

# JD Edwards EnterpriseOne Quality Management 8.12 Implementation Guide

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**April 2006**

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# About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

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**Note.** Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

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## JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

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## Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

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## Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

### Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

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**Important!** Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

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### See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](http://www.oracle.com/support/support_peoplesoft.html)

### Ordering Printed Documentation

You can order printed, bound volumes of the complete line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guide CD-ROM. Oracle makes printed documentation available for each major release of JD Edwards EnterpriseOne shortly after the software is shipped. Customers and partners can order this printed documentation by using any of these methods:

- Web
- Telephone
- Email

#### Web

From the Documentation section of Oracle's PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. Use a credit card, money order, cashier's check, or purchase order to place your order.

#### Telephone

Contact MMA Partners, the book print vendor, at 877 588 2525.

**Email**

Send email to MMA Partners at [peoplebookspress@mmapartner.com](mailto:peoplebookspress@mmapartner.com).

**See Also**

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](http://www.oracle.com/support/support_peoplesoft.html)

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## Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs) (JD Edwards EnterpriseOne only)	Implement, Optimize, and Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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## Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

### Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
<b>Bold</b>	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.

## Visual Cues

Implementation guides contain the following visual cues.

### Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

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**Note.** Example of a note.

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If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

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**Important!** Example of an important note.

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### Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

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**Warning!** Example of a warning.

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### Cross-References

Implementation guides provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

## Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

## Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)
- E&G (Education and Government)

## Currency Codes

Monetary amounts are identified by the ISO currency code.

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## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about implementation guides and other Oracle reference and training materials. Please send your suggestions to Documentation Manager, Oracle Corporation, 7604 Technology Way, Denver, CO, 80237. Or email us at [documentation\\_us@oracle.com](mailto:documentation_us@oracle.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

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## Common Fields Used in Implementation Guides

### Address Book Number

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.

<b>As If Currency Code</b>	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
<b>Batch Number</b>	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
<b>Batch Date</b>	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
<b>Batch Status</b>	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are: <i>Blank</i> : Batch is unposted and pending approval. <i>A</i> : The batch is approved for posting, has no errors and is in balance, but has not yet been posted. <i>D</i> : The batch posted successfully. <i>E</i> : The batch is in error. You must correct the batch before it can post. <i>P</i> : The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to <i>E</i> . <i>U</i> : The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.
<b>Branch/Plant</b>	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
<b>Business Unit</b>	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
<b>Category Code</b>	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
<b>Company</b>	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
<b>Currency Code</b>	Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
<b>Document Company</b>	Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.  If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

**Document Number**

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

**Document Type**

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

*P*: Accounts payable documents.

*R*: Accounts receivable documents.

*T*: Time and pay documents.

*I*: Inventory documents.

*O*: Purchase order documents.

*S*: Sales order documents.

**Effective Date**

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

**Fiscal Period and Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

**G/L Date** (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

# JD Edwards EnterpriseOne Quality Management Preface

This preface discusses:

- JD Edwards EnterpriseOne products.
- JD Edwards EnterpriseOne application fundamentals.
- Common fields used in this implementation guide.

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## JD Edwards EnterpriseOne Products

This implementation guide refers to these JD Edwards EnterpriseOne products from Oracle:

- JD Edwards EnterpriseOne Inventory Management
- JD Edwards EnterpriseOne Procurement
- JD Edwards EnterpriseOne Shop Floor Management
- JD Edwards EnterpriseOne Sales Order Management
- JD Edwards Blend Management

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## JD Edwards EnterpriseOne Application Fundamentals

Additional, essential information describing the set up and design of your system appears in companion volumes of documentation called:

- *JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide*
- *JD Edwards EnterpriseOne Product Data Management 8.12 Implementation Guide*
- *JD Edwards EnterpriseOne Shop Floor Management 8.12 Implementation Guide*

### See Also

*JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide*, “JD Edwards EnterpriseOne Inventory Management Preface”

*JD Edwards EnterpriseOne Product Data Management 8.12 Implementation Guide*, “JD Edwards EnterpriseOne Product Data Management Preface”

*JD Edwards EnterpriseOne Shop Floor Management 8.12 Implementation Guide*, “JD Edwards EnterpriseOne Shop Floor Management Preface”

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## Common Fields Used in this Implementation Guide

<b>Accept Percentage and Accept Quantity</b>	<p>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 these fields on Test Definitions accordingly. Values are:</p> <p>Blank: accept quantity</p> <p><i>1</i>: display/evaluate</p>
<b>Allowed Maximum</b>	Enter the highest value for a passing test result.
<b>Allowed Minimum</b>	Enter the lowest value for a passing test result.
<b>Customer Number</b>	Enter a number that identifies an entry in the JD Edwards EnterpriseOne Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.
<b>Item Number</b>	Enter a number that the system assigns to an item. It can be in short, long, or third item number format.
<b>Number of Samples</b>	Enter the number of samples to be taken for the test.
<b>Preferred Maximum</b>	<p>Enter 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.</p> <p>Processing options for the Certificate of Analysis program enable you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.</p>
<b>Preferred Minimum</b>	<p>Enter 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.</p> <p>Processing options for the Certificate of Analysis program allow you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.</p>
<b>Print Test</b>	<p>Enter a code used to determine whether or not a test will be printed on the Certificate of Analysis. Values are:</p> <p><i>0</i>: The test will not be printed on the Certificate of Analysis.</p> <p><i>1</i>: Print all occurrences of a test on the Certificate of Analysis.</p> <p><i>2</i>: Print just the average test result record when printing the Certificate of Analysis.</p> <p><i>3</i>: 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.</p>
<b>Property</b>	Enter the item attribute that is being tested.

<b>Sample Percent</b>	<p>Enter 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.</p> <p>If the sample percentage is 100 percent, 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.</p>
<b>Sequence</b>	<p>Enter the sequence in order to set up the order in which the valid environments are displayed.</p>
<b>Target Value</b>	<p>Enter 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 the information only.</p>
<b>Test Method</b>	<p>Enter a description of how to run a quality test. The test method is useful to both the company Quality Control department and the customers. For example:</p> <p>Test: Viscosity</p> <p>Method: RVF #4 @10RPM</p> <p>Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.</p>



# CHAPTER 1

## Getting Started with JD Edwards EnterpriseOne Quality Management

This chapter discusses:

- JD Edwards EnterpriseOne Quality Management overview.
- JD Edwards EnterpriseOne Quality Management integrations.
- JD Edwards EnterpriseOne Quality Management implementation.

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### JD Edwards EnterpriseOne Quality Management Overview

Total Quality Management (TQM), continuous improvement, quality assurance, and quality systems are phrases that refer to the concept of measuring quality. These phrases are used in a wide variety of industries. Whether a company has an elaborate quality management system or a simple program for collecting data, the goal is the same: meeting or exceeding quality expectations in the most timely and cost-effective manner.

You can use the JD Edwards EnterpriseOne Quality Management system from Oracle to support a TQM program. This system provides an integrated, yet flexible, solution to collect, verify, and manage the data that you need to meet internal quality standards and support customer requirements.

The JD Edwards EnterpriseOne Quality Management system helps you record and manage data that relates to the material quality of the 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 the business by:

- 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 user-defined points in the business cycle, you collect samples and perform quality tests. Then, you can use the JD Edwards EnterpriseOne 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.

You can verify whether the material that you produce meets the specifications at different points in the 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:

- 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.

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## JD Edwards EnterpriseOne Quality Management Integrations

The JD Edwards EnterpriseOne Quality Management integrates with these EnterpriseOne systems from Oracle:

- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne Procurement.
- JD Edwards EnterpriseOne Shop Floor Management.
- JD Edwards EnterpriseOne Sales Order Management.
- JD Edwards Blend Management.

The JD Edwards EnterpriseOne Quality Management system works with other JD Edwards EnterpriseOne systems. We discuss integration consideration in the implementation chapters in this implementation guide. Supplemental information about third-party application integrations is located on the Customer Connection website.

### JD Edwards EnterpriseOne Inventory Management

As you work with lots in the JD Edwards EnterpriseOne Inventory Management system, you can locate test results by lot number to determine which lots have passed or failed quality testing. When you access Test Results Inquiry from JD Edwards EnterpriseOne Inventory Management using the Lot Availability (P41280) or Lot Master Revision program (P4108), you see test results exactly as they were input.

### JD Edwards EnterpriseOne Procurement

These procurement programs access the JD Edwards EnterpriseOne Quality Management system:

- Purchase Order Receipts program (P4312).
- Receipt Routing Movement and Disposition program (P43250).

### JD Edwards EnterpriseOne Shop Floor Management

These JD Edwards EnterpriseOne Shop Floor Management programs access the JD Edwards EnterpriseOne Quality Management system:

- Manufacturing Work Order Processing program (R31410).
- Work Order Completions program (P31114).
- Super Backflush program (P31123).
- Work Order Time Entry program (P311221).

## JD Edwards EnterpriseOne Sales Order Management

If you use the JD Edwards EnterpriseOne Sales Order Management system, you use customer billing instructions to indicate whether customers should receive a certificate of analysis. You can set up the customer billing instructions to generate a certificate of analysis automatically for a particular customer when shipments are confirmed.

As you work with lots in the JD Edwards EnterpriseOne Sales Order Management system, you can locate test results by lot number to determine which lots have passed or failed quality testing.

If you use the JD Edwards EnterpriseOne Sales Order Management system, you can access the JD Edwards EnterpriseOne Quality Management system using the Shipment Confirmation program (P4205).

## JD Edwards Blend Management

If you use the JD Edwards Blend Management system, you will track the quality of the grapes at receipt and the quality of a lot of wine at various stages in the winemaking process.

During the winemaking process, you take samples of the wine to perform various quality tests, such as tests for sugar and alcohol content on the lots of wine. Use the Test Result Name program for combining groups of similar tests. For example, there are different tests to check the sugar content of wine. All of the sugar tests can have a Test Result Name of *Sugar Content*.

If you use the JD Edwards Blend Management system, generally you access the JD Edwards EnterpriseOne Quality Management programs using the Blend Management - Blend Quality Management menus (G31B04). You can access the Test Result Names program (P37013) from the Quality Management menu (G3741); however, the data is for informational purposes only.

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# JD Edwards EnterpriseOne Quality Management Implementation

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne Quality Management system.

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About This Documentation*, with information about where to find the most current version of each.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Quality Management, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time required to search and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools 8.96 Software Update Guide*

## See Also

*About This Documentation*, “About This Documentation Preface”[“About This Documentation Preface,”](#)  
[page ix](#)

## Global Implementation Steps

This table lists the suggested global implementation steps for the JD Edwards EnterpriseOne Quality Management system:

Step	Reference
1. Set up global UDC tables.	<i>JD Edwards EnterpriseOne Tools 8.96 Foundation Guide</i>
2. Set up fiscal date patterns.	<i>JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide</i> , "Setting Up Organizations," Setting Up Fiscal Date Patterns
3. Set up companies.	<i>JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide</i> , "Setting Up Organizations," Setting Up Companies
4. Set up business units.	<i>JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide</i> , "Setting Up Organizations," Setting Up Business Units
5. Set up next numbers.	<i>JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide</i> , "Setting Up Next Numbers"
6. (Optional) Set up accounts, and the chart of accounts.	<i>JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide</i> , "Creating the Chart of Accounts," Setting Up Accounts
7. Set up the General Accounting Constants.	<i>JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide</i> , "Setting Up the General Accounting System," Setting Up Constants for General Accounting
8. Set up multicurrency processing, including currency codes and exchange rates.	<i>JD Edwards EnterpriseOne Multicurrency Processing 8.12 Implementation Guide</i>
9. (Optional) Set up ledger type rules.	<i>JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide</i> , "Setting Up the General Accounting System," Setting Up Ledger Type Rules for General Accounting
10. Set up address book records.	<i>JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide</i> , "Entering Address Book Records"
11. Set up default location and printers	<i>JD Edwards EnterpriseOne Tools 8.96 Foundation Guide</i>
12. Set up branch/plant constants.	<i>JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide</i> , "Setting Up the Inventory Management System," Defining Branch/Plant Constants
13. Set up Manufacturing/Distribution automatic accounting instructions (AAIs).	<i>JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide</i> , "Setting Up the Inventory Management System," Setting Up AAIs in Distribution Systems

Step	Reference
14. Set up document types.	<i>JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide, "Setting Up the Inventory Management System," Setting Up Document Type Information</i>
15. Set up shop floor calendars.	<i>JD Edwards EnterpriseOne Shop Floor Management 8.12 Implementation Guide, "Setting Up Shop Floor Management," Setting Up Shop Floor Calendars</i>
16. Set up manufacturing constants.	<i>JD Edwards EnterpriseOne Product Data Management 8.12 Implementation Guide, "Setting Up Product Data Management," Setting Up Manufacturing Constants</i>

## JD Edwards EnterpriseOne Quality Management Implementation Steps

This table lists the implementation steps for the JD Edwards EnterpriseOne Quality Management system:

Step	Reference
1. Activate Quality Management.	<a href="#">Chapter 3, "Setting Up EnterpriseOne Quality Management," Activating EnterpriseOne Quality Management, page 12</a>
2. Define tests.	<a href="#">Chapter 3, "Setting Up EnterpriseOne Quality Management," Defining Tests, page 13</a>
3. Enter user-defined codes.	<a href="#">Chapter 3, "Setting Up EnterpriseOne Quality Management," Entering UDCs, page 24</a>
4. Define specifications.	<a href="#">Chapter 3, "Setting Up EnterpriseOne Quality Management," Defining Specifications, page 25</a>
5. Set up preference profiles.	<a href="#">Chapter 3, "Setting Up EnterpriseOne Quality Management," Setting Up Preference Profiles, page 27</a>
6. Set up inclusion rules for test results tracing.	<a href="#">Chapter 3, "Setting Up EnterpriseOne Quality Management," Setting Up Inclusion Rules for Test Results Tracing, page 39</a>
7. Set up customer billing instructions for Quality Management.	<a href="#">Chapter 3, "Setting Up EnterpriseOne Quality Management," Setting Up Customer Billing Instructions for EnterpriseOne Quality Management, page 39</a>



## CHAPTER 2

# Understanding the EnterpriseOne Quality Management System

This chapter discusses:

- JD Edwards EnterpriseOne Quality Management features.
- JD Edwards EnterpriseOne Quality Management tables.

