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WORLD SOFTWARE®

Quality Management

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JDEdwards®



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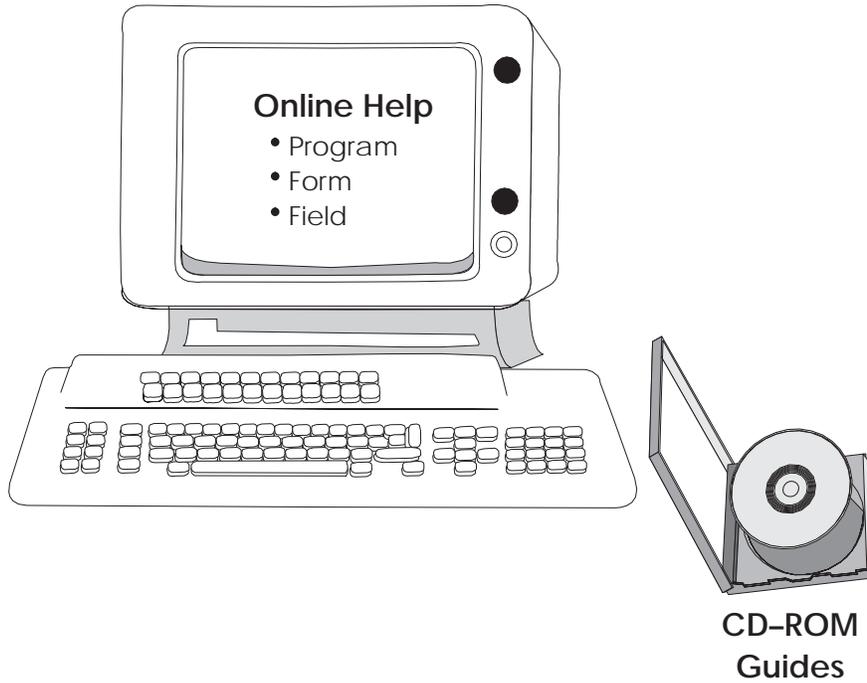
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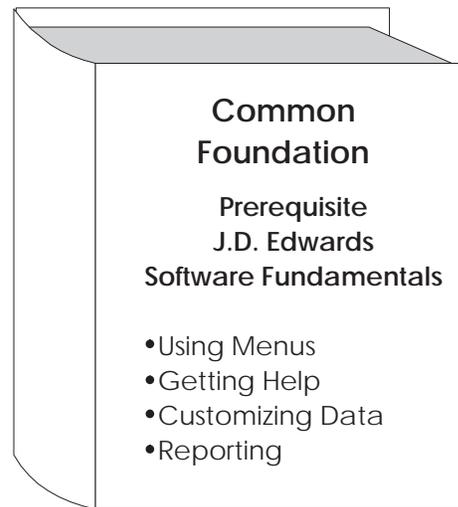
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Where Do I Look?



Guides



Important Note for Students in Training Classes

This guide is a source book for online helps, training classes, and user reference. Training classes may not cover all the topics contained here.

Welcome

About this Guide

This guide provides overviews, illustrations, procedures, and examples for the current release of J.D. Edwards software. Forms (screens and windows) shown are only examples. If your company operates at a different software level, you might find discrepancies between what is shown in this guide and what you see on your screen.

This guide includes examples to help you understand how to use the system. You can access all of the information about a task using either the guide or the online help.

Before using this guide, you should have a fundamental understanding of the system, user defined codes, and category codes. You should also know how to:

- Use the menus
- Enter information in fields
- Add, change, and delete information
- Create and run report versions
- Access online documentation

Audience

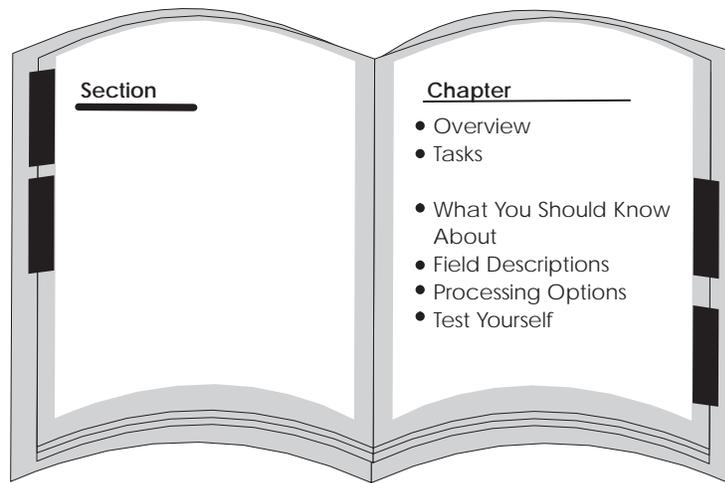
This guide is intended primarily for the following audiences:

- Users
- Classroom instructors
- Client Services personnel
- Consultants and implementation team members

Organization

This guide is divided into sections for each major function. Sections contain chapters for each task or group of related tasks. Each chapter contains the information you need to accomplish the task, run the program, or print the

report. Chapters normally include an overview, form or report samples, and procedures.



When it is appropriate, chapters also might explain automatic accounting instructions, processing options, and warnings or error situations. Some chapters include self-tests for your use outside the classroom.

This guide has a detailed table of contents and an index to help you locate information quickly.

Conventions Used in this Guide

The following terms have specific meanings when used in this guide:

- *Form* refers to a screen or a window.
- *Table* generally means “file.”

We assume an “implied completion” at the end of a series of steps. That is, to complete the procedure described in the series of steps, either press Enter or click OK, except where noted.

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Glossary

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Overview



Quality Management Overview

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

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

The J.D. Edwards 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



Features

The Quality Management system includes the following features:

Tests

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

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

Specifications

Specifications enable you to group tests that belong together or should be performed together. For each specification, you can indicate effective date ranges to invalidate tests that are replaced or that become obsolete.

Some examples are mechanical, visual, and electronic specifications.

Item Test Specifications

After you define tests and specifications, you must create an item test specification. An item test specification is a type of preference profile that 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 where one customer might require higher tolerances of a test than another customer. You can use preference profiles to group the appropriate tests and customize them by customer.

Entering Test Results

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

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

- When entering receipts for items on purchase orders
- When routing receipts for purchase orders and work orders

-
- When moving items to stock after completed production
 - When entering hours and quantities
 - When confirming shipments or packages
 - When confirming ECS bulk or package loads
 - When entering sales orders
 - When reviewing lots

Reviewing Information

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

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

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

Entering Generic Text

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

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

System Integration

Quality Management works closely with features in the following systems:

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

Tables

The Quality Management system uses the following tables:

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 that are grouped within the specification.
Preference Profiles for Quality Management (F40318)	Identifies which tests or specifications are required for an item, item group, customer, or customer group.
Test Results (F3711)	Contains the test results for an item and lot number located on a work order, purchase order, sales order, or in inventory.
Test Results Work File (T3711W)	Contains test results if you have uploaded them from a LIM (Laboratory Information Management) system.
Certificate of Analysis (F37900)	Contains test results that print on the Certificate of Analysis or Product Test Report.
Non-Conforming Material (F3703)	Contains records of failed tests.

Test Definition Audit File (F37019)	Contains test definition additions, changes, and deletions.
Specification Audit File (F37029)	Contains specification additions, changes, and deletions.
Specification Audit Detail (F370219)	Contains specification detail additions, changes, and deletions.
Preference Profiles for Quality Management Audit File (F403189)	Contains preference profile additions, changes, and deletions.
Test Results Audit File (F37119)	Contains test result additions, changes, and deletions.

Menu Overview

The Quality Management system uses the following menus:

Quality Management (G37)



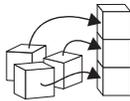
Daily and Periodic Processes

- Quality Management (G37)



Advanced and Technical Operations

- Advanced Quality Management (G3731)



System Setup

- Quality Management Setup (G3741)

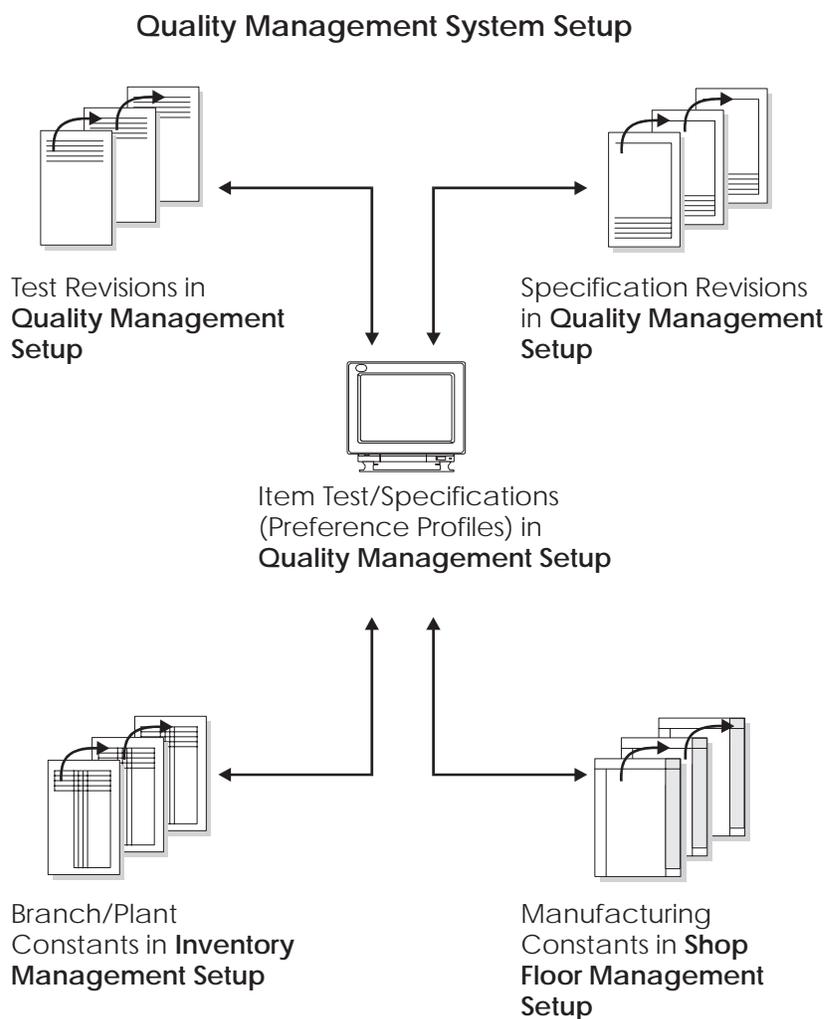
System Setup

System Setup

About System Setup

You can customize the Quality Management system to meet the specific testing needs of your business. When you activate Quality Management for each branch/plant, you can also activate logging of quality files in order to create audit reports. After you set up quality tests, you can group the tests into specifications. You can also define which tests to perform on items for a customer, and you can define which customers require a certificate of analysis.

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



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

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

Before You Begin

- For measuring item quality, activate lot control for the items you are measuring. See *Lot Processing* in the *Inventory Management Guide*.
- For measuring item quality, decide which characteristics to include in the test for each item you are measuring.

Set Up Branch/Plant Constants

Setting Up Branch/Plant Constants



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 you want to include in a quality test.

▶ To set up branch/plant constants

On Branch/Plant Constants

Branch/Plant	Description	Back	Loc	Ware	G/L	Inv Period	Approval Route Code
DC	Distribution Center	Y	Y	Y	Y	07	
10	Modesto Distribution Cent	Y	Y	N	Y	06	
19	Phoenix Branch	Y	N	N	Y	06	
20	Valley Forge Distribution	Y	Y	N	Y	06	
27	Eastern Area Distribution	Y	Y	Y	Y	06	
30	Memphis Distribution Cent	Y	N	N	Y	06	
40	Ft. Worth Distribution Ct	Y	Y	Y	Y	06	
55	Portland Branch	Y	N	N	Y	06	
56	Cheyenne Branch	Y	N	N	Y	06	
80	Boston Branch	Y	N	N	Y	06	
95	Miami Branch	Y	N	N	Y	06	
M10	Modesto Distribution Ctr	Y	N	N	Y	06	
M19	Phoenix Branch	Y	N	N	Y	07	
M20	Valley Forge Mfg/Dist. Ct	Y	N	N	Y	07	
M21	Subcontract Material Loca	Y	N	N	Y	07	

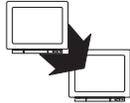
- To locate a specific branch plant, complete the following field:
 - Skip to Branch Plant
- Choose the Constants option.

3. On Branch/Plant Constants - Pg 1, complete the following field:
- Quality Management (Y/N)

Field	Explanation
Skip to Branch/Plant	<p>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.</p> <p>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.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p>..... <i>Form-specific information</i></p> <p>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.</p>
Quality Management (Y/N)	This flag indicates whether to activate the Quality Management system (System 37) for your branch/plant.

Set Up Manufacturing Constants

Setting Up Manufacturing Constants



From Shop Floor Management (G31), enter 29

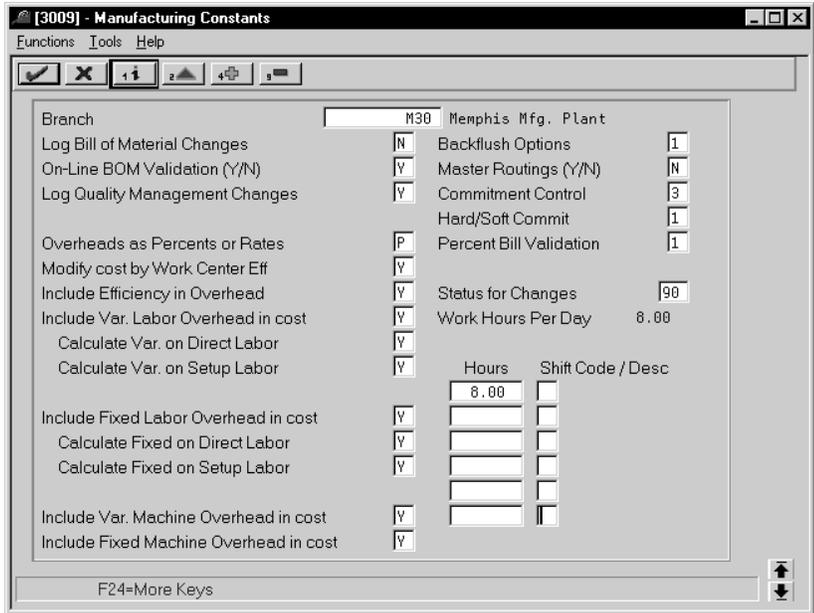
From Shop Floor Control Setup (G3141), choose Manufacturing Constants

To activate logging of Quality Management files, you must set the Log Quality Management Changes constant to Y. This constant enables the update programs to record changes, additions, and deletions to the following audit reports:

- Test Definitions Audit Report
- Specifications Audit Report
- Specifications Detail Audit Report
- Preference Quality Audit Report
- Test Results Audit Report

► To set up manufacturing constants

On Manufacturing Constants



Complete the following field:

- Log Quality Management Changes

Field	Explanation
Log Quality Management Changes	<p>Determines whether changes to Quality Management data are recorded in audit files. This includes additions, changes, and deletions. Valid values are:</p> <p>Y Yes, log changes N No, or blank, do not log changes</p> <p>When you log Quality Management changes, the system saves records as they appear before and after changes. When you set this option to Y, the system logs the following files:</p> <ul style="list-style-type: none"> • Test Definitions Master (F3701) • Specifications Definitions Master (F3702) • Specifications Detail (F37021) • Test Results (F3711) • Quality Management Preference Profile (F40318) <p>The Advanced Quality Management menu enables you to print the audit reports containing the changes.</p>

Set Up Tests

Setting Up Tests

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

For each test, you can define:

- The test description
- How to record results
- Test samples
- How to evaluate results
- The information to print on the certificate of analysis
- American Society of Testing Material (ASTM) reference numbers

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

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

After you set up tests, you can locate them in order to review or revise them. You can also print a test definition report.

Setting up tests consists of the following tasks:

- Defining tests
- Printing tests

See Also

- *Setting Up Preferences* for information on how to customize tests and specifications.

Defining Tests



From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Test Revisions

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

Defining tests consists of the following tasks:

- Entering new tests
- Entering user defined codes (optional)
- Entering text
- Locating tests

▶ To enter new tests

On Test Revisions

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

- Branch/Plant (optional)
- Test ID
- Description

- Test Method
- Property

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

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

- Test Type
- Numeric (1/0)
- Display/Evaluate
- Display Decimals
- System Code (optional)
- User Defined Code (optional)

For tests that are alphanumeric (enter 0 in the Numeric 1/0 field), you do not need to define a user defined code table. This allows free-form entry of test results. Any non-blank value in the test result passes.

