JD Edwards EnterpriseOne Applications

Quality Management Implementation Guide

9.2

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

Documentation Accessibility

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Access to Oracle Support

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

Related Information

For additional information about JD Edwards EnterpriseOne applications, features, content, and training, visit the JD Edwards EnterpriseOne pages on the JD Edwards Resource Library located at:

http://learnjde.com

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
Italics	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`Monospace`	Monospace type indicates commands within a paragraph, URLs, code examples, text that appears on a screen, or text that you enter.
> Oracle by Example	Indicates a link to an Oracle by Example (OBE). OBEs provide hands-on, step- by-step instructions, including screen captures that guide you through a process using your own environment. Access to OBEs requires a valid Oracle account.

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1 Introduction to JD Edwards EnterpriseOne Quality Management

JD Edwards EnterpriseOne Quality Management Overview

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

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

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

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

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

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

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

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

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

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JD Edwards EnterpriseOne Quality Management Integrations

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

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

The JD Edwards EnterpriseOne Quality Management system works with other JD Edwards EnterpriseOne systems. We discuss integration consideration in the implementation chapters in this implementation guide. Supplemental information about third-party application integrations is located on the My Oracle web site at *https://support.oracle.com/* .

JD Edwards EnterpriseOne Inventory Management

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

JD Edwards EnterpriseOne Procurement

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

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

JD Edwards EnterpriseOne Shop Floor Management

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

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

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JD Edwards EnterpriseOne Sales Order Management

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

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

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

JD Edwards EnterpriseOne Blend Management

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

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

If you use the JD Edwards EnterpriseOne Blend Management system, generally you access the JD Edwards EnterpriseOne Quality Management programs using the Blend Management - Blend Quality Management menus (G31B04). You can access the Test Result Name program (P37013) from the Quality Management Setup menu (G31B41); however, the data is for informational purposes only.

JD Edwards EnterpriseOne Quality Management Implementation

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

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information.

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

See   *JD Edwards EnterpriseOne Tools Software Updates Guide*   .

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Global Implementation Steps

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

- Set up global UDC tables.

  See *"Working with User Defined Codes" in the   JD Edwards EnterpriseOne Tools Runtime Administration Guide* .

- Set up fiscal date patterns.

  See *"Setting Up Organizations", "Setting Up Fiscal Date Patterns" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

- Set up companies.

  See *"Setting Up Organizations", "Setting Up Companies" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

- Set up business units.

  See *"Setting Up Organizations", "Setting Up Business Units" JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

- Set up next numbers.

  See *"Setting Up Next Numbers" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

- (Optional) Set up accounts, and the chart of accounts.

  See *"Creating the Chart of Accounts", "Setting Up Accounts" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

- Set up the General Accounting Constants.

  See *"Setting Up the General Accounting System", "Setting Up Constants for General Accounting" in the   JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* .

- Set up multicurrency processing, including currency codes and exchange rates.

  See *"Preface" in the   JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide* .

- (Optional) Set up ledger type rules.

  See *"Setting Up the General Accounting System", "Setting Up Ledger Type Rules for General Accounting" in the   JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* .

- Set up address book records.

  See *"Entering Address Book Records" in the   JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

- Set up default location and printers

  See *"Working with Report Printing Administration" in the JD Edwards EnterpriseOne Tools Report Printing Administration Technologies Guide* .

- Set up branch/plant constants.

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See *"Setting Up the Inventory Management System", "Setting Up Constants", "Defining Branch", "Plant Constants" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

- Set up Manufacturing/Distribution automatic accounting instructions (AAIs).

  See *"Setting Up the Inventory Management System", "Setting Up AAIs in Distribution Systems" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

- Set up document types.

  See *"Setting Up the Inventory Management System", "Setting Up Document Type Information" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

- Set up shop floor calendars.

  See *"Setting Up Shop Floor Management", "Setting Up Shop Floor Calendars" in the JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* .

- Set up manufacturing constants.

  See *"Setting Up Product Data Management", "Setting Up Manufacturing Constants" in the JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* .

JD Edwards EnterpriseOne Quality Management Implementation Steps

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

- Activate Quality Management.

  See *Activating EnterpriseOne Quality Management*.

- Define tests.

  See *Defining Tests*.

- Enter user-defined codes.

  See *Entering UDCs*.

- Define specifications.

  See *Defining Specifications*.

- Set up preference profiles.

  See *Setting Up Preference Profiles*.

- Set up inclusion rules for test results tracing.

  See *Setting Up Inclusion Rules for Test Results Tracing*.

- Set up customer billing instructions for Quality Management.

  See *Setting Up Customer Billing Instructions for EnterpriseOne Quality Management*.

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Business Interface Integration Objects

A business interface is a set of components that implementation teams can use to create an integration between JD Edwards EnterpriseOne and an external system. Business interfaces can include one or more of these business interface components:

- Business Services

- Real-Time Events

- Batch Import and Export Programs

For additional information about business interfaces, and the business objects available for this product area, see these topics in the *JD Edwards EnterpriseOne Applications Business Interface Reference Guide*

- *Business Interfaces Overview*

- *Test Result*

2 Understanding the Quality Management System

JD Edwards EnterpriseOne Quality Management Features

This section discusses:

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

Tests

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

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

Specifications

Specifications enable you to group tests that belong together or should be performed together. Examples include mechanical, visual, and electronic specifications.

Preference Profiles

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

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

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Test Results Entry

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

You can enter test results during these steps in the manufacturing and distribution process:

- When entering receipts for items on purchase orders.
- When routing receipts for purchase orders and work orders.
- When moving items to stock after production is complete.
- When entering hours and quantities.
- When confirming shipments or packages.
- When confirming ECS bulk or package loads.
- When entering sales orders.
- When reviewing lots.

Information Review

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

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

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

Generic Text Entry

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

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

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

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JD Edwards EnterpriseOne Quality Management Tables

The JD Edwards EnterpriseOne Quality Management system uses these tables:

Table Name	Description
F3701 table	Contains test definitions, which consist of the Test ID, description, type of test, minimum and maximum values, target values, and effectivity dates. This table also contains information that indicates whether to print the test on the certificate of analysis and whether to print generic text.
F3702 table	Contains the description of the specification and effectivity dates.
F37021 table	Contains information about the different tests that are grouped within the specification.
F3703 table	Contains records of failed tests.
F3711 table	Contains the test results for an item and lot number in inventory or on a work order, purchase order, or sales order.
F3711Z1 table	Contains test results uploaded from a Laboratory Information Management (LIM) system.
F37900 table	Contains test results that print on the certificate of analysis or Product Test report (R37901).
F40318 table	Identifies which tests or specifications are required for an item, item group, customer, or customer group.
F40318R table	Contains historical information about the number of times that a preference has been used on sales orders.

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3 Setting Up EnterpriseOne Quality Management

Understanding EnterpriseOne Quality Management Setup

This section lists prerequisites and discusses system setup.

Prerequisites

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

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

  See *"Using Lot Processing, Entering Lot Information" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide *.

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

System Setup

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

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

- Branch/Plant constants

- Tests

- (Optional) Specifications

- Preference profiles

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

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

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Activating EnterpriseOne Quality Management

This section discusses how to:

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

Forms Used to Activate EnterpriseOne Quality Management

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

Activating EnterpriseOne Quality Management at the System Level

Access the JD Edwards EnterpriseOne System Control Revision form.

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

Specifying Each Branch or Plant to Include in Quality Control Testing

Access the Branch/Plant Constants form.

You can also set the Test Results Control (Y/N) option in the Branch/Plant Constants program (P41001) to enable the copy test results functionality in the JD Edwards EnterpriseOne system.

