PeopleSoft®

PeopleSoft EnterpriseOne Quality Management 8.11 PeopleBook

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PeopleSoft EnterpriseOne Quality Management 8.11 PeopleBook
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Contents

About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page 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 elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

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

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, 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 PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft 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 PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 PeopleBooks. They provide the starting points for fundamental implementation tasks.

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 the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

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

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease 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

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 PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	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.
Italics	Indicates field values, emphasis, and PeopleSoft 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 *O*.
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

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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.

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

PeopleBooks 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 PeopleBooks:

- 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 PeopleBooks:

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

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

Common Elements Used in PeopleBooks

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.

As If Currency Code Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows 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.

Batch Number 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).

Batch Date 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.

Batch Status Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: 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 E.

U: 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.

Branch/Plant 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.

Business Unit 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.

Category Code 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.

Company 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.

Currency Code Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company 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. PeopleSoft 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.

PeopleSoft EnterpriseOne Quality Management Preface

This preface discusses:

- PeopleSoft products
- PeopleSoft application fundamentals
- Common elements used in this PeopleBook

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

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

PeopleSoft Application Fundamentals

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

- PeopleSoft EnterpriseOne Inventory Management PeopleBook
- PeopleSoft EnterpriseOne Product Data Management PeopleBook
- PeopleSoft EnterpriseOne Shop Floor Management PeopleBook

See Also

PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook

PeopleSoft EnterpriseOne Product Data Management 8.11 PeopleBook

PeopleSoft EnterpriseOne Shop Floor Management 8.11 PeopleBook

Common Elements Used in this PeopleBook

Accept Percentage Indicates the percentage of tests that must pass in order for the sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use the accept percentage value, you must complete these fields on Test Definitions accordingly. Values are:

Blank: accept quantity

1: display/evaluate

Accept Quantity

Indicates the quantity of tests that must pass in order for the test sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use this accept quantity value, you must complete these fields on Test Definitions accordingly. Values are:

Blank: accept percentage

1: display/evaluate

Allowed Maximum

Enter the highest value for a passing test result.

Allowed Minimum

Enter the lowest value for a passing test result.

Customer Number

Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Item Number

Enter a number that the system assigns to an item. It can be in short, long, or third item number format.

Number of Samples

Enter the number of samples to be taken for the test.

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 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.

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 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.

Print Test

Enter a code used to determine whether or not a test will be printed on the Certificate of Analysis. Values are:

0: The test will not be printed on the Certificate of Analysis.

1: Print all occurrences of a test on the Certificate of Analysis.

2: Print just the average test result record when printing the Certificate of Analysis.

3: Print the last occurrence of a test when printing the Certificate of Analysis. The last occurrence will be the test results record that was entered last using Test Results Revisions.

Property

Enter the item attribute that is being tested.

Sample Percent	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. 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.
Sequence	For EnterpriseOne, enter the sequence by which users can set up the order in which their valid environments are displayed. For PeopleSoft World, enter a sequence or sort number that the system uses to process records in a user defined order.
Target Value	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.
Test Method	Enter a description of how to run a quality test. The test method is useful to both the company's 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.

CHAPTER 1

Getting Started with PeopleSoft EnterpriseOne Quality Management

This chapter provides an overview of Quality Management and discusses:

- Quality Management integrations
- Quality Management implementation

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 customers' quality expectations in the most timely and cost-effective manner.

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

Using the PeopleSoft Quality Management system, 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.

Quality Management Integrations

The PeopleSoft Quality Management system works closely with features in these systems:

- PeopleSoft EnterpriseOne Inventory Management.
- PeopleSoft EnterpriseOne Procurement.
- PeopleSoft EnterpriseOne Shop Floor Management.
- PeopleSoft EnterpriseOne Sales Order Management.

PeopleSoft EnterpriseOne Inventory Management

As you work with lots in the 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 Inventory Management using the Lot Availability (P41280) or Lot Master Revision program (P4108), you see test results exactly as they were input.

PeopleSoft EnterpriseOne Procurement

These procurement programs access the Quality Management system:

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

PeopleSoft EnterpriseOne Shop Floor Management

These Shop Floor Management programs access the Quality Management system:

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

PeopleSoft EnterpriseOne Sales Order Management

If you use the 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 automatically generate a certificate of analysis for a particular customer when shipments are confirmed.

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

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

Quality Management Implementation

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

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

Global Implementation Steps

Before you can implement Quality Management, you must complete several global implementation steps. Global implementation steps are completed by users of many different systems, and are not specific to Quality Management. Depending on the features and functionality that your organization uses, you might find that it is not necessary to complete all of these steps. This table lists the suggested global implementation steps for all EnterpriseOne manufacturing products:

Step	Reference
1. Set up global UDC tables.	PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook
2. Set up fiscal date patterns.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up an Organization,” Setting Up Fiscal Date Patterns
3. Set up companies.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up an Organization,” Setting Up Companies
4. Set up business units.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up an Organization,” Setting Up Business Units
5. Set up next numbers.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up System Next Numbers”
6. Set up accounts, and the chart of accounts. (Optional)	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up Accounts,” Creating the Chart of Accounts
7. Set up the General Accounting Constants.	*PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook*, “Setting Up the General Accounting System,” Setting Up Constants for General Accounting
8. Set up multicurrency processing, including currency codes and exchange rates.	*PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook*
9. Set up ledger type rules. (Optional)	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up Ledger Type Rules for General Accounting”
10. Set up address book records.	*PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook*, “Entering Address Book Records”

Step	Reference
11. Set up default location and printers	PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook
12. Set up branch/plant constants.	*PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*, "Setting Up the Inventory Management System," Defining Branch/Plant Constants
13. Set up Manufacturing/Distribution AAIs.	*PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*, "Setting Up the Inventory Management System," Setting Up AAIs in Distribution Systems
14. Set up document types.	*PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*, "Setting Up the Inventory Management System," Setting Up Document Type Information
15. Set up shop floor calendars.	*PeopleSoft EnterpriseOne Shop Floor Management 8.11 PeopleBook*, "Setting Up Shop Floor Management," Setting Up a Shop Floor Calendar
16. Set up manufacturing constants.	*PeopleSoft EnterpriseOne Product Data Management 8.11 PeopleBook*, "Setting Up Product Data Management," Setting Up Manufacturing Constants

Quality Management Implementation Steps

This table lists the implementation steps for the Quality Management system.

Step	Reference
1. Activate Quality Management	Chapter 3, "Setting Up Quality Management," Activating Quality Management, page 10
2. Define tests	Chapter 3, "Setting Up Quality Management," Defining Tests, page 12
3. Enter user-defined codes	Chapter 3, "Setting Up Quality Management," Entering User-Defined Codes, page 19
4. Define specifications	Chapter 3, "Setting Up Quality Management," Defining Specifications, page 20
5. Set up preference profiles	Chapter 3, "Setting Up Quality Management," Setting Up Preference Profiles, page 23
6. Set up inclusion rules for test results tracing	Chapter 3, "Setting Up Quality Management," Setting Up Inclusion Rules for Test Results Tracing, page 35
7. Set up customer billing instructions for Quality Management	Chapter 3, "Setting Up Quality Management," Setting Up Customer Billing Instructions for Quality Management, page 35

CHAPTER 2

Understanding the Quality Management System

This chapter discusses:

- PeopleSoft Quality Management features.
- PeopleSoft Quality Management tables.

PeopleSoft 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 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 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.

PeopleSoft Quality Management Tables

The PeopleSoft 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 Quality Management

This chapter provides an overview of Quality Management setup and discusses how to:

- Activate Quality Management.
- Define tests.
- Enter user-defined codes.
- 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 Quality Management.

Understanding Quality Management Setup

This section lists prerequisites and discusses system setup.

Prerequisites

Before you can set up Quality Management, you must:

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

  See *PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*, “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 Quality Management 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 Quality Management, you must set up:

- Branch/Plant constants
- Tests

- (Optional) Specifications
- Preference profiles

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

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

Activating Quality Management

This section discusses how to:

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

Forms Used to Activate Quality Management

Form Name	Form ID	Navigation	Usage
EnterpriseOne System Control - Revision	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.	Activate PeopleSoft Quality Management at the system level.
Branch/Plant Constants	W41001H	Inventory Setup (G4141), Branch/Plant Constants Select a branch or plant on the Work With Branch/Plant Constants form, and click the Select button.	Specify each branch/plant that you want to include in quality control testing.

Activating Quality Management at the System Level

Access the EnterpriseOne System Control - Revision form.