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## JD Edwards EnterpriseOne Quality Management Features

This section discusses:

- Tests
- Specifications
- Preference profiles
- Test results entry
- Information review
- Generic text entry

### Tests

You can set up an unlimited number of tests to perform within the 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 the product tests, both for the customers and for 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 JD Edwards EnterpriseOne Quality Management system, as well as from programs in other systems. After you enter test results, the system evaluates whether the results are within minimum and maximum values and sets each lot status to pass or fail.

You can enter test results during these steps in 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 production is complete.
- 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 JD Edwards EnterpriseOne 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 the customers. The COA includes all of the tests that were performed and the resulting test data for lots that were sold to a customer.

For items that require testing, and for which the item names have changed during reclassification, you can review and trace lots through product records. You can also review nonconforming lots, which are those that have failed quality tests.

## Generic Text Entry

As you work with tests, you can enter additional information using generic text.

Use generic text to indicate tools, testing equipment, and sampling methods for this test related information:

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

## JD Edwards EnterpriseOne Quality Management Tables

The JD Edwards EnterpriseOne Quality Management system uses these tables:

Table Name	Description
F3701 table	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 table	Contains the description of the specification and effectivity dates.
F37021 table	Contains information about the different tests that are grouped within the specification.
F3703 table	Contains records of failed tests.
F3711 table	Contains the test results for an item and lot number in inventory or on a work order, purchase order, or sales order.
F3711Z1 table	Contains test results uploaded from a Laboratory Information Management (LIM) system.
F37900 table	Contains test results that print on the certificate of analysis or Product Test report (R37901).
F40318 table	Identifies which tests or specifications are required for an item, item group, customer, or customer group.
F40318R table	Contains historical information about the number of times that a preference has been used on sales orders.



## CHAPTER 3

# Setting Up EnterpriseOne Quality Management

This chapter provides an overview of the JD Edwards EnterpriseOne Quality Management setup and discusses how to:

- Activate the JD Edwards EnterpriseOne Quality Management system.
- Define tests.
- Enter user-defined codes (UDCs).
- Define specifications.
- Set up preference profiles.
- Work with approval processing.
- Review tests and specifications.
- Set up inclusion rules for test results tracing.
- Set up customer billing instructions for the JD Edwards EnterpriseOne Quality Management system.

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## Understanding EnterpriseOne Quality Management Setup

This section lists prerequisites and discusses system setup.

### Prerequisites

Before you can set up the JD Edwards EnterpriseOne Quality Management system, you must:

- Activate lot control for the items that you want to measure to measure item quality by lot.

See *JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide*, “Using Lot Processing,” Entering Lot Information.

- Determine which characteristics to include in the test for each item that you are measuring to measure item quality.

### System Setup

You can customize the JD Edwards EnterpriseOne Quality Management system to meet the specific testing needs of the 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 the JD Edwards EnterpriseOne Quality Management system, you must set up:

- Branch/Plant constants
- Tests

- (Optional) Specifications
- Preference profiles

With the exception of setting up branch/plant constants in the JD Edwards EnterpriseOne Inventory Management system, you perform these setup activities in the JD Edwards EnterpriseOne Quality Management system.

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**Note.** To use the JD Edwards EnterpriseOne Quality Management system, you must activate it at the system level and the branch/plant level.

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## Activating EnterpriseOne Quality Management

This section discusses how to:

- Activate EnterpriseOne Quality Management at the system level.
- Specify each branch or plant to include in quality control testing.

### Forms Used to Activate EnterpriseOne Quality Management

Form Name	FormID	Navigation	Usage
EnterpriseOne System Control Revisions,	W99410B	Quality Management Setup (G3741), Activate Quality Management  Select the record with SY37 as the data item on the Work With EnterpriseOne System Control form, and click the Select button.  Select Yes, and click OK.  Verify that <i>Yes</i> is in the Use Module field on the Work With EnterpriseOne System Control form.	Activate JD Edwards EnterpriseOne Quality Management at the system level.
Branch/Plant Constants	W41001H	Inventory Setup (G4141), Branch/Plant Constants  Select a Branch/Plant on the Work With Branch/Plant Constants form, and click the Select button.  Select Quality Control (Y/N) on the Branch/Plant Constants form, and click OK.	Specify each branch/plant that you want to include in quality control testing.

### Activating EnterpriseOne Quality Management at the System Level

Access the JD Edwards EnterpriseOne System Control Revision form.

**Yes** Select to indicate that this module is installed in the system.

## Specifying Each Branch or Plant to Include in Quality Control Testing

Access the Branch/Plant Constants form.

Branch/Plant Constants form

**Branch/Plant** Displays a code 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.

**Quality Control (Y/N)**(quality control (yes or no) Select to activate the JD Edwards EnterpriseOne Quality Management system (system 37) for this branch/plant.

## Defining Tests

This section provides an overview of testing and discusses how to:

- Set processing options for Test Revisions (P3701).
- Define tests.
- Set up test result names.

## Understanding Testing

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

You provide this information for each test:

- Test description.
- Test effective and expiration dates.
- Method for recording results.
- Number of test samples.
- Method for evaluating results.
- Information to print on the certificate of analysis.
- Methods and reference numbers of the American Society of Testing Material (ASTM).

For each test that you set up, you can define whether it is required, optional, or guaranteed. The test type indicates whether you have to enter test results for this test.

This table shows each type of test:

Test Type	Explanation
Required	When you define a test as required, you must enter test results for this test. If the test results indicate failing values, the lot fails and is set to the status that you indicated in the processing options of the Enter Test Results program (P3711). When you do not enter values for a required test, those blank records are considered failing values, and the lot is dispositioned, based on the information in the Accept Quantity or Accept Percentage field for that test.
Optional	When you define a test as optional, you do not have to enter test results for this test. When you do not enter results, the lot does not fail. When you enter failing values for optional tests, however, the lot might fail, based on the information in the Accept Quantity or Accept Percentage field for that test.
Guaranteed	When you define a test as guaranteed, you must enter test results for this test. Guaranteed tests are tests that you certify as being a part of the quality assurance methodology of the organization. You can set the Display/Evaluate Test option in the test definition to not display test results at test results entry, but guaranteed tests always print on certificates of analysis.

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. When you enter test results, you can select a processing option to copy information or instructions from tests or preferences to test results.

Preferences enable you to customize tests and specifications for any combination of:

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

If you set up alphanumeric test result values, you can set up a UDC list that contains the alphanumeric results and their corresponding numeric values. The system uses this list to determine whether 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 enable you to enter free-form test results. For example, you might set up a test to calibrate equipment and record when the test is performed. In this case, you are not concerned with a test result value.

In addition, you can use the Equipment Row or Form exit to access the Test Equipment Revisions form. You use this form to set up equipment that you use in conjunction with a test. For example, if you use a meter to perform a pH test on a lot of wine, you enter the data about the meter in the system. The system stores equipment data in the Test Equipment (F37011) table. Additionally, you can use the Consumables Row or Form exit to access the Consumables Revisions form. You use this form to set up consumables that you use in conjunction with a test. For example, if you use litmus paper or latex gloves when performing a pH test, you must set up these consumable items in the system. You can then attach these consumables to a test definition. The system stores the information for these items in the Test Consumables (F37012) table.

If you use the JD Edwards Blend Management system you perform various quality tests on each lot of wine. You can set up test result names to group similar tests with different test definitions (a set of test specifications). For example, you might have a pH test with a test definition that requires you to use a test strip and another pH test with a test definition that requires you to use a meter. The test definitions are different, but the result from both tests is a pH result.

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**Note.** When you set up test result names, it is recommended that you do not use a user-defined character in the Test Result Name field. For example, do not use any user-defined characters that you set on the Pricing Constants form or special characters, such as &, %, !, ?, @, \$, | or #. When you use test result names in conjunction with formulas in the JD Edwards EnterpriseOne Advanced Pricing system, the system does not interpret this symbol in both the formula and the test result name. For example, you want to reduce the purchase price of grapes by 10 percent for every Brix test result below 23. A Brix test result of 22 reduces the price by 10 percent, a Brix test result of 21 reduces the price by 20 percent, and so forth. For example, the formula in Advanced Pricing might be:

```
((23-@BRIX)*-.1)*#UPRC
```

In this example, the @ symbol is part of the formula to determine the price of the grapes based on the Brix test result. If you use a symbol in the formula and add a test result name with a symbol, the system does not distinguish between the two symbols.

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See *JD Edwards EnterpriseOne Blend Management 8.12 Implementation Guide*, “Setting Up Quality Management”.

After you set up tests, you can review and revise them. You can also print a Test Definition report (R37410).

## Form Used to Define Tests

Form Name	FormID	Navigation	Usage
Test Definition Revisions	W3701A	Quality Management Setup (G3741), Test Revisions Click the Add button on the Work With Test Definitions form.	Define tests.
Test Result Name Revisions	W37013B	Quality Management Setup (G3741), Test Result Names Click Add on the Work with Test Result Name form.	Set up the test result names for the quality tests that you perform.

## Setting Processing Options for Test Revisions (P3701)

These processing options control default processing for the Test Revisions program.

### Defaults

This processing option indicates which status a test definition must have for the system to display it.

**Status** Specify which test definitions the system displays. Values are:  
 Blank: Display only active test definitions.  
 1: Display only test definitions which are pending approval.  
 2: Display only historical test definition information.  
 3: Display only rejected change requests.

### Process

This processing option specifies whether the systems stores history information for test definitions.

**Log History** Specify whether the system records the existing test definition before applying modifications. When recording the test definition, the system saves an image as history information. The saved information can be viewed online or in a report by selecting the History option on the Defaults tab in the processing options for Test Revisions (P3701). Values are:  
 Blank: Do not record.  
 1: Record.

### Workflow

This processing option specifies whether workflow approval processing is activated when you modify test definitions.

**Workflow** Specify whether to activate workflow approval processing when modifications are made to test definitions. When you activate workflow, the revised test definition must be approved before the test definition is available for use. Values are:  
 Blank: Not activated; revised test definition is available for immediate use.

*I*: Activated; revised test definition is approved before the test definition is available for use.

## Defining Tests

Access the Test Definition Revisions form.

**Test Revisions - Test Definition Revisions**

OK Cancel Form Tools

Test ID: PT-01 Branch/Plant: M30  
 Description: Bottle pressure test Status: Active/Approved  
 Effective From: 01/01/98 Thru: 12/31/10

**Definition** Result Ranges Descriptions

Test Type	Display/Print/Lab	Sample Information
<input checked="" type="radio"/> Required	Display/Evaluate Test: 1	Number of Samples: 1
<input type="radio"/> Optional	Print Test: 1	Sample Percentage:
<input type="radio"/> Guaranteed	<input checked="" type="checkbox"/> Print Text	Sample Size: 1
	Lab:	Accept Quantity: 1
		Accept Percentage:
		Sample Size UOM: BT
		Sample Method:
		Consolidation:
		Container:
		Closure:

Test Definition Revisions form

**Test ID** Enter the unique identification of the test to be performed on an item. For example:  
 COL: Color test  
 DENS: Density test  
 CL-2: Clarity test

**Effective From** Enter a date that indicates the beginning date the test is effective.  
 The default is the current system date. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in the JD Edwards EnterpriseOne Product Costing, JD Edwards EnterpriseOne Shop Floor Management, and JD Edwards EnterpriseOne Capacity Requirements Planning systems. The JD Edwards EnterpriseOne Material Requirements Planning system determines valid components by effectivity dates, not by

the bill of material revision level. Some forms display data based on the effectivity dates you enter.

**Thru** (effective through)

Enter a date that indicates the end date the test is effective.

The default is December 31 of the default year defined in the Data Dictionary for Century Change Year. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in the JD Edwards EnterpriseOne Product Costing, JD Edwards EnterpriseOne Shop Floor Management, and JD Edwards EnterpriseOne Capacity Requirements Planning systems. The JD Edwards EnterpriseOne Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.

### Definition Tab, Test Type

Select the Definition tab.

**Required**

Select if you want result values to be within the allowable range for the test to pass. The system does not allow an item to pass quality inspection until you enter results for each required test.

**Optional**

Select if you want result values to be optional during results entry. The system does not require the entry of a result for each optional test. However, if you enter failing results, the item fails quality inspection.

**Guaranteed**

Select if you want result values to be 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.

### Definition Tab, Display/Print

Specify which information appears on the certificate of analysis.

**Display/Evaluate Test**

Enter 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. 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.

<b>Print Test</b>	Enter a code used to determine whether or not a test will be printed on the Certificate of Analysis. Values are: <i>0</i> : The test will not be printed on the Certificate of Analysis. <i>1</i> : Print all occurrences of a test on the Certificate of Analysis. <i>2</i> : Print just the average test result record when printing the Certificate of Analysis. <i>3</i> : 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.
<b>Print Text</b>	Determines whether the generic text for an item that is input through Test Result Revisions (P37111) will be printed on the Certificate of Analysis. Values are: <i>1</i> : Print. <i>0</i> : Do not print.
<b>Lab</b>	Enter a number that identifies an entry in the Address Book system for a lab.

### Definition Tab, Sample Information

Define information about the sample.