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

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

Test Results Control (Y/N) (test results control (yes or no))
Select to activate the Copy Test Results feature in the Quality Management system for the branch/plant.

If you select this option, the system enables the Copy Test Results feature in the Quality Management system for this branch/plant.

If you clear this option, the system disables the Copy Test Results feature in the Quality Management system for this branch/plant.

> **Note:** Quality Control must be enabled in order to activate Test Results Control.

Defining Tests

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

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

Understanding Testing

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

You provide this information for each test:

- Test description.
- Test effective and expiration dates.
- Method for recording results.

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- Number of test samples.

- Method for evaluating results.

- Information to print on the certificate of analysis.

- Methods and reference numbers of the American Society of Testing Material (ASTM).

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

This table shows each type of test:

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

You can use generic text to add information or instructions related to a specific test, such as sampling methods to be used. The system automatically copies generic text from tests to preferences. When you enter test results, you can select a processing option to copy information or instructions from tests or preferences to test results.

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

- Customer

- Customer group

- Item (product)

- Item group

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

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

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

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can then attach these consumables to a test definition. The system stores the information for these items in the Test Consumables (F37012) table.

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

> **Note:**
>
> When you set up test result names, it is recommended that you do not use a user-defined character in the Test Result Name field. For example, do not use any user-defined characters that you set on the Pricing Constants form or special characters, such as &, %, !, ?, @, $, | or #. When you use test result names in conjunction with formulas in the JD Edwards EnterpriseOne Advanced Pricing system, the system does not interpret this symbol in both the formula and the test result name. For example, you want to reduce the purchase price of grapes by 10 percent for every Brix test result below 23. A Brix test result of 22 reduces the price by 10 percent, a Brix test result of 21 reduces the price by 20 percent, and so forth. For example, the formula in Advanced Pricing might be:
> ((23-@BRIX)*-.1)*#UPRC
>
> In this example, the @ symbol is part of the formula to determine the price of the grapes based on the Brix test result. If you use a symbol in the formula and add a test result name with a symbol, the system does not distinguish between the two symbols.

See *"Setting Up Quality Management" in the JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* .

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

Forms Used to Define Tests

Form Name	FormID	Navigation	Usage
Add Test Definition	W3701A	Quality Management Setup (G3741), Test Revisions Click Add on the Work With Test Definitions form.	Define tests.
Edit Test Definition	W3701A	Quality Management Setup (G3741), Test Revisions Find and select a test, and then click Select on the Work With Test Definitions form.	Define tests.
Test Result Name Revisions	W37013B	Quality Management Setup (G31B41), Test Result Names Click Add on the Work with Test Result Name form.	Set up the test result names for the quality tests that you perform.

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Form Name	FormID	Navigation	Usage

Setting Processing Options for Test Revisions (P3701)

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

Defaults

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

Status

Specify which test definitions the system displays. Values are:

Blank: Display only active test definitions.

1: Display only test definitions which are pending approval.

2: Display only historical test definition information.

3: Display only rejected change requests.

Process

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

Log History

Specify whether the system records the existing test definition before applying modifications. When recording the test definition, the system saves an image as history information. The saved information can be viewed online or in a report by selecting the History option on the Defaults tab in the processing options for Test Revisions (P3701). Values are:

Blank: Do not record.

1: Record.

Workflow

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

Workflow

Specify whether to activate workflow approval processing when modifications are made to test definitions. When you activate workflow, the revised test definition must be approved before the test definition is available for use. Values are:

Blank: Not activated; revised test definition is available for immediate use.

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

Defining Tests

Access the Add Test Definition or Edit Test Definition form.

Test ID

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Enter the unique identification of the test to be performed on an item. For example:

COL: Color test

DENS: Density test

CL-2: Clarity test

Effective From

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

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

Thru (effective through)

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

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

Definition Tab, Definition

Select the Definition tab.

Test Type

Specify how the system processes tests as you enter test results. Values are:

- **Required:** Select if you want result values to be within the allowable range for the test to pass. The system does not allow an item to pass quality inspection until you enter results for each required test.
- **Optional:** Select if you want result values to be optional during results entry. The system does not require the entry of a result for each optional test. However, if you enter failing results, the item fails quality inspection.
- **Guaranteed:** Select if you want result values to be optional during results entry. You can control whether Guaranteed tests appear as you enter test results with the Display Test field on the Test Revisions form. In addition, guaranteed tests print on the Certificate of Analysis.

Mandatory Test

Select to specify that test results entry is mandatory for this Test ID when test results are entered through the Test Result Revisions program (P3711).

Display/Evaluate Test

Enter a code that determines how test results appear in Test Results Inquiry when accessed from sales orders. This code also determines how a test is to be evaluated. Values are:

No Display in Test Results: Do not display tests when using Test Results Revisions or result inquiry programs. This value is only allowed for tests of type G, Guaranteed.

All Samples: 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.

Average of Samples: 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.

Last Sample: Display the last occurrence of a test when using result inquiry programs. The last occurrence is the test result last entered in Test Results Revisions. The system uses only the last test result to determine if a lot passes or fails.

Print Test

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

No Print on COA: The test will not be printed on the Certificate of Analysis.

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

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

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

Print Text

Determines whether the generic text for an item that is input through Test Result Revisions (P37111) will be printed on the Certificate of Analysis. Values are:

1: Print.

0: Do not print.

Definition Tab, Sample Information

Define information about the sample.

Number of Samples

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

Sample Percentage

Enter the percentage of an order quantity, which determines the number of samples to create in Test Results Revisions. For example, if the sample percentage is 50 percent and the order quantity is 10, then 5 samples will be created in Test Results Revisions. Use either this field or Number of Samples to control how many samples to create. You can use this field only with the order mode of Test Results Revisions.

If the sample percentage is 100 percent, then testing is required for every unit on the order. You cannot use Accept Percentage or Accept Quantity, as all units on the order must pass for the lot to pass.

Sample Size

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

Sample Size UOM (sample size unit of measure)

Enter an identifying value for the unit of measure for a sample you take to test. Examples of units of measure include barrels, gallons, hours, and cubic yards.

Accept Quantity

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

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Blank: Accept percentage

1: Display/evaluate

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

Blank: Accept quantity

1: Display/evaluate

Definition Tab, Blend Management

Define information about the sample for JD Edwards EnterpriseOne Blend Management.

Lab
Enter a number that identifies an entry in the JD Edwards EnterpriseOne Address Book system for a lab.

Sample Method
Enter a value from UDC 37/SM that describes the method to use for sample collection. For example, a sample from the top of the tank.

Consolidation
Enter a value from UDC 37/CN that indicates if samples can be consolidated and if consolidation is cumulative or reuse.

Sample Container
Enter a value from UDC 37/CR to indicate the container to use for the sample.

Closure
Enter a value from UDC 37/CL to indicate closure for the sample container.

Test Results Name
Enter a unique name used to group test results.

Copy Test Results Ranges
Select to automatically copy the test result ranges when changing the test result name field. If unchecked, changing the test result name will not overwrite existing test result ranges.

Result Ranges Tab, Alpha/Numeric

Select Results Ranges.

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

Numeric
Select to indicate that the result value is numeric and should be right justified.

Clear to indicate that the result value is alphanumeric and should be left justified. Tests that are using alphanumeric result values can have UDC tables set up that contain alpha to numeric translations. The purpose of these tables is to supply result evaluations with a way of determining whether a result is within the range of the minimum and maximum values.

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

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

Product Code
Enter a UDC (98/SY) that identifies a system. Values are:

01: Address Book

03B: Accounts receivable

04: Accounts payable

09: General accounting

11: Multicurrency

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

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

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

Result Ranges Tab, Result Ranges

Select the Result Ranges tab.

