JD Edwards World

Quality Management Guide

Release A9.3.x

E21929-03

April 2013

ORACLE®

JD Edwards World Quality Management Guide, Release A9.3.x

E21929-03

Contents

11 Review Test Results

Part III Processing Options

12 System Setup Processing Options

13 Test Results Processing Options

A Functional Servers

B   Import Mass Data into Quality Management

Index

Preface

Welcome to the JD Edwards World Quality Management Guide.

Audience

This document is intended for implementers and end users of JD Edwards World Quality Management system.

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

You can access related documents from the JD Edwards World Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1362397.1, or by using this link:

https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1362397.1

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Overview to Quality Management

This chapter contains these topics:

The Quality Management system helps you record and manage data that relates to the material quality of your products. Using this system, you can verify whether the material you produce meets your specifications at several points in your business flow, such as purchasing, sales order entry and the work order cycle.

Quality Management does not limit you to quality control by lots. You can run and record tests for individual items. This gives you greater flexibility to test items and record the results at several points in the process. Doing so allows you to pinpoint where failures or errors occur.

To maintain a successful quality management system, you must collect accurate and meaningful data. You can compile the data into useful charts and reports that help you make decisions and take corrective actions.

The JD Edwards World Quality Management system enables you to:

- Record inspection results in a consistent, controlled manner
- Monitor production processes to ensure product quality

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

1.1 Features

The Quality Management system includes the following features:

1.1.1 Tests

You can set up an unlimited number of tests to perform within your business cycle. For each test, you define whether the expected test result is numeric or alphanumeric, and 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.

1.1.2 Specifications

You can group tests that logically belong together or should always be performed together with a test specification. For each specification, you can indicate effective date ranges to invalidate tests that are replaced or that become obsolete.

Examples of specifications include mechanical, visual and electronic.

1.1.3 Item Test Specifications

After you define tests and specifications, you must create a type of preference profile called an item test specification. The item test specification determines which tests to perform and when to perform them for an item, item group, customer, or customer group. This enables you to customize your product tests for both your customers and the items they order.

An example of an item test specification is that one customer might require higher tolerances of a test than another. You would use preference profiles to group the appropriate tests and customize them for that customer.

1.1.4 Entering Test Results

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

- When entering a receipt for an item on a purchase order
- At any operation during purchasing receipts routing for purchase orders and work orders
- When moving an item to stock after production (completions)
- When entering hours and quantities
- When confirming a shipment or package
- When confirming an ECS bulk or package load

You can review test results at the following points in the manufacturing and distribution cycle:

- During sales order entry
- When reviewing lots

You can work with tests directly from the Quality Management system. You can also work with tests from programs in other systems. For example, when you enter a work order, you can sample the item and test it accordingly.

After you enter test results, the system evaluates the test results against minimum and maximum values and sets the lot status to pass or fail.

1.1.5 Reviewing Information

As you work with the Quality Management system, you can print tests and specifications by item or by branch/plant. You can also print test results by lot number or sales order number. You can use these documents within your business and print a certificate of analysis (COA) for your customers. The certificate of analysis includes for lots sold to a customer all the tests that were performed and the resulting test data.

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

1.1.6 Entering Generic Text

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

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

1.2 System Integration

Quality Management works closely with features in the following systems, all of which are prerequisites for using Quality Management:

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

1.3 Tables

Table	Description
Test Definition (F3701)	Contains test definitions which consist of the Test ID, description, type of test, minimum, maximum, target values and effectivity dates. This table also contains flags that indicate whether to print the test on the certificate of analysis and whether to print generic text.
Specification Master (F3702)	Contains the description of the specification, and effectivity dates.
Specification Detail (F37021)	Contains information about the different tests which are grouped within the specification.

Table	Description
Preference Profiles for Quality Management (F40318)	Identifies which tests or specifications are required for an item, item group, customer, or customer group. This table also contains minimum, maximum, target values, test type, print test flags, and effectivity dates.
Test Results (F3711)	Contains the results from the tests performed for an item located on a work order, purchase order, or sales order.
Test Results Work file (T3711W)	Contains test results if you have uploaded them from a LIM (Laboratory Information Management) system.
Certificate of Analysis (F37460)	Contains test result records that print on the Certificate of Analysis.
Non-Conforming Material (F3703)	Contains records of failed tests.

1.4 Menu Overview

The JD Edwards World Quality Management system uses the following menus.

Figure 1–1 Menu Overview

Menu Overview - Quality Management

Quality Management G37

Daily Operations

* Quality Management G3731

Setup Processes

* Quality Management Setup G3741

Part I

System Setup

This part contains these chapters:

- Chapter 2, "Overview to System Setup,"

- Chapter 3, "Set Up Branch/Plant Constants,"

- Chapter 4, "Set Up Tests,"

- Chapter 5, "Set Up Specifications,"

- Chapter 6, "Set Up Preferences,"

- Chapter 7, "Set Up Inclusion Rules for Test Results,"

- Chapter 8, "Set Up Customer Billing Instructions."

2

Overview to System Setup

This chapter contains these topics:

2.1 Objectives

- To activate Quality Management for a branch/plant
- To define and review tests
- To group tests into specifications
- To define which tests to perform on items for a customer
- To define which customers require a certificate of analysis

2.2 About System Setup

You can customize the Quality Management system to meet your business's specific testing needs. Testing features appear at different points in your business cycle based on the setup values you define.

The following graphic illustrates the information you must set up before you use the Quality Management system.

Figure 2–1   Quality Management System Setup
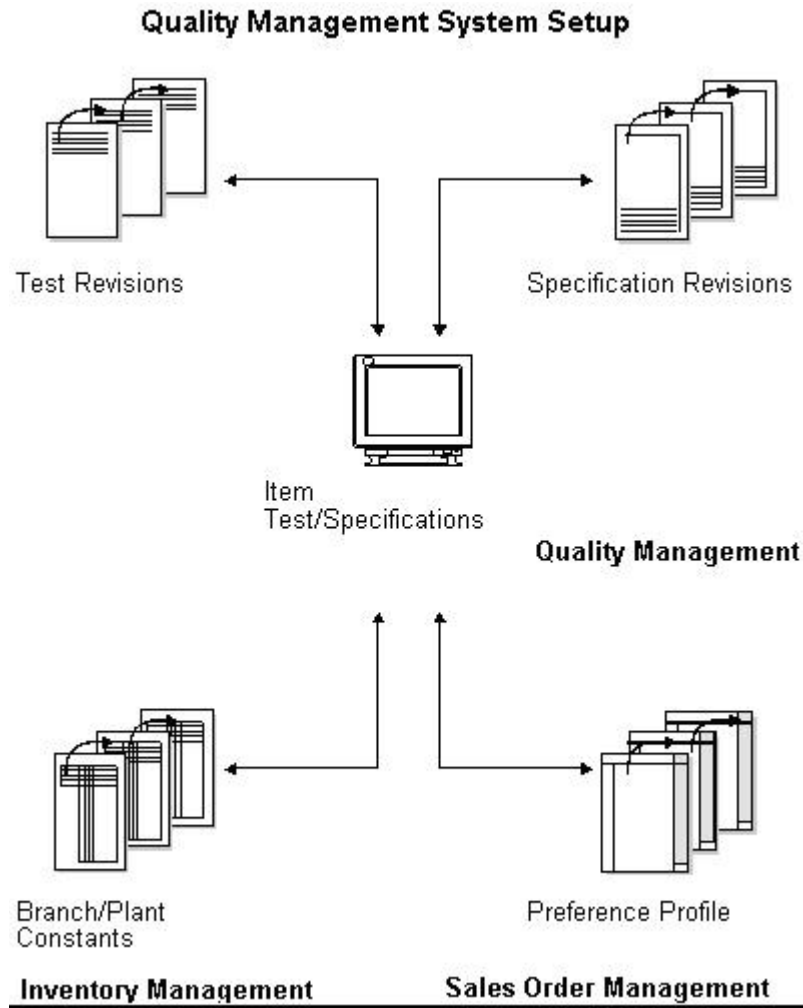
t

****

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

- Setting up branch/plant constants
- Setting up tests
- Setting up specifications
- Setting up preferences
- Setting up inclusion rules for test results (optional)
- Setting up customer billing instructions (optional)

2.2.1 Before You Begin

- Decide which characteristics to test for each item whose quality you want to measure.

3

Set Up Branch/Plant Constants

This chapter contains the topic:

■ Section 3.1, "Setting Up Branch/Plant Constants."

3.1 Setting Up Branch/Plant Constants

Navigation

From Inventory Management (G41), enter 29

From Inventory System Setup (G4141), choose Branch Plant Constants

You must activate the Quality Management system for each branch/plant within which you want to measure an item's quality.

To set up branch/plant constants

On Branch/Plant Constants

Figure 3–1 Branch/Plant Constants screen
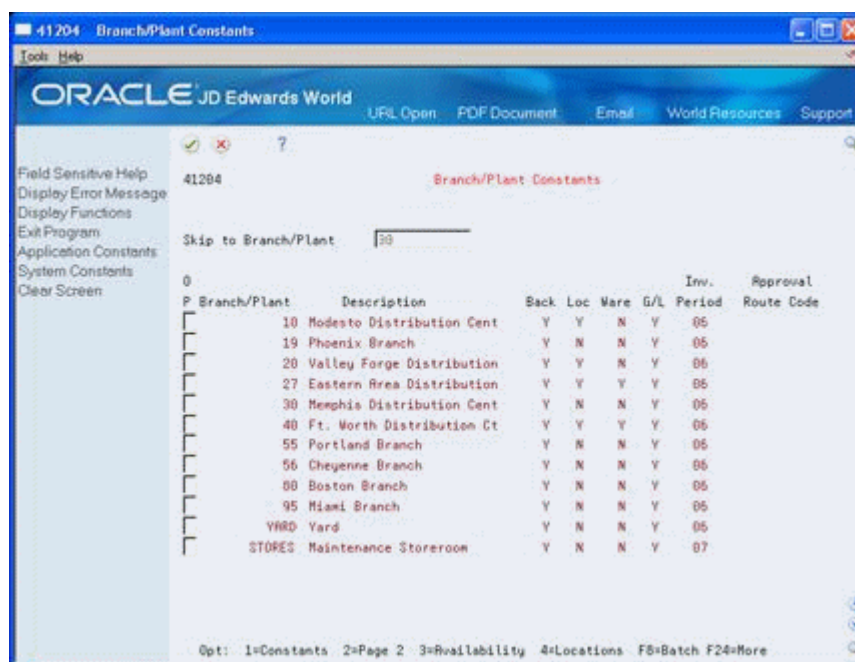
1. To locate a specific branch plant, complete the following field:

- Skip to Branch Plant

2. Choose the Constants option.

Figure 3–2   Branch/Plant Constants screen (Page 1)
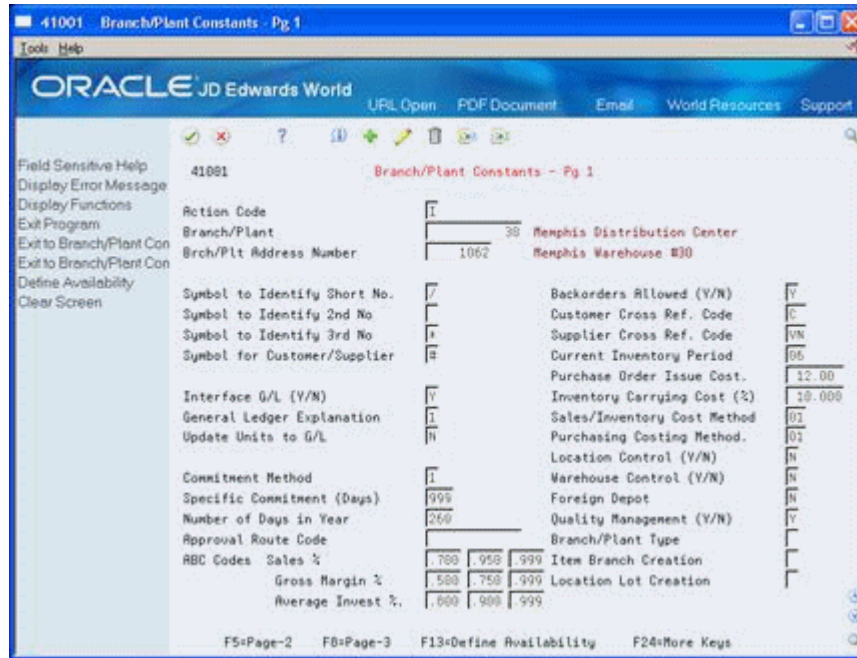
3. On Branch/Plant Constants - Pg 1, complete the following field:

- Quality Management (Y/N)

Field	Explanation
Skip to Branch/Plant	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant.
	You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.
	Form-specific information
	Use the Skip to Branch/Plant field at the top of the form to begin the form display with the branch/plant code you enter.
Quality Management (Y/N)	This flag indicates whether to activate the Quality Management system (System 37) for your branch/plant.

4

Set Up Tests

This chapter contains these topics:

4.1 Setting Up Tests

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

For each test, you can define:

- Description

- How to record results

- Test sample

- How to evaluate the results

- Information to print on the certificate of analysis

- ASTM reference numbers

4.2 Defining Tests

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Test Revisions

When you define a test, you determine which characteristics you want to measure for an item.

Defining tests consists of the following tasks:

- Reviewing tests

- Entering tests

- Entering user-defined codes (optional)

- Entering text

To review tests

Before you enter a test, you can review tests at a branch/plant to ensure that the same one does not already exist.

On Test Revisions

1. Place the cursor on the following field:

   ■ Test ID

2. To search, press F1:

Figure 4–1   Test Specification Search screen
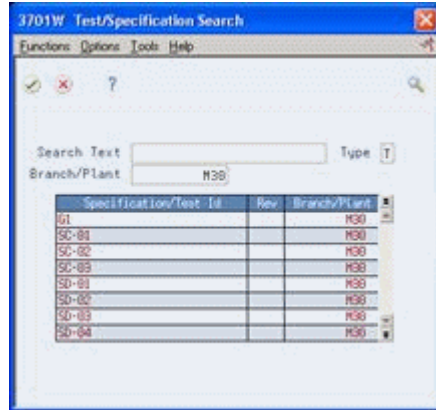
3. On Test/Specification Search, complete the following fields:

   ■ Search Text

   ■ Branch/Plant

   ■ Type

4. To work with a test, use the Select option.

Field	Explanation
Test ID	The unique identification for a test to be performed on an item. For example:
	COL – Color test
	DENS – Density Test
	CL-2 – Clarity Test
Search Text	The unique identification for a set of tests which need to be performed together. For example:
	F-156 - FDA Specification 156
	SP34 - Specification 34
Type	Code used to indicate whether a record within Item/Test Specifications is a test or specification.
	Valid values for entry are:
	T – Test
	S – Specification

To enter tests

On Test Revisions

Figure 4–2   Test Revisions screen

1. To identify the test, complete the following fields:

    ■   Branch/Plant

    ■   Test ID

    ■   Description

    ■   Property

2. To define how to record test results, complete the following fields:

    ■   Test Type

    ■   Numeric (1/0)

    ■   Display Decimals

    ■   Display/Evaluate

    ■   System Code

    ■   User Defined Code

3. To define information about the sample and how to evaluate it, complete the following fields:

    ■   Minimum Value

    ■   Target Value

    ■   Maximum Value

    ■   Number of Samples

    ■   Sample Percentage

    ■   Accept Quantity

    ■   Accept Percentage

    ■   Sample Size

4. To determine the information that prints on the certificate of analysis, complete the following fields:

   ■ Print Test

   ■ Print Text (1/0)

5. To categorize tests into groups, complete the following fields:

   ■ Category Codes 1-5

6. Complete the following optional field which is for information only:

   ■ ASTM Reference

   If you have defined alphanumeric test results, you must identify the results to collect.

Field	Explanation
Description	A brief description of an item, a remark, or an explanation.
Test Type	Controls how the system processes tests as you enter test results. For example:
	R – Required - Result values are required during Results Entry. The system does not allow an item to pass quality inspection until you enter results for each required test.
	O – Optional - Result values are optional during Results Entry. The system allows an item to pass quality inspection regardless of whether you have entered results for each optional test.
	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.
Numeric (1/0)	Determines whether a test result value will be numeric or alphanumeric.
	Valid values are:
	1 – Indicates that the result value is numeric and should be right justified.
	0 – Indicates that the result value is alphanumeric and should be left justified. Tests that are using alphanumeric result values must 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.
Display Decimals	Use this parameter to designate the number of decimals in the currency, amount, or quantity fields the system displays. For example, U.S. Dollars would be 2 decimals, Japanese Yen would be no decimals, and Cameroon Francs would be 3 decimals.