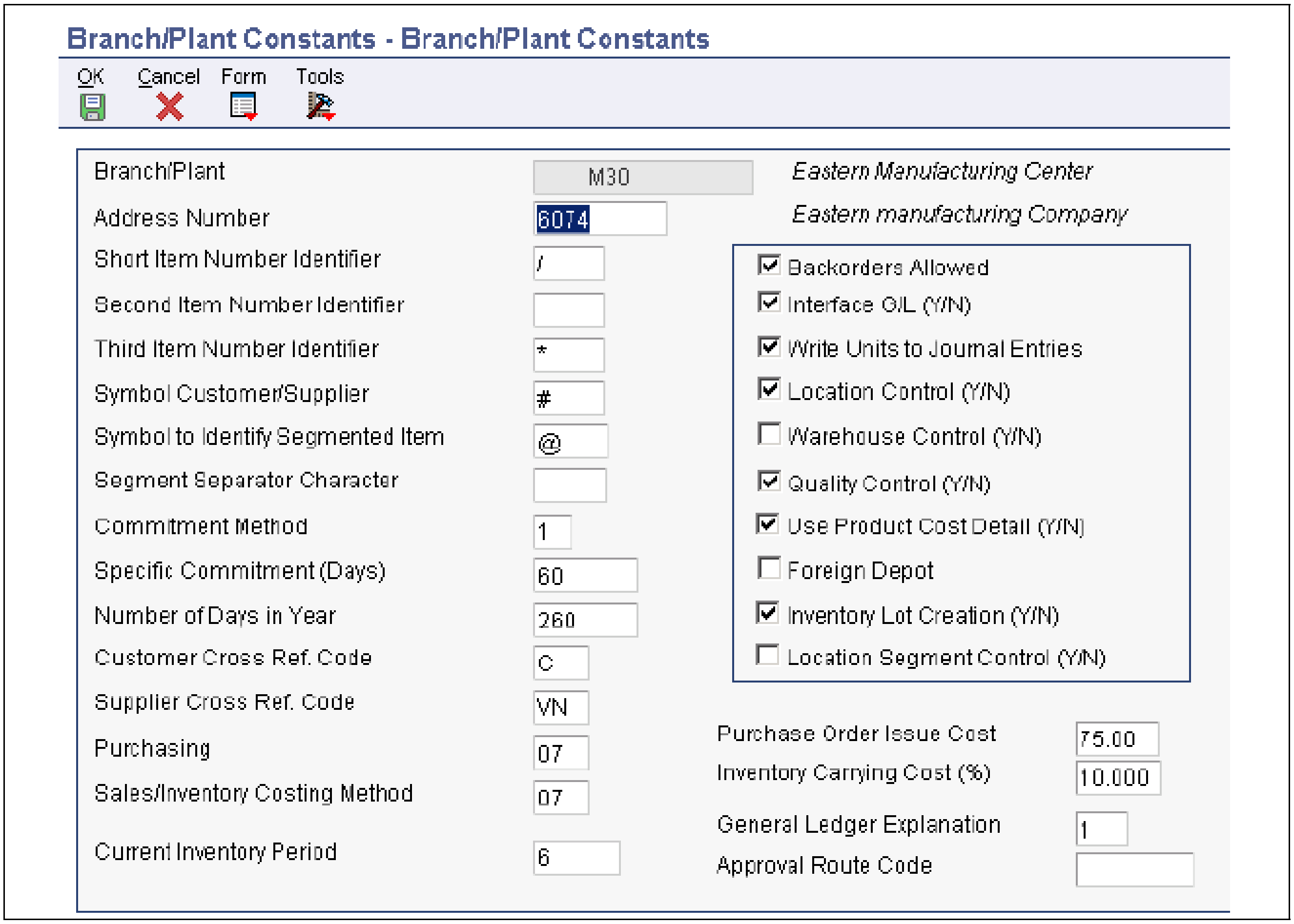
To activate Quality Management at the system level:

1. Select Yes, and then click OK.

   Selecting Yes indicates that this module has been installed in the system.
2. Click Find on the Work With EnterpriseOne System Control form.
3. Verify that the Use Module option is selected, and click Close.

Specifying Each Branch or Plant to Include in Quality Control Testing

Access the Branch/Plant Constants form:



Branch/Plant Constants - Branch/Plant Constants form

To specify each branch/plant to include in quality control testing:

1. Enter an alphanumeric code in the Branch/Plant field, and click Find.

   This code identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

   You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

   Business unit security might prevent you from viewing information about business units for which you have no authority.

2. Select the branch or plant that you want to include in quality control testing, and click Select from the list of available branch/plant entities.

3. Select the Quality Control (Y/N) check box.

   For PeopleSoft EnterpriseOne, selecting this check box indicates that you want to activate the PeopleSoft Quality Management system (system 37) for this branch/plant.

Defining Tests

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

- Define tests.
- Set processing options for Test Revisions (P3701).

Understanding Testing

After you activate 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 describes 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 user defined code 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 user defined codes, which allow you to enter free-form test results. For example, you might set up a test to calibrate equipment and then record when the test is performed. In this case, you are not concerned with a test result value.

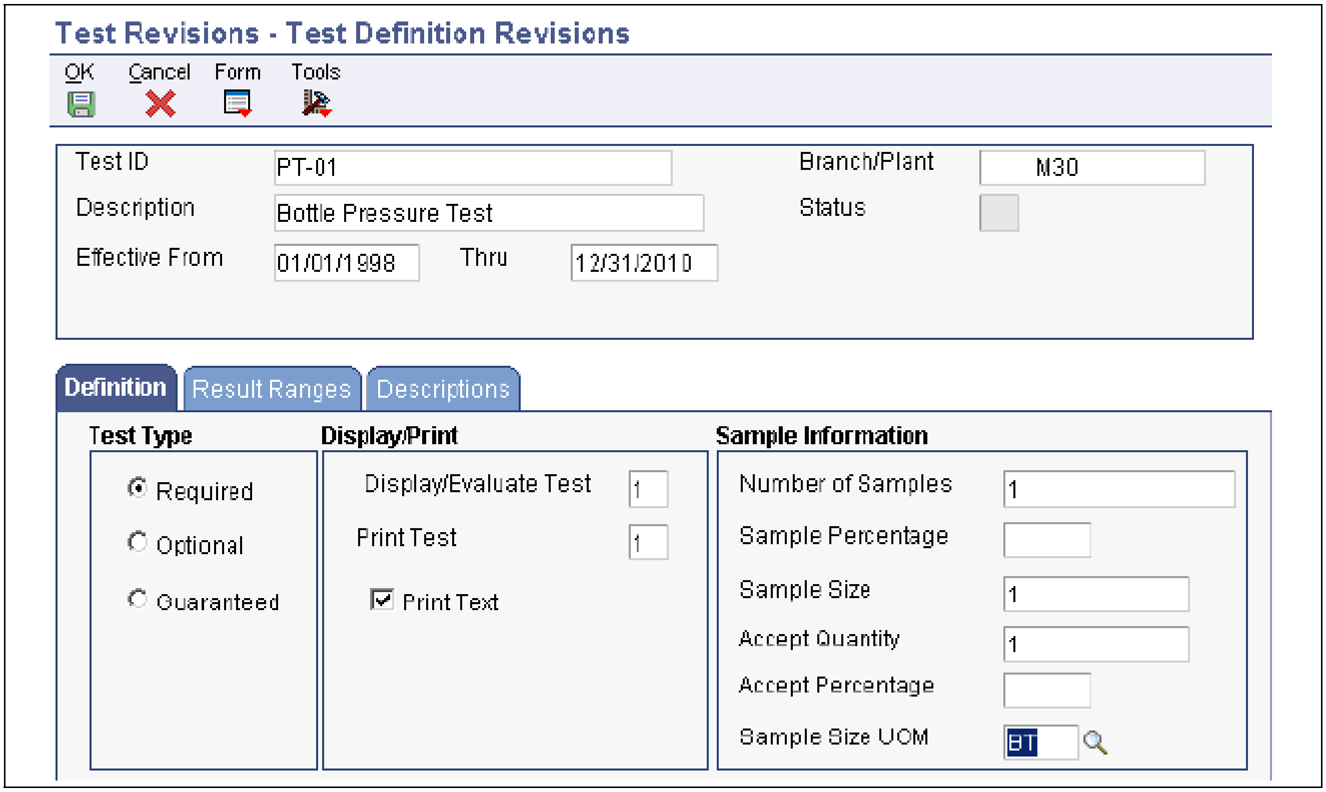
After you set up tests, you can review and revise them. You can also print a Test Definition report (R37410).

Form Used to Define Tests

Form Name	Form ID	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.

Defining Tests

Access the Test Definition Revisions form:



Test Revisions - 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 product Costing, Shop Floor Management, and Capacity Requirements Planning. The 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.

Effective 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 Product Costing, Shop Floor Management, and Capacity Requirements Planning. The 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, Test Type

Select Definition. Define how to record test results.

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, 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.

Print Test Enter a code used to determine whether or not a test will be printed on the Certificate of Analysis. Values are:

0: The test will not be printed on the Certificate of Analysis.

1: Print all occurrences of a test on the Certificate of Analysis.

2: Print just the average test result record when printing the Certificate of Analysis.

3: Print the last occurrence of a test when printing the Certificate of Analysis. The last occurrence will be the test results record that was entered last using Test Results Revisions.

Print Text 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:

1: Print the generic text associated with this test in Test Results Revisions on the Certificate of Analysis.

0: Do not print any generic text associated with this test in Test Results Revisions on the Certificate of Analysis.

Definition, Sample Information

Define information about the sample.

Number of Samples Enter the number of samples to be taken for the test.

Sample Percentage 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, since all units on the order must pass for the lot to pass.

Sample Size Enter the quantity of one sample to be taken for the test. As the system does not use this field, it is for the information only.

Accept Quantity Indicates the quantity of tests that must pass in order for the test sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use this accept quantity value, you must complete these fields on Test Definitions accordingly. Values are:

Blank: accept percentage

1: display/evaluate

Accept Percentage Indicates the percentage of tests that must pass in order for the sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use the accept percentage value, you must complete these fields on Test Definitions accordingly. Values are:

Blank: accept quantity

1: 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.

Result Ranges, Alpha/Numeric

Select Results Ranges.

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

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.

Numeric

Determines whether a test result value will be numeric or alphanumeric. Values are:

1: Indicates that the result value is numeric and should be right justified.

0: Indicates that the result value is alphanumeric and should be left justified. Tests that are using alphanumeric result values can have User Defined Code tables 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 user-defined code (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 user defined code are used in combination to define test results and to associate an alphanumeric test result with a number and then evaluate the test.

User Defined Codes

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

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

Result Ranges, Result Ranges

Define information about the sample and how to evaluate it.

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 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.

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 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.

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

Result Unit of Measure Enter a user defined code (37/UM) that identifies the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.

Descriptions, Category

Select Descriptions. Categorize tests into groups for reporting purposes.

Descriptions, Descriptions

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

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's 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.

Setting Processing Options for Test Revisions (P3701)

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

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

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

1. Status Use this processing option to 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.

1. Log History

Use this processing option to 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 test definition before applying modifications.

1: Record test definition before applying modifications.

Workflow

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

1. Workflow

Use this processing option to 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: Workflow approval is not activated; revised test definition is available for immediate use.

1: Workflow approval is activated; revised test definition is approved before the test definition is available for use.

Entering User-Defined Codes

When you set up alphanumeric values for test results, you can set up a user defined code 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 user defined code, the second description column contains a numeric value that represents the value of the alphanumeric code. You should use whole numbers rather than 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 user defined code list. Changing decimals after you set them up might produce unpredictable results.

