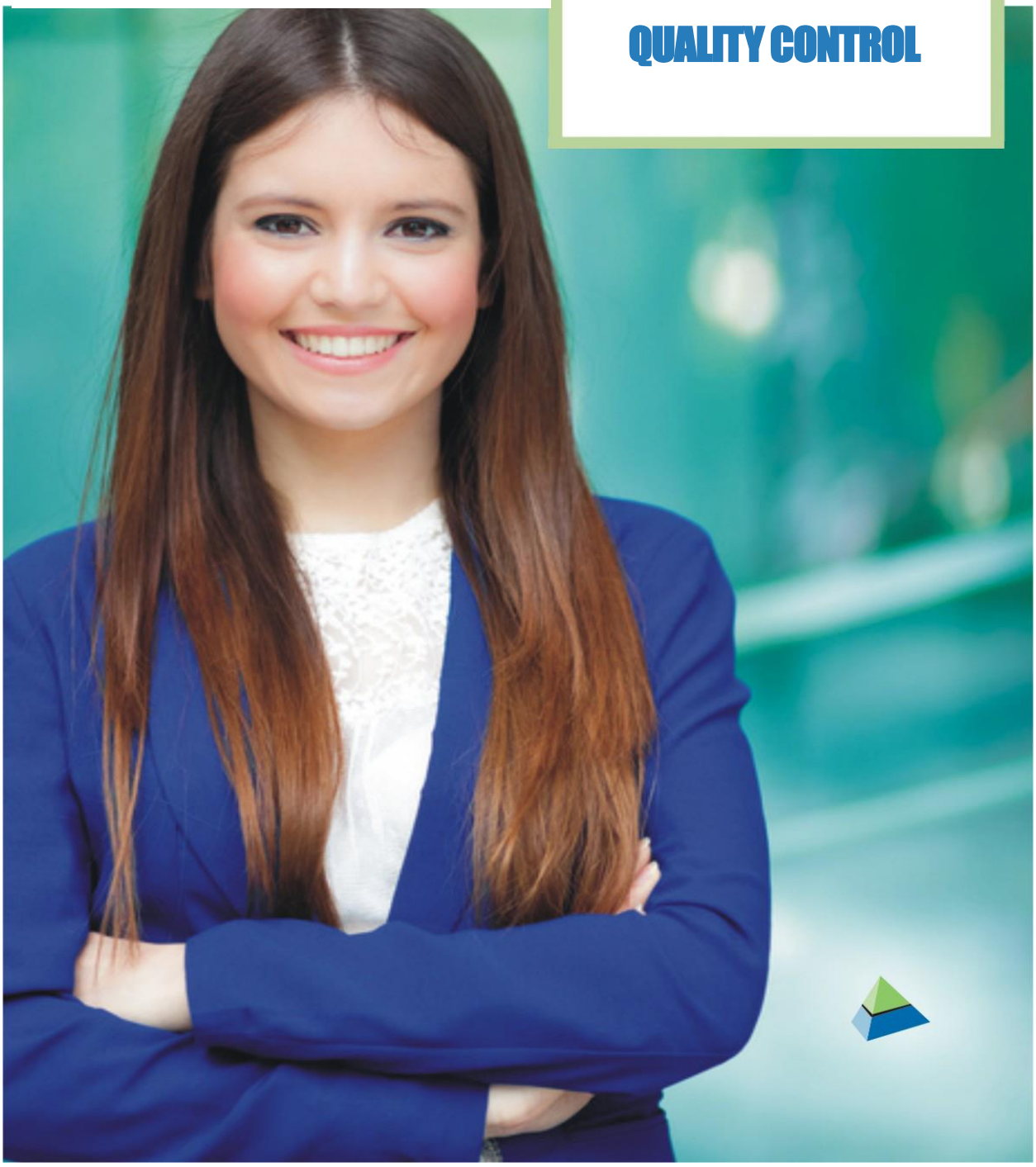
BATCHMASTER® ERP 18.2

User Guide

BatchMaster ERP with SAP Business One

BatchMaster Solutions
for Process Manufacturers

QUALITY CONTROL



Copyright and Legal Information

About the Manual

Symbols & Conventions

Symbol	Description
	Note
	Mandatory setting
	Tips

Convention	Description
Italicized (*Sales Order Entry*)	Module name, screen name & components
“ ” (“BatchMaster ERP with SAP Business One Hardware and Software Requirements Document”)	Reference Document

Abbreviation	Description
ERP	Enterprise Resource Planning
QC	Quality Control

Contents

1 DOCUMENT OVERVIEW

This document gives an overview of the *Quality Control Module* and how BatchMaster ERP with SAP Business One (BatchMaster ERP) can help process manufacturers. It explains system features in conversational language using general and industry-specific examples. After reading this you should be able to use the module in at least a basic way.

1.1 What Is This Document All About?

Quality Control (QC) is a process employed to ensure that a product or performed service adheres to a defined set of quality criteria or meets the requirements of the client or customer. BatchMaster ERP helps you employ stringent quality control procedures on inventory items.

QC includes all the actions that a business requires for the control and verification of characteristics of a product or service. The basic goal of QC is to ensure that the products, services, or processes provided meet specific requirements and are dependable, satisfactory, and fiscally sound.

1.2 Who Should Read This Document?

This document is intended for anyone who is implementing the software, learning how to use it, or training another person.

1.3 What's New in this Release?

- Quality Monitoring Dashboard

1.4 Objectives

This document is intended to help the reader:

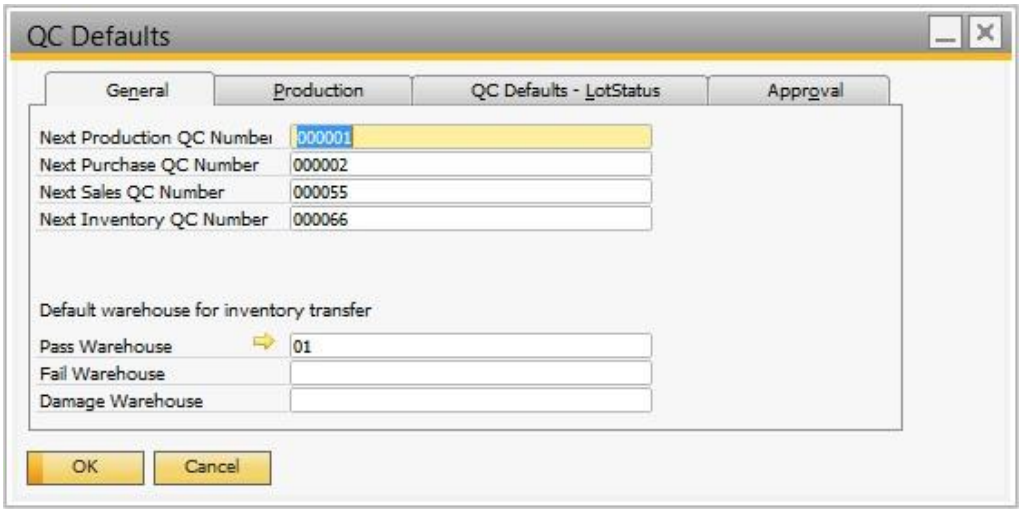
- Identify the purpose and functioning of the features in BatchMaster ERP.
- Identify the industry-specific utility of each feature.
- Record data in the system and perform transactions.
- Explain the purpose of features to others using examples.
- Identify the business uses for reports and inquiries.

2 QUALITY CONTROL SETUP

2.1 QC Defaults

The *QC Default* screen is used to define setup options and QC document numbering.

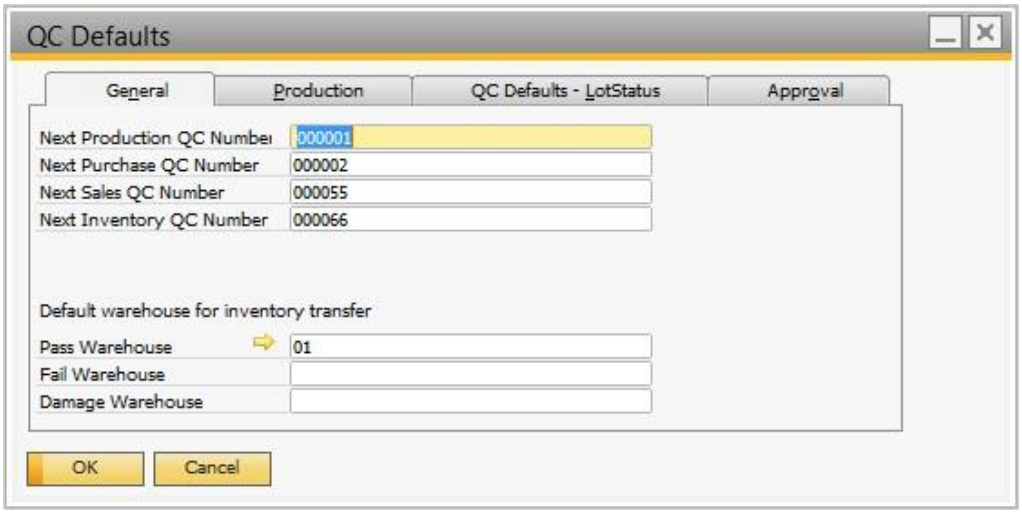
Go To: Administration → Setup → Quality Control → QC Defaults.



2.1.1 General Tab

Using the options in the *General* tab, you can do the following:

- Establish the default warehouses (one for each of these cases) where passed, failed, and damaged inventory items should be sent.
- Specify the next production, purchase, sales, and inventory default QC numbers.



Next Production QC Number: The QC Order Number to be assigned to the next production QC order. You can use an alphanumeric series.

Next Purchase QC Number: The QC Order Number to be assigned to the next purchase QC order.

Next Sales QC Number: The QC Order Number to be assigned to the next sales QC order.

Next Inventory QC Number: The QC Order Number to be assigned to the next inventory QC order. Such QC orders can be defined at any point in the receiving, production, or shipping process.

Default Warehouse for Inventory Transfer: Use this field to specify default warehouses for passed, failed, and damaged goods.

Pass Whse: The default 'pass' warehouse where accepted goods will be posted.

Fail Whse: The default 'fail' warehouse where rejected goods will be posted.

Damage Whse: The default 'damage' warehouse to which the items scrapped in QC will be posted.

Update: Click the *Update* button to save the settings.

Cancel: Click the *Cancel* button to close the screen without saving the settings.

2.1.1.1 Specifying General Settings

1. Open the *QC Defaults* screen.
2. Specify the subsequent production QC order number in the *Next Production QC Number* field.

3. Specify the appropriate values in the Next Purchase QC Number, Next Sales QC Number, and Next Default QC Number fields.

4. Choose the default warehouse for QC approved inventory using the lookup next to the *Pass Whse* field.

5. Specify the default warehouse for rejected inventory using the lookup next to the *Fail Whse* field.

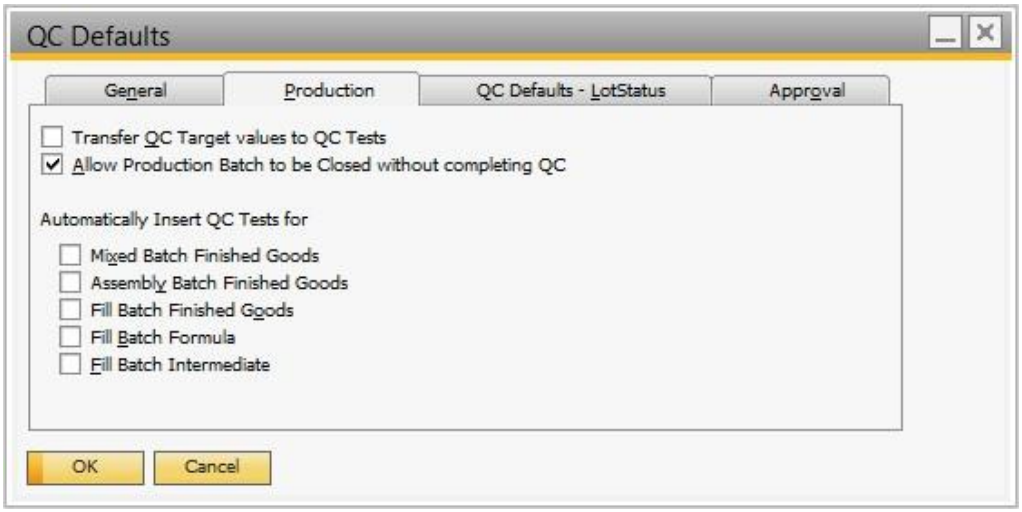
6. Select the default warehouse for the damaged inventory using the lookup next to the *Damage Whse* field.

7. Click the *Update* button to save the settings.

2.1.2 Production Tab

From the *Production* tab you can define how a production QC record is created when a production batch is released.

Go To: Administration → Setup → Quality Control → QC Defaults.



Transfer QC Target Values to QC Tests: Check this option when you want the QC technician to see target values while conducting tests. This is a business decision: not displaying the target values forces the technician to test and record the results, whereas if the target values are displayed a technician could enter a passing value without actually performing the test. However, having the target values visible gives the technician a benchmark to ensure that test results are not entered erroneously (e.g., placing a decimal point in the wrong place).

Allow Production Batch to Be Closed without Completing QC: Checking this option allows you to close a production batch while waiting for test results that take a significant amount of time to acquire or review. The intermediate or finished good produced by the batch will go to a QC Hold bin location. It cannot be processed further or sold until the QC technician records the test results and releases the inventory.

Automatically Insert QC Tests for: Check each box to automatically create a QC Test Document for the respective batch type, Fill type Batch for Finished Goods, Formula and Intermediate. Once the document is created, it must be processed by the QC technician before the batch output can be processed further or sold.

It is always possible to create a QC Test Document manually if the default is not checked.

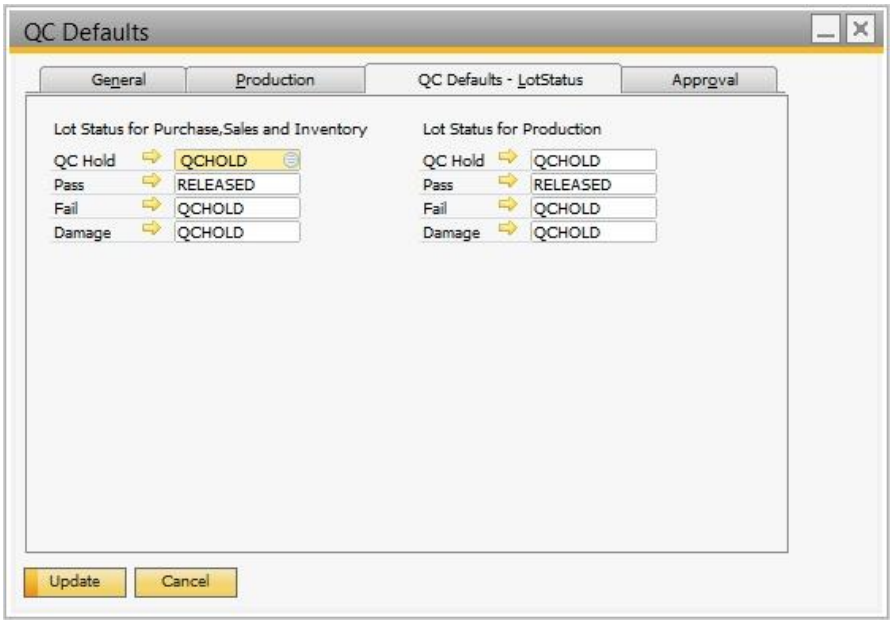
For information on the different batch types, please refer to the "*BME-B1 18.2 Production User Guide*."

2.1.2.1 Specifying Production Settings

1. Switch to the Production tab on the *QC Defaults* screen.
2. Check the Transfer QC Target values to *QC Tests* option, if need be.
3. Check the *Allow Production Batch to be Closed without completing QC* option to close production batches without performing QC.
4. Select one or more of the checkboxes under the *Automatically Insert QC Tests for* header, if desired. Available options are *Mix Batch Finished Goods*, *Assembly Batch Finished Goods*, *Fill Batch Finished Goods*, *Fill Batch Formula*, and *Fill Batch Intermediates*.

2.1.3 QC Defaults-Lot Status Tab

This screen is where you specify the default lot status to be applied to an item during QC testing as well as when test results are entered.



Lot Status records are maintained at: **Administration → Setup → Inventory → Lot Status**

During transactions, the lot status of an item is assigned according to the following hierarchy:

- If the item has QC applicable at the Item Master Details screen, the QC HOLD status from the QC defaults screen is applied.
- If the item does not have QC applicable, the "Default lot status when receiving" at the Item Master Details screen is applied. This status applies to GRPO receipts and production receipts (batch close or partial close.) If this field is blank for an item and no QC is applicable:
- The system assigns a lot status "ALL".

The status of a lot can be changed by an authorized user at the *Change Lot Status* screen found under the Quality Control menus.

The status of a lot can be viewed on the Inventory Detail report (for purchased items) or the Production Goods Transaction Report (for make items.)

2.1.3.1 Specifying QC-Default lot Status

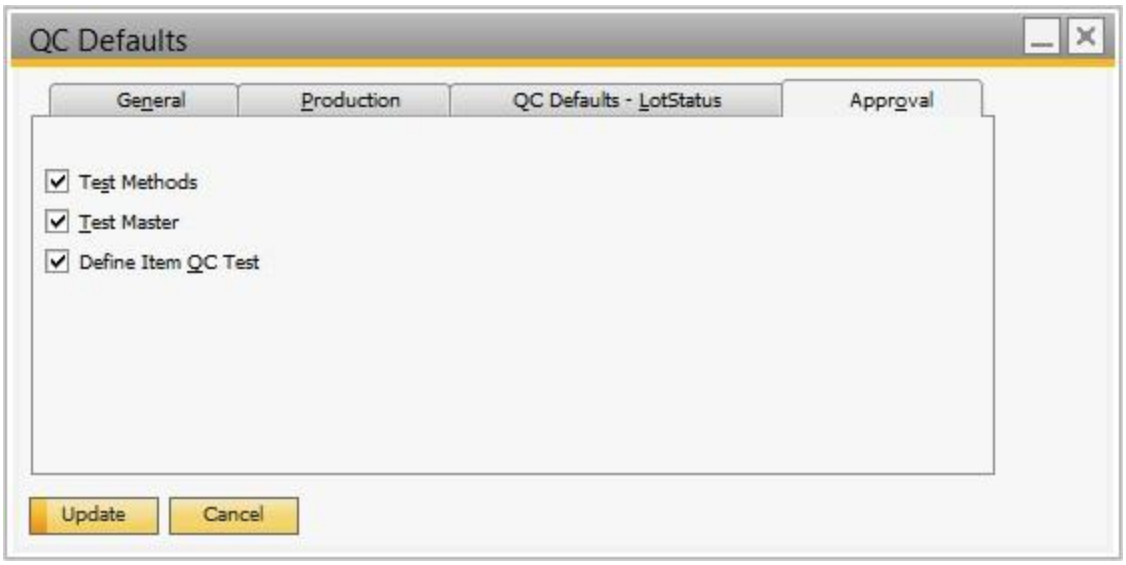
1. Switch to the *QC Defaults Lot Status* tab.
2. Use the lookup next to *QC Hold* to assign the default lot status for the lot which is kept on hold.
3. Use the lookup next to *Pass* to assign default lot status for the lot accepted during the Purchase, Sales and Inventory QC process.
4. Use the lookup next to *Fail* to assign default lot status for the lot rejected during the Purchase, Sales and Inventory QC process.
5. Use the lookup next to *Damage* to assign default lot status for the lot found damage during the Purchase, Sales and Inventory QC process.
6. Similarly, specify the default *Lot status* for Production QC process as well.
7. Click the *Update* button to save the modifications.

2.1.4 Approval Tab

Using this tab you can apply approval procedure on following QC documents:

- Test methods.
- Test Master.
- Define Item QC Test.

Go To: Administration → Setup → Quality Control → QC Defaults.



Test Methods: Mark this checkbox to apply approval workflow on a QC test method defined on the *Test Method* Screen. If you opt it the Test Method screen layout changes to *Test Method Draft* Screen.

Test Master: Mark this checkbox to apply approval workflow on the *Test Master* Screen. If you opt it the Test Master Screen layout changes to the *Test Master Draft* screen.

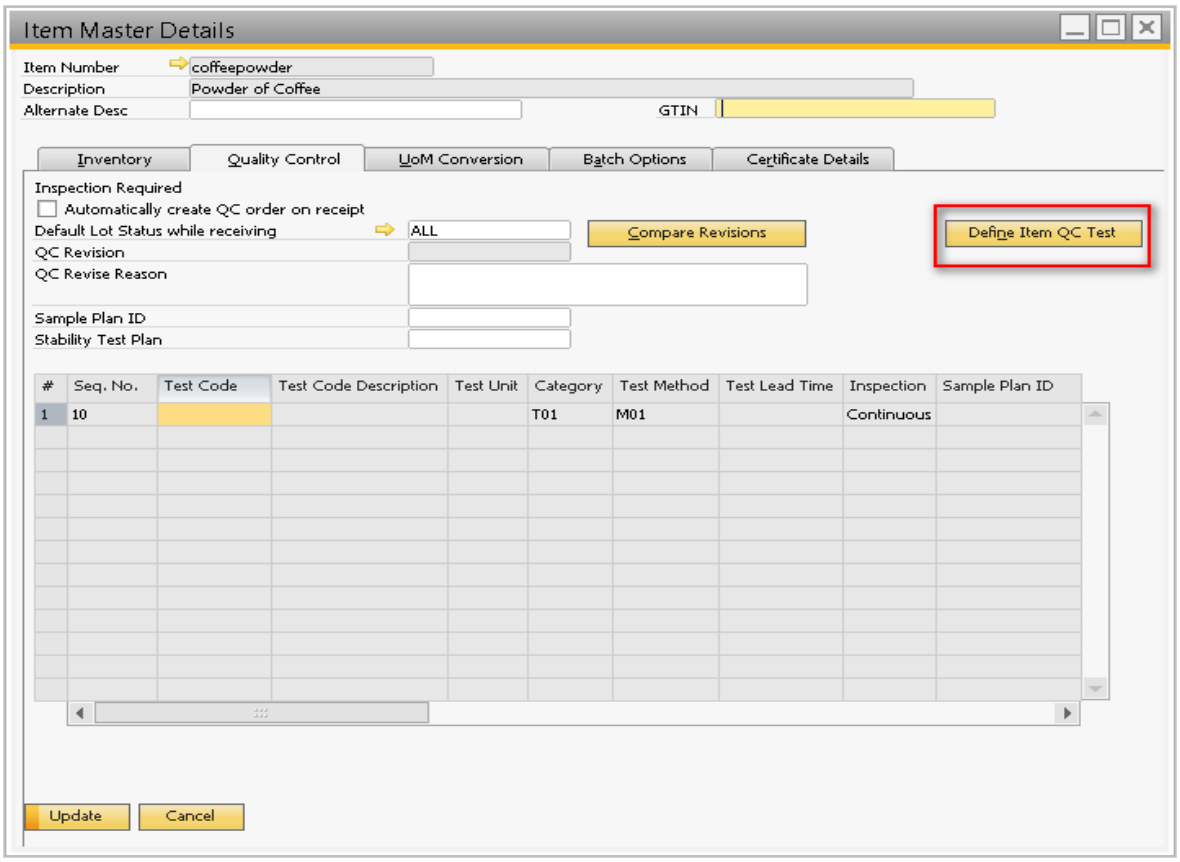
Define Item QC Test: Mark this checkbox if you wish to apply approval workflow on Item QC tests. Opting it, *Define Item QC test* button gets displayed on the *Item Master Details* screen, from where you define item-wise QC test and send them for approval..

2.1.4.1 Specifying Approval on QC Documents

1. Switch to the *QC Defaults Approval tab*.
2. Check the QC documents on which approval procedure needs to be applied.
3. Click on the *Update* button to save changes.

2.1.5 Define Item QC with Approval Procedure

If approval is implemented, *Test grid* on *Item Master Details QC Tab* becomes non-editable. You must use the *Define Item QC Test* button to open *Define Item QC Test Draft* Screen.



Automatically Create QC order on receipt: Mark this checkbox to create Purchase QC order automatically, when an item is received.

Default lot status while receiving: This lookup shows the lot status to be assigned at time of receipt. It displays the statuses you have maintained at Lot status screen.

QC Revision: This field shows QC revision number. This is a read-only field.

QC Revise Reason: Enter comments/notes for specific reason for QC revision.

Compare Revisions: Click this button to compare different QC revisions of the same item.

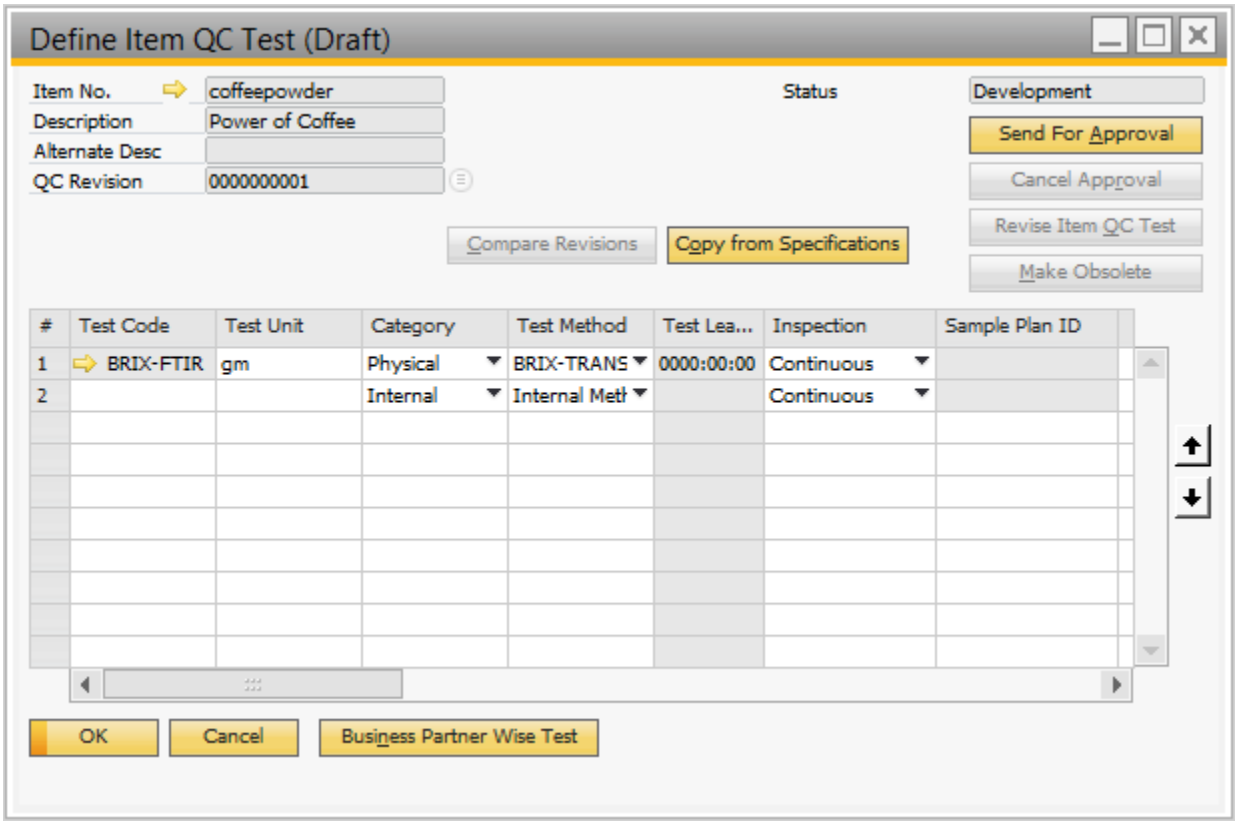
Define Item QC Test: Click this button to open Define Item QC Test Draft Screen. Here you can maintain Item QC tests and send it for approval.

Update: Click this button to update the changes.

Cancel: Click this button to discard changes.

2.1.5.1 Define Item QC Test Draft

This screen is used to define QC test for an item with available test category and methods. When the user adds a new test record, its status is “development.”



Item No: This lookup allows you to select an item defined in the *Item Master* screen.

Description: This field shows the description of the Item.

Alternate Description (Optional): Allows definition of a customer-friendly description to print on ingredient statements.

QC Revision: This field shows auto generated revision number. Each changes have unique revision number.

Test Code: This lookup allows you to select from defined Test IDs.

Test Unit: This field shows the test unit such as kg, liter. This is for reference only and should not be confused with inventory unit of measure.

Category: Select the test category as defined on the *Test Category* screen.

Test Method: Select test method as defined on the *Test Method* screen.

Test Lead Time (Optional): Specify the time needed to complete the test.

Inspection: This lookup allows you to select predefined inspection type: continuous or sampling.

Sample Plan ID: If you choose sampling as inspection method then select a sample plan ID.

Measuring: Specify how test results are measured. The possible values are *Pass/Fail, Numeric,* and *Alphanumeric.* For example, the results of pH test are measured in numeric value.

Target Value: Specify the ideal numeric value expected in the test results. This field is valid only if the *Measuring* type is *Numeric*.

Control Lower Limit 1: Specify the lowest acceptable value of the test result. For example, you have a specification that pH of milk should be between 8 and 10. In such a case, the *Control Lower Limit* is 8.

Control Upper Limit 1: Specify the highest acceptable value of the test result. Consider the same example, pH test for milk, the *Control Upper Limit* is 10.

Maximum Allowable % defective 1: Specify the acceptable percentage of defective samples. A value greater than the specified value will result in rejection of the lot.

Target Alpha: For an alphanumeric test, specify the ideal alphanumeric value expected in the test results.

Print COA: Select this checkbox to print the test results on the Certificate of Analysis (COA) report.

Remarks: Specify any instruction or notes about the test. For example, you could specify the ambient temperature at which this test should be conducted.

Purchase QC: Select this checkbox to implement QC inspection tests on the item during its receipt.