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

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

- Allowed Minimum
- Preferred Minimum (optional)
- Target Value
- Results Unit of Measure (unlabeled field)
- Preferred Maximum (optional)
- Allowed Maximum
- Number of Samples
- Sample Percentage
- Accept Quantity
- Accept Percentage
- Sample Size
- Quality Unit of Measure (unlabeled field)

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. To identify a recommended testing procedure of the American Society of Testing Material, complete the following optional field, which is for information only:
 - ASTM

Field	Explanation
Description	A brief description of an item, a remark, or an explanation.
Test Method	A description of how to run a quality test. The test method is useful to both your company's Quality Control department and your customers. For example, Test: Viscosity Method: RVF #4 @10RPM Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.
Test Type	Controls how the system processes tests as you enter test results. For example: <ul style="list-style-type: none"> R Required – Result values are required during Results Entry. The system does not allow an item to pass quality inspection until you enter results for each required test. O Optional – Result values are optional during Results Entry. The system does not require the entry of a result for each optional test. However, if you input failing results, the item fails quality inspection. G Guaranteed – Result values are optional during Results Entry. You can control whether Guaranteed tests appear as you enter test results with the 'Display Test' field on Test Revisions. In addition, guaranteed tests print on the Certificate of Analysis.

Field	Explanation
Numeric (1/0)	<p>Determines whether a test result value will be numeric or alphanumeric.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> 1 Indicates that the result value is numeric and should be right justified. 0 Indicates that the result value is alphanumeric and should be left justified. Tests that are using alphanumeric result values can have User Defined Code tables setup that contain alpha to numeric translations. The purpose of these tables is to supply result evaluations with a way of determining whether a result is within the range of the minimum and maximum values.
Display/Evaluate	<p>A code that determines how test results appear in Test Results Inquiry when accessed from sales orders. This code also determines how a test is to be evaluated. Valid values are:</p> <ul style="list-style-type: none"> 0 Do not display tests when using Test Results Revisions or result inquiry programs. This value is only allowed for tests of type G, Guaranteed. 1 Display all occurrences of a test when using result inquiry programs. To provide for the entry of result values, all occurrences of a test appear in Test Results Revisions. The system uses all result values to determine if a lot passes or fails. 2 Display only the average result record when using result inquiry programs. All occurrences of a test appear in Test Results Revisions. The system uses only the average test result to determine if a lot passes or fails. 3 Display the last occurrence of a test when using result inquiry programs. The last occurrence is the test result last entered in Test Results Revisions. The system uses only the last test result to determine if a lot passes or fails.
Display Decimals	<p>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.</p> <p>..... <i>Form-specific information</i></p> <p>Determines the number of decimals in minimum and maximum values and in test results entry</p>

Field	Explanation
Print Test	<p>A code used to determine whether or not a test will print on the Certificate of Analysis. The valid values are:</p> <ul style="list-style-type: none"> 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.
System Code	<p>A user defined code (98/SY) that identifies a J.D. Edwards system.</p> <p>..... <i>Form-specific information</i></p> <p>The System Code and User Defined Code are used in combination to define test results and to associate an alphanumeric test result with a number and then evaluate the test.</p>
User Defined Code	<p>Identifies the table that contains user defined codes. The table is also referred to as a code type.</p> <p>..... <i>Form-specific information</i></p> <p>The System Code and User Defined Code are used in combination to define test results and to associate an alphanumeric test result with a number and then evaluate the test.</p>
Allowed Minimum	<p>The lowest value for a passing test result.</p>
Preferred Minimum Value	<p>The lowest value for the preferred test result. This value must be greater than or equal to the allowed minimum value. Use the preferred minimum value to measure quality to a more precise specification than a customer requests.</p> <p>Processing options for the Certificate of Analysis (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.</p>
Target Value	<p>The preferable or target test result within the test results range. As the system does not test against a target value, this field is for your information only.</p>
Results Unit of Measure	<p>A user defined code (37/UM) that identifies the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.</p>

Field	Explanation
Preferred Maximum Value	<p>The highest value for the preferred test result. This value must be less than or equal to the allowed maximum value. Use the preferred maximum value to measure quality to a more precise specification than a customer requests.</p> <p>Processing options for the Certificate of Analysis (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.</p>
Allowed Maximum	The highest value for a passing 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	<p>Indicates the quantity of tests that must pass in order for the test sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use this accept quantity value, you must complete the following fields on Test Definitions accordingly:</p> <p>Display/Evaluate 1 Accept Percentage Blank</p>
Accept Percentage	<p>Indicates the percentage of tests that must pass in order for the sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use the accept percentage value, you must complete the following fields on Test Definitions accordingly:</p> <p>Display/Evaluate 1 Accept Quantity Blank</p>
Sample Size	The quantity of one sample to be taken for the test. As the system does not use this field, it is for your information only.
Quality Unit of Measure	Identifies the unit of measure for a sample you take to test. Examples of units of measure include barrels, gallons, hours, and cubic yards.

► **To enter user defined codes**

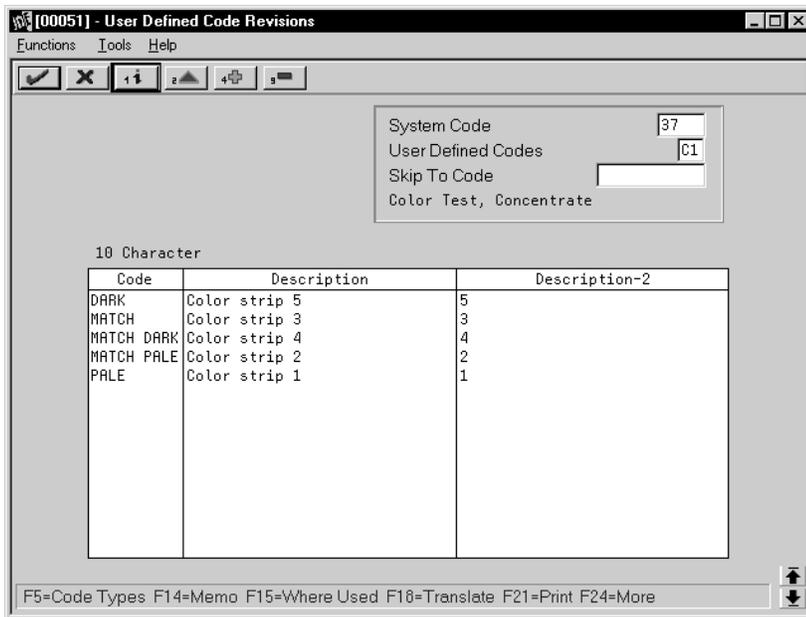
If you have set up alphanumeric test result values, you can set up a user defined code table that contains the alphanumeric results and their corresponding numeric values. The system uses this table to evaluate if an alphanumeric test result is within the range of minimum and maximum values.

For each user defined code, the second description column contains a numeric value that represents the value of the alphanumeric code. The second description number should be in the appropriate format for your decimal environment, including the use of separators (such as commas or decimals). For example, for an alphanumeric test result of color in a three-decimal environment, you might enter the following descriptions:

Description	Description-2
Clear1	1.000
Yellow2	2.000
Amber3	3.000

On Test Revisions

1. Choose the User Defined Codes function.



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 descriptive or instructional text for the test.

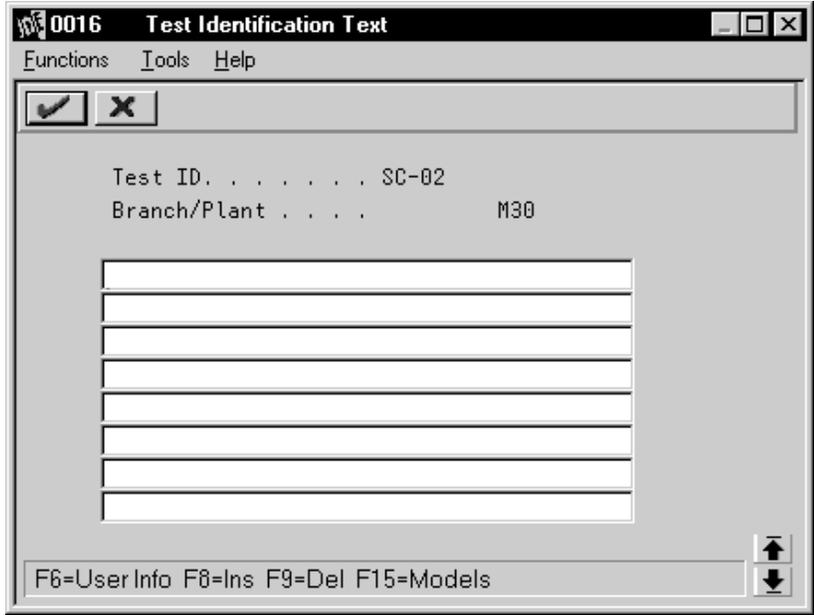
Field	Explanation
Skip To Code	To begin the information displayed on the form with a specific user defined code, enter the code in this field.
Code	This column contains a list of valid codes for a specific user defined code list. The number of characters that a code can contain appears in the column title.
Description	A user defined name or remark.
Description-2	Additional text that further describes or clarifies a field in J.D. Edwards systems. <i>Form-specific information</i> This column must contain a numeric value that represents the value of the alphanumeric code.

▶ To enter text

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

On Test Revisions

1. To locate a specific test, complete the following fields:
 - Branch/Plant
 - Test ID
2. Choose the Memo function.



3. On Test Identification Text, type the appropriate text.

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

See Also

- *Processing Options for Test Results Revisions* in *Work with Test Results*

Processing Options for Test Identification Text

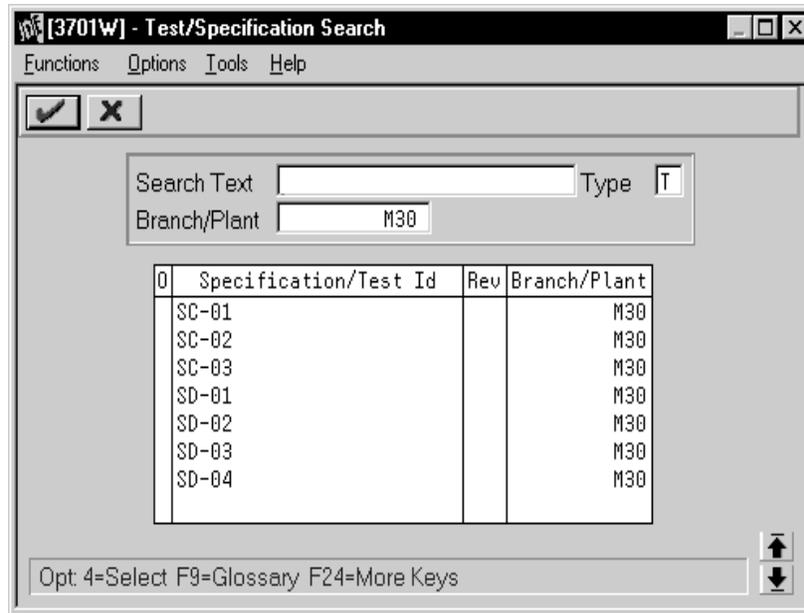
Enter the Desired System Code. _____
Enter the Desired Record Type. _____
Enter a "Y" if you desire an "80"
character text line. _____

To locate tests

After you enter tests, you can locate all tests for a branch/plant in order to review or revise them.

On Test Revisions

1. Press F1 in the following field:
 - Test ID



2. On Test/Specification Search, complete the following fields:
 - Search Text
 - Branch/Plant
 - Type
3. To review or 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

Printing Tests



From Quality Management (G37), enter 29

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

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

37410		J.D. Edwards & Company				Page 2				
		Test Definition Report				Date 4/30/05				
		T				Sample				
Test Identification	Description	Branch Plant	P	Minimum Value	Maximum Value	Target Value	U/M	NO.	M	C
SC-01	Test electrolyte levels	M30	R	0.80	0.84	0.82	25 ML	4	1	2
Property :	Average Test . .	Test Cat Code 1 :	002	Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : /	Test Cat Code 2 :	DES	Test Cat Code 4 :						
SC-02	Test Color - Test strip #50	M30	R	MATCH PALE	MATCH DARK	MATCH	1	4	0	0
Property :	Average Test . .	Test Cat Code 1 :	002	Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : 37 / C1	Test Cat Code 2 :	NON	Test Cat Code 4 :						
SC-03	Test concentration level	M30	R	0.23	0.26	0.25	20 ML	5	1	2
Property :	Average Test . .	Test Cat Code 1 :	002	Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : /	Test Cat Code 2 :	DES	Test Cat Code 4 :						
SD-01	Check bottled drink color	M30	R	1	2	2	1 BT	2	1	0
Property :	Average Test . .	Test Cat Code 1 :	003	Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : /	Test Cat Code 2 :	NON	Test Cat Code 4 :						
SD-02	Check fill level	M30	G	LEVEL	OVER	LEVEL	1	1	0	0
Property :	Average Test . .	Test Cat Code 1 :	002	Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : 37 / F1	Test Cat Code 2 :	NON	Test Cat Code 4 :						
SD-03	Verify safety seal	M30	R	YES	YES	YES	1			0
Property :	Average Test . .	Test Cat Code 1 :	004	Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : 37 / YN	Test Cat Code 2 :	NON	Test Cat Code 4 :						
SD-04	Verify bottles clear of debris	M30	R	YES	YES	YES	1	1	0	0
Property :	Average Test . .	Test Cat Code 1 :	001	Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : 37 / YN	Test Cat Code 2 :	PV	Test Cat Code 4 :						
WATER	Percentage of Water	DEPOT1	R	1.00	2.00	1.50	1	1	1	2
Property :	Average Test . .	Test Cat Code 1 :		Test Cat Code 3 :		Test Cat Code 5 :				
	UDC : /	Test Cat Code 2 :		Test Cat Code 4 :						

Set Up Specifications

Setting Up Specifications

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

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

For each specification, you can define:

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

Setting up specifications consists of the following tasks:

- Defining specifications
- Printing specifications

Defining Specifications



From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Specification Revisions

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

Defining specifications consists of the following tasks:

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

▶ To enter specifications

On Specification Revisions

Seq	Test ID	Branch/Plant	Minimum	Maximum
1	SD-01	M30	1	2
2	SD-02	M30	LEVEL	OVER
3	SD-03	M30	YES	YES
4	SD-04	M30	YES	YES
5				
6				
7				
8				
9				

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

- Branch/Plant (optional)
- Specification
- Description
- Revision Level

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

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 sequence and group the tests within a specification, complete the following fields:
 - Seq
 - Test ID
 - Branch/Plant

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

Field	Explanation
Revision Level	An alphanumeric character that represents the number of times a specification has changed. To avoid overlapping revisions, the system verifies that the start dates of revisions are greater than the end dates of other revisions.
Effective From	<p>A date that indicates one of the following:</p> <ul style="list-style-type: none"> • 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 <p>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.</p> <p>..... <i>Form-specific information</i></p> <p>This date indicates the date a specification becomes effective.</p>

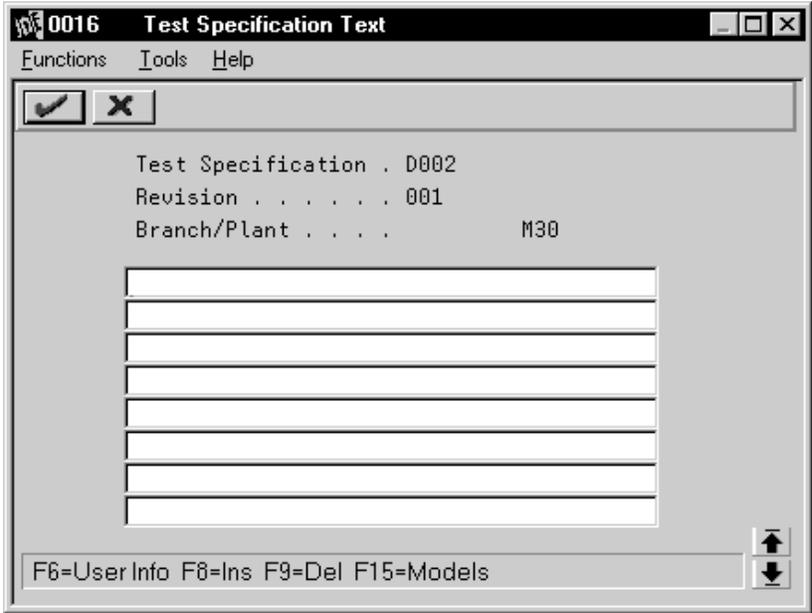
Field	Explanation
Effective Thru	<p>A date that indicates one of the following:</p> <ul style="list-style-type: none"> • When a component part is no longer in effect on a bill of material • When a routing step is no longer in effect as a sequence on the routing for an item • When a rate schedule is no longer active <p>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.</p> <p>..... <i>Form-specific information</i></p> <p>This date indicates the last date a specification is effective.</p>
Category Code 1	<p>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).</p> <p>Examples:</p> <ul style="list-style-type: none"> Category code S1 – Specification Group Category code S2 – FDA Code
Seq	<p>A number used to determine the sort order of tests and specifications within Item/Test Specifications.</p>

▶ **To enter text**

You can use generic text to add instructions related to a specification.