<b>Number of Samples</b>	Enter the number of samples to be taken for the test.
<b>Sample Percentage</b>	Enter the percentage of an order quantity, which 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 percent, then testing is required for every unit on the order. You cannot use Accept Percentage or Accept Quantity, as all units on the order must pass for the lot to pass.
<b>Sample Size</b>	Enter the quantity of one sample to be taken for the test. As the system does not use this field, it is for information only.
<b>Accept Quantity</b>	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 these fields on Test Definitions accordingly. Values are:  Blank: Accept percentage <i>1</i> : Display/evaluate
<b>Accept Percentage</b>	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 these fields on Test Definitions accordingly. Values are:  Blank: Accept quantity <i>1</i> : Display/evaluate

- Sample Size UOM** (sample size unit of measure) Enter an identifying value for the unit of measure for a sample you take to test. Examples of units of measure include barrels, gallons, hours, and cubic yards.
- Consolidation** Enter a UDC (37/CN) that indicates if samples can be consolidated and if consolidation is cumulative or reuse.
- Container** Enter a UDC (37/CR) to indicate the container to use for the sample.
- Closure** Enter a UDC (37/CL) to indicate closure for the sample container.

### Result Ranges Tab, Alpha/Numeric

Select Results Ranges.

Specify how results will appear. You can either enter a UDC to stipulate testing requirements, or leave the UDC fields blank and enter results in free-form text. If you allow free-form text for results, any value in the test result passes.

Definition	Result Ranges	Descriptions
<b>Alpha/Numeric</b>		
<input type="checkbox"/> Numeric		
Product Code	<input type="text" value="37"/>	
User Defined Codes	<input type="text" value="YN"/>	
Display Decimals	<input type="text" value="0"/>	
<b>Result Ranges</b>		
Allowed Minimum	<input type="text" value="YES"/>	
Preferred Minimum	<input type="text" value="YES"/>	
Target	<input type="text" value="YES"/>	
Preferred Maximum	<input type="text" value="YES"/>	
Allowed Maximum	<input type="text" value="YES"/>	
Result Unit of Measure	<input type="text"/>	
Test Result Name	<input type="text"/>	
<b>Blend Management</b>		
Threshold Percent	<input type="text" value=".0000"/>	
Result Duration	<input type="text"/>	
Result Conversion ID	<input type="text"/>	

Test Definition Revisions form, Results Ranges tab

- Numeric** Select to indicate that the result value is numeric and should be right justified.  
Clear to indicate that the result value is alphanumeric and should be left justified. Tests that are using alphanumeric result values can have UDC tables set up 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.

- Product Code** Enter a UDC (98/SY) that identifies a system. Values are:  
  - 01: Address Book
  - 03B: Accounts receivable
  - 04: Accounts payable

09: General accounting

11: Multicurrency

The system code and UDC are used in combination to define test results and to associate an alphanumeric test result with a number and evaluate the test.

**User-defined Codes**

Enter a code that identifies the table that contains UDCs. The table is also referred to as a UDC type.

The system code and defined code are used in combination to define test results and to associate an alphanumeric test result with a number and evaluate the test.

**Display Decimals**

Enter a value that designates the number of decimals in the currency, amount, or quantity fields the system displays.

Determines the number of decimals in minimum and maximum values and in test results entry.

**Result Ranges Tab, Result Ranges**

Select the Result Ranges tab.

**Allowed Maximum**

Enter the highest value for a passing test result.

**Preferred Minimum**

Enter 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 program enable you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions program enable you to evaluate samples against the preferred values.

**Target**

Enter 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 the information only.

**Preferred Maximum**

Enter 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 program enable you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions program enable you to evaluate samples against the preferred values.

**Allowed Minimum**

Enter the lowest value for a passing test result.

**Result Unit of Measure**

Enter a UDC (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.

**Test Result Name**

Enter the name of the test result name.

**Result Ranges Tab, Blend Management**

Enter values in these fields *only* if you use the JD Edwards Blend Management system.

**Threshold Percent**

Enter the allowed percentage of variation from the previous result.

**Result Duration** Enter the number of days result is valid. This value is used to determine the result expiration date.

**Result Conversion ID** Enter the conversion table ID to use to convert a test result. For example, a test result is entered in Fahrenheit but must be recorded in Celsius.

### Descriptions Tab, Descriptions

Select the Descriptions tab. Complete the category codes.

Identify a recommended testing procedure of the American Society of Testing Material.

Category Codes			Descriptions	
Code 1	<input type="text" value="101"/>	<i>Pre-Production</i>	ASTM Reference	<input type="text" value="D2561-95"/>
Code 2	<input type="text" value="204"/>	<i>Receiving Inspection</i>	Test Method	<input type="text" value="Burst tester"/>
Code 3	<input type="text" value="301"/>	<i>Destructive</i>	Property	<input type="text"/>
Code 4	<input type="text" value="401"/>	<i>Mechanical</i>	Test Duration	<input type="text"/>
Code 5	<input type="text"/>			

Test Definition Revisions form, Descriptions tab

**ASTM Reference** (American Society of Testing Material reference) Identifies a recommended testing procedure of the American Society of Testing Material.

**Test Method** Enter a description of how to run a quality test. The test method is useful to both the company Quality Control department and the 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** Enter the item attribute that is being tested.

**Test Duration** Enter the number of days it takes to complete a test.

### Setting Up Test Result Names

Access the Test Result Name Revisions form.

**Test Result Names - Test Result Name Revisions**

OK Cancel Form Tools

Test Result Name

Description

---

**Alpha/Numeric**

Numeric

Product Code

User Defined Codes

Display Decimals

**Result Ranges**

Allowed Minimum

Preferred Minimum

Target

Preferred Maximum

Allowed Maximum

Result UOM

---

**Blend Management**

Blend Rule  *No calculation-value is blank*

Test Result Name Revisions form

**Test Result Name** Enter the name for the test result.

---

**Note.** It is recommended that you do not use a user-defined character in this field. For example, do not use any user-defined characters that you set on the Pricing Constants form or special characters, such as &, %, !, ?, @, \$, | or #. When you use test result names in conjunction with formulas in the JD Edwards EnterpriseOne Advanced Pricing system, the system does not interpret this symbol in both the formula and the test result name.

---

**Description** Enter brief information, a remark, or an explanation about the test result.

**Numeric** Select to indicate that the result value is numeric and right justified. Clear and the result value is alphanumeric and left justified.

Tests that are using alphanumeric result values can have UDC tables set up 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** Enter a value to designate the number of decimals in the amount or quantity fields that appear.

**Allowed Minimum** Enter the lowest value for a passing test result.

**Preferred Minimum** Enter the lowest value for the preferred test result. This value must be greater than or equal to the value that you enter in the Allowed Minimum field. Use the preferred minimum value to measure quality to a more precise specification than a customer requests.

	Processing options for the Certificate of Analysis (R37900) program enable you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions (P3701) program enable you to evaluate samples against the preferred values.
<b>Target</b>	Enter the target or preferable test result within the test results range. The system does not validate against a target value; this field is for information purposes only.
<b>Preferred Maximum</b>	Enter the highest value for the preferred test result. This value must be less than or equal to the value that you enter in the Allowed Maximum field. Use the preferred maximum value to measure quality to a more precise specification than a customer requests.  Processing options for the Certificate of Analysis (R37900) program enable you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions (P3701) program enable you to evaluate samples against the preferred values.
<b>Allowed Maximum</b>	Enter the highest value for a passing test result.
<b>Result UOM</b> (result unit of measure)	Enter a UDC (37/UM) to identify the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.
<b>Blend Rule</b>	Enter a UDC (31B/QB) to indicate the blending rule for results.

---

## Entering UDCs

When you set up alphanumeric values for test results, you can set up a UDC table (37/C1), which contains the alphanumeric results and their corresponding numeric values. The system uses this list to evaluate whether an alphanumeric test result is within the range of minimum and maximum values.

For each UDC, the second description column contains a numeric value that represents the value of the alphanumeric code. You should use whole numbers instead of decimals in the Description-2 field.

For example, for an alphanumeric test result of color, you might enter these 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.

---

**Important!** If you need to use decimals, the second description number must be in the appropriate format for the decimal environment, including the use of separators such as commas or decimals. The number of decimals defined in the Test Revisions program (P3701) must equal the number of decimals in the UDC list. Changing decimals after you set them up might produce unpredictable results.

---

Enter *UDC* in the Fast Path. Locate the UDC and click Add.

---

## Defining Specifications

This section provides an overview of specifications and discusses how to:

- Set processing options for Specification Revisions (P3702).
- Define specifications.

## Understanding Specifications

A specification is a group of tests that are always performed at the same time. As you define a specification, you determine which tests to perform at the same time. If you sequence the tests within a specification, the tests appear in the sequenced order in the test results. Specifications can be unique to a single branch/plant or common for 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.

---

**Note.** You cannot customize tests within a specification. Use preferences when you need to customize tests and specifications.

---

For each specification, you can define:

- Name.
- Description.
- The tests to include in the specification.

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

---

**Note.** 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.

---

## Prerequisites

Before you can define specifications:

- Set the processing option for the Specification Revisions program (P3702) to activate workflow and use the approval process.
- Set the processing option for the Specification Revisions program to log changes to specification definitions to create historical information.

## Form Used to Define Specifications

Form Name	FormID	Navigation	Usage
Specification Revisions	W3702C	Quality Management Setup (G3741), Specification Revisions  Click the Add button on the Work With Specifications form.	Define specifications.

## Setting Processing Options for Specification Revisions (P3702)

These processing options control default processing for the Specification Revisions program.

### Defaults

This processing option specifies which status a specification must have for the system to display it.

- 1. Status** Specify a status to filter specifications. Values are:
- 1*: Display only specifications which are pending approval.
  - 2*: Display only historical specification information.
  - 3*: Display only rejected change requests.
  - Blank: Display only active specifications will display.

### Process

This processing option specifies whether the system stores history information for specifications.

- 1. Log History** Specify whether the system logs additions to, modifications of, and deletions of test definitions. When you activate workflow, any addition to, change to, or deletion of a test definition must be approved before the revision is available for use. The system logs these before images as history information, and they can be viewed online or through reports by selecting the history status (status value is 2). Values are:
- Blank: Do not perform.
  - 1*: Perform.

### Workflow

This processing option specifies whether workflow approval processing is activated when specifications are modified.

- Workflow** Specify whether to activate workflow approval processing. When you activate workflow, any addition to, change to, or deletion of a test definition must be approved before the revision is available for use. Values are:
- Blank: Not activated; revisions are available for use immediately.
  - 1*: Activated.
- Revisions must be approved before they are available for use.

## Defining Specifications

Access the Specification Revisions form.

**Specification Revisions - Specification Revisions**

Specification: D002      Branch/Plant: M30  
 Description: Fill Tests      Status:   
 Revision Level: 001

**Category Codes**

Code 1: 140      Code 3: 302      Code 5: 504  
 Code 2:      Code 4: 404

Seq	Test Identification	Branch Plant	Description	Allowed Minimum	Preferred Minimum	Target Value	Preferred Maximum	Allowed Maximum
1	SD-01	M30	Compare color - Test Stri	1	1	2	2	2
2	SD-02	M30	Check fill level	F02	F02	F02	F03	F03
3	SD-03	M30	Verify safety seal	YES	YES	YES	YES	YES
4	SD-04	M30	Verify bottles clear of debu	YES	YES	YES	YES	YES
5								

Specification Revisions form

**Branch/Plant**

(Optional) Enter a code that identifies a branch/plant. If you leave this field blank, the specification is valid for all branches.

**Code 1, Code 2, Code 3, Code 4, and Code 5**

Complete any of these fields to categorize specifications into groups. Use these fields in conjunction with the Specifications Report (R37415) to help you manage the specifications that exist for a certain branch/plant, for example. You can set the data selection for the Specifications Report to print only specifications with specific category codes.

**Seq (sequence)**

Enter a number used to determine the sort order of tests and specifications within preference profiles (item/test specifications).

**Test Identification**

Use this field (as well as the Seq field) to group the tests within a specification.

## Setting Up Preference Profiles

This section provides an overview of preference profiles, lists prerequisites, and discusses how to:

- Set processing options for Preference Profile Quality Management (P40318).
- Set up a quality preference master record.
- Define preference profiles.
- Customize display criteria.
- Split specifications.

## Understanding Preference Profiles

In the JD Edwards EnterpriseOne Quality Management system, preference profiles enable you to customize tests and specifications. A specification is a group of tests that are performed at the same time or serve a similar function.

You can use a preference profile to customize tests and specifications for any combination of customer, customer group, item, or item group. The system uses preference profiles to determine the testing that should occur for any item, given the types of preference profiles that are user-defined for the item. Preference profiles also provide some limited control of access to Quality Management forms because quality testing is performed only for items that have related preferences.

Typically, you create preference profiles when you have consistent business requirements:

- Specifications from the customers.
- Policies set by the company.
- Rules set by a regulatory agency.

An example of a preference is a customer test requirement 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, not the specification itself, pass or fail quality testing.

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:

- 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.

### Preference Master Record Set Up

Before you begin to define the JD Edwards EnterpriseOne Quality Management system preferences, you must set up the preference master record for EnterpriseOne Quality Management. When you define a hierarchy for a preference type, the hierarchy settings apply throughout the system and cannot be modified for individual branch/plants. The preference type for EnterpriseOne Quality Management is hard coded to 18.

The preference hierarchy that you define for EnterpriseOne Quality Management uses additive preferencing. When you enter test results, the system uses additive preferencing to locate all tests that match the combinations of customer number, customer group, item number, and item group defined in the preference hierarchy. To prevent multiple instances of the same test from being used in the same sample, the system uses only the test listed for the first matching combination of each type.

## Specification Splits

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

---

**Important!** If you split a specification, you cannot reassemble it. You can split a specification to view its component tests. The specification is not actually split until you click OK on the Quality Management Profile Revisions form. If you need to restore the specification within the preference, you can delete the separate tests within the preference and enter the specification on a new line. Deleting test or specification records in a preference profile does not affect the test master or specification master records.

---

## Prerequisites

Before you can set up preference profiles:

- Set up the customer information in the Address Book if you define tests and enter test results by customer.
- Set up the item numbers in the Item Master (F4101) and Item Branch File (F4102) tables if you define tests and enter test results by item.