Production QC: Select this checkbox to implement QC inspection tests on the item after it is produced.

Sales QC: Select this checkbox to implement QC inspection tests on the item prior to shipment. This is an opportunity to establish a QC test based on customer requirements.

Inventory QC: Select this checkbox to implement QC inspection tests on inventoried items. The most common use is to make sure the item and lot are able to be used in production or shipped to a customer.

Status: This field shows valid QC test statuses such as Development, Pending, Cancelled, Approved and Obsolete.

Send for Approval: Clicking this button sends an alert to the first authorizer defined by the applicable approval process.

Cancel Approval: Click this button to cancel Approval Request.

Revise Item QC Test: Click this button to perform modifications on Item QC test.

Make Obsolete: Click this button to change the status of QC test to "obsolete."

Business Partner wise List: Click this button to define QC tests at the business-partner level. These tests will override QC tests defined at item level.

Up Down Re-Sequence Button: Up and Down re-sequence button will re-sequence Test Code details.

Copy from Specification: Click this button to access the *Copy Item QC Tests from Item Specifications* screen, which lets you copy specifications to the *QC Item Test* grid. Select the *Show for All Items* option to show the selected QC Specifications for all items. Selected test values will be copied to the Item QC Test grid. While copying the specifications, the *Spec ID Code* will be copied to the *Test Code ID* field. If the Test Code does not exist with the same *Spec ID* name in the test master, then BatchMaster ERP will create a Test Code with the same Spec ID and Description. If the Spec ID already exists in the Item QC Test grid, then the system will display a warning message that some of the Item QC Tests already exist with the same Specification ID, do you want to override?

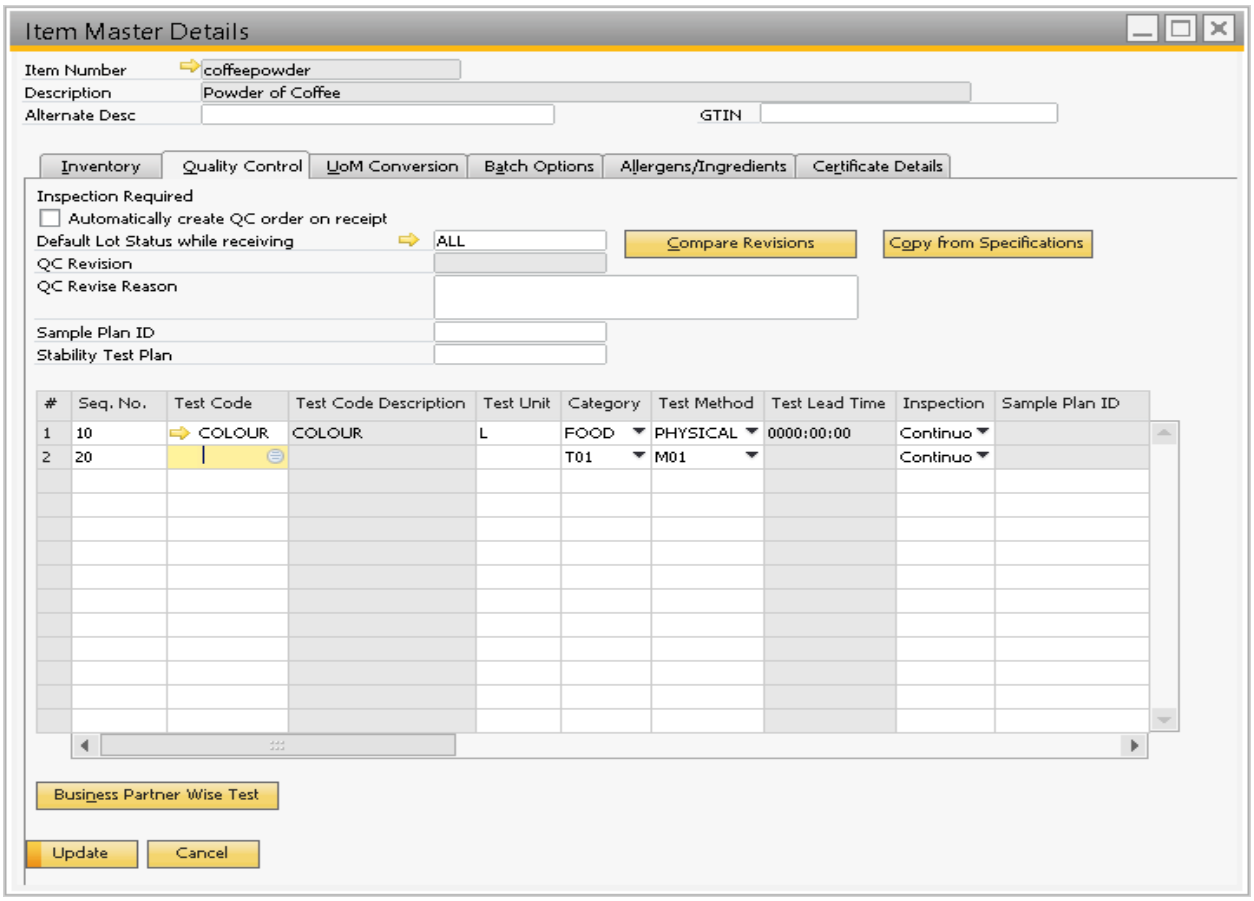
Compare Revisions: Click this button to compare different QC revisions for the same item.

Ok: Click this button to save changes on screen.

Cancel: Click this button to discard changes and close the screen.

2.1.6 Define Item QC without Approval Procedures

Here you will define the specific QC tests needed for the item, the target test values, and the business process points at which the QC tests must occur.

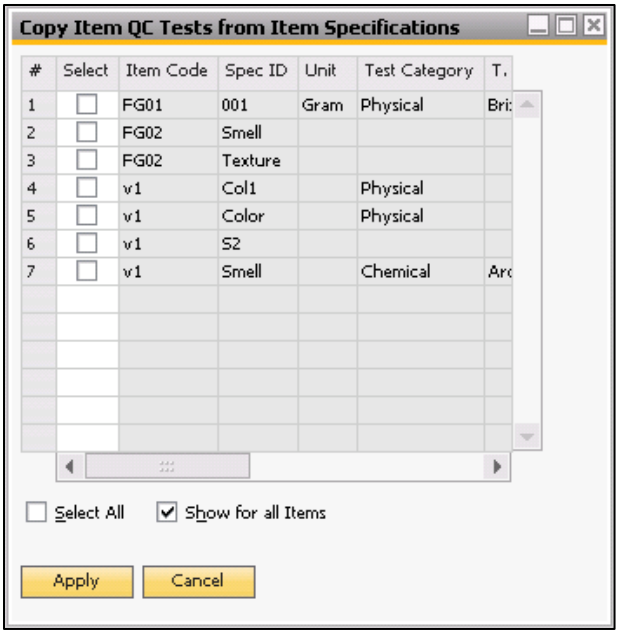


QC Revision: View the QC revision number. This is a read-only field.

QC Revise Reason: Specify the reason for the QC revision.

Compare Revisions: Click this button to compare different QC test revisions of the same item.

Copy from Specifications: Click this button to access the *Copy Item QC Tests from Item Specifications* screen, which lets you copy specifications to the *QC Item Test* grid. Select the *Show for All Items* option to show the selected QC Specifications for all items. Selected test values will be copied to the Item QC Test grid. While copying the specifications, the *Spec ID Code* will be copied to the *Test Code ID* field. If the Test Code does not exist with the same *Spec ID* name in the test master, then BatchMaster ERP will create a Test Code with the same Spec ID and Description. If the Spec ID already exists in the Item QC Test grid, then the system will display a warning message that some of the Item QC Tests already exist with the same Specification ID, do you want to override?



Test Grid Details:

#: Field displays the sequence number of the row.

Seq No: When you add a new test row in the grid, the system auto generates the sequence number of the attached test row in multiple of tens, say 10, 20, 30 and so on. To reorder the test row sequence you can simply modify its sequence number. For example, you have added three test rows in the grid of sequence number 10, 20 and 30. Now, to change the sequence of third row to second you can simply modify the third row sequence number from 30 to any number that lies between 10 and 20, say 11. This will change the third row to second and second to third row. Note that, for every new row entered, the generated sequence number will be the nearest multiple of ten on the higher side.

Test Code: Select a code from the *Test Master*. The system defaults inspection, measuring, test unit, category and test methods.

Test Unit: Specify the test unit, this is a free screen field and should not be confused with inventory units of measure.

Category: Specify a test category such as microbiological and organoleptic.

Test Method: Specify test methods employed for the test such as Brix-FTIR, PH-Glass Electrode, and HPLC.

Test Lead Time: Specify the time needed to complete this test.

Inspection: Specify inspection plan for the test. Typically you choose sampling as inspection plan.

Sample Plan ID: If you choose sampling as inspection method then select a sample plan ID.

Measuring: Specify how test results are measured. The possible values are *Pass/Fail, Numeric,* and *Alphanumeric.* For example, the results of pH test is measured in numeric value, whereas the result of odor test is alphanumeric.

Target Value: Specify the ideal numeric value expected in the test results. This field is valid only if the *Measuring* type is *Numeric*.

Control Lower Limit 1: Specify the lowest acceptable value of the test result. For example, you have a specification that pH of milk should be between 8 and 10. In such a case, the *Control Lower Limit* is 8.

Control Upper Limit 1: Specify the highest acceptable value of the test result. Consider the same example, pH test for milk, the *Control Upper Limit* is 10.

Max Allowable % Defective 1: Specify the acceptable percentage of defective samples. A value greater than the specified value will result in rejection of the lot.

Target Alpha: For an alphanumeric test, specify the ideal alphanumeric value expected in the test results.

Print On COA: Select this checkbox to print the test results on the Certificate of Analysis (COA) report.

Remarks: Specify any instruction or notes about the test. For example, you may specify the temperature at which this test should be conducted.

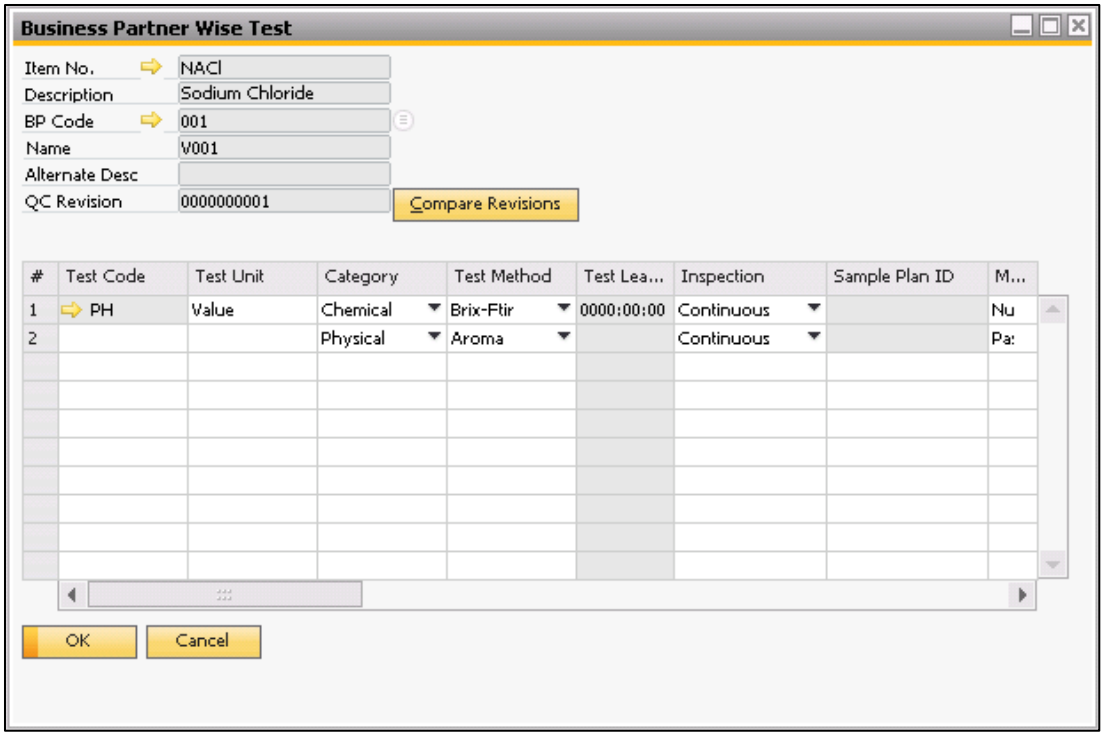
Purchase QC: Select this checkbox to implement QC inspection tests on the item during its receipt.

Production QC: Select this checkbox to implement QC inspection tests on the item after it is produced.

Sales QC: Select this checkbox to implement QC inspection tests on the item during its sales.

Inventory QC: Select this checkbox to implement QC inspection tests on inventoried items. The most common use is to make sure the item and lot are able to be used in production or shipped to a customer (meaning no expiry or damage.)

Business Partner Wise Test: Click this button to define QC tests at business-partner level. These tests will override QC tests defined at item level.



Header

Item No: View the unique identification code of the item for which the tests are being defined. The item code is drawn from the *Item Master Data* screen.

Description: View the description of the item from the *Item Master Data* screen.

BP Code: Specify the unique identification code of the business partner (usually a customer.)

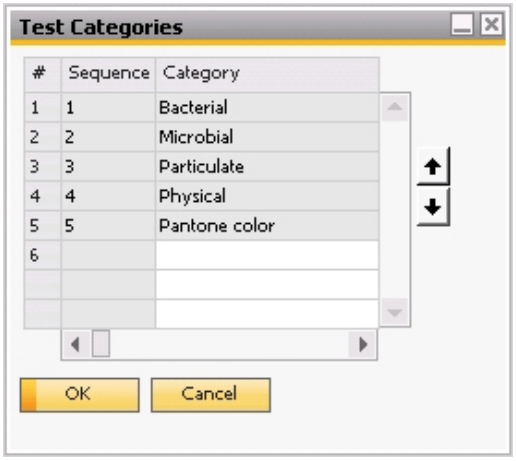
Name: View the name of the business partner corresponding to the *BP Code* selected.

Remaining field descriptions and use are the same as discussed earlier.

2.2 Test Categories

Use the *Test Category* screen to define groups or classifications for the test methods used in your business. You can always define new test categories as your business needs change.

Go To: Administration → Setup → Quality Control → Test Categories.



#: This column shows the serial number of the test.

Sequence: Use this system-generated field to view the sequence of test categories.

Category: Specify a unique name for the test category. For reporting purposes, the practical limit is 20 to 25 alpha-numeric characters.

Update: Click the *Update* button to save the record.

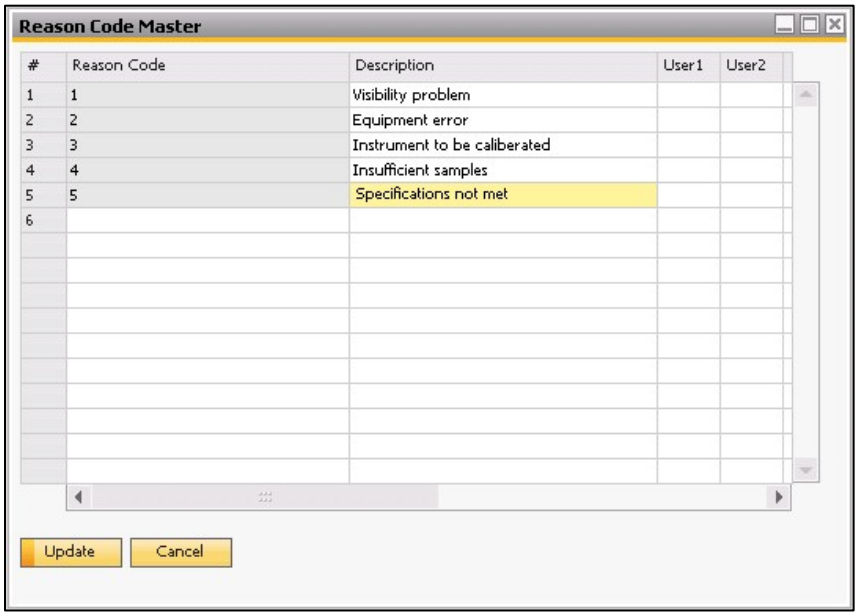
Cancel: Click the *Cancel* button to close the screen without saving the record.

Re-Sequence Button: Use this button to change the order of the lines or rows within the screen. To change the sequence, select a line and then click the up or down arrow to move it to the desired location.

2.3 Reason Codes

Use the *Reason Codes* screen to define the reasons for pass or failure of items during QC. The appropriate reason can then be chosen when processing a QC Order.

Go To: Administration → Setup → Quality Control → Reason Codes.



Reason Code: A unique identifier for the reason being added. The code can be alpha, numeric, or alpha-numeric, depending on your business needs.

Description: A description of or explanation for the reason code.

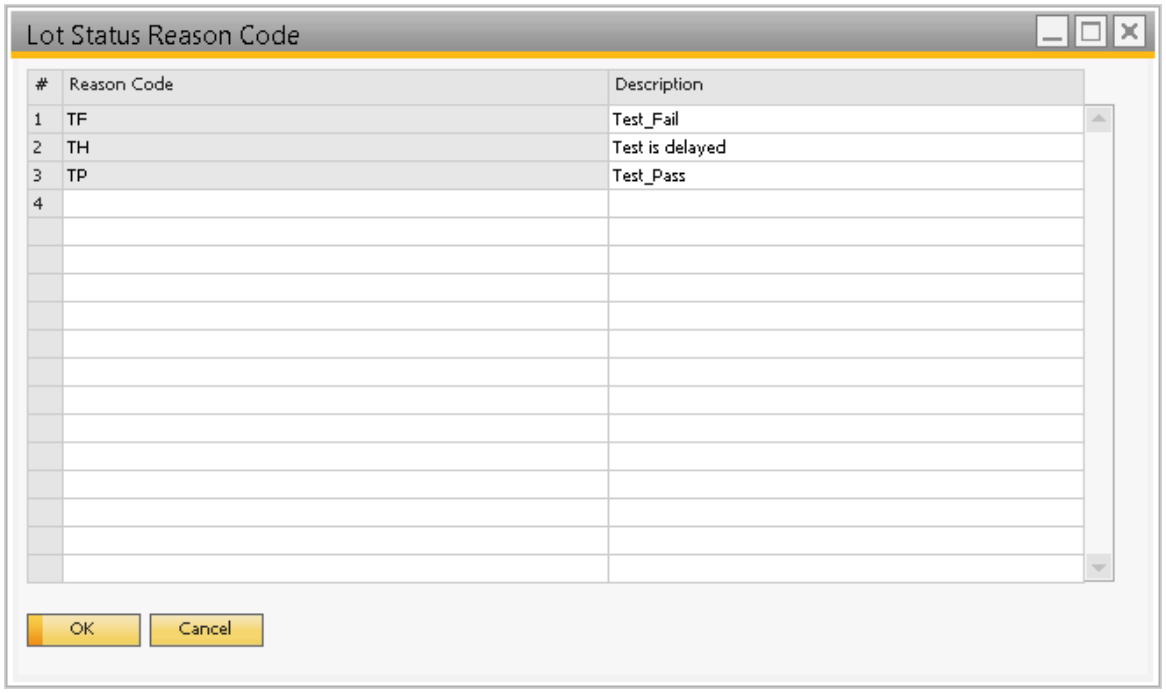
Update: Click the *Update* button to update the newly added reasons in the master.

2.3.1 Adding Reasons for QC Pass or Failure

1. Specify a unique code for each reason in the *Reason Code* column.
2. Enter the reasons in the *Description* column.
3. Click the *Update* button to add the reasons.

2.4 Lot Status Reason Code

On this screen you can maintain Reason Codes signifying the reason for changing the lot status of an item. The *Reason code* you maintain here can be selected on the *Change Lot Status* screen.



Reason Code: A unique identifier for the reason being added. The code can be alpha, numeric, or alpha-numeric, depending on your business needs.

Description: A description of, or explanation for, the reason code.

Update: Click the *Update* button to update the newly added reasons in the master.

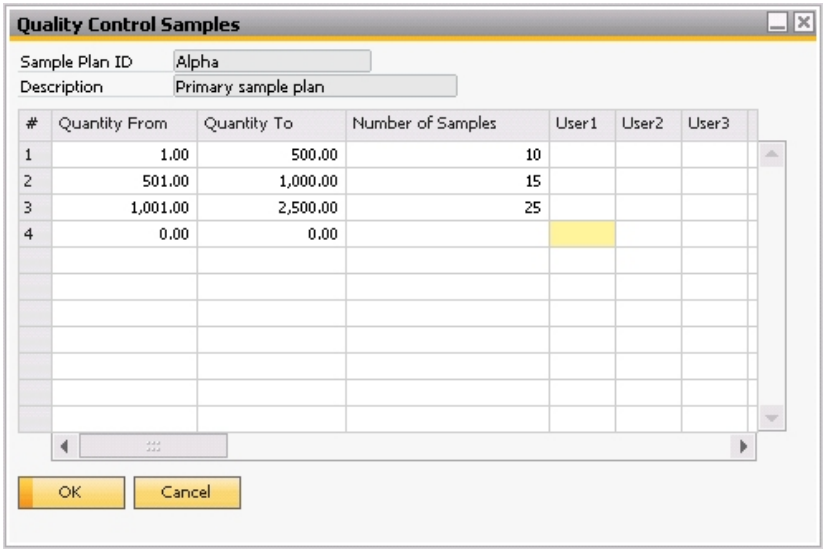
2.4.1 Adding Reasons for QC Pass or Failure

1. Specify a unique code for each reason in the *Reason Code* column.
2. Enter an appropriate reason in the *Description* column.
3. Click the *Update* button to add the reasons.

2.5 Quality Control Samples

The *Quality Control Samples* screen lets you define a sample plan to inspect a partial quantity of an item rather than the entire batch. You can define the number of samples that need to be drawn based on either receipt or production quantity. These values can be updated at any time as your business needs change.

Go To: Administration → Setup → Quality Control → Quality Control Samples.



Sample Plan ID: A unique ID for the sampling plan.

Description: A description of the sampling plan.

Quantity From and Quantity To: The range of quantities for which samples need to be taken.

Number of Samples: Specify how many samples need to be taken for a given quantity range.

OK: Click the *OK* button to save the record.

Cancel: Click the *Cancel* button to close the screen without saving the record.

2.5.1 Creating a QC Sampling Plan

1. Enter a unique sampling plan ID in the *Sample Plan ID* field.
2. Enter a description of the sampling plan in the *Sample Plan Description* field.

3. Define the sampling plan by specifying quantity intervals for drawing samples. (Each row pertains to an interval.)

4. Specify the quantity range from which sample(s) need to be drawn in the *Quantity From* and *Quantity To* fields.

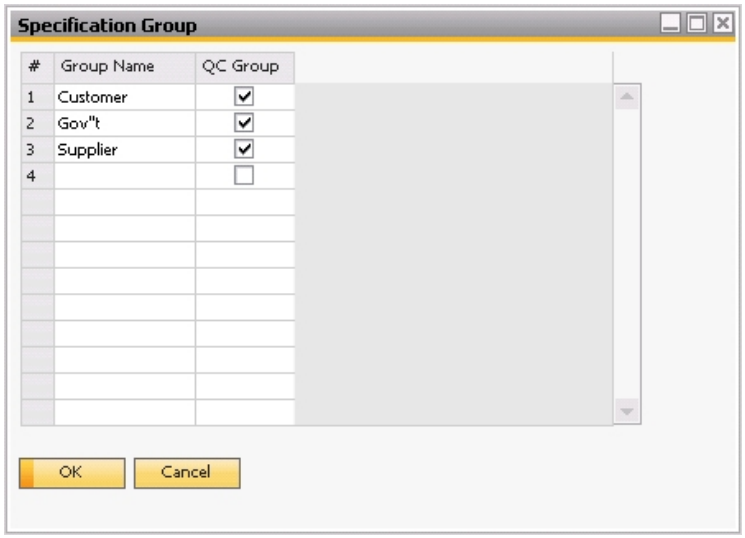
5. Specify the number of samples to be drawn in the *Number of Samples 1* field.

6. Click the *Add or Update* button to save the *QC Sample* record.

2.6 Specification Group

In the *Specification Group* screen you can define categories that help you classify the characteristics of the products, processes, or services required by your customers. The groups defined here would be listed in the *Group Name* drop-down on the *Specifications* screen.

Go To: Administration → Setup → Quality Control → Specification Group.



Group Name: The name of the specification group you need to create.

QC Group: Check this option if the respective group can be related to a QC test.

Update: Click the *Update* button to save the record.

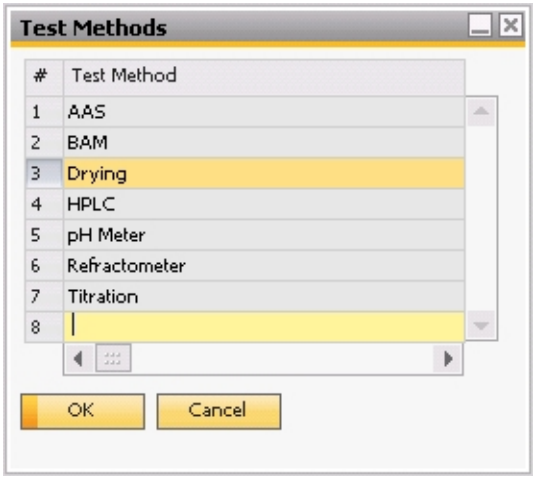
Cancel: Click the *Cancel* button to close the screen without saving the data.

3 QC TESTS

3.1 Test Methods (Without Approval Procedure)

Use the *Test Methods* screen to define the methods you normally use to perform QC tests.

Go To: Quality Control → Test Methods.



#: The serial number of the test method.

Test Method: A unique name that identifies the test method.

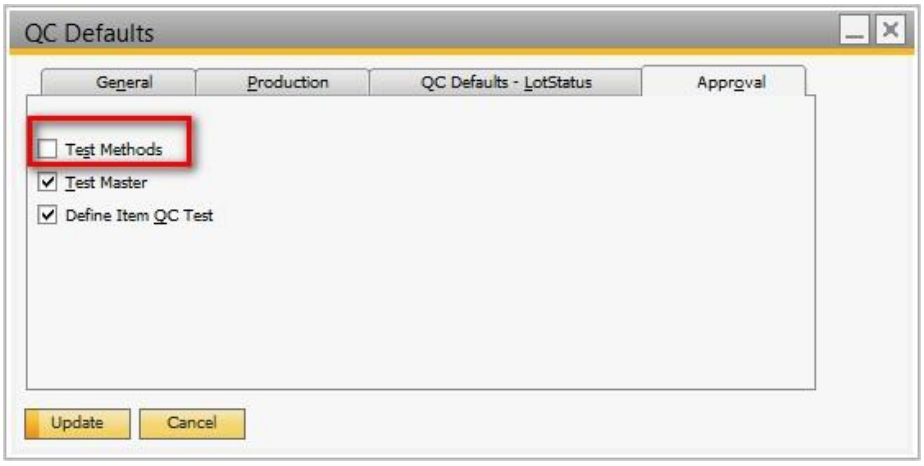
Update: Click the *Update* button to save the record.

Cancel: Click the *Cancel* button to close the screen without saving the record.

3.1.1 Defining Test Methods (Without Approval Procedure)

1. Use *QC Defaults* Screen to unselect Test Methods checkbox on QC Defaults at Approval Tab. Note that all "Pending" test methods must be approved or rejected before you can change this setting.

Go To: Administration → Setup → Quality Control → QC Defaults.



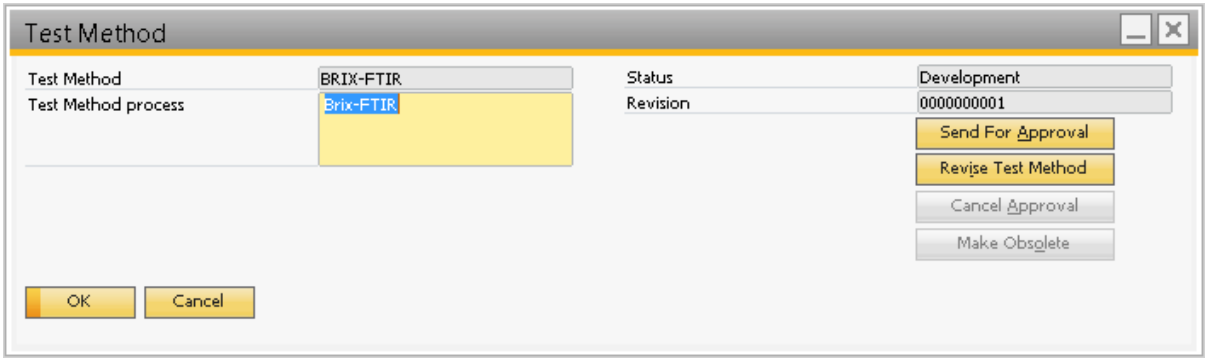
2. Enter a unique name to identify the QC test in the *Test Method* field.

3. Move to the next line to add another method. Repeat this step until you have added all the required test methods.

4. Click the *Update* button to save the record.

3.2 Test Methods (With Approval Procedure)

If the Approval procedure is implemented on Test Methods, the screen layout will be different. On the screen you can define a new test method and send it for approval. Only an *Approved* status Test Method will be available to use to perform a QC test.



Test Method: A unique name to identify the test method.

Test Method Process: Enter a description of the Test Method.

Status: Displays the current status of the Test Method.

Revision: Displays the revision number of the test method.

Send For Approval: Click this button to send the test method for approval.

Revise Test Method: Click this button to obtain a new development version of the test method. This button is enabled if the status is *Development, Approved, Cancelled* or *Obsolete*

Cancel Approval: Click this button to cancel the test method whose approval is pending.

Make Obsolete: Click this button to obsolete the current approved version of the test method.

Update: Click this button to save the record.

Cancel: Click this button to close the screen without saving the record.

