PeopleSoft®

EnterpriseOne Xe Quality Management PeopleBook

September 2000

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SKU XeEAQU

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Overviews

The Quality Management system enables you to record and manage data pertaining to the quality of your products. You can verify that the materials that you produce meet specifications that you define.

This section provides overview information about the quality management process, as well as information about how the Quality Management system operates.

Overviews consist of the following:

- Industry Overview
- Quality Management Overview

Industry Overview

Total Quality Management (TQM), Continuous Improvement, Quality Assurance, and Quality Systems are phrases that refer to the concept of measuring quality and 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 customer's quality expectations in the most timely and cost effective manner.

A quality management system involves entering data, analyzing data, and determining if the product can be moved forward in the procurement, manufacturing, and distribution processes. According to the International Organization for Standardization (ISO), a quality system should include provisions for quality assurance in design, development, production, installation, and servicing. A company can document all of these processes and become certified through an ISO program, but just documenting the process does not mean that the process is successful. Management commitment to the process and to fixing the problems is critical to the success of a quality improvement program.

The Quality Management system is a tool that can be used to support a TQM program. It provides an integrated, yet flexible solution to collect, verify, and manage the data that is needed to meet internal quality standards and support customer requirements.

Industry Environment and Concepts for Quality Management

Under a quality management system, materials and products are tested, inspected, and monitored at every step of the manufacturing process.

Companies often establish acceptable standards for raw materials. Inspecting incoming materials verifies that vendors are meeting their contract specifications and that quality materials are being used. Discovering problems at an early stage in the manufacturing process saves time and money both by rejecting poor quality materials and by avoiding delays in production schedules because of flawed materials.

In a quality management system for manufacturing, data is collected to check the integrity of the process and the equipment. The quality of the products is tested at key points in the production cycle. Discontinuing the production of products with poor quality saves time and money. Likewise, continuing to work with poor products results in additional operating costs. These costs are wasted because the product never reaches the customer.

The customer determines the level of quality that is required. Poor quality results in a dissatisfied customer, who then looks for an alternative supplier or product, which ultimately means lost business to you. Therefore, the ability to obtain and validate information about quality throughout the manufacturing life cycle is critical.

Idea to Action/Competitive Advantage

The following table describes typical problems or issues for quality or engineering managers. The business activator that resolves each problem and the return on investment are included.

Can I specify that a test is required or optional?	Processing options allow you to specify if a test is required or optional. Tests can be mandatory or optional. By reporting only when required, you reduce labor requirements while maintaining data collection integrity.
How can I create tests that will be statistically significant?	A test can have its sample size based on a fixed amount or by a percentage of the quantity in the lot. This ensures that an accurate number of samples represent the lot that is being processed. This helps to reduce the loss of product by identifying problems at the source. Labor costs are reduced by requiring data collection for only the appropriate quantity.
How can I format tests when creating tests?	The data format for a test can be either numeric or alphanumeric. Numeric entries can be tests against minimum or maximum limits. User defined code tables can be set up to include valid responses for numeric and alphanumeric entries. Using user defined codes for data entry saves time and reduces errors, therefore reducing costly mistakes. User defined code tables help to provide consistency in recording observation (subjective) types of data, which is useful for future troubleshooting.
Can I design a test to analyze only a sample of a lot?	You can design a test in several different ways. For example, you can require that every sample pass the test, that the average of the samples must pass the test, or that the last occurrence of the sample must pass the test.

Can I assign test criteria that allows a sample or lot to pass?

A test can require that a minimum number of the samples must pass. For example, if four out of five readings meet the criteria, the material is considered acceptable.

The system facilitates the pass or fail criteria check, which reduces labor input and mistakes that delay the movement of the material.

Can I design a Certificate of Analysis report based on a customer's requirements to meet ISO 9000 standards?

When defining a test, you can use processing options to specify whether to print a Certificate of Analysis.

For customers who do not need ISO 9000 testing, the data on the report can verify that a quality management program exists.

How can I control revisions to tests, specifications, and preferences?

You can design an approval process for changes and additions of tests, specifications, and preferences. Using Workflow Management, you can set up approval routing to control the changes to quality management tests. An approval process ensures system integrity and meets customer specifications, such as those necessary for ISO 9000 compliance. The approval process reduces the processing time that is required for changes.

How can I most efficiently manage my tests?

By defining specifications, you can group tests for easier access and management, therefore reducing labor costs. Specifications also make data entry easier and more intuitive. Specifications also enable you to trace test results and ensure data integrity across other systems.

How do I perform data collection and run quality tests at various times throughout the procurement, manufacturing, and distribution processes?

By defining preferences, you can collect data at various times throughout the procurement, manufacturing, and distribution processes. For example, you might define a preference that the system uses to require quality management tests when you receiving materials from vendors. Often, you use these tests to ensure acceptable raw materials.

Can I reuse tests?

You can use preferences to design test parameters for a specific customer, customer group, item, item group, and branch/plant.

By reusing tests, you can provide consistency in test definitions.

What happens when a sample or lot fails quality testing?

By using lot tracking and lot statuses, you can place a lot at a status that prevents the system from continuing to process the lot when it has failed quality testing.

How do I track samples?

Through a processing option, you can enter input sample numbers manually or the system can automatically assign sample numbers by using Next Numbers. The advantage to using automatic sample numbering is that you ensure data integrity in the system and minimize the amount of time that a sample is held from further processing.

Can I override test results?

Security settings control whether you can override a test status. A sample might fail a test at one point in the process, but can still pass the final quality inspection, provided that you override the results from the portion of the test where the sample failed. By overriding the test results, you can prevent product shipment delays.

Can I conduct retests on the same sample?

You can enter additional test samples and test results for each test, or you can repeat all tests.

Quality Management Overview

The J.D. Edwards Quality Management system helps you record and manage data that relates to the material quality of your 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 your business by doing the following:

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

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

Using this system, you can verify whether the material that you produce meets your specifications at different points in your 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 accomplish the following:

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

Features

The Quality Management system includes the following features:

Tests

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

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

Specifications

Specifications enable you to group tests that belong together or should be performed together.

Examples include mechanical, visual, and electronic specifications.

Preference Profiles

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

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

Test Results Entry

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

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

- When entering receipts for items on purchase orders
- When routing receipts for purchase orders and work orders
- When moving items to stock after completed production

- When entering hours and quantities
- When confirming shipments or packages
- When confirming ECS bulk or package loads
- When entering sales orders
- When reviewing lots

Information Review

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

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

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

Generic Text Entry

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

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

System Integration

Quality Management works closely with features in the following systems:

- Inventory Management
- Procurement
- Product Data Management

- Shop Floor Management
- Sales Order Management

Tables

The Quality Management system uses the following tables:

F3701 - Test Definition	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 - Specification Master	Contains the description of the specification and effectivity dates.
F37021 - Specification Detail	Contains information about the different tests that are grouped within the specification.
F3703 - Non-Conforming Material	Contains records of failed tests.
F3711 - Test Results	Contains the test results for an item and lot number in inventory or on a work order, purchase order, or sales order.
F3711Z1 - Test Results Work File	Contains test results uploaded from a LIM (Laboratory Information Management) system.
F37900 - Certificate of Analysis Extract	Contains test results that print on the Certificate of Analysis or Product Test Report.
F40318 - Preference Profiles for Quality Management	Identifies which tests or specifications are required for an item, item group, customer, or customer group.
F40318R - Preference Profiles Resolution History	Contains historical information on the number of times a preference has been used on sales orders.

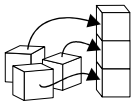
Menu Overview

The Quality Management system uses the following menus:

Quality Management (G370)

Daily Processing

- Quality Management Daily Operations (G37)



System Setup

- Quality Management Setup (G3741)

Setup

System Setup

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

Before you can use Quality Management, you must set up the following information:

- Branch/plant constants
- Tests
- Specifications (optional)
- Preference profiles

With the exception of setting up Branch/Plant constants in Inventory Management, these setup activities are performed in the Quality Management system.

Note: In order to use the Quality Management system, you need to activate it at the system level and the branch/plant level.

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

- ❑ Activating Quality Management
- ❑ Setting up branch/plant constants
- ❑ Setting up tests
- ❑ Setting up specifications (optional)
- ❑ Setting up preference profiles
- ❑ Working with approval processing
- ❑ Reviewing tests and specifications
- ❑ Setting up inclusion rules for test results tracing (optional)
- ❑ Setting up customer billing instructions (optional)

Before You Begin

- ❑ To measure item quality by lot, activate lot control for the items that you want to measure. See *Entering Information for Lots* in the *Inventory Management Guide*.

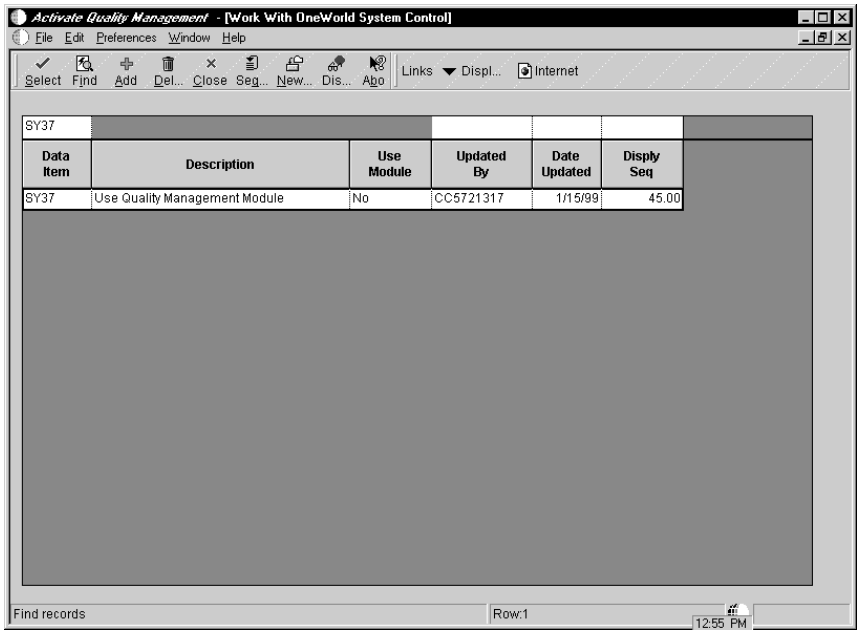
- ❑ To measure item quality, determine which characteristics to include in the test for each item that you are measuring.

Activating Quality Management

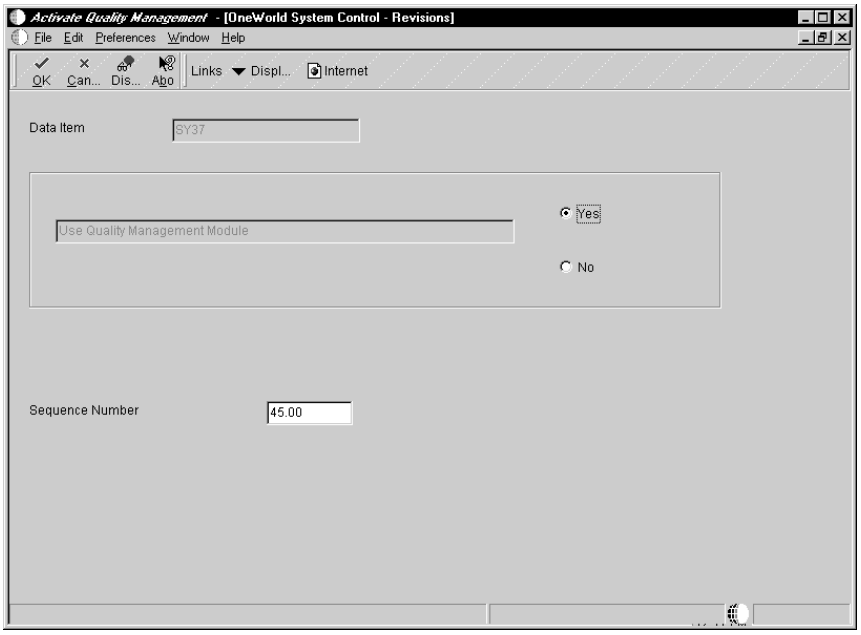
To use Quality Management, you must activate it at the system level.

To activate Quality Management

From the Quality Management Setup menu (G3741), choose Activate Quality Management.



1. On Work With OneWorld System Control, type SY37 in the following field and click Find:
   - Data Item
2. Choose the row with SY37 as the Data Item and click Select.



3. On OneWorld System Control – Revisions, click Yes for the following option (Use Quality Management Module) and click OK:
   - Module Existence
4. On Work With OneWorld System Control, click Find.
5. Verify that the Use Module field is set to Yes and click Close.

Field	Explanation
Module Existence	A code that indicates that a particular module has been installed in your system.

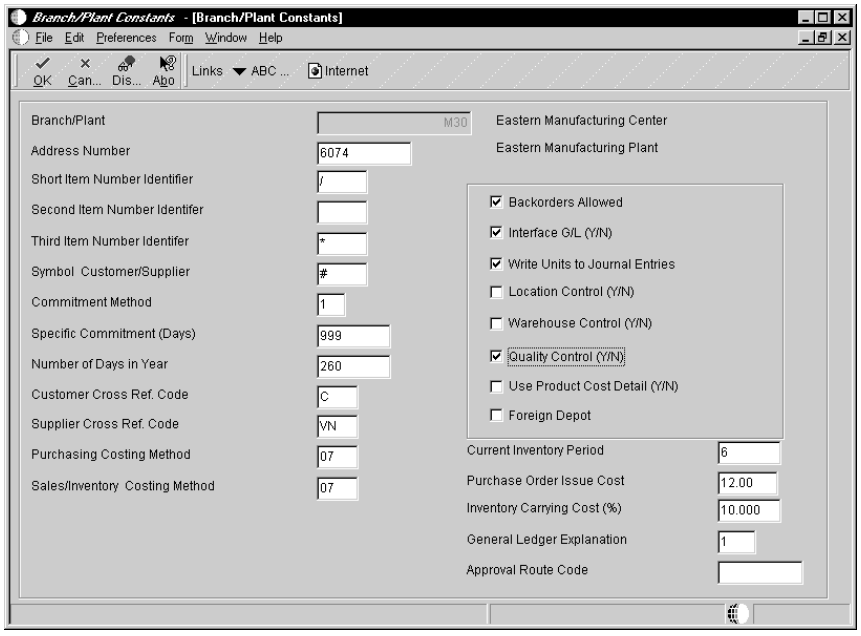
Setting Up Branch/Plant Constants

You must activate the Quality Management system for each branch/plant that you want to include in quality testing.

▶ To set up branch/plant constants

From the Inventory Setup menu (G4141), choose Branch/Plant Constants.

1. On Work With Branch/Plant Constants, to locate a specific branch plant, complete the following field and click Find:
   - Business Unit
2. Choose the branch/plant and click Select.



3. On Branch/Plant Constants, choose the following option:
   - Quality Control (Y/N)

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

Setting Up Tests

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

For each test, you can define the following:

- The test description
- Test effective and expiration dates
- How to record results
- The number of test samples
- How to evaluate results
- The information to print on the Certificate of Analysis
- Test methods and reference numbers of the American Society of Testing Material (ASTM)

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

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

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

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

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

Setting up tests consists of the following tasks:

- ❑ Defining tests
- ❑ Entering user defined codes
- ❑ Entering text for tests
- ❑ Reviewing tests

See Also

- *Setting Up Preferences* for information on customizing tests and specifications
- *Printing Setup Reports* for a description of the Test Definition report

Defining Tests

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

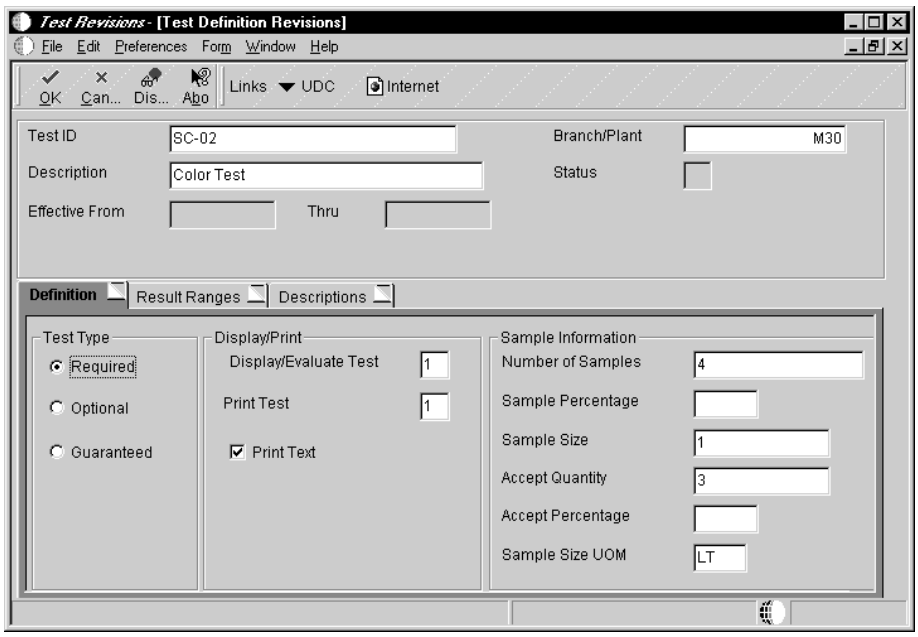
Before You Begin

- ❑ To activate workflow and use the approval process, set the processing option for Test Revisions.
- ❑ To log changes to test definitions, set the processing option for Test Revisions.

▶ To define tests

From the Quality Management Setup menu (G3741), choose Test Revisions.