See *JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide*, “Entering Item Inventory Information,” Entering Item Master Information.

See *JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide*, “Entering Item Inventory Information,” Entering Branch/Plant Information.

- Set up the groups if you define tests and enter test results by customer group or item group.
- Set up the hierarchy for preference profiles.

See *JD Edwards EnterpriseOne Advanced Pricing 8.12 Implementation Guide*, “Working with Schedules and Adjustments,” Setting Up a Preference Master.

- Set the processing option for the Quality Preference Revisions program (P40318) to activate workflow and use the approval process.
- Set the processing option for the Quality Preference Revisions program to log changes to preference profiles to create historical information.

## Forms Used to Set Up Preference Profiles

Form Name	FormID	Navigation	Usage
Preference Hierarchy Revisions	W40073D	<p>Quality Management Setup (G3741), Preference Master</p> <p>Locate preference type 18 on the Work With Preference Master form, and select Hierarchy from the row menu.</p> <p>Enter consecutive numbers at the intersections of rows and columns on Preference Hierarchy Revisions, and then click the OK button.</p>	Set up a quality preference master record.
Preference Hierarchy Revisions	W40073D	Select a preference on the Work with Preference Master form, and select Hierarchy from the Row menu.	Define the hierarchy of the preference.
Preference Hierarchy Selection	W40073F	<p>Quality Management Setup (G3741), Quality Preference Revisions</p> <p>Click the Add button on the Work With Quality Management Profile form.</p>	Select a preference hierarchy.
Quality Management Profile Revisions	W40318B	<p>Select a hierarchy on the Preference Hierarchy Selection form, and click the Select button.</p> <p>Select a record, and select Split Spec from the Row menu on the Quality Management Profile Revisions form.</p> <p>Review the separate tests for this specification.</p>	<p>Define preference profiles.</p> <p>You can override test definition values if necessary.</p> <p><b>Note.</b> 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.</p>

Page Name	Object Name	Navigation	Usage
Display Criteria Window	W40318D	Select a row on the Quality Management Profile Revisions form, and select Display Criteria from the Row menu.	<p>Customize display criteria. Selections that you make here control what appears on the Test Results Revisions form.</p> <p>If you don't want to perform quality testing for a particular program, verify that the corresponding option is clear.</p> <p>For example, to enter test results during work order inventory completions, verify that the Manufacturing Completions option is selected. This option activates the Test Results Revisions program (P3711) when you enter a work order completion.</p>
Quality Management Profile Revisions	W40318B	<p>Quality Management Setup (G3741), Quality Preference Revisions</p> <p>Select a specification on the Work With Quality Management Profile form, and click the Select button.</p>	Define the tests and specifications that make up the preference.

## Setting Processing Options for Preference Profile Quality Management (P40318)

Processing options enable you to specify the default processing for programs and reports.

### Default

This processing option controls which status a preference must have for the system to display it.

### Status

Specify a status value to filter quality management preferences. Values are:

Blank: Only active preferences will display.

1: Only preferences which are pending approval will display.

2: Only historical preference information will display.

3: Only rejected change requests will display. On the browse form, this filter can be changed to display all status values.

### Process

This processing option controls whether the systems stores history information for preferences.

**Log History**

Specify whether to activate logging on adds, changes, and deletions of quality preferences. When you activate logging, the system saves an image of the currently active quality preference before the new changes are applied. These before images are logged as history information, and they can be viewed online, or through reports by selecting the history status (status value is 2). Values are:

Blank: Do not activate.

I: Activate.

**Workflow**

This processing option controls whether workflow approval processing is activated when preferences are modified.

**Workflow**

Specify whether to activate workflow approval processing. When you activate workflow, any additions, changes or deletions to a quality preference must be approved before the revision is active and available for use. Values are:

Blank: Not activated; revisions are available for use immediately.

I: Activated; revisions must be approved before they are available for use.

**Setting Up a Quality Preference Master Record**

Access the Preference Hierarchy Revisions form.

**Defining Preference Profiles**

Access the Quality Management Profile Revisions form.

**Quality Preference Revisions - Quality Management Profile Revisions**

OK

Customer Number: 4244 *Creekside Warehouse* Branch/Plant: M30

Customer Group:

Item Number: 4100 *Sport Drink, Lime*

Item Group:

Records 1 - 3								
<input type="checkbox"/>	<input type="checkbox"/>	Sort Seq	T S	Test Specification	Branch Plant	Effective From	Effective Thru	Test Type
<input type="checkbox"/>		1	T	SC-01	M30	01/19/1999	12/31/2010	R
<input type="checkbox"/>		2	T	SD-05	M30	01/19/1999	12/31/2010	R
<input type="checkbox"/>		3						

Quality Management Profile Revisions form

Fields that appear in the header depend on the hierarchy that you select.

<b>Customer Number</b>	Enter a number that identifies an entry in the JD Edwards EnterpriseOne Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.
<b>Item Number</b>	Enter a number that the system assigns to an item. It can be in short, long, or third item number format.
<b>Sort Seq</b> (sort sequence)	Enter a number used to determine the sort order of tests and specifications within preference profiles (item/test specifications).
<b>T S</b> (test or specification)	Enter a code that indicates whether a record within preference profiles (item/test specifications) is a test or specification. Values are:  <i>T</i> (test): You can override testing and sampling information from the original test definition by competing the appropriate fields. If you override this information, the preference displays the override values. Otherwise, the preference displays the default values.  <i>S</i> : (specification)
<b>Test Specification</b>	Enter the unique identification for a test to be performed on an item. For example:  COL: color test DENS: density test CL-2: clarity test
<b>Test Type</b>	Enter a value that specifies how the system processes tests as you enter test results. Values are:  <i>R</i> (required): Result values must be within the allowable range for the test to pass. The system does not allow an item to pass quality inspection until you enter results for each required test.  <i>O</i> (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 enter failing results, the item fails quality inspection.  <i>G</i> (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.
<b>Result UM</b> (result unit of measure)	Enter a UDC (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.
<b>Display Dec</b> (display decimals)	Enter a value that designates the number of decimals in the currency, amount, or quantity fields the system displays.

## Customizing Display Criteria

Access the Display Criteria Window form.

<b>Manufacturing Operations</b>	Enter a value that specifies whether the system displays the test on the Test Results Revisions form when you access the Test Results Revisions program (P3711) from any of these Manufacturing programs:
---------------------------------	---

Coproduct and Byproduct Completion (P31115)

Super Backflush (P31123)

Work Order Time Entry (P311221)

If you enter *1* in the grid column or if this option is checked, the system displays the test on the Test Results Revisions form. 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.

### **Manufacturing Receipt Routing**

Enter a value that 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. Values are:

*1*: Appears.

*0*: Does not appear.

You can use this value with the operation sequence to control the appearance of the test at a route operation.

### **Manufacturing Completions**

Enter a value that specifies whether the system displays the test on the Test Results Revisions form when you access the Test Results Revisions program (P3711) from either of these Manufacturing programs:

Work Order Completions (P31114)

Completions Workbench (P3119)

If you enter *1* in the grid column or if this option is checked, the system displays the test on the Test Results Revisions form.

### **Purchasing Receipts**

Enter a value that 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). Values are:

*1*: Appears.

*0*: Does not appear.

### **Purchasing Receipt Routing**

Enter a value that 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. Values are:

*1*: Appears.

*0*: Does not appear.

You can use this value with the operation sequence to control the appearance of the test at an operation.

### **Ship Confirm**

Enter a value that controls whether the test will display on the Test Results Revisions form when you access test results from the Ship Confirmation (P4205) program. Values are:

*1*: Appears.

*0*: Does not appear.

### **Bulk Load Confirm**

Enter a value that controls whether the test will display on the Test Results Revisions form when you access test results from one of these programs:

Bulk Confirm by Order or Bulk Confirm by Trip (P49510)  
 Packaged Load Confirmation (P49530)

Values are:

*I*: Appears.

*0*: Does not appear.

### Type

Enter a UDC (40/TR) that indicates 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 system uses the specific type of routing that you define in the work order routing.

The JD Edwards EnterpriseOne Product Costing and JD Edwards EnterpriseOne Capacity Planning systems use only M type routings.

---

**Note.** If you enter a specification as part of a preference, you can set the display criteria for the entire specification. The display criteria that you set for the specification apply to all the tests that it contains.

---

## Splitting Specifications

Access the Quality Management Profile Revisions form.

---

## Working with Approval Processing

This section provides an overview of approval processing, lists prerequisites, and discusses how to:

- Revise tests, specifications, and preferences.
- Approve revisions.

### Understanding Approval Processing

When you need to approve changes to tests, specifications, and preferences, you can activate workflow approval processing and use the Approvals Workbench program (P37300) to route changes through an automated approval process.

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

- Test Revisions (P3701)
- Specification Revisions (P3702)
- Quality Preference Revisions (P40318)

The Approvals Workbench program 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. A designated approver reviews the changes and approves or rejects 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.

---

**Note.** Revision levels on specifications are for information only.

---

## Test, Specification, and Preference Revisions

You can revise tests, specifications, and preferences after they are set up. The steps for revising tests, specifications, and preferences are basically the same. Workflow processing determines when the changes take effect.

- 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 when no pending approvals are in progress.

If you activate logging, the system saves history records for all changes. You do not need to activate workflow in order to log history information.

You revise the test information as necessary on the Test Definition Revisions form, and click OK. When the workflow processing option is active, click OK to initiate the approval process.

## Approval or Rejection of Revisions

After you revise a test, specification, or preference, the system sends approval messages to the members of the distribution list. The steps for approving tests, specifications, and preferences are basically the same. The Quality Management Approvals program (P37300) can be used to approve or reject the revisions.

You can approve or reject multiple revision requests without having to access the approval form for each request. After it is approved or rejected, the revision requests no longer appear on the Approvals Workbench.

---

**Note.** You can also use the Employee Work Center in the JD Edwards EnterpriseOne Workflow Management system to approve or reject Quality Management revisions.

---

## Prerequisites

Before you can work with approval processing:

- Set up workflow processing.

See *JD Edwards EnterpriseOne 8.96 Workflow Tools Guide*

- Review the processing options for these programs to ensure that workflow processing is activated:
  - Test Revisions (P3701).
  - Specification Revisions (P3702).
  - Quality Preference Revisions (P40318).

- Set up distribution lists for approvers who change tests, specifications, and preferences in Workflow Management.
- Ask the system administrator to assign permissions to the Approver field in the Approvals Workbench program (P37300).

## Forms Used to Approve Changes

Form Name	FormID	Navigation	Usage
Test Definition Revisions	W3701A	Quality Management Setup (G3741), Test Revisions  Select a test on the Work With Test Definitions form, and click the Select button.	Revise tests, specifications, and preferences.
Quality Management Approvals Workbench	W37300C	Quality Management Setup (G3741), Approvals Workbench	Approve revisions.

## Revising Tests, Specifications, and Preferences

Access the Test Definition Revisions form.

**Test Revisions - Test Definition Revisions**

---

Test ID: 
 Branch/Plant:

Description: 
 Status:

Effective From:  Thru

---

Test Type	Display/Print	Sample Information
<input checked="" type="radio"/> Required	Display/Evaluate Test <input type="text" value="1"/>	Number of Samples <input type="text" value="2"/>
<input type="radio"/> Optional	Print Test <input type="text" value="1"/>	Sample Percentage <input type="text"/>
<input type="radio"/> Guaranteed	<input checked="" type="checkbox"/> Print Text	Sample Size <input type="text" value="1"/>
		Accept Quantity <input type="text" value="2"/>
		Accept Percentage <input type="text"/>
		Sample Size UOM <input type="text" value="BT"/>

Test Definition Revisions form

## Approving Revisions

Access the Quality Management Approvals Workbench form.

To approve a test revision request, review this additional information:

- Select the record and select View Request from the Row menu to view the details of a requested test revision.
- Select the record and then select View Original from the Row menu to view the original test definition.
- Select the appropriate test and select Approve from the Row menu to approve a test revision.

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

- Select the appropriate test and select Reject from the Row menu to reject a test revision.

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

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

---

## Reviewing Tests and Specifications

This section provides an overview of the Test/Specification Where Used program and discusses how to review tests and specifications.

### Understanding the Test/Specification Where Used Program

You can use the Test/Specification Where Used program (P37202) 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.

### Form Used to Review Tests and Specifications

Form Name	FormID	Navigation	Usage
Quality Management Profile Revisions	W40318B	<p>Quality Management Setup (G3741), Test/Specification Where Used</p> <p>Select a test or specification on the Test/Specification Where Used form, and select Preferences from the Row menu.</p> <p>Review or change the preference information on the Quality Management Profile Revisions form.</p> <p>Select a record, and then select an option from the Row menu to make other changes.</p> <p>Click OK.</p>	Review and revise tests and specifications.

## Reviewing Tests and Specifications

Access the Quality Management Profile Revisions form.

---

## Setting Up Inclusion Rules for Test Results Tracing

To trace test results, you must set up inclusion rules. Inclusion rules are UDC 37/DC and you must include the document type that you want to trace in the UDC. 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 reclassified.

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 work order completion document type in inclusion rules, the system stops tracing at the work order completion transaction.

Enter *UDC* in the Fast Path. Locate the UDC and click Add.

### Description 2

Add text that further describes or clarifies a field in the system.

Enter an *M* or *I* as the first letter of the description and the system will attempt to consolidate. Use this field in conjunction with WO Completion and WO Issues transactions.

---

## Setting Up Customer Billing Instructions for EnterpriseOne Quality Management

This section provides an overview of customer billing instructions, lists a prerequisite, and discusses how to:

- Select a customer for which to set up billing instructions.
- Set up customer billing instructions for EnterpriseOne Quality Management.

### Understanding Customer Billing Instructions

If you use the JD Edwards EnterpriseOne Sales Order Management system, you must use customer billing instructions to indicate whether customers should receive a certificate of analysis. You can set up the customer billing instructions to automatically generate a certificate of analysis for a particular customer when shipments are confirmed.