Defining Specifications

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

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

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:

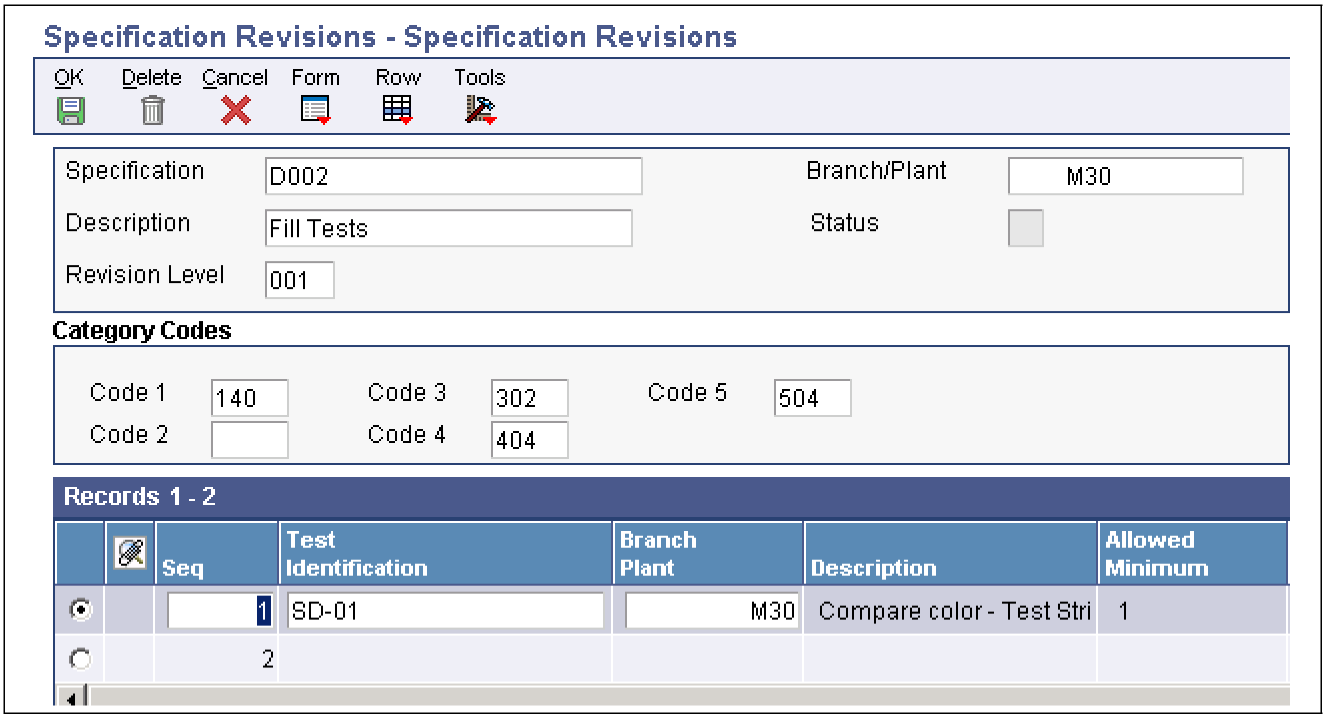
- Set the processing option for the Specification Revisions program (P3702) to activate workflow and use the approval process.
- Set the processing option for the Specification Revisions program to log changes to specification definitions to create historical information.

Form Used to Define Specifications

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

Defining Specifications

Access the Specification Revisions form:



Specification Revision - 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 Processing Options for Specification Revisions (P3702)

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

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

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

1. Status

Use this processing option to 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

Use this processing option to 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 logging.

1: Perform logging.

Workflow

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

1. Workflow

Use this processing option 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: Workflow approvals are not activated; revisions are available for use immediately.

1: Workflow approvals are activated; revisions must be approved before they are available for use.

Setting Up Preference Profiles

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

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

Understanding Preference Profiles

In the PeopleSoft 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, for example.

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 defined for it. Preference profiles also provide some limited control of users' 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
- The company's policies
- Regulatory agency rules

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

An example of a specification is a blending specification for a soft drink, which contains tests for caffeine, color shade, and syrup concentration. These individual tests within the specification, 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 Setup

Before you begin to define the PeopleSoft Quality Management system preferences, you must set up the preference master record for 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, for example. The preference type for Quality Management is hard-coded to 18.

The preference hierarchy that you define for Quality Management uses additive preferencing. When you enter test results, the system locates 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 F4101and F4102 tables if you define tests and enter test results by item.

  See *PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*, “Entering Item Inventory Information,” Entering Item Master Information.

  See *PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*, “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 *PeopleSoft EnterpriseOne Advanced Pricing 8.11 PeopleBook*, “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	Form ID	Navigation	Usage
Work with Preference Master	W40070C	Quality Management Setup (G3741), Preference Master	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	Quality Management Setup (G3741), Quality Preference Revisions Click the Add button on the Work With Quality Management Profile form.	Select a preference hierarchy.
Quality Management Profile Revisions	W40318B	Select a hierarchy on the Preference Hierarchy Selection form, and click the Select button.	Define preference profiles.
Display Criteria Window	W40318D	Select a row on the Quality Management Profile Revisions form, and select Display Criteria from the Row menu.	Customize display criteria. Selections that you make here control what appears on the Test Results Revisions form. If you don't want to perform quality testing for a particular program, verify that the corresponding option is clear. 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.
Quality Management Profile Revisions	W40318B	Quality Management Setup (G3741), Quality Preference Revisions Select a specification on the Work With Quality Management Profile form, and click the Select button.	Define the tests and specifications that make up the preference.

Setting Up a Quality Preference Master Record

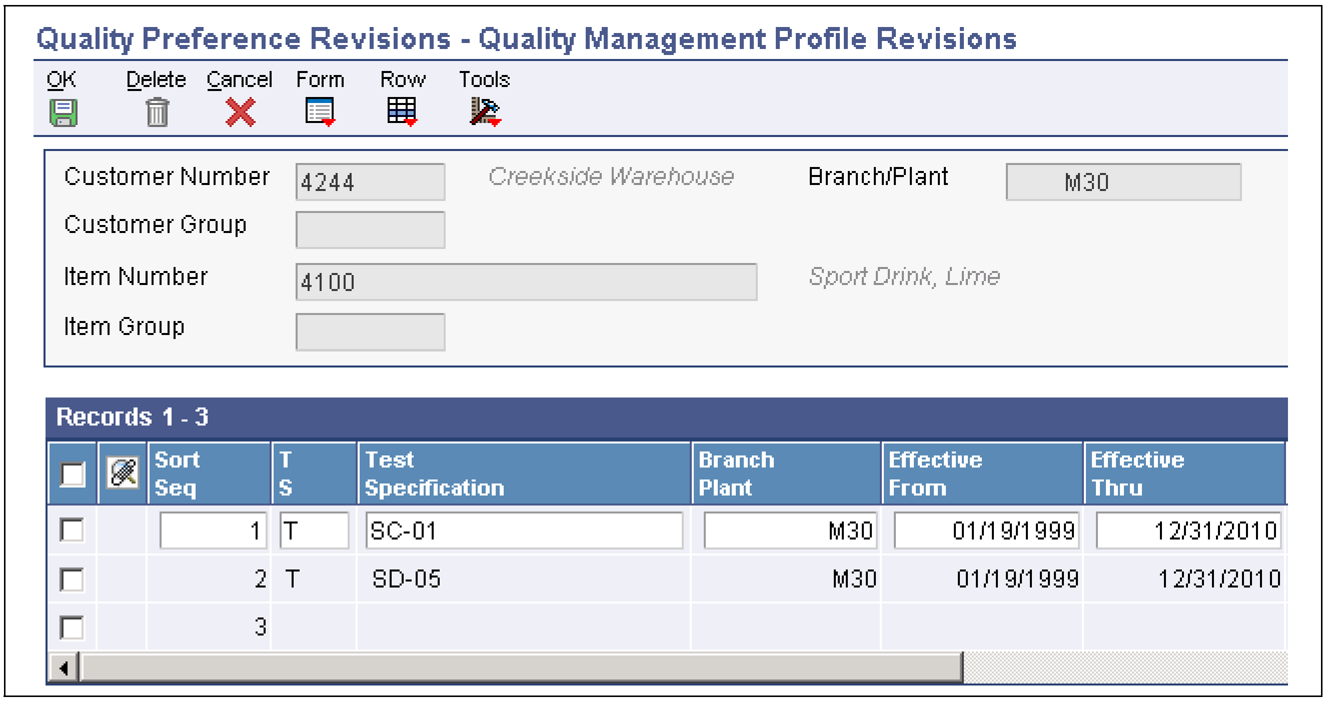
Access the Work with Preference Master form.

To set up a quality preference master record:

1. Enter *18* in the Preference Type field, and then click Find.
2. Select the preference, and select Hierarchy from the Row menu.
3. Type consecutive numbers at the intersections of rows and columns to define the hierarchy for the preference on Preference Hierarchy Revisions form.
4. Click OK.

Defining Preference Profiles

Access the Quality Management Profile Revisions form:



Quality Preference Revisions - Quality Management Profile Revisions form

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

Customer Number Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Item Number Enter a number that the system assigns to an item. It can be in short, long, or third item number format.

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

T S (test or specification) Enter a code that indicates whether a record within preference profiles (item/test specifications) is a test or specification. Values are:

T (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.

S (specification)

Test Specification	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
Test Type	Enter a value that specifies how the system processes tests as you enter test results. Values are: *R* (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. *O* (optional): Result values are optional during results entry. The system does not require the entry of a result for each optional test. However, if you enter failing results, the item fails quality inspection. *G* (guaranteed): Result values are optional during results entry. You can control whether Guaranteed tests appear as you enter test results with the Display Test field on Test Revisions. In addition, guaranteed tests print on the Certificate of Analysis.
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 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.
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 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.
Result UM (result unit of measure)	Enter a user defined code (37/UM) that identifies the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.
Display Dec (display decimals)	Enter a value that designates the number of decimals in the currency, amount, or quantity fields the system displays.
Test Method	Enter a description of how to run a quality test. The test method is useful to both the company's 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.