Field	Explanation
Display/Evaluate	A code used to determine whether or not a test will display when viewing test results. Valid values are:
	0 – The test will not display when using Test Results Revisions or result inquiry programs. This value will only be allowed for tests of type G, Guaranteed.
	1 – Display all occurrences of a test when using result inquiry programs. In order to provide for the entry of result values, all occurrences of a test will always display in Test Results Revisions.
	2 – Display only the average result record when using result inquiry programs. Test Results Revisions will always display all occurrences of a test and the average result record.
	3 – Display the last occurrence of a test when using result inquiry programs. The last occurrence will be the test results record that was entered last using Test Results Revisions.
System Code	A user-defined code (98/SY) that identifies a JD Edwards World system.
User Defined Code	Identifies the table that contains user-defined codes. The table is also referred to as a code type.
Minimum Value	The lowest value for the desirable test result.
Target Value	The preferable or target test result within the test results range.
Maximum Value	The highest value for the desirable test result.
Number of Samples	The number of samples to be taken for the test.
Sample Percentage	The percentage of an order quantity that will be used to determine the number of samples to create in Test Result Revisions. For example, if the sample percentage is 50 percent and the order quantity is 10, 5 samples will be created in Test Results Revisions. Use either this field OR number of samples to tell the system how many samples to create.
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 1. To use this accept quantity value, you must complete the following fields on Test Definitions accordingly:
	Display/Evaluate – 1
	Accept Percentage – 0
Sample Size	The quantity of one sample to be taken for the test.
Print Test	A code used to determine whether or not a test will print on the Certificate of Analysis. The valid values are:
	0 – The test will not print on the Certificate of Analysis.
	1 – Print all occurrences of a test on the Certificate of Analysis.
	2 – Print just the average test result record when printing the Certificate of Analysis.
	3 – Print the last occurrence of a test when printing the Certificate of Analysis. The last occurrence will be the test results record that was entered last using Test Results Revisions.

To enter user-defined codes

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

An example of an alphanumeric test result is a color, such as yellow, amber, and orange.

On Test Revisions

1. Choose the User Defined Codes function.

Figure 4–3   User Defined Code Revisions screen
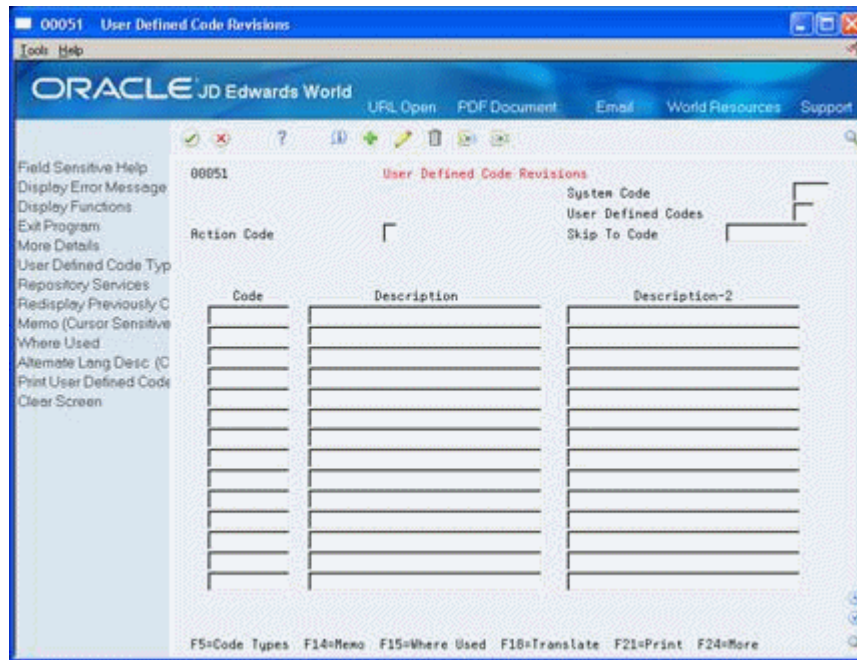
2. On User Defined Code Revisions, complete the following fields:

   ■ System Code

   ■ User Defined Codes

   ■ Code

   ■ Description

   ■ Description-2

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

Field	Explanation
Skip To Code	To begin the information displayed on the form with a specific user-defined code, enter the code in this field.
Code	This column contains a list of valid codes for a specific user-defined code list. The number of characters that a code can contain appears in the column title.
Description	A user-defined name or remark.

To enter text

Use generic text to add instructions related to a specific test such as sampling methods.

On Test Revisions

1. Choose the Memo function.

Figure 4–4   Test Identification Text screen
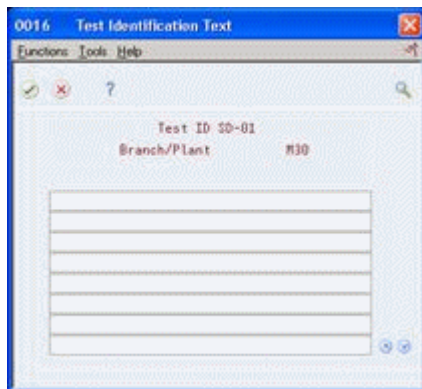
2. On Test Identification Text, type text.

   The message See Memo appears on Test Revisions for tests with generic text.

4.2.1 What You Should Know About

Topic	Description
Import Test Definitions (Release A9.3 Update)	You can use the Test Definitions Master - Z File (P3701Z) program to to create, update, or delete test definitions. P3701Z launches the Test Revisions (P3701) program as a batch program and processes the data from the Test Definitions Z File (F3701Z) into P3701.
	See Appendix B, "Import Mass Data into Quality Management"for more information about Z File processes.

4.3 Reviewing Tests

Navigation

From Quality Management (G37), enter 29

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

Use the Test Where Used program to review the item test specifications that contain a test at a certain branch/plant. Use this information to review and maintain item test specifications across your branch/plants.

To review tests

On Test/Specification Where Used

Figure 4–5 Test/Specification Where Used screen
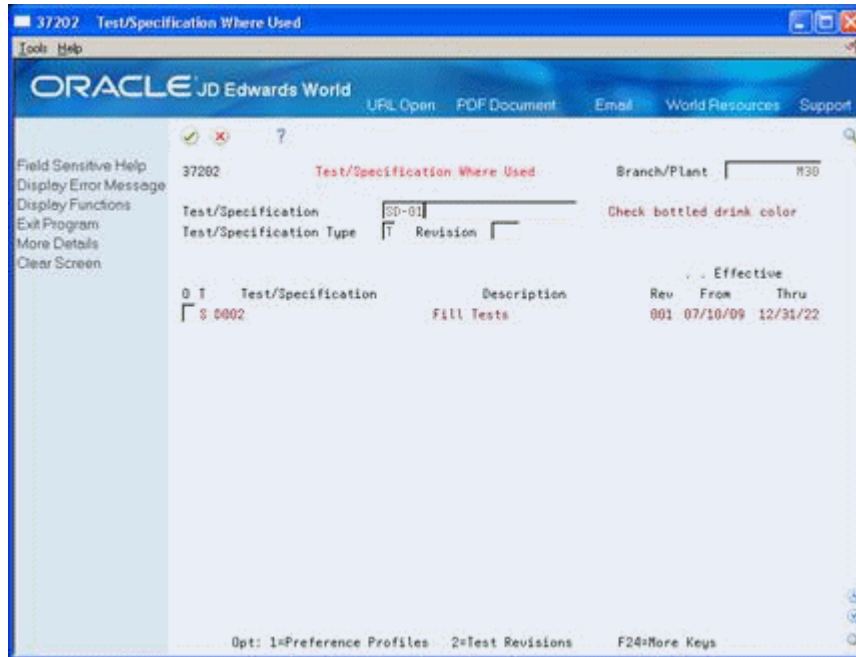
1. To locate a specific test, complete the following fields:

   ■ Branch/Plant

   ■ Test/Specification

2. Enter T in the following field:

   ■ Test/Specification Type

3. Access the detail area (F4).

Figure 4–6 Test/Specification Where Used screen (Detail area)
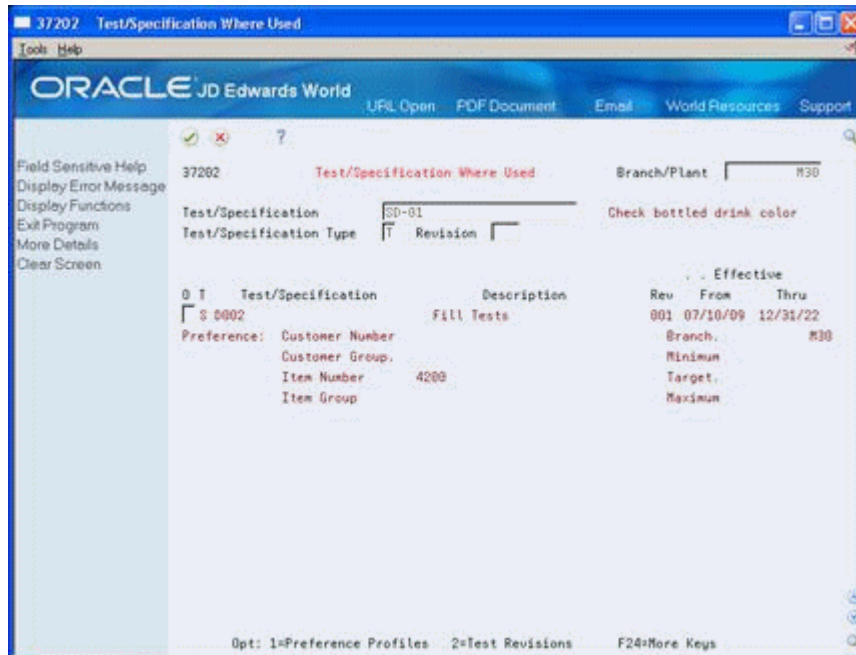
4. Review the following fields:

   ■ Test/Specification Flag

   ■ Description

   ■ Branch

   ■ Customer

   ■ Customer Group

   ■ Item

   ■ Item Group

   ■ Minimum

   ■ Maximum

   ■ Target

4.3.1 What You Should Know About

Topic	Description
Reviewing branch/plants	You can review the tests across all of your branch/plants by entering an asterisk (*) for the branch/plant.

4.4 Printing Tests

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Test Definitions Report

Use the Test Definitions Report program to create a report that includes all the tests for a branch/plant you select. Use this information to review and maintain tests for all of your items.

Figure 4–7   Test Definition report

5

Set Up Specifications

This chapter contains these topics:

- Section 5.1, "Setting Up Specifications,"
- Section 5.2, "Defining Specifications,"
- Section 5.3, "Reviewing Specifications,"
- Section 5.4, "Printing Specifications."

5.1 Setting Up Specifications

You should group tests that will always be performed at the same time into a specification. Specifications can be unique to a branch/plant or common across all branch/plants.

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

For each specification, you can define:

- Name and description
- Revision levels
- Effectivity dates
- Which tests to include in the specification

5.2 Defining Specifications

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Specification Revisions

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

Defining specifications consists of the following tasks:

- Entering specifications
- Locating revision levels
- Entering text
- Locating specifications

To enter specifications

On Specification Revisions

Figure 5–1   Specification Revisions screen
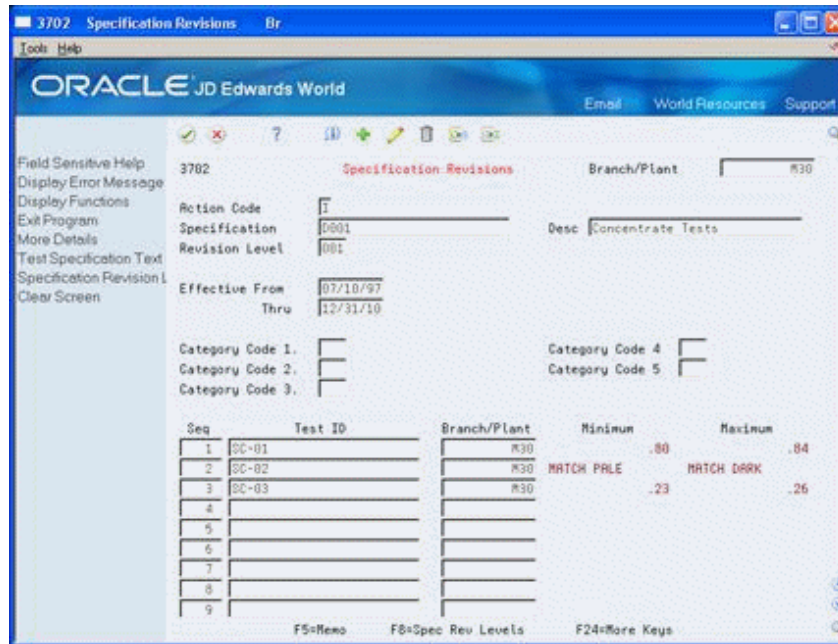
1. To identify the specification, complete the following fields:

    ■   Branch Plant

    ■   Specification

    ■   Description

    ■   Revision Level

2. To define the specification's range of effectivity, complete the following fields:

    ■   Effective From

    ■   Effective Thru

3. To categorize specifications into groups, complete the following fields:

    ■   Category Codes 1-5

4. To group the tests and other specifications, complete the following fields:

    ■   Test

    ■   Branch Plant

    After you enter a specification, you can review revision levels for that specification.

Field	Explanation
Revision Level	The revision level of the specification.

Field	Explanation
Effective From	A date that indicates one of the following:
	■ When a component part goes into effect on a bill of material
	■ When a routing step goes into effect as a sequence on the routing for an item
	■ When a rate schedule is in effect
	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 Control, 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	A date that indicates one of the following:
	■ 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 Control, 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.
Category Code 1	One of five reporting codes that can be assigned to each specification defined. Use these codes to categorize specifications into different groups. Category codes are user defined (System 37, types S1 through S5).
	Examples:
	Category code S1 - Specification Group
	Category code S2 - FDA Code

To locate revision levels

A revision level is an alphanumeric character that represents the number of times a specification has changed. To avoid overlapping revisions, the system verifies that the start dates of revisions are not greater than the end date for other revisions.

On Specification Revisions

1. Choose the Specification Revision Levels function.

Figure 5–2   Specification Selection screen
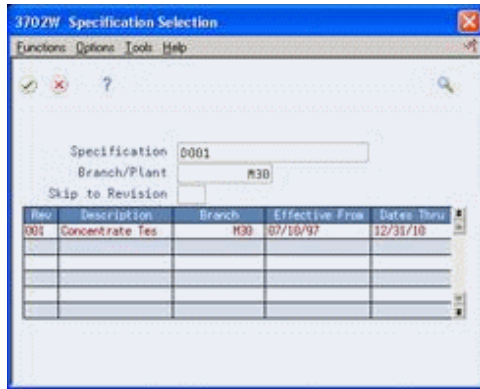
2. On Specification Selection, review the following fields:

   ■ Revision Level

   ■ Effective From

   ■ Effective Thru

   ■ Branch Plant

3. To work with a revision level, choose the Select option.

   After you locate revision levels, you can enter text for the specification.

To enter text

On Specifications Revisions

1. Choose the Memo function.

Figure 5–3   Test Specification Text screen
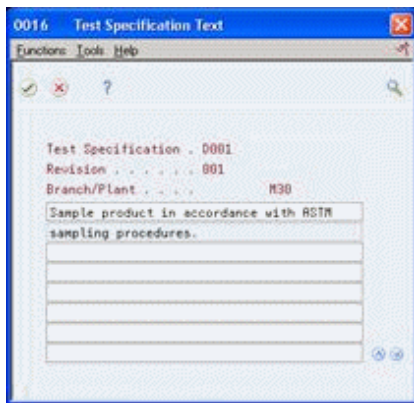
2. On Test Specification Text, type instructions.

   The message See Memo appears on Specification Revisions for specifications with text. After you enter text, you can locate all specifications for a branch/plant.