A certificate of analysis is a document that lists the tests and test results for item lots that you sold to a customer.

### Prerequisite

To control which tests print on the certificate of analysis, ensure that you have set up tests with the appropriate print test values.

## Forms Used to Set Up Customer Billing Instructions for EnterpriseOne Quality Management

Form Name	FormID	Navigation	Usage
Work With Customer Master	W03013A	Customer Revisions (G4221), Customer Billing Instructions	Select a customer for which to set up billing instructions.
Billing Information	W03013E	Select a customer on the Work With Customer Master form, and click the Select button.  Select Billing Information from the Form menu on the Customer Master Revision form.  Select the Certificate Of Analysis Print option on the Billing Page 1 tab on the Billing Information form.	Set up customer billing instructions for EnterpriseOne Quality Management.

### Selecting a Customer for Which to Set Up Billing Instructions

Access the Work With Customer Master form.

**Alpha Name** Enter the text that names or describes an address. This 40 character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

**Search Type** Enter a UDC (01/ST) that specifies the kind of address book record to search for. Values are:

*E*: Employees

*X*: Ex-employees

*V*: Suppliers

*C*: Customers

*P*: Prospects

*M*: Mail distribution lists

*TAX*: Tax authorities

### Setting Up Customer Billing Instructions for EnterpriseOne Quality Management

Access the Billing Information form.

**Certificate Of Analysis Print** Select to enable the printing of the Certificate of Analysis. Clear to prevent printing a Certificate of Analysis for a specific customer when a Certificate of Analysis report is run for a group of customers.

---

**Note.** This feature is only activated when the JD Edwards EnterpriseOne Quality Management system is in use and the Certificate of Analysis is created.

---



## CHAPTER 4

# Processing Test Results

This chapter provides an overview of test result processing and discusses how to:

- Select tests for results entry.
- Enter test results.
- Enter text for test results.
- Override test status.
- Create new samples.
- Review test results.
- Work with external test results.
- Review test results by lot number.
- Trace test results.
- Manage failed lots.
- Review tested lots by preference profile.

---

## Understanding Test Result Processing

This section discusses:

- Where to process test results.
- Test result processing.
- Test results entry format.
- Lot status.
- Sample numbering.
- System integration.

### Where to Process Test Results

After you set up the JD Edwards EnterpriseOne Quality Management system, you collect samples and perform quality tests at the points in the business cycle that you defined in a preference profile. You then enter and review the test results for an item. For example, a test result is a 0.20 percent syrup result for a sample of a soft drink that you are testing for syrup concentration.

You usually process test results from within the JD Edwards EnterpriseOne Quality Management system.

You can also access JD Edwards EnterpriseOne Quality Management programs to process test results from other systems when you perform these tasks:

- Enter a receipt for an item on a purchase order.
- Track the movement of a received item at any operation sequence during purchasing receipts routing.
- Track completions at operations during the manufacturing process.
- Complete the item after the manufacturing process and move it into stock.
- Confirm shipments.

Test processing information in the JD Edwards EnterpriseOne Quality Management system is accessible from these programs:

Quality Management Information	Programs
Shop Floor Management	Manufacturing Work Order Processing (R31410) Work Order Completions (P31114) Super Backflush (P31123) Work Order Time Entry (P311221)
Procurement	PO Receipts (P4312) Receipt Routing Movement and Disposition (P43250)
Sales Order Management	Shipment Confirmation (P4205)

## Test Result Processing

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 the 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 sets the lot status to the value that you defined in the processing option for failed lot status.

## Test Results Entry Format

You can enter test results in preference format, order number format, or compartment format. The format that you use depends on how you set the Results Entry Format processing option for the Enter Test Results program (P3711). The system uses header information to select tests and samples through preference profiles. The test results format that you use might depend on the activity that you are processing. Each format requires different information.

This table describes each format:

Format	Description
Preference format	You enter test results for a purchase order, work order, or sales order quantity. You can also enter test results for existing or newly created lots in inventory.
Order number format	You enter test results that are a part of an activity required to procure, manufacture, sell, or transport materials. When you use this format, you access the Enter Test Results program (P3711) through another program such as PO Receipts (P4312), Shipment Confirmation (P4205), or Work Order Completions (P31114).
Compartment number format	<p>You use this format only when you enter test results as part of a load confirmation within the JD Edwards EnterpriseOne Transportation Management system. You enter test results that must be entered for compartmentalized load during load confirm, according to the set up of the load type and quality preferences. You can set up test results for packaged or bulk items.</p> <p>See <i>JD Edwards EnterpriseOne Transportation Management 8.12 Implementation Guide</i>, “Planning Transportation,” Understanding Loads.</p> <p>See <i>JD Edwards EnterpriseOne Transportation Management 8.12 Implementation Guide</i>, “Planning Transportation,” Setting Processing Options for Transportation Load Confirmation (P49640).</p>

## Lot Status

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 customer specifications. When a lot passes quality inspection and meets the specifications, it is available for shipment to that customer.

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

- You can set processing options for failed and passed lot status, so that the system prevents the lots from being sold or shipped until the testing is finished and the lots pass inspection.
- You can set a processing option to hold the lot as soon as it is brought into inventory, regardless of whether it passed quality testing or has not yet been tested.

For example, you might use a lot status of Q to indicate that the lot quantity has not been tested. In a purchasing scenario, the lot status, along with a user-defined business process, prevents untested lots from being used by manufacturing. After you test the lot of purchased materials, you might change its status to F, to indicate that it failed inspection, or blank, to indicate that it passed inspection and is available. Alternatively, you might define a business process to indicate that another lot status represents material that can be used. You should be aware, however, that only blank lot statuses are considered available.

If you do not set processing options for failed and passed lot status, the system allows all lots to be sold or shipped. Any program that selects items from inventory can select the lots because the system considers them to be available.

The system allows free form entry of test results for tests that have these characteristics:

- Alphanumeric display format (the Numeric option on the Test Definition Revisions form is not selected).

- User-defined code list not set up.

For tests that are not set up with a user-defined code list, the lot passes when any value other than Blank appears in the test result.

## Sample Numbering

The JD Edwards EnterpriseOne 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 set up 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 retest the sample, 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 retest 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 JD Edwards EnterpriseOne Quality Management system assigns unique sample numbers only if they have not been provided by the inbound data.

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**Note.** 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.

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## System Integration

Depending on how you set up preference profiles, you can access the Test Results Revisions form (W3711B) from any of these programs:

- Work Order Completions (P31114).
- Work Order Time Entry (P311221).
- Completions Workbench (P3119).
- Shipment Confirmation (P4205).
- PO Receipts (P4312).
- Receipt Routing Movement and Disposition (P43250).

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

Program Functions	How to Use Test Results
Work Order Entry	When you create a work order, you can use Quality Preference Revisions (P40318) to maintain tests for the parent item.
Work Order Completions	When you enter work order completions, including quantity completed and quantity scrapped, you can: <ul style="list-style-type: none"> <li>• Access the Test Revisions program (P3701) for any parent work order items that require testing upon completion.</li> <li>• Review work order generic text.</li> <li>• Set processing options for default lot, work order, and operation status.</li> </ul>

Program Functions	How to Use Test Results
Super Backflush	<p>When you backflush labor and material for a work order, you can:</p> <ul style="list-style-type: none"> <li>• Access the Enter Test Results program (P3711) for any parent items that require testing.</li> <li>• Review generic text for the parent item and operations.</li> </ul> <p><b>Note.</b> The work order routing step is user-defined as a pay point where test results are to be entered.</p>
Work Order Time Entry	<p>When you charge actual hours and quantities to a work order, you can:</p> <ul style="list-style-type: none"> <li>• Access the Enter Test Results program for completed items that require testing.</li> <li>• Review generic text for the parent item.</li> <li>• Set processing options for work order status and operation status.</li> </ul> <p><b>Note.</b> Test results are entered against a specific routing step on the work order.</p>
Bill Revisions	<p>When you maintain bills of material, you can use the Quality Preference Revisions program to maintain tests for the parent item.</p>
PO Receipts	<p>When you receive items, you can access the Enter Test Results program for items that require testing.</p>
Receipt Routing	<p>When you review the location of goods within the receipts routing process and move them to another operation, you can access the Enter Test Results program for items that require testing.</p>
Sales Order Entry	<p>When you enter sales orders, you can use the Item Search program (P41200) to select the lot that meets the quality criteria for the customer and item that appear on the sales order.</p>

---

## Selecting Tests for Results Entry

This section provides an overview of where to enter test results, lists prerequisites, and discusses how to:

- Select tests in preference format.
- Choose tests in order number format.

## Understanding Where to Enter Test Results

You can enter test results for an item and lot from the JD Edwards EnterpriseOne Quality Management system menu or from many programs within the JD Edwards EnterpriseOne Manufacturing and Distribution systems. If you access the Enter Test Results program (P3711) from another Manufacturing or Distribution program, the system completes the test header information. The system uses the order header information and user-defined preference profiles to select the correct set of tests for results entry.

---

**Note.** When you add test results for the first time in order number format, you cannot use the Enter Test Results menu option. Instead, you must access the Test Results Revisions form from an order processing program such as PO Receipts (P4312), Shipment Confirmation (P4205), or Work Order Completions (P31114). This enables the system to select the appropriate tests from the preference profiles.

---

## Prerequisites

Before you can select tests for results entry, set these processing options for the Enter Test Results program (P3711):

- Results Entry Format.
- Activate System Sample Numbering.
- Test Results Search.
- Status for a Failed Lot.
- Status for a Passing Lot.
- For test results entry at manufacturing work order completions, ensure that the Manufacturing Completions option on the Display Criteria Window form (W40318D) is selected for at least one test in the preference profile.

Selecting this option ensures that the Enter Test Results after Completion option on the Work Order Completions Detail form is activated and that the system enables the Enter Test Results program when you enter a work order quantity.

## Forms Used to Select Tests for Results Entry

Form Name	FormID	Navigation	Usage
Work With Test Results	W3711A	Quality Management Daily Operations (G3711), Enter Test Results  Click the Find button and select a test on the Work With Test Results form.	Select tests in preference format.
Work Order Completion Detail	W31114B	Daily Order Reporting: Discrete (G3112), Full Completion  Click the Find button and select a work order on the Work With Work Order Completions form. Select Revisions from the Row menu.	Select tests in order number format.

## Selecting Tests in Preference Format

Access the Work With Test Results form.

## Choosing Tests in Order Number Format

Access the Work Order Completion Detail form.

**Full Completion - Work Order Completion Detail**

OK Cancel Form Tools

Order Number/Type/Desc: 518125 WVO Touring Bike, Red Branch/Plant: M30

Item Number: 220 Touring Bike, Red

Current Status: 10 Order Reviewed Reason Code:

Update Status: 10 Order Reviewed  Enter Test Results after Completion

**Quantity** Lot/Location

Date Completed: 10/26/2004 % Of Order Completed: 0.00

Date Last Completed:

	Transaction Qty	UOM	Secondary Qty	UOM
Qty Completed	<input type="text"/>	EA	<input type="text"/>	<input type="text"/>
Qty Scrapped	<input type="text"/>			
Qty Ordered	10.0000		<input type="text"/>	
Qty Completed To Date	<input type="text"/>		<input type="text"/>	
Qty Scrapped To Date	<input type="text"/>			

Work Order Completion Detail form

To select tests in order number format:

1. Enter a value in the Quantity Completed field.
2. Click the Lot/Location tab and enter or verify that there is a number in the Lot/Serial field.
3. Click OK.

The Test Results Revisions form appears. For lot controlled items, the lot number that the system generated for the order quantity appears disabled in the header.

## Entering Test Results

This section provides an overview of test results and discusses how to enter test results.

## Understanding Test Results

As you enter test results, the system processes them to determine whether the results that you collected pass the tests that you defined. The system compares the test results with minimum and maximum values. It then sets the value in the Pass/Fail field accordingly for each test, based on the value that you defined for the test using the Display/Evaluate Test field on the Test Definition Revisions form (W3701A).

The system evaluates each individual sample, and 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 retrieves the value in the Display/Evaluate Test field to determine how to evaluate that test.

These are values for the Display/Evaluate Test field:

Field Value	Description
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. For testing that occurs for government regulated materials, you might expect that all samples must pass certain minimum criteria.  You can use the optional Accept Quantity and Accept Percentage fields only when the value 1 appears in the Display/Evaluate Test field.
2	Average of All Samples. The system adds all sample results for the test and calculates an average. The average value must be within the minimum and maximum values that you defined for the test. Otherwise, the entire test fails. You might use this evaluation method for a manufacturing process in which a certain percentage of nonconforming materials is standard, such as circuit board production.
3	Last Occurrence. The system retrieves the last sample that you entered for the test and determines whether that sample passed. If so, the entire test passes. You might use this evaluation method for a manufacturing process in which ingredients are added to a mixture over time and quality sampling occurs in a similar fashion. If the last sample of the mixture is within tolerances, the product can be shipped.

The evaluation process uses the value that you enter in the Accept Quantity field on the Test Definition Revisions form as the number of samples that must pass a test. For example, suppose that you have four samples of the color test and you enter 2 in the Accept Quantity field. In this case, only two color samples must pass in order for color to pass quality inspection for a test.

The evaluation process uses the value that you enter in the Accept Percentage field on the Test Definition Revisions form as the percentage of samples that must pass within a test. For example, suppose that you have 10 samples of the color test and you enter 50 in the Accept Percentage field. In this case, only five color samples must pass in order for color to pass quality inspection for a test.

When all of the tests within a lot have a passing value, the system sets the lot status to the value that you entered in the Status for a Passing Lot processing option for the Enter Test Results program (P3711).

When 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 Status for a Failed Lot processing option for the Enter Test Results program. All failed test results appear highlighted on forms with test results, including the Test Results Revisions and all inquiry forms.

