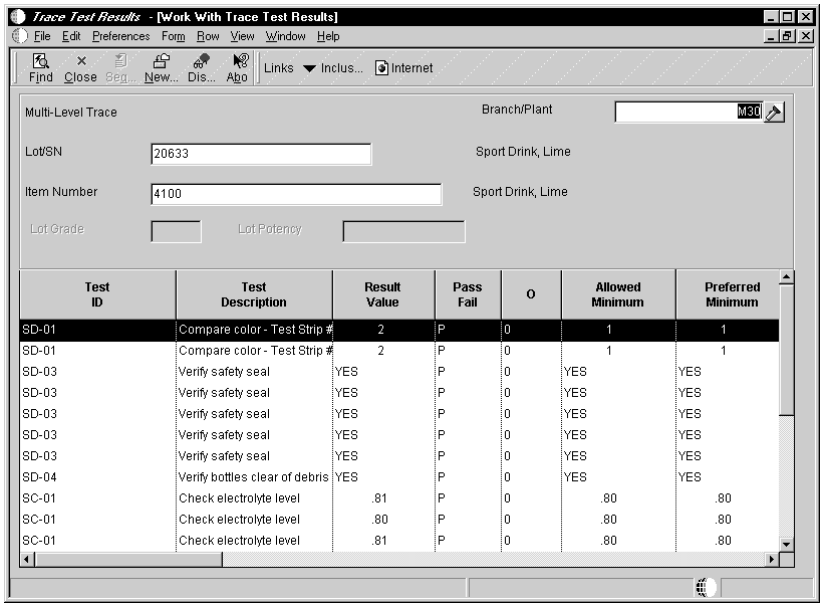
See Also

- *Setting Up Inclusion Rules for Test Results Tracing*

▶ To trace test results

From the Quality Management Daily Operations menu (G37), choose Trace Test Results.

On Work With Trace Test Results



1. To review lots associated at lower levels, choose Multi Level from the View menu.
2. To locate a specific item and lot, complete the following fields and click Find:
   - Branch/Plant
   - Lot/SN
   - Item Number
3. Review the following fields:
   - Test ID
   - Description
   - Result Value
   - Pass Fail
   - Date Tested
   - Time Tested

Managing Failed Lots

For items that have not passed test evaluation on Test Results Revisions, use the Nonconforming Product program to review all failed lots and assign a corrective action.

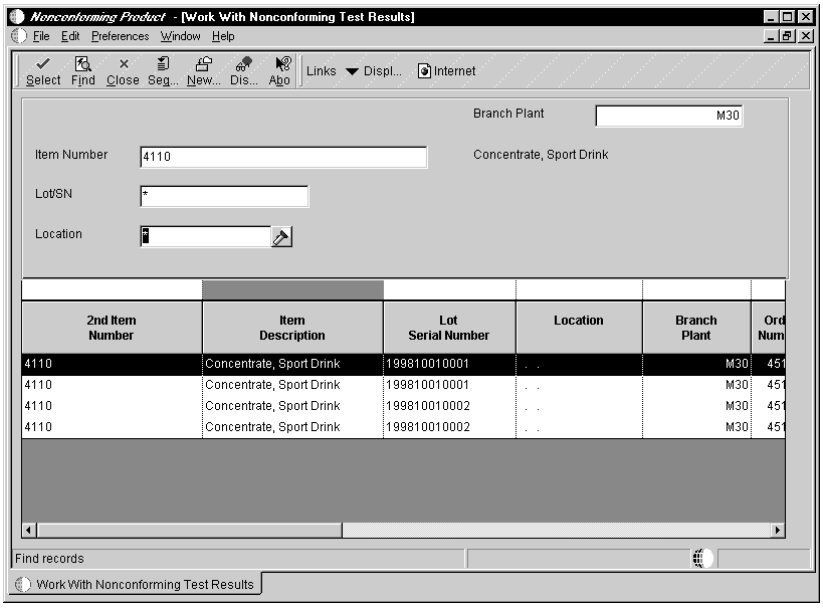
Before You Begin

❑ Set the processing option for Enter Test Results to write failed tests to the Non-Conforming Material table (F3703).

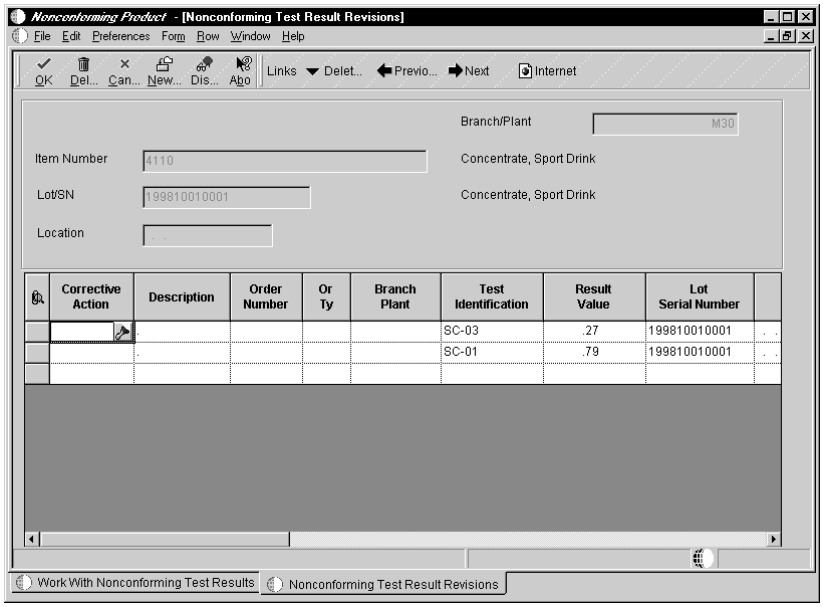
▶ To manage failed lots

From the Quality Management Daily Operations menu (G37), choose Nonconforming Product.

On Work With Nonconforming Test Results



1. To locate a specific item and lot, complete the following fields and click Find:
   - Branch Plant
   - Item Number
   - Lot/SN
   - Location
2. Choose a record and click Select.



3. On Nonconforming Test Result Revisions, review the value ranges for test results and the following fields:
   - Description
   - Result Value
   - Date Tested
   - Time Tested
   - Target Value
4. To enter rework orders for a failed lot, complete the following fields:
   - Corrective Action
   - Order Number

   These fields do not generate rework orders. Rather, you use them to document any corrective action to be taken and to reference the associated work order.