To locate specifications

On Specification Revisions

1. Place the cursor on the following field:

   ■ Specification

2. To search, press F1:

Figure 5–4   Test/Specification Search screen
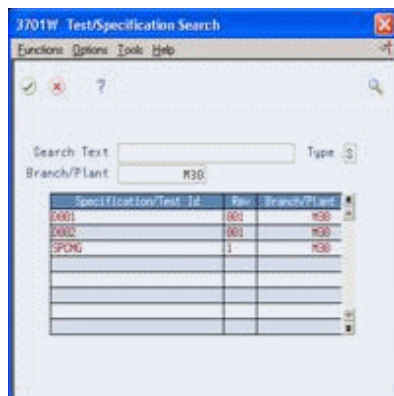
3. On Test/Specification Search, review the following fields:

- Specification/Test ID
- Revision
- Branch/Plant

4. To work with a specification, choose the Select option.

5.2.1 What You Should Know About

Topic	Description
Import Test Specifications (Release A9.3 Update)	You can use the Test Specification - Z File (P3702Z) program to create, update, or delete test specification definitions. P3702Z launches the Specification Revisions (P3702) as a batch program and processes the data from the Specifications Definition Header Z (F3702HZ) and Specifications Definition Detail Z (F3702DZ) files into P3702.
	See Appendix B, "Import Mass Data into Quality Management"for more information about Z File processes.

5.3 Reviewing Specifications

Navigation

From Quality Management (G37), enter 29

**From Quality Management Setup (G3741), choose Test/Specification Where Used**

Use the Test/Specification Where Used program to review where specifications are used within your branch/plants.

To review specifications

On Test/Specification Where Used

Figure 5–5   Test/Specification Where Used screen
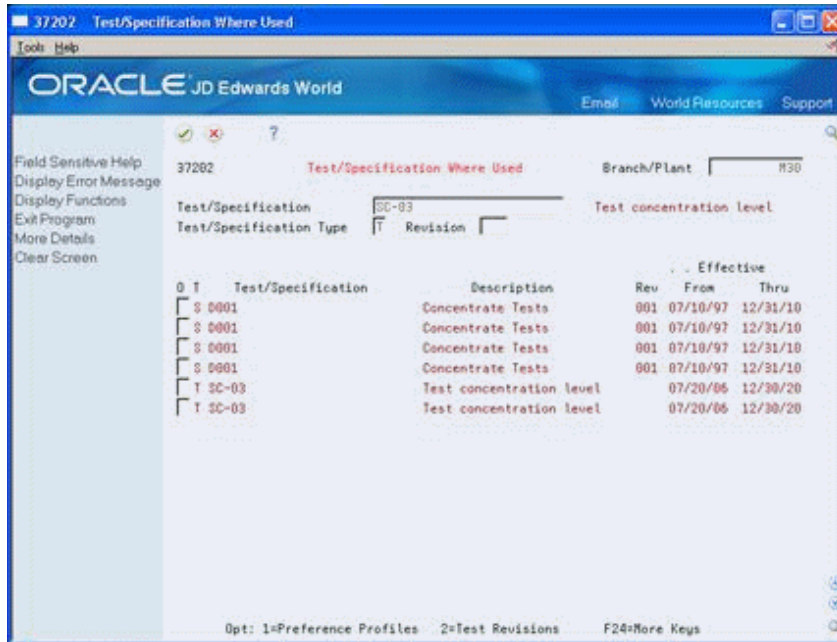
1. To locate a specification, complete the following fields:

    ■   Branch/Plant

    ■   Test/Specification

    ■   Revision

2. Enter S in the following field:

    ■   Test/Specification Type

3. Access the detail area (F4).

Figure 5–6   Test/Specification Where Used (Detail) screen
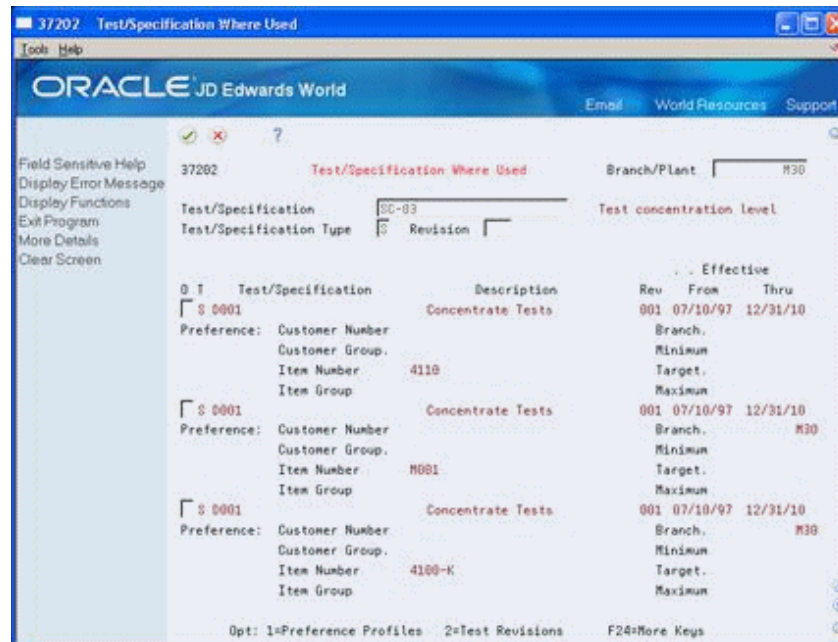
4. Review the following fields:

    ■ Test/Specification Flag

    ■ Description

    ■ Revision Level

    ■ Effective From

    ■ Effective Thru

    ■ Customer Number

    ■ Customer Group

    ■ Item Number

    ■ Item Group

    ■ Branch

    ■ Minimum

    ■ Maximum

    ■ Target

5.4 Printing Specifications

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Specifications Report

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

Figure 5–7   Test Specification Report

6

Set Up Preferences

This chapter contains these topics:

6.1 Setting Up Preferences

You can use preferences to customize Quality Management to meet your specific business requirements. Typically, you create preferences when you have consistent business requirements, such as:

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

In Quality Management, you can use a type of preference called an item test specification to customize tests and specifications for any combination of customer, customer group, item, or item group. The system uses a preference hierarchy to determine which test to use for which combination. This information is used to control your access to Quality Management forms from other systems.

An example of a preferences used in Quality Management is a customer who requires a variety of tests or customized tests for an item when it is received from a supplier.

6.1.1 Before You Begin

- Review Preference Profiles in the *JD Edwards World Sales Order Management - ECS Guide*

6.2 Defining Item Test Specifications

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Preference Profiles

After you define tests and specifications, you can define which tests and specifications to perform for a specific customer, customer group, item, or item group. For each item, you can review its range of tests. For each customer, you can review its unique specifications.

You must indicate when to enter test results for each item test specification. For example, to enter test results during Work Order Inventory Completions, you would activate the Manufacturing Operations option. You can also determine when test results appear at an operation sequence. You do not have to activate all of the programs, but you must activate at least one program.

Defining item test specifications consists of the following tasks:

- Defining preferences
- Expanding a specification

To define preferences

On Preference Profiles

1. Choose the Quality Management option.

Figure 6–1 Quality Management screen
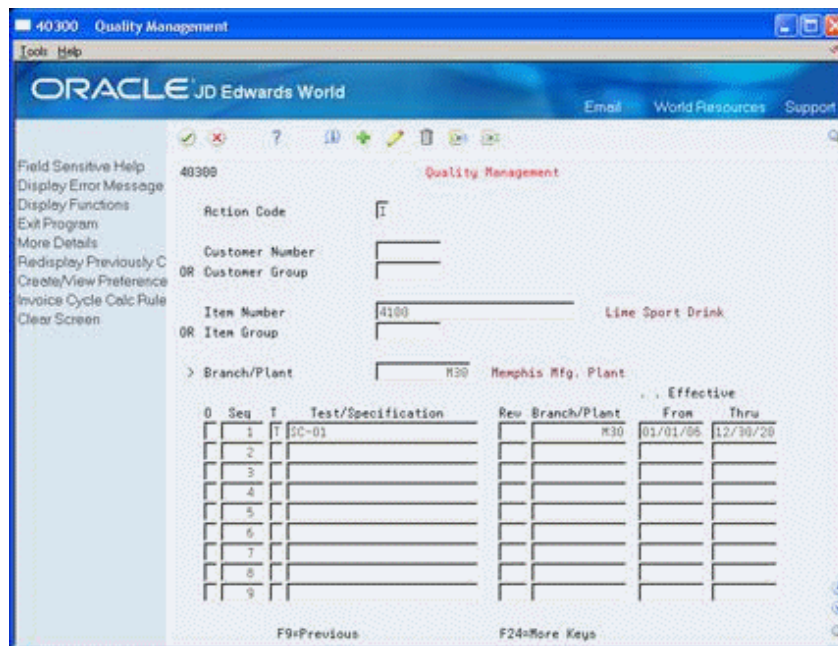
2. On Quality Management, complete one of the following fields to define a specification for a customer:

   - Customer Number
   - Customer Group

3. To define a specification for an item, complete the following fields:

   - Item Number
   - Item Group
   - Branch/Plant

4. To determine the tests and specifications that make up the item test specification, complete the following fields:

   ■ Test Sort Sequence Number

   ■ Test/Specification Flag

   ■ Test/Specification

   ■ Specification Revision

   ■ Branch/Plant

   ■ Effective From

   ■ Effective Thru

5. Access the detail area.

Figure 6–2 Quality Management (Detail) screen

6. To override testing and sampling information from the original test definition, complete the following fields:

   ■ Test Type

   ■ Minimum

   ■ Target

   ■ Maximum

   ■ Print Test

7. To specify from which programs to enter test results, complete the following fields:

   ■ Manufacturing Operations

   ■ Operation Sequence

   ■ Routing Type

   ■ Manufacturing Receipt Routing

- Sequence Number - Operations

- Manufacturing Completions

- Purchasing Receipts

- Purchasing Receipt Routing

- Bubble Sequence

- Ship Confirm

- Load and Delivery

To expand a specification

You can expand specification to view its corresponding groups of tests and lower level specifications.

On Preference Profiles

1. Choose the Quality Management option.

Figure 6–3   Quality Management (Expand Specification) screen
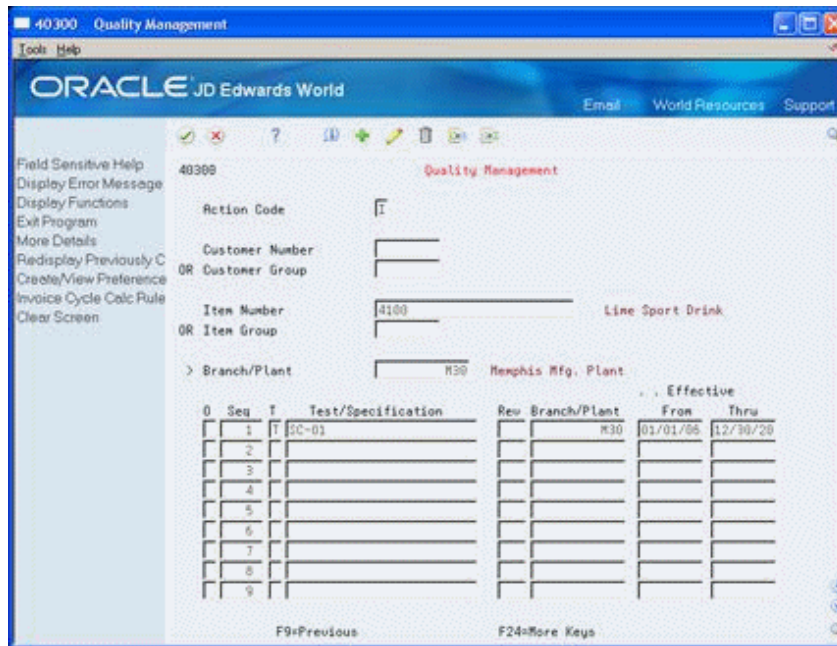
2. On Quality Management, complete one of the following fields to locate an item test specification that contains a lower level specification:

- Customer Number

- Customer Group

- Item Number

- Item Group

- Branch/Plant

3. For a specification, choose the Split Specification option and press Enter.

4. Locate the item test specification and review the separate tests that replace the specification.

Figure 6–4   Quality Management (Review Test Specification) screen

Field	Explanation
Customer Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.
	Form-specific information
	Enter an address number when you want to define a preference for a specific customer. The preference can be for the customer alone, or a combination of the customer and an item or item group.
	If you leave both the Customer Number and Customer Group fields blank, the system applies the preference to all customers.
	For Agreement Penalty Schedules:
	Enter the partner's address number.
Customer Group	User defined code (system 40, type 18) identifying a group to which you can assign customers for the Item/Test Specifications. Do this when the customers are similar and you want to group them together to define preferences quickly and easily.
	Enter the code that identifies the customer group for which you want to define a preference. You can define the preference for this group alone or for a combination of customer group and item or item group.
	If you leave both the Customer Number and the Customer Group fields blank, the system applies the preference to all customers.

Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
	Form-specific information
	Enter the number of the item for which you want to define a preference. You can define the preference for the item only or for the item and a customer or customer group.
	If you leave both the Item Number and Item Group fields blank, the system applies the preference to all items.
Item Group	Item types that an item can be grouped into for each of the different preference types.
Seq	A number used to determine the sort order of tests and specifications within Item/Test Specifications.
Manufacturing Operations	Controls whether a test will display on the Test Results Revision form when you access test results from any of the following Manufacturing programs:
	■ Co/By Product Completions (P31115)
	■ Super Backflush (P31123)
	■ Work Order Employee Time Entry (P311221)
	Valid values are:
	1 – The test will appear in Test Results Revisions.
	0 – The test will not appear in Test Results Revisions.
	You can use this value with the operation sequence and routing type to control the appearance of the test at an operation or routing type.
Sequence Number - Operations	In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.
	In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.
	In engineering change orders, this number is used to sequence the assembly steps for the engineering change.
	Skip To fields allow you to enter an operation sequence that you want to begin the display of information.
	You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.
Type of Routing	User defined code (system 40, type TR) that designates the type of routing. You can define different types of routing instructions for different uses.
	For example:
	M – Standard Manufacturing Routing
	RWK – Rework Routing
	RSH – Rush Routing
	You define the routing type on the work order header. The specific type of routing defined will then be used in the work order routing.
	Product Costing and Capacity Planning systems use only M type routings.

Field	Explanation
Manufacturing Receipt Routing	Controls whether a test will display on the Test Results Revision form when you access test results from the Routing Movement and Disposition (P43250) program when the routed order is a manufacturing work order. Valid values are: 1 – The test will appear on Test Results Revisions. 0 – The test will not appear on Test Results Revisions. You can use this value with the operation sequence to control the appearance of the test at a route operation.
Sequence Number - Operations	The sequence in which the system performs the operations or steps of the route.
Manufacturing Completions	Controls whether the test will display on the Test Results Revision form when you access test results from either of the following Manufacturing programs: ■ Work Order Inventory Completions (P31114) ■ Completions Workbench (P3119) Valid values are: 1 – The test will appear on Test Results Revisions. 0 – The test will not appear on Test Results Revisions.
Purchasing Receipts	Controls whether a test will display on the Test Results Revision form when you access test results from either Receipts by P/O or Receipts by Item (P4312). Valid values are: 1 – The test will appear in Test Results Revisions. 0 – The test will not appear in Test Results Revisions.
Purchasing Receipt Routing	Controls whether the test will display on the Test Results Revision form when you access test results from Routing Movement and Disposition (P34250) and the routed order is a purchase order. Valid values are: 1 – The test will appear on Test Results Revisions. 0 – The test will not appear on Test Results Revisions. You can use this value with the operation sequence to control the appearance of the test at an operation.
Sequence - Bubble Sequence	A secondary bill of material sequence number to indicate the drawing bubble number.
Ship Confirm	Controls whether the test will display on the Test Results Revision form when you access test results from the Ship Confirmation (P4205) program. Valid values are: 1 – The test will appear on Test Results Revisions. 0 – The test will not appear on Test Results Revisions.
Bulk Confirm	Controls whether the test will display on the Test Results Revision form when you access test results from either Bulk Confirm by Order or Bulk Confirm by Trip (P49510). Valid values are: 1 – The test will appear on Test Results Revisions. 0 – The test will not appear on Test Results Revisions.

6.2.1 What You Should Know About

Topic	Description
Accessing item test specifications	You can access Quality Management item test specifications from the following screens:
	■ Test Results Revisions
	■ Bill of Material Revisions
	■ Item Branch/Plant Information

6.3 Entering Text

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Preference Profiles

After you enter an item test specification, you can attach text that provides additional detail. For example, you might want to explain sample collection methods and tools.