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

## Related Tasks

This table lists related tasks:

Task	Description
Evaluating tests during Bulk Load Confirm	The test type that you specify in the Test Revisions program (P3701) determines whether you enter test results during the Bulk Load Confirm process. If a test is required, the Bulk Load Confirm process stops until you enter passing test results. If a test is optional, a warning message appears, but you can complete the Bulk Load Confirm process. If a test is guaranteed, you can complete the Bulk Load Confirm process, and no warning message appears.
Creating nonconforming records	When you enter test results, you can also write failed tests to the F3703 table. Set the Record Nonconforming Product processing option on the Test Results tab for P3711. Use the Nonconforming Product program (P3703) to view these records.

## Prerequisites

Set the Number of Samples processing option for P3711 to enable the system to assign sample numbers or leave blank to enter a sample number for the test result in the Sample field.

Set the processing options on the Security tab for P3711 to ensure you can complete the Tester, Date Tested, and Time Tested fields. You can override the default values for the date and time.

## Form Used to Enter Test Results

Form Name	FormID	Navigation	Usage
Test Results Revisions	W3711B	<p>Quality Management Daily Operations (G3711), Enter Test Results</p> <p>Click the Find button and select a test on the Work With Test Results form.</p> <p>Complete the fields in the detail area for each test and click OK on Test Results Revisions.</p> <p>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.</p> <p>If the system displays warning messages because of failed or empty test results, click OK repeatedly until all messages are cleared. When you do not enter text results for required tests, the system views the results as failing results.</p>	<p>Enter test results</p> <p>The system evaluates each individual test and assigns a pass or fail code. The system updates the lot status as passing or failing, based on the processing options.</p>

## Entering Test Results

Access the Test Results Revisions form.

<b>Result Value</b>	Enter the result of the performed test.
<b>O (overridden)</b>	Enter the value which designates whether a test has been overridden. Values are: <i>1</i> : Overridden <i>0</i> : Not overridden
<b>Test ID(test identification)</b>	Enter the unique identification for a test performed on an item. For example: COL for Color test, DENS for Density Test, or CL-2 for Clarity Test.
<b>Test Description</b>	Enter brief information about the test.
<b>Sample</b>	Enter a number for a group of tests within the same sample.
<b>Root Cause</b>	Enter a UDC (37/RC) for the type of test.
<b>Defect Source</b>	Enter a UDC (37/SR) for the type defect.

<b>Oper Seq</b> (operation sequence)	A number used to indicate an order of succession.
<b>Work Center</b>	Enter a code that represents a high-level business unit. Use this code to refer to a branch or plant that might have departments or jobs, which represent lower-level business units, subordinate to it. For example, Dept. A or Job 123.

---

## 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 select the Print Text option on the Test Definition Revisions form, the system displays this text on the certificate of analysis.

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

---

## Overriding Test Status

This section provides an overview of test overrides and discusses how to override test status.

### Understanding Test Overrides

After you enter test results, you can override the pass or fail value of each individual test. If a lot fails, for example, because a test was faulty due to malfunctioning equipment or improper testing procedure, you might need to override a failing value to make the lot available for use.

If you override test results, these overridden test results appear on printed Certificates of Analysis as *on spec data*, that is, passing values. Thus, the customer does not know that the results were changed from their original status. The JD Edwards EnterpriseOne Quality Management system indicates results that were overridden because the system enters 1 in the O (test override) field in the Enter Test Results program (P3711) or Test Results Workbench program (P37203).

You should secure the override test results function to allow users to review the status and only individuals with the correct authority to change the status.

## Forms Used to Override Test Status

Form Name	FormID	Navigation	Usage
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results  Select a set of tests on the Work With Test Results form, and click the Select button.	Select a set of tests to override.
Test Status Revisions	W3711C	Quality Management Daily Operations (G3711), Enter Test Results  Locate and select a record on the Work With Test Results form. On the Test Results Revisions form, select a record and select Override Status from the Row menu.	Override a test status.
Media Objects	N/A	Select a row on the Test Results Revisions form, and select Attachments from the Row menu.	Enter a memo describing the status change.

### Overriding Test Status

Access the Test Status Revisions form.

To override test status:

1. Complete these fields, and click OK:

- Disposition Code
- Test Status

The system updates the value in the O (test override) field on the Test Results Revisions form.

2. Select Attachments from the Row menu on the Test Results Revisions form.

3. Enter a memo describing the reason for changing the status of the test and click Save on the Media Objects form.

**Test Status**                      Select P (passed) or F (failed).

---

## Creating New Samples

This section provides an overview of samples, lists a prerequisite, and discusses how to:

- Set processing options for Enter Test Results (P3711).
- Override the number of samples.
- Create additional samples for retesting.

## Understanding 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 for retesting.

If you are entering test results for the first time and you need to add more samples than you originally set up, you can override the number of samples defined for each test in the Quality Preference Revisions program (P4318) and the Test Revisions program (P3701). To do so, you must first set the processing option to display the Number of Samples field.

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**Note.** You can use this feature *only* when you are entering test results for the first time for a specific item or lot. If you are entering additional test results for retesting, use the New Sample option.

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

The New Sample option creates one new sample for *each* test within the preference. The New Sample option does not create a new sample based upon the number of samples information in related preferences.

You can also copy tests to create a new sample for a test.

## Prerequisite

Set the Number of Samples processing option on the Test Results tab of the Enter Test Results program (P3711) to display the Number of Samples field.

## Forms Used to Override the Number of Samples

Form Name	FormID	Navigation	Usage
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results.  Click the Add button on the Work With Test Results form.	Override the number of samples for first time tests.
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results  Select a set of test results and click the Select button on the Work With Test Results form.  Select New Sample from the Form menu.  The system creates one new sample for each test. If you need additional new samples, repeat this step.  You can also select Copy Test on the Row menu to create one new sample for one test.	Create additional samples for retesting.

## Setting Processing Options for Enter Test Results (P3711)

Processing options enable you to specify the default processing for programs and reports.

### Test Results

These processing options specify how the system formats, displays, and records test results:

- 1. Results Entry Format** Specify the format for entering test results. Values are:

  - Blank Use the Preference format.
  - 1: Use the Preference format, which organizes test results by branch/plant and customer number or item number.
  - 2: Use the Order number format, which organizes test results by work order, sales order, or purchase order numbers.
  - 3: Use the Compartment format, which organizes test results by load number and planning depot.
- 2. Default Tester** specify the default address book number for the tester. If you leave this processing option blank, you must manually enter the tester address book number for each test.

**3. Minimum and Maximum Parameters**

specify the range of acceptable values to measure quality. Values are:

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

*I*: 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.

**4. Number of Samples**

Specify whether to display the Number of Samples field on the Test Results Revisions form. Use that field to override the number of samples set up in the preference profile or the F3701 table. Values are:

Blank: Do not display.

*I*: Display.

**5. Copy Generic Text**

Specify whether the system copies information and instructions from tests or preferences to the test results. For example, generic text added through the Test Revisions program (P3701) or the Preference Profiles Inquiry by Customer/Item program (P40300) can list sampling methods for a specific or customized test. Values are:

Blank: Do not copy generic text.

*I*: Copy generic text added through the Test Revisions program.

2: Copy generic text added through the Preference Profiles Inquiry by Customer/Item program.

**6. Test Results Search**

Specify that the system search for a duplicate lot number before creating new test results. You prevent duplicate testing when the system searches for test results by lot number first instead of by document number only. If the search finds no duplicate lot number, new test results can be created. If you leave this processing option blank, the system uses the preference profile to create a new set of tests for a document number. Values are:

Blank: Do not search.

*I*: Search.

**7. Record Nonconforming Product**

Specify whether the system records items that have not passed quality testing. When a test fails, the system can assign a defect number and record the failure in the F3703 table. Review all failed lots and assign corrective actions. Values are:

Blank: Do not record.

*I*: Record.

**8. Activate System Sample Numbering**

Specify whether the system assigns sample numbers automatically when you enter test results. If you leave this processing option blank, you must manually enter a sample number for each test result. Values are:

Blank: Do not assign.

*I*: Assign.

**Security**

These processing options allow you to secure certain test information so that it cannot be altered:

- 1. Protect Date and Time** Specify whether to protect the date and time of tests. Values are:  
*I*: Protect.  
 Blank: Do not protect.
- 2. Protect Tester ID** Specify whether to protect the address book number of the tester. Values are:  
 Blank: Do not protect.  
*I*: Protect.

## Lot Status

These processing options control lot availability and lot status update.

- 1. Status for a Failed Lot** Specify the status code for lots that have failed quality testing. Lots with this status cannot be shipped or sold. If you leave this processing option blank, the system allows failed lots to be shipped or sold. Lot status codes are user-defined codes (41/L).
- 2. Status for a Passing Lot** Specify the status code for lots that have passed quality testing, but should not be available immediately to ship or sell. For example, a passing lot might be held if additional approvals are necessary. If you leave this processing option blank, the system allows passing lots to be shipped or sold.
- 3. Lot Status Update** Specify how the system updates the status of lots. Values are:  
 Blank: Update only the status for the lot master if additional testing or approvals are needed before updating the status of lots in inventory.  
*I*: Update the status for all lot locations. The status of a lot will be updated throughout inventory.  
 2: Display the Location Lot Status Change window to update the status for specific lot locations.

## Versions

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

- 1. Certificate of Analysis (R37900)** Specify which version of the Certificate of Analysis (COA) Extract program (R37900) to use for printing the tests and test results for lots sold to a customer. If you leave this processing option blank, the system uses version ZJDE0001.
- 2. Product Test Report (R37901)** Specify the version of the Product Test Report Extract program (R37901) to use for printing test results. You use the report to review test results for a work order, purchase order, or lot number. If you leave this processing option blank, the system uses version ZJDE0001.
- 3. Trace Test Results (P37201)** Specify which version of the Trace Test Results program (P37201) to use for reviewing the test results for an assembled item and its components or for an item that has been reclassified. If you leave this processing option blank, the system uses version ZJDE0001.
- 4. Test Revisions (P3701)** Specify the version of the Test Revisions program (P3701) you want to use. The version specifies the default status and whether the system uses workflow

and logs history records. If you leave this processing option blank, the system uses version ZJDE0001.

### 5. Exit to Preferences (P40318)

Specify the version of the Preference Profile Quality Management program (P40318) you want to use. You use this program to create profiles for designating groups of tests or specifications for any combination of customer, customer group, item (product), or item (product) group. If you leave this processing option blank, the system uses version ZJDE0001.

## Overriding the Number of Samples

Access the Test Results Revisions form.

To override the number of samples for first time tests:

1. Complete these fields:
  - Branch/Plant
  - Lot/SN
  - Item Number
2. Enter the number of samples that you need for the test in the Number of Samples field.
3. Complete these optional fields:
  - Location
  - Customer Number
4. Select Preference from the Form menu.
 

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

---

## 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:

- 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.

### See Also

*JD Edwards EnterpriseOne Sales Order Management 8.12 Implementation Guide*, “Processing Sales Orders,” Understanding Additional Order Processing During Ship Confirm

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## Working with External Test Results

You can load external test results from a laboratory information management system into the JD Edwards EnterpriseOne Quality Management system. After you have loaded external test results to a workfile F3711Z1, use the Batch Test Results program (R3711Z1I) to edit the test results by comparing them to existing test definitions, branch/plants, and results that have passed or failed. This program reads the workfile, edits the results, and writes records to the F3711 table.

The Batch Test Results program also prints either 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.

To access this program, select Quality Management Interoperability (G37311), Batch Test Results.

---

## Reviewing Test Results by Lot Number

This section provides an overview of test results by lot number and discusses how to:

- Review test results by lot number.
- Locate test results by item number and test ID.

### Understanding Test Results by Lot Number

As you work with lots in the JD Edwards EnterpriseOne Inventory Management and JD Edwards EnterpriseOne 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 (P37204) displays information depends on how you access it:

- When you access Test Results Inquiry from the JD Edwards EnterpriseOne Inventory Management system using the Lot Availability (P41280) or Lot Master Revision program (P4108), you see test results exactly as they were input.
- When you access Test Results Inquiry from the Sales Order Entry program (P4210) using the Item Search Returns Quantity program (P40ITM2), the system performs an online evaluation for the selected lot.

The system uses the customer number from the Sales Order Entry program to select tests using preference profiles. The system uses those tests to reevaluate 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 the Sales Order Entry program to select tests.

When you enter a sales order, you can:

- Use Test ID and test ranges to filter for items that meet the customer requirements on Selection Criteria Window.
- Locate items based on the Allowed Minimum or Allowed Maximum fields.
- Determine whether the lots that you review in the Item Search Returns Quantity program meet the customer or manufacturing specifications.
- Add lots to the sales order that meet the customer requirements.

- Access the Test Results Inquiry program from Item Search Returns Quantity program to view test results for an item, lot, and customer so that you can determine whether the lot meets customer specifications.

## Forms Used to Review Test Results by Lot Number

Form Name	FormID	Navigation	Usage
Test Results Inquiry	W37204B	Lot Control (G4113), Lot Availability  Select an item on the Work With Lot Availability form, and select Test Results from the Row menu.	Review test results by lot number.
Tested Lot Search	W37200A	Quality Management Daily Operations (G3711), Tested Lot Search.	Find the items in inventory that meet specific test ranges.

## Reviewing Test Results by Lot Number

Access the Test Results Inquiry form

**Lot Availability - Test Results Inquiry**

Find  Close  Row  Tools

Lot/SN  Branch/Plant

Location

Item Number  *Sport Drink, Lime*

Customer Number

Order Number

---

**Records 1 - 8**

Test Ovr	Dsp Cde	Ovrr User	Product Code	Us Cd	Sample Size	Sample UOM	Test Type	Oper Seq#
0						1 LT	R	1.00
0						1 LT	R	1.00

Test Results Inquiry form

**Test Ovr** (test overridden) Displays 1 to designates a test is overridden or 0 to designates a test is not overridden.