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

Preferred Minimum
Enter the lowest value for the preferred test result. This value must be greater than or equal to the allowed minimum value. Use the preferred minimum value to measure quality to a more precise specification than a customer requests.

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

Target
Enter the preferable or target test result within the test results range. As the system does not test against a target value, this field is for the information only.

Preferred Maximum
Enter the highest value for the preferred test result. This value must be less than or equal to the allowed maximum value. Use the preferred maximum value to measure quality to a more precise specification than a customer requests.

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

Allowed Maximum
Enter the highest value for a passing test result.

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

Result Ranges Tab, Blend Management

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

Threshold Percent

Enter the allowed percentage of variation from the previous result.

Result Duration

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

Result Conversion ID

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

Descriptions Tab, Descriptions

Select the Descriptions tab. Complete the category codes.

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

ASTM Reference (American Society of Testing Material reference)

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

Test Method

Enter a description of how to run a quality test. The test method is useful to both the company Quality Control department and the customers. For example:

Test: Viscosity

Method: RVF #4 @10RPM

Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.

Property

Enter the item attribute that is being tested.

Test Duration

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

Setting Up Test Result Names

Access the Test Result Name Revisions form.

Test Result Name

Enter the name for the test result.

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

Description

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

Numeric

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

Tests that are using alphanumeric result values can have UDC tables set up that contain alpha to numeric translations. The purpose of these tables is to supply result evaluations with a way of determining whether a result is within the range of the minimum and maximum values.

Display Decimals

Enter a value to designate the number of decimals in the amount or quantity fields that appear.

Allowed Minimum

Enter the lowest value for a passing test result.

Preferred Minimum

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

Processing options for the Certificate of Analysis (R37900) program enable you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions (P3701) program enable you to evaluate samples against the preferred values.

Target

Enter the target or preferable test result within the test results range. The system does not validate against a target value; this field is for information purposes only.

Preferred Maximum

Enter the highest value for the preferred test result. This value must be less than or equal to the value that you enter in the Allowed Maximum field. Use the preferred maximum value to measure quality to a more precise specification than a customer requests.

Processing options for the Certificate of Analysis (R37900) program enable you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions (P3701) program enable you to evaluate samples against the preferred values.

Allowed Maximum

Enter the highest value for a passing test result.

Result UOM (result unit of measure)

Enter a UDC (37/UM) to identify the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.

Blend Rule

Enter a UDC (31B/QB) to indicate the blending rule for results.

Entering UDCs

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

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

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

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

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

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

Defining Specifications

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

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

Understanding Specifications

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

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

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

For each specification, you can define:

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

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

Note: If you use workflow approval processing, you cannot make changes to records that have a status of pending. Also, any changes that you make do not become effective until they are approved.

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Prerequisites

Before you can define specifications:

- Set the processing option for the Specification Revisions program (P3702) to activate workflow and use the approval process.

- Set the processing option for the Specification Revisions program to log changes to specification definitions to create historical information.

Form Used to Define Specifications

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

Setting Processing Options for Specification Revisions (P3702)

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

Defaults

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

1. Status

Specify a status to filter specifications. Values are:

1: Display only specifications which are pending approval.

2: Display only historical specification information.

3: Display only rejected change requests.

Blank: Display only active specifications will display.

Process

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

1. Log History

Specify whether the system logs additions to, modifications of, and deletions of test definitions. When you activate workflow, any addition to, change to, or deletion of a test definition must be approved before the revision is available for

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use. The system logs these before images as history information, and they can be viewed online or through reports by selecting the history status (status value is 2). Values are:

Blank: Do not perform.

1: Perform.

Workflow

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

Workflow

Specify whether to activate workflow approval processing. When you activate workflow, any addition to, change to, or deletion of a test definition must be approved before the revision is available for use. Values are:

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

1: Activated.

Revisions must be approved before they are available for use.

Defining Specifications

Access the Specification Revisions form.

Branch/Plant

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

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

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

Seq (sequence)

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

Test Identification

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

Setting Up Preference Profiles

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

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

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Understanding Preference Profiles

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

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

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

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

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

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

After you define tests and specifications, you can customize them by setting up preference profiles, referred to as preferences.

Depending on how you set up the hierarchy for preference profiles, you can set up preferences for:

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

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

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

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

Preference Master Record Set Up

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

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

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Specification Splits

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

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

Prerequisites

Before you can set up preference profiles:

- Set up the customer information in the Address Book if you define tests and enter test results by customer.

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

  See *"Entering Item Information", "Entering Item Master Information" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

  See *"Entering Item Information", "Entering Branch", "Plant Information" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

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

- Set up the hierarchy for preference profiles.

  See *"Working with Schedules and Adjustments", "Setting Up Advanced Pricing Hierarchies", "Setting Up a Preference Master" in the JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide* .

- Set the processing option for the Quality Preference Revisions program (P40318) to activate workflow and use the approval process.

- Set the processing option for the Quality Preference Revisions program to log changes to preference profiles to create historical information.

Forms Used to Set Up Preference Profiles

Form Name	FormID	Navigation	Usage
Preference Hierarchy Revisions	W40073D	Quality Management Setup (G3741), Preference Master Locate preference type **18** on the Work With Preference Master form, and select Hierarchy from the row menu.	Set up a quality preference master record.

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Form Name	FormID	Navigation	Usage
		Enter consecutive numbers at the intersections of rows and columns on Preference Hierarchy Revisions, and then click the OK button.	
Preference Hierarchy Revisions	W40073D	Select a preference on the Work with Preference Master form, and select Hierarchy from the Row menu.	Define the hierarchy of the preference.
Preference Hierarchy Selection	W40073F	Quality Management Setup (G3741), Quality Preference Revisions Click the Add button on the Work With Quality Management Profile form.	Select a preference hierarchy.
Quality Management Profile Revisions	W40318B	Select a hierarchy on the Preference Hierarchy Selection form, and click the Select button. Select a record, and select Split Spec from the Row menu on the Quality Management Profile Revisions form. Review the separate tests for this specification.	Define preference profiles. You can override test definition values if necessary. **Note:** If you use workflow approval processing, you cannot make changes to records that have a status of pending. Also, any changes that you make do not become effective until they are approved.
Display Criteria Window	W40318D	Select a row on the Quality Management Profile Revisions form, and select Display Criteria from the Row menu.	Customize display criteria. Selections that you make here control what appears on the Test Results Revisions form. If you don't want to perform quality testing for a particular program, verify that the corresponding option is clear. For example, to enter test results during work order inventory completions, verify that the Manufacturing Completions option is selected. This option activates the Test Results Revisions program (P3711) when

Form Name	FormID	Navigation	Usage
			you enter a work order completion.
Quality Management Profile Revisions	W40318B	Quality Management Setup (G3741), Quality Preference Revisions Select a specification on the Work With Quality Management Profile form, and click the Select button.	Define the tests and specifications that make up the preference.

Setting Processing Options for Preference Profile Quality Management (P40318)

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

Default

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

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

Blank: Only active preferences will display.

1: Only preferences which are pending approval will display.

2: Only historical preference information will display.

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

Process

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

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

Blank: Do not activate.

1: Activate.

Workflow

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

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

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

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

Setting Up a Quality Preference Master Record

Access the Preference Hierarchy Revisions form.

Defining Preference Profiles

Access the Quality Management Profile Revisions form.

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

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

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

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

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

T (test): You can override testing and sampling information from the original test definition by competing the appropriate fields. If you override this information, the preference displays the override values. Otherwise, the preference displays the default values.

S: (specification)

Test Specification
Enter the unique identification for a test to be performed on an item. For example:

COL: color test

DENS: density test

CL-2: clarity test

Test Type
Enter a value that specifies how the system processes tests as you enter test results. Values are:

R (required): Result values must be within the allowable range for the test to pass. The system does not allow an item to pass quality inspection until you enter results for each required test.