Field	Explanation
Corrective Action	A user defined code (system 37/type RC) that explains the action to be taken following the failed test. For example, a code could be used to indicate the material that failed testing should be reworked and brought to conforming standards.
Order Number	The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.

Reviewing Tested Lots by Preference Profile

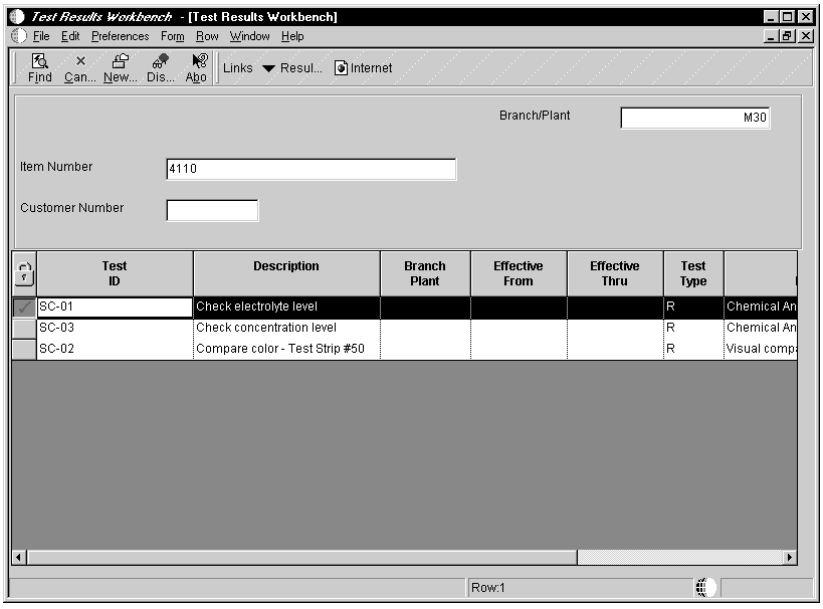
With Test Results Workbench, you can review test results for all lots tested against a particular preference profile. For example, if customers complain about the taste of a beverage, a customer service department might use Test Results Workbench to look at beverage lot numbers and the tests that had been run against them.

To review test results, you first enter the preference information in the header area. The system then selects a test or group of tests according to this preference profile and locates all corresponding lots that have test results.

▶ To review tested lots by preference profile

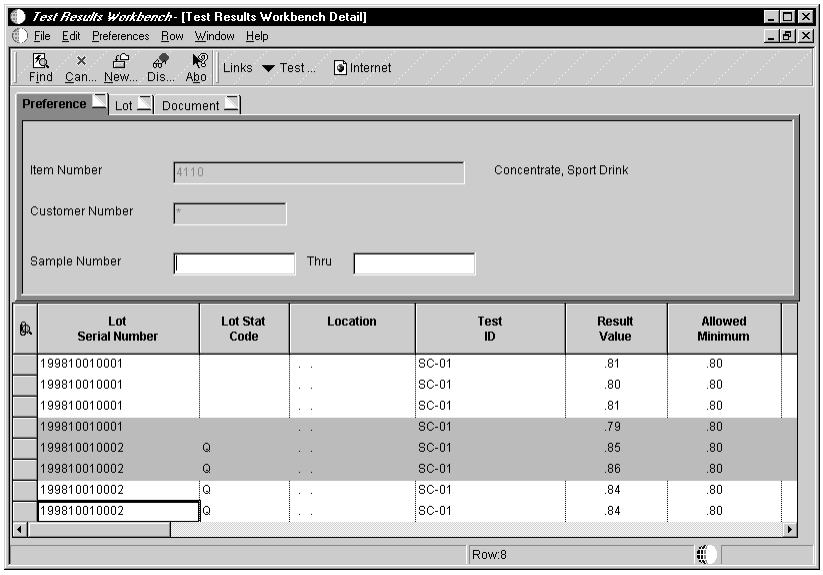
From the Quality Management Daily Operations menu (G37), choose Test Results Workbench.

On Test Results Workbench



1. Complete the following fields:
   - Branch/Plant
   - Item Number
2. Complete the following optional field and click Find:
   - Customer Number
3. To choose a row or rows, double-click each record until a check mark appears to the left of the row.

4. Choose Result Detail from the Form menu.



5. On Test Results Workbench Detail, review the test results. If you need to enter more information to narrow your search, you can use the fields on the Preference, Lot, and Document tabs.

Reports

Quality Management Reports

The Quality Management system provides a variety of reports that contain information about how you have defined tests, specifications, and preferences, as well as the results of quality testing.

Quality Management Reports consists of the following tasks:

- ❑ Printing setup reports
- ❑ Printing test results reports

Printing Setup Reports

Use setup reports to review information about how you have defined tests, specifications, and preferences. Note that the name of the preference report is Item Test/Specification report.

Printing setup reports consists of the following tasks:

- ❑ Printing the Test Definitions report
- ❑ Printing the Specifications report
- ❑ Printing the Item Test/Specification (Preferences) report

Printing the Test Definitions Report

From the Quality Management Setup menu (G3741), choose Test Definitions Report (R37410).

The Test Definitions Report includes all of the tests for a branch/plant that you select. Use this information to review and maintain quality tests for all of your products.

See Also

- *R37410, Test Definitions Report* in the *Reports Guide* for a report sample

Processing Options for Test Definition Report

```
Workflow

      Enter the test status for                          _____
      selecting test definitions.    1 =
      Pending  2 = History  3 = Rejected
      blank = Active/Approved
      Enter the as of date for selecting                 _____
      test definitions.
```

Printing the Specifications Report

From the Quality Management Setup menu (G3741), choose Specifications Report (R37415).

The Specifications Report includes all of the test specifications for a branch/plant that you select. Use this information to review and maintain quality specifications within your business.

See Also

- *R37415, Specifications Report* in the *Reports Guide* for a report sample

Processing Options for Specification Report

Workflow

Enter the specification status for selecting specification definitions. 1 = Pending 2 = History 3 = Rejected blank = Active/Approved _____

Enter the as of date for selecting specification definitions. _____

Printing the Item Test/Specification (Preferences) Report

From the Quality Management Setup menu (G3741), choose Item Test Specifications (R37420).