3.2.1 Defining Test Methods (With Approval Procedure)

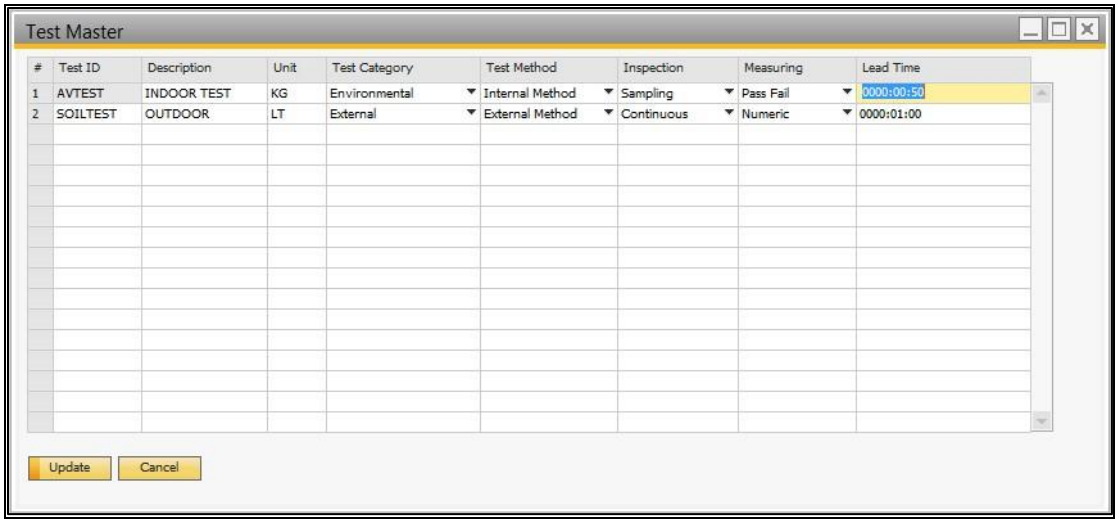
Use the following procedure to define test methods:

1. On the *QC Defaults* Screen, at *Approval* Tab, select the *Test Method* checkbox.
2. Open the *Test Method* screen.
3. Enter a unique name to identify a test process, in the *Test Method* field.
4. Enter the description of the specified test method in the *Test Method Process* field.
5. Click on *Send for Approval* button to send the test method for 'Approval'.
6. You can define a new development version of the test method by clicking *Revise Test Method* button.
7. You can cancel the approval request of test method by clicking the *Cancel Approval* button.
8. If the Test Method is approved and you want to make it Obsolete then click on *Obsolete* button.
9. Click the *Update* button to save the record.

3.3 Test Master (Without Approval Procedure)

Use this screen to define the various QC Tests that are performed in quality control. The result will be a library of tests that can be assigned to individual inventory items or to individual formulas.

Go To: Quality Control → Test Master.



Test ID: A unique key that identifies the test.

Description: The name or a description of the test.

Unit: The unit in which test results should be expressed. Note that the unit field here has nothing to do with the inventory unit of measure (UOM).

Test Category: The test category, such as physical or chemical, to which the test belongs.

The options listed in this drop-down menu are based on the categories defined in the *Test Category* screen.

Test Method: The pre-defined test procedure to be performed on items.

The options listed in this drop-down menu are drawn from the methods defined in the *Test Method* screen.

Inspection: Specify how material is to be inspected. Available options are:

- ***Continuous*:** The test is conducted on the entire quantity of the item (or on the entire lot of an item, if the item is lot tracked). This type of test assumes that the items undergoing the test are discrete in nature and each unit has to be inspected.
- ***Sampling*:** The test is applied on samples selected as per the desired sampling plan.

Measuring: Specify how the test results should be measured. Available options are:

- ***Alphanumeric*:** The test result is displayed as an alphanumeric value.
- ***Numeric*:** The test result is displayed as a numeric value.
- ***Pass/Fail*:** The test result can be either *Pass* or *Fail*.

Lead Time: The time needed to accomplish the quality control process. The format to enter the QC lead time is 'DDDD: HH: MM'.

Add/Update: Click the *Add/Update* button to save the record.

Cancel: Click the *Cancel* button to close the screen without saving the record.

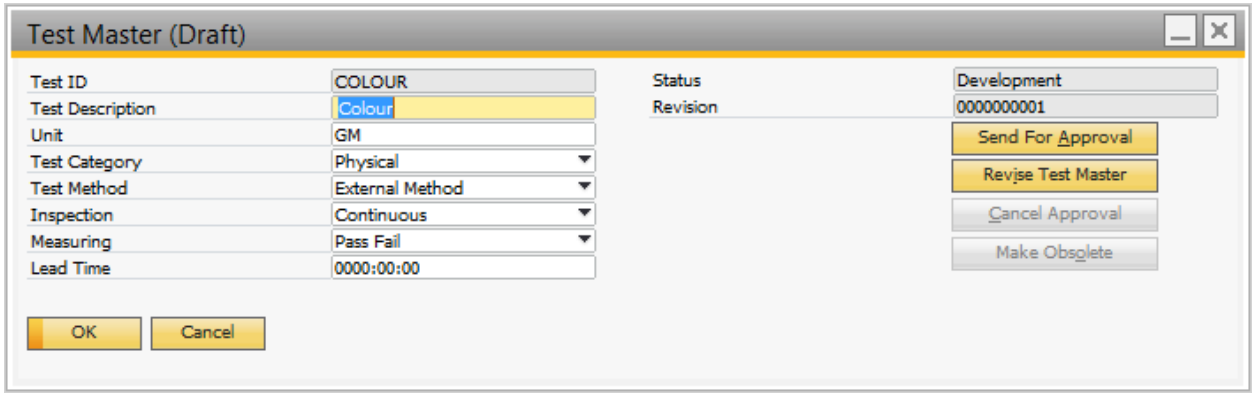
3.3.1 Defining a QC Test Master (Without Approval Procedure)

1. Open the *QC Test* screen.
2. Enter a unique code to identify the desired test in the *Test ID* field.
3. Enter a description of the test ID in the *Description* field, if needed.
4. Enter the desired test unit at the *Unit* field, if needed.
5. Choose the appropriate type of test in the *Test Category* field.
6. Select the appropriate test method in the *Test Method* field.
7. Select the appropriate inspection type in the *Inspection* field. Available options are *Continuous* or *Sampling*,
8. Select the appropriate test measurement in the *Measuring* field. Available options are *Pass/Fail*, *Numeric*, or *Alphanumeric*.
9. Enter the lead time in 'DDDD: HH:MM' format.
10. Repeat these steps for all the tests you wish to define.
11. Click the *Add* or *Update* button to save the record.

3.4 Test Master (With Approval)

You can define a QC test and have it approved by an authorized user before using it to perform QC. If the Approval procedure is applied to the Test Master screen then, for every test you define on the screen, approval is required.

Only Tests with an *Approved* status will be available to perform Item QC.



Test ID: A unique key that identifies the test.

Description: The name or a description of the test.

Unit: The unit in which test results should be expressed. Note that the unit field here has nothing to do with the inventory unit of measure (UOM).

Test Category: The test category, such as physical or chemical, to which the test belongs.

The options listed in this drop-down menu depend on the categories defined in the *Test Category* screen.

Test Method: The pre-defined test procedure to be performed on items.

The options listed in this drop-down menu are drawn from the methods defined in the *Test Method* screen.

Inspection: Specify how material is to be inspected. Available options are:

- ***Continuous*:** The test is conducted on the entire quantity of the item (or on the entire lot of an item, if the item is lot tracked). This type of test assumes that the items undergoing the test are discrete in nature and each unit has to be inspected.
- ***Sampling*:** The test is applied on samples selected as per the desired sampling plan.

Measuring: Specify how the test results should be measured. Available options are:

- ***Alphanumeric*:** The test result is displayed as an alphanumeric value.
- ***Numeric*:** The test result is displayed as a numeric value.
- ***Pass/Fail*:** The test result can be either *Pass* or *Fail*.

Lead Time: The time needed to accomplish the quality control process. The format to enter the QC lead time is 'DDDD: HH: MM'.

Status: Displays the current approval status of the item test.

Revision: Displays the revision number of the test.

Send for Approval: Click this button to send the test for approval.

Revise Test Master: Click this button to obtain a new development version of the test. This button is enabled if the status is *Development, Approved, Cancelled* or *Obsolete*

Cancel Approval: Click this button to cancel the item test whose approval is pending.

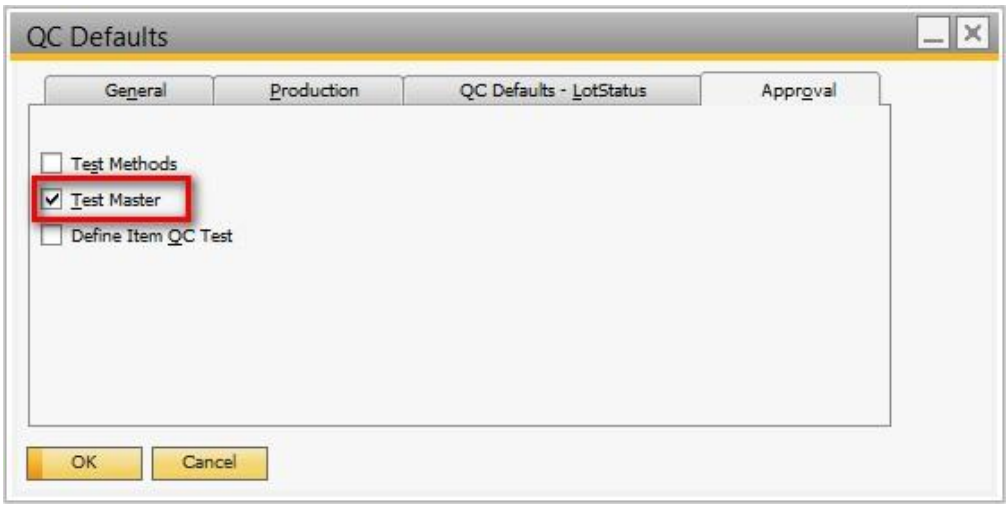
Make Obsolete: Click this button to obsolete the current approved version of the test.

Add/Update: Click this button to save the record.

Cancel: Click this button to close the screen without saving the record.

3.4.1 Defining a QC Test Master (With Approval Procedure)

1. On the *QC Defaults* Screen, at the Approval tab, select the *Test Master* Checkbox.



Go To: Quality Control → Test Master

2. Open the *QC Test Master* screen.
3. Enter a unique code to identify the desired *Test ID*.
4. Enter a description of the *Test ID* in the *Description* field, if needed.
5. Enter the desired test unit at the *Unit* field.
6. Choose the appropriate type of test in the *Test Category* field defined at *Test Category* screen.
7. Select the appropriate test method as defined on *Test Method* Screen.
8. Select the appropriate inspection type in the *Inspection* field. Available options are *Continuous* or *Sampling*.
9. Select the appropriate test measurement in the *Measuring* field. Available options are *Pass/Fail*, *Numeric*, or *Alphanumeric*.
10. Enter the lead time in 'DDDD: HH:MM' format.
11. Click the *Add* or *Update* button to save the record.
12. Click *Cancel* to discard the changes.

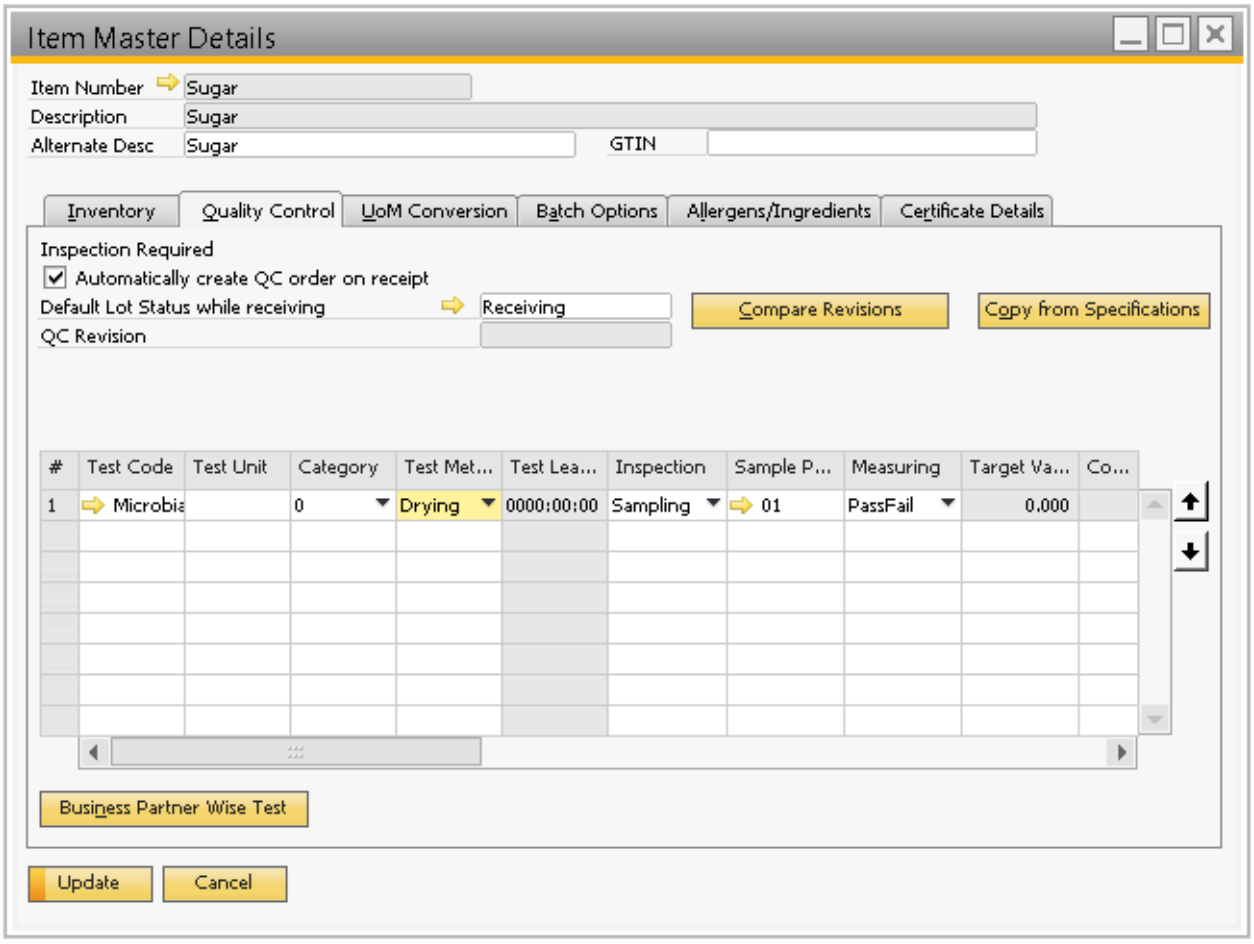
3.5 Assigning QC test to Inventory Items

Go To: Inventory → Item Master Details.

Enter all or part of the Item Number or Description and click 'Find' to recall your Item record.

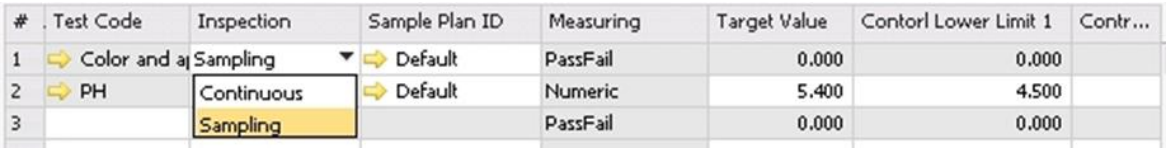
Right-click anywhere in the *Record* screen and choose *Item Master Details*.

On the *Quality Control* tab, enter the QC Tests appropriate for this item, together with their target values if you choose Numeric as the measuring type.

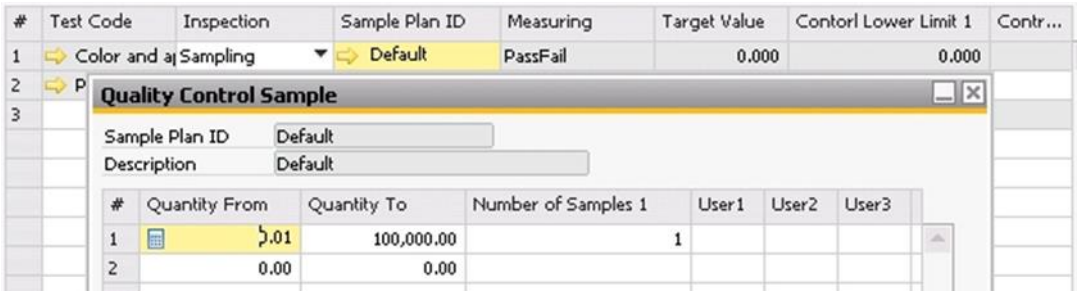


The defaults you established earlier for each *Test Code* can be changed here, except for the *Measuring* default.

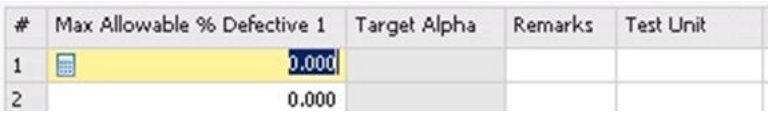
In the *Inspection* column, select the *Continuous* or *Sampling* option. If the value in the *Measuring* column is *Numeric*, enter the appropriate values in the *Target Value*, *Control Upper Limit*, and *Control Lower Limit* columns.



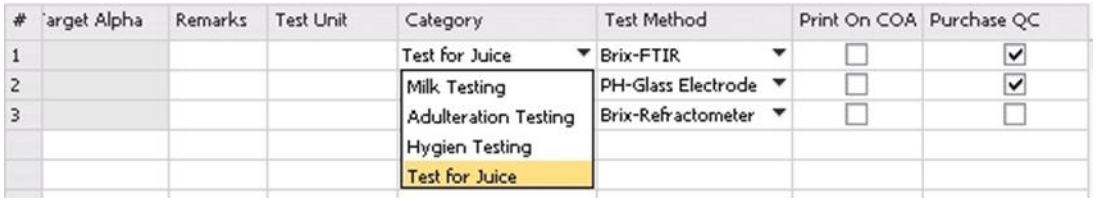
Change or select the Sample Plan.



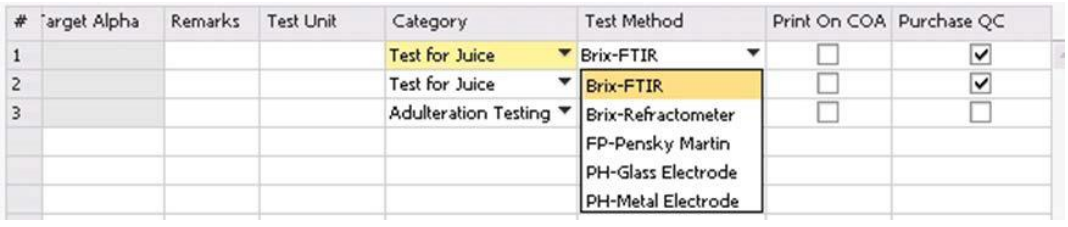
Select a value for the *Maximum Allowable % Defective* field. Enter a value in the *Target Alpha* field when the *Measuring* type is alpha-numeric. Enter any Remarks and a Test Unit in the appropriate fields, if required.



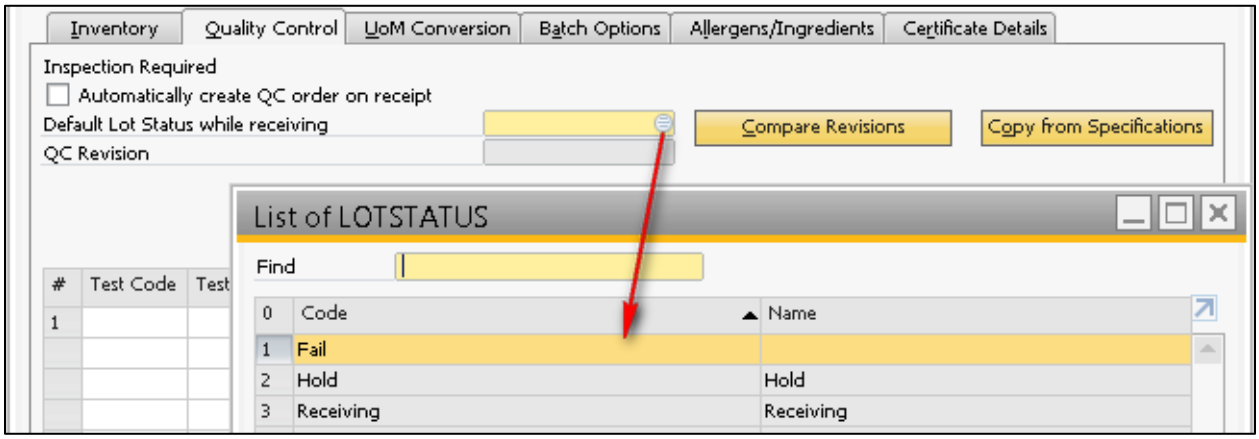
Change or select a Category.



Change or select a Test Method.

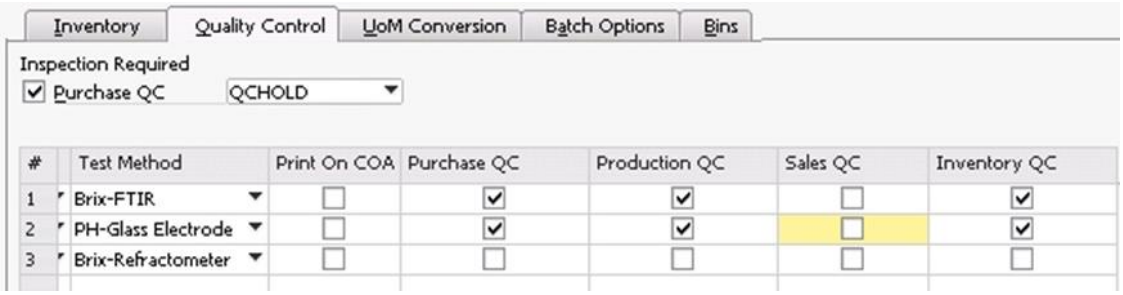


When this item is to be tested on Purchase Receipt, check the box labeled *Automatically Create QC order on Receipt*

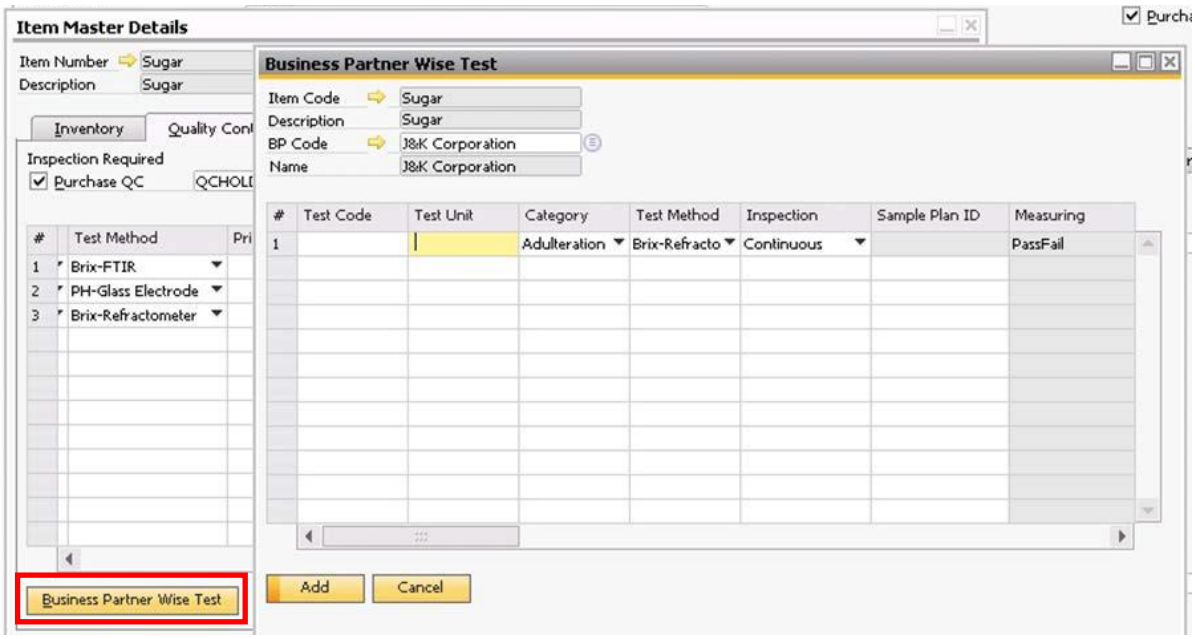


The software will create a QC Order when the Goods Receipt PO is processed. The item cannot be further processed until it passes the QC Test.

You also define whether the item must be tested at other business process steps, which tests should be carried out at each step, and which test results should print on a Certificate of Analysis (COA) Report. For example, all tests may be required when an item is first received, but only a few key tests may be required for an inventory QC re-test.



A further set of tests can be assigned for a specific business partner. Entry is exactly the same as for normal *QC Test* entry, except a Business Partner is selected. These tests will only apply for documents generated for that business partner.



When you have finished entering *QC Tests* for this item, click 'OK' to accept them and close the Item *Master Details* screen.

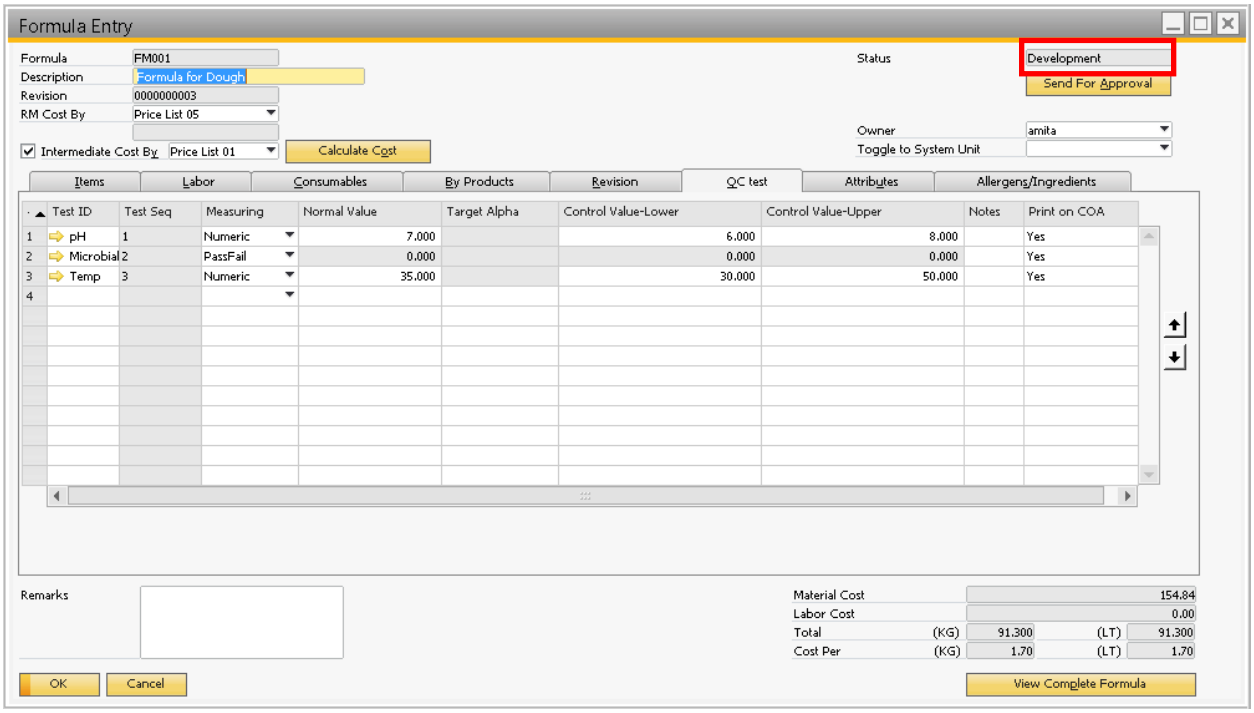
3.5.1 Assigning QC Tests to Inventory Items

1. Enter all or part of the Item Number or Description, then click the *Find* button to recall the record.
2. Right-click anywhere in the record screen and choose *Item Master Details*.
3. Select the *Quality Control* tab.
4. If this test is specific to a business partner, click the *Business Partner Wise Test* button. Enter the business partner code and continue with column data entry. (Sequence will vary from below.)
5. Enter the QC Test for the item in the *Test Code* column.
6. Select the Inspection Method in the *Inspection* column.
7. Select the Sample Plan ID in the *Sample Plan ID* column.
8. Define a Maximum Allowable % Defective.
9. Define a target value if the Measuring option is *Alpha-Numeric*.
10. Optional: Add any remarks and a test unit.
11. Verify/change the Test Category and Test Method.
12. Select *Print on COA* to print QC test results on the Certificate of Analysis.
13. Select *Purchase QC* to require this test when the item is received from a vendor.
14. Select *Production QC* to require this test when a batch for this item is closed/partially closed.
15. Select *Sales QC* to require this test when the item is shipped to a customer.
16. Select *Inventory QC* to require this test when the item is in the storeroom.
17. Click the *Update* button to save your work.

3.6 Assigning QC Tests to Formulas

Enter all or part of the Formula Key or Description, and then click 'Find' to recall the record. When the desired record appears, select the *QC Test* tab.

Go To: Formulation → Formula Entry.



Test ID: Click in this field, then press 'Tab' to display valid Test IDs. When you are editing a value that has already been entered, click the golden arrow to display the list of available tests.

Test Seq: This is the sequence in which tests were entered. To change the sequence, use the up and down arrows on the right-hand edge of the grid.

Measuring: Accept or change the value in the *Measuring* field to *PassFail*, *Numeric*, or *Alpha-Numeric* using the drop-down box.