O (optional): Result values are optional during results entry. The system does not require the entry of a result for each optional test. However, if you enter failing results, the item fails quality inspection.

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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.

Result UM (result unit of measure)

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

Display Dec (display decimals)

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

Customizing Display Criteria

Access the Display Criteria Window form.

Manufacturing Operations

Select to specify whether the system displays the test on the Test Results Revisions form when you access the Test Results Revisions program (P3711) from any of these Manufacturing programs:

Coproduct and Byproduct Completion (P31115)

Super Backflush (P31123)

Work Order Time Entry (P311221)

If you enter **1** in the grid column or if this option is checked, the system displays the test on the Test Results Revisions form. You can use this value with the operation sequence and routing type to control the appearance of the test at an operation or routing type.

Manufacturing Receipt Routing

Select to specify 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.

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

Manufacturing Completions

Select to specify whether the system displays the test on the Test Results Revisions form when you access the Test Results Revisions program (P3711) from either of these Manufacturing programs:

Work Order Completions (P31114)

Completions Workbench (P3119)

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

Purchasing Receipts

Select to specify 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).

Purchasing Receipt Routing

Select to specify 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.

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

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Ship Confirm

Select to specify whether the test will display on the Test Results Revisions form when you access test results from the Ship Confirmation (P4205) program.

Bulk Load Confirm

Select to specify whether the test will display on the Test Results Revisions form when you access test results from one of these programs:

Bulk Confirm by Order or Bulk Confirm by Trip (P49510)

Packaged Load Confirmation (P49530)

Sequence

Enter a number to indicate the step in the manufacturing operation or receipt routing that the system displays the test on the Test Results Revisions form.

Type

Enter a UDC (40/TR) that indicates the type of routing. You can define different types of routing instructions for different uses. For example:

M: Standard manufacturing routing

RWK: Rework routing

RSH: Rush routing.

You define the routing type on the work order header. The system uses the specific type of routing that you define in the work order routing.

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

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

Splitting Specifications

Access the Quality Management Profile Revisions form.

Working with Approval Processing

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

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

Understanding Approval Processing

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

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

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

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

When you activate workflow, changes to any fields trigger the workflow approval process. All revision transactions begin with a status of pending. A designated approver reviews the changes and approves or rejects them. For example, you might need to reject changes to the allowed minimum and maximum values for a passing test result, due to customer requirements.

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

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

Note: Revision levels on specifications are for information only.

Test, Specification, and Preference Revisions

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

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

   You can change only active records when no pending approvals are in progress.

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

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

Approval or Rejection of Revisions

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

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

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

Prerequisites

Before you can work with approval processing:

- Set up workflow processing.

    See *JD Edwards EnterpriseOne Tools Workflow Tools Guide* .

- Review the processing options for these programs to ensure that workflow processing is activated:

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

- Set up distribution lists for approvers who change tests, specifications, and preferences in Workflow Management.

- Ask the system administrator to assign permissions to the Approver field in the Approvals Workbench program (P37300).

Forms Used to Approve Changes

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

Revising Tests, Specifications, and Preferences

Access the Edit Test Definition form.

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Approving Revisions

Access the Quality Management Approvals Workbench form.

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

- Select the record and select View Request from the Row menu to view the details of a requested test revision.

- Select the record and then select View Original from the Row menu to view the original test definition.

- Select the appropriate test and select Approve from the Row menu to approve a test revision.

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

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

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

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

Reviewing Tests and Specifications

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

Understanding the Test/Specification Where Used Program

You can use the Test/Specification Where Used program (P37202) to identify which preference profiles contain a specific test or specification for quality testing. You can also use this program to review or revise preference profiles, specifications, or tests.

Form Used to Review Tests and Specifications

Form Name	FormID	Navigation	Usage
Quality Management Profile Revisions	W40318B	Quality Management Setup (G3741), Test/Specification Where Used Select a test or specification on the Test/Specification Where Used form, and select Preferences from the Row menu.	Review and revise tests and specifications.

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Form Name	FormID	Navigation	Usage
		Review or change the preference information on the Quality Management Profile Revisions form. Select a record, and then select an option from the Row menu to make other changes. Click OK.	

Reviewing Tests and Specifications

Access the Quality Management Profile Revisions form.

Setting Up Inclusion Rules for Test Results Tracing

To trace test results, you must set up inclusion rules. Inclusion rules are UDC 37/DC and you must include the document type that you want to trace in the UDC. When you trace test results for a specific lot, these codes enable you to limit the item ledger transactions that the system processes. You can review which lots are within a parent lot and all tests for the parent lot as well as the individual lots. Tracing helps you find test results for components of an assembled item or for an item that has been reclassified.

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

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

Description 2
Add text that further describes or clarifies a field in the system.

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

Setting Up Customer Billing Instructions for EnterpriseOne Quality Management

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

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

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Understanding Customer Billing Instructions

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

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

Prerequisite

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

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

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

Selecting a Customer for Which to Set Up Billing Instructions

Access the Work With Customer Master form.

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

Search Type

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

E: Employees

X: Ex-employees

V: Suppliers

C: Customers

P: Prospects

M: Mail distribution lists

TAX: Tax authorities

Setting Up Customer Billing Instructions for EnterpriseOne Quality Management

Access the Billing Information form.

Certificate Of Analysis Print

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

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

4 Processing Test Results

Understanding Test Result Processing

This section discusses:

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

Where to Process Test Results

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

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

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

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

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

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

Quality Management Information	Programs
Sales Order Management	Shipment Confirmation (P4205)

Test Result Processing

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

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

Test Results Entry Format

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

This table describes each format:

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

Lot Status

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

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

- You can set processing options for failed and passed lot status, so that the system prevents the lots from being sold or shipped until the testing is finished and the lots pass inspection.

- You can set a processing option to hold the lot as soon as it is brought into inventory, regardless of whether it passed quality testing or has not yet been tested.

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

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

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

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

- User-defined code list not set up.

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

Sample Numbering

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

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

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

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

System Integration

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

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

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

Program Functions	How to Use Test Results
Work Order Entry	When you create a work order, you can use Quality Preference Revisions (P40318) to maintain tests for the parent item.
Work Order Completions	When you enter work order completions, including quantity completed and quantity scrapped, you can: • Access the Test Revisions program (P3701) for any parent work order items that require testing upon completion. • Review work order generic text. • Set processing options for default lot, work order, and operation status.
Super Backflush	When you backflush labor and material for a work order, you can: • Access the Enter Test Results program (P3711) for any parent items that require testing. • Review generic text for the parent item and operations. **Note:** The work order routing step is user-defined as a pay point where test results are to be entered.
Work Order Time Entry	When you charge actual hours and quantities to a work order, you can: • Access the Enter Test Results program for completed items that require testing. • Review generic text for the parent item. • Set processing options for work order status and operation status. **Note:** Test results are entered against a specific routing step on the work order.
Bill Revisions	When you maintain bills of material, you can use the Quality Preference Revisions program to maintain tests for the parent item.
PO Receipts	When you receive items, you can access the Enter Test Results program for items that require testing.

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Program Functions	How to Use Test Results
Receipt Routing	When you review the location of goods within the receipts routing process and move them to another operation, you can access the Enter Test Results program for items that require testing.
Sales Order Entry	When you enter sales orders, you can use the Item Search program (P41200) to select the lot that meets the quality criteria for the customer and item that appear on the sales order.