To enter text

On Quality Management

1. Choose the Memo function.

Figure 6–5   Preference Text screen
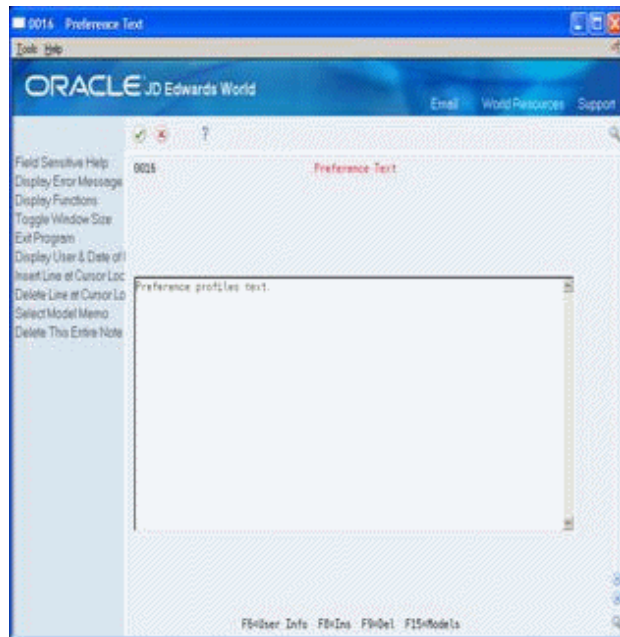
2. On Preference Text, type text.

The message See Memo appears for item test specifications with text.

6.4 Printing Item Test Specifications

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Item Test Specifications

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

6.4.1 Processing Options

See Section 12.1, "Item Test/Specification Report (P37420)."

6.5 Example: Item Test Specification Report

Figure 6–6   Item Test/Specification Report

Figure 6–7   Customer Detail

7

Set Up Inclusion Rules for Test Results

This chapter contains the topic:

-

7.1 Setting Up Inclusion Rules for Test Results

Navigation

From Quality Management (G37), enter 29

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

Before you print certificates of analysis and trace test results, you must set up inclusion rules. These rules enable you to limit the Item Ledger transactions that the system processes when tracing the test results for linked lots.

The system traces a lot by associating corresponding transactions, such as a receipt, an issue, a completion, and a sales order. If you do not associate the documents, the system stops tracing. For example, if you do not include the completion document type in inclusion rules, the system stops tracing at the completion transaction.

To set up inclusion rules for test results

On Test Results Inclusion Rules

Figure 7–1 Test Inclusion Rules screen
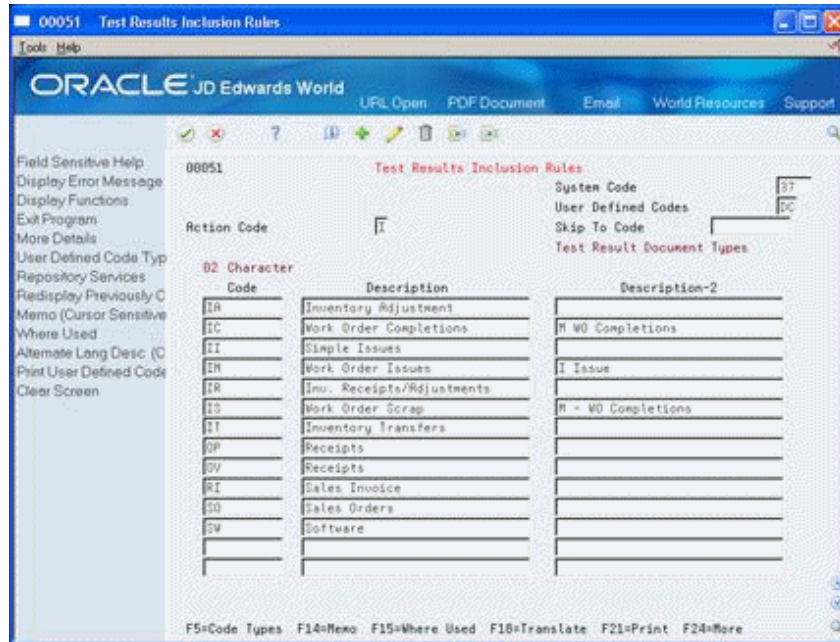
1. For each document type, complete the following fields:

   ■ 02 Character Code

   ■ Description

2. To limit Item Ledger transaction processing, enter the M document type in the following field:

   ■ Description 2

8

Set Up Customer Billing Instructions

This chapter contains the topic:

- Section 8.1, "Setting Up Customer Billing Instructions."

8.1 Setting Up Customer Billing Instructions

Navigation

From Sales Order Management (G42), choose Customer Revisions

From Customer Revisions (G4221), choose Customer Master Information

If you use JD Edwards World' Sales Order Management system, you must use customer billing instructions to indicate which customers should receive a certificate of analysis.

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

8.1.1 Before You Begin

- Ensure that you have set up tests with the appropriate Print Test Flags to control which tests print on the certificate of analysis. See Section 4.2, "Defining Tests."

    See Also:

    - Section 11.8, "Printing a Certificate of Analysis."

To set up customer billing instructions

From the Customer Revisions menu (G4221) in Sales Order Management, choose Customer Master Information. Press F13.

On Billing Instructions:

Figure 8–1 Billing Instructions screen
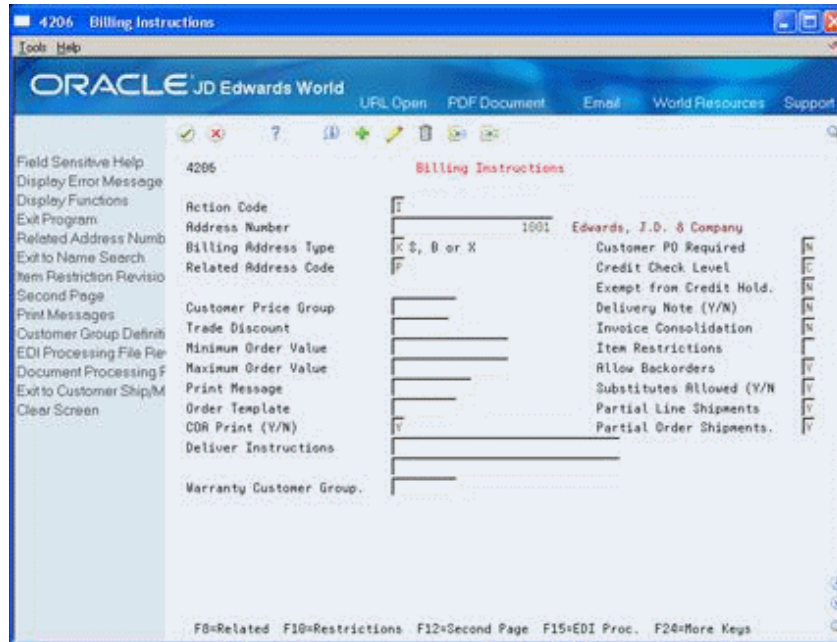
1. To locate a specific customer, complete the following field:

    ■ Address Number

2. Complete the following field:

    ■ COA Print (Y/N)

Field	Explanation
COA Print	Code that is used to indicate that a Certificate of Analysis (COA) will print for the customer. Valid values are:
	Y – to allow the printing of the COA
	N – to prevent a COA from printing for a specific customer when the 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 COA is created.

Part II

Test Results

This part contains these chapters:

- Chapter 9, "Overview to Test Results,"
- Chapter 10, "Work with Test Results,"
- Chapter 11, "Review Test Results."

9

Overview to Test Results

This chapter contains these topics:

- Section 9.1, "Objectives,"
- Section 9.2, "About Test Results."

9.1 Objectives

- To enter test results during Manufacturing, Distribution, and ECS processing
- To review and analyze test results
- To print test results and certificates of analysis

9.2 About Test Results

After you set up the Quality Management system, you can collect, enter, and review test results for an item.

An example of a test result is 0.20 percent syrup result for a sample of a soft drink being tested for syrup concentration.

You can work with test results during your manufacturing and distribution business cycles at the following points:

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

In addition, you can work with test results from the Quality Management menu.

The following graphic illustrates from which programs you can access Quality Management information:

Figure 9–1 Programs to Access Quality Management

Work Order Entry

Receipts by P/O
Item/Account

Procurement

Work Order
Routing
Instructions

Routing Movement/Status

**Shop
Floor
Control**

Work Order
Completions

Test Results Revisions

Ship Confirmation

Super
Backflush

Distribution

Work Order
Employee
Time Entry

Load and
Delivery
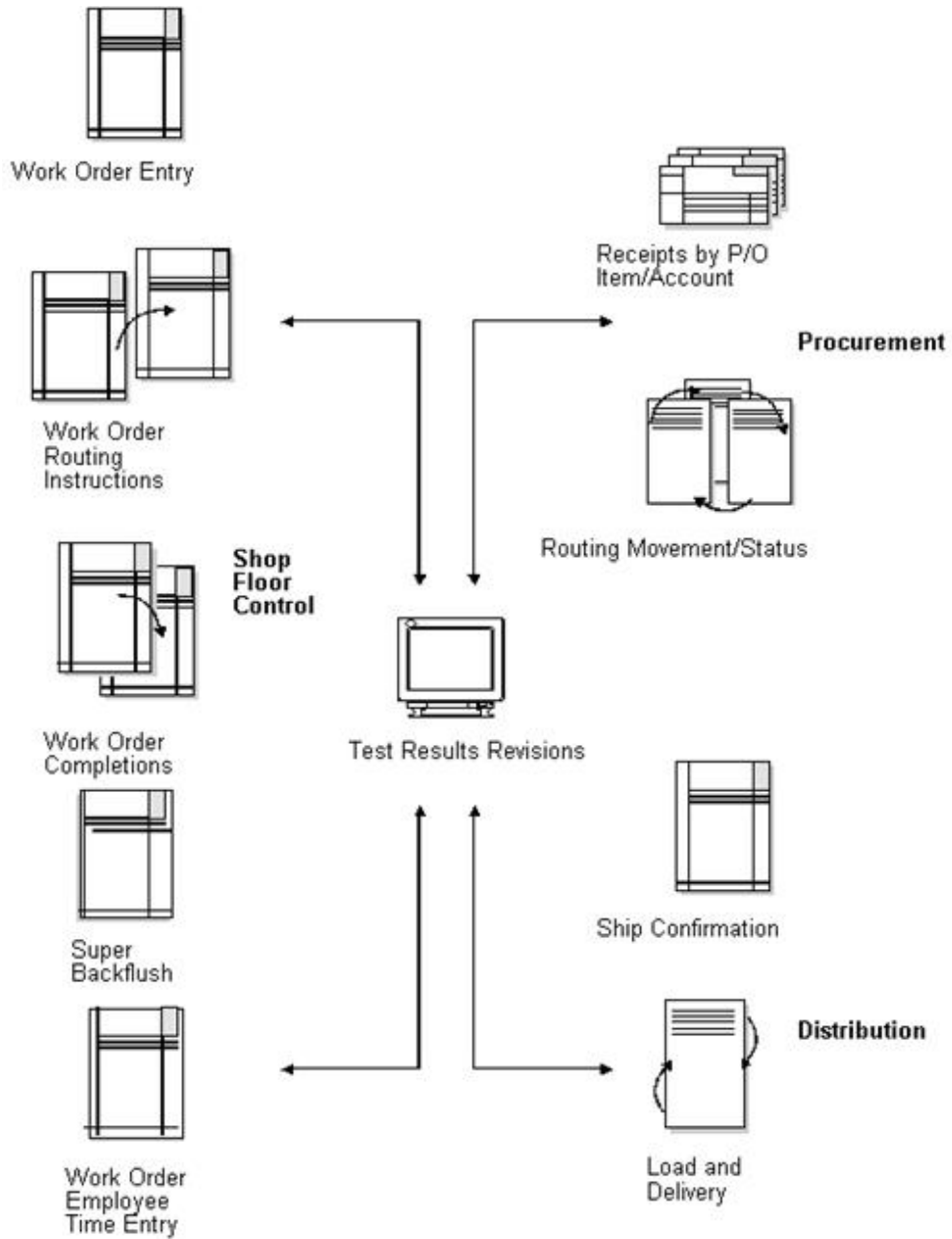
Working with test results consists of the following tasks:

- Working with test results
- Reviewing test results

10

Work with Test Results

This chapter contains these topics:

10.1 Working with Test Results

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

After you collect and enter the test results at the various points in your business cycle, you process the test 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. If you are using lot control, the system evaluates the lot to determine whether it passes or fails quality inspection based on how many samples pass or fail. The system then sets the lot status to the value that you defined in the processing option for failed lot status.

Test Results Revisions (P3711) supports import/export functionality. See the *JD Edwards World Technical Tools Guide* for more information.

10.2 Entering Test Results

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Test Results Revisions

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.

The format of Test Results Entry varies, depending on two factors:

- From which program you accessed Test Results Entry

- Whether you set a processing option to specify an entry mode

The three entry modes of Test Results Entry include:

Mode	Description
Preference profile mode	Organizes test result information by customer, customer group, item, or item group.
Order entry mode	Organizes test result information by work order or sales order number.
ECS mode	Organizes test result information by trip number and depot.

10.2.1 System Integration

Depending on how you set up item test specifications, you can access Test Results Revisions from the following programs:

- Shop Floor Workbench
- Work Order Routing
- Work Order Inventory Completions
- Co-By Product Completions
- Work Order Hours and Quantities Entry
- Rate Schedule Workbench
- Sales Order Confirm
- Purchase Order Receipts
- Move and Disposition
- Trip Create/Maintenance
- Load and Delivery Confirmation

Entering test results consists of the following tasks:

- Entering test results (preference profile mode)
- Entering test results (order entry mode)
- Entering test results (ECS mode)

10.2.2 Before You Begin

- Set the processing option to determine the test results entry mode.

To enter test results (preference profile mode)

You can collect samples and perform tests at any point in your business cycle that you've defined in an item test specification.

On Test Results Revisions

Figure 10–1 Test Results Revisions screen

1. Perform the test on an item's sample.

2. To identify the item test specification for which the test was defined, review the following fields:

   ■ Branch/Plant

   ■ Lot/SN

   ■ Location

   ■ Customer/Supplier

   ■ Customer Group

   ■ Customer Type

   ■ Item Number

   ■ Item Group

3. Access the detail area (F4).

Figure 10–2   Test Results Revisions (Detail) screen
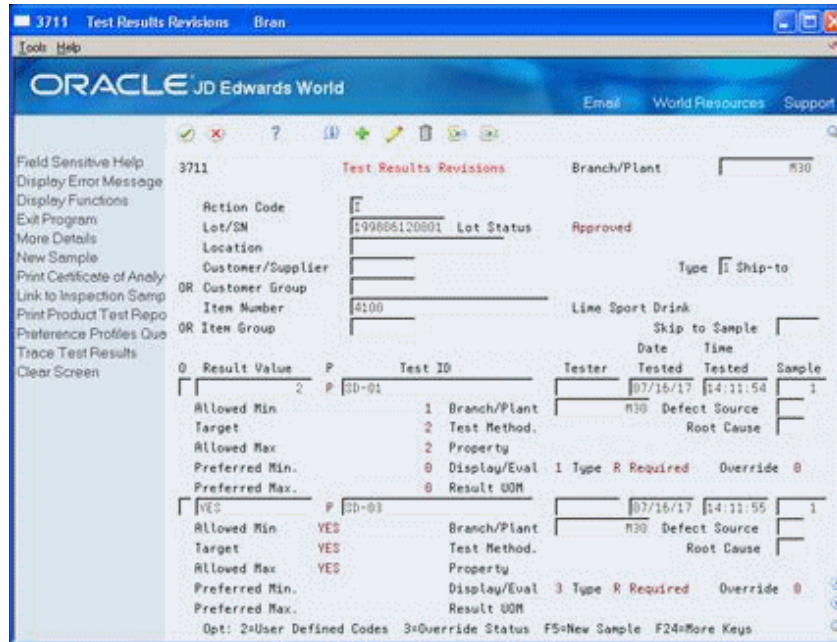
4. Complete the following fields with test result information:

    ■ Result Value

    ■ Tester

    ■ Test ID

    ■ Branch/Plant

    ■ Defect Source

    ■ Root Cause

    The system completes the following fields with information from the test:

    ■ Description

    ■ Minimum

    ■ Target

    ■ Maximum

    ■ Date Tested

    ■ Time Tested

    ■ Test Type

    You can also enter tests at any time on blank lines. After you enter test results, you should evaluate the lot against passed and failed tests.

Field	Explanation
Lot/SN	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics. If System Constants are set to not allow duplicate lots, the item number will default in from the lot master. If duplicate lots are allowed, you will need to enter both the lot or serial number and the item number.