On Specifications Revisions

1. To locate a specification, complete the following fields:
 - Branch/Plant
 - Specification
2. Choose the Memo function.



3. On Test Specification Text, type any additional instructions.

The message See Memo appears on Specification Revisions for specifications containing text.

► 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 greater than the end dates for other revisions.

On Specification Revisions

1. Complete the following fields:
 - Branch/Plant
 - Specification
2. Choose the Specification Revision Levels function.

The screenshot shows a window titled "[3702w] - Specification Selection" with a menu bar (Functions, Options, Tools, Help) and a toolbar with a checkmark and an 'X' button. Below the toolbar are three input fields: "Specification" with the value "D002", "Branch/Plant" with the value "M30", and "Skip to Revision" which is empty. Below these fields is a table with the following data:

0	Rev	Description	Branch	Effective Dates	
				From	Thru
	001	Fill Tests	M30	07/10/97	12/31/10

At the bottom of the window, there is a status bar with the text "Opt: 4=Select F24=More Keys" and a vertical scroll bar.

3. On Specification Selection, review the following fields:
 - Rev (Revision Level)
 - Branch
 - Effective From
 - Effective Thru
4. To work with a revision level, choose the Select option.

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

Printing Specifications



From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Specifications Report

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

Specification ID	Description	Branch Plant L	Lvl	Code 1	Code 2	Code 3	Code 4	Code 5	From	Thru
37415 J.D. Edwards & Company Page . . . 2 Test Specification Report Date . . . 4/30/98 Rev ---- SPECIFICATION CATEGORY ---- Effective Date										
D001	Concentrate Tests	M30 001							07/10/97	12/31/10
Tests :	Description :									
SC-01	Test electrolyte levels									
SC-02	Test Color - Test strip #									
SC-03	Test concentration level									
D002	Fill Tests	M30 001							07/10/97	12/31/10
Tests :	Description :									
SD-01	Check bottled drink color									
SD-02	Check fill level									
SD-03	Verify safety seal									
SD-04	Verify bottles clear of d									

Set Up Preferences

Setting Up Preferences

In Quality Management, preferences enable you to customize tests and specifications. A specification is a group of tests that will be performed at the same time. 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 this information to control your access to Quality Management forms from other systems.

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

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

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

Setting up preferences consists of the following tasks:

- Defining item test specifications
- Entering text
- Printing item test specifications

Before You Begin

- Review *Preference Profiles* in the *Sales Order Management Guide*

Defining Item Test Specifications



From Quality Management (G37), enter 29

From Quality Management Setup (G3741), choose Preference Profiles

After you define tests and specifications, you define which tests to perform by setting up preferences. You use a type of preference called an item test specification to customize tests and specifications. You can set up preferences for:

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

You can also limit each preference to a specific branch/plant. If you do not enter a branch/plant for a preference, the preference applies to all branch/plants.

If you are defining tests and entering test results by customer, the customers must be set up in Address Book. Any items used in Quality Management must be set up in the Item Master and Branch/Plant files. In addition, lot control is required for the items.

When the system recalls test results from another program, such as Purchasing Receipts, the system uses the hierarchy that you set up to search preference profiles for information affecting the customer and item combination. The system uses this information to select test results.

After you define item test specifications, you can locate them from the following forms:

- Test Results Revisions
- Bill of Material Revisions
- Item Branch/Plant Information
- Work Order Entry

Defining item test specifications consists of the following tasks:

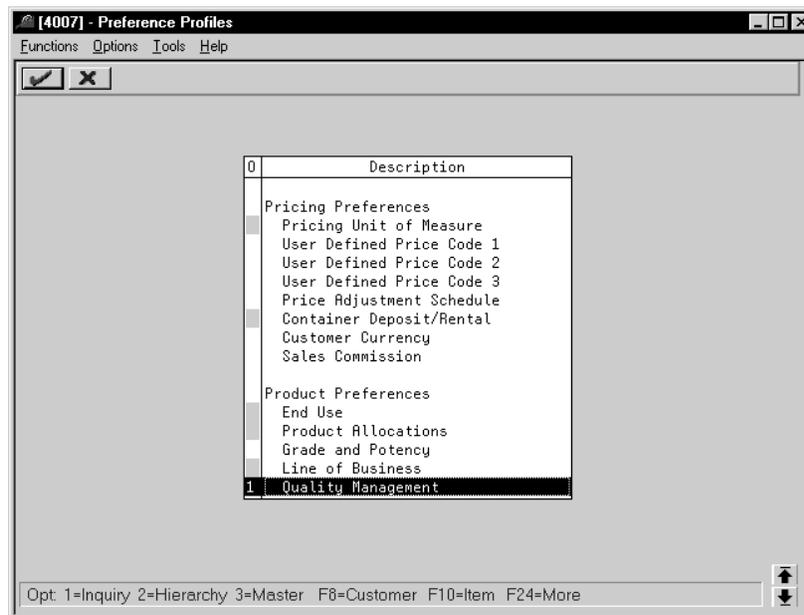
- Defining preferences
- Splitting specifications

Before You Begin

- If you are defining tests and entering test results by customer, set up the customers in Address Book. See *Entering Address Book Records* in the *Address Book Guide*.
- If you are defining tests and entering test results by item, set up the item numbers in the Item Master, Branch/Plant, and Lot Control files. See *Entering Item Master Information* and *Entering Branch/Plant Information* in the *Inventory Management Guide*.
- If you are defining tests and entering test results by customer group or item group, set up the groups. See *Assigning Customers and Items to Groups* in the *Sales Order Management Guide*.
- Set up the hierarchy for preference profiles. See *Working with the Preference Master and Hierarchy* in the *Sales Order Management Guide*.

▶ To define preferences

On Preference Profiles



1. Choose the Quality Management option.

The screenshot shows a software window titled "[40300] - Quality Management". It has a menu bar with "Functions", "Options", "Tools", and "Help". Below the menu bar is a toolbar with several icons. The main area contains a form with the following fields:

- Customer Number:
- OR Customer Group:
- Item Number: Line Sport Drink
- OR Item Group:
- > Branch/Plant:

Below the form is a table with the following data:

0	Seq	T	Test/Specification	Rev	Branch/Plant	. . Effective . .	
						From	Thru
	1	S	0002	001	M30	07/10/97	12/31/10
	2						
	3						
	4						
	5						
	6						
	7						
	8						

At the bottom of the window, there is a status bar with the text "F9=Previous F14=Memo F24=More Keys" and a vertical scroll bar icon.

2. On Quality Management, complete the following optional field:
 - Branch/Plant
3. Complete at least one of the following fields to define the preference:
 - Customer Number
 - Customer Group
 - Item Number
 - Item Group
4. To define the tests and/or specifications that make up the preference, complete the following fields:
 - Test Sort Sequence Number (Seq)
 - Test/Specification Flag (T or S)
 - Test/Specification
 - Specification Revision (Rev)
 - Branch/Plant
 - Effective From
 - Effective Thru
5. Access the detail area.

[40300] - Quality Management

Functions Options Tools Help

Customer Number

OR Customer Group

Item Number Line Sport Drink

OR Item Group

> Branch/Plant

0	Seq	T	Test/Specification	Rev	Branch/Plant	Effective From	Effective Thru
	1	T	SD-01		M30	07/10/97	12/31/10
Check bottled drink color							
Test Type R							
Allowed Minimum				1	Property		
Target				2	Test Method		
Allowed Maximum				2	Number of Samples		2
Preferred Minimum					Sample Percentage		
Preferred Maximum					Accept Quantity		2
					Accept Percentage		
					Print Test		1

F9=Previous F14=Memo F24=More Keys

- If you entered a test specification flag of T, you can override testing and sampling information from the original test definition by completing the appropriate fields. The information displayed is not stored in the preference unless it is overridden from the test.
- From the Options menu, choose Display Criteria.

[40318W] - Display Criteria Window

Functions Tools Help

Input Test Results During:

	Seq	Typ
Manufacturing Operations	1	M
Manufacturing Receipt Routing	1	
Manufacturing Completions	1	
Purchasing Receipts	1	
Purchasing Receipt Routing	1	
Ship Confirm	1	
Bulk Load Confirm	1	

F24=More Keys

8. Complete the following fields for those program descriptions where you want to perform quality testing:
 - Manufacturing Operations
 - Seq
 - Typ
 - Manufacturing Receipt Routing
 - Seq – Operations
 - Manufacturing Completions
 - Purchasing Receipts
 - Purchasing Receipt Routing
 - Ship Confirm
 - Bulk Load Confirm

For example, to enter test results during Work Order Inventory Completions, enter 1 in Manufacturing Completions. This activates Test Results Revisions when you enter a work order completion.

You can access the field help to see the specific programs that will be affected.

You must activate at least one program on Display Criteria.

► To split specifications

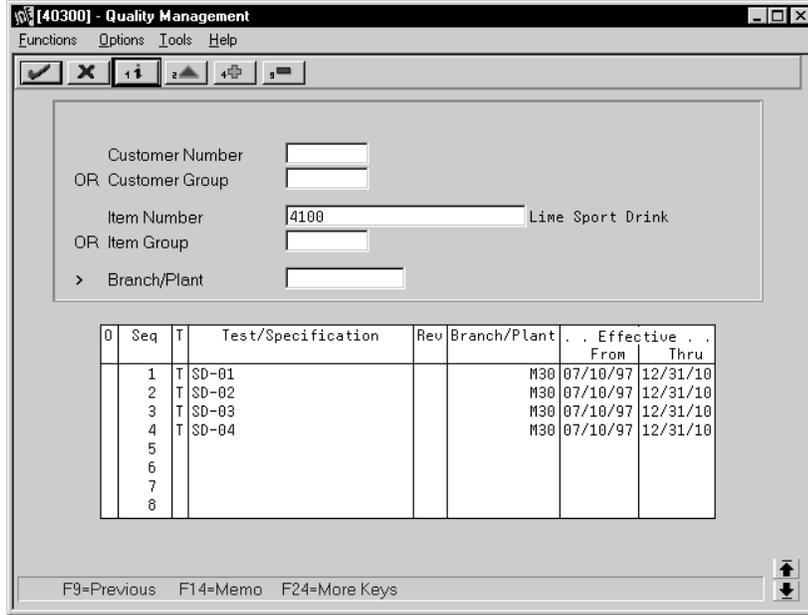
You can split a specification to view its corresponding group of tests.

On Preference Profiles

1. Choose the Quality Management option.

0	Seq	T	Test/Specification	Rev	Branch/Plant	Effective From	Effective Thru
	1	S	0002	001	M30	07/10/97	12/31/10
	2						
	3						
	4						
	5						
	6						
	7						
	8						

2. On Quality Management, complete the following optional field:
 - Branch/Plant
3. Complete at least one of the following fields to locate a preference:
 - Customer Number
 - Customer Group
 - Item Number
 - Item Group
4. For a specification, choose Split Specification from the Options menu.



5. Review the separate tests that replace the specification.

Field	Explanation
Customer Number	<p>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.</p> <p>..... <i>Form-specific information</i></p> <p>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.</p> <p>If you leave both the Customer Number and Customer Group fields blank, the system applies the preference to all customers.</p> <p>For Agreement Penalty Schedules: Enter the partner's address number.</p>

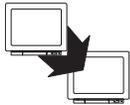
Field	Explanation				
Customer Group	<p>User defined code (system 40, type 18) identifying a group to which you can assign customers for the Item/Test Specifications. Do this when the customers are similar and you want to group them together to define preferences quickly and easily.</p> <p>Enter the 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.</p> <p>If you leave both the Customer Number and the Customer Group fields blank, the system applies the preference to all customers.</p>				
Item Number	<p>A number that the system assigns to an item. It can be in short, long, or 3rd item number format.</p> <p>..... <i>Form-specific information</i></p> <p>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.</p> <p>If you leave both the Item Number and Item Group fields blank, the system applies the preference to all items.</p>				
Item Group	<p>Item types that a item can be grouped into for each of the different preference types.</p>				
Seq	<p>A number used to determine the sort order of tests and specifications within Item/Test Specifications.</p>				
Manufacturing Operations	<p>Controls whether a test will display on the Test Results Revisions form when you access test results from any of the following Manufacturing programs:</p> <ul style="list-style-type: none"> • Co/By Product Completions (P31115) • Super Backflush (P31123) • Work Order Employee Time Entry (P311221) <p>Valid values are:</p> <table data-bbox="776 1440 1377 1528"> <tr> <td>1</td> <td>The test will appear in Test Results Revisions.</td> </tr> <tr> <td>0</td> <td>The test will not appear in Test Results Revisions.</td> </tr> </table> <p>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.</p>	1	The test will appear in Test Results Revisions.	0	The test will not appear in Test Results Revisions.
1	The test will appear in Test Results Revisions.				
0	The test will not appear in Test Results Revisions.				

Field	Explanation
Seq	<p>In routings, use this number to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.</p> <p>In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Management system uses this field in the backflush/preflush by operation process.</p> <p>In engineering change orders, use this number to sequence the assembly steps for the engineering change.</p> <p>In Repetitive Manufacturing, this number identifies the sequence in which an item is scheduled to be produced.</p> <p>Skip To fields allow you to enter an operation sequence that you want to begin the display of information.</p> <p>You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.</p> <p>..... <i>Form-specific information</i></p> <p>On the Display Criteria Window, although a default number might be defined for this data dictionary item, the Quality Management Preference Profiles does not use the default value. Instead, you can define a specific operation sequence number where you want to perform the test.</p>
Typ	<p>User defined code (system 40, type TR) that designates the type of routing. You can define different types of routing instructions for different uses.</p> <p>For example:</p> <ul style="list-style-type: none"> M Standard Manufacturing Routing RWK Rework Routing RSH Rush Routing <p>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.</p> <p>Product Costing and Capacity Planning systems use only M type routings.</p>

Field	Explanation
Manufacturing Receipt Routing	<p>Controls whether a test will display on the Test Results Revisions form when you access test results from the Routing Movement and Disposition (P43250) program when the routed order is a manufacturing work order.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions. <p>You can use this value with the operation sequence to control the appearance of the test at a route operation.</p>
Sequence Number – Operations	<p>The sequence in which the system performs the operations or steps of the route.</p> <p>..... <i>Form-specific information</i></p> <p>On the Display Criteria Window, the sequence in which the system performs the operations or steps of the routing.</p>
Manufacturing Completions	<p>Controls whether the test will display on the Test Results Revisions form when you access test results from either of the following Manufacturing programs:</p> <ul style="list-style-type: none"> • Work Order Inventory Completions (P31114) • Completions Workbench (P3119) <p>Valid values are:</p> <ul style="list-style-type: none"> 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.
Purchasing Receipts	<p>Controls whether a test will display on the Test Results Revisions form when you access test results from either Receipts by P/O or Receipts by Item (P4312). Valid values are:</p> <ul style="list-style-type: none"> 1 The test will appear in Test Results Revisions. 0 The test will not appear in Test Results Revisions.
Purchasing Receipt Routing	<p>Controls whether the test will display on the Test Results Revisions form when you access test results from Routing Movement and Disposition (P43250) and the routed order is a purchase order. Valid values are:</p> <ul style="list-style-type: none"> 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions. <p>You can use this value with the operation sequence to control the appearance of the test at an operation.</p>

Field	Explanation
Ship Confirm	Controls whether the test will display on the Test Results Revisions form when you access test results from the Ship Confirmation (P4205) program. Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.
Bulk Load Confirm	Controls whether the test will display on the Test Results Revisions form when you access test results from one of the following programs: <ul style="list-style-type: none">• Bulk Confirm by Order or Bulk Confirm by Trip (P49510)• Packaged Load Confirmation (P49530) Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.