Serial Number Selection for Test Results Entry (Release 9.2 Update)

When you access the Enter Test Results program (P3711) from the Row exit of the Hours and Quantities program (P311221) and the Super Backflush program (P31123) for a serialized item (lot process type 4, 5, 6, or 7), the system enables you to choose the serial number against which you want to enter the test results.

If the serial numbers are already generated for the work order in the Assign Serial Numbers program (P3105), the system displays the P3105 program before you enter the test results. Select the serial number to proceed to the P3711 program.

If serial numbers have not been assigned for the selected order, then the P3711 program generates the serial number for lot process types 5 and 6 using Next Numbering. In case of serialized items with processing types 4 and 7, the lot/serial number field is left blank.

> **Note:** In the processing options for the Hours and Quantities program (P311221) and the Super Backflush program (P31123), ensure that you specify the P3105 version that the system will use.

Selecting Tests for Results Entry

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

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

Understanding Where to Enter Test Results

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

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

Prerequisites

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

- Results Entry Format.

- Activate System Sample Numbering.

- Test Results Search.

- Status for a Failed Lot.

- Status for a Passing Lot.

- For test results entry at manufacturing work order completions, ensure that the Manufacturing Completions option on the Display Criteria Window form (W40318D) is selected for at least one test in the preference profile.

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

Forms Used to Select Tests for Results Entry

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

Selecting Tests in Preference Format

Access the Work With Test Results form.

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Choosing Tests in Order Number Format

Access the Work Order Completion Detail form.

To select tests in order number format:

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

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

Entering Test Results

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

Understanding Test Results

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

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

These are values for the Display/Evaluate Test field:

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

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Field Value	Description
	occurs in a similar fashion. If the last sample of the mixture is within tolerances, the product can be shipped.

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

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

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

When any test within a lot fails (based on all samples, average, or last occurrence), the system sets the lot status to the value that you defined in the Status for a Failed Lot processing option for the Enter Test Results program. All failed test results appear highlighted on forms with test results, including the Test Results Revisions and all inquiry forms.

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

Related Tasks

This table lists related tasks:

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

Electronic and Device Quality Records

Products such as pharmaceuticals, biotech, and medical devices require an audit trail for each batch, work order, or medical device manufactured.

An audit trail traces the manufacture of an item from design approval through manufacturing. The audit trail includes engineering changes introduced during the manufacture of the product. A quality assurance group must review the product prior to its release for sale or use.

You can review production records for a specific product and track defects. When you review records that are out of conformance, you can open a case for internal personnel to resolve the conformance issue.

You can create a case for a failed test. On the Test Results Revisions form, select a row for a failed test and select the Case Management option from the Row menu.

The system enables the Case Management option only when a value of **F** (fail) resides in the Pass Fail field.

The system calls the version of the Case Entry program (P90CG504) in add mode based on the version specified in the Case Entry Add Mode (P90CG504) processing option on the Versions tab of the Enter Test Results program. The system populates the Customer Number and Caller Number fields on the Add Case form from the tester field. The system also populates the item number, branch/plant, and lot number from the Test Results Revisions form.

Prerequisites

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

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

Set the Case Entry Add Mode (P90CG504) processing option on the Versions tab of the Enter Test Results program for version specific processing when you select the Case Management option on the Row menu.

Form Used to Enter Test Results

Form Name	FormID	Navigation	Usage
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results Click the Find button and select a test on the Work With Test Results form. Complete the fields in the detail area for each test and click OK on Test Results Revisions. The Result Value field appears highlighted until you enter a result, or if the test failed. You are not required to enter all results at the same time. However, until you enter test results for all samples of a required test, testing is incomplete and the lot will fail. The system will display an error message if the test results are not provided in the Result Value field for tests that are marked mandatory in the Test Revisions (P3701) program or	Enter test results The system evaluates each individual test and assigns a pass or fail code. The system updates the lot status as passing or failing, based on the processing options.

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Form Name	FormID	Navigation	Usage
		the Preference Profile Quality Management (P40318) program. If the system displays warning messages because of failed or empty test results, click OK repeatedly until all messages are cleared. When you do not enter text results for required tests, the system views the results as failing results.	
Add Case	W90CG504A	On the Test Results Revisions form, select the row for a failed test and select the Case Management option from the Row menu.	Enter a case for failed tests.

Entering Test Results

Access the Test Results Revisions form.

Result Value
Enter the result of the performed test.

O (overridden)
Enter the value which designates whether a test has been overridden. Values are:

1: Overridden

0: Not overridden

Test ID (test identification)
Enter the unique identification for a test performed on an item. For example: COL for Color test, DENS for Density Test, or CL-2 for Clarity Test.

Test Description
Enter brief information about the test.

Sample
Enter a number for a group of tests within the same sample.

Root Cause
Enter a UDC (37/RC) for the type of test.

Defect Source
Enter a UDC (37/SR) for the type defect.

Oper Seq (operation sequence)
A number used to indicate an order of succession.

Work Center

Enter a code that represents a high-level business unit. Use this code to refer to a branch or plant that might have departments or jobs, which represent lower-level business units, subordinate to it. For example, Dept. A or Job 123.

Copying Test Results

This section provides an overview of copy test results, lists a prerequisite, and discusses how to copy test results.

Understanding Copy Test Results

As you process manufacturing, purchasing, and inventory transactions for items, you can copy test results to reduce redundant test results entry. The Test Results Search and Select program (P3711W) allows you to select one record for item, branch/plant, location, lot, and order number which forms the full key.

For example, if you search on an item, then the test results header record displays all branch/plants, locations, and lots for the item. Items may or may not be associated with an order. You select one record from the list of available records.

You can copy test results using the following programs:

- Completions Workbench (P3119)
- Work Order Completions (P31114)

    You copy test results for a single order. The system does not support multi-line test results.
- Co/By Product Completion (P31115)
- Super Backflush (P31123)
- P O Receipts (P4312)
- Receipt Routing Movement and Disposition (P43250)
- Inventory Transfers (P4113)
- Item Reclassifications (P4116)

You set the Test Results Control (Y/N) option in the Branch/Plant Constants program (P41001) to enable the copy test results functionality in the JD Edwards EnterpriseOne system. The system stores the option setting in the Inventory Constants Tag File table (F41001T1).

The system calls the Test Results Search and Select program when you select the associated option from the Row menu. After you select a record to copy and click Select on the Test Results Search and Select form, the system copies the detail records of the selected header record to the current order in the Test Results table (F3711) and calls the Test Results Revisions program (P3711). You can add or change test results using the Test Results Revisions program.

> **Note:** Calling applications do not call the Test Results Search and Select program if test results exist for that item, branch/plant, location, lot, and order. If test results exist, then the copy functionality is not available as the system considers this to be update mode.

The Test Results Search and Select program is called from all programs except the inventory programs. When you perform inventory transfers or item reclassifications, the system directly passes the test result records from the source location and lot in the F3711 table to the destination location and lot in the F3711 table. The system does not copy test results if they already exist for a lot and location.

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When you enter the quantity to complete, select the Enter Test Results after Completion option, and click Save and Close on the Work Order Completion Detail form, the Test Results Search and Select form appears whether or not there is a quality record to copy. If the Test Results Search and Select form is blank, you can click Close and enter the first test results on the Test Results Revisions form. After that first completion, when you complete additional quantity, the Test Results Search and Select form is populated and you can copy test results.

Note: The Copy Test Results feature is not available from the Test Results Revisions program.

You cannot copy test results in the Certificate of Analysis (COA) program (R37900). You must copy the test results at every level in multi-level items so that the COA for multi-level tracing is maintained.

Note: The Copy Test Results feature uses the User Reference field (URRF) to hold a value of COPY for all copied records.

Prerequisite

Before you complete the tasks in this section, set the Test Results Control (Y/N) option in the Branch/Plant Constants program (P41001) to enable the copy test results functionality.