Sample Percent

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.

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.

Accept Quantity

Enter a flag that indicates the quantity of tests that must pass in order for the test sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use this accept quantity value, you must complete the following fields on Test Definitions accordingly. Values are:

Blank: accept percentage

1: display/evaluate

Accept Percent

Enter a flag that indicates the percentage of tests that must pass in order for the sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use the accept percentage value, you must complete the following fields on Test Definitions accordingly. Values are:

Blank: accept quantity

1: display/evaluate

Print Test

Enter a code used to determine whether or not a test will be printed on the Certificate of Analysis. Values are:

0: The test will not be printed on the Certificate of Analysis.

1: Print all occurrences of a test on the Certificate of Analysis.

2: Print just the average test result record when printing the Certificate of Analysis.

3: Print the last occurrence of a test when printing the Certificate of Analysis. The last occurrence will be the test results record that was entered last using Test Results Revisions.

Customizing Display Criteria

Access the Display Criteria Window form.

Manufacturing Operations

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:

Co-/By-Product 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: The test will appear on Test Results Revisions.

0: The test will not appear on Test Results Revisions.

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

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: The test will appear in Test Results Revisions.

0: The test will not appear in Test Results Revisions.

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: The test will appear on Test Results Revisions.

0: The test will not appear on Test Results Revisions.

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

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: The test will appear on Test Results Revisions.

0: The test will not appear on Test Results Revisions.

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:

1: The test will appear on Test Results Revisions.

0: The test will not appear on Test Results Revisions.

Type

Enter a user defined code (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 then uses the specific type of routing that you define in the work order routing.

Product Costing and 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.

To split specifications:

1. Select a record, and then select Split Spec from the Row menu.
2. Review the separate tests for this specification; you can override test definition values if necessary.

   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.

Setting Processing Options for Preference Profile Quality Management (P40318)

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

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

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

1. Status

Use this processing option to 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.

1. Log History	Use this processing option to 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 logging. *1:* Activate logging.

Workflow

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

1. Workflow	Use this processing option 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: Workflow approvals are not activated; revisions are available for use immediately. *1:* Workflow approvals are activated; revisions must be approved before they are available for use.

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 then 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 then 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. Note these considerations:

- If you do not activate workflow processing, any changes that you make are effective immediately.
- If you activate workflow processing, changes are not effective until they have completed the workflow process.

  You can change only active records 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.

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 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 Workflow Management system to approve or reject Quality Management revisions.

Prerequisites

Before you can work with approval processing:

- Set up workflow processing.

  See *EnterpriseOne 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).

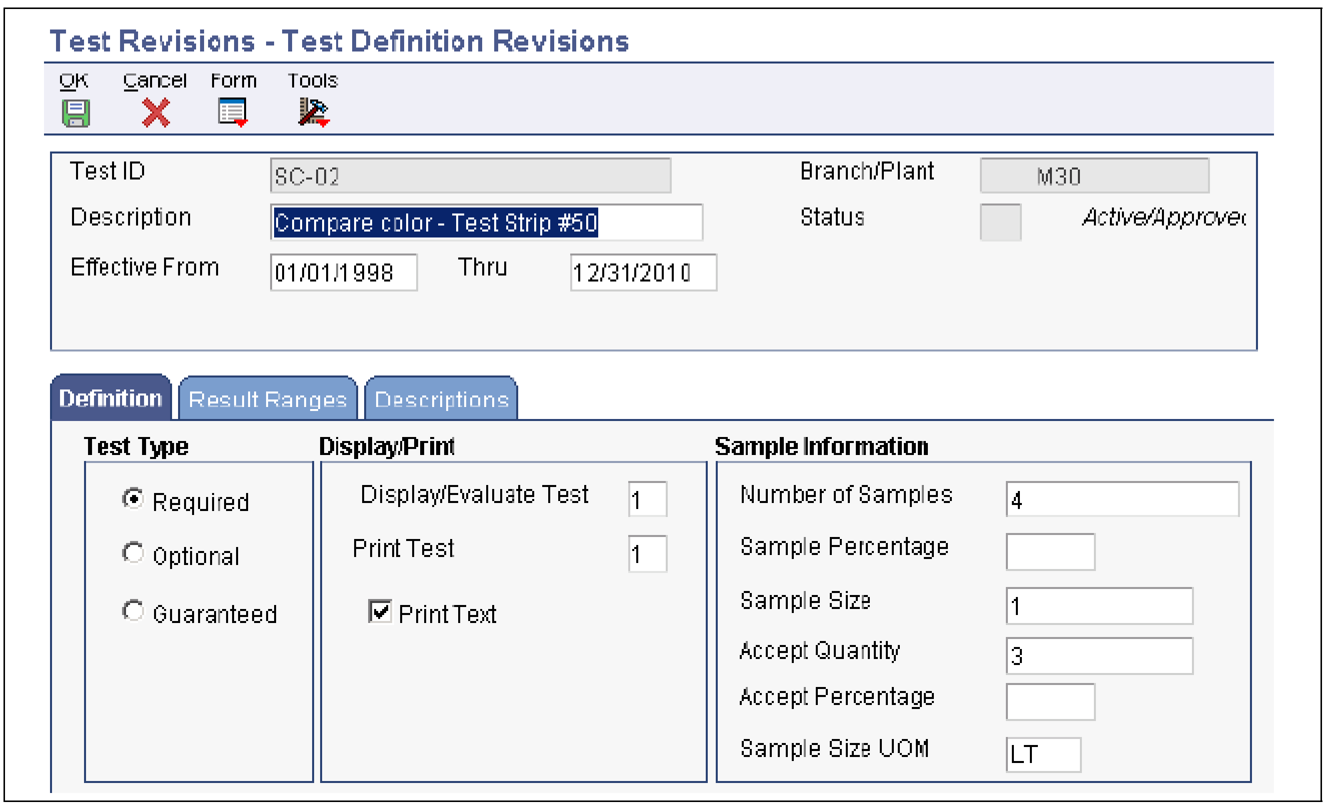
Forms Used to Approve Changes

Form Name	Form ID	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.

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



Test Revisions - Test Definition Revisions form

Revise the test information as necessary, and click OK. When the workflow processing option is active, click OK to initiate the approval process.

Note. The steps for revising tests, specifications, and preferences are basically the same. This example provides the steps for revising tests. It assumes that you are using workflow processing.

Approving Revisions

Access the Quality Management Approvals Workbench.

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

- Select the record and then 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.

Note. The steps for approving tests, specifications, and preferences are basically the same. This example provides the steps for approving a test revision 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	Form ID	Navigation	Usage
Quality Management Profile Revisions	W40318B	Quality Management Setup (G3741), Test/Specification Where Used Select a test or specification on the Test/Specification Where Used form, and select Preferences from the Row menu.	Review tests and specifications. You can review a specific test or specification for all of the branch/plants by typing * in the Branch/Plant field. You can review all tests and specifications by typing * in the Test/Specification field.

Reviewing Tests and Specifications

Access the Quality Management Profile Revisions form.

To review tests and specifications:

1. Review or change the preference information.
2. Select the record that you want to change, and then select an option from the Row menu if you must make other changes.
3. Click OK.

Setting Up Inclusion Rules for Test Results Tracing

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

Setting Up Customer Billing Instructions for 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 Quality Management.

Understanding Customer Billing Instructions

If you use the 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 Quality Management

Form Name	Form ID	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.	Set up customer billing instructions for 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 user defined code (01/ST) that specifies the kind of address book record to search for. Examples include:

E: Employees

X: Ex-employees

V: Suppliers

C: Customers

P: Prospects

M: Mail distribution lists

TAX: Tax authorities

Setting Up Customer Billing Instructions for Quality Management

Access the Billing Information form.

Select the Certificate Of Analysis Print option to indicate that the system should print a Certificate of Analysis for the customer on the Billing Page 1 tab.

The values are:

Glossary	Definition
Y	Allows the printing of the Certificate of Analysis.
N	Prevents 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 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 Quality Management system, you collect samples and perform quality tests at the points in the business cycle that you defined in a preference profile. Then, you enter and review the test results for an item. An example of a test result is a 0.20 percent syrup result for a sample of a soft drink that you are testing for syrup concentration.

You can process test results from within the Quality Management system.

You can also access Quality Management from other systems when you perform 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.

These programs access Quality Management information:

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 then 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.

Format	Description
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	You enter test results as part of a load confirmation within the Transportation Management system. You enter test results that must be entered for compartmentalized load during load confirm, according to the setup of the load type and quality preferences. You can set up test results for packaged or bulk items.

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 a customer's 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 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:

- Appears in alphanumeric format (the Numeric option on the Test Definition Revisions form is turned off).
- Is not set up with a user defined code list.

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 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 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 Quality Management system assigns unique sample numbers only if they have not been provided by the inbound data.

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.

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: • Access the Test Revisions program (P3701) for any parent work order items that require testing upon completion. • Review work order generic text. • Set processing options for default lot, work order, and operation status.
Super Backflush	When you backflush labor and material for a work order, you can: • Access the Enter Test Results program (P3711) for any parent items that require testing. • Review generic text for the parent item and operations. **Note.** The work order routing step is defined as a pay point where test results are to be entered.

Program Functions	How to Use Test Results
Work Order Time Entry	When you charge actual hours and quantities to a work order, you can: • Access the Enter Test Results program for completed items that require testing. • Review generic text for the parent item. • Set processing options for work order status and operation status. **Note.** Test results are entered against a specific routing step on the work order.
Bill Revisions	When you maintain bills of material, you can use the Quality Preference Revisions program to maintain tests for the parent item.
PO Receipts	When you receive items, you can access the Enter Test Results program for items that require testing.
Receipt Routing	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.
Sales Order Entry	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.

Selecting Tests for Results Entry

This section provides an overview of where to enter test results, lists prerequisites, and discusses how to select tests for results entry.