The Item Test Specifications report includes all test specifications by customer, customer group, item, or item group for the branch/plant that you select. Use this information to maintain and review preference profiles within your business.

See Also

- *R37420, Item Test/Specification Report* in the *Reports Guide* for a report sample

Processing Options for Item Test/Specification

Print

Enter ’1’ to print all the tests included in a particular specification. If left blank only the specification will print on the report. _____

Workflow

Enter the test/specification status for selecting test/specification definitions. 1 = Pending 2 = History 3 = Rejected blank = Active/Approved _____

Enter the as of date for selecting test/specification definitions. _____

Printing Test Results Reports

Use test results reports to print Certificates of Analysis, to review the results of quality testing, and to print worksheets.

Printing test results reports consists of the following tasks:

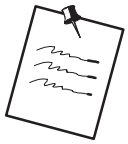
- ❑ Printing the Certificate of Analysis
- ❑ Printing the Product Test report
- ❑ Printing the Test Results Worksheet

Printing the Certificate of Analysis

From the Quality Management Daily Operations menu (G37), choose Certificate of Analysis (R37900).

You can print a Certificate of Analysis when a customer requires additional reporting. The Certificate of Analysis lists all of the tests performed and the test results for lots sold to a customer.

Based on data that you select, the system searches for test results for the related sales order information. If you set the processing option for trace processing, the system searches for multi-level test results for each lot located. The system then prints all test results for each lot.



You can set processing options in the Ship Confirm program to print certificates of analysis automatically.

See Also

- *R37460, Certificate of Analysis* in the *Reports Guide* for a report sample

Before You Begin

- ❑ Determine which tests and generic text to print on the Certificate of Analysis. See *Defining Tests.*
- ❑ Determine which customers should receive a Certificate of Analysis. See *Setting Up Customer Billing Instructions.*

❑ Determine the type of transaction records to use for tracing lots. See *Setting Up Inclusion Rules for Test Results Tracing.*

Processing Options: Certificate of Analysis Extract

Defaults Tab

For information about a processing option, right-click the processing option field and choose What's This? from the menu. Or, click the processing option field and press F1.

These processing options control the address that appears on the Certificate of Analysis and overriding the Next Status code on sales orders. To override the Next Status code, the system uses values that you have set up in a user defined code table. For more information, see *Working With Shipments* in the *Sales Order Management Guide.*

1. Address Type

Use this processing option to print the appropriate address on the Certificate of Analysis. Valid values are:

1 Ship to address.
2 Sold to address.
3 Parent address.
Blank Ship to address.

2. Next Status

If you need to indicate on a sales order that you printed a Certificate of Analysis, use this processing option to override the Next Status code.

Enter a value from your user defined table to override the Next Status code.

If this processing option is blank (the default), the Next Status code is not overridden.

Extract Tab

For information about a processing option, right-click the processing option field and choose What's This? from the menu. Or, click the processing option field and press F1.

This processing option controls whether you can reprint Certificates of Analysis without rerunning them.

1. Extract Table

Use this processing option to save history information in the Certificate of Analysis extract table, so that you can reprint certificates without needing to rerun them. For example, you might need to reprint a Certificate of Analysis that was lost in the mail for a customer who requires the certificate in order to accept product. Valid values are:

1 Do not clear the Certificate of Analysis extract table (save history information), to allow reprints.
Blank Clear the Certificate of Analysis extract table each time the report is run.

Trace Tab

For information about a processing option, right-click the processing option field and choose What's This? from the menu. Or, click the processing option field and press F1.

This processing option controls whether you trace test results.

1. Trace

This processing option controls whether you trace test results for lots. You can find test results for an assembled item, the components of the assembled item, or for an item that has been re-classified. Valid values are:

1 Trace multi-level test results by lot.
Blank Do not trace test results.

If you do not trace test results, you must enter test results for sales orders at Ship Confirm status in order to generate a Certificate of Analysis.

Preference Tab

For information about a processing option, right-click the processing option field and choose What's This? from the menu. Or, click the processing option field and press F1.

This processing option controls whether you use preference profiles to print test results on the Certificate of Analysis.

1. Preference Test Results

This processing option controls whether you use preference profiles to print test results on the Certificate of Analysis. Valid values are:

1 Use preference profiles to print test results on the Certificate of Analysis. The system re-evaluates test results for Pass/Fail codes based on the minimum and maximum values in preference profiles.

Blank Do not use preference profiles to print test results. The system prints tests results on the Certificate of Analysis without re-evaluating them for Pass/Fail codes.

Print Tab

For information about a processing option, right-click the processing option field and choose What's This? from the menu. Or, click the processing option field and press F1.

These processing options control the version of the Certificate of Analysis to print and the ability to reprint certificates without needing to rerun them. Versions control how programs display information.

1. Certificate of Analysis (R37460)

Use this processing option to print a Certificate of Analysis, which lists all of the tests performed and their results for lots sold to a customer.

Enter the version of the Certificate of Analysis to print. If this processing option is blank, the program uses the ZJDE0001 version.

2. User Defined Program

Use this processing option to print a Certificate of Analysis that you have designed, instead of using R37460.

Enter the name of your customized Certificate of Analysis. If this processing option is blank, the program uses R37460.

3. User Defined Version

Use this processing option to specify the version of your customized Certificate of Analysis to print. This processing option is required if you are using a customized certificate. Otherwise, leave this processing option blank.

Enter the version of your customized certificate to print.

Printing the Product Test Report

From the Quality Management Setup menu (G3741), choose Product Test Report (R37901).

Use the Product Test Report to review all test results for a work order, purchase order, or lot number that you select. Use this information to review quality information for your orders.

Although this report is intended for internal use, you can print Test Results in a Certificate of Analysis format without a sales order. For example, you might print Certificates of Analysis for inventory that will be placed in stock and sold later to unknown clients. In this case, you package the certificates with the items prior to placing them in stock and before you sell them.

Based on data that you select, the system searches for test results for the related order information. If you set the processing option for trace processing, the system searches for multi-level test results for each lot located. The system prints all test results for each lot.