Field	Explanation
Result Value	The result of the performed test.
Tester	The address book number of the person who originated the change request.
Date Tested	The date on which the test was performed.
Time Tested	The time at which the test was performed.
Defect Source	The reason for an item testing failure during an assembly sequence.
Root Cause	The type of test during which an item failure is noted.

To enter tests results (order entry mode)

On Test Results Revisions

Figure 10–3   Test Results Revisions (Order Entry Mode) screen
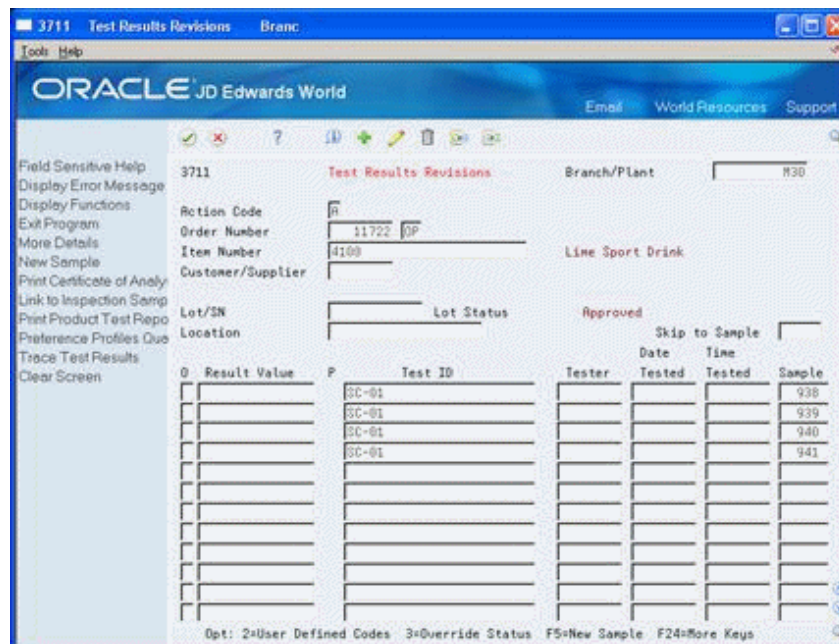
1. Perform the test on an item's sample.

2. To identify the item test specification for which the test was defined, review the following fields:

   ■ Branch/Plant

   ■ Order Number

   ■ Item Number

   ■ Lot/SN

   ■ Lot Status

3. Access the detail area (F4).

Figure 10–4 Test Results Revisions (Order Entry Mode, Detail) screen
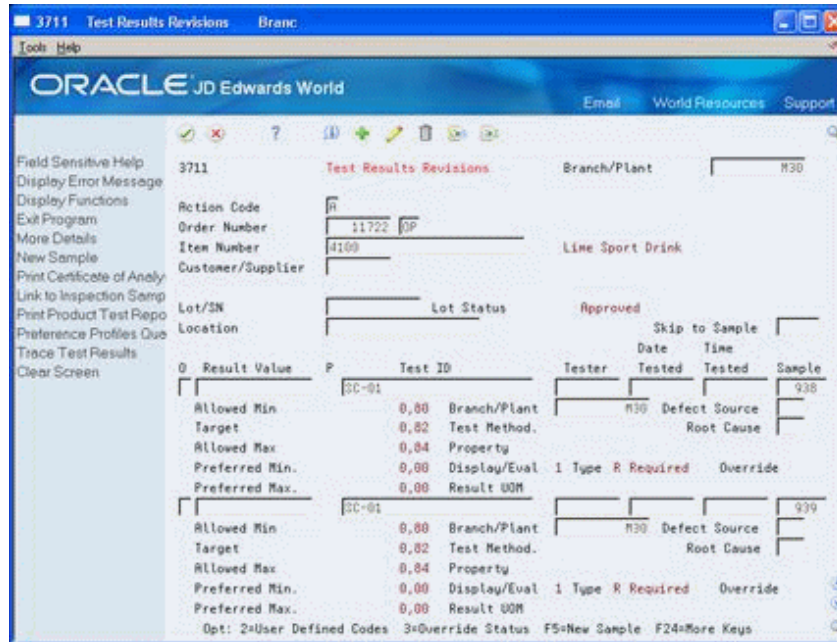
4. Complete the following fields with test result information:

   ■ Result Value

   ■ Tester

   ■ Test ID

   ■ Branch/Plant

   ■ Defect Source

   ■ Root Cause

   The system completes the following fields with information from the test:

   ■ Description

   ■ Minimum

   ■ Target

   ■ Maximum

   ■ Date Tested

   ■ Time Tested

   ■ Test Type

   You can also enter tests at any time on blank lines. After you enter test results, you should evaluate the lot against passed and failed tests.

To enter tests results (ECS mode)

On Test Results Revisions

Figure 10–5   Test Results Revisions (ECS Mode) screen

1. Perform the test on an item's sample.

2. To identify the item test specification for which the test was defined, review the following fields:

    ■   Trip Depot

    ■   Trip Number

    ■   Item Number

    ■   Compartment

    ■   Load Data

    ■   Vehicle ID

    ■   Registration/License Number

3. Access the detail area (F4).

Figure 10–6   Test Results Revisions (ECS Mode, Detail) screen
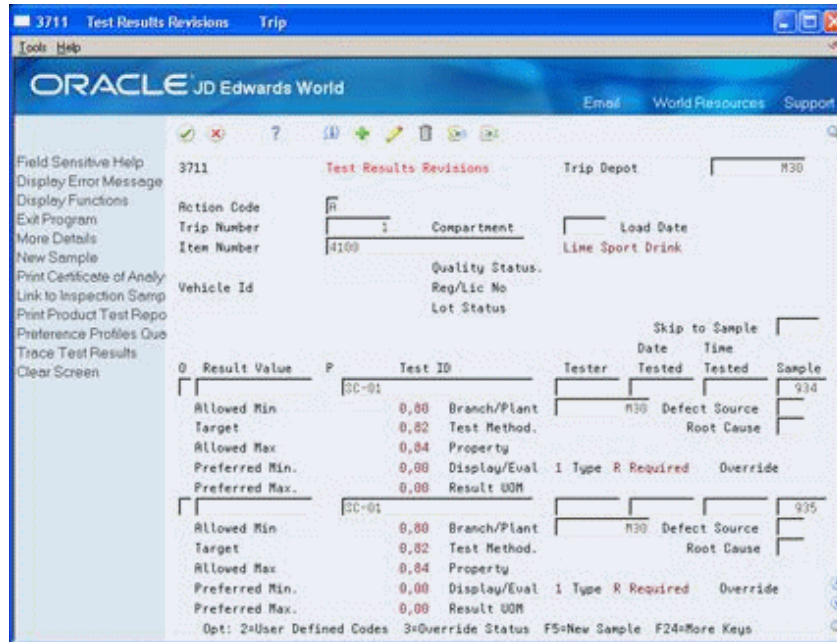
4. Complete the following fields with test result information:

   ■ Result Value

   ■ Tester

   ■ Test ID

   ■ Branch/Plant

   ■ Defect Source

   ■ Root Cause

   The system completes the following fields with information from the test:

   ■ Description

   ■ Minimum

   ■ Target

   ■ Maximum

   ■ Date Tested

   ■ Time Tested

   ■ Test Type

   You can also enter tests at any time on blank lines. After you enter test results, you should evaluate the lot against passed and failed tests.

10.2.3 What You Should Know About

Topic	Description
Work Order Completions	As you enter work order completions, including quantity completed and quantity scrapped, you can: ■ Access Test Results Entry for any items requiring testing upon completion. ■ Review work order generic text. ■ Set processing options for default lot, work order and operation statuses.
Super Backflush	As you backflush labor and material for a work order, you can: ■ Access Test Results Entry for any items that require testing. ■ Review generic text for the parent item and operations.
Hours and Quantities	As you charge actual hours and quantities to a work order, you can: ■ Access Test Results Entry for completed items that require testing. ■ Access generic text for the parent item. ■ Set processing options for default lot, work order and operation statuses.
Process Work Orders	As you process work orders, you can use processing options to set values for the status of the work order and operation lot if the tests fail.
Bill Revisions	As you maintain bills of material, you can use generic text to indicate the various tests to perform on an item.
Receipts by PO/Item/Account	As you receive items, you can access Test Results Entry for items that require testing.
Routing Receipts	As you review the location of goods within the receipts routing process and move them to another operation, you can access Test Results Entry for items that require testing.
Import Test Results (Release A9.3 Update)	You can use the Test Results - Z File (P3711Z) program to create, update, or delete specification definitions. P3711Z launches the Test Results Revisions (P3711) program as a batch program and processes the data from Test Results Header Z (F3711HZ) and Test Results Detail Z (F3711DZ) files into P3711. See Appendix B, "Import Mass Data into Quality Management"for more information about Z File processes.

10.3 Entering Text

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Test Results Revisions

After you've entered test results, you can enter text for those test results such as the measuring equipment that you used. This text prints on the certificate of analysis.

To enter text

On Test Results Revisions

1. For a test, choose the Generic Text option.

Figure 10–7   Test Results Revisions Text screen

2. Type the text.

10.4 Processing Test Results

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Test Results Revisions

As you enter test results, the system processes them to determine if the results you collected pass the tests that you defined. The system compares the test results against minimum and maximum values, and sets the Pass/Fail flag accordingly for each test.

After the system evaluates the tests, if you are using lot control you must use the evaluate function to set the entire lot's status to fail if any of the tests have a failed result. If all the tests have a passing value, the system sets the lot status to pass. You can set both the pass and fail lot statuses with processing options.

> **Note:**   A failed test result value will not limit transactions except for those tests you have defined as required for the ECS Bulk Load Confirm program.

Processing test results consists of the following tasks:

- Processing test results
- Revising a test status

To process test results

On Test Results Revisions

Choose the Evaluate function.

The system completes the following field accordingly:

■   Lot Status

If the status has failed, you can override it by revising the test results.

Field	Explanation
Lot Status	A user defined code (table 41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold.
	You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.

10.4.1 What You Should Know About

Topic	Description
Evaluating ECS tests	The test type on Test Definitions determines whether you enter test results during Bulk Load Confirm. If a test is required, the Bulk Confirm process stops until you enter test results and they pass. If a test is optional, a warning message appears, however you can finish the Bulk Confirm process. If a test is guaranteed, you can finish the Bulk Confirm process and no warning message appears.
Accept Quantity	The evaluation process uses the Acceptable Quantity on Test Definitions as the number of tests that must pass in order for the entire lot to pass quality.
Accept Percentage	The evaluation process uses Acceptable Percentage on Test Definitions as the percentage of tests that must pass in order for the lot to pass quality.
Creating non-conforming records	You can also use this program to write failed tests to the Non-Conforming Material file (F3703) and generate a report detailing the failed tests.
Incomplete testing	The message Testing Incomplete appears if you do not enter test results for all the tests defined for the item test specification.

To revise a test status

You can change the status of failed tests. You should use action code security to secure this function so all users can review the status, but only users with correct authority can change the status. Consider attaching a memo to explain why you changed a test's status.

On Test Result Revisions

1.   For the failed test result, choose the Override Status option.

Figure 10–8   Test Status Revisions screen
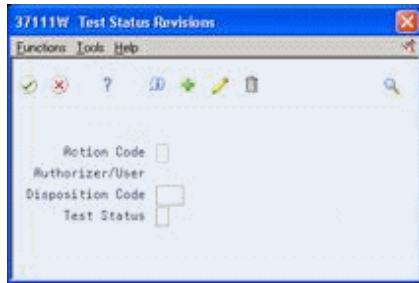
2. On Test Status Revisions, complete the following fields:

   ■ Disposition Code

   ■ Test Status

3. Access the Generic Text function to enter text describing why you changed a test's status.

Figure 10–9   Test Results Revisions Text (Generic Text) screen
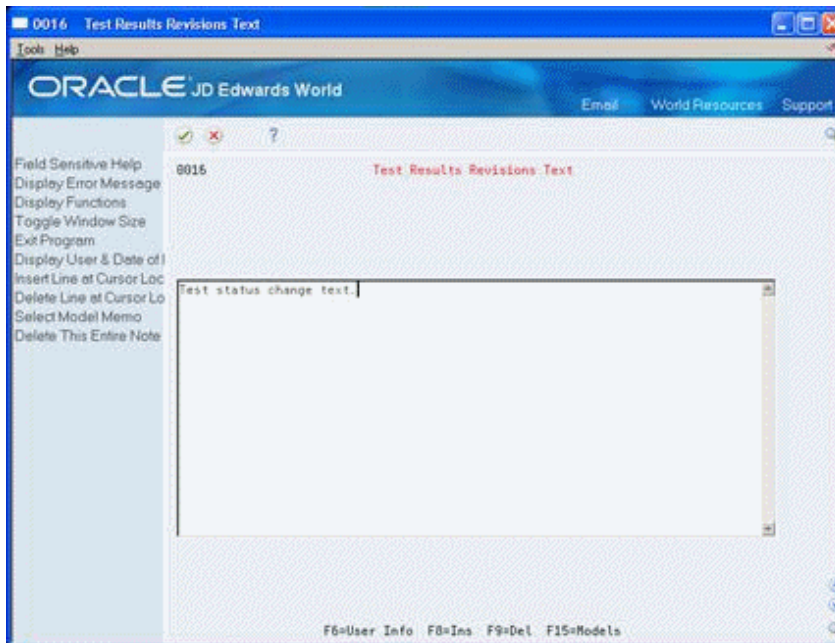
4. Choose the Evaluate function.

Field	Explanation
Disposition Code	A user defined code (system 37/type DS) that explains the purpose of the test status change. For example, you can indicate the reason you are passing the failed test, such as the item will go through re-work or will be scrapped.

See Also:

■ Work with Import/Export in the *JD Edwards World Technical Tools Guide*.

10.4.2 Processing Options

See Section 13.1, "Test Results - Preference Format (P3711)."

See Section 13.2, "Test Results - Order Number Format (P3711)."

See Section 13.3, "Test Results - ECS Format (P3711)."

See Section 13.4, "Bulk Load Confirmation - Order Based (P49510)."

10.5 Working with External Test Results

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

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

10.5.1 Processing Options

See Section 13.5, "Batch Test Results Entry (P37800)."

11

Review Test Results

This chapter contains these topics:

11.1 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 by identifying suspect components before shipment

- Reduce material scrap costs by identifying inferior components

- Improve overall product quality and customer satisfaction

11.2 Reviewing Test Results for an Item

Navigation

From Manufacturing Systems (G3), choose Quality Management
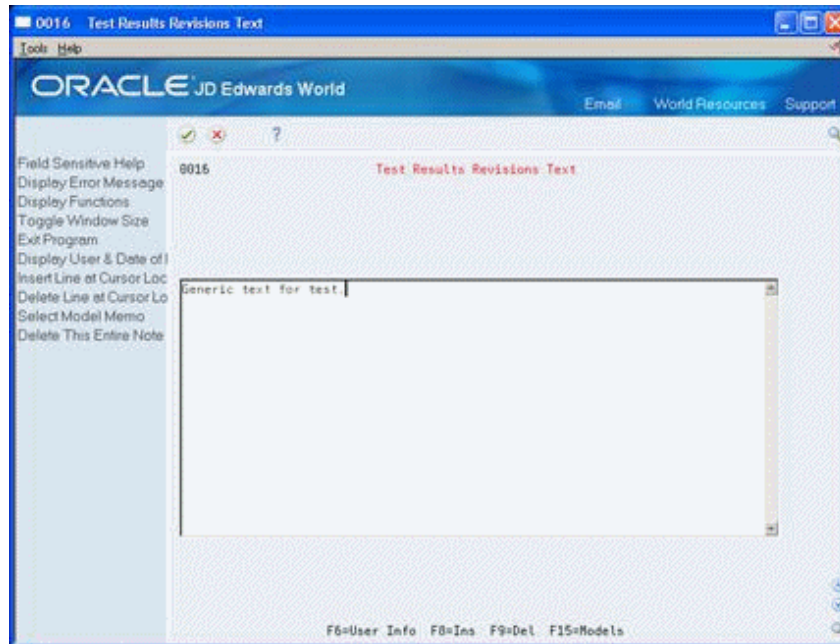
From Quality Management (G37), choose Test Results Inquiry

You can inquire on and review the test results for an individual item. You can select the item by test category codes, order number, lot or serial number, customer/supplier number, or by the item number alone. This allows you to gather and compile your information more efficiently.