Understanding Where to Enter Test Results

You can enter test results for an item and lot from the Quality Management system menu or from many programs within the Manufacturing and Distribution systems. If you access 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 defined preference profiles to select the correct set of tests for results entry. You can enter test results for an item and lot from the Quality Management system menu or from many programs within the Manufacturing and Distribution systems. If you access 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 defined preference profiles to select the correct set of tests for results entry.

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 turned on for at least one test in the preference profile.

  Turning on this option ensures that the Enter Test Results after Completion option on the Work Order Completions Detail form is turned on and that the Enter Test Results program is automatically called when you enter a work order quantity.

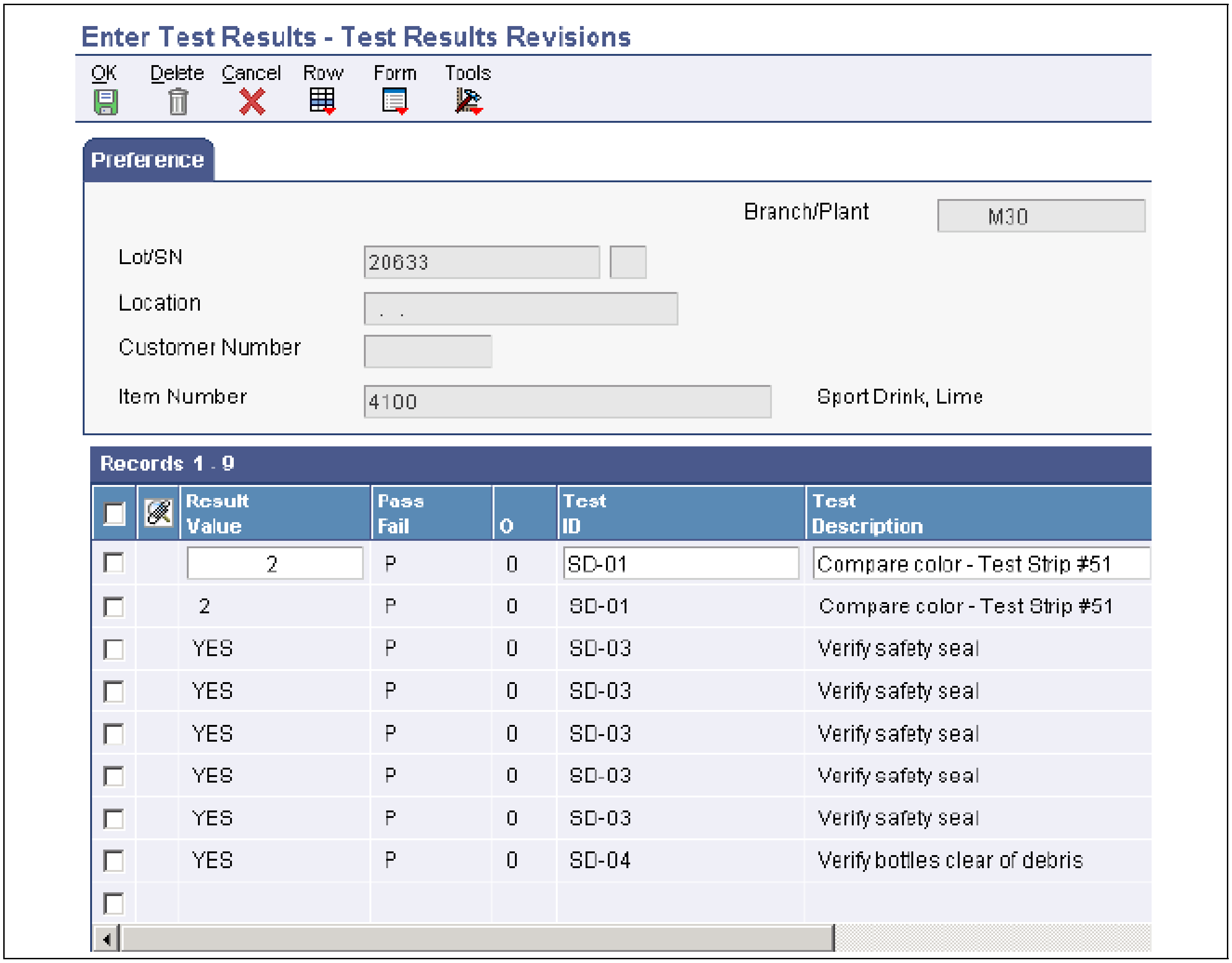
Forms Used to Select Tests for Results Entry

Form Name	Form ID	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.	Select tests in preference format.
Work Order Completion Detail	W31114B	Daily Order Reporting - Discrete (G3112), Full Completion Select a work order on the Work With Work Order Completions form, and select Revisions from the Row menu.	Add test results in order number format.

Choosing Tests in Preference Format

Access the Test Results Revisions form.

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.



Enter Test Results - Test Results Revisions form

To choose tests in preference format:

1. Complete the fields.
2. Select Preference from the Form menu.
3. Complete these fields, and then click OK:
   - Result Value
   - Test ID
   - Sample
   - Tester
   - Date Tested
   - Time Tested

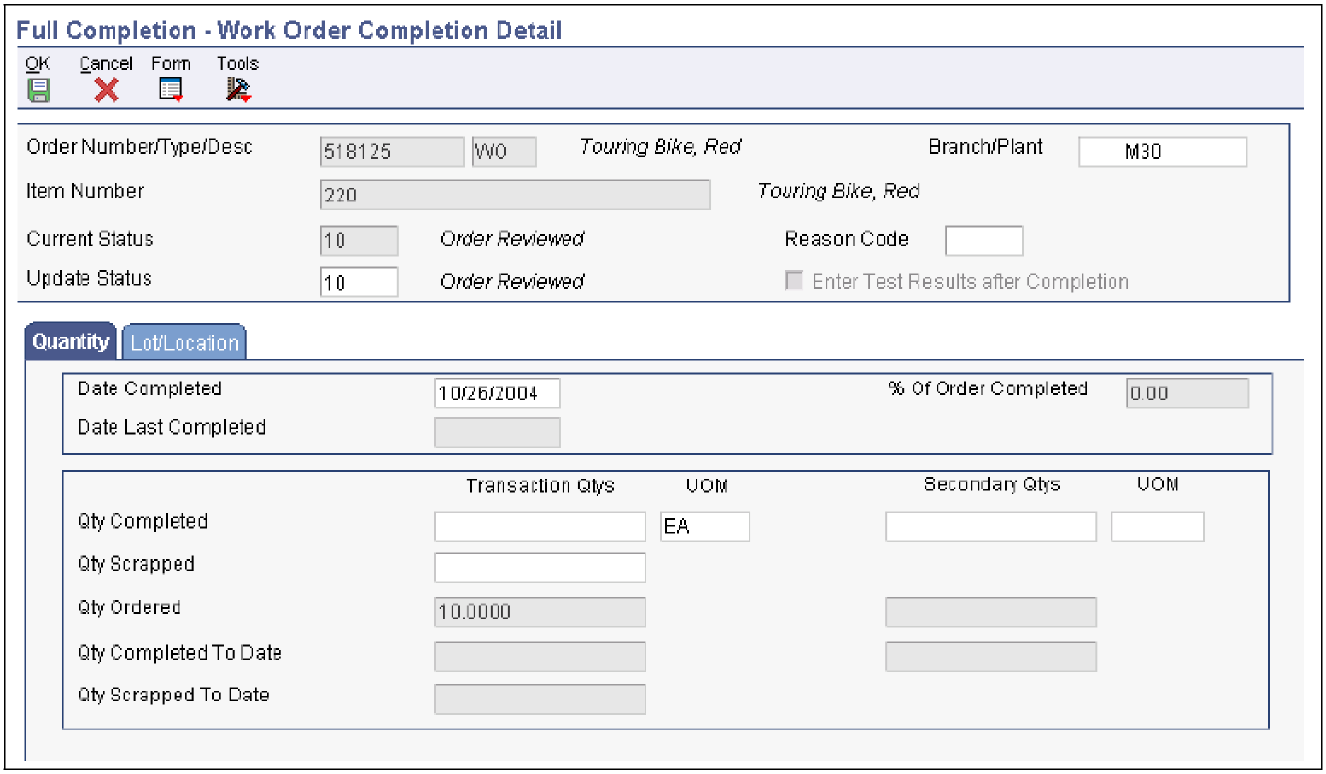
Lot/SN (lot/serial number) Enter a number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.

Item Number Enter a number that uniquely identifies an item. It can be in short, long, or third item number format.

	If you set Allow Duplicate Lots to 2 on the System Constants form of the Branch/Plant Constants program (P41001), the Item Number field is required.
Location	Enter the storage location from which goods will be moved.
Customer Number	(Optional) Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Choosing Tests in Order Number Format

Access the Work Order Completion Detail form:



Full Completion - 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 a lot/serial number.

   A lot is a group of items with similar characteristics. For items that are lot-controlled, the system enters the lot number automatically, according to the Lot Process Type setting in the F4102 table.

   Note. The system does not automatically enter a lot number if the Lot Process Type is 3.

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.

4. Complete these fields on the Test Results Revisions form:

   - Result Value

- Test ID
- Sample
- Tester
- Date Tested
- Time Tested.

5. Click OK.

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 then it evaluates the status of the entire set of tests in order to determine lot status. As the system evaluates the lot, it reads a test and then retrieves the 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 shows that the source material 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 that show test results, including the Test Results Revisions and all inquiry forms.

It is possible to override the Pass/Fail value to force the lot to pass. However, you should secure this 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. Use the Nonconforming Product program (P3703) to view these records.

Form Used to Enter Test Results

Form Name	Form ID	Navigation	Usage
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results Select a record on the Work With Test Results form, and click the Select button.	Enter test results

Entering Test Results

Access the Test Results Revisions form.

To enter test results:

1. Enter the result of the performed test in the Result Value field.
2. Enter a Test ID.

   If you did not set the processing option for system-assigned sample numbers, enter a sample number for the test result in the Sample field.
3. (Optional) Enter the address book number of the person who originated the change request.