See Also

- *R37450, Product Test Report* in the *Reports Guide* for a report sample

Processing Options for Product Test Report Extract

```
Extract

      1.  Enter '1' to avoid clearing                    _____________
      the Product Test Report extract
      table.

Trace

      1. Enter '1' to trace multi-level                  _____________
      test results.  If left blank, lot
      trace will not be performed.

Print

      1. Enter the version of the                        _____________
      Product  Test Report (R37450) to
      call.  If  left blank, 'ZJDE0001'
      will be used.
      2. Enter the name of the user                      _____________
      defined    Product Test Report.
      3. Enter the version of the user                   _____________
      defined Product Test Report
      program to call.
```

Printing the Test Results Worksheet

From the Discrete Order Preparation menu (G3111) in Shop Floor Management, choose Order Processing (R31410).

The Test Results Worksheet contains a set of tests for a manufactured item. You use a processing option to determine the set of included tests. For example, if your manufacturing work order has a related sales order, you can set a processing option to select a specific set of tests for the customer from a preference profile.

Quality assurance analysts or lab personnel can use this worksheet as follows:

- As an instruction sheet for tests to be run
- As a blank form for hand-written test results to be entered

See Also

- *Running Order Processing* in the *Shop Floor Management Guide* for additional information on order processing
- *R37470, Test Results Worksheet* in the *Reports Guide* for a report sample

Processing Options for Test Results Worksheet

```
Print

      1.  Enter '1' to print the                          _____________
      Preferred Minimum and Maximum.  If
      left blank the Allowed Minimum and
      Maximum will print.

Preference

      1.  Enter '1' to preference for                     _____________
      tests based on a related sales
      order.  If left blank,
      preferencing will be based only on
      the manufactured item.

Text

      1.  Choose from the following to                    _____________
      print Generic Text:  1 = Print
      Generic Text from Test Revisions
      (P3701).  2 = Print Generic Text
      from Preference Profiles (P40300).
      If left blank, text will not
      print.
```

Glossary

Glossary

actual demand. Actual customer orders and allocations of items/ingredients/raw materials to production or distribution.

aggregate leadtime. See cumulative leadtime.

aggregate planning. The sum of all forecasted demand (customer, distribution, manufacturing) for all items in a family for purposes of planning gross requirements.

alternate operation. Replacement for a normal operation or routing for an item in the manufacturing process.

alternate routing. A routing, less preferred than the primary routing, that results in an item identical to that produced by the primary routing.

application. A computer program or set of programs used to accomplish a task. In OneWorld, there are interactive applications and batch applications. Interactive applications are made up of a set of forms through which the user interacts with OneWorld. Interactive application identifiers begin with "P." For example, Address Book Revisions (P01012) is an interactive application. Batch applications run without user interaction. Reports and table conversions are examples of batch applications. Batch application identifiers begin with "R." For example, the Print Mailing Labels report (R01401) is a batch application.

assemble-to-order product. A product for which key components (bulk, semi-finished, intermediate, subassembly, fabricated, purchased, packaging, and so on) are planned and stocked in anticipation of a customer order. Contrast with make-to-order product.

assembly. A group of items or subassemblies that, when put together, constitute an end item.

assembly inclusion rule. A logic statement that specifies the conditions for using a part, adjusting the price or cost, performing a calculation, or using a routing operation for configured items.

associated service type. See linked service type.

audit trail. The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records and usually concludes with a report.

automatic accounting instruction (AAI). A code that refers to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries, including interfaces between the Accounts Payable, Accounts Receivable, Financial Reporting, and General Accounting systems. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the General Ledger Post program to post a debit to a specific expense account and a credit to a specific accounts payable account.

availability. For packaged product, the system checks availability. For bulk product, you can assume it is in stock and available for sale.

backflush. To deduct from inventory records the components or ingredients as a result of the production process. See also super backflush.

batch bill of material. A recipe or formula in which the quantity of each component is based on the standard batch quantity of the parent.

batch control. A feature that verifies the number of transactions and the total amount in each batch that you enter into the system.

batch input. A group of transactions loaded from an external source.

batch job. A task or group of tasks you submit for processing that the system treats as a single unit during processing, for example, printing reports and purging files. The system performs a batch job with little or no user interaction.

batch processing. A method by which the system selects jobs from the job queue, processes them, and sends output to the outqueue. Contrast with interactive processing.

batch quantity. See standard batch quantity.

batch type. A code assigned to a batch job that designates to which system the associated transactions pertain, thus controlling which records are selected for processing. For example, the Post General Journal program selects for posting only unposted transaction batches with a batch type of O.

bill of material (BOM). A listing of all the subassemblies and raw materials that make up a parent assembly. The BOM is used with the master

production schedule to determine the items for which purchase requisitions and production orders must be released. Display formats for bills of material include single level, multi-level, indented, planning, and costed.

broadcast message. 1) An e-mail message that you send to multiple recipients. 2) A message that appears on a form instead of in your mailbox.

bucketed system. A material requirements planning, distribution requirements planning, or other time-phased system in which all time-phased data is accumulated into time periods, or buckets. If the period of accumulation is one week, then the system is said to have weekly buckets.

bucketless system. A material requirements planning, distribution requirements planning, or other time-phased system in which all time-phased data is processed, stored, and displayed using dated records rather than defined time periods, or buckets.

bulk issue. Items issued from stores to work-in-process inventory, based on quantities estimated to cover requirements of individual work centers and production lines instead of individual job orders. A bulk issue can be used to cover a period of time or to fill a fixed-size container.

business unit. See facility.

by-product. A material of positive or negative value produced as a residual of or incidental to the production process. The ratio of by-product to primary product is usually predictable. By-products might be discarded, sold as is, or used for other purposes. See also co-product and restricted by-product.

capacity requirements planning (CRP). The function of establishing, measuring, and adjusting limits or levels of capacity by determining in detail how much labor and machine resources are required to accomplish the tasks of production. Open shop orders and planned orders in the Material Requirements Planning system are inputs to CRP, which "translates" these orders into hours of work by work center and by time period.

category code. A type of user defined code for which you can provide the title. For example, if you were adding a code that designated different sales regions, you could change category code 4 to Sales Region, and define E (East), W (West), N (North), and S (South) as the valid codes. Sometimes referred to as reporting codes. See also user defined code.

certificate of analysis (COA). A document that includes all of the tests performed and resulting test data for an item lot.

chart of accounts. The structure for general ledger accounts. The chart of accounts lists types of accounts, describes each account, and includes account numbers and posting edit codes.

committed material. Material on hand or on order that is assigned to specific future production or customer orders. Sometimes referred to as reserved material.