1. On Work With Test Definitions, click Add.

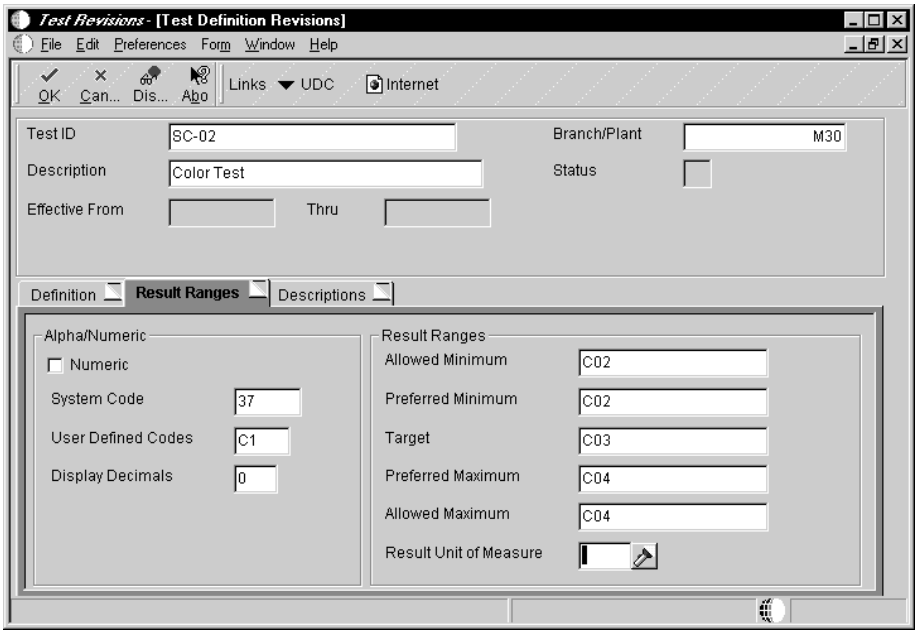


2. On Test Definition Revisions, complete the following fields:
   - Test ID
   - Description
3. Complete the following optional fields:
   - Branch/Plant
   - Effective From
   - Thru

   If you leave the Branch/Plant field blank, the test is valid for all branch/plants.
4. On the Definition tab, complete the following fields to define how to record test results:
   - Test Type
   - Display/Evaluate Test
5. To specify which information is printed on the Certificate of Analysis, complete the following fields:
   - Print Test
   - Print Text
6. To define information about the sample, complete the following fields:
   - Number of Samples
   - Sample Percentage
   - Sample Size

- Accept Quantity
- Accept Percentage
- Sample Size UOM

7. Click the Result Ranges tab.



8. Complete the following fields
   - Display Decimals
9. Choose the following option:
   - Numeric
10. Complete the following optional fields:
    - System Code
    - User Defined Codes

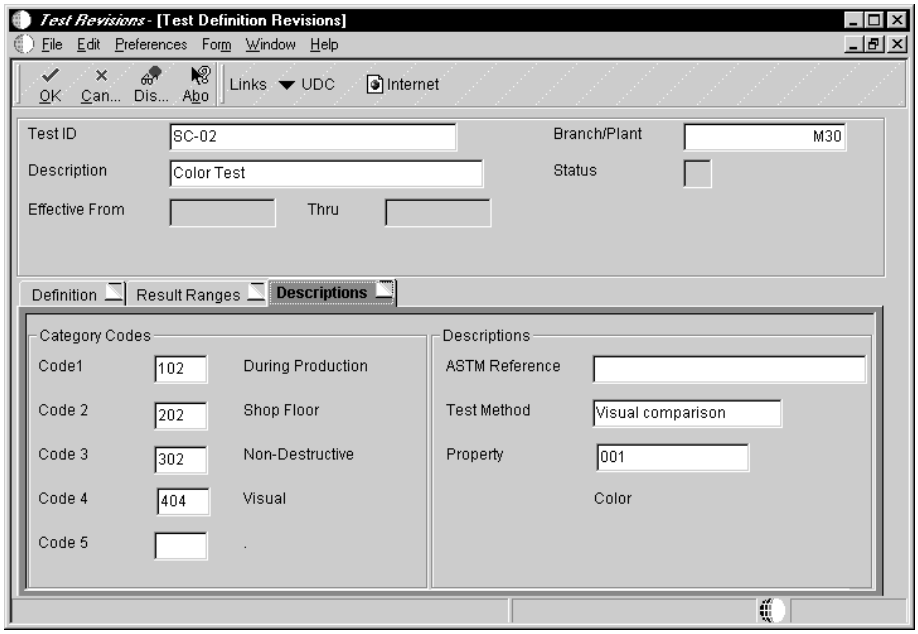
    For tests that are alphanumeric (Numeric option is not selected), you do not need to setup a user defined code list. If you do not select the Numeric option, you can enter free-form test results. Any non-blank value in the test result passes.

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

11. To define information about the sample and how to evaluate it, complete the following fields:
    - Allowed Minimum

- Target
- Allowed Maximum
- Result Unit of Measure

12. Complete the following optional fields:
    - Preferred Minimum
    - Preferred Maximum
13. Click the Descriptions tab.



14. Complete the following fields to categorize tests into groups for reporting purposes:
    - Test Method
    - Property
15. To further categorize tests, complete any of the category code fields.
16. To identify a recommended testing procedure of the American Society of Testing Material, complete the following optional field, which is for information only:
    - ASTM Reference

Field	Explanation
Branch/Plant	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. NOTE: The system uses the job number for journal entries if you do not enter a value in the AAI table.
Test ID	The unique identification for a test to be performed on an item. For example: COL Color test DENS Density Test CL–2 Clarity Test
Description	A brief description of an item, a remark, or an explanation.
Effective From	A date that indicates one of the following: • When a component part goes into effect on a bill of material • When a routing step goes into effect as a sequence on the routing for an item • When a rate schedule is in effect The default is the current system date. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in Product Costing, Shop Floor Management, and Capacity Requirements Planning. The Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.

Field	Explanation
Thru	A date that indicates one of the following: • When a component part is no longer in effect on a bill of material • When a routing step is no longer in effect as a sequence on the routing for an item • When a rate schedule is no longer active The default is December 31 of the default year defined in the Data Dictionary for Century Change Year. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in Product Costing, Shop Floor Management, and Capacity Requirements Planning. The Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.
Test Type	Controls how the system processes tests as you enter test results. For example: R Required – Result values are required during Results Entry. The system does not allow an item to pass quality inspection until you enter results for each required test. O Optional – Result values are optional during Results Entry. The system does not require the entry of a result for each optional test. However, if you input failing results, the item fails quality inspection. G Guaranteed – Result values are optional during Results Entry. You can control whether Guaranteed tests appear as you enter test results with the 'Display Test' field on Test Revisions. In addition, guaranteed tests print on the Certificate of Analysis.

Field	Explanation
Display/Evaluate Test	A code that determines how test results appear in Test Results Inquiry when accessed from sales orders. This code also determines how a test is to be evaluated. Valid values are: 0 Do not display tests when using Test Results Revisions or result inquiry programs. This value is only allowed for tests of type G, Guaranteed. 1 Display all occurrences of a test when using result inquiry programs. To provide for the entry of result values, all occurrences of a test appear in Test Results Revisions. The system uses all result values to determine if a lot passes or fails. 2 Display only the average result record when using result inquiry programs. All occurrences of a test appear in Test Results Revisions. The system uses only the average test result to determine if a lot passes or fails. 3 Display the last occurrence of a test when using result inquiry programs. The last occurrence is the test result last entered in Test Results Revisions. The system uses only the last test result to determine if a lot passes or fails.
Print Test	A code used to determine whether or not a test will print on the Certificate of Analysis. The valid values are: 0 The test will not print on the Certificate of Analysis. 1 Print all occurrences of a test on the Certificate of Analysis. 2 Print just the average test result record when printing the Certificate of Analysis. 3 Print the last occurrence of a test when printing the Certificate of Analysis. The last occurrence will be the test results record that was entered last using Test Results Revisions.
Print Text	Determines whether the generic text for an item that is input through Test Result Revisions (P37111) will print on the Certificate of Analysis. Valid values are: 1 Print the generic text associated with this test in Test Results Revisions on the Certificate of Analysis. 0 Do not print any generic text associated with this test in Test Results Revisions on the Certificate of Analysis.
Number of Samples	The number of samples to be taken for the test.

Field	Explanation
Sample Percentage	The percentage of an order quantity that determines the number of samples to create in Test Results Revisions. For example, if the sample percentage is 50 percent and the order quantity is 10, then 5 samples will be created in Test Results Revisions. Use either this field or Number of Samples to control how many samples to create. You can use this field only with the order mode of Test Results Revisions. If the sample percentage is 100%, then testing is required for every unit on the order. You cannot use Accept Percentage or Accept Quantity, since all units on the order must pass for the lot to pass.
Sample Size	The quantity of one sample to be taken for the test. As the system does not use this field, it is for your information only.
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 the following fields on Test Definitions accordingly: 1 Display/Evaluate Blank Accept Percentage
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 the following fields on Test Definitions accordingly: Display/Evaluate 1 Accept Quantity Blank
Sample Size UOM	Identifies the unit of measure for a sample you take to test. Examples of units of measure include barrels, gallons, hours, and cubic yards.
Numeric	Determines whether a test result value will be numeric or alphanumeric. Valid values are: 1 Indicates that the result value is numeric and should be right justified. 0 Indicates that the result value is alphanumeric and should be left justified. Tests that are using alphanumeric result values can have User Defined Code tables setup that contain alpha to numeric translations. The purpose of these tables is to supply result evaluations with a way of determining whether a result is within the range of the minimum and maximum values.

Field	Explanation
Display Decimals	Designates the number of decimals in the currency, amount, or quantity fields the system displays. For example, U.S. Dollars would be 2 decimals, Japanese Yen would be no decimals, and Cameroon Francs would be 3 decimals. . . . . . *Form-specific information* . . . . . . Determines the number of decimals in minimum and maximum values and in test results entry.
System Code	A user defined code (98/SY) that identifies a J.D. Edwards system. . . . . . *Form-specific information* . . . . . . The System Code and User Defined Code are used in combination to define test results and to associate an alphanumeric test result with a number and then evaluate the test.
User Defined Codes	A code that identifies the table that contains user defined codes. The table is also referred to as a code type. . . . . . *Form-specific information* . . . . . . The System Code and User Defined Code are used in combination to define test results and to associate an alphanumeric test result with a number and then evaluate the test.
Allowed Minimum	The lowest value for a passing test result.
Target	The preferable or target test result within the test results range. As the system does not test against a target value, this field is for your information only.
Allowed Maximum	The highest value for a passing test result.
Result Unit of Measure	A user defined code (37/UM) that identifies the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.
Preferred Minimum	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 (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.

Field	Explanation
Preferred Maximum	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 (COA) program allow you to print the preferred value on the COA. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.
Test Method	A description of how to run a quality test. The test method is useful to both your company's Quality Control department and your customers. For example, Test: Viscosity Method: RVF #4 @10RPM Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.
Property	The item attribute that is being tested.
ASTM Reference	Identifies a recommended testing procedure of the American Society of Testing Material.

Entering User Defined Codes

If you have set up alphanumeric test result values, you can set up a user defined code list (37/C1) that contains the alphanumeric results and their corresponding numeric values. The system uses this list to evaluate if an alphanumeric test result is within the range of minimum and maximum values.

For each user defined code, the second description column contains a numeric value that represents the value of the alphanumeric code. J.D. Edwards recommends that you use whole numbers rather than decimals in the Description-2 field. For example, for an alphanumeric test result of color, you might enter the following 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

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

See Also

- *Setting Up User Defined Codes* in the *OneWorld Foundation Guide* for more information on user defined codes

Entering Text for Tests

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

▶ To enter text for tests

From the Quality Management Setup menu (G3741), choose Test Revisions.

1. On Work With Test Definitions, to locate the test for which you want to enter text, complete the following fields and click Find:
   - Test ID
   - Branch/Plant
2. Choose the appropriate test and choose Attachments from the Row menu.
3. On Media Objects, choose Add from the File menu, then choose Text.
4. Type the appropriate text, and then choose Save & Exit from the file menu.

   A paper clip icon appears in the appropriate row on Work With Test Definitions. This indicates that there is an attachment to the test.

See Also

- *Media Object Attachments* in the *OneWorld Foundation Guide* for information on media objects

Reviewing Tests

After you define tests, you can review them by branch/plant and make changes 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.

See Also

- *Printing Setup Reports* for a description of the Test Definitions Report
- *Working with Approval Processing* for information on workflow processing

▶ To review tests

From the Quality Management Setup menu (G3741), choose Test Revisions.

1. On Work With Test Definitions, to locate a test, complete the following fields and click Find:
   - Test ID
   - Branch/Plant
2. Choose the appropriate test and click Select.
3. On Test Definition Revisions, review or change the test information as necessary.

Processing Options: Test Revisions (P3701)

Defaults Tab

1. Default Status Value

Use this processing option to specify which test definitions the system displays. Valid 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 Tab

1. Activate History Logging

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

Blank Do not record test definition before applying modifications.

1 Record test definition before applying modifications.

Workflow Tab

1. Activate Workflow Approval Processing

Use this processing option to specify whether to activate workflow approval processing when modifications are made to test definitions. When you activate workflow, the revised test definition must be approved before the test definition is available for use. Valid values are:

Blank Workflow approval is not activated; revised test definition is available for immediate use.

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

Setting Up Specifications

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

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

Note: You cannot customize tests within a specification. Use preferences if you need to customize tests and specifications. See *Setting Up Preferences*.

For each specification, you can define the following:

- Name and description
- Which tests to include in the specification

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

Setting up specifications consists of the following tasks:

- ❑ Defining specifications
- ❑ Entering text for specifications
- ❑ Reviewing specifications

See Also

- *Printing Setup Reports* for a description of the Specifications report

Defining Specifications

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

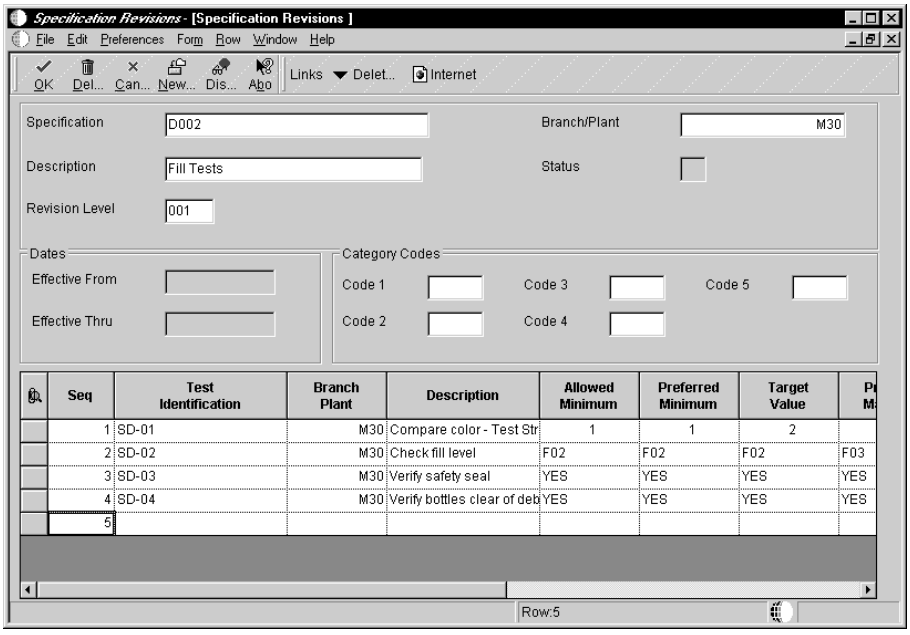
Before You Begin

- ❑ To use the approval process, set the processing option for Specification Revisions to activate workflow.
- ❑ To create historical information, set the processing option for Specification Revisions to log changes to specification definitions.

▶ To define specifications

From the Quality Management Setup menu (G3741), choose Specification Revisions.

1. On Work With Specifications, click Add.



2. On Specification Revisions, complete the following fields:
   - Specification
   - Description
3. Complete the following optional field:
   - Branch/Plant

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

4. To categorize specifications into groups, complete any of the category code fields.
5. To sequence and group the tests within a specification, complete the following fields:
   - Seq
   - Test Identification
   - Branch Plant

Field	Explanation
Seq	A number used to determine the sort order of tests and specifications within preference profiles (item/test specifications).

Entering Text for Specifications

You can enter generic text for instructions related to a specification.

▶ To enter text for specifications

From the Quality Management Setup menu (G3741), choose Specification Revisions.

1. On Work With Specifications, to locate the specification for which you want to enter text, complete the following fields and click Find:
   - Branch/Plant
   - Specification
2. Choose the appropriate specification and choose Attachments from the Row menu.
3. On Media Objects, choose Add from the File menu, then choose Text.
4. Type any additional instructions, and then choose Save & Exit from the File menu.

   A paper clip icon appears in the appropriate row on Work With Specifications. This indicates that there is an attachment to the specification.

See Also

- *Media Object Attachments* in the *OneWorld Foundation Guide* for information on media objects

Reviewing Specifications

After you define specifications, you can review them by branch/plant and make changes 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. See *Working with Approval Processing* for additional information.

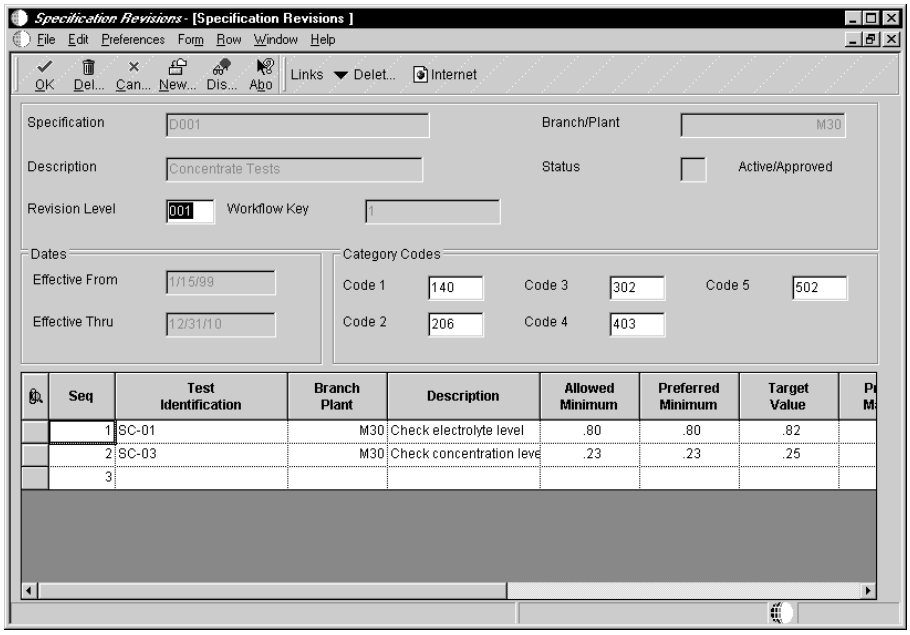
See Also

- *Printing Setup Reports* for a description of the Specifications report

▶ To review specifications

From the Quality Management Setup menu (G3741), choose Specification Revisions.

1. On Work With Specifications, to locate a specification, complete any of the following fields and click Find:
   - Specification
   - Branch/Plant
   - Description
2. Choose the appropriate specification and click Select.



3. On Specification Revisions, review or change the specification information as necessary.

Processing Options: Specification Revisions (P3702)

Defaults Tab

1. Status

Use this processing option to specify a status to filter specifications. Valid 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 Tab

1. Log History

Use this processing option to specify whether the system logs additions to, modifications of, and deletions of test definitions. When you activate workflow, any addition to, change to, or deletion of a test definition must be approved before the revision is available for use. The system logs these before images as history information, and they can be viewed online or through reports by selecting the history status (status value is 2). Valid values are:

Blank Do not perform logging.
1 Perform logging.

Workflow Tab

1. Workflow

Use this option to activate workflow approval processing. When you activate workflow, any addition to, change to, or deletion of a test definition must be approved before the revision is available for use. Valid values are:

Blank Workflow approvals are not activated; revisions are available for use immediately.
1 Workflow approvals are activated; revisions must be approved before they are available for use.

Setting Up Preference Profiles

In Quality Management, preference profiles enable you to customize tests and specifications. A specification is a group of tests that are performed at the same time. You can use a preference profile to customize tests and specifications for any combination of customer, customer group, item (product), or item (product) group. The system uses this information to control your access to Quality Management forms from other systems.

Typically, you create preference profiles when you have consistent business requirements, such as the following:

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

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

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

Setting up preferences consists of the following tasks:

- ❑ Defining preference profiles
- ❑ Entering text for preferences
- ❑ Splitting specifications

See Also

- *Printing Setup Reports* for a description of the preference report (Item Test Specification report)
- *Setting Up Preferences* in the *Sales Order Management Guide* for additional information on preference profiles

Defining Preference Profiles

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 the following:

- 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.