   The system verifies this number against the Address Book in the Tester field.
4. (Optional) Enter the date on which the test was performed in the Date Tested field.
5. (Optional) Enter the time at which the test was performed in the Time Tested field.

Note. You can complete the Tester, Date Tested, and Time Tested fields only when the processing options are set up to allow you to update this information. You can override the default values for the date and time.

---

6. Repeat the procedure for each test result.

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

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

   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.

   The system evaluates each individual test and assigns a pass or fail code. The system then updates the lot status as passing or failing, based on the processing options.
8. Verify the test results for the lot that you just entered.

   You can revise any test results, if necessary.

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. Users of the Quality Management system, however, can see that results were overridden because the system enters *1* in the Test Override field (data item TOVR) in the Enter Test Results program (P3711) or Test Results Workbench program (P37203).

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

Forms Used to Override Test Status

Form Name	Form ID	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. Then, 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	Quality Management Daily Operations (G3711), Enter Test Results 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: Select P (passed) or F (failed).

  The system updates the value in the Test Override field on the Test Results Revisions form.

2. Select Attachments from the Row menu on the Test Results Revisions form.
3. Select New and then Text from the File menu on the Media Objects form.
4. Type a memo describing why you changed the status of the test, and then click Save & Exit on the File menu.

Creating New Samples

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

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

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 after retesting.

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 set the processing option to display the Number of Samples field.

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, use the New Sample option.

After you perform a quality test on an item's sample and record the results, you can create additional samples for retesting purposes additional samples for retesting 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 the related preference.

Prerequisite

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

Forms Used to Override the Number of Samples

Form Name	Form ID	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.	Create additional samples for retesting.

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. Select those samples and click Delete if there are samples that you do not need.
6. Click OK.

Creating Additional Samples for Retesting

Access the Test Results Revisions form.

To create additional samples for retesting:

1. 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 use the Copy Test option on the Row menu to create one new sample for *one* test.
2. Select that sample and click Delete if you do not need to enter test results for a particular new sample.
3. Click OK.

Setting Processing Options for Enter Test Results (P3711)

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

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Test Results

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

1. Results Entry Format

Use this processing option to 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

Use this processing option to specify the default address book number for the tester. If you leave this processing option blank, you must manually enter the tester's address book number for each test.

3. Minimum and Maximum Parameters

Use this processing option to 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.

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

4. Number of Samples

Use this processing option to display the Number of Samples field on the Test Results Revisions form. You can then 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 the Number of Samples field.

1: Display the Number of Samples field for input.

5. Copy Generic Text

Use this processing option to 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.

1: 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

Use this processing option to 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 rather than 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 for existing test results by lot number.

1: Search for existing test results by lot number.

7. Record Nonconforming Product

Use this processing option to 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. You can then review all failed lots and assign corrective actions. Values are:

Blank: Do not record failed tests.

1: Record failed tests in table F3703.

8. Activate System Sample Numbering

Use this processing option to 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 sample numbers automatically.

1: Assign sample numbers automatically.

Security

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

1. Protect Date and Time

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

1: Protect date and time of test.

Blank: Do not protect date and time of test.

2. Protect Tester's ID

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

Blank: Do not protect tester's address book number.

1: Protect tester's address book number.

Lot Status

These processing options control lot availability and lot status update.

1. Status for a Failed Lot

Use this processing option to 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

Use this processing option to 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

Use this processing option to 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.

1: 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)

Use this processing option to 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)

Use this processing option to 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)

Use this processing option to 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)

Use this processing option to 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)

Use this processing option to 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.

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

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook, "Processing Sales Orders," Understanding Additional Order Processing During Ship Confirm

Working with External Test Results

You can load external test results from a laboratory information management (LIM) system into the 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. To access this program, select Quality Management Interoperability (G37311), Batch Test Results.

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.

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

The manner in which the Test Results Inquiry program (P37204) displays information depends on how you access it:

- When you access Test Results Inquiry from Inventory Management 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 then 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:

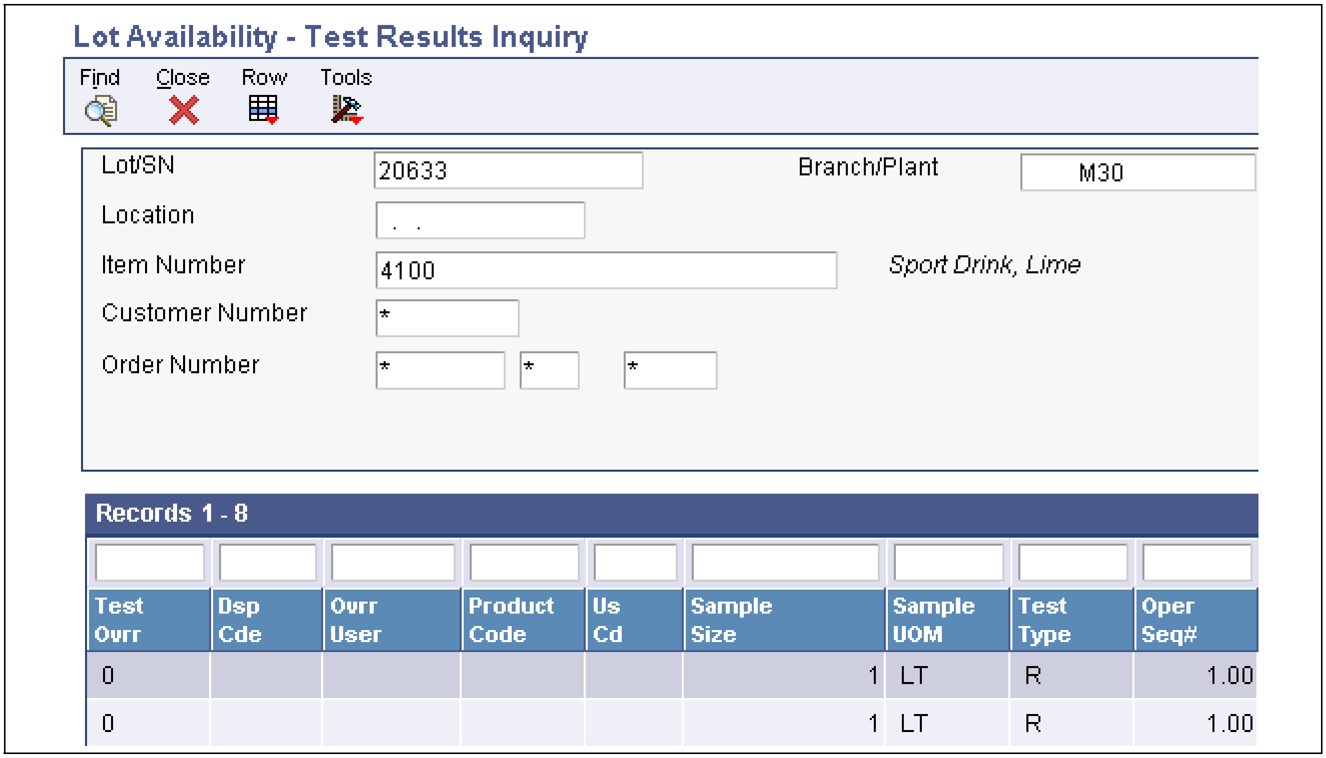
- Use Test ID and test ranges to filter for items that meet the customer's requirements on Selection Criteria Window.
- Locate items based on the Allowed Minimum or Allowed Maximum fields.
- Determine whether the lots that you review in the Item Search Returns Quantity program meet the customer or manufacturing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



Test Ovrr	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

Lot Availability - Test Results Inquiry form

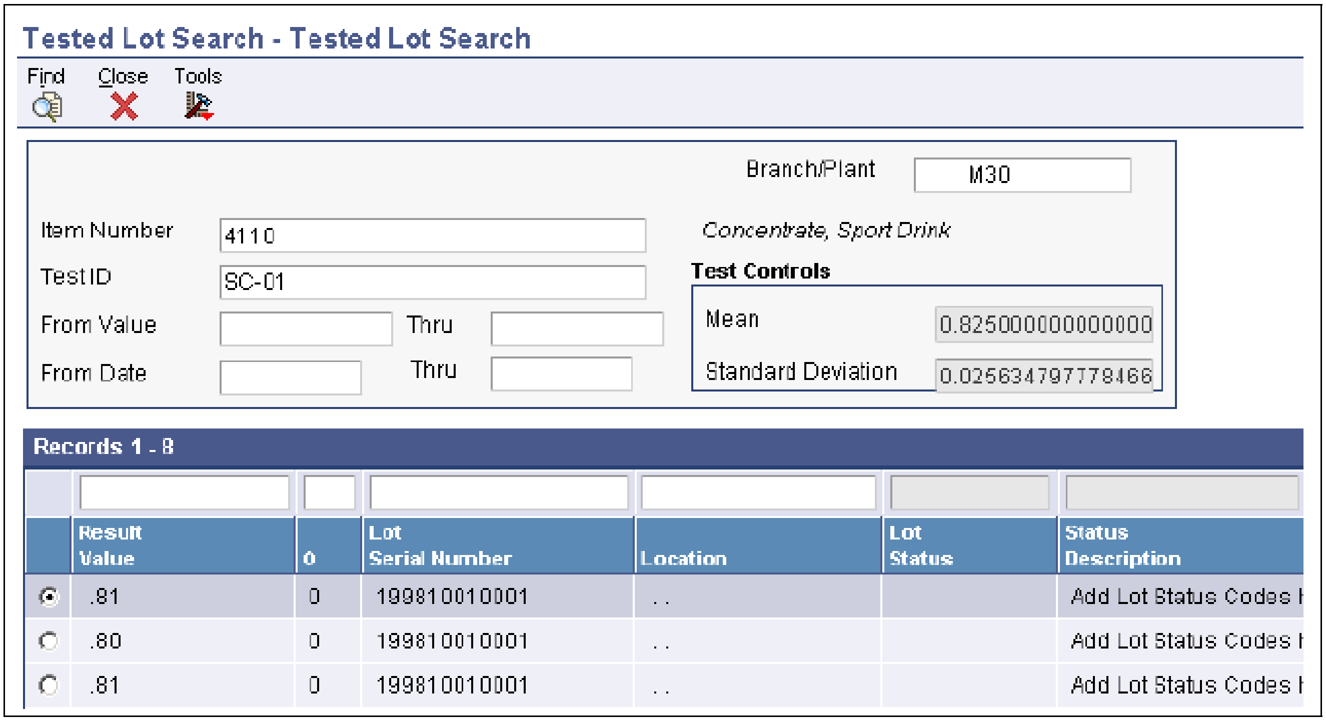
Test Ovrr (test overridden) Enter the flag which designates whether a test has been overridden. Values are:

1: overridden

0: not overridden

Locating Test Results by Item Number and Test ID

Access the Tested Lot Search form:



Test Results - Tested Lot Search form

Result Value

Enter the result of the performed test.