To review test results

On Test Results Inquiry

Figure 11–1   Test Results Inquiry screen
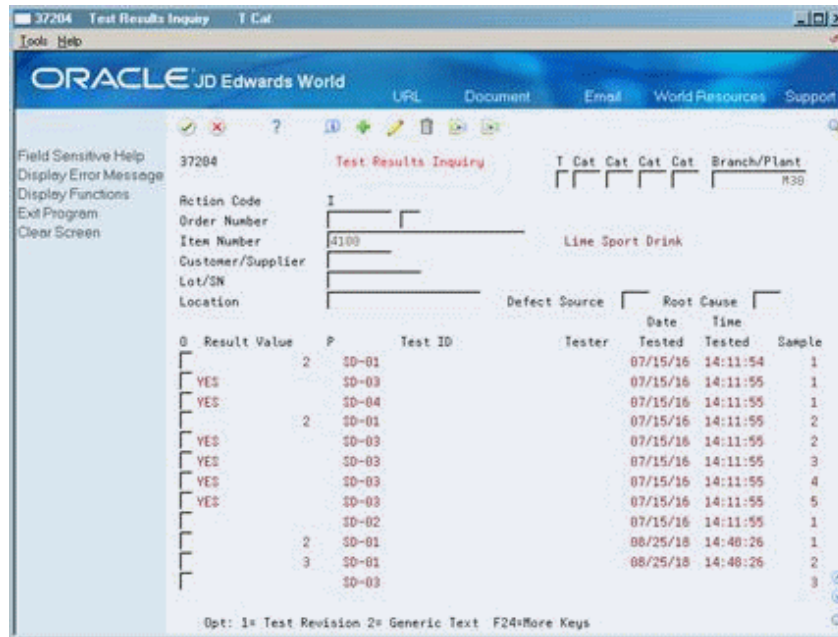
1. Complete the following fields to find test results:

   ■ Order Number

   ■ Item Number

   ■ Customer/Supplier

   ■ Lot/SN

   ■ Location

2. Review the following fields:

   ■ Result Value

   ■ P

   ■ Test ID

   ■ Tester

   ■ Date Tested

   ■ Time Tested

   ■ Sample

3. Access the detail area (F4).

Figure 11–2   Test Results Inquiry (Detail) screen

4. Review the following additional fields:

   ■ Allowed Min

   ■ Target

   ■ Allowed Max

   ■ Preferred Min.

   ■ Preferred Max.

   ■ Branch/Plant

   ■ Property

   ■ Item Number

   ■ Order Number

   ■ Lot

   ■ Defect Source

   ■ Root Cause

   ■ Customer

   ■ Location

Field	Explanation
T	Controls how the system processes tests as you enter test results. Allowed values are:
	R – Required (Default) - Result values are required during Results Entry. The system does not allow an item to pass quality inspection until you enter results for each required test.
	O – Optional - Result values are optional during Results Entry. The system allows an item to pass quality inspection regardless of whether you have entered results for each optional test.
	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.
Cat	A test code.
Result Value	The result of the performed test.
P	The value that identifies whether the test passed (P) or failed (F).
Test ID	The unique identification for a test to be performed on an item.
Tester	An eight-position number used to identify each entry in the Address Book, e.g., employees, customers, suppliers, special mailing addresses, etc.
Sample	A number assigned to a group of tests within the same sample.
Allowed Min	The lowest value for the desirable test result.
Target	The preferable or target test result within the test results range.
Allowed Max	The highest value for the desirable test result.
Preferred Min.	The lowest value for the desirable test result.
Preferred Max.	The highest value for the desirable test result.
Property Type	An item characteristic to be measured, such as color, density
Defect Source	A reason for the item's test failure.
Root Cause	The test responsible for the item's test failure.

11.3 Printing Test Results

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Test Results Report

Print program P37205 allows you to use data selection to print any combination of fields from the Test Result file F3711. Use this program for reports on non-lot-controlled items only.

To access processing options:

- For Test Results Reports, use P37205 on Versions List.

Figure 11–3   Test Results Report

11.4 Reviewing Test Results by Lot

Navigation

From Inventory Management (G41), choose Lot Control

From Lot Control (G4113), choose Lot Master Revisions

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

To review test results by lot

On Lot Master Revisions

1. To locate an item for which you have entered test results, complete the following fields:

    ■   Branch/Plant

    ■   Lot/SN

    ■   Item Number

2. Choose the Test Results Inquiry option.

Figure 11–4   Test Results Inquiry (Lot Master Revisions) screen
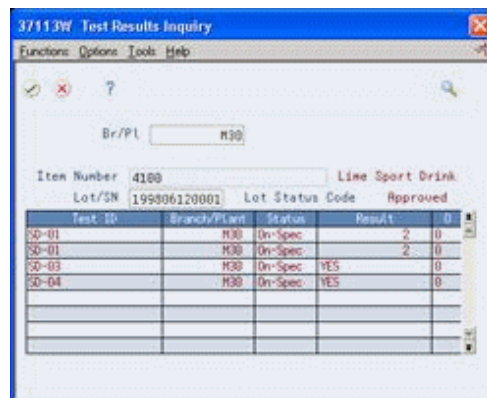
3. On Test Results Inquiry, review the following field to determine if a lot has passed quality inspection:

- Status

Field	Explanation
Average	This field will be used to indicate whether a result record is an averaged result. Averaged results are computed by totaling all result values for a particular test and dividing by the number of occurrences of that test.

11.4.1 What You Should Know About

Topic	Description
Sales Order Entry	As you enter a sales order, you can: ■ Use Test ID and test ranges to filter for items that meet your customer's requirements on Selection Criteria. ■ Locate items based on the Allowed Minimum or Allowed Maximum fields. ■ Determine if the lots you review on Item Search meet the customer or manufacturing specifications. ■ Add lots that meet your customer's requirements to the sales order. ■ Access Test Results Inquiry from Item Search to view test results for an item, lot, and customer so that you can determine whether the lot meets customer specifications.
Lot Availability	As you locate available lots, you can access Test Results Inquiry to show the tests performed.
Lot Master Revisions	As you work with lots, you can access Test Results Inquiry to review performed tests and results for the lot.

11.5 Reviewing Tested Lots

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Tested Lot Search

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

To review tested lots

On Tested Lot Search

Figure 11–5   Tested Lot Search screen

1. To locate a specific item and lot, complete the following fields:

   ■ Branch/Plant

   ■ Item Number

   ■ Test Identification

   ■ From Result Value

   ■ To Result Value

2. Review the following fields:

   ■ Value

   ■ Lot/SN

   ■ S (Specification/Test ID)

   ■ Status

   ■ Expiration

   ■ Available Quantity

3. Access the detail area (F4)

Figure 11–6   Tested Lot Search (Detail) screen
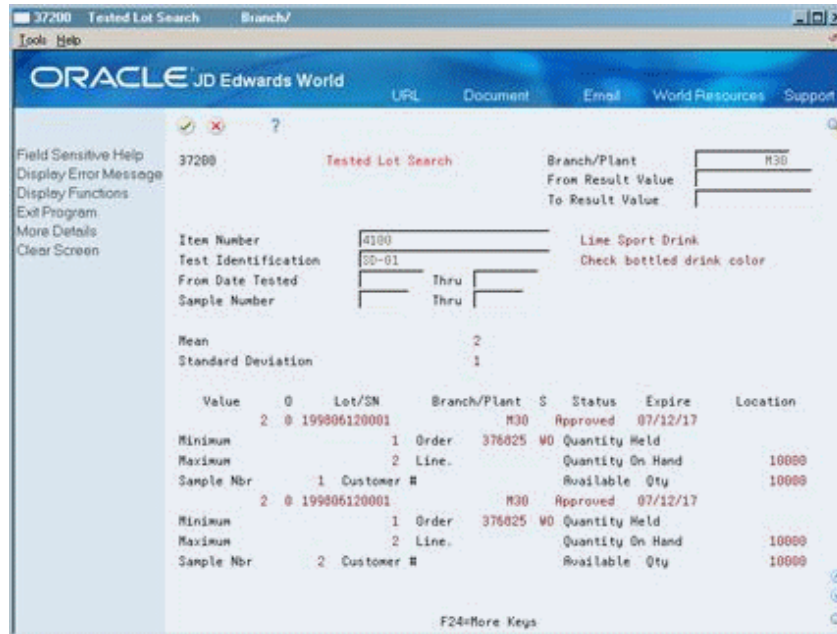
4. Review the following additional fields:

    ■   Minimum

    ■   Maximum

    ■   Sample Nbr

    ■   Order

    ■   Line

    ■   Customer #

    ■   Quantity Held

    ■   Quantity On Hand

    ■   Available Qty

Field	Explanation
Status	A user-defined code (table 41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold.
	You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.
Expiration	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.

Field	Explanation
Quantity	The quantity available can be the on-hand balance minus commitments, reservations, and backorders. Availability is user-defined and can be set up in branch/plant constants.

11.6 Reviewing Trace Test Results

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Trace Test Results

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

To review trace test results

On Trace Test Results

Figure 11–7   Trace Test Results screen
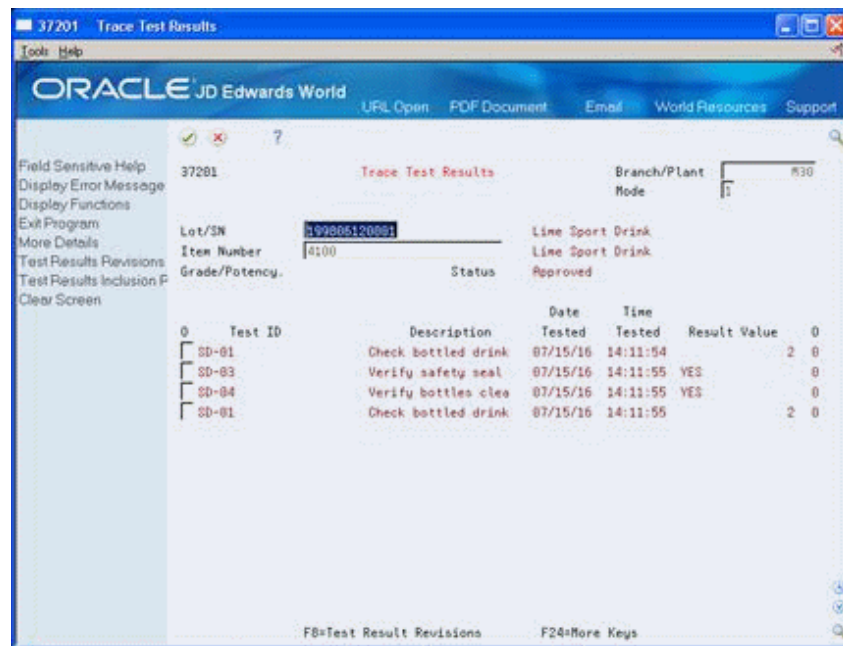
1. To locate a specific item and lot, complete the following fields:

   ■ Branch/Plant

   ■ Mode

   ■ Lot/SN

   ■ Item Number

2. Review the following fields:

   ■ Grade/Potency

   ■ Status

   ■ Test ID

- Description
- Date Tested
- Result Value
- Pass/Fail

3. Access the detail area (F4).

Figure 11–8   Trace Test Results (Detail) screen
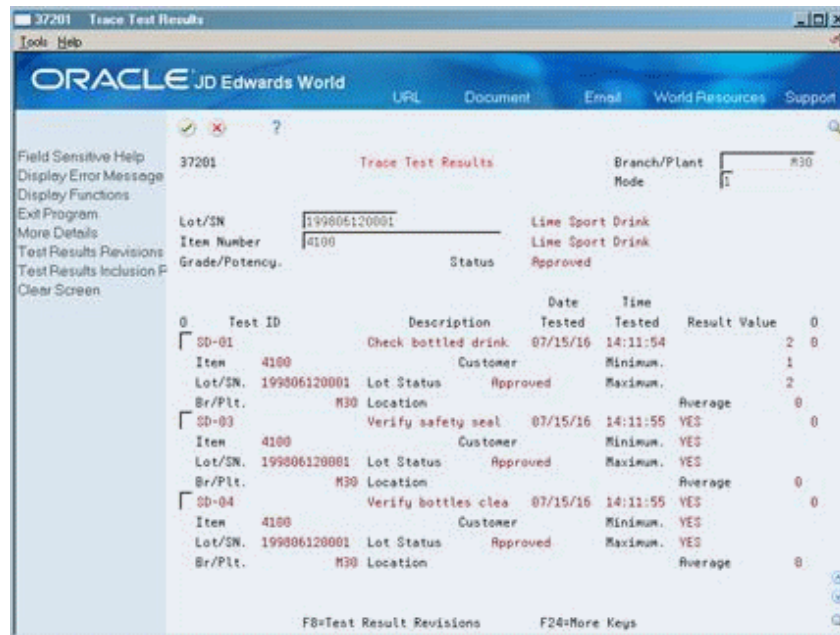
4. Review the following fields:

- Item
- Lot/SN
- Br/Plt.
- Customer
- Lot Status
- Location
- Minimum
- Maximum

5. To review the linked lots, enter 2 in the following field:

- Mode

Field	Explanation
Mode	A code that indicates how you want the system to display lot trace and track information. Valid codes are:
	1 – Single level trace/track
	2 – No intermediate levels (displays only top or bottom levels)
	3 – Multi-level trace/track
	4 – Multi-level indented trace/track

11.6.1 Processing Options

See Section 13.6, "Trace Test Results (P37201)."

11.7 Reviewing Nonconforming Products

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Nonconforming Product

Use the Nonconforming Product program to review all test results for items that have not passed test evaluation.

To review nonconforming products

On Nonconforming Product

Figure 11–9   Nonconforming Product screen
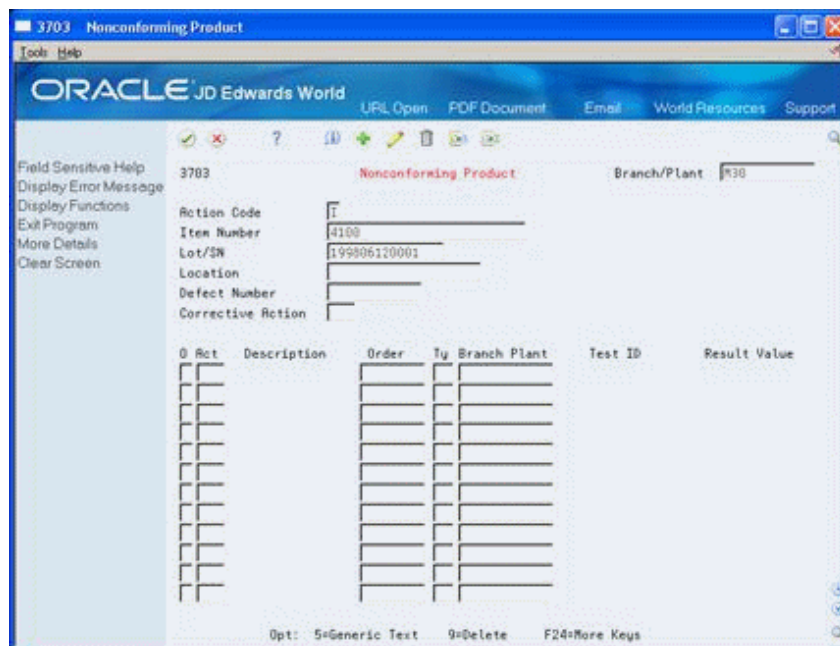
1. To locate a specific item, complete the following fields:

   - Branch/Plant

   - Item Number

- Lot/SN

- Location

2. Review the following fields:

- Order

- Type

- Branch Plant

- Test ID

- Result Value

3. Access the detail area (F4).

Figure 11–10   Nonconforming Product (Detail) screen
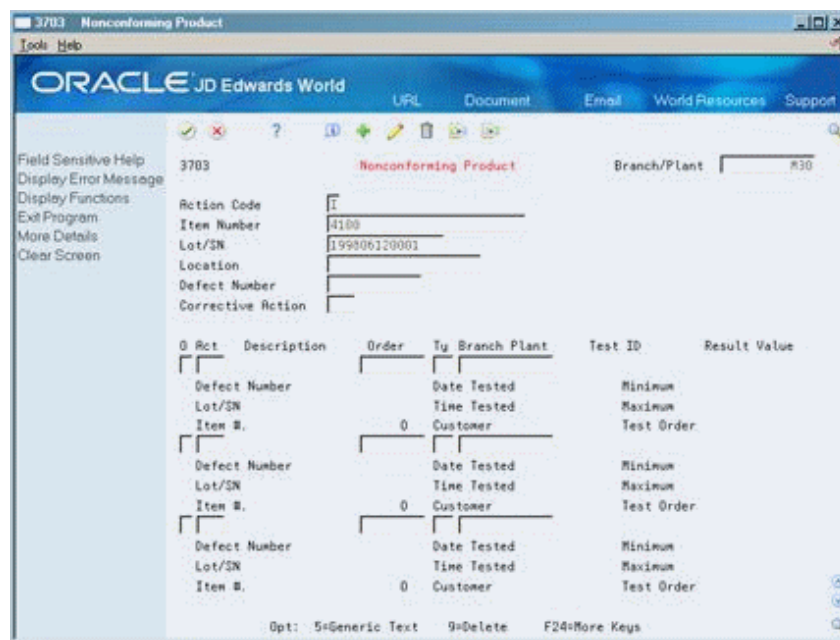
4. Review the following fields:

- Defect Number

- Lot/SN

- Item #

- Date Tested

- Time Tested

- Customer

- Minimum

- Maximum

- Test Order

5. To enter rework orders for a failed item, complete the following fields:

- (Corrective) Act

- Order

- Order Type

- Branch/Plant

A highlight indicates generic text for a test result.