Entering Text



From Quality Management (G37), enter 29

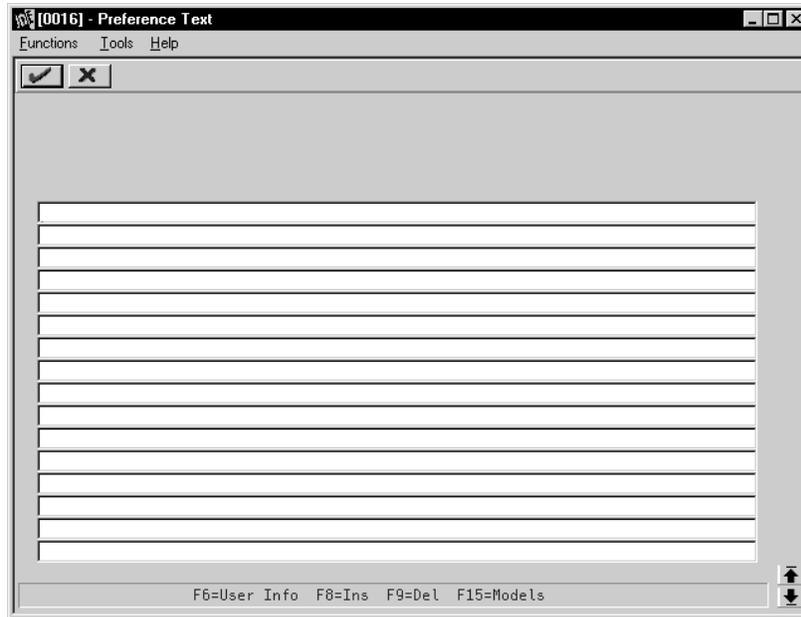
From Quality Management Setup (G3741), choose Preference Profiles

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 Preference Profiles

1. Choose the Quality Management function.
2. On Quality Management, choose the Memo function.



3. On Preference Text, type text.

The message See Memo appears for item test specifications that contain text.

Printing Item Test Specifications



From Quality Management (G37), enter 29

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

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

Processing Options for Item Test Specifications Report

REPORT DETAIL:

1. Enter a '1' to print test detail for each specification selected. If left blank, only the specification will be printed.

Example: Item Test Specification Report

37420

J.D. Edwards & Company
Item Test/Specification Report

Page 2
Date 4/30/98

Customer Number .
Customer Group .
Item Number . . . 4100 Lime Sport Drink
Item Group . . .
Branch/Plant . . .

S Test/Specification	Description	Branch/Plant	Rev	* Effective Date *		Minimum	Maximum	Target
				From	Thru			
S D002	Fill Tests	M30	001	07/10/97	12/31/10			
Test:								
T SD-01	Check bottled drink color	M30		07/10/97	12/31/10		1	2
T SD-02	Check fill level	M30		07/10/97	12/31/10	LEVEL	OVER	LEVEL
T SD-03	Verify safety seal	M30		07/10/97	12/31/10	YES	YES	YES
T SD-04	Verify bottles clear of debris	M30		07/10/97	12/31/10	YES	YES	YES

Customer Number .
Customer Group .
Item Number . . . 4110 Lime Sport Concentrate
Item Group . . .
Branch/Plant . . .

S Test/Specification	Description	Branch/Plant	Rev	* Effective Date *		Minimum	Maximum	Target
				From	Thru			
S D001	Concentrate Tests	M30	001	07/10/97	12/31/10			
Test:								
T SC-01	Test electrolyte levels	M30		07/10/97	12/31/10	0.80	0.84	0.82
T SC-02	Test Color - Test strip #50	M30		07/10/97	12/31/10	MATCH PALE	MATCH DARK	MATCH
T SC-03	Test concentration level	M30		07/10/97	12/31/10	0.23	0.26	0.25

Customer Number . 505 Consignment Agent
Customer Group .
Item Number . . . ACE Acetone Bulk
Item Group . . .
Branch/Plant . . .

S Test/Specification	Description	Branch/Plant	Rev	* Effective Date *		Minimum	Maximum	Target
				From	Thru			
T WATER	Percentage of Water	DEPOT1		07/10/97	12/31/10	1.00	2.00	1.50

Review Tests and Specifications

Reviewing Tests and Specifications



From Quality Management (G37), enter 29

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

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

► To review tests and specifications

On Test/Specification Where Used

T	Test/Specification	Description	Rev	Effective From	Thru
S	D001	Concentrate Tests	001	07/10/97	12/31/10

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

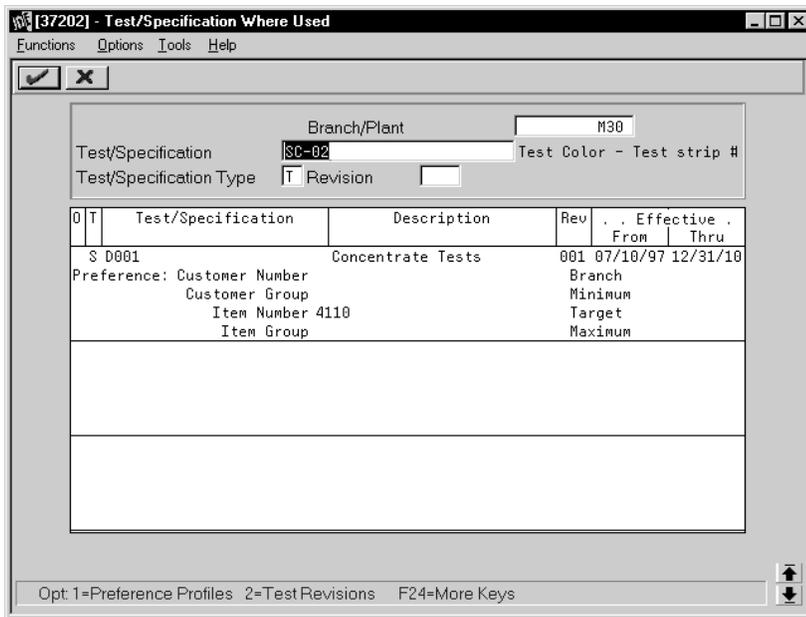
- Branch/Plant
- Test/Specification
- Revision

You can review a specific test or specification for all of your branch/plants by entering an asterisk (*) for the branch/plant.

2. Complete the following field:

- Test/Specification Type

3. Access the detail area.



4. Review the profile information.

5. If you need to make changes, select the record you want to change, then choose an option.

Field	Explanation
Test/Specification 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

Set Up Inclusion Rules for Tracing Test Results

Setting Up Inclusion Rules for Tracing Test Results



From Quality Management (G37), enter 29

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

In order to trace test results and to print certificates of analysis, you must set up inclusion rules. Inclusion rules enable you to limit the Item Ledger transactions that the system processes when you trace test results for a specific lot.

When you trace test results, you can see which lots are within a parent lot and all tests for the parent and these lots. Tracing helps you find test results for components of an assembled item, or for an item that has been re-classified.

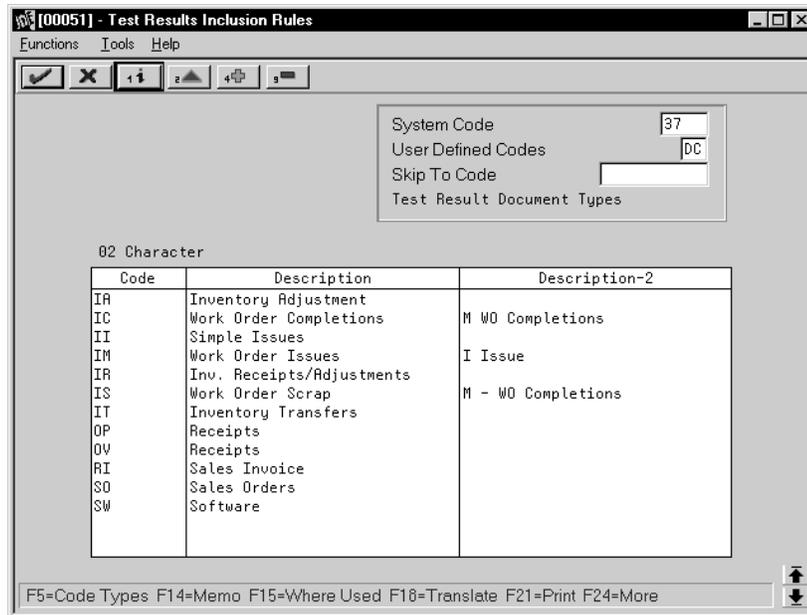
The system traces a lot by associating corresponding transactions, such as a receipt, an issue, a completion, and a sales order. If you do not include the documents in the inclusion rules, the system stops tracing the lot. For example, if you do not include the completion document type in inclusion rules,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

See Also

- *Tracing Test Results*

► **To set up inclusion rules for tracing test results**

On Test Results Inclusion Rules



For each document type, complete the following fields:

- 02 Character Code
- Description

Set Up Customer Billing Instructions

Setting Up Customer Billing Instructions



From Sales Order Management (G42), choose Customer Revisions

From Customer Revisions (G4221), choose Customer Billing Instructions

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

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

Before You Begin

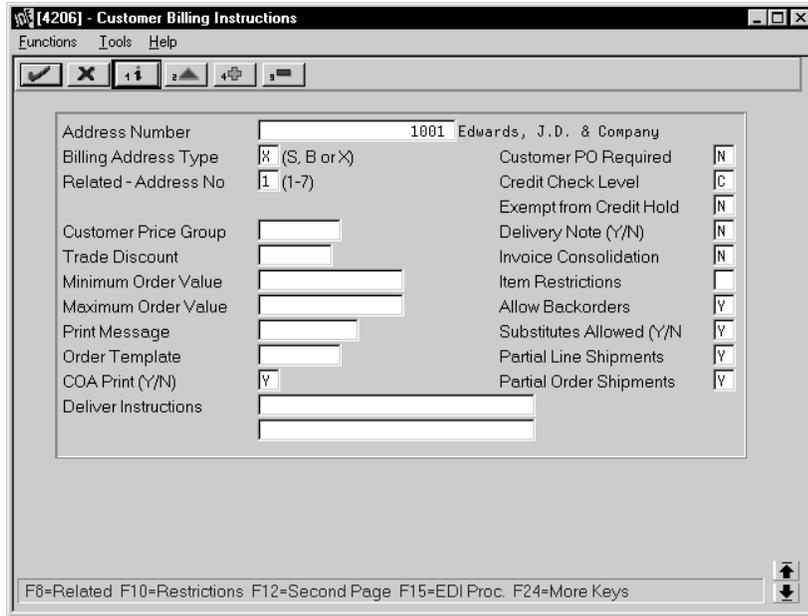
- Ensure that you have set up tests with the appropriate Print Test Flags to control which tests print on the certificate of analysis. See *Defining Tests*.

See Also

- *Printing a Certificate of Analysis*

► **To set up customer billing instructions**

On Customer Billing Instructions



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.

Test Results Processing



Test Results Processing

About Test Results Processing

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

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

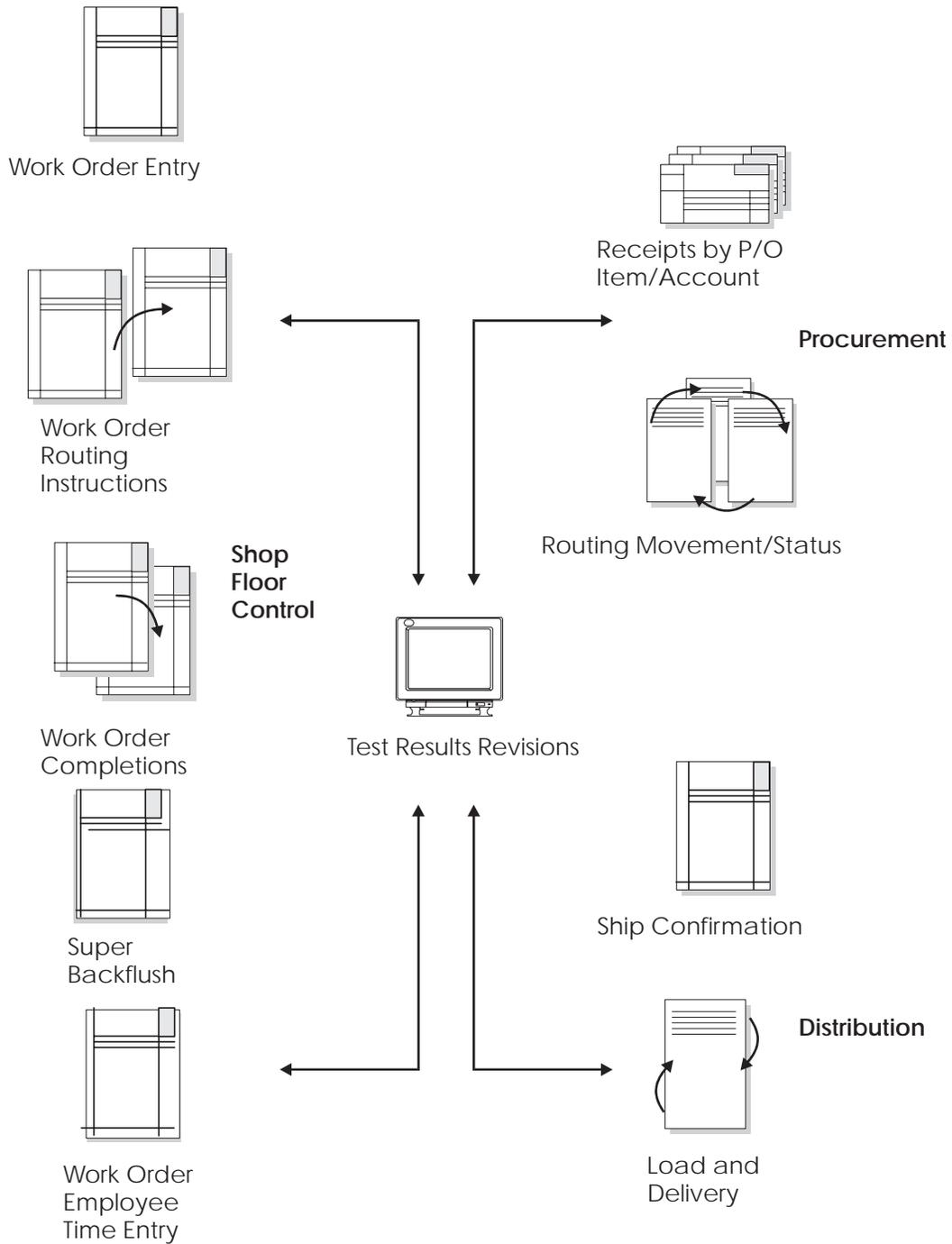
- When you enter a receipt for an item on a purchase order
- At any operation sequence during purchasing receipts routing, when you record the movement of a received item
- When you record completions at operations during the manufacturing process
- When you complete the item after the manufacturing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

See Also

- *Defining Item Test Specifications*



The following illustration shows which programs access Quality Management information:



Test results processing consists of the following tasks:

- Working with test results
- Reviewing test results

Work with Test Results

Working with Test Results

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

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

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

- Test entry format
- Lot status

You can enter test results in preference, order number, or ECS trip format. The format depends on how you set a Display Control processing option for Test Results Revisions. The system uses header information to select tests and samples through preference profiles. The test entry formats organize test results as follows:

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

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

For information on searching for tested lots for sales orders, see the supplemental documentation for the *Sales Order Management Guide*.

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

If you set processing options for failed and passed lot status:

This prevents lots from being sold or shipped until you finish testing and the lots pass inspection.

- To hold lots that have either failed quality inspection or have not been tested yet, set the lot to a non-blank status as soon as it is brought into inventory. You might use a status of Q for awaiting quality testing. This prevents the lot from being chosen by Sales Order Entry or Ship Confirm.
- If the lot fails inspection, you might change the status to F for failed inspection.
- Once the lot passes inspection, you can change the status to blank so it is available.

If you do not set processing options for failed and passed lot status:

This allows lots to be sold or shipped. Any program that selects items from inventory can choose the lots, as they are considered to be available.

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

- alphanumeric (Numeric 1/0 field on Test Revisions = 0), and
- are not set up with a user defined code table.

For tests that are not set up with a user defined code table, any value in the test result passes, provided it is a non-blank.

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

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

- Move and Disposition
- Trip Create/Maintenance
- Load and Delivery Confirmation

Note how you can use test results with the following program functions:

Work Order Entry	As you create a work order, you can: <ul style="list-style-type: none">• Use Preference Profiles to maintain tests for the parent item.• Maintain generic text to indicate when to test materials and which test to use.
Work Order Completions	As you enter work order completions, including quantity completed and quantity scrapped, you can: <ul style="list-style-type: none">• Access Test Results Entry for any items requiring testing upon completion.• Review work order generic text.• Set processing options for default lot, work order, and operation status.
Super Backflush	As you backflush labor and material for a work order, you can: <ul style="list-style-type: none">• 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: <ul style="list-style-type: none">• Access Test Results Entry for completed items that require testing.• Access generic text for the parent item.• Set processing options for work order and operation status.
Bill Revisions	As you maintain bills of material, you can: <ul style="list-style-type: none">• Use generic text to indicate the various tests to perform on an item.• Use Preference Profiles to maintain tests for the parent item.
Receipts by PO/Item/Account	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.