Normal Value: The expected value if the measurement is numeric.

Target Alpha: Click in this field to enter target alpha value.

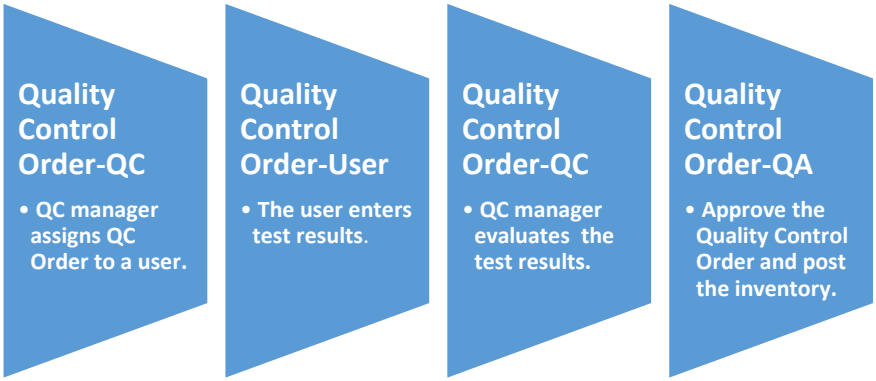
Control Value Lower: Click in this field to enter control lower value.

Control Value Upper: Click in this field to enter control upper value.

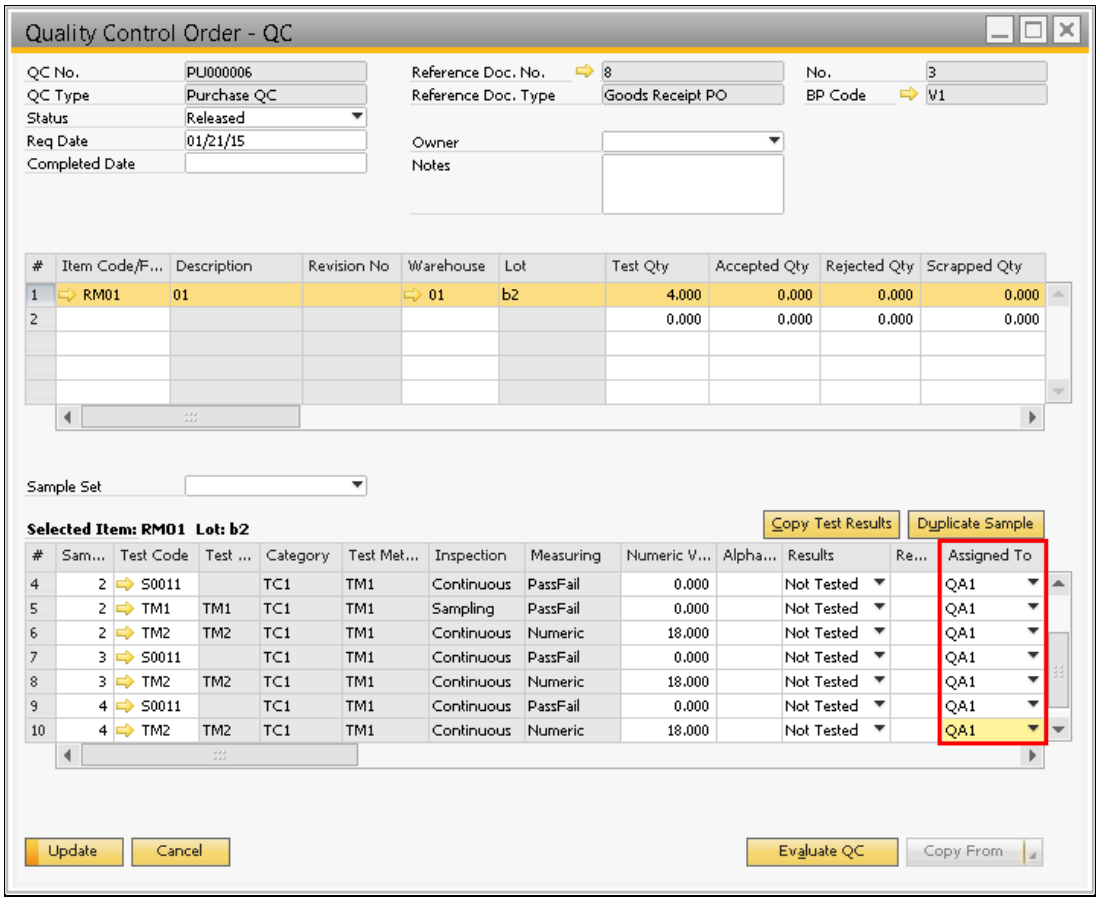
Print on COA: Indicate whether the test result should print on a Certificate of Analysis.

4 QUALITY CONTROL ORDER PROCESS FLOW

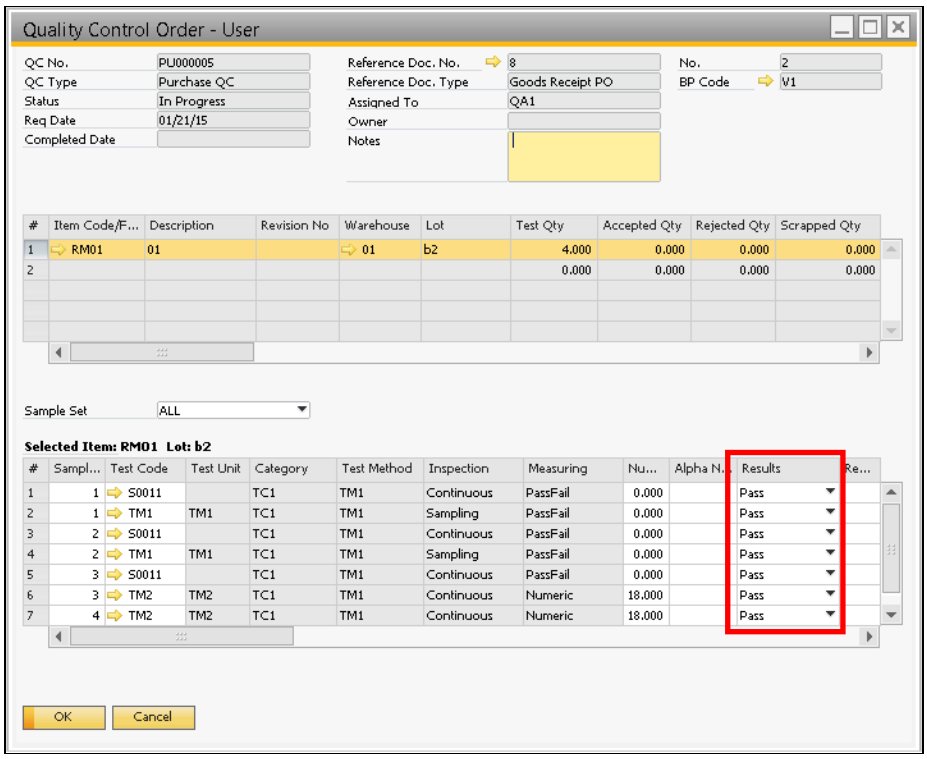
The Quality Control Order in BatchMaster ERP is a multi-step procedure that involves order processing, evaluation, and approval, as discussed below.



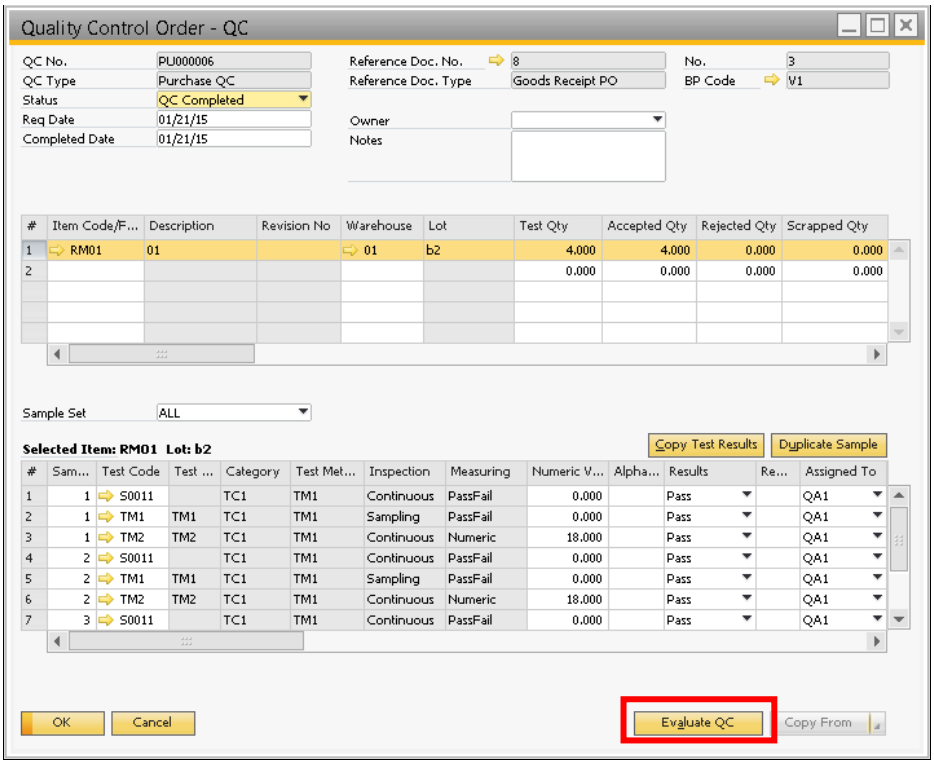
1. The QC Manager analyzes the QC order on the *Quality Control Order – QC* screen and then assigns the order to the QC technician.



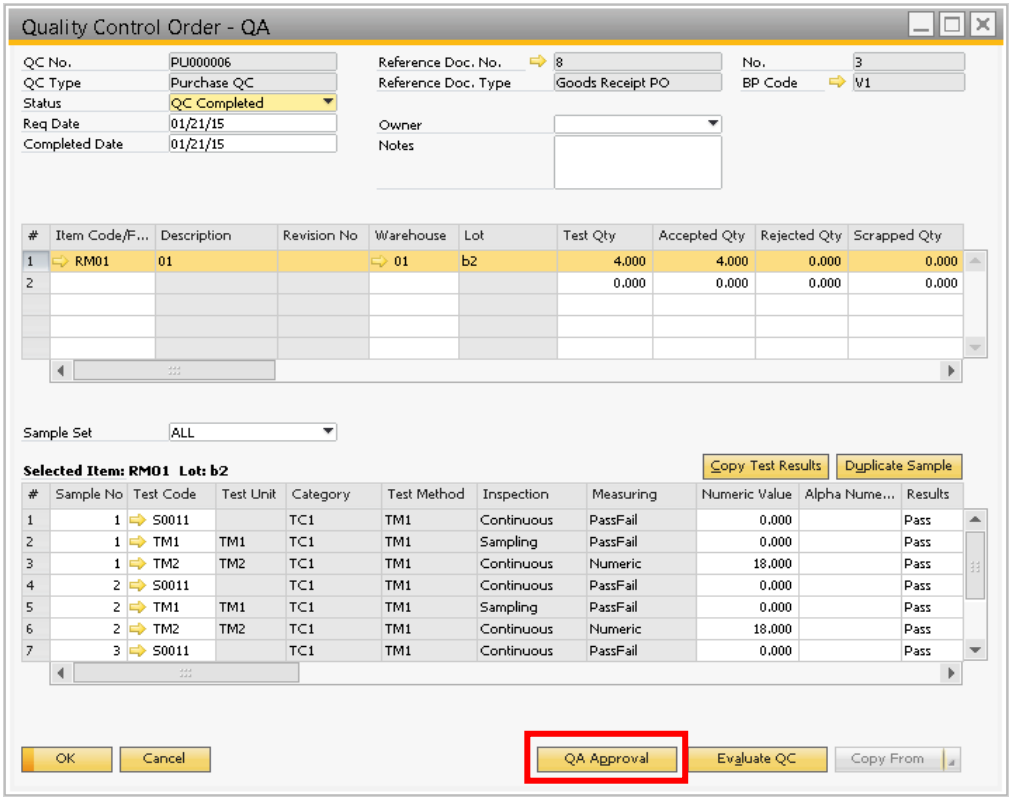
2. The technician opens the order on the *Quality Control Order – User* screen to enter test values.



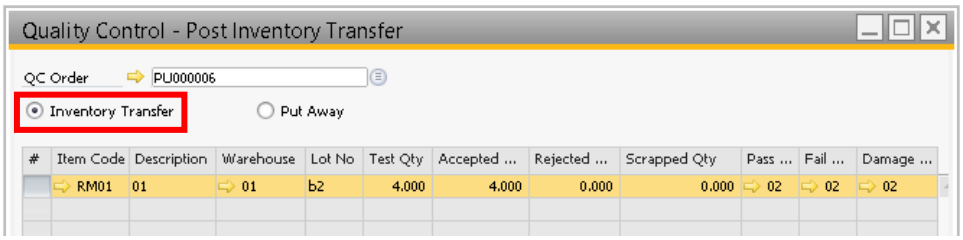
3. The QC Manager reviews and evaluates test results on the *Quality Control Order – QC* screen.



4. Using the *Quality Control Order – QA* screen, the QA manager can analyze the QC test results and then approve or reject them.



5. Finally, use the *Post Inventory Transfer* screen to transfer inventory to an appropriate warehouse/bin.

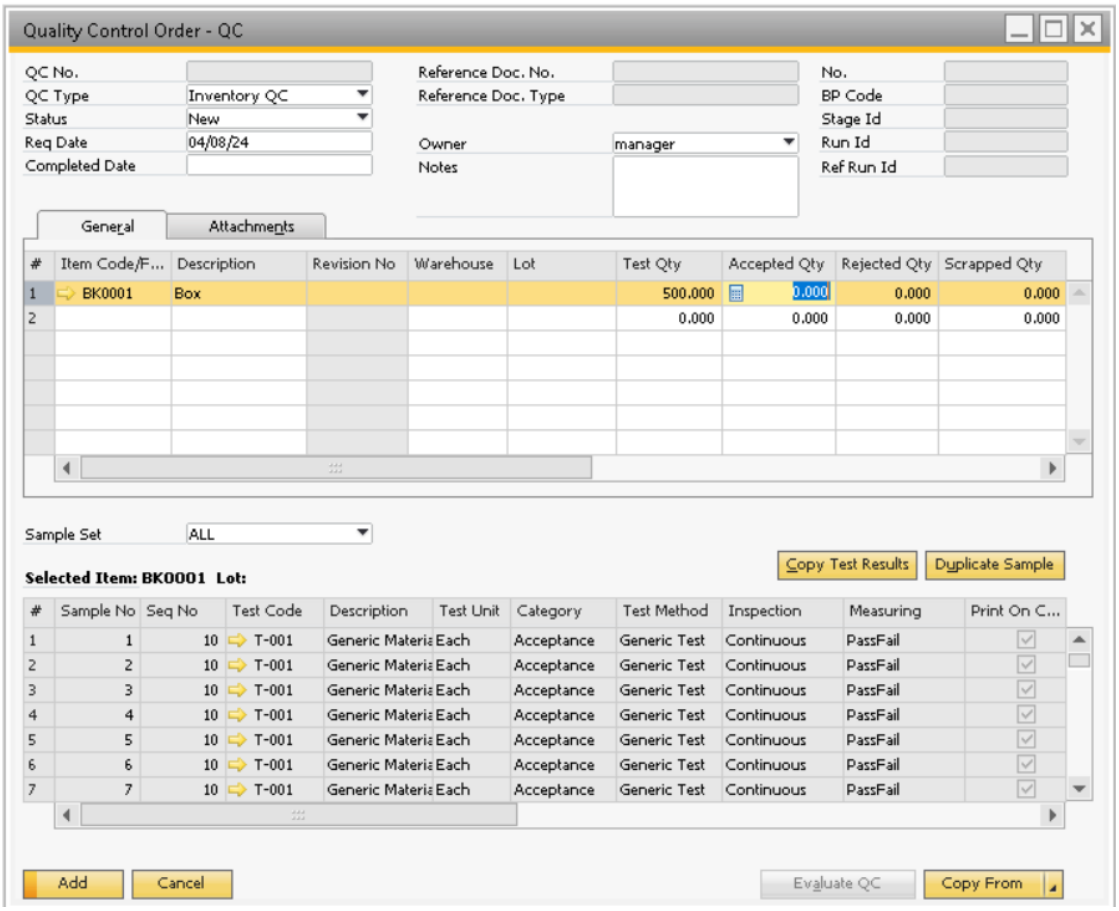


These functions are described in detail in the following sections.

If your business practices do not require or support the division of functionality, a QC Order could be created, released, have results entered, and be completed all within the *Quality Control Order – QC* function.

4.1 Quality Control Order – QC

Use the *Quality Control Order – QC* screen to create a QC document and (optionally) assign it to a specific user. Remember, if no user is specified, test results are also entered here, and the QC Order can then be flagged as 'completed'.



QC No: Displays the auto-generated unique identification key for the QC order.

QC Type: Specify the QC order type. Available options are:

- ***Production QC*:** Use this option for testing work in progress.
- ***Purchase QC*:** Use this option for testing purchased raw materials/ingredients at time of receipt. The GRPO screen in SAP B1 includes a feature allowing navigation to the Purchase QC document. Please Refer Section Added Feature to GRPO Screen in SAP B1.
- ***Sales QC*:** Use this option for testing finished goods prior to shipment.
- ***Inventory QC*:** Use this option for re-testing inventory items, if required. This could be raw materials or intermediates before issuing them for a batch, re-testing items close to expiry, or

testing of returned goods to ascertain whether they can be resold, reworked, or should be scrapped.

The system will automatically populate this field when you use the *Copy From* button.

Copy From: Click the *Copy From* button to choose the document type. Available options are *Production Order*, *Sales Order*, or *Goods Receipt PO.* Based on the option that you select here, you can view a list of records from which you can choose.

When one of these options is selected in the *Copy From* field, values are added to the *QC Type*, *Status*, *Req Date*, *Reference Doc. No.*, *Reference Doc. Type*, *No.*, and *Card No*. fields by default. The default values of the *Status* and *Req Date* fields are New and the current server date, respectively.

Status: The current status of the QC order. Available options are:

- ***New:*** The order has been created but not released. Test results cannot be entered in a QC order with New status.
- ***Released*:** Select this status when you are ready to enter test results.
- ***In Progress*:** You have entered the test results but no decision has been made on the item.
- ***QC Completed*:** All QC test results have been entered and evaluated.
- ***Closed*:** Select this status if you are ready to close the document.
- **Canceled**: Select this status to cancel a QC document of *New* or *Released* status.

Req Date: Specify the date on which test results are required. By default, this field is auto-populated with the date on which the QC order was created.

Completed Date: Specify when QC was actually completed. When this field is left blank, the system will auto-populate it with the date the document was closed.

Reference Doc No.: Displays the reference document number associated with the QC order. This number can be either a PO number (for Purchase QC) or a SO number (for Sales QC).

Reference Doc Type: Displays the type of the reference document. Available options are:

- *Goods Receipt PO.*
- *Production Batch.*
- *Sales Order.*

Owner: Specify the user who is responsible for the document. This is an optional field.

Notes: Enter any remark or comment pertaining to the QC order.

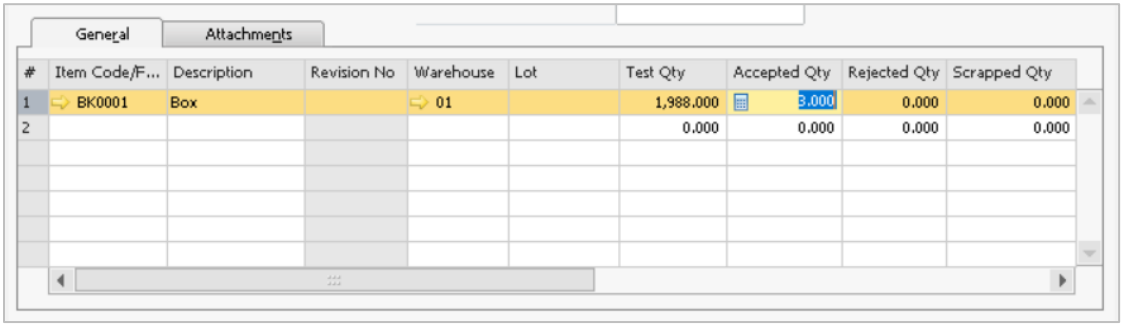
No.: Displays the number of times QC has been performed against a document.

Normally you would create a single QC document for a batch or a purchase order. If you need to test it a second time, you can always create another QC document.

BP Code: Displays the business partner associated with the QC order.

The vendor code is displayed here for purchase QC, and the customer code is displayed for sales QC.

General Tab



The table in the top grid displays all items and formulas (in case of production QC) that need to be tested. The system adds a line per lot of the item that needs to be tested. If you created the document using the *Copy From* feature, then the system would automatically populate this table based on the selected document.

Item Code/Formula ID: Displays the formula or item for which tests need to be performed. For inventory QC, you need to manually select the item.

Description: Displays the description of the item or formula.

Revision No.: Displays the revision number of the formula which is being tested, if applicable.

Warehouse: Displays the item's warehouse.

Lot: The lot that is being tested, if the item is serial/lot tracked.

Test Qty: The quantity for which testing is required.

Accepted Qty: Displays the quantity accepted after the evaluation of test results. Can be over-ridden, if needed.

Rejected Qty: Displays the quantity rejected after the evaluation of test results. Can be over-ridden, if needed.

Scrapped Qty: Displays the quantity scrapped after the evaluation of test results. Can be over-ridden, if needed.

QC Decision: The overall QC decision for the test. You can override the system-calculated decision, if desired.

QC Status: The status of the QC order for this line item.

QC Lot Decision: The inventory status of this lot.

Item/Formula (not shown)**:** Specifies whether an item or a formula is being tested. Formulas are applicable only for production QC tests.

Pass Warehouse (not shown)**:** The warehouse where QC-passed materials will be transferred.

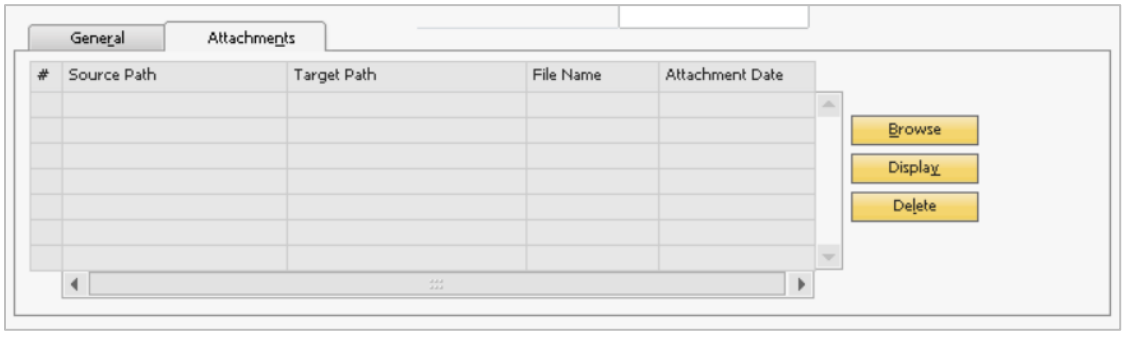
Fail Warehouse (not shown)**:** The warehouse where QC-failed material will be transferred.

Damage Warehouse (not shown)**:** The warehouse where damaged material will be transferred.

Reason Code (not shown; optional)**:** The reason for the pass or fail decision. The value in this field will be copied to the user-defined field *Reason Code* on batch or serial details.

Detail: Enter any comments for the lot that is being tested. The value of this field will be copied to the *Detail* field of the *Batch Details* screen.

Attachments Tab



Source Path: Use this field to specify the path to access the document. It is recommended to specify a network path so that the attachment is accessible to other users as well.

Target Path: Use this field to specify the path where you want to store the attached file.

File Name: Use this field to view the file name of the attached document.

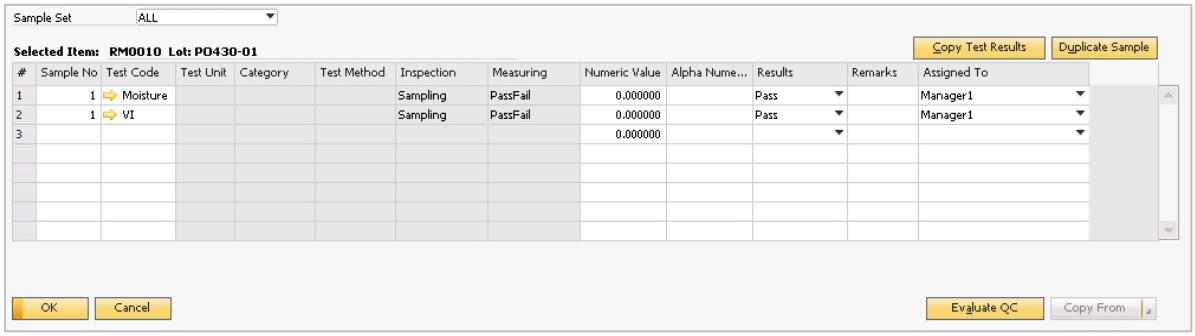
Attachment Date: Use this field to view the date on which the document is attached.

Browse: Choose this button to select the document.

Display: Choose this button to display the document.

Delete: Select a row and choose this button to delete the attachment.

Lower Grid



Copy Test Results Button: This feature is helpful when you are testing more than one lot of an item and want to copy the test results for one lot to all the lots. In such a case, select the lot that has test results entered in the top grid and click the *Copy Test Results* button. The system will copy the test results of the selected lot to all other lots of the same item.

Duplicate Sample Button: Use this function when you wish to do further testing before evaluating the QC Order. To create a duplicate sample, select a lot in the top grid, then select a sample number from the *Sample Set* field and click the *Duplicate Sample* button. You can now enter secondary testing results without having to open a new QC order.

If you created the QC document using the *Copy From* button, then the system would automatically populate the item, lot #, and test based on the sampling plan. You can add more tests manually, if required.

The system copies the item QC tests defined on the *QC* tab of the *Item Master Details* screen. Only those tests that are relevant for the given document type will be copied.

Sample Set: The sample set that needs to be tested.

Sample No: This field displays the sample number. When you add a test manually, you need to enter the relevant sample number in this field.

Test Code: The unique code for the QC test applied to the item or formula.

When you select the desired test code, the values of the *Test Unit*, *Category*, *Test Method*, *Inspection*, and *Measuring* fields are automatically populated by the system.

Test Unit: The test unit in which the QC test results are to be entered. This has no relation to inventory units of measure.

Category: The QC test category.

Test Method: The test method used to perform the QC test.

Inspection: The Inspection method. Available options are *Sampling* or *Continuous.*

Measuring: The method by which the test result is to be obtained. Available options are *Pass/Fail*, *Numeric*, or *Alpha Numeric.*

Numeric Value: When the test result is reported numerically, you must enter a numeric result for the QC Test. If the result value is within tolerances, the system would automatically mark the QC Test as Pass. You can override this value, if needed.

Alpha Numeric: When the test result is reported alpha-numerically, you must enter an alpha-numeric result for the QC Test.

Results: Enter and/or verify the QC test result (*Pass* or *Fail*) based on the numeric or alpha-numeric value obtained.

The system will automatically evaluate a numeric test result. When the test value is within tolerances, the system will automatically mark the test result as *Pass*. When the test value is not within tolerances, then the system will automatically mark the test result as *Fail*. You can always override system-calculated results, if needed.

Remarks: Enter any comments about the test.

Assigned To (optional)**:** Assign the QC tests to the desired user. A user can access only those tests that have been assigned to him/her.

Add/Update/OK: Click the *Add/Update* button to save the record. Once the records are saved, or when older records are retrieved, the caption on the button changes to *OK*.

Cancel: Click the *Cancel* button to close the screen without saving the record.

Evaluate QC: Click this button to evaluate the QC results. The system determines QC results based on how many samples have passed the QC test. The system-generated result can be overridden, if desired.

The *Evaluate QC* button can be used only after the status of the order has been changed to *Released* and test results have been entered.

4.1.1 Working with the Quality Control Order – QC Screen

4.1.1.1 Creating a New QC Order

1. Open the *Quality Control Order – QC* screen in the Add mode.
2. Specify the type of the QC order in the *QC Type* field. Available options are *Production QC*, *Purchase QC*, *Sales QC*, and *Inventory QC*.
3. Use the *Find* window to select the desired document from the list.
4. You can also use the *Copy From* button in the lower right corner of the screen to copy data from the *Production Order*, *Sales Order*, or *Goods Receipt PO* fields.
5. Specify the date on which the test results are required.
6. Specify the date on which the order was completed (if the order is complete) in the *Completed Date* field.
7. Specify the user responsible for the order in the *Owner* field (optional).
8. Click the *Add* button to add the record.
9. Change the order status from New to Release to enter the test results.
10. Select the desired sample set in the *Sample Set* field and choose the sample that needs to be assigned to the user for testing.
11. On the *Attachment* tab click the *Browse* button to attach a document.
12. Click the *Update* button to save the record.

4.1.1.2 Assigning QC Order to a User (Optional Function)

1. From the *Find* window, select the document that needs to be assigned to the user. Alternatively, use the *Copy From* button in the lower right corner of the screen to copy data from the *Production Order*, *Sales Order*, or *Goods Receipt PO* fields.

   The system defaults the item/formula for which the QC test is applicable and ready to be assigned to the user.
2. In the *Owner* field, specify the user who is responsible for the order.
3. Select the item/formula that needs to be assigned to the user for testing.

4. Change the order status from New to Released using the drop-down menu next to the *Status* field.

5. Select the desired sample set in the *Sample Set* field, and choose the sample that needs to be assigned to the user for testing.

6. In the *Assigned To* field, specify the user to whom you need to assign the QC test.

7. Click the *Update* button to save the record.

4.1.1.3 Evaluating a QC Order

1. Select the document that needs to be evaluated from the *Find* window, or use the *Copy From* button in the lower right corner of the screen to copy data from *Production Order*, *Sales Order*, or *Goods Receipt PO* fields.