11.7.1 Processing Options

See Section 13.7, "Non-Conforming Product (P3703)."

11.8 Printing a Certificate of Analysis

Navigation

From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Certificate of Analysis

If your customers require additional reporting, you can print a certificate of analysis (COA) which lists all of the tests performed and their results for lots sold to a customer.

Note: You can set processing options within the Ship Confirm and Load and Delivery Confirm programs to print certificates of analysis automatically.

You can also print a Certificate of Analysis from the Test Results Revisions screen.

11.8.1 Before You Begin

- Use the Print Test Flag on Test Definitions to control which tests and generic text are printed on the Certificate of Analysis. See Section 4.2, "Defining Tests."

- Use the COA Print Control on Customer Billing Instructions to determine which customers should receive a Certificate of Analysis. See Section 8.1, "Setting Up Customer Billing Instructions."

Figure 11–11   Certificate of Analysis

11.8.2 Processing Options

See Section 13.8, "Certificate of Analysis Extract (P37900)."

See Section 13.9, "Sales Order Invoices Print (P42565)."

See Section 13.4, "Bulk Load Confirmation - Order Based (P49510)."

11.9 Printing Test Results for Lot-Controlled Items

Navigation

From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Product Test Report

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

Although this report is intended for internal use, you can print test results in a certificate of analysis (COA) format without a sales order. For example, you might print COAs for inventory that will be placed in stock and sold later to unknown clients. In this case, you package the COA with the item prior to placing it in stock but before you sell it.

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

To generate a product test report, you must first use the extract program to obtain the information. Then from the extract program, you select the default or a custom Product Test report to print.

To access processing options:

- For Product Test Report Extract, use P37901 on Versions List.

- For Product Test Report, use P37450 on Versions List.

11.9.1 Example: Product Test Report

Figure 11–12   Product Test Report

```
37450                                        JDEdwards
                                    Product Test Report By Order
Description. . .
Status Comment
Lot Number . . .
Item Number. . .   548480 Micron computer  Related SO No  .
Reference. . . .
Test Identification           Description           Minimum        Maximum          Target          Result
------------------------      ------------------------      --------------  --------------  --------------  --------------
BOTTLING                      Bottling Inspection                  10.2500          20.2500          15.2500           1.0000
BOTTLING                      Bottling Inspection                  10.2500          20.2500          15.2500           1.0000
COLOR                         Color of beer                           1000             2000             1500             1200
COLOR                         Color of beer                           1000             2000             1500             1300
COLOR                         Color of beer                             10               20               15               16
COLOR                         Color of beer          RED             BLACK          YELLOW           RED
COLOR                         Color of beer          RED             BLACK          YELLOW           GREEN
COLOR                         Color of beer                             10               20               15               16
COLOR                         Color of beer                             10               20               15               12
COLOR                         Color of beer                             10               20               15               13
COLOR                         Color of beer                             10               20               15               11
COLOR                         Color of beer                             10               20               15             1000
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,500.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,550.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,600.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,650.0
TASTE                         Taste of beer                         112.0-          1,000.0            500.0            200.0
TASTE                         Taste of beer                         112.0-          1,000.0            500.0            150.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            150.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            151.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            152.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            153.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            110.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            111.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            112.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0            123.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,230.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,240.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,250.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,260.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,110.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,110.0
TASTE                         Taste of beer                       1,119.9-          9,999.9          5,000.0          1,110.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0         19,999.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0         19,999.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0         19,999.0
TASTE                         Taste of beer                       1,119.9-          9,999.9            500.0         19,999.0
```

Figure 11–13   Tester Detail

```
        Page. . . .        1
        Date. . . .  3/06/17  Order Number . .



        - - - - - - - - T E S T - - - - - - - - -
Tester    Date     Time
--------  --------  --------
          02/25/17   100146
          02/25/17   100230
          02/25/17   170814
          02/25/17   173741
          03/05/17    92206
5613332   03/05/17   101257
5613332   03/05/17   101257
          03/05/17   101840
          03/05/17   102616
          03/05/17   105232
          03/05/17   111651
          03/05/17   131147
          03/05/17    92206
          03/05/17    92206
          03/05/17    92206
          03/05/17    92206
5613332   03/05/17   101257
5613332   03/05/17   101257
          03/05/17   101841
          03/05/17   101841
          03/05/17   101841
          03/05/17   101841
          03/05/17   102616
          03/05/17   102616
          03/05/17   102616
          03/05/17   102616
          03/05/17   105232
          03/05/17   105232
          03/05/17   105232
          03/05/17   105232
          03/05/17   111651
          03/05/17   111651
          03/05/17   111651
          03/05/17   111651
          03/05/17   131147
          03/05/17   131147
          03/05/17   131147
          03/05/17   131147
```

Part III

Processing Options

This part contains these chapters:

12

System Setup Processing Options

This chapter contains the topic:

-

12.1 Item Test/Specification Report (P37420)

Processing Option	Processing Options Requiring Further Description
REPORT FORMAT:	
1. Enter a '1' to print test detail for each specification selected.	
If left blank, only the specification will be printed.	

13

Test Results Processing Options

This chapter contains these topics:

13.1 Test Results - Preference Format (P3711)

Processing Option	Processing Options Requiring Further Description
DISPLAY CONTROL:	
1. Enter the screen format to display: 1 = Preference format 2 = Order number format 3 = ECS trip format If left blank, the Preference format will be used.	
2. Enter '1' to display data in test order. If left blank, data will display in sample number order.	
FIELD DISPLAY CONTROL:	

Processing Option	Processing Options Requiring Further Description
3. Enter '1' to protect Date and Time Tested.	
4. Enter '1' to protect Tester.	
DEFAULT VALUES:	
5. Enter the default Address Book Number for Tester. If left blank, Tester must be entered manually.	
6. Enter '1' to use Preferred Minimum and Maximum when evaluating test results. If left blank, Allowed Minimum and Maximum will be used.	
7. Enter '1' to display Number of Samples for input. If left blank, Number of Samples will default from either Preference Profiles or Test Definitions Master.	
LOT STATUS:	
8. Enter the status for a failed lot.	
9. Enter the status for a passing lot.	
10. Enter the status update selection: 1 = Automatically update the status for all lot locations. 2 = Display the Location Lot Status Change window when updating the lot status. If left blank, only the lot master lot status will be updated.	
NONCONFORMING PRODUCT:	
11. Enter '1' to write failed tests to the Nonconforming Product file.	
DREAM WRITER VERSIONS: Enter the version for each program: If left blank, ZJDE0001 will be used.	
12. Certificate of Analysis (P37900)	
13. Product Test Report (P37901)	
14. Trace Test Results (P37201)	
PREFERENCE PROFILE PROCESSING:	
15. Enter '1' to search for existing test results by lot number. If left blank, Preference Profiles for Quality Management will be called and new test records will be created for the current document number.	
GENERIC TEXT:	
16. Enter the text copy selection: 1 = Copy Generic Text from Test Revisions (P3701). 2 = Copy Generic Text from Preference Profiles (P40300). If left blank, text will not be copied.	
SAMPLE NUMBER:	
17. Enter '1' to let system assign the sample number or blanks to manually assign the sample numbers.	

Processing Option	Processing Options Requiring Further Description
DELETE NEW SAMPLE WITH BLANK RESULTS:	
18. Enter '1' to let the system delete all new samples with blank results.	
If left blank, system will not delete the blank test results.	

13.2 Test Results - Order Number Format (P3711)

Processing Option	Processing Options Requiring Further Description
DISPLAY CONTROL:	
1. Enter the screen format to display:	
1 = Preference format	
2 = Order number format	
3 = ECS trip format	
If left blank, the Preference format will be used.	
2. Enter '1' to display data in test order.	
If left blank, data will display in sample number order.	
FIELD DISPLAY CONTROL:	
3. Enter '1' to protect Date and Time Tested.	
4. Enter '1' to protect Tester.	
DEFAULT VALUES:	
5. Enter the default Address Book Number for Tester.	
If left blank, Tester must be entered manually.	
6. Enter '1' to use Preferred Minimum and Maximum when evaluating test results.	
If left blank, Allowed Minimum and Maximum will be used.	
7. Enter '1' to display Number of Samples for input.	
If left blank, Number of Samples will default from either Preference Profiles or Test Definitions Master.	
LOT STATUS:	
8. Enter the status for a failed lot.	
9. Enter the status for a passing lot.	
10. Enter the status update selection:	
1 = Automatically update the status for all lot locations.	
2 = Display the Location Lot Status Change window when updating the lot status.	
If left blank, only the lot master lot status will be updated.	
NONCONFORMING PRODUCT:	
11. Enter '1' to write failed tests to the Nonconforming Product file.	

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
Enter the version for each program:	
If left blank, ZJDE0001 will be used.	
12. Certificate of Analysis (P37900)	
13. Product Test Report (P37901)	
14. Trace Test Results (P37201)	
PREFERENCE PROFILE PROCESSING:	
15. Enter '1' to search for existing test results by lot number.	
If left blank, Preference Profiles for Quality Management will be called and new test records will be created for the current document number.	
GENERIC TEXT:	
16. Enter the text copy selection:	
1 = Copy Generic Text from Test Revisions (P3701).	
2 = Copy Generic Text from Preference Profiles (P40300).	
If left blank, text will not be copied.	
SAMPLE NUMBER:	
17. Enter '1' to let system assign the sample number or blanks to manually assign the sample numbers.	
DELETE NEW SAMPLE WITH BLANK RESULTS:	
18. Enter '1' to let the system delete all new samples with blank results.	
If left blank, system will not delete the blank test results.	

13.3 Test Results - ECS Format (P3711)

Processing Option	Processing Options Requiring Further Description
DISPLAY CONTROL:	
1. Enter the screen format to display:	
1 = Preference format	
2 = Order number format	
3 = ECS trip format	
If left blank, the Preference format will be used.	
2. Enter '1' to display data in test order.	
If left blank, data will display in sample number order.	
FIELD DISPLAY CONTROL:	
3. Enter '1' to protect Date and Time Tested.	
4. Enter '1' to protect Tester.	
DEFAULT VALUES:	

Processing Option	Processing Options Requiring Further Description
5. Enter the default Address Book Number for Tester. If left blank, Tester must be entered manually.	
6. Enter '1' to use Preferred Minimum and Maximum when evaluating test results. If left blank, Allowed Minimum and Maximum will be used.	
7. Enter '1' to display Number of Samples for input. If left blank, Number of Samples will default from either Preference Profiles or Test Definitions Master.	
LOT STATUS:	
8. Enter the status for a failed lot.	
9. Enter the status for a passing lot.	
10. Enter the status update selection: 1 = Automatically update the status for all lot locations. 2 = Display the Location Lot Status Change window when updating the lot status. If left blank, only the lot master lot status will be updated.	
NONCONFORMING PRODUCT:	
11. Enter '1' to write failed tests to the Nonconforming Product file.	
DREAM WRITER VERSIONS: Enter the version for each program: If left blank, ZJDE0001 will be used.	
12. Certificate of Analysis (P37900)	
13. Product Test Report (P37901)	
14. Trace Test Results (P37201)	
PREFERENCE PROFILE PROCESSING:	
15. Enter '1' to search for existing test results by lot number. If left blank, Preference Profiles for Quality Management will be called and new test records will be created for the current document number.	
GENERIC TEXT:	
16. Enter the text copy selection: 1 = Copy Generic Text from Test Revisions (P3701). 2 = Copy Generic Text from Preference Profiles (P40300). If left blank, text will not be copied.	
SAMPLE NUMBER:	
17. Enter '1' to let system assign the sample number or blanks to manually assign the sample numbers.	
DELETE NEW SAMPLE WITH BLANK RESULTS:	
18. Enter '1' to let the system delete all new samples with blank results. If left blank, system will not delete the blank test results.	

13.4 Bulk Load Confirmation - Order Based (P49510)

Processing Option	Processing Options Requiring Further Description
TRIP STATUS OPTIONS:	
1. Enter the incoming trip status range to process.	
From (Required)	
To (Required)	
ORDER STATUS OPTIONS:	
2. Enter the incoming next order status range to process.	
From (Required)	
To (Required)	
Note: This range is for confirmation by order only.	
SCREEN DEFAULTS:	
3. Enter screen defaults for the following fields:	
Depot	
Delivery date	
Load date	
Sales order type	
TANK OWNER OPTIONS:	
4. Enter the owner number to be used as a default for tanks commingled for duty when the duty status indicates that duty is paid.	
5. Enter the owner number to be used as a default for tanks commingled for duty when the duty status indicates that duty is not paid.	
LOAD CONFIRMATION OPTIONS:	
6. Enter the tolerance that is allowed for the load quantity variances. The value entered here is treated as a percentage value of the loaded quantity to calculate the upper and lower limits.	
Example:	
Upper limit of 5 and lower of 5 Loaded qty = 1000, hence Upper = 1000 + (5% of 1000) = 1050 Lower = 1000 - (5% of 1000) = 950	
Enter 1.5% as 1.5.	
+ Upper Limit	
- Lower Limit	
7. Enter '1' to load confirm by order.	
Blank will default to confirmation by trip only.	
8. Enter '1' to pre-load the selection option for confirmation. Valid only in order confirmation mode.	
9. Enter '1' to display the Document Selection Window for delivery documents.	

Processing Option	Processing Options Requiring Further Description
10. Enter '1' to not display the contractor information.	
11. Enter '1' to not print delivery documents.	
Blank will automatically print the documents.	
12. Enter '1' to not check for the number of seals required.	
Blank will display the Seals Window if seals are required.	
DREAM WRITER VERSIONS:	
Enter the version for each program.	
If left blank, the system uses ZJDE0001.	
13. Bulk Delivery Confirmation P49710	
14. Transportation Trans. Server XT49799	
15. Vehicle Register Window P49310W	
16. Document Print Control P49545	
17. Bulk Disposition (Load and Deliver) P49715	
18. Download Data Queue Interface P49570	
19. Additional S/O Info-Aviation/Marine P49510A	
MANUAL INVOICE CONTROL:	
20. Enter one of the following:	
1 = To allow entry of an invoice number and/or delivery number.	
2 = To default the invoice number from the order number.	
3 = To default the delivery number from the order number.	
4 = To default the invoice number and delivery number from the order number.	
' '= Leave blank if there is not a manual invoice or delivery document to enter.	
21. Enter the override manual invoice document type.	
If left blank, the order's document type will be used.	
AUTOMATED GANTRY:	
22. If you are using an automated gantry, enter '1'.	
If blank it means that you are not using an automated gantry.	
23. If you are using an automated gantry, leave blank to not download the next trip. A value of '1', '2', or '3' will automatically download the next trip with the following matching criteria of the confirmed trip:	
1 = Vehicle, load date, and shift must match.	
2 = Vehicle and load date must match.	
3 = Vehicle must match and the load date must be equal to or greater than the current date.	

Processing Option	Processing Options Requiring Further Description
DISPOSITION DEFAULT:	
24. Enter a Disposition Code to affect any remaining quantity not loaded.	
This Processing Option is only used for Load Confirmation of Actuals.	
S = Leave as shippable (Default)	
B = Backorder	
C = Cancel	
K = Cancel the entire line	
AGREEMENT MANAGEMENT CONTROL:	
25. If the Agreement Management system is being used and the depot from which the load is being confirmed is defined as a foreign depot in the branch/plant constants, a borrow agreement is required and an Agreement Search will be performed.	
Specify which destination should be used by the search program.	
Enter the specific branch/plant to be used as the destination.	
OR	
Enter '1' to use *ANY or enter '2' to use the user's default branch/plant.	
QUALITY MANAGEMENT:	
26. Enter '1' to test based on vehicle compartment.	
Enter '2', testing will be for each different customer or item.	
If left blank, no Quality testing will be done.	
27. Enter the version of Test Results Revisions (P3711) to call.	
If left blank, version ZJDE0002 will be used when confirming load by order or ZJDE0003 will be used when confirming load by trip.	
28. Enter '1' to automatically print a Certificate of Analysis following completion of the confirmation.	
29. Enter the version of the Certificate Analysis Extract (P37900) to call.	
If left blank, version ZJDE0001 will be used.	