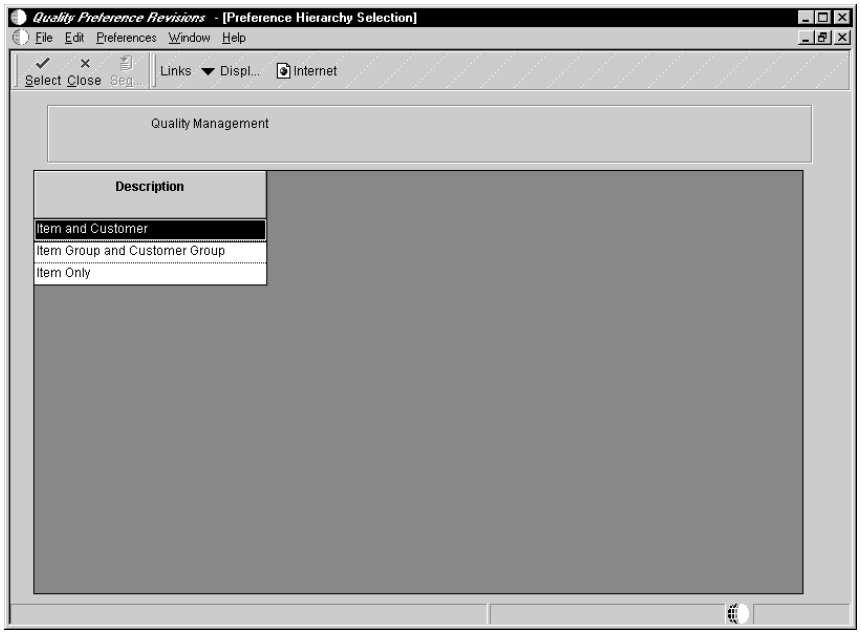
Before You Begin

- ❑ If you define tests and enter test results by customer, set up the customer information in the Address Book. See *Working with Address Book Records* in the *Address Book Guide.*
- ❑ If you define tests and enter test results by item, set up the item numbers in the Item Master and Branch/Plant tables. See *Entering Item Master Information* and *Entering Branch/Plant Information* in the *Inventory Management Guide.*
- ❑ If you define tests and enter test results by customer group or item group, set up the groups. See *Assigning Customers and Items to Groups* in the *Sales Order Management Guide.*
- ❑ Set up the hierarchy for preference profiles. See *Working with the Preference Master and Hierarchy* in the *Sales Order Management Guide.*
- ❑ To use the approval process, set the processing option for Quality Preference Revisions to activate workflow.
- ❑ To create historical information, set the processing option for Quality Preference Revisions to log changes to preference profiles.

To define preference profiles

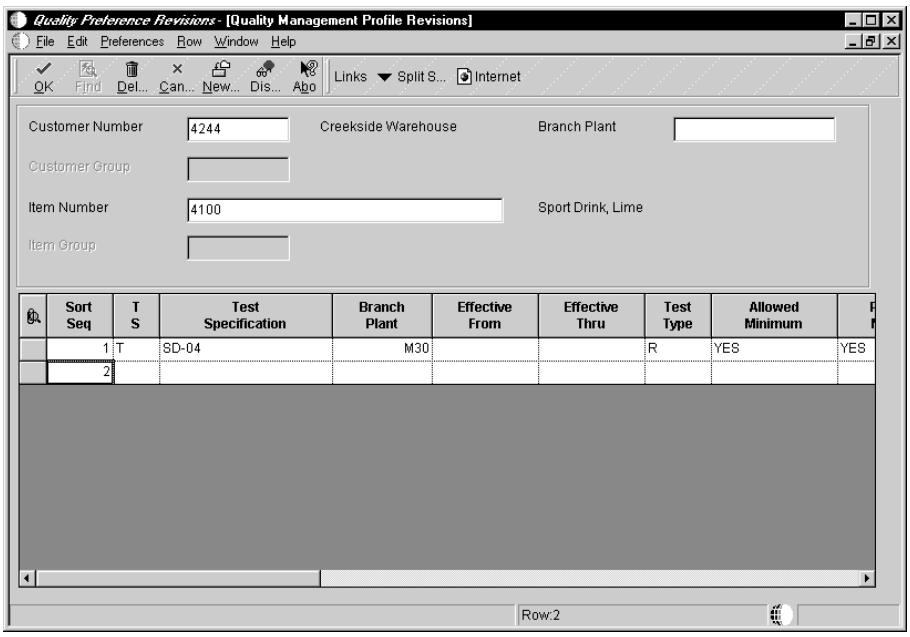
From the Quality Management Setup menu (G3741), choose Quality Preference Revisions.

1. On Work With Quality Management Profile, click Add.



2. On Preference Hierarchy Selection, choose a hierarchy and click Select.

   The hierarchy that you choose determines the fields in the header area that you complete for the preference.



3. On Quality Management Profile Revisions, complete one or all of the following fields, depending on your hierarchy:

   - Customer Number
   - Customer Group
   - Item Number
   - Item Group

4. Complete the following fields to define the tests and specifications that make up the preference:

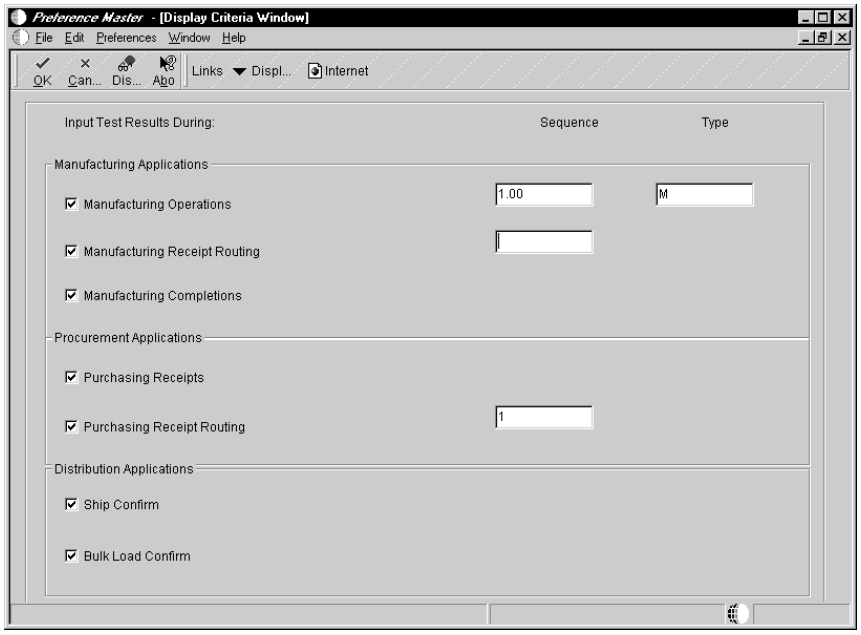
   - Sort Seq
   - T S

     If you enter a test specification value of T, you can override testing and sampling information from the original test definition by completing the appropriate fields. If you override this information, the preference displays the override values. Otherwise, the preference displays the default values.

   - Test Specification
   - Branch Plant
   - Test Type
   - Allowed Minimum
   - Preferred Minimum
   - Target Value

- Preferred Maximum
- Allowed Maximum
- Result UM
- Display Dec
- Property
- Test Method
- Number of Samples
- Sample Percent
- Accept Quantity
- Accept Percent
- Print Test

5. Choose a row that you completed and then choose Display Criteria from the Row menu.



6. On Display Criteria Window, customize the display criteria for the selected row by selecting the following options:

- Manufacturing Operations
- Manufacturing Receipt Routing
- Manufacturing Completions
- Purchasing Receipts
- Purchasing Receipt Routing

- Sequence
- Ship Confirm
- Bulk Load Confirm

If you do not want to perform quality testing for a particular program, verify that there is not a check mark in the option.

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

7. Complete the following fields located in the Sequence and Type columns to further define where a test is available for results entry, such as during a specific step in a receipt routing:
   - Sequence Number - Operations
   - Type
   - Sequence Number - Operations
   - Sequence - Bubble Sequence
8. Click OK.
9. Repeat steps 5 through 8 for each row that you entered on Quality Management Profile Revisions.

Field	Explanation
Customer Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.
Item Number	A number that the system assigns to an item. It can be in short, long, or third item number format. For process work orders, the item number is the process.
Sort Seq	A number used to determine the sort order of tests and specifications within preference profiles (item/test specifications).
T S	A code that indicates whether a record within preference profiles (item/test specifications) is a test or specification. Valid values are: T Test S Specification

Field	Explanation
Test Specification	The unique identification for a test to be performed on an item. For example: COL Color test DENS Density Test CL–2 Clarity Test
Branch Plant	A business unit is an accounting entity, such as a profit center, department, warehouse location, job, project, workcenter, and so on, required for management reporting.
Test Type	A value that specifies how the system processes tests as you enter test results. Valid values are: R Required. Result values must be within the allowable range for the test to pass. The system does not allow an item to pass quality inspection until you enter results for each required test. O Optional. Result values are optional during results entry. The system does not require the entry of a result for each optional test. However, if you enter failing results, the item fails quality inspection. G Guaranteed. Result values are optional during results entry. You can control whether Guaranteed tests appear as you enter test results with the Display Test field on Test Revisions. In addition, guaranteed tests print on the Certificate of Analysis.
Allowed Minimum	The lowest value for a passing test result.
Preferred Minimum	The lowest value for the preferred test result. This value must be greater than or equal to the allowed minimum value. Use the preferred minimum value to measure quality to a more precise specification than a customer requests. Processing options for the Certificate of Analysis program allow you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.
Target Value	The preferable or target test result within the test results range. As the system does not test against a target value, this field is for your information only.

Field	Explanation
Preferred Maximum	The highest value for the preferred test result. This value must be less than or equal to the allowed maximum value. Use the preferred maximum value to measure quality to a more precise specification than a customer requests. Processing options for the Certificate of Analysis program allow you to print the preferred value on the Certificate of Analysis report. Processing options for the Test Revisions program allow you to evaluate samples against the preferred values.
Allowed Maximum	The highest value for a passing test result.
Result UM	A user defined code (37/UM) that identifies the unit of measure for a test result. Examples of units of measure include barrels, boxes, cubic yards, gallons, and hours.
Display Dec	A value that designates the number of decimals in the currency, amount, or quantity fields the system displays. For example, U.S. Dollars would be 2 decimals, Japanese Yen would be no decimals, and Cameroon Francs would be 3 decimals.
Property	The item attribute that is being tested.
Test Method	A description of how to run a quality test. The test method is useful to both your company's Quality Control department and your customers. For example: Test: Viscosity Method: RVF #4 @10RPM Text: Run the viscosity test on a RVF viscometer with a number 4 spindle at 10 revolutions per minute.
Number of Samples	The number of samples to be taken for the test.
Sample Percent	The percentage of an order quantity that determines the number of samples to create in Test Results Revisions. For example, if the sample percentage is 50 percent and the order quantity is 10, then 5 samples will be created in Test Results Revisions. Use either this field or Number of Samples to control how many samples to create. You can use this field only with the order mode of Test Results Revisions. If the sample percentage is 100 percent, then testing is required for every unit on the order. You cannot use Accept Percentage or Accept Quantity, since all units on the order must pass for the lot to pass.

Field	Explanation
Accept Quantity	A flag that indicates the quantity of tests that must pass in order for the test sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use this accept quantity value, you must complete the following fields on Test Definitions accordingly: 1 Display/Evaluate Blank Accept Percentage
Accept Percent	A flag that indicates the percentage of tests that must pass in order for the sample to pass quality control. The system evaluates this value when the sample percentage is not equal to 100. To use the accept percentage value, you must complete the following fields on Test Definitions accordingly: 1 Display/Evaluate Blank Accept Quantity
Print Test	A code used to determine whether or not a test will be printed on the Certificate of Analysis. The valid values are: 0 The test will not be printed on the Certificate of Analysis. 1 Do not 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.
Manufacturing Operations	A value that controls whether a test will display on the Test Results Revisions form when you access test results from any of the following Manufacturing programs: • Co/By Product Completions (P31115) • Super Backflush (P31123) • Work Order Employee Time Entry (P311221) For OneWorld, valid values are: 1 The test will appear in Test Results Revisions. 0 The test will not appear in Test Results Revisions. You can use this value with the operation sequence and routing type to control the appearance of the test at an operation or routing type.

Field	Explanation
Sequence Number – Operations	A number used to indicate an order of succession. In routing instructions, a number that sequences the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation. In bills of material, a number that designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing instructions for the item. The Shop Floor Management system uses this number in the backflush/preflush by operation process. In engineering change orders, a number that sequences the assembly steps for the engineering change. For repetitive manufacturing, a number that identifies the sequence in which an item is scheduled to be produced. Skip To fields allow you to enter an operation sequence that you want to begin the display of information. You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.
Type	A user defined code (40/TR) that indicates the type of routing. You can define different types of routing instructions for different uses. For example: M Standard Manufacturing Routing RWK Rework Routing RSH Rush Routing You define the routing type on the work order header. The system then uses the specific type of routing that you define in the work order routing. Product Costing and Capacity Planning systems use only M type routings.
Manufacturing Receipt Routing	A value that controls whether a test will display on the Test Results Revisions form when you access test results from the Routing Movement and Disposition (P43250) program when the routed order is a manufacturing work order. Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions. You can use this value with the operation sequence to control the appearance of the test at a route operation.
Sequence Number – Operations	The sequence in which the system performs the operations or steps of the route.

Field	Explanation
Manufacturing Completions	A value that controls whether the test will display on the Test Results Revisions form when you access test results from either of the following Manufacturing programs: • Work Order Inventory Completions (P31114) • Completions Workbench (P3119) For OneWorld, valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.
Purchasing Receipts	A value that controls whether a test will display on the Test Results Revisions form when you access test results from either Receipts by P/O or Receipts by Item (P4312). Valid values are: 1 The test will appear in Test Results Revisions. 0 The test will not appear in Test Results Revisions.
Purchasing Receipt Routing	A value that controls whether the test will display on the Test Results Revisions form when you access test results from Routing Movement and Disposition (P43250) and the routed order is a purchase order. Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions. You can use this value with the operation sequence to control the appearance of the test at an operation.
Sequence – Bubble Sequence	A secondary bill of material sequence number that indicates the drawing bubble number.
Ship Confirm	A value that controls whether the test will display on the Test Results Revisions form when you access test results from the Ship Confirmation (P4205) program. Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.
Bulk Load Confirm	A value that controls whether the test will display on the Test Results Revisions form when you access test results from one of the following programs: • Bulk Confirm by Order or Bulk Confirm by Trip (P49510) • Packaged Load Confirmation (P49530) Valid values are: 1 The test will appear on Test Results Revisions. 0 The test will not appear on Test Results Revisions.

Entering Text for Preferences

After you define a preference, you can attach text that provides additional detail. For example, you might want to explain sample collection methods and tools.

▶ To enter text for preferences

From the Quality Management Setup menu (G3741), choose Quality Preference Revisions.

1. On Work With Quality Management Profile, complete the following fields and click Find:
   - Customer Number
   - Item Number
2. Choose the appropriate preference and click Select.
3. On Quality Management Profile Revisions, choose the appropriate test or specification and choose Attachments from the Row menu.
4. On Media Objects, choose Add from the File menu, then choose Text.
5. Type any additional instructions, and then choose Save & Exit from the File menu.

   A paper clip icon appears in the appropriate row on Quality Management Profile Revisions. This indicates that there is an attachment to the preference.

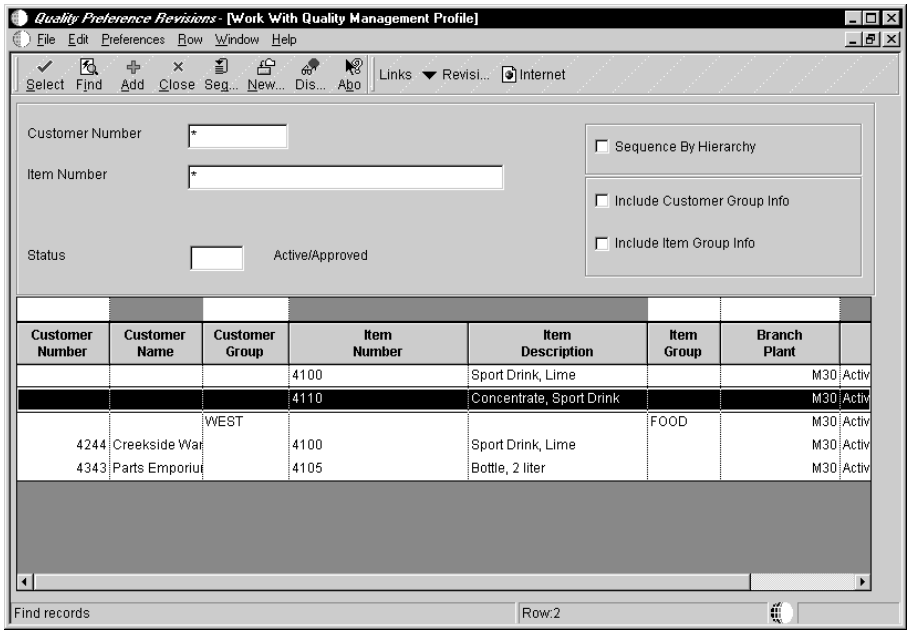
Splitting Specifications

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

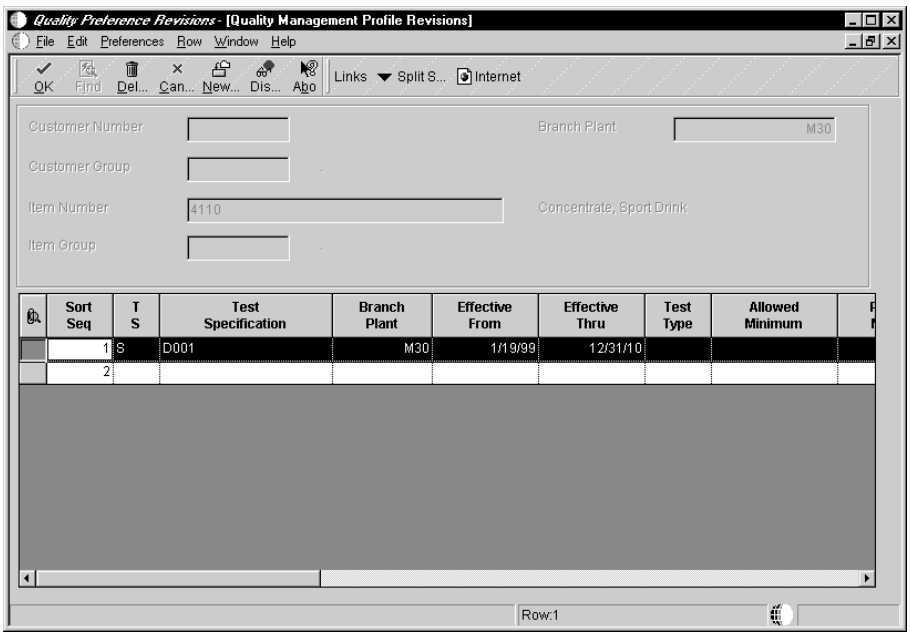
Caution: If you split a specification, you cannot re-assemble it. If you need to do this, you must delete the preference, then re-create it.