   When you use the *Copy From* function, the system will default the item/formula for which the QC test is applicable.

2. Select the sample/formula line from the upper grid, and view the test result values in the lower grid.

3. Modify the test results with respect to item/formula samples, if required.

4. Use the *Duplicate Sample* button to create a duplicate of a sample selected in the lower grid with a new sample number, if need be.

5. When two or more lots of an item are subjected to QC tests in a QC order, you can use the *Copy Test Results* button to copy the test results from one lot to another lot.

6. Click the *Update* button to update the test results.

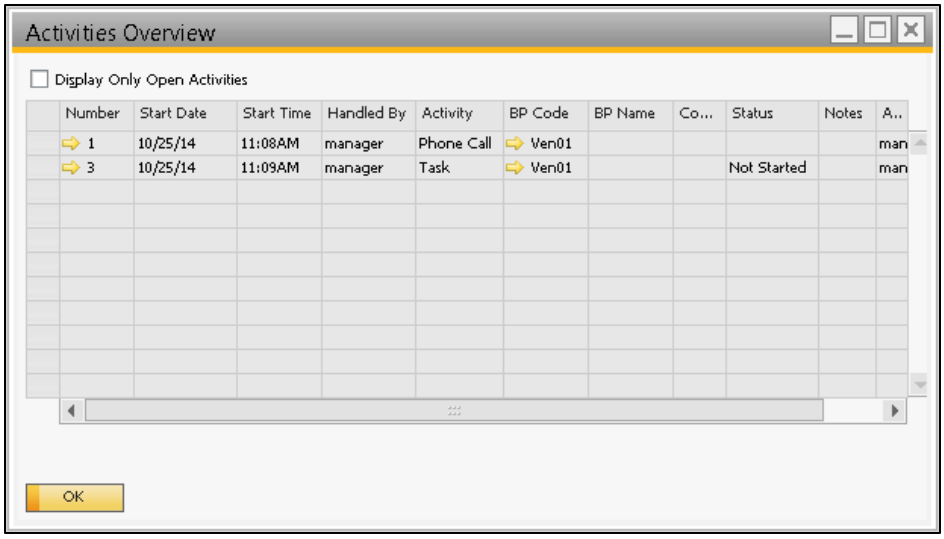
7. Use the *Evaluate QC* button to evaluate the test results. Respective test results will be updated in the upper grid.

8. Click the *Update* button to save the record.

4.1.2 GoTo Functions

4.1.2.1 Related Activity

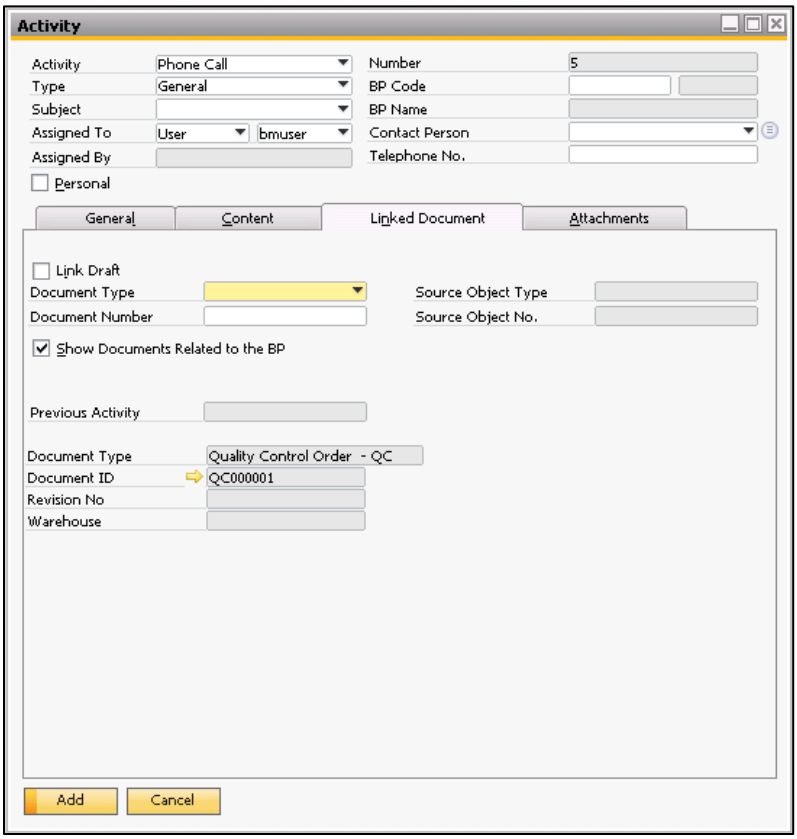
Select the *Related Activity* option under the *GoTo* menu to access the *Activities Overview* screen, which contains details of each activity.


Activities Overview
Display Only Open Activities
Number
Start Date
Start Time
Handled By
Activity
BP Code
BP Name
Co...
Status
Notes
A...
1
10/25/14
11:08AM
manager
Phone Call
Ven01
man
3
10/25/14
11:09AM
manager
Task
Ven01
Not Started
man
OK

4.1.2.2 New Activity

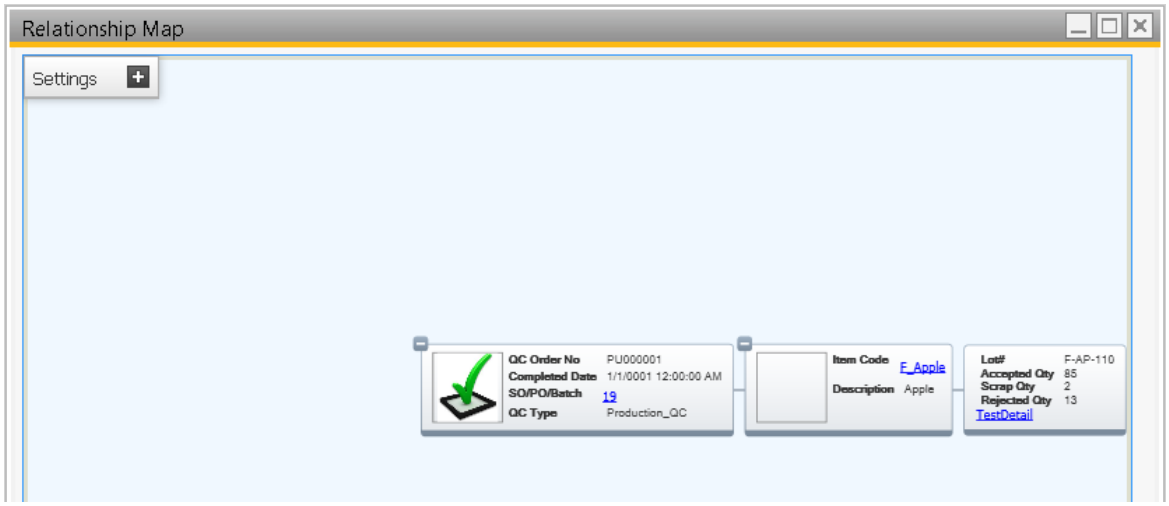
Select the *New Activity* option to go to the *Activity* screen. Use this option to create activities you want to tie to a QC order. The system will auto-populate the values in the *Document Type* and *Document ID* fields. A business partner code is required, so you will want to define a code for your company (to use with internal activities.)

When you access the *Activity* screen using the *GoTo* function, the system will auto-populate the values in the *Document Type* and *Document ID* fields.



4.1.2.3 Relationship Map

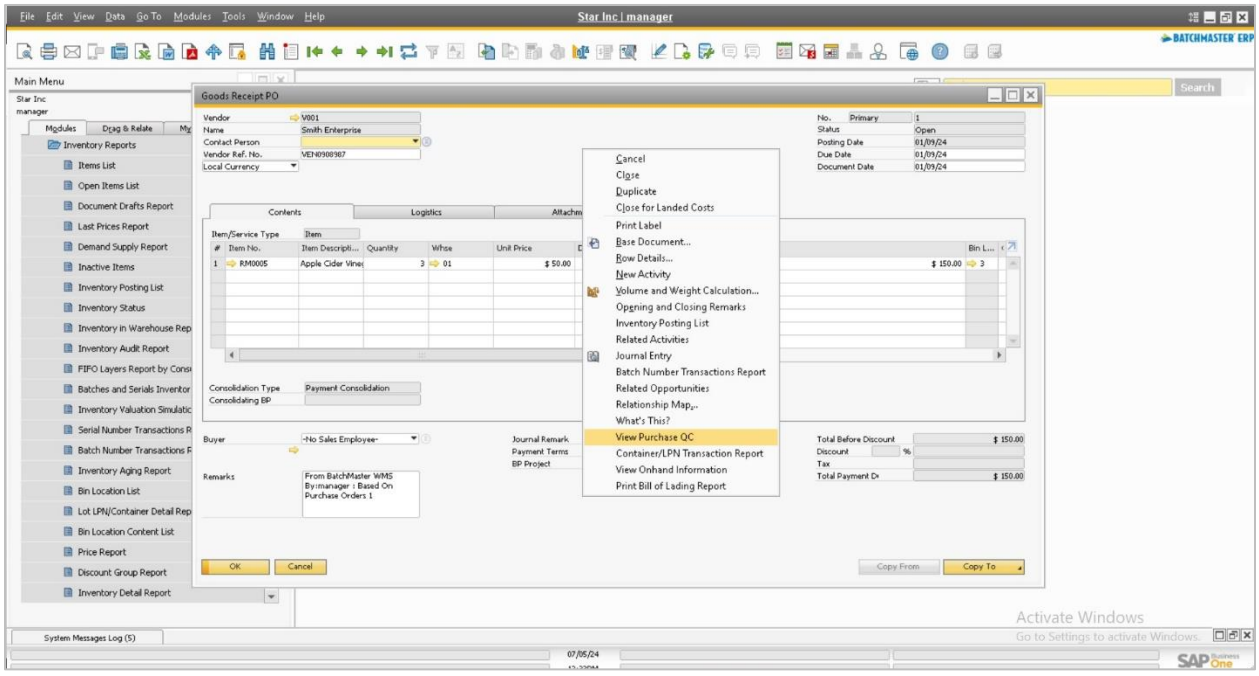
A relationship map for QC is a pictorial representation of all the critical information about the QC document. The relationship map for a QC order displays the QC order number, QC type, completion date, and the associated document number (sales order, purchase order, or batch).



Click the '**+**' button on the main entity to view additional information (i.e., the item and the item lot subjected to QC, and the QC results).

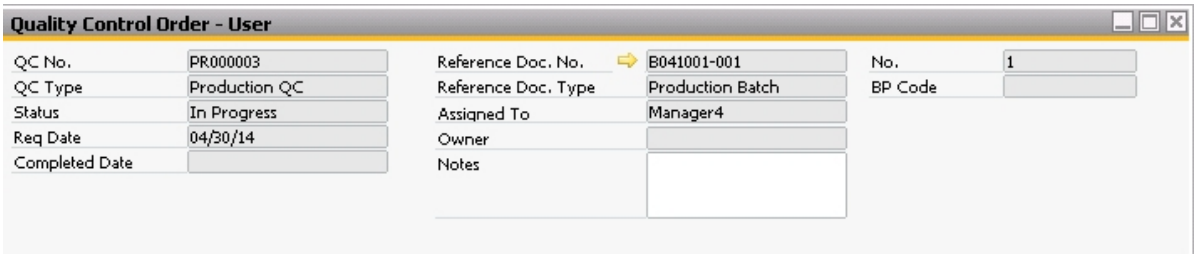
4.1.3 Added Feature to GRPO Screen in SAP B1

The GRPO screen in SAP B1 now includes a feature allowing navigation to the Purchase QC document. This feature adds a context menu option, "View Purchase QC," enabling users to access linked Quality Control orders based on RefDocNo. Upon selection, the QC Order screen opens with all related data, maintaining the current standard functionality.

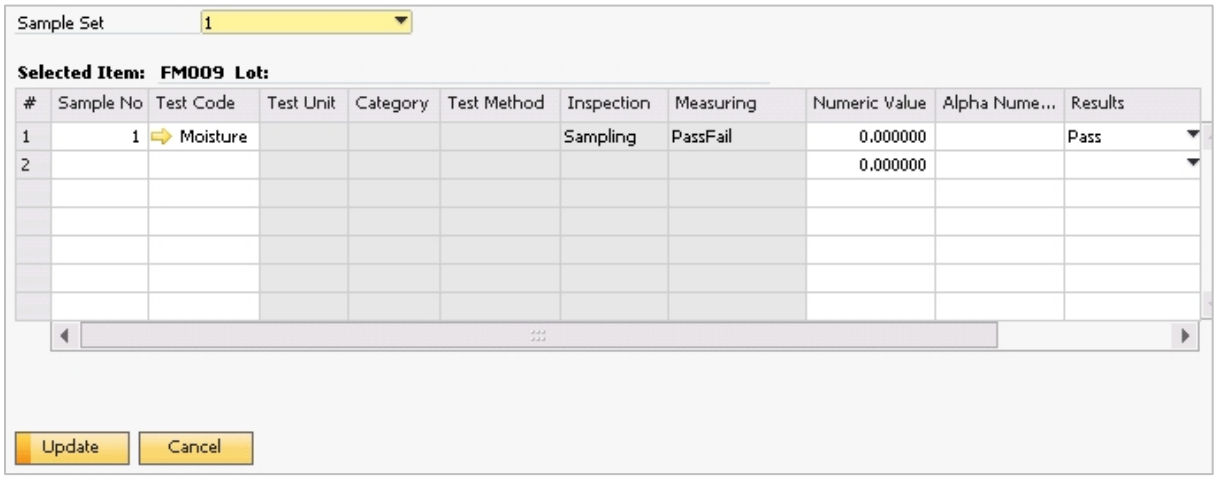

Star Inc | manager
Goods Receipt PO
Cancel
Close
Duplicate
Close for Landed Costs
Print Label
Base Document...
Row Details...
New Activity
Volume and Weight Calculation...
Opening and Closing Remarks
Inventory Posting List
Related Activities
Journal Entry
Batch Number Transactions Report
Related Opportunities
Relationship Map...
What's This?
View Purchase QC
Container/LPN Transaction Report
View Onhand Information
Print Bill of Lading Report
OK
Cancel
Copy From
Copy To

4.2 Quality Control Order – User

The *Quality Control Order – User* screen lets a user view his assigned QC orders. Test results can also be entered on this screen. The system will populate the header section as well as the upper grid. For explanations of these fields, please refer to Section 4.1 Quality Control Order – QC.



Lower Grid



Sample Set: The sample set that needs to be tested. Use this drop-down to filter records for a given sample set. When the drop-down is blank or shows 'ALL,' then all test samples will be shown for the selected lot.

Sample No: This field displays the sample number.

Test Code: The unique code of the quality test that applies to the item or formula.

Once you have selected the desired test code, the system will automatically populate the values of the *Test Unit*, *Category*, *Test Method*, *Inspection*, and *Measuring* fields.

Test Unit: The test unit in which the QC test result should be entered.

Category: This field displays the QC test category.

Test Method: The test method used to perform the test.

Inspection: The inspection method. Available options are *Sampling* or *Continuous.*

Measuring: The method in which the result is obtained. Available options are *Pass/Fail*, *Numeric*, or *Alphanumeric.*

Numeric Value: Use this field to enter QC test results for numeric type tests.

Alpha Numeric: Use this field to enter QC test results for alpha-numeric type tests.

Results: This field displays the QC test result (*Pass* or *Fail*) based on the numeric or alpha-numeric value obtained. For Pass/Fail type tests, the user must select the desired result.

Add/Update/OK: Click the *Add/Update/OK* button to save the record. Once a record is saved, or when older records are retrieved, the caption of the button changes to *OK*.

Cancel: Click the *Cancel* button to close the screen without saving the record.

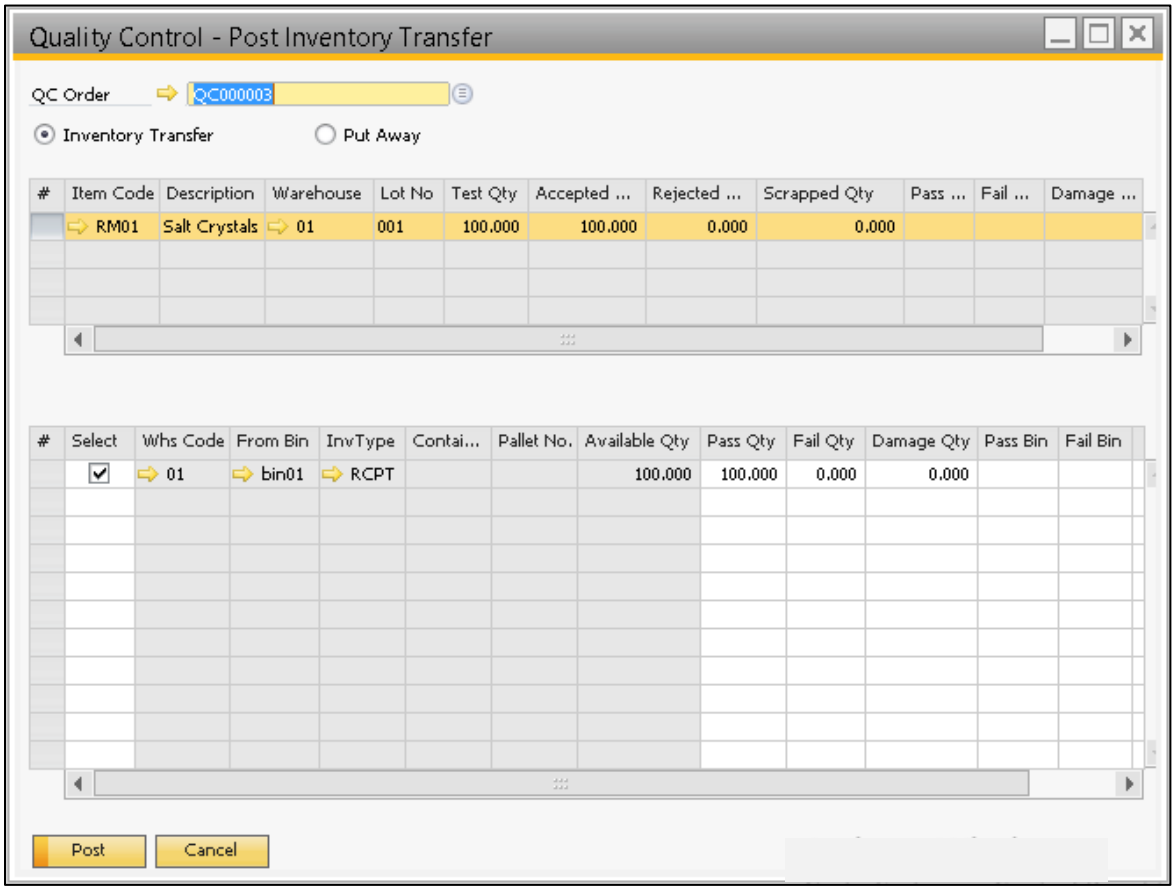
4.2.1 Entering Test Values for QC Tests

1. Use the *Find* button to locate the document on which the QC test needs to be performed.
2. In the *Sample Set* field, select the sample set that should be displayed in the lower grid.
3. Enter the QC test result:
    a. When the measuring parameter is numeric, enter the test result in the *Numeric Value* field.
    b. When the measuring parameter is alpha-numeric, enter the test result in the *Alpha Numeric Value* field.
    c. When the measuring parameter is pass/fail, enter the test result in the *Results* field.

    The QC test result would be displayed automatically based on the numeric or alpha-numeric value specified, if an acceptable range of values (numeric or alpha-numeric) is already defined for the item.
4. Enter any notes or comments on the test in the *Remarks* field.
5. Click the *Update* button to save the record.

4.2.1.1 GoTo Inventory Transfer QC

Use the *Inventory Transfer QC* option to access the *Quality Control – Post Inventory Transfer* screen. From this screen you can post the items in the QC order to the appropriate warehouse and bin.

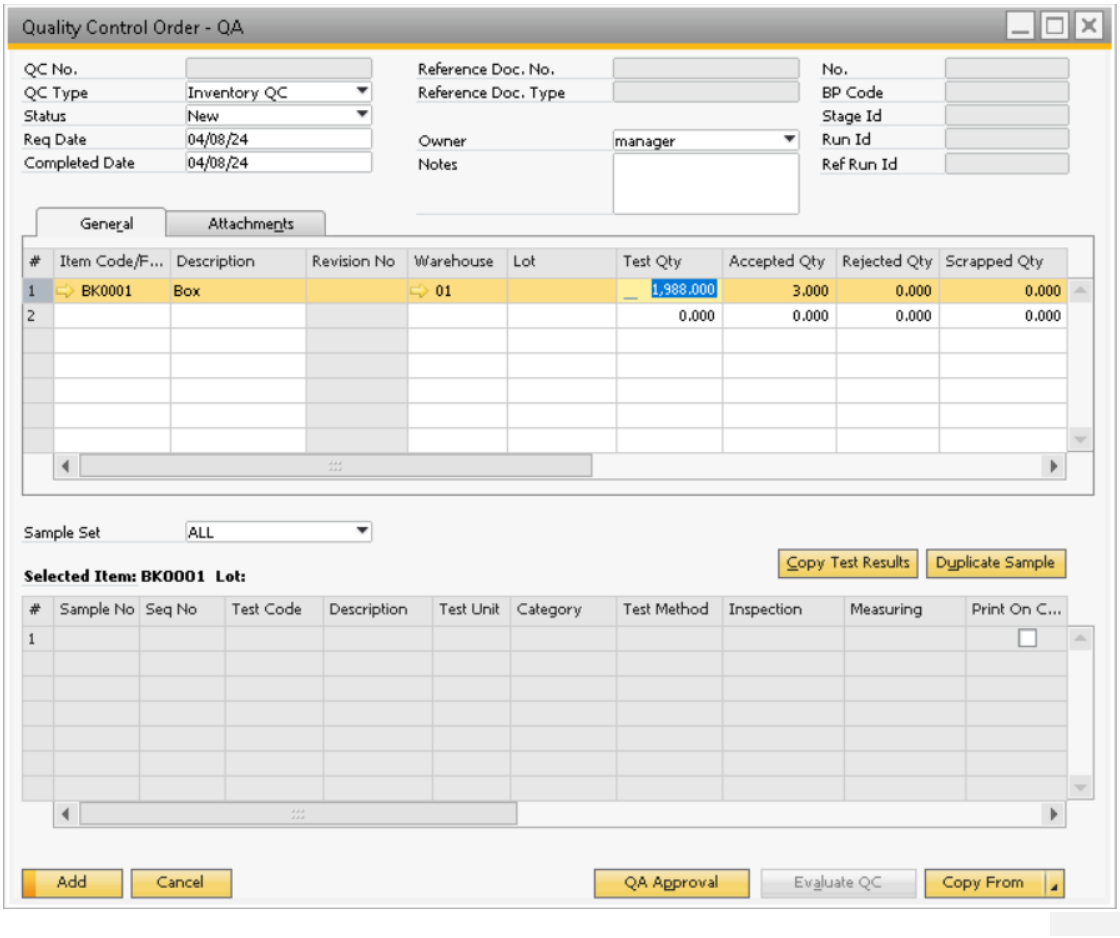


During system setup, be sure to define at least one bin which will be used to quarantine items so they cannot be used in production or shipped to a customer.

See also Section 4.4 of this document.

4.3 Quality Control Order – QA

Use the *Quality Control Order – QA* screen to approve a QC test that has already been evaluated or to re-evaluate a QC test before approving it. Please refer to previous sections of this guide for explanations of the fields displayed.



If necessary, make changes to the test results in the lower grid, which will activate the *Evaluate QC* button. When you click this button, the system determines QC results based on how many samples have passed. The system result can be overridden, if needed.

QA Approval: Once the QC order has been evaluated, click the *QA Approval* button to finalize the test results and close the QC Order.

4.3.1 Approving or Re-evaluating QC Tests

1. Use the *Find* button to retrieve the QC document that requires approval.
2. Verify the evaluated test results.
3. If needed, modify the test values and evaluate the QC order again.
4. Enter the QC decision and the reason for the pass/fail in the *QC Decision* and *Reason Code* fields, respectively.
5. Click the *Post* button to post the changes to the inventory/warehouse.

4.3.2 GoTo Functions

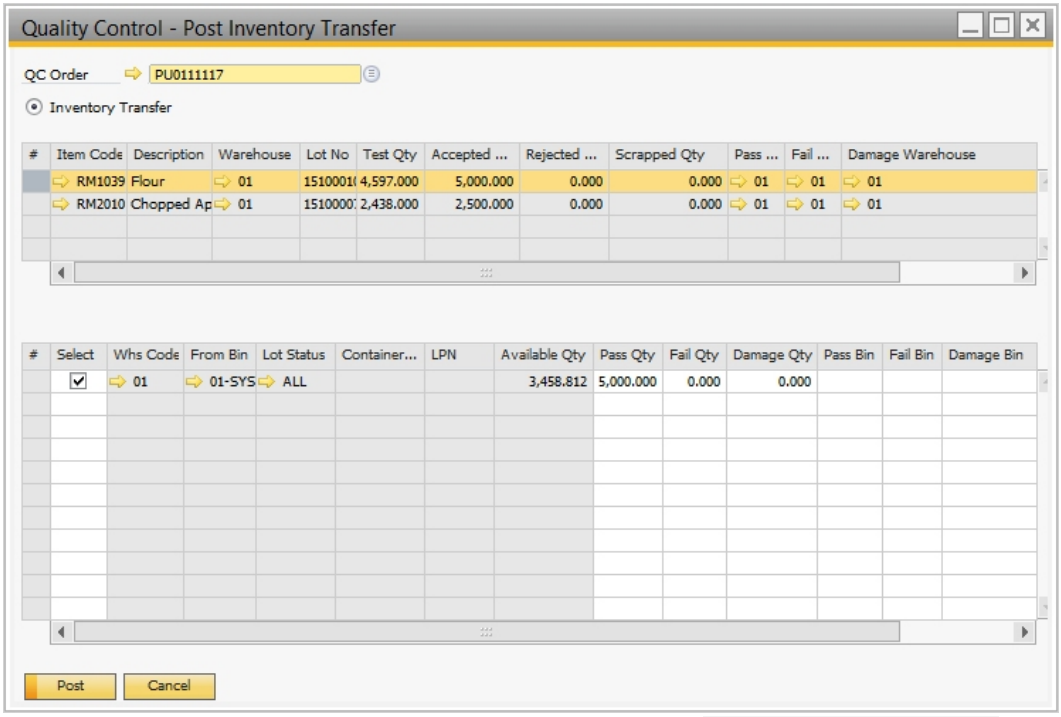
Use the *GoTo* menu to access the *Quality Control – Post Inventory Transfer* screen, from which you can post the items in the QC order to the appropriate warehouse. This function is discussed in Section 4.4 of this document.

The *Activity* functions and the *Relationship Map* are discussed in Section 4.1.2.

4.4 Inventory Transfer QC

Use the *Inventory Transfer QC* screen to post the inventory to the appropriate warehouse based on the QC test results.

Go To: Quality Control → Inventory Transfer – QC.



QC Order: Use this field to retrieve the QC order whose items you wish to post to inventory.

After choosing the desired QC order, the values of the following fields are added by default:

- **Upper Grid:** *Item Code*, *Description*, *Warehouse*, *Lot No.*, and *Test Qty*.
- **Lower Grid:** *Whs Code*, *From Bin*, *Inventory Type*, and *Available Qty*. (Data are also displayed in the *Container Number* and *Pallet Number* fields, if applicable.)

Upper Grid

This grid displays information on the items in the selected QC order that are subject to QC inspection. The user must enter information in the following fields:

- ***Accepted Qty*:** The quantity of the item that has been accepted in QC.
- ***Rejected Qty*:** The quantity of the item that has been rejected in QC.
- ***Scrapped Qty*:** The quantity of the item that has been scrapped in QC.
- ***Pass Warehouse*:** The location where items accepted in QC will be posted.
- ***Fail Warehouse*:** The location where items rejected in QC will be posted.
- ***Damage Warehouse*:** The location where items scrapped in QC will be posted.

Lower Grid

This grid displays the details of item lots selected in the upper grid. The user must enter information in the following fields:

- ***Pass Qty*:** The quantity of the item lot that passed in QC.
- ***Fail Qty*:** The quantity of the item lot that failed in QC.
- ***Damaged Qty*:** The quantity of the item lot that was scrapped in QC.
- ***Pass Bin*:** The bin where passed items are to be posted.
- ***Fail Bin*:** The bin where failed items are to be posted.
- ***Damage Bin*:** The bin where damaged items are to be posted.

4.4.1 Posting Items to Inventory after QC Inspection

1. Open the *Inventory Transfer – QC* screen.
2. Use the lookup next to the *QC Order* field to retrieve the QC order whose items should be posted to inventory.
3. Observe that the values of the following fields are added by default:
   a. **Upper Grid:** *Item Code*, *Description*, *Warehouse*, *Lot No.*, and *Test Qty*.
   b. **Lower Grid:** Whs Code, From Bin, and Available Qty.
4. Based on the QC test results, enter the quantities of items accepted, rejected, and scrapped in the *Accepted Qty*, *Rejected Qty*, and *Scrapped Qty* fields, respectively.
5. Specify the warehouses for items that were passed, failed, or scrapped in QC in the *Pass Warehouse*, *Fail Warehouse*, and *Damage Warehouse* fields, respectively.
6. Enter the quantity of the item that passed in each lot in the *Pass Qty* field.

When the user selects an item in the upper grid, the lots pertaining to that item appear in the lower grid. Each row in the lower grid pertains to a lot.

7. Enter the quantity of the item that failed in each lot in the *Fail Qty* field.
8. Enter the quantity of the item that was scrapped in each lot in the *Damaged Qty* field.
9. Specify three different bins where the passed, failed, and damaged quantities of the item should be posted.
10. Click the *Post* button to process the transaction or the *Cancel* button to reject changes.