## Locating Test Results by Item Number and Test ID

Access the Tested Lot Search form

**Tested Lot Search - Tested Lot Search**

Find  Close  Tools

Branch/Plant

Item Number  Concentrate, Sport Drink

TestID

From Value  Thru

From Date  Thru

**Test Controls**

Mean

Standard Deviation

**Records 1 - 8**

	Result Value	0	Lot Serial Number	Location	Lot Status	Status Description
<input checked="" type="radio"/>	.81	0	199810010001	..		Add Lot Status Codes I
<input type="radio"/>	.80	0	199810010001	..		Add Lot Status Codes I
<input type="radio"/>	.81	0	199810010001	..		Add Lot Status Codes I

Test Results: Tested Lot Search form

**Lot Status**

Enter 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.

**Expiration Date**

Enter 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 select how the system commits inventory for an item on Item Master Information or Item Branch/Plant Information.

**Quantity Available**

Enter a number that indicates the quantity that is available.

For example, the available quantity might consist of the on hand quantity minus commitments, reservations, and backorders.

Availability is user-defined. You can set up availability in the Branch/Plant Constants program (P41001).

---

## Tracing Test Results

This section provides an overview of the Trace Test Results program (P37201) and discusses how to trace test results.

### Understanding the Trace Test Results Program

Use the Trace Test Results program (P37201) to find test results for components of an assembled item or for an item that has been reclassified. You can review the history of a lot that was purchased, consumed in production, and, finally, sold as part of a parent product.

You use this program to trace test results for lot controlled items.

### Form Used to Trace Test Results

Form Name	FormID	Navigation	Usage
Work With Trace Test Results	W37201D	<p>Quality Management Daily Operations (G3711), Trace Test Results</p> <p>To locate a specific item and lot, enter a number in the Lot/SN and Branch/Plant fields on the Work with Trace Results form and then click Find.</p> <p>Select Multi Level from the View menu on the Work with Trace Results form to review lots associated at lower levels.</p>	Trace test results.

### Tracing Test Results

Access the Work With Trace Test Results form.

---

## Managing Failed Lots

This section lists a prerequisite and discusses how to manage failed lots.

### Understanding How to Manage Failed Lots

For items that have not passed test evaluation in the Enter Test Results program (P3711), use the Nonconforming Product program (P3703) to review all failed lots and assign a corrective action.

### Prerequisite

Set the processing option for the Enter Test Results program (P3711) to write failed tests to the F3703 table.

## Form Used to Manage Failed Lots

Form Name	FormID	Navigation	Usage
Nonconforming Test Results Revisions	W3703C	Quality Management Daily Operations (G3711), Nonconforming Product  Select a record on the Work With Nonconforming Test Results form, and click the Select button.	Review all failed lots and assign a corrective action.

## Managing Failed Lots

Access the Nonconforming Test Result Revisions form.

Nonconforming Test Result Revisions form

**Corrective Action** Enter a user-defined code (37/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** Enter a number that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on.

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**Note.** These fields do not generate rework orders. You use them to document any corrective action to be taken and to reference the associated work order which must exist in the F4801 table.

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## Reviewing Tested Lots by Preference Profile

This section provides an overview of the Test Results Workbench program (P37203) and discusses how to review tested lots by preference profile.

### Understanding the Test Results Workbench Program

With the Test Results Workbench program, you can review test results for all lots that you tested using a particular preference profile. For example, when customers report an issue with the taste of a beverage, a customer service representative might use the Test Results Workbench program to review beverage lot numbers and the tests that were run on the lot.

To review test results, you first enter the preference information in the header area. The system select a test or group of tests according to this preference profile and locates all corresponding lots that have test results. Further filter the results by entering information in the header, such as a lot number, order number, or transportation load number.

### Forms Used to Review Tested Lots by Preference Profile

Form Name	FormID	Navigation	Usage
Test Results Workbench	W37203B	Quality Management Daily Operations (G3711), Test Results Workbench  Enter values in the Branch/Plant and Item Number fields and click Find on the Test Results Workbench form.	Review test results for all lots that you tested.
Test Results Workbench Detail	W37203C	Select a test and then select Result Detail from the Form menu on the Test Results Workbench form.	Review test results.  Filter the test results that you want to review to narrow the focus.  Enter more information to narrow the search by using the fields on the Preference, Lot, and Document tabs.

### Reviewing Tested Lots by Preference Profile

Access the Test Results Workbench Detail form.

**Test Results Workbench - Test Results Workbench Detail** i ?

Find  Cancel  Row  Tools

Preference **Lot** Document

Item Number  *Concentrate, Sport Drink*

Customer Number

Sample Number  Thru

Records 1 - 26 Customize Grid

<input type="checkbox"/>	Lot Serial Number	Lot Stat Code	Location	Test ID	Result Value	Allowed Minimum	Preferred Minimum
<input type="checkbox"/>	199810010001		..	SC-01	.81	.80	.80
<input type="checkbox"/>	199810010001		..	SC-01	.80	.80	.80
<input type="checkbox"/>	199810010001		..	SC-01	.81	.80	.80
<input type="checkbox"/>	199810010001		..	SC-01	.79	.80	.80
<input type="checkbox"/>	199810010002	Q	..	SC-01	.85	.80	.80
<input type="checkbox"/>	199810010002	Q	..	SC-01	.86	.80	.80
<input type="checkbox"/>	199810010002	Q	..	SC-01	.84	.80	.80
<input type="checkbox"/>	199810010002	Q	..	SC-01	.84	.80	.80
<input type="checkbox"/>	199810010001		..	SC-02	C04	C02	C02
<input type="checkbox"/>	199810010001		..	SC-02	C04	C02	C02
<input type="checkbox"/>	199810010001		..	SC-02	C04	C02	C02
<input type="checkbox"/>	199810010001		..	SC-02	C03	C02	C02
<input type="checkbox"/>	199810010002	Q	..	SC-02	C03	C02	C02
<input type="checkbox"/>	199810010002	Q	..	SC-02	C03	C02	C02
<input type="checkbox"/>	199810010002	Q	..	SC-02	C02	C02	C02
<input type="checkbox"/>	199810010002	Q	..	SC-02	C03	C02	C02
<input type="checkbox"/>	199810010001		..	SC-03	.26	.23	.23

Test Results Workbench Detail form

# APPENDIX A

## Delivered Workflow for EnterpriseOne Quality Management

This appendix provides an overview of the delivered workflow for JD Edwards EnterpriseOne Quality Management.

### See Also

*JD Edwards EnterpriseOne 8.96 Workflow Tools Guide*

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## Delivered Workflow for EnterpriseOne Quality Management

This section provides an overview and discusses the JD Edwards EnterpriseOne Quality Management workflow.

### Test Definitions Approval

This section discusses the Test Definitions Approval workflow.

#### Description

<b>Workflow Description</b>	The system sends a workflow message to a specified approver when you enter or change a test definitions. The test remains at a status of P (pending) and cannot be used until the approver changes the test status to A (Approved).
<b>Workflow Trigger</b>	When workflow is turned on in the processing options and a test definition changes or is entered.
<b>Workflow Action</b>	The approver receives a message in the workcenter to approve the test definition. When the approver selects the message in the workcenter, the system displays the Quality Management Approvals Workbench, where the approver can review the test definition and select Approve from the Row menu to approve the test.

## Workflow Objects

<b>System</b>	37
<b>Workflow Object Name</b>	JDEQMAPRV1
<b>Object ID</b>	N3700070
<b>Event Description / Function Name</b>	F3701ProcessTestMasterData
<b>Sequence / Line Numbers</b>	572, 603, 703

## Specification Definitions Approval

This section provides an overview and discusses the Specification Definitions Approval workflow.

### Description

<b>Workflow Description</b>	The system sends a workflow message to a specified approver when a they enter or change a specification definition. The specification remains at a status of P (Pending) and the specification cannot be used until the approver changes the specification status to A (Approved).
<b>Workflow Trigger</b>	When workflow is turned on in the processing options and entered or changed in a specification definition.
<b>Workflow Action</b>	The approver receives a message in the work center to approve the specification definition. When the approver selects the message in the work center, the system displays the Quality Management Approvals Workbench, where the approver can review the specification definition and select Approve from the Row menu to approve the specification.

## Workflow Objects

<b>System</b>	37
<b>Workflow Object Name</b>	JDEQMAPRV2
<b>Object ID</b>	N3700100
<b>Event Description / Function Name</b>	F3702ProcessSpecDefinitionMast
<b>Sequence / Line Numbers</b>	216, 250, 298

## Quality Preference Approval

This section provides an overview and discusses the Quality Preference Approval workflow.

## Description

<b>Workflow Description</b>	The system sends a workflow message to a specified approver when they enter or change a quality preference. The preference remains at a status of P (Pending) and the preference cannot be used until the approver changes the preference status to A (Approved).
<b>Workflow Trigger</b>	When workflow is turned on in the processing options and is entered or changes a quality preference.
<b>Workflow Action</b>	The approver receives a message in the work center to approve the quality preference. When the approver selects the message in the workcenter, the system displays the Quality Management Approvals Workbench, where the approver can review the preference and select Approve from the Row menu to approve the preference.

## Workflow Objects

<b>System</b>	37
<b>Workflow Object Name</b>	JDEQMAPRV3
<b>Object ID</b>	N3700340
<b>Event Description / Function Name</b>	F40318UpdateQualityPreferences
<b>Sequence / Line Number</b>	53



## APPENDIX B

# EnterpriseOne Quality Management Reports

This appendix provides an overview of EnterpriseOne Quality Management reports and enables you to:

- View a summary table of all reports.
- View details for selected reports.

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## EnterpriseOne Quality Management Reports

The JD Edwards EnterpriseOne Quality Management system provides a variety of reports that contain information about user-defined tests, specifications, and preferences, as well as the results of quality testing. The reports in this appendix fall into these two categories:

- Setup reports
- Test results reports

Use setup reports to review information about user-defined tests, specifications, and preferences. Setup reports include:

- Test Definition Report (R37410)
- Specifications Report (R37415)
- Item Test Specifications Report (R37420)

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

- Test Results Worksheet report (R37470)
- Certificate of Analysis Extract (R37900)
- Product Test Report (R37901)

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## EnterpriseOne Quality Management Reports: A to Z

This table lists the EnterpriseOne Quality Management reports, sorted alphanumerically by report ID:

Report ID and Report Name	Description	Navigation
R37410 Test Definition Report	Tests for a branch/plant.	Quality Management Setup (G3741), Test Definition Report
R37415 Specifications Report	Test specifications for a branch/plant.	Quality Management Setup (G3741), Specifications Report
R37420 Item Test Specifications (Sometimes referred to as the Preference Report)	Test specifications by customer, customer group, item, or item group for the branch/plant.	Quality Management Setup (G3741), Item Test Specifications  Access the Item Test Specifications form.
R37470 Test Results Worksheet report (Sometimes referred to as the Manufacturing Specifications report)	Generates a test results worksheet that production personnel can use to track quality testing values that they will enter into the system at a later time.	The system generates the Test Results Worksheet report (R37470) automatically when you run the Order Processing program (R31410) for manufacturing work orders.
R37900 Certificate of Analysis: Extract	Prints a certificate of analysis, which lists all of the tests performed and the test results for lots sold to a customer. You print a certificate of analysis when a customer requires additional reporting.	Quality Management Daily Operations (G3711), Certificate of Analysis Extract
R37901 Product Test Report	Reviews all test results for a work order, purchase order, or lot number that you select. Use this information to review quality information for the orders.	Quality Management Daily Operations (G3711), Product Test Report

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## EnterpriseOne Quality Management Reports: Selected Reports

This section provides detailed information, including processing options, for individual reports. The reports are listed alphanumerically by report ID.

### R37410 - Test Definition 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 the products.

### Processing Options for the Test Definition Report (R37410)

These processing options control default processing for the Test Definition report.

## Default

### 1. Enter the test status for selecting test definitions

Specify user-defined code (00/WS) that indicates the approval status. Values are:

Blank: Active/Approved

1: Pending

2: History

3: Rejected

### 2. Enter the As of Date for selecting test revisions

Specify a date that indicates:

- When a component part is no longer in effect on a bill of material.
- When a routing step is no longer in effect as a sequence on the routing for an item.
- When a rate schedule is no longer active The default is December 31 of the default year defined in the Data Dictionary for Century Change Year.

You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in the JD Edwards EnterpriseOne Product Costing, JD Edwards EnterpriseOne Shop Floor Management, and JD Edwards EnterpriseOne Capacity Requirements Planning systems. The JD Edwards EnterpriseOne Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.

## R37415 – 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 the business.

### Processing Options for the Specifications Report (R37415)

These processing options control default processing for the Specifications report.

#### Defaults

### 1. Enter the specification status for selecting specification definitions

Specify a user-defined code (00/WS) that indicates the approval status. Values are:

Blank: Active/Approved

1: Pending

2: History

3: Rejected

### 2. Enter As of Date

A date that indicates:

- When a component part is no longer in effect on a bill of material.
- When a routing step is no longer in effect as a sequence on the routing for an item.

- When a rate schedule is no longer active The default is December 31 of the default year defined in the Data Dictionary for Century Change Year.

You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in the JD Edwards EnterpriseOne Product Costing, JD Edwards EnterpriseOne Shop Floor Management, and JD Edwards EnterpriseOne Capacity Requirements Planning systems. The JD Edwards EnterpriseOne Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.

## R37420 – Item Test Specifications

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 the business.

### Processing Options for Item Test Specifications (R37420)

These processing options control default processing for the Item Test Specifications report.

#### Print

**Print** Enter *I* to print all the tests included in a particular specification. If left blank only the specification will print on the report.

#### Defaults

##### 1. Enter the test/specification status for selecting test/specification definitions

Specify a user-defined code (00/WS) that indicates the approval status. Values are:

Blank: Active/Approved

*I*: Pending

2: History

3: Rejected

##### 2. Enter the As of Date for selecting test/specification definitions

A date that indicates:

- When a component part is no longer in effect on a bill of material.
- When a routing step is no longer in effect as a sequence on the routing for an item.
- When a rate schedule is no longer active The default is December 31 of the default year defined in the Data Dictionary for Century Change Year.