Sales Orders

As you enter sales orders, you can use Selection Criteria from Item Search to narrow your search for available inventory based on test results. Then use Item Search to select the lot that meets your criteria.

Working with test results consists of the following tasks:

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

Selecting Tests for Results Entry



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. If you access Test Results Revisions from another Manufacturing or Distribution program, the system completes the test header information. The system uses the header information to select the correct set of tests for results entry.

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

Selecting tests for results entry consists of one of the following tasks:

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

Before You Begin

- Set the processing option for Test Results Revisions to determine the test results entry format (preference, order number, or ECS trip format).
- Set the processing options for Test Results Revisions to determine the lot status for failed and passed lots.

▶ To select tests in preference format

On Test Results Revisions

0	Result Value	P	0	Test ID	Tester	Date Tested	Time Tested	Sample
				SD-01				1
				SD-01				2
				SD-04				1

1. To select the correct preference profile, complete the following fields:
 - Branch/Plant
 - Lot/SN
2. Complete the following fields as necessary:
 - Customer Number
 - Customer Group
 - Type
 - Item Number
 - Item Group



If you set Allow Duplicate Lots to 2 in System Constants, the Item Number field is required.

See *Setting Up Constants in Inventory Management*.

After you enter the appropriate data, the system searches preference profiles for a match. When the system finds a match, it displays the number of samples specified for the tests.

3. Enter your results for each test.

See *Entering test results*.

► To select tests in order number format

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

On Test Results Revisions

0	Result Value	P	O	Test ID	Tester	Date Tested	Time Tested	Sample
	2	P	0	SD-01		07/16/97	14:11:54	1
YES		P	0	SD-03		07/16/97	14:11:55	1
YES		P	0	SD-04		07/16/97	14:11:55	1
	2	P	0	SD-01		07/16/97	14:11:55	2
YES		P	0	SD-03		07/16/97	14:11:55	2
YES		P	0	SD-03		07/16/97	14:11:55	3
YES		P	0	SD-03		07/16/97	14:11:55	4
YES		P	0	SD-03		07/16/97	14:11:55	5

1. To identify the item test specification for which the test was defined, complete the following fields:
 - Branch/Plant
 - Order Number
 - Document Type (unlabeled field)

- Item Number
- Lot/SN

After you enter the appropriate data, the system searches preference profiles for a match. When the system finds a match, it displays the number of samples specified for the tests.

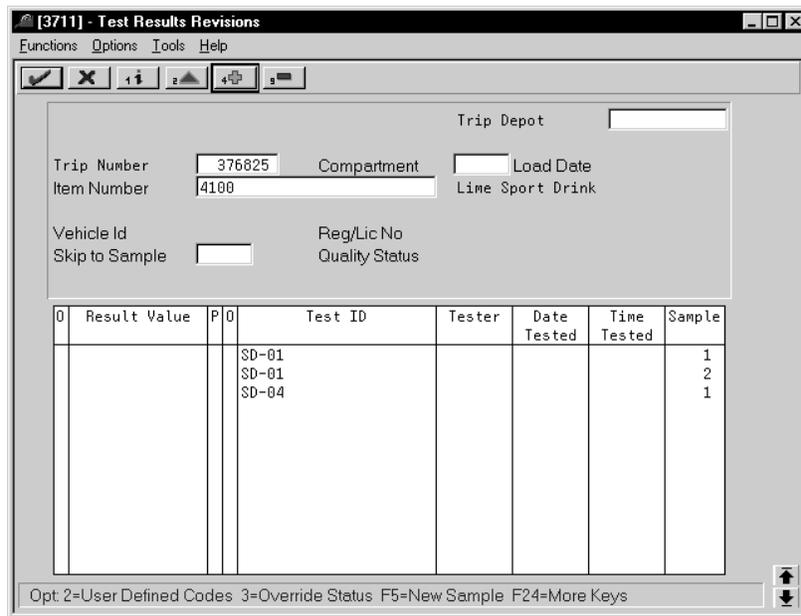
2. Enter your results for each test.

See *Entering test results*.

▶ To select tests in ECS trip format

When you add test results for the first time in ECS trip format, you cannot use the menu. You must access Test Results Revisions from a load and delivery confirmation program. This enables the system to select the appropriate tests from preference profiles.

On Test Results Revisions



1. To identify the item test specification for which the test was defined, review the following fields:
 - Trip Depot
 - Trip Number
 - Compartment
 - Item Number

After you enter the appropriate data, the system searches preference profiles for a match. When the system finds a match, it displays the number of samples specified for the tests.

2. Enter your results for each test.

See *Entering test results*.

Entering Test Results

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

After you have entered test header information in the appropriate format (preference, order number, or ECS trip), you can enter your test results. If you need to enter new tests, you can do so at any time on the blank lines.

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, based on the Display/Evaluate flag you defined in the test.

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

1 – All samples

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

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

2 – Average of all samples

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

3 – Last occurrence

The system retrieves the last sample you input for the test and determines if that sample passed.

The evaluation process uses the Acceptable Quantity on Test Definitions as the number of samples that must pass within a test. For example,

- if you have 4 samples of the color test, and
- if you set Acceptable Quantity to 2, then
- only 2 color samples must pass, in order for color to pass quality inspection for a test (not for the entire lot).

The evaluation process uses Acceptable Percentage on Test Definitions as the percentage of samples that must pass within a test. For example,

- if you have 10 samples of the color test, and
- if you set Acceptable Percentage to 50%, then
- only 5 color samples must pass, in order for color to pass quality inspection for a test (not for the entire lot).

If all the tests within a lot have a passing value, the system sets the lot status to the value you defined in the processing option for a passed status. If any test within a lot fails (based on all samples, average, or last occurrence), the system sets the lot status to the value you defined in the processing option for a failed status.

You can override the Pass/Fail flag to force the lot to pass. 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. See *Overriding Test Status*.

► To enter test results

On Test Results Revisions

1. After you have entered test header information in the appropriate format, complete the following field with test result information:
 - Result Value
2. Complete the following optional fields:
 - Tester
 - Date Tested
 - Time Tested

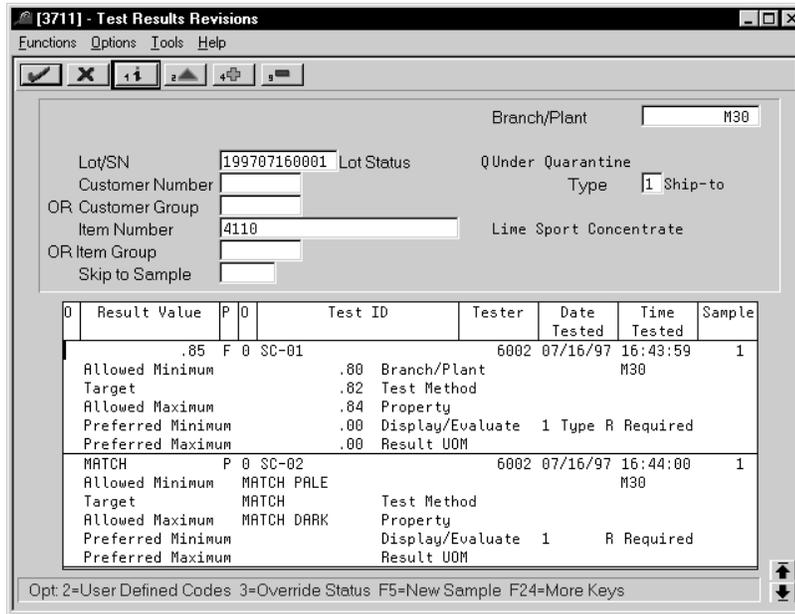
You can override the date and time defaults.

3. Access the detail area to see the test details.

The system displays the remaining fields with information from the test.

- After you have entered all test results, press Enter.

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



Field	Explanation
Lot/SN	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.
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.
Pass/	The value which identifies whether the test passed (P) or failed (F).
Lot Status	A user defined code (table 41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold. You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.

What You Should Know About

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.

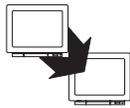
Creating non-conforming records

You can also use this program to write failed tests to the Non-Conforming Product file (F3703). Use the Non-Conforming Product program to view these records.

Failed test results

All failed test results appear in reverse image on screens that show test results, including Test Results Revisions and all inquiry screens.

Entering Text



From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Test Results Revisions

After you enter test results, you can enter informative text for those test results, such as a description of the measuring equipment that you used. If you set Print Text to Y in your test definition setup, this text prints on the certificate of analysis.

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

This task uses the Preference format as an example.

See Also

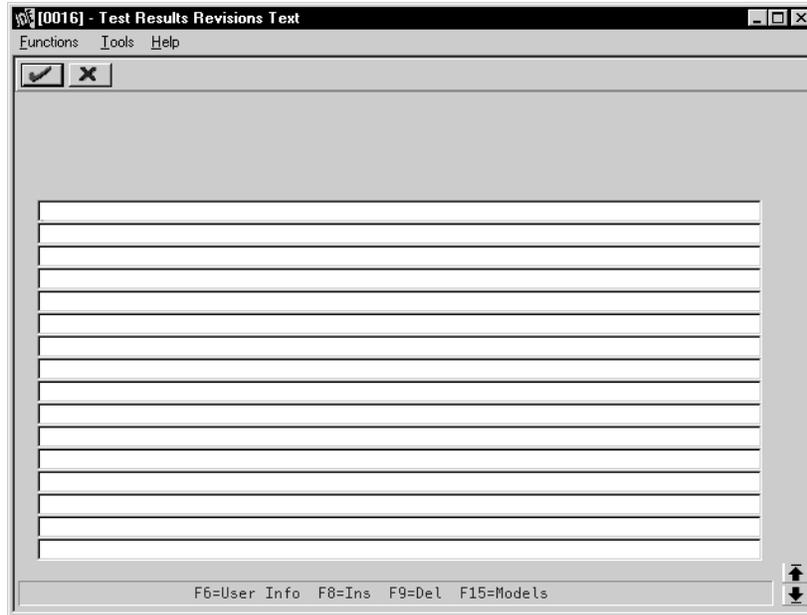
- *Setting Up Tests*

To enter text

On Test Results Revisions

0	Result Value	P	Test ID	Tester	Date Tested	Time Tested	Sample
	2	P 0	SD-01		07/16/97	14:11:54	1
	YES	P 0	SD-03		07/16/97	14:11:55	1
	YES	P 0	SD-04		07/16/97	14:11:55	1
	2	P 0	SD-01		07/16/97	14:11:55	2
	YES	P 0	SD-03		07/16/97	14:11:55	2
	YES	P 0	SD-03		07/16/97	14:11:55	3
5	YES	P 0	SD-03		07/16/97	14:11:55	4
	YES	P 0	SD-03		07/16/97	14:11:55	5

1. To locate an item for which you have entered test results, complete the following fields:
 - Branch/Plant
 - Lot/SN
 - Item Number
2. Select a test and choose the Generic Text option.



3. Type the additional information.

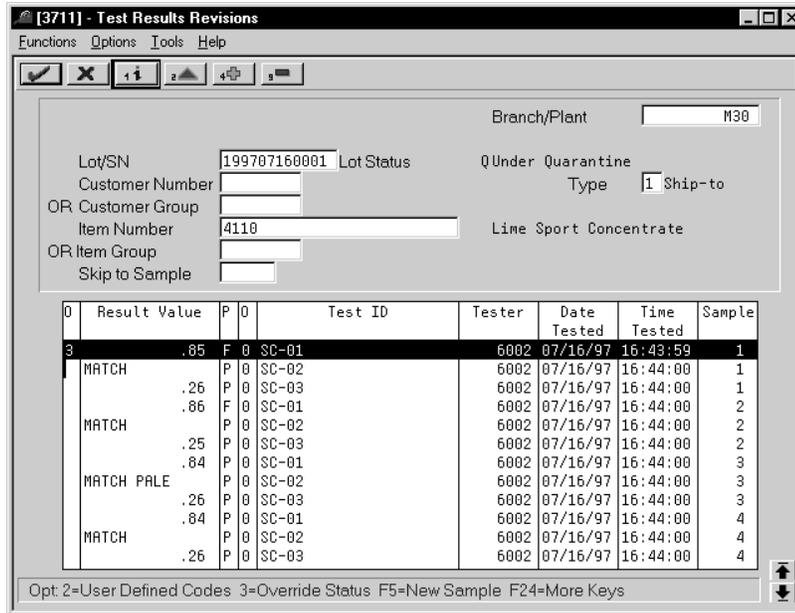
Overriding Test Status

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

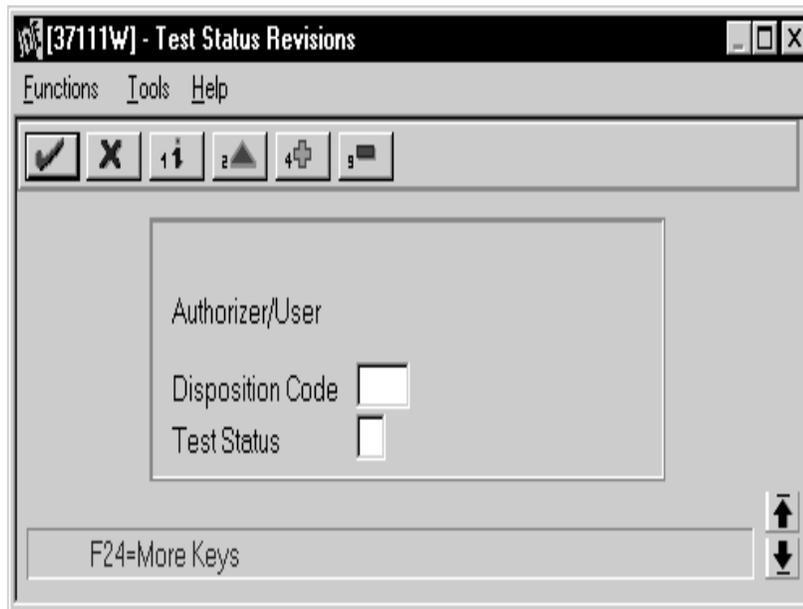
You should use action code security to secure this function so all users can review the status, but only users with correct authority can change the status.

▶ To override test status

On Test Results Revisions



1. To locate an item for which you have entered test results, complete the following fields:
 - Branch/Plant
 - Lot/SN
 - Item Number
2. Select the appropriate test result and choose the Override Status option.

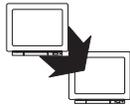


3. On Test Status Revisions, complete the following fields:
 - Disposition Code
 - Test Status
4. Access the Generic Text function to attach a memo describing why you changed the status of a test, and press Enter.

The system updates the Override code on Test Results Revisions.

Field	Explanation
Disposition Code	A user defined code (system 37/type DS) that explains the purpose of the test status change. For example, you can indicate the reason you are passing the failed test, such as the item will go through re-work or will be scrapped.
Test Status	The value which identifies whether the test passed (P) or failed (F).
Ovrr	The flag which designates whether a test has been overridden. Valid values are: <ul style="list-style-type: none"> • 1, overridden • 0, not overridden

Creating New Samples



From Manufacturing Systems (G3), choose Quality Management

From Quality Management (G37), choose Test Results Revisions

After you enter test results, you can create a new sample for re-testing purposes without having to create a new lot. The New Sample function key creates one new sample for each test within the Preference.

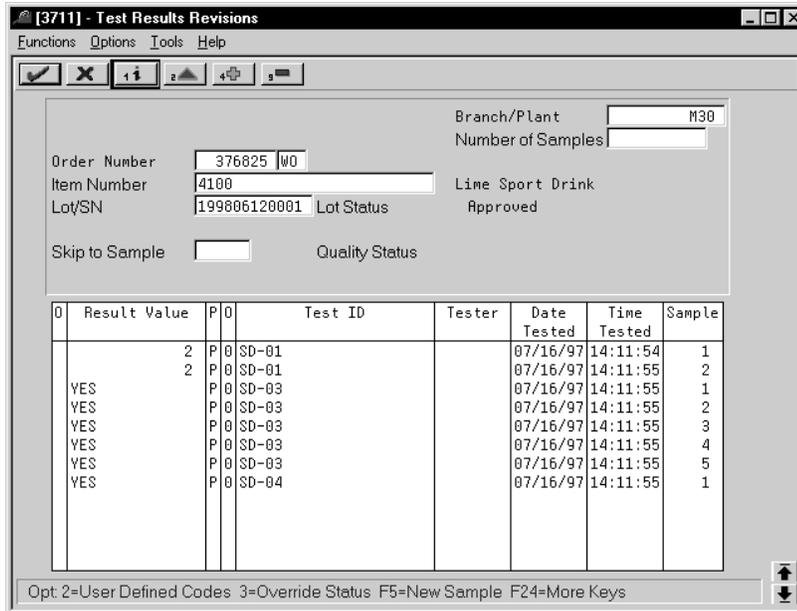
If you set a processing option to display the Number of Samples field, you can create more than one sample. The number you input overrides the number of samples defined for each test in Preference Profiles and Test Revisions.