4.5 Change Lot Status

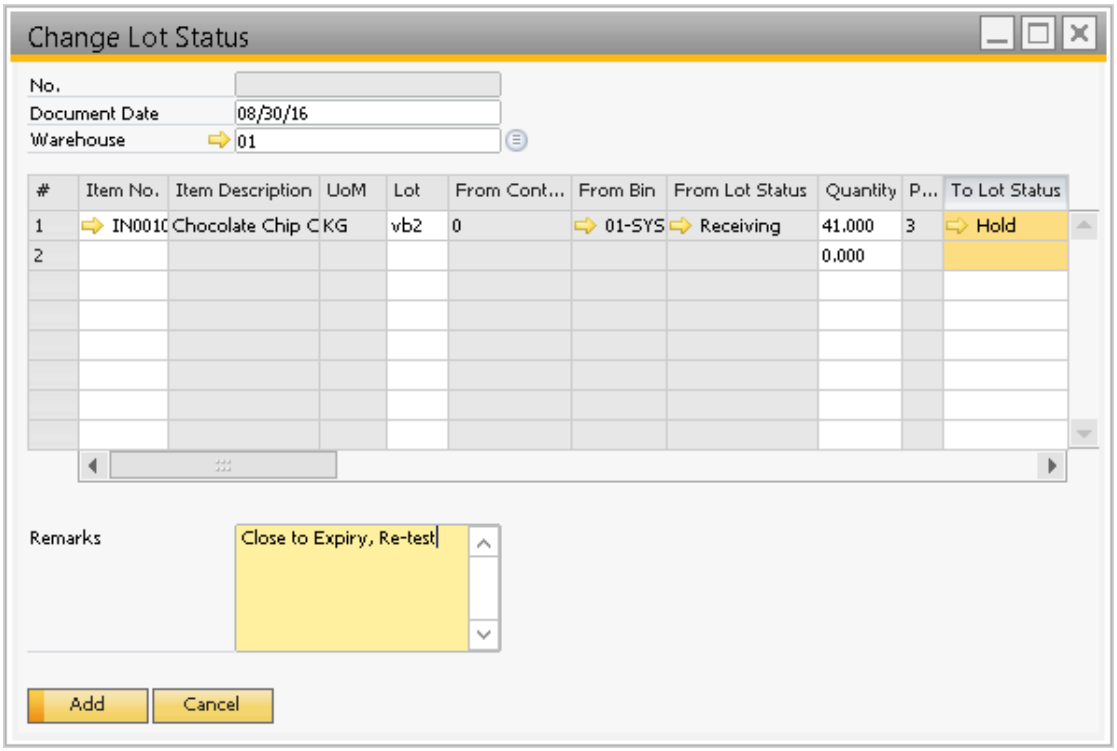
Use the *Change Lot Status* screen to change the Lot Status of items. For example, let's say during physical inspection you find that a finished good lot in your warehouse is damaged. You need to lock the finished good lot so that it is not shipped by mistake. You can use this screen to change the lot status of the damaged lot. You can also change the status of a portion of a lot.

You can create lot statuses such as QC Hold, QC Pass, QC Fail, and QC Pending to classify items based on QC Test results. For each lot status you must associate access rights for various transactions such as *Delivery, Return, Goods Receipt, Goods Issue*, and *Production Issue*, so that only lots with a particular lot status can be used in the authorized transactions. For example, a lot with the lot status QC Hold will not be allowed in transactions such as *Goods Issue* and *Production Issue*, whereas a lot with lot status QC Pass may be issued for production. After the lot has passed the assigned QC Tests, you can change its lot status from QC Hold to QC Pass to make the items available for other transactions.

Lot status are defined at: **Administration → Setup → Inventory → Lot Status**

The *Change lot status* function can be used only if bin tracking is implemented and an item is controlled either by lot or by serial number.

Go To: Quality Control → Change Lot Status.



Document Date: Specify the date on which the lot status is being changed. By default, this field displays the current server date.

Warehouse: Specify the warehouse associated with the item lot whose lot status you would like to change.

Item No.: Use this field to select the items whose lot status you want to change. Once you've done that, the details associated with the item, such as description and UOM, will be displayed by default.

Lot: For each selected item, specify the lot whose items should undergo a change in lot status.

Bin, and Container: The system displays the bin, and container number of the selected lot.

From Lot Status: These fields are used to define which lot status should be changed to another specific lot status.

Quantity: Enter the quantity of the item that should undergo change.

To Lot Status: Select the lot status you want to set**.**

The WMS system updates Lot Status to restrict picked quantities and maintains a UDF. Users cannot manually add any Lot Status with 'SP' or 'PP' prefixes; only the WMS system can add these prefixes.

WMS reserves picked quantities by creating specific Lot Statuses in the database to restrict transactions. The system now filters these Lot Statuses from the lookup in the Change Lot Status, Bulk Lot Status Change, and Container/LPN screens.

Expiry Date: Displays the expiry date of the lot.

Reason Code: Select an appropriate Reason code, signifying the reason of changing the lot status.

Vendor Lot #: Displays the Vendor Lot #, if specified for the lot.

Add: Click the *Add* button to implement the change.

Cancel: Click the *Cancel* button to exit the screen without saving your changes.

You can generate the *Inventory Detail Report* and observe that the lot status of the selected item lot(s) have changed.

4.5.1 Changing the Lot Status of an Item

1. Open the *Change lot status* screen from the *Quality Control Module*.

2. In the *Document Date* field, change the date on which the change in lot status is recorded, if need be.

3. In the *Warehouse* field, select the warehouse in which the item lot whose lot status should be changed is present.

4. Populate the following fields in the grid, as required:

    a) In the *Item No.* field, select the item whose lot status should be changed.

    b) In the *Lot* field, select the item lot whose lot status should be changed.

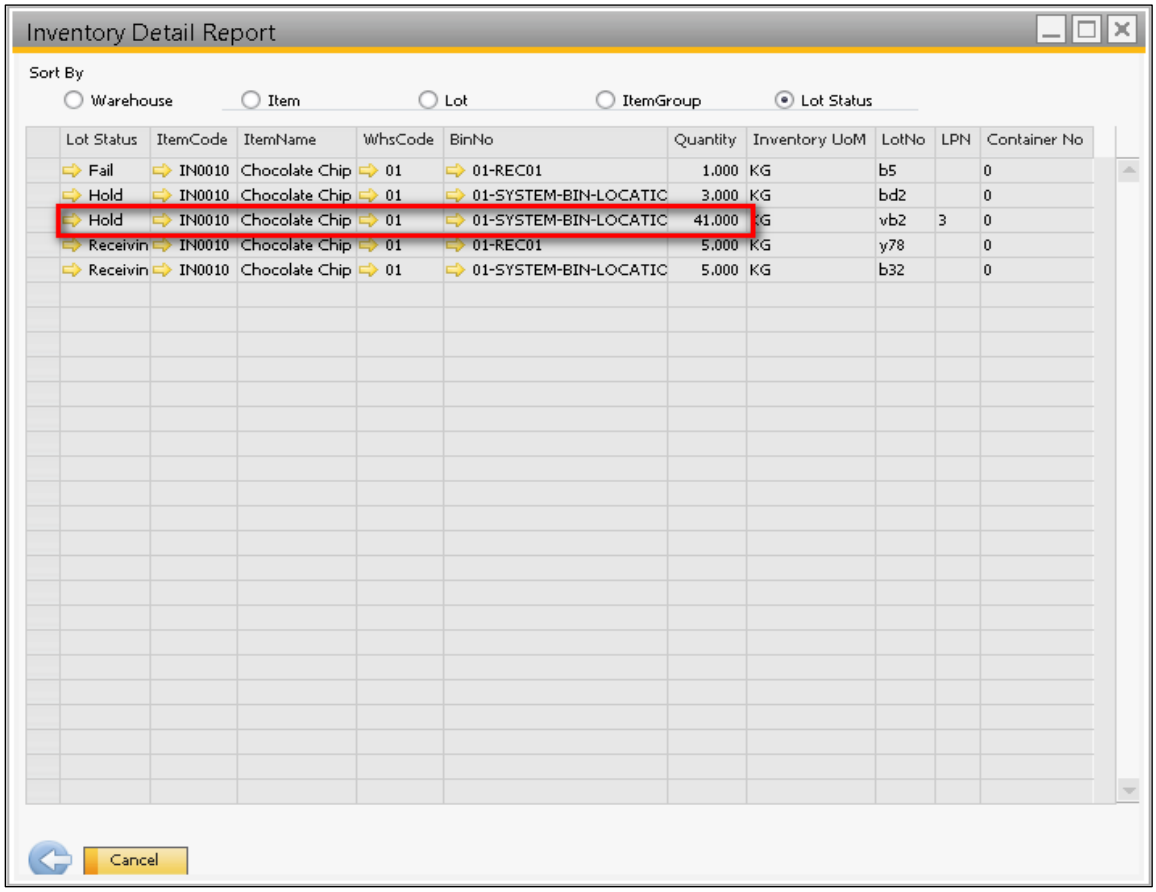
    c) Specify the *Quantity* of the item lot, if need be.

    d) In the *Lot Status To* field, specify the lot status that should be associated with the item lot.

5. If necessary, modify the lot status of more item lots associated with the selected warehouse by repeating Step 4.

6. Click the *Add* button to save the record and implement the changes, or click the *Cancel* button to reject your changes.

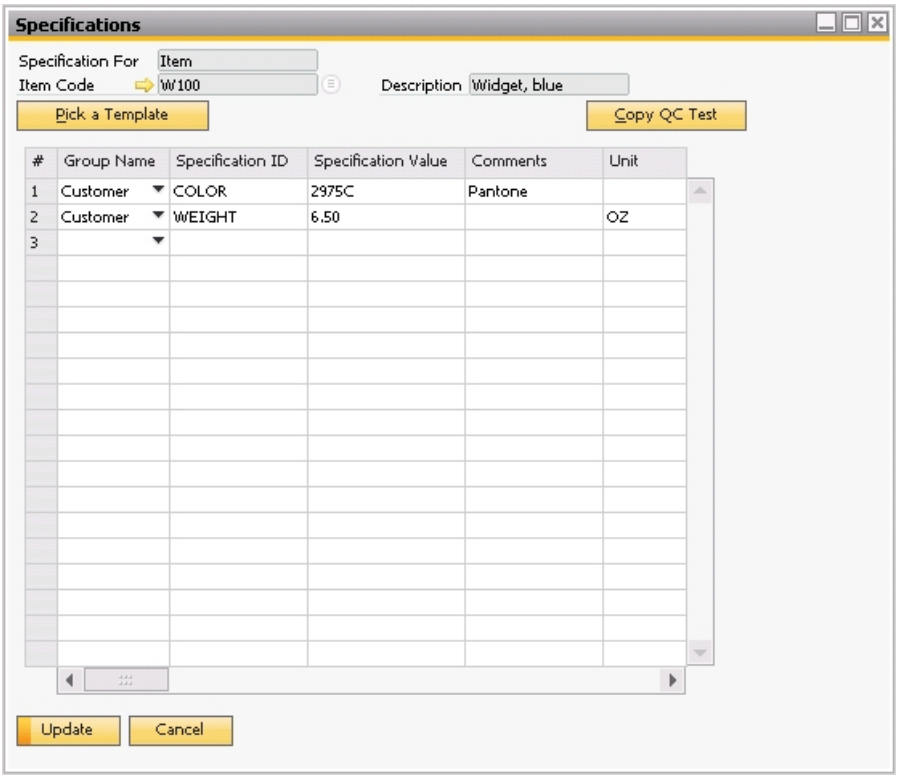
7. Observe that the lot status of the selected item lot has been changed in the *Inventory Detail Report*.



4.6 Specifications

Specifications are used to communicate technical details about your raw materials and formulas. The details could be required by a customer, your organization, or a regulatory agency. Prior to entering specifications in BatchMaster ERP, you must define at least one Specification Group (see Section 2.5). After defining a group, use the *Specifications* screen to record the customer-specified standards to check the performance of the products, processes, or services being offered.

Go To: Quality Control → Specifications.



From the *Purchase Order* screen you can use the *Print Specifications* button to print out the specifications of purchased items.

Specifications For: Select the specification type. Available options are *Formula*, *Item*, and *Template.*

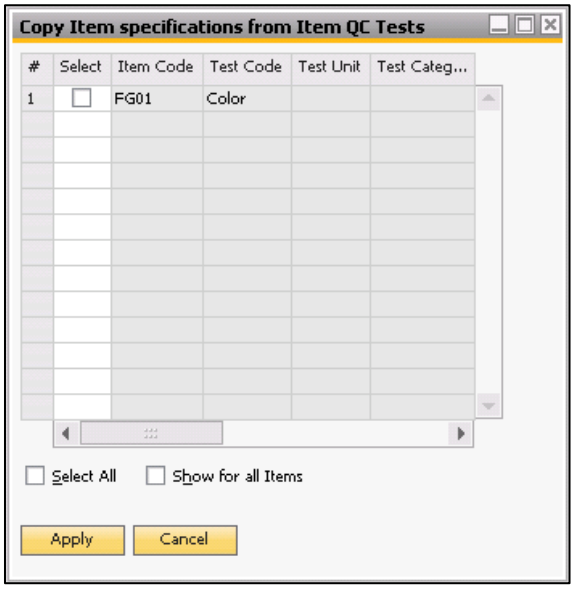
Item Code/Formula ID/Template Code: Select the desired item, formula, or template for which you want to define specifications. The caption of the *Specifications For* field will change based on your choice.

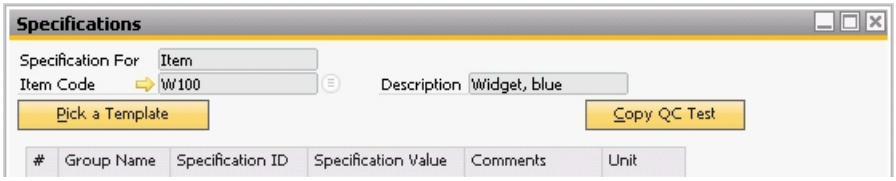
- When you select Item, this field is displayed as *Item Code*.
- When you select Formula, this field is displayed as *Formula ID*.
- When you select Template, this field is displayed as *Template Code*.

Description: The description of the Item Code, Formula ID, or Template Code selected.

Pick a Template: Use this button to pick a pre-defined template, if desired. This button is active only when an item or formula is selected in the *Specifications For* field.

Copy QC Test: Click the *Copy QC Test* button to display the *Copy Item specifications from Item QC Tests* screen, where you can copy QC test values from other items. When you copy from a QC Test, the Test Code is copied to the *Spec ID* field. Check the *Show for All Items* option to show QC tests for all items. Using this option, the selected test values will be copied to the *Item Specification Master*. Item and template specifications will be listed in the grid and can be selected for copying specification values.





Group Name: The appropriate specification group. You can use the drop-down menu next to the *Group Name* field to make this selection.

Specification ID: A unique identifier for the specification.

Specification Value: The ideal specification value for cross-checking the consistency of the specifications.

Comments: Use this field to provide comments.

Unit: The unit in which test results are expressed. Note that the unit field here has nothing to do with the inventory unit of measure.

(The following columns are not shown but can be accessed by scrolling to the right.)

Test Category: The test category to which the test belongs.

Test Method: The predefined test procedure to be performed on items.

Measuring: Specify how test results should be measured. Available options are:

- ***Alphanumeric*:** Select this option if the test result is an alpha-numeric value.
- ***Numeric*:** Select this option if the test result is a numeric value.
- ***Pass/Fail*:** Select this option if the test result can be either pass or fail.

Lower Limit: Use this field to specify the lower limit of the acceptable range of values for the QC test result if the measuring type is Numeric.

Upper Limit: Use this field to specify the upper limit of the acceptable range of values for the QC test result if the measuring type is Numeric.

Target Value: Use this field to specify the target value for the QC test result if the measuring type is Numeric.

Target Alpha: Use this field to specify the target alpha-numeric value for the QC test result if the measuring type is Alpha-numeric.

Add/Update: Click the *Add/Update* button to save your work.

Cancel: Click the *Cancel* button to exit the screen without saving your changes.

4.6.1 Creating Quality Specifications

1. Select the desired option (*Item*, *Formula*, or *Template*) in the *Specification For* field.
2. Enter the desired *Item Code*, *Formula ID*, or *Template Code* based on the selection you made in the *Specification For* field.
3. Select an appropriate template using the *Pick a Template* button, if you have selected *Item* or *Formula* in the *Specification For* field.
4. The *Description* field is automatically populated with the description, if available.
5. Use the *Copy QC Test* button to copy QC tests from the *Item Master Details*.
6. Select the appropriate specification group using the drop-down menu next to the *Specification Group* field.
7. Enter values in the *Spec ID*, *Spec Value*, and *Comments* fields, respectively.
8. Click the *Update* button.

4.7 Bulk Lot Status Change Criteria

Use this screen to change the lot status of lots in bulk. On this screen you can select the following options:

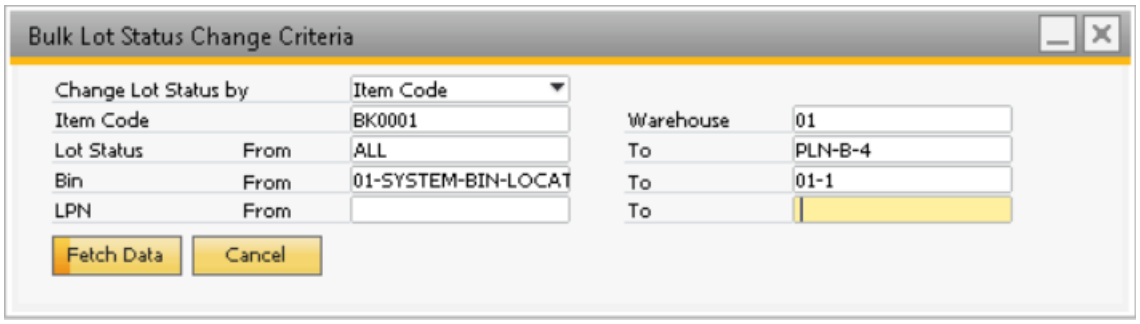
- Item
- Warehouse
- LPN
- Bin No
- GRPO
- Production

Lot status are defined at: **Administration → Setup → Inventory → Lot Status**

The WMS system updates Lot Status to restrict picked quantities and maintains a UDF ("U_BMM_WMSSOURCE") in the "@BMM_INVTYP_DETL" table. Lot Statuses with 'SP' or 'PP' prefixes are inserted in this UDF. Users cannot manually add any Lot Status with 'SP' or 'PP' prefixes; only the WMS system can add these prefixes.

WMS reserves picked quantities by creating specific Lot Statuses in the database to restrict transactions. The system now filters these Lot Statuses from the lookup in the Change Lot Status, Bulk Lot Status Change, and Container/LPN screens. The lookup filter will exclude statuses with 'SP' or 'PP' prefixes.

Go To: Quality Control → Bulk Lot Status Change Criteria.



Change Lot Status By: The available options in the dropdown are:

- Item Code
- LPN
- Bin No
- GRPO
- Production

Item Code: This field specifies Item code whose lot status need to be modified. This is a read-only field.

Warehouse: This field specifies warehouse code where the item is located.

Lot Status From / To: Specify the lower/upper limit of the range of lot status as a filtering criteria. Leaving these fields blank selects the first/last available lot status.

LPN From / To: Specify the lower/upper limit of the range of LPNs as a filtering criteria. Leaving these fields blank selects the first/last available LPN.

Bin From / To: Specify the lower/upper limit of the range of Bins as a filtering criteria. Leaving these fields blank selects the first/last available LPN.

Date: Specify the lower/upper limit of the range of date on which the GRPO has been created. Leaving these fields blank selects the first/last available date.

Doc No.: Specify the lower/upper limit of the range of the GRPO having open status. Leaving these fields blank selects the first/last available GRPO documents.

Sch Start Date: Specify the lower/upper limit of the date of the batch. Leaving these fields blank selects the first/last available scheduled start & end date.

Batch No: Specify the lower/upper limit of the production batch number. Leaving these fields blank selects the first/last available batch numbers.

Fetch Data: Click this button to fetch the Item lots on the Bulk Lot Status Change Utility screen from where, you can change the lot statuses

4.7.1 Changing the Lot Status of an Item

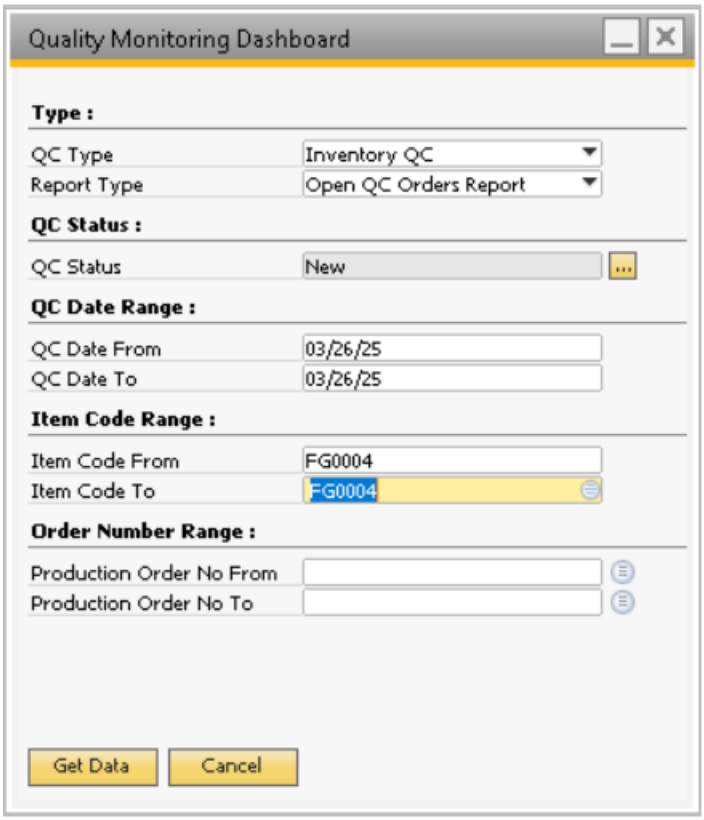
1. Open the Bulk *Lot Status Change Criteria* screen from the *Quality Control Module*.
2. By default, *Item Code* option is selected in the Change Lot Status By field. Select one of the option as Item Code, LPN, Bin No, GRPO or Production.
    a. Specify the Item Code and Warehouse.
    b. Specify the lower/upper limit of the range of lot status.
    c. Specify the lower/upper limit of the range of bin.
    d. Specify the lower/upper limit of the range of LPN.
    e. Specify the lower/upper limit of the range of date on which the GRPO has been created.
    f. Specify the lower/upper limit of the range of the GRPO having open status.
    g. Specify the lower/upper limit of the date of the batch.
    h. Specify the lower/upper limit of the batch numbers.
3. Click the *Fetch* button to fetch the data as per the specified filter criteria.

4.8 Quality Monitoring Dashboard

The new *Quality Monitoring Dashboard* provides an intuitive interface for tracking and managing Quality Control (QC) processes. You can filter and retrieve QC-related data based on different criteria such as QC type, status, date range, item code, order number, and business partner range.

- **Dynamic Report Selection**: You can choose from multiple report types to analyze QC data.
- **Comprehensive Filtering**: Various range filters allow precise data extraction.
- **Enhanced QC Tracking**: You can monitor both ongoing and completed QC processes efficiently.
- The dashboard presents data in a grouped format (e.g., by QC order) and allows you to drill down for detailed insights.

Go To: Quality Control →Quality Control Utilities→ Quality Monitoring Dashboard.

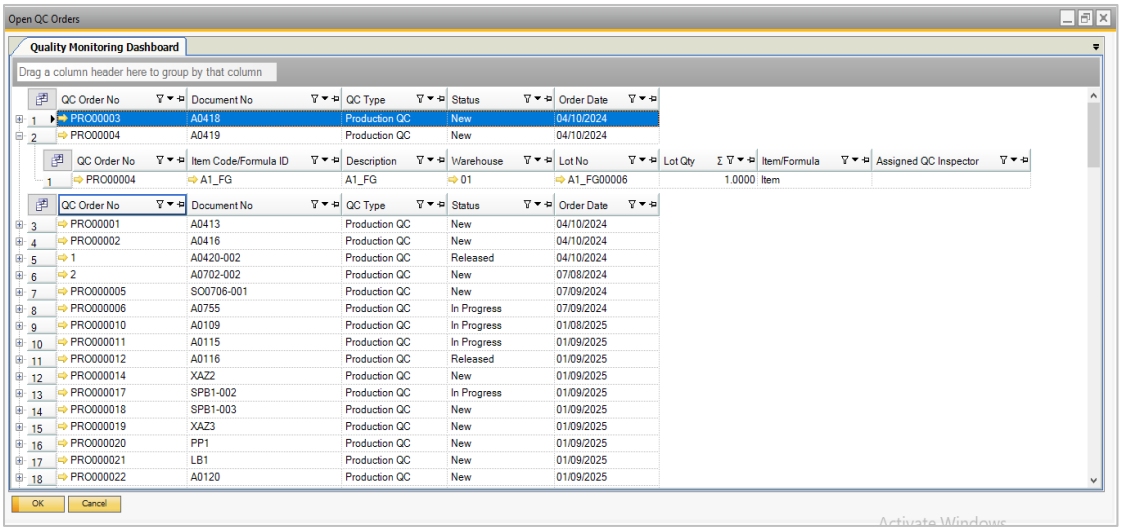


4.8.1 Dashboard Fields and Options

4.8.1.1 Report Type (Mandatory)

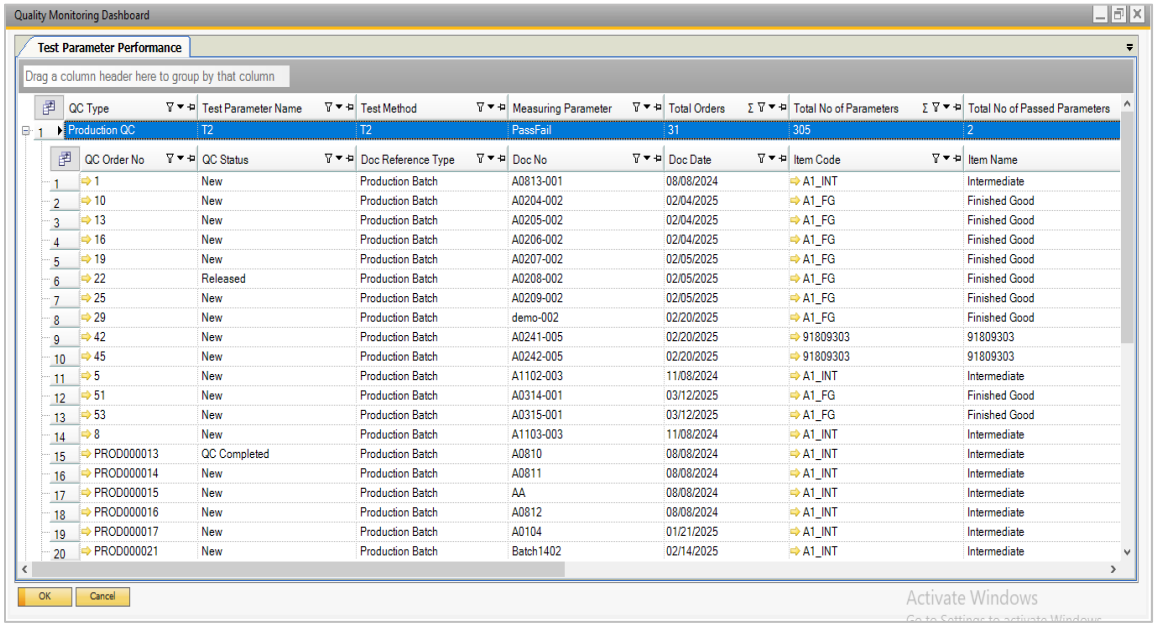
The Report Type field allows users to select the type of report to generate. Only relevant report types are available based on the selected QC Type (Production, Inventory, Sales, Purchase). This is a mandatory field and includes the following options:

- **Open QC Orders Report** – Displays all ongoing QC orders. Displays newly created orders requiring QC inspection. Orders with QC Status 'New', 'Pending', or 'In Progress' within the selected date range and QC Type. QC Status selection is ignored to ensure in-progress orders are always displayed.

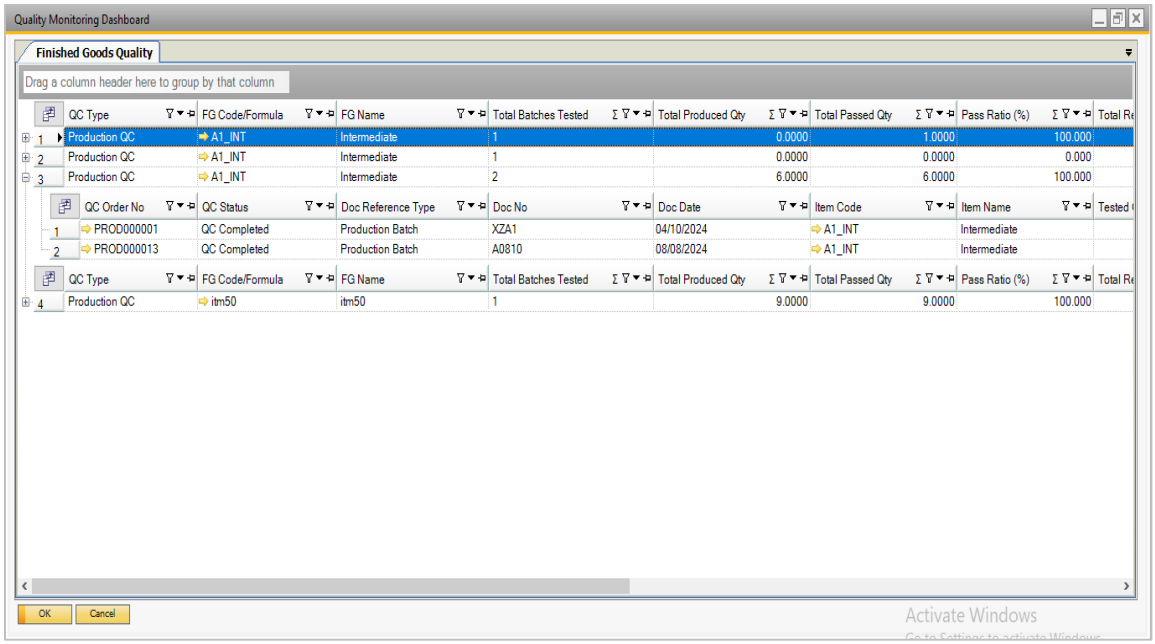


- **Completed/Closed QC Orders Report** – Shows all QC orders that have been finalized. Displays past orders with completed QC inspections. Orders with QC Status as 'Completed' within the selected date range and QC Type. QC Status selection is ignored to ensure completed status orders are always displayed.