To split specifications

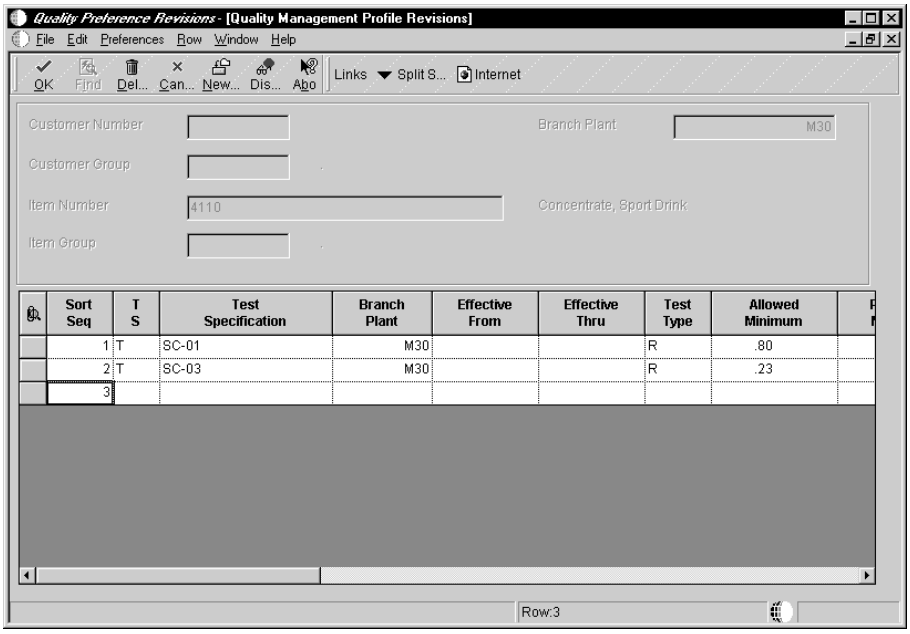
From the Quality Management Setup menu (G3741), choose Quality Preference Revisions.



1. On Work With Quality Management Profile, complete the following fields and click Find:
   - Customer Number
   - Item Number
2. Choose a specification and click Select.



3. On Quality Management Profile Revisions, choose a record and then choose Split Spec from the Row menu.



4. Review the separate tests for this specification. You can override test definition values if necessary.

Note: If you use workflow approval processing, you cannot make changes to records that have a status of pending. Also, any changes that you make do not become effective until they are approved. See *Working with Approval Processing* for additional information.

Processing Options: Preference Profile Quality Management (P40318)

Defaults Tab

1. Status

Use this processing option to specify a status value to filter quality management preferences. Valid 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 Tab

1. Log History

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

Blank Do not activate logging.
1 Activate logging.

Workflow Tab

1. Workflow Options

Use this processing option to activate workflow approval processing. When you activate workflow, any additions, changes or deletions to a quality preference must be approved before the revision is active and available for use. Valid values are:

Blank Workflow approvals are not activated; revisions are available for use immediately.
1 Workflow approvals are activated; revisions must be approved before they are available for use.

Working with Approval Processing

If you need to approve changes to tests, specifications, and preferences, you can activate workflow approval processing and then use the Approvals Workbench to route changes through an automated approval process.

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

- Test Revisions
- Specification Revisions
- Quality Preference Revisions

The Approvals Workbench 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. Designated approvers then review the changes and approve or reject 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: The current software release assigns but does not use effectivity dates for active (approved) records. Revision levels on specifications are for information only.

Working with Approval Processing consists of the following tasks:

- ❑ Revising tests, specifications, and preferences
- ❑ Approving revisions

Before You Begin

❑ Set up workflow processing. See *Creating Workflow Processes* in the *Enterprise Workflow Management Guide*.

Revising Tests, Specifications, and Preferences

You can revise tests, specifications, and preferences after they are set up. Note the following considerations:

- If you do not activate workflow processing, any changes that you make are effective immediately.
- If you activate workflow processing, changes are not effective until they have completed the workflow process. You can change only active records if no pending approvals are in progress.
- If you activate logging, the system saves history records for all changes. You do not need workflow to be activated in order to log history information.

This procedure assumes that you are using workflow processing.

Before You Begin

❑ Check the processing options for the following programs to ensure that workflow processing is activated:

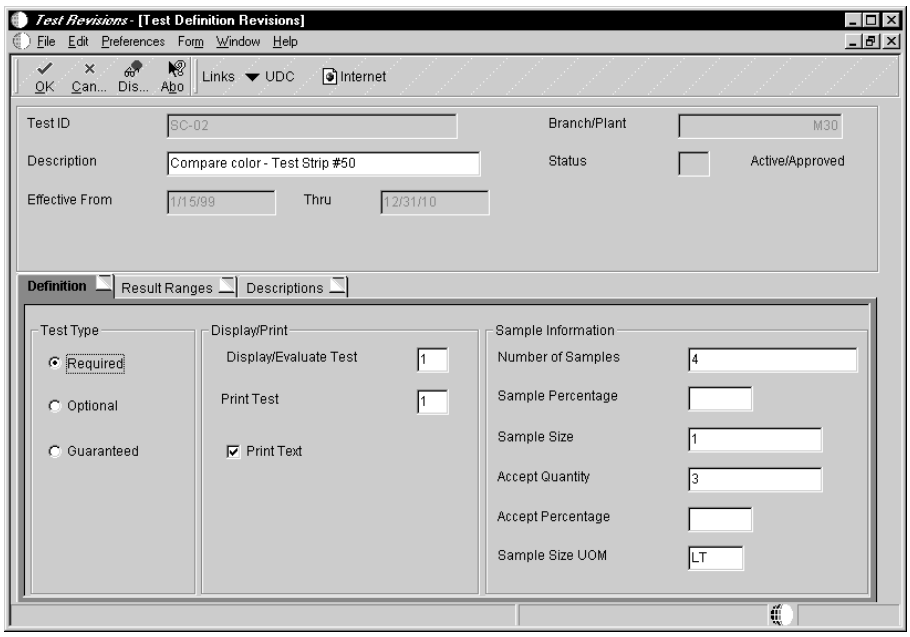
- Test Revisions (P3701). See *Setting Up Tests*.
- Specification Revisions (P3702). See *Setting Up Specifications*.
- Quality Preference Revisions (P40318). See *Setting Up Preferences*.

▶ To revise tests, specifications, or preferences

From the Quality Management Setup menu (G3741), choose Test Revisions.

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

1. On Work With Test Definitions, to locate the test that you want to revise, complete any of the following fields and click Find:
   - Test ID
   - Branch/Plant
2. Choose the appropriate test and click Select.



3. On Test Definition Revisions, revise the test information as necessary and click OK.

   With the workflow processing option active, clicking OK initiates the approval process.

Approving Revisions

After you revise a test, specification, or preference, the system sends approval messages to the members of the distribution list. The Approvals Workbench can be used to approve or reject the revisions.

On the Approvals Workbench form, you can approve or reject multiple revision requests without having to access the approval form for each request. Once approved or rejected, the revision requests no longer appear on the Approvals Workbench.

Note: You can also use the Employee Work Center in the Workflow Management to approve or reject Quality Management revisions. See *Working with Messages* in the *OneWorld Foundation Guide*.

Before You Begin

- ❑ In Workflow Management, set up distribution lists for approvers of changes to tests, specifications, and preferences.
- ❑ Use OneWorld security to assign permissions to the Approver field on the Approvals Workbench.

To approve revisions

From the Quality Management Setup menu (G3741), choose Approvals Workbench.

The steps for approving tests, specifications, and preferences are basically the same. This procedure provides the steps for approving a test revision request as an example.

1. On Quality Management Approvals Workbench, to review pending approvals, complete the following fields and click Find:
   - Approver
   - Test Approvals
2. Before you approve a test revision request, you can review additional information:
   - To view the details of a requested test revision, choose the record and then choose View Request from the Row menu.
   - To view the original test definition, choose the record and then choose View Original from the Row menu.
3. To approve a test revision, choose the appropriate test and choose Approve from the Row menu.

   The system removes the approved test revision from the list 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.

4. To reject a test revision, choose the appropriate test and choose Reject from the Row menu.

   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

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

▶ To review tests and specifications

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

1. On Test/Specification Where Used, to locate a test or specification, complete the following fields:

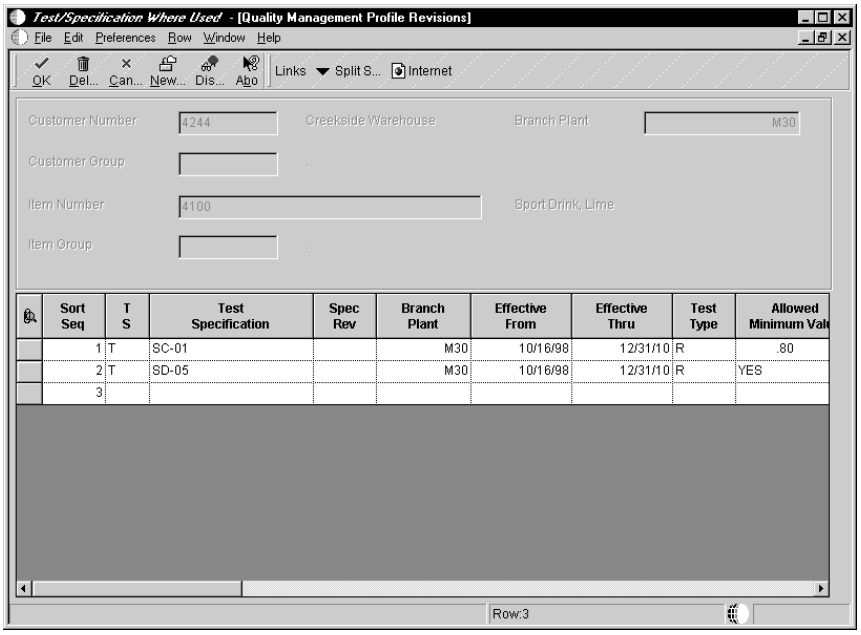
   - Branch/Plant
   - Test/Specification

   You can review a specific test or specification for all of your branch/plants by typing * in the Branch/Plant field. You can review all tests and specifications by typing * in the Test/Specification field.

2. To indicate a test or specification, click one of the following options:

   - Test
   - Specification

3. Click Find.
4. Choose the appropriate test or specification, and choose Preferences from the Row menu.



5. On Quality Management Profile Revisions, review or change the preference information.
6. If you need to make other changes, select the record that you want to change, then choose an option from the Row menu.

Field	Explanation
Test	A code that indicates whether a record within preference profiles (item/test specifications) is a test or specification. Valid values are: T Test S Specification
Specification	A code that indicates whether a record within preference profiles (item/test specifications) is a test or specification. Valid values are: T Test S Specification
Specification Revision Level	An alphanumeric character that represents the number of times a specification has changed. To avoid overlapping revisions, the system verifies that the start dates of revisions are greater than the end dates of other revisions.

Setting Up Inclusion Rules for Test Results Tracing

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

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

See Also

- *Tracing Test Results*
- *Understanding User Defined Codes* in the *OneWorld Foundation Guide*

Setting Up Customer Billing Instructions

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

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

Before You Begin

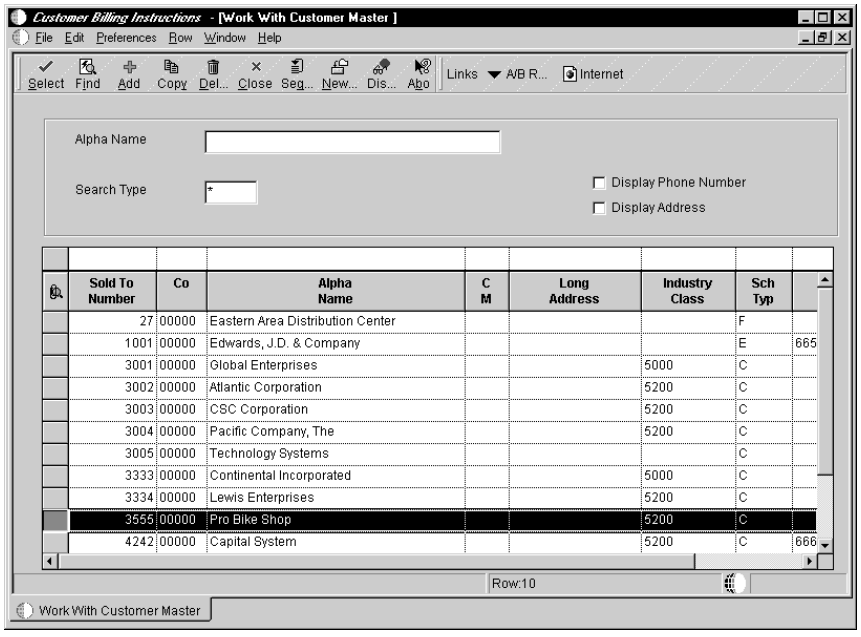
- ❑ Ensure that you have set up tests with the appropriate Print Test values to control which tests print on the Certificate of Analysis. See *Defining Tests.*

See Also

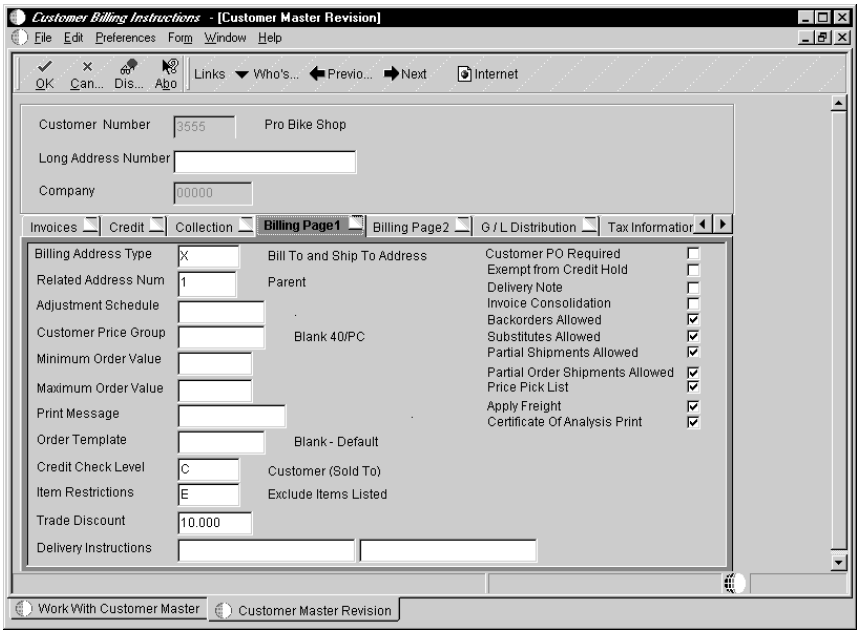
- *Printing Test Results Reports* for a description of the Certificate of Analysis

▶ To set up customer billing instructions

From the Customer Revisions menu (G4221) in Sales Order Management, choose Customer Billing Instructions.



1. On Work With Customer Master, to locate a specific customer, complete the following fields and click Find:
   - Alpha Name
   - Search Type
2. Choose the appropriate customer and click Select.



3. On Customer Master Revision, click the Billing Page 1 tab and then click the following option:
   - Certificate Of Analysis Print

Field	Explanation
Search Type	A user defined code (01/ST) that identifies the kind of address book record that you want the system to select when you search for a name or message. Examples include the following: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists T Tax authority

Field	Explanation
Certificate Of Analysis Print	This code indicates that the system should print a Certificate of Analysis for the customer. The valid values are: Y Allows the printing of the Certificate of Analysis. N Prevents printing a Certificate of Analysis for a specific customer when a Certificate of Analysis report is run for a group of customers. Note: This feature is only activated when the Quality Management System is in use and the Certificate of Analysis is created.

Test Results Processing

Test Results Processing

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

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

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

The following programs access Quality Management information:

Shop Floor Management	• Work Order Entry • Work Order Completions • Super Backflush • Work Order Employee Time Entry
Procurement	• Receipts by P/O Item/Account • Routing Movement/Status
Distribution	• Ship Confirmation

See Also

- *Defining Preference Profiles*

Test results processing consists of the following tasks:

- ❑ Working with test results
- ❑ Reviewing test results

Working with Test Results

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

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

Working with test results consists of the following tasks:

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

The topics that follow explain the terminology used with test results, the sample numbering system, and how you can use test results with various programs.

Terminology

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

- Test entry format
- Lot status

You can enter test results in preference format or order number format. The format depends on how you set the Results Entry Format processing option for Enter Test Results. The system uses header information to select tests and samples through preference profiles. The test entry formats organize test results as follows:

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

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

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

For information on searching for tested lots for sales orders, see *Additional Order Processing During Shipment Confirmation* in the *Sales Order Management Guide*.

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

If you set processing options for failed and passed lot status, the system prevents the lots from being sold or shipped until the testing is finished and the lots pass inspection.

A value can be set to a processing option to hold the lot as soon as it is brought into inventory, whether it passed quality testing or has not yet been tested. You might use a status of Q for awaiting quality testing. This prevents the lot from being chosen by Sales Order Entry or Ship Confirm. After the lot has been inspected, if the lot fails, you might change the status to F for failed inspection. If

the lot passes inspection, you might change the status to blank to indicate that it is available.

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

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

- Alphanumeric (Numeric check box on Test Definition Revisions = Blank)
- Not set up with a user defined code list

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

Sample Numbering

The Quality Management system provides a unique numbering system for samples when you enter test results. To track test results to a specific sample, you can enable 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 perform a re-test, 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 perform a re-test on the original sample, you can assign a duplicate sample number for the test.

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

For the current release, sample numbers are numeric only.

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 Test Results Revisions from the following programs:

- Work Order Inventory Completions

- Work Order Hours and Quantities Entry
- Rate Schedule Workbench
- Sales Order Ship Confirm
- Purchase Order Receipts
- Move and Disposition

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

Work Order Entry	When you create a work order, you can: • Use Preference Profiles to maintain tests for the parent item • Enter generic text to indicate when to test materials and which test to use
Work Order Completions	When you enter work order completions, including quantity completed and quantity scrapped, you can: • Access the Test Results Entry form for any items requiring testing upon completion • Review work order generic text • Set processing options for default lot, work order, and operation status
Super Backflush	When you backflush labor and material for a work order, you can: • Access the Test Results Entry form for any items that require testing • Review generic text for the parent item and operations
Hours and Quantities	When you charge actual hours and quantities to a work order, you can: • Access the Test Results Entry form for completed items that require testing • Review generic text for the parent item • Set processing options for work order status and operation status
Bill Revisions	When you maintain bills of material, you can: • Enter generic text to indicate the various tests to perform on an item • Use Preference Profiles to maintain tests for the parent item

Receipts by PO/Item/Account	When you receive items, you can access the Test Results Entry form for items that require testing.
Routing Receipts	When you review the location of goods within the receipts routing process and move them to another operation, you can access the Test Results Entry form for items that require testing.
Sales Orders	When you enter sales orders, you can use the Item Search to select the lot that meets the quality criteria for the customer and item on the sales order.

Selecting Tests for Results Entry

You can enter test results for an item and lot from the Quality Management system menu or from many programs within the Manufacturing and Distribution systems. If you access the Test Results Revisions form from another Manufacturing or Distribution program, the system completes the test header information. The system uses the header information to select the correct set of tests for results entry.