Forms Used to Copy Test Results

Form Name	FormID	Navigation	Usage
Test Results Search and Select	W3711WB	• Daily Processing - Repetitive (G3115), Completions Workbench Find and select a record on the Completions Workbench form, then select Test Results Rev. from the Row menu. • Daily Order Reporting - Discrete (G3112), Partial Completion or Full Completion Locate and select an order on the Work With Work Order Completions form, and then click Select. Select the Enter Test Results after Completion option on the Work Order Completion Detail form and click Save and Close. • Daily Order Reporting - Process (G3114), Partial Completion, Full	Copy test results.

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Form Name	FormID	Navigation	Usage
		Completion, or Completion with Backflush.	
		Locate and select an order on the Work With Work Order Completions form, and then click Select.	
		Specify a process item on the Work Order Completion Detail form, and click OK.	
		Select a record on the Co/By Completion Revision form, then select Test Results from the Row menu.	
		• Daily Order Reporting - Discrete (G3112), Completion with Backflush	
		Locate and select an order on the Work With Work Order Completions form, and then click Select.	
		Select the Enter Test Results after Completion option on the Work Order Completion Detail form and click Save and Close.	
		• Purchase Order Processing (G43A11), Enter Receipts by PO	
		Find and select a record on the Work With Purchase Orders to Receive form and click Select.	
		On Purchase Order Receipts, select Test Results from the Row menu.	
		• Receipt Routing, (G43A14),Status Inquiry	
		Find and select a record on the Work With Routing Statuses form, then select Test Results from the Row menu.	

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Copying Test Results

Access the Test Results Search and Select form.

1. Select a record.
2. Click Select.
3. Add or change test results on the Test Results Revisions form.

Entering Text for Test Results

After you enter test results, you can enter informative text for those test results, such as a description of the measuring equipment that you used. If you select the Print Text option on the Test Definition Revisions form, the system displays this text on the certificate of analysis.

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

Overriding Test Status

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

Understanding Test Overrides

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

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

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

Forms Used to Override Test Status

Form Name	FormID	Navigation	Usage
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results	Select a set of tests to override.

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

Overriding Test Status

Access the Test Status Revisions form.

To override test status:

1. Complete these fields, and click OK:

   ○ Disposition Code

   ○ Test Status

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

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

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

Test Status

Select P (passed) or F (failed).

Creating New Samples

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

- Set processing options for Enter Test Results (P3711).

- Override the number of samples.

- Create additional samples for retesting.

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Understanding Samples

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

If you are entering test results for the first time and you need to add more samples than you originally set up, you can override the number of samples defined for each test in the Quality Preference Revisions program (P40318) and the Test Revisions program (P3701). To do so, you must first set the processing option to display the Number of Samples field.

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

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

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

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

Prerequisite

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

Forms Used to Override the Number of Samples

Form Name	FormID	Navigation	Usage
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results. Click the Add button on the Work With Test Results form.	Override the number of samples for first time tests.
Test Results Revisions	W3711B	Quality Management Daily Operations (G3711), Enter Test Results Select a set of test results and click the Select button on the Work With Test Results form. Select New Sample from the Form menu.	Create additional samples for retesting.

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Form Name	FormID	Navigation	Usage
		The system creates one new sample for each test. If you need additional new samples, repeat this step. You can also select Copy Test on the Row menu to create one new sample for one test.	

Setting Processing Options for Enter Test Results (P3711)

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

Test Results

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

1. Results Entry Format

Specify the format for entering test results. Values are:

Blank Use the Preference format.

1: Use the Preference format, which organizes test results by branch/plant and customer number or item number.

2: Use the Order number format, which organizes test results by work order, sales order, or purchase order numbers.

3: Use the Compartment format, which organizes test results by load number and planning depot.

2. Default Tester

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

3. Minimum and Maximum Parameters

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

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

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

4. Number of Samples

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

Blank: Do not display.

1: Display.

5. Copy Generic Text

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

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Blank: Do not copy generic text.

1: Copy generic text added through the Test Revisions program.

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

6. Test Results Search

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

Blank: Do not search.

1: Search.

7. Record Nonconforming Product

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

Blank: Do not record.

1: Record.

8. Activate System Sample Numbering

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

Blank: Do not assign.

1: Assign.

9. Override Default Tester

Use this processing option to default the current user's address book number as the tester. Values are:

Blank: The system uses the address book number specified in the Default Tester processing option.

1: The system uses the address book number of the current user.

Security

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

1. Protect Date and Time

Specify whether to protect the date and time of tests. Values are:

1: Protect.

Blank: Do not protect.

2. Protect Tester ID

Specify whether to protect the address book number of the tester. Values are:

Blank: Do not protect.

1: Protect.

ORACLE

Lot Status

These processing options control lot availability and lot status update.

1. Status for a Failed Lot

Specify the status code for lots that have failed quality testing. Lots with this status cannot be shipped or sold. If you leave this processing option blank, the system allows failed lots to be shipped or sold. Lot status codes are user-defined codes (41/L).

2. Status for a Passing Lot

Specify the status code for lots that have passed quality testing, but should not be available immediately to ship or sell. For example, a passing lot might be held if additional approvals are necessary. If you leave this processing option blank, the system allows passing lots to be shipped or sold.

3. Lot Status Update

Specify how the system updates the status of lots. Values are:

Blank: Update only the status for the lot master if additional testing or approvals are needed before updating the status of lots in inventory.

1: Update the status for all lot locations. The status of a lot will be updated throughout inventory.

2: Display the Location Lot Status Change window to update the status for specific lot locations.

Versions

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

1. Certificate of Analysis (R37900)

Specify which version of the Certificate of Analysis (COA) Extract program (R37900) to use for printing the tests and test results for lots sold to a customer. If you leave this processing option blank, the system uses version ZJDE0001.

2. Product Test Report (R37901)

Specify the version of the Product Test Report Extract program (R37901) to use for printing test results. You use the report to review test results for a work order, purchase order, or lot number. If you leave this processing option blank, the system uses version ZJDE0001.

3. Trace Test Results (P37201)

Specify which version of the Trace Test Results program (P37201) to use for reviewing the test results for an assembled item and its components or for an item that has been reclassified. If you leave this processing option blank, the system uses version ZJDE0001.

4. Test Revisions (P3701)

Specify the version of the Test Revisions program (P3701) you want to use. The version specifies the default status and whether the system uses workflow and logs history records. If you leave this processing option blank, the system uses version ZJDE0001.

5. Exit to Preferences (P40318)

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

6. Case Entry Add Mode (P90CG504)

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Specify the version of the Case Entry program (P90CG504) you want to use in Add mode. You use this program to create a case if one of the test steps fails. If you leave this processing option blank, the system uses version ZJDE0001.

Overriding the Number of Samples

Access the Test Results Revisions form.

To override the number of samples for first time tests:

1. Complete these fields:

    - Branch/Plant

    - Lot/SN

    - Item Number

2. Enter the number of samples that you need for the test in the Number of Samples field.
3. Complete these optional fields:

    - Location

    - Customer Number

4. Select Preference from the Form menu.

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

Reviewing Test Results

The test results contain important information that can help you closely monitor product quality.

You can review test results to help you:

- Make timely decisions about product quality to reduce the high costs of rework and scrap.

- Reduce labor costs by minimizing the time spent inspecting material, collecting data, and reworking or repairing defective material.

- Reduce service trips and material scrap costs by identifying inferior components before shipment.

- Improve overall product quality and customer satisfaction.

Note:

- *"Processing Sales Orders"," Confirming Shipments", "Understanding Additional Order Processing During Ship Confirm" in the   JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide   .*

Working with External Test Results

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

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

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

Reviewing Test Results by Lot Number

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

- Review test results by lot number.