13.5 Batch Test Results Entry (P37800)

Processing Option	Processing Options Requiring Further Description
PROCESSING CONTROL:	
1. Enter a '1' to update the Test Results file (F3711).	
If left blank, 'Proof' mode is assumed.	
2. Enter the status for a failed lot.	
If left blank, the lot status will not be updated for failed lots.	

Processing Option	Processing Options Requiring Further Description
3. Enter the status for a passing lot.	
If left blank, the lot status will not be updated for passing lots.	
REPORT OPTIONS:	
4. Enter a '1' to print all new and changed Test Results.	
If left blank, only exceptions will print.	

13.6 Trace Test Results (P37201)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
Enter the version for each program.	
If left blank, 'ZJDE0001' will be used.	
1. Test Results Revisions (P3711)	

13.7 Non-Conforming Product (P3703)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
Enter the version for each program.	
If left blank, 'ZJDE0001' will be used.	
1. Test Results Revisions (P3711)	

13.8 Certificate of Analysis Extract (P37900)

Processing Option	Processing Options Requiring Further Description
ADDRESS DEFAULT INFORMATION:	
1. Enter which address type is to be used to retrieve the address information.	
1 = Ship To address	
2 = Sold To address	
3 = Parent address	
If left blank, the Ship To address will be used.	
NEXT STATUS:	
2. Enter the Override Next Status Code.	
TRACE PROCESSING:	
3. Enter the way to trace test results:	
1 = Single-Level	
2 = Multi-Level	
If left blank, lot trace will not be performed.	
CUSTOMER PREFERENCES:	

Processing Option	Processing Options Requiring Further Description
4. Enter '1' to print minimum and maximum values from the customer preference.	
If left blank, the minimum and maximum values used at the time of Test Result entry will appear on the COA. Use of this option will cause a re-evaluation of the on/off spec status of each test.	
CERTIFICATE OF ANALYSIS:	
5. Enter the version of the Certificate of Analysis (P37460) to call.	
If left blank 'ZJDE0001' will be used.	
USER DEFINED PROGRAM:	
6. Enter the program name of the Certificate of Analysis program.	
7. Enter the version of the user defined Certificate of Analysis program to call.	

13.9 Sales Order Invoices Print (P42565)

Processing Option	Processing Options Requiring Further Description
STATUS CODES:	
1. Enter the range of status codes to be selected for processing. Next Status Code From (Required) Next Status Code To (Required)	You must enter the range of next status codes to be selected for processing. Only order lines that fall within this range will print. You can narrow down the orders that print by data selecting on specific status codes.
2. Override Next Status (Optional)	
3. Enter a '1' to prevent updating the Next Status Code from Order Activity Rules. If left blank the Next Status Code will be updated.	Set this processing option to 1 if you use this version of the program to re-print orders. By setting this option to 1, the system will not advance the status codes on the order lines.
TAX INFORMATION:	
4. Enter a '1' to print by Tax Group. Enter a '2' to print by Tax Area. Enter a '3' to print by Tax Authority. If left blank, no tax information will print.	
REPORT DISPLAY:	
5. Enter the date to be printed as invoice date. If left blank, the system date will be used.	
6. Enter a '1' to prevent A/R number from being assigned (used when creating a consolidated proof).	Set this option to 1 when you do not want the program to assign invoice numbers to sales order lines. You usually set this option to 1 when you use this version of the program to print acknowledgements.
7. Enter an index number (1-10) used to assign the A/R Next Number. If left blank, index 01 will be used as the default.	Enter the next number bucket from which the program is to retrieve a beginning invoice number. You set up next numbers for invoices in the Next Numbers screen (P0002) under system code 03 (Accounts Receivable).

Processing Option	Processing Options Requiring Further Description
8. Enter the document type to be used for the invoice. If left blank, 'RI' will be used for the customer invoice and 'RT will be used for the inter-branch invoice.	
9. Enter the global print message to print on each invoice.	Enter a global print message if you want the same message to print on every order. You set up messages in Print Message Revisions (P4016).
10. Enter a '1' to print serial numbers. If left blank, no serial numbers will print.	
11. Enter a '1' to print Sales Order Header & Detail associated text. Enter a '2' to print only Header associated text. Enter a '3' to print only Detail associated text.	
12. Enter a '1' to extend the price on backordered lines. If left blank, the price will not be extended. **Note:** This is for print purposes only.	
13. Enter a '1' to print the available discount. If left blank, the discount will not print.	Enter 1 to print the discount amount as it applies to payment terms. This option has no relation to price discounts generated in the Advanced Pricing system.
14. Enter '1' to suppress the printing of costs. If left blank, all costs will print.	
15. Enter '1' to suppress the printing of prices. If left blank, all prices will print.	
16. Enter '1' to suppress the printing of Pct. If left blank, Pct will print.	
17. Enter '1' to print Country of Origin.	
18. Enter number of Lot Category code to print. If left blank Lot Category code will not print.	
LINE DISPLAY:	
19. Enter a '1' to print backordered and cancelled lines only once. If left blank, the backordered and cancelled lines will continue to print.	
20. Enter a '1' to print backordered lines. Enter a '2' to print cancelled lines. Enter a '3' to print both. Enter a '4' to print neither.	
21. Enter a '1' to print kit component lines. If left blank, no kit component lines will print.	
22. Enter a '1' to print future committed inventory lines. If left blank, future lines will not print.	
23. Enter a '1' to print future committed lines only once. If left blank, future committed lines will continue to print.	
ITEM NUMBER DISPLAY:	

Processing Option	Processing Options Requiring Further Description
24. Enter a '1' to print only our item number. Enter a '2' to print both our item number and the customer item number. If left blank, only our item number will print.	Set this option to 1 to have identical items on a sales order summarize to a single line on the invoice (items must have the same price and cost). Set to 2 if you want to summarize kit parent items. This option does not work if you consolidate orders by customer into a single invoice, that is, it will only summarize like items within a sales order.
25. If you wish to print the customer item number, enter the type of cross reference to retrieve.	Set this option to 1 to have this program call the Inventory Commitment program (P42997) for stock items to determine the physical location from which to relieve inventory. If an order is already hard committed prior to running P42565, the existing commitment will not change.
26. Enter a '1' to summarize by item. Enter a '2' to summarize items within each whole line number (Kit Grouping). Note: Do not use if consolidating.	
INVENTORY PROCESSING:	
27. Enter a '1' to hard commit inventory. If left blank the inventory commitment will not change.	The P42950 serves three purposes depending on the version you run. It will update sales order costs, prices, or exchanges rates (and the corresponding amounts). You set this option to 1 to have the P42950 make updates to sales orders before they print. You specify the version of P42950 you want to run in processing option 27. The P42950 will not change costs on sales order lines for which items have been relieved from inventory (via Ship Confirm). When inventory is relieved, the system writes a Cardex record (F4111) containing the cost; therefore, changing the costs afterwards could cause integrity problems.
28. Enter a '1' to use the Inventory Commitment Preference to source from multiple branches. If left blank, the branch from the Sales Order detail line will be used.	Version ZJDE0001 of P42950 is preset to update exchange rates and their corresponding amounts (usually domestic).
SALES COST UPDATE:	
29. Enter '1' to update the item cost with the current inventory cost by running the Sales Cost Update (P42950) prior to invoice print.	Interbranch invoices are usually defined with an RT invoice document type. See processing option 8.
30. Enter the version of Sales Cost Update to run. If left blank, will use version ZJDE0001.	
INTER-BRANCH INVOICE:	
31. Enter '1' to print an inter-branch invoice. If left blank, customer invoices will be printed.	
CURRENCY PROCESSING:	
32. Enter a '1' to print amounts in foreign currency. If left blank, only domestic currency amounts will print.	
DRAFT PRINTING:	

Processing Option	Processing Options Requiring Further Description
33. Enter a '1' to print drafts. If left blank, no drafts will print for any customer.	Document Control Revisions (P0170) allows you to specify how each of your customers receives invoices, that is, via hard copy, EDI or Fax. You set this option to 1 to have the program locate control revisions for each customer, and then print, fax, or send out the invoice via EDI, accordingly. If the option is set to 1 and the program can't find control revisions for a customer, it will generate no output for the invoice.
34. Enter the city name where the draft is being originated. This city will print on the draft. If left blank, no city will appear on the draft.	In Document Control Revisions (P4071) you must enter a program ID for each type of document. There are four different program IDs for P42565, each of which corresponds to the value you enter in this processing option.
PROCESSING CONTROL EDIT:	
35. Specify one of the following: Enter a '1' to perform Processing Control Edit to determine which customers to process. Enter a '2' to perform Processing Control Edit to determine which customers to process, but default to EDI, PRINT, and FAX setup listed below if not found. If left blank, Processing Control Edit will not be performed to determine which customers to process. EDI, PRINT, and FAX options listed below will be used.	
PROCESSING CONTROL & EDI PROCESSING:	
36. Select the type of transaction being processed by this program. This option is used by document control processing. An entry of '1' = P42565-1 from UDC table 00/DP. This option is also used by EDI processing to determine which EDI files to update. This option is MANDATORY for EDI or document control processing. 1 = Invoice 2 = Order Acknowledgment 3 = Response to Quote 4 = Change Order Acknowledgment	Unutilized EDI information refers to extra data you attach to an EDI transaction. The system maintains the data in the F4700.
EDI PROCESSING:	
37. Enter the following EDI defaults: EDI Document type (EDCT) EDI Transaction Set (EDST) EDI Translation Format (EDFT) Trading Partner ID (PNID) Transaction Set Purpose (TPUR) Acknowledgment Type Code (ACKT) Lines Status Code (LSTS) Change Code (CHGC)	
38. Enter a '1' to create outbound EDI Unutilized Information records. If left blank, Unutilized Information records will not be created.	

Processing Option	Processing Options Requiring Further Description
39. Enter a '1' to extract advanced pricing history information from F4074. (Valid for Invoices, Order Acknowledgments, and Change Order Acknowledgments.) If left blank, pricing history will not be extracted.	If you set this option to create EDI transactions, the P42565 populates different EDI files based on the transaction set.
40. Enter '1' to extract user defined data for the sales order header. If left blank, no EDI Order Header - User Defined records will be created.	Set this option to 1 to have the program create a separate spool file for each customer's invoices and put it in the output queue you specify in the next processing option. You'll need to use a third party software package to actually extract, convert and send out the information via facsimile.
41. Enter the user defined data types to be extracted at the header level. You may specify up to five data types. Enter '*' in the first field to extract all types.	
42. Enter '1' to extract user defined data for the sales order lines. If left blank, no EDI Order Detail - User Defined records will be created.	
43. Enter the user defined data types to be extracted at the line level. You may specify up to five data types. Enter '*' in the first field to extract all types.	
DOCUMENT PROCESSING CONTROL "DEFAULTS":	
EDI PROCESSING:	
44. Enter a '1' to generate EDI data. If left blank, EDI data will not be generated.	
PRINT PROCESSING:	
45. Enter a '1' to print the document. If left blank, the document will not be printed.	
FAX DOCUMENT PROCESSING:	
46. Enter a '1' to fax the document. If left blank, the document will not be faxed.	
47. Enter the Fax Output Queue. If left blank, the fax will be written to the same output queue as printed documents.	
HELD ORDERS:	
48. Enter a '1' to include orders on hold. If left blank held orders will be bypassed.	
49. If including held orders, enter a '1' to print text on the invoice header to denote held orders. If left blank or if consolidating no text will be printed.	

13.10 Product Test Report by Lot(P37450)

Processing Option	Processing Options Requiring Further Description
REPORT FORMAT:	
1. Enter a '1' to print generic text from the Test Results file (F3711).	
2. Enter '1' to print the Preferred Minimum and Maximum.	
If left blank the Allowed Minimum and Maximum will print.	

13.11 Product Test Report by Work Order (P37450)

Processing Option	Processing Options Requiring Further Description
REPORT FORMAT:	
1. Enter a '1' to print generic text from the Test Results file (F3711).	
2. Enter '1' to print the Preferred Minimum and Maximum.	
If left blank the Allowed Minimum and Maximum will print.	

13.12 Product Test Report (P37450)

Processing Option	Processing Options Requiring Further Description
REPORT FORMAT:	
1. Enter a '1' to print generic text from the Test Results file (F3711).	
2. Enter '1' to print the Preferred Minimum and Maximum.	
If left blank the Allowed Minimum and Maximum will print.	

13.13 Test Definitions Master - Z File (P3701Z) (Release A9.3 Update)

Processing Option	Processing Options Requiring Further Description
ERROR REPORTING:	
1. Enter '1' to skip printing the error report.	
If left blanks, the report will print.	
2. Enter the version to be used to call the error report program (P41ZERR).	
If left blank, XJDE0012 will be used	

13.14 Test Specification - Z File (P3702Z) (Release A9.3 Update)

Processing Option	Processing Options Requiring Further Description
ERROR REPORTING:	
1. Enter '1' to skip printing the error report. If left blanks, the report will print.	
2. Enter the version to be used to call the error report program (P41ZERR). If left blank, XJDE0012 will be used	

13.15 Test Results - Z File (P3711Z) (Release A9.3 Update)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
1. Enter the version to be used to call Test Results Revision (P3711). If left blank, ZJDE0001 will be used.	
ERROR REPORTING:	
2. Enter '1' to skip printing the error report. If left blanks, the report will print.	
3. Enter the version to be used to call the error report program (P41ZERR). If left blank, XJDE0012 will be used	

A

Functional Servers

This appendix contains the topic:

- Appendix A, "Functional Servers."

A.1 About Functional Servers

Several JD Edwards World programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values

- Field edits and valid values

- Error processing

- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.

- You can standardize documents across all applications because you create them using the same business rules.

- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

To set up business rules for an entry program

The steps for setting up business rules for an entry program are:

1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).

2. Set the processing options within the version according to your company requirements.

3. Specify the version you want the entry program to use in the processing options for that entry program.

You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. JD Edwards World provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.

> **Caution:** Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the *JD Edwards World Technical Foundation Guide*.

A.1.1 Example: Voucher Processing Functional Server

The following programs use the voucher processing functional server. JD Edwards World provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.

- Speed Voucher Entry (P040015)
- Standard Voucher Entry (P04105)
- Void Payment Entry (P4704103)
- Credit Tied to Debit Bill (P041010)
- Multi-Voucher (P041017)
- Calculate Withholding (P04580)

B

Import Mass Data into Quality Management

Several interactive programs can run in batch mode and accept data from a Z file, allowing you to process mass amounts of data from an outside source easily and efficiently using existing programs to validate the data.

You can process any number of records to add, change, or delete. You also have the advantage of:

- Data selection to limit the records you want to process.

- Processing options that allow you to choose the version of the interactive program to process the records.

- Error report printing.

Generally, the DREAM Writer program number corresponds to the screen and program number with a Z appended to the end and the Z file numbers correspond to the program file number with a Z appended to the end. For example, P3701Z corresponds to the Test Revisions program (P3701) and F3701Z corresponds to the Test Definitions Master File F3701.

> **See:**
>
> - Import Using Z File Processing in the *JD Edwards World Technical Tools Guide* for detailed information about Z file processing.
>
> - Overview to Import/Export in the *JD Edwards World Technical Tools Guide* for information about importing data into the system.

The following table includes the Quality Management Z file processing programs.

Program	Program Name	Z File Program	Z File
P3701	Test Revisions	P3701Z	F3701Z
P3702	Specification Revisions	P3702Z	F3702HZ (header) and F3702DZ (detail)
P3711	Test Results Revisions	P3711Z	F3711HZ (header) and F3711DZ (detail)

Navigation

From Quality Management (G37), choose Z File Processing

From Manufacturing Z File Processing (G3001Z), choose an option

Processing Options

See the appropriate set of Z file processing options in Chapter 13, "Test Results Processing Options".

Data Selection

Do not change the existing data selection. The Processed Y/N field is set to NE Y. This prevents the program from processing records more than once.

You can add additional selections to limit the data.

Data Sequence

Do not change the data sequence.

Index

Z