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

Selecting tests for results entry consists of the following tasks:

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

Before You Begin

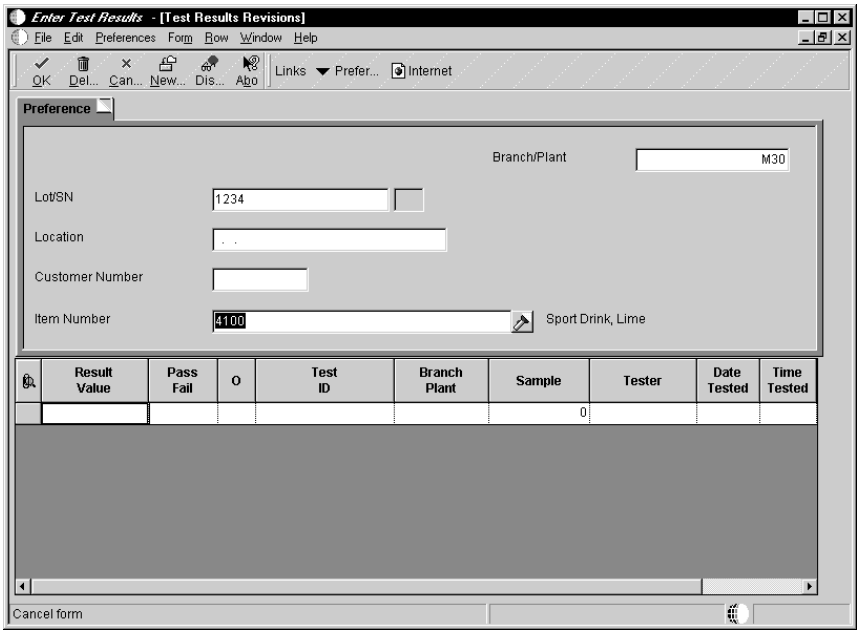
❑ Set the following processing options for Enter Test Results (P3711):

- Results Entry Format, to determine preference or order number format
- Status for a Failed Lot, to determine the lot status for failed lots
- Status for a Passing Lot, to determine the lot status for passing lots
- Activate System Sample Numbering, to activate system-assigned sample numbers (optional)

To select tests in preference format

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

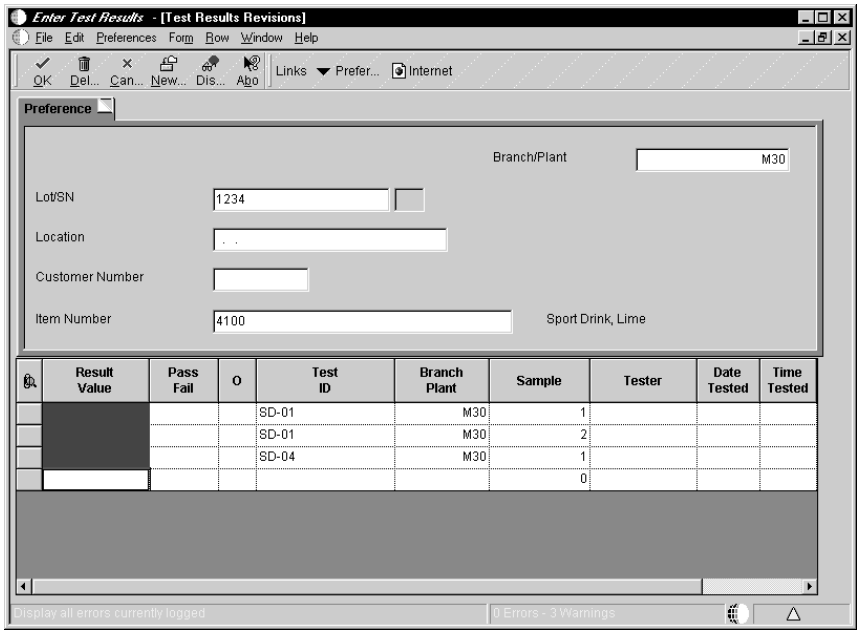
1. On Work With Test Results, click Add.



2. On Test Results Revisions, complete the following fields:
   - Branch/Plant
   - Lot/SN
   - Item Number

     If you set Allow Duplicate Lots to 2 in System Constants, the Item Number field is required. See *Setting Up Constants* in *Inventory Management.*

3. Complete the following optional fields:
   - Location
   - Customer Number
4. Choose Preference from the Form menu.



5. Click the Preference tab and enter the results for each test.

   See *Entering Test Results*.

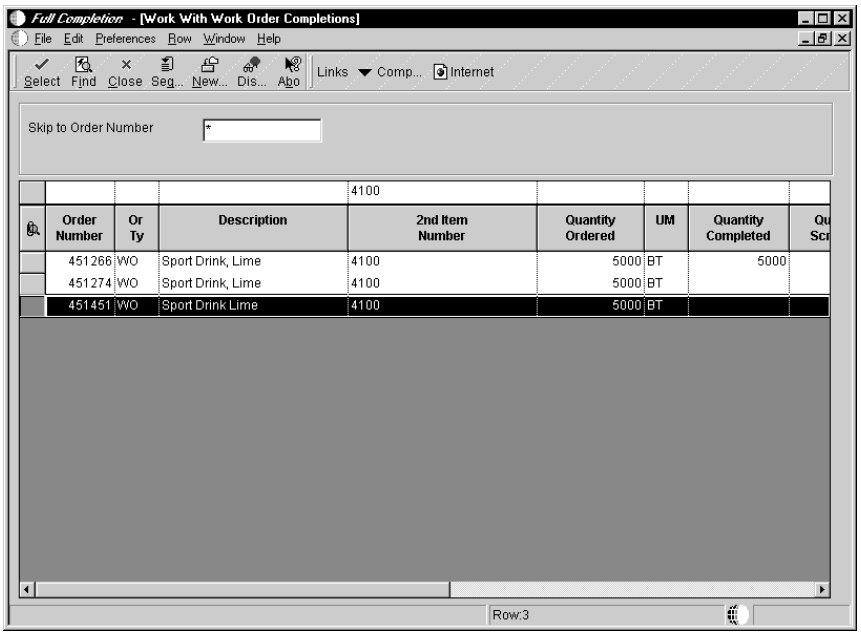
Field	Explanation
Branch/Plant	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.
Lot/SN	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.
Item Number	A number that the system assigns to an item. It can be in short, long, or third item number format. For process work orders, the item number is the process.
Location	The storage location from which goods will be moved.

Field	Explanation
Customer Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.

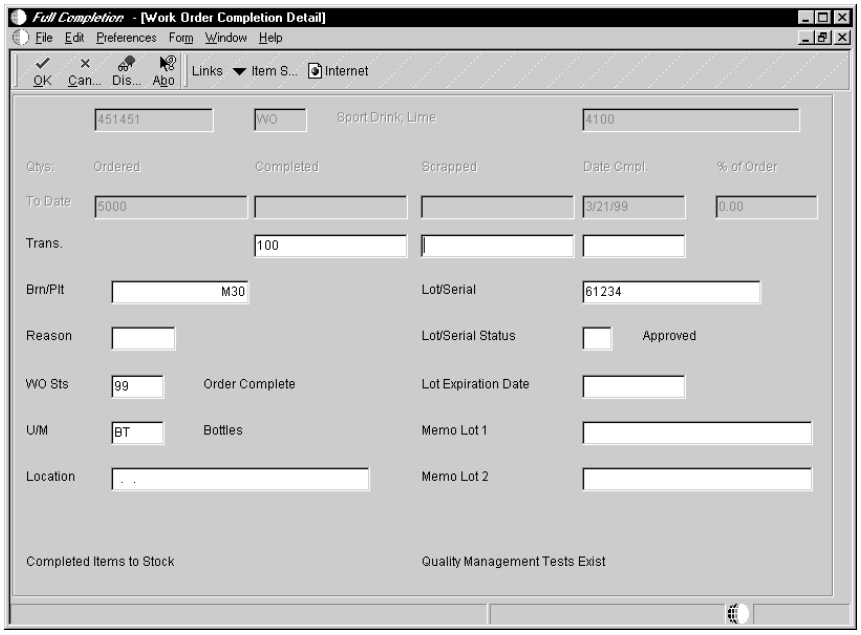
▶ To select tests in order number format

From the Daily Order Reporting - Discrete menu (G3112), choose Full Completion.

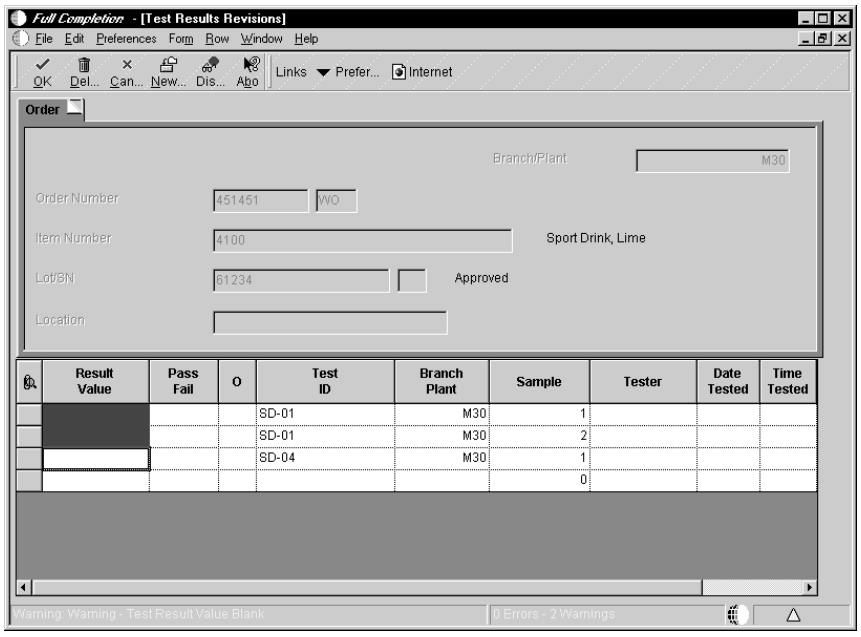
For example purposes, this procedure uses a work order completion in Shop Floor Management.



1. On Work With Work Order Completions, enter the item number in the following field, and click Find:
   - 2nd Item Number
2. Choose the work order for which you want to enter results and choose Completion from the Row menu.



3. On Work Order Completion Detail, complete the following fields:
   - Trans
   - Lot/Serial
4. Choose Test Results from the Form menu.



5. On Test Results Revisions, click the Order tab and enter the results for each test.

   See *Entering Test Results*.

Field	Explanation
2nd Item Number	A number that identifies the item. The system provides three separate item numbers plus an extensive cross-reference capability to alternate item numbers. These item numbers are: 1. Item Number (short) – An 8-digit, computer-assigned item number. 2. 2nd Item Number – The 25-digit, free–form, user defined, alphanumeric item number. 3. 3rd Item Number – Another 25-digit, free–form, user defined, alphanumeric item number. In addition to these three basic item numbers, the system provides an extensive cross-reference search capability. Numerous cross-references to alternate part numbers can be user defined (for example, substitute item numbers, replacements, bar codes, customer numbers, or supplier numbers).
Trans	The number of units committed for shipment in Sales Order Entry, using either the entered or the primary unit of measure defined for this item. In the Manufacturing system and Work Order Time Entry, this field can indicate completed or scrapped quantities. The quantity type is determined by the type code entered.
Lot/Serial	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.

Entering Test Results

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

As you enter test results, the system processes them to determine if the results that you collected pass the tests that you defined. The system compares the test results against minimum and maximum values, and sets the value in the Pass/Fail field accordingly for each test, based on the Display/Evaluate Test value that you defined for the test.

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

The following are Display/Evaluate Test values:

1 - All samples	All samples must pass, unless you have defined an Accept Quantity or Accept Percentage that is less than the total number of samples. If the Accept Quantity and Accept Percentage fields are blank, the system assumes all samples of the test must pass in order for the test to pass. You can only use the optional Accept Quantity and Accept Percentage fields if Display/Evaluate equals All.
2 - Average of all samples	The system adds all sample results for the test and determines an average. The average value must be within the minimum and maximum values defined for the test. Otherwise, the entire test fails.
3 - Last occurrence	The system retrieves the last sample that you entered for the test and determines if that sample passed. If so, the entire test passes.

The evaluation process uses the Acceptable Quantity on Test Definitions as the number of samples that must pass within a test. For example, you have four samples of the color test and you set Acceptable Quantity at a value of 2. In this case, only two color samples must pass, in order for color to pass quality inspection for a test.

The evaluation process uses Acceptable Percentage on Test Definitions as the percentage of samples that must pass within a test. For example, you have 10 samples of the color test, and you set Acceptable Percentage at a value of 50 percent. In this case, only five color samples must pass, in order for color to pass quality inspection for a test.

If all the tests within a lot have a passing value, the system sets the lot status to the value that you defined in the processing option for a passed status.

If any test within a lot fails (based on all samples, average, or last occurrence), the system sets the lot status to the value that you defined in the processing option for a failed status. All failed test results appear highlighted on screens that show test results, including Test Results Revisions and all inquiry screens.

You can override the Pass/Fail value to force the lot to pass. You should secure this function so that all users can review the status, but only users with proper authority can change the status. See *Overriding Test Status.*

Related Tasks

Evaluating tests during Bulk Load Confirm	The test type on Test Definitions determines whether you enter test results during Bulk Load Confirm. If a test is required, the Bulk Confirm process stops until you enter passing test results. If a test is optional, a warning message appears, but you can complete the Bulk Confirm process. If a test is guaranteed, you can complete the Bulk Confirm process and no warning message appears.
Creating non-conforming records	When you enter test results, you can also write failed tests to the Nonconforming Product table (F3703). Use the Nonconforming Product program to view these records.

▶ To enter test results

See *Selecting Tests for Results Entry* for the first part of this two-part process.

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

1. On Test Results Revisions, after you have entered test header information in the appropriate format, complete the following field with test result information:
   - Result Value
2. If you did not set the processing option for system-assigned sample numbers, enter a sample number for the test result in the following field:
   - Sample
3. Complete the following optional fields:
   - Tester
   - Date Tested
   - Time Tested

   You can override the date and time defaults.
4. Repeat steps 1 through 3 for each test result.

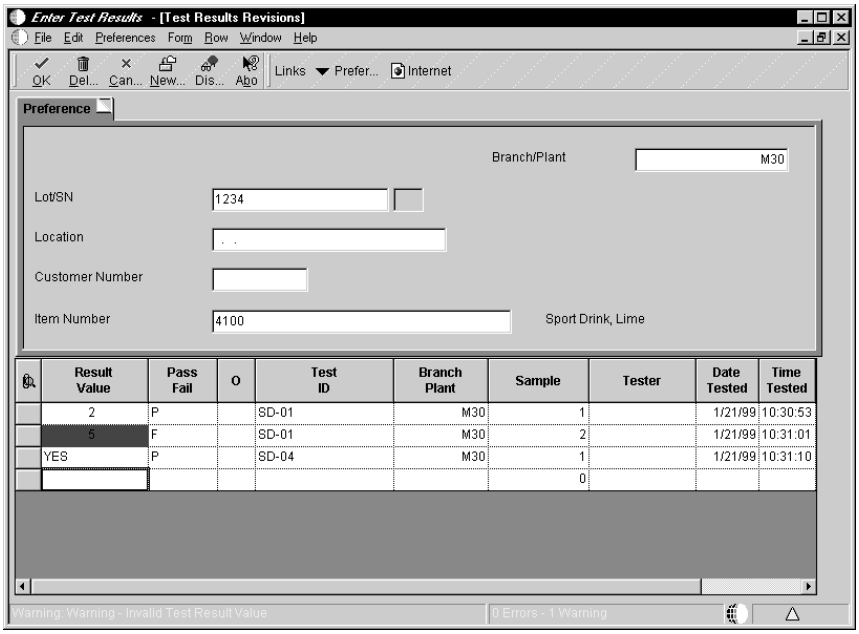
   The Result Value field appears highlighted until you enter a result, or if the test failed. You are not required to enter all results at the same time. However, until you enter test results for all samples of a required test, testing is incomplete and the lot will fail.

If you need to enter new tests, you can do so at any time on the blank lines.

5. After you have entered all test results, click OK.

   If there are warning messages due to failed or empty test results, click OK repeatedly until all messages are cleared.

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



6. Verify the test results for the lot that you just entered.

   If you need to revise any test results, choose the appropriate row and click Select.

Field	Explanation
Result Value	The result of the performed test.
Sample	A number assigned to a group of tests within the same sample.
Tester	The address book number of the person who originated the change request. The system verifies this number against the Address Book.
Date Tested	The date on which the test was performed.
Time tested	The time at which the test was performed.

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

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 turn on the Print Text option in your test definition setup, this text prints on the Certificate of Analysis.

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

This task uses the Preference format as an example.

See Also

- *Setting Up Tests*

▶ To enter text for test results

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

1. On Work With Test Results, to locate an item for which you have entered test results, complete any of the following fields and click Find:
    - Branch/Plant
    - Order Number
    - Or Ty
    - Item Number
    - Customer Number
    - Lot/SN
    - Location

2. Choose the appropriate test and click Select.
3. On Test Results Revisions, choose the record for which you want to enter informative text and choose Attachments from the Row menu.
4. On Media Objects, choose Add from the File menu, then choose Text.
5. Type the information and then choose Save & Exit from the File menu.

   A paper clip icon appears in the appropriate row on Test Results Revisions. This indicates that there is an attachment to the test result.

See Also

- *Media Object Attachments* in the *OneWorld Foundation Guide* for information on media objects

Overriding Test Status

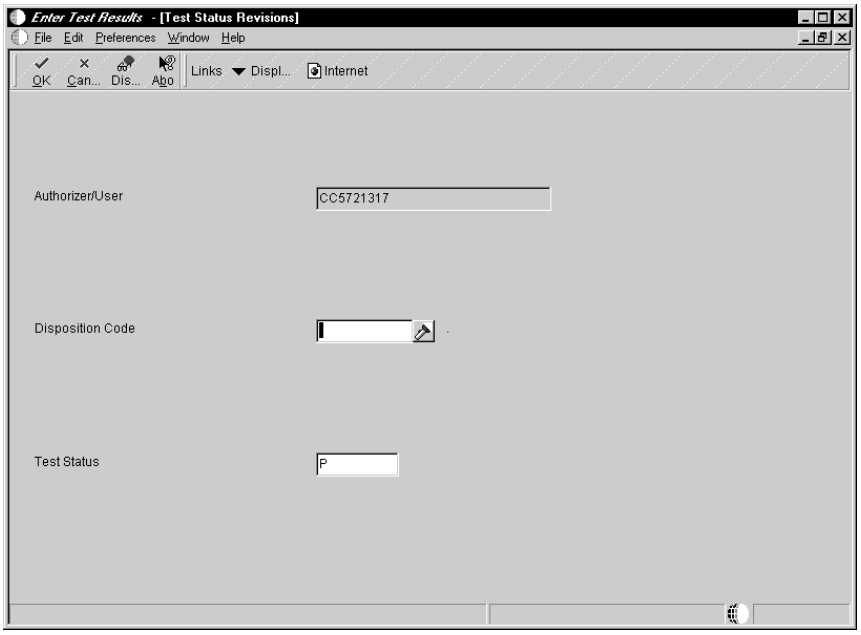
After you enter test results, you can override the pass or fail value of each individual test, if necessary. For example, you might need to override a failing value to force the lot to pass.

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

▶ To override test status

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

1. On Work With Test Results, to locate an item for which you have entered test results, complete any of the following fields and click Find:
   - Branch/Plant
   - Order Number
   - Or Ty
   - Item Number
   - Customer Number
   - Lot/SN
   - Location
2. Choose the appropriate set of tests and click Select.
3. On Test Results Revisions, choose the record for which you want to override the test status, and choose Override Status from the Row menu.



4. On Test Status Revisions, complete the following fields and click OK:
   - Disposition Code
   - Test Status
5. On Test Results Revisions, choose Attachments from the Row menu.
6. On Media Objects, type a memo describing why you changed the status of the test, and then choose Save & Exit from the File menu.

   The system updates the Override code on Test Results Revisions.