component. A raw material, ingredient, or subassembly that is used as an element of another assembly, process, or item. A component might be packaging material for a finished item.

component changeout. See component swap.

component swap. In Equipment/Plant Management, the substitution of an operable component for one that requires maintenance. Typically, you swap components to minimize equipment downtime while servicing one of the components.

composite leadtime. See cumulative leadtime.

configuration management. A rules-based method of ordering assemble-to-order or make-to-order products, in which characteristics of the product are defined as part of the Sales Order Entry process. Characteristics are edited using Boolean logic and then translated into the components and routing steps required to produce the product. The resulting configuration is also priced and costed, based on the characteristics defined.

configured item segment. A characteristic of a configured item defined during sales order entry. For example, a customer may specify a type of computer hard drive by stating the number of megabytes of the hard drive, rather than a part number.

constants. Parameters or codes that you set and that the system uses to standardize the processing of information by associated programs.

consuming location. The point on the production line where a component or subassembly is used in the production process. Consuming location is used in kanban processing.

corrective maintenance. Any maintenance work that falls outside the scope of preventive or predictive maintenance. Corrective maintenance can be planned, unplanned, or emergency, for example,

to respond to equipment failure. Contrast with preventive maintenance and predictive maintenance.

corrective work order. A work order that is used to formally request corrective maintenance, and to communicate all details pertaining to the corrective maintenance task.

cost component. An element of an item's cost, for example, material, labor, or overhead.

cost rollup. A simulated scenario in which work center rates, material costs, and labor costs are used to determine the total cost of an item.

costed bill of material. A bill of material that extends the quantity per of every component by the cost of the components. See also bill of material.

co-product. An end item produced as the result of a process. There are usually two or more co-products. See also end item and by-product.

crew size. The number of people required to perform an operation.

critical path leadtime. See cumulative leadtime.

cross segment edit. A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.

cumulative leadtime. The longest planned length of time needed to accomplish the activity in question. For any item planned through material requirements planning, cumulative leadtime is determined by reviewing the leadtime for each bill of material path below the item. The path with the longest leadtime defines the cumulative leadtime. Sometimes referred to as critical path leadtime, aggregate leadtime, or composite leadtime.

current cost. The cost associated with an item at the time a parts list and routing are attached to a work order or rate schedule. Current cost is based on the latest bill of material and routing for the item.

data dictionary. A database table that OneWorld uses to manage the definitions, structures, and guidelines for the usage of fields, messages, and help text. J.D. Edwards has an active data dictionary, which means that it is accessed at runtime.

database. A continuously updated collection of all information that a system uses and stores. Databases make it possible to create, store, index, and cross-reference information online.

date pattern. A period of time set for each period in standard and 52-period accounting.

default. A code, number, or parameter that the system supplies when the user does not specify one.

detail. The specific information that makes up a record or transaction. Contrast with summary.

detail area. An area of a form that displays detailed information associated with the records or data items displayed on the form. See also grid.

direct labor. Labor that is applied to the product being manufactured.

direct material. Measurable quantities of material that becomes a part of the final product.

dispatch list. A list of sequenced work orders or rate schedules that contain detailed information on location, quantity, and capacity requirements. Dispatch lists are usually generated daily and are oriented by work center or line.

effectivity date. The date on which a component or an operation is to be added or removed from a bill of material or an assembly process. Effectivity dates are used in the planning process to create demands for the correct items. Normally, bills of material and routings provide for an effectivity start date (from) and stop date (through), signifying the beginning and end of a particular relationship. Sometimes referred to as effective date.

electronic commerce. See Electronic Data Interchange.

Electronic Data Interchange (EDI). The paperless, computer-to-computer exchange of business transactions, such as purchase orders and invoices, in a standard format with standard content.

engineering change order (ECO). A work order used to implement and track a change in a manufactured product. This includes changes in design, quantity of items required, and assembly or production process.

enterprise resource planning (ERP). A closed-loop, integrated system that enables manufacturers and distributors to coordinate all of the activities necessary to fulfill customer demand. This includes activities associated with suppliers, customers, inventory, shop floor, product costing and accounting, forecasting, and planning and scheduling.

Enterprise Workflow Management. A OneWorld system that provides a way of automating tasks,

such as notifying a manager that a requisition is waiting for approval, using an e-mail-based process flow across a network.

expedite. To process production or purchase orders in less than the normal leadtime.

explosion. The process of calculating the demand for the components of a parent item by multiplying the parent item requirements by the quantity per specified in the bill of material. Sometimes referred to as requirements explosion. Contrast with implosion.

exponential smoothing. A forecasting technique in which past observations are geometrically discounted according to their age. The heaviest weight is assigned to the most recent data. The smoothing is termed exponential because data points are weighted in accordance with an exponential function of their age.

facility. An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.

family. See master planning family.

feature. A characteristic of a product or service, such as an option, accessory, or attachment.

field. 1) An area on a form that represents a particular type of information, such as name, document type, or amount. 2) A defined area within a record that contains a specific piece of information. For example, a supplier record consists of the fields Supplier Name, Address, and Telephone Number.

file. A set of information stored under one name. See also table.

finished good. See end item.

firm planned order (FPO). A work order that has reached a user defined status. When this status is entered in the processing options for the various manufacturing programs, messages for those orders are not exploded to the components.

first in, first out (FIFO). A method of inventory valuation for accounting purposes, based on the assumption that oldest inventory (first in) is the first to be used (first out). There is no relationship with the actual physical movement of specific items.

fixed cost. An expense that does not vary with the production volume, for example, setup cost.

fixed order quantity. A lot-sizing technique in MRP or inventory management whereby the system generates planned or actual orders for a predetermined quantity. If the net requirements for a period exceed the fixed order quantity, the system generates orders for multiples of the fixed order quantity.

fixed overhead. Manufacturing costs that continue even if products are not produced. Although fixed overhead is necessary to produce the product, it cannot be directly traced to the final product.

fixed quantity. A value that indicates that the amount of a component or ingredient used in the manufacturing process of an end item remains the same, regardless of the quantity of the end item produced. Contrast with variable quantity.

forecast. An estimate of future demand, determined by mathematical means using historical data, subjective estimates from informal sources, or a combination of both.

forecast consumption. The reduction of forecast demand, based on actual sales orders received or shipped, up to the forecast quantity.

form. The element of the OneWorld graphical user interface by which the user exchanges data with interactive applications. Forms are made up of controls, such as fields, options, and the grid. These controls allow the user to retrieve information, add and revise information, and navigate through an application to accomplish a task.

frozen cost. The cost of an item, operation, or process, after the frozen update program is run, that is used by the Manufacturing Accounting system.

frozen update program. A program that freezes the current simulated costs, thereby finalizing them for use by the Manufacturing Accounting system.