O (overridden)

Enter the flag which designates whether a test has been overridden. Values are:

1: overridden

0: not overridden

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 choose 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. To locate test results, you must enter a lot number in the header of the Work with Trace Results form.

Form Used to Trace Test Results

Form Name	Form ID	Navigation	Usage
Work With Trace Test Results	W37201D	Quality Management Daily Operations (G3711), Trace Test Results	Trace test results.

Tracing Test Results

Access the Work With Trace Test Results form.

To trace test results:

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

Managing 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.

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

Prerequisite

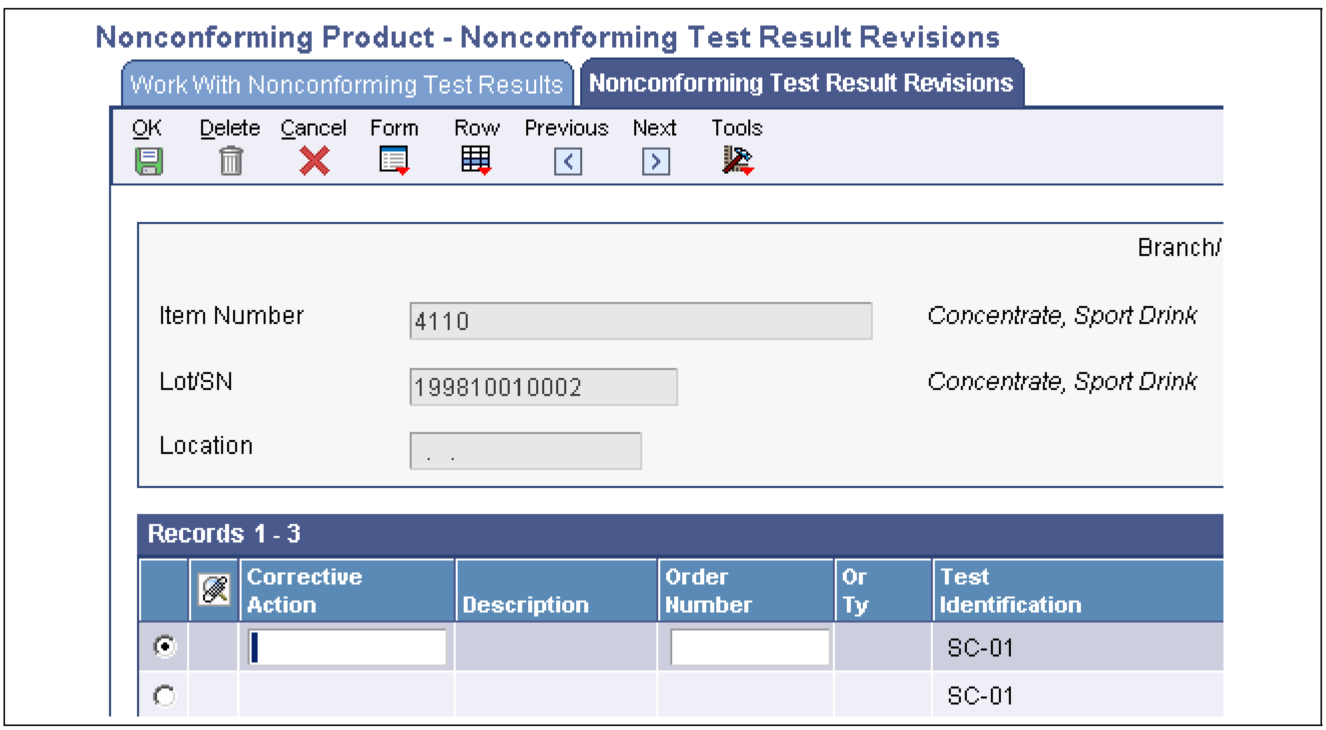
Set the processing option for the Enter Test Results program (P3711) to write failed tests to the F3703 table.

Form Used to Manage Failed Lots

Form Name	Form ID	Navigation	Usage
Nonconforming Test Results Revision	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 Product - Nonconforming Test Result Revisions form

Corrective Action Enter a user-defined code (system 37/type RC) that explains the action to be taken following the failed test. For example, a code could be used to indicate the material that failed testing should be reworked and brought to conforming standards.

Order Number 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.

Note. These fields do not generate rework orders. Rather, you use them to document any corrective action to be taken and to reference the associated work order, which must already be a record in the F4801 table.

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 complain about the taste of a beverage, a customer service representative might use the Test Results Workbench program to review beverage lot numbers and the tests were run for them.

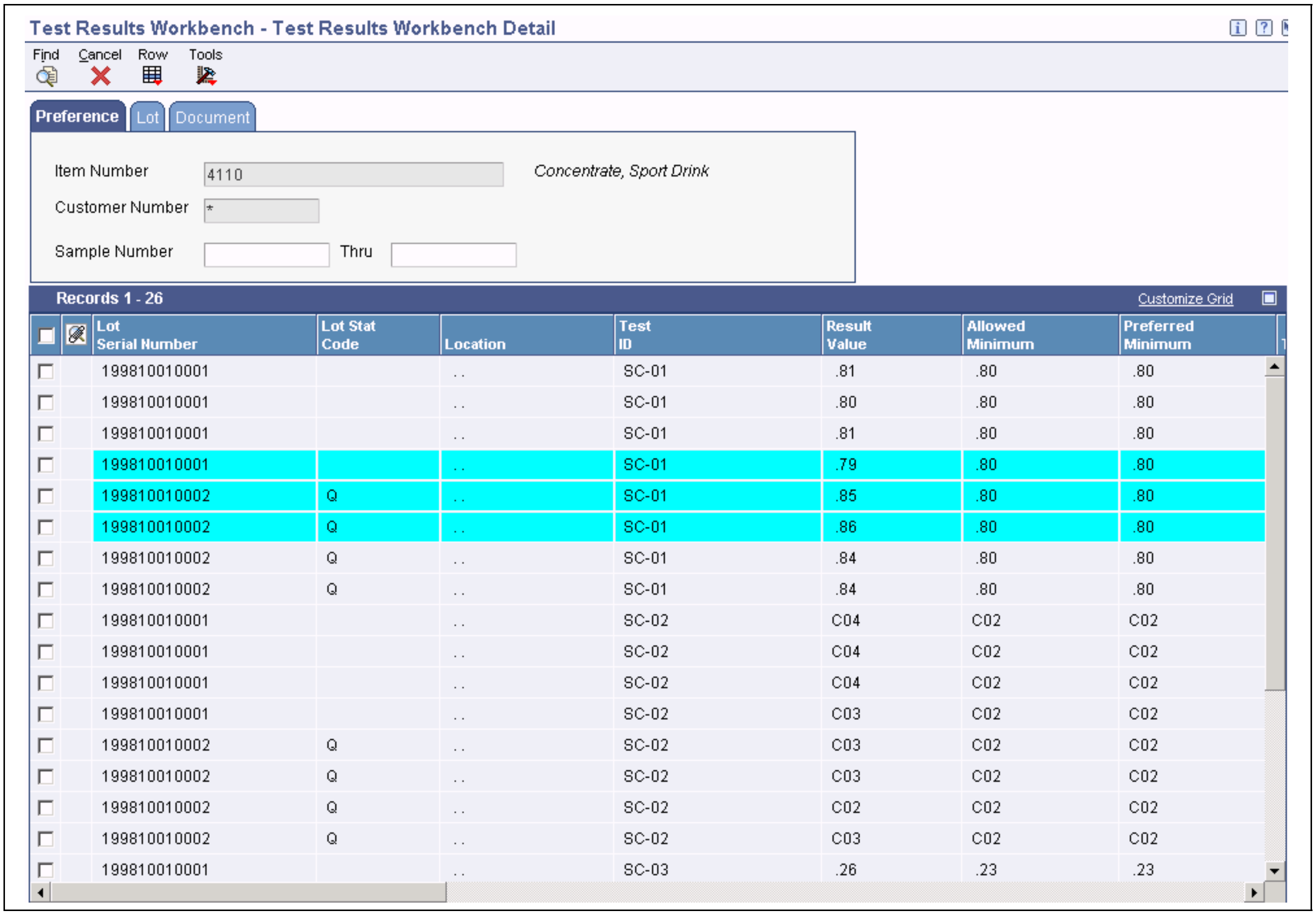
To review test results, you first enter the preference information in the header area. The system then select a test or group of tests according to this preference profile and locates all corresponding lots that have test results. You can then further filter the results by entering information in the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

Forms Used to Review Tested Lots by Preference Profile

Form Name	Form ID	Navigation	Usage
Test Results Workbench	W37203B	Quality Management Daily Operations (G3711), Test Results Workbench	Review test results for all lots that you tested.
Test Results Workbench Detail	W37203B	Select Result Detail from the Form menu on the Test Results Workbench form.	Filter the test results that you want to review to narrow the focus.

Reviewing Tested Lots by Preference Profile

Access the Test Results Workbench Detail form:



Test Results Workbench - Test Results Workbench Detail

Find Cancel Row Tools

Preference | Lot | Document

Item Number: 4110 — *Concentrate, Sport Drink*

Customer Number: *

Sample Number: Thru

Records 1 - 26 Customize Grid

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

Test Results Workbench Detail form

To review tested lots by preference profile:

1. Complete these fields on Test Results Workbench:
   - Branch/Plant
   - Item Number
2. (Optional) Complete the Customer Number field, and click Find:
3. Double-click each record until a check mark appears to the left of the record to select one or more records.