Field	Explanation
Disposition Code	A user defined code (system 37/type DS) that explains the purpose of the test status change. For example, you can indicate the reason you are passing the failed test, such as the item will go through re-work or will be scrapped.
Test Status	The value which identifies whether the test passed (P) or failed (F).
O	The flag which designates whether a test has been overridden. Valid values are: 1 overridden 0 not overridden

Creating New Samples

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

Creating new samples consists of the following tasks:

- Overriding the number of samples for first-time tests
- Creating additional samples for re-testing

Overriding the Number of Samples for First-Time Tests

You can override the number of samples defined for each test in Preference Profiles and Test Revisions. To do so, you must set the processing option to display the Number of Samples field.

Note: You can only use this feature when you are entering test results for the first time for a specific item or lot. If you are entering additional test results, use the New Sample option. See *Creating Additional Samples for Re-testing*.

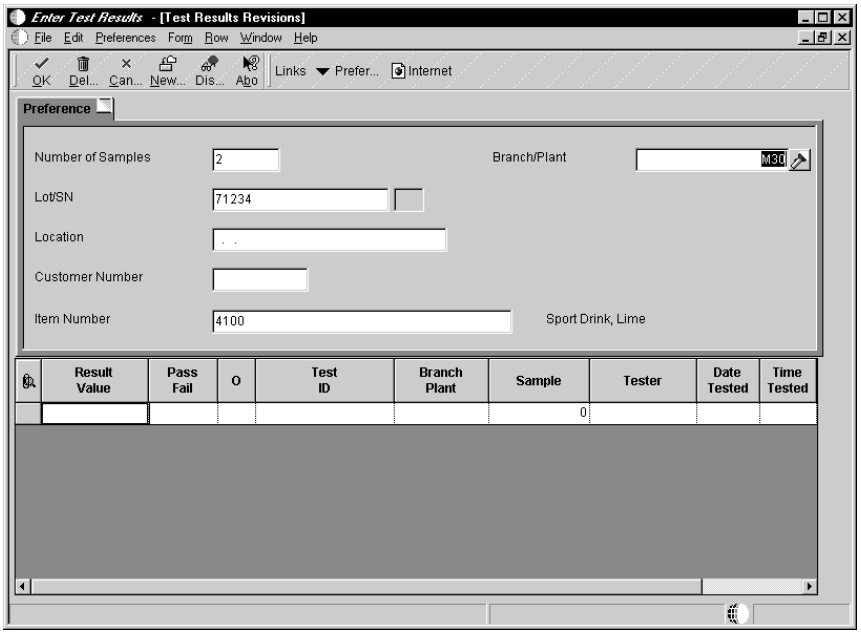
Before You Begin

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

▶ To override the number of samples for first-time tests

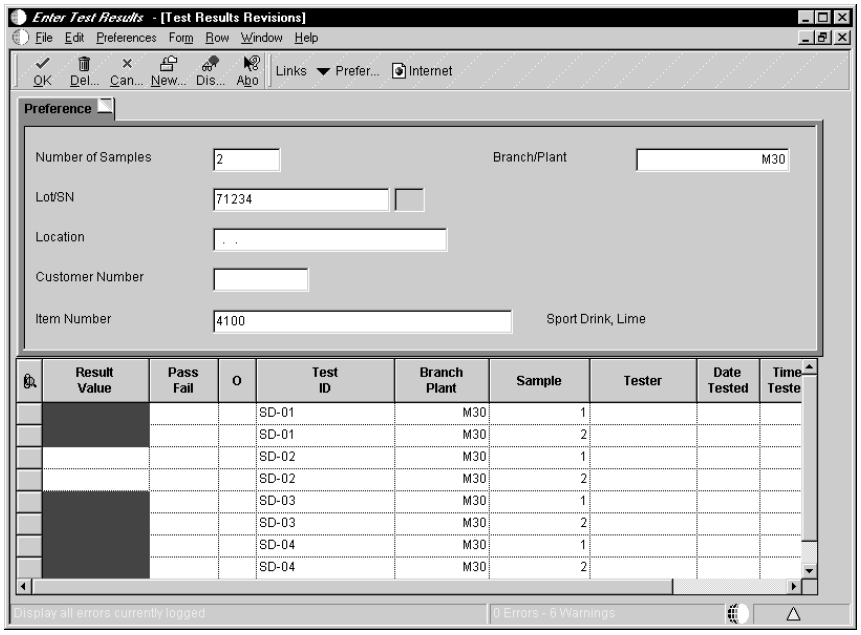
From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

1. On Work With Test Results, click Add.



2. On Test Results Revisions, complete the following fields:
   - Branch/Plant
   - Lot/SN
   - Item Number
3. Enter the number of samples that you need in the following field:
   - Number of Samples
4. Complete the following optional fields:
   - Location
   - Customer Number
5. Choose Preference from the Form menu.

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



6. If there are samples that you do not need, choose those samples and click Delete.

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

Creating Additional Samples for Re-Testing

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

The New Sample option creates one new sample for each test within the Preference.

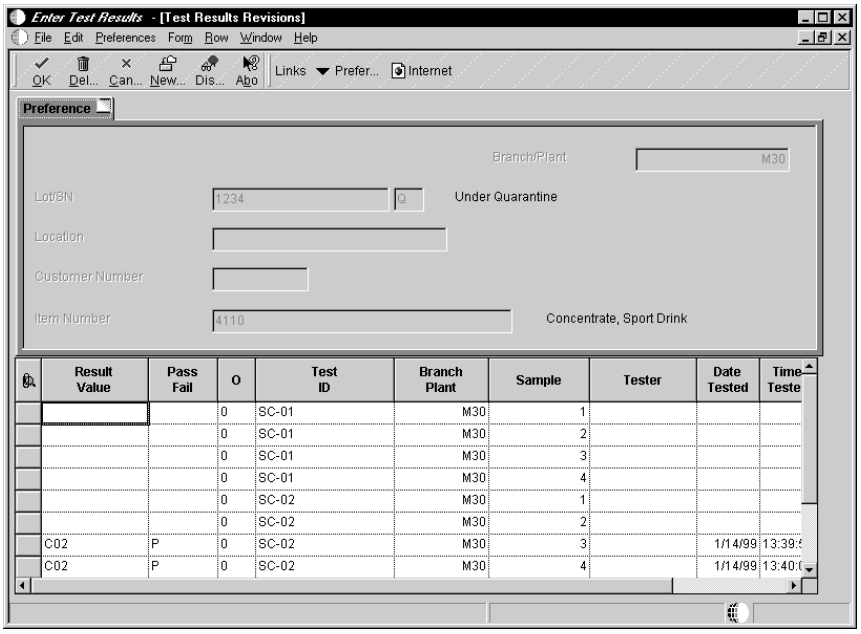
▶ To create additional samples for re-testing

From the Quality Management Daily Operations menu (G37), choose Enter Test Results.

1. On Work With Test Results, to locate an item for which you have entered test results, complete any of the following fields and click Find:
   - Branch/Plant
   - Order Number
   - Or Ty

- Item Number
- Customer Number
- Lot/SN
- Location

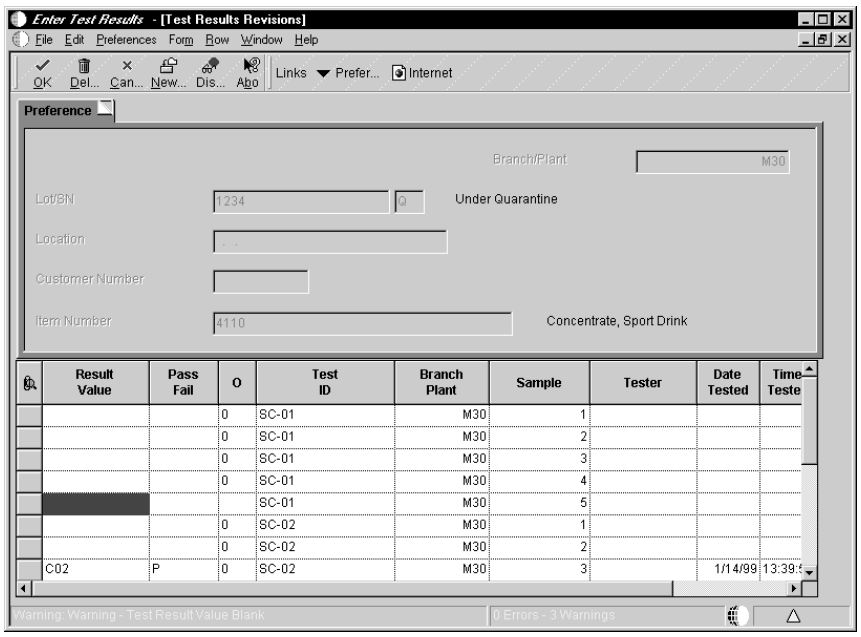
2. Choose the appropriate set of test results and click Select.



3. On Test Results Revisions, choose New Sample from the Form menu.

   The system creates one new sample for *each* test.

   You can also use the Copy Test option on the Row menu to create one new sample for *one* test.



4. If you need additional new samples, repeat steps 2 and 3.
5. If you do not need to enter test results for a particular new sample, choose that sample and click Delete.

Processing Options: Enter Test Results (Test Results Revisions)

Test Results Tab

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

1. Results Entry Format

Use this processing option to specify the format for entering test results. Valid values are:

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.
Blank Use the Preference format.

2. Default Tester

Use this processing option to specify the default address book number for the tester.

If you leave this processing option blank, there is no default tester and you must enter the tester's address book number manually for each test.

3. Minimum and Maximum Parameters

Use this processing option to specify the range of acceptable values to measure quality. Valid values are:

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.

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

4. Number of Samples

Use this processing option to display the Number of Samples field. Valid values are:

1 Display the Number of Samples field for input. Choose this option if you want to override the number of samples set up in Preference Profiles or in the Test Definition Master.

Blank Do not display the Number of Samples field. If you leave this processing option blank, the system uses the number of samples set up in Preference Profiles or in the Test Definition Master. The Number of Samples field does not appear on Test Results Revisions (P3711).

5. Copy Generic Text

Use this processing option to specify whether the system copies information or instructions from tests or preferences to the test results. Valid values are:

1 Copy generic text from Test Revisions (P3701). When you set up tests, you can use generic text to add information or instructions related to a specific test, such as sampling methods to be used. This option allows you see the instructions on your test results.

2 Copy generic text from Preference Profiles (P40300). When you set up preferences, you can use generic text to add information or instructions related to a specific test within a preference, such as sampling methods to be used for customized tests for an item. This option allows you to see the instructions on your test results.

Blank Do not copy generic text.

6. Test Results Search

Use this processing option to specify that the system search for a duplicate lot number before creating new test results. If the processing option is left blank,

the system uses the Preference Profiles to create new test results. This option is used when accessing the Quality Management menu and the Quality Management application from other applications. Valid values are:

Blank Do not search for existing test results by lot number. Use Preference Profiles to create a new set of tests for an existing document number.
1 Search for existing test results by lot number. To prevent duplicate testing, you can set this processing option to search for test results by lot number first rather than by the document number. If no results are found, you can create new test results for the lot number and document number.

7. Record Nonconforming Product

Use this processing option to specify whether the system records items that have not passed quality testing. Valid values are:

1 Record failed tests to the Nonconforming Product table (F3703). In order to record failed tests, set this option to 1. When a single test fails, the system assigns a defect number and records the failure to the Nonconforming Product file. You can then review all failed lots and assign corrective actions.
Blank Do not record failed tests.

8. Activate System Sample Numbering

Use this processing option to specify whether the system records items that have not passed quality testing. Valid values are:

1 Record failed tests to the Nonconforming Product table (F3703). In order to record failed tests, set this option to 1. When a single test fails, the system assigns a defect number and records the failure to the Nonconforming Product file. You can then review all failed lots and assign corrective actions.
Blank Do not record failed tests.

Security Tab

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

1. Protect Date and Time

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

1 Protect date and time of test.
Blank Do not protect date and time of test.

2. Protect Tester's ID

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

1 Protect tester's address book number.
Blank Do not protect tester's address book number.

Lot Status Tab

These processing options control lot availability and lot status update.

1. Status for a Failed Lot

Use this processing option to specify the status code used for failed lots. For example, a value of F. Lots with this status code cannot be shipped or sold.

If you leave this processing option blank, the system allows lots that have failed quality testing to be shipped or sold.

2. Status for a Passing Lot

Use this processing option to specify that a passing lot not be shipped or sold. For example, use a value of H. Only enter a code other than a blank if you want to hold passing lots, so that they are not available to be sold or shipped. You might use this option if you need additional approvals before selling or shipping lots that have passed quality testing.

If you leave this processing option blank, the system allows lots that have passed quality testing to be shipped or sold.

3. Lot Status Update

Use this processing option to control how the system updates the status of lots. Valid values are:

Blank Only update the status of the lot master.
1 Update the status for all lot locations. This value allows you to update the status of a lot throughout the inventory at all locations.
2 Display the Location Lot Status Change window to update status. This value allows you to update specific lot locations rather than all lot locations.

Leave this processing option blank if you need additional testing or approvals before updating lot status records in your inventory.

Versions Tab

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

1. Certificate of Analysis (R37900)

Use this processing option to specify which version of the Certificate of Analysis to print. The Certificate of Analysis lists the tests and the results for lots sold to a customer.

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

2. Product Test Report (R37901)

Use this processing option to specify the version of the Product Test Report to print. This report is intended for internal use to review test results for a work order, purchase order, or lot number.

If this processing option is blank, the program uses the ZJDE0001 version.

3. Trace Test Results (P37201)

Use this processing option to specify the version of Trace Test Results to review. This form allows you to locate test results for an assembled item and its components, or for an item that has been reclassified.

If this processing option is blank, the program uses the ZJDE0001 version.

Working with External Test Results

From the Quality Management Daily Operations menu (G37), choose Batch Test Results.

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

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

Reviewing Test Results

The test results contain important information that can help you closely monitor product quality. You can review test results to help you do the following:

- 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

Reviewing test results consists of the following tasks:

- ❑ Reviewing test results
- ❑ Reviewing test results by lot number
- ❑ Locating test results by item number and test ID
- ❑ Tracing test results
- ❑ Managing failed lots
- ❑ Reviewing tested lots by preference profile

See Also

- *Printing Test Results Reports* for descriptions of the Product Test Report and the Test Results Worksheet
- *Additional Order Processing During Ship Confirm* in the *Sales Order Management Guide* for information on searching for tested lots for sales orders

Reviewing Test Results by Lot Number

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

The manner in which the Test Results Inquiry program displays information depends on how you access it, as follows:

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

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

When you enter a sales order, you can do the following:

- Use Test ID and test ranges to filter for items that meet your customer's requirements on Selection Criteria
- Locate items based on the Allowed Minimum or Allowed Maximum fields
- Determine if the lots that you review on Item Search meet the customer or manufacturing specifications
- Add lots to the sales order that meet your customer's requirements
- Access Test Results Inquiry from Item Search to view test results for an item, lot, and customer so that you can determine whether the lot meets customer specifications

▶ To review test results by lot number

From the Lot Control menu (G4113) in Inventory Management, choose Lot Availability.

Alternatively, you can choose Lot Master Revisions.

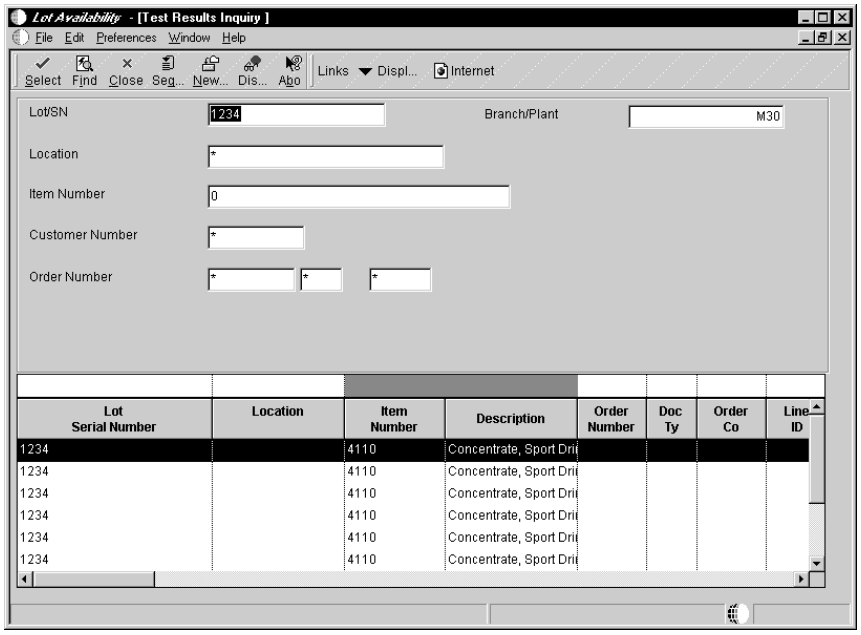
1. On Work With Lot Availability, to locate an item for which you have entered test results, complete any of the following fields and click Find:
   - Branch/Plant
   - Lot/Serial

- Item Number

2. To determine if a lot has passed quality inspection, review the following field:

   - Lot Status

3. Choose a test and choose Test Results from the Row menu.



4. On Test Results Inquiry, review the following field to determine if a test was overridden:

   - Test Ovrr

Field	Explanation
Lot Status	A user defined code (41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold. You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.
Test Ovrr	The flag which designates whether a test has been overridden. Valid values are: 1 overridden 0 not overridden

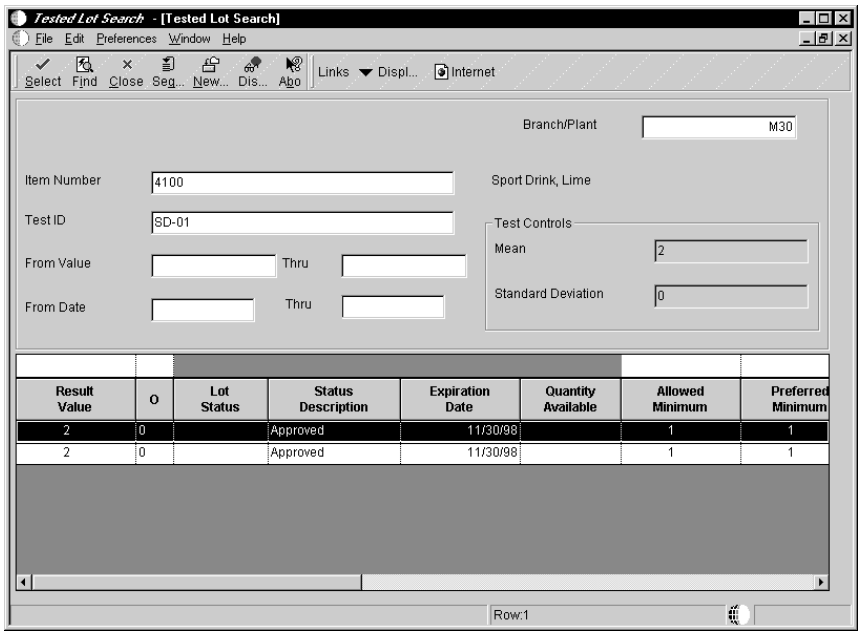
Locating Test Results by Item Number and Test ID

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

▶ To locate test results by item number and test ID

From the Quality Management Daily Operations menu (G37), choose Tested Lot Search.

Alternatively, you can choose Test Results Inquiry.



1. On Tested Lot Search, to locate a specific item and lot, complete the following fields and click Find:
   - Branch/Plant
   - Item Number
   - Test ID
   - From Value
   - Thru

   If you leave the From Value and Thru fields blank, the system displays all test results.