Gantt chart. A control chart that shows graphically the relationship between planned performance and actual performance.

grade. A rating assigned to an item, based on how well the item meets required specifications.

grid. A control that displays detail information on a form. The grid is arranged into rows, which generally represent records of data, and columns, which generally represent fields of the record. See also detail area.

header. Information at the beginning of a table or form. Header information is used to identify or

provide control information for the group of records that follows.

indented bill of material. A multi-level bill of material that lists the highest level parent items at the left margin and all the components going into the patents indented to the right of the margin. All subsequent levels of components are indented farther to the right. If a component is used in more than one parent within a given product structure, it will appear under every subassembly in which it is used.

indented where-used. A bill of material listing for one component, every parent item and subassembly, and the respective quantities required. Each of these parent items calls for the given component item in a bill of material table. The component item is shown closest to the left margin of the listing in the bill, with each parent indented to the right, and each of their respective parents indented even further to the right.

ingredient. In process manufacturing industries, the raw material or component of a recipe or formula.

integrity test. A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

interactive processing. Processing actions that occur in response to commands that you enter directly into the system. During interactive processing, you are in direct communication with the system, and it might prompt you for additional information while processing your request. Contrast with batch processing.

intermediate. Material processed beyond raw material and used in higher level items. Intermediates are not stocked in inventory, sold to customers, or planned by material requirements planning.

in-process inventory. See work-in-process (WIP).

item master. A record for an item. The item master contains descriptive data and control values (leadtimes, lot sizes, and so on), and might contain data on inventory status, requirements, planned orders, and costs. Item master records are linked together by product structure records that define the bill of material for an item.

job queue. A group of jobs waiting to be batch processed. See also batch processing.

Just-in-Time (JIT). A method of manufacturing based on planned elimination of all waste and continuous improvement of productivity. The primary elements of Just-in-Time manufacturing are to have only the required inventory when needed; to improve quality to zero defects; to reduce leadtimes by reducing setup times, queue lengths, and lot sizes; to revise incrementally the operations themselves; and to keep costs to a minimum.

kanban. Information cards attached to a group or bin of items that travel in and out of a work center. Kanbans indicate to producing work centers what has been consumed and what needs to produced next. Some companies use various shapes, sizes, and colors of cards for ease of recognition and to indicate an item's priority. OneWorld uses electronic kanbans.

labor cost. The monetary amount of labor performed during manufacturing.

ledger type. A code that designates a ledger used by the system for a particular purpose. For example, all transactions are recorded in the AA (actual amounts) ledger type in their domestic currency. The same transactions may also be stored in the CA (foreign currency) ledger type.

level. The code used for every item or assembly in a product structure to signify the relative level in which that item or assembly is used within the product structure. Normally, the end items are assigned to level 0 with the components and subassemblies of the item assigned to level 1 and so forth. The material requirements planning explosion process starts from level 0 and proceeds downward, one level at a time.

linked service type. A service type that is associated with a primary service type. Linked service types are cancelled and the maintenance tasks are performed when the primary service type to which they are linked comes due. You can specify whether the system generates work orders for linked service types, as well as the status the system assigns to work orders that have already been generated. Sometimes referred to as associated service types. See also primary service type and service type.

lot. A quantity produced together that shares the same production components. Lots are uniquely identified to allow for traceability.

lot number control. Assignment of unique numbers to each instance of receipt. This number carries forth into subsequent manufacturing processes. Thus, in

review of an end item lot, each lot consumed can be identified as having been used for the manufacture of the specific end item lot.

maintenance loop. See maintenance route.

maintenance route. A method of performing PMs for multiple pieces of equipment from a single preventive maintenance work order. A maintenance route includes pieces of equipment that share one or more identical maintenance tasks that can be performed at the same time for each piece of equipment. Sometimes referred to as maintenance loop.

maintenance work order. In J.D. Edwards systems, a term used to distinguish work orders created for the performance of equipment and plant maintenance from other work orders, such as manufacturing work orders, utility work orders, and engineering change orders.

make-to-order product. A product that is produced after receipt of a customer's order. The final product is usually a combination of standard purchased items and items specially designed to meet the needs of the customer. Frequently, long leadtime components are planned prior to the order arriving to reduce the delivery time to the customer. Contrast with assemble-to-order product. See also make-to-stock product.

manufacturing and distribution planning. Planning that includes Resource and Capacity Planning and Material Planning Operations. Resource and Capacity Planning allows you to prepare a feasible production schedule that reflects your demand forecasts and production capability. Material Planning Operations provides a short-range plan to cover material requirements that are needed to make a product.

manufacturing calendar. See work day calendar.

master planning family. Products that are grouped together for material planning purposes, based on shared characteristics.

Master Production Scheduling (MPS). The act of creating a master schedule. See also master schedule.

master schedule. A detailed statement of how many items are planned to be produced and when. The master schedule focuses on products to be made and, through the detailed planning system, identifies the resources (materials, work force, plant equipment, and capital) needed and the timing of the need. See also material requirements planning.

master table. A database table used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data, such as paid tax amounts, supplier names, addresses, employee information, and job information.

material requirements planning (MRP). A set of techniques that uses bill of material, inventory data, and the master schedule to calculate the time-phased net material requirements for every component item and subassembly. MRP suggests a replenishment plan to support the production of the quantities that are specified in the master schedule. See also master schedule.

menu masking. A security feature that lets you prevent individual users from accessing specified menus or menu selections.

model work order. In Equipment/Plant Management, a work order that functions as a template for the creation of other work orders. You can assign model work orders to service types. When the service type comes due, the system automatically generates a work order based on information from the model work order.

net added cost. The cost to manufacture an item at the current level in the bill of material. Thus, for manufactured parts, the net added cost includes labor, outside operations, and cost extras applicable to this level in the bill of material, but not materials (lower-level items). For purchased parts, the net added cost also includes the cost of materials.