You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in the JD Edwards EnterpriseOne Product Costing, JD Edwards EnterpriseOne Shop Floor Management, and JD Edwards EnterpriseOne Capacity Requirements Planning systems. The JD Edwards EnterpriseOne Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.

## R37470 - Test Results Worksheet Report

The report provides the minimum and maximum values for the work order that is to be sampled. The preference for the minimum and maximum values can be based on the work order or the customer. To use customer testing requirements, the work order header must contain the related customer address book number. The system automatically updates the customer address book number when a work order is created from a sales order with line type W (work order), or you can enter it manually on the work order header.

### Processing Options for the Test Results Worksheet (R37470)

These processing options control default processing for the Test Results Worksheet report.

#### Print

**Print** Enter *1* to print the Preferred Minimum and Maximum. If left blank the Allowed Minimum and Maximum will print.

#### Preference

**Preference** 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

**Text** Specify whether to Print Generic Text. Values are:  
 Blank: Text will not print.  
*1*: Print Generic Text from Test Revisions (P3701).  
*2*: Print Generic Text form Preference Profiles (P40300).

## R37900 - Certificate of Analysis Extract Report

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 multilevel test results for each lot that it locates. The system prints all test results for each lot.

The system can print the certificate of analysis in multiple languages, depending on how you set the appropriate processing option.

---

**Note.** You can set processing options in the Shipment Confirmation program (P4205) to print the certificate of analysis automatically.

---

#### Prerequisites

Before printing the Certificate of Analysis Extract report:

- Determine which tests and generic text to print on the certificate of analysis.
- Determine which customers should receive a certificate of analysis.
- Determine the type of transaction records to use for tracing lots.

## Processing Options for the Certificate of Analysis Extract (R37900)

These processing options control default processing for the Certificate of Analysis Extract report.

### Defaults

These processing options control the address that appears on the certificate of analysis, as well as the override 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 (40/AT).

- 1. Address Type** Specify which address to print on the Certificate of Analysis. Values are:  
Blank: Ship to address  
*1*: Ship to address.  
2: Sold to address.  
3: Parent address.
- 2. Next Status** Specify whether to override the Next Status code if you need to indicate on a sales order that you printed a Certificate of Analysis.  
Enter a value from the user-defined table to override the Next Status code.  
If you leave this processing option blank (default), the Next Status code is not overridden.

### Extract

This processing option controls whether you can reprint certificates of analysis without rerunning the Certificates of Analysis Extract report.

- Extract Table** Specify whether 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. Values are:
- Blank: Clear the Certificate of Analysis extract table each time the report is run.
- 1*: Do not clear the Certificate of Analysis extract table (save history information), to allow reprints.

### Trace

This processing option controls whether you trace test results.

- Trace** Specify to control whether the system traces 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 reclassified. Values are:
- Blank: Do not trace test results.
- 1*: Trace single level test results by lot.
- 2: Trace multilevel test results by lot.

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

## Preference

This processing option controls whether the system uses preference profiles to print test results on the certificate of analysis.

### Preference

Specify to control whether the system uses preference profiles to print test results on the Certificate of Analysis. Values are:

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

**I:** Use preference profiles to print test results on the Certificate of Analysis. The system reevaluates test results for Pass/Fail codes based on the minimum and maximum values in preference profiles.

## Print

These processing options control the version of the Certificate of Analysis Extract report to print and the ability to reprint certificates of analysis without rerunning the report. Versions control how programs display information.

### 1. Certificate of Analysis (R37460)

Specify whether 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 you leave this processing option blank, the program uses the ZJDE0001 version.

### 2. User-Defined Program

Specify whether to print a Certificate of Analysis that you have designed, instead of using R37460.

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

### 3. User-Defined Version

Specify the version of the 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 the customized certificate to print.

### 4. Language to Print

Specify the language in which to print the Certificate of Analysis. Values are:

**Blank:** Default language.

**I:** Customer preferred language.

## R37901 - Product Test Report

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 multilevel test results for each lot that it locates. The system prints all test results for each lot.

## Processing Options for Product Test Report (R37901)

These processing options control default processing for the Product Test report.

### Extract

This processing option controls whether you can reprint certificates of analysis without rerunning the Certificate of Analysis Extract report (R37900).

#### Retain Extracted Information

Specify whether to retain information that the system extracts from the F37900 table so that you can reprint reports without having to rerun them. For example, you might need to reprint a Product Test report that was lost in the mail for a customer who requires the report to accept the product. Values are:

Blank: Do not retain. The system clears the extract table each time a report is run.

*/* Retain. The system does not clear the extract table each time a report is run.

### Trace

This processing option controls whether you trace test results.

#### Trace Test Results

Specify the level of tracing for the test results for lots. This processing option traces test results for an assembled item, the components of the assembled item, or a reclassified item. Values are:

Blank: The system does not trace test results.

*1*: The system performs a single level trace.

*2*: The system performs a multi level trace.

If you do not trace test results, you must enter test results for sales orders at the ship confirm status to generate a product test report.

### Print

You use this processing option to provide a name and version, if you want to run a customized report.

**User-defined Report and 2. User-defined Version** Specify the name of the customized report that you want to print. If you leave this processing option blank, the system prints the standard Product Test Report (R37450).

### Version

This processing option indicates the version that you run for the report.

**Product Test Report (R37450)** Specify the version of the Product Test report (R37450). If you leave this processing option blank, the system uses version ZJDE0001.

# Glossary of JD Edwards EnterpriseOne Terms

<b>activity</b>	A scheduling entity in JD Edwards EnterpriseOne tools that represents a designated amount of time on a calendar.
<b>activity rule</b>	The criteria by which an object progresses from one given point to the next in a flow.
<b>add mode</b>	A condition of a form that enables users to input data.
<b>Advanced Planning Agent (APAg)</b>	A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of relational databases, flat file format, and other data or message encoding, such as XML.
<b>application server</b>	A server in a local area network that contains applications shared by network clients.
<b>as if processing</b>	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
<b>alternate currency</b>	<p>A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.</p> <p>In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.</p>
<b>as of processing</b>	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
<b>back-to-back process</b>	A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.
<b>batch processing</b>	<p>A process of transferring records from a third-party system to JD Edwards EnterpriseOne.</p> <p>In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.</p>
<b>batch server</b>	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
<b>batch-of-one immediate</b>	<p>A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.</p> <p>See also direct connect and store-and-forward.</p>
<b>business function</b>	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules,

and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.

<b>business function event rule</b>	See named event rule (NER).
<b>business view</b>	A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
<b>central objects merge</b>	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
<b>central server</b>	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
<b>charts</b>	Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.
<b>connector</b>	Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.
<b>contra/clearing account</b>	A general ledger account in JD Edwards EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in JD Edwards EnterpriseOne Financial Management.
<b>Control Table Workbench</b>	An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
<b>control tables merge</b>	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
<b>cost assignment</b>	The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
<b>cost component</b>	In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).
<b>cross segment edit</b>	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.
<b>currency restatement</b>	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
<b>database server</b>	A server in a local area network that maintains a database and performs searches for client computers.
<b>Data Source Workbench</b>	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.

<b>date pattern</b>	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
<b>denominated-in currency</b>	The company currency in which financial reports are based.
<b>deployment server</b>	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
<b>detail information</b>	Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
<b>direct connect</b>	A transaction method in which a client application communicates interactively and directly with a server application.  See also batch-of-one immediate and store-and-forward.
<b>Do Not Translate (DNT)</b>	A type of data source that must exist on the iSeries because of BLOB restrictions.
<b>dual pricing</b>	The process of providing prices for goods and services in two currencies.
<b>edit code</b>	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
<b>edit mode</b>	A condition of a form that enables users to change data.
<b>edit rule</b>	A method used for formatting and validating user entries against a predefined rule or set of rules.
<b>Electronic Data Interchange (EDI)</b>	An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
<b>embedded event rule</b>	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
<b>Employee Work Center</b>	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
<b>enterprise server</b>	A server that contains the database and the logic for JD Edwards EnterpriseOne.
<b>EnterpriseOne object</b>	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
<b>EnterpriseOne process</b>	A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
<b>Environment Workbench</b>	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the system-release number data source. It also updates the Environment Plan detail record to reflect completion.
<b>escalation monitor</b>	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

<b>event rule</b>	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
<b>facility</b>	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. A facility is sometimes referred to as a “business unit.”
<b>fast path</b>	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
<b>file server</b>	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.
<b>final mode</b>	The report processing mode of a processing mode of a program that updates or creates data records.
<b>FTP server</b>	A server that responds to requests for files via file transfer protocol.
<b>header information</b>	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.
<b>interface table</b>	See Z table.
<b>integration server</b>	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
<b>integrity test</b>	A process used to supplement a company’s internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
<b>interoperability model</b>	A method for third-party systems to connect to or access JD Edwards EnterpriseOne.
<b>in-your-face-error</b>	In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
<b>IServer service</b>	This internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
<b>jargon</b>	An alternative data dictionary item description that JD Edwards EnterpriseOne appears based on the product code of the current object.
<b>Java application server</b>	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
<b>JDBNET</b>	A database driver that enables heterogeneous servers to access each other’s data.
<b>JDEBASE Database Middleware</b>	A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
<b>JDECallObject</b>	An API used by business functions to invoke other business functions.
<b>jde.ini</b>	A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.
<b>JDEIPC</b>	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

<b>jde.log</b>	The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.
<b>JDENET</b>	A JD Edwards EnterpriseOne proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all JD Edwards EnterpriseOne supported platforms.
<b>Location Workbench</b>	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the system data source.
<b>logic server</b>	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.
<b>MailMerge Workbench</b>	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
<b>master business function (MBF)</b>	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
<b>master table</b>	See published table.
<b>matching document</b>	A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
<b>media storage object</b>	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
<b>message center</b>	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.
<b>messaging adapter</b>	An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.
<b>messaging server</b>	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
<b>named event rule (NER)</b>	Encapsulated, reusable business logic created using event rules, rather than C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
<b><i>nota fiscal</i></b>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<b><i>nota fiscal factura</i></b>	In Brazil, a nota fiscal with invoice information. See also <i>nota fiscal</i> .

<b>Object Configuration Manager (OCM)</b>	In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
<b>Object Librarian</b>	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
<b>Object Librarian merge</b>	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
<b>Open Data Access (ODA)</b>	An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.
<b>Output Stream Access (OSA)</b>	An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
<b>package</b>	JD Edwards EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.
<b>package build</b>	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.  Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”
<b>package location</b>	The directory structure location for the package and its set of replicated objects. This is usually <code>\\deployment server\release\path_code\package\package name</code> . The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
<b>Package Workbench</b>	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the system-release number data source. It also updates the Package Plan detail record to reflect completion.
<b>planning family</b>	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
<b>preference profile</b>	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
<b>print server</b>	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
<b>pristine environment</b>	A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

<b>processing option</b>	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
<b>production environment</b>	A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.
<b>production-grade file server</b>	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
<b>program temporary fix (PTF)</b>	A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.
<b>project</b>	In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
<b>promotion path</b>	<p>The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):</p> <p>11&gt;21&gt;26&gt;28&gt;38&gt;01</p> <p>In this path, <i>11</i> equals new project pending review, <i>21</i> equals programming, <i>26</i> equals QA test/review, <i>28</i> equals QA test/review complete, <i>38</i> equals in production, <i>01</i> equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.</p>
<b>proxy server</b>	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
<b>published table</b>	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
<b>publisher</b>	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
<b>pull replication</b>	One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
<b>QBE</b>	An abbreviation for query by example. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
<b>real-time event</b>	A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when certain transactions occur.
<b>refresh</b>	A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
<b>replication server</b>	A server that is responsible for replicating central objects to client machines.
<b>quote order</b>	In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
<b>selection</b>	Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
<b>Server Workbench</b>	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number data source. It also updates the Server Plan detail record to reflect completion.
<b>spot rate</b>	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
<b>Specification merge</b>	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
<b>specification</b>	A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
<b>Specification Table Merge Workbench</b>	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
<b>store-and-forward</b>	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
<b>subscriber table</b>	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
<b>supplemental data</b>	<p>Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.</p> <p>For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.</p>
<b>table access management (TAM)</b>	The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
<b>Table Conversion Workbench</b>	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
<b>table conversion</b>	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
<b>table event rules</b>	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
<b>terminal server</b>	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

<b>three-tier processing</b>	The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.
<b>three-way voucher match</b>	In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
<b>transaction processing (TP) monitor</b>	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
<b>transaction set</b>	An electronic business transaction (electronic data interchange standard document) made up of segments.
<b>trigger</b>	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
<b>triggering event</b>	A specific workflow event that requires special action or has defined consequences or resulting actions.
<b>two-way voucher match</b>	In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
<b>User Overrides merge</b>	Adds new user override records into a customer's user override table.
<b>variance</b>	In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.  In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, 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.
<b>Version List merge</b>	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
<b>visual assist</b>	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
<b>vocabulary override</b>	An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.
<b>wchar_t</b>	An internal type of a wide character. It is used for writing portable programs for international markets.
<b>web application server</b>	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
<b>web server</b>	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
<b>Windows terminal server</b>	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows

terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

<b>workbench</b>	A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.
<b>work day calendar</b>	In JD Edwards EnterpriseOne Manufacturing, a calendar that is 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. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
<b>workflow</b>	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
<b>workgroup server</b>	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
<b>XAPI events</b>	A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.
<b>XML CallObject</b>	An interoperability capability that enables you to call business functions.
<b>XML Dispatch</b>	An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.
<b>XML List</b>	An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.
<b>XML Service</b>	An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.
<b>XML Transaction</b>	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.
<b>XML Transaction Service (XTS)</b>	Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.
<b>Z event</b>	A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.
<b>Z table</b>	A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.
<b>Z transaction</b>	Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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