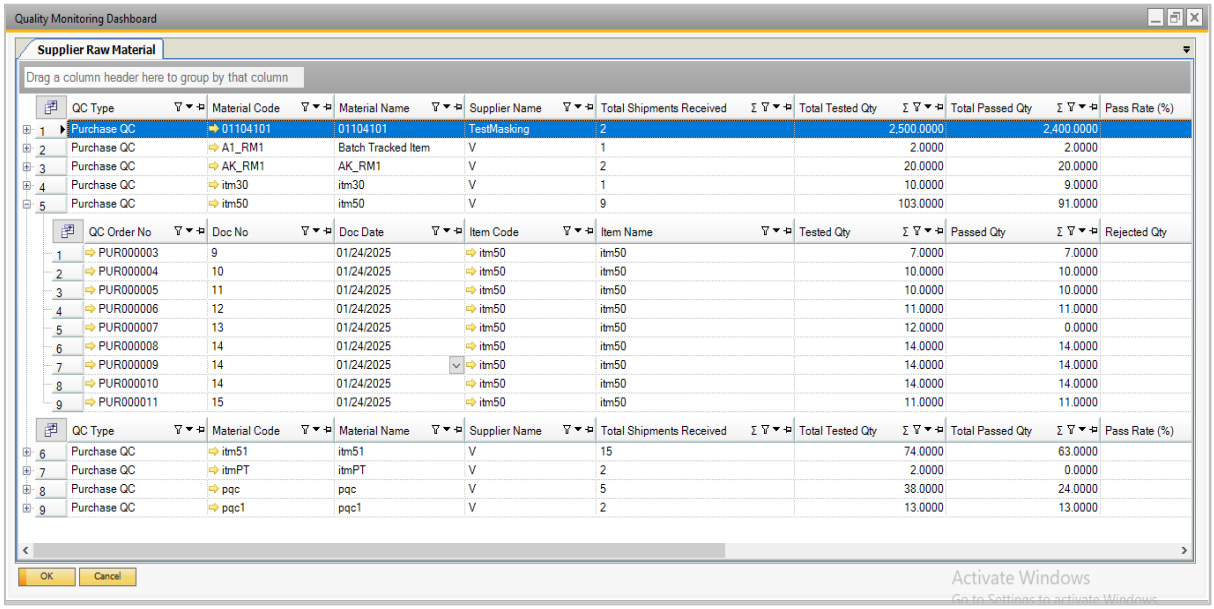
- **QC Test Parameter Performance Report** – Evaluates QC test results across different parameters. Analyzes QC test parameters across different batches and QC types. QC test records within the selected date range and QC Type.



- **Finished Goods Quality Performance Report (Production QC)** – Assesses the quality of finished goods in production. Evaluates finished goods quality performance based on QC results. QC-tested finished goods batches within the selected date range and QC Type as Production QC.



- **Supplier Raw Material QC Performance Report (Purchase QC) –** Analyzes the QC performance of raw materials supplied by vendors. Tracks the quality of raw materials supplied by vendors. QC results of raw material receipts within the selected date range and QC Type as Purchase QC.



4.8.1.2 QC Type (Mandatory)

The QC Type field is required and allows users to specify the category of QC being monitored:

- **Inventory QC** – Quality checks for stored inventory items.

- **Sales QC** – Quality monitoring for products before customer delivery.
- **Production QC** – Ensures quality compliance during production processes.
- **Purchase QC** – Quality control of raw materials purchased from suppliers.

4.8.1.3 QC Status

- Users can filter data by selecting a QC Status (e.g., New, In Progress, Completed).
- Clicking the  button provides an option to view and select available statuses.

4.8.1.4 Filters

- **QC Date Range**: Users can specify a date range for QC records.
- **Item Code Range**: Allows filtering by specific item codes.
- **Order Number Range**: Enables searching based on document order numbers.
- **Business Partner Range**: Filters data by business partners involved in the QC process.

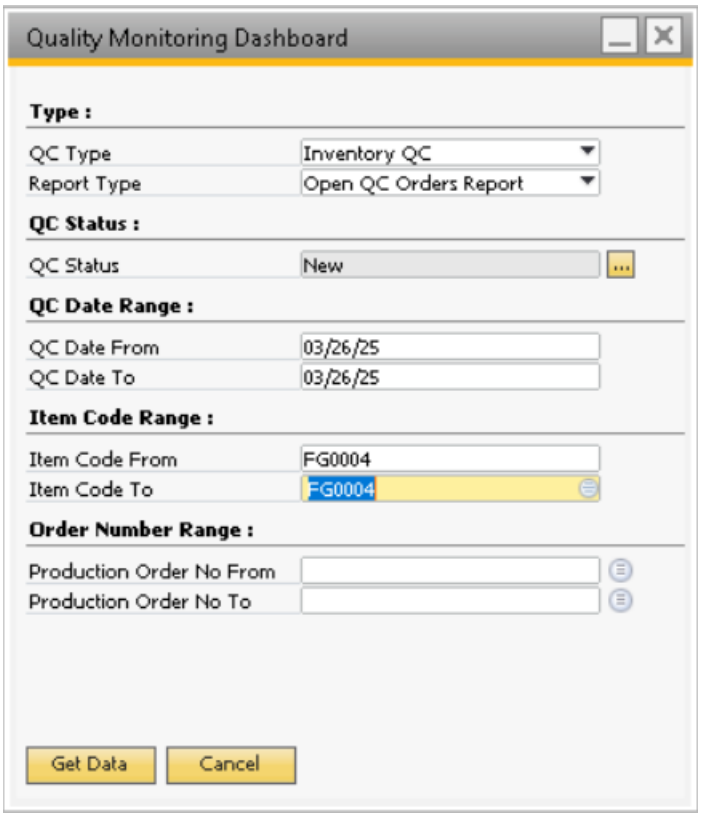
4.8.1.5 Action Buttons

- **Get Data** – Fetches QC data based on the selected filters.
- **Cancel** – Clears selections and exits the dashboard.

4.8.2 Recap: Working with QC Monitoring Dashboard

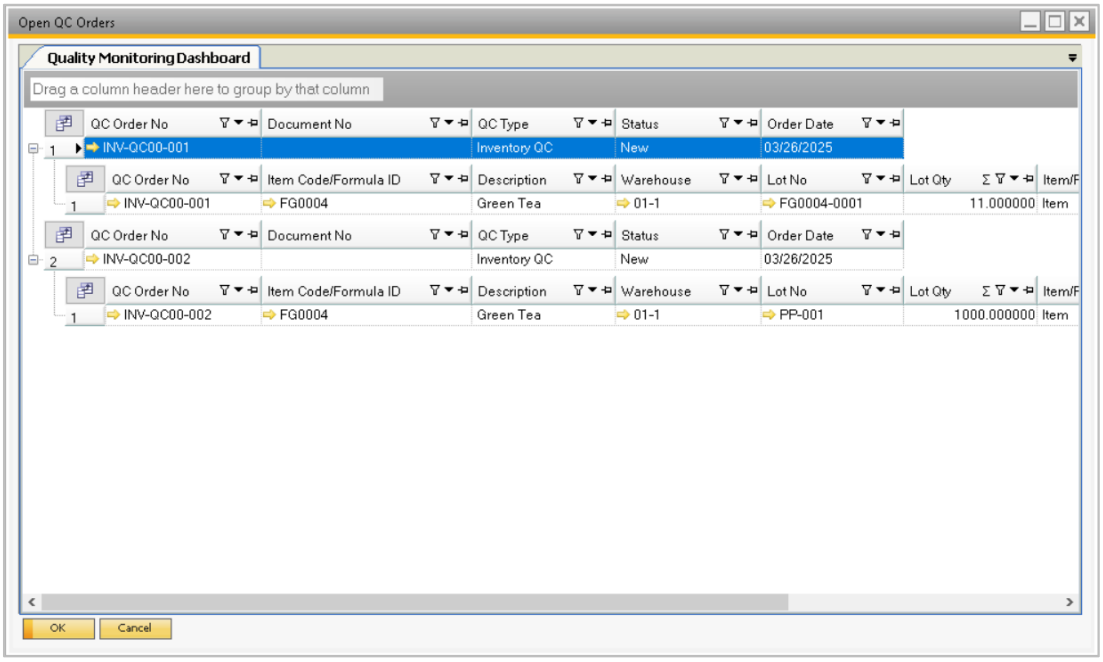
Recap Steps for Using the Quality Monitoring Dashboard:

1. Open the Dashboard.



2. Select QC Type (Mandatory): Choose the relevant QC type from the QC Type dropdown menu.
3. Select Report Type (Mandatory): Choose the desired report type from the Report Type dropdown menu.
4. Select QC Status (Optional): If needed, specify the QC status from the QC Status field. Click the button to select from available status options.
5. Set Date Range (Optional): If you want to filter by date, enter the QC Date From and QC Date To values.
6. Set Item Code Range (Optional): If you want to filter by item code, enter the Item Code From and Item Code To values.
7. Set Order Number Range (Optional): If you want to filter by order number, enter the Document Order No From and Document Order No To values.
8. Set Business Partner Range (Optional): If you want to filter by business partner, enter the Business Partner From and Business Partner To values.

9. Get Data: Click the *Get Data* button to retrieve and display the results based on your selected criteria.

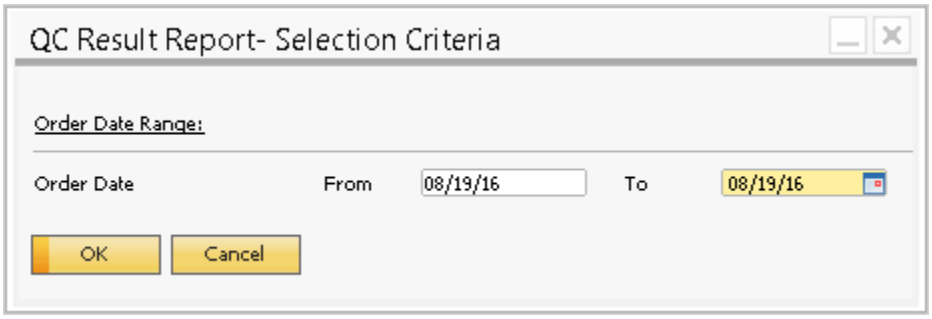


5 QC REPORTS

Go to: Production → Production Reports → QC Reports

5.1 Quality Control Results Report

Use the *Quality Control Results Report* screen to filter QC results on the report.



Order Date Range

Order Date From: The lower limit of the period for which you want to filter QC orders.

Order Date To: The upper limit of the period for which you want to filter QC orders.

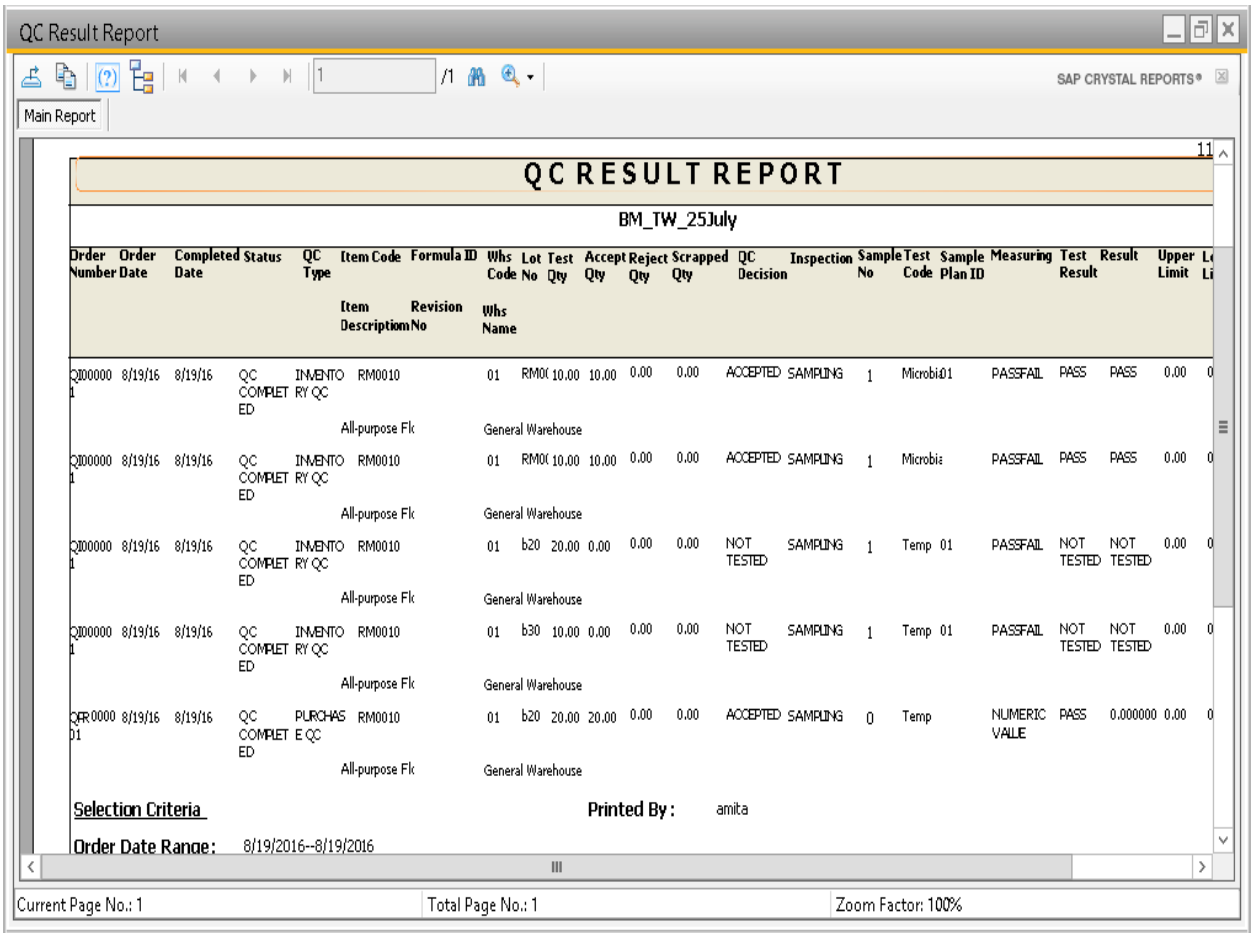
Print: Click the *Print* button to generate a report fulfilling the above-specified criteria.

Cancel: Click the *Cancel* button to close the screen.

5.1.1 Generating a Quality Control Results Report

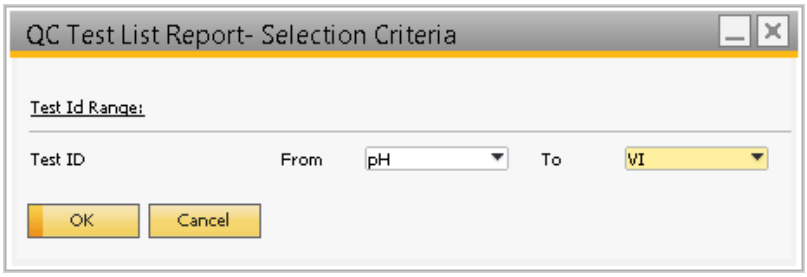
1. In the *Order Date From* and *Order Date To* fields, enter the lower and upper limits, respectively, of the period for which QC orders should be displayed on the report.
2. Click the *Print* button to generate the report.

An example of a generated *Quality Control Results* report is displayed on the following page.


QC Result Report
SAP CRYSTAL REPORTS®
Main Report
QC RESULT REPORT
BM_TW_25July
Order Number
Order Date
Completed Date
Status
QC Type
Item Code
Formula ID
Whs Code
Lot No
Test Qty
Accept Qty
Reject Qty
Scrapped Qty
QC Decision
Inspection
Sample No
Test Code
Sample Plan ID
Measuring
Test Result
Result
Upper Limit
Item Description
Revision No
Whs Name
QI000001 8/19/16 8/19/16 QC COMPLETED INVENTORY QC RM0010 01 RM0(10.00 10.00 0.00 0.00 ACCEPTED SAMPLING 1 Microbi 01 PASSFAIL PASS PASS 0.00
All-purpose Fl General Warehouse
QI000001 8/19/16 8/19/16 QC COMPLETED INVENTORY QC RM0010 01 RM0(10.00 10.00 0.00 0.00 ACCEPTED SAMPLING 1 Microbi PASSFAIL PASS PASS 0.00
All-purpose Fl General Warehouse
QI000001 8/19/16 8/19/16 QC COMPLETED INVENTORY QC RM0010 01 b20 20.00 0.00 0.00 0.00 NOT TESTED SAMPLING 1 Temp 01 PASSFAIL NOT TESTED NOT TESTED 0.00
All-purpose Fl General Warehouse
QI000001 8/19/16 8/19/16 QC COMPLETED INVENTORY QC RM0010 01 b30 10.00 0.00 0.00 0.00 NOT TESTED SAMPLING 1 Temp 01 PASSFAIL NOT TESTED NOT TESTED 0.00
All-purpose Fl General Warehouse
QR00001 8/19/16 8/19/16 QC COMPLETED PURCHASE QC RM0010 01 b20 20.00 20.00 0.00 0.00 ACCEPTED SAMPLING 0 Temp NUMERIC VALUE PASS 0.000000 0.00
All-purpose Fl General Warehouse
Selection Criteria
Printed By : amita
Order Date Range: 8/19/2016--8/19/2016
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

5.2 Quality Control Test List Report

From the *Quality Control Test List* screen you can generate a report that displays details of QC tests for a range of Test IDs.



Test ID From: The lower limit of the range of Test IDs for which QC tests will be displayed in the report.

Test ID To: The upper limit of the range of Test IDs for which QC tests will be displayed in the report.

Leaving the *Test ID From* and *Test ID To* fields blank has the same effect as selecting the first and last available values, respectively.

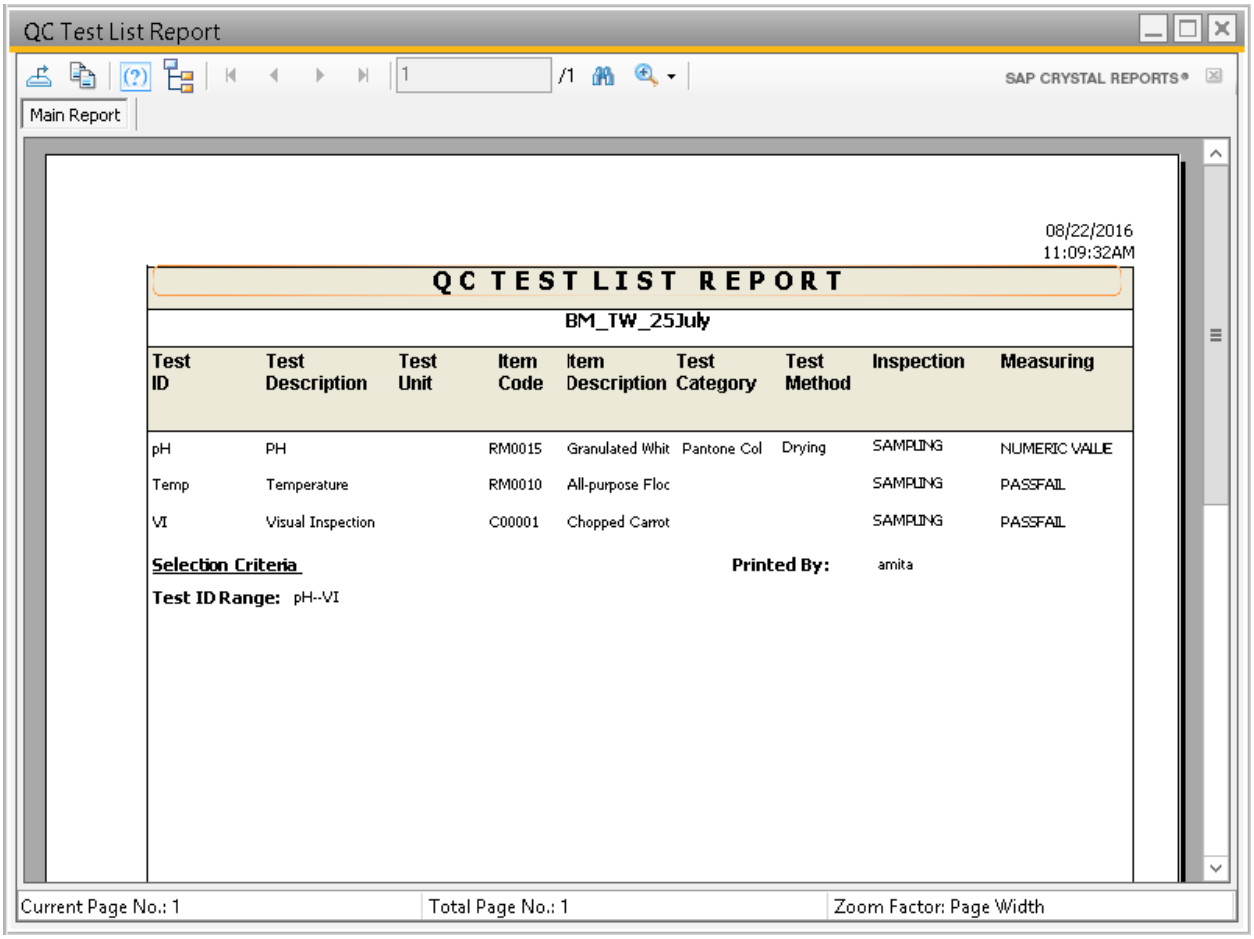
Print: Click the *Print* button to generate a report fulfilling the above-specified criteria.

Cancel: Click the *Cancel* button to cancel the request for report generation.

5.2.1 Generating a Quality Control Test List Report

1. In the *Test ID From* and *Test ID To* fields, enter the lower and upper limits, respectively, of the Test ID range pertaining to which QC tests will be displayed in the report.
2. Click the *Print* button to generate the report.

An example of a generated *Quality Control Test List* report is displayed on the following page.


QC Test List Report
SAP CRYSTAL REPORTS®
Main Report
08/22/2016
11:09:32AM
QC TEST LIST REPORT
BM_TW_25July
Test ID
Test Description
Test Unit
Item Code
Item Description
Test Category
Test Method
Inspection
Measuring
pH
PH
RM0015
Granulated Whit
Pantone Col
Drying
SAMPLING
NUMERIC VALUE
Temp
Temperature
RM0010
All-purpose Floc
SAMPLING
PASSFAIL
VI
Visual Inspection
C00001
Chopped Carrot
SAMPLING
PASSFAIL
Selection Criteria
Printed By:
amita
Test ID Range: pH--VI
Current Page No.: 1
Total Page No.: 1
Zoom Factor: Page Width

5.3 Lot Expiration Report

From the *Lot Expiration Report* screen you can generate a report that displays a list of lots that will expire in a specified number of days. You can use this report to find out what raw materials or finished goods are expiring in near terms and can take decisions accordingly.

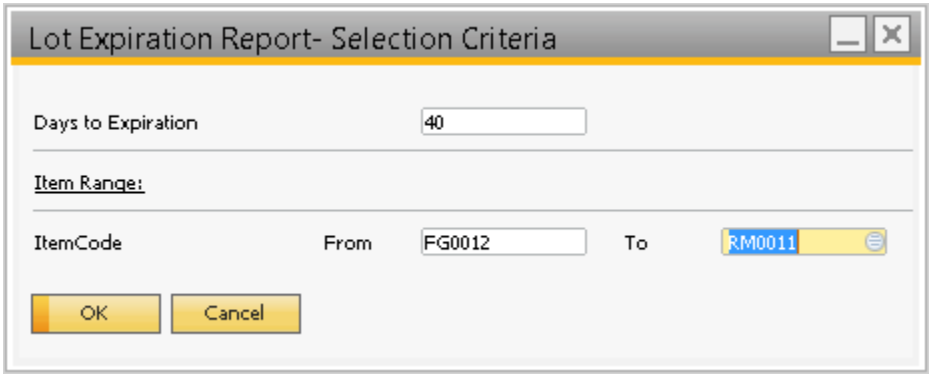
Days to Expiration: The number of days to expiration based on which items can be filtered on the report.

Item Code From: The lower limit of the range of item codes for which item details are displayed in the report.

Item Code To: The upper limit of the range of item codes pertaining to which item details are displayed in the report.

Print: Click the *Print* button to generate a report fulfilling the above-specified criteria.

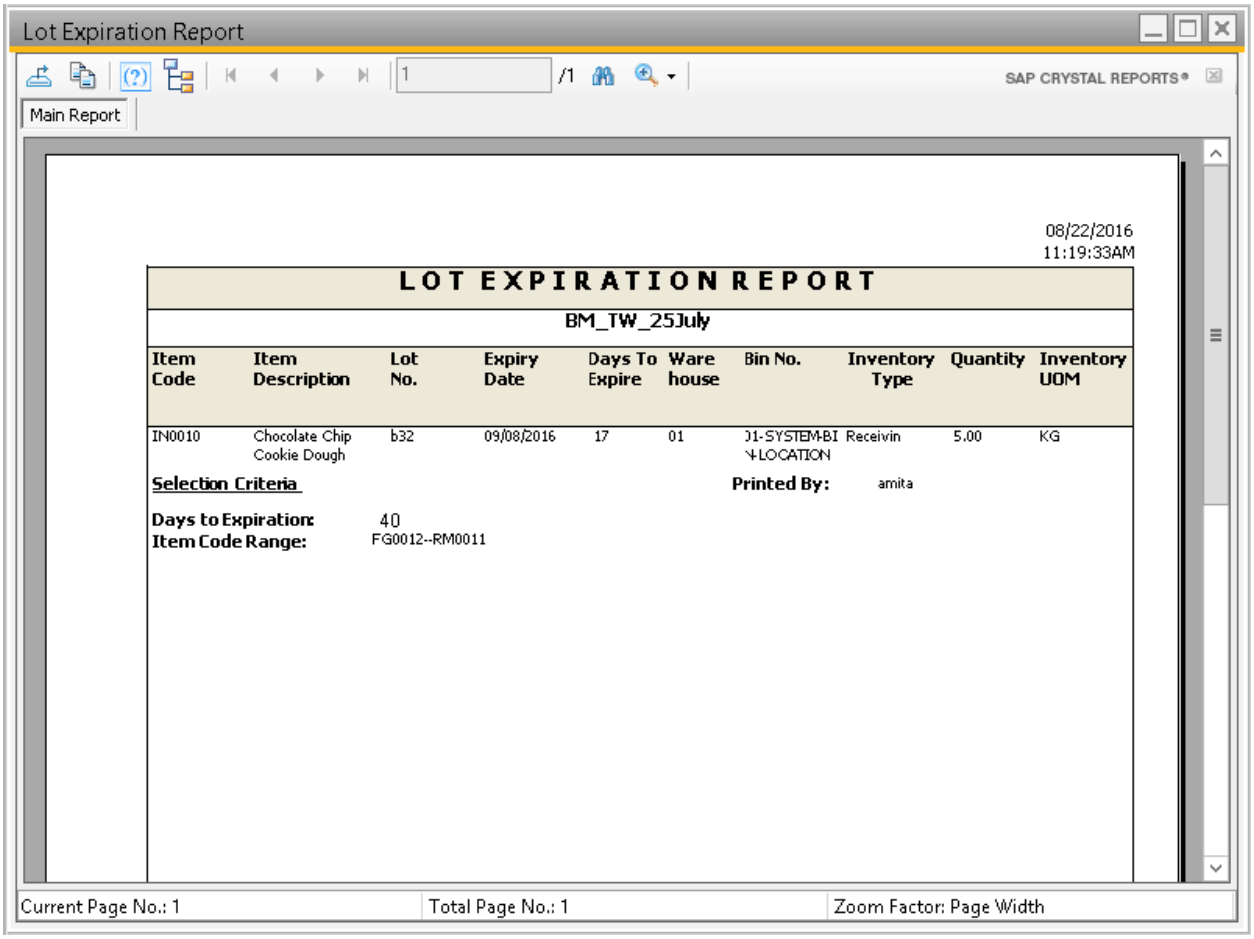
Cancel: Click the *Cancel* button to cancel the request for report generation.



5.3.1 Generating a Lot Expiration Report

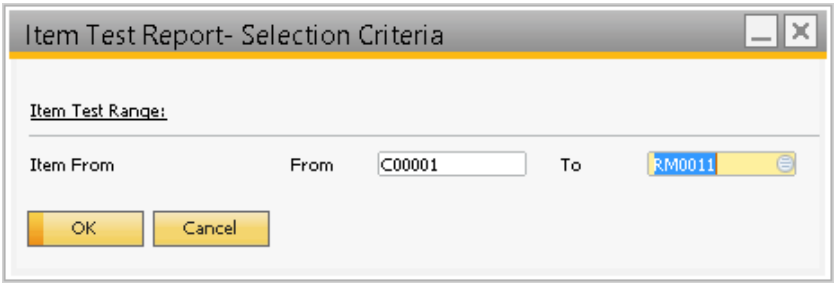
1. In the *Days to Expiration* field, enter the number of days for which you want to view items that expire within this period.
2. In the *Item Code From* and *Item Code To* fields, enter the lower and upper limits, respectively, of the range of item codes to be used to filter items for the report.
3. Click the *Print* button to generate the report.