2. Review the following fields:
   - Result Value

- O
- Lot Status
- Expiration Date
- Quantity Available

Field	Explanation
Result Value	The result of the performed test.
O	The flag which designates whether a test has been overridden. Valid values are: 1 overridden 0 not overridden
Lot Status	A user defined code (table 41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold. You can assign a different status code to each location in which a lot resides on Item/Location Information or Location Lot Status Change.
Expiration Date	The date on which a lot of items expires. The system automatically enters this date if you have specified the shelf life days for the item on Item Master Information or Item Branch/Plant Information. The system calculates the expiration date by adding the number of shelf life days to the date that you receive the item. You can commit inventory based on the lot expiration date for items. You choose how the system commits inventory for an item on Item Master Information or Item Branch/Plant Information.
Quantity Available	The quantity available can be the on-hand balance minus commitments, reservations, and backorders. Availability is user defined and can be set up in branch/plant constants.

Tracing Test Results

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

See Also

- *Setting Up Inclusion Rules for Test Results Tracing*

▶ To trace test results

From the Quality Management Daily Operations menu (G37), choose Trace Test Results.

1. On Work With Trace Test Results, to review lots associated at lower levels, choose Multi Level from the View menu.
2. To locate a specific item and lot, complete the following fields and click Find:
   - Branch/Plant
   - Lot/SN
   - Item Number
3. Review the following fields:
   - Test ID
   - Description
   - Result Value
   - Pass Fail
   - Date Tested
   - Time Tested

Managing Failed Lots

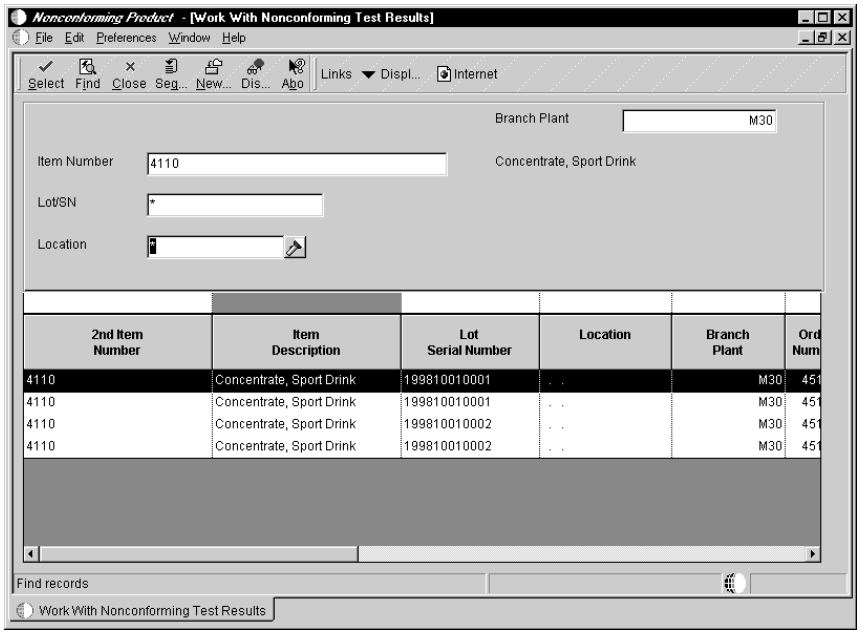
For items that have not passed test evaluation on Test Results Revisions, use the Nonconforming Product program to review all failed lots and assign a corrective action.

Before You Begin

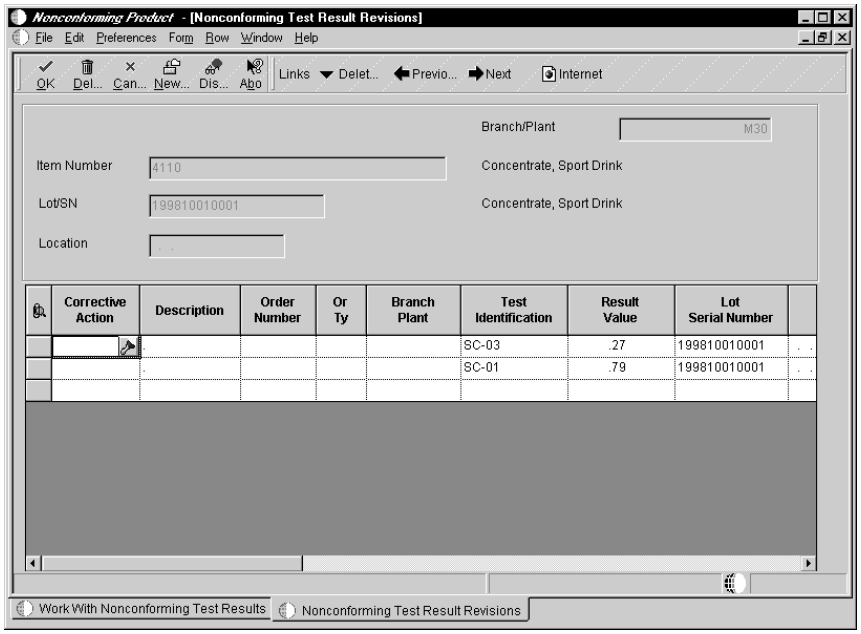
❑ Set the processing option for Enter Test Results to write failed tests to the Non-Conforming Material table (F3703).

▶ To manage failed lots

From the Quality Management Daily Operations menu (G37), choose Nonconforming Product.



1. On Work With Nonconforming Test Results, to locate a specific item and lot, complete the following fields and click Find:
   - Branch Plant
   - Item Number
   - Lot/SN
   - Location
2. Choose a record and click Select.



3. On Nonconforming Test Result Revisions, review the value ranges for test results and the following fields:
   - Description
   - Result Value
   - Date Tested
   - Time Tested
   - Target Value
4. To enter rework orders for a failed lot, complete the following fields:
   - Corrective Action
   - Order Number

   These fields do not generate rework orders. Rather, you use them to document any corrective action to be taken and to reference the associated work order.

Field	Explanation
Corrective Action	A user defined code (system 37/type RC) that explains the action to be taken following the failed test. For example, a code could be used to indicate the material that failed testing should be reworked and brought to conforming standards.
Order Number	The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.

Reviewing Tested Lots by Preference Profile

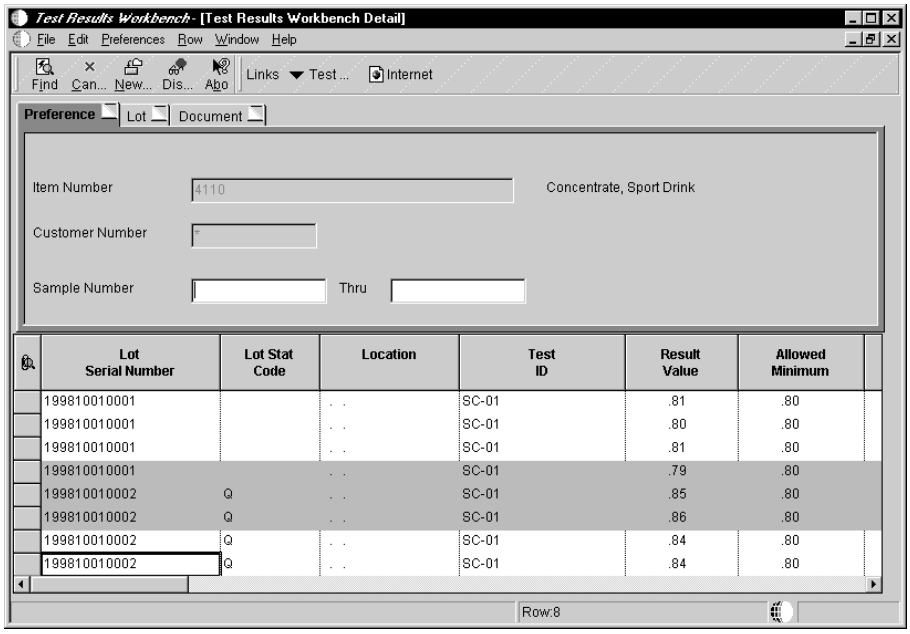
With Test Results Workbench, you can review test results for all lots tested against a particular preference profile. For example, if customers complain about the taste of a beverage, a customer service department might use Test Results Workbench to look at beverage lot numbers and the tests that had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

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

▶ To review tested lots by preference profile

From the Quality Management Daily Operations menu (G37), choose Test Results Workbench.

1. On Test Results Workbench, complete the following fields:
   - Branch/Plant
   - Item Number
2. Complete the following optional field and click Find:
   - Customer Number
3. To choose a row or rows, double-click each record until a check mark appears to the left of the row. If you want to choose all rows, do not double–click any row.
4. Choose Result Detail from the Form menu.



5. On Test Results Workbench Detail, review the test results. If you need to enter more information to narrow your search, you can use the fields on the Preference, Lot, and Document tabs.

Interoperability

Interoperability

To fulfill the information requirements of an enterprise, companies sometimes use products from different software and hardware providers. For example, a company might receive purchase orders from customers and can automatically produce sales orders in the OneWorld Sales Order Management system.

Interoperability between different products is key to successfully implementing an enterprise solution. Full interoperability between different systems results in a flow of data between the different products that is transparent to the user. OneWorld provides interoperability functions to facilitate the exchange of data with systems that are external to OneWorld.

Inbound Transactions

In an inbound transaction, you accept data from another system into OneWorld. Interoperability for inbound transactions consists of these tasks:

1. The external system sends data to the OneWorld interface tables, which hold the data before it is copied to the application tables. The external system is responsible for conforming to the format and other requirements for the interface tables. If the external system cannot write the information in the required format, it can write the data to a flat file, and you can use the OneWorld Inbound Flat File Conversion program to convert the data to the required format.
2. You run a transaction process (a batch program) that validates the data, updates valid data from the interface tables to the OneWorld application tables, and sends action messages to the Employee Work Center about invalid data.
3. You use an inquiry function to interactively review and revise the incorrect data, and then run the transaction process again. You repeat this step as often as needed to correct errors.

Outbound Transactions

In an outbound transaction, you send data from OneWorld to an external system. Interoperability for outbound transactions requires that you set a processing option specifying the transaction type. Using the master business function for the type of transaction, the system creates a copy of the transaction and places it in the interface table where external systems can access it.

Interoperability consists of the following tasks:

- ❑ Setting up for interoperability transactions
- ❑ Receiving transactions into OneWorld
- ❑ Reviewing and revising interoperability transactions
- ❑ Sending transactions from OneWorld
- ❑ Purging interoperability transaction records

See Also

- *EDI Document Processing* in the *Data Interface for Electronic Data Interchange* for more information about electronic commerce.
- *Detailed Tasks for OneWorld Operations* in the *Interoperability Guide* for more information about interoperability methods
- *OneWorld Interoperability Models* in the *Interoperability Guide* for more information about implementing asynchronous, synchronous, and batch transactions in OneWorld

Setting Up for Interoperability Transactions

External systems can use a variety of methods to send data to the interoperability interface tables. One method is to write the data to a flat file. If you use this method, the system converts the flat file to the interface table. In order for the system to convert data from the flat file to the interface table, you must identify the transaction, which includes the following information:

- Transaction type, which is a unique description to identify the transaction
- Whether the transaction is inbound or outbound
- Record type, the data that is imported or exported
- The application, the source or destination of the transaction

You can set a processing option to start the transaction process automatically when the conversion completes successfully. The transaction process copies the data from the interface tables to the application tables, from which OneWorld applications can access the data.

Setting up for interoperability transactions consists of the following tasks:

- ❑ Reviewing record types
- ❑ Setting up transaction types
- ❑ Setting up data export controls
- ❑ Setting up the flat file cross-reference
- ❑ Running the conversion program

Before You Begin

- ❑ Ensure that the flat file is a comma-delimited ASCII text (flat) file to which the workstation has read and write access.
- ❑ Ensure that the data conforms to the required format. See *Converting Data from Flat Files into EDI Interface Tables* in the *Data Interface for Electronic Data Interchange Guide* for requirements.

Reviewing Record Types

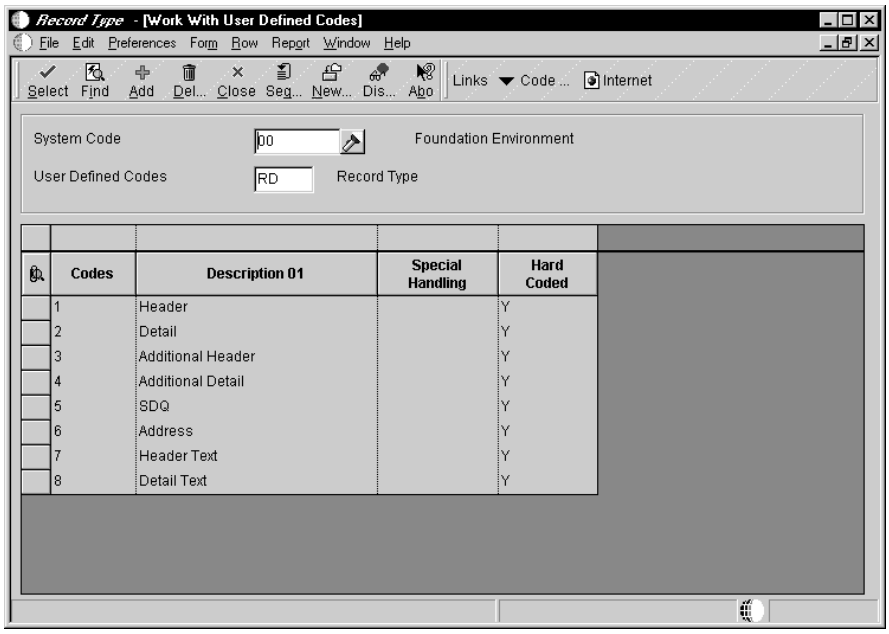
When you set up flat file cross-reference information, you must specify the record types. Record types indicate the sort of information that is exchanged between OneWorld and external systems, such as addresses, header or detail transactions, text, or additional information.

You can review hard-coded record types in the user defined code table (00/RD). The system uses these codes to identify the forms from which the system stores information for outbound documents and to which the system stores information for inbound documents.

▶ To review record types

From the Interoperability menu (G42A313), choose Record Type.

1. On Work with User Defined Codes, to review record types, click Find.



2. On User Defined Codes, review the following fields:
   - User Defined Code
   - Description

The user defined records types are hard coded by J.D. Edwards and can not be changed.

Setting Up Transaction Types

In order to identify the transactions that the system uses in the flat-file cross reference, you can add codes, or transaction types, to the user defined code table (00/TT). After you set up the transaction type, you use the transaction type to identify whether the information exchange is inbound or outbound, and to identify the corresponding applications and versions. You must set up transaction types prior to defining data export controls and flat file cross-reference information.

▶ To set up transaction types

From the Interoperability menu (G42A313), choose Transaction Types.

On User Defined Codes, complete the following fields:

- User Defined Code
- Description

For every transaction type, you must set up data export controls. If you cannot transfer or receive information with an external system, then you use the transaction type when you set up flat file cross-reference information.

Setting Up Data Export Controls

You define the export information for outbound transactions only. To set up data export controls properly, you must indicate the transaction, document type, batch application or function, and version from which the external system retrieves information from the interface tables.

You can define export controls based on either of the following:

Function Name and Library	You can specify a vendor-specific function name and library to identify the external custom program that accesses the OneWorld interface tables.
UBE or batch processor	You can specify a vendor-specific outbound batch processor that accesses the OneWorld interface tables.

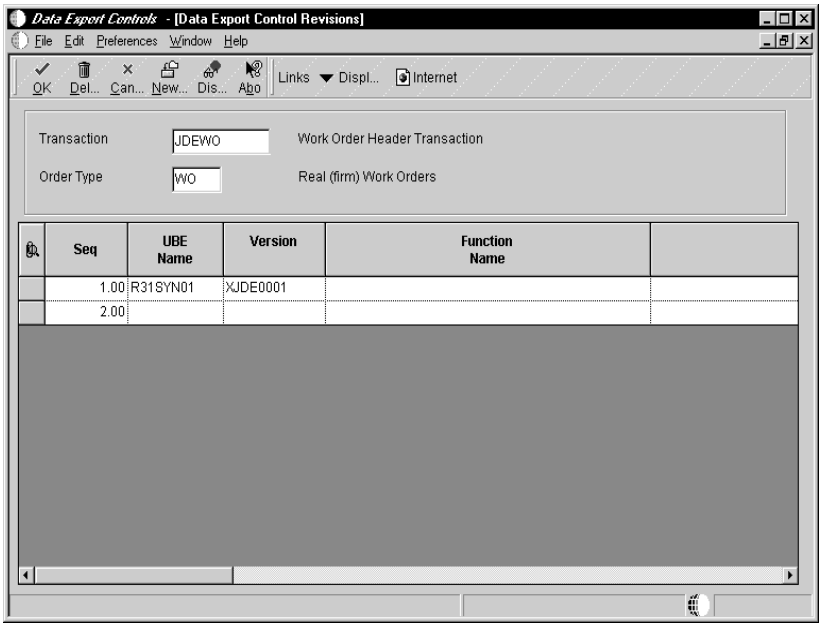
See Also

- *Detailed Tasks for Custom Programming* in the *Interoperability Guide* for information about vendor-specific applications and functions.

▶ To set up data export controls

From the Interoperability menu (G42A313), choose Data Export Controls.

1. On Work With Data Export Controls, click Add.



2. On Data Export Control Revisions, enter a specific transaction type in the following field:
   - Transaction
3. Enter Order Type in the following field:
   - Order Type
4. Enter a specific application or function in either of the following field:
   - UBE Name
   - Function Name

   You can define data export control for either a vendor-specific batch process or function. If you enter information in fields for vendor-specific batch processors or functions, the system uses the batch process.

5. If you identified an vendor-specific batch process, enter a specific version of UBE in the following field:
   - Version
6. If you identified a vendor-specific function, enter a specific function library and location in the following fields:
   - Function Library
7. Enter 1 or 0 in the following fields:
   - Execute For Add
   - Execute For Upd
   - Execute For Del
   - Ext DB Exp Mode
   - Launch Immediately
   - Execute For Inq
   - Flat File Exp Mode
   - Ext API Exp Mode
8. Click OK.