next numbers. A feature used to control the automatic numbering of items such as new G/L accounts, vouchers, and addresses. Next numbers provides a method of incrementing numbers.

nonconforming product. Items that do not meet the requirements of a relevant specification, contract, regulation, or quality test.

nonsignificant item numbers. Item numbers that are assigned to each item but do not convey any information about the item. They are identifiers, not descriptors. Contrast with significant item numbers.

operation sequence. The sequential steps that an item follows in its flow through the plant. For instance, operation 10: cut bar stock; operation 20: grind bar stock; operation 30: shape; operation 40:

polish; operation 50: inspect and send to stock. This information is maintained in the routing table.

operation yield. The planned percent of output at an operation. For example, if the operation yield is 90% and 100 units are started at that operation, planned output is 90 units that will be available to the next operation.

output queue. See print queue.

overlap. The percentage by which an operation overlaps the previous operation in the sequence. For example, a 20% overlap means that a step can begin when the previous step is 80% complete.

parameter. A number, code, or character string you specify in association with a command or program. The computer uses parameters as additional input or to control the actions of the command or program.

parent item. See end item.

parent/child relationship. See parent/component relationship.

parent/component relationship. 1) In Equipment/Plant Management, the hierarchical relationship of a parent piece of equipment to its components. For example, a manufacturing line could be a parent and the machinery on the line could be components of the line. In addition, each piece of machinery could be a parent of still more components. 2) In Product Data Management, a hierarchical relationship of the components and subassemblies of a parent item to that parent item. For example, an automobile is a parent item and its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.

pay on consumption. The method of incurring a liability for items received from a supplier only when the material is used in the production process.

phantom bill of material. A bill of material used primarily for non-stocked items that represents an item that is physically built, but rarely stocked. The item is instead used in the next step or level of manufacturing. Material requirements planning uses the phantom bill of material to explode the requirements through the phantom item to its components. See also explosion.

planning bill of material. An artificial grouping of items or events in bill of material format, used to facilitate master scheduling of material planning, and forecasting. Sometimes referred to as pseudo bill of material.

planning calendar. See work day calendar.

planning family. A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

PM. Maintenance tasks and procedures that are routine and repetitive, such as periodic lubrications and filter replacements. Preventive maintenance procedures are designed to eliminate breakdowns and the need for corrective maintenance. Contrast with corrective maintenance and predictive maintenance.

potency. Identifies the percent of a process item in solution. For example, 80% solution could be used in a process that called for 100%, but would require 25% more in terms of quantity to meet the requirement (100 / 80 = 1.25).

predictive maintenance. A maintenance strategy that uses computerized data collection and analysis of equipment operating parameters to predict the point at which equipment is expected to fail and then schedules the appropriate procedures just before the expected equipment failure. Predictive maintenance can significantly reduce costs and equipment downtime by eliminating unnecessary preventive maintenance procedures. In addition, by predicting and averting catastrophic equipment failure, predictive maintenance reduces overall maintenance costs and allows for equipment to be operated for its full service life. Contrast with corrective maintenance and preventive maintenance.

preference profile. The ability to define default values for specified fields for a user defined hierarchy of items, item groups, customers, and customer groups.

preflush. To deduct materials from inventory when the parts list and routing are attached.

preventive maintenance (PM). One or more service types that are due to be performed for a piece of equipment, based on the service intervals for each service type. When you complete a preventive maintenance, a new preventive maintenance cycle begins for the service types included in the preventive maintenance.

preventive maintenance cycle. The sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most

preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.

preventive maintenance schedule. The combination of service types that apply to a specific piece of equipment, as well as the intervals at which each service type is scheduled to be performed.

primary location. The designation of a certain storage location as the standard, preferred location for an item.

primary service type. A service type to which you can link related service types. For example, for a particular piece of equipment, you might set up a primary service type for a 1000-hour inspection and a linked service type for a 500-hour inspection. The 1000-hour inspection includes all tasks performed at 500 hours. When a primary service type is scheduled to be performed, the system schedules the linked service type. See also linked service type.

print queue. A list of tables, such as reports, that you have submitted to be written to an output device, such as a printer. The computer spools the tables until it writes them. After the computer writes the table, the system removes the table identifier from the print queue.

priority. 1) The relative importance of jobs in a queue. 2) The sequence in which jobs should be completed.

processing option. A feature that allows you to direct the functions of a program. For example, processing options allow you to specify defaults for certain forms, control the format in which information prints on reports, and change how information appears on a form or in a report.

Product Data Management (PDM). In J.D. Edwards software, the system that enables a business to organize and maintain information about each item it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships among components and how they can be combined to manufacture an item. PDM also provides data for other manufacturing systems including Manufacturing Accounting, Shop Floor Management, and Manufacturing and Distribution Planning.

product family. See master planning family.

product line. A group of products whose similarity in manufacturing procedures, marketing characteristics, or specifications allow them to be aggregated for planning, marketing, and occasionally, costing. See also master planning family.

production line. A series of work centers or machines allocated to the production of a limited number of items with similar routings.

projected cost. The target expenditure in added value for material, labor, and so forth during manufacture. See also standard cost.

pseudo bill of material. See planning bill of material.

purchased part. An item bought from a supplier.

purge. The process of removing records or data from a system table.

queue. The jobs waiting to be processed at a given work center. As queues increase, so do average queue time and work-in-process inventory.

recipe. See bill of material.

record. A collection of related, consecutive fields of data that the system treats as a single unit of information.

repetitive manufacturing. Producing items in high-volume concentration, often with entire production lines dedicated to a family of products.

replacement parts. Parts that can be used as substitutes. They differ from completely interchangeable service parts in that they require some physical modification, such as cutting, drilling, and so forth, before they can replace the original part.

replenishment point. The location on or near the production line where additional components or subassemblies are to be delivered.

requirements explosion. See explosion.

reserved material. See committed material.

resource requirements planning (RRP). The process of converting the production plan into capacity needs for key resources, such as workforce, machinery, warehouse space, suppliers' capabilities, and in some cases, money. Comparison of capacity required of items in the master schedule to available capacity is usually done for each key resource.

restricted by-product. A restricted secondary or incidental product produced while making another product. Such by-products cannot be sold because

they are restricted from sale by government policies. The company might have to forego making a product if a restricted by-product is produced.

revision level. A number or letter representing the number of times a document or item has been changed.

rollup. See cost rollup.