   To select all rows, do not double-click any record.
4. Select Result Detail from the Form menu.
5. Review the test results on the Test Results Workbench Detail form.

   If you need to enter more information to narrow the search, you can use the fields on the Preference, Lot, and Document tabs.

APPENDIX A

Delivered Workflow for PeopleSoft EnterpriseOne Quality Management

This appendix discusses the delivered workflow for PeopleSoft EnterpriseOne Quality Management.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Workflow Tools

Delivered Workflow for PeopleSoft EnterpriseOne Quality Management

This section discusses the PeopleSoft EnterpriseOne Quality Management workflow.

Test Definitions Approval

This section discusses the Test Definitions Approval workflow.

Description

Workflow Description	The system sends a workflow message to a specified approver when a user enters or changes a test definition. The test remains at a status of P (Pending) and the user cannot use the test until the approver changes the test status to A (Approved).
Workflow Trigger	When workflow is turned on in the processing options and a user enters or changes a test definition.
Workflow Action	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 then select Approve from the Row menu to approve the test.

Workflow Objects

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

Specification Definitions Approval

This section discusses the Specification Definitions Approval workflow.

Description

Workflow Description	The system sends a workflow message to a specified approver when a user enters or changes a specification definition. The specification remains at a status of P (Pending) and the user cannot use the specification until the approver changes the specification status to A (Approved).
Workflow Trigger	When workflow is turned on in the processing options and a user enters or changes a specification definition.
Workflow Action	The approver receives a message in the workcenter to approve the specification definition. When the approver selects the message in the workcenter, the system displays the Quality Management Approvals Workbench, where the approver can review the specification definition and then select Approve from the Row menu to approve the specification.

Workflow Objects

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

Quality Preference Approval

This section discusses the Quality Preference Approval workflow.

Description

Workflow Description	The system sends a workflow message to a specified approver when a user enters or changes a quality preference. The preference remains at a status of P (Pending) and the user cannot use the preference until the approver changes the preference status to A (Approved).
Workflow Trigger	When workflow is turned on in the processing options and a user enters or changes a quality preference.
Workflow Action	The approver receives a message in the workcenter 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 then select Approve from the Row menu to approve the preference.

Workflow Objects

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

APPENDIX B

PeopleSoft EnterpriseOne Quality Management Reports

This appendix provides an overview of shop floor reports and enables you to:

- View summary tables of all reports.
- View report details for selected reports.

Quality Management Reports

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

- Setup reports
- Test results reports

Use setup reports to review information about how you have defined tests, specifications, and preferences. These reports are setup reports:

- 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. These reports are test results reports:

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

PeopleSoft EnterpriseOne Quality Management Reports: A to Z

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

Report ID and Report Name	Description	Navigation
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.	Quality Management Setup (G3741), Test Definition Report
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.	Quality Management Setup (G3741), Specifications Report
R37420 Item Test Specifications (Sometimes referred to as the Preference Report)	Includes all test specifications by customer, customer group, item, or item group for the branch/plant that you select. Use this information to maintain and review preference profiles within the business.	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.	Test Results Worksheet report (R37470) when you run the Order Processing program (R31410) for manufacturing work orders. To generate the Test Results Worksheet report, you must specify a valid version of the report in the processing options for the Order Processing program
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

PeopleSoft EnterpriseOne Selected Quality Management Reports

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

Processing Options for the Test Definition Report (R37410)

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

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter the test status for selecting test definitions

A 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

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 Product Costing, Shop Floor Management, and Capacity Requirements Planning. The 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.

Processing Options for the Specifications Report (R37415)

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

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter the specification status for selecting specification definitions

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 Product Costing, Shop Floor Management, and Capacity Requirements Planning. The 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.

Processing Options for Item Test Specifications (R37420)

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

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Print

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

Print

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

Defaults

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

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

A 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/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 Product Costing, Shop Floor Management, and Capacity Requirements Planning. The 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 a customer's testing requirements, the work order header must contain the related customer's 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)

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

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Print

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

Print

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

Preference

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

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

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

Text

Select from these values 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 then 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)

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

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

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

Use this processing option specify which address to print on the Certificate of Analysis. Values are:

Blank: Ship to address

1: Print the ship to address.

2: Print the sold to address.

3: Print the parent address.

2. Next Status

Use this processing option 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.

1. Extract Table

Use this processing option to 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.

1. Trace

Use this processing option 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.

1. Preference

Use this processing option 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.

1: 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)

Use this processing option to print a Certificate of Analysis, which lists all of the tests performed and their results for lots sold to a customer. Enter the version of the Certificate of Analysis to print. If you leave this processing option blank, the program uses the ZJDE0001 version.

2. User Defined Program

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

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

3. User Defined Version

Use this processing option to 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

Use this processing option to specify the language in which to print the Certificate of Analysis. Values are:

Blank: Print the Certificate of Analysis in the default language.

1: Print the Certificate of Analysis in the customer's 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)

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

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Extract

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

1. Retain Extracted Information

Use this processing option 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 extracted information. The system clears the extract table each time a report is run.

1: Retain extracted information. The system does not clear the extract table each time a report is run.

Trace

This processing option controls whether you trace test results.

1. Trace Test Results

Use this processing option to 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.

1. User Defined Report

Use this processing option to specify the name of the customized report that you want to print. If you leave this field blank, the system prints the standard Product Test Report (R37450).

2. User Defined Version

Use this processing option to specify the name of the customized report that you want to print. If you leave this field blank, the system prints the standard Product Test Report (R37450).

Version

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

1. Product Test Report (R37450)

Use this processing option to specify the version of the Product Test report (R37450). If you leave this field blank, the system uses version ZJDE0001.

Glossary of PeopleSoft Terms

activity A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.

activity rule The criteria by which an object progresses from one given point to the next in a flow.

add mode A condition of a form that enables users to input data.

Advanced Planning Agent (APAg) A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

application server A server in a local area network that contains applications shared by network clients.

as if processing 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.

alternate currency 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.

In PeopleSoft 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.

as of processing 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 PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

back-to-back process A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.

batch processing A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.

In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.

batch server 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.

batch-of-one immediate 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.

See also direct connect and store-and-forward.

business function 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-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.
business function event rule	See named event rule (NER).
business view	A means for selecting specific columns from one or more PeopleSoft EnterpriseOne 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.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	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 PeopleSoft 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.
charts	Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in PeopleSoft 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 PeopleSoft EnterpriseOne General Accounting.
Control Table Workbench	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.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
currency restatement	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.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	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.

date pattern	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.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail information	Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	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.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	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.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft 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.
embedded event rule	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.
Employee Work Center	A central location for sending and receiving all PeopleSoft 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.
enterprise server	A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.
EnterpriseOne object	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.
EnterpriseOne process	A software process that enables PeopleSoft 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. PeopleSoft 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.
Environment Workbench	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.
escalation monitor	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.

event rule	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.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a *business unit* .
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	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 user request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	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.
interface table	See Z tables.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.
in-your-face-error	In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	Developed by PeopleSoft, 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.
jargon	An alternative data dictionary item description that PeopleSoft EnterpriseOne or People World displays based on the product code of the current object.
Java application server	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.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.
JDEIPC	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.

jde.log — The main diagnostic log file of PeopleSoft 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 PeopleSoft EnterpriseOne.

JDENET — PeopleSoft 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 PeopleSoft EnterpriseOne supported platforms.

Location Workbench — 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.

logic server — 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 PeopleSoft EnterpriseOne and World software runs.

MailMerge Workbench — An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

master business function (MBF) — 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.

master table — See published table.

matching document — A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.

media storage object — Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.

message center — A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.

messaging adapter — An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.

messaging server — 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.

named event rule (NER) — Encapsulated, reusable business logic created using event rules, rather that 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.

nota fiscal — In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

nota fiscal factura — In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

Object Configuration Manager (OCM)	In PeopleSoft 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.
Object Librarian	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 PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
Object Librarian merge	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
Open Data Access (ODA)	An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.
Output Stream Access (OSA)	An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
package	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 snap shot of the central objects on the deployment server.
package build	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft 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.”
package location	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. 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.
Package Workbench	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.
PeopleSoft Database	See JDEBASE Database Middleware.
planning family	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
preference profile	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
print server	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.
pristine environment	A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option
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.

production environment
A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.

production-grade file server
A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

program temporary fix (PTF)
A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.

project
In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path
The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* 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.

proxy server
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.

published table
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.

publisher
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.

pull replication
One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft 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.

QBE
An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event
A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.

refresh
A function used to modify PeopleSoft 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.

replication server
A server that is responsible for replicating central objects to client machines.

quote order
In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.

selection
Found on PeopleSoft 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.

Server Workbench
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.

spot rate
An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.

Specification merge
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.

specification
A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.

Specification Table Merge Workbench
An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.

store-and-forward
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.

subscriber table
Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.

supplemental data
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.

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 PeopleSoft EnterpiseOne systems.

table access management (TAM)
The PeopleSoft 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.

Table Conversion Workbench
An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.

table conversion
An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.

table event rules
Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft 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.

terminal server
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.

three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.
three-way voucher match	In PeopleSoft EnterpriseOne 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.
transaction processing (TP) monitor	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.
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	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.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way voucher match	In PeopleSoft EnterpriseOne 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.
User Overrides merge	Adds new user override records into a customer's user override table.
variance	In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment. In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, 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.
Version List merge	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.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	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.
Windows terminal server	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.

work day calendar	In EnterpriseOne Manufacturing Management, 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.
workflow	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.
workgroup server	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
XAPI events	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.
XML CallObject	An interoperability capability that enables you to call business functions.
XML Dispatch	An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.
XML List	An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.
XML Service	An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.
XML Transaction	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.
XML Transaction Service (XTS)	Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.
Z event	A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.
Z table	A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Interface tables also can be used to retrieve PeopleSoft EnterpriseOne data. Interface tables are also known as interface tables.
Z transaction	Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

Index

Q

R

S

T