Field	Explanation
Transaction	A code that identifies a transaction by type.
Order Type	A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.) The following document types are defined by J.D. Edwards and should not be changed: P Accounts Payable documents R Accounts Receivable documents T Payroll documents I Inventory documents O Purchase Order Processing documents J General Accounting/Joint Interest Billing documents S Sales Order Processing documents

Field	Explanation
UBE Name	The OneWorld architecture is object based. This means that discrete software objects are the building blocks for all applications, and that developers can reuse the objects in multiple applications. Each object is stored in the Object Librarian. Examples of OneWorld objects include: • Batch Applications • Interactive Applications • Business Views • Business Functions • Business Functions Data Structures • Event Rules • Media Object Data Structures
Version	A version is a user-defined set of specifications. These specifications control how applications and reports run. You use versions to group and save a set of user-defined processing option values and/or data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process you must choose a version.
Execute For Add	A code that determines whether the system uses the batch application to process an added transaction record. Valid values are: 1 Use batch application to process an added transaction record 0 Do not use batch application to process an added transaction record
Execute For Upd	A code that determines whether the system uses the batch application to process an updated transaction record. Valid codes are: 1 Use batch application to process an updated transaction record 0 Do not use batch application to process an updated transaction record
Execute For Del	A code that determines whether the system uses the batch application to process a deleted transaction record. Valid codes are: 1 Use batch application to process a deleted transaction record 0 Do not use batch application to process a deleted transaction record

Field	Explanation
Ext DB Exp Mode	A code that determines whether the transaction record should be exported to an external database. Valid codes are: 1 Export transaction record to an external database. 0 Do not export transaction record to an external database.
Launch Immediately	This field controls the immediate execution of a batch job. If the field is set to a 1, the job will execute immediately.
Execute For Inq	A code that determines whether the system uses the batch application to process an inquiry of a transaction record. Valid codes are: 1 Use batch application to process an inquiry of a transaction record 0 Do not use batch application to process an inquiry of a transaction record
Flat File Exp Mode	A code that determines whether the system exports the transaction record to a flat file. Valid codes are: 1 Export transaction record to a flat file 0 Do not export transaction record to a flat file
Ext API Exp Mode	A code that determines whether the system exports the transaction record transaction record to an external API. Valid codes are: 1 Export transaction record to an external API 0 Do not export transaction record to an external API

Setting Up the Flat File Cross-Reference

When you exchange data between OneWorld and an external system, you use flat file cross-reference information for the following conditions:

- For inbound transactions, if the external system cannot write data to the interface tables in the required format for OneWorld, the external system can write the data to a specific flat file for each transaction and record type.
- For outbound transactions, if OneWorld cannot write data to the interface tables in the format required by the external system, OneWorld can write the data to a specific flat file for each transaction and record type.

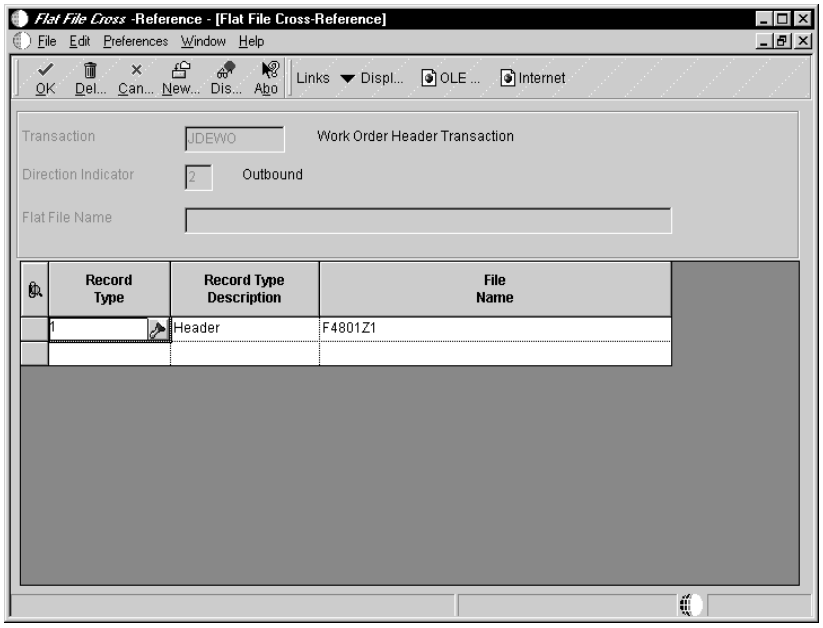
See Also

- *Converting Data from Flat Files into EDI Interface Tables* in the *Data Interface for Electronic Data Interchange Guide* for information about this process, which works the same for interoperability functions

▶ To set up cross-references

From the Interoperability menu (G42A313), choose Flat File Cross-Reference.

1. On Work With Flat File Cross-Reference, click Add.



2. On Flat File Cross-Reference, enter a specific transaction type in the following field:
   - Transaction
3. Depending on whether this transaction type is Inbound or Outbound, complete the following field:
   - Direction Indicator
4. Complete the following field to indicate the information source:
   - Record Type
5. Enter the specific file name in the following field:
   - File Name

   The file name refers to the application table from which the system exchanges information, defined by the record type.

6. Click OK.

Running the Conversion Program

From the Interoperability menu (G42A313), choose Inbound Flat File Conversion.

The Inbound Flat File Conversion program converts the flat file to the interface table. If you set the appropriate processing option, the system starts the related transaction process following successful conversion.

See Also

- *Importing from Flat Files* in the *Interoperability Guide* for setup requirements for flat file conversion

Processing Options for Inbound Flat File Conversion

```
Transaction

      1. Enter the transaction to                    _____________
      process.

Separators

      1. Enter the field delimiter.                  _____________
      2. Enter the text qualifier.                   _____________

Process

      1. Enter the inbound processor to              _____________
      run after successful completion of
      the conversion.
      2. Enter the version for the                   _____________
      inbound processor.  If left blank,
      XJDE0001 will be used.
```

Receiving Transactions into OneWorld

When receiving data, OneWorld stores the unedited data sent from the external system in interface tables. For outbound transactions, OneWorld writes data to the interface tables. The data is then sent to an external system. With this method, unedited transactions do not affect application tables. The next step is to run the appropriate transaction process to edit the transactions and update the appropriate OneWorld application tables.

In order to be received into the interface tables, data from an external system must conform to the minimum field requirements specified for the interface table.

Note: When you run the Inbound Flat File Conversion program and it completes successfully, the system automatically starts the transaction process if specified in the processing option for the conversion.

The receiving transaction process performs the following tasks:

- Validates the data in the interface table to ensure that data is correct and conforms to the format defined for the application table system
- Updates the associated application table with validated data
- Produces a report that lists invalid transactions and sends an action message for each invalid transaction to the Employee Work Center
- Marks in the interface tables those transactions that have been successfully updated to the application tables

If the report indicates errors, access the Employee Work Center from the Workflow Management menu (G02) and review the messages in the message center. Then use the associated inquiry function to review and revise the transactions and rerun the transaction process.

See Also

- *Reviewing and Revising Inbound Transactions* for more information about using the Inquiry function
- *Receiving Documents* in the *Data Interface for Electronic Data Interchange* for more information about receiving inbound EDI documents
- *Transactions Into OneWorld* in the *Interoperability Guide* for more technical information about receiving inbound transactions

- *Checking for Errors* in the *Interoperability Guide* for more information about reviewing error messages in the Employee Work Center.

Reviewing and Revising Interoperability Transactions

Running an inbound transaction process often identifies one or more invalid inbound transactions in the interface table. For example, an inventory item on an order might have an invalid address book number, Ship To address or Sold To address. The program cannot add that transaction to the Sales Order Detail table. When an error occurs, the program sends an error message to the Employee Work Center, indicating the transaction number for the transaction in error. You can inquire on the following transactions to review and revise undedited sales transactions.

Use the inquiry menu selections to add, change, or delete transactions containing errors. Then run the appropriate transaction process again. Continue to make corrections and rerun the transaction process until the program runs without errors.

You can use the processing log to review inbound and outbound transactions. See *Reviewing the Processing Log* for more information.

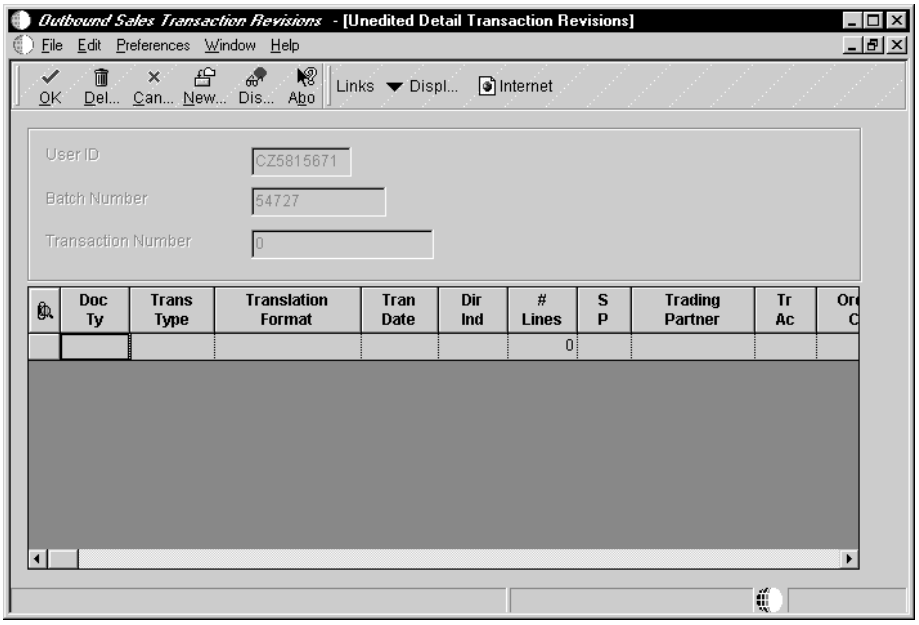
See Also

- *EDI Document Inquiry and Revision* in the *Data Interface for Electronic Data Interchange Guide* for information
- *Use the Revisions Application* in the *Interoperability Guide* for more information about reviewing and revising interoperability transactions

▶ To review and revise interoperability transactions

From the Interoperability menu (G42A313), choose Outbound Sales Transaction Revisions.

1. On Work with Sales Order Unedited Transactions, to limit the search to specific transactions, complete the following fields:
   - User ID
   - Batch Number
   - Transaction Number
2. Click Find.
3. Choose the transaction to review and revise and click Select.



4. On Sales Order Unedited Detail Transactions Revisions, review and revise as needed, and click OK.
5. If applicable, choose Detail Revisions from the Row menu to review or change additional detail information, and click OK when finished.

After you correct the errors identified by the Inbound Transaction Process, run the transaction process again. If other errors are identified, correct them and run the transaction process again.

Field	Explanation
User ID	The source of the transaction. This can be a user ID, a workstation, the address of an external system, a node on a network, and so on. This field helps identify both the transaction and its point of origin.
Batch Number	The number that the transmitter assigns to the batch. During batch processing, the system assigns a new batch number to the J.D. Edwards transactions for each control (user) batch number it finds.
Transaction Number	This is the number that an Electronic Data Interchange (EDI) transmitter assigns to a transaction. In a non-EDI environment, you can assign any number that is meaningful to you to identify a transaction within a batch. It can be the same as a J.D. Edwards document number.

Reviewing the Processing Log

You can use the processing log to review whether the system has processed inbound and outbound transactions. With the processing log, you can review whether a vendor-specific transaction has been successfully processed. The processing log contains key information from the Data Export Control table about the interoperability transaction, such as the transaction type, order type, sequence number, batch process or function, and corresponding version. The system creates a record for every transaction that is processed.

The information in the processing log is for review only and can not be changed in either the processing log or OneWorld applications.

See Also

- *Subscribing to Outbound Transactions* in the *Interoperability Guide* for more information about the data export control table and the processing log

Sending Transactions from OneWorld

You might send transactions you create or change in the Sales Order Management system to an external system. For example, if your organization sends order acknowledgements to customers, you can use Interoperability transactions to convey order and price information.

The default outbound transaction is a copy of a data transaction after you created or changed it (an *after image*). With OneWorld interoperability features, you can also send a copy of each transaction as it was before you changed it (a *before image*). Creating and sending before images requires additional processing time. To control the type of image, you set a processing option in the application programs that create transactions.

You can send transactions from OneWorld to an external system using any of the following interoperability methods:

Batch extraction processor	When you run an extraction process, the application retrieves data from the J.D. Edwards application tables for the transaction and copies the data to the interface tables. The system then generates an audit report that lists the processed documents.
Batch and subsystem process	All outbound master business functions used to create transactions have processing options that control the interoperability transaction. For batch and subsystem processing, you set up the processing options in the appropriate business function version for interoperability and then specify that application and version in the data export controls.

In order to enable outbound processing, you must set a processing option in the following Sales Order Management applications:

- Sales Order Entry
- Ship Confirm

The system places a copy of the transaction in the interface table for that type of transaction. For example, when you run Sales Order Entry with the Interoperability processing option turned on, the system places a copy of sales

order in the interface table. The data is then available for an external system to use.

Before You Begin

❑ Define the data export controls for the type of outbound transaction. The system uses data export controls to determine the batch programs or business processes that third parties supply for use in processing transactions.

See Also

- *Sending Product Activity Data (852/INVRPT)* in the *Data Interface for Electronic Data Interchange Guide* for more information about issues, transfers, and adjustments
- *Detailed Tasks for OneWorld Operations* in the *Interoperability Guide* for more information about interoperability methods
- *OneWorld Interoperability Models* in the *Interoperability Guide* for more information about implementing asynchronous, synchronous, and batch transactions in OneWorld

Purging Interoperability Transaction Records

When data becomes obsolete or you need more disk space, you can use purge programs to remove data from interface files.

The Interoperability menu contains a purge option for both inbound and outbound transactions. Use the following purges to remove data from the corresponding interface tables:

- Purging Sales Transactions Records (R4211Z1P)

See Also

- *Purge Batch Process and Named Event Rules* in the *Interoperability Guide* for more information about purging information from the interface tables

Reports

Quality Management Reports

The Quality Management system provides a variety of reports that contain information about how you have defined tests, specifications, and preferences, as well as the results of quality testing.

Quality Management Reports consists of the following tasks:

- ❑ Printing setup reports
- ❑ Printing test results reports

Printing Setup Reports

Use setup reports to review information about how you have defined tests, specifications, and preferences. Note that the name of the preference report is Item Test/Specification report.

Printing setup reports consists of the following tasks:

- ❑ Printing the Test Definition report
- ❑ Printing the Specifications report
- ❑ Printing the Item Test/Specification (Preferences) report

Printing the Test Definition Report

From the Quality Management Setup menu (G3741), choose Test Definition Report.

The 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 your products.

See Also

- *R37410, Test Definition Report* in the *Reports Guide* for a report sample

Processing Options for Test Definition Report (R37410)

```
Workflow

      Enter the test status for                          _____________
      selecting test definitions.

      1 = Pending
      2 = History
      3 = Rejected
      blank = Active/Approved
      Enter the as of date for selecting                 _____________
      test definitions.
```

Printing the Specifications Report

From the Quality Management Setup menu (G3741), choose Specifications Report.

The 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 your business.

See Also

- *R37415, Specifications Report* in the *Reports Guide* for a report sample

Processing Options for Specifications Report (R37415)

```
Workflow

      Enter the specification status for                _____________
      selecting specification
      definitions.

      1 = Pending
      2 = History
      3 = Rejected
      blank = Active/Approved
      Enter the as of date for selecting                _____________
      specification definitions.
```

Printing the Item Test/Specifications (Preferences) Report

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

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

See Also

- *R37420, Item Test/Specifications Report* in the *Reports Guide* for a report sample

Processing Options for Item/Test Specifications (R37420)

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

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

1 = Pending
2 = History
3 = Rejected
blank = Active/Approved

Enter the as of date for selecting test/specification definitions. _____

Printing Test Results Reports

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

Printing test results reports consists of the following tasks:

- ❑ Printing the Certificate of Analysis
- ❑ Printing the Product Test report
- ❑ Printing the Test Results Worksheet

Printing the Certificate of Analysis

From the Quality Management Daily Operations menu (G37), choose Certificate of Analysis.

You can print a Certificate of Analysis when a customer requires additional reporting. The Certificate of Analysis lists all of the tests performed and the test results for lots sold to a customer.

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 located. The system then prints all test results for each lot.

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

Note: You can set processing options in the Ship Confirm program to print Certificates of Analysis automatically.

See Also

- *R37460, Certificate of Analysis* in the *Reports Guide* for a report sample

Before You Begin

- ❑ Determine which tests and generic text to print on the Certificate of Analysis. See *Defining Tests.*

- ❑ Determine which customers should receive a Certificate of Analysis. See *Setting Up Customer Billing Instructions.*

- ❑ Determine the type of transaction records to use for tracing lots. See *Setting Up Inclusion Rules for Test Results Tracing.*

Processing Options: Certificate of Analysis Extract

Defaults Tab

These processing options control the address that appears on the Certificate of Analysis and overriding the 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. For more information, see *Working With Shipments* in the *Sales Order Management Guide.*

1. Address Type

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

1 Print the ship to address.
2 Print the sold to address.
3 Print the parent address.
Blank Ship to address

2. Next Status

Use this processing option to override the Next Status code if you need to indicate on a sales order that you printed a Certificate of Analysis.

Enter a value from your 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 Tab

This processing option controls whether you can reprint Certificates of Analysis without rerunning them.

1. Extract Table

Use this processing option to specify whether to save history information in the Certificate of Analysis extract table so that you can reprint certificates without needing to rerun them. For example, you might need to reprint a Certificate of

Analysis that was lost in the mail for a customer who requires the certificate in order to accept product. Valid values are:

1 Do not clear the Certificate of Analysis extract table (save history information), to allow reprints.
Blank Clear the Certificate of Analysis extract table each time the report is run.

Trace Tab

This processing option controls whether you trace test results.

1. Trace

Use this processing option to control whether the system traces test results for lots. You can find test results for an assembled item, the components of the assembled item, or for an item that has been reclassified. Valid values are:

1 Trace single level test results by lot.
2 Trace multilevel test results by lot.
Blank Do not trace test results.

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 Tab

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

1. Preference Test Results

Use this processing option to control whether the system uses preference profiles to print test results on the Certificate of Analysis. Valid values are:

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.
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.

Print Tab

These processing options control the version of the Certificate of Analysis to print and the ability to reprint certificates without needing to rerun them. Versions control how programs display information.

1. Certificate of Analysis (R37460)

Use this processing option to print a Certificate of Analysis, which lists all of the tests performed and their results for lots sold to a customer.

Enter the version of the Certificate of Analysis to print. If you leave this processing option blank, the program uses the ZJDE0001 version.

2. User Defined Program

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

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

3. User Defined Version

Use this processing option to specify the version of your 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 your customized certificate to print.

4. Language

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

Blank Print the Certificate of Analysis in the default language.
1 Print the Certificate of Analysis in the customer's preferred language.

Printing the Product Test Report

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

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

Although this report is intended for internal use, you can print Test Results in a Certificate of Analysis 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 multi-level test results for each lot located. The system prints all test results for each lot.

See Also

- *R37450, Product Test Report* in the *Reports Guide* for a report sample

Processing Options: Product Test Report Extract (P37901)

Extract Tab

This processing option controls whether you can reprint Product Test Reports without rerunning them.

1. Retain Extracted Information

Use this processing option to retain information that the system extracts from the Certificate of Analysis (COA) table (F37900) 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. Valid values are:

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

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

Trace Tab

This processing option controls whether you trace test results.

1. Trace Test Results

Use this processing option to specify the level of tracing for the test results for lots. This processing option traces test results for an assembled item, the components of the assembled item, or a reclassified item. Valid 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 Tab

These processing options control the version of the Product Test Report to print and the ability to reprint reports without needing to rerun them. Versions control how programs display information.

1. User Defined Report

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

2. User Defined Version

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

Version Tab

This processing option allow you to enter versions for Product Test Reports programs. Versions control how programs display information. If a processing option is blank, the program uses the ZJDE0001 version.

1. Product Test Report

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

Printing the Test Results Worksheet

From the Discrete Order Preparation menu (G3111) in Shop Floor Management, choose Order Processing.

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

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

- As an instruction sheet for tests to be run
- As a blank form for hand-written test results to be entered

See Also

- *Running Order Processing* in the *Shop Floor Management Guide* for additional information on order processing
- *R37470, Test Results Worksheet* in the *Reports Guide* for a report sample

Processing Options for Test Results Worksheet (R37470)

```
Print

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

Preference

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

Text

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

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