rough cut capacity planning (RCCP). The process of converting the master schedule into capacity needs for key resources, such as workforce, machinery, warehouse space, suppliers' capabilities, and in some cases, money. Comparison of capacity required of items in the master schedule to available capacity is usually done for each key resource.

run size. See standard batch quantity.

safety stock. 1) A quantity of stock planned to be on hand to protect against fluctuations in demand or supply. 2) In Master Production Scheduling, the additional inventory or capacity planned as protection against forecast errors or short-term changes in the backlog. Overplanning can be used to create safety stock.

scheduling workbench. A multiple-function program that allows the sequencing of work orders, rate schedules, or both on a production line. Sequencing can be manual or automatic, based on user defined category code definition. Sequencing includes forward, finite scheduling, including the option to cross shifts or days.

scrap. Unusable material that results from the production process. Scrap is material outside of specifications and of such characteristics that rework is impractical.

scrap rate. See scrap factor.

sequencing. Determining the order in which a facility processes different jobs.

serial number. A unique number assigned to identify a specific item with a lot size of one.

service interval. The frequency at which a service type is to be performed. Service intervals can be based on dates, periods, or statistical units that are user defined. Examples of statistical units are hours, miles, and fuel consumption.

service type. An individual preventive maintenance task or procedure, such as an inspection, lubrication, or overhaul. Service types can apply to a specific piece of equipment or to a class of equipment. You can specify that service types come due based on a predetermined service interval, or whenever the task represented by the service type becomes necessary.

setup cost. The labor costs associated with setting up an operation for the next product.

shop calendar. See work day calendar.

Shop Floor Management. A system that uses data from Product Data Management, Master Production Scheduling, and Material Requirements Planning to create, maintain, and communicate status on shop orders (work orders).

shrink factor. A percentage factor in the item master record that compensates for expected loss during the manufacturing cycle either by increasing the gross requirements or by reducing the expected completion quantity of planned and open orders. The shrink factor differs from the scrap factor in that the former affects all uses of the part and its components and the scrap factor relates to a single component. Sometimes referred to as shrinkage rate.

shrinkage rate. See shrink factor.

significant item numbers. Item numbers that are intended to convey certain information, such as the source of the part, the material in the part, the shape of the part, and so forth. Contrast with nonsignificant item numbers.

simulated cost. After a cost rollup, the cost of an item, operation, or process according to the current cost scenario. This cost can be finalized by running the frozen update program. You can create simulated costs for a number of cost methods, for example, standard, future, and simulated current costs. See also cost rollup.

single level where-used list. A type of bill of material that lists each parent in which a specific component is directly used and in what quantity it is used.

specification. A statement of the technical requirements of an application or item and the process involved to ensure the requirements are met.

spool. The function by which the system stores generated output to await processing.

standard cost. The expected, or target cost of an item, operation, or process. Standard costs represent only one cost method in the Product Costing system. You can also calculate, for example, future costs or current costs. However, the Manufacturing Accounting system uses only standard frozen costs.

standard costing. A costing method that uses cost units determined before production. For management control purposes, the system compares standard costs to actual costs and computes variances.

standard hours. The length of time that should be required to 1) set up a given machine or operation and 2) run one part, assembly, batch, or end product through that operation. This time is used in determining machine and labor requirements. It is also frequently used as a basis for incentive pay systems and as a basis for allocating overhead in cost accounting systems.

subassembly. An assembly that is used at a higher level to make up another assembly.

substitution. To use alternate components in production when primary items are not available.

summary. The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many systems offer forms and reports that summarize information stored in certain tables. Contrast with detail.

super backflush. To create backflush transactions against a work order at pay points defined in the routing. By doing so, you can relieve inventory at strategic points throughout the manufacturing process. See also backflush.

supplier scheduling. A process of providing suppliers with consistent shipping information and advanced demand profiles to support just-in-time production and delivery. The supplier scheduling system includes a business agreement and delivery schedule for each supplier. Supplier scheduling includes a formal priority planning system and EDI functionality to provide the supplier with valid due dates.

supply chain. The link from the initial raw materials to the consumption of the finished product.

supplying location. The location from which inventory is transferred once quantities of the item on the production line have been depleted. Used in kanban processing.

system. A group of related applications identified by a name and a system code. For example, the Address Book system code is 01. All applications, tables, and menus within a system can be identified by the system code.

system code. A code that identifies a system, for example, 01 for the Address Book system and 31 for the Shop Floor Management system.

table. In database environments, a two-dimensional entity made up of rows and columns. All physical data in a database are stored in tables. See also file.

threshold percentage. In Equipment/Plant Management, the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.

traceability. The ability to trace the production history of a product for quality or warranty purposes. This is usually done through the use of lot or serial numbers to link raw materials from the supplier to the end product. Lot/serial number traceability can be a government requirement in certain regulated industries, such as the pharmaceutical or automotive industries. See also lot.

unit cost.The total cost of labor, material, and overhead for one unit of production.

unit of measure. The standard quantity by which an item is managed, such as by weight, box, package, case, each, and so forth.

user defined code (UDC). A code that users can define, assign code descriptions, and assign valid values. Examples of such codes are unit-of-measure codes, state names, and employee type codes.

user defined code type. The identifier for a table of codes with a meaning that you define for the system, such as ST for the Search Type codes table in Address Book. OneWorld provides a number of these tables and allows you to create and define tables of your own.

value added. Amount of increased worth of inventory through manufacturing, processing, or packaging.

variable quantity. A value that indicates the amount of a component or ingredient that varies based on the quantity of the end product produced. Contrast with fixed quantity.

variance. 1) In Product Costing and Manufacturing Accounting, the difference between two methods of costing the same item. For example, the difference between the frozen standard cost and the current

cost is an engineering variance. Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates. 2) In Equipment/Plant Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

vocabulary overrides. A feature that you can use to override field, row, or column title text on forms and reports.

work day calendar. A calendar, used in planning functions, that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. Sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

work order life cycle. In Equipment/Plant Management, the sequence of events through which a work order must pass to accurately communicate the progress of the maintenance tasks it represents.

work-in-process (WIP). One or more products in various stages of completion throughout the plant, including all material from raw material that has been released for initial processing up to completely processed material awaiting final inspection and acceptance as finished product. Sometimes referred to as in-process inventory.

Index

Index

H

I

L

M

N

O

P

Q

R

S

T

U

W