Before You Begin

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

► To create new samples

On Test Results Revisions

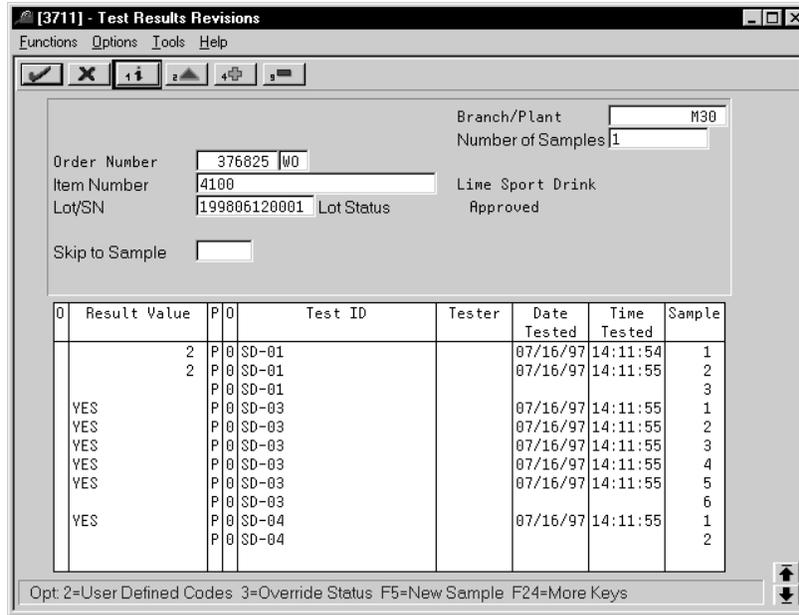


1. After you perform a test on an item's sample and record the results, if you need additional samples for re-testing, enter the number you need in the following field:

- Number of Samples

If you did not set the processing option to display this field, the system displays the number of samples specified for the test.

2. Choose the New Sample function.



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

3. If there are samples you do not need to re-test, select those samples and choose the Delete option.

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

Processing Options for Test Results Revisions

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.

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.

What You Should Know About Processing Options

Preference Profile Processing

To prevent duplicate testing, you can set this processing option to search for test results by lot number first rather than the document number.

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 results that have passed or failed. This program reads the work file, edits the results, and writes records to the Test Results table (F3711).

The Batch Test Results 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.

Processing Options for Batch Test Results Entry

UPDATE INFORMATION:

1. Enter a '1' to update the Test Results file. 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. _____
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. _____

Review Test Results

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

Reviewing test results consists of the following tasks:

- Reviewing test results by lot number
- Locating test results by item number and test ID
- Tracing test results
- Managing failed lots
- Reviewing tested lots by preference profile
- Printing a certificate of analysis
- Printing test results
- Printing the test results worksheet

See Also

- The supplemental documentation for the *Sales Order Management Guide*, for information on searching for tested lots for sales orders.

Reviewing Test Results by Lot Number



From Inventory Management (G41), choose Lot Control

From Lot Control (G4113), choose Lot Availability or Lot Master Revisions

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

► To review test results by lot number

On Lot Availability or 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.

Test ID	Branch/Plant	Status	Result	
SD-01	M30	On-Spec	2	0
SD-01	M30	On-Spec	2	0
SD-03	M30	On-Spec	YES	0
SD-04	M30	On-Spec	YES	0

3. On Test Results Inquiry, determine if a lot has passed quality inspection or if a test was overridden by reviewing the following fields:
 - Status
 - O (Test Override Flag)

Field	Explanation
O	<p>The flag which designates whether a test has been overridden. Valid values are:</p> <ul style="list-style-type: none"> • 1, overridden • 0, not overridden

What You Should Know About

Test Results Inquiry

How Test Results Inquiry displays information depends on how you accessed it:

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

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 to the sales order that meet your customer's requirements.
- Access Test Results Inquiry from Item Search to view test results for an item, lot, and customer so that you can determine whether the lot meets customer specifications.

Locating Test Results by Item Number and Test ID



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 the items in inventory which meet specific test ranges.

► To locate test results by item number and test ID

On Tested Lot Search

Value	Lot/SN	Branch/Plant	Status	Expire	Available Quantity
2	0 199806120001	M30	Approved	07/12/98	10000
2	0 199806120001	M30	Approved	07/12/98	10000

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

- Branch/Plant
- From Result Value
- To Result Value
- Item Number
- Test Identification

If the From Result Value and To Result Value fields are blank, the system displays all test results.

2. Review the following fields:

- Value
- O (Test Override Flag)
- Lot/SN
- S (Specification/Test ID)
- Status
- Expiration
- Available Quantity

Field	Explanation
Status	<p>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.</p> <p>You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.</p>
Expiration	<p>The date on which a lot of items expires.</p> <p>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.</p> <p>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.</p>
Quantity Available	<p>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.</p>

Tracing Test Results



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 re-classified.

See Also

- *Setting Up Inclusion Rules for Tracing Test Results*

► To trace test results

On Trace Test Results

Test ID	Description	Date Tested	Time Tested	Result Value
SD-01	Check bottled drink	07/16/97	14:11:54	2
SD-03	Verify safety seal	07/16/97	14:11:55	YES
SD-04	Verify bottles clea	07/16/97	14:11:55	YES
SD-01	Check bottled drink	07/16/97	14:11:55	2
SC-01	Test electrolyte le	07/16/97	10:52:02	.81
SC-01	Test electrolyte le	07/16/97	10:52:03	.80
SC-01	Test electrolyte le	07/16/97	10:52:03	.81
SC-01	Test electrolyte le	07/16/97	10:52:03	.79
SC-02	Test Color - Test s	07/16/97	10:52:03	MATCH DARK
SC-02	Test Color - Test s	07/16/97	10:52:03	MATCH DARK
SC-02	Test Color - Test s	07/16/97	10:52:03	MATCH DARK
SC-02	Test Color - Test s	07/16/97	10:52:03	MATCH

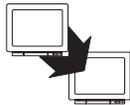
1. To locate a specific item and lot, complete the following fields:

- Branch/Plant
- Mode
- Lot/SN
- Item Number

2. Review the following fields:
 - Test ID
 - Description
 - Date Tested
 - Time Tested
 - Result Value
3. To review lots associated at lower levels, enter 2 in the following field:
 - Mode

Field	Explanation
Mode	A code that indicates how you want the system to display traced test result information. Valid codes are: <ol style="list-style-type: none"> 1 Single level trace 2 Multi-level trace

Managing Failed Lots



From Quality Management (G37), choose Nonconforming Product

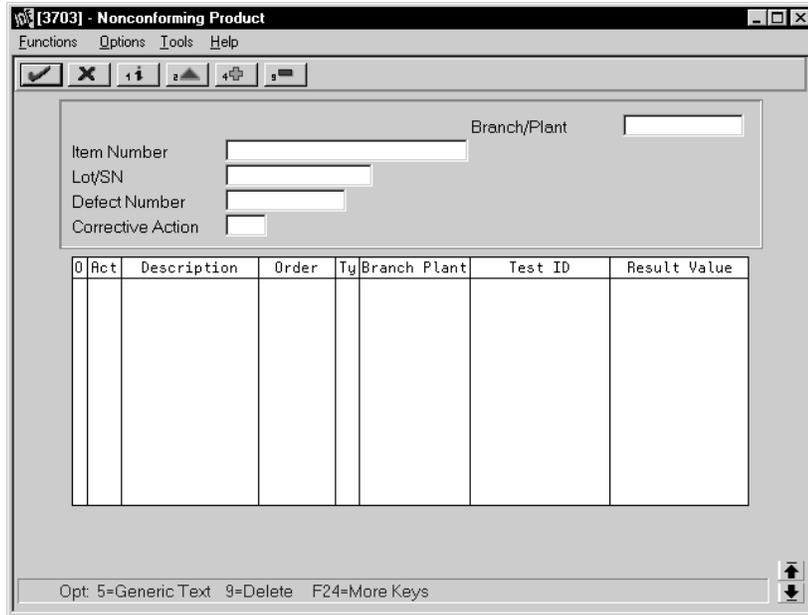
For items that have not passed test evaluation on Test Results Revisions, use the Non-Conforming Product program to review all failed lots and assign a corrective action.

Before You Begin

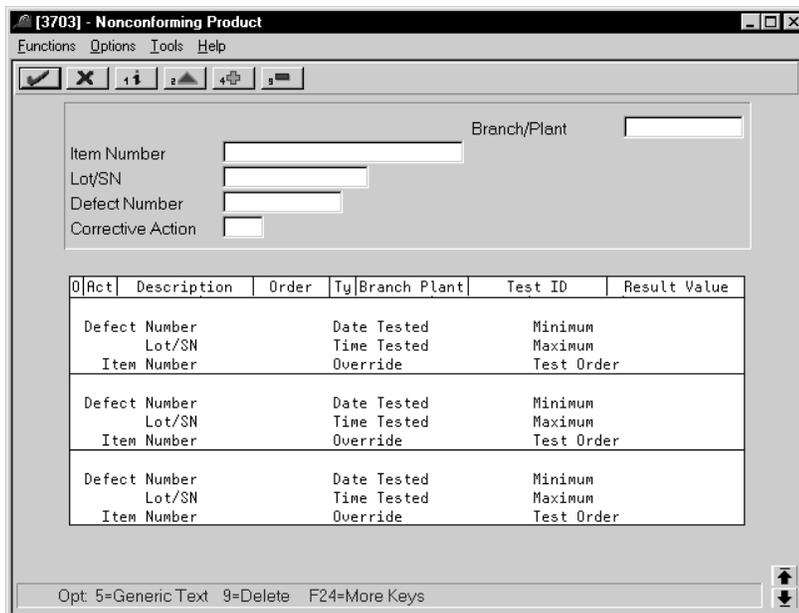
- Set the processing option for Test Results Revisions to write failed tests to the non-conforming product file.

▶ To manage failed lots

On Non-Conforming Product



1. To locate a specific item and lot, complete the following fields:
 - Branch/Plant
 - Item Number
 - Lot/SN
 - Defect Number
 - Corrective Action
2. Access the detail area.



3. Review the following fields:
 - Defect Number
 - Lot S/N
 - Item Number
 - Date Tested
 - Time Tested
 - Minimum
 - Maximum
4. To enter rework orders for a failed lot, complete the following fields:
 - Order
 - Document Type (Ty)
 - Branch/Plant

A highlight indicates generic text for a test result.

Field	Explanation
Defect Number	A next number which will automatically be assigned by Test Results Revisions when a single test fails and the failure is recorded to the Non-Conforming Material file. In order to record failed tests, a processing option must be set from Test Results Revisions (P3711).
Corrective Action	A user defined code (system 37/type RC) that explains the action to be taken following the failed test. For example, a code could be used to indicate the material that failed testing should be reworked and brought to conforming standards.

Reviewing Tested Lots by Preference Profile



From Manufacturing Systems (G3), choose Quality Management

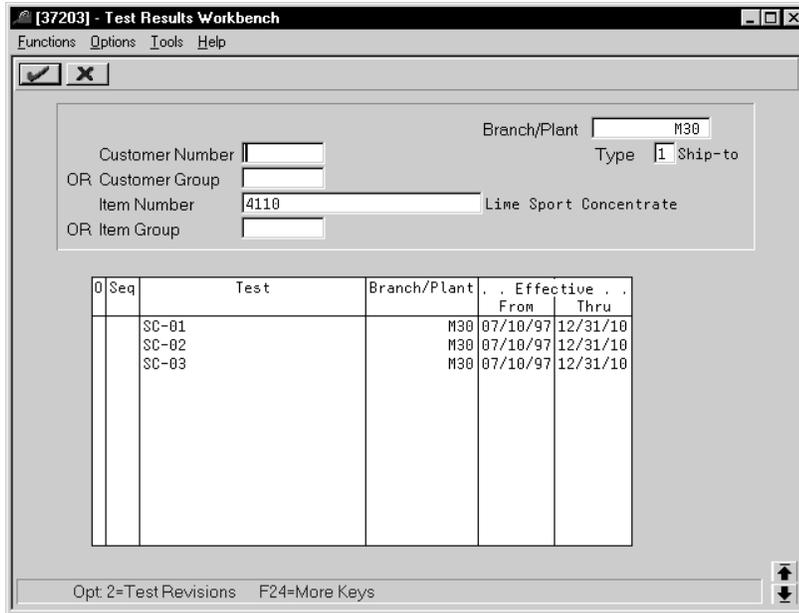
From Quality Management (G37), choose Test Results Workbench

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

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

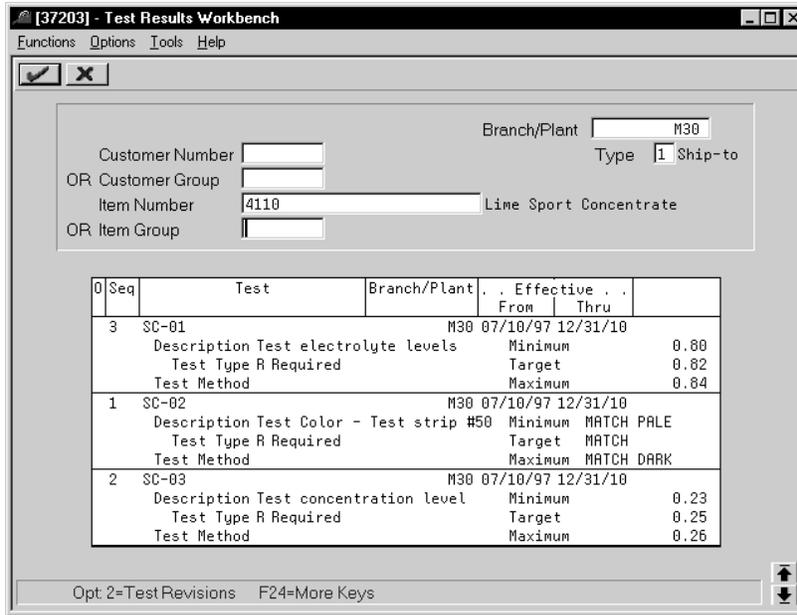
► **To review tested lots by preference profile**

On Test Results Workbench

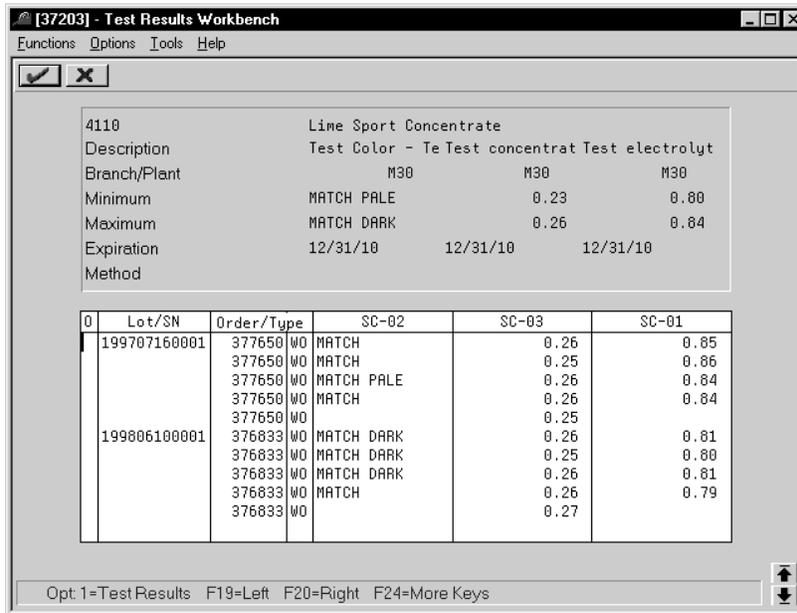


1. Complete the following field:
 - Branch/Plant
2. Complete at least one of the following fields:
 - Customer Number
 - Customer Group
 - Item Number
 - Item Group
3. To view test descriptions, access the detail area.
4. To determine the sequence in which to view test results, enter a sequence number in the following field for each test you want to view:
 - Seq

If you do not enter any sequence numbers, all test results appear. If you enter sequence numbers for some tests, only those test results appear.



5. Press Return to review the selected test results, which appear horizontally in the order in which you sequenced them. If necessary, scroll horizontally across the screen to view all selected tests.



Printing a Certificate of Analysis



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.