- Locate test results by item number and test ID.

Understanding Test Results by Lot Number

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

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

- When you access Test Results Inquiry from the JD Edwards EnterpriseOne Inventory Management system using the Lot Availability (P41280) or Lot Master Revision program (P4108), you see test results exactly as they were input.

- When you access Test Results Inquiry from the Sales Order Entry program (P4210) using the Item Search Returns Quantity program (P40ITM2), the system performs an online evaluation for the selected lot.

  The system uses the customer number from the Sales Order Entry program to select tests using preference profiles. The system uses those tests to reevaluate the lot. Although the lot might pass inspection according to manufacturing specifications, it might fail inspection according to customer specifications.

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

When you enter a sales order, you can:

- Use Test ID and test ranges to filter for items that meet the customer requirements on the Selection Criteria Window form.

- Locate items based on the Allowed Minimum or Allowed Maximum fields.

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- Determine whether the lots that you review in the Item Search Returns Quantity program meet the customer or manufacturing specifications.

- Add lots to the sales order that meet the customer requirements.

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

Forms Used to Review Test Results by Lot Number

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

Reviewing Test Results by Lot Number

Access the Test Results Inquiry form.

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

Locating Test Results by Item Number and Test ID

Access the Tested Lot Search form

Lot Status (Release 9.2 Update)
A user defined code (41/L) that indicates the status of the lot. When NBLOTSTS is set to **No** or NBLOTSTS is not present in EnterpriseOne Control System program (P99410), you leave this field blank to indicate that the lot is approved. All the other codes indicate that the lot is on hold.

When NBLOTSTS is set to **Yes**, the lot status is validated by a special handling code in 41/L. All codes containing the special handling code **1** indicate that the lot is approved. All codes containing special handling codes other than 1 indicate that the lot is on hold.

On the Item/Location Information (P41024) or Location Lot Status Change (P4108) forms, you can assign a different status code to each location in which a lot resides.

Expiration Date
Enter the date on which a lot of items expires.

The system automatically enters this date if you have specified the shelf life days for the item on Item Master Information or Item Branch/Plant Information.

The system calculates the expiration date by adding the number of shelf life days to the date that you receive the item.

You can commit inventory based on the lot expiration date for items. You select how the system commits inventory for an item on Item Master Information or Item Branch/Plant Information.

Quantity Available

Enter a number that indicates the quantity that is available.

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

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

Tracing Test Results

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

Understanding the Trace Test Results Program

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

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

Form Used to Trace Test Results

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

Tracing Test Results

Access the Work With Trace Test Results form.

Managing Failed Lots

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

Understanding How to Manage Failed Lots

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

Prerequisite

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

Form Used to Manage Failed Lots

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

Managing Failed Lots

Access the Nonconforming Test Result Revisions form.

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

Order Number

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Enter a number that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on.

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

Reviewing Tested Lots by Preference Profile

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

Understanding the Test Results Workbench Program

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

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

Forms Used to Review Tested Lots by Preference Profile

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

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Reviewing Tested Lots by Preference Profile

Access the Test Results Workbench Detail form.

5   Appendix A - Delivered Workflow for EnterpriseOne Quality Management

Delivered Workflow for EnterpriseOne Quality Management

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

Test Definitions Approval

This section discusses the Test Definitions Approval workflow.

Description

Workflow Description

The system sends a workflow message to a specified approver when you enter or change a test definitions. The test remains at a status of P (pending) and cannot be used until the approver changes the test status to A (Approved).

Workflow Trigger

When workflow is turned on in the processing options and a test definition changes or is entered.

Workflow Action

The approver receives a message in the workcenter to approve the test definition. When the approver selects the message in the workcenter, the system displays the Quality Management Approvals Workbench, where the approver can review the test definition and select Approve from the Row menu to approve the test.

Workflow Objects

System

37

Workflow Object Name

JDEQMAPRV1

Object ID

N3700070

Event Description / Function Name

F3701ProcessTestMasterData

Sequence / Line Numbers

572, 603, 703

Specification Definitions Approval

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

Description

Workflow Description

The system sends a workflow message to a specified approver when a they enter or change a specification definition. The specification remains at a status of P (Pending) and the specification cannot be used until the approver changes the specification status to A (Approved).

Workflow Trigger

When workflow is turned on in the processing options and entered or changed in a specification definition.

Workflow Action

The approver receives a message in the work center to approve the specification definition. When the approver selects the message in the work center, the system displays the Quality Management Approvals Workbench, where the approver can review the specification definition and select Approve from the Row menu to approve the specification.

Workflow Objects

System
37

Workflow Object Name
JDEQMAPRV2

Object ID
N3700100

Event Description / Function Name
F3702ProcessSpecDefinitionMast

Sequence / Line Numbers
216, 250, 298

Quality Preference Approval

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

Description

Workflow Description

The system sends a workflow message to a specified approver when they enter or change a quality preference. The preference remains at a status of P (Pending) and the preference cannot be used until the approver changes the preference status to A (Approved).

Workflow Trigger

When workflow is turned on in the processing options and is entered or changes a quality preference.

Workflow Action

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The approver receives a message in the work center to approve the quality preference. When the approver selects the message in the workcenter, the system displays the Quality Management Approvals Workbench, where the approver can review the preference and select Approve from the Row menu to approve the preference.

Workflow Objects

System

37

Workflow Object Name

JDEQMAPRV3

Object ID

N3700340

Event Description / Function Name

F40318UpdateQualityPreferences

Sequence / Line Number

53

6 Appendix B - EnterpriseOne Quality Management Reports

EnterpriseOne Quality Management Reports

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

- Setup reports
- Test results reports

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

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

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

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

EnterpriseOne Quality Management Reports: A to Z

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

Report ID and Report Name	Description	Navigation
R37410 Test Definition Report	Tests for a branch/plant.	Quality Management Setup (G3741), Test Definition Report
R37415 Specifications Report	Test specifications for a branch/plant.	Quality Management Setup (G3741), Specifications Report
R37420 Item Test Specifications (Sometimes referred to as the Preference Report)	Test specifications by customer, customer group, item, or item group for the branch/plant.	Quality Management Setup (G3741), Item Test Specifications Access the Item Test Specifications form.

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

EnterpriseOne Quality Management Reports: Selected Reports

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

R37410 - Test Definition Report

Includes all of the tests for a branch/plant that you select. Use this information to review and maintain quality tests for all of the products.

Processing Options for the Test Definition Report (R37410)

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

Workflow

1. Enter the test status for selecting test definitions

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

Blank: Active/Approved

1: Pending

2: History

3: Rejected

2. Enter the As of Date for selecting test revisions
Specify a date that indicates:

- ○ When a component part is no longer in effect on a bill of material.

- ○ When a routing step is no longer in effect as a sequence on the routing for an item.

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

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

R37415 – Specifications Report

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

Processing Options for the Specifications Report (R37415)

These processing options control default processing for the Specifications report.

Defaults

1. Enter the specification status for selecting specification definitions
Specify a user-defined code (00/WS) that indicates the approval status. Values are:

Blank: Active/Approved

1: Pending

2: History

3: Rejected

2. Enter As of Date
A date that indicates:

- ○ When a component part is no longer in effect on a bill of material.

- ○ When a routing step is no longer in effect as a sequence on the routing for an item.

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

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

R37420 – Item Test Specifications

Includes all test specifications by customer, customer group, item, or item group for the branch/plant that you select. Use this information to maintain and review preference profiles within the business.

Processing Options for Item Test Specifications (R37420)

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

Print

Print

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

Workflow

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

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

Blank: Active/Approved

1: Pending

2: History

3: Rejected

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

A date that indicates:

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

  You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in the JD Edwards EnterpriseOne Product Costing, JD Edwards EnterpriseOne Shop Floor Management, and JD Edwards EnterpriseOne Capacity Requirements Planning systems. The JD Edwards EnterpriseOne Material Requirements

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Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.

R37470 - Test Results Worksheet Report

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

Processing Options for the Test Results Worksheet (R37470)

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

Print

Print

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

Preference

Preference

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

Text

Text

Specify whether to Print Generic Text. Values are:

Blank: Text will not print.

1: Print Generic Text from Test Revisions (P3701).

2: Print Generic Text form Preference Profiles (P40300).

R37900 - Certificate of Analysis Extract Report

Based on data that you select, the system searches for test results for the related sales order information. If you set the processing option for trace processing, the system searches for multilevel test results for each lot that it locates. The system prints all test results for each lot. The lot expiration date, additional lot information, tester ID and name are also included in the extract (Release 9.2 update).

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

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

Prerequisites

Before printing the Certificate of Analysis Extract report:

- Determine which tests and generic text to print on the certificate of analysis.

- Determine which customers should receive a certificate of analysis.

- Determine the type of transaction records to use for tracing lots.

Processing Options for the Certificate of Analysis Extract (R37900)

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

Defaults

These processing options control the address that appears on the certificate of analysis, as well as the override Next Status code on sales orders. To override the Next Status code, the system uses values that you have set up in a user-defined code table (40/AT).

1. Address Type

Specify which address to print on the Certificate of Analysis. Values are:

Blank: Ship to address

1: Ship to address.

2: Sold to address.

3: Parent address.

2. Next Status

Specify whether to override the Next Status code if you need to indicate on a sales order that you printed a Certificate of Analysis.

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

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

Extract

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

Extract Table

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

Blank: Clear the Certificate of Analysis extract table each time the report is run.

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1: Do not clear the Certificate of Analysis extract table (save history information), to allow reprints.

Trace

This processing option controls whether you trace test results.

Trace

Specify to control whether the system traces test results for lots. You can find test results for an assembled item, the components of the assembled item, or for an item that has been reclassified. Values are:

Blank: Do not trace test results.

1: Trace single level test results by lot.

2: Trace multilevel test results by lot.

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

Preference

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

Preference

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

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

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

Print

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

1. Certificate of Analysis (R37460)

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

2. User-Defined Program

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

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

3. User-Defined Version

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

Enter the version of the customized certificate to print.

4. Language to Print

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

Blank: Default language.

1: Customer preferred language.

Processing Options for the Certificate of Analysis (R37460)

These processing options control default processing for the Certificate of Analysis (R37460) report.

1. Print Generic Text
Use this processing option to print the Generic Text from the Results file (F3711).

Blank: The Generic Text will not be printed.

1: The Generic Text will be printed.

2. Print Preferred Minimum and Maximum
Use this processing option to print the Preferred or Allowed Minimum and Maximum.

Blank: The Allowed Minimum and Maximum will be printed.

1: The Preferred Minimum and Maximum will be printed.

3. Print Lot Grade (Release 9.2 Update)
Use this processing option to print the Lot Grade.

Blank: The Lot Grade will not be printed.

1: The Lot Grade will be printed.

4. Print Lot Potency (Release 9.2 Update)
Use this processing option to print the Lot Potency.

Blank: The Lot Potency will not be printed.

1: The Lot Potency will be printed.

5. Print Country of Origin (Release 9.2 Update)
Use this processing option to print the Country of Origin.

Blank: The Country of Origin will not be printed.

1: The Country of Origin will be printed.

6. Print Lot Best Before Date (Release 9.2 Update)
Use this processing option to print the Lot Best Before Date.

Blank: The Best Before Date will not be printed.

1:The Best Before Date will be printed.

7. Print Lot Sell By Date (Release 9.2 Update)
Use this processing option to print the Lot Sell By Date.

Blank: The Sell By Date will not be printed.

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1: The Sell By Date will be printed.

8. Print User Lot Date 1 (Release 9.2 Update)
Use this processing option to print the User Lot Date 1.

Blank: The User Lot Date 1 will not be printed.

1: The User Lot Date 1 will be printed.

9. Print User Lot Date 2 (Release 9.2 Update)
Use this processing option to print the User Lot Date 2.

Blank: The User Lot Date 2 will not be printed.

1: The User Lot Date 2 will be printed.

10. Print User Lot Date 3 (Release 9.2 Update)
Use this processing option to print the User Lot Date 3.

Blank: The User Lot Date 3 will not be printed.

1: The User Lot Date 3 will be printed.

11. Print User Lot Date 4 (Release 9.2 Update)
Use this processing option to print the User Lot Date 4.

Blank: The User Lot Date 4 will not be printed.

1: The User Lot Date 4 will be printed.

12. Print User Lot Date 5 (Release 9.2 Update)
Use this processing option to print the User Lot Date 5.

Blank: The User Lot Date 5 will not be printed.

1: The User Lot Date 5 will be printed.

13. Print Tester ID and Name on COA Form (Release 9.2 Update)
Use this processing option to print the Tester ID and Name on the Certificate of Analysis (COA) form.

Blank: The Tester ID and Name will not be printed.

1: The Tester ID and Name will be printed.

R37901 - Product Test Report

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

Based on data that you select, the system searches for test results for the related order information. If you set the processing option for trace processing, the system searches for multilevel test results for each lot that it locates. The system prints all test results for each lot.

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Processing Options for Product Test Report (R37901)

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

Extract

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

Retain Extracted Information

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

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

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

Trace

This processing option controls whether you trace test results.

Trace Test Results

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

Blank: The system does not trace test results.

1: The system performs a single level trace.

2: The system performs a multi level trace.

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

Print

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

User-defined Report and 2. User-defined Version

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

Version

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

Product Test Report (R37450)

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

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7   Appendix C - Delivered User Defined Objects for Quality Management (Release 9.2 Update)

Delivered User Defined Objects for Quality Management (Release 9.2 Update)

This appendix discusses delivered user defined objects (UDOs) that you can use with the Quality Management system.

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8 Glossary

Accept Percentage and Accept Quantity

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

Blank: accept quantity

1: display/evaluate

Allowed Maximum

Enter the highest value for a passing test result.

Allowed Minimum

Enter the lowest value for a passing test result.

Customer Number

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

Item Number

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

Number of Samples

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

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Preferred Maximum

Enter the highest value for the preferred test result. This value must be less than or equal to the allowed maximum value. Use the preferred maximum value to measure quality to a more precise specification than a customer requests.

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

Preferred Minimum

Enter the lowest value for the preferred test result. This value must be greater than or equal to the allowed minimum value. Use the preferred minimum value to measure quality to a more precise specification than a customer requests.

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

Print Test

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

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

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

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

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

Property

Enter the item attribute that is being tested.

Sample Percent

Enter the percentage of an order quantity that determines the number of samples to create in Test Results Revisions. For example, if the sample percentage is 50 percent and the order quantity is 10, then 5 samples will be created in Test

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Results Revisions. Use either this field or **Number of Samples** to control how many samples to create. You can use this field only with the order mode of **Test Results Revisions**.

If the sample percentage is 100 percent, then testing is required for every unit on the order. You cannot use **Accept Percentage or Accept Quantity**, since all units on the order must pass for the lot to pass.

Sequence

Enter the sequence in order to set up the order in which the valid environments are displayed.

Target Value

Enter the preferable or target test result within the test results range. As the system does not test against a target value, this field is for the information only.

Test Method

Enter a description of how to run a quality test. The test method is useful to both the company Quality Control department and the customers. For example:

Test: Viscosity

Method: RVF #4 @10RPM

Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.

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