An example of a generated *Lot Expiration Report* is displayed on the following page.


Lot Expiration Report
SAP CRYSTAL REPORTS®
Main Report
08/22/2016
11:19:33AM
LOT EXPIRATION REPORT
BM_TW_25July
Item Code
Item Description
Lot No.
Expiry Date
Days To Expire
Ware house
Bin No.
Inventory Type
Quantity
Inventory UOM
IN0010
Chocolate Chip Cookie Dough
b32
09/08/2016
17
01
01-SYSTEM-BIN-LOCATION
Receivin
5.00
KG
Selection Criteria
Printed By:
amita
Days to Expiration:
40
Item Code Range:
FG0012--RM0011
Current Page No.: 1
Total Page No.: 1
Zoom Factor: Page Width

5.4 Item Test Report

The *Item Test Report* displays a list of the QC tests that apply to a selected range of items.



Item Test From: The lower limit of the item range for which QC tests will be displayed.

Item Test To: The upper limit of the item range for which QC tests will be displayed.

Leaving the *Item Test From* and *Item Test To* fields blank has the same effect as selecting the first and last available values, respectively, in the *Item Master* table.

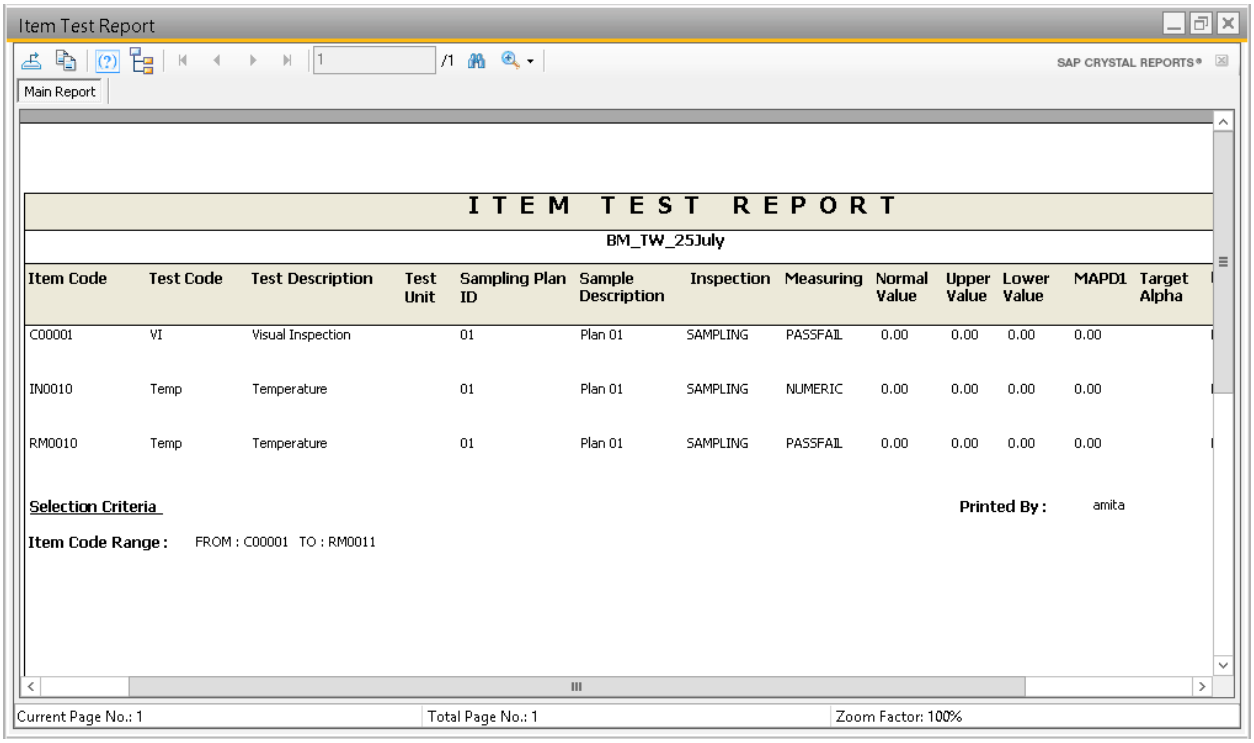
Print: Click the *Print* button to generate a report fulfilling the above-specified criteria.

Cancel: Click the *Cancel* button to cancel the request for report generation.

5.4.1 Generating an Item Test Report

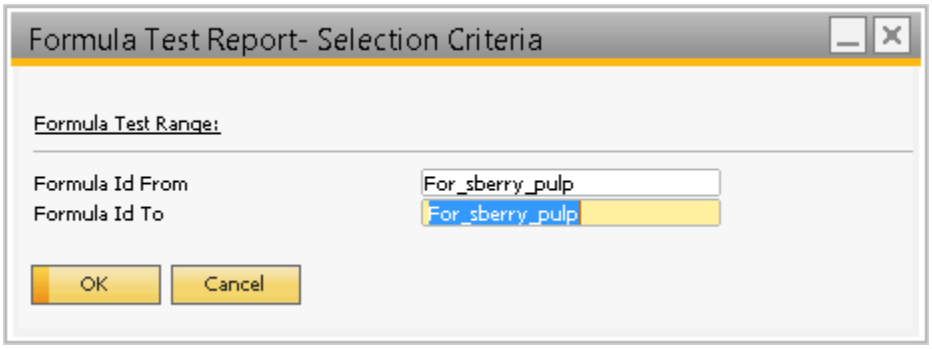
1. In the *Item Test From* and *Item Test To* fields, enter the lower and upper limits, respectively, of the item test range for which QC tests will be displayed in the report.
2. Click the *Print* button to generate the report.

An example of a generated *Item Test Report* is displayed on the following page.


Item Test Report
SAP CRYSTAL REPORTS®
Main Report
ITEM TEST REPORT
BM_TW_25July
Item Code
Test Code
Test Description
Test Unit
Sampling Plan ID
Sample Description
Inspection
Measuring
Normal Value
Upper Value
Lower Value
MAPD1
Target Alpha
C00001 VI Visual Inspection 01 Plan 01 SAMPLING PASSFAIL 0.00 0.00 0.00 0.00
IN0010 Temp Temperature 01 Plan 01 SAMPLING NUMERIC 0.00 0.00 0.00 0.00
RM0010 Temp Temperature 01 Plan 01 SAMPLING PASSFAIL 0.00 0.00 0.00 0.00
Selection Criteria
Printed By : amita
Item Code Range : FROM : C00001 TO : RM0011
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

5.5 Formula Test Report

From the *Formula Test Report* screen you can generate a report that displays a list of QC tests applicable for a range of formulas.



Formula Test From: The lower limit of the range of formula tests used to filter the report.

Formula Test To: The upper limit of the range of formula tests used to filter the report.

Leaving the *Formula Test From* and *Formula Test To* fields blank has the same effect as selecting the first and last available values, respectively.

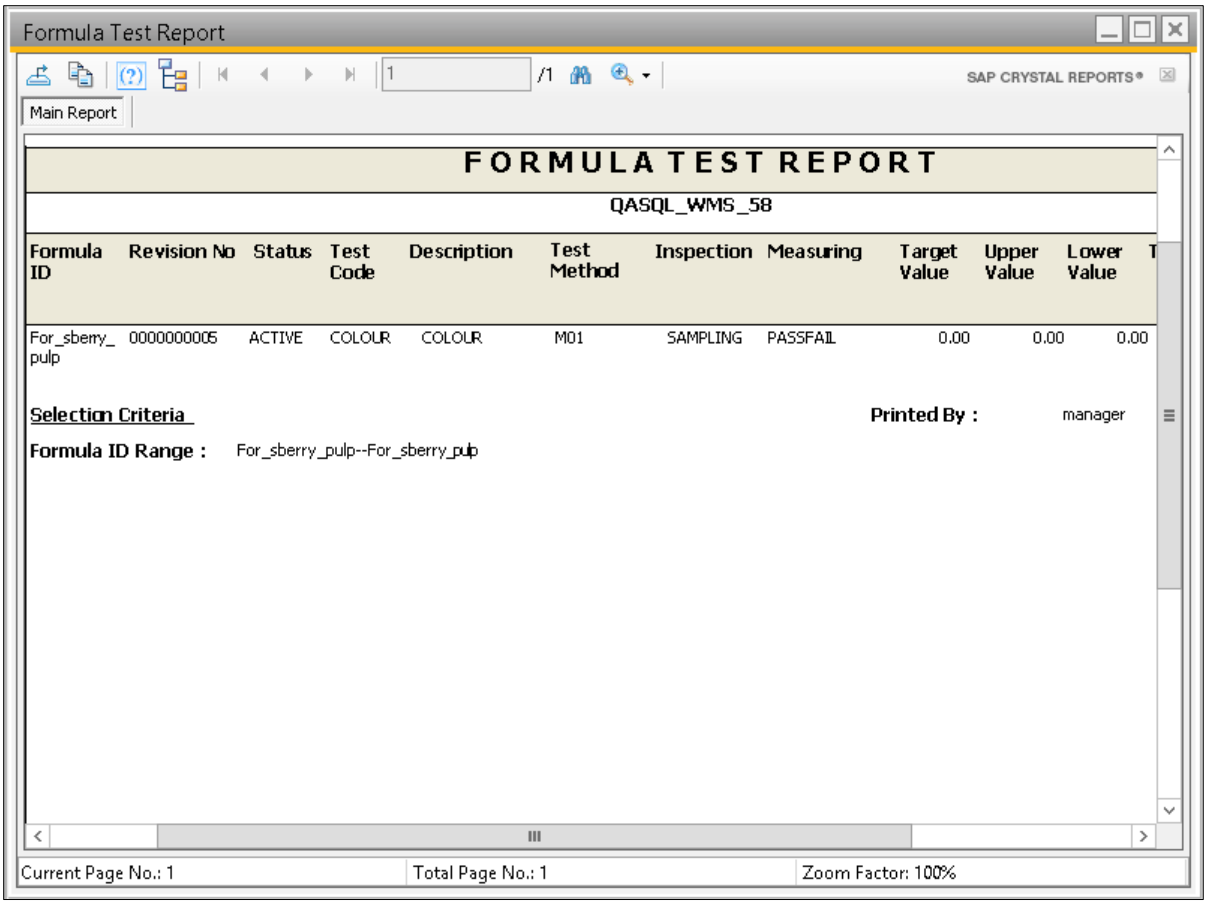
Print: Click the *Print* button to generate a report fulfilling the above-specified criteria.

Cancel: Click the *Cancel* button to cancel the request for report generation.

5.5.1 Generating a Formula Test Report

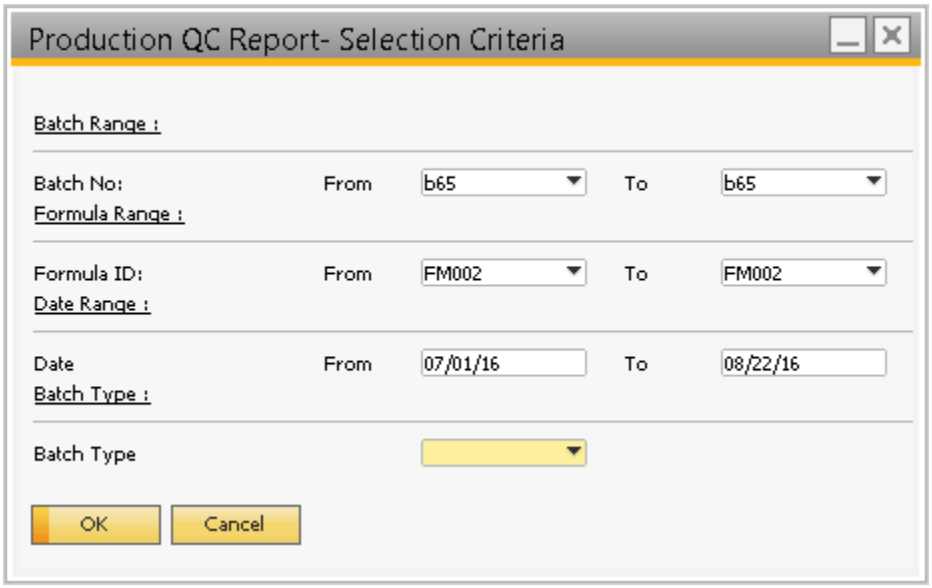
1. In the *Formula Test From* field, enter the lower limit of the formula test range used to filter the report.
2. In the *Formula Test To* field, enter the upper limit of the formula test range used to filter the report.
3. Click the *Print* button to generate the report.

An example of a generated *Formula Test Report* is displayed on the following page.


Formula Test Report
SAP CRYSTAL REPORTS®
Main Report
FORMULA TEST REPORT
QASQL_WMS_58
Formula ID
Revision No
Status
Test Code
Description
Test Method
Inspection
Measuring
Target Value
Upper Value
Lower Value
For_sberry_pulp
0000000005
ACTIVE
COLOUR
COLOUR
M01
SAMPLING
PASSFAIL
0.00
0.00
0.00
Selection Criteria
Printed By :
manager
Formula ID Range :
For_sberry_pulp--For_sberry_pulp
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

5.6 Production QC Report

Use the *Production QC Report* screen to generate a report that displays information on QC tests conducted on intermediates or finished goods produced in batches. You can filter production QC tests conducted on a selected range of batches, for a selected range of formulas, during a specific time period, or on a specific type of batch.



Batch Range

Filter QC tests conducted on intermediates or finished goods produced in a specific range of batches.

Batch No From: The lower limit of the range of batches used to filter QC tests conducted on intermediates or finished goods produced in these batches.

Batch No To: The upper limit of the range of batches used to filter QC tests conducted on intermediates or finished goods produced in these batches.

Formula Range

Filter QC tests conducted on intermediates or finished goods produced using a specific formula or a range of formulas.

Formula ID From: The lower limit of the formula range used to filter QC test details for the report.

Formula ID To: The upper limit of the formula range used to filter QC test details for the report.

Date Range

Date From: The starting date of the time period for which QC test details should be displayed on the report.

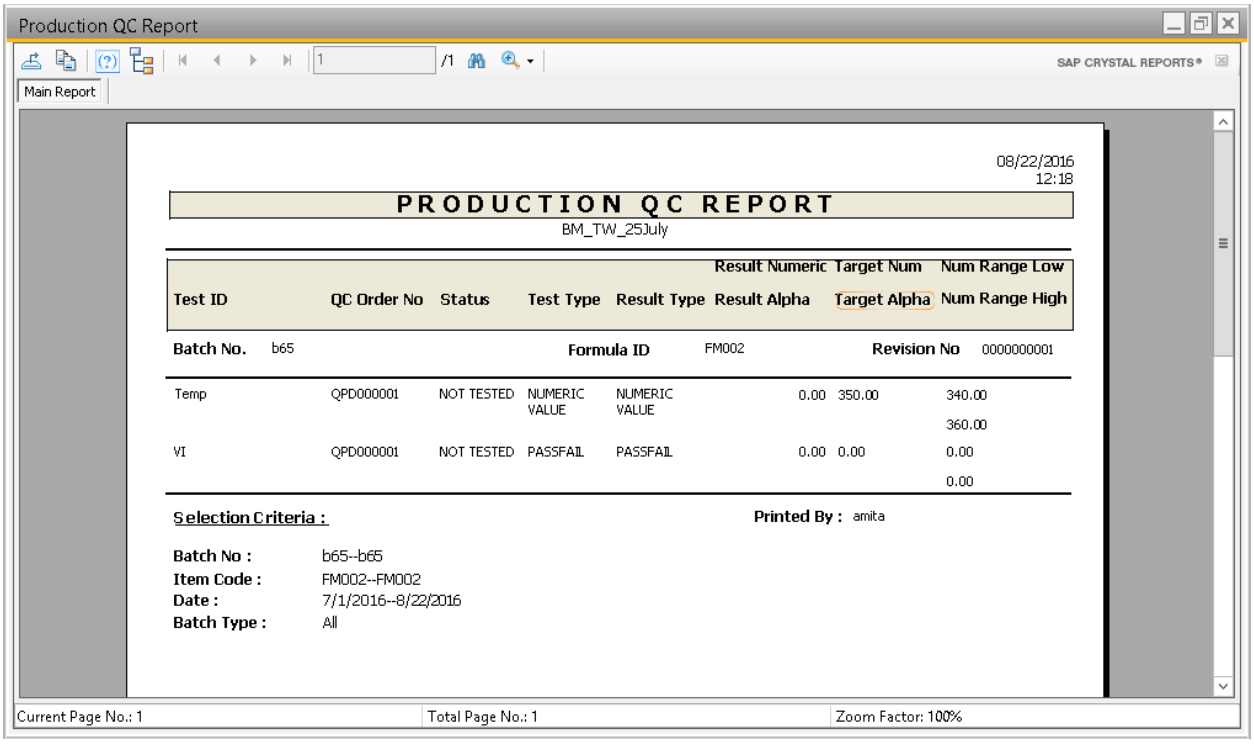
Date To: The ending date of the time period for which QC test details should be displayed on the report.

Batch Type: The type of batch for which QC test details should be displayed on the report.

5.6.1 Generating a Production QC Report

1. In the *Batch No. From* and *Batch No. To* fields, enter the lower and upper limits, respectively, of the range of batch numbers used to filter QC test details for the report.
2. In the *Formula ID From* and *Formula ID To* fields, enter the lower and upper limits, respectively, of the range of formulas used to filter QC test details for the report.
3. In the *Date From* and *Date To* fields, enter the lower and upper limits, respectively, of the time period used to filter QC test details for the report.
4. Click the *Print* button to generate the report.

An example of a generated *Production QC Report* is displayed on the following below.



5.7 COA Report

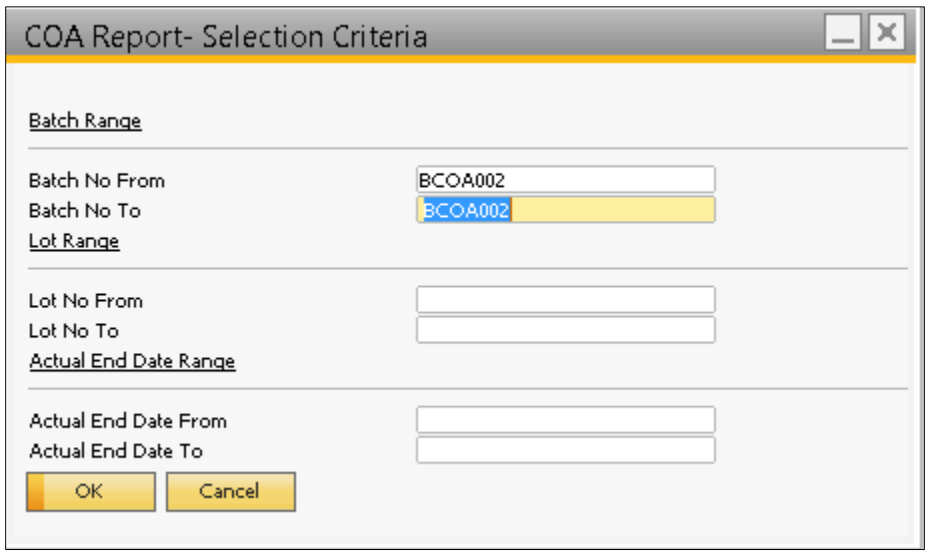
From the *COA Report* screen you can generate a report that will be issued to the customer when the material sold is dispatched. The report contains critical information regarding the quality tests applied on the finished goods and the results obtained in those tests. The report also prints QC test results for the intermediates for a range of fill- or assembly-type batches.

On the report, the header will show only the information for the FG and the tests associated with the FG and its intermediates will be printed under the FG section.

If intermediates are not available for assembly-type batches, the report would print the batch tests. If intermediates are not available for mix-type batches, the report would print the COA information.

To print a *COA Report*, ensure the following:

- The finished good for which the COA is being generated should be a lot-tracked item.
- Set the value of the *Print on COA* field in the *Formula Entry* screen of the *QC Test* tab to *Yes*.
- Check the *Print on COA* option on the *Quality Control* tab of the *Item Master Details* screen.



Batch Range

Batch No From: The lower limit of the batch range used to filter QC test details for the report.

Batch No To: The upper limit of the batch range used to filter QC test details for the report.

Lot No. Range

Lot No. From: The lower limit of the range of lot numbers used to filter QC test details for the report.

Lot No. To: The upper limit of the range of lot numbers used to filter QC test details for the report.

Actual End Date Range

Actual End Date From: The lower limit of the range of batch closure dates used to filter QC test details for the report.

Actual End Date To: The upper limit of the range of batch closure dates used to filter QC test details for the report.

Leaving any of these fields blank is the same as selecting the first and last available values in the lookups for the lower and upper limits, respectively.

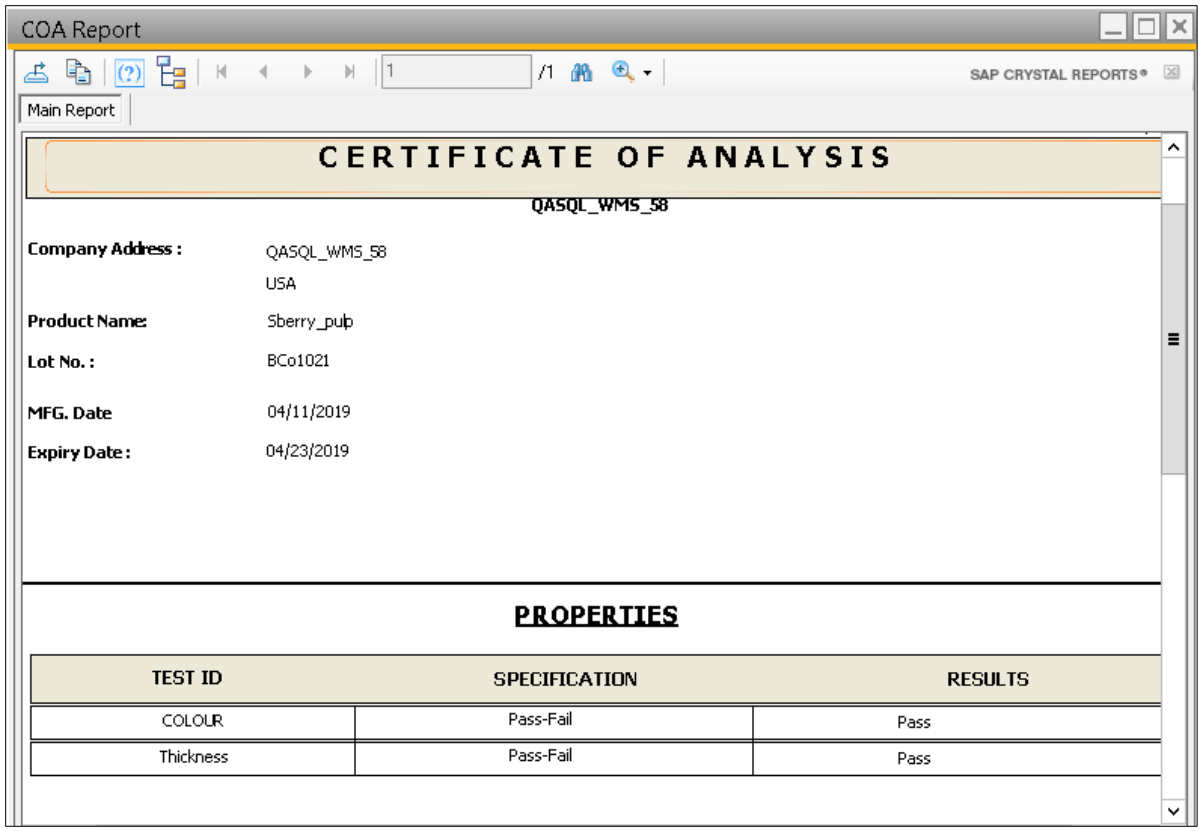
Print: Click the *Print* button to generate a report fulfilling the above specified criteria.

Cancel: Click the *Cancel* button to cancel the request for report generation.

5.7.1 Generating a COA Report

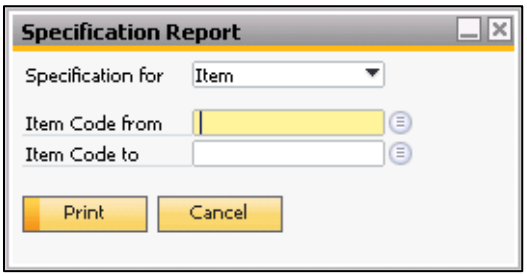
1. In the *Enter Batch No. From* and *Enter Batch No. To* fields, enter the lower and upper limits, respectively, of the range of batch numbers used to filter QC test details for the report.
2. In the *Enter Lot No. From* and *Enter Lot No. To* fields, enter the lower and upper limits, respectively, of the range of lot numbers used to filter QC test details for the report.
3. In the *Actual End Date From* and *Actual End Date To* fields, enter the lower and upper limits, respectively, of the range of batch closure dates used to filter QC test details for the report.
4. Click the *Print* button to generate the report.

An example of a generated *COA Report* is displayed below.



5.8 Specification Report

Use the *Specification Report* screen to generate a report that displays specifications for a select range of items/formulas.



Specification for: Indicate whether you want to generate the report for items or for formulas.

Item Code From/Formula ID From: The lower limit of the range of items or formulas for which you want to generate the *Specification Report*.

Item Code To/Formula ID To: The upper limit of the range of items or formulas for which you want to generate the *Specifications Report*.

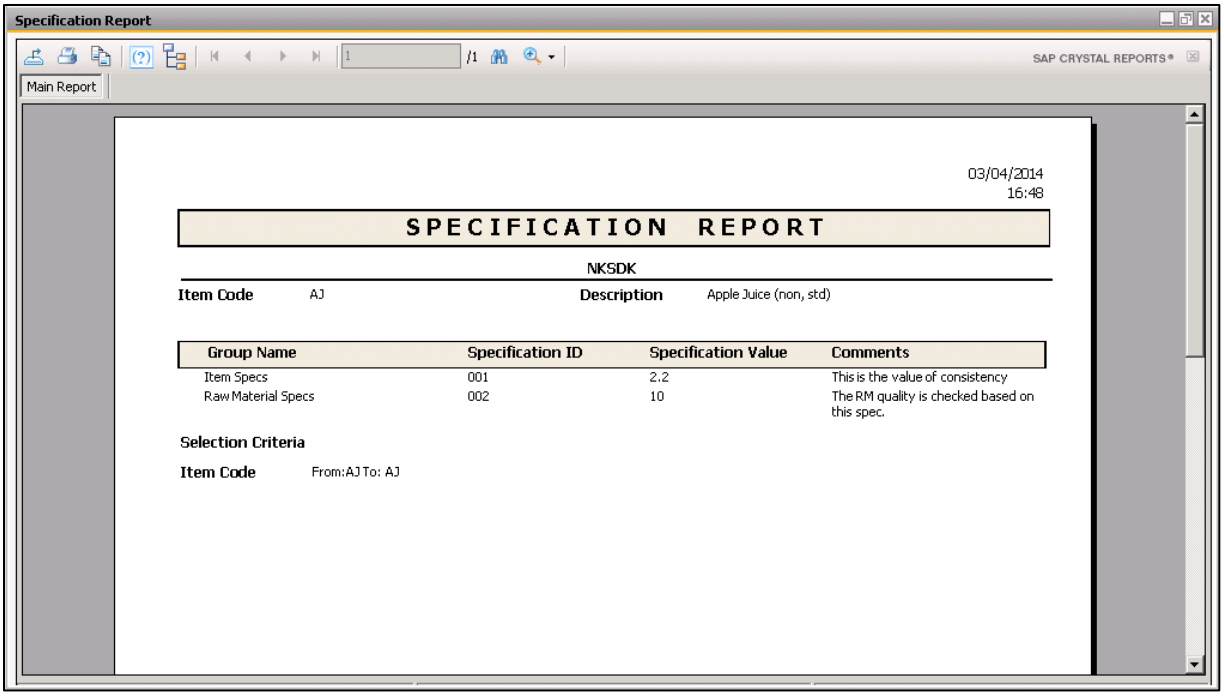
Print: Click the *Print* button to generate the report.

Cancel: Click the *Cancel* button to cancel the request for report generation.

5.8.1 Generating a Specifications Report

1. In the *Specifications for* field, select the option for which you want to generate the report. Available options are *Item* or *Formula*.
2. Enter the range of item codes or formula IDs to filter specifications of items/formulas pertaining to this range.
3. Click the *Print* button to print the report.

An example of a generated *Specification Report* is displayed on the following page.



6 GLOSSARY

Term	Definition
Alpha-numeric	A measurement type for quality control tests whose result is a combination of alphabets and numerals.
Bin	A container or location in the warehouse where an item is stored.
Formula	A list of ingredients, their proportions, and instructions for making a product.
Inventory QC	A quality control method deployed to verify if the items stocked in inventory meet the desired set of standards.
Lot Expiration	A term used to indicate expired lots or the lots nearing expiration.
Numeric	A measurement type for quality control tests whose result is a numeric value.
Pass/Fail	A measurement type for quality control tests whose result is binary (pass or fail).
Purchase QC	A quality control method deployed to verify if the purchased items meet the desired set of standards.
Quality Control	A system that enables a company to ensure that their products or services adhere to the desired set of standards.
Sales QC	A quality control method deployed to verify if the saleable items meet the desired set of standards.
Sampling	A method of studying a material or a collection of items from a small portion of material or few selected items instead of studying the entire lot.
Sampling Plan	A detailed outline for selecting a sample that represents the entire lot of material in terms of the desired quality control parameters.
Warehouse	A location, generally large, that enables a manufacturer to store raw materials, intermediates, and finished goods before they are sold or distributed.