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

To generate a COA, you must first use the extract program to obtain the information. Then from the extract program, you select the default or a custom COA to print.

To access processing options:

- For COA Extract, use Form P37900 on Versions List.
- For COA Print, use Form P37460 on Versions List.



You can set processing options within the following programs to print certificates of analysis automatically:

- Ship Confirm
- Load and Delivery Confirm

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 *Defining Tests*.
- Use the COA Print Control on Customer Billing Instructions to determine which customers should receive a Certificate of Analysis. See *Setting Up Customer Billing Instructions*.
- Use Test Result Inclusion Rules to determine the type of transaction records used to trace lots. See *Setting Up Inclusion Rules for Tracing Test Results*.

```

37460
Page . . . . . 1
Date . . . . . 3/06/97
JDEdwards
Certificate of Analysis Company . . . . Edwards, J.D. & Company
8055 E. Tufts Ave.
Denver CO 80237 Invoice Number . . . . . Date Shipped . . 02/27/97 Ship From
Location . .
Customer Order . 97 Quantity . . . . . 5 EA Branch . . . . . ELG Item . . . . . PARENT
Parent - Lot Trace
Lot Number . . . 347514
Manufacture Date 02/27/97
----- T E S T -----
Test Identification Description Minimum Value Target Value Maximum Value Result Tester Date
-----
COLOR Color of beer RED YELLOW BLACK RED + 02/27/97
TASTE Taste of beer 1,119.9- 5,000.0 9,999.9 1,250.0 02/27/97
    
```

Processing Options for Certificate of Analysis Extract

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 Sold To address will be used.

NEXT STATUS:

2. Enter the Override Next Status Code. _____

TRACE PROCESSING:

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

CERTIFICATE OF ANALYSIS:

4. Enter the version of the Certificate of Analysis (P37460) to call. If left blank 'ZJDE0001' will be used. _____

USER DEFINED PROGRAM:

5. Enter the program name of the Certificate of Analysis program. _____
6. Enter the version of the user defined Certificate of Analysis program to call. _____

Test Results Processing

Processing Options for Certificate of Analysis Print

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. _____

Printing Test Results



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 Form P37901 on Versions List.
- For Product Test Report, use Form P37450 on Versions List.

Example: Product Test Report

37450		JDEdwards				Page 1		
		Product Test Report By Order				Date 3/06/97		
Order Number . . .								
Description . . .								
Status Comment								
Lot Number . . .								
Item Number . . .	548480 Micron computer	Related SO No .						
Reference								
----- T E S T -----								
Test Identification	Description	Minimum	Maximum	Target	Result	Tester	Date	Time
BOTTLING	Bottling Inspection	10.2500	20.2500	15.2500	1.0000		02/25/97	100146
BOTTLING	Bottling Inspection	10.2500	20.2500	15.2500	1.0000		02/25/97	100230
COLOR	Color of beer	1000	2000	1500	1200		02/25/97	170814
COLOR	Color of beer	1000	2000	1500	1300		02/25/97	173741
COLOR	Color of beer	10	20	15	16		03/05/97	92206
COLOR	Color of beer	RED	BLACK	YELLOW	RED	5613332	03/05/97	101257
COLOR	Color of beer	RED	BLACK	YELLOW	GREEN	5613332	03/05/97	101257
COLOR	Color of beer	10	20	15	16		03/05/97	101840
COLOR	Color of beer	10	20	15	12		03/05/97	102616
COLOR	Color of beer	10	20	15	13		03/05/97	105232
COLOR	Color of beer	10	20	15	11		03/05/97	111651
COLOR	Color of beer	10	20	15	1000		03/05/97	131147
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,500.0		03/05/97	92206
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,550.0		03/05/97	92206
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,600.0		03/05/97	92206
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,650.0		03/05/97	92206
TASTE	Taste of beer	112.0-	1,000.0	500.0	200.0	5613332	03/05/97	101257
TASTE	Taste of beer	112.0-	1,000.0	500.0	150.0	5613332	03/05/97	101257
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	150.0		03/05/97	101841
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	151.0		03/05/97	101841
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	152.0		03/05/97	101841
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	153.0		03/05/97	101841
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	110.0		03/05/97	102616
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	111.0		03/05/97	102616
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	112.0		03/05/97	102616
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	123.0		03/05/97	102616
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,230.0		03/05/97	105232
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,240.0		03/05/97	105232
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,250.0		03/05/97	105232
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,260.0		03/05/97	105232
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,110.0		03/05/97	111651
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,110.0		03/05/97	111651
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,110.0		03/05/97	111651
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,110.0		03/05/97	111651
TASTE	Taste of beer	1,119.9-	9,999.9	5,000.0	1,110.0		03/05/97	111651
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	19,999.0		03/05/97	131147
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	19,999.0		03/05/97	131147
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	19,999.0		03/05/97	131147
TASTE	Taste of beer	1,119.9-	9,999.9	500.0	19,999.0		03/05/97	131147

Processing Options for Product Test Report Extract

TRACE PROCESSING:

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

PRODUCT TEST REPORT:

2. Enter the version of the Product Test Report (P37450) to call. If left blank 'ZJDE0001' will be used.

USER DEFINED PROGRAM:

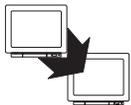
3. Enter the program name of the Product Test Report program.
4. Enter the version of the user defined Product Test Report program to call.

Processing Options for Product Test Report

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.

Printing the Test Results Worksheet



From Shop Floor Management (G31), choose Daily Order Preparation

From Daily Order Preparation (G3111), choose Order Processing

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

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

- an instruction sheet for tests to be run, or
- a form for hand-writing test results to be entered at a later time.

Test Results Worksheet

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J.D. Edwards & Company
Test Results Worksheet

Page No. 2
Date 2/27/98

Order Number 377641 WO
Description Lime Sport Drink
Item Number 4100

Branch/Plant M30 Memphis Mfg. Plant
Lot/SN
Quantity Ordered 5000 BT

Test	Method	Number of Samples	Lime Sport Drink Sample Size	*Effective Dates* From	Thru	Minimum	Target	Maximum	UM	Results
SD-01		2	1 BT	07/10/97	12/31/10	1	2	2		
Description . .	Check bottled drink color	Br/Plt .	M30							
SD-02		1	1	07/10/97	12/31/10	LEVEL	LEVEL	OVER		
Description . .	Check fill level	Br/Plt .	M30							
SD-03		5	1	07/10/97	12/31/10	YES	YES	YES		
Description . .	Verify safety seal	Br/Plt .	M30							
SD-04		1	1	07/10/97	12/31/10	YES	YES	YES		
Description . .	Verify bottles clear of de	Br/Plt .	M30							

See Also

- *Order Processing* in the *Shop Floor Control Management Guide*, to process the Test Results Worksheet

Processing Options for Test Results Worksheet

PRINT CONTROL:

1. Enter '1' to preference for tests based on a related sales order. If left blank, preferencing will be based only on the manufactured item. _____
2. Enter '1' to print the Preferred Minimum and Maximum. If left blank the Allowed Minimum and Maximum will print. _____
3. Enter '1' to page break for each Work Order. _____

GENERIC TEXT OPTIONS:

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

Print Audit Reports

Printing Audit Reports



From Quality Management (G37), enter 27

From Advanced Quality Management (G3731), choose an audit report

You can print audit reports to meet certain regulations. For example, if your quality control is regulated by FDA, EPA, or ISO standards, you can be audited for compliance to certain governmental or international standards for testing. The audit reports show that you made changes at appropriate times to meet these regulations.

The audit reports display the following information:

- For additions and deletions, all fields in the applicable files appear on the report.
- For changes, only changed fields in the applicable files appear on the report.

The following audit reports are provided:

- Test Definitions Audit Report
- Specifications Audit Report
- Specifications Detail Audit Report
- Preference Quality Audit Report
- Test Results Audit Report

Before You Begin

- Set the Log Quality Management Changes constant to Y, to enable the update programs to record additions, deletions and changes to the audit reports. See *Setting Up Manufacturing Constants*.

Appendices

Appendix A — Data Model

The data model for Quality Management is currently unavailable.

Appendix B — Functional Servers

Several J.D. Edwards 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 the following:

- 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.

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

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.

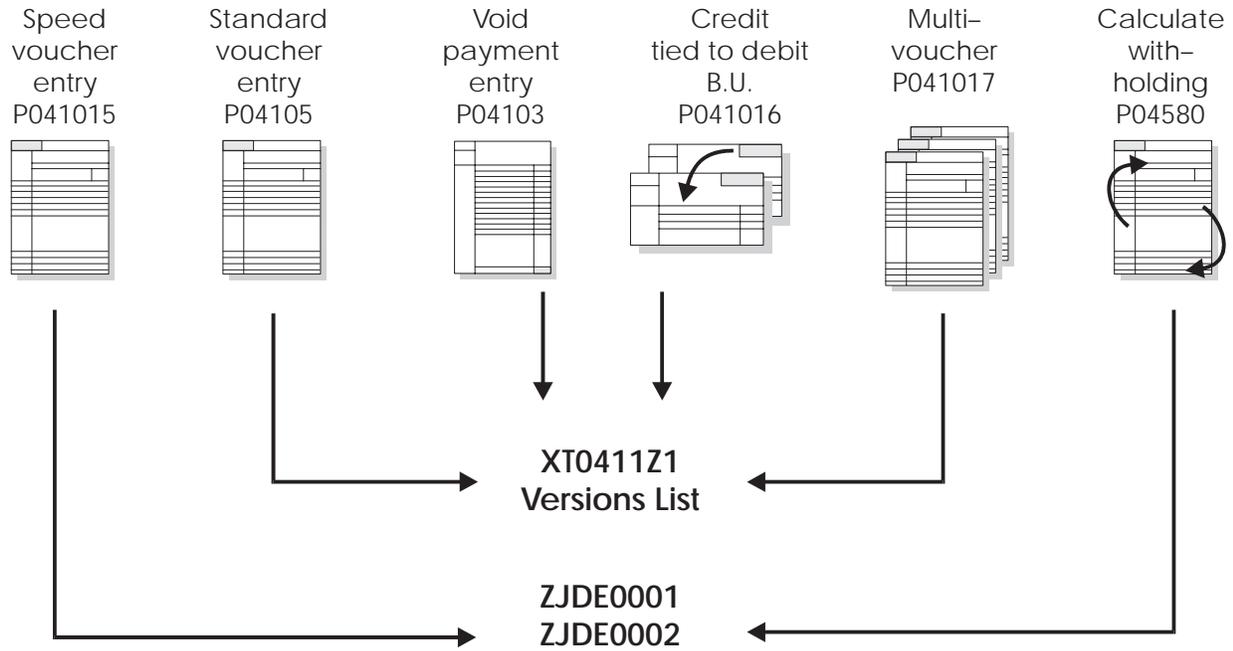
You can have all of your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. J.D. Edwards provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.



Only the person responsible for systemwide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the *Technical Foundation Guide*.

Example: Voucher Processing Functional Server

The following graphic shows the programs that use the voucher processing functional server. J.D. Edwards provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.



Glossary

Glossary

This glossary defines terms in the context of your use of J.D. Edwards systems and the accompanying documentation.

AAI. See *automatic accounting instruction*.

access. To locate the information or functions provided by the system through menus, forms, and reports.

aggregate leadtime. See *cumulative leadtime*.

alphabetic character. Represents data by using letters and other symbols from the keyboard (such as *, &, and #). Contrast with *alphanumeric character* and *numeric character*.

alphanumeric character. Represents data in a combination of letters, numbers, and other symbols (such as *, &, and #). Contrast with *alphabetic character*.

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

alternate routing. A routing, usually less preferred than the primary routing, but resulting in an identical item.

assemble-to-order. A product for which key components (bulk, semi-finished, intermediate, subassembly, fabricated, purchased, packaging, and so on) used in the assembly or finishing process are planned and stocked in anticipation of a customer order. Receipt of an order initiates assembly of the finished product. This is useful when a large number of finished products can be assembled from common components. Contrast with *make-to-order*.

assembly. A group of items or subassemblies that are put together and constitute an end item.

assembly inclusion rule. A logic statement that specifies under which conditions to use a part, adjust the price or cost, perform a calculation, or use a routing operation for configured items.

associated service type. See *linked service type*.

audit trail. The detailed, verifiable history of a processed transaction. The history typically shows all additions, changes, and deletions of records.

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

backflush. The deduction from inventory records of the components or ingredients as a result of the production process. See also *super backflush*.

backscheduling. A technique for calculating operation start dates and due dates. The schedule is computed starting with the due date for the order and working backward to determine the required start date and due dates for each operation.

batch. A group of like records or transactions that the computer treats as a single unit during processing. For identification purposes, the system usually assigns each batch a unique identifier, known as a "batch number."

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

batch header. Information the system uses as identification and control for a group of transactions or records in a batch.

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

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

batch type. A code that designates to which J.D. Edwards system the associated transactions pertain, thus controlling which records are selected for processing. For example, the Post General Journal program selects for posting only unposted transaction batches with a batch type of 0.

bill of material (BOM). A listing of all the subassemblies and raw materials that go into a parent assembly showing the quantity of each required to make the assembly. The BOM is used with the master production schedule to determine the items for which purchase requisitions and production orders must be released. There are a variety of display formats for bills of material, including: single level, multi-level, indented, planning, and costed.

Boolean logic operand. In J.D. Edwards' reporting program, the parameter of the Relationship field. The Boolean logic operand tells the system to perform a comparison between certain records or parameters. Available operands are:

EQ = Equal To

LT = Less Than

LE = Less Than or Equal To

GT = Greater Than

GE = Greater Than or Equal To

NE = Not Equal To

NL = Not Less Than

NG = Not Greater Than

bucketed system. An MRP, DRP, or other time-phased system in which all time-phased data is accumulated into time periods or "buckets." If the period of accumulation is one week, then the system is said to have weekly buckets.

bucketless system. An MRP, DRP, or other time-phased system in which all time-phased data is processed, stored, and usually displayed using dated records rather than defined time periods or "buckets."

bulk issue. Items issued from stores to work-in-process inventory, but not based on a job order, such as miscellaneous fasteners. They are issued in quantities estimated to cover requirements of individual work centers and production lines. The issue may be used to cover a period of time or to fill a fixed-size container.

business unit. See *facility*.

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

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

category code. In user defined codes, a temporary title for an undefined category. For example, if you are adding a code that designates different sales regions, you could

change category code 4 to *Sales Region*, and define E (East), W (West), N (North), and S (South) as the valid codes. Syn: *reporting code*.

certificate of analysis. A document which includes all of the tests performed and resulting test data for an item lot sold to a customer.

character. Any letter, number, or other symbol that a computer can read, write, and store. See also *alphabetic character*, *alphanumeric character*, *numeric character*.

closed-loop MRP. A system built around material planning that includes the additional planning functions of sales and operations (production planning, master production scheduling, and capacity requirements planning). After this planning phase is complete and the plans have been accepted as realistic and attainable, the execution functions come into play. These include the manufacturing control functions of input-output (capacity) measurement, detailed scheduling and dispatching, as well as anticipated delay reports from both the plant and supplier. The term “closed-loop” implies that not only are each of these elements included in the overall system, but also that feedback is provided by the execution functions so that the planning can be kept valid at all times.

committed material. Material on hand or on order that is assigned to specific future production or customer orders. Syn: *reserved material*.

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

component. Raw material, ingredient or subassembly that goes into a higher level assembly, process, or other item. This term may also include packaging materials for finished items.

component availability. The availability of component inventory for the manufacture of a specific parent order or group of orders or schedules.

component changeout. See *component swap*.

component swap. In Equipment/Plant Management, the substitution of an operable component for one that requires maintenance. Typically, you swap components to minimize equipment downtime while servicing one of the components. When you perform a component swap, you can update the parent and component relationship for each component, as well as the status of each component.

composite leadtime. See *cumulative leadtime*.

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

configured item segment. A conceptual characteristic of a configured item defined during sales order entry. For example, when ordering a configured personal computer, the customer may specify what type of hard drive is required by simply stating the number of megabytes of capacity, rather than a part number for the hard drive.

constants. Parameters or codes that rarely change. The system uses constants to standardize information processing by an associated system. Some examples of constants are: validating bills of material online and including fixed labor overhead in costing.

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

corrective maintenance. Any maintenance work that falls outside the scope of preventive or predictive maintenance. Corrective maintenance can be planned, unplanned, or emergency. Examples of corrective maintenance include emergency repairs and maintenance performed to respond to equipment failure. Contrast with *preventive maintenance* and *predictive maintenance*.

corrective work order. In Equipment/Plant Management, a work order that is used to formally request and schedule corrective maintenance and other unscheduled maintenance, such as emergency repairs. Corrective work orders are not generated by the preventive maintenance system. You use corrective work orders to record and communicate all details pertaining to the corrective maintenance task.

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

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

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

crew size. The number of people required to perform an operation. The associated standard time should represent the total time for all crew members to perform the operation.

critical path leadtime. See *cumulative leadtime*.

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

CRP. See *capacity requirements planning*.

cumulative leadtime. The longest planned length of time involved to accomplish the activity in question. For any item planned through MRP, cumulative leadtime is found by reviewing the leadtime for each bill of material path below the item. Whichever path adds up to the greatest number defines cumulative leadtime. Syn: *aggregate leadtime*, *composite leadtime*, and *critical path leadtime*.

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

data dictionary. A database table consisting of the definitions, structures, and guidelines for the use of fields, messages, and help text. The data dictionary table does not contain the actual data itself.

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

demand. A need for a particular product or component. The demand could come from any number of sources, such as customer order, forecast, an interplant requirement, or a request from a branch warehouse for a service item.

dependent demand. Demand that is directly related to or derived from the bill of material structure for other items or end products. Such demands are calculated and should not be forecast. A given inventory item may have both dependent and independent demand at any given time. For example, an item may simultaneously be the component of an assembly and also sold as a service item.

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

direct material. Material that becomes a part of the final product in measurable quantities.

discrete manufacturing. Production of distinct items such as cars, appliances, or computers.

dispatch list. A list of sequenced manufacturing orders or rates. The dispatch list contains detailed information on location, quantity, and capacity requirements. Dispatch lists are usually generated daily and are oriented by work center or line.

DREAM Writer. Data Record Extraction And Management Writer. A flexible data manipulator and cataloging tool. You use this tool to select and sequence the data that is to appear on a programmed report.

effective date. See *effectivity date*.

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

efficiency. A measure (as a percentage) of the actual output to the standard output expected. Efficiency measures how well something is performing relative to expectations; it does not measure output relative to any input. For example, if there is a standard of 100 pieces per hour and 780 units are produced in one eight-hour shift, the efficiency is 780 divided by 800, then multiplied by 100% or 97.5%.

electronic commerce. See *electronic data interchange (EDI)*.

electronic data interchange (EDI). The paperless (electronic) exchange of trading documents, such as purchase orders, shipment authorizations, advanced shipment notices, and invoices, using standardized document formats. Syn: *electronic commerce*.

end item. A product sold as a completed item or repair item. Any item subject to a customer order or sales forecast. Syn: *parent item, finished good, and co-product*.

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

engineer-to-order. Products whose customer specifications require unique engineering design or significant customization. Each customer order results in a unique set of item numbers, bills of material, and routings.

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

expedite. To rush production or purchase orders that are needed in less than the normal leadtime. To take extraordinary action because of an increase in relative priority.

explosion. The process of calculating the demand for the components of a parent item by multiplying the parent item requirements by the quantity per specified in the bill of material. Syn: *requirements explosion*. Contrast with *implosion*.

explosion level. See *low-level code*.

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

facility. Identifies a separate entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Syn: *business unit*.

family. See *master planning family*.

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

FIFO. See *first in, first out*.

finished good. See *end item*.

firm planned order (FPO). A planned order that can be frozen in quantity and time. The system is not allowed to automatically change it; this is the responsibility of the planner in charge of the item that is being planned. This technique can help planners respond to material and capacity problems by firming up selected planned orders. Additionally, firm planned orders are the normal method of stating the master production schedule.

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

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

fixed order quantity. A lot-sizing technique in MRP or inventory management that always causes planned or actual orders to be generated for a predetermined fixed

quantity, or multiples thereof, if net requirements for the period exceed the fixed order quantity.

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

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

forecast. An estimate of future demand. A forecast can be determined by 1) mathematical means using historical data, 2) subjective estimates from informal sources, or 3) a combination of both techniques.

forecast consumption. In Manufacturing and Distribution Planning, forecast consumption occurs when forecast demand is reduced by actual sales orders received or shipped, up to the forecast quantity.

FPO. See *firm planned order*.

frozen cost. After a frozen update, the cost of an item, operation, or process, as used by the Manufacturing Accounting system.

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

Gantt chart. A control chart designed to show graphically the relationship between planned performance and actual performance.

grade. Identifies a rating for an item which is based on how well the item meets required specifications.

header. Information at the beginning of a table. This information is used to identify or provide control information for the group of records that follows.

hidden selections. Menu selections you cannot see until you enter HS in a menu's Selection field. They include items such as Display Submitted Jobs (33), Display User Job Queue (42), and Display User Print Queue (43). The Hidden Selections window displays three categories of selections: user tools, operator tools, and programmer tools.

implosion. The process of determining the where-used relationship for a given component. Implosion can be single level (showing only the parents on the next higher level) or multi-level (showing the ultimate top-level parent). Syn: *where-used*. Contrast with *explosion*.

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

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

indirect costs. Costs that are not directly incurred by a particular job or operation. Certain utility costs, such as plant heating, are often indirect. An indirect cost is typically distributed to the product through the overhead rates.

indirect labor. Work required to support production in general without being related to a specific product, for example, administrative work.

indirect materials. Items that become part of the final product, or substances that are consumed in the manufacture of a product that have a negligible value relative to the value of the final product or the use of which cannot effectively be determined. Examples of indirect materials include masking tape, rags, and oils. These components might or might not be included in the bill of material.

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

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

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

issue. The physical movement of items from a stocking location and, often, the transaction reporting of this activity.

item. Any unique manufactured or purchased part, material, intermediate, subassembly, or product, based on form, fit, or function.

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

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

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

kit. The components of a parent item that have been pulled from stock and readied for movement to a production area.

labor cost. The dollar amount of added value due to labor performed during manufacturing.

last in, first out (LIFO). Method of inventory valuation for accounting purposes, based on the assumption that the most recently received (last in) is the first to be used or sold (first out). There is no relationship with the actual physical movement of specific items.

leadtime. 1) A span of time required to perform a process (or series of operations). 2) In a distribution context, the time between recognition of the need for an order and the receipt of goods. Individual components of leadtime can include order preparation time, queue time, move or transportation time, and receiving and inspection time.

leadtime offset. A technique used in MRP where a planned order receipt in one time period requires the release of that order in an earlier time period based on the leadtime for the item.

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

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

LIFO. See *last in, first out*.

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

load. The amount of planned work scheduled and actual work released for a work center, or operation for a specific span of time. It is usually expressed in terms of standard hours of work or, when items consume similar resources at the same rate, units of production.

load center. See *work center*.

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

lot number control. Assignment of unique numbers to each instance of receipt. This number carries forth into subsequent manufacturing processes. Thus, in review of an end item lot, each lot consumed can be identified as having been used for the manufacture of this specific end item lot.

low-level code. A number that identifies the lowest level in any bill of material at which a particular component appears. Net

requirements for a given component are not calculated until all the gross requirements have been calculated down to that level. Low-level codes are calculated and maintained automatically. Syn: *explosion level*.

machine hours. The amount of time, in hours, that a machine is required to produce a product. Machine hours, rather than labor hours, may be used for planning capacity and scheduling, and for allocating costs.

maintenance loop. See *maintenance route*.

maintenance route. A method of performing PMs for multiple pieces of equipment from a single preventive maintenance work order. A maintenance route includes pieces of equipment that share one or more identical maintenance tasks that can be performed at the same time for each piece of equipment. Maintenance routes eliminate the need to create separate maintenance work orders for each piece of equipment, yet still accommodate all of the features of the preventive maintenance cycle. Syn: *maintenance loop*.

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

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

make-to-stock product. A product that is shipped from finished goods "off-the-shelf," and is finished prior to a customer order arriving. Master scheduling and final assembly scheduling are conducted at the finished goods level.

manufacturing calendar. See *work day calendar*.

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

manufacturing leadtime. The total time required to manufacture an item, exclusive of lower level purchasing leadtime. It includes the time for queue, setup, run, and move.

master planning. A classification scheme that includes the following activities: forecasting and order servicing (which together constitute demand management); production and resource planning; and master scheduling (which includes the final assembly schedule, the master schedule, and the rough cut capacity plan).

master planning family. A group of products used in material planning that have similar characteristics.

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

material requirements planning (MRP). A set of techniques that uses bill of material, inventory data, and the master production

schedule to calculate the time-phased net material requirements for every component item and subassembly. MRP suggests a replenishment plan to support the production of the quantities that are specified in the Master Production Schedule. See also *master production schedule*.

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

MPS. See *master production schedule*.

MRP. See *material requirements planning*.

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

next number facility. A facility used to control the automatic numbering of such items as new purchase orders, sales orders, and work orders. The next number facility provides a method to increment numbers to reduce transposition and typing errors.

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

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

numeric character. Represents data using the numbers 0 through 9. Contrast with *alphabetic character* and *alphanumeric character*.

operand. See *Boolean logic operand*.

operation sequence. The sequential steps for an item to follow in its flow through the plant. For instance, operation 10: cut bar stock; operation 20: grind bar stock; operation 30: shape; operation 40: polish; operation 50: inspect and send to stock. This information is maintained in the routing table.

overhead. Costs incurred in the operation of a business that cannot be directly related to the individual products or services produced. These costs, such as light, heat, supervision, and maintenance, are grouped into department overhead, factory overhead, and general overhead. They are distributed to units of product or service by some standard allocation method.

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

parent/child relationship. See *parent/component relationship*.

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

parent item. See *end item*.

pay on consumption. The concept of not incurring a liability for items received from a supplier until the material is used in the production process.

pegging. In MRP, the ability to identify for a given item the sources of its gross requirements, allocations, or both. Pegging can be thought of as “live where-used” information.

phantom bill of material. A bill of material used primarily for nonstocked items. A phantom bill of material represents an item that is physically built, but rarely stocked. It is instead used in the next step or level of manufacturing. MRP uses the bill to drive the requirements through the phantom item to its components.

picking. The process of withdrawing from stock the components to make the products or the finished goods to be shipped to a customer.

pick list. A document that lists the material to be picked for manufacturing or shipping orders.

planning calendar. See *work day calendar*.

planned order. A suggested order quantity, release date, and due date created by MRP processing when it encounters net requirements. Planned orders at one level are exploded into gross requirements for components at the next lower level. Planned orders, along with released orders, serve as input to capacity requirements planning to show the total capacity requirements by work center in future time periods. See also *firm planned order*.

planning bill of material. An artificial grouping of items or events in bill of material format, used to facilitate master scheduling or material planning, and forecasting. Syn: *pseudo bill of material*.

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

planning horizon. The amount of time the master schedule extends into the future. This is normally set to cover a minimum of

cumulative leadtime, plus time for lot sizing low-level components, and for capacity changes of primary work centers.

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

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

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

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

preflush. An automatic deduction by the system of materials from inventory when the parts list and routing are attached.

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

preventive maintenance cycle. Refers to the sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.

preventive maintenance schedule.

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

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

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

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

process manufacturing. Production that adds value by mixing, separating, forming, or performing chemical reactions. It may be done in either batch or continuous mode.

product data management (PDM). The Product Data Management (PDM) system enables a business to organize and maintain information about each item it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships between components and how they can be combined to manufacture an item. PDM also provides data for other manufacturing

systems including Manufacturing Accounting, Shop Floor Control, and Manufacturing and Distribution Planning.

product family. See master planning family.

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

pseudo bill of material. See *planning bill of material*.

purchased part. An item bought from a supplier.

quality control. The process of measuring quality conformance by comparing the actual with a standard for the characteristic and acting on the difference.

quality management. A system that allows testing of products based on user defined tests and acceptable result values. Test results can be entered in a consistent fashion at any time in the sales, purchasing, production, or shipping process.

quantity per. The quantity of a component to be used in the production of its parent. This value is stored in the bill of material and is used to calculate the gross requirements for components during the explosion process of MRP, and to calculate the quantity on the parts list for a work order.

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

rated capacity. The demonstrated capability of a system. Capacity is calculated from such data as planned hours, efficiency, and utilization. The rated capacity = available hours x efficiency x utilization.

raw material. Purchased items or extracted materials that are converted through the manufacturing process into components or products.

receipt. 1) The physical acceptance of an item into a stocking location. 2) The transaction reporting of this activity.

record. A collection of related, consecutive fields of data the system treats as a single unit of information. For example, a supplier record consists of information such as the supplier's name, address, and telephone number.

release. Authorization to produce or ship material that has already been ordered.

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

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

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

reporting code. See *category code*.

requirements explosion. See *explosion*.

reserved material. See *committed material*.

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

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

rework order. A manufacturing order to rework and salvage defective parts or products.

rollup. See *cost rollup*.

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

routing. Information detailing the method of manufacture or maintenance of a particular item. It includes the operations to be performed, their sequence, the various work centers involved, and the standards for setup and run. In some companies, the routing also includes information on tooling, operator skill levels, inspection operations, testing requirements, and so on.

run size. See *standard batch quantity*.

safety stock. 1) In general, a quantity of stock planned to be in inventory to protect against fluctuations in demand or supply. 2) In the context of master production scheduling, the additional inventory or capacity planned as protection against forecast errors or short-term changes in the backlog. Overplanning can be used to create safety stock.

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

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

scrap factor. A percentage factor in the product structure used to increase gross requirements to account for anticipated loss within the manufacture of a particular product. Syn: *scrap rate*.

scrap rate. See *scrap factor*.

selection. Found on J.D. Edwards menus, selections represent functions that you can access from a given menu. To make a selection, you type its associated number in the Selection field and press Enter.

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

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

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

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

setup. 1) The work required to change a specific machine, resource, work center, or line from making the last good piece of unit A to the first good piece of unit B. 2) Teardown of the just completed production and preparation of the equipment for production of the next scheduled item.

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

shelf life. The amount of time an item may be held in inventory before it becomes unusable.

shop calendar. See *work day calendar*.

shop floor calendar. See *work day calendar*.

shop floor control. A system that uses data from Product Data Management, Master Production Schedule, and Material Requirements Planning to create, maintain,

and communicate status on shop orders (work orders.). The major subfunctions of shop floor control are: 1) assigning priority of each shop order, 2) maintaining work-in-process quantity information, 3) conveying shop order status information to the office, 4) providing actual output data for capacity control purposes, 5) providing quantity by location by shop order for work-in-process inventory and accounting purposes, and 6) providing measurement of efficiency, utilization, and productivity of machines and labor resources.

shrinkage. Reductions of actual quantities of items in stock, in process, or in transit. The loss might be caused by scrap, theft, deterioration, evaporation, and so forth.

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

shrinkage rate. See *shrink factor*.

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

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

simulation. 1) The technique of using representative or artificial data to reproduce a model of various conditions that are likely to occur in the actual performance of a

system. It is frequently used to test the behavior of a system under different operating policies. 2) Within MRP, using the operational data to perform “what if” evaluations of alternative plans to determine the feasibility of the model.

single level bill of material. A display of those components that are directly used in a parent item. It shows only the relationships one level down.

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

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

standard batch quantity. The quantity of a parent that is used as the basis for specifying the material requirements for production. The “quantity per” is expressed as the quantity needed to make the standard batch quantity, not to make only one of the parent. It is often used by manufacturers that use some components in very small quantities or by process-related manufacturers. Syn: *run size*.

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

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

standard hours. The length of time that should be required to 1) set up a given machine or operation and 2) run one part, assembly, batch, or end product through that operation. This time is used in determining machine and labor

requirements. It is also frequently used as a basis for incentive pay systems and as a basis for allocating overhead in cost accounting systems.

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

substitution. Using alternate components in production when the primary item is not available.

super backflush. Creates backflush transactions against a work order at pay points defined in the routing. This allows you to relieve inventory at strategic points throughout the manufacturing process. See also *backflush*.

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

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

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

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

throughput. The total volume of production through a facility (machine, work center, department, plant, or network of plants).

time series. A set of data that is distributed over time, such as demand data, in monthly time periods.

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

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

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

variable overhead. All manufacturing costs that vary directly with production volume, other than direct labor and direct materials. Variable overhead is necessary to produce the product, but cannot be directly assigned to a specific product.

variable quantity. In manufacturing, a variable quantity of a component or ingredient indicates that the amount required varies based on the quantity of the end product produced. Contrast with *fixed quantity*.

variance. 1) In Product Costing and Manufacturing Accounting, the difference between two methods of costing the same item. For example, the difference between the frozen standard cost and the current cost is an engineering variance. Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates. 2) In Equipment/Plant Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

where-used. A listing of every parent item that calls for a given component, and the respective quantity required, from a bill of material file. Syn: *implosion*.

work center. A specific production facility with identical capabilities, consisting of one or more people, machines, or both. A work center can be considered as one unit for purposes of capacity requirements planning and detailed scheduling. Syn: *load center*.

